



England's Seafood Industry:  
Skills, Recruitment and Retention

## Executive Summary

The seafood industry in England comprises a number of different but interrelated sectors - aquaculture, catching, fish frier, processing, and retail which employ some 80,000 people.

The industry, while relatively small compared to other sectors, is of great importance beyond its contribution to employment and GDP and this has been underlined by the food security concerns raised during the Covid-19 epidemic.

In parallel with the unique challenge of a global pandemic and the ensuing lockdown of the UK economy the industry is also facing major challenges from Brexit in the form of anticipated changes in fishing quotas and new trade agreements.

In spite of the existing and potential negative impacts, all of this points to opportunities for the industry. The catching sector is emblematic, but all sectors will have to adapt to thrive in the post-Brexit environment.

The Sea Fish Industry Authority (Seafish) is a Non-Departmental Public Body tasked with improving efficiency and raising standards across the industry. It is at the forefront of facilitating change and driving improvement across a united industry. Seafood 2040 (SF2040) is a strategic, collaborative two-year project facilitated by Seafish in partnership with The Department for Environment Food and Rural Affairs (Defra) and various seafood industry partners. It sets out an ambitious, England-only vision for a thriving and sustainable seafood industry which would benefit the whole of the UK.

In September 2019, the SF2040 programme, the SF2040 Seafood Industry Leadership Group (SILG), and EMFF funded an invitation to tender for a study designed to address one of the twenty-five recommendations from SF2040; viz:

Recommendation 16:

- Map skills, recruitment and retention needs and issues across the entire value chain and,
- Review best practice with regards to training, skills development and workforce retention within the UK and overseas

Pye Tait Consulting was awarded the contract for this important work in December 2019 and work began in January 2020.

### Approach

The study involved both detailed secondary research and two elements of primary research.

Secondary research involved desk work on existing seafood reports and publications and on overseas approaches to the subject topics.

Primary research consisted of an employer survey which returned 288 individual responses, 36 depth interviews with employers and stakeholders, a focus group in the Southwest of England, and 30 participants in an extended nominal group to add depth to the first two interventions.

The study was designed and initiated prior to the advent of the Covid-19 pandemic and lockdown (mid-March to May 2020). Both desk and field work were in progress at the time of the lockdown but it was decided, in conjunction with the SF2040 programme and Seafish, that the results of the research were of such importance to the industry that it should be completed.

### Key Findings

#### Skills & Qualifications

Perhaps the most important finding concerning skills in the seafood industry is that skills and qualifications are relatively unknown, unappreciated, and quite widely under-estimated. This is evidenced by the recruitment issues flagged up by stakeholders and employers during this research.

Each of the sectors is, however, highly skilled in specialist areas and require the same levels and diversity of business and management skills seen in all other economic sectors. For example:

- Aquaculture – very high science skills, high animal care skills, business management, marketing, customer relations. Surveyed employers regard almost 75% of permanent staff as highly skilled or skilled.
- Catching – complex high-level combinations of skills in navigation, seamanship, ship engineering and handling, safety at sea, survival, fire precautions and fighting, fish identification, equipment handling, net management and repair. Around 70% of permanent staff are regarded as skilled or highly skilled by surveyed employers.
- Processing – high manufacturing and equipment skills, business and process management, advanced hand skills such as filleting, hygiene and packing skills. Around 50% of permanent staff are regarded as skilled or highly skilled by surveyed employers.
- Fish friers – high skills in preparation of food, cooking, management of equipment, business management, marketing, customer relations. Employers surveyed regard 58% of their staff as skilled or highly skilled.
- Retail – highly skilled fishmongers, business management, purchasing, marketing, customer relations. Employers surveyed said that 60% of their staff are graded as Recognised, Advanced or Master Fishmongers

## Skills, Recruitment and Retention in England's Seafood Industry

Skill levels and their “labelling” and promulgation are, on the surface, a matter of simple numbers and official classification systems. However, they matter because they underpin the way in which a sector is regarded by potential recruits, by parents, career advisers and teachers, and by those already employed within the sectors.

England's seafood industry is highly-skilled but this is not obvious to outsiders from the disaggregated and diverse sets of certificates and qualifications required.

### Skills Gaps

Different sectors have different skills gaps but the need for technical and digital skills was mentioned across the board.

Also mentioned by high numbers of respondents were:

- Marketing (especially digital marketing)
- Digital skills for the whole range of staff (e.g. in click and collect and online trading)
- Technical skills (especially in aquaculture)
- Business skills – strategy, planning, finance for managers
- Supervisory training
- Selling and selling on
- People management and mentoring skills for managers and supervisors
- Multi-skilling for certain sectors (e.g. filleting and marketing for catchers)

### Training Provision

Employers called for assistance in training for the above priority skills but most particularly for flexible and easily accessible video and online approaches which can be made accessible to lower skilled staff and those whose first language is not English.

Training and qualifications in the England's seafood industry tend to be driven by mandatory requirements – for such areas as health & safety, sea survival, firefighting, and first aid – and by difficulties in releasing staff for training. Consequently, a great deal of training is conducted on the job through mentoring and tutoring by senior staff.

The employer survey found that more than nine in ten employers use “on-the-job” training often or occasionally, and 60% never use external training.

With respect to external training, 11 providers alone deliver over 200 courses across England but there is considerable duplication by region.

### Recruitment

England's seafood industry is extremely diverse, and it is therefore impossible to design and adopt a one-size-fits-all approach to recruitment. However, we found during this study that employers would appreciate help and guidance with the ways in which recruits should be attracted, informed and interviewed.

The results from our survey of employers reveal that much recruitment in the industry – across almost all sectors – is by word of mouth. This is partly a reflection of the relatively low numbers of people required and partly a result of the high degree of localisation in the seafood industry.

Throughout the sectors there were requests for guidance and checklists for interviews and help and materials to support ways of informing interviewees of the scope of the work.

In particular, employers ask for ways of promoting the good points (e.g. the prospects and excitement) about working in the industry without giving potential employees unrealistic expectations.

### Retention

In general, England's seafood industry does not appear to suffer from serious retention issues. As one retail stakeholder said, once someone has been in the sector for six-months they tend to remain for a long time.

There are calls across all sectors, however, for more awareness videos to give a more realistic but inspiring vision of work in any given sector and to aid employers in their recruitment and retention efforts. The range of instructional videos could also be used as promotional and awareness tool for the sectors.

### Age Profile

For the entire UK workforce, the proportion of employed people who are over the age of 45, is 41.3% (2019). The equivalent proportion for the surveyed element of the Seafood industry is 35.6% with only 13% being over the age of 55 years of age.

Taken in its entirety the industry does not have an "ageing" workforce, but this is an average picture which takes no account of the situation in specific sectors, specific roles within sectors, or given regions or localities. The survey showed that some 43% of catching employees are over 45 years but that the equivalent proportion for the processor workforce is 26% in other words quite a youthful workforce

### Comparable nations

As described in Section 7 of the main report, the identification of lessons from comparable nations is a difficult process. What works in one nation – with its very unique educational and training systems and its equally singular history and culture, may not work in England, no matter how successful it may appear to be.

France, for example, has a very successful system for educating and training people into its seafood industry. However, what is worth considering for the industry in England is not so much the detail of the French approach as its philosophy.

The UK seafood industry, for example, has evolved a disparate set of certificates and qualifications which, together, enable a person to acquire competence over a lengthy period of time and in an iterative manner. In France and the Netherlands this process is much more focused into a formal education and training process in schools and colleges so that a person emerges into the industry after already acquiring almost all the skills and knowledge required and having being thoroughly immersed in the realities of its working life.

Germany and Iceland, too, lean towards formal school and college-based learning systems with formal qualifications for all levels of staff – and this includes the processing sector and fishmongering (and – in separate career streams – the restaurant and cooking roles which are known as the foodservice sector in the UK).

The Netherlands have developed a system of video and online training courses to support individual progression.

### Recommendations

The widely reported “negative industry image” is not just about awareness and the need to better communicate that these are highly skilled sectors with excellent opportunities for progression and advancement, but also about job status – which is further linked to the disparate and disaggregated nature of most qualification structures in all sectors from retail and fish frier to catching, processing and aquaculture.

The majority of stakeholders agreed that a negative industry image is having a detrimental effect on recruitment. They argue that this is especially the case with young people, who tend to perceive the industry as being dirty, smelly, hard work, and low paid. Stakeholders are keen to rectify these stereotypes for many jobs have high earning potential and career progression with many different opportunities available. People in the industry understand the importance of engaging with young people at school and college level to show them how rewarding a career in the industry can be and the opportunities and benefits that come with it.

Unlike in the previous century the status of job roles within an industry today is very much linked to their formal qualifications structures. The qualification structures and levels need to be re-assessed and addressed for each sector as a matter of urgency and progression and career pathways developed.

Based on the findings of this study we also recommend:

### Training

- 1. Digital awareness training** – Technology use is increasing in amount and in the depth to which it affects job roles. The digital revolution is affecting different sectors and different roles in different ways but managers and supervisors certainly need much deeper awareness of the ways in which the digital world can leverage productivity and profits and aware of it and its significance to entering the catching sector; all levels of staff require training that focuses on inputting data digitally and learning how to use technological equipment digitally;
- 2. Cooperatives** – As numerous small businesses in different sectors attempt to resurrect themselves after the Covid-19 epidemic it may be of assistance to have training available on how to establish and run cooperative ventures which combine the strengths of several small companies;
- 3. Marketing and social media** – There is high demand for this training which will help businesses reach a wider audience and will have a positive impact on improving industry image by using modern methods of communication and advertising. Few businesses we spoke to during this study have a full understanding of the absolute importance of modern marketing and customer relationship management. We found that such knowledge as exists is “siloeed” and that managers are having difficulty understand the ways in which marketing elements are linked and inter-dependent;
- 4. Click and Collect** – Training for businesses who need support establishing this service which is important for the future success of many smaller businesses and has proved vital during the Coronavirus pandemic;
- 5. Selling on** – Guidance/short courses on how to push add-on sales effectively to generate more income for fish frier and retail businesses;
- 6. Catch sales** – Teaching fishermen how to process (fillet, store, etc.) and sell their catch is an innovative way for fishermen to survive during uncertain economic periods when sales to traditional customers may not be possible;
- 7. Training videos** – Videos are a very successful and highly regarded way to learn and practise new skills with step-by-step guidance. Additional YouTube style videos would work well for all sectors. They should be available on one website or portal to ease accessibility;
- 8. Train the Mentor** – There is a large number of “train the trainer” courses available but very few which explain the most effective ways to mentor staff. Such training would bring benefits to almost all sectors but especially to catching and retail;
- 9. Financial Management training** – Many sectors have explained their need for financial training in the light of the Covid-19 pandemic and outcomes. Managing debt, pricing, cash flow management, etc are all urgently needed by many small and medium sized businesses;

- 10. Introductory days for prospective new entrants** – From a careers perspective it may be highly desirable to develop an industry-wide network of companies willing to offer Introductory Days. These will offer a taster of the sector and provide new entrants with a more realistic understanding of the job;
- 11. Promotion of “Introduction to Commercial Fishing” course** – Promoting this course more effectively to industry outsiders so they are
- 12. Salesmanship and customer service training** – Retailers pointed out the need for new or enhanced tools to improve sales and customer service;
- 13. Seafish website navigation**– The Seafish website works well for frequent users. However, navigation and accessibility improvement will be needed for those who use the site infrequently and for potential new entrants - with clear messaging and visual aids;
- 14. Access to “over 16.5m” skipper training** – The catching sector needs more ticketed individuals due to what is seen as an ageing workforce. Improve promotion of this training by focussing on progression from crew to wheelhouse and the transferable skills gained through this training.
- 15. New customs procedures and documentation** - Leaving the EU will involve the introduction of documentation to ensure compliance with HMRC declarations, including the implications of the NI protocol. There will be a requirement for individuals to be trained to manage any new procedures.

### Recruitment

- 1. Recruitment ‘toolkits’** – Develop and provide businesses with a sector-specific toolkit that offers guidance on writing attractive job advertisements, how to get the most of out their website, and what important questions should be asked at interviews. Materials in the recruitment toolkits should be available to everyone in the industry online and take the form of videos, case studies and role descriptions;
- 2. Lessons from other industries’ messaging** - The ‘Go Construct’ website, run by the Construction Industry Training Board (CITB), is a good example of a resource that young people can go to in order to learn more about the construction and built environment industry;
- 3. Clear communication of opportunities in the industry** – Promote opportunities in the industry with clearer communications showcasing careers, apprenticeships, work experience and the different routes into the industry. Offer young people a career map which depicts the qualifications, experience and routes for particular roles and sectors;
- 4. Less text, more infographics** – Websites, social media platforms and any literature aimed at young people should be aesthetically attractive and incorporate images and videos of people at work. This will give them a realistic picture of what a job looks like in the industry. Some



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potential new entrants will have limited literacy – design of promotional collateral should take this into account;

- 5. Effective messaging-** Research young people's aspirations and perceptions of the industry and use the data to develop messages and approaches for employers to use when speaking to potential recruits;
- 6. Key workers** – Learning from the Coronavirus pandemic, being a key worker may now be seen as a more attractive career choice. Ensure recruitment messages depict that industry workers are essential and key workers, from fisherman to supermarket counter staff.

### Retention

- 1. Status** – Developing a higher-status image for seafood industry job roles in England is perhaps the single most effective way of retaining staff;
- 2. Career pathways** – As mentioned above, a visual pathway for each sector should be produced and used;
- 3. Guidance on employer branding as a retention tool** – Develop a toolkit – perhaps alongside others as part of a series to improve “employer branding” by demonstrating how to offer staff benefits including bonuses, additional pension contributions, birthday days off, “ideas” schemes, cycle to work schemes, staff social events, ongoing skills progression, and health and mental health advice. These benefits demonstrate to staff and potential new entrants that the employer is invested in them and that they are valued.

### Covid-19

The early reaction across England's seafood industry was one of deep shock, particularly in retail and fish frying where most businesses closed their doors. Aquaculture businesses and catchers saw an immediate fall off in demand as restaurants and hotels ceased ordering and export markets were closed. Similarly, processors whose main markets were in hospitality saw an immediate drop in business.

Employers in all sectors put recruitment on hold, laying off staff, concerned that their businesses would not survive the pandemic. Expansion plans and staff training immediately slipped down the list of priorities and employers who had been working on opening up new export markets ceased or postponed that work.

As the Coronavirus crisis deepened, processors and fishmongers were reporting difficulties in obtaining supplies of fish. Businesses began to take up Local Authority business support grants of £10,000, as well as Business Interruption Loans. Interviewees indicated these would be a short-term fix. At the same time many employers were continuing to furlough all or part of the workforce.

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In a somewhat unexpected effect of the pandemic, aquaculture businesses began experiencing problems with fish welfare and had concerns about selling fish that were becoming oversized for restaurants. Some reported difficulties sourcing feed.

However, after the initial shock of the Coronavirus, English businesses started to adapt and innovate in order to survive. Fishmongers, catchers, processors and some aquaculture producers began to operate home delivery services or, where they already did this, to expand them. Some told us that they were recruiting additional van drivers and even buying or renting extra vehicles to support these ventures.

Nevertheless, a minority of employers in all sectors told us that they would need grant funding to enable their businesses to recover from the pandemic. Some suggested they would need financial management training to help them plan their recovery.

In late April the Government committed £10m in support to the fishing and aquaculture sectors. About 1,000 fishing and fish-farming businesses are expected to benefit. Vessels up to 24 metres in length – small to medium-sized boats – which recorded catches worth at least £10,000 last year are eligible for a share of the main £9m fund. A further £1m will be for schemes to help fishermen sell their catch in their communities.

### **The Legacy**

The Covid-19 pandemic will leave a deep and lasting legacy. There are businesses that may not survive the disruption and others that may fail during the recession which is predicted to follow it.

Many businesses have run down any cash reserves during the course of the pandemic and the struggle to stay in business. Many others will have Business Interruption Loans to pay off. There are fears that business failures may affect these companies further into the near future and will have impacts up the supply chain. Some hotels and restaurants may never re-open. Demand may change, businesses supplying 'luxury' seafood e.g. lobsters and oysters might take longer to recover than others.

While fish friers and retail were badly hit, the lasting impacts may well be greatest in the processing sector where social distancing and the need for extreme care with physical production facilities may create the need not only for innovative thinking but drastic changes to the way in which productivity is maintained and improved.

### **Change**

In many ways the Coronavirus has led to an acceleration of change in the industry, with a move towards click and collect and online sales, home deliveries, home working, and an accelerated

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adjustment to and adoption of new technology. These are likely to stay in place and change the way the industry operates in profound ways.

Businesses that have successfully innovated during the pandemic appear to have been those which used new technology to leverage home working and communications. They are also those which

have close relationships with their customers and were able to keep in touch, rapidly publicise home deliveries, quickly develop online sales and click and collect, often through social media and effective websites.

### **Opportunity**

As a result of Coronavirus, the UK is predicted to move from a period of almost full employment to possibly 3 million plus unemployed. Hence the available labour pool that the seafood industry can recruit from will be much larger. Several retail chains have already announced redundancies; high calibre people with the digital skills forward-looking seafood retail and fish frier businesses need, will be on the jobs market. These people may be key to driving these sectors' digital future.

Following redundancies in manufacturing, processors may more easily find people with shortage skills e.g. technicians. Similarly, those businesses looking for unskilled operatives will have a wider talent pool to choose from, and existing staff will be less likely to leave. High calibre industry changers will bring new ideas to the seafood industry and a wealth of skills,

### **Covid-19 Recommendations**

Perhaps the most pressing things that the industry will have to deal with over the next 12 to 24 months will be the adaptation to new ways of working. This is for two reasons – firstly because the continued presence of the virus may necessitate such methods, but mainly because they have the potential to offer greater efficiencies and higher productivity.

We would therefore recommend specific Covid-19-related action to:

1. Support and underpin business development in terms of managerial and financial training;
2. Offer new or additional marketing courses to help businesses adjust to social media, online sales, and online communications;
3. Develop and offer new courses in customer relationship management;
4. Train businesses in the effective use of a web presence including SEO and website analytics;
5. Expand click and collect training to other sectors and to wider audiences;
6. In the rapidly changing situation, accurate and easily accessible information is key. The Seafish website and newsletters should continue to focus on this, with a core role of translating government and official guidance on e.g. social distancing and approved ways of working so they are relevant to each sector of the industry.

7. Catchers and aquaculture producers will be looking at new revenue streams and new business models, selling direct to retailers or the public. £1m of the £10m Government support package was to enable fishermen to explore selling direct to local communities. There will be a demand for training in small scale processing, food hygiene, customer relations, and marketing to support this.
8. Training should be adapted to enable industry changers to transfer to the seafood industry. This may be e.g. short courses for engineers moving into processing or just more effective mentoring aimed at operatives from other industries.
9. The industry should develop messaging, which predicts post Brexit growth. Employers should be encouraged to use this to appeal to high calibre industry changers.

### Brexit

To an understandable extent the issue of Brexit has been overshadowed by the advent of the Covid-19 pandemic. The UK's exit from the European Union, which we joined as the European Economic Community (EEC) in 1973, is due to be formalised in December 2020. The exact effect of our departure on the seafood industry is difficult to predict, but no sector will be unaffected; fishing quotas, the availability migrant labour, and trading terms for imports and exports are all currently uncertain.

In the processing and catching sectors, employers rely to varying extents on foreign labour and there is uncertainty at the time of writing as to what will happen regarding the movement of labour between the European Economic Area and the UK.

Many employers told us that they would like to be able to hire local labour (i.e. that available in England) if they could get it but there have been structural difficulties for many years which have restricted the availability of UK-based labour. Structural difficulties include: the tendency for young people to stay in education; England's low rate of unemployment over the past decade; and aspirations shifting away from manual employment.

As things stand the approach to migrant labour seems to be moving towards a "points-based" system which will permit suitably qualified professionals, and workers who are filling a shortage situation, to enter on working visas. However even in the latter category it seems likely that there will be a requirement for at least Level 3 skills.

Our research found a good deal of qualitative and anecdotal feedback about Brexit along the lines discussed above but in answer to specific questions about the impacts of Brexit almost all sectors were clear that it has had, and will have, little or no impact on business. Reticence about future implications for the industry could be due to uncertainty about the final terms of the UK's exit from the EU, combined with a tendency for employers to adopt a 'wait and see' attitude while focusing on immediate issues.

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It is also important to recognise that labour is not the only concern of the seafood industry where Brexit is concerned. The terms of trade between the EU and the newly independent UK are of great importance.

Where recruitment is concerned almost all seafood sectors expressed little concern as to the impact of Brexit. The sectors which expressed the greatest anxiety were processing and catching but the proportions of employers believing that Brexit would make recruitment more difficult were, nevertheless quite low. In the processing sector just under 10% of employers said that Brexit will make recruitment slightly more difficult over the next twelve months. The equivalent figure for the catching sector is 14% of employers.

Tariffs or other action to limit exports to the EU could be followed by the UK government imposing tariffs on EU exports of fish to the UK. This would see the English industry catching more fish, having limited or different export markets, and a potentially an increased domestic market. The industry would be faced with the marketing challenge of switching domestic consumers from imported species to those caught in domestic waters; together with the challenge of seeking new export markets.

The outcomes of diplomatic negotiations during 2020 (and beyond) are unknown but it is very clear that the final outcomes are unpredictable and that, consequently, the seafood industry will have to prepare itself for a number of different results. Preparing for new export markets and a degree of growth are very sensible approaches which will be advantageous regardless of the UK-EU outcomes in the Brexit negotiations.

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## 1. Introduction

England's seafood industry comprises a number of different but interrelated sectors - aquaculture, catching, fish frying, processing, and retail. Together they employ some 80,000 people. A major employer in some regions, the industry has great importance beyond its contribution to employment and GDP.

The seafood supply chain was forced to change rapidly and dramatically by the Covid-19 pandemic. New systems of working have seen accelerated developments in marketing innovation and uptake of technology. Nationally the pandemic will restructure industries and may create new pools of potential recruits for a seafood industry with elevated status with respect to food security.

The outcome of Brexit negotiations is far from certain, but anticipated changes in fishing quotas and new trade agreements will be key drivers of change, pointing to opportunities for the industry. The catching sector is emblematic, but all sectors will have to adapt to thrive in the post-Brexit environment. In spite of their possible issues, taken together, the complex and evolving situation surrounding Covid-19 and Brexit, together with seafood's place in the drive towards healthy eating, herald a period of change and opportunity for the industry.

The Seafood Industry Authority (Seafish) a Non-Departmental Public Body tasked with improving efficiency and raising standards across the industry, is at the forefront of facilitating change and driving improvement across a united industry. Seafood 2040 (SF2040) is a strategic, collaborative two-year project facilitated by Seafish in partnership with The Department for Environment Food and Rural Affairs (Defra) and various seafood industry partners. It sets out an ambitious, England-only vision for a thriving and sustainable seafood industry which would benefit the whole of the UK.

In September 2019, the SF2040 programme, the SF2040 Seafood Industry Leadership Group (SILG), and EMFF funded an invitation to tender for a study designed to address one of the twenty-five recommendations from SF2040; viz:

Recommendation 16:

- Map skills, recruitment and retention needs and issues across the entire value chain and,
- Review best practice with regards to training, skills development and workforce retention within the UK and overseas

The industry needs this comprehensive knowledge of the skills, training, recruitment and retention landscape in order to drive change, innovation and improvement across all sectors and capitalise on opportunities presented by Covid-19 and Brexit.

Pye Tait Consulting was awarded the contract for this important work in December 2019. Contracts were signed and work began in January 2020.

### 2. The Study

#### 2.1 Aims

The study was focused on the following research aims, each of which reflects an element of the client-brief

1. Establish current skills levels, and levels of recruitment and retention;
2. Improve the client's understanding of potential skills and training provision gaps;
3. Identify current recruitment problems, trends and likely future labour market demands;
4. Identify any overseas best practice in seafood training, recruitment, and retention beneficial to the industry;
5. Obtain reliable and detailed reference data covering employment patterns in the seafood industry in England; and
6. Recommend actions based on the overall analysis to ensure a labour force that is suitably trained and skilled to meet its future requirements and an industry that can effectively address its skills, recruitment and retention needs and issues.

#### 2.2 Approach

The study was designed and initiated prior to the advent of the Covid-19 pandemic and lockdown (mid-March to May 2020). Both desk and field work were in progress at the time of the lockdown but it was decided, in conjunction with the SF2040 programme and Seafish, that the results of the research were of great importance to the industry and that it should be completed.

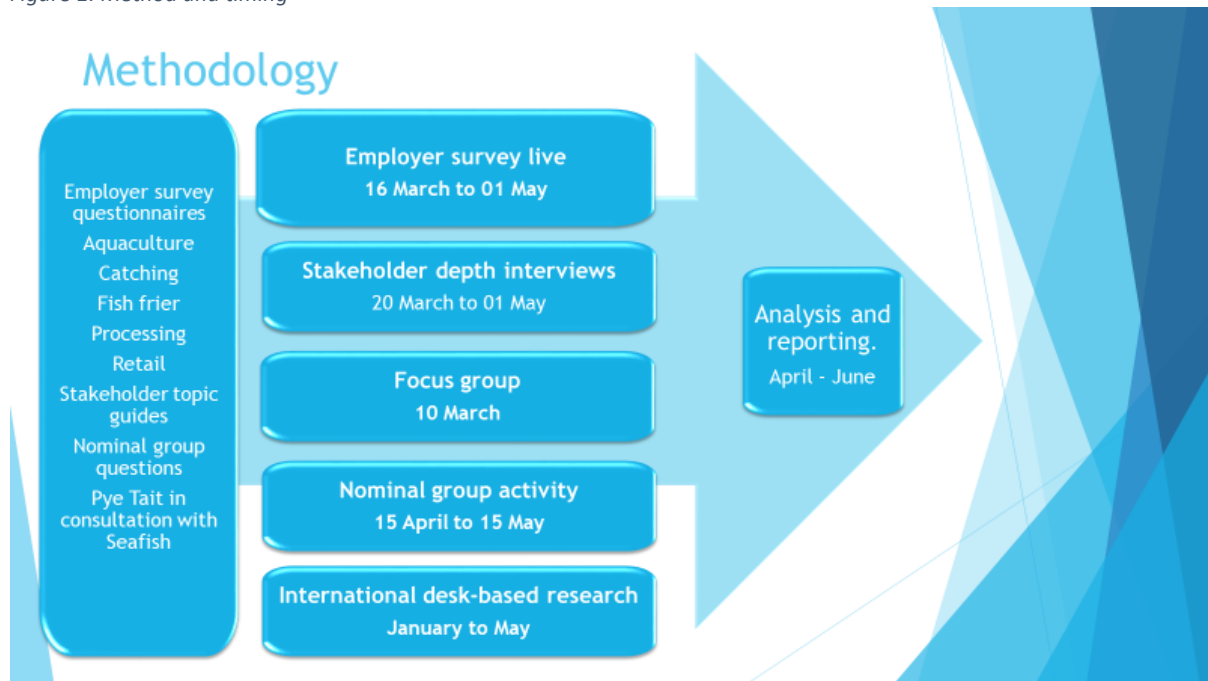
At the time – mid-March 2020 – no-one knew how the lockdown would work and what people's reactions to the pandemic and the unique social needs would be. Nevertheless, we developed a plan of action to meet the changed circumstances and these were agreed by SF2040.

The result was that every element of the original approach to the research was met (although with slightly fewer completed interviews – as described below).

The diagrams (Figures 1 and 2) below illustrate the overall timing of the study and the broad targets for the research elements.

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Figure 1: Method and timing



Source Pye Tait 2020

With the agreement of the SF2040 programme, research targets were adjusted at the beginning of the Covid-19 pandemic in the UK to ensure that respondents could be contacted remotely. At the time there was no experience of having to adjust a methodology in this way and no certainty that the revised approaches would work in practice. Employers across the UK were shutting down or trying to adjust to having staff work from home or on furlough. In the absence of prior experience there was uncertainty what proportion of employers would be contactable, and how employers would react to being contacted – even remotely – about such research during a major disruption. The Covid-19 pandemic is probably the most severe blow to the UK economy since 1939 and arguably beyond that date.

It says a great deal about the seafood industry that the research was well received and that the only reason for the research not achieving the original targets was that so many employers and stakeholders were simply unreachable.

In the midst of the pandemic and lockdown, the study achieved 288 completed surveys with employers. Some 275 of these were completed by telephone, the remainder online. In-depth telephone interviews were arranged and completed with 36 stakeholders. One focus group was held before Covid-19 lockdown prevented others taking place. In addition, thirty senior stakeholders and employers took part in a multi-contact nominal group exercise to acquire deeper insights into sector issues. Nominal Groups are a method of obtaining deep qualitative data from stakeholders and employers without incurring the disadvantages of face to face groups in which dominant or senior

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attendees can often skew results. Nominal groups are based on group members receiving a series of iterative questions (usually by email or telephone interview). The answers are then collated and subsequent questions directed at members of the group to achieve greater depth. Individual members do not know who gave specific opinions and are therefore less likely to be swayed in their responses by identities or seniority.

Figure 2: Research targets (adjusted)



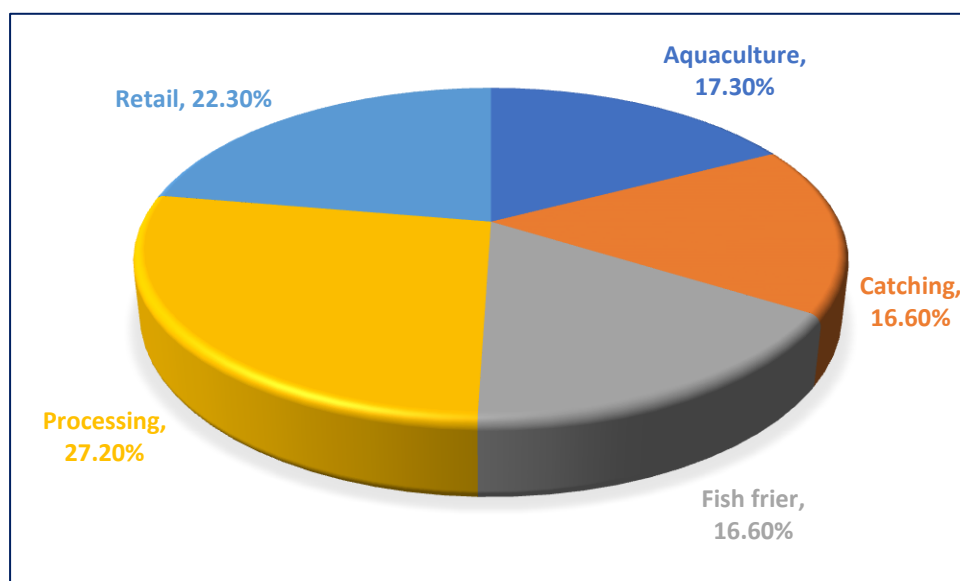
Source Pye Tait 2020

The completed employer interviews were spread fairly evenly across all sectors (Figure 3).

Although originally tasked to explore best practice in similar overseas industries in Iceland, New Zealand, Germany, and the Netherlands, we also added research into the sector in France and Spain.

## Skills, Recruitment and Retention in England's Seafood Industry

Figure 3: Surveyed sectors (%) in England



Source Pye Tait survey 2020

The impact of the Covid-19 lockdown can be seen in the survey responses as illustrated in Table 1. This shows the response in terms of employees covered by the survey rather than numbers of businesses. With the fish frier sector consisting mainly of very small businesses and the very severe impact of the lockdown on food service companies it proved difficult to contact fish friers.

Response rates from the rest of the sector were, however, far in excess of the 95% confidence interval and – in fact close to the 99% interval.

Table 1: Survey response rates in England (by employment)<sup>1</sup>

	Sector employment*	Surveyed employees	%
<b>Aquaculture</b>	1080	278	25.7
<b>Catching</b>	5060	1429	28.2
<b>Fish frier</b>	60000	364	0.6
<b>Processing</b>	10320	2404	23.3
<b>Retail</b>	2500	324	13.0
<b>Excluding fish frier sector</b>	<b>18960</b>	<b>4435</b>	<b>23.4</b>

<sup>1</sup> Sector employment figures were sourced from: Aquaculture source: CEFAS, Aquaculture statistics for the UK, a focus on England and Wales 2012 Catching sector source: Marine Management Organisation, UK Sea Fisheries Annual Statistics Processing source: Seafish, Processing Industry Enquiry Tool 2018 Retail source: ONS, Business Register and Employment 2018 Survey 2018 Fish frier: Data supplied by the National Federation of Fish Friers (NFFF) 2020

### 3. Key Findings for England

#### Skills & Qualifications

Perhaps the most important finding concerning skills in the seafood industry is that skills and qualifications are relatively unknown, unappreciated, and quite widely under-estimated. This is evidenced by the recruitment issues flagged up by stakeholders and employers during this research.

Each of the sectors are, however, highly skilled in specialist areas and require the same levels and diversity of business and management skills seen in all other economic sectors. For example:

- Aquaculture – very high science skills, high animal care skills, business management, marketing, customer relations
- Catching – complex high-level combinations of skills in navigation, seamanship, ship engineering and handling, safety at sea, survival, fire precautions and fighting, fish identification, equipment handling, net management and repair
- Processing – high manufacturing and equipment skills, business and process management, advanced hand skills such as filleting, hygiene and packing skills
- Fish friers – high skills in preparation of food, cooking, management of equipment, business management, marketing, customer relations
- Retail – highly skilled fishmongers, business management, purchasing, marketing, customer relations

Skill levels and their “labelling” and promulgation are, on the surface, a matter of simple numbers and official classification systems. However, they matter because they underpin the way in which a sector is regarded by potential recruits, by parents, career advisers and teachers, and by those already employed within the sectors.

England's seafood industry is highly skilled but this is not obvious to outsiders from the disaggregated and diverse sets of certificates and qualifications required.

### Skills Gaps

Different sectors have different skills gaps but the need for technical and digital skills was mentioned across the board.

The following were also prioritised for survey and depth interview respondents

Also mentioned by high numbers of respondents were:

- Marketing (especially digital marketing)
- Business skills – strategy, planning, finance for managers
- Selling and selling on
- People management skills for managers and supervisors
- Multi-skilling for certain sectors (e.g. filleting and marketing for catchers)

### Training Provision Gaps

There are gaps in the provision of training and development in a number of crucial areas. Many respondents requested more video and online provision with instruction relying less on written or spoken English, – particularly where the levels of literacy are low or where employees do not speak good English. Priority gaps i.e. those receiving the most mentions by telephone survey and depth interview respondents include:

- Digital skills
- Technical skills – particularly in aquaculture and processing
- Mentoring training for managers and supervisors
- Specific and dedicated supervisor training
- Training in new techniques and approaches – especially click and collect and online trading

### Recruitment

England's seafood industry is extremely diverse and it is therefore impossible to design and adopt a one-size-fits-all approach to recruitment. However, we found during this study that employers would appreciate help and guidance with the ways in which recruits should be attracted, informed and interviewed. Throughout the sectors there were requests for guidance and checklists for interviews and help and materials to support ways of informing interviewees of the scope of the work. In particular, employers ask for ways of promoting the good points (e.g. the prospects and excitement) about working in the industry without giving potential employees unrealistic expectations.

Training providers and member organisations are familiar with the Seafish website and can generally find information that they need. However, navigation of the website is not intuitive especially for industry outsiders. Similarly, Seafish Training eAlerts are appreciated by the industry, but, potential

## Skills, Recruitment and Retention in England's Seafood Industry

recipients must visit the Seafish website and go through a sign up process for these, so they are not easily accessible to industry outsiders.

Awareness videos are required to underpin a more well-founded appreciation of work in each sector; where videos are available they should be more accessible. Employers would like people to start the job and their training course with a more realistic impression and understanding of what will be required of them. Even some new entrants who have studied at college or university in a specific sector are said to be unprepared and have unrealistic expectations of the job. A catching sector stakeholder spoke of new entrants not knowing they would be self-employed. Processors spoke of new employees not being aware of the working environment and how physically demanding the work is.

*'There is a big barrier around perception. For those who ... enter the industry the reality of the job is that it is ... physically hard work in a not that pleasant environment!'*

**Processor South West**

### Retention

In general, England's industry does not appear to suffer from serious retention issues. As one retail stakeholder said, "once someone has been in the sector for six-months they tend to remain for a long time."

Where retention issues have appeared however, stakeholders and employers said that a lack of awareness of the industry was the main underlying cause. The argument – supported by many respondents – is that, because the industry is relatively poorly understood in careers circles and by teachers and parents, new entrants can lack any genuine understanding of what they are joining, with the result that they leave quite soon.

There are calls across all sectors for more awareness videos to give a more realistic but inspiring vision of work in a sector and to aid employers in their recruitment and retention efforts.

The range of instructional videos could also be used as promotional and awareness tool for the sectors.

Employers can have difficulty retaining new entrants when they are undertaking their mandatory training. For example, many new catching entrants are unaware of the realities of working at sea, the nature of the work and what it entails. Some employers report paying for mandatory training, only for new entrants to drop out before completing it, or very soon after. Sometimes due to being unprepared for the physical demands of the role, the arduous conditions and occasionally due to seasickness.

*'How do you make it attractive? The reality is that they will not be hand catching in a beautiful bay in the sunshine. The reality in February is rather different and we can't change that'*

**Catcher South West**



### **Skills, recruitment and retention practice in comparable nations**

As described in Section 7, the identification of exemplars from abroad which might be of value to the English industry is a difficult process. What works in one nation – with its very unique educational, training systems and its equally singular history and culture, may not work in England, no matter how superficially successful it may be.

France, for example, has a very successful system for educating and training people into its seafood industry. However, what is interesting for the English industry is not so much the detail of the French approach as in its philosophy.

The UK seafood industry, for example, has evolved into a disparate set of certificates and qualifications which, together, enable a person to acquire competence over a lengthy period of time and in an iterative manner. In France this process is much more focused into a formal education and training process in schools and colleges so that a person emerges into the industry after already acquiring almost all the skills and knowledge required and having being thoroughly immersed in the realities of its working life.

Germany and Iceland, too, lean towards formal school and college-based learning systems with formal qualifications for all levels of staff – and this includes the processing sector and fishmongering (and – in separate career streams – the restaurant and cooking roles which are known as the foodservice sector in the UK).

In the Netherlands, they have similar educational approaches and a similar basic sea-oriented educational structure but have developed a good system of video and online training courses to support individual progression.

A possible way forward for England which is clear and very ambitious is a formal educational and qualification structure – particularly for the catching sector together with associated career pathways and progression routes. This would be challenging, but there is an implicit lesson from overseas practice that it is necessary to develop ways of recognising the combined effects on a person's skill-level of multi-skilled roles such as skippers and deckhands (at different levels).

### 4. Recommendations

**The widely reported “negative industry image”, as described to the authors by high proportions of stakeholders and employers, is not just about awareness and the need to better communicate that these are highly skilled sectors with excellent opportunities for progression and advancement, but also about job status – which is further linked to the disparate and disaggregated nature of most qualification structures in all sectors from fishmongering and fish frier to catching, processing and aquaculture.**

1. The qualification structures and levels need to be addressed for each sector as a matter of urgency and progression pathways developed.
2. The majority of stakeholders and employers agreed that a negative industry image is having a detrimental effect on recruitment, especially of young people who perceive the industry as being dirty, smelly, hard work, and low paid. Stakeholders are keen to rectify these stereotypes, for many jobs have high earning potential and good career progression with many different opportunities available. Improving image is not simply a matter of engaging with young people at school and college level to show them how rewarding a career in the industry can be but also one of developing career/qualification paths to compete with other industries.

Based on the findings of this study we also recommend:

#### Training

1. **Digital awareness training** – Technology use is increasing therefore training that focuses on inputting data digitally and learning how to use technological equipment digitally will be imperative for the future of the industry;
2. **Cooperatives** – As numerous small businesses in different sectors attempt to resurrect themselves it may be of assistance to have training available on how to establish and run cooperative ventures which combine the strengths of several small companies;
3. **Marketing and social media** – There is high demand for this training which will help businesses reach a wider audience and will have a positive impact on improving industry image by using modern methods of communication and advertising. KFE Ltd. already deliver social media and marketing training at their KFE School of Frying Excellence;
4. **Click and Collect** – Training for businesses who need support establishing this service which is paramount for the future success of businesses and has proved vital during the Coronavirus pandemic;
5. **Selling on** – Guidance/ short courses on how to push add-on sales effectively to generate more income for fish frier and retail businesses;

6. **Catch sales** – Teaching fisherman how to fillet and sell their catch is an innovative way for fisherman to survive during uncertain economic periods when sales to traditional customers may not be possible;
7. **Training videos** – Videos are a very successful and highly regarded way to learn and practise new skills with step-by-step guidance. Additional YouTube style videos would work well for all sectors. They should be available on one website or portal to ease accessibility;
8. **Train the Mentor** – There is a large number of “train the trainer” courses available but very few which explain the most effective ways to mentor staff;
9. **Financial Management training** – Many sectors have explained their need for financial training in the light of the Covid-19 pandemic and outcomes. Managing debt, pricing, cash flow management, etc are all urgently needed by many small and medium sized businesses;
10. **Introductory days (activities/events) for prospective new entrants** – From a careers perspective it may be highly desirable to develop an industry-wide network of **organisations**/companies willing to offer Introductory Days. These will offer a taster of the sector and provide new entrants with a more realistic understanding of the job;
11. **Promotion of Introduction to Commercial Fishing course** – Promoting this course more effectively to industry outsiders so they are aware of it and its significance to entering the catching sector;
12. **Salesmanship and customer service training** – Retailers pointed out the need for new or enhanced tools to improve sales and customer service;
13. **Seafish website navigation**– The Seafish website works well for frequent users. However, navigation and accessibility improvement will be needed for those who use the site infrequently and for potential new entrants - with clear messaging and visual aids;
14. **Access to “over 16.5m” skipper training** – The catching sector needs more ticketed individuals due to what is seen as an ageing workforce. Improve promotion of this training by focussing on progression from crew to wheelhouse and the transferable skills gained through this training.
15. **New customs procedures and documentation** - Leaving the EU will involve the introduction of documentation to ensure compliance with HMRC declarations, including the implications of the NI protocol. There will be a requirement for individuals to be trained to manage any new procedures.

### Recruitment

1. **Recruitment ‘toolkits’** – Develop and provide businesses with a sector-specific toolkit that offers guidance on writing attractive job advertisements, how to get the most of out their website, and what important questions should be asked at interviews. Materials in the

recruitment toolkits should be available to everyone in the industry online and take the form of videos, case studies and role descriptions;

- 2. Lessons from other industries' messaging** - The 'Go Construct' website, run by the Construction Industry Training Board (CITB), is a good example of a resource that young people can go to in order to learn more about the construction and built environment industry;
- 3. Clear communication of opportunities in the industry** – Promote opportunities in the industry with clearer communications showcasing careers, apprenticeships, work experience and the different routes into the industry. Offer young people a career map which depicts the qualifications, experience and routes for particular roles and sectors;
- 4. Less text, more infographics** – Websites, social media platforms and any literature aimed at young people should be aesthetically attractive and incorporate images and videos of people at work. This will give them a realistic picture of what a job looks like in the industry. Some potential new entrants will have limited literacy – design of promotional collateral should take this into account;
- 5. Effective messaging**- Research young people's aspirations and perceptions of the industry and use the data to develop messages and approaches for employers to use when speaking to potential recruits;
- 6. Key workers** – Learning from the Coronavirus pandemic, being a key worker may now be seen as a more attractive career choice. Ensure recruitment messages depict that industry workers are essential and key workers, from fisherman to supermarket counter staff.

### Retention

- 1. Status** – Developing a higher-status image for seafood industry job roles in England is perhaps the single most effective way of retaining staff;
- 2. Career pathways** – As mentioned above, a visual pathway for each sector should be produced and used;
- 3. Guidance on employer branding as a retention tool** – Develop a toolkit – perhaps alongside others as part of a series to improve “employer branding” by demonstrating how to offer staff benefits including bonuses, additional pension contributions, birthday days off, “ideas” schemes, cycle to work schemes, staff social events, ongoing skills progression, and health and mental health advice. These benefits demonstrate to staff and potential new entrants that the employer is invested in them and that they are valued.

## 5. The Industry

The industry which catches, farms, processes, and sells England's seafood is relatively small but of immense potential for the economy, particularly in view of the imminent exit of the UK from the European Union and the additional emphasis on food security resulting from the experience of the Covid-19 pandemic.

The seafood industry as a whole employs almost 80,000 people across five sectors, with the fish frier sector representing more than 75% of the industry's total employment. There are around 7,500 fish and chip shops/restaurants in England but many more food outlets serve the output from the industry.

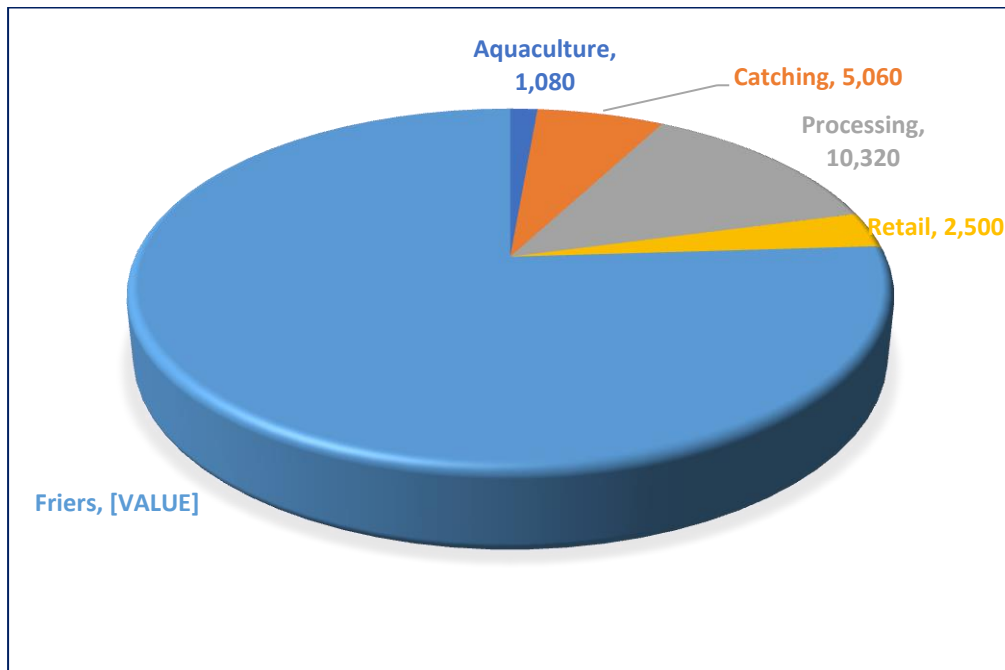
England's employment in the fishing fleet represents around half of the UK total. A high proportion of businesses and employment in the catching and processing sectors is located in Scotland.

*Table 2: Industry employment by sector in England (2017-18)<sup>1</sup>*

Sector	Est. Employment	% of total employment
Aquaculture	1,080	1%
Catching	5,060	6%
Processing	10,320	13%
Retail	2,500	3%
Fish frier	60,000	76%
<b>Total</b>	<b>78,960</b>	

## Skills, Recruitment and Retention in England's Seafood Industry

Figure 4: Industry sectors in England (by employment)



Data Sources as Table 2

The industry, in common with many others, is finding it difficult to attract and recruit staff – particularly young people – which has the effect of requiring higher levels of resource (human and financial) to be tied up and spent in the recruitment process.

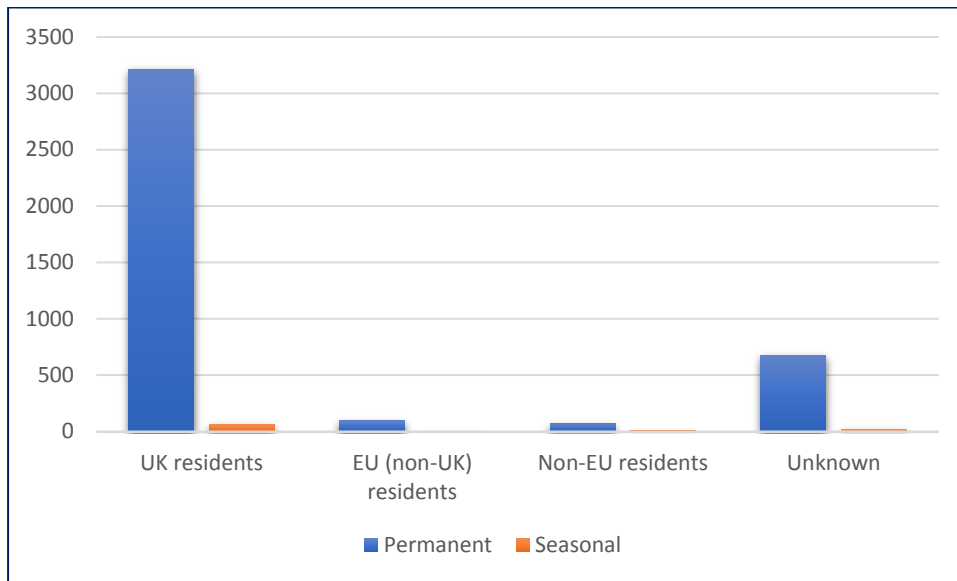
*Certain* sectors – as demonstrated in this report – also have an “ageing” workforce. A further characteristic of the industry (with the exception of fish friers ) is that it *is highly localised* – especially along specific coastlines – Cornwall, Devon, the North East, etc.

In England the industry is not heavily dependent on non-UK labour (

) and the main issues as a whole are trade barriers, quotas, and the pattern of ownership of vessels and quota by businesses and individuals located in other nations.

# Skills, Recruitment and Retention in England's Seafood Industry

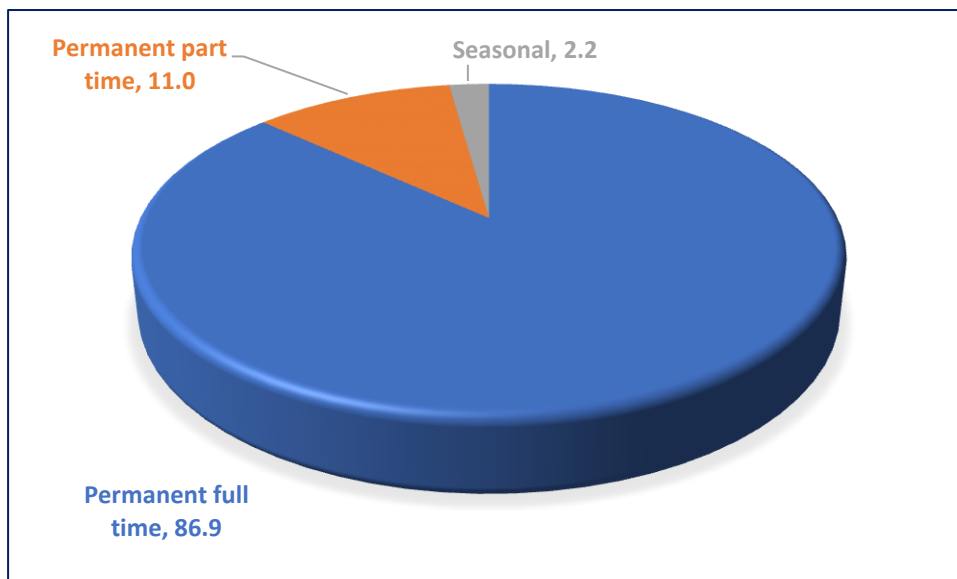
Figure 5 Staff by residency in England (numbers)



Source Pye Tait Survey 2020

The industry as a whole is made up of mainly permanent staff (98%), of which number around 10% are employed on a part-time basis (Figure 6).

Figure 6: Mode of employment in England (%)



Source Pye Tait Survey 2020

### 5.1 Training

The industry adopts slightly different training approaches within each sector. These are described in detail in Section 6 of this report.

Certain sectors have more apprenticeship frameworks available to them (although few of the frameworks are specific to seafood and none to sea-fishing) while others have long-established technical training routes. The latter category includes fishing/catching which has eight approved training organisations available to it for sea-going skills and a further twenty training providers who offer courses in “onshore” skills.

Providers offering ‘onshore training’ tend to be smaller organisations often just one person, whereas ‘offshore’ providers are generally colleges or private training providers employing a number of trainers.

Apprenticeships are available in the processing, fish frier, and retail sectors and there are short fish frier courses available (from National Federation of Fish Friers and KFE) and aquaculture (from LANTRA, the National Training Organisation for Land Based Industries).

Training and qualifications in the England's seafood industry tend to be driven by mandatory requirements – for such areas as health & safety, sea survival, firefighting, and first aid – and by difficulties in releasing staff for training. Consequently, a great deal of training is conducted on the job through mentoring and tutoring by senior staff.

Several employers and stakeholders who we interviewed in depth mentioned that they were aware that the industry would need to keep abreast of technical developments and that they could see that the workforce would need to develop more technical skills e.g. use of software and digital devices, understanding of databases, inputting data digitally rather than hand-writing it, analysing data – especially customer data – using digital means, etc.).

As with other UK sectors employers tend to value experience above formal training and qualifications. It is important that such statements and the views of employers with respect to experience are not misinterpreted. Employers are not saying the training is not important but that the learning which comes with time on the job and the regular and constant informal coaching and mentoring of senior staff constitutes an extremely important element of an individual's knowledge and skillset.

Respondents spoke highly of video-based training courses, especially, the 47 which are provided by Seafish, as being flexible and of good quality. They use mentors from among their senior staff but regret the lack of accessible training in the mentoring process itself and some have asked for a video



## Skills, Recruitment and Retention in England's Seafood Industry

training course on practical mentoring. Similarly, a high proportion mentioned that their managers and supervisors lack specific training in applied management and supervision skills.

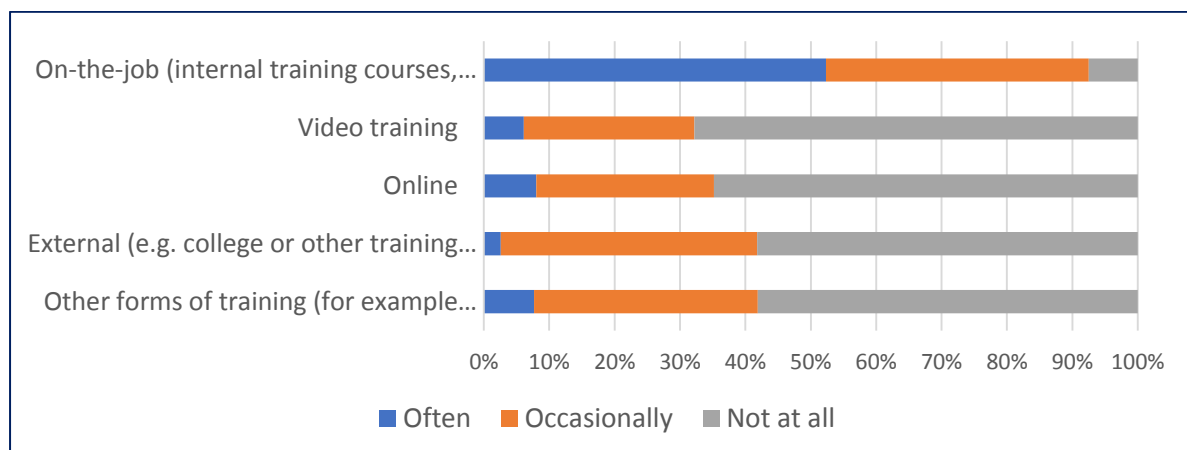
*Visual and functional works – people in the industry are doers but literacy skills can be limited – YouTube type tutorials would be much more powerful.*

**Processor, South West**

The industry's overall use of selected training modes is illustrated in

**Figure 7.** More than nine in ten employers use “on-the-job” training often or occasionally, whereas 70% never use video training and 60% never use external training. With respect to external training, 11 providers alone deliver over 200 courses across England but there is considerable duplication by region.

Figure 7: Mode of training - seafood industry in England (permanent staff)



Source Pye Tait survey 2020

### 5.2 Age Profile

The age profile for the industry as a whole is shown in

**Figure 8.**

For the entire UK workforce, the proportion of employed people who are over the age of 45, is 41.3% (2019). The equivalent proportion for the surveyed element of the Seafood industry is 35.6% with only 13% being over the age of 55 years of age. For all sectors except fish friers, these response rates by employment ([Table 1](#)) mean that the age profiles are within +/- 2.5% of the figure for the sectors. Over 42% of England's seafood workforce is under the age of 35.

## Skills, Recruitment and Retention in England's Seafood Industry

The survey for this research obtained responses from employers of 4,799 people, of which 4,435 were from all sectors excluding fish friers. For this sample (i.e. for four out of five sectors) the survey obtained responses from the employers of over 23% of the workforce.

Taken in its entirety the industry does not have an “ageing” workforce but this is an average picture which takes no account of the situation in specific sectors, specific roles within sectors, or given

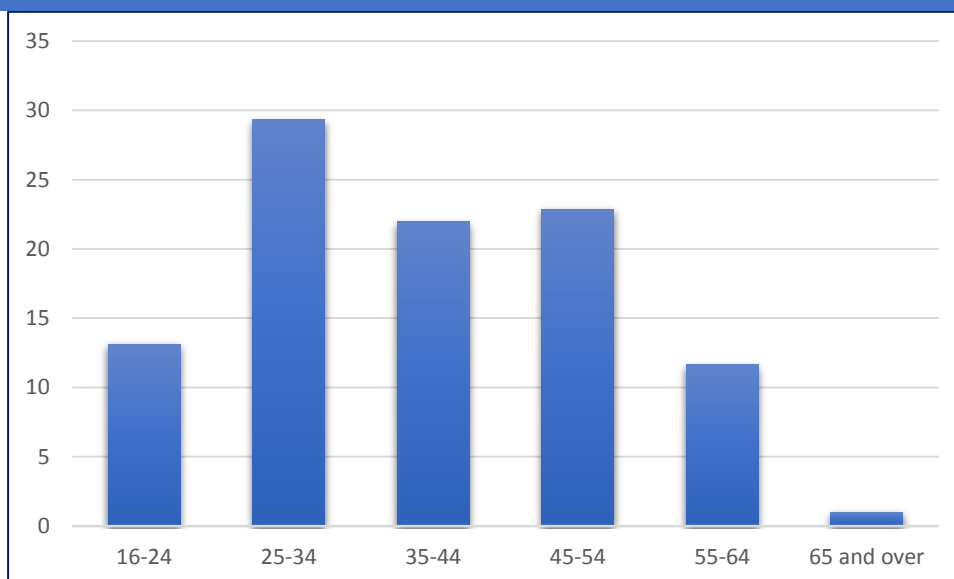
regions or localities. The survey showed that some 43% of catching employees are over 45 years but that the equivalent proportion for the processor workforce is 26% – in other words quite a youthful workforce. Furthermore sectors with high proportions of micro and small businesses may have large pockets of “ageing” employees due to the fact that small businesses tend to be run by their founders and that, quite often, the succession possibilities for the business are problematic. Employers were not asked detailed questions around this issue but research by the authors in other industries such as construction, hospitality, retail, etc. indicates that smaller businesses tend not to have formal succession plans, are extremely dependent upon the skills and energy of their founders, and sometimes do not have family members (or enthusiastic family members) to take over from the founders.

Similarly, in the catching sector and particularly for skippers, there is an ageing workforce with hardly any young people entering it. One membership organisation has 300 vessels with only five skippers under the age of 30. Ageing boat owners are relying on their children to take over the business when they retire.

Highly skilled and responsible roles such as boat skippers naturally tend to have a much older age profile than the whole sector but there is clearly a lack of succession possibilities in catching.

Image is often mentioned in connection with the difficulty of recruiting younger people, but this is not merely a matter of marketing the job, salary expectations, and progression pathways. It is also necessary to establish in the minds of young people the status of the job roles to which they could aspire; and status today usually relates to the perceived educational or qualifications level of that role.

*Figure 8: Age profile of the Seafood sector in England*



Source Pye Tait Survey 2020

### 5.3 Recruitment

The results from our survey of employers reveal that much recruitment in the industry – across almost all sectors – is by word of mouth. This is partly a reflection of the relatively low numbers of people required and partly a result of the high degree of localisation in the seafood industry. Communities tend to generate new recruits to a certain extent.

All sectors offer extensive career possibilities (including self-employment) and these are discussed further in the specific sector sections below. Many respondents complained that careers in the sector are, in their view, not well-enough promoted but they did admit that there are exceptions to this rule.

*Fishing is probably one of the highest paid industries for non-university qualified people. Often people have only done say four to five days mandatory training, but this isn't something which is promoted.*

**Catcher, South West**

### 5.4 Retention

Each sector of the industry exhibits its own unique profile where the issue of staff retention is concerned. These are discussed in the sector sections where employers have quantified the extent to which they have experienced vacancies and hard-to-fill vacancies. Taken as a whole, England's seafood industry does not appear to experience high levels of vacancies.

In the in-depth interviews we asked employers, stakeholders and membership organisations a number of questions around the subject of staff retention; about its importance as an issue, actions employers were taking to enhance retention levels, about career pathways and progression routes,

## Skills, Recruitment and Retention in England's Seafood Industry

about training and its impact on retention, and about whether there were any notable differences between “stayers” and “leavers”.

As one might expect, employers reported that retention is more of an issue with younger recruits and, in fishing, with deckhands who have progressed as far as they can go but without too much chance of further promotion. Several employers said that the main issue was with those at the lower end of the ability scale and with those whose work ethic is poor and who do not exhibit any real interest in the work.

*Lower-end of scale you spend all your time chasing them up. Where are they? We have a high turnover of them because they're not interested in work (that's why they've been out of work in the first place). They come to us because they got kicked out of the last job*

### **Aquaculture, North West**

A few employers said they felt that rates of pay were too low in their sector relative to others and that the nature of the work can be -off-putting for young people (e.g. the image of a dirty and cold catching sector, of production facilities being freezing cold and uncomfortable, and so on). However,

less than a third of the employers we interviewed said that retention was a major issue for them with the exception of retaining younger entrants.

### **Active initiatives**

One employer said that anything they do to actively improve retention rates is undermined by the “reality” of progression routes being too limited – in their words.

*... there are few mates and even fewer skippers – so the best deckhands get lured off into wind farms.*

### **Boat owner South West**

One employer said that they try to be as open as possible with their recruits and staff by trying to give them a clear idea of what their job is, what they can progress to if they reach certain standards, and the fact that there is wage progression as they get better at what they do. Another employer said that they try to run the business as a cooperative so that all staff share in the company's success. There had also been a number of other attempts to improve retention by larger companies, including improving communications with staff, giving financial and non-financial awards, and so on..

*Each month we have focus groups where they can bring to the table what's good and bad about the business, etc. We just launched a digital noticeboard, health & safety champion awards and other productivity awards.*

### **Processor, South West**

## Skills, Recruitment and Retention in England's Seafood Industry

One employer feels that the best way to retain staff is to pay them fairly, “treat them like human beings”, give them the occasional day off if the company has done well, and provide extra small benefits such as charity events, cake days, etc.

A membership organisation pointed out that some skippers pay over the odds to keep good people and can even pay this out of their own pockets to be sure of a good crew. Some fish farms provide houses and additional items such as bonuses, productivity schemes, health care, and extra on pensions. Larger processors offer flexible working to fit around school hours but say this has minimal effect on recruitment and retention. One processor offers subsidised holidays and life assurance.

### **Career pathways and progression routes**

Several employers expressed concern that England's industry's qualifications and career pathways are not yet truly reflective of the skills and knowledge required in many sectors. One said that:

*Although pay is very important and probably more so for most staff than progression routes, the public perception of most jobs is as being unskilled or at best low skilled.*

**Stakeholder; Processing**

Almost all the employers we spoke to were in favour of a “better” career structure and set of pathways. One succinctly stated that the real issue was status because current qualifications, job titles and public perception are not of sufficiently high status to attract or retain staff.

Another employer said that they want to be looking at apprenticeships but that there were not enough relevant ones available. This point was also made by a stakeholder who told us that a more realistic set of qualifications were needed to reflect what they see as the ‘true’ level of some jobs.

There is a view in all sectors that there are opportunities for talented people to do well, either by promotion or moving into self-employment; but equally it was acknowledged that this is not communicated well to potential new entrants.

*We should have case studies in businesses which show pathway and progression, our commercial director started as a filleter. Also, we have a high-level manager who came right from the bottom, and he's a non-UK worker.*

**Catcher-Processor, South West**

### Characteristics of stayers and leavers

Employers are generally clear that stayers are people who have a number of difficult-to-define characteristics. They have a good work ethic, they see the job as a way of life, are not only driven by pay, have a positive attitude to life, exhibit initiative, are willing to give just that little bit more, and, perhaps above all else, are interested in the work. An employer organisation suggested that stayers often want to live and work in the coastal area where they grew up.

*For the fishermen that have stayed, it is much more than a job. It is a way of life that they love and care very deeply about*

**Catcher, South East**

Leavers on the other hand tend to be people who are driven only by the wages, who do not seem to be interested in the work as a job, and who are not motivated by promotion and progression. In fact, one employer said that he feels that leavers are people who actively avoid promotion while still wanting higher wages. A membership organisation said that there appears to be a lot of wastage in the form of early dropouts (defined by the respondent as less than six months in the job).

A majority of employers used the phrase “want to get stuck in” with respect to stayers. In this context they meant that stayers are interested to learn and grow, and generally interested in the industry and “getting on”.

### Does training affect retention?

The overall reaction of employers is that training does improve retention, but that there is a significant downside in terms of the potential to lose the employee. One employer said that “bitter experience” had caused them to be very wary of training because they saw it as ‘training them to leave.’ As in many other sectors employers appear to be caught in a dilemma between ‘what if we train them and they leave, and what if we don’t train them and they stay?’

An employer organisation echoed the belief that training does help, but that it is not guaranteed. Quite often it just leads to people leaving for better money or conditions – fishing people move to wind farm work, etc. On the other hand, another employer was certain that training was generally beneficial to retention.

*If you invest in your staff by giving them the support they need to learn and grow and develop and adapt they will respect you and the business and are more likely to stay and want to develop within the business.*

**Processor, South West**

An employer organisation had a similar view:

## Skills, Recruitment and Retention in England's Seafood Industry

*If investing in training above and beyond normal standard stuff that's required by legislation or regulation, then I think it would improve retention. For example, doing things around customer services and leadership and management. It's a signal there is an investment in people above and beyond normal requirements.*

**Processor Stakeholder, North East**

One stakeholder pointed out that an interesting piece of fallout from the Covid-19 pandemic is that food providers are now seen very much as 'key workers'. From a career and recruitment point of view this could mean that their status has risen as a result.

*I think the industry image could be significantly improved going forward as well as making jobs seem more desirable to young people but, actually, I think Covid-19 is probably doing that for us quite well for 'key workers' are now getting more recognition than they usually do for providing food.*

**Employer Organisation, South East**

### 6. Sectors

#### Skills

Two of the key questions that employers were asked were about their appreciation of the level of skills in their company and sector. In both cases they were asked to apply scores on a scale of zero to ten. The first question asked for scores of the current skill level of staff against the skills needs of the business (where zero was unskilled and ten was highly skilled).

The subsequent question focused on the future demand for the skill for the sector as a whole. The time scale was seven to ten years and they were asked to score the skills from zero (sector demand would decrease considerably) to ten (sector demand would increase considerably).

Each question and set of skills has been dealt with separately for each sector in order to make clear the distinction in employers' minds between current skills in their own businesses and their assessment of the degree to which the sector would require the skills in the medium term future.

#### 6.1 Aquaculture

##### 6.1.1 Introduction

Although a relatively small sector in employment terms, aquaculture is a growing one and requires very high levels of skill in its core workforce.

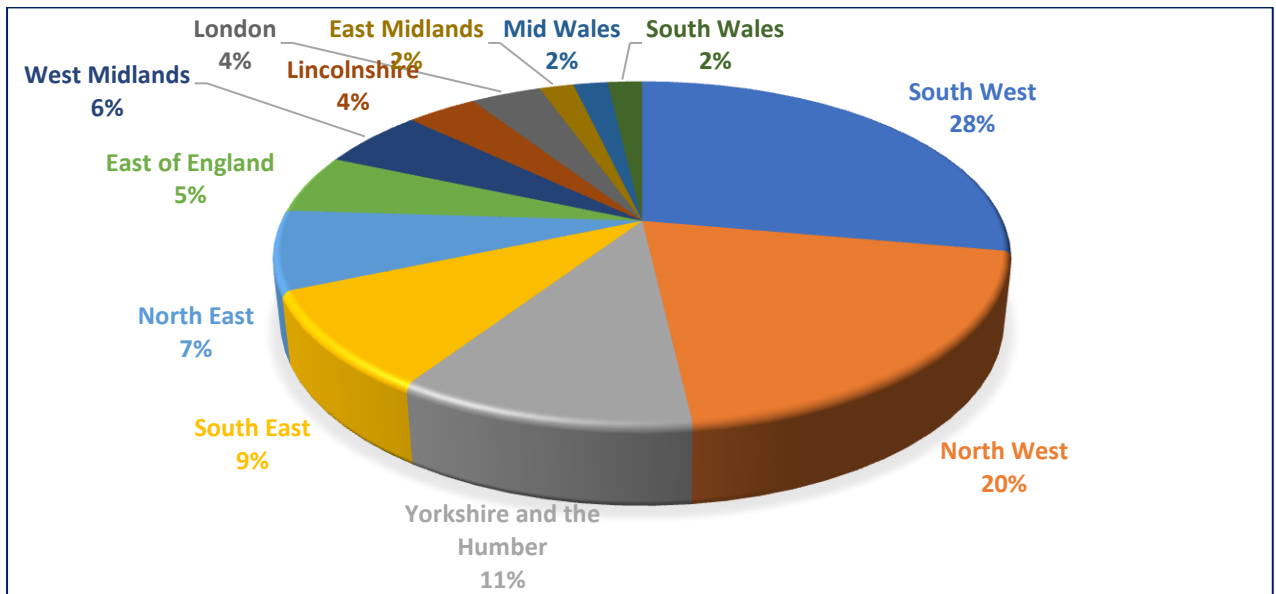
Our survey covered aquaculture companies headquartered in England with most respondents operating in the South West, North West, Yorkshire and the South East (Figure 9).

Sixty-one percent of the responding businesses farm trout for food, thirty-seven percent trout for sport, eighteen percent oysters and ten percent mussels (Figure 10).



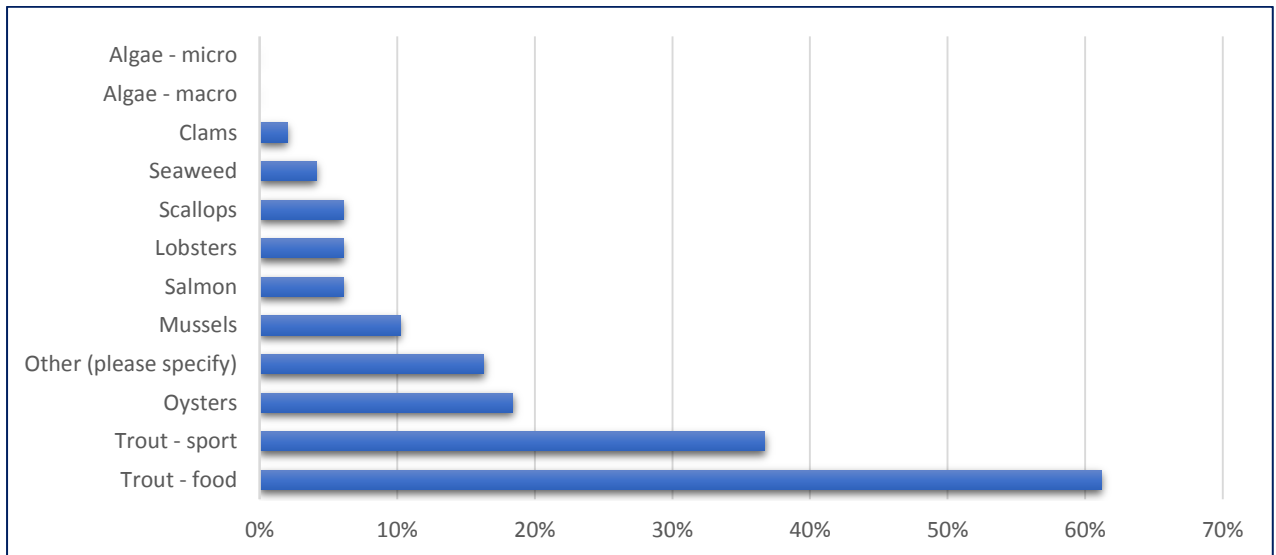
# Skills, Recruitment and Retention in England's Seafood Industry

Figure 9: Spread of aquaculture respondents by English region (%) (the businesses operating in Wales are headquartered in England)



Source Pye Tait survey 2020

Figure 10: Species farmed in England's aquaculture sector

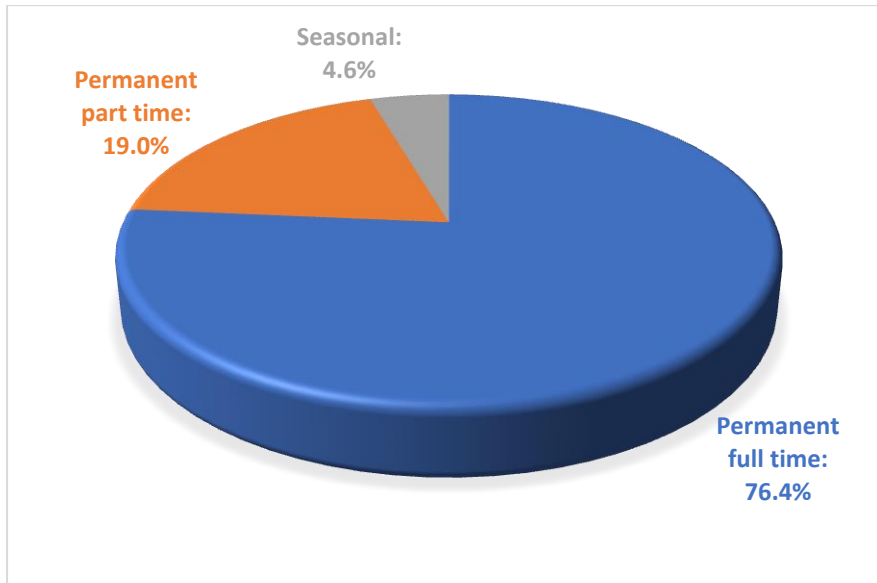


Source Pye Tait survey 2020

## Skills, Recruitment and Retention in England's Seafood Industry

Three quarters of the 284 employees reported by respondents are employed on permanent full-time contracts with a further 19% on permanent part-time arrangements (Figure 11).

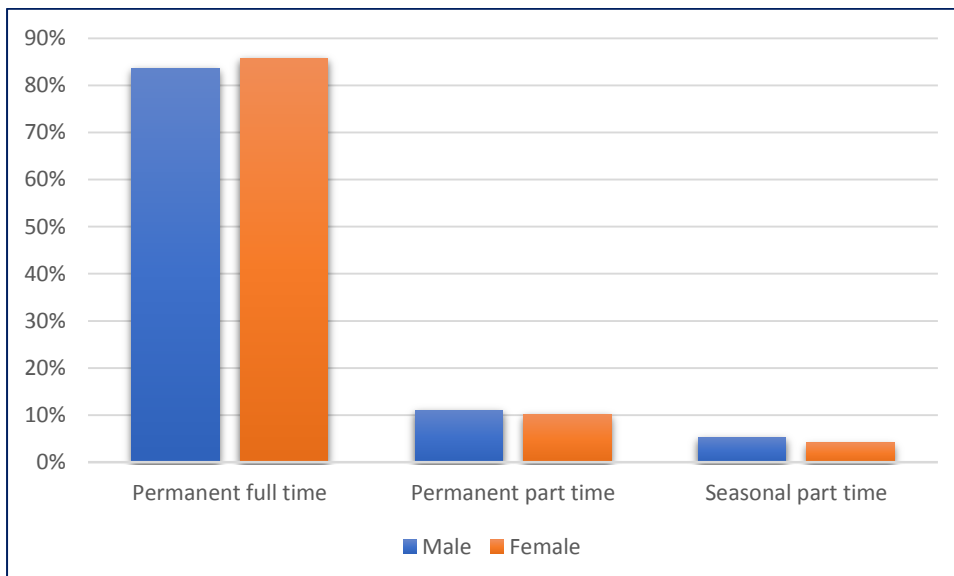
Figure 11: Employed workers by mode of employment in England's aquaculture sector (%)



Source Pye Tait survey 2020

Over 80% of both male (208 employees) and female (49) employees are employed on full time permanent contracts (Figure. 12).

Figure 12: Employment mode by gender in England's aquaculture sector

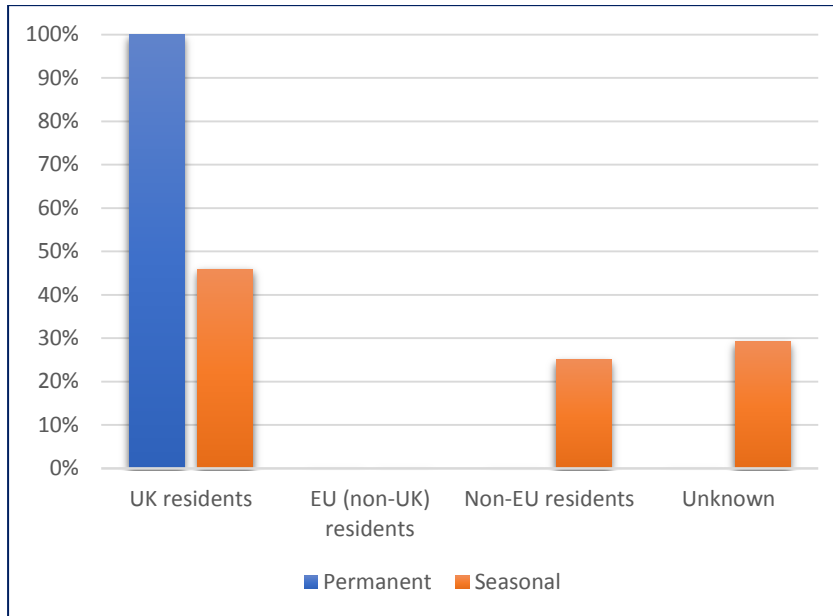


Source Pye Tait survey 2020

## Skills, Recruitment and Retention in England's Seafood Industry

All permanent staff are recorded as being UK residents. Just under half of seasonal staff are UK residents but employers did not know the countries of residence on one third of the seasonal staff.

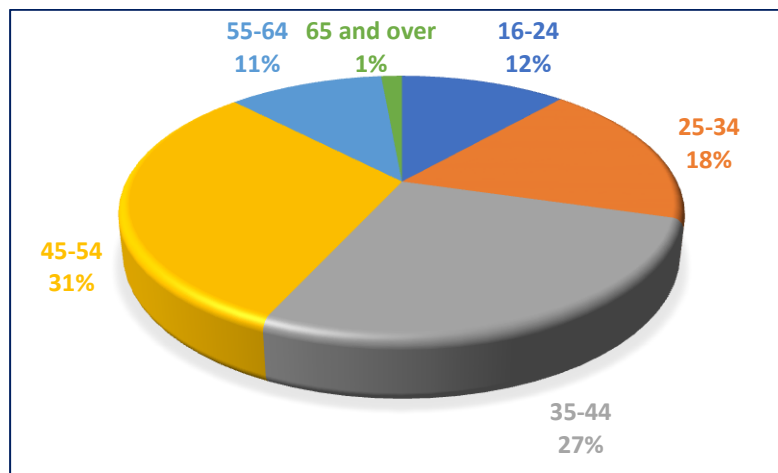
Figure 13: Residence by mode of employment in England's aquaculture sector (%)



Source Pye Tait survey 2020

Respondents from the aquaculture sector gave ages for 139 employees. Forty-three percent are aged over 45 years and 30% are under the age of 35.

Figure 14: Aquaculture age profile in England



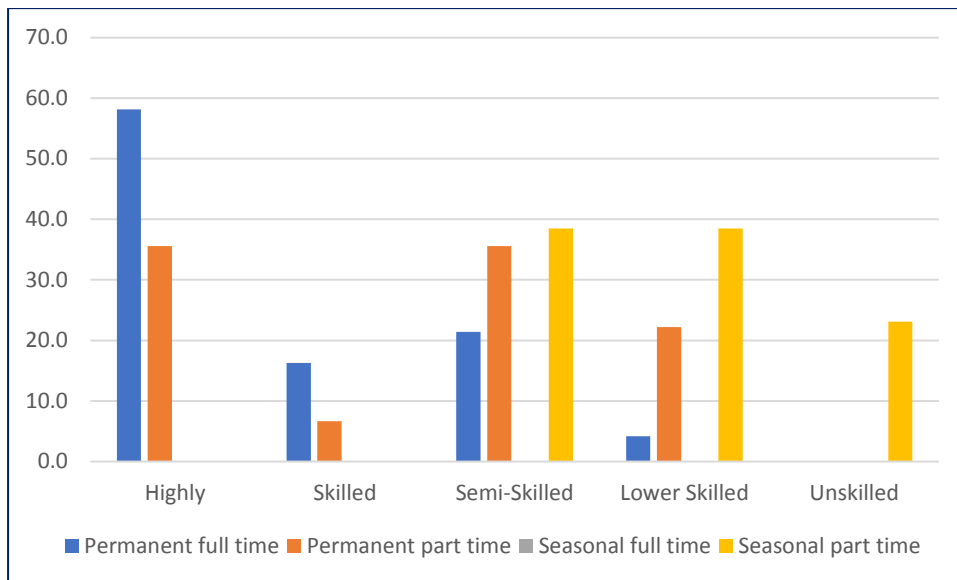
Source Pye Tait survey 2020

## 6.1.2 Skills

The level of skills required in the aquaculture sector is high –almost 75% of permanent staff required to be either highly skilled or skilled.

Almost all seasonal staff are semi-skilled or lower skilled with just over a fifth being unskilled.

Figure 15: Skill levels by mode of employment in England's aquaculture sector (%)



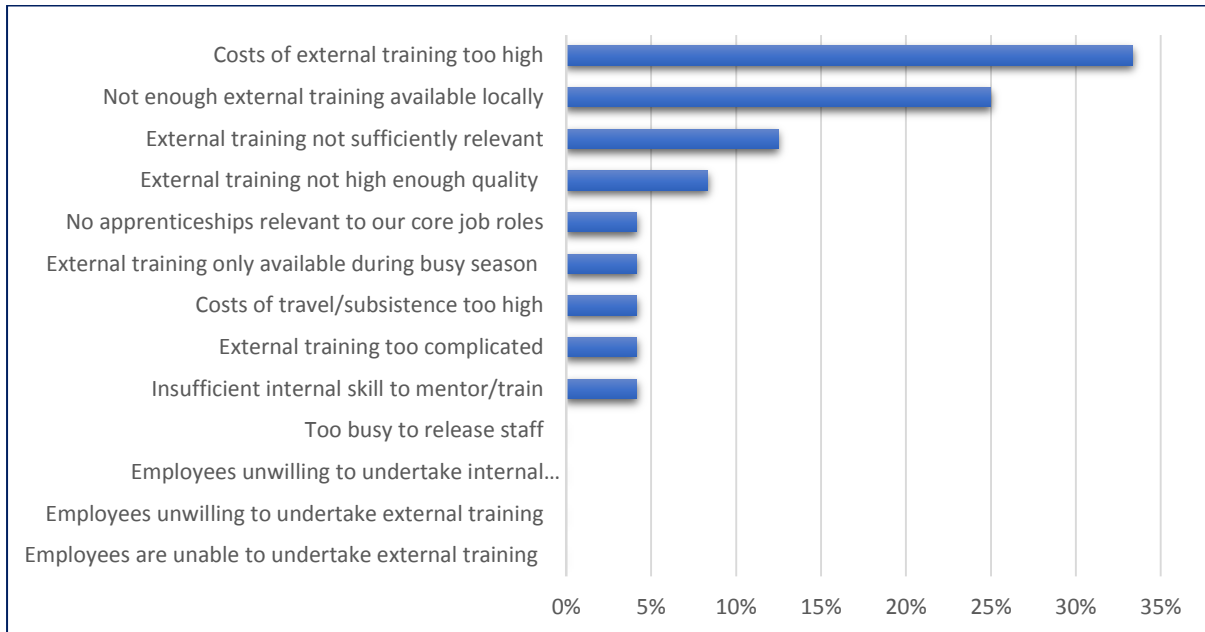
Source Pye Tait survey 2020

Figure 16 shows reasons given by employers for skills gaps within the current workforce. The two highest rated reasons were that the costs of external training are too high and that there is insufficient external training available locally.

A further fifth of employers said that external training was either not relevant or of insufficient quality.

# Skills, Recruitment and Retention in England's Seafood Industry

Figure 16: Reasons for skills gaps in England's aquaculture sector

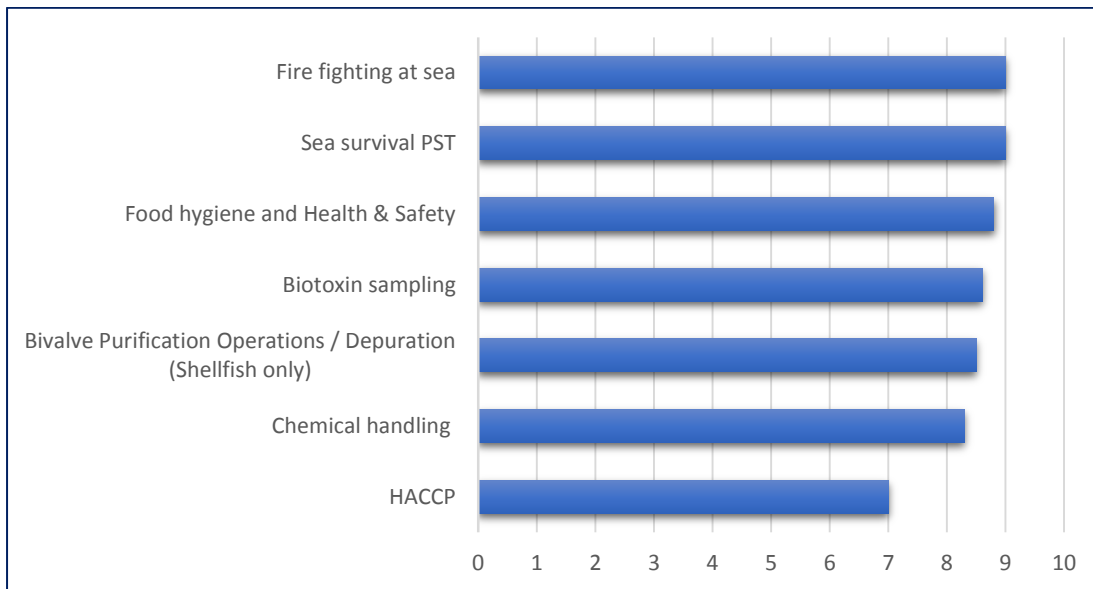


Source Pye Tait survey 2020

## Skills, Recruitment and Retention in England's Seafood Industry

Figure 17 illustrates the perceptions of employers in the sector as to the level of skill currently in their workforces. A score of zero represents no skill at all and a score of 10 indicates that the employer feels the current workforce is very highly competent in the specific skill.

Figure 17: Current skills amongst operative level staff in England's aquaculture sector



Source Pye Tait survey 2020

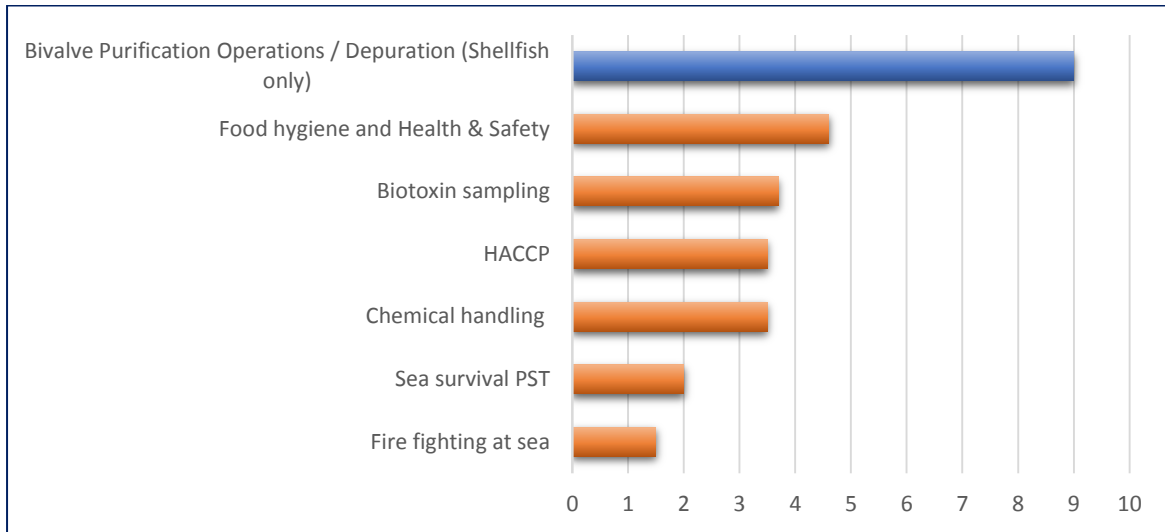
Employers rate most highly skills in mandatory training subjects such as firefighting, survival and health and safety. Overall, no skill scored less than seven.

With respect to future demand for the same skills (Figure 18) employers in aquaculture tended to be rather pessimistic. Skills other than bivalve purification all scored less than five indicating a perception that demand for them would decline. The recent focus by Seafish on an innovative online training and assessment solution for bivalve purification, may have influenced employers' perceptions.

Employers were asked to rate skills by their future importance to the sector; scores above five indicate increased future importance, scores below five indicate decreased future importance, these are coloured blue and orange respectively in Figure 18.

# Skills, Recruitment and Retention in England's Seafood Industry

Figure 18: Future demand for English aquaculture skills



Source Pye Tait survey 2020

As Figure 19 shows, employers view most current skills as being good or better.

Figure 19: Current skill level of supervisors and managers in England's aquaculture sector



Source Pye Tait survey 2020 Not all respondents could score every skill. In some cases, therefore, there are no responses

## Skills, Recruitment and Retention in England's Seafood Industry

The same pattern as for operative level skills repeats for supervisors and managers, however, with only competence in bivalve purification rated as excellent and all other skills believed to be declining in demand (Figure 20).

Figure 20: Future skills demand of supervisors and managers in England's aquaculture sector



Source Pye Tait Survey 2020 Not all respondents felt they could score every skill or provide specific responses. In some cases, therefore, there are no responses

### 6.1.3 Training

Much of the training in the aquaculture sector is created and managed by LANTRA. Aquaculture apprenticeships are only offered in Scotland, though at least one aquaculture employer based in England has staff on Scottish apprenticeships. The industry in England also uses online courses offered by Scottish providers.



### **Sparsholt College offers**

- Aquaculture and Fishery Management BSc (Hons)
- Marine Ecology and Conservation FdSc,
- Sports Fisheries and Aquaculture Degree FdSc
- Applied Aquaculture and Sports Fisheries MSc alongside various short practical courses for aquaculture.

### **Hadlow College offers**

- Fisheries Management L1, L2, L3 qualifications
- FdSc/ BSc, Fisheries Management.

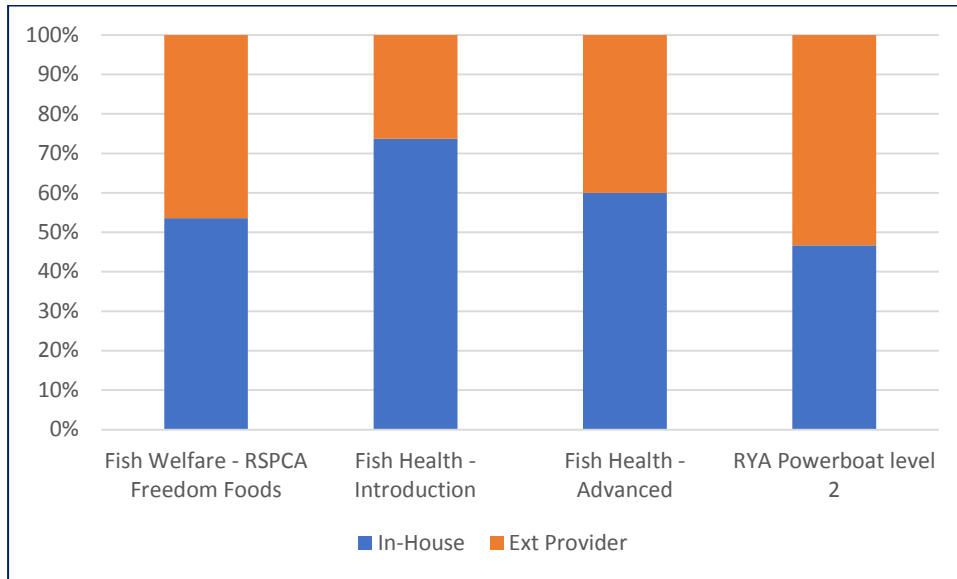
Various providers including South Devon College offer Workboat and RYA Powerboat courses.

Bivalve purification is offered by Seafish and the Southern Shellfish Training Centre. The course is offered periodically. A barrier to running this course is that of assembling large enough cohorts to be economically viable as a course. Seafish is, however, pioneering an innovative online training and assessment solution.

The industry exhibits a pattern of offering most courses on an in-house basis (figure 21), rather than using external providers.

## Skills, Recruitment and Retention in England's Seafood Industry

Figure 21: Percentage of specified courses provided internally and externally in England's aquaculture sector



Source Pye Tait survey 2020

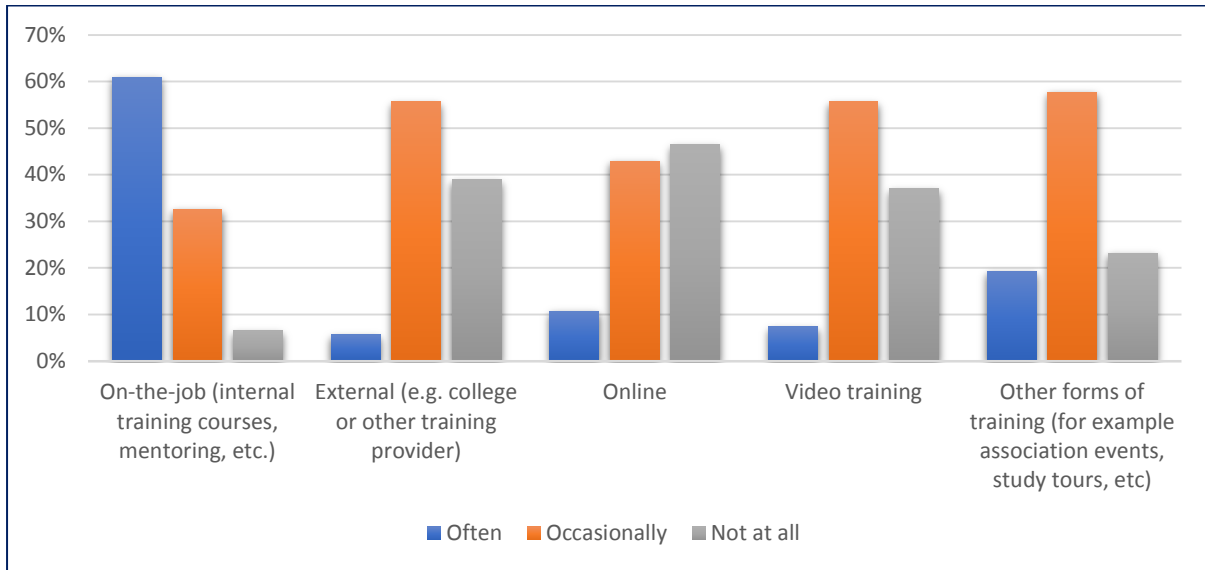
Over 90% of employers approach training either often or always on an in-house basis. Almost four in ten never provide external training but there is strong occasional use of almost all modes of training.

*We generally take on people who can demonstrate practical knowledge and have a little work experience then train in-house.*

**Aquaculture, South East**

# Skills, Recruitment and Retention in England's Seafood Industry

Figure 22: Training approaches in England's aquaculture sector



Source Pye Tait survey 2020

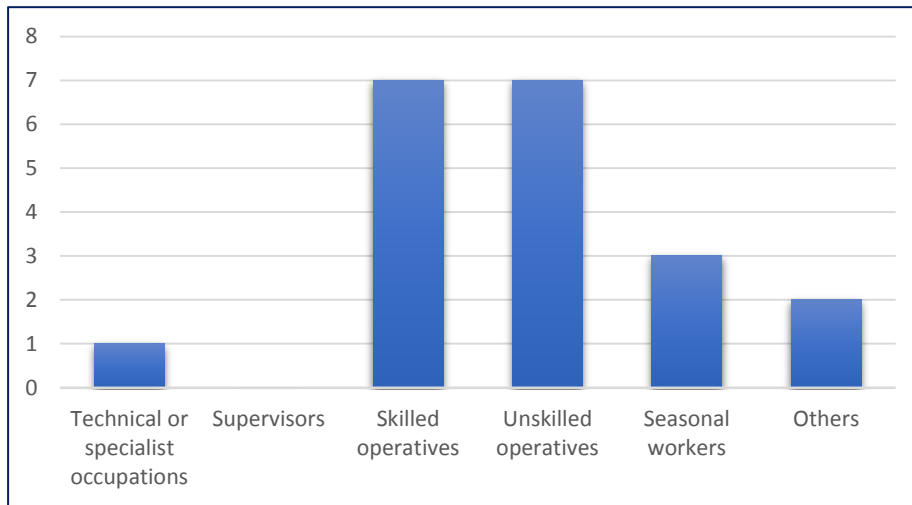
## 6.1.4 Recruitment

Aquaculture employers reported most of their vacancies in the past year were in skilled and unskilled operatives (Figure 23).

The vacancies reported represent just under eight percent of the workforce of the responding employers. This indicates a staff turnover rate considerably lower than the national average of 15%.

## Skills, Recruitment and Retention in England's Seafood Industry

Figure 23: Number of vacancies in 2018-19 in England's aquaculture sector



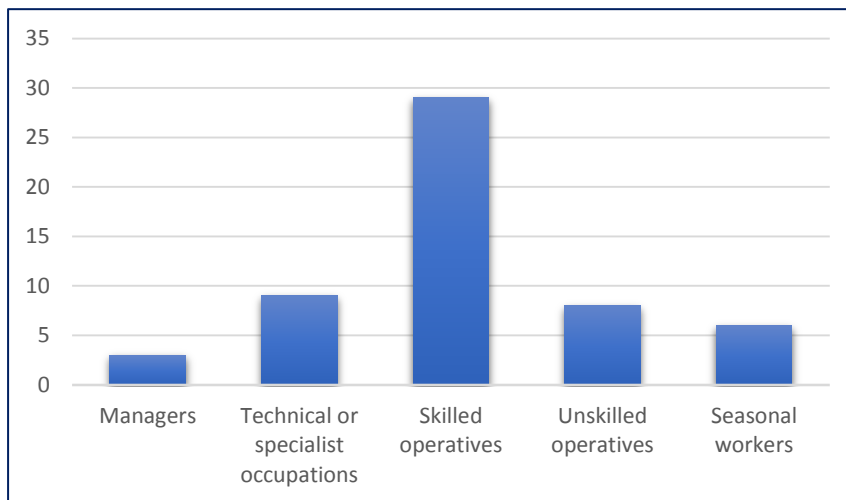
Source Pye Tait survey 2020

The vast majority of vacancies over the past three years have been in the 'Skilled Operative' category. Over 16% of the three-year vacancies have been in technical grades and the total proportion of technical and skilled operative vacancies was almost 70%.

Skilled and technical staff also represented the bulk of hard-to-fill vacancies reported by employers – 69% of all hard-to-fill vacancies. (Figure 25).

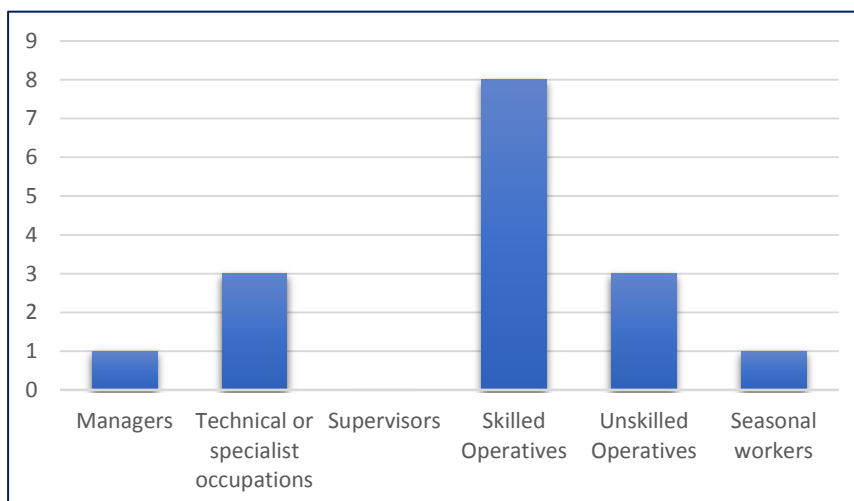
## Skills, Recruitment and Retention in England's Seafood Industry

Figure 24: Number of vacancies over past three years in England's aquaculture sector



Source Pye Tait survey 2020

Figure 25: Number of hard to fill vacancies in England's aquaculture sector



Source Pye Tait survey 2020

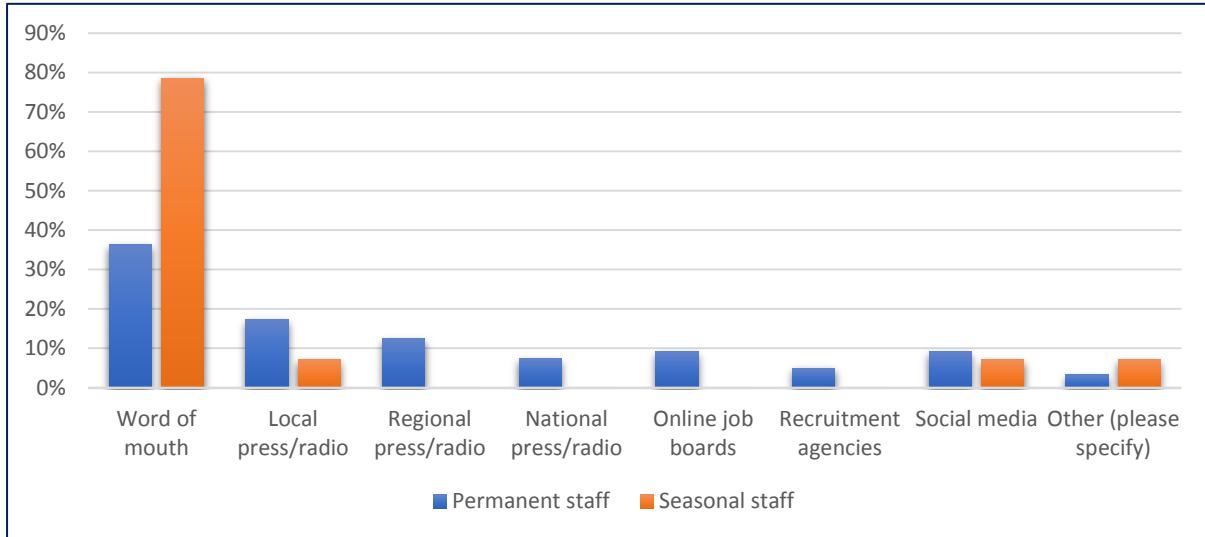
In alignment with what the data demonstrates, aquaculture employers ranked skilled operatives as the role most difficult to fill followed closely by technical staff, managers and unskilled operatives.

Figure 26 shows the main recruitment methods used by aquaculture employers. For employers use a wide variety of methods. Around a third use word of mouth while 17% use press or radio. Around one in ten employers make use of each of regional press, online job and social media. This pattern is reinforced by the picture when it is related to job roles (

## Skills, Recruitment and Retention in England's Seafood Industry

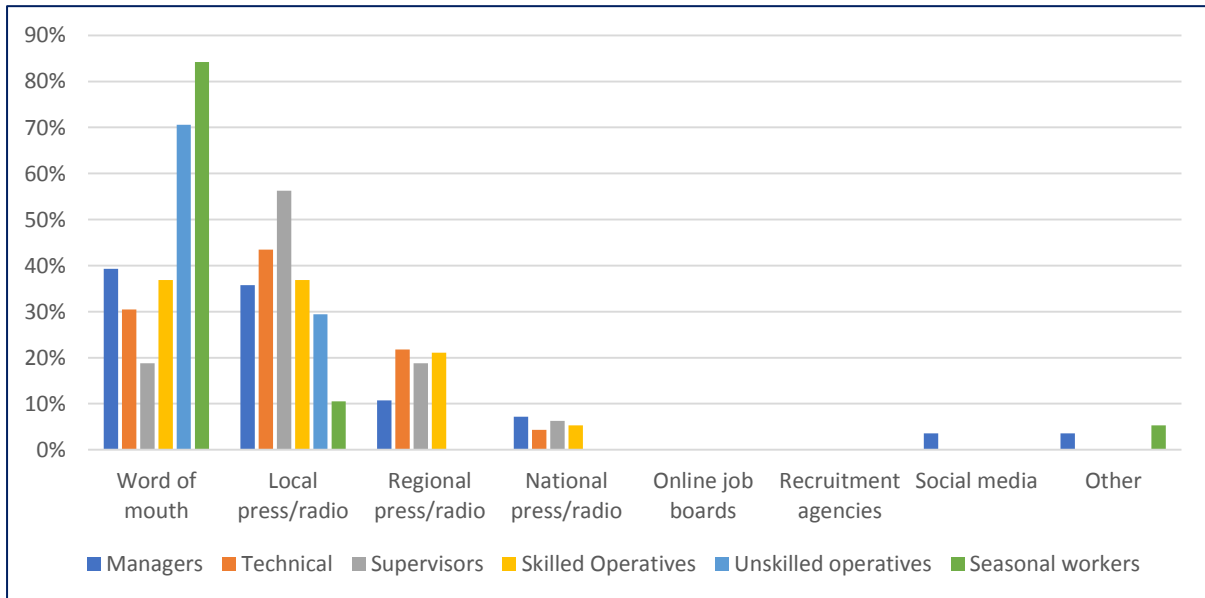
Figure 27). Where seasonal staff are concerned almost 80% of the recruitment is handled by word of mouth.

Figure 26: Recruitment methods used in England's aquaculture sector



Source Pye Tait survey 2020

Figure 27: Recruitment methods used in England's aquaculture sector (by role)

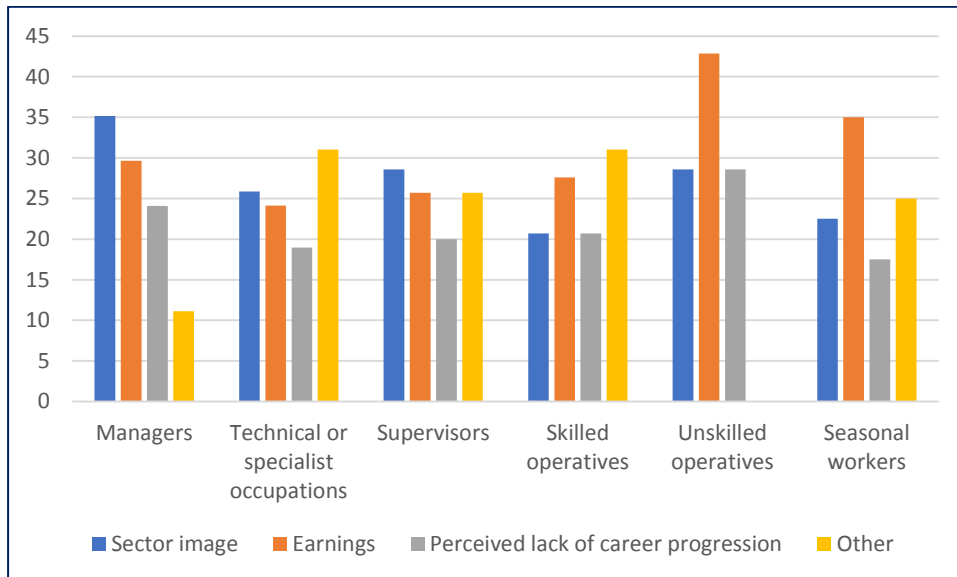


Source Pye Tait survey 2020

## Skills, Recruitment and Retention in England's Seafood Industry

Employers in aquaculture regard what they perceive as a poor sector image as being an important barrier to recruitment for almost all types of staff – particularly for managers, technical staff and supervisors. For unskilled and seasonal staff earnings are regarded as the main barrier

Figure 28: Barriers to recruitment in England's aquaculture sector (by job role %)



Source Pye Tait survey 2020

## 6.2 Catching

### 6.2.1 Introduction

The survey covered fishing enterprises with headquarters in England in the proportions shown in

Figure 29.

The businesses operate over 200 vessels of which the most common size is between 16.6m and 24m and employ around 850 and employ around 850 on those vessels supported by a further 572 ashore (

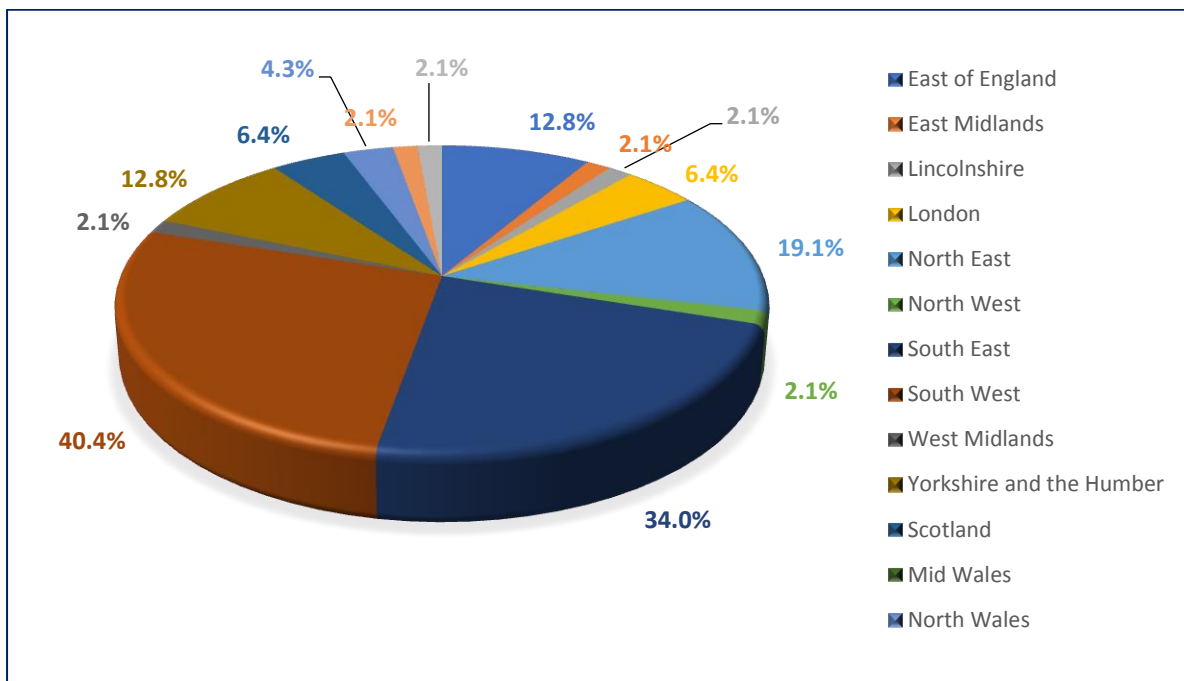
Figure 31).

## Skills, Recruitment and Retention in England's Seafood Industry

Some 98% of the employees are either full-time or part-time permanent staff (Figure 32). Of the onboard staff around 14% are part-time. Some 97% of shore-based workers are permanent full-time employees.

The vast majority of share fishermen are also taken on, on either a permanent or seasonal full time (Figure 33).

Figure 29: Operating regions for catching businesses in England (%) (Businesses operating in Wales are headquartered in England)

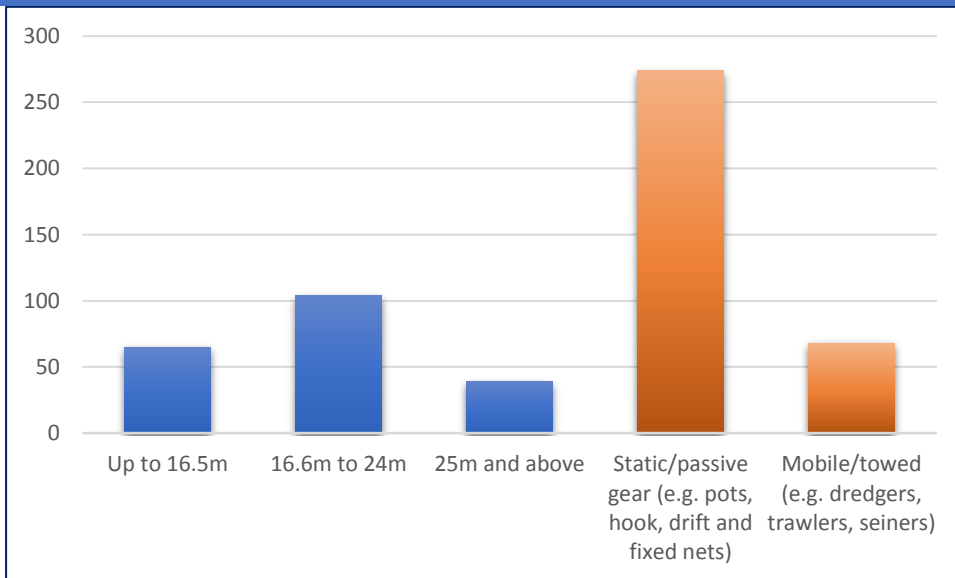


Source Pye Tait survey 2020

Figure 30: Numbers of vessels operated in England's catching sector

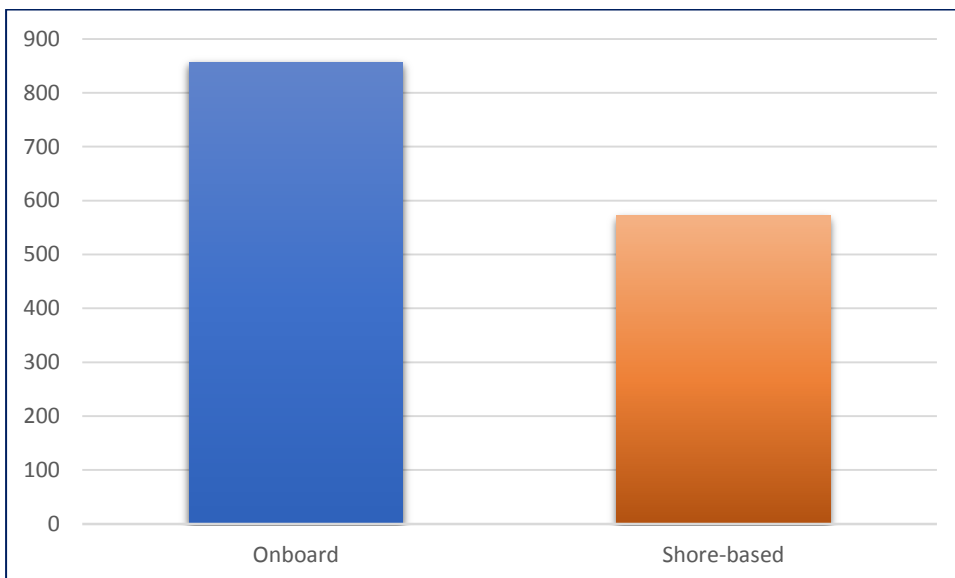


## Skills, Recruitment and Retention in England's Seafood Industry



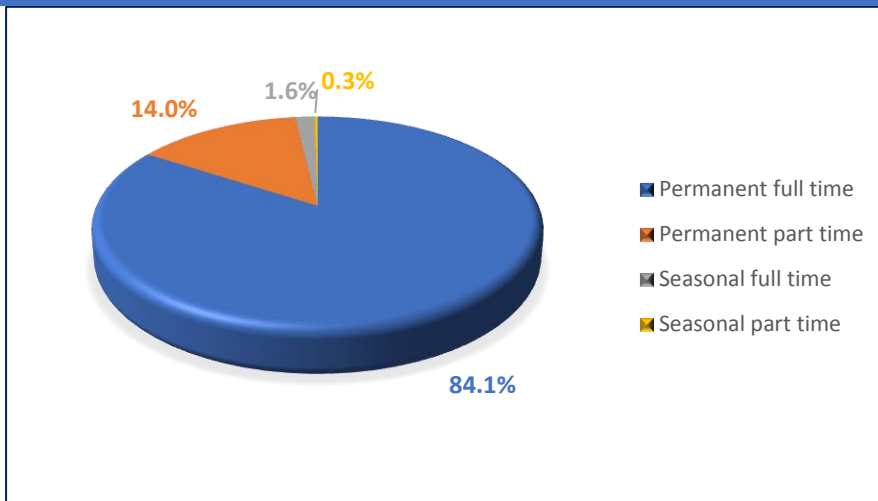
Source Pye Tait survey 2020

Figure 31: Numbers of employees onboard and onshore in England's catching sector



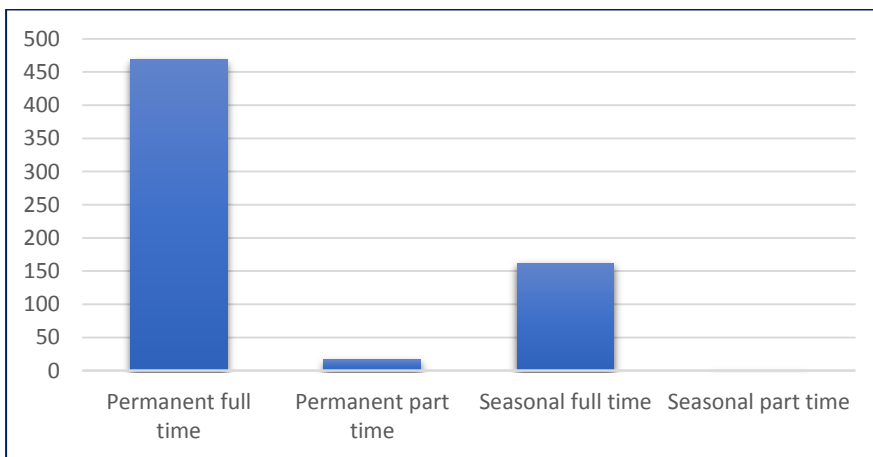
Source Pye Tait survey 2020

Figure 32: Employees by contract type in England's catching sector (%)



Source Pye Tait survey 2020

Figure 33: Number of share fishermen by contract type in England's catching sector

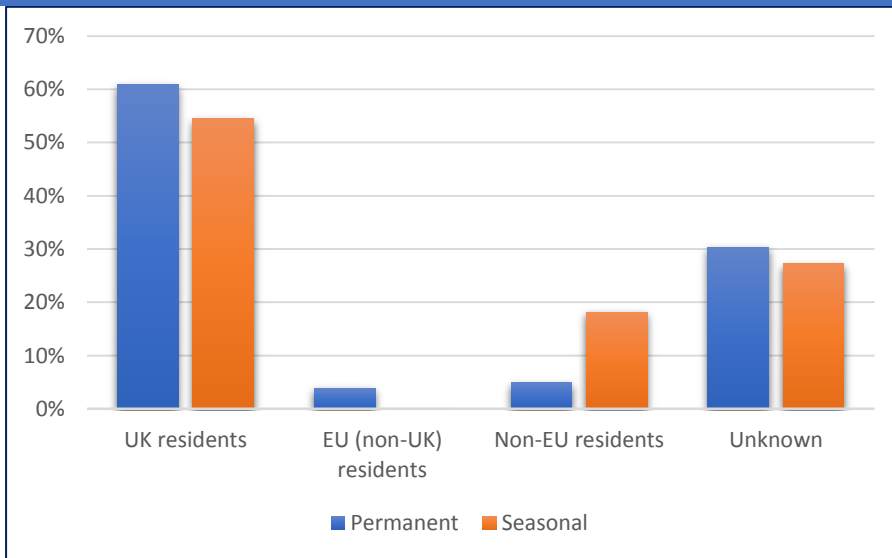


Source Pye Tait survey 2020

Over half of both permanent and seasonal staff are resident in the UK but employers were unable to ascribe a place of residence to around a quarter to a third of their employees (Figure 34).

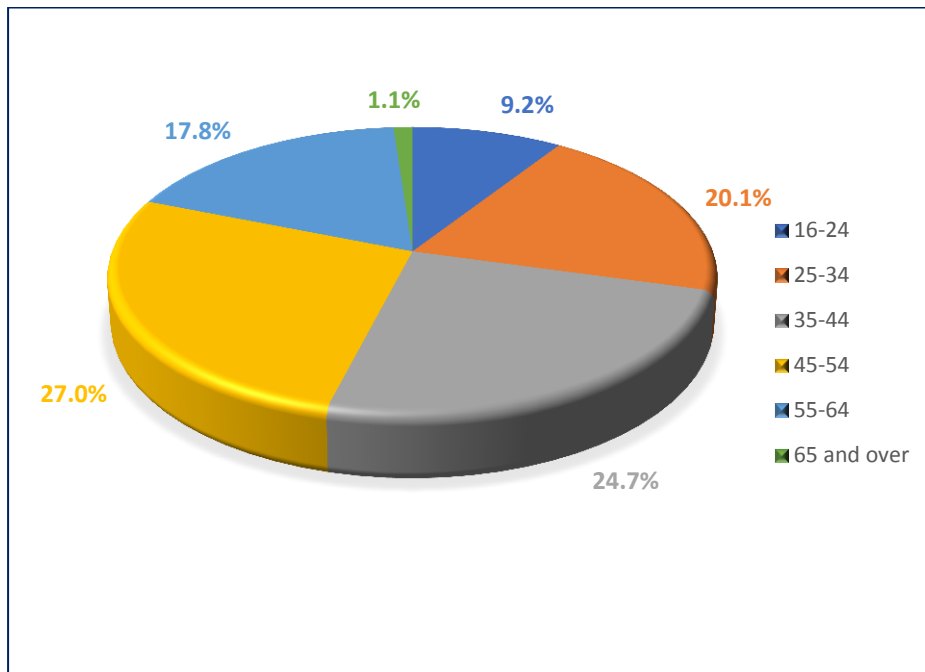
Figure 34: Residence by employment mode in England's catching sector

## Skills, Recruitment and Retention in England's Seafood Industry



Source Pye Tait survey 2020

Figure 35: Catching age profile in England



Source Pye Tait survey 2020

Some 46% of the catching workforce is aged over 45 years (compared to around 43% of the UK workforce). Just under 30% are aged under 35.

## 6.2.2 Skills

The question of skill level in the fishing industry is fraught with difficulties. These are mainly based on the fact that most people in the sector do not have formal qualifications but instead possess a series of mandatory certificates and additional training.

These difficulties are made more intractable by the fact that the industry has traditionally been regarded as relatively unskilled – particularly with respect to deckhands who are often seen by lay-people as labourers.

Skippers, engineers and mates are generally regarded as level 3 roles and deckhands as being, at most, at level 2. The industry has adapted and adopted – partly through Government regulation – a number of approaches but all are founded on four basic courses and certificates:

## Skills, Recruitment and Retention in England's Seafood Industry

- Basic Sea Survival
- Basic Firefighting and Prevention
- Basic First Aid
- Basic Health and Safety

Skippers, mates and engineers may then have to obtain certain “Certificates of Competence” for deck officers and engineering officers – depending on their role and the size of vessel.

The Maritime Skills Alliance (MSA) provides a summary of apprenticeships available in sea fishing which states that there is no apprenticeship currently available in England, Wales, or Northern Ireland although the NAFC Marine Centre (part of the University of the Highlands and Islands) offers apprenticeships in Scotland. Level 4 courses exist for senior seafarers in areas such as medical care, management and operations but most of the courses listed on the comprehensive site are at Levels 2 and 3.

The problem for the industry is that – whereas in other economic sectors – job roles can generally be categorised at a specific RQF level, there is no overarching qualification which grants a level to a specific job role in the catching sector. Job holders tend to acquire a set of certificates and qualifications. An “electrician” for example undertakes a single course of study – usually through an apprenticeship at Level 3 – which imparts all of the knowledge and skill they will require to begin competent work. In this sense an electrician begins work at Level 3 and the role is regarded as a “Level 3” job (at least in the first instance).

Sea fishermen on the other hand collect a series of specific certificates each of which may be rated according to the RQF at Level 1, 2, 3, or 4.

The extreme difficulty of attaching a “level” to a sea-fishing role presents no day to day issues for the sector but it does have ramifications in two important areas: firstly where immigration regulations are concerned (in which Level 3 acquires a special significance), and secondly for the overall status and career-attractiveness of the sector.

A further consideration for the level of a job role is the element of multi-skilling involved. Skippers, for example, may have a collection of certificates which individually are considered to be at level 2, 3 or 4, but the overall job role involves the deployment of numerous skills and deep and extensive underpinning knowledge which almost certainly places the role above those levels in practice.

Deckhands, while often seen as labourers and unskilled operatives, carry out a multi-skilled job role in which knowledge and skill have to be displayed over a wide range of tasks including net handling, engine management, fish identification and selection, machinery and equipment management, team working, navigation, safety management, fish processing and packing and much else.

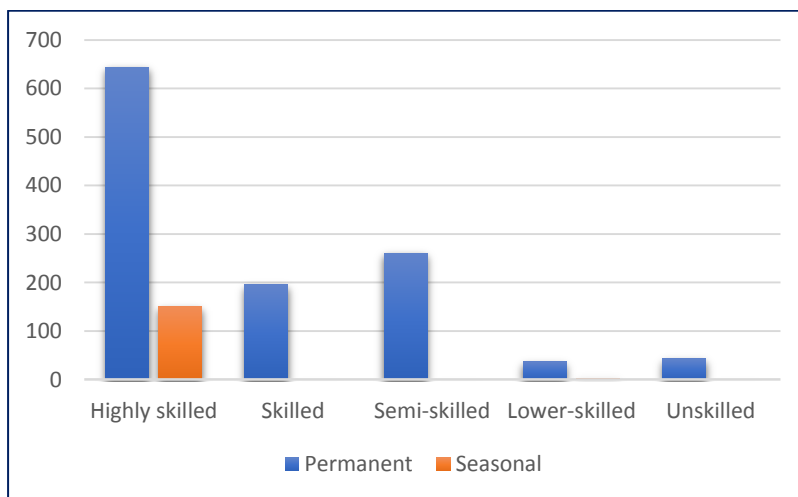
## Skills, Recruitment and Retention in England's Seafood Industry

The results of our survey should be read in the light of these considerations. They may offer insights, for example, into why employers in the sector regard their employees as being “highly skilled” as in [Figure 36: Staff numbers by skill level/contract type](#).

The following chart illustrates the main reasons that employers in the catching sector believe are responsible for skills gaps in their workforces; headed by perceived problems in external training, a lack of apprenticeships, the problem of travel to training, and an unwillingness among employees to undertake external training.

The latter is an issue in many UK sectors and is often related to the basic educational level of the member of staff. Many people regard themselves (and possibly are justified in doing so) as “practical people” and not “academics”. They have an inbuilt fear of, or antipathy to, what they see as “classroom education”. People may be perfectly competent in their basic role but may have limited numeracy and literacy skills and may have been “traumatised” by their early educational experiences. These types of issues may well lie behind some of the unwillingness to undertake external training.

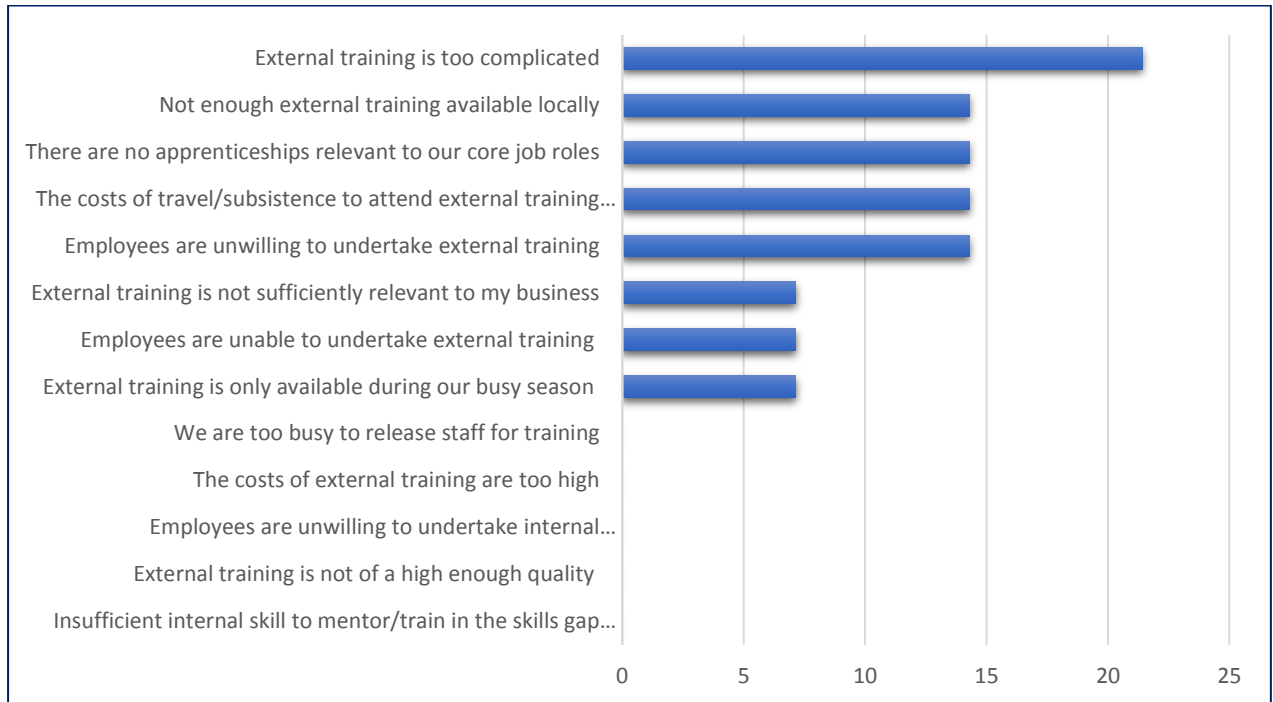
*Figure 36: Staff numbers by skill level/contract type in England's catching sector*



*Source Pye Tait survey 2020*

## Skills, Recruitment and Retention in England's Seafood Industry

Figure 37: Reasons for skills gaps in England's catching sector



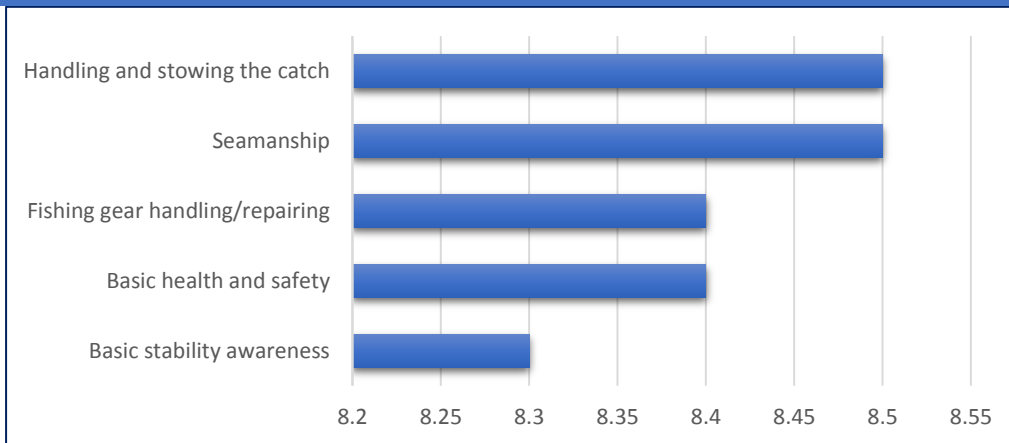
Source Pye Tait survey 2020

Employers regard their operative staff as being well skilled (scores of over 8 out of ten) in the key catching skill areas (Figure 38) and see the future demand for those skills increasing (

Figure 39).

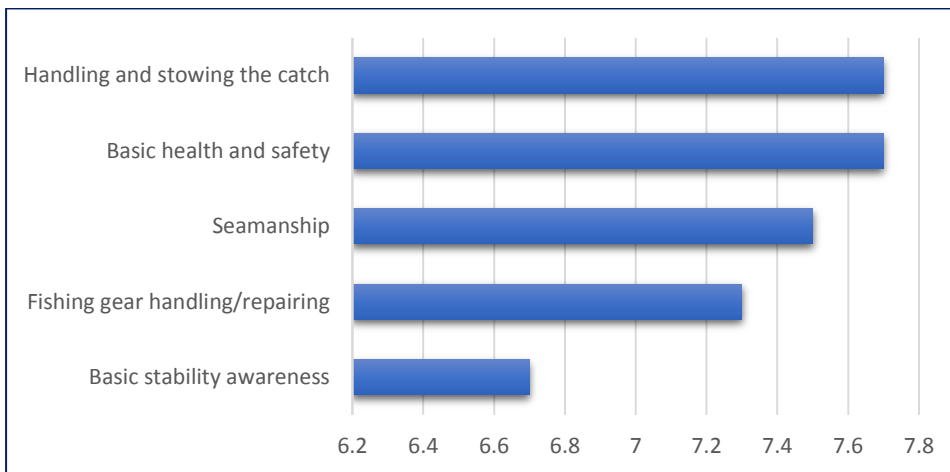
Figure 38: Current skills among operative staff in England's catching sector

## Skills, Recruitment and Retention in England's Seafood Industry



Source Pye Tait survey 2020

Figure 39: Future demand for English catching skills



Source Pye Tait survey 2020

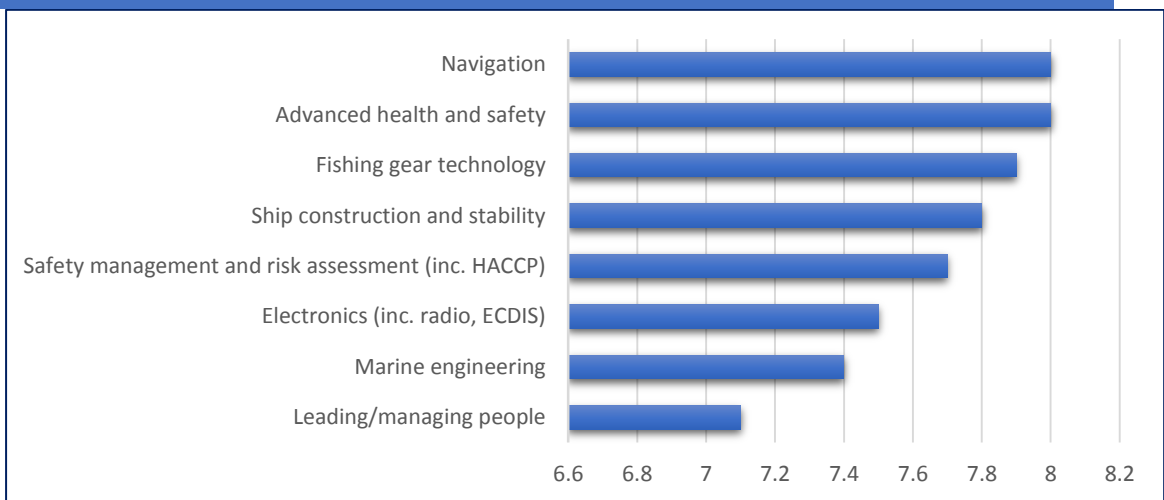
Where mates and skippers are concerned employers are slightly less sanguine about current skill levels with only advanced safety and navigation scoring eight out of ten. Although the other listed skills are regarded as being at a fair to good standard, several such as electronics, marine engineering, and leading people attract lower scores (

Figure 40).

Figure 40: Current skills for mates and skippers in England's catching sector



## Skills, Recruitment and Retention in England's Seafood Industry

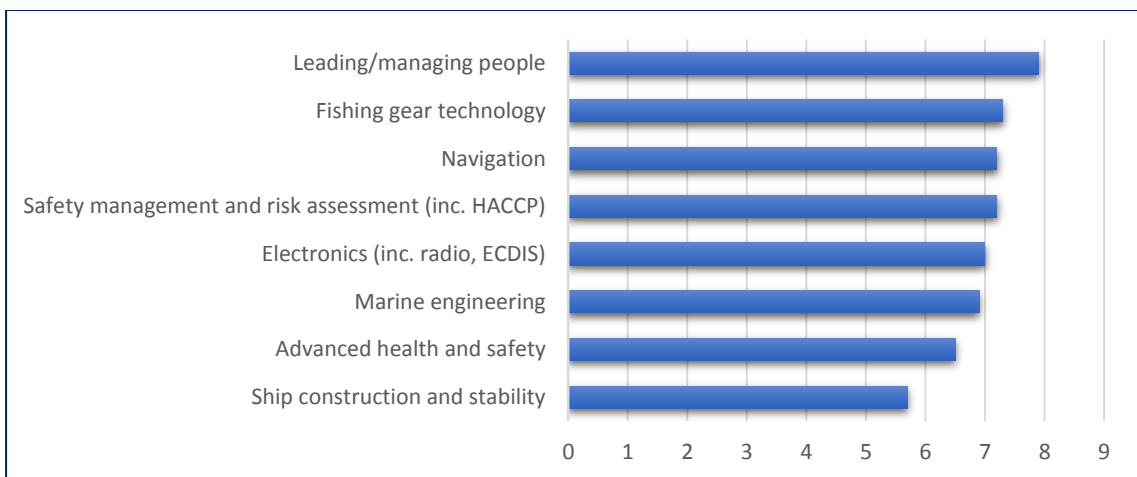


Source Pye Tait survey 2020

*The demand for these skills in the future reflects the employers' appreciation of current skills by placing areas such as navigation, leading people, gear technology, and electronics among the higher scoring areas (scoring areas (*

Figure 41).

Figure 41: Future skills demand for mates and skippers' in England's catching sector



Source Pye Tait survey 2020

### 6.2.3 Training

## Skills, Recruitment and Retention in England's Seafood Industry

Broadly speaking there are around twenty Seafish-approved training providers who are usually individual specialists. For off-shore training there are eight approved providers most of which are larger organisations nearly all of which offer a full suite of compulsory training courses.

In total there are around 250 courses available across England, in centres such as Whitby, Lyme Regis, the Isle of Wight, Cornwall, and so on (**Error! Reference source not found.**).

Table 3: Training available for England's catching sector

Broad Subject Area	Number of courses
Health & Safety	37
Survival/rescue	28
Fire Fighting	26
First Aid	25
Stability/Stability Awareness	23
Watchkeeping/bridgewatch	21
Radio/GMDSS (Global Maritime Distress and Safety System)	18
Engine/engineering	12
Navigation (see NAEST below)	6
Food Safety	6
Skipper/Yacht Master	6
Radar/instruments (all are radar courses)	4
Security	4
EDH (Efficient Deck Hand)	2
ROV (Remotely Operated Vehicle)	2
STCW (*) Electronic Chart Display & Info System	2
Superyacht Crew Training	1
STCW (*) Crisis Management & Human Behaviour	1
Train the Trainer	1
MCO (Master Course Outline) Oral Exam Prep	1
Navigation Aids and Equipment Simulator Training (NAEST)	1
HELM (Human Element and Leadership Management)	1
MCA (Maritime and Coastguard Agency) Approved Entry: enclosed spaces	1
RYA (Royal Yachting Association) Powerboat level 1	1

(\*) Standards of Training, Certification and Watchkeeping

Source Pye Tait 2020

As discussed above, training consists of a series of basic mandatory courses, Certificate of Competence courses, and a variety of additional provision.

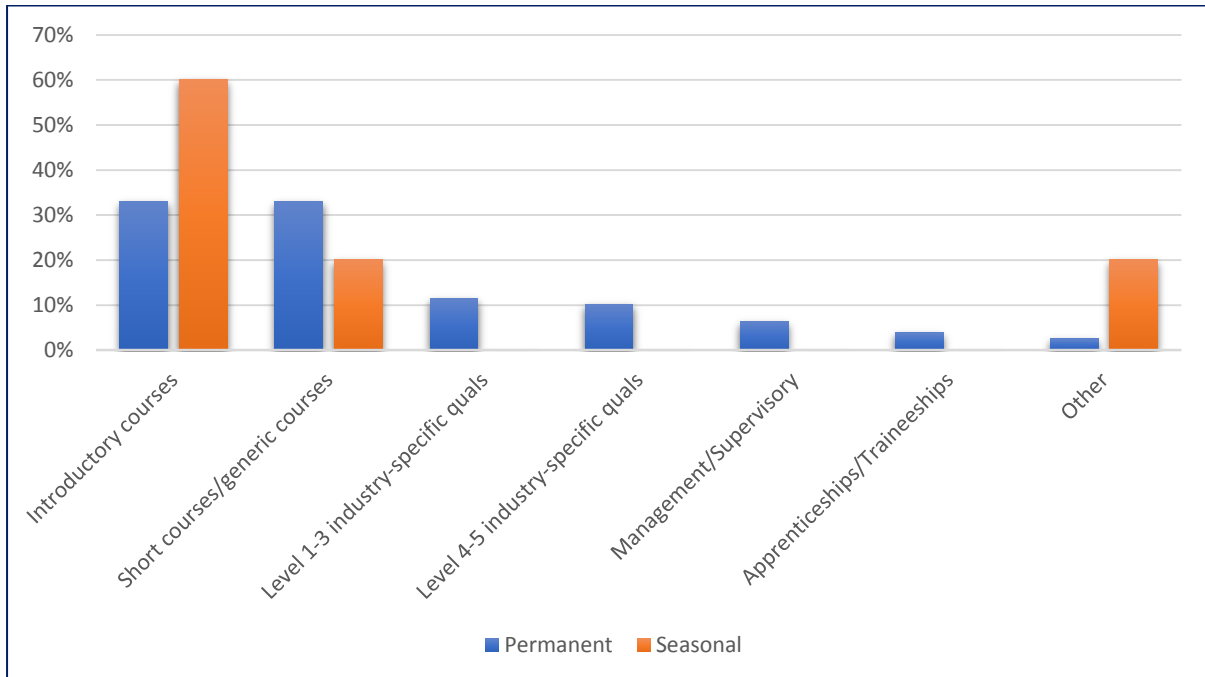
For new entrants, for example, Seafish offers a three-day *Introduction to Commercial Fishing (ICF)* course which is designed for anyone interested in a career in the fishing industry. The Whitby & District Fishing Industry Training School offers a Level 2 Diploma in Maritime Studies (Sea Fishing

## Skills, Recruitment and Retention in England's Seafood Industry

Pathway) but there is as yet no apprenticeship for the sector in England. Stakeholders highlight difficulties in providing an apprenticeship, in that apprentices have to be employed and employment (rather than share-fishing) of crew on fishing vessels is not common practice. Employers gave a number of courses undertaken – with most focused at the introductory and short-course end of the scale (Figure 42).

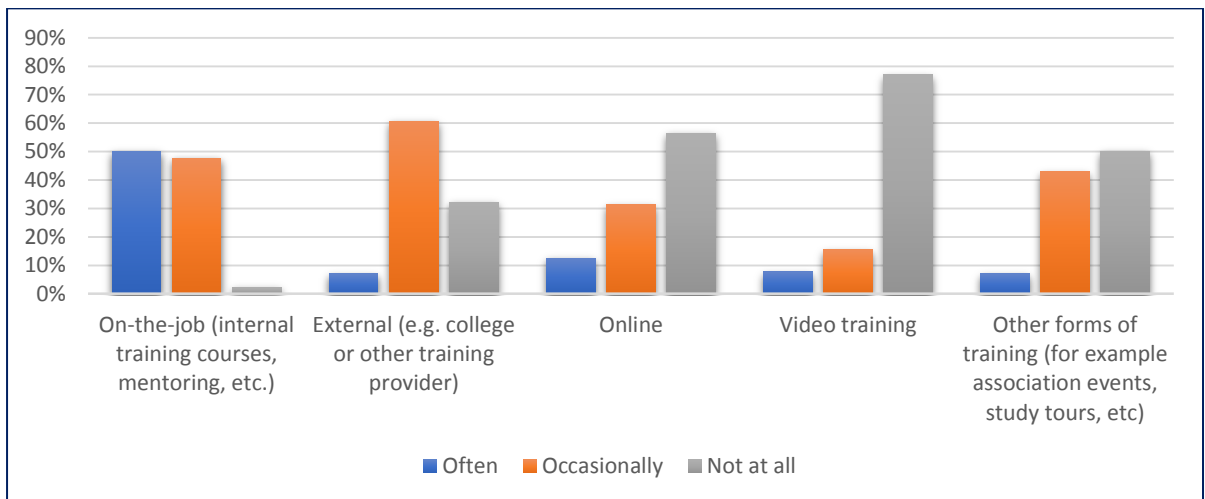
# Skills, Recruitment and Retention in England's Seafood Industry

Figure 42: Courses undertaken in England's catching sector



Source Pye Tait survey 2020

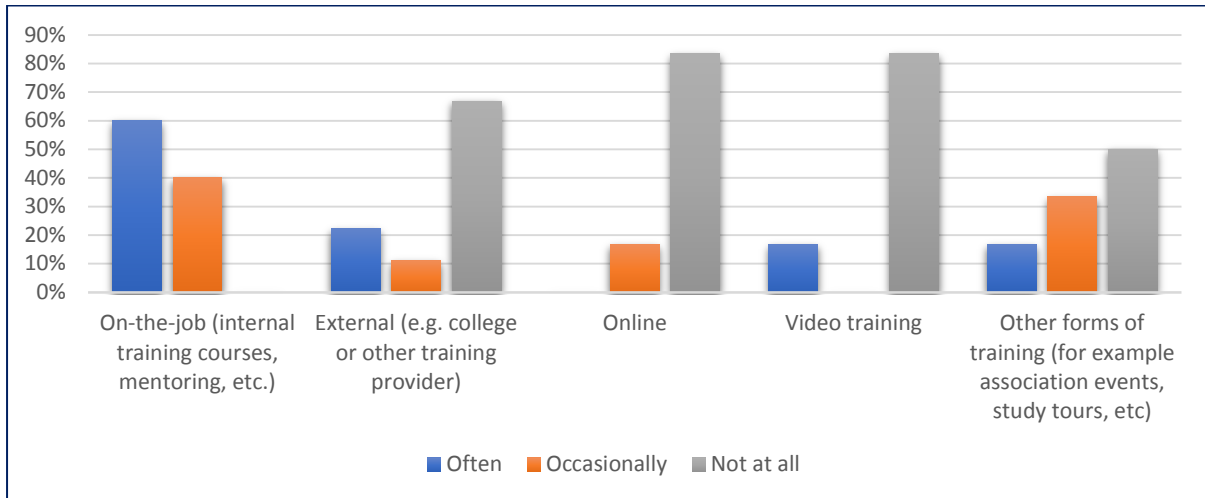
Figure 43: Training approaches used for permanent staff in England's catching sector



Source Pye Tait survey 2020

# Skills, Recruitment and Retention in England's Seafood Industry

Figure 44: Training approaches used for seasonal staff in England's catching sector



Source Pye Tait survey 2020

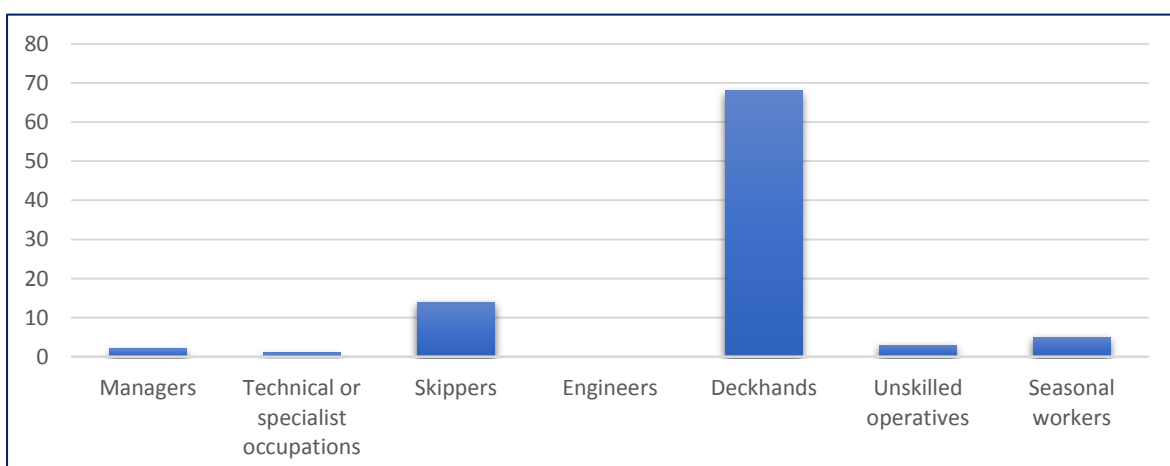
## 6.2.4 Recruitment

The vast majority of vacancies in the past year have been for deckhands – around three-quarters of all vacancies.

The 93 vacancies reported represent around 6.5% of the 1,429 staff reported for the survey but 82 of these were for onboard employees (an average turnover of 9.6% (of the 857 onboard staff) which is still considerably below the national average of around 15%.

Over the past three years the surveyed businesses have had to recruit 105 deckhands and 35 skippers.

Figure 45: Number of vacancies in past year in England's catching sector



Source Pye Tait survey 2020

## Skills, Recruitment and Retention in England's Seafood Industry

Skippers and deckhands also represent the hardest to fill vacancies for the sector with jobs for 20 skippers and 17 deckhands taking more than three months to fill. These represent almost 60% of all skipper vacancies over the past three years. Hard to fill deckhand vacancies on the other hand represent just 16% of the three-year requirement.

Much of the shortfall in deckhand recruitment has been made up by recruiting foreign workers. Employers spoke of employing Filipino deckhands, who arrive having completed mandatory training, and are often experienced and highly skilled in other areas of the deckhand role.

*We have Filipino deckhands stowing shellfish. These guys are all experienced in sea survival and sea fishing. We don't take on trainees from schools or colleges.*

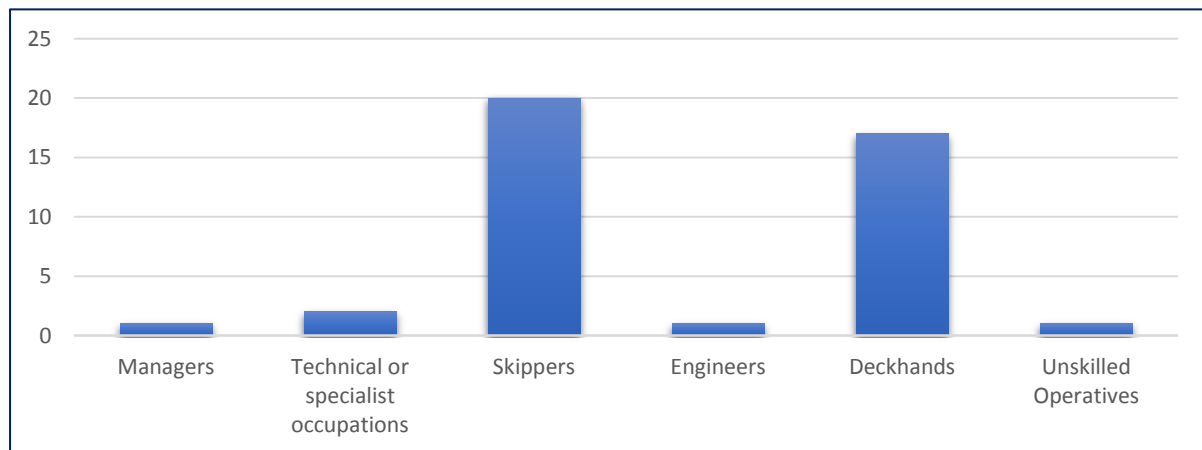
### **Catcher, North East**

But there is a suggestion that employing non-UK crew has led to problems with succession into more senior roles.

*The limited influx of people brings various problems, and this has been overcome in part by bringing in non-UK resident workers. This has also brought problems as they tend to have limited or no ambition or desire to progress – they simply want to earn their money and go home again. This has led to a shortfall in experienced and senior staff.*

### **Catcher, South West**

Figure 46: Hard to fill vacancies in England's catching sector

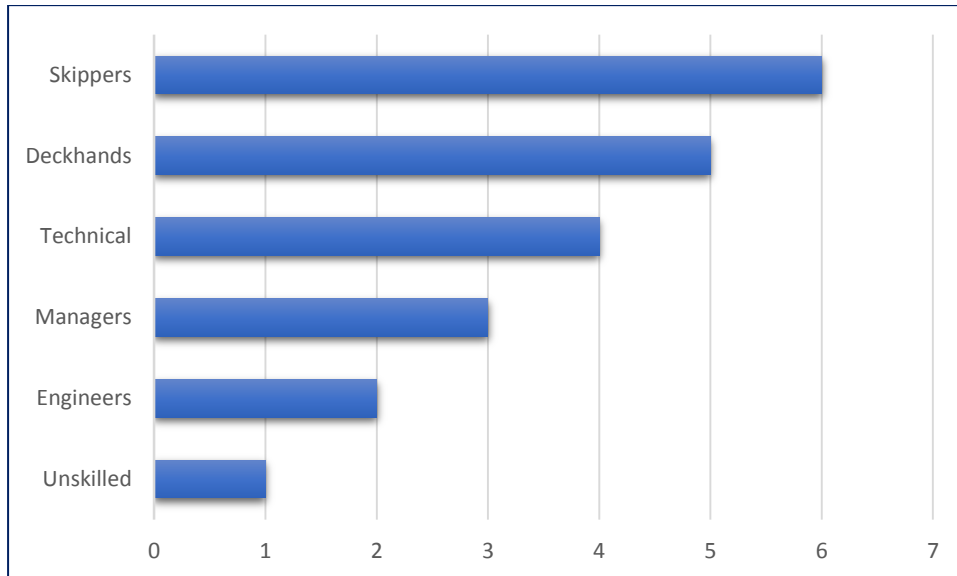


Source Pye Tait survey 2020

## Skills, Recruitment and Retention in England's Seafood Industry

By inverting the scores given to hard to fill vacancies in the survey we can confirm the difficulty of filling skipper and deckhand positions. Technical staff, managers and engineers are ranked next.

Figure 47: Inverse ranking of hard to fill vacancies in England's catching sector



Source Pye Tait survey 2020

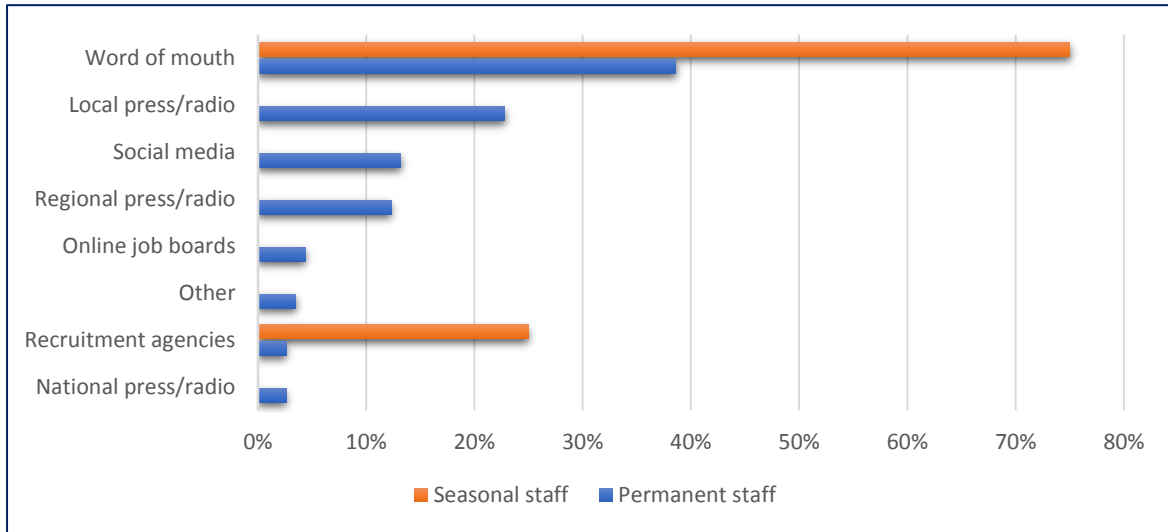
Word of mouth is used for three-quarters of seasonal staff recruitment (agencies account for the remaining quarter). Where permanent staff are concerned word of mouth is important (about 39%) but most other recruitment methods are used to varying extents, with social media taking a reasonably high position.

When social media is used for recruitment it is usually Facebook. Fishermen are very active on Facebook. Sites used for recruitment include 'UK Trawlermen crew available' with over 4,000 members and 'UK fishing crew database' with over 900 members.

However, word of mouth is regarded by employers as by far the most effective form of recruitment for all types of staff.

# Skills, Recruitment and Retention in England's Seafood Industry

Figure 48: Methods of recruitment in England's catching sector

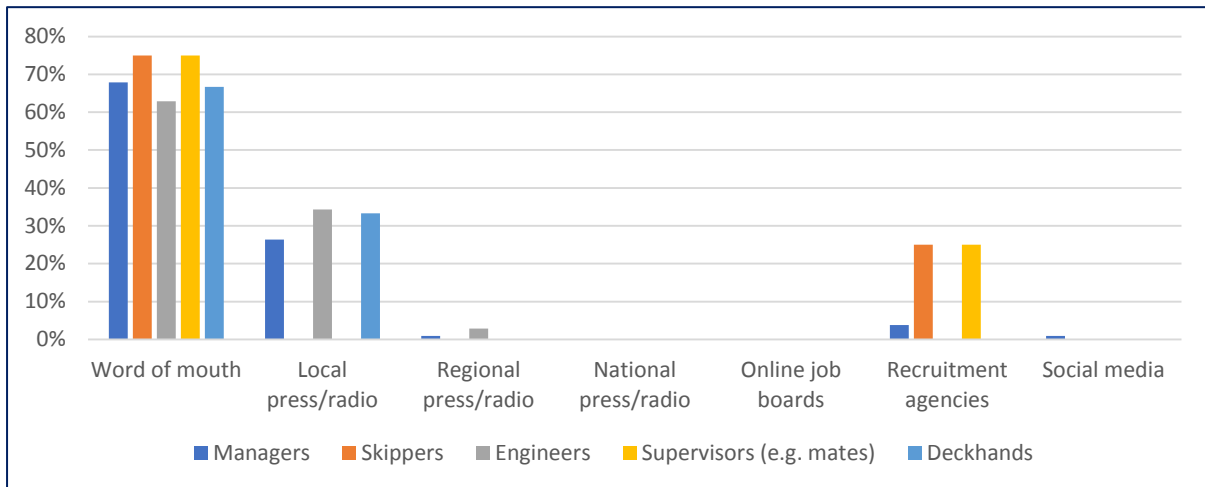


Source Pye Tait survey 2020



## Skills, Recruitment and Retention in England's Seafood Industry

Figure 49: Most effective recruitment approaches in England's catching sector



Source Pye Tait survey 2020

The main barriers to recruitment vary by type of staff. For managers and supervisors the main barriers are seen as being earnings and a perceived lack of career progression but the latter seems to be a major factor for all types of employee.

*When the money is there it is good and highly profitable, however, there is not so much buzz around the industry – they are no longer shouting about how good it can be.*

**Boat Owner, South West**

One stakeholder pointed to structural problems in the industry, inhibiting progression, suggesting that young people would find it difficult to progress to being boat owners due to any financial returns being outweighed by the costs of buying a boat and difficulties acquiring quota.

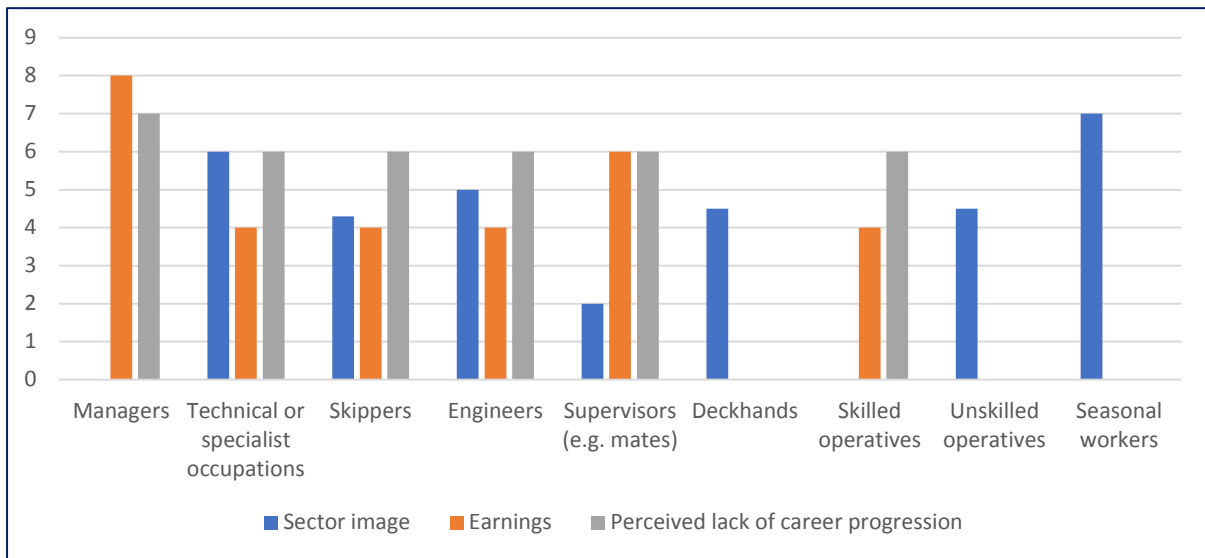
Stakeholders also mentioned some skippers having such extreme difficulties recruiting crew that they have changed the type of fishing they do, so they can work with fewer crew or solo. They went on to suggest that coastal depopulation and the high cost of living in tourist areas contribute to recruitment difficulties.

*For technical and specialist workers the sector's image is seen to be an important barrier (*

# Skills, Recruitment and Retention in England's Seafood Industry

Figure 50).

Figure 50: Barriers to recruitment by job role in England's catching sector (scores)



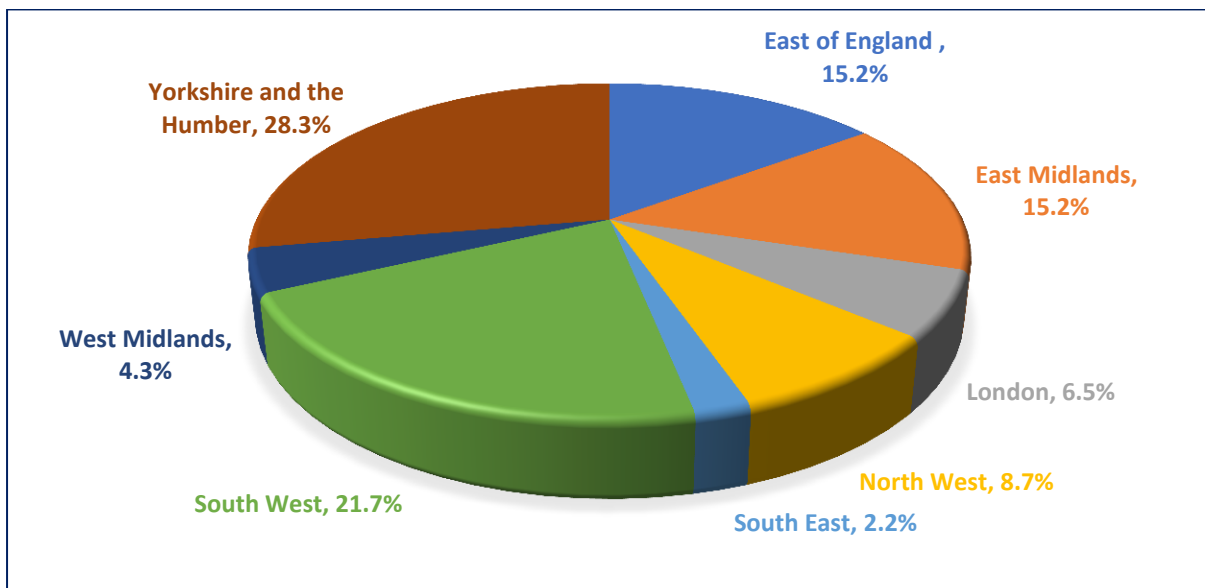
Source Pye Tait survey 2020

## 6.3 Fish frier

### 6.3.1 Introduction

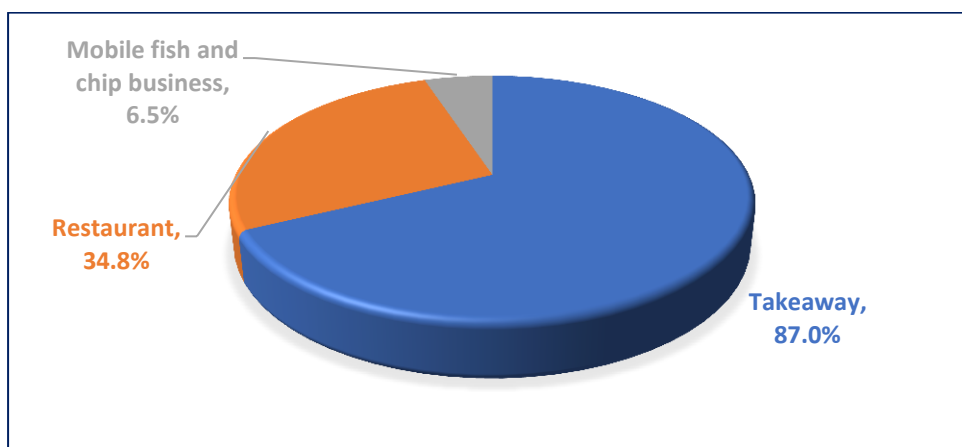
The provision of fried fish (and chips) in the UK is a major food and drink enterprise employing upwards of 60,000 people in some 8,000 businesses. Most of the companies are micro or small. For the survey we were able to contact and interview 47 fish frier businesses during the Covid-19 lockdown. Locations of these businesses are shown in Figure 51. Almost nine in ten of the surveyed businesses were take-aways and a further 6% were mobile enterprises (Figure 52).

Figure 51: Location of fish frier businesses surveyed in England



Source Pye Tait survey 2020

Figure 52: Type of fish frier business surveyed in England



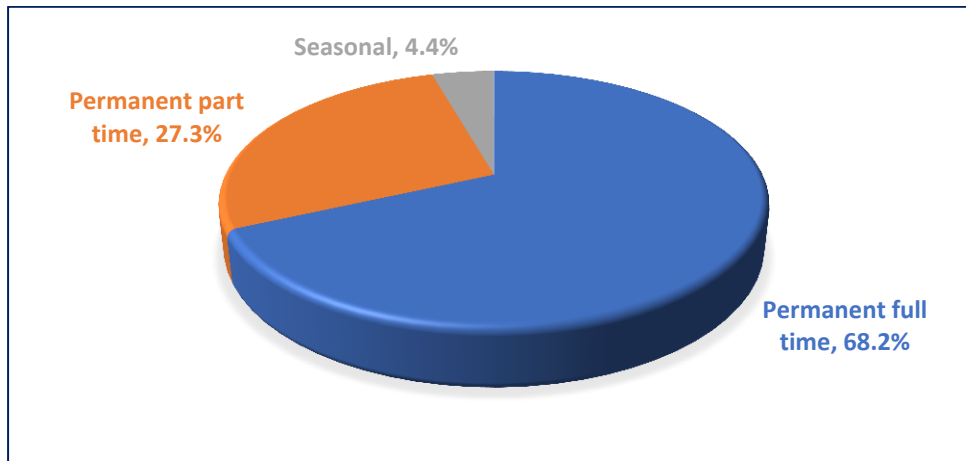
Source Pye Tait survey 2020

## Skills, Recruitment and Retention in England's Seafood Industry

Just under 70% of staff are employed on a full-time permanent basis with just under a third being part-time.

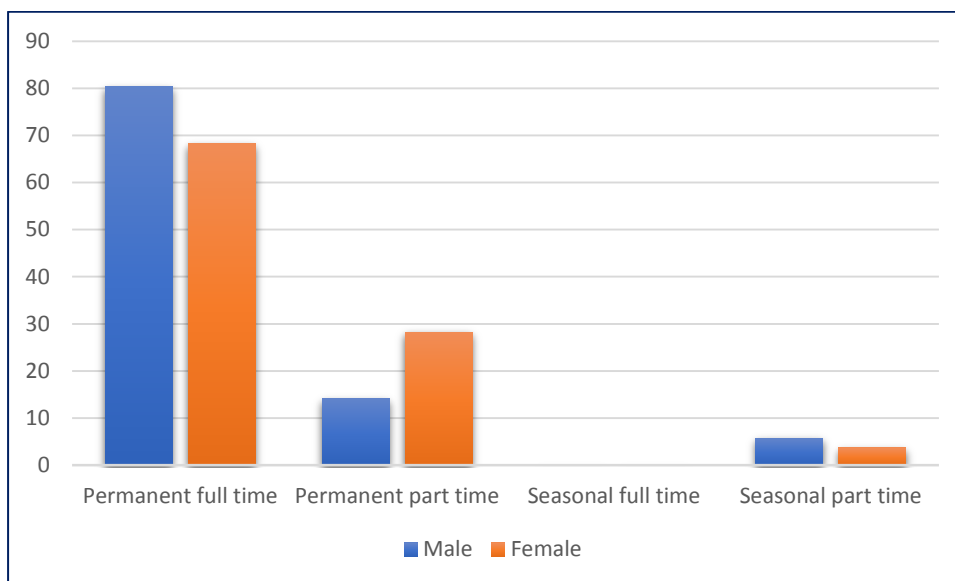
Some 80% of males in the industry are employed on a full time, permanent basis compared to just under 70% of females (Figure 54).

Figure 53: Employment mode in England's fish frier sector



Source Pye Tait survey 2020

Figure 54: Employment mode by gender in England's fish frier sector

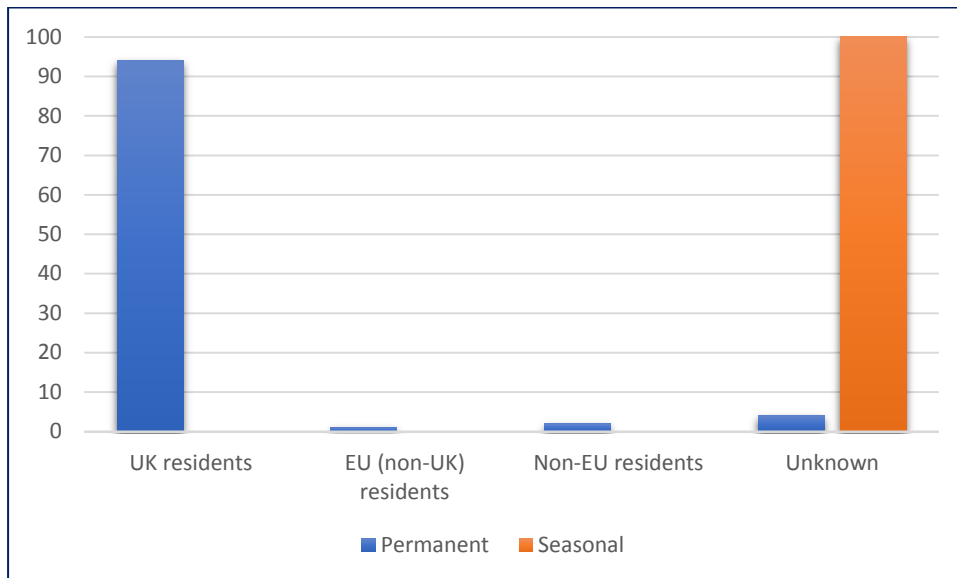


Source Pye Tait survey 2020

Nine out of ten staff are UK residents but the origin of the small proportion of seasonal staff is unknown.

## Skills, Recruitment and Retention in England's Seafood Industry

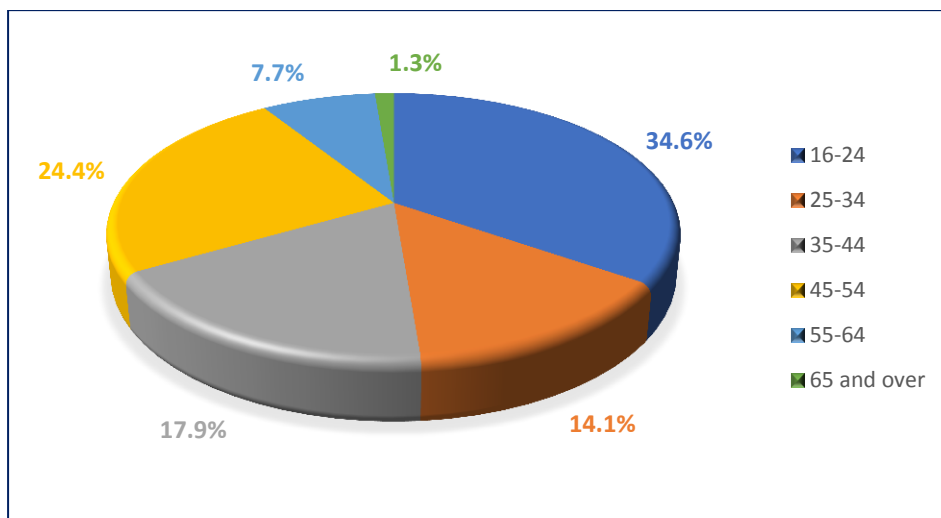
Figure 55: Residence of fish frier sector in England



Source Pye Tait survey 2020

The industry as surveyed exhibits an age profile which is 33.4% over the age of 45 years and 48.7% under 35. A relatively young age profile compared to the national average.

Figure 56: Fish frier age profile in England



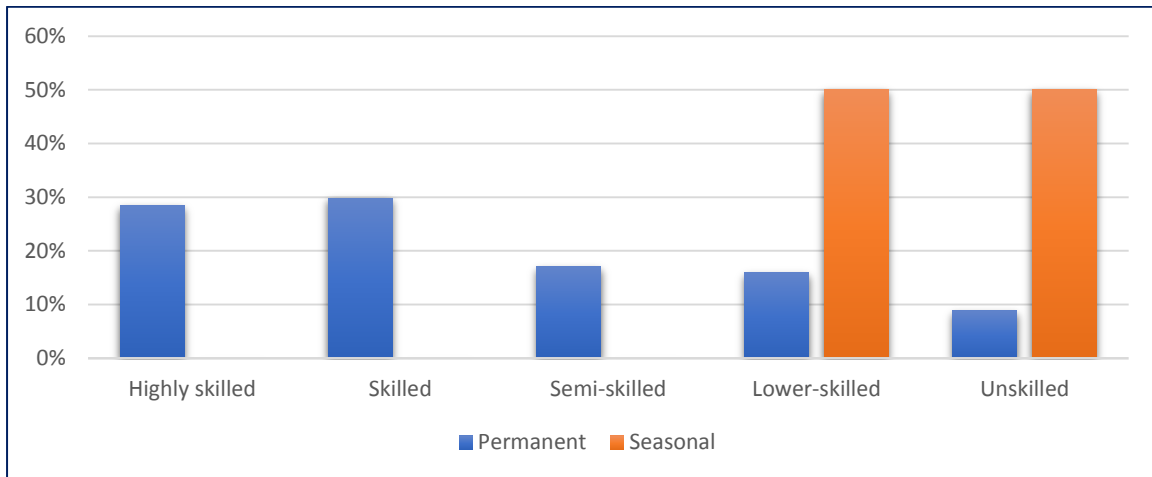
Source Pye Tait survey 2020

## Skills, Recruitment and Retention in England's Seafood Industry

### 6.3.2 Skills

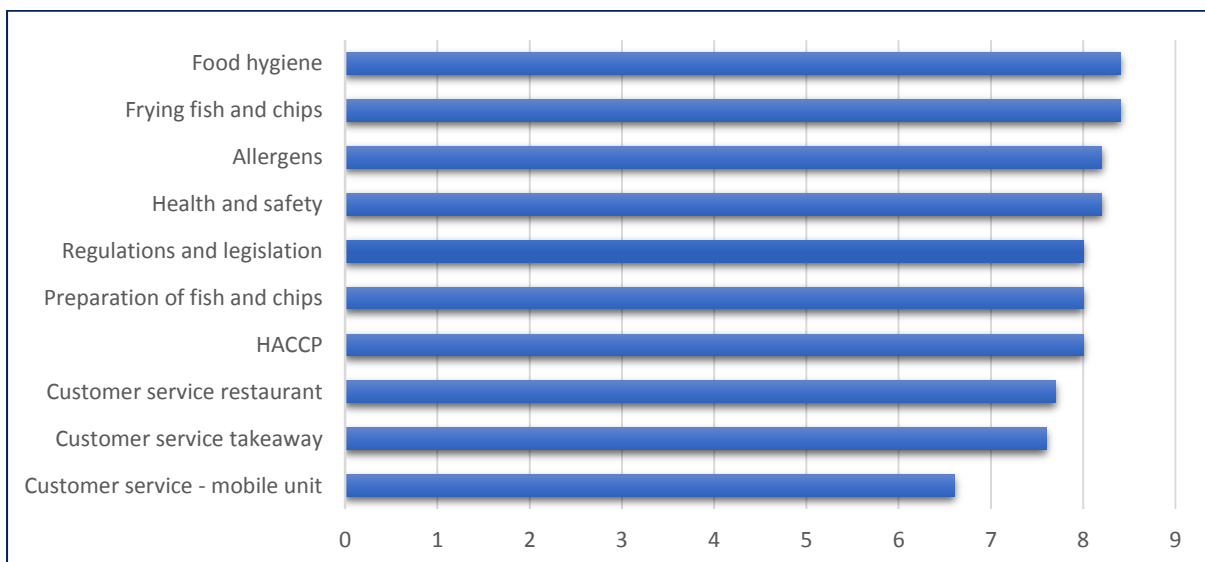
Employers in the fish frier sector regard just over a quarter of their staff as being highly skilled and around a third as "skilled". The remaining 38% of the permanent workforce is seen as being semi-skilled, lower skilled or unskilled.

Figure 57: Staff by skill level in England's fish frier sector



Source Pye Tait survey 2020

Figure 58: Current skill level in England's fish frier sector



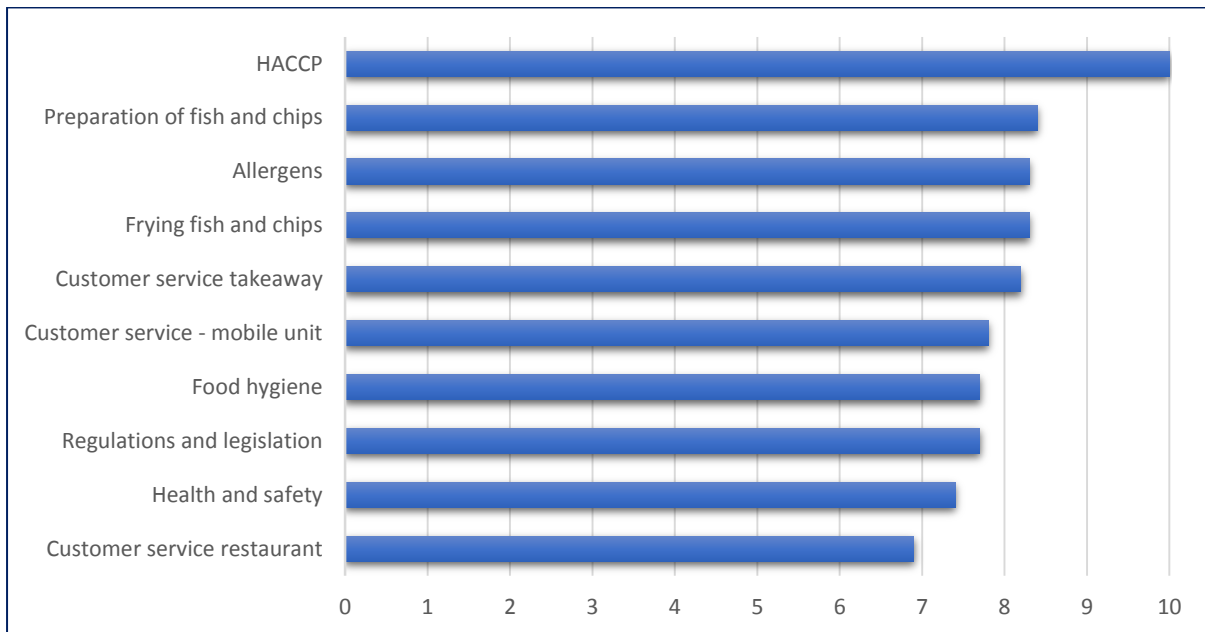
Source Pye Tait survey 2020

## Skills, Recruitment and Retention in England's Seafood Industry

Employers regard their current operative workforces as being good to very good in skill terms. All skills scored over 7 with the sole exception of customer service (restaurant) which scored just under that boundary.

HACCP is considered to be the most in-demand skill for the future of the sector but all of the listed skills scored over five – that is employers believe that the demand for these skills will increase.

Figure 59: Future demand for English fish frier skills



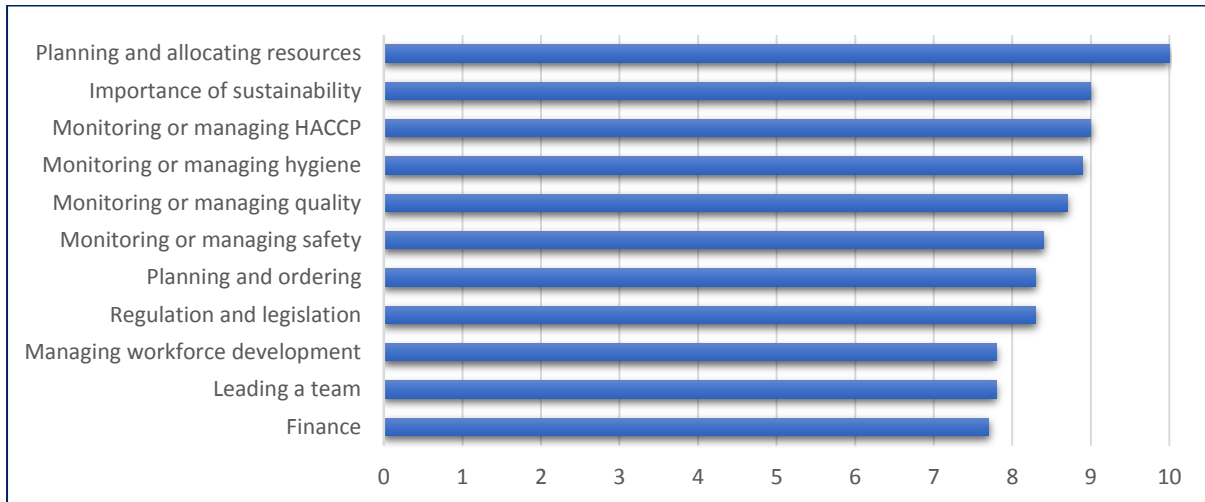
Source Pye Tait survey 2020

Almost all of the current skills of supervisors and managers scored over eight (very good) with all others scoring over seven (good). The lowest-rated skills at present are managing workforce development, team leading and finance.

Respondents did not offer ratings for the first three skills with respect to future demand but all other skills are rated over 5 (increasing) with the exception of managing workforce development. In view of the very low number of responses to this part of the question we regard this result as being atypical and unreliable.

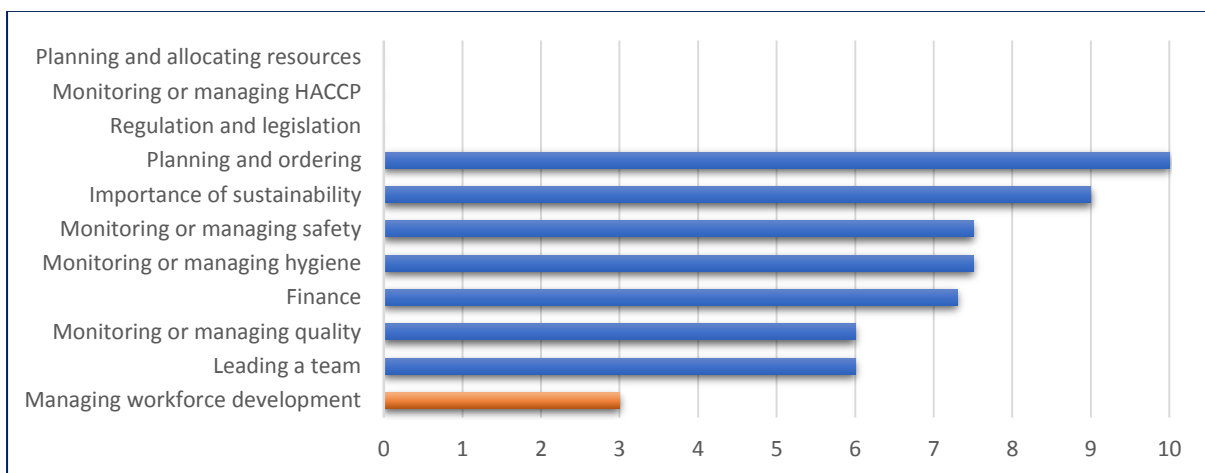
# Skills, Recruitment and Retention in England's Seafood Industry

Figure 60: Current skill level of supervisors and managers in England's frier sector



Source Pye Tait survey 2020 Not all respondents felt they could score every skill or provide specific responses. In some cases, therefore, there are no responses

Figure 61: Future skills demand for – supervisors and managers in England's fish frier sector



Source Pye Tait survey 2020 Not all respondents felt they could score every skill or provide specific responses. In some cases, therefore, there are no responses.



### 6.3.3 Training

Most of the training for the fish frier sector is managed by the National Federation of Fish Friers (NFFF) based in Leeds and KFE based in Market Deeping.

NFFF offers a one-day frying skills course which they deliver at their base in Leeds or on-site as well as a number of other relevant courses, including:

- Fish frying skills qualification – distance learning with on site assessment which covers frying skills, food hygiene, health and safety
- A three-day management skills course
- A distance learning customer service course

KFE supplies frying ranges in conjunction with an overseas manufacturer called QBTEC and also offers training through the KFE School of Frying Excellence. The school offers a two-day Fish and Chip training course, approved by Seafish, which includes frying, management and marketing.

Also offered are one-day courses in-house or on site; a course called Expand your Menu (preparation of different species); marketing – mainly around social media marketing; and future proofing – exploring setting up a 'click and collect' service.

There is a Level 2 apprenticeship production chef (fish frier) offered in England by Blackpool and Fylde College, and HIT Training.

The apprenticeship lasts for a minimum of 12 months and covers:

- Kitchen operations
- Nutrition
- Legal and governance
- People skills
- Business and commercial skills
- Personal development and performance

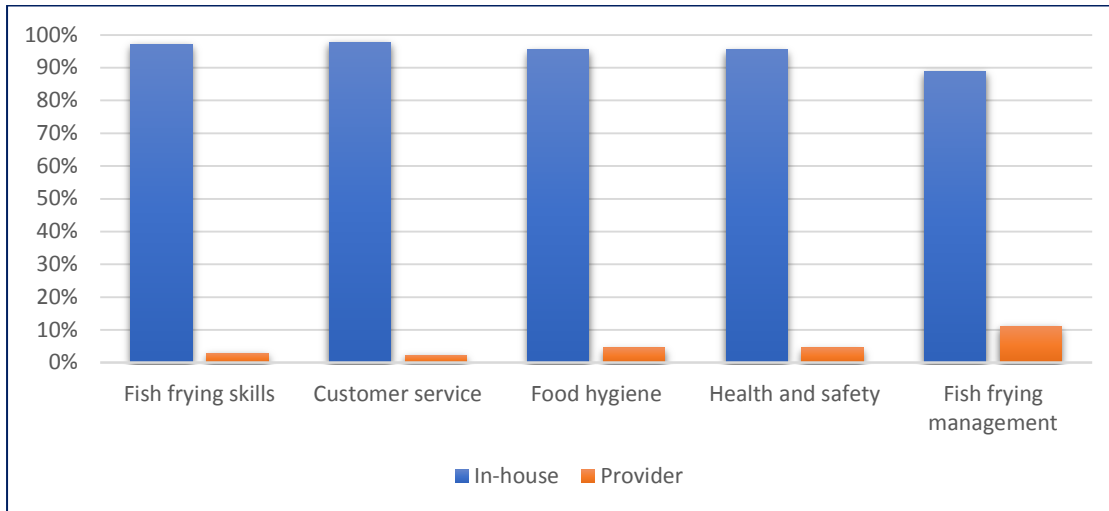
Nevertheless, our survey found that almost all training within the sector is in-house (Figure 62) with fish frying management being the only area of skill to warrant more than 10% of training being delivered externally.

*We don't send any staff on training courses. All training is carried out by myself. If I take on extra staff, I train all newcomers in fish frying, food hygiene and safety, serving the customer and handling cash transactions.*

**Fish Frier, East of England**

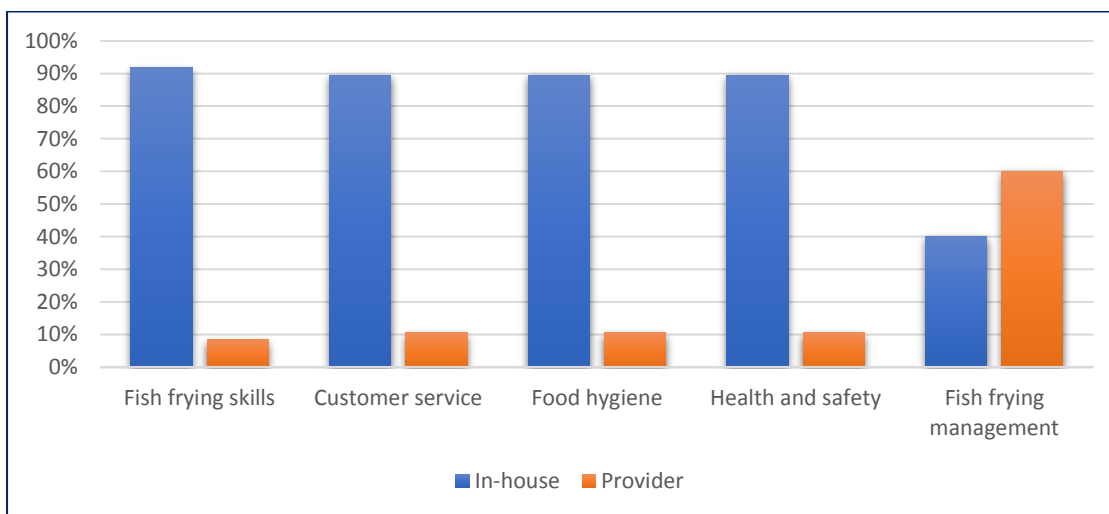
## Skills, Recruitment and Retention in England's Seafood Industry

Figure 62: Training for permanent fish frier staff in England



Source Pye Tait survey 2020

Figure 63: Training for seasonal fish frier staff in England

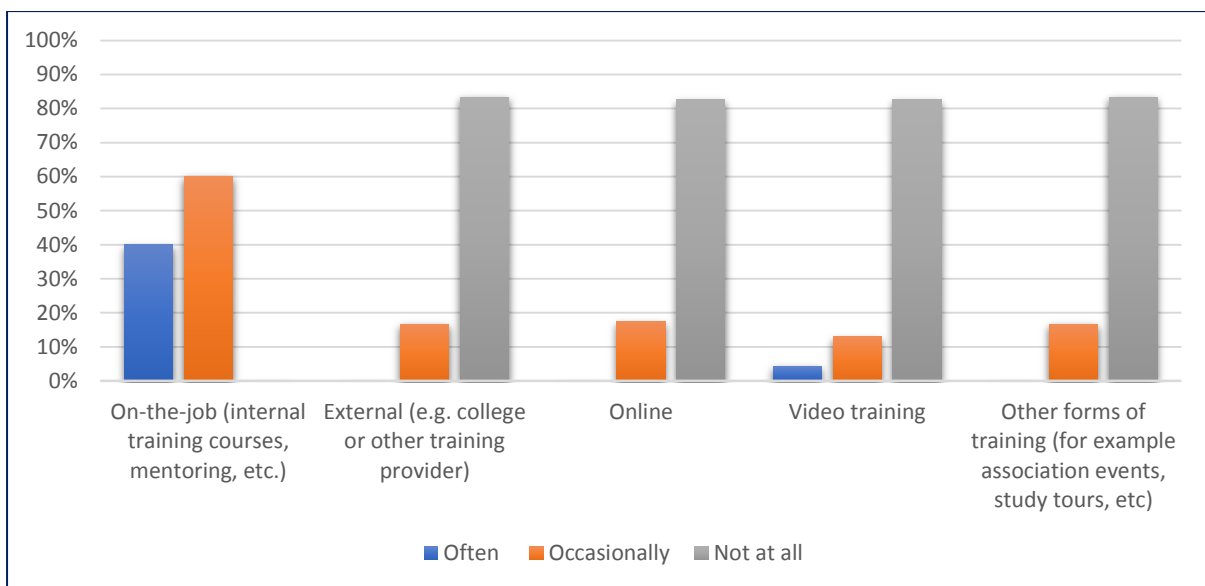


Source Pye Tait survey 202

## Skills, Recruitment and Retention in England's Seafood Industry

Figure 64 and 65 show the extent to which different types of training are used by employers. For both permanent and seasonal staff, the main approach is in-house, on-the-job

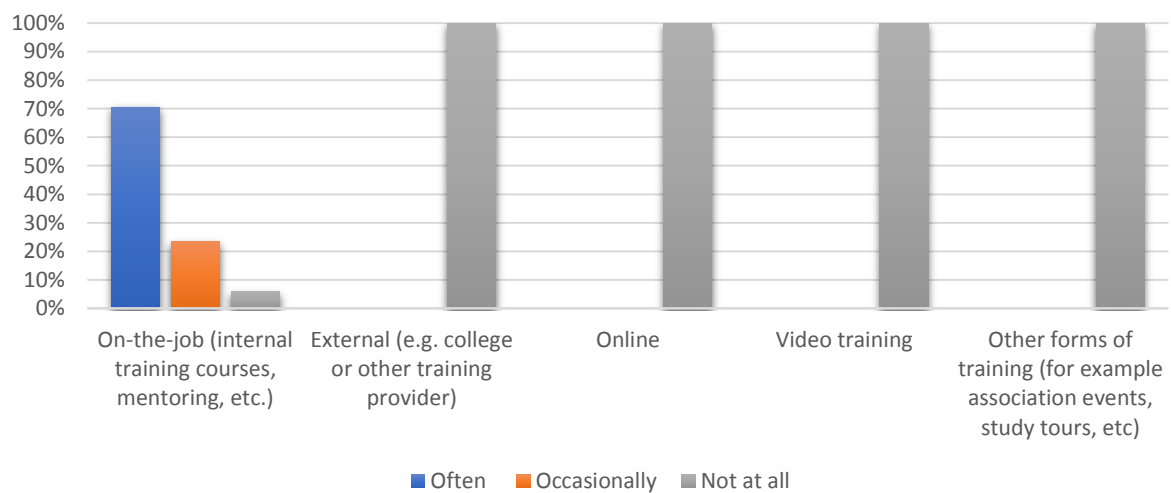
Figure 64: Use of different types of training for permanent staff in England's fish frier sector



Source Pye Tait survey 2020

Figure 65: Use of types of training for seasonal staff in England's fish frier sector

## Skills, Recruitment and Retention in England's Seafood Industry



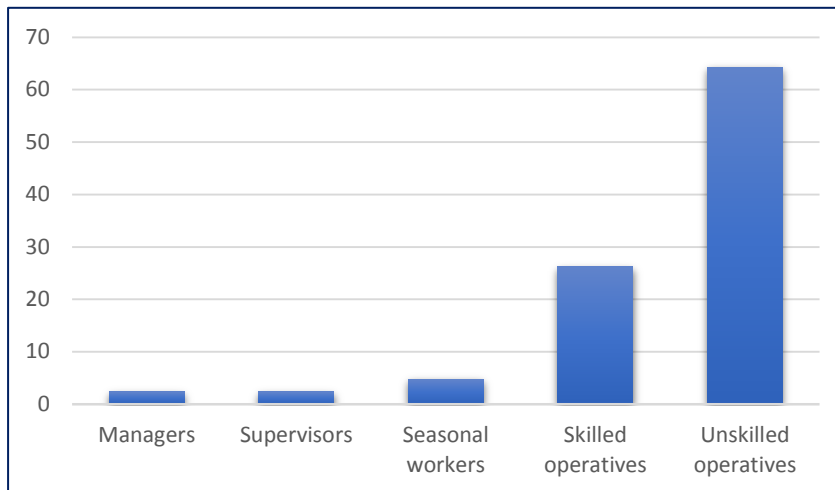
Source Pye Tait survey 2020

## Skills, Recruitment and Retention in England's Seafood Industry

### 6.3.4 Recruitment

The majority of vacancies over the past year have been for unskilled staff (over 64%) and skilled operatives account for a further quarter.

Figure 66: Percentage of vacancies in 2018-2019 in England's fish frier sector



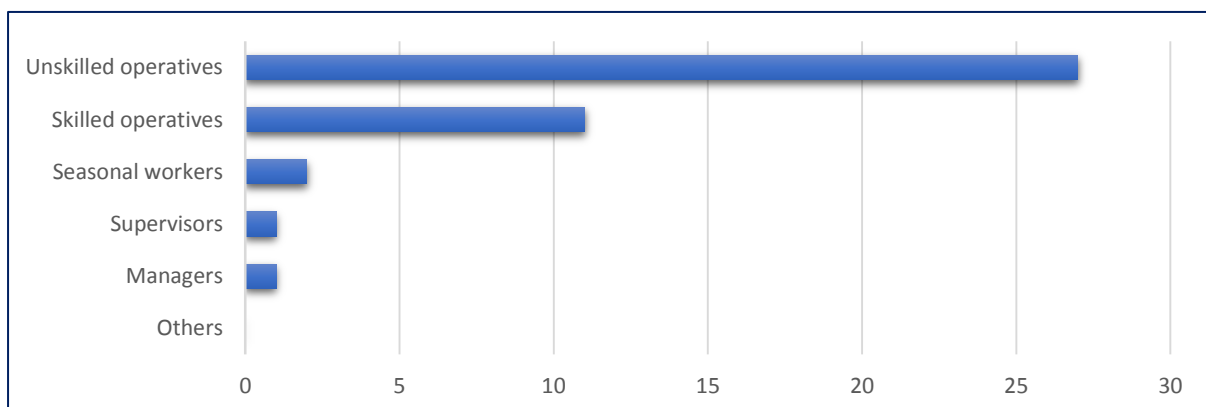
Source Pye Tait survey 2020

The recruitment picture for the fish frier sector is supported by responses to a number of questions. Numbers of vacancies over the past year and the past three years show that unskilled staff and skilled staff are the most common.

These two grades account for 94% of all hard-to-fill vacancies.

Employers spoke of difficulties finding people with a desire to stay in the sector and to train as fish friers. Stakeholders highlighted regional difficulties particularly in tourist areas with a high cost of living, giving the South Coast and Lake District as examples.

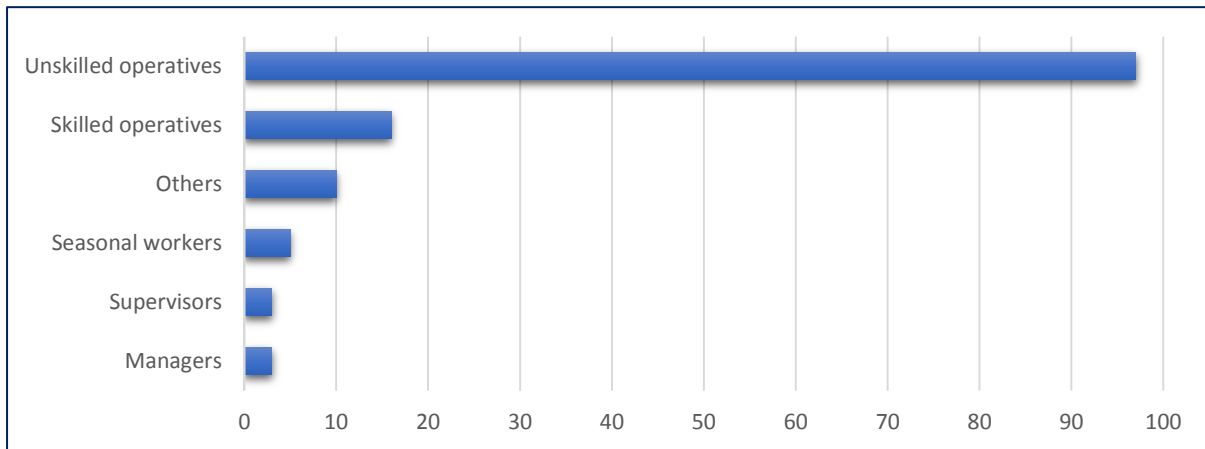
Figure 67: Number of vacancies in 2018-2019 in England's fish frier sector



Source Pye Tait survey 2020

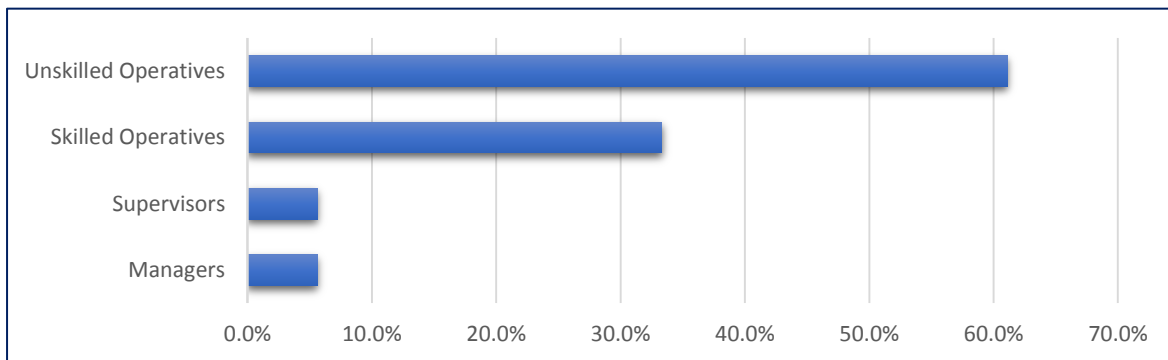
## Skills, Recruitment and Retention in England's Seafood Industry

Figure 68: Number of vacancies over past three years in England's fish frier sector



Source Pye Tait survey 2020

Figure 69: Difficult to fill job roles in England's fish frier sector



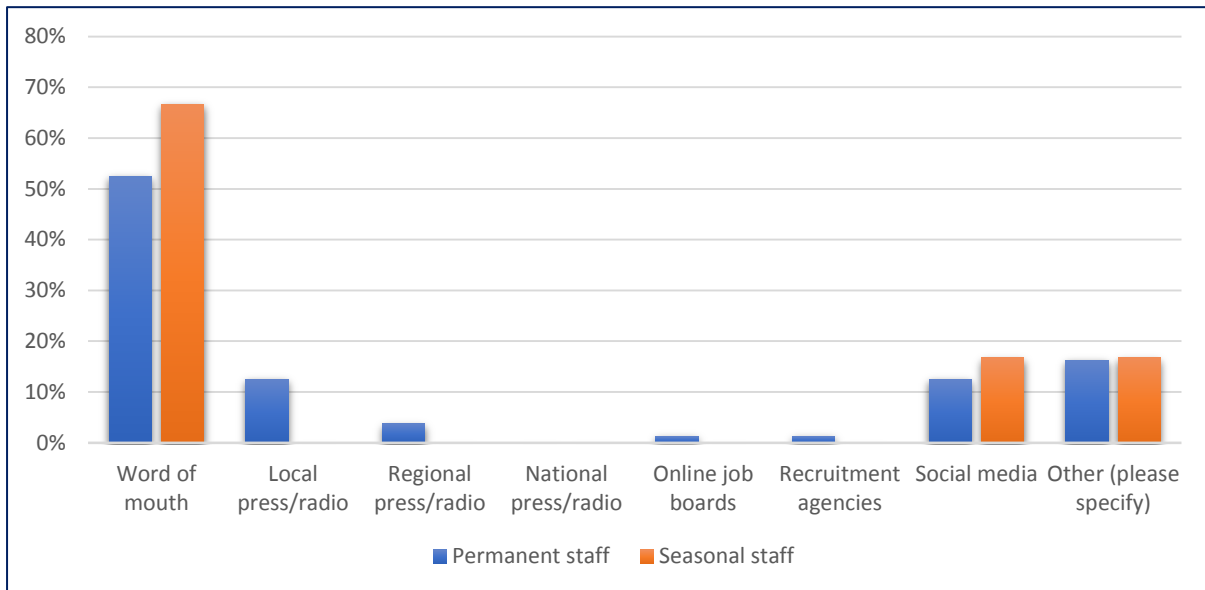
Source Pye Tait survey 2020

Fish friers tend to use word-of-mouth to recruit staff but social media has become more important and is now used more frequently than local press or radio.

Employers use most media for managerial recruitment but tend to use word-of-mouth more for skilled, unskilled and seasonal workers.

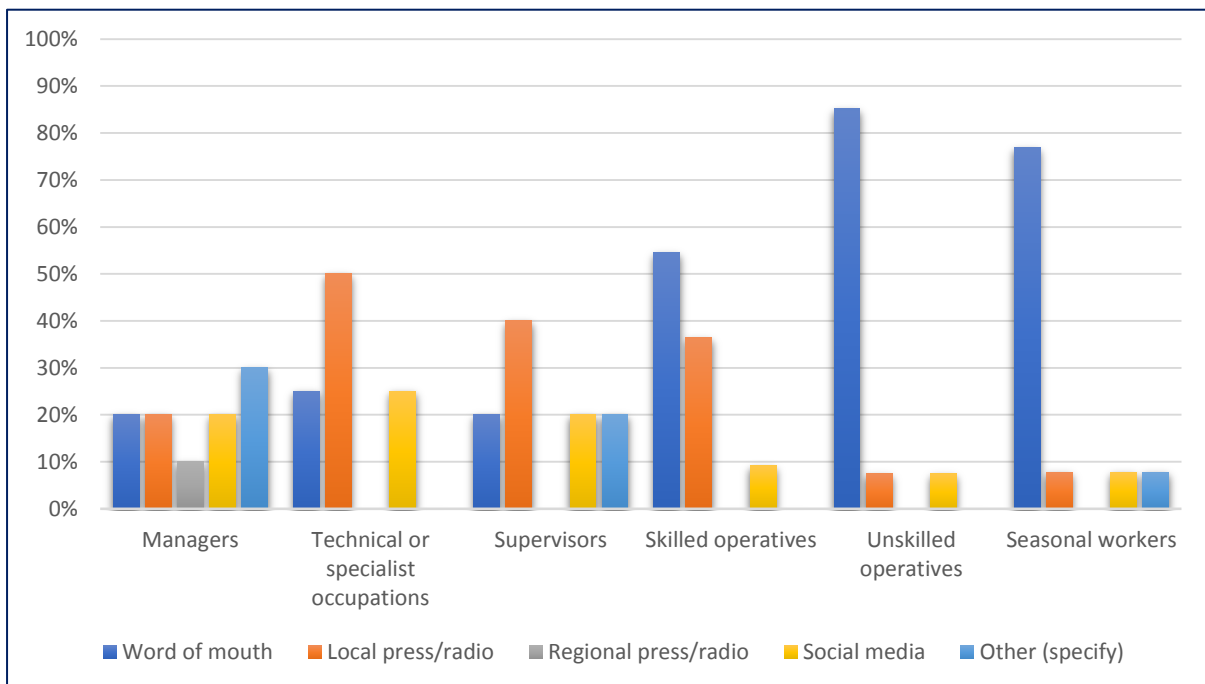
# Skills, Recruitment and Retention in England's Seafood Industry

Figure 70: Recruitment methods used in England's fish frier sector



Source Pye Tait survey 2020

Figure 71: Preferred recruitment methods by grade of staff in England's fish frier sector



Source Pye Tait survey 2020

## 6.4 Processing

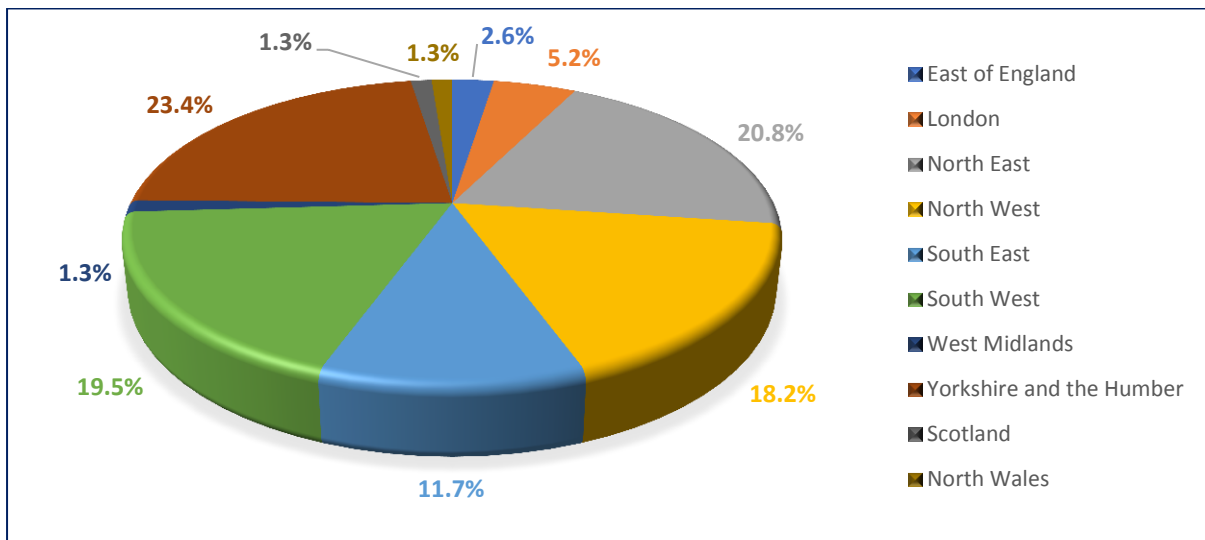
### 6.4.1 Introduction

The survey covered a high proportion of processing businesses headquartered in England, which operate across most regions of England, Scotland and Wales (

Figure 7272).

More than eight out of ten of the businesses are primary processors.

Figure 72: Regions in which processing businesses operate in England

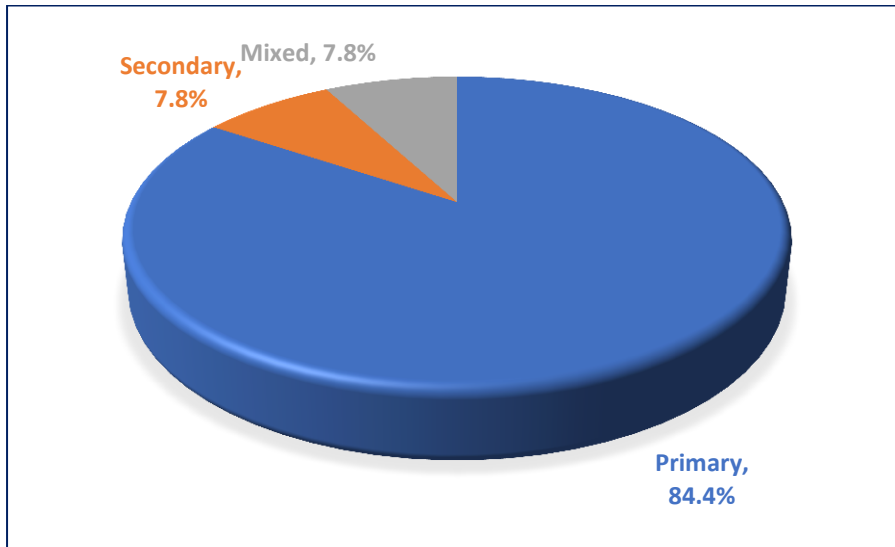


Source Pye Tait survey 2020



## Skills, Recruitment and Retention in England's Seafood Industry

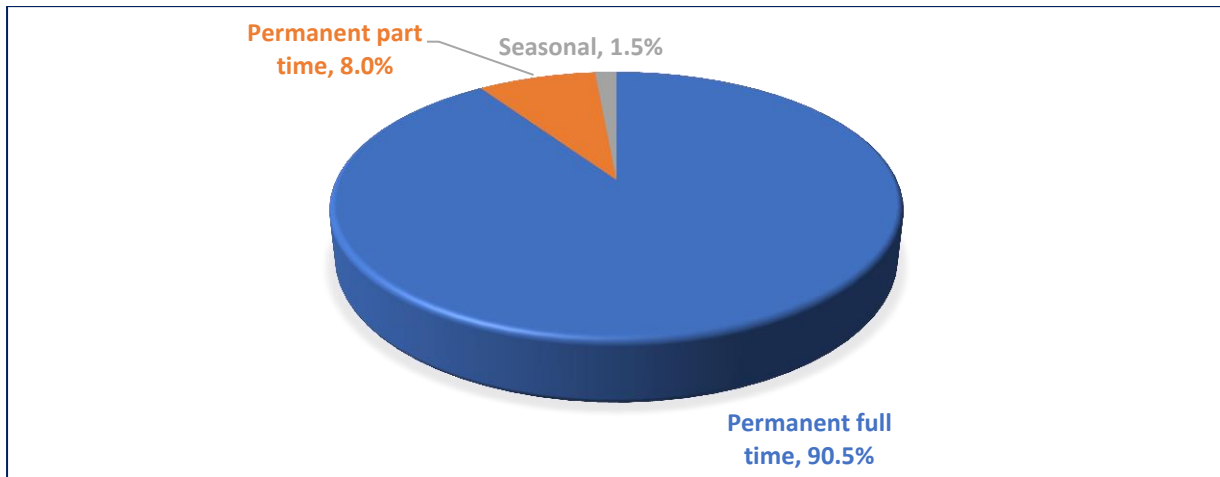
Figure 73: Type of processor in England



Source Pye Tait survey 2020

More than 98% of staff are employed on a permanent basis and over 90% are permanent full-time employees.

Figure 74: Employment by contract type in England's processing sector

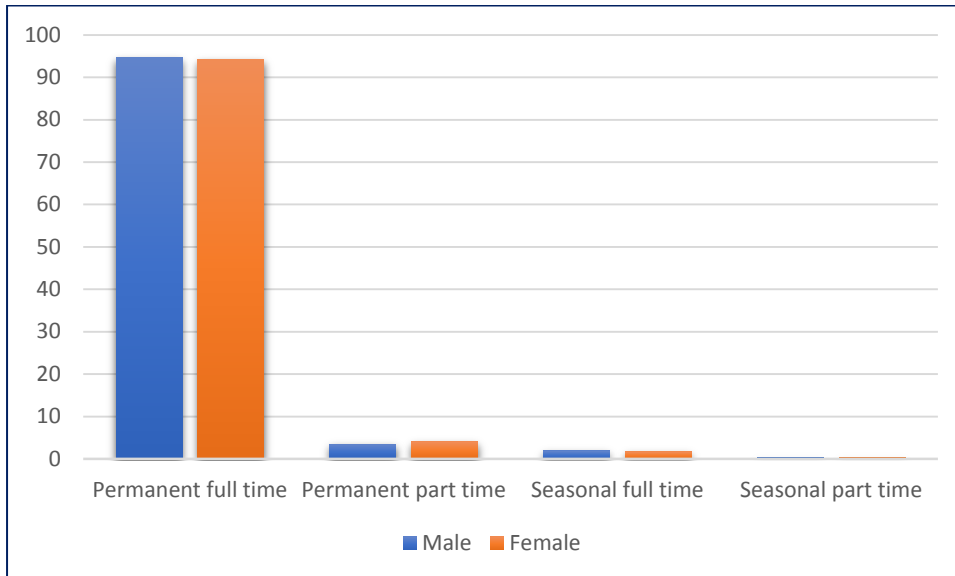


Source Pye Tait survey 2020

Almost all men and women are employed on permanent contracts and the vast majority of both permanent and seasonal staff are UK residents.

## Skills, Recruitment and Retention in England's Seafood Industry

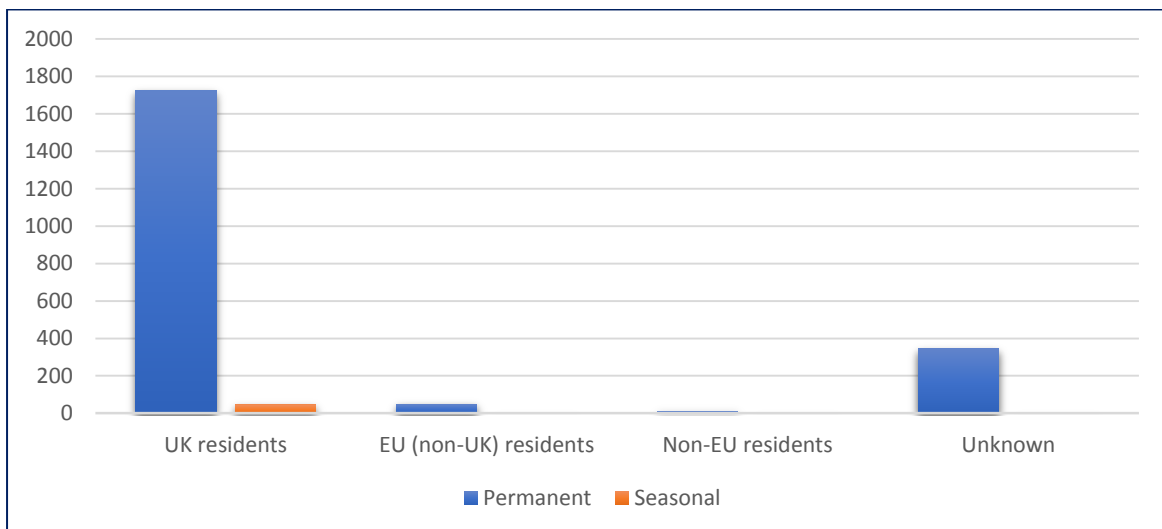
Figure 75: Gender by mode of employment in England's processing sector



Source Pye Tait survey 2020

Results for 1,236 males and 602 females.

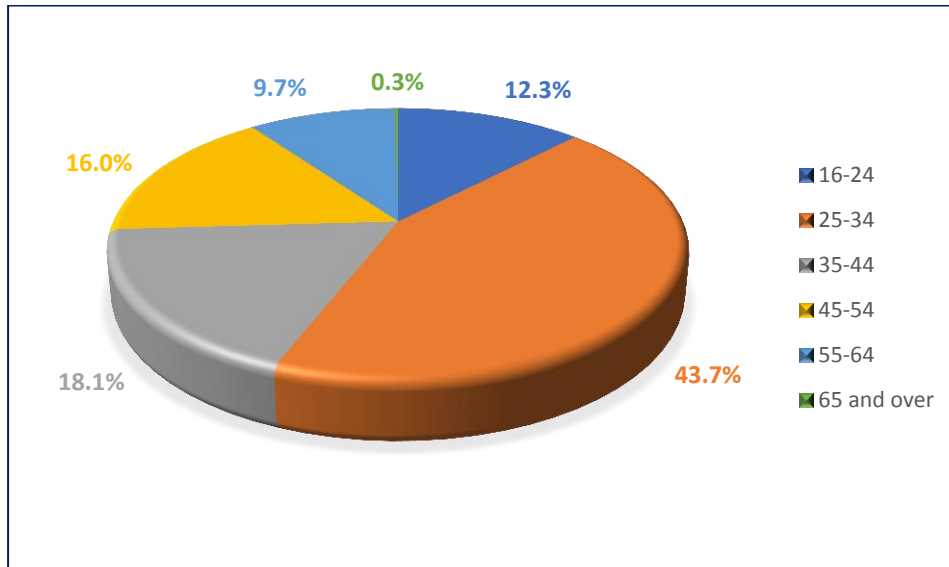
Figure 76: Residency of processing staff in England



Source Pye Tait survey 2020

The age profile for the industry appears to be very youthful – only 26% of employees are aged over 45 years and some 56% are aged under 35. These results were however obtained from 18 companies that could provide age-related information out of the total sample of 77.

Figure 77: Processing Age Profile in England



Source Pye Tait survey 2020

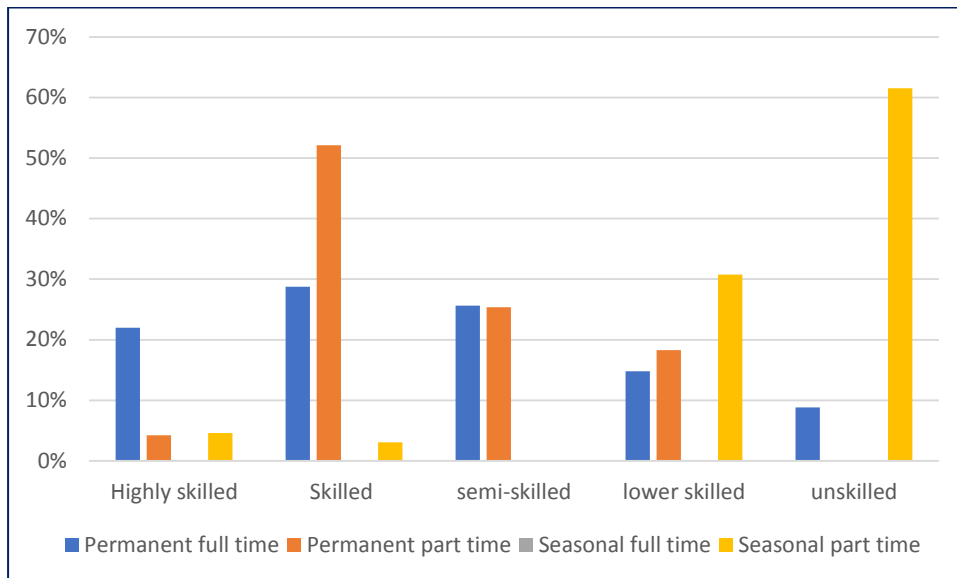
## 6.4.2 Skills

Employers in the processing sector see their permanent full-time workforces as being ranged fairly evenly across the skills dimension but their part-time permanent staff being mostly skilled workers. Seasonal staff are generally lower skilled or unskilled.

Skills gaps are seen as being caused by insufficient amounts or relevance of external training but there were low numbers of responses to this question (22).

# Skills, Recruitment and Retention in England's Seafood Industry

Figure 78: Skill level by mode of employment in England's processing sector



Source Pye Tait survey 2020

Figure 79: Reasons for skills gaps in England's processing sector

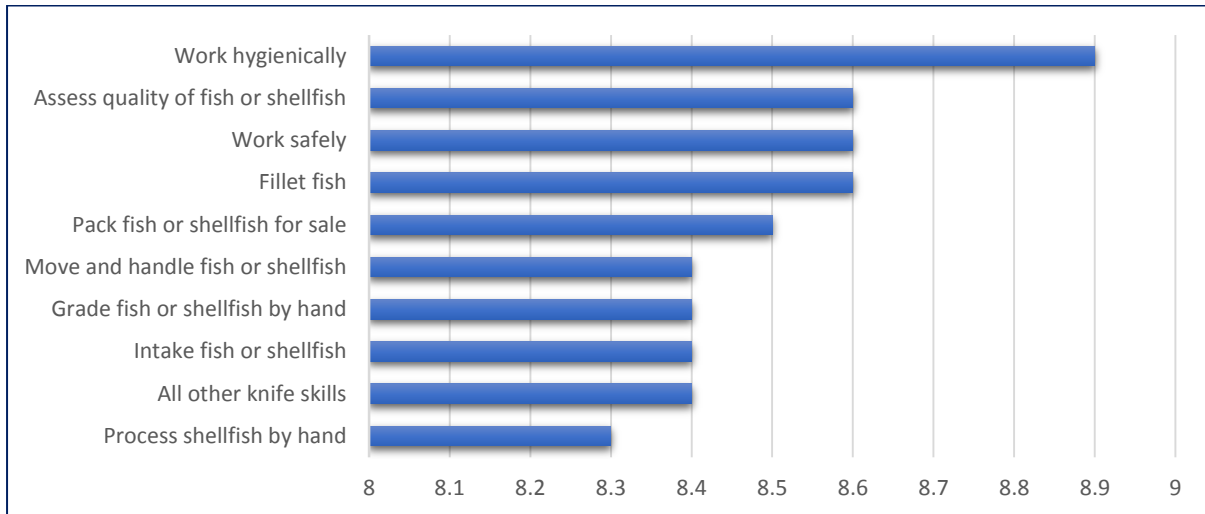


Source Pye Tait survey 2020

Current skill levels of primary operatives are regarded as very good (above eight out of ten). Future demand for these skills is seen as generally increasing.

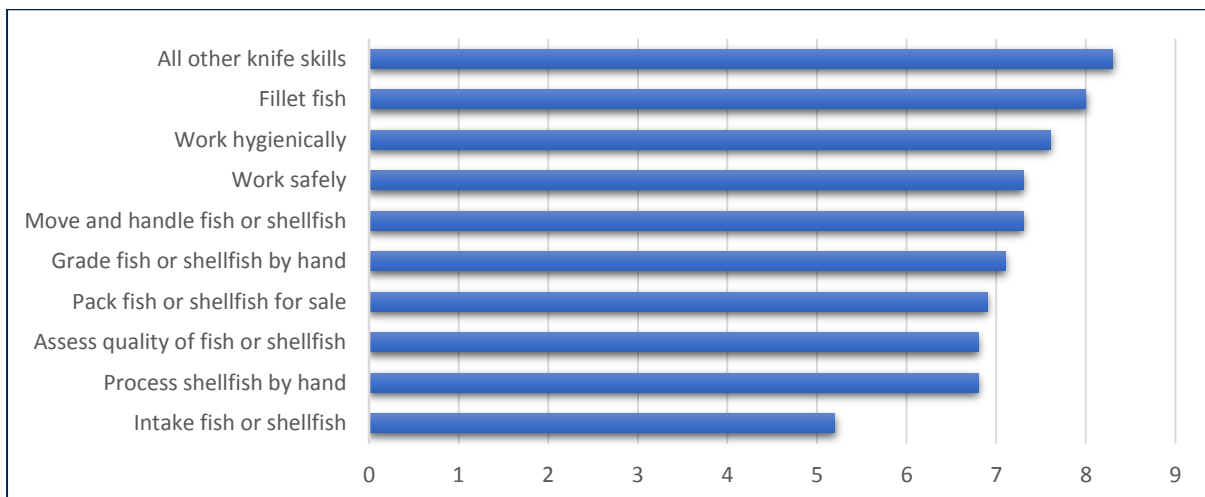
## Skills, Recruitment and Retention in England's Seafood Industry

Figure 80: Current skills of primary operatives in England's processing sector



Source Pye Tait survey 2020

Figure 81: Future Demand for English processing skills of primary operatives

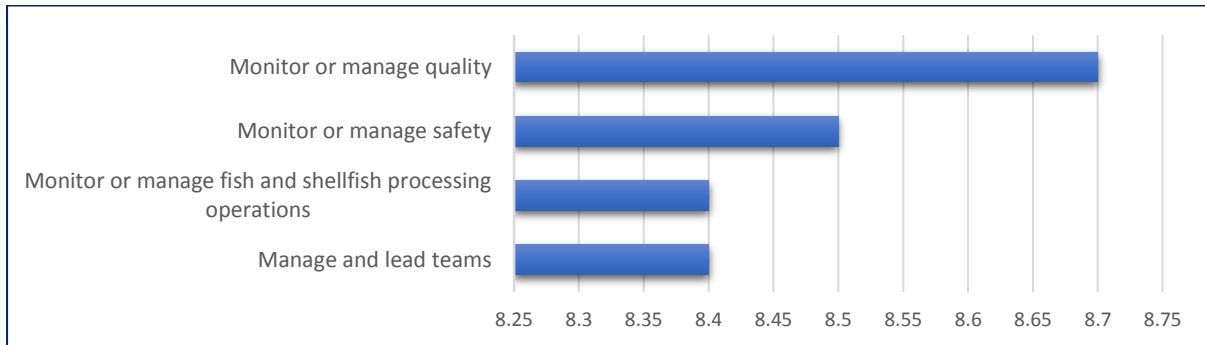


Source Pye Tait survey 2020

The current skills of primary supervisors and managers are felt to be very good and the future demand for them seems to be thought to be increasing.

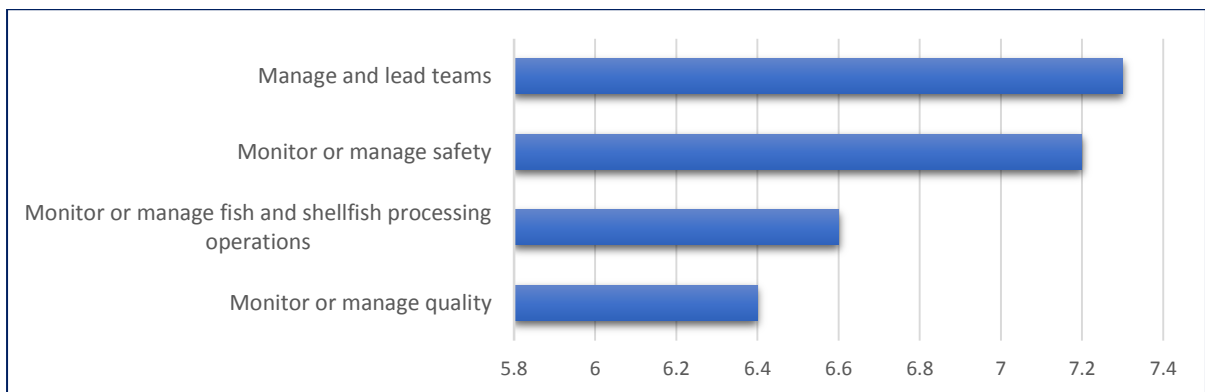
## Skills, Recruitment and Retention in England's Seafood Industry

Figure 82: Current Skills of Primary Supervisors and Managers in England's processing sector



Source Pye Tait survey 2020

Figure 83: Future demand for primary supervisor and manager processing skills in England



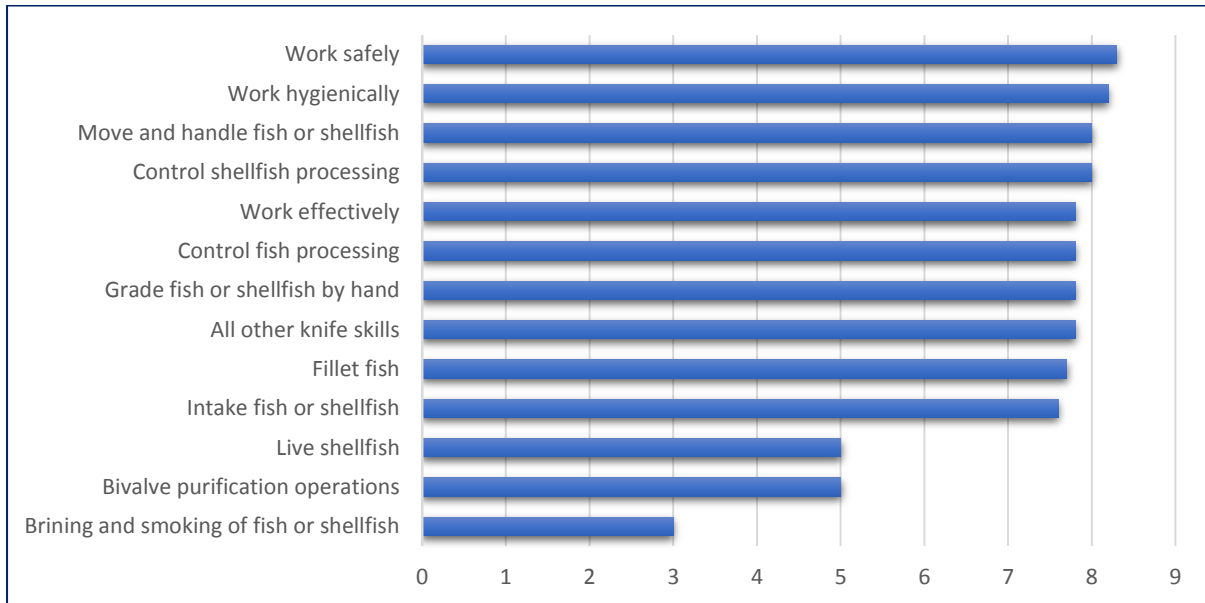
Source Pye Tait survey 2020

Most of the current skills of secondary operatives are felt to be good (over seven) but skills with live shellfish, bivalve purification and brining and smoking score poorly – below five.

The future demand for such skills is largely increasing but there may be a need for developments with respect to the lower scoring skillsets.

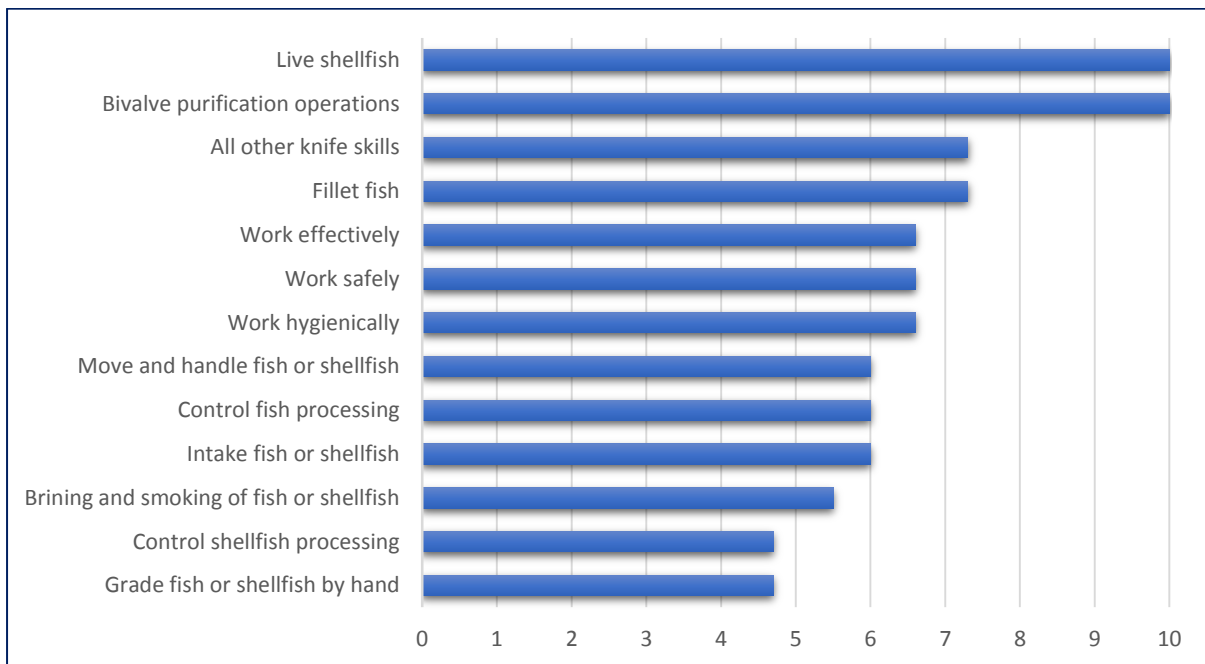
## Skills, Recruitment and Retention in England's Seafood Industry

Figure 84: Current secondary operative skills in England's processing sector



Source Pye Tait survey 2020

Figure 85: Future demand for secondary operative processing skills in England



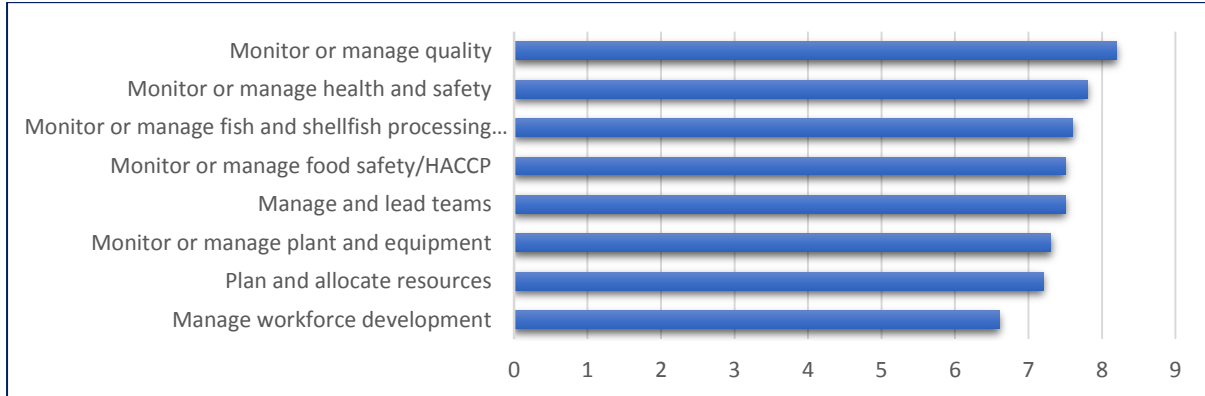
Source Pye Tait survey 2020

Most of the current skills of secondary supervisors and managers are felt to be fair to good (over six).

## Skills, Recruitment and Retention in England's Seafood Industry

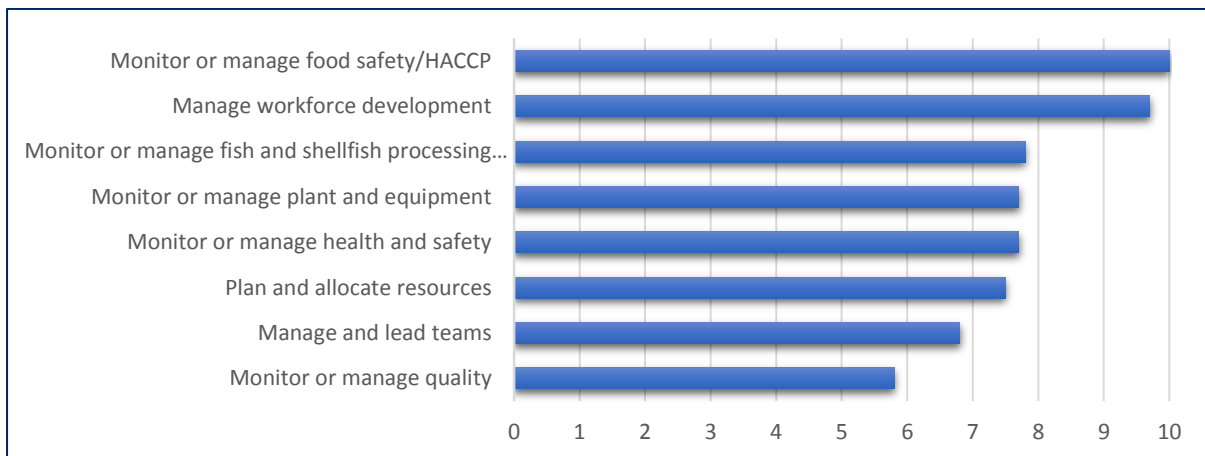
The future demand for these skills is largely increasing but there may be a need for developments with respect to the lower scoring skillsets.

Figure 86: Current secondary supervisor and manager processing skills in England



Source Pye Tait survey 2020

Figure 87: Future demand for secondary supervisor and Manager processing skills in England



Source Pye Tait survey 2020

### 6.4.3 Training

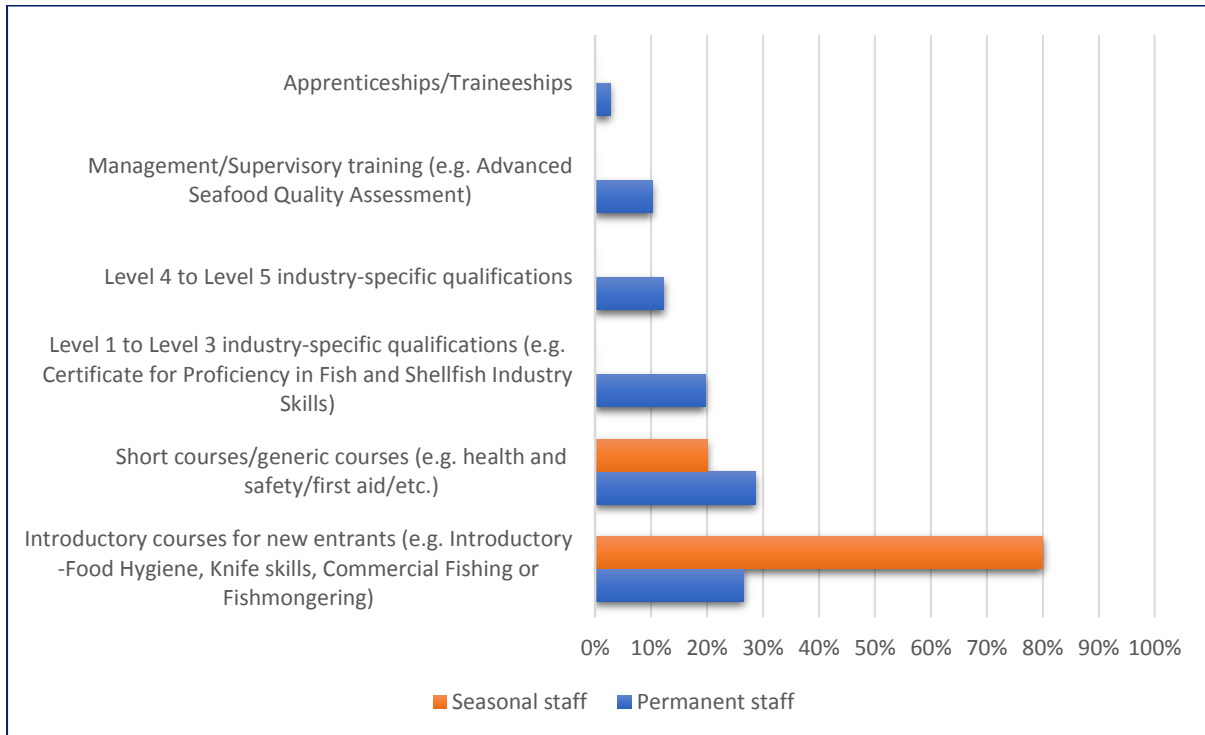
In specialist terms, processor training is mainly concerned with fish filleting and shellfish care and preparation. The expense involved in providing fish for training, (which unless the provision is offered at a registered food business has to be consigned to waste) is a barrier to provision of training. Much of the specialist training is conducted in-house.

Figure 8888 illustrates the sorts of training undertaken by processors over the past year by type. Note that only five employers reported training seasonal staff.



# Skills, Recruitment and Retention in England's Seafood Industry

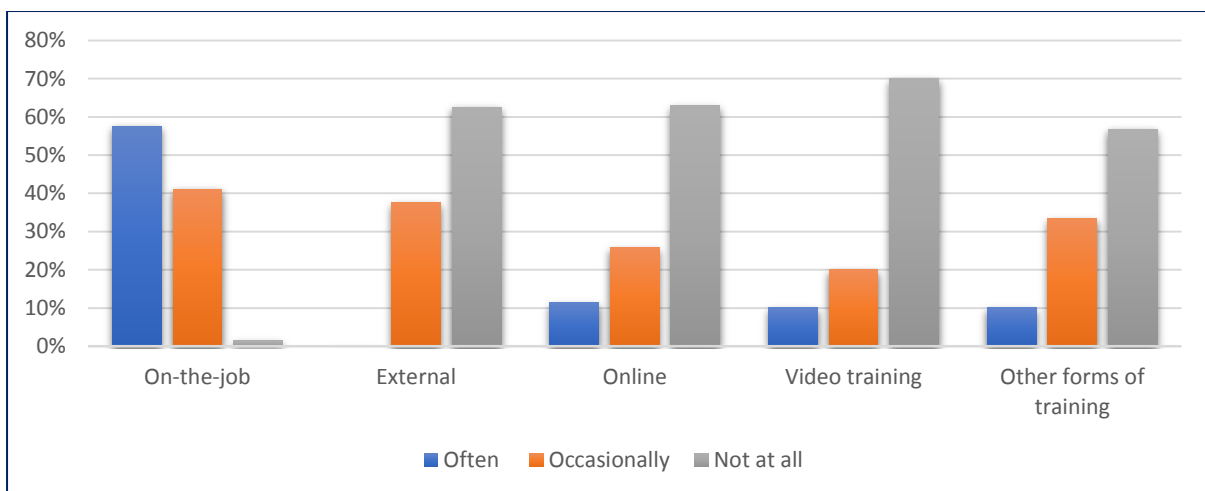
Figure 88: Courses undertaken in past year in England's processing sector



Source Pye Tait survey 2020

A high proportion of training in the sector is conducted in-house but both online and video training are often used around 10% of the time and occasionally used around a quarter of the time. Seasonal staff tend to receive on-the-job, online and video training.

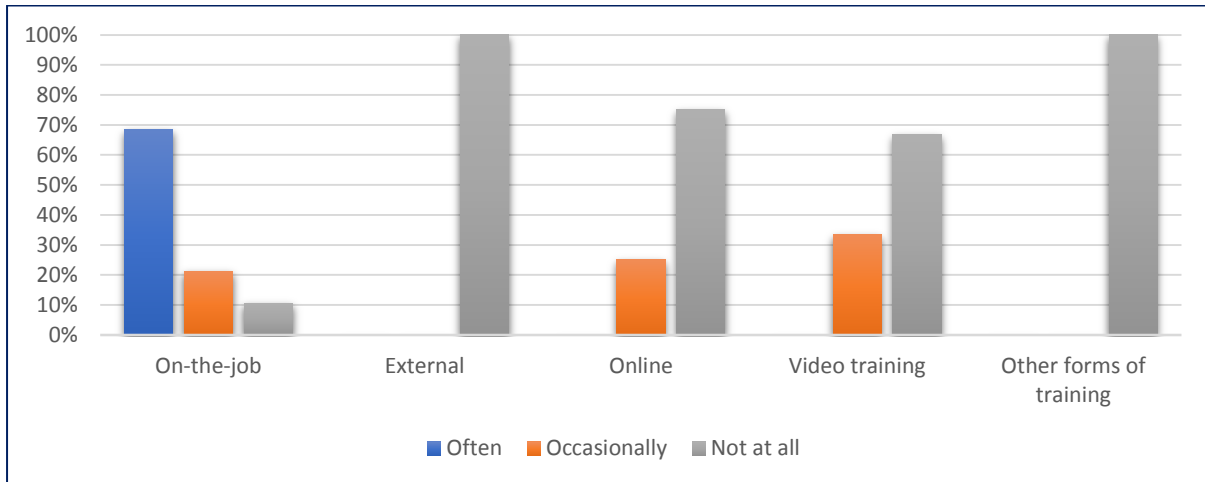
Figure 89: Use of different types of training for permanent staff in England's processing sector



Source Pye Tait survey 2020

## Skills, Recruitment and Retention in England's Seafood Industry

Figure 90: Use of different types of training for seasonal staff in England's processing sector

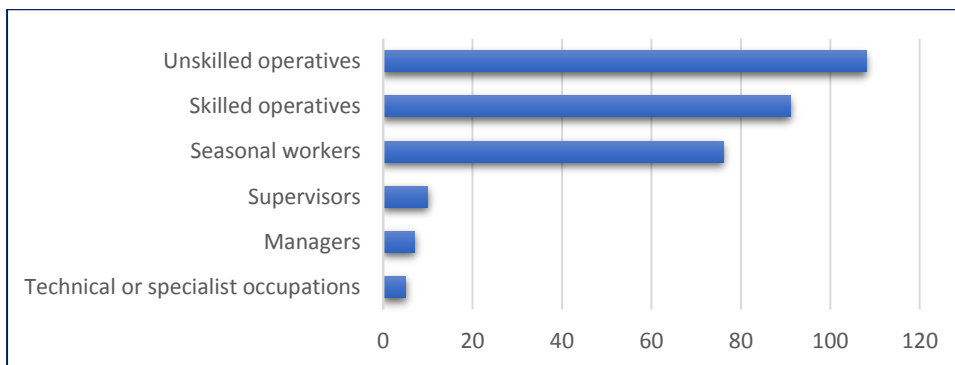


Source Pye Tait survey 2020

### 6.4.4 Recruitment

Employers responding to the survey reported a total of 297 vacancies over the past year. With respect to the 2,204 staff employed by these companies this represents an average of 13.5% vacancies over the year – a little below the national turnover average of around 15%.

Figure 91: Number of vacancies in 2018-2019 in England's processing sector



Source Pye Tait survey 2020

Unskilled operatives and skilled operatives are the most difficult to fill.

*Finding people with fish filleting experience is difficult. On average one out of every hundred applications is suitable, with the right skills and experience for the job'*

**Processor, North East**

However, the most difficult to fill were said by employers to be managers, technical occupations and supervisors.

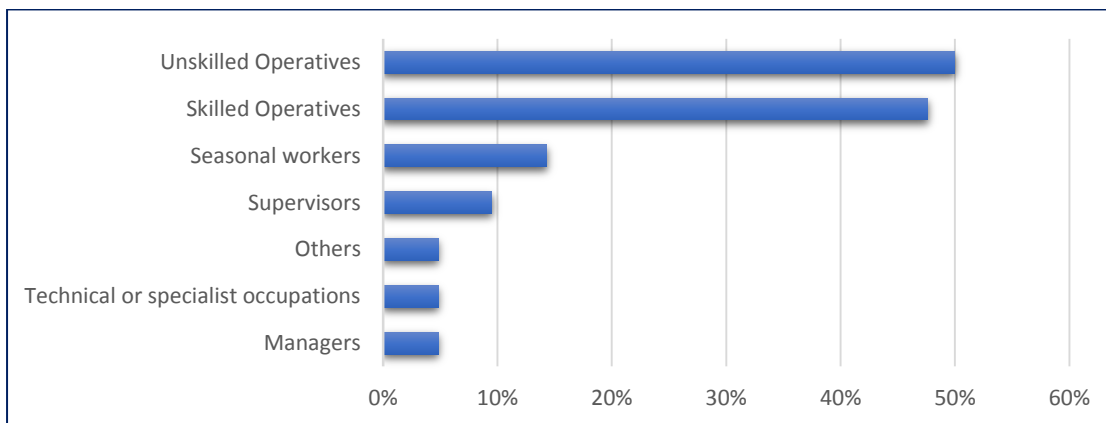
## Skills, Recruitment and Retention in England's Seafood Industry

In common with other sectors there is a general feeling among employers that careers in processing do not appeal to young people.

*The industry needs a face-lift. It needs to be introduced to young people. Generally, young people do not even look at this job, the hours are long, and the job is hard. We need more marketing and advertising to help push the opportunities available.*

### Processor, North West

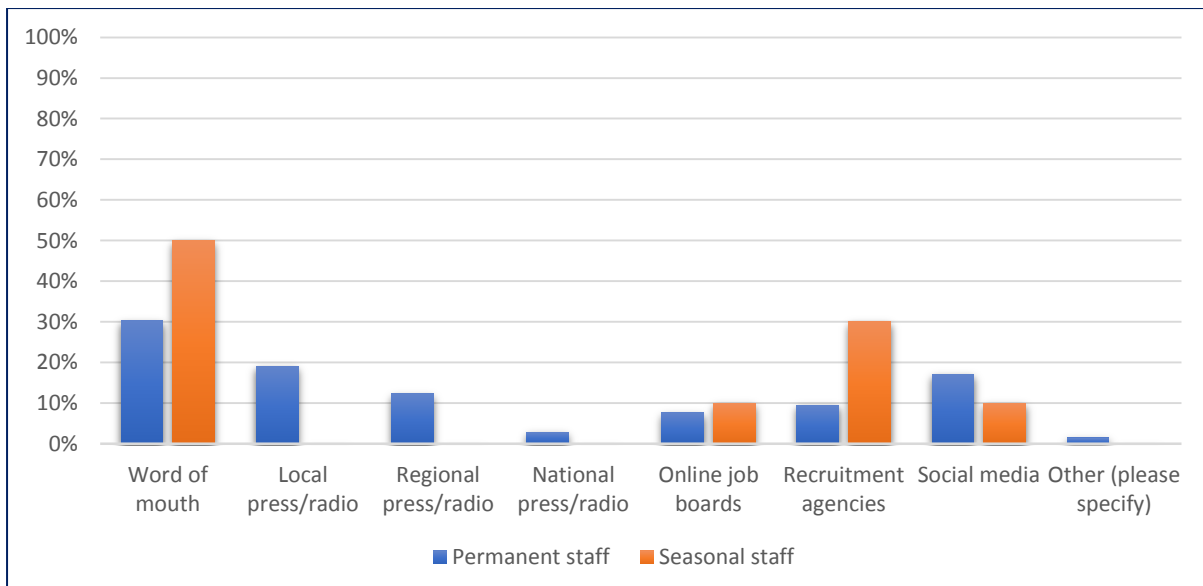
Figure 92: Vacant roles difficult to fill in England's processing sector



Source Pye Tait survey 2020

While word of mouth is used relatively often, employers use a wide variety of recruitment methods and have specific methods for different types of staff.

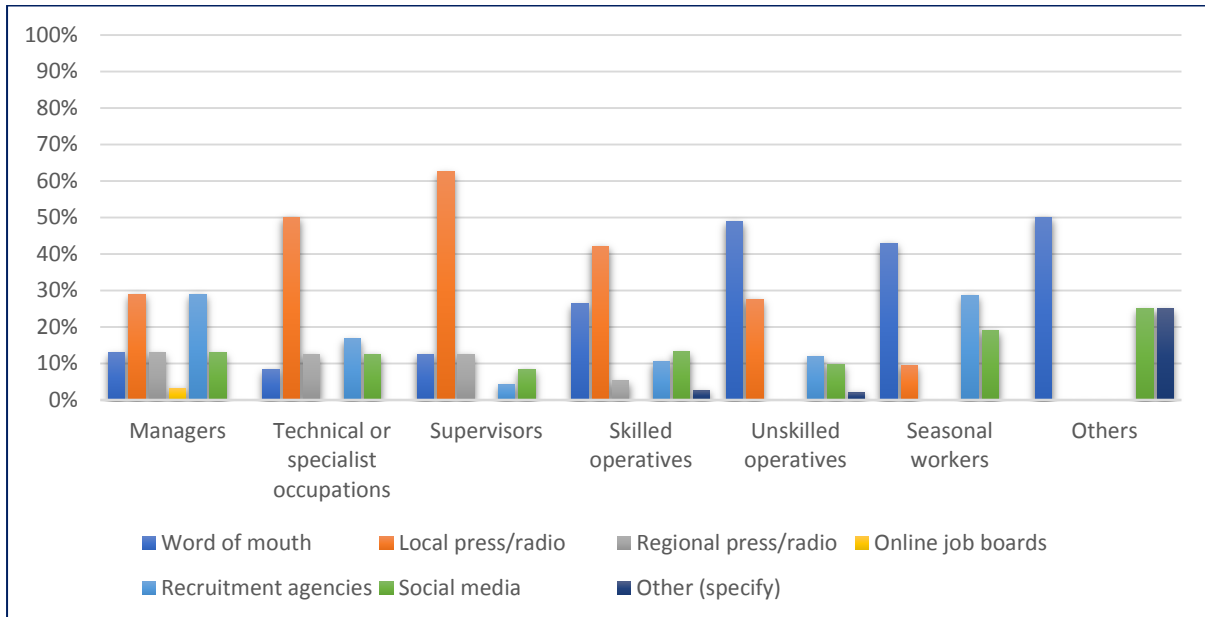
Figure 93: Recruitment methods in England's processing sector



Source Pye Tait survey 2020

# Skills, Recruitment and Retention in England's Seafood Industry

Figure 94: Preferred method of recruitment by job role in England's processing sector



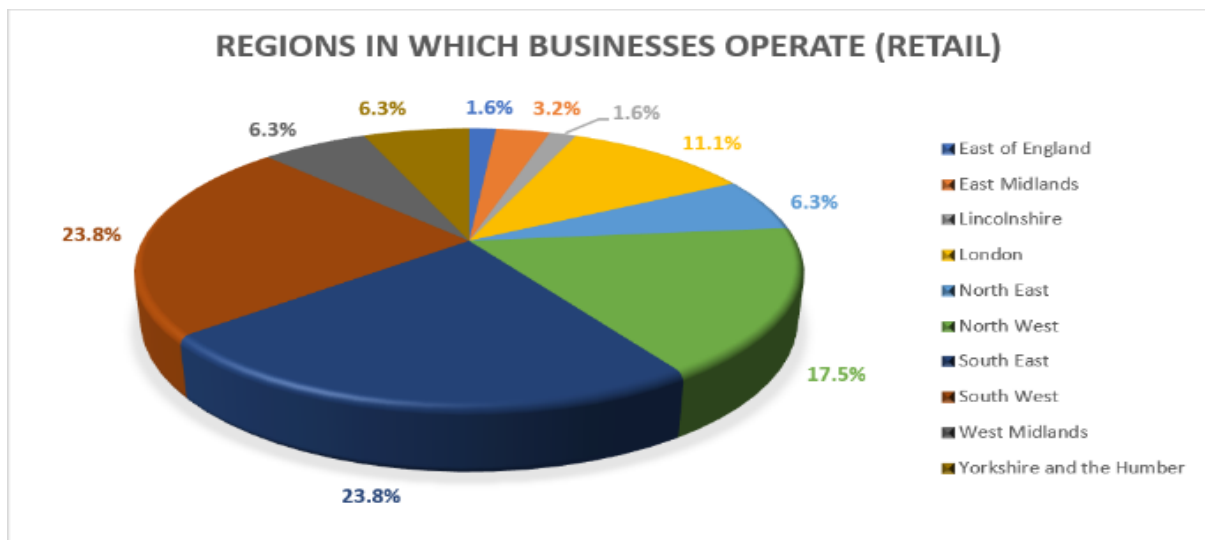
Source Pye Tait survey 2020

## 6.5 Retail

### 6.5.1 Introduction

Over 97% of retail staff in fishmongers across England are employed on a permanent basis with nine out of ten employed full time.

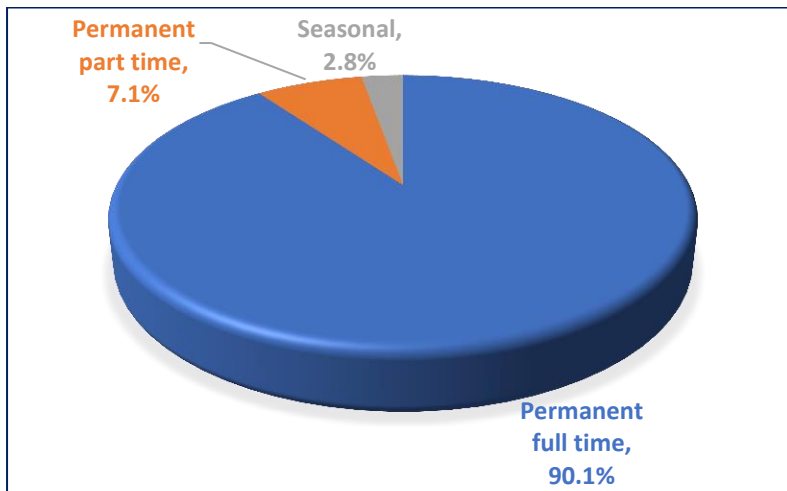
Figure 95: Regions of operation for retail businesses in England



Source Pye Tait survey 2020

## Skills, Recruitment and Retention in England's Seafood Industry

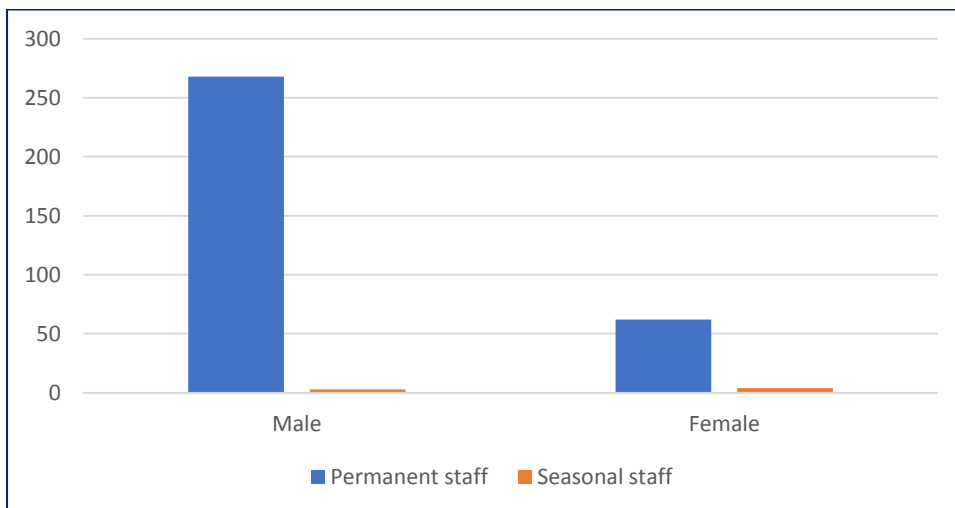
Figure 96: Retail staff by contract type in England



Source Pye Tait survey 2020

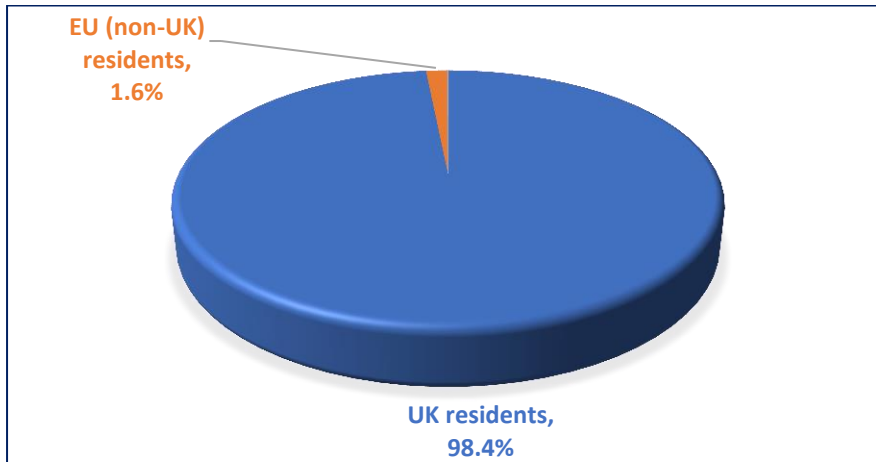
Some 80% of the permanent staff are male (sixty companies responded) and 98% are UK residents.

Figure 97: Staff by gender in England's retail sector



Source Pye Tait survey 2020

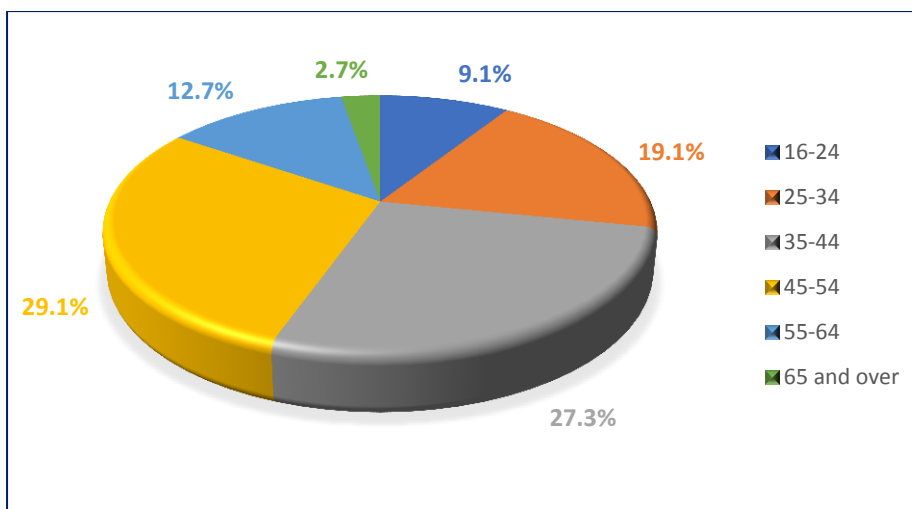
Figure 98: Residency of retail staff in England



Source Pye Tait survey 2020

The age profile of the surveyed respondents is 44.5% over 45 years (a little above the UK average) and 28.2% under 35.

Figure 99: Retail age profile in England



Source Pye Tait survey 2020

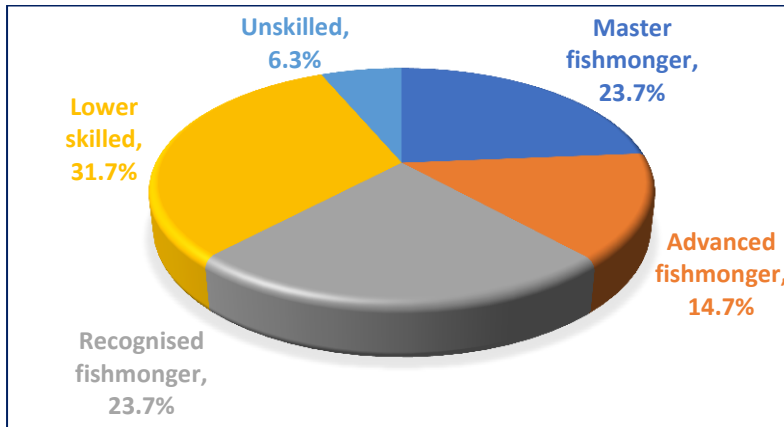
## 6.5.2 Skills

The retail sector requires a specialised mix of high food skills and management and retail skills.

Three levels of top skill are used in the sector: recognised fishmonger, advanced fishmonger and master fishmonger. These three skilled categories account for over 60% of the employees.

## Skills, Recruitment and Retention in England's Seafood Industry

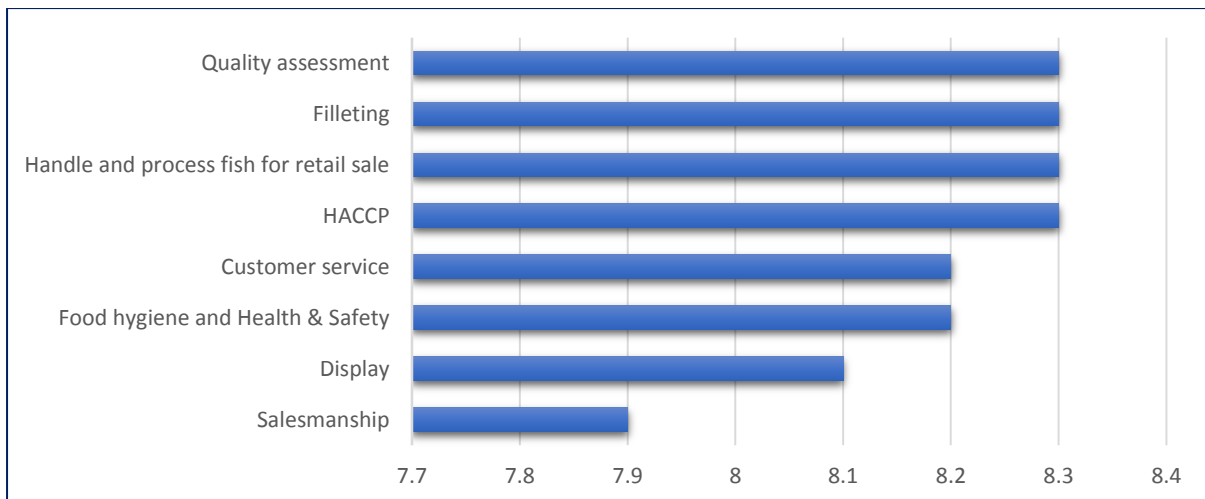
Figure 100: Permanent retail staff by skill level in England



Source Pye Tait survey 2020

Employers rate the current skills of their operative workforce as good to very good. All skills except salesmanship are rated above eight out of ten.

Figure 101: Current skills of the retail operative workforce in England

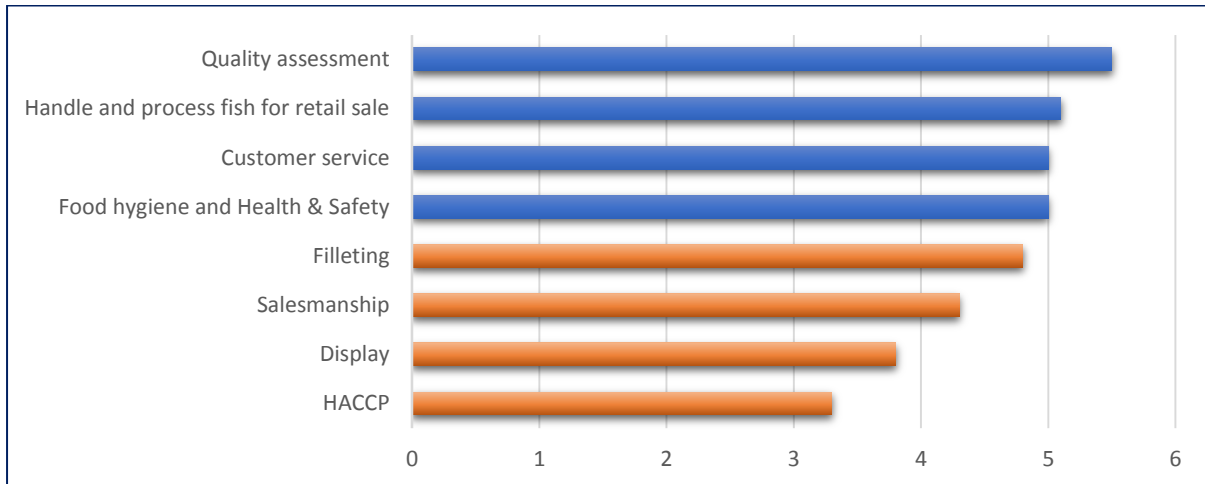


Source Pye Tait survey 2020

The future demand for skills is mostly seen, however, as diminishing. Skills scored above five are perceived as increasing in importance; those scored below five as decreasing in importance, coloured blue and orange respectively on figure 102

## Skills, Recruitment and Retention in England's Seafood Industry

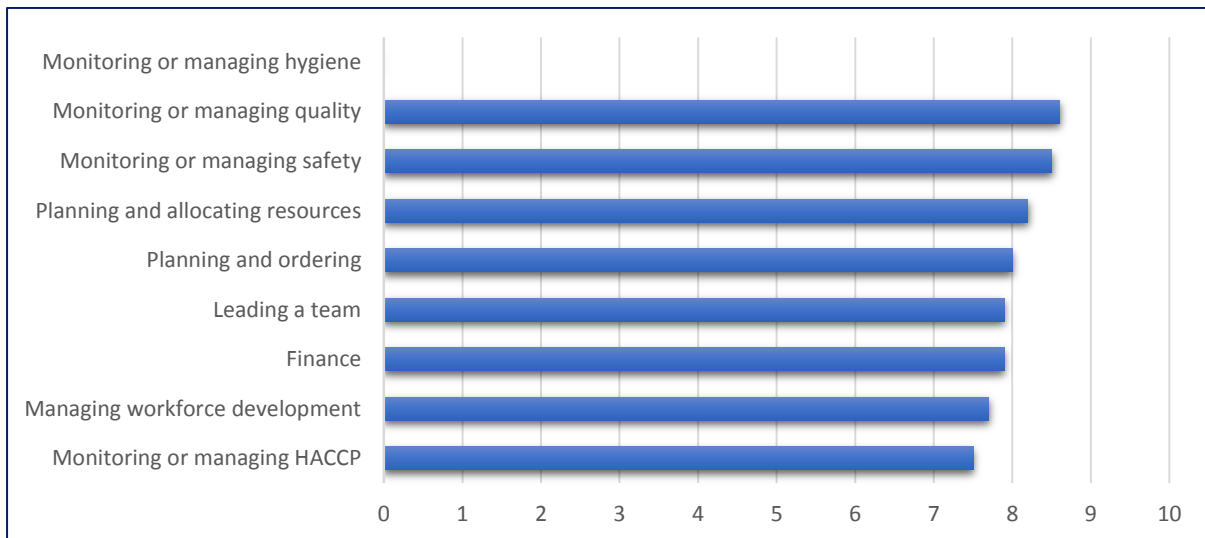
Figure 102: Future demand for operative retail skills in England



Source Pye Tait survey 2020

Current management and supervisor skills are regarded as good to very good but the perception of future demand is that it will decline in most skill areas.

Figure 103: Current supervisor and manager retail skills in England

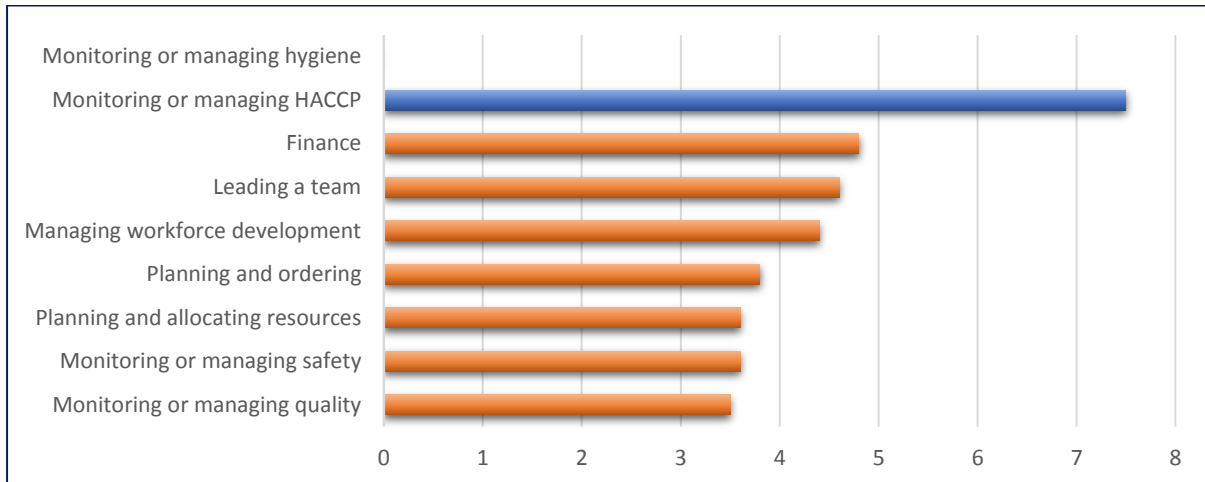


Source Pye Tait survey 2020



## Skills, Recruitment and Retention in England's Seafood Industry

Figure 104: Future demand for supervisory and managerial retail skills in England



Source Pye Tait survey 2020

### 6.5.3 Training

There is a good deal of training available for the retail sector. The principle training organisations are The Seafood School at Billingsgate and Grimsby Seafood Village.

The Seafood School at Billingsgate offers retail training alongside training aimed at schools, catering colleges, hotels, restaurants and processors. It delivers a wide variety of courses including trade buying experience, the fish trade knife skills, 'Get into Fishmongering Shellfish', trade preparation skills, Fish & Shellfish Quality Assessment, the City & Guilds Seafood Retail Certificate (two day), Fish cookery and nutrition for fish trade, the business of fishing and fish processing, farmed fish & shellfish - challenges and opportunities, and Understanding Seafood Sustainability.

Grimsby Seafood Village Training School offers training programmes including: Fish smoking - Introductory and Basic fish smoking courses approved by Seafish, fish filleting and fishmongering courses - bespoke from one day to three-days, Master Fishmonger Scheme, MFS Recognised Fishmonger, MFS Advanced Fishmonger, MFS Companion Fishmonger, MFS Craft Fishmonger, Retail Apprentice Programme, Intermediate Apprenticeship units, Advanced Apprenticeship units – for supervisors and managers.

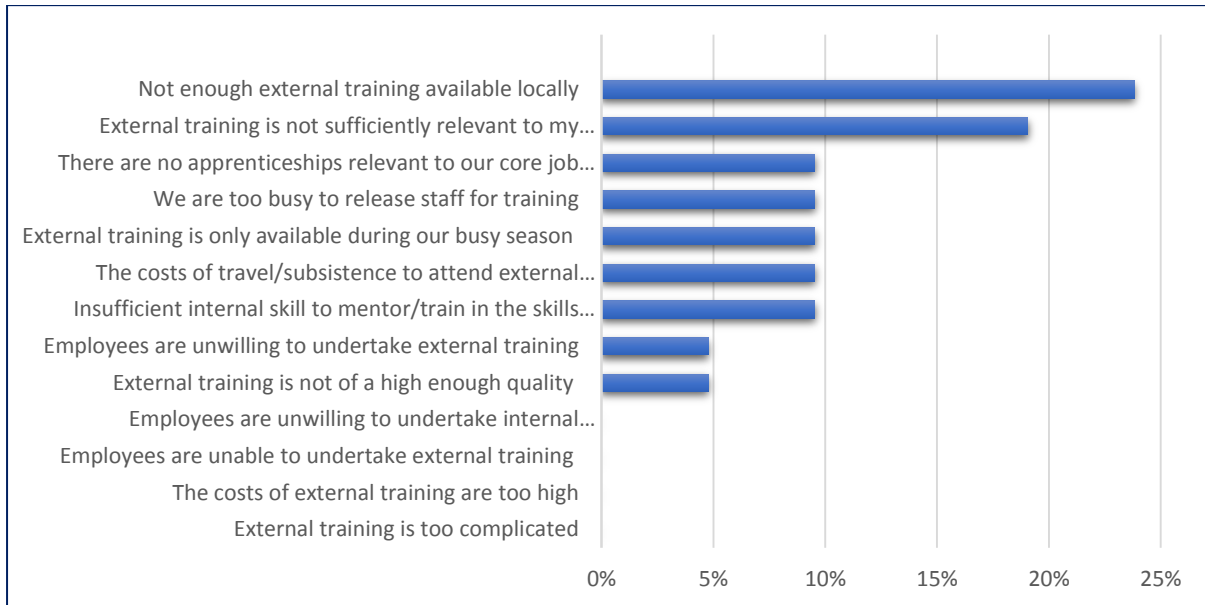
Blackpool College may also be offering the apprenticeship to independent fishmongers in the North of England as far south as Derby. They may partner with another organisation to cover the south of the country.

In spite of this availability of relevant training the employers who responded to the survey pointed to a lack of external training being available locally and a lack of relevance as the two major causes

## Skills, Recruitment and Retention in England's Seafood Industry

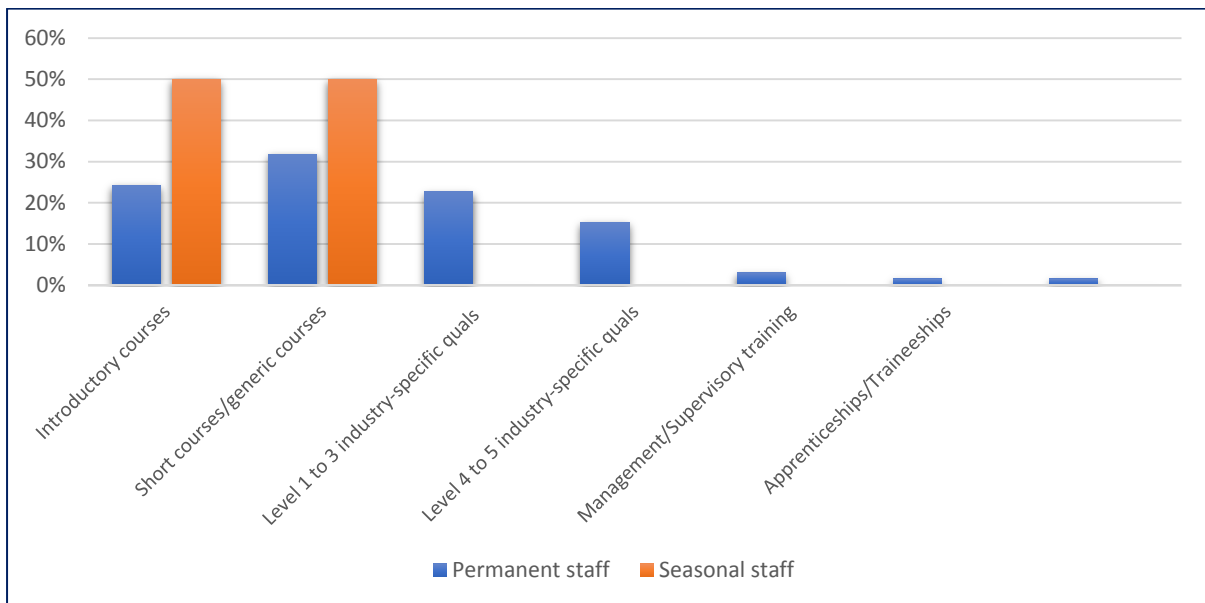
of skills gaps. As shown in figure 105. Most training over the past year appears to have been for introductory and short courses.

Figure 105: Main reasons for skills gaps in England's retail sector



Source Pye Tait survey 2020 Not all respondents felt they could score every reason for skills gaps or give specific responses. In some cases, therefore, there are no responses

Figure 106: Training undertaken in 2018-2019 in England's retail sector

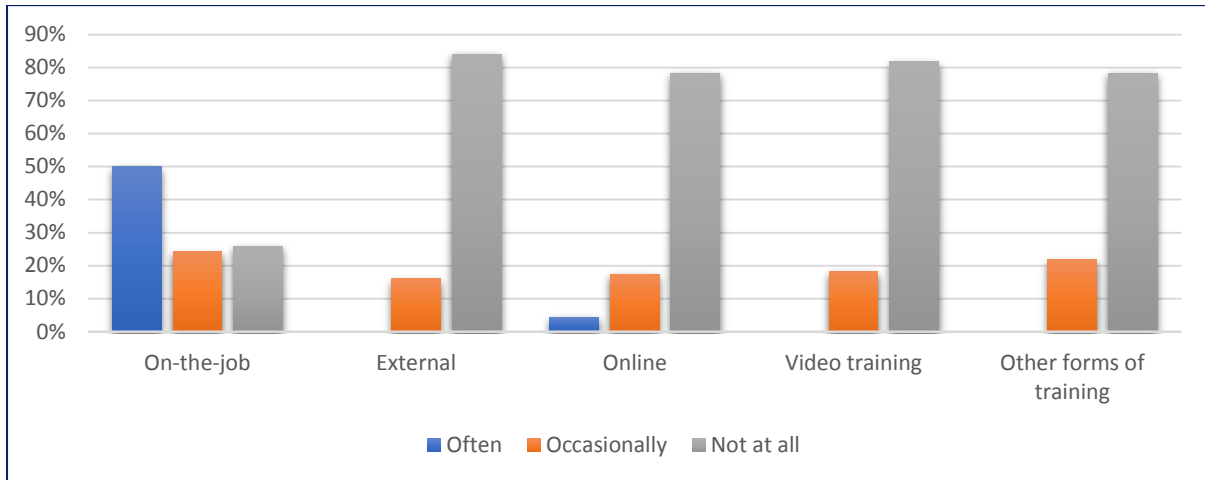


Source Pye Tait survey 2020

## Skills, Recruitment and Retention in England's Seafood Industry

Three quarters of the training being undertaken in the sector is on-the-job – either often or occasionally, as shown in figure 107.

Figure 107: Main training approaches in England's retail sector



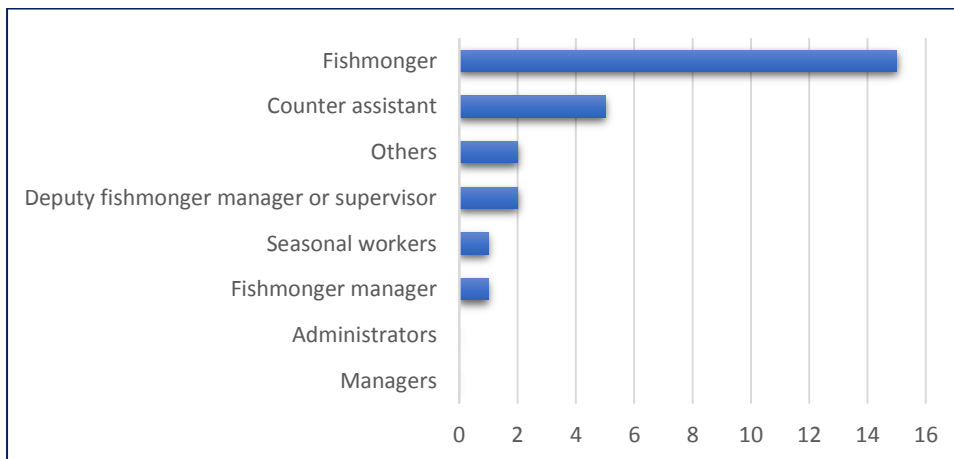
Source Pye Tait survey 2020

### 6.5.4 Recruitment

Respondents reported 26 vacancies in total from a workforce of 324; a turnover rate of just 8%.

Almost 60% of the vacancies were for fishmongers. A very similar pattern was reported for vacancies over the past three years. This picture is mirrored by the responses on hard to fill vacancies which shows that fishmongers form the largest group of people whose roles employers find it difficult to fill.

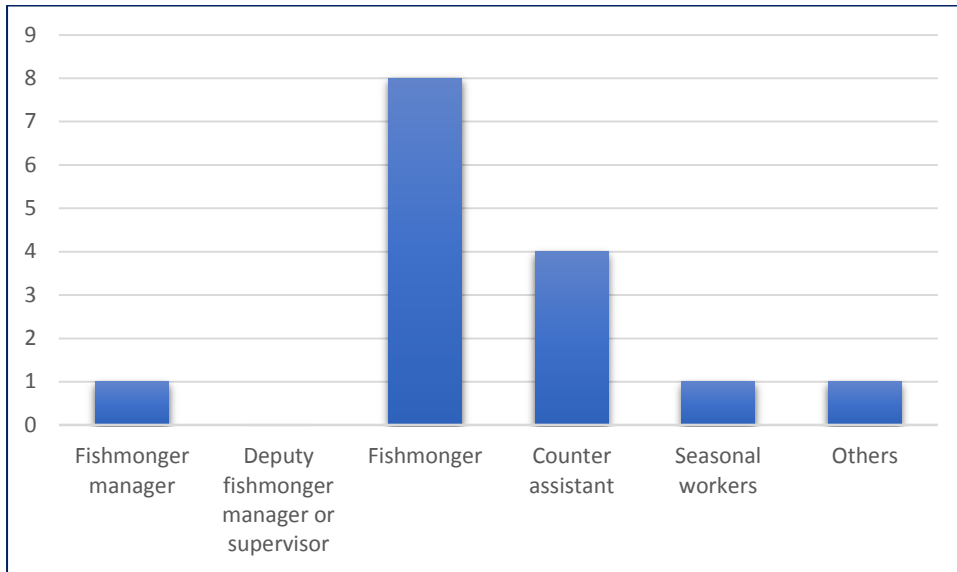
Figure 108: Number of vacancies in 2018-2019 in England's retail sector



Source Pye Tait survey 2020

## Skills, Recruitment and Retention in England's Seafood Industry

Figure 109: Hard to fill vacancies in England's retail sector

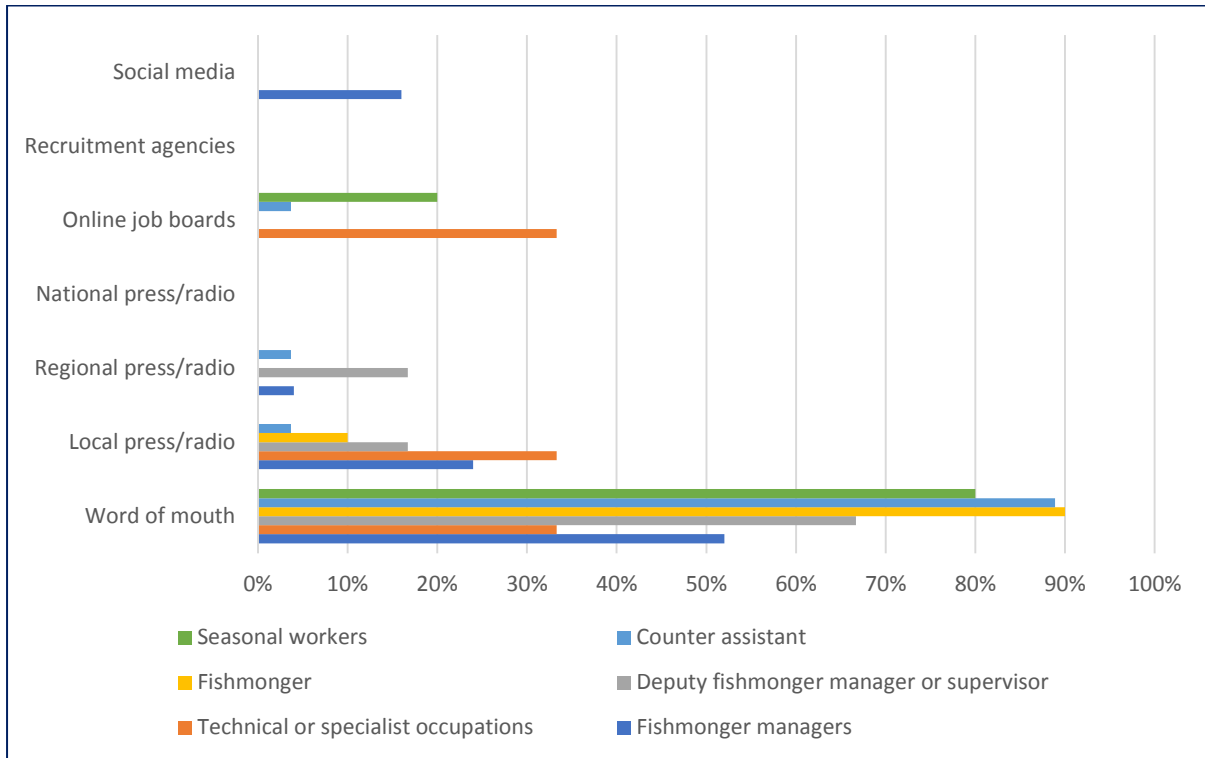


Source Pye Tait survey 2020

Employers appear to use word-of-mouth to recruit almost all types of staff but local press and radio is used for some managerial and technical recruitment. Around a third of recruitment for technical staff uses online job boards. In terms of actual recruitment methods and preferred methods – word-of-mouth is the most important.

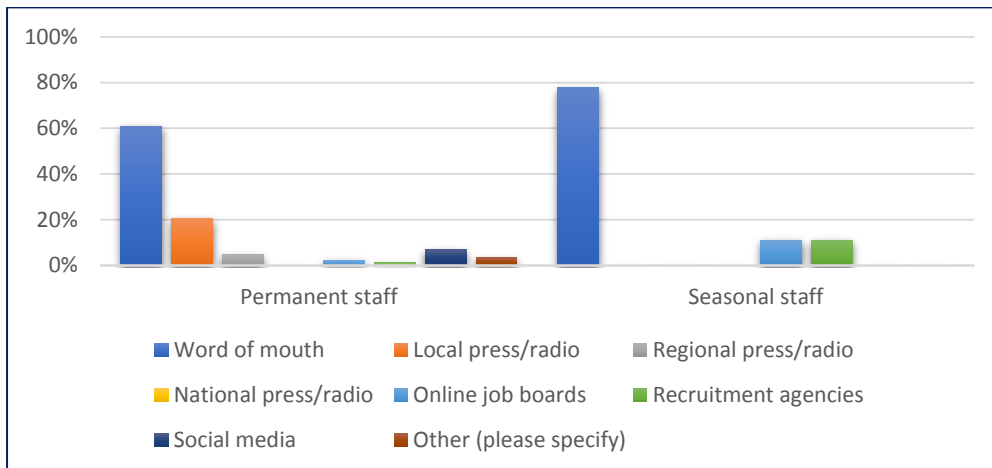
# Skills, Recruitment and Retention in England's Seafood Industry

Figure 110: Recruitment avenues in England's retail sector



Source Pye Tait survey 2020

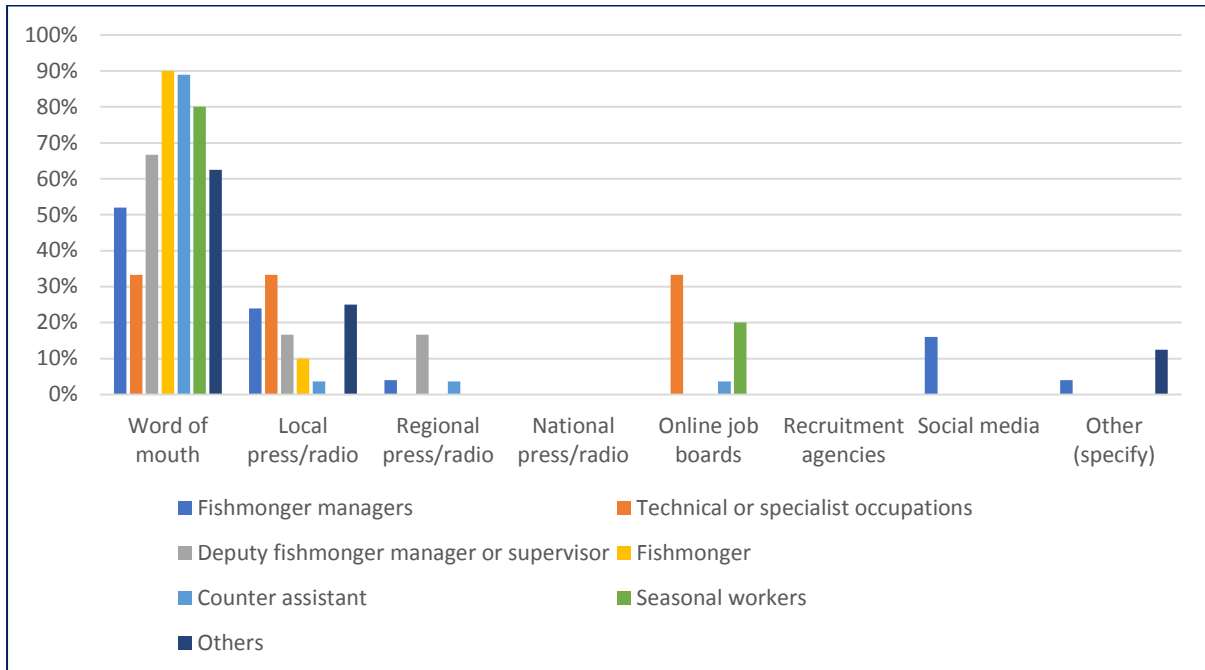
Figure 111: Recruitment methods by type of staff in England's retail sector



Source Pye Tait survey 2020

## Skills, Recruitment and Retention in England's Seafood Industry

Figure 112: Preferred recruitment methods in England's retail sector

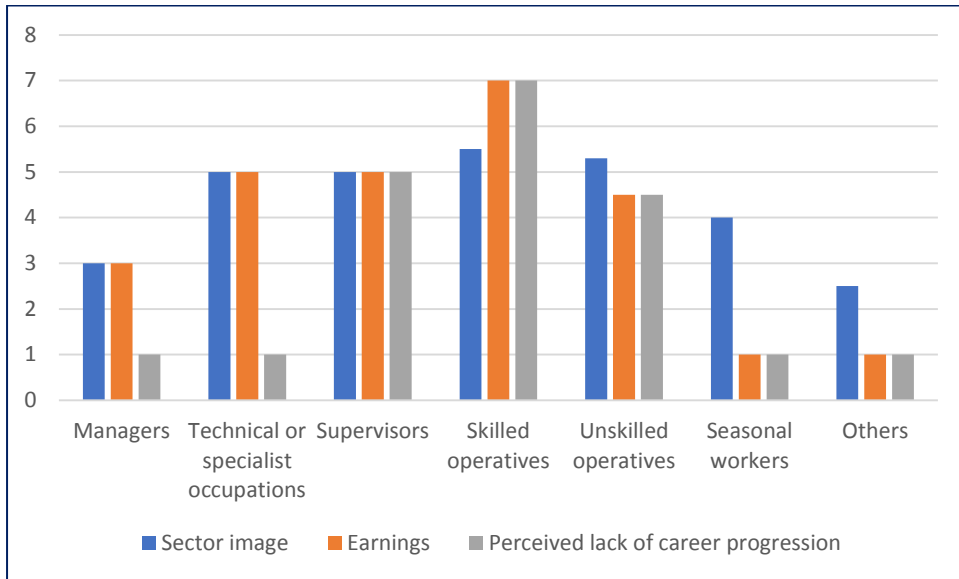


Source Pye Tait survey 2020

Employers see a number of barriers impeding their recruitment of different types of staff. For skilled operatives, for example, lack of perceived career progression and earnings are seen as major barriers. Perhaps more importantly “sector image” is given prominence by employers as a barrier for most grades of staff. The number of employers responding to this question was low.

# Skills, Recruitment and Retention in England's Seafood Industry

Figure 113: Barriers to recruitment in England's retail sector



Source Pye Tait survey 2020

### 7. Review of practices in other comparable nations

As part of the ongoing study we looked at a number of examples of overseas activity in the seafood industry.

Exemplar nations were selected mainly on the basis of two criteria: the overall importance of the seafood industry in each nation and the slightly different educational and training regimes in each. It was felt that a diverse range of background industrial and educational cultures, while restricting the selection to North-East Atlantic countries, would provide the best opportunities for identifying valuable best practice.

Iceland and the Netherlands were recommended by Seafish with signposting to particular areas of interest. The other nations were arrived at by a preliminary web survey of a longlist of nations narrowed down to those with elements of good practice most likely to be of interest to the industry in England.

The objective was to see whether there are elements of good practice which might be of value to England's seafood industry. The explanations and discussion that follow summarise these findings and highlight a number of valuable exemplars. The study looked at the industry in the following nations:

- France
- Germany
- The Netherlands
- Iceland
- Spain

#### 7.1 France

The seafood and aquaculture industry in France can rely on a well-established training infrastructure. The French education/vocational training system offers six dedicated sea fishing qualifications at the entry level, accessible from the ages of 14 and 15. These are taught at a minimum to the equivalent of UK Year nine and Year ten. These qualifications are mainly school based, though training in a professional environment is also part of the curriculum.

The entry level qualifications (*formations initiales*) after school, are approximately equivalent to the UK BTEC and NVQ Level 2 to Level 3 and are offered by twelve maritime colleges, which are situated



## Skills, Recruitment and Retention in England's Seafood Industry

along the English Channel and Atlantic coasts<sup>2</sup>. As of September 2018, approximately 2,000 students were enrolled in the maritime colleges. A large proportion of these were enrolled in qualifications relevant for the catching industry (like *CAP Matelot* – see below), though this figure is not broken down – at least for public access - for each course<sup>3</sup>.

The French training system for marine - or sea fishermen (*marin pêcheur*) is based on a structure of three levels – entry qualifications (*Formations Initiales*), continued/further qualifications (*Formations Continues*) and specific/specialised qualifications (*Formations Spécifiques*). Obtaining higher level qualifications may lead to a higher rank on deck and open onshore opportunities in business management and research. Advancing to degree level is also possible<sup>4</sup>.

In addition, all French entry level qualifications also include weekly PE modules in each year of a course. The necessity of physical aptitude/fitness is a key element in the description of careers in the sector, which are posted on the websites of qualification awarding institutions and career websites (see below).

### Sea Fishing – Formations initiales

Courses usually last between two and three years. Students of 14 years of age (Year nine or year ten) may start with the two-year Sailor Aptitude Certificate in Seamanship - *Certificat d'aptitude professionnelle (CAP) Maritimes de Matelot* or the two-year *CAP Maritime de Conchyliculture* (Shellfish farming).

Students of at least 15 years of age (Year ten) may enrol in the *Baccalauréats Professionnels* (BAC Pro). These qualifications are also open to students who have completed the CAP Matelot. The BAC Pro includes qualifications as Ship Electrical Mechanic (*Electromécanicien Marine*), which enables graduates to not only work in ship maintenance and engineering, but also permits the operation and pilotage of a fishing vessel. Similarly, students may enrol in the BAC Pro specialising in Leadership and Management of a maritime business (*Spécialité conduite et gestion des entreprises maritimes*). This qualification adds commercial aspects and allows work on merchant marine and passenger vessels, as well as fishing vessels.

### General Education and Trade-Specific Education

French qualification systems for seafood include general education like mathematics, French, a foreign language, physical science, government and history and geography amongst others. For instance, for the lowest entry level qualification, the Sailor Aptitude Certificate in Seamanship - *Certificat d'aptitude professionnelle (CAP) Maritimes de Matelot*, general education comprises around 41% (814 guided learning hours out of 1,970 over two years)<sup>5</sup>.

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<sup>2</sup> <https://www.ecologique-solidaire.gouv.fr/organismes-formation-professionnelle-maritime>

<sup>3</sup> <https://lemarin.ouest-france.fr/secteurs-activites/peche/32238-des-effectifs-en-hausse-dans-les-lycees-maritimes>

<sup>4</sup> <https://www.comite-peches.fr/les-pecheurs/formation/>

<sup>5</sup> <http://efpma-martinique.com/certificat-matelot.php>

## Skills, Recruitment and Retention in England's Seafood Industry

In terms of general education, higher level qualifications follow a similar ratio of general and technical education, albeit over three years with more learning hours in the same subjects. The trade specific course content for CAP matelot includes marine machinery and auxiliaries, fishing techniques, seamanship, ship stability as well as Health and Safety. For the BAC Pro qualifications, the trade specific training is expanded, adding ship stability, maintenance and business management<sup>6</sup>. Each qualification also features "training in a professional setting" although it is not specified if this is akin to a work placement.

### Continued Education

After at least six months of seagoing service including navigation responsibilities, these qualifications also open opportunities to attend the one-year long "Capitaine 200" course. This permits working as a skipper on ships with a maximum of 200 gross tonnes and to train sailors within a 20nm limit<sup>7</sup>.

### Career Engagement

The French National Committee of Fisheries provides a description of the industry and its appeal on its website. As such, the website highlights the importance of fishing for global food security, highlighting that three billion people depend on seafood for 15% of their animal protein intake.

*"Fishermen therefore have the mission of feeding other people."*

The website also cites a 2014 survey that confirmed that 94% of fishermen are satisfied with their job. Aside from highlighting the diversity of tasks performed by a fisherman, another section of the website highlights skills shortages, announcing that the industry will need at least 2,000 new recruits at all levels. Career progression is also highlighted, emphasizing that a deckhand may rise through the ranks to become a captain and his own boss<sup>8</sup>.

The Committee has also developed an interactive website, Lignes d'Horizon (Skylines)<sup>9</sup>, which presents the fishing industry and its opportunities with links to information on training and careers. In addition, the website features a three-episode documentary of a 14-year-old girl joining a fishing crew for a catch in the English Channel. In addition, video interviews of fishermen in various roles are featured on the website. Similarly, the description of the marine fisherman profession on a youth career website highlights the diversity of the trade.

Professionals are described as versatile:

*"The fisherman works in a team and may work on deck, in the engine room or in the cargo hold. The fisherman maintains the boat and fishing equipment. He prepares the fishing gear, which is very*

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<sup>6</sup> <http://www.lpma-daniel-rigolet.fr/baccalauréat-professionnel-conduite-et-gestion-dune-entreprise-maritime-bac-cgem-option-pêche>

<sup>7</sup> <http://www.cefc.fr/capitaine-200>

<sup>8</sup> <https://www.comite-peches.fr/les-pecheurs/les-metiers-de-marin-pecheur/>

<sup>9</sup> <https://www.lignes-dhorizon.com/>

*diverse and includes traps, nets, line and trawls. He throws them in the sea, monitors them and hauls them back when a sufficient quantity of fish or crustaceans has been caught.”[...] “He also oversees the running of the trawler and navigation and keeps watch. The preparation of meals can also be the responsibility of a sailor. At port, he unloads the fish for sale”<sup>10</sup>.*

### 7.2 Germany

The apprenticeship for Fisheries in Germany is the 3-year “Fischwirt”, which may be translated both as Fisherman and Fish Farmer. The qualification follows the German “dual” system approach with the apprentice having a full-time job in a business with college-based training (Berufsschule). There are two specialisations, “Aquaculture and fresh-water fishing” as well as “Coastal and high-sea fishing”. The aquaculture specialisation does not involve marine aquaculture, but rather inland aquaculture.

Both strands have core modules focusing on fish biology and species, machinery & equipment, fish catching and processing, weather and environment as well as sustainability, marketing, customer service, business studies and fisheries law<sup>11</sup>.

The Fischwirt apprenticeship is a very versatile qualification, which opens opportunities for careers in all fish-related sectors including catching, aquaculture, fish processing, fishmongering and even “fish administration”, i.e. working for a public authority dealing with fish-related issues.<sup>12</sup> As of 2018, there were 189 Fischwirt apprentices in Germany. This figure is not broken down by specialism<sup>13</sup>.

A Fischwirt may also qualify as a Master Fisherman/Farmer in Coastal and High Sea fishing, a qualification which opens avenues to self-employment and to train apprentices. The curriculum includes practical upskilling in machinery & equipment, fish catching and processing, weather and environment as well as sustainability. Theoretical training in fish biology and species, processing and marketing, business and labour market studies is also included<sup>14</sup>.

There are only two maritime colleges in Germany providing training for the coastal water and high sea fishing apprentice. One covers the North Sea region, serving three German states and one the Baltic Sea region, serving two German states. For aquaculture and freshwater fishing there are more colleges, one per German state (total of 16), which are run by the regional Chamber of Commerce.

### 7.3 The Netherlands

The Dutch have taken a unique and innovative approach to making sea fishing learning materials available to professionals from the sector. The online learning platform Vistikhetmaar.nl (translated

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<sup>10</sup> <https://www.cidj.com/metiers/marin-pecheur#:~:text=Description%20m%C3%A9tier,%2C%20filets%2C%20lignes%2C%20chaluts.>

<sup>11</sup> <https://www.gesetze-im-internet.de/fischwausbv/FischwAusbV.pdf>

<sup>12</sup> [https://www.agrar-jobportal.de/gruene-berufe/fischwirt-ausbildung\\_si1381764702.html](https://www.agrar-jobportal.de/gruene-berufe/fischwirt-ausbildung_si1381764702.html)

<sup>13</sup> <https://de.statista.com/statistik/daten/studie/324826/umfrage/auszubildende-zum-fischwirt-in-deutschland/>

<sup>14</sup> <https://berufenet.arbeitsagentur.de/berufenet/bkb/390.pdf>

## Skills, Recruitment and Retention in England's Seafood Industry

as 'I fish I know')<sup>15</sup> is a knowledge exchange platform, developed by the ProSea Foundation (a Dutch private training provider specialising in maritime awareness and sustainability) and commissioned by the Dutch Ministry of Economic Affairs. It provides learning resources and teaching materials for professionals from all sectors of the fishing industry. The platform has a broad range of online course content – from mussel fishing to fish processing and care of fish.

There are also modules on marine ecology, environment and different trawling techniques. Users can choose the modules they want to learn and put together their own curriculum. They can share their work in PDF form. The website essentially allows fishing professionals to draw on a wide variety of online course content to tailor make their own training course in sea fishing. It is a user-oriented, digital knowledge bank through which a wide range of professionals in the fishing sector can put together their own tailor-made online courses and curricula.

### 7.4 Iceland

Iceland has a long tradition of sea fishing stretching back to before Viking times and, today, strongly emphasises health and safety and survival training for its fishermen. Established in 1985, the Icelandic Maritime Safety and Survival Training Centre provides mandatory safety training to all seafaring fishermen. According to national law, it is mandatory for all seamen to attend those courses. The knowledge imparted by the centre has, among other things, resulted in a considerable decrease in the number of serious accidents and deaths at sea in recent years.<sup>16</sup> The last recorded fatality in Icelandic waters was in 2016.

In a continued commitment to maritime safety, since 2003, Iceland has implemented compulsory five-year refresher training for fishermen employed on vessels over 15 metres. From 2011, this refresher training has also been compulsory for fishermen employed on vessels under 15 metres in length<sup>17</sup>.

Related courses are offered by the Icelandic Association for Search and Rescue and include:

#### Maritime Safety and Survival Training Centre courses

Group	Vessels	Course	Length
Fishermen	6 - 15 meters	Small craft safety course	1 day
	-	Refresher course	Half a day
	>15 meters	Basic Safety Training STCW -VI/1	5 days
Merchant	-	Refresher course	2 days
	>6 meters	Basic Safety Training STCW -VI/1	5 days
	-	Refresher course	2 days

<sup>15</sup> <https://www.vistikhetmaar.nl/>

<sup>16</sup> [www.icesar.com/search-and-rescue/sar-at-sea/maritime-safety-and-survival-training-centre](http://www.icesar.com/search-and-rescue/sar-at-sea/maritime-safety-and-survival-training-centre)

<sup>17</sup> Source – PyeTait Consulting email correspondence with the Icelandic Association for Search and Rescue

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Officers fishing during education	>24 meters	Advanced Firefighting	4 days
	>45 meters	Proficiency in survival craft	3 days
Officers merchant		Advanced Firefighting	5 days
		Proficiency in survival craft	3 days

Iceland is also a good example for provider-business cooperation as well as international cooperation in qualifications. In 2019, a consortium featuring the Icelandic School of Fisheries, Trondheim and Stavanger Fishing Colleges and the University of Holar (all in Norway) and the Icelandic salmon farming companies Arnarlax and Arctic Fish introduced a qualification in Fish Technology Studies, specialising in Aquaculture<sup>18</sup>.

### 7.5 Spain

As part of the cooperation, all training providers supply training materials and expertise. The facilitation of training modules is either class-based or done remotely.

*“The aim of the program is to increase the expertise of staff on aspects that all aquaculture companies are working on. To achieve this, the anatomy of fish, the objectives of aquaculture, aquatic and environmental science, fish disease and health, fish feeding and nutrition, quality management, technical issues in operations will be examined and safety will be examined”.*

A total of 28 employees from both companies enrolled in the programme in November 2019 and are due to finish in late 2020.

Roles on Spanish fishing vessels are highly regulated. To work on-board Spanish fishing vessels personnel must hold a valid title.

The (translated) protected titles are<sup>19</sup>:

- **Bridge Section:** Fishing Captain; Height Pattern; Coastline
- **Multi-purpose:** Multipurpose Coastal Pattern; Local Fishing Skipper; Sailor Fisherman
- **Machinery Section:** Senior Naval Mechanic; Naval Mechanic

The most junior general title is Sailor Fisherman. The qualification is the pre-requisite to starting as a junior deckhand on a Fishing Vessel or in an aquaculture business. The qualification allows Sailor Fishermen to command a FV of less than 10m in length within the 12nm boundary after a minimum of six months of working as a deckhand/engineer or both.

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<sup>18</sup> <https://www.fiskt.is/is/um-skolann/frettir/nytt-namsfarmbod-a-islandi-fyrir-starfsmenn-sem-vinna-vid-fiskeldi>

<sup>19</sup> [http://www.caib.es/sites/formacio/es/patron\\_costero\\_polivalente-58936/](http://www.caib.es/sites/formacio/es/patron_costero_polivalente-58936/)

From the age of 16 a student may obtain the qualification. Training involves 23 guided learning hours (15 hours in theory and eight hours of practical training)<sup>20</sup>. The training modules cover a considerable range of areas, including vessel control, maintenance and conservation<sup>21</sup>.

Progression to Multipurpose Coastal Pattern for example is by proof of experience and formal examinations. The title allows holders to act as the first officer or officer in charge of the navigational watch on vessels dedicated to coastal fishing, with less than 750kW power; act as Chief Engineer on vessels under 550kW; and act as Skipper of fishing vessels of up to 24 metres and 400 kW. The experience stipulated for this role is '12 months as an officer in charge of the navigational watch or skipper on fishing vessels of length not less than 12 metres.

By setting out the roles and titles, potential entrants are given clear progression routes in the industry and what is required of them at each stage. By giving a title to the most junior role – Sailor Fisherman there is a very visible 'foot on the ladder' from which to launch a career in fishing. This is an accessible title involving 23 guided learning hours.

### **Fishmongery**

Independent fishmongers account for a third of fish sales in Spain; the national federation - Fedepesca<sup>22</sup> has represented this network of small fishmongers since 1978. On the one hand, it represents and defends the interests of the sector, including suggesting amendments to regulations. On the other it executes projects that contribute to maintaining competitiveness through training, innovation, promotion or the use of new knowledge and technologies.

Fedepesca is looking to boost the use of new technologies and apps in the sector. Social connectivity in real time, multiple sales channels including traditional and on-line, and the provision of services are all strategies that are being adapted to the fish retail sector. The sector in Spain is being encouraged to add value with e.g. ready to eat meals, and to add to the retail experience with tastings and workshops. Fedepesca encourages cooperative ventures citing La Paz market in Madrid which was the first fish retailer to work with Amazon.

Fedepesca recognises the challenge of upholding fish consumption in Spain and maintaining the status of traditional fish retailers as one of the main outlets for fish sales. 'Automation, innovation, training, and professionalisation of the entire fisheries and aquaculture value chain', are seen as the way forward.

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<sup>20</sup> [https://www.escuelamaritima.es/sites/default/files/10%20MARINER%20PESCADOR%20info%20sRD36-2014\\_1.pdf](https://www.escuelamaritima.es/sites/default/files/10%20MARINER%20PESCADOR%20info%20sRD36-2014_1.pdf)

<sup>21</sup> [https://www.gva.es/es/inicio/procedimientos?id\\_proc=13852&version=amp](https://www.gva.es/es/inicio/procedimientos?id_proc=13852&version=amp)

<sup>22</sup> <https://www.eurofishmagazine.com/sections/fisheries/item/333-breathing-new-life-into-an-old-tradition>

Collaborating on efforts to disseminate information about the value chain, the products, sustainability, and the role of women, are also important activities. Recent publications include advice on home deliveries and van sales during the Covid-19 pandemic<sup>23</sup>.

While the retail sector in Spain has bold ambitions it has difficulty recruiting younger workers, it is looking for individuals skilled in digital marketing, new technologies, business and project management, and attributes recruitment difficulties, at least in part to the Spanish professional training scheme, which does not place value on artisanal professions<sup>24</sup>.

### 7.6 Summary

Comparing industries and training systems across national and cultural divides is fraught with difficulties, not the least of which is the superficial attractiveness of being able to spot valuable nuggets which might be used in one's own national setting.

The fundamental problem of course is that each education and training system is based on a unique history and culture and is set within unique political and commercial environments.

Having said that, there are examples for England's seafood industry and the wider UK in some of the aforementioned nations and their systems.

#### 1. Disaggregation versus Integration

The UK system is a disaggregated one which is relatively informal, and which relies on individuals collecting a series of small-scale qualifications or certificates for very specific elements of the job roles in seafood.

In the catching sector for example, England does not have the sets of lengthy, formal training systems and qualifications that the French use. Deckhands on English vessels are required to take four compulsory courses, then they learn on the job, becoming highly skilled, but have no opportunity to gain formal accreditation of their level of skill.

Each of England's Seafood sectors possesses established and effective career pathways to positions of high levels of competence and responsibility. While offering the same progression and learning pathways almost all, however, lack the clarity of many European systems. Young people in France and Germany, to take just two examples, are able to plot a career-path based on established and easily-identifiable qualifications at nationally-regulated levels of attainment. In France a young person is able to see not simply a career and qualification progression from school (Entry) level through Level 2 and 3 qualifications to leadership, management or commercial roles, but a clear

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<sup>23</sup> [Fedepesca-guidance-for-fish-delivery-Covid19](#)

<sup>24</sup> [Euro-fish-magazine-2018](#)

indication of “status” in the pathway. A deckhand on a trawler from Brest knows, for example, that they are a Level 3 profession with possible career routes to Level 4 and higher. In England a

deckhand is often regarded as unskilled. Many are classified in SOC Major Group 9 which describes its occupations as largely unskilled and as including general labourers.

England's disaggregated qualification and career patterns may not impact on final competence levels but they have major impacts on the way in which different occupations and trades are regarded by potential recruits, teachers, careers advisers and parents.

### 2. Qualifications as Status

It is difficult in the English and wider UK context to demonstrate the high skill level of aquaculture specialists, processor operatives, fishmongers and catchers. This is due to the fact that each job role has only a single or a set of certificates which each rate level 1, 2, 3 or 4. A skipper of a medium-sized fishing vessel, for example, may possess a long list of certificates each of which rates no higher than level 2 or 3 but which, taken as a whole, for a decidedly highly multi-skilled job almost certainly rates Level 5 or 6. A trainee marketing executive who emerges from University with a degree (of whatever class) is regarded from day-one as being a Level 6 employee (and the role can be classified as such by the employer and by government statistical systems). The skipper of a fishing vessel, who will possess multiple qualifications and high skills, very significant experience, and who has the responsibility of safely taking a valuable asset plus several human lives hundreds of miles out to sea, is “rated” at Level 3.

There is a tendency – built fairly solidly into British industrial culture – to regard qualifications as window-dressing for the much more important and substantive attribute of “experience”. There are strong arguments to support this view but the fact remains that young people and recruits in the second decade of the twenty-first century regard qualifications as being of major importance and the status they provide as a crucial element of a career choice.

### 3. Holistic Job Roles

It is important to understand, here, that the nations we studied as comparators almost certainly deliver very little difference in ultimate substantive skill in any sector when compared to the English (and UK) systems. An experienced English processing manager, fish fryer, fishmonger, skipper, or aquaculture manager will arguably possess all the competence of their French, German or Spanish equivalents. There may be differences in specific skill or knowledge areas but the main difference will be that European systems are “holistic” in the sense that the whole of each job role tends to be contained in the learning and qualifications for that occupation and level – they demonstrate very clearly the skill content and level of the job as a whole. For example, the French system for fishermen is fully focused on the profession. It comprises entry level qualifications from the age of 14, further qualifications at level 3, specialised qualifications with the possibility of advancement to degree level. Each qualification can be plotted on a career pathway and each defines the level of competence for French fishermen.



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We have not found any reliable comparison between the overall competence levels of (say) French, German or Spanish deckhands as compared to those working on English boats but France and Germany operate much more integrated systems for fishing than we do in England and perhaps

more importantly they pay detailed attention to the whole job from the basic skills (e.g. deckhands and including the commercial elements of pricing and marketing) to senior management and marketing.

The job roles are imbibed in a single, longer course which is almost invariably college based and then supplemented by practical experience and other courses as necessary. Most levels of trainees learn not only the fishing and catching skills but navigation, electronics and – most importantly – business management and marketing.

#### 4. Online Approaches

Seafish already makes effective use of its website and of video training. The Dutch website Vistikhetmaar.nl ('I fish I know') has similar resources to Seafish, but it also has an interesting added feature by which users can easily compile a training curriculum and share it with learners. Users create a list of materials add an explanation to this, then they receive a link to their online curriculum and a PDF that learners can download.

#### 5. Innovation in Retail

Fedepesca in Spain made a concerted attempt to drive innovation in fish retail, encouraging the sector to adopt new technology and develop new sales channels. Demand for new training courses and approaches in the more disaggregated English system has to derive from the industry but there may be great value in industry organisations undertaking work to mirror the Fedepesca approach by identifying valuable innovation and technology and further encouraging the sector to adapt and expand its sales channels

### 8. Covid-19

The UK was put into a stringent lockdown on 23 March 2020 to control the spread of the Coronavirus. Most of the retail and hospitality sectors were immediately closed. This included restaurants, pubs, hotels and 'non-essential' retail. Schools were also closed. Supermarkets, which remained open saw a wave of panic buying and had difficulties keeping pace with the increased custom. In response, a few supermarkets closed fresh fish counters in order to use the staff to re-stock shelves resulting in some aquaculture producers feeling an immediate impact.

Pye Tait's fieldwork, including a telephone survey of 288 employers in aquaculture, catching, processing, fish frier and retail started on 23 March and ran until 1May. Primary data across a wide section of the industry were, therefore, being collected as the impacts of the Covid-19 virus were developing.

#### 8.1 Initial Reaction

The early reaction across England's seafood industry was one of deep shock, particularly in retail and fish frying where most businesses closed their doors. Aquaculture businesses and catchers saw an immediate fall off in demand as restaurants and hotels ceased ordering and export markets were closed. Similarly, processors whose main markets were in hospitality saw an immediate drop in business.

Employers in all sectors put recruitment on hold, laying off staff, concerned that their businesses would not survive the pandemic. Expansion plans and staff training immediately slipped down the list of priorities and employers who had been working on opening up new export markets ceased or postponed that work.

We found that there was wide awareness in the industry of the furlough scheme (whereby the Government pays 80% of the earnings of furloughed employees) but this was not launched until 20 April. The comments below are from telephone interviews in the first week of lockdown. They illustrate the sense of the enormity of what was happening and the scale of the impact of the virus on certain businesses in England.

*'We export our whelks to South Korea and shrimps to Holland. Sales chain has dried up because of Coronavirus.'*

**Catcher**

*'We have currently had to lay off the majority of our staff due to the Coronavirus. We do not know what will happen when things get back to normal.'*

**Fishmonger**

*'Due to Coronavirus we had to isolate our skilled fish processors who hopefully will receive 80% government wage support. Lost two thirds of hotel and restaurant business already. Everything is up in the air.'*

**Processor**

### 8.2 Adapting

As the Coronavirus crisis deepened, processors and fishmongers were reporting difficulties in obtaining supplies of fish. Businesses began to take up Local Authority business support grants of £10,000, as well as Business Interruption Loans. Interviewees indicated these would be a short-term fix. At the same time many employers were continuing to furlough all or part of the workforce.

In a somewhat unexpected effect of the pandemic, aquaculture businesses began experiencing problems with fish welfare and had concerns about selling fish that were becoming oversized for restaurants. Some reported difficulties sourcing feed.

*'Coronavirus has considerably slowed down the restocking market and caused animal welfare issues. Our business is mainly supplying the table market. Large trout can be filleted but restaurants prefer small whole fish. We currently have a lot of farmed fish that are being over fed because we can't sell to the restaurants and shops that have been forced to lock down.'*

**Aquaculture**

However, after the initial shock of the Coronavirus, English businesses started to adapt and innovate in order to survive. Fishmongers, catchers, processors and some aquaculture producers began to operate home delivery services or, where they already did this, to expand them. Some told us that they were recruiting additional van drivers and even buying or renting extra vehicles to support these ventures.

Fish friers began to operate click and collect services. Some fish friers were also having to learn processes for accepting electronic payments, both to support click and collect operations and to avoid handling cash in future counter sales. We spoke to fish friers who had started operating home delivery services, but there were concerns that margins wouldn't support this. Those with restaurant businesses were unable to re-open them but a few told us that they were operating click and collect.

Stakeholders reported that some larger fishing vessels were tied up for the duration, but smaller vessels, supplying a mainly local market, were carrying on fishing. Smaller catchers were suggesting they might take up fish processing training to enable them to sell direct in the future. There were other areas of optimism:

*'Because I both catch and sell fish to the public and there are no restrictions, my fish retail business is booming.'*

**Fishmonger**

Nevertheless, a minority of employers in all sectors told us that they would need grant funding to enable their businesses to recover from the pandemic. Some suggested they would need financial management training to help them plan their recovery.

In late April the Government committed £10m in support to the fishing and aquaculture sectors. About 1,000 fishing and fish-farming businesses are expected to benefit. Vessels up to 24 metres in length – small to medium-sized boats – which recorded catches worth at least £10,000 last year are eligible for a share of the main £9m fund. A further £1m will be for schemes to help fishermen sell their catch in their communities.

### 8.3 The Legacy

There is absolutely no doubt that the Covid-19 pandemic will leave a deep and lasting legacy. There are businesses that may not survive the disruption and others that may fail during the recession which is predicted to follow it.

Many businesses have run down any cash reserves during the course of the pandemic and the struggle to stay in business. Many others will have Business Interruption Loans to pay off. There are fears that business failures may affect these companies further into the near future and will have impacts up the supply chain. Some hotels and restaurants may never re-open. Demand may change, businesses supplying 'luxury' seafood e.g. lobsters and oysters might take longer to recover than others.

*"The main problem I have at the moment is that I have supplied a lot of retailers with fish and I do not know whether or not I will get paid. This may mean that I may have a financial problem going forward. I have had to lay-off some staff due to the corona virus. I think there will be a lot of retailers facing bankruptcy when this is over."*

***Fish wholesaler/retailer***

Expansion plans and staff training may well be put on hold for some considerable time as businesses try get to grips with the "new reality".

### 8.4 The New Reality

No one, not even the government, can predict what the world will look like in the next twelve months, or the next two to three years. The pandemic has had impacts and has set in train changes which will cast their shadow over the future of England's seafood industry in many different ways.

There will, of course, be many business failures and redundancies. But there will also be businesses which have not only learned to adapt to the situation but which will take those lessons into the future to build bigger and better (but different) businesses.

While fish friers and retail were badly hit, the lasting impacts may well be greatest in the processing sector where social distancing and the need for extreme care with physical production facilities may

create the need not only for innovative thinking but drastic changes to the way in which productivity is maintained and improved.

In many ways the Coronavirus has led to an acceleration of change in the industry, with a move towards click and collect and online sales, home deliveries, home working, and an accelerated adjustment to and adoption of new technology. These are likely to stay in place and change the way the industry operates in profound ways.

Businesses that have successfully innovated during the pandemic appear to have been those which used new technology to leverage home working and communications. They are also those which have close relationships with their customers and were able to keep in touch, rapidly publicise home deliveries, quickly develop online sales and click and collect, often through social media and effective websites.

As a result of Coronavirus, the UK is predicted to move from a period of almost full employment to possibly 3 million plus unemployed. Hence the available labour pool that the seafood industry can recruit from will be much larger.

Several retail chains have already announced redundancies; high calibre people with the digital skills forward-looking seafood retail and fish frier businesses need, will be on the jobs market. These people may be key to driving these sectors' digital future.

Following redundancies in manufacturing, processors will find people with shortage skills e.g. engineering will be available. Similarly, those businesses looking for unskilled operatives will have a wider talent pool to choose from, and existing staff will be less likely to leave.

High calibre industry changers will bring new ideas to the seafood industry and a wealth of skills,

The recovery from Covid-19 will be against a backdrop of the UK's exit from the EU. It is not possible to predict the outcome of Brexit negotiations with certainty. There is likely to be growth due to increases in domestic fishing quota which could be accompanied by tariff or other barriers limiting exports to the EU alongside retaliatory tariffs restricting EU access to the domestic market.

The prospect of growth is a powerful lure to potential employees, all sectors should capitalise on this; recruitment efforts aimed at newly redundant industry changers should stress the opportunities in the post-Brexit seafood industry.

The availability of training to enable smooth transition from other industries would also be an attraction for those considering a move into the seafood industry.

### 8.5 Covid-19-Related Recommendations

Perhaps the most pressing things that the industry will have to deal with over the next 12 to 24 months will be the adaptation to new ways of working. This is for two reasons – firstly because the

## Skills, Recruitment and Retention in England's Seafood Industry

continued presence of the virus may necessitate such methods, but mainly because they offer greater efficiencies and higher productivity.

We would therefore recommend specific Covid-19-related action to:

1. Support and underpin business development in terms of managerial and financial training;
2. Offer new or additional marketing courses to help businesses adjust to social media, online sales, and online communications;
3. Develop and offer new courses in customer relationship management;
4. Train businesses in the effective use of a web presence including SEO and website analytics;
5. KFE already provides click and collect training but there may be a need to expand this type of offer to other sectors and to wider audiences;
6. In the rapidly changing situation, accurate and easily accessible information is key. The Seafish website and newsletters should continue to focus on this, with a core role of translating government and official guidance on e.g. social distancing and approved ways of working so they are relevant to each sector of the industry.
7. Catchers and aquaculture producers will be looking at new revenue streams and new business models, selling direct to retailers or the public. £1m of the £10m Government support package was to enable fishermen to explore selling direct to local communities. There will be a demand for training in small scale processing, food hygiene, customer relations, and marketing to support this.
8. Training should be adapted to enable industry changers to transfer to the seafood industry. This may be e.g. short courses for engineers moving into processing or just more effective mentoring aimed at operatives from other industries.
9. The industry should develop messaging, which predicts post Brexit growth. Employers should be encouraged to use this to appeal to high calibre industry changers.

To an understandable extent the issue of Brexit has been overshadowed by the advent of the Covid-19 pandemic. The UK's exit from the European Union, which we joined as the European Economic Community (EEC) in 1973, is due to be formalised in December 2020. The exact effect of our departure on the Seafood industry is difficult to predict, but no sector will be unaffected; fishing quotas, the availability migrant labour, and trading terms for imports and exports are all currently uncertain.

*Becoming an independent coastal state after Brexit will give the UK the right to decide who fishes in our waters and on what terms*

**Defra spokesman**

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In the processing and catching sectors, employers rely to varying extents on foreign labour and there is uncertainty at the time of writing as to what will happen regarding the movement of labour between the European Economic Area and the UK.

Many employers told us that they would like to be able to hire local labour (i.e. that available in England) if they could get it but there have been structural difficulties for many years which have restricted the availability of UK-based labour. Sectors such as catching and processing suffer from misperceptions in the potential labour market of them being “dirty” industries and, in the view of employers this has hindered recruitment from local sources. Both the frying and retail sectors have been impacted by similar structural issues and, for all, the answer has lain in the import of workers from EU and EEA nations. The issue of the free movement of labour is therefore of significant import for the seafood sector as a whole.

As things stand the approach seems to be moving towards a “points-based” system which will permit suitably qualified professional and workers who are filling a shortage situation to enter on working visas. However even in the latter category it seems likely that there will be a requirement for at least Level 3 skills.

Our research found a good deal of qualitative and anecdotal feedback about Brexit along the lines discussed above but in answer to specific questions about the impacts of Brexit almost all sectors were clear that it has had and will have no, or minimal, impact on business. Reticence about future implications for the industry could be due to uncertainty about the final terms of the UK's exit from the EU, combined with a tendency for employers to adopt a ‘wait and see’ attitude while focusing on immediate issues.

It is also important to recognise that labour is not the only concern of the seafood industry where Brexit is concerned. The terms of trade between the EU and the newly independent UK are of great importance. The most likely outcome at present appears to be a return to the international trade rules as established by the World Trade Organisation (WTO). This will require the payment of standard duties on all trade between the EU and UK. There is a chance however that a more sensible approach will be agreed – but probably not by December 2020 – which will move towards a free-trade agreement between the two.

Where recruitment is concerned almost all seafood sectors expressed little concern as to the impact of Brexit. The sectors which expressed the greatest anxiety were processing and catching but proportions of employers believing that Brexit would make recruitment more difficult were, nevertheless quite low. In the processing sector just under 10% of employers said that Brexit will make recruitment slightly more difficult over the next twelve months. The equivalent figure for the catching sector is 14% of employers.

With the exception of these minorities in the two sectors mentioned above, the vast majority of employers across England's seafood industry are not anticipating major impacts from Brexit (**Error! Reference source not found.**).

## Skills, Recruitment and Retention in England's Seafood Industry

Table 4: Impact of Brexit by Sector in England

	Brexit has had no impact over past 12 months (%)	Brexit will have no impact over next 12 months (%)	Brexit will make recruitment slightly more difficult in next 12 months (%)
<b>Aquaculture</b>	94	94	6
<b>Catching</b>	85	84	14
<b>Fish Fryers</b>	98	98	2
<b>Processors</b>	88	85	9
<b>Retail</b>	97	97	3

Source Pye Tait survey 2020

The departure of the UK from the EU was always regarded as desirable by the catching sector, which has experienced severe problems from EU fishing quotas and common rules for fishing areas, Under the Common Fisheries Policy (CFP) EU countries have access to each other's waters, except for twelve nautical miles from coastlines (the internationally accepted "Territorial Waters").

A further issue is the way in which the UK's exclusive economic zone (EEZ)<sup>25</sup> will be interpreted. The definitions and rules are complex but, broadly, the EEZ extends out for 200 nautical miles and theoretically the UK could keep all such waters for its own fishing fleets in a similar way to the Icelandic approach. This issue is yet another unknown at the present time but exclusive access to a 200 mile sea-zone around the UK would make a significant difference to the British catching sector and would have positive implications for associated sectors such as processing, fish frying and retail.

EU diplomats have made it plain that this is not something they would wish to see and that everything in future negotiations is linked (i.e. that they wish to see the UK being flexible on such matters if the UK wishes to have flexibility in access to EU markets in other industrial and commercial sectors.

For example, restricting EU access to UK waters could lead to retaliatory action on UK fish exports to the EU. Exports and imports of seafood products within the EU Single Market are currently without tariffs and involve minimal paperwork. Much of the fish caught by English vessels is exported, mainly

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<sup>25</sup> The EEZ, prescribed by the 1982 United Nations Convention on the Law of the Sea, is an area of the sea over which a sovereign state has special rights regarding the exploration and use of marine resources, including energy production from water and wind. The "territorial sea" gives full sovereignty over the waters, whereas the EEZ is a "sovereign right" below the surface of the sea.



to the EU. Therefore, in the absence of alternative markets, any action by the EU to impose tariffs on exports may have wide reaching effects on the English industry. Similarly, any increased documentation will impose costs on the industry, and subsequent delays at Border Inspection Posts could make some seafood exports impossible.

Tariffs or other action to limit exports to the EU could be followed by the UK government imposing tariffs on EU exports of fish to the UK. This would see the English industry catching more fish, having limited or different export markets, and a potentially an increased domestic market. The industry would be faced with the marketing challenge of switching domestic consumers from imported species to those caught in domestic waters; together with the challenge of seeking new export markets.

The outcomes of diplomatic negotiations during 2020 (and beyond) are unknown but it is very clear that the seafood industry will have to prepare itself for a number of different results and that preparing for new export markets and a degree of growth are very sensible approaches which will be advantageous regardless of the UK-EU outcomes in the Brexit negotiations.

## 9. Seafish Regions

Findings for the English seafood regions of South East and London; South West; and Yorkshire and Lincolnshire largely followed national findings. Brief highlights for each region are provided below.

### Yorkshire and Lincolnshire

During the course of the fieldwork Pye Tait surveyed 48 employers in Yorkshire and Lincolnshire by telephone, the sector breakdown is shown below. Stakeholders and employers from the region were also involved in depth interviews and nominal groups. The Yorkshire and Lincolnshire region includes Humberside.

*Table 5 Yorkshire and Lincolnshire telephone survey*

Sector	National	Region
Aquaculture	17%	15%
Catching	17%	10%
Fish fryer	16%	27%
Processing	27%	38%
Retail	22%	10%

The relatively high proportion of processors surveyed reflects the concentration of processors in the Humberside area. One local stakeholder spoke of '5,000 people employed in processing on Humberside within a fifteen-minute drive'.

### Findings

#### Employment

- Reliance on foreign labour EEA and non-EEA
- Facing uncertainty – free movement of labour, trade barriers, quotas
- Difficulties attracting new entrants, particularly young people
- Perceived as an unpleasant working environment – processing, catching
- Resources are tied up in recruitment
- Major employer in some areas

The industry is a major employer in some parts of the region, with several generations of some families having worked in the processing sector for example. Employers in Yorkshire and Lincolnshire face similar problems to those in other regions when trying to attract young people; the working environment is perceived as unpleasant, and it involves hard work and sometimes unsocial hours. Processors and catchers rely on migrant labour and face uncertainties around free movement of labour post Brexit.

### Training

- Training is driven by mandatory requirements
- Difficulties releasing staff for training
- Much training is on the job
- Future need to train a more technical workforce
- Video training works well
- Managers, middle-managers and supervisors have little management training
- Mentors are used but are untrained

The main form of training used by employers - on the job training is used -

- occasionally by 49% of employers in the region for permanent staff, compared to 40% of employers nationally
- often by 44% of employers in the region compared to 52% nationally.

*Table 6 Yorkshire and Lincolnshire on the job training*

Frequency	National	Region
Often	52%	44%
Occasionally	40%	49%
Not at all	8%	7%

Employers in the region make extensive use of on the job training involving formal and informal systems of mentoring. There were suggestions that supervisors in the processing sector would benefit from managerial training. There were similar suggestions for mentors who are used extensively but rarely trained.

External training is used occasionally by just over half of employers surveyed in the region compared with 39% nationally.

*Table 7 Yorkshire and Lincolnshire external training*

Frequency	Nationally	Region
Often	3%	0%
Occasionally	39%	52%
Not at all	58%	48%

The survey revealed that 37% of employers surveyed in the region have workforce development plans in place, which compares with just under 30% nationally.

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Table 8 Yorkshire and Lincolnshire workforce development plans

Workforce development plan	Nationally	Region
Yes	30%	37%
No	70%	63%

Yorkshire and Lincolnshire stakeholders and processing employers felt the workforce will need to develop digital skills as automation increases in the processing sector. They predicted a requirement that employees be able to input data digitally rather than writing it by hand.

### Recruitment

- Much recruitment is by word of mouth
- There are a range of genuine career opportunities including self-employment
- Career opportunities are not well publicised outside the industry, some notable exceptions
- Opportunities for lucrative self-employment attract some individuals
- Potential new entrants often have inaccurate perception of earning potential and demands of the industry
- The industry tends to attract 'hands-on' people – their literacy skills may be limited
- General belief that there are opportunities for hard working individuals to succeed

Employers see a number of barriers impeding their recruitment of different types of staff. For skilled operatives, for example, lack of perceived career progression opportunities and earnings are seen as major barriers. There is a belief that there are opportunities for people to succeed in the industry, but this is not always communicated to potential new entrants.

Usage of different methods of recruitment in the area accords closely with the national findings. Employers in Yorkshire and Lincolnshire use word-of-mouth to recruit almost all types of staff, but local press and radio is used for some managerial and technical recruitment. Around a third of recruitment for technical staff uses online job boards. In terms of actual recruitment methods and preferred methods word-of-mouth is the most important. Approximately 25% of employers surveyed in Yorkshire and Lincolnshire reported hard to fill vacancies, i.e. vacancies taking over three months to fill. These were most commonly for skilled and unskilled operatives.

There are several initiatives in the Yorkshire and Lincolnshire region which aim to raise awareness of employment opportunities particularly in the processing sector. Perhaps uniquely, there is an innovative scheme promoting self-employment in mobile fish sales, to sixth formers.

### Covid-19

Employers' reactions to the pandemic followed the national pattern; after the initial shock they adapted business processes to enable them to keep businesses afloat.

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Quotes below are from employers in the region in the first week of Covid-19 lockdown.

*The large supermarket chains have closed their fish counters, so we have lost 90% of business. Furloughing staff and receiving £10k grant is just a short-term fix.*

**Aquaculture producer – Yorkshire**

*We were going through the process of expanding the business by 50% but instead Coronavirus has caused us to furlough 50 members of staff.*

**Processor – Humberside**

Quote below after the first month of lockdown

*We are starting to invest in click and collect which is totally new to our business and will require different skills and training needs*

**Fish Frier - Lincolnshire**

### South West

During the course of the fieldwork 74 employers in the South West were interviewed for the telephone survey – the sector breakdown is shown in Table 9 below. Several larger employers and stakeholders took part in depth interviews and nominal groups. A workshop with catchers and processors was held in the region before lockdown.

*Table 9 South West region telephone survey*

Sector	National	Region
Aquaculture	17%	24%
Catching	17%	23%
Fish fryer	16%	14%
Processing	27%	19%
Retail	22%	20%

### Findings

#### Employment

- Some remote areas have a limited pool of potential employees
- Many employees have a family link to the industry
- Larger processors report rapid turnover of staff
- Processors rely on migrant workers and report that many of these have no desire to progress
- Employers feel vulnerable to external event e.g. currency fluctuations which affect the availability of migrant workers
- Skilled workers on piece rates can have high incomes

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- Money is the motivator for most employees
- Potential employees have misconceptions about the industry particularly in catching and processing sectors

Some employers report that their remote location limits the pool of people from which they can recruit. There are concerns in catching and processing around the quality of the local workforce. Catchers speak of employees not turning up for work and them being unable to sail. Processors report that money is a big draw, particularly for skilled workers on piece rates. Larger processors rely heavily on migrant workers and report issues including language problems, a lack of ambition and conflict between rival racial groups.

*There is a big barrier around perception. For those who perhaps doubt those perceptions and enter the industry the reality of the job is that it is what it is – physically hard work in a not that pleasant environment.*

### Processor South West

#### Training

- Employers report food hygiene training is 'good and available'
- Much training is on the job – particularly filleting
- Loss of income is a major factor limiting the amount of training undertaken by smaller employers
- There are gaps in the provision of structured training for senior and middle managers
- Employers report that training comes second to 'getting people working'
- On-site training is preferred
- Processors look to multi skill people where possible

On the job training is used extensively in the South West. Table 10 below shows just over 80% of employers using it occasionally or often (61% often and 24% occasionally). This compared to 85% nationally.

Table 10 On the job training

Frequency	Nationally	Region
Often	61%	54%
Occasionally	24%	27%
Not at all	15%	19%

*'All our offshore fishermen are highly qualified and experienced. The skills have been passed on through the generations'*

### Catcher South West

Workforce development plans are used by 28% of employers surveyed in the region, which is similar to the national figure as shown in Table 11 below.

## Skills, Recruitment and Retention in England's Seafood Industry

Table 11 South West region workforce development plans

Workforce development plan	Nationally	Region
Yes	30%	28%
No	70%	72%

### Recruitment

- Employers traditionally rely on word of mouth
- There is less promotion of high earnings in catching, than there was in the recent past
- Catching employers feel that the quality of UK applicants is generally low
- Employers are making efforts to improve working conditions and elevate their employer brands
- Catching employers have a shortage of ticketed individuals (for vessels over 16.5m)

In common with employers nationally, the region has difficulty attracting new entrants, reasons given include coastal depopulation, a perceived tendency for talented people to move away from the coast, and the remote location of some workplaces.

A boat owner believed fishermen actively steer their families towards other careers

*'Now we see more fathers working hard to ensure sons and daughters don't follow in their footsteps'.*

**Boat owner South West**

A stakeholder suggested that the high cost of accommodation on the South coast excludes low earners. Another stakeholder in the region spoke of young people not having realistic expectations of the catching industry e.g. not being aware that they would have to be self-employed share fishermen rather than salaried.

Skippers in the region spoke of crew shortages, with some considering 'going single-handed'. There is reliance on non-EEA crew particularly Bulgarians and Latvians.

*'We are having to take on more Filipinos and Eastern Europeans because there are not enough young people from the schools wanting to work in fishing'*

**Boat owner South West**

The main form of recruitment is by word of mouth, though a large aquaculture employer spoke of moving towards advertising roles more widely to attract higher calibre entrants.

## Covid-19

The region reacted to the pandemic in similar ways to other areas of the country. With smaller operators in fishing and processing, serving local markets least affected and those serving hospitality, schools and export markets most affected.

*'Because I have a boat and sell fish to the public, I see a demand for fresh fish'*

**Catcher-retailer South West**

*'Our fleet of vans is usually out on the roads daily delivering to local restaurants and hotels which are now closed due to Coronavirus'*

**Wholesaler/retailer South West**

## South East and London

The telephone survey covered 55 employers in the region with a breakdown shown in Table 10 below. Stakeholders and employers in the region took part in depth interviews and nominal groups.

Table 12 Telephone survey in South East and London

	National	Region
Aquaculture	17%	11%
Catching	17%	20%
Fish fryer	16%	7%
Processing	27%	22%
Retail	22%	40%

## Findings

### Employment

- High cost of living in parts of the region limits employment in lower skilled roles
- Employers face strong competition from other sectors when recruiting
- Aquaculture employers suggest the sector's image deters potential employees
- A diverse workforce in terms of nationalities

Employers report that the high cost of living in areas of the South East and London is a barrier to finding staff for lower paid roles. Industry image was highlighted as a problem in attracting young people. One employer suggested the industry is perceived as less than dynamic, and that younger employees might be looking for a more technical/digital career.



## Training

- Training is driven by mandatory requirements; employers are looking for funding for non-mandatory training
- Catchers report lack of training for engineers
- Catchers are looking for training to enable to progress deckhands to skippers
- In house training is valued
- Some demand for upskilling managers
- mandatory training is accessible; some employers looking for consultants to deliver training on-site

In common with other sectors, training is driven by mandatory requirements; with a reluctance to undertake non-mandatory training especially if there is no funding. Catchers are interested in progressing deckhands from the deck to the wheelhouse via skipper training. One catcher reported having to employ Lithuanian engineers due to a perceived lack of local training provision.

One processor said there is a lack of training for fish filleters. Some catchers are looking at adding value to their catch and retailing on farmer's markets in London; they may have a future requirement for processing training.

*We struggle to get British engineers and take mainly Lithuanians. This is mainly due to the lack of qualification opportunities available in the UK.*

### Catcher South East

Table 13 shows on the job training is used often by 75% of employers in the region, this is the highest percentage of any Seafish region.

*Table 13 On the job training South East and London*

	National	Region
Often	61%	75%
Occasionally	24%	8%
Not at all	15%	17%

Workforce development plans are used by 27% of employers which is lightly above the national figure of 30%.

*Table 14 Workforce development plans South East*

Workforce development plan	Nationally	Region
Yes	30%	27%
No	70%	73%

## Skills, Recruitment and Retention in England's Seafood Industry

External training is used by often by 20% of employers in the region, this compares to 15% nationally. Though the proportion of employers who never use external training - 80% is close to the national finding.

Table 15 External training

	National	Region
Often	15%	20%
Occasionally	7%	0%
Not at all	78%	80%

*Training is done in-house by people who have been in the business a very long time. There is no training course to beat experience.*

**Catcher South East**

### Recruitment

- Attitude and willingness to learn valued by employers
- Employers close to centres of population looking for drivers to expand home deliveries
- Catchers report difficulties recruiting deckhands, and skippers who can manage staff

In common with other regions, employers in the South East have difficulty attracting new entrants. With some employers suggesting grassroots campaigns. Fishmongers and processors in the region spoke of trying to recruit trained and qualified people, rather than training them in house or using external providers; an aquaculture producer suggested that practical skills with some experience are their priorities when seeking new staff.

Several employers are looking for drivers as they expand their home deliveries generally as a reaction to Covid-19. Nationally, fish friers suggest that low margins are a barrier to home deliveries; but in the South East and London, the proximity to densely populated relatively wealthy areas may make home deliveries a more economic proposition which could be sustainable after Covid-19 lockdown.

*We generally take on people who can demonstrate practical knowledge and have a little work experience then train in-house.*

**Aquaculture producer South East**

*'We do have more boats and fishing gear than deckhands. Deckhands are very difficult to recruit. Schools should do more in promoting the fisheries industry as a career.'*

**Boat owner South East**

## Skills, Recruitment and Retention in England's Seafood Industry

Following the national pattern, the main method of recruitment in the region is word of mouth. Most businesses in the region are close to densely populated areas, giving them a large pool of potential new entrants, but also lots of competition from other industries.

### **Covid-19**

In common with the industry in other regions, employers in the South East and London, have adapted their businesses to survive the pandemic. With some suggesting that increases in online sales and other channels such as home delivery may continue after the pandemic.

*'Our restaurant side of the business has closed so we have had to furlough six members of staff. However, the mail order side of the business has increased so we may need to take on more people to manage the volume of orders.'*

**Fish Frier**

*'We are a family business. We are now having to carry out more home deliveries. Currently setting up click and collect business. Just ordered the card machines.'*

**Fishmonger**

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