



Results from the 2018 Seasonal Labour in Horticulture End of Year Survey for England

This release contains the results from the 2018 Seasonal Labour in Horticulture End of Year Survey, which focused on practices relating to seasonal labour on farms with horticulture in England.

Key findings and definitions:

The results shown in this release have been weighted and apply to the population of all farms with horticulture in England.

Farms with horticulture are defined for this statistical release as those with fruit and vegetables grown outdoors for human consumption, Hardy Nursery Stock (HNS), bulbs and flowers in the open, or glasshouse and protected crops above a specified threshold (more detail on methodology can be found on page 11).

Seasonal labour is employment which fluctuates or is restricted according to the season or time of the year

Key results for farms with horticulture in 2018:



35% of farms used seasonal labour, ranging from **18%** of small farms to **55%** of large farms.



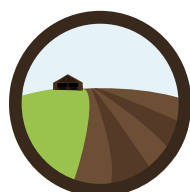
33% of those farms that used seasonal labour reported a shortfall.



For **37%** of farms with seasonal labour, at least three quarters of workers had worked for the farm in previous years.



54% of farms that experienced a seasonal labour shortfall had made changes in how their business runs in order to cope with the shortfall.



73% of farms using seasonal labour reported that the productivity of their workers remained the same over the past 3 years.



67% of farms experienced no shortfall of labour. Of these, **17%** had made changes to how their business ran to prevent the shortfall.

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Background

The Seasonal Labour in Horticulture End of Year Survey was a voluntary, online survey that asked farms with horticulture about their use of seasonal labour in 2018. The survey took place in February 2019. Seasonal workers are defined in the survey as 'those employed full-time or part-time on a casual / as required basis'. More detail on methodology can be found on page 11.

Detailed Results

Requirement for seasonal labour

The results of this survey show that just over a third (35%) of farms with horticulture used seasonal labour in 2018. This proportion varied by the size of the farm (see Figure 1), with 18% of small farms using seasonal labour in 2018 compared to 23% of medium farms and 55% of large farms. There was also some variation between farm types (see Figure 2), with 48% of Specialist Hardy Nursery Stock (HNS) farms and 40% of Specialist Fruit farms using seasonal labour compared to 23% of cereal/mixed/livestock farms.

Figure 1. Proportion of farms with horticulture that used seasonal labour in 2018, by farm size.

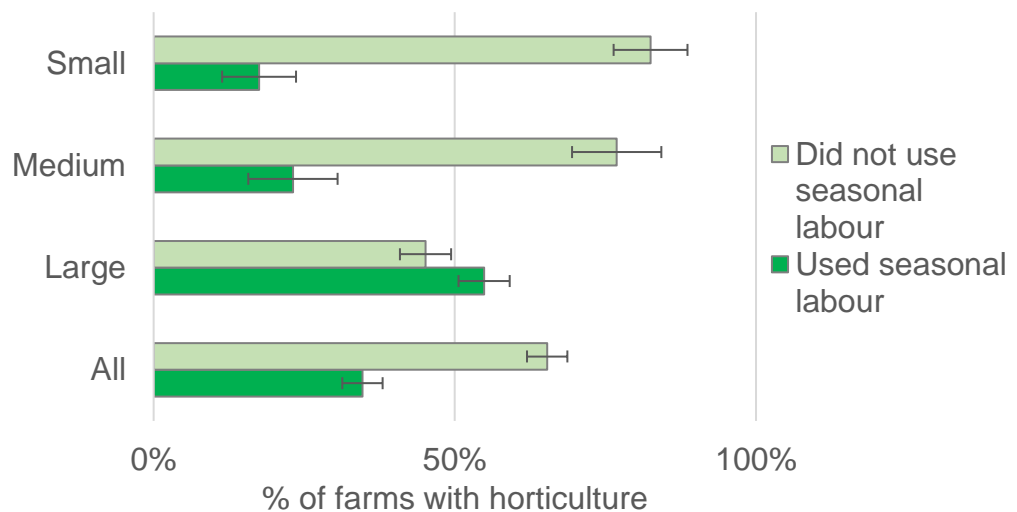
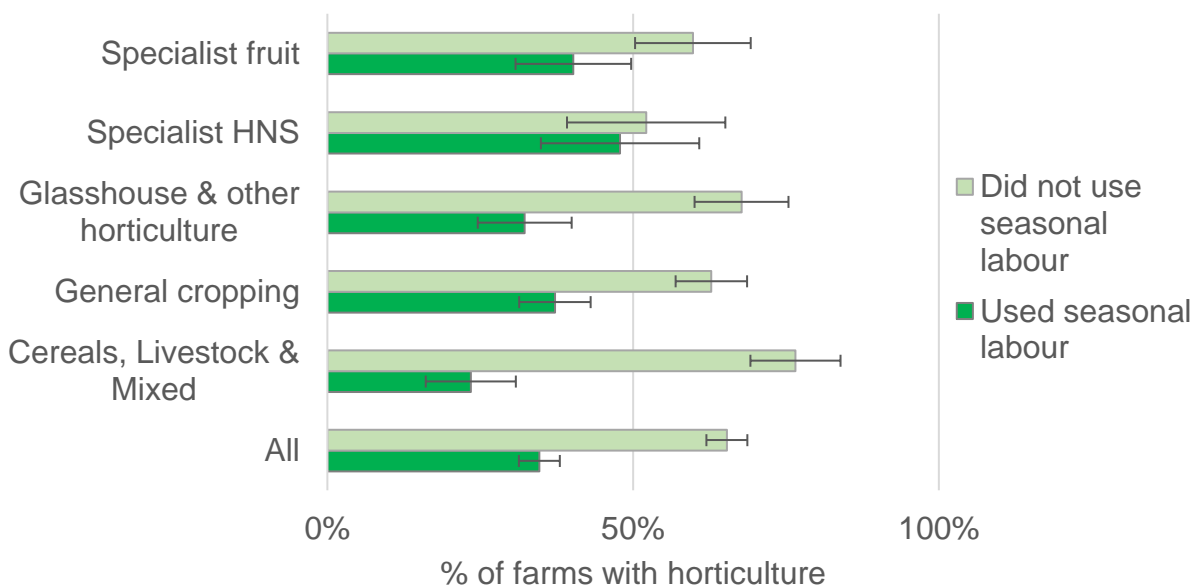


Figure 2. Proportion of farms with horticulture that used seasonal labour in 2018, by farm type.



Use of Labour

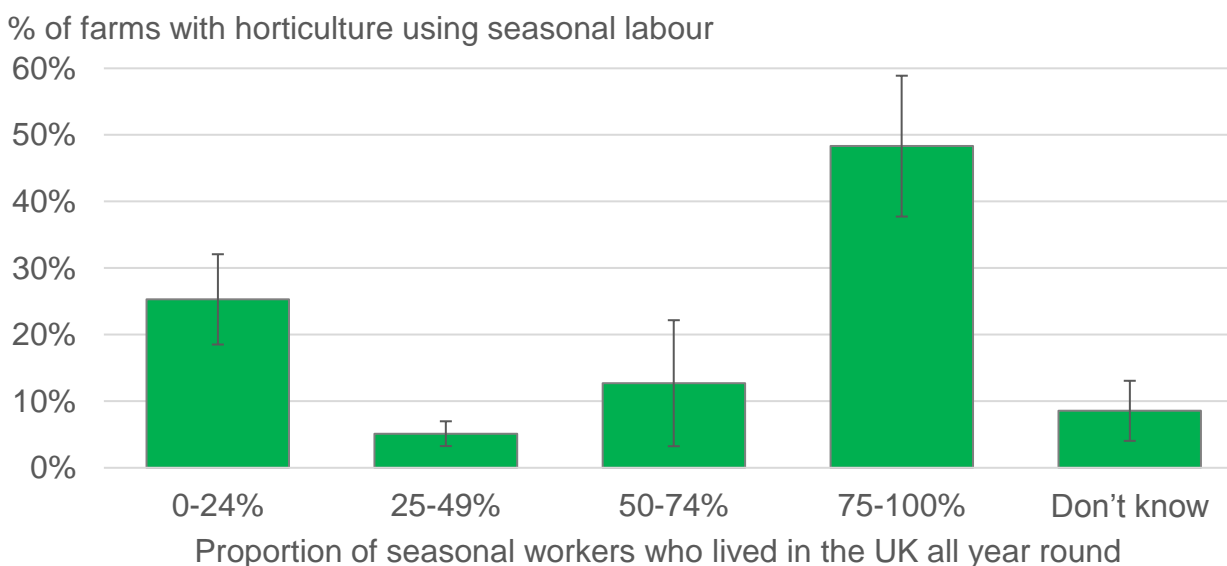
Farms with horticulture that used seasonal labour were asked for the proportion of their seasonal workers who had returned from previous years. For around a third (31%) of these farms less than a quarter of their seasonal workers in 2018 were returnees from previous years (see Figure 3). For smaller¹ farms this proportion was 34%, compared to 27% for large farms. For 37% of farms, at least three quarters of their workers had worked for the farm in previous years.

Figure 3. Proportion of farms with seasonal workers who had returned from previous years



Just under half (48%) of farms with horticulture that used seasonal labour in 2018 reported that at least three quarters of their seasonal workers lived in the UK all year round. 25% of farms reported that less than a quarter of their seasonal workers in 2018 lived in the UK all year round. 9% of farms said they did not know (see Figure 4).

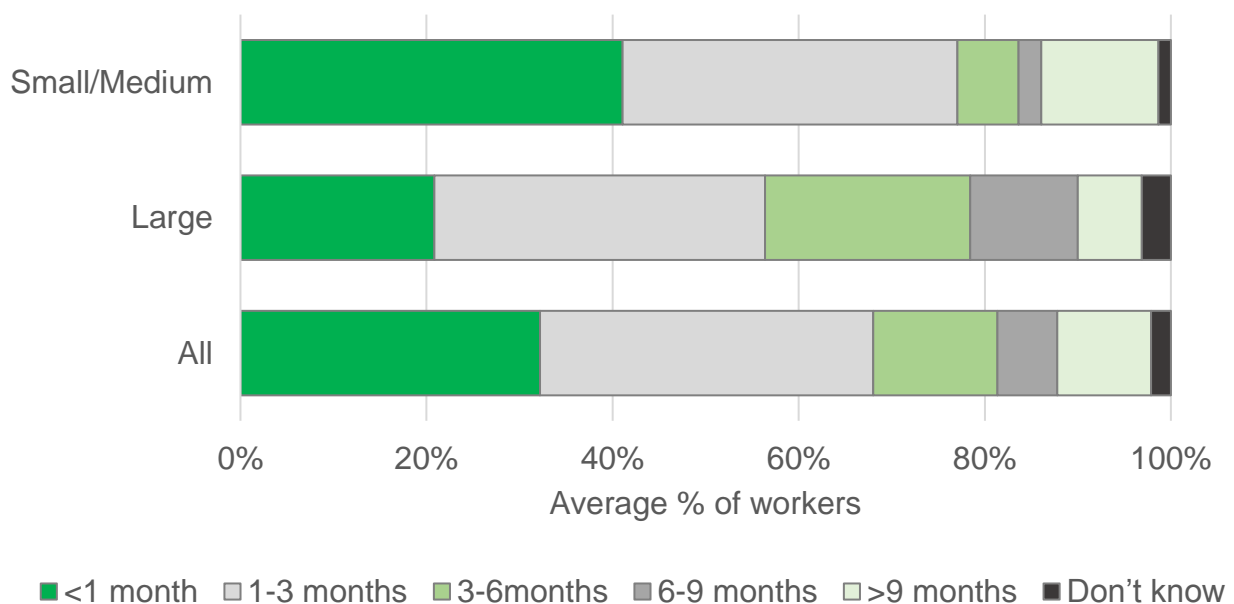
Figure 4. Proportion of seasonal workers who lived in the UK all year round



¹ Small and Medium farms combined in one group.

Farms with horticulture that used seasonal labour were asked for the proportion of their seasonal workers that worked on their farm for a specified length of time. Five options were provided: less than 1 month, 1-3 months, 3-6 months, 6-9 months, greater than 9 months and “don’t know”. Across all farms with horticulture that used seasonal labour, on average 32% of workers stayed on the farm for less than 1 month, whereas 10% stayed on the farm for more than 9 months. Smaller² farms had a greater proportion of seasonal workers who stayed on the farm for less than 3 months (77%), compared to 56% for large farms (see Figure 5). Specialist fruit farms had the greatest proportion of seasonal workers that worked for less than 3 months (87%). Non-specialist farms with horticulture crops (i.e. cereals, livestock, mixed and general cropping) tended to have a greater proportion of seasonal workers that worked on their farms for more than 9 months (16% and 17% respectively; see Figure 6). There were also differences between regions (see Figure 7), possibly linked to the types of farm found in each region. On average, farms in the West Midlands had a greater proportion of seasonal workers that worked on their farm for less than 3 months than other regions (86%).

Figure 5. Length of stay of seasonal workers by farm size



² Small and Medium farms combined in one group.

Figure 6. Length of stay of seasonal workers by farm type

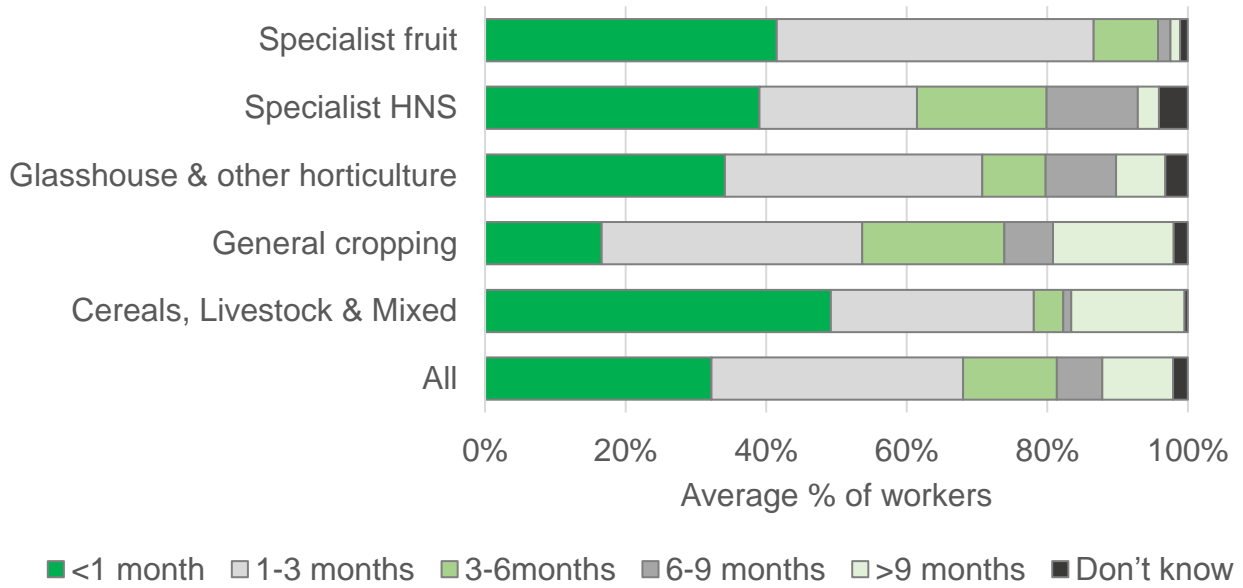
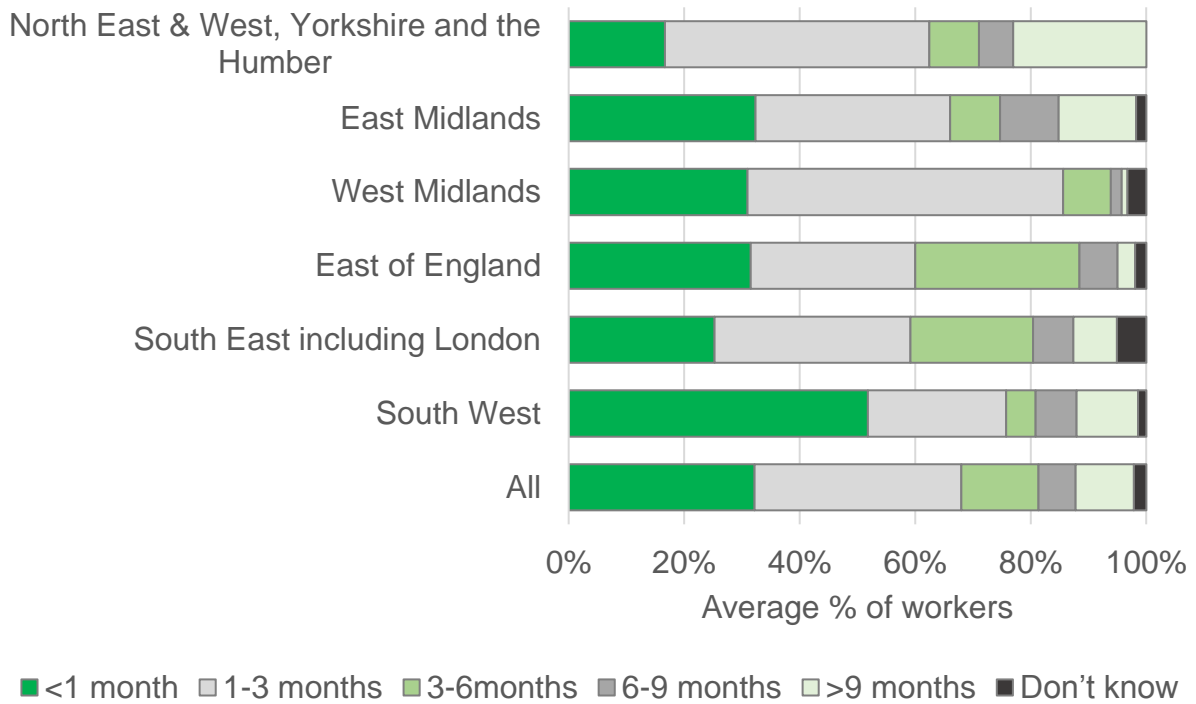


Figure 7. Length of stay of seasonal workers by region

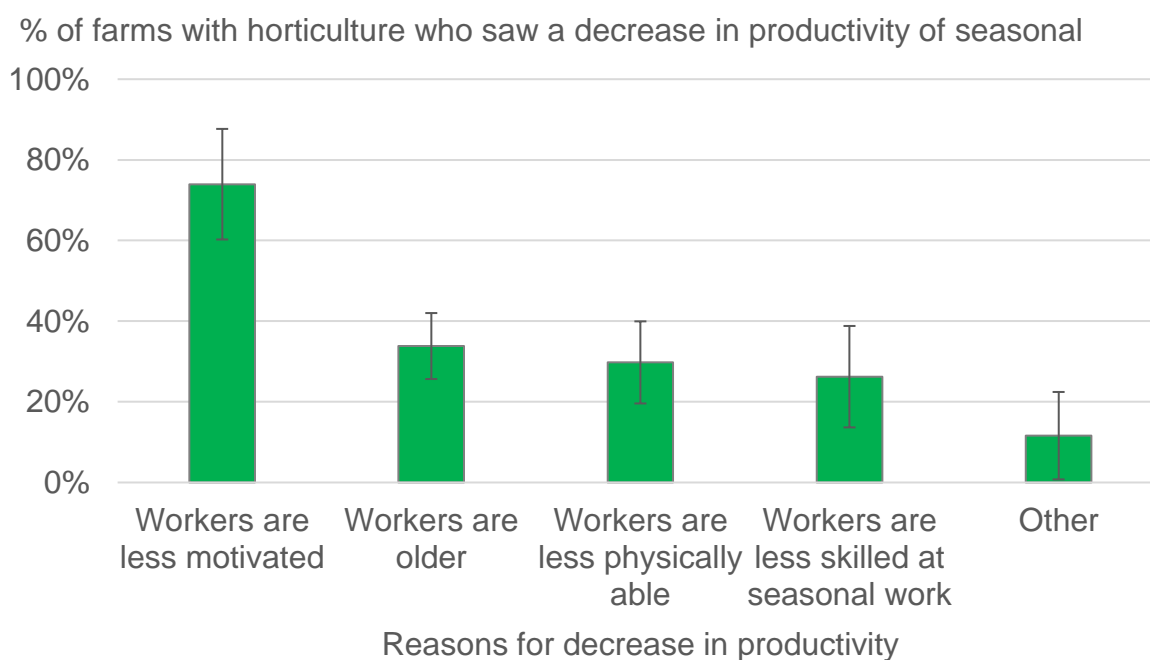


Farms with horticulture that used seasonal labour in 2018 were asked whether the productivity of their seasonal workers had changed over the last 3 years. The majority (73%) of farms responded that productivity had remained the same, 19% said it had got worse and 9% said it had improved.

Those suggesting an improvement in productivity were asked why they thought this had occurred. The most common reasons³ given were that workers were now more skilled at seasonal work (72%) and workers were more motivated (44%).

For those suggesting that productivity had decreased, the most common reason given was that workers were less motivated (74%) followed by workers were older (34%), workers were less physically able (30%) and workers were less skilled at seasonal work (26%) (see Figure 8).

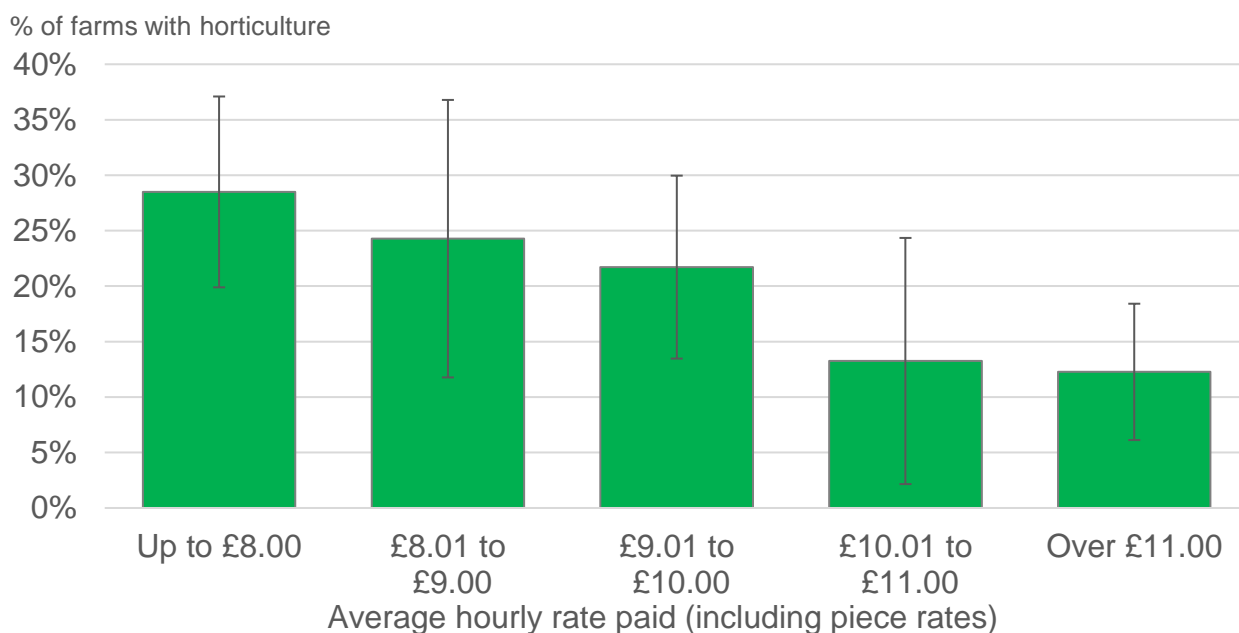
Figure 8. Reasons for decrease in productivity over the last three years



The average hourly rate paid by farms for seasonal workers in 2018 was £9.15, including any piece rates. For over a quarter (28%) of farms with horticulture that used seasonal labour in 2018 the average wage rate paid to their seasonal workers was less than £8.00 per hour (see Figure 9), compared to 12% of farms that paid, on average, over £11.00 per hour. Specialist Hardy Nursery Stock farms paid the highest with an average hourly rate of £10.26. 19% of farms offered piece rates and/or bonus schemes (13% offered piece rates and 4% offered bonus schemes, note that 2% offered both).

³ Note that there were less than 30 responses to this question. It has therefore not been possible to give a full breakdown of the reasons given due to low numbers.

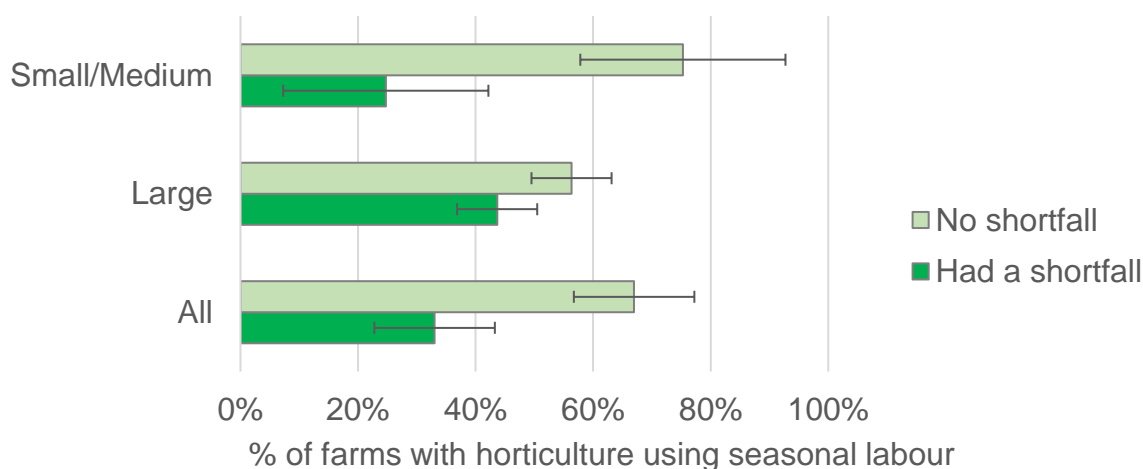
Figure 9. Proportion of farms with horticulture that used seasonal labour in 2018 by pay band



Shortfall

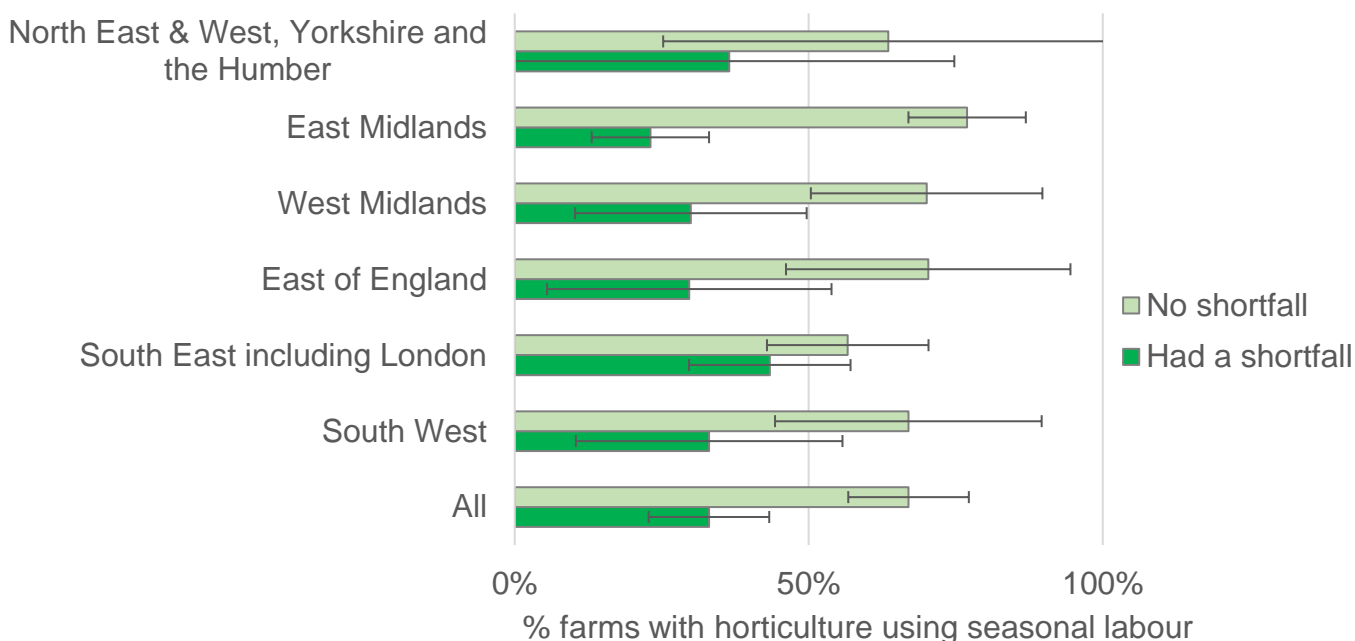
One third (33%) of farms that used seasonal labour in 2018, said that they experienced a shortfall of seasonal workers. This varied between farm size groups with 25% of smaller⁴ farms having a shortfall compared to 44% of large farms (see Figure 10). This also varied by region (see Figure 11) with the largest proportion experiencing a shortfall in the South East (43%).

Figure 10. Proportion of farms needing seasonal labour who experienced a shortfall, by size of farm



⁴ Small and Medium farms combined in one group.

Figure 11. Proportion of farms needing seasonal labour who experienced a shortfall, by region



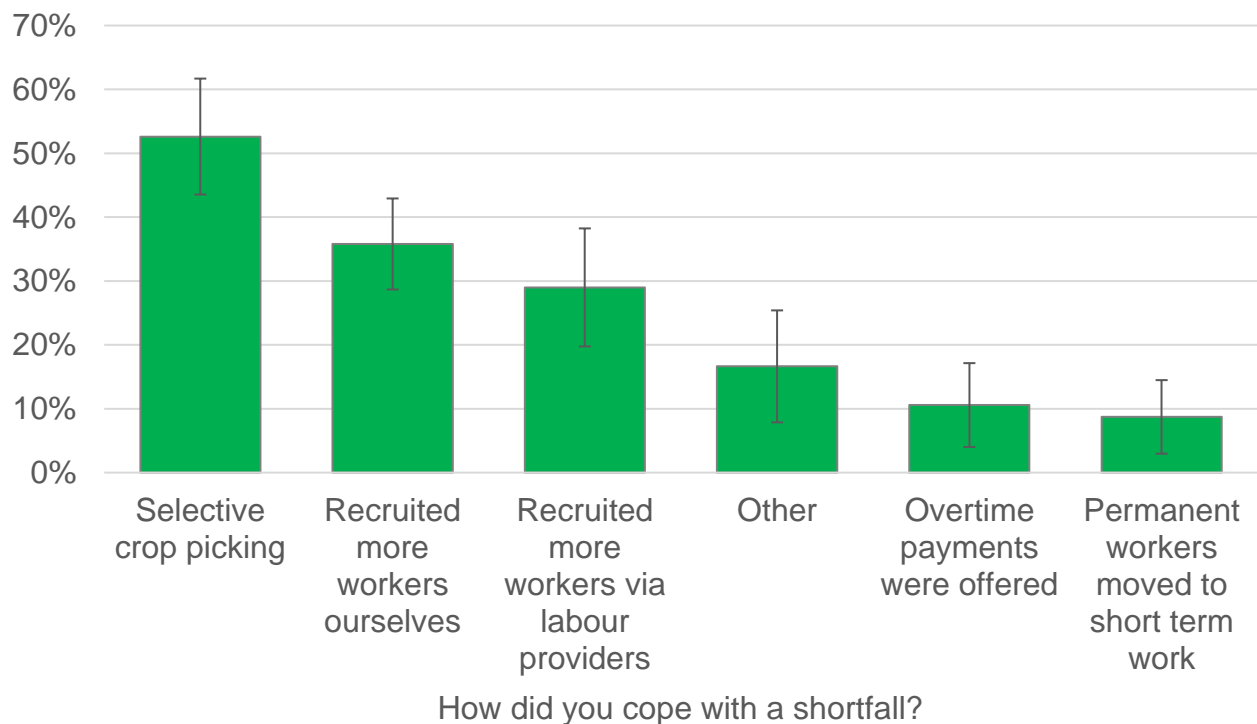
Of those farms that used seasonal labour and did not experience a shortfall, 17% said that they had made changes to the way they ran their business in order to prevent a shortfall. For those that made changes, the most common changes from the options provided⁵ were “invested in worker accommodation/facilities” (26% of this group) followed by “decreased planting/production” (13%) and “reduced labour needs through technology” (12%). A large proportion (81%) of this group selected “Other” with the majority mentioning increasing staffing levels or approaching multiple labour agencies.

Of those farms that used seasonal labour in 2018 and did experience a shortfall, 54% said that they made changes to the way they ran their business in order to cope with this shortfall. For those that made changes, the most common change made was selective crop picking (53%), followed by recruiting more workers themselves (36%), recruiting more workers via labour providers (29%), other (17%), offering overtime payments (11%), and moving permanent workers temporarily onto short term work (9%) (see Figure 12).

⁵ The options “advertised increases in wages or offered bonuses” and “changed planting production” have been included in “Other” for the purposes of analysis due to there being too few responses to show the results separately for these options.

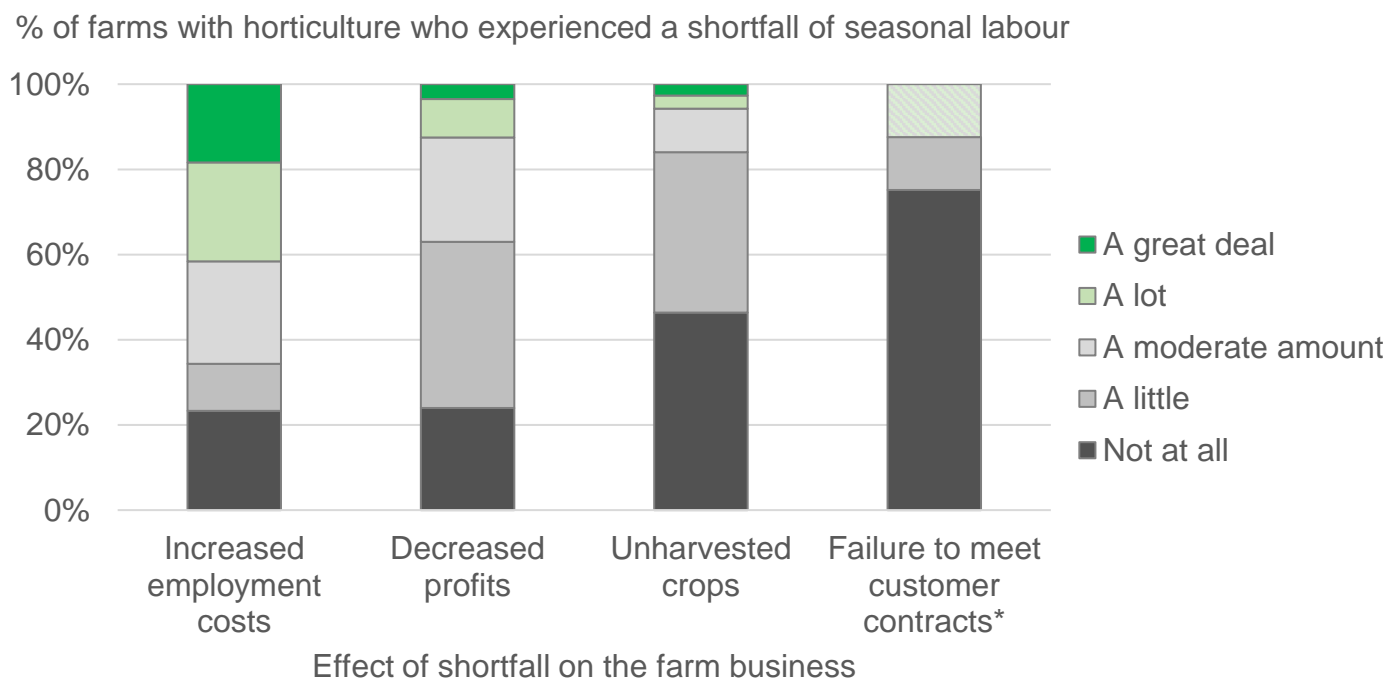
Figure 12. Proportion of farms needing seasonal labour who took action to cope with a shortfall

% of farms with horticulture who took action to cope with a shortfall of seasonal labour



The same group of farms (that used seasonal labour in 2018 and experienced a shortfall), were asked how this shortfall affected their business as a whole. Increased employment costs were the largest effect on farm businesses, with 42% of farms saying this affected the business by “a great deal” or “a lot”. For 12% of farms the impact of the shortfall on decreased profits was said to be “a great deal” or “a lot”. For around half of farms (54%) with a shortfall, this was said to have had some impact on the level of unharvested crops. For 6% of farms with a shortfall the effect was said to be “a great deal” or “a lot” (see Figure 13).

Figure 13. Effect of shortfall on farm businesses for those respondents who needed seasonal labour and experienced a shortfall



**The categories "A moderate amount" and "A lot" have been combined.*

Contacting workers

Farmers were asked what, in their view, would be the most effective method for contacting seasonal workers about EU exit. The most common method suggested was through employment agencies (50%) followed by the farmer themselves (32%), email (28%), social media (25%), industry bodies (12%) and newsletters (5%).

Survey methodology

Definitions

Farms with horticulture are defined for this statistical release as those with one or more of the following crop areas; fruit (>1 hectare) and vegetables (>0.5 hectares) grown outdoors for human consumption, Hardy Nursery Stock (HNS), bulbs and flowers in the open (>1 hectare), or glasshouse and protected crops (>0.1 hectare).

Farm type is defined initially as the robust farm type, a standardised farm classification. Although farms need to have horticultural activity to be included in the survey population, they may have different robust farm types (for example, a farm where the majority of output comes from cereal production but has some horticultural activity would be classified as the robust farm type of “Cereals” but will be in the survey population). For those farms who are classified as the robust farm type of “Horticulture”, we have then broken this down into the main farm types “Specialist fruit”, “Specialist Hardy Nursery Stock (HNS)” and “Glasshouse and other horticulture”.

Seasonal labour is employment which fluctuates or is restricted according to the season or time of the year

Farm sizes are based on the estimated labour requirements for the holding, rather than its land area. The farm size bands used within the detailed results tables which accompany this publication are shown in the table below. Standard Labour Requirement (SLR) is defined as the theoretical number of workers required each year to run a holding, based on its cropping and livestock activities.

Farm size	Definition
Small	Less than 2 SLR
Medium	2 to less than 3 SLR
Large	3 or more SLR

Survey Design

The results provided in this release are based on questions sent to approximately 3,100 holdings with horticulture in England. These holdings were targeted by farm size and region to ensure a representative sample. The survey was online only and voluntary. The response rate was 22%. Holdings were only selected if there was an email address on the Farm Survey register. Thank you to all of the farmers who completed a survey form.

A breakdown of the number of holdings within the population, sample and those that responded are shown below.

Farm size	Number of eligible holdings in England	Number of holdings sampled	Number of responses	Response rate %
Small	2,959	799	140	18
Medium	996	401	89	22
Large	3,083	1,907	432	23
All farms	7,038	3,104	661	21

Data analysis

The data for the Seasonal Labour in Horticulture Survey are subject to rigorous validation checks which identify inconsistencies within the data.

Results have been analysed using a standard methodology for stratified random surveys to produce national estimates. With this method, all of the data are weighted according to the inverse sampling fraction. This was an online only survey and we have therefore assumed that farms with an email address are representative of the population in producing the results.

Accuracy and reliability of the results

We show 95% confidence intervals against the results. These show the range of values that may apply to the figures. They mean that we are 95% confident that this range contains the true value. They are calculated as the standard errors (se) multiplied by 1.96 to give the 95% confidence interval (95% CI). The standard errors only give an indication of the sampling error. They do not reflect any other sources of survey errors, such as non-response bias.

Other survey results and publications

This release contains headline results for each section. The full breakdown of results, by region, farm type, and farm size, are available at:

<https://www.gov.uk/government/collections/structure-of-the-agricultural-industry>

The Seasonal Labour in Horticulture Survey will continue to run and results will be published quarterly. Latest results from this survey can be found here:

<https://www.gov.uk/government/statistics/results-from-the-labour-in-horticulture-survey-2019-for-england>

Additional information

Finally, we are keen to hear your thoughts on this statistical release. If you found the data useful or if you have any other comments please let us know. You can contact us via the phone number on the front page or alternatively email us at farming-statistics@defra.gov.uk.

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