



Results from the Seasonal Labour in Horticulture Survey 2018 for England

This release shows the results from the Seasonal Labour in Horticulture Survey that ran each quarter in 2018. The results presented in this publication are classified as experimental statistics. Experimental Statistics are those that are within their development phase and are published in order to involve potential users at an early stage in building a high quality set of statistics that meet user needs. The Experimental Statistics label highlights to users that Defra is still working on further developing the methodologies used in producing these statistics. Full detail of the survey is provided in the methodological notes on page 5.

Key findings and definitions:

The results shown in this release are averages for those that responded to the survey. The results have not been weighted to account for the background population. Whilst there does not appear to have been any bias in response, some care should be taken when interpreting the results.

Horticulture farms 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.



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



25% (Quarter 4) to 36% (Quarter 1) of survey respondents needed seasonal labour throughout the quarters of 2018



Shortfall in seasonal labour is the difference between seasonal labour need and actual use



Average shortfall ranged from 4% (Oct, Nov) to 12% (Jan, Mar) throughout 2018 for survey respondents who needed labour and had a shortfall



Person days is a method of measuring labour, where 1 person day = 8 hours of work



Average shortfall ranged from 7 (Nov) to 51 (Jul) person days throughout 2018 for survey respondents who needed labour and had a shortfall

Background

The Seasonal Labour in Horticulture Survey is a voluntary, quarterly online survey that asks farmers how many person days¹ their farm business needed from temporary workers, and how many they actually used, in each month. Temporary workers are defined in the survey as 'those employed full-time or part-time on a casual / as required basis'. Please note that throughout this statistics release, the terms 'temporary labour', 'seasonal labour' and 'labour' are used interchangeably. The survey began in early 2018 to assess any potential shortfall in seasonal labour on horticulture farms. More detail on methodology can be found on page 5.

Detailed Results

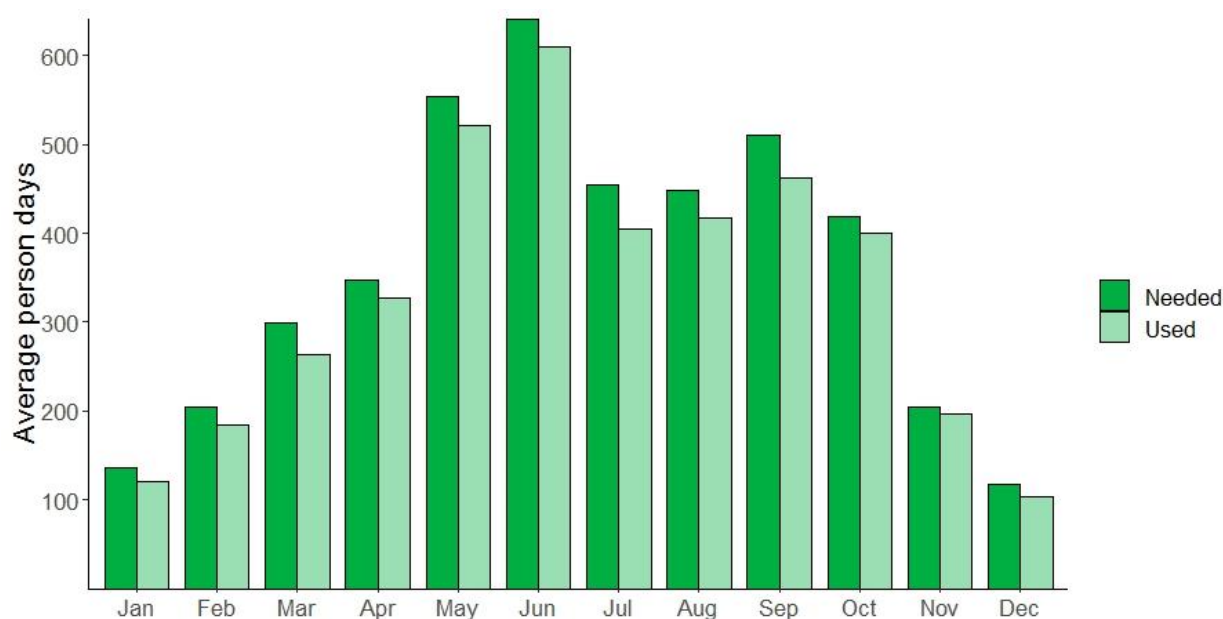
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2018

The percentage of survey respondents who reported needing seasonal labour on their holding varied between quarters, ranging from 25% (Quarter 4) to 36% (Quarter 1).

For those respondents who needed seasonal labour, the average need varied throughout the year, with the highest need in terms of person days being the summer months, peaking at an average of 641 person days per farm in June. Across the quarters in 2018, the percentage of survey respondents reporting a shortfall in labour also varied, ranging from 26% (Quarter 4) to 34% (Quarters 2 and 3), of those who needed labour. Across the months in 2018, the shortfall ranged from an average of 7 person days (November) to 51 person days (July), equating to a range of 4% (October and November) to 12% (January and March) shortfall. Please see Figure 1 below and Table 1 on page 4 for more detail.

Figure 1: Average person days needed and used per holding from January to December 2018 for survey respondents with a need for seasonal labour.

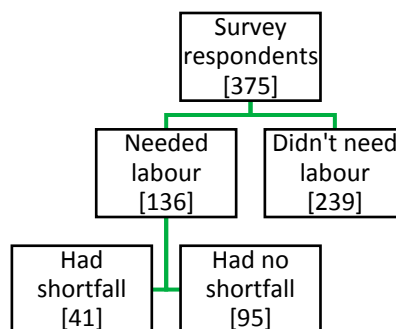


¹ Please see page 5 for more details on person days.

Quarter 1 (January to March)

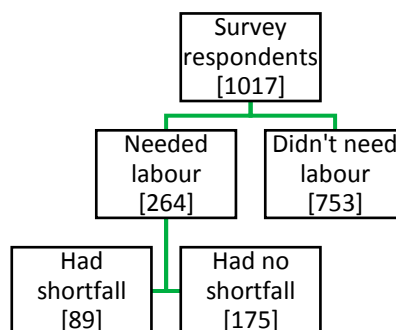
The response rate of the first quarterly survey was 16%, which was lower than expected. Results for the first quarter should be treated with caution as a result of this.

In Quarter 1 of 2018, out of the 375 who responded, 239 had no need for seasonal labour. Of the 136 survey respondents who did need labour, 30% reported a shortfall. The average shortfall for the entire quarter per holding was 73 person days, which equated to an 11% shortfall. The average need for labour increased throughout the quarter from 136 person days in January to 299 person days in March. The average shortfall followed the same pattern, increasing from 16 person days in January to 36 person days in March.



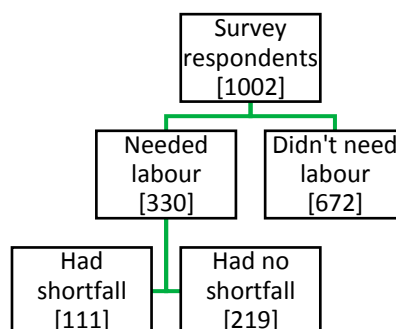
Quarter 2 (April to June)

In Quarter 2 of 2018, out of the 1017 who responded, 753 had no need for seasonal labour. Of the 264 of survey respondents who did need labour, 34% reported a shortfall. The average shortfall for the entire quarter per holding was 84 person days, which equated to a 5% shortfall. As in quarter 1, the average need for labour increased throughout the quarter from 347 person days in April to 641 person days in June. The average shortfall followed a similar pattern, increasing from 20 person days in April to 32 person days in May and June.



Quarter 3 (July to September)

In Quarter 3 of 2018, out of the 1002 who responded, 672 had no need for seasonal labour. Of the 330 of survey respondents who did need labour, 34% reported a shortfall. The average shortfall for the entire quarter per holding was 129 person days which equated to a 9% shortfall. The average need for labour was similar in July and August (455 and 448 person days respectively), and increased slightly to 510 person days in September. Average shortfall in Quarter 3 was higher than other quarters in each month, ranging from 31 (August) to 51 (July) person days.



Quarter 4 (October to December)

In Quarter 4 of 2018, out of the 985 who responded, 742 had no need for seasonal labour. Of the 243 of survey respondents who did need labour, 26% reported a shortfall. The average shortfall for the entire quarter per holding was 40 person days, which equated to a 5% shortfall. The average need for labour decreased throughout the quarter from 419 person days in October to 118 person days in December. Average shortfall in terms of person days was lower than other quarters in each month, ranging from 7 (November) to 19 (October) person days.

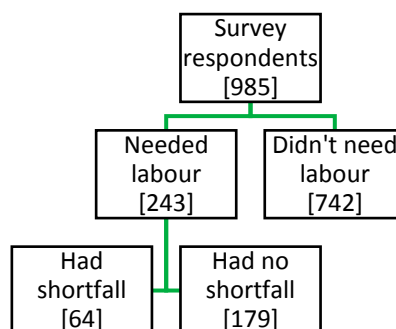


Table 1: Average quarterly and monthly need, use and shortfall per holding in 2018 for survey respondents with a need for seasonal labour.

average per horticulture farm

	Person days needed	Person days used	Shortfall		
			Person days	%	People per day ^b
Quarter 1^a (n = 136)	639	566	73	11	0.8
January ^a	136	120	16	12	0.5
February ^a	205	184	21	10	0.7
March ^a	299	263	36	12	1.2
Quarter 2 (n = 264)	1 541	1 457	84	5	0.9
April	347	327	20	6	0.7
May	553	521	32	6	1.1
June	641	609	32	5	1.1
Quarter 3 (n = 330)	1 413	1 284	129	9	1.4
July	455	405	51	11	1.7
August	448	417	31	7	1.0
September	510	462	48	9	1.6
Quarter 4 (n = 243)	741	702	40	5	0.4
October	419	400	19	4	0.6
November	205	197	7	4	0.2
December	118	104	14	11	0.5

a) The response rate for Quarter 1 was 16% which was lower than expected, therefore results for the first quarter should be treated with caution.

b) Based on a 30 day month and 90 day quarter.

n: the number of survey respondents who needed seasonal labour within the quarter

Why use person days?

Person days were collected instead of people as it provides a more consistent measure over time. For example, a team of 10 workers pick a crop on farm A, then when they have finished they do the same on farm B, followed by farm C. If asked how many people they needed, each farm would say 10 people, totalling 30 people, whereas it was actually the same 10 people that worked on them all. Person days is also consistent with our approach for collecting labour statistics for seasonal workers on the Farm Structure Survey.

Survey methodology

The population was approximately 7,000 horticulture holdings, defined as holdings who grew more than 0.1 ha of vegetables in the open, fruit, Hardy Nursery Stock (HNS), or more than 100m² of protected crops as recorded in the 2017 and 2018 June Survey of Agriculture and Horticulture (quarters 1-2 and quarters 3-4 respectively).

The sample size was originally 2,356 holdings but the response rate was low so this was increased to 3,117 by quarter 4. To ensure a representative sample holdings were stratified by Standard Labour Requirement (SLR) band. In the SLR system, each livestock type and land-use has a theoretical amount of labour required each year. This value is multiplied by the land area or livestock numbers and then summed to give the SLR for the holding. The SLR represents the typical number of full time workers required on the holding.

Holdings were selected only if we held an email address as the survey was online only. The only exception is quarter 2, where those for whom we didn't have an email address were added to the sample and were sent a card inviting them to complete the survey online; this didn't assist in our response rate and so was not repeated in quarters 3 or 4.

	Number of holdings		
	Sample	Responses	Response rate
Quarter 1	2,356	375	16%
Quarter 2	4,439	1,017	23%
Quarter 3	3,155	1,002	32%
Quarter 4	3,117	985	32%

Data analysis

The data for the Seasonal Labour in Horticulture Survey are subject to rigorous validation checks which identify inconsistencies within the data. Any survey responses which accounted for multiple holdings (i.e. at a business level) were proportionally split across each holding using their respective SLR value and individual holdings which did not meet our definition of horticulture farms were then excluded from analysis.

Other survey results and publications

The Seasonal Labour in Horticulture Survey will continue to run and results will be published quarterly.