



## Results from the Seasonal Labour in Horticulture Survey for England – Quarter 1, 2019

This release shows the results from the Seasonal Labour in Horticulture Survey that collected data regarding the first quarter of 2019. 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 pages 4.

### 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



**30% of survey respondents needed seasonal labour** in quarter 1 of 2019



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



**Average shortfall was 4.3%** in quarter 1 of 2019 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 5 (Jan) to 10 (Mar) person days** in quarter 1 of 2019 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 days their farm business needed from temporary workers, and how many they actually used, in each month<sup>1</sup>. 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 4.

## Detailed Results

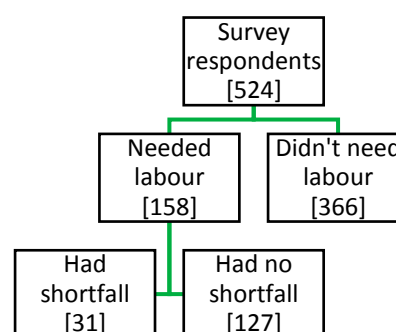
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### 2019

#### Quarter 1 (January to March)

The response rate of the first quarterly survey was 18%, which was lower than expected. Results for the first quarter should be treated with caution as a result of this.

In Quarter 1 of 2019, out of the 524 who responded, 366 had no need for seasonal labour. Of the 158 survey respondents who did need labour, 19.6% reported a shortfall. The average shortfall for the entire quarter per holding was 21 person days, which equated to a 4.3% shortfall. The average need for labour increased throughout the quarter from 107 person days in January to 220 person days in March. The average shortfall followed the same pattern, increasing from 5 person days in January to 10 person days in March.



**Table 1: Average quarterly and monthly need, use and shortfall per holding in 2019 for survey respondents with a need for seasonal labour.**

	Person days needed	Person days used	average per horticulture farm		
			Shortfall		
			Person days	%	People per day <sup>a</sup>
<b>Quarter 1 (n = 158)</b>	<b>479</b>	<b>458</b>	<b>21</b>	<b>4</b>	<b>0.2</b>
January	107	101	5	5	0.2
February	152	147	6	4	0.2
March	220	210	10	4	0.3

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

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

<sup>1</sup> Please see page 4 for more details on person days.

**Figure 1: Average person days needed and used per holding from January 2018 to March 2019 for survey respondents with a need for seasonal labour.**

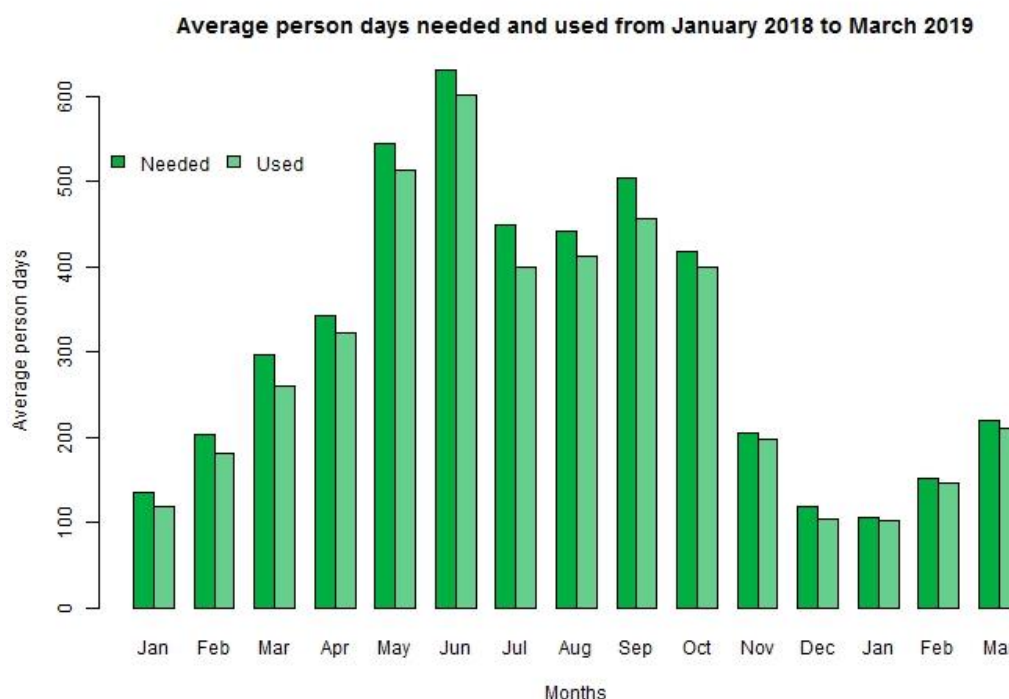


Figure 1 above shows that the average need for labour increased throughout quarter 1 in 2019, as it did in quarter 1 of 2018. However, the average person days needed and used by respondents in quarter 1 of 2019 was lower than in the same quarter of 2018. Table 2 below shows the quarter 1 figures for 2018 and 2019 for comparison. The full monthly and quarterly results for 2018 can be found in the accompanying dataset. Please note that the responses rates for quarter 1 in both 2018 and 2019 were lower than expected. Therefore, these results should be treated with caution.

**Table 2: Average quarter 1 need, use and shortfall per holding for survey respondents with a need for seasonal labour: 2018 and 2019**

<i>average per horticulture farm</i>					
	Person days needed	Person days used	Shortfall		
			Person days	%	People per day <sup>a</sup>
<b>2018 - Quarter 1<sup>(b)</sup></b> (n = 136)	<b>639</b>	<b>566</b>	<b>73</b>	<b>11</b>	<b>0.8</b>
<b>2019 - Quarter 1<sup>(b)</sup></b> (n = 158)	<b>479</b>	<b>458</b>	<b>21</b>	<b>4</b>	<b>0.2</b>

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

b) The response rate for 2018 Quarter 1 was 16% and 2019 Quarter 1 was 18%. These were lower than expected, therefore results for these quarters should be treated with caution.

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 6,700 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 100m<sup>2</sup> of protected crops as recorded in the 2017 and 2018 June Survey of Agriculture and Horticulture.

The sample size was 2,865 for quarter 1 in 2019. 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.

	Number of holdings		Response rate
	Sample	Responses	
<b>Q1 2018</b>	2,356	375	16%
<b>Q1 2019</b>	2,865	524	18%

## 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

Results from the Seasonal Labour in Horticulture Survey will be published quarterly.