



Employers' post-Brexit workforce strategies and their use of migrant workers



Findings from the Labour Mobility in Transition (Limits) survey of employers

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Table of contents

Executive summary	3
1. Introduction	5
2. Methodology	7
3. Changes in employment arrangements	12
4. Changes in the use of migrant labour	16
5. Recruitment, vacancies, and responses to shortages	20
6. The migration regime in the UK	29
7. Communication, representation and dialogue	34
8. Conclusions	37
References	38
The ESRC Labour Mobility in Transition (LIMITS) project	40

Executive Summary

This report presents the key findings of a survey of 1,651 employers conducted between July 2022 and March 2023 across England, Wales and Scotland in 4 sectors: hospitality, warehousing and transport, adult social care and food and drink manufacturing.

The survey of establishments explored the strategies used by employers to respond to increasing labour shortages and the changing labour migration environment post-Brexit.

The specific areas covered by the survey were: changes in employment (changing contract types and employers' use of migrant labour); the extent of vacancies, and hard to fill vacancies; responses to labour shortages; employers use and perceptions of the new migration regime in the post-Brexit period; communication and dialogue around migration; and sectoral engagement with the emerging migration regime.

Findings

Some establishments increasing the use of workers on 'non-standard' (temporary, agency and self-employed) contracts, especially since 2020, whilst others have increased numbers of workers on direct employment contracts. Our findings thus point to some flux in employer strategies during the post-Brexit and COVID-19 periods but considerable continuity and business as usual.

For those firms that changed, adjustment mechanisms have been reactive and 'ad hoc' as much as strategic, reflecting considerable uncertainty in the immediate post-Brexit period.

Regarding the use of migrant workers there is little evidence of a seamless movement away from EU migrant labour following the EU referendum, in contrast to suggestions that this would be a strategy that many employers would be able to straightforwardly adopt in the post-Brexit period.

Concerning the reasons for labour shortages and hard to fill vacancies (which were significant across all our sectors, especially in social care and hospitality), half of employers with hard-to-fill vacancies (49%) indicated that a reduction in the

supply of migrant workers (from the EU or outside the EU) was a cause of their labour shortages,

However, whilst Brexit was seen as a factor for shortages by the respondents, other long-standing factors in these sectors were seen as most important, namely: low pay levels; poor progression opportunities; and conditions of work.

In terms of responses to labour shortages, changes in the use of migrant labour (towards UK workers, or workers from outside EU) was not considered as one of the most important strategies to address worker shortages, in any of the 4 sectors surveyed.

Instead, improvements in pay and conditions were indicated as the most important responses. However, pay increases need to be seen in the context of all four sectors being relatively low-paying, with pay for many roles benchmarked against the National Minimum Wage (NMW), and with pay increases often reflecting statutory rises in the NMW.

The use of automation as a strategy to address labour shortages was cited by around 1 in 7 establishments, indicating that this was not one of the most important or common responses to shortages. This is likely to be because investments in automation and technology to address labour shortages requires long-term planning and expensive investment which may not be undertaken in periods of uncertainty. Furthermore, employers may be looking at (what they perceive to be) quicker and cheaper alternatives than automation to address labour shortages, including the greater use of non-standard contracts and new groups of migrant workers, which may seem more attractive.

In terms of successful strategies to respond to shortages those most frequently cited across the four sectors were: increasing opportunities to work flexibly, increasing pay, improving training, and greater use of employment agencies.

Findings continued

The persistence of low pay across the four sectors is also noted as one of the reasons why employers in these sectors tend not to have used the new immigration system to recruit workers. The survey found that relatively few job roles in the four sectors would be eligible for a skilled worker visa¹.

The high visa salary threshold is the main reason why few employers in the survey have made use of sponsored visas for non-UK workers. This percentage was just 5% across the whole sample, rising to 7% in the social care sector.

In terms of dialogue around immigration a small minority of firms (17% of respondents) felt that there were ongoing opportunities to consult with Government over labour shortages. Very few participant companies indicated that they had been consulted by the government trade bodies or employer representative bodies on shortages and immigration reform.

Overall, we find that Brexit and COVID-19 have both had significant impact upon employment strategies in all 4 sectors, namely in terms of widespread labour shortages, particularly since 2020 when the effects of the end of free movement of workers overlapped with many EU workers leaving the UK during or after the lockdowns.

Our survey findings can be contrasted with assumptions in rhetoric and government White Papers about employers and the post-Brexit labour market. Rather than seamless substitution away from EU migrant labour, automation, re-training of workers, or improving pay and conditions, we see a variety of reactive strategies, and considerable continuity in workforce strategies.

Most of the changes in employer strategies have occurred outside of the immigration system. Strategies used vary across sectors and firm size: the extent of use of migrant labour, and extent of use of non-standard labour are also key determinants (and constraints) on strategies being used. We conclude that shortages do reflect wider, long-standing issues in each sector, which may require other policies (government and individual employer) to address in the areas of training and upskilling, employment relations, and workplace innovation.

¹ It is important to note that some roles and jobs in some of the sectors studied in this report, such as Social Care, have been added to the Shortage Occupation List, and specific visa schemes in some sectoral areas have also been introduced. These have allowed employers to make use of the visa scheme for migrant workers at lower salary thresholds.

Introduction

This report examines employers' use of migrant workers, and employers' workforce strategies in the post-Brexit period. Since the EU Referendum in 2016, and the decision to leave the European Union, a new points-based system of migration has been introduced, and freedom of movement of workers from the EU to the UK has ended. Alongside this, the COVID-19 pandemic has also impacted upon the labour market in the UK, and shaped employer workforce strategies. This report looks at how the end of freedom of movement as a result of Brexit, alongside the COVID-19 pandemic has impacted the labour market and shaped employer labour use strategies.

The report draws on findings from a new employer survey of 1,651 establishments in social care, warehousing, hospitality and food and drink processing. The survey was conducted between August 2022 and February 2023.

Data were gathered from a senior management representative in each establishment firm, via a 40-minute telephone survey, along with the completion of a workforce data sheet. The 4 sectors were selected as they have historically employed a high share of migrant workers, and where jobs are relatively low paid. As a result of the new points-based migration regime, many workers looking to work in these sectors are explicitly excluded from migration to the UK post-Brexit.

All 4 sectors are ones where there have been widely reported labour shortages in the post-Brexit period, and where vacancy levels have reached record highs between 2020-2022 (Sumption et al., 2022). Yet, there remains little evidence and understanding about the specific responses of employers, differences across sectors, and the rationales behind these strategies.

The key aim of this report is to provide new evidence on employer workforce strategies, specifically considering the following questions:

- How have employers' use of migrant workers in these sectors changed since 2016, and what factors have driven any changes?

- What other changes have been observed in terms of employers' use of workers on different contract types (permanent, temporary, agency and zero hours contracts) and why?
- What are employers' perceptions towards the new migration regime and how are they adapting HR processes and policies?
- How are organisations communicating with workers around the new migration regime, and to what extent is there social and sectoral dialogue around migration?

Many accounts suggest that, faced with a shortage of low paid labour (as a result of Brexit, the pandemic, or both), employers might substitute labour for new technologies, look to alternative sources of labour (from the UK, or outside the EU) or look to attract more workers by improving pay and conditions of work. Indeed, the UK government has pinpointed substitution strategies (to alternative sources of labour, or automation) as a means through which employers might look to reduce 'reliance on the UK's immigration system' to meet their labour needs (see for example, Home Office, 2018).

However the adoption of such strategies may be complex and challenging for individual employers (see Alberti and Cutter, 2022). Furthermore, strategies may vary across sectors, between firms within sectors, and over time (see CIPD, 2023). In this report we provide new, nationally representative evidence from a large-scale survey on employer strategies, and employers' use of labour in the post-Brexit, post-COVID environment.

The report is thus able to provide important new insight into whether, how and why employers are changing their workforce strategies and use of migrant workers. We find some limited evidence of substitution of workers, away from EU workers towards UK workers, or workers from outside the EU, from some employers. However, other employers have not changed their use of EU migrant labour and are adopting a 'business as usual' approach to labour strategies. Our findings point to the real-life limitations to the development and implementation of substitution strategies, in a context of regulatory uncertainty and relatively poor terms and conditions persisting in these sectors.

Many employers in the 4 sectors surveyed have faced significant labour shortages in the post-Brexit period. Our survey highlights some flux in labour use strategies, and points to reactive responses rather than strategic responses from many employers towards these labour shortages and the use of migrant workers.

It was assumed by government that, faced with labour shortages in the post-Brexit period, employers would seamlessly adjust and respond through one or more of three broad strategies: improving pay and conditions to attract more workers; substituting away from workers in short supply towards other workers (for example away from EU migrants to UK workers or workers from outside the EU); or replacing workers through automation or stopping/relocating some production or services (Home Office, 2018). All three of these responses have created challenges for employers. In highlighting how employers have responded in practice, our report provides important new evidence on the limits of and contradictions within UK migration policies in terms of their ability to address acute and long-standing labour shortages in the 4 sectors considered.

The report is structured as follows.

In section 2 the methodology used for the survey research is outlined. Section 3 looks at changes in employment after Brexit and COVID, focusing on employers' use of different contractual arrangements. Section 4 looks at employers' use of migrant labour and UK workers in the post-Brexit and COVID periods. Section 5 looks at recruitment, vacancies reasons for shortages, and responses to labour shortages. Section 6 considers employers strategies and perceptions of the new migration regime in the post-Brexit period in the UK. Section 7 looks at communication and dialogue around migration as well as sectoral engagement with the emerging migration regime. Section 8 offers some conclusions.

Methodology

The Labour Mobility in Transition ('L(I)MIT(S)') survey of employers was developed in Spring 2022 and carried out between July 2022 and March 2023. There were 2 elements to the survey, a self-completion datasheet providing establishment level profile data, and a structured survey, delivered through a Computer Assisted Telephone interview (CATI) by IFF Research.

The reason for the two parts was because it was judged that the questions relating to workforce size and makeup would require many respondents to provide detailed information that they would not have to hand or be able to recall easily. These questions therefore made up the online data sheet. The questions relating to hiring and employment strategies were judged to be suitable for a CATI survey in which the respondent would be able to answer immediately.

Both parts were to be completed by a senior representative in the organisation in Human Resources, or with knowledge of HR and employment issues in the establishment. In practice, this respondent was a senior HR manager, or owner/manager in the firm.

While they were programmed and administered separately, the two parts of the survey were designed to be complimentary and for respondent's data to automatically link between the two. Further, a key consideration in the design was for the respondent's experience to be as seamless as possible. So rather than creating two separate questionnaires, a single questionnaire was designed that encompassed both parts of the survey which included routing instructions and screening criteria that allowed for flexibility in how the research was conducted – specifically, to allow for respondents to complete the two parts of the survey in either order.

Engagement and feedback from stakeholders were gathered throughout the development of the survey instrument. Possible questions and areas of focus had been identified and these were discussed at employer and industry stakeholder roundtables. Input and feedback were sought from the project industry and academic advisory boards, and feedback on a draft of questions was also gathered from representatives from government departments, notably the Home Office and the Treasury. Comments were also incorporated from members of the Migration Advisory Committee, and from IFF.

The 4 sectors being covered in the survey were 1) social care, 2) hospitality, 3) food and drink processing and 4) warehousing and transport. The aim was for a sample of 1,600 responses across 4 sectors. The survey focused only on establishments with 5 or more employees.

IFF Research sourced the contact details and firmographic information of 16,000 establishments with more than 5 employees in the social care, hospitality, food processing, and warehousing and transport sectors. This information was sourced from the database 'Market Location', based on a 10:1 ratio (i.e. IFF Research estimated that for every 10 establishments sampled, there would be one full complete) and on achieving a representative spread based on size of establishment in each sector and the overall population of firms in each sector.

Piloting of the telephone CATI and datasheet took place in July 2022. Fieldwork was undertaken between July 2022 and March 2023. During the fieldwork period, it was necessary to source more sample to boost response rates. The details of a further 5,563 establishments were sourced in October 2022. 1,280 establishments completed both elements. 1,354 firms completed the CATI, and 1,651 firms completed the datasheet. In this report, data are reported from all those who had completed a particular part of the survey.

The overall response rate for the survey was 40%, calculated as 'achieved CATIs' as a proportion of all 'complete contacts'. The tables below provide a detailed breakdown of survey outcomes for each part (CATI and datasheet). Table 1 shows the number of responses by sector. With the initial aim of gathering 500 responses from each of the hospitality and social care sectors, and 300 responses from warehousing and food and drink processing, the achieved numbers show some minor variation from this in the final sample distribution.

Table 1: Number of responses by sector

	Social care	Hospitality	Food and Drink processing	Warehousing	All
Number of responses	541	595	250	265	1651
Proportion of total responses	33%	36%	15%	16%	100%

Table 2 offers a breakdown of the sample by establishment size. Half of the sample had between 5-19 employees, with just 7% having more than 100 employees. Smaller firms thus made up a large proportion of the sample, reflecting in part the distribution of firms in some of the sectors covered (particularly hospitality and social care, where there are a high proportion of small firms). Our analysis below takes into account the profile and size of the majority of our firms in the sample to make sense of the data.

Table 2: Size of establishment

Number of employees	Frequency	% of total
5-9	405	25
10-19	453	27
20-49	444	27
50-99	163	10
100-249	83	5
250+	29	2
Missing	74	5
All	1651	100

In terms of turnover, Table 3 shows that just over half of the sample had a turnover of less than £1 million per year. One in ten firms had a turnover of more than £5 million per year.

Table 3: Turnover

Annual turnover	Frequency	% of total
£25k-£99k	5	0.5
£100k-£249k	135	8
£250k-£499k	320	19
£500k-£999k	435	26
£1m-£1.99m	275	17
£2m-£4.99m	292	18
£5m-£9.99m	102	6
£10m-£49.99m	79	5
£50m+	8	0.5

Respondents were spread across England, Scotland and Wales (Table 4). With the ongoing uncertainties and discussions about the post-Brexit agreement in Northern Ireland and Ireland at the time of the research, we did not include Northern Ireland establishments in the survey. The geographical distribution of firms in the sample is broadly representative of the distribution of firms in England, Wales and Scotland (see ONS, 2023). One-quarter of respondents were based in London and the South-East, whilst 11 per cent were based in the east of England and the South-West of England, with 9 per cent in Yorkshire and the Humber. 10 per cent of the sample was from Scotland and 6 per cent from Wales.

Table 4: Region

Region	Frequency	Proportion of sample
East Midlands	111	6.7
East of England	184	11.1
London	172	10.4
North East	59	3.6
North West	166	10.1
South East	241	14.6
South West	176	10.7
West Midlands	132	8.0
Yorkshire & the Humber	144	8.7
Scotland	163	9.9
Wales	103	6.2
Total	1651	100.0

N=1,651

28 per cent of the sample were in an establishment that was part of a larger organisation. Of those that were part of a larger organisation, 76% (290) were part of an organisation where all sites were based in the UK, and 24% (92 establishments) were part of a multinational corporation.

Table 5 shows that two thirds of respondents were in the private sector. A relatively small number of establishments were in the public sector, but a relatively large proportion were from the voluntary or third sector (this reflects the nature of one of our sectors, adult social care, where there are a relatively high number of third sector providers).

Table 5: Public, private or third sector

	Number	Proportion
Private sector	905	67
Public sector	44	3
Voluntary/third sector	397	29

All 4 sectors have been characterised as relatively low-paying sectors (see for example Low Pay Commission, 2024; CIPD, 2023; Bessa et al, 2013). The survey provided direct evidence of this, with questions asking employers about the proportions of staff paid: at or above the National Minimum Wage (NMW) rate at the time of the survey for workers aged 21; the mean average wage level for full-time workers in the UK at the time of the survey (£15.44 per hour, equating to £29,700 annual salary); and the annual salary threshold for workers to access a skilled worker visa (£25,600).

Looking first at the proportions of staff paid at or above the NMW rate for workers aged 21+ (Table 6), in most firms many staff were paid above this rate. In food and drink processing and warehousing, more than three quarters of employers surveyed paid all their staff above this rate. The figure was lower in hospitality, where just over half of firms surveyed (54%) paid all their staff at or above the NMW rate for 21+. Around one in 10 firms in warehousing indicated that no staff were paid at or above the NMW rate for workers aged 21+.

Table 6: Proportion of staff in organisation who are paid at or above £9.50 per hour (National Minimum Wage rate for workers aged 21+ at time of survey)

Proportion of Staff paid at or above NMW rate for 21+	Social care	Hospitality	Food and Drink processing	Warehousing	All
0%	7%	2%	4%	10%	5%
1-24%	5%	3%	6%	3%	5%
25-49%	4%	10%	2%	2%	4%
50-74%	4%	15%	5%	1%	9%
75-99%	12%	17%	7%	8%	11%
100%	69%	54%	76%	77%	66%
Total	100%	100%	100%	100%	100%

N=1,354

Table 7 provides further confirmatory evidence that all four sectors are relatively low paid. At least 1 in 4 firms in each of the four sectors indicated that none of their staff was paid at or above the UK mean average wage or full-time average salary at the time of the research. Hospitality was the lowest paying sector, with 49% of firms indicating that no staff were paid at or above the UK mean average wage. As we explore below, these relatively low pay levels are a key part of the explanation for the low up take of new visa routes for employers across all four sectors.

Table 7: Proportion of staff in organisation who are paid at or above UK mean average for full time worker (£15.44 per hour or £29,700 annual salary)

Proportion of staff paid at or above UK mean average rate (£15.44 per hour)	Social care	Hospitality	Food and Drink processing	Warehousing	All
0%	25%	49%	26%	15%	32%
1-24%	41%	27%	26%	16%	32%
25-49%	15%	8%	19%	15%	13%
50-74%	9%	3%	19%	17%	9%
75-99%	6%	2%	4%	18%	7%
All staff (100%)	4%	2%	6%	19%	6%
Total	100%	100%	100%	100%	100%

N=1,354

Finally, Table 8 provides some initial evidence of the challenges that employers in the four sectors surveyed have accessing workers through skilled worker visa routes in the post-Brexit period. Four in ten employers in hospitality, 30% in warehousing and 1 in 4 employers in social care and food and drink processing employed no workers that were paid at or above £25,600 – the annual salary threshold for full time workers to be able to access a skilled worker visa. Overall, relatively few job roles in the four sectors would be eligible for a skilled worker visa (although roles and jobs in some sectors, such as social care have been added to the Shortage Occupation List).

Table 8: Proportion of full-time staff in organisation who are paid at or above £25,600 – the level for a skilled worker visa

Proportion of full time staff paid above £25,600	Social care	Hospitality	Food and Drink processing	Warehousing	All
0%	24%	40%	25%	22%	29%
1-24%	28%	39%	26%	10%	32%
25-49%	13%	10%	17%	7%	11%
50-74%	11%	5%	13%	15%	10%
75-99%	8%	3%	11%	19%	8%
All full-time staff (100%)	6%	3%	8%	27%	9%
Total	100%	100%	100%	100%	100%

N=1,354

The care sector

According to recent research (e.g. Portes, 2024: 8) a large proportion of migrants on skilled work visas are to be found in social care (the health and social care sector accounts for 2/3 of all worker visas, and within this, more than 2/3, around 100,000 visas, are for care workers, the category with lowest skills). Since March 2022 employers have been able to hire migrants on a three or five year Health and Care worker visa on a lower salary threshold of £20,480 (Migration Advisory Committee, 2021). While the lower salary threshold has been introduced to respond to severe labour shortages in these critical public services (reluctantly, given the long-standing position of the Migration Advisory Committee about the need to improve pay and conditions to make the sector attractive to local workers), it is important to note that vacancies remain high. This is unsurprising, given that even the lower salary threshold is higher than the average salary that would be earned by a worker employed in a full-time job at the National Minimum Wage level. Overall, migration dynamics in the care sector reveal how the lowering of thresholds allows for a greater use of the visa system by employers, however, this does not address long-term issues in the sector around low pay and poor conditions.

Changes in the employment model and contractual arrangements used by employers

How has employers' use of different contract types changed following Brexit and the end of free movement of labour, and during the COVID-19 pandemic? There has been much interest in employers' use of 'contingent' or non-standard labour, including temporary workers, self-employed contractors, temporary agency workers and zero-hours contract workers. The use of these workers by employers, alongside or as an alternative to direct employment contracts, may be driven by a range of factors, including the relative costs of such forms of employment, employer Human Resource Management (HRM) strategies, and employment regulations.

Some have argued that employers may strategically choose between different contingent employment arrangements based on factors such as relative costs (Benassi and Kornelakis, 2021). However, the use by employers of different contract types, and changes in use may also be highly reactive and ad hoc, and strategies and approaches may vary and change over time, and across sectors (see for example, Hopkins, 2014; MacKenzie and Forde, 2009; Smith and Zheng, 2022). Outsourcing labour provision and HR functions with agency staff may be functional for employers in terms of managing fluctuations in labour needs and "distancing flexibility" as evidenced by past research in the hospitality sector (Lai, Soltani and Baum 2008). Do employers make greater use of non-standard contracts and agency staff to respond to shortages and ongoing uncertainties in a relatively tight labour market?

Table 9 looks at the extent of use of workers on non-standard employment contracts by respondents at the time of the survey. Just over half of employers in the sample employed at least one worker on a zero-hours, temporary or agency contract.

For 28% of firms, more than a quarter of the workforce were on non-standard contracts (classified as 'high' users of non-standard labour), whilst a further 13% of firms employed between 10-25% of the workforce on non-standard contracts (labelled as 'medium' users).

Firms in hospitality and the care sectors were much more likely to be high users of non-standard labour. In hospitality, 44% of respondent firms were high users, and in care, 22%. This reflects well-known features of employment in these sectors, with the use of zero-hours contracts, agency and temporary labour being widespread in both these sectors.

The use of non-standard labour was also quite widespread in food and drink manufacture and warehousing, with 30% of firms in the former and a quarter of firms in the latter using having 10% or more of their workforce on non-standard contracts.

Table 9: Proportion of workforce on non-standard employment contracts

Non-standard employees	Care	Hospitality	Food and Drink processing	Warehousing	All
Zero use	45%	43%	56%	64%	49%
Low use (10% or less of the workforce)	14%	4%	15%	13%	10%
Medium use (More than 10% but less than 25% of workforce)	20%	9%	13%	9%	13%
High use (25% or more of the workforce)	22%	44%	17%	15%	28%
Total	100%	100%	100%	100%	100%

Further analysis (Table 10) revealed there were some similarities and some differences between small and larger firms in the sample in terms of the proportions of workers on non-standard contracts. Larger firms were more likely to use non-standard labour. Smaller firms were more likely to indicate that they didn't employ any workers at all on non-standard contracts (60% of firms with 5-9 employees, compared to 20% of firms with 100+ employees, for example).

Table 10: Non-standard labour use by firm size

	5-9 employees	10-49 employees	50-99 employees	100+ employees	Total
Zero use	61.1%	48.7%	37.7%	25.9%	49.1%
Low use (10% or less of the workforce)	0.0%	10.2%	21.0%	31.3%	10.2%
Medium use (More than 10% but less than 25% of workforce)	12.1%	11.7%	17.3%	18.8%	12.9%
High use (25% or more of the workforce)	26.7%	29.5%	24.1%	24.1%	27.8%
Total	100%	100%	100%	100%	100%

The survey findings reveal that there had been some change in the types of contracts employers were using in the immediate post-referendum period (2016-2019) (Table 11) and the COVID-19 period (January 2020 to the time of the survey in the second half of 2022/early 2023 period) (Table 12). Looking at all establishments in the sample first (right hand column in each table), in both periods, more employers reported increasing the proportion of workers on each of temporary (including zero hours), agency contracts and self-employed contracts than were decreasing their use. For example, in the 2016-2019 period, fifteen percent of employers increased the proportion of workers on temporary contracts, whilst 11 per cent decreased the proportion. A greater amount of overall change in the use of contingent workers (increases and decreases) can be seen in the COVID period (Table 12) than the immediate post-referendum period.

Somewhat contradictorily, Tables 11 and 12 also show that some employers were increasing the proportion of workers on directly employed contracts in both periods. Between the start of 2020 to the time of the survey, for example, 29 per cent of employers increased the proportion of workers on directly employed contracts, whilst 24 per cent decreased the proportion. It is also important to note that the norm in both periods, was for employers to report 'no change' in the proportions of workers on directly employed, or contingent employment contracts (for example, 51% of employers reported no change in the proportion of workers on directly employed contracts in the COVID period. Overall, these findings point to some flux in employers' strategies towards employing workers on direct and temporary, agency and self-employed contracts in both periods. For many employers, though, it was 'business as usual' in terms of their continuation of workforce strategies that they had used in the pre-Brexit period.

For those firms that changed, the mixed findings may reflect considerable uncertainty in the immediate post-Brexit period, with some looking to consolidate and retain workers through greater use of direct employment contracts, and others seeking to manage uncertainty by employing more workers on temporary or agency contracts. Approaches may be as reactive and ad hoc as much as strategic in this uncertain environment, as employers seek to adjust to the new post-Brexit reality. Larger firms may tend to have more flexibility and financial resources in terms switching their recruitment strategies at times of crisis, and even if it is at a cost, they prefer to 'distance flexibility' (Lai et al 2008) and increase the use of labour providers and agency staff in the face of tighter labour market and fluctuations in demand.

Looking at differences by sector, the responses in Tables 11 and 12 provide further evidence of this flux and uncertainty. Some sectors have seen a greater proportion of firms that have increased direct employment (for example food processing and warehousing) than other sectors. Similarly, in some sectors, there has been greater recourse to workers on agency contracts (social care), or temporary contracts, in one or both periods considered. This may reflect long-standing use of workers on such contracts in particular sectors or may reflect preferred options to deal with labour shortages in specific periods, such as during the COVID-19 pandemic. Overall, the findings point to some flux and change, but with most employers continuing with strategies they had used in the pre-Brexit period. The reasons for this will be explored in more detail in section 6 below.

Table 11: Have the proportions of workers employed on the following contracts increased or decreased between June 2016 (referendum) and Dec 2019?

	Social care	Hospitality	Food and Drink processing	Warehousing	All firms
Directly employed contracts (permanent)	▲ 27%	▲ 19%	▲ 31%	▲ 30%	▲ 25%
	▼ 13%	▼ 16%	▼ 17%	▼ 14%	▼ 15%
Temporary contracts (including ZHCs)	▲ 15%	▲ 17%	▲ 14%	▲ 11%	▲ 15%
	▼ 9%	▼ 12%	▼ 15%	▼ 9%	▼ 11%
Agency work contracts	▲ 11%	▲ 4%	▲ 9%	▲ 9%	▲ 8%
	▼ 5%	▼ 6%	▼ 10%	▼ 8%	▼ 7%
Self-employed/freelance	▲ 8%	▲ 5%	▲ 3%	▲ 8%	▲ 6%
	▼ 3%	▼ 4%	▼ 5%	▼ 6%	▼ 4%

N=1,365. Columns show the proportion of respondents in each sector indicating that their use of each form of contract had increased or decreased.

Not shown in the tables is 'no change' which is the remaining % summing to 100% in each cell (and in most cases is the most common response)

Table 12: Have the proportions of workers employed on the following contracts increased or decreased between January 2020 to present (COVID)?

	Social care	Hospitality	Food and Drink processing	Warehousing	All firms
Directly employed contracts (permanent)	▲ 33%	▲ 22%	▲ 32%	▲ 36%	▲ 29%
	▼ 24%	▼ 29%	▼ 17%	▼ 18%	▼ 24%
Temporary contracts (including ZHCs)	▲ 19%	▲ 21%	▲ 13%	▲ 10%	▲ 17%
	▼ 13%	▼ 21%	▼ 15%	▼ 11%	▼ 16%
Agency work contracts	▲ 13%	▲ 8%	▲ 6%	▲ 10%	▲ 10%
	▼ 6%	▼ 7%	▼ 14%	▼ 11%	▼ 9%
Self-employed/freelance	▲ 9%	▲ 7%	▲ 4%	▲ 10%	▲ 8%
	▼ 3%	▼ 6%	▼ 4%	▼ 9%	▼ 5%

N=1,365. Columns show the proportion of respondents in each sector indicating that their use of each form of contract had increased or decreased.

Not shown in the tables is 'no change' which is the remaining % summing to 100% in each cell (and in most cases is the most common response)

Changes in the use of migrant workers

How has employers' use of workers from the UK, the EU and outside the EU evolved in the post-Brexit environment? The extent to which there remains an intersection between the use of temporary, agency and migrant labour – observed in the EU enlargement of 2004 (McDowell et al., 2009) – in the post-Brexit period also remains an open question.

Table 13 looks at the extent of use of migrant workers (from within the EU and outside the EU) by respondents at the time of the survey. Four in 10 firms employed at least one migrant worker. Depending upon the extent of use, firms were classified as zero, low (10% or less of the workforce), medium (more than 10% but less than 25% of the workforce) and high (25% or more of the workforce) users of migrant workers. A quarter of firms in the sample were either medium (12% of firms) or high (13% of firms) users of migrant workers.

High use of migrant workers was more commonplace in hospitality and food and drink manufacturing, whilst firms in the care sector were more likely to not use any migrant workers. The latter finding is perhaps surprising given the introduction of the new Health and Care worker visas in March 2022, with a large proportion of migrant workers arriving via this route being in the care sector (Portes 2024:8). The reasons for the relatively low levels of migrant labour in care may be related to the timing of our survey (July 2022 to March 2023) which may not have captured the (somewhat delayed) uptake of the visa scheme by employers despite the fieldwork was ongoing for the first 12 months of its introduction.

Table 14 highlights some differences in use of migrant labour by firms of different sizes. Smaller firms in the sample were much more likely to report employing no migrant workers. Larger firms in the sample were much more likely report that migrant workers made up more than 10% of the workforce. This is not surprising given the high fees associated to visa applications for employers, whereby larger employers may have both more financial and administrative capacity to handle those recruitment costs (Squire Paton Boggs, 2023; Federation of Small Businesses, 2023). Migrant workers made up 10% or more of the workforce in 45% of firms with 100 or more employees, for example (compared to 23% of firms with 5-9 employees). In 28% of firms with 100 or more employees, migrant workers made up a quarter or more of the workforce (compared to 12% of firms with 5-9 employees).

Table 13: Proportion of workforce who are migrant workers

Migrant workers	Care	Hospitality	Food and Drink processing	Warehousing	All
Zero use	64%	56%	50%	58%	58%
Low use (10% or less of the workforce)	19%	14%	15%	18%	17%
Medium use (More than 10% but less than 25% of workforce)	10%	14%	14%	11%	12%
High use (25% or more of the workforce)	8%	16%	21%	13%	13%
Total	100%	100%	100%	100%	100%

Table 14: Extent of use of migrant workers by firm size

	5-9 employees	10-49 employees	50-99 employees	100+ employees	Total
Zero use	77.0%	57.6%	38.3%	20.5%	58.0%
Low use (10% or less of the workforce)	0.0%	18.8%	32.7%	34.8%	16.5%
Medium use (More than 10% but less than 25% of workforce)	11.4%	12.4%	9.9%	17.0%	12.2%
High use (25% or more of the workforce)	11.6%	11.3%	19.1%	27.7%	13.3%
Total	100%	100%	100%	100%	100%

Tables 15 and 16 consider employers' use of workers from the UK, the EU and outside the EU in the 2016-2019 period, and from 2020 onwards. Looking at the figures for the whole sample of respondents, there had been some changes in the use of workers from the UK, and migrant workers (right hand column of Tables 15 and 16). In the immediate post-Brexit period, up to the end of 2019 (Table 15), one in 5 employers reported that the proportions of workers they were employing from the UK increased (with one in 10 reporting a decrease). This suggests some limited movement towards the employment of UK workers.

More employers reported a decrease in the proportion of workers from the EU than reported an increase, and conversely, more employers reported an increase in the proportion of workers from outside the EU than those reporting a decrease. This does suggest some limited movement away from EU workers. However, this movement was limited. Most employers reported no change in the proportions of EU workers employed. There is little evidence here of a seamless movement away from EU migrant labour following the referendum, in contrast to suggestions that this would be a strategy that many employers would be able to straightforwardly adopt. The evidence here is perhaps reflective of employers' challenges in adjusting workforce strategies, and a desire to continue with long-standing employment and workforce strategies when using workers from the UK, EU and outside the EU. This finding resonates with those from other recent surveys of employers (see for example, CIPD, 2023) where the complexities and challenges faced by employers in their workforce strategies post-Brexit have been set out.

Table 15: Have the proportions of workers from the UK, EU and outside the UK/EU increased or decreased between June 2016 (referendum) and Dec 2019?

	Social care	Hospitality	Food and Drink processing	Warehousing	All firms
UK workers	▲ 20%	▲ 18%	▲ 23%	▲ 22%	▲ 20%
	▼ 9%	▼ 11%	▼ 9%	▼ 9%	▼ 9%
Workers from the EU	▲ 9%	▲ 9%	▲ 10%	▲ 11%	▲ 9%
	▼ 8%	▼ 18%	▼ 16%	▼ 14%	▼ 10%
Workers outside the UK/EU	▲ 8%	▲ 9%	▲ 7%	▲ 4%	▲ 8%
	▼ 4%	▼ 7%	▼ 6%	▼ 6%	▼ 5%

N=1,365. Columns show the proportion of respondents in each sector indicating that their use of each form of contract had increased or decreased.

Not shown in the tables is 'no change' which is the remaining % summing to 100% in each cell (and in most cases is the most common response)

Table 16: Have the proportions of workers from the UK, EU and outside the UK/EU increased or decreased between January 2020 to present?

	Social care	Hospitality	Food and Drink processing	Warehousing	All firms
UK workers	▲ 31%	▲ 31%	▲ 31%	▲ 33%	▲ 32%
	▼ 18%	▼ 20%	▼ 19%	▼ 13%	▼ 18%
Workers from the EU	▲ 9%	▲ 7%	▲ 9%	▲ 6%	▲ 8%
	▼ 10%	▼ 26%	▼ 22%	▼ 17%	▼ 19%
Workers outside the UK/EU	▲ 11%	▲ 10%	▲ 14%	▲ 5%	▲ 10%
	▼ 6%	▼ 13%	▼ 8%	▼ 8%	▼ 9%

N=1,365. Columns show the proportion of respondents in each sector indicating that their use of each form of contract had increased or decreased.

Not shown in the tables is 'no change' which is the remaining % summing to 100% in each cell (and in most cases is the most common response)

In the period from 2020 onwards, there was evidence of more flux in employers use of workers from the UK, EU and outside the EU (Table 16). In this period, more employers reported a move towards UK workers, and a decline in the proportions of workers employed from the EU. 32 per cent of the sample reported an increase in the proportion of workers from the UK, compared to 18 per cent reporting a decrease. One in five firms reported a decrease in the proportion of workers in their establishment from the EU, compared to less than one in ten reporting an increase. Nonetheless, the most common response for all firms was to report no change in the proportions of workers from the UK, EU and outside the EU in either period, suggesting much continuity in employment strategies for UK and migrant labour.

Tables 15 and 16 also show some differences by sector. The move towards UK workers is perhaps most observable in warehousing and food and drink processing. There have been fewest firms in social care that have reduced their use of EU workers, and this may reflect the inclusion of care workers on the shortage occupation list in 2022 (although Portes (2024) notes that care workers have been mostly recruited from outside the EU). Hospitality was the sector where the largest proportion of firms decrease their use of EU migrant labour, with one quarter of employers reporting a reduction in the COVID period. The findings point to no stark or straightforward purposeful substitution away from EU workers towards UK or non-EU workers by employers. There does appear to be some organic change and substitution in some sectors, but overall, the findings point to considerable variation in approaches by employers, reflecting some flux and uncertainty, but also some evidence of many employers continuing to adopt long-standing approaches to the employment of workers from the UK, EU and outside the EU.

Recruitment, vacancies, and responses to shortages

Table 17 summarises the survey data on recruitment and vacancies. Looking first at recruitment, 84% of employers had recruited workers in the last 12 months. Figures were high across all sectors, with social care being the highest at 88%. Nearly half employers had current vacancies.

Turning to vacancies (Table 18), nearly half (48%) had current vacancies. Looking at each sector, the highest proportion of firms with vacancies was social care (54%). One in 12 employers in social care had 6-10 current vacancies, a figure which was higher than in the other 3 sectors.

The main areas where there were vacancies were in elementary occupations (driving, operatives), admin and related (more than 20 employers reporting vacancies in this area across the sample), health related (nurses and physios), and chefs and catering. There were multiple employers reporting vacancies also care workers.

Returning to Table 17, one in 6 employers in the survey (16%) indicated that they had hard-to-fill vacancies, figures that were highest in care and hospitality. When shown as proportion of those establishments with current vacancies, nearly three-quarters of firms (73%) with vacancies indicated they some of these were hard-to-fill. The proportion of firms with vacancies that indicated that they were hard-to-fill was highest in hospitality at 85%, indicating particularly acute shortages in this sector. However, in all 4 sectors, two thirds or more of firms with vacancies indicated that some of these vacancies were hard to fill, indicating severe recruitment challenges and shortages across all 4 sectors.

Table 17: Vacancies, as reported between August 2022-January 2023

	Social care	Hospitality	Food and Drink processing	Warehousing	All firms	N:
Have you recruited any workers to this establishment in the last 12 months?	88%	85%	81%	77%	84%	1354
Do you have any current vacancies?	54%	44%	42%	46%	48%	1284
Do you have any hard to fill vacancies (establishments as proportion of all respondents in that sector)	18%	16%	13%	13%	16%	1354
Do you have any hard to fill vacancies (establishments as proportion of all those with current vacancies)	66%	85%	70%	73%	73%	291

Table 18: How many vacancies do you currently have at this establishment?

	Social care	Hospitality	Food and Drink processing	Warehousing	All
Zero	46%	56%	58%	54%	52%
1 to 5 vacancies	46%	40%	39%	44%	42%
6 to 10 vacancies	8%	5%	4%	2%	5%

N=1284, Vacancies as reported between August 2022-March 2023

What were the main causes of hard-to-fill vacancies? Respondents with hard-to-fill vacancies were asked to identify all the reasons why their vacancies were hard-to-fill and these are summarised in Table 19. The two most cited reasons were that there were simply not enough applicants interested in applying for roles in the sector (62%), and a low number of applicants with the required motivation or skills (62%). These findings highlight the challenges and difficulties faced by employers in attracting workers. Low wage levels were also seen as an important reason for hard-to-fill vacancies, cited by 61% of employers. Alongside these 3 reasons a further aspect that was highly cited was poor progression and prospects (31%). Together, these show that the key reasons for hard-to-fill vacancies and labour shortages relate to pay and conditions of work.

These reasons were also widely cited by employers in each of the four sectors in the sample. In warehousing, nearly three-quarters of employers (72%) said that there were low numbers of applicants with the required motivation or skills, with a smaller proportion – although still high at 44% - indicating that wages were too low. A smaller proportion of employers in warehousing (just under 1 in 5) pointed to poor progression opportunities. Ongoing qualitative interviews with employers in warehousing have pointed to 'sector attractiveness' as a key issue behind ongoing labour shortages and there is evidence of this from the survey data reported here. In social care, low wages were cited as a very high proportion of employers – three-quarters – with over a third reporting poor progression and prospects. These findings confirm long-standing issues around recruitment and retention in the sector (ReWage, 2024, forthcoming).

Other important reasons for hard-to-fill vacancies were related directly to Brexit and the new migration regime. Half of employers with hard-to-fill vacancies (49%) indicated that a reduction in the supply of migrant workers (from the EU or outside the EU) was a cause of labour shortages. In hospitality, nearly 2/3 of employers indicated that this was a reason for labour shortages and 52% of employers in food and drink processing.

Some other reasons appeared to be more of a factor in some sectors compared to others. In warehousing, one in six employers indicated that the location of work was a factor behind labour shortages. Pandemic conditions were cited by a higher proportion (11%) of employers in social care, compared to the other three sectors. Overall, though, factors related to pay and conditions of work, along with the new migration regime were by far the most important reasons in all four sectors.

Table 19: What the main reasons for vacancies being hard to fill? (reasons as % of respondents in a sector with hard-to-fill vacancies)

	Social care	Hospitality	Food and Drink processing	Warehousing	All
Not enough people interested in applying for the roles	57%	66%	64%	61%	62%
Low number of applicants with required motivation or skills	55%	65%	64%	72%	62%
Wage levels too low	75%	58%	46%	44%	61%
Poor progression/prospects	36%	35%	25%	19%	32%
Reduction in supply of workers from inside/outside the EU	38%	64%	52%	35%	49%
Low number of applicants generally	15%	11%	10%	11%	12%
Pandemic conditions	11%	8%	2%	7%	8%
Competition from other firms in sector	11%	6%	12%	3%	8%
Location of work	9%	7%	8%	16%	9%
Lack of flexibility in where to work	0%	1%	0%	1%	1%
Lack of qualifications	2%	2%	3%	3%	2%
Physical conditions of job	1%	3%	2%	3%	2%
Unsocial hours	5%	5%	5%	1%	4%
Changing visa regulations	0%	2%	0%	0%	1%

N=500

Did the reasons for labour shortages vary depending on whether employers' currently use non-standard workers and migrant labour? Table 20 and Table 21 provide some answers to these questions. In Table 20, the most common reasons for labour shortages are reported for firms reporting no, low, medium and high use of non-standard workers. Broadly, the reasons reported were similar across these firms, although high users of non-standard labour were more likely to report that there were generally lower numbers of applicants for jobs. We may infer that the use of non-standard contracts constitutes in itself a response to shortages and uncertainty. This hypothesis is being corroborated by this study's qualitative interviews with some of the large firms where procurement managers confirmed a greater use of agency staff as a response to the tighter labour market and changing immigration context. In the survey medium and high users of non-standard labour were also more likely to report that a reduction in supply of migrant workers was a reason for labour shortages.

Table 21 looks at reasons for labour shortages by employers grouped by whether they were low, medium and high users of migrant labour. Again, broadly, the reasons for labour shortages were similar across all these groupings. Firms who were medium or high users of migrant workers were more likely to report that there were low numbers of applicants with the required motivation or skills, and that a reduction in the supply of migrant workers were reasons for shortages, perhaps pointing to the impact of the changing migration regime for these particular firms.

Table 20: What the main reasons for vacancies being hard to fill for firms with no, low, medium and high use of non-standard labour

	No use of non-standard workers	Low use of non-standard labour (10% or less of the workforce)	Medium use of non-standard labour (More than 10% to 25% of the workforce)	High use of non-standard labour (More than 25% of the workforce)	All firms
Not enough people interested in applying for the roles	63%	60%	63%	60%	62%
Low number of applicants with required motivation or skills	64%	60%	76%	53%	62%
Wage levels too low	57%	69%	64%	62%	61%
Poor progression/prospects	30%	40%	23%	34%	32%
Reduction in supply of workers from inside/outside the EU	46%	48%	58%	51%	49%
Low number of applicants generally	9%	13%	15%	17%	12%
Pandemic conditions	6%	14%	15%	6%	8%
Too much competition from other firms	6%	13%	7%	10%	8%
Location of work	9%	9%	15%	8%	9%
Lack of flexibility in where to work	0%	2%	2%	3%	1%
Lack of qualifications	3%	3%	0%	3%	2%
Physical conditions of job	1%	3%	2%	2%	2%
Unsocial hours	4%	5%	0%	3%	4%
Changing visa regulations	1%	0%	0%	1%	1%

N=473

Table 21: What the main reasons for vacancies being hard to fill for firms with no, low, medium and high use of migrant labour

	No use of non-standard workers	Low use of non-standard labour (10% or less of the workforce)	Medium use of non-standard labour (More than 10% to 25% of the workforce)	High use of non-standard labour (More than 25% of the workforce)	All firms
Not enough people interested in applying for the roles	58%	64%	72%	59%	62%
Low number of applicants with required motivation or skills	55%	64%	72%	68%	62%
Wage levels too low	60%	70%	56%	60%	61%
Poor progression/prospects	32%	28%	36%	32%	32%
Reduction in supply of workers from inside/outside the EU	32%	51%	60%	49%	49%
Low number of applicants generally	15%	16%	10%	6%	12%
Pandemic conditions	8%	8%	10%	8%	8%
Too much competition from other firms	6%	13%	10%	6%	8%
Location of work	10%	12%	10%	5%	9%
Lack of flexibility in where to work	2%	2%	0%	1%	1%
Lack of qualifications	3%	2%	3%	2%	2%
Physical conditions of job	1%	2%	1%	4%	2%
Unsocial hours	5%	4%	1%	4%	4%
Changing visa regulations	1%	2%	0%	1%	1%

N=473

Table 22 on the following page outlines the main responses used by employers to address hard-to-fill vacancies. These can be grouped into three broad approaches.

The first set of responses involved looking to improve jobs to make them more attractive to applicants. Looking at the whole sample of firms (right-hand column of Table 22), the most cited strategies here were to increase pay (53%), and to increase opportunities to work flexibly (43%) and improve training (41%).

A second set of responses involved looking to attract more workers, or to target different groups of workers. One in three firms with hard to fill vacancies had adjusted recruitment towards UK workers (31%), and one in 7 (15%) had adjusted recruitment towards migrant workers. 24% were adopting recruitment campaigns to diversify the workforce, and 32% were seeking greater recourse to employment agencies. The survey does not distinguish between agencies being used to provide temporary staff, and agencies being used to provide applicants for direct employment, so it is possible that either or both are being used. Advertising campaigns and greater use of social media were also cited by one-in-four (24%) of employers.

A third set of reasons involved looking to reduce the need for workers, particularly through technological innovation. Many functional accounts suggest that, faced with a shortage of low paid labour, employers might substitute labour for new technologies or invest in training to enhance productivity of the existing workforce. Indeed, the UK government pinpointed such substitution strategies as a means through which employers might look to reduce 'reliance on the UK's immigration system' to meet their labour needs (Home Office, 2018). Our earlier roundtables with employers (Alberti et al., 2020) and ongoing qualitative research has revealed that such strategies are problematic and challenging for employers, with automation being costly, time-consuming and not a panacea for labour shortages for many roles and jobs, where labour input cannot be substituted by technology (Stuart et al, 2023). Our survey evidence bears out the realities and challenges of employers using automation as a strategy to address labour shortages – this strategy was only cited by 1 in 7 (14%) of employers with hard to fill vacancies.

There were some interesting differences by sector. The top 3 reasons (increase pay, opportunities to work flexibly and improve training) were the same across all four sectors, indicating that attempts to improve pay and conditions were the most common responses by employers. A greater proportion of firms in social care (36%) adjusted recruitment towards UK workers compared to the other sectors, however, a greater proportion of employers in social care also adjusted strategies to recruit more migrant workers, likely facilitated by the introduction of the Health and Care worker visa in March 2022 (see above). More than a third of firms in this sector had sought greater recourse to employment agencies (37%). Three in ten employers in food and drink processing were using automation as a means of addressing labour shortages. Overall, the findings point to the range of strategies being used by employers in individual sectors to address labour shortages.

Table 22: Which strategies have you used to try and address hard to fill vacancies? (*and which have been the most successful*)

Strategy	Social care	Hospitality	Food and Drink processing	Warehousing	All
Increase pay	47%	54%	56%	58%	53%**
Improve opportunities to work flexibly	43%	47%	38%	35%	43%**
Improve training opportunities	38%	44%	41%	44%	41%**
Greater use of employment agencies	37%	26%	30%	44%	32%**
Adjustment towards employing UK workers	35%	27%	29%	32%	31%
Adjustment towards employing migrant workers	20%	12%	15%	13%	15%
More automation	11%	13%	28%	11%	14%
Recruitment campaigns to diversify workforce	29%	21%	25%	20%	24%**
Signing up bonuses	1%	0%	0%	1%	1%
Using social media	10%	12%	10%	1%	10%
No vacancies	6%	12%	14%	3%	9%
Using job search websites	5%	9%	12%	3%	7%
Referrals/word of mouth	5%	6%	8%	1%	5%
Local/onsite advertising	6%	5%	5%	0%	5%

N=907 (**N=202 for most successful strategies)

The most successful strategies as reported by employers are highlighted with (**) in Table 22. For employers attempting to implement strategies to address hard to fill vacancies, changes to terms and conditions of work were seen as the most successful, with other successful strategies being increasing opportunities to work flexibly, increasing pay, improving training and increasing the use of employment agencies. Interestingly, looking to recruit more workers from the UK was not seen by employers as one of the most successful strategies. Neither was automation seen as a particularly successful strategy.

There were some interesting differences depending on employers' use of non-standard workers. Firms with the highest use of non-standard labour (25% or more of their workforce) were less likely to report that they had looked to increase pay or improve training opportunities, perhaps suggesting that for those firms, there may be limited scope to improve pay and conditions (perhaps due to the use of workers employed through employment agencies, or via third-party contracts, where the scope for employers to adjust pay and conditions may be more limited). These high users of non-standard workers also reported they were less likely to have turned to automation as a strategy to deal with shortages. This is, again, perhaps pointing to the limited strategic options for firms employing significant proportions of non-standard workers, as this is still seen as a cheaper alternative to investing in considerably more expensive technological solutions and automation.

Table 23: Responses to labour shortages by use of non standard labour

Strategy	No use of non-standard worker	Low use of non-standard labour (10% or less of the workforce)	Medium use of non-standard labour (More than 10% to 25% of the workforce)	High use of non-standard labour (More than 25% of the workforce)	All
Increase pay	55%	54%	65%	47%	53%
Improve opportunities to work flexibly	44%	40%	43%	43%	43%
Improve training opportunities	43%	40%	43%	38%	41%
More use of employment agencies	30%	43%	40%	27%	32%
Adjustment towards UK workers	31%	37%	38%	25%	31%
Recruitment campaigns to diversify workforce	24%	32%	31%	20%	24%
Adjustment towards migrant workers	14%	22%	20%	13%	15%
Automation	16%	11%	19%	10%	14%
Signing up bonuses	0%	2%	2%	0%	1%
Social media In recruitment campaigns	7%	12%	12%	13%	10%
No vacancies	9%	10%	6%	11%	9%
Job search websites	7%	9%	4%	8%	7%
Word of mouth	4%	6%	5%	7%	5%
Local/onsite advertising	4%	5%	5%	5%	5%

N=907

There were also some differences in responses to labour shortages depending on employers' extent of use of migrant workers. Firms whose use of migrant workers was highest (where migrant workers made up more than 25% of the workforce) were more likely to report that they had looked towards greater recruitment of UK workers but were also more likely to report that they had looked towards greater recruitment of (new groups of) migrant workers. The use of automation as a strategy to deal with labour shortages also varied by firms' use of migrant workers, with automation being used more by medium (17%) and high users (19%) of migrant workers. This is an intriguing finding that our qualitative case studies will explore further. It may be that automated processes may facilitate the recruitment, training and workplace integration of foreign workers and workers with limited English skills, for example. However, for all firms with varying use of migrant workers, the use of automation as a strategy to address labour shortages was not one of the most reported responses.

Table 24: Responses to labour shortages by use of migrant workers

Strategy	No use of migrant workers	Low use of migrant workers (10% or less of the workforce)	Medium use of migrant workers (More than 10% to 25% of the workforce)	High use of migrant workers (More than 25% of the workforce)	All
Increase pay	47%	58%	63%	63%	53%
Improve opportunities to work flexibly	39%	46%	50%	47%	43%
Improve training opportunities	37%	43%	53%	43%	41%
Greater use of employment agencies	23%	42%	42%	42%	32%
Adjustment towards UK workers	26%	37%	34%	39%	31%
Recruitment campaigns to diversify workforce	21%	26%	28%	33%	24%
Adjustment towards migrant workers	7%	16%	20%	36%	15%
Automation	12%	14%	17%	19%	14%
Signing up bonuses	1%	1%	0%	2%	1%
Using social media	13%	9%	7%	4%	10%
No vacancies	10%	8%	11%	5%	9%
Using job search websites	8%	8%	10%	4%	7%
Referrals/word of mouth	5%	5%	7%	5%	5%
Local/onsite advertising	65%	3%	2%	5%	5%

N=854

Further analysis showed there was some evidence that responses to labour shortages varied by firm size. Larger firms in the sample were more likely to report that they were using automation as a response to labour shortages (23% of firms with 100+ employees, compared to 13% of firms with 5-9 employees). Larger firms were also more likely to report that they had sought to increase pay (60% of firms with 100+ employees, compared to 43% of firms with 5-9 employees), offer more training (61% of firms with 100+ employees, compared to 38% of firms with 5-9 employees) and offer more opportunities for workers to work flexibly (52% of firms with 100+ employees, compared to 39% of firms with 5-9 employees). These suggest that larger firms may have more ability to adjust pay and conditions, and to undertake longer-term automation programmes to address labour shortages.

One area of focus in debates has been on the labour capacity and skills within supply chains. Long supply chains and networks have become more complex, yet these often operate with just-in-time delivery in which lean downstream operations close to markets prevail. However, chains have become increasingly fragile and shown to be easily disrupted. Firms are increasingly looking at more local sourcing and shorter chains of production, requiring more labour and skills to be available locally. In sectors like logistics in the UK, such skills are in short supply, and post-Brexit migration policy has done little to address this.

Many firms in the survey reported supply chain issues (Table 25). The most reported reasons were high import or shipping costs, cited by 7 in 10 respondents, with figures being particularly high in food and drink processing (92%), hospitality (81%) and warehousing (75%). Long delivery times were cited as important by two thirds of firms, with 87% of employers in food and drink processing citing this as an issue. Staff shortages and importing/exporting difficulties were cited by half of employers. Overall, supply chain issues were particularly problematic in food and drink processing, warehousing and hospitality.

Table 25: Have you experienced any of the following supply chain issues over the last 12 months

Supply chain issues	Social care	Hospitality	Food and Drink processing	Warehousing	All
Importing/ exporting difficulties	22%	51%	78%	61%	49%
High import or shipping costs	42%	81%	92%	75%	71%
Staff shortages	58%	58%	48%	41%	54%
Long delivery times	42%	70%	87%	70%	64%
Shortage of suppliers	0%	1%	1%	0%	1%
Delays/ challenges in other areas of business	2%	1%	1%	3%	2%
Have not experienced issues	16%	7%	3%	10%	9%

N=1187

The migration regime in the UK

In this section we report the key findings relating to the new migration regime, and particularly the end of freedom of movement of workers in the EU and the points-based system of migration.

34% of employers employed migrant workers from the EU. The highest proportion could be found in the food and drink processing sector, whereas the least (albeit still a significant proportion) are employed in social and residential care, as indicated in Table 26.

Table 26: Have you ever employed any migrant workers from the EU?

	Social care	Hospitality	Food and Drink processing	Warehousing	All
Yes	27%	36%	43%	38%	34%

N=1,354

Employers were asked in the survey about whether any immigration strategies had become more important to them since the end of free movement. Table 27 summarises the findings. Around 1 in 6 employers indicated that recruiting migrant workers already based in the UK had become more important to them since the end of free movement, and of all the strategies listed, this was the most cited. Figures were highest in hospitality where over one in five employers indicated that this strategy had become more important.

Significant proportions of employers also indicated that they were looking to recruit from pools of migrant workers currently outside the UK – again, this figure was highest amongst hospitality employers. Around one in 7 employers (13%) indicated recruiting Ukrainian refugees on one of the specific government schemes put in place since 2022 had become more important, and one in 10 employers indicated that sponsoring Ukrainian workers to work in the UK had become more important. However sponsoring workers on a visa overall through the points-based skilled immigration system was only cited as becoming more important as an immigration strategy by one in ten employers in the survey.

Table 27: Which of the following immigration strategies have become more important to you since the end of free movement?

Supply chain issues	Social care	Hospitality	Food and Drink processing	Warehousing	All
Recruiting from pools of EU or other workers currently in the UK	18%	21%	13%	15%	18%
Recruiting Ukrainian refugees who are in the UK on one of the Ukrainian schemes	14%	19%	10%	6%	14%
Recruiting from pools of workers currently outside the UK	13%	17%	9%	9%	13%
Target different nationalities compared to prior this date	16%	14%	9%	6%	13%
Sponsoring Ukrainians to come to UK	10%	14%	9%	5%	11%
Sponsoring employees for a work visa	11%	14%	3%	7%	10%
Youth mobility scheme	8%	7%	2%	0%	6%
Intra-Company transfer visa scheme	4%	4%	2%	1%	3%

N=895

Employers that were high users of migrant labour were more likely to report that recruiting from pools of EU workers and other workers in the UK, recruiting from pools of workers outside the UK, and targeting different nationalities had become more important to them since the end of free movement (Table 28). Similar findings have been reported by the CIPD (2023).

Table 28: Which of the following immigration strategies have become more important to you since the end of free movement?

Strategy: % citing as Important	No use of migrant workers	Low use of migrant workers (10% or less of the workforce)	Medium use of migrant workers (More than 10% to 25% of the workforce)	High use of migrant workers (More than 25% of the workforce)	All
Recruiting from pools of EU or other workers currently in the UK	9%	6%	29%	36%	18%
Recruiting Ukrainian refugees who are in the UK on one of the Ukrainian schemes	11%	17%	21%	13%	14%
Recruiting from pools of workers currently outside the UK	6%	15%	23%	33%	13%
Target different nationalities compared to prior this date	9%	16%	14%	27%	13%
Sponsoring Ukrainians to come to UK	9%	13%	18%	9%	11%
Sponsoring employees for a work visa	4%	11%	25%	20%	10%
Youth mobility scheme	5%	3%	10%	6%	6%
Intra-Company transfer visa scheme	2%	3%	4%	3%	3%

N=895

Very few firms in the survey had sponsored visas for non-UK workers, as indicated in Table 29. This percentage was just 5% across the whole sample. When looking at sectors these seem to be ranging between 3 and 7 per cent, with hospitality having the lowest proportion and social care the highest. These proportions are likely to reflect that many roles within the four sectors do not meet the eligibility requirements in terms of pay levels to access workers by a sponsored visa under the new points-based system. On average (the mean figure those companies who reported sponsoring workers on a visa have sponsored two (with a range between 1 and 4). The higher percentage in social care may reflect the fact that a new visa and lower salary thresholds have been introduced for care workers since 2022. Research has shown that the social care sector does drive much demand for overseas workers, with 350,000 Health and Care Visas being issued in 2023 (compared to 118,000 in other sectors) (Migration Observatory, 2024). However, employers may have only started to actively use the scheme only several months into the introduction of the new scheme, meaning that our survey (administered from July 2022-March 2023) may have only captured early use of this visa by care employers.

Table 29: Since 30th June 2016, has your establishment sponsored any visas for non-UK nationals

	Social care	Hospitality	Food and Drink processing	Warehousing	All
Yes	7%	3%	7%	6%	5%

N=1,354

When asked the reasons behind not sponsoring workers on a visa (Table 30), the most prevalent reasons were that vacancies were not eligible for visas and that the vacancies available did not enable worker sponsorship via the new points-based system visa. These were overwhelmingly the two most important reasons in all four sectors. It is also worth noting that a high proportion of employers reported that 'No candidates have required sponsorship'. As our ongoing qualitative interviews are revealing, this latter finding does not necessarily indicate that these candidates were UK nationals. They could rather include migrants with a right to work such as those coming on BNOs visas from Hong Kong, or new refugees from Ukraine, as well as dependants and students with the right to work in the UK (see also CIPD 2023).

Table 30: Why haven't you sponsored workers on visas

Reasons not sponsoring workers on visas	Social care	Hospitality	Food and Drink processing	Warehousing
Vacancies/jobs not eligible for visas	6%	3%	4%	9%
Direct costs too expensive	8%	7%	7%	4%
Bureaucracy/process too burdensome	4%	5%	4%	4%
Have not started the process yet	1%	1%	2%	0%
Concerns about getting it wrong	1%	0%	1%	1%
Unsure about how to recruit overseas	3%	3%	2%	2%
Have tried but without success	1%	1%	1%	1%
Prefer to recruit locally	7%	6%	7%	5%
Small business	3%	2%	3%	3%
Dealt with/by head office/recruitment agency	1%	1%	1%	2%
Have not investigated this option	26%	25%	22%	27%
Have no vacancies/do not recruit	3%	2%	2%	4%
No candidates have required sponsorship	42%	46%	52%	45%

N=1,211

The majority of employers in the sample reported that they had conducted right to work checks – either physically or digitally (Table 31) although 13% used an external organisation to do these checks for them.

Table 31: For any of the workers you have recruited in the last 12 months, have you conducted any right to work checks?

	Yes	No
Our staff undertake right to work checks of physical documents (passports)	65%	35%
Our staff undertake digital right to work checks	32%	68%
Another company undertakes checks for us	13%	87%

N=1,138

A quarter of employers had provided training for their staff around the new migration regime (a figure that was broadly similar across the 4 sectors) (Table 32). The most common forms of training offered by firms were online training (23% of employers) with some evidence of external webinars and workshops (13%). (Table 33). This question was asked based on the assumption that new training for recruiters would facilitate the hiring of migrant workers under the changed rules, following the end of free movement of labour from the EU. The results indicate only partial engagement by firms with the new system and a reluctance to use it to recruit migrant workers.

Table 32: Have staff responsible for recruitment and employment administration required new training around migration and the right to work checks since the end of the free movement in January 2021 and the introduction of the Points Based System?

Sector	Social care	Hospitality	Food and Drink processing	Warehousing	All
Proportion	28%	20%	22%	25%	24%

N=1,354

Table 33: Types of training offered to staff around migration and the new points-based system

	Per cent
Online training	23%
External webinars, workshops or conferences	13%
Q and A drop in sessions	5%

N=462

Communication, representation and dialogue

In this section we consider representation of workers, as well as communication between employers and workers and social dialogue around migration in the sectors sampled.

Union density was exceptionally low to most of the companies sampled in the survey. Looking at Table 34, 86% of the companies did not have any union representation in their firm. Lack of trade union representation was highest in hospitality (95%) and food and drink processing (92%) but was lower in social care (although still high at 69%)

In social care union membership was highest, with approximately one quarter of the companies having between 1%- 50% union density. Warehousing is the only other sector where over ten per cent of firms had union members. The other two sectors demonstrate very low numbers when considering union density.

Table 34: Union density in sampled firms

	Social care	Hospitality	Food and Drink processing	Warehousing	All
0%	69%	95%	92%	86%	86 %
1-10%	13%	3%	3%	6%	6%
11-50%	13%	1%	3%	7%	6%
51-100%	5%	0%	1%	2%	2%

N= 989

When looking at employer representation through membership of trade bodies, figures were also relatively low. Just 13% of firms indicated that they were a member of a trade body or organisation, with the figure being highest (21%) in warehousing.

Table 35: Membership of an employer organisation/trade body

	Social care	Hospitality	Food and Drink processing	Warehousing	All
Yes	13%	8%	15%	21%	13%

N=752

Very few participant companies indicated that they had been consulted by the government, trade bodies or employee representative bodies over issues related to staff shortages or migration policies, as indicated in Table 36. It is interesting, however, that more than one quarter of the companies (29.8%) agreed that membership to a trade body/employer organisation is in fact important when considering discussions on migration. This was most prevalent for firms in the warehousing sector (37%).

Table 36 shows that respondent employers perceived several other factors as important to develop engagement and dialogue on migration related issues. These were: ongoing opportunities to consult with Government over labour shortages (17%) and that their organisation was keen to develop a dialogue on migration with national and local government (16 %). Both suggest that significant proportions of employers are keen to develop and engage with dialogue around migration at a local, regional and national level. Few employers saw time as limiting their involvement and participation in discussions and dialogue around migration. This may imply different things; either that time was adequate for responses or that they perceive that they have not had enough opportunity to respond to consultation, so there was no time spent on responses. This issue is worthy of further research. Our research indicates that most of the existing employer consultation over labour migration reform occurs in ad hoc and fragmented ways. For example, consultation may occur through evidence submission exercises by the Migration Advisory Committee which coincide with the introduction of new policy, or through individual lobbying by employer representatives and trade unions, rather than engaging through permanent structures of social dialogue. There is some evidence that the latter is perceived as a positive innovation by employers, at least in the sectors most critically hit by Brexit.

Table 36: Establishments agreeing with the following statements

Migration policy related statements (% agree)	Social care	Hospitality	Food and Drink processing	Warehousing	All	N
There are ongoing opportunities for us to consult with Government over labour shortages	17%	17%	18%	15%	17%	105
We have had only limited time to respond to consultations over changes to migration regulation	9%	8%	6%	8%	8%	48
My organisation is keen to develop dialogue on migration with national and local government	15%	19%	14%	14%	16%	98
Membership to a trade body/ employer organisation has been important to input into discussions on migration	32%	28%	23%	37%	30%	187

Turning to intra-firm employee communication, individual communication (Table 37) was the most widely used across all 4 sectors surveyed. Most of participant companies (95%) relied on individual communication between managers and workers. This practice was followed by team meetings and communication with all the workforce (69%). This was the main case for social care (84%) followed by food and drink (69%). Very few companies (only 9%) consulted via trade unions or representative groups.

Table 37: Which of the following forms of communication are widely used to communicate with workers in your establishment?

	Social care	Hospitality	Food and Drink processing	Warehousing	All
Individual communication between manager and worker	97%	93%	95%	96%	95%
Group meetings with team or whole workforce	84%	59%	69%	61%	69%
Collective communication through trade unions or other representative groups	12%	8%	6%	10%	9%

N=1,354

Conclusions

This report has provided new evidence on employers' workforce strategies in the post-Brexit period, particularly around employers' use of migrant labour. There is considerable variety and flux in employer approaches and responses, but also some similar challenges and responses.

We provide important new insight into whether, how and why employers are changing their use of migrant workers. We find some very limited evidence of substitution of workers, away from EU workers towards UK workers, or workers from outside the EU, from some employers. However, other employers have not changed their use of EU migrant labour, and overall, our survey highlights considerable flux in labour use strategies, and points to reactive responses rather than strategic responses from many employers towards the use of migrant workers.

The findings point to some flux in employers' strategies towards employing workers on direct and temporary, agency and self-employed contracts in both periods (2016-2019 and post 2019). While larger companies may have the capacity to switch to alternative sourcing strategies such as the use of agency labour (in warehousing and care) to respond to shortages, or to introduce automation (e.g., in food manufacturing) the SMEs making up most of our sample showed patterns of continuity rather than change in the context of regulatory uncertainty and shortages. For many employers, sticking with 'business as usual' in terms of their continuation of workforce strategies that they had used in the pre-Brexit period appears to be their preferred approach. Relatively few have used the immigration system to respond to shortages. This is mostly since wage levels remain low, certainly lower than the required salary threshold (with the exception of care which has been included in the shortage occupation list). This aspect will be further entrenched by the raise in the annual salary threshold in Spring 2024 and the further increase planned for 2025, when dependents will also see restrictions to joining their spouse on a work visas.

Alternative strategies proposed by the government in the post-EU environment, such as upskilling, making work more attractive in low-paid sectors, and automation have all proved challenging and are costly to introduce. In highlighting how employers have responded, our report provides important new evidence on the limits of and contradictions within UK migration policies in terms of their ability to address acute and long-standing labour shortages in the 4 sectors considered.

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The ESRC Labour Mobility in Transition (LIMITS) Project

The Labour Mobility in Transition Project is a research programme funded by the ESRC, from September 2021 to February 2025. It is being conducted by a team of researchers at the Centre for Employment Relations Innovation and Change at Leeds University Business School. The project is investigating the impact of post-Brexit migration for work on the UK, looking at how employers and workers engage with and shape these mobility transitions.

The project investigates the impact of changes to immigration policy and other legislative changes after Brexit, together with the Covid-19 pandemic, on recruitment, retention and workforce planning in four key, but so called 'low-skilled', sectors of UK economy. Specifically, the sectors that the project is looking at are:

1. Social care, which includes: residential nursing care; residential care for people with learning disabilities, mental health and substance abuse; residential care for elderly and disabled; social work activities without accommodation for the elderly and disabled
2. Hospitality, which includes: places to eat and drink; hotels and similar accommodation; event catering activities; public houses and bars
3. Food and drink processing, which includes: the manufacture of machinery for food processing; the processing and preserving of meat, fish, vegetables, fruit, dairy, oils and fat etc. the manufacture/production of cereals, confectionery, drinks etc.
4. Warehousing and transport, which includes: farm product warehousing and storage; refrigerated warehousing and storage, general warehousing and storage; freight transport by road; freight rail transport; freight air transport

All of these sectors have experienced workforce issues and labour and skill shortages and rely on migrant labour as large part of their workforce.

However, because of the 'low skilled' label of these sectors, they have been largely excluded from the post-Brexit immigration routes and unable to recruit from abroad, with some exceptions like the inclusion of care workers on the Shortage Occupation List from March 2022, and temporary visa schemes for butchers, poultry workers and HGV drivers that were introduced in response to labour shortages in 2021 (and have since closed).

The research is generating new in-depth knowledge on changing recruitment practices, (re)training and substitution strategies (including automation) through a national-level survey of employers, twelve workplace-based qualitative studies of management practices and migrant and British workers labour market strategies, expert interviews and participatory sector workshops.

Using a co-production approach to the research we are including the voices of stakeholders in the UK in general and in the Yorkshire and Humber region in particular, by building new evidence through knowledge and practices exchanges among academics and practitioners, that critically informs future migration, employment and skills and social policies in post-Brexit UK.

Our wider objective is to elucidate how social dialogue between industry, statutory and civil society actors is developing and influencing employers' strategies and workers' experiences with a view to identifying opportunities for new jobs creation towards a socially equitable and environmentally sustainable recovery.

ESRC LIMITS Project: <https://business.leeds.ac.uk/research-ceric/dir-record/research-projects/1870/labour-mobility-in-transition-a-multi-actor-study-of-the-re-regulation-of-migrant-work-in-low-skilled-sectors-limits>

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