From low-skilled to good work: a joint approach to migration policy

Centre for Employment Relations, Innovation and Change (CERIC) Leeds University Business School

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This report identifies key challenges and policy recommendations for developing a joint approach on migration for work in the UK. The recommendations are made based on the findings of a four year research project on changing labour market and migration since Brexit across low-paid sectors.

Content:

- Context of UK migration policy change and labour challenges post Brexit
- Examples of initiatives to respond to labour and skills shortages in key sectors affected: hospitality, social care, food manufacturing and logistics.

The evidence base for the findings consists of:

- A UK wide Survey of 1,651 employers on their workforce strategies post Brexit (July 2022-March 2023);
- 150 interviews with key informants (workers, employers, agencies, industry representatives, local and national government, trade unions, migrant advocacy groups) across the UK;
- 7 workplace case studies in the Yorkshire and Humber region;
- 4 stakeholder workshops. The qualitative research was conducted between October 2021 and January 2025.

The report is based on the UKRI funded research. Labour Mobility in Transition: a multi-actor study of the re-regulation of migrant work in 'low-skilled' sectors (2021-25). An executive summary is also available at tinyurl.com/LabourMobility

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1. Introduction

The UK has been at the crossroads of unprecedented economic and social shocks as well as regulatory change since Brexit. The UK's post-Brexit points-based migration system (PBS), introduced in January 2021, promised to attract high-skilled workers, and deliver a 'high wage, high skill, high productivity' economy (Home Office 2020). However, productivity has stagnated and labour shortages have persisted, or for some sectors worsened, since the end of free movement of labour from the EU. Further changes to the skill-based migration system have introduced higher salary thresholds and limited access to worker visas exacerbating shortages and limiting growth (National Audit Office 2025).

In this policy report, we present key data from a four-year study funded by the ESRC called Labour Mobility in Transition (LiMITs) at Leeds University Business School, exploring the effects of the post-Brexit migration system. The research focused on four sectors of the UK economy that, while relying historically on migration, are also known for relatively poor working conditions, low pay, insecure employment and irregular hours. These sectors are Transport and Storage (T&S), Food and Drinks Manufacturing (FDM), Hospitality, and Social Care. We set out how employers and workers have navigated the introduction of the new migration system and the consequent changes in the labour market, compounded by the COVID-19 pandemic and subsequent cost of living crisis. We explore what a more co-ordinated approach to managing migration and the labour market may entail in light of existing initiatives across the statutory and private sector, and ongoing challenges faced. Our findings seek to inform government policy and help foster sectoral-level, multi-agency approaches to migration dialogue and co-ordination including national government, combined and local authorities, colleges, trade unions and migrant support charities.

Migration policy and labour shortages after Brexit and COVID-19

In May 2025, a new White Paper on 'Restoring Control over the Immigration System' (HM Government 2025) set out the government's aim to reduce net migration by the end of the current Parliament by narrowing further the occupations on the Shortage Occupation List, reducing lower-skilled migration and closing the social care visa route. Central to this White Paper is a call for government departments and key bodies on Skills, Industrial Strategy, Work and Pensions, alongside the Migration Advisory Committee to work together in a co-ordinated way at a sectoral level, to make informed evidence-based decisions on labour market policy, including on migration. This interest in a joint approach to migration, involving multiple government departments, and other stakeholders such as trade unions, employers and migrant support bodies, has been called for elsewhere too (Savur 2025).

Despite these calls, there remains a lack of systematic evidence on how the post-Brexit immigration system has impacted sectors of the economy that have historically relied on migrant workers who are no longer eligible to work in the UK. There also remains a lack of knowledge about what a joint approach to migration policy might mean in practice. Which stakeholders might play a role, how could co-ordination and dialogue work, and what aspects of migration, skills, and employment within sectors should be considered?

The LiMITs project - researching migration during a period of flux

The Labour Mobility in Transition Project is an ESRC-funded research project at Leeds University Business School which has run between September 2021 and June 2025. The project has investigated the impact of the post-Brexit migration regime and COVID-19 on employers' workforce strategies, their experience of labour shortages and their dialogue with stakeholders in four sectors that have historically employed a higher proportion of migrant workers: Transport and Storage (T&S), Food and Drink Manufacturing (FDM), Hospitality, and Social Care[1].

The multi-sectoral perspective (Alberti and Cutter 2022) examines changes in labour market dynamics covering the period from October 2021 (early post-Brexit period) through to January 2025, the effects of lockdowns during the COVID-19 pandemic and the subsequent period of recovery in the face of rising costs and continued uncertainty. Throughout the research, we looked to disentangle the effects of COVID-19 and Brexit, and the multi-faceted, and overlapping impacts of these significant shocks. The study captures sector level data on how employers have responded to the changes in labour supply and examined workplace impacts on employment strategies and workers, including nuanced outcomes, such as the mobility of workers between sectors.

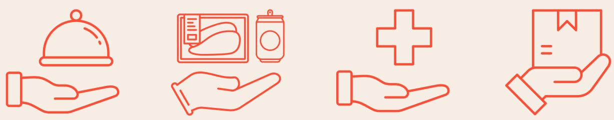
The research has comprised:

- A new nationally representative survey of 1,651 employers across Hospitality, Social Care, T&S and FDM, conducted in July 2022-March 2023 (Forde et al 2024).
- 150 interviews conducted between 2022 and 2024 with employers, trade unions, migrant support groups, sector level stakeholders and migrant workers, and workplace case studies that included interviews with business leaders, frontline workers and supervisors.
- 4 stakeholder workshops, each involving discussion and dialogue around migration policy with stakeholders. These were: T&S and FDM (June 2024); Social Care (July 2024); Hospitality (October 2024), and the Local government and Migrant Advocacy sectors (January 2025)

Report Structure

The report is structured as follows. First, in Section 2 we set out the labour market and migration context for our findings. The impact on employers and their responses are reported in Section 3. Section 4 focuses on sector level impact and responses to ongoing labour shortage and skills issues. Section 5 presents examples of multi-agency initiatives to address worker shortages and to reach groups that may have barriers to accessing the labour market. Section 6 identifies ongoing challenges to improve work quality and jobs attractiveness. Section 7 presents our conclusions and Section 8 our core recommendations and Section 9 sets out further reading.

The project has investigated four sectors that have historically employed a higher proportion of migrant workers: Hospitality, Food and Drinks Manufacturing (FDM), Social Care and Transport and Storage (T&S).



1 The four sectors have been selected and defined based on the UK SIC 2007 (Standard Industrial Classification). The sectoral Divisions are: Residential and Social Care (87 and 88, excluding Childcare and nurseries 88.91) Hospitality (55 and 56), Food and Drink Processing (10 and 11) and Warehousing, Support Activities for Transportation and Freight Transport (52, and 49.20 / 49.41). For a detailed definition of the sectors used in our survey see Forde et al. (2024: 40).

2. Context: migration flows and rising employer vacancies

Changing migration flows

It is difficult to provide definitive figures on migration flows since COVID-19 and the end of freedom of movement of workers to the UK. Key data series on migration were paused during lockdown in 2020 and 2021 (ONS 2022) and estimates of migration flows are currently drawn from long-standing measures[2] such as the International Passenger Survey,[3] alongside some new experimental migration data indicators.

Available data show that whilst net migration to the UK between 2000 and 2019 was relatively steady at between 200,000 and 300,000 per year (Fernandez-Reino and Brindle 2024) since 2020, there have been significant changes in the share of EU and non-EU migration. In 2020, net migration fell to nearly zero (Sumption et al. 2024) as the effects of COVID-19 lockdowns, and restrictions on movement were felt. From 2021-2023, net migration increased each year, rising to 300,000 in 2021, 500,000 in 2022 and 860,000 in 2023 (ONS 2024a).

Increases in net migration from 2021-2023 had been driven largely by non-EU immigration, particularly international students, workers on Skilled Worker Visas in the care sector and dependants of both groups. However, there was a sharp decrease in immigration from non-EU nationals from both of these groups (ONS 2025a) whereby in 2024 net migration fell to 431,000.

EU net migration in particular has fallen in recent years. In each of the years from 2022 to 2024, EU net migration has been negative (Sumption et al. 2024). The most recent analysis of data, for the year ending December 2024 indicates an EU net migration level of –96,000 (ONS 2025a). One analysis, comparing migration trends since Brexit shows that new migrants from outside the EU have not simply replaced those EU workers who have left and that manufacturing, logistics, administration (including cleaning and security) and hospitality sectors were most heavily affected by a loss of EU workers (Portes and Springford 2023). The issuing of visas has been heavily concentrated in specific sectors, with 44 per cent of main applicant Skilled Worker visas (146,000) being in the health and Social Care sector in 2023 (UK Government 2024b).

These recent changes in migration flows have had some impact on the overall composition of employment in the UK since the pandemic (Alberti et al. 2020). In 2024, migrant workers made up 21% of the UK employed workforce, a figure which has risen from 17% in Summer 2016 just before the Brexit referendum, and 19% in Spring 2020, just before the COVID-19 pandemic (Fernandez-Reino and Brindle 2024). The same source reports that the share of non-EU workers in employment has risen from 10% in 2016, to 11% in spring 2020 and 14% in 2024, whilst the share of EU workers in employment has remained at 7% in Summer 2016 and Spring 2024. The three sectors where migrants make up the largest proportion of the workforce are Transport and Storage, Hospitality, and IT. In each of these sectors, more than a quarter (27%) of the employed workforce are migrant workers. The share of migrant workers in employment is also high

2 For further information, see https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/internationalmigration

3 The International Passenger Survey has been used to collect information about passengers entering and leaving the UK since 1961. For further information see https://www.ons.gov.uk/surveys/informationforhouseholdsandindividuals/householdandindividualsurveys/internationalpassengersurvey

in the Health and Social Care sector, at 22%, whilst in manufacturing, the proportion is 19%.

Since Brexit there have been additional external events and new migration routes that have contributed to a shakeup of the migrant workforce profile in the UK. Among the biggest demographic groups to enter the UK after Brexit were Ukrainian refugees and migrants from Hong Kong coming to the UK as British Nationals Overseas (BNOs). We found both groups present in higher numbers across the 4 sectors we researched. Both Ukrainian refugees and BNOs have immediate right to work. Refugees from both Ukraine and Hong Kong tend to be highly educated: data from the OECD (2023) indicate that 71% of Ukrainian refugees have a tertiary level qualification. Despite this, our research shows that both Ukrainian and BNO groups, as well as EU and non-EU migrants, have experienced barriers to entering the labour market and finding employment that would match their qualifications. Key issues preventing them from entering skilled employment included the need to speak specialised English and to get their qualifications recognised and accredited in the UK.

Vacancies and worker shortages

The combination of Brexit and COVID-19 have resulted in historically high levels of vacancies in sectors in the UK that have relied on the use of low paid and flexible migrant workers. Figure 1, compiled from the ONS vacancy and job data series (ONS 2025b) below charts vacancy levels in T&S, FDM, Hospitality and Social care over the last 25 years. Whilst each sector has its own distinct patterns of vacancies, there are some common trends.

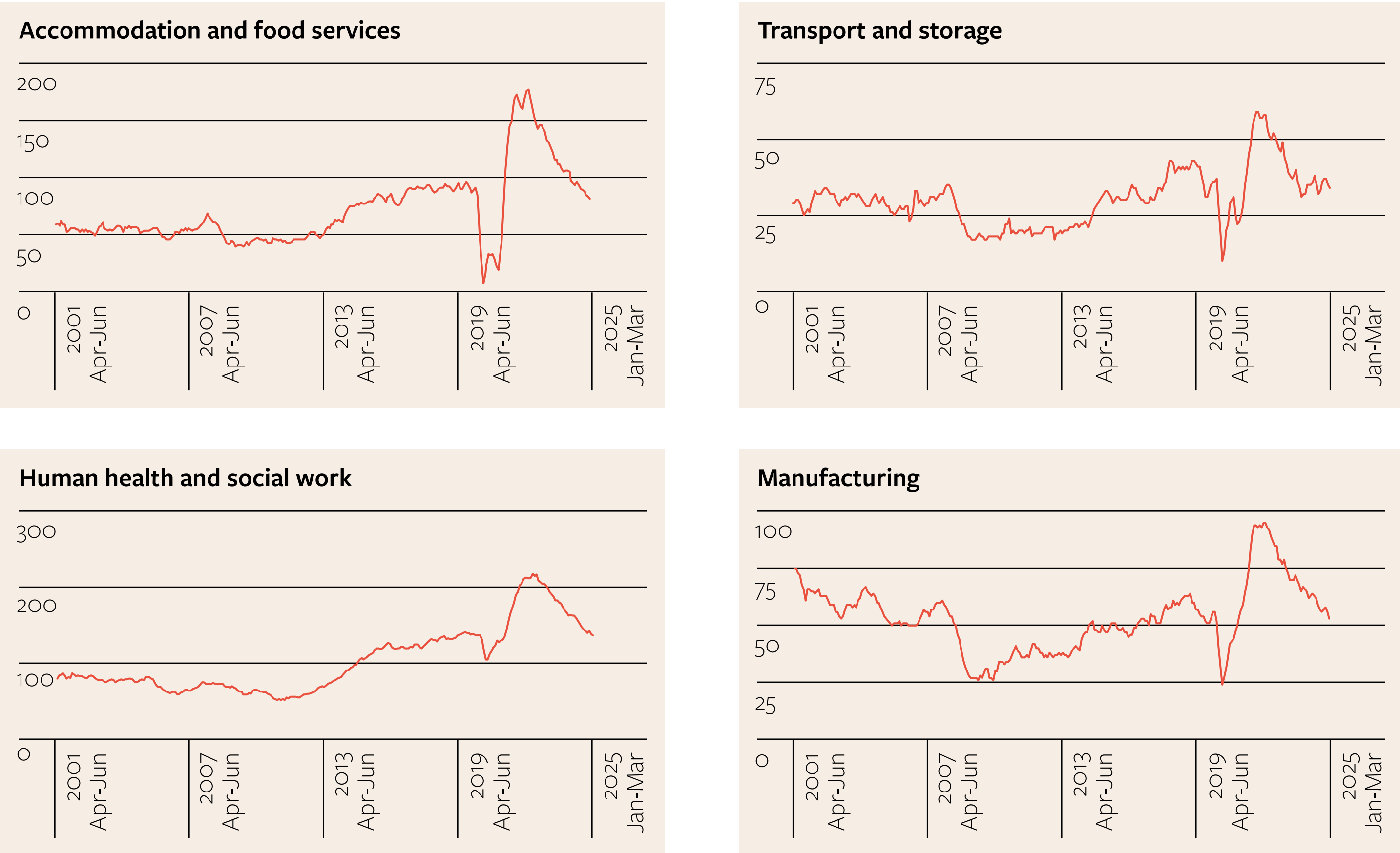
Looking across the 2000-2019 period, there are notable falls in vacancies across all 4 sectors during the global financial crisis of 2008-2010 and rises in vacancies during periods of economic recovery between 2015-2018. Since Brexit and COVID-19, there have been more rapid fluctuations in vacancy levels across all sectors.

The effects of Brexit can be seen in rising vacancies in all four sectors from 2018.

The immediate impact of COVID-19, with a lockdown in many businesses can be clearly seen with a sharp fall in vacancies in Spring 2020 (less pronounced in Social Care where many employers continued to operate throughout the pandemic). Whilst vacancy levels have fallen somewhat over 2023 and 2024, they remain high compared to historical levels[4].

4 For more information see the ONS analysis available at https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/bulletins/jobsandvacanciesintheuk/april2025

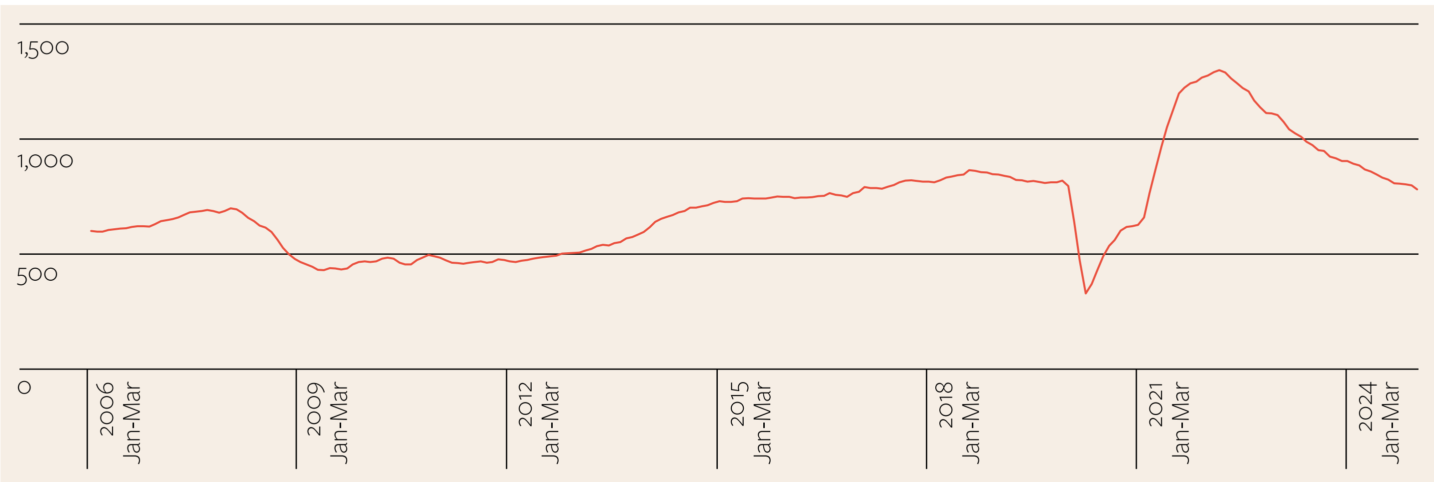
Figure 1: Vacancy levels in hospitality, transport and storage, manufacturing and social care
(Job vacancies in thousands)



Source: Vacancy Survey from Office of National Statistics (ONS). We use Manufacturing rather than FDM as specific vacancy data for this sub-sector are lacking.

The trends shown in Figure 1 resonate with findings from our survey of 1,651 employers in Hospitality, Social Care, Food and Drink manufacturing and Transport and Storage. Just under half (48%) had current vacancies, and of these firms, three-quarters (73%) had hard-to-fill vacancies. Hard-to-fill vacancies were particularly prominent amongst hospitality employers (85% of those with vacancies reporting they were hard to fill) but were also high in the other sectors (73% warehousing, 70% food and drink processing and 66% social care).

Figure 2. Number of vacancies in the UK
(Job vacancies in thousands, seasonally adjusted)



Source: Vacancy Survey from Office of National Statistics (ONS). .

Figure 2 illustrates the estimated number of job vacancies across the UK. In the period from January to March 2025, the total number of vacancies declined to 781,000, which represents a decrease of 15,000 vacancies (or 1.8%) compared to the pre-pandemic level recorded between January and March 2020. While this recent trend indicates that the labour market is less tight than during the period of vacancies peaking (at approximately 1,300,000 between February-April 2022), they remain higher than pre-pandemic levels. Comparing Figure 1 and Figure 2 we see how the four sectors in our study mirror the broader UK vacancy trends to a large extent, displaying a steep decline during March to May 2020, followed by a significant rebound in February to April 2022.

However, sector-specific variations are evident. Compared to vacancies across all sectors in the UK, the decline in vacancies during the pandemic was particularly pronounced in the accommodation and food services sector, reflecting its acute vulnerability to lockdown measures and social distancing restrictions. In contrast, the health and social care sector experienced a more moderate decline, likely due to sustained demand during the public health crisis. The transport and storage and manufacturing sectors followed a pattern more closely aligned with the overall national trend, showing similar levels of contraction and subsequent recovery.

These differences underscore the uneven impact of the pandemic and Brexit on labour demand across sectors and point to varying degrees of resilience and recovery dynamics within the UK labour market.

In 2025, whilst employer hiring activities have slowed somewhat over the last 12 months, recruiting and retaining staff remains a major challenge for employers. The most recent CIPD Labour Market Outlook survey of employers in Spring 2025 (CIPD 2025) reports that more than half of employers in care, social work and other healthcare activities (55%), 40% in transport and storage, 43% in manufacturing and 30% in hospitality have reported hard-to-fill vacancies.

3. Employer responses to labour shortages

In this dynamic context of persistently high vacancies and changing migration flows, how did employers respond to labour and skills shortages and how did they use the new migration system across the four sectors?

Navigating the new immigration system

Our qualitative evidence shows that all the four sectors studied were impacted by the end of free EU movement post-Brexit and experienced significant labour shortages. Under the new points-based immigration system ('Skilled Worker Visa'- see Home Office 2020), most employers in hospitality, FDM and T&S have been de facto excluded from recruiting internationally as most job roles in these sectors do not meet salary and skills thresholds to be eligible for Skilled Worker Visa. The exception is Social Care where salary requirements were relaxed in 2022. Yet, care employers in our survey and case studies reported barriers in accessing and using the Skilled Worker Visa, including costs and the length of time needed to set up sponsorship and for visa applications to be processed. This limited the use of the Skilled Worker Visa. Across all employers in our survey only 5% of employers had used it (7% in Social Care, 7% in FDM, 6% in T&S, and 3% in Hospitality). This proportion may have increased since the time of our survey in 2022-2023, particularly in the care sector given the relaxation of salary requirements. Resonating with findings from other recent research (CIPD 2025) our survey showed that Small and Medium Enterprises (SMEs) experience particular barriers in utilising the migration system to hire workers from abroad because of the substantive resources and knowledge needed to sponsor migrants on visas.

With constraints on their ability to use the new migration system to fill vacancies, how did employers seek to address worker shortages? Our survey highlighted 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 Figure 3), the most cited strategies here were to increase pay (53%), and to increase opportunities to work flexibly (43%) and improve training (41%). There were some slight variations of the intensity of response across sectors, but these three responses were the main strategies across the sample.

Searching for new sources of labour

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 sought to employ more UK workers (31%), and one in 7 (15%) was looking to employ more migrant workers. Where firms were looking to employ more migrant workers, our qualitative evidence suggests that these were primarily: dependants of migrant workers on the Skilled Worker Visas; workers who moved sectors during COVID-19; and international students.
Despite these notable shifts, many employers were adopting a "business as usual" approach in the face of regulatory uncertainty and changes to the migration system, with firms simply looking to recruit more workers through the established routes. Notable within this second set of responses, was that many firms reported an increased in the use employment agencies (32% of firms). In our qualitative research some recruitment agency managers highlighted the hurdles encountered in gaining compliance certification in the new migration system. Global recruitment networks (based on digital platforms) appear to have become more important since Brexit, involving new partnerships between employers and agencies in East Asia and Africa.

Figure 3: Which strategies have you used to try and address hard-to-fill vacancies?
(And which have been the most successful – highlighted within the table)

Strategy	Social Care	Hospitality	Food and drink processing	Ware-housing	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%
Recruitment campaigns to diversify workforce	29%	21%	25%	20%	24%
Adjustment towards employing migrant workers	20%	12%	15%	13%	15%
More automation	11%	13%	28%	11%	14%
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%
Signing up bonuses	1%	0%	0.%	1%	1%

Source: Limits Survey of Employers (Forde et al. 2024)

A more common practice was turning to local recruitment agencies that were able to tap into new groups, including migrant workers, with managers highlighting more broadly the role of agencies in providing increased flexibility:

“Generally speaking there was a pivot to agency because they were more able, in an agile way, to source more flexible labour.”
T&S case study 2, HR officer

The use of migrant labour tended to be associated with outsourcing, especially in T&S where there are often complex labour supply chains. Senior management also remained quite vague about the (legal) migration status of their workforces, admitting, on some occasions that cases of modern slavery were feared especially in relation to the use of third-party agencies (fieldnotes, workshop with stakeholders from T&S and FDM sectors). Trade unions interviewed for our research reported that there was less oversight and control over employment practices and conditions, particularly beyond depots and delivery centres directly managed by the main companies.

The other side of increasing flexibility to attract a more diverse pool of workers, was to provide flexible arrangement options, e.g. to those who preferred flexible shifts to better juggle work, care and family needs (Forde et al. 2024).

Limited turn to automation

Automation has been put forward as a means through which UK employers might reduce 'reliance on the UK's immigration system' to meet labour needs (HM Government 2018). Our survey evidence suggests that few employers (1 in 7, or 14%) used this as a strategy to address labour shortages. Where technologies and digitalisation were used in relation to labour issues, this was not simply to substitute workers, but new technologies were also used to improve inclusion, to onboard staff and upskill the existing workforce.

The use of new technology and automation was unevenly distributed across the four sectors, with FDM and T&S increasing their use of new technologies much faster and at a bigger scale than hospitality and adult social care, where human labour is not easily substituted with technology.

The strategies used by employers to address shortages or improve retention depended on several factors, including the nature of the work in the sector, local labour availability and the type of skills needed.

The following section summarises how employers in specific sectors report their experiences around the labour supply 'shocks' associated with Brexit and COVID-19, and the key factors that shaped the responses noted above.

4. Sector level impacts and responses

Hospitality

Hospitality was severely impacted by both Brexit and the COVID-19 pandemic. It recovered relatively quickly soon after the re-opening while small business faced new challenges with the cost of living, high turnover and labour shortages (UK Hospitality 2021). It is a diverse sector with many SMEs, hotels and resorts, and venues in rural as well as urban locations and is strongly affected by seasonal fluctuations in demand. Before Brexit, sections of hospitality critically relied on EU workers, particularly in rural areas, like the Scottish Highlands, with insufficient supply of local labour (Sumption et al. 2022). The end of the freedom of movement of workers cut off access to a lot of mobile EU labour, with only chefs and some management positions in hospitality being eligible for Skilled Worker visas.

Some firms did increase the use of international agencies (e.g. in South Africa and the Philippines) to recruit specific occupations such as chefs, and some sought to recruit more EU workers with (pre-)settled status. Local recruitment agencies were also used, for example in our rural case study, to find workers for food service and housekeeping, but especially for chefs who tend to prefer agency work and independence from employers. Hospitality firms also revealed a greater reliance on student labour (often on a seasonal basis), and greater hiring of workers in their late 50s and early-to-mid-60s (including those retired) usually in part-time roles. One of the main responses of hospitality employers has been to increase pay to attract more workers. Upgrades in the National Living Wage have helped to ease recruitment pressures – a restaurant manager (Hospitality case study 1) suggested it increased by 20%. While recognising that low pay has been a long-term issue, employers were concerned about costs to their business:

"But the wages can't just keep going and going and going (up). It needs to be a small increase, to a deal with the cost-of-living crisis and the gas and electric, so people can afford to live and take a little bit more to balance that out. It is about balancing that and trying to make sure wages don't go through the roof, because businesses still need to operate."
Hospitality case study 1, general hotel manager

Due to uncertainties and sharp increases in costs of staff, raw materials and energy, many employers (especially SMEs) reduced staffing levels, leading to work intensification and increased workload for existing employees.

There was some evidence of hospitality employers engaging with local educational institutions and Job Centres to address workforce needs, and in some cases the use of apprenticeships, for example, in food preparation. However, with persistently high vacancies and work intensification there was limited time for training and upskilling initiatives. Furthermore, some managers indicated that fears of poaching staff by other firms, along with entrenched high levels of labour turnover in the sector had limited their willingness to invest in training or apprenticeships.

In Hospitality, digitalisation has mainly focused on the customer-facing side, but with varied effects. In the rural case study, HR manager claimed that technology was not a credible alternative in replacing human labour. However, in our second Hospitality case (a cafe chain) the attitude towards technology was more optimistic. Rather than displacing workers, management reported greater flexibility in scheduling and workers to be moved into alternative areas and activities:

"We have technology that allows you to move shifts and say, 'can anyone cover me for the shift'. And 'I wanna do that one' or 'I can do a couple of extra hours going' or whatever."
Hospitality case study 2, manager

Food and Drink Manufacturing (FDM)

The FDM sector was heavily affected by labour shortages, with stakeholders noting worker burnout during COVID-19 as sites continued production and many workers left the sector. Some of these shortages had already emerged prior to COVID-19, following the EU referendum, with a pronounced decrease in EU labour availability. FDM employers were less likely to use non-standard employment contracts, but as with hospitality employers, more likely to report a net increase in the use of employment agencies to fill vacancies post-Brexit (Forde et al. 2024).

In the meat and poultry sectors, employers have been able to recruit from abroad to address their workforce needs, either via the Skilled Worker Visa route (butchers) or via temporary visa schemes (poultry workers). However, some of these schemes were very short lived. 5,500 new poultry worker visas and 800 pork butcher visas were awarded in October 2021 but these visa schemes closed in December the same year (UK Government 2021). The poultry workers temporary visa scheme was renewed between 2022 and 2024 and made 2000 visas available to address urgent workforce needs.

In our case study in FDM (as well as T&S), a new source of workers was found via spouses/partners of migrants on Care Worker Visas, whereby some employers noted increasing diversity of their workforce. This mirrors the employer survey where employers in the FDM sector were second only to the care sector to report an increase in recruiting workers from outside the EU. In our FDM case organisation, shortages post-referendum and post-COVID included semi-skilled and skilled operatives, food technologists and engineers. In response, the firm had developed an engineering apprenticeship scheme with a specialist college in the region. However, retention and shortages of other staff groups continued to be an issue.

A key response noted in our survey was that employers had increased pay and in some cases reward policies, including 'joining bonuses.' Although, in the case study organisation this response was felt to be very limited: the company had significantly increased its business with supermarket retailers during COVID-19 (as its core hospitality market collapsed) and had little scope to pass on costs.

Across our survey, just over a quarter (28%) of FDM employers had turned to automation as a response to labour shortages. FDM employers had accelerated the implementation of new technologies and automation to reduce reliance on human labour, although this had mixed results. The case organisation had implemented a significant programme of automation that required the re- and up-skilling of workers.

"We need more people and skills in the QA[5] department, because if dates or bagging is wrong, it gets sent back and you get fined off [the retailers]... the robot's pack them now, when the hand packers were doing them they'd shout 'your bag's open', a robot won't do that. So if you've not got your wits about you, it's gone."
FDM case study, packing shift supervisor

The multiple pressures from COVID-19, the cost-of-living crisis and Brexit created ongoing challenges which had led to work intensification having a negative impact on workplace culture and morale.

Social Care Sector

The social care sector has had long-term issues with worker shortages and retention (ReWAGE 2024b) and has been heavily reliant on migrant labour. Brexit and the pandemic have exacerbated these issues. Care providers have historically struggled to recruit domestic workforce and to attract young people to work in the sector and have relied on migrants to fill their workforce needs.

"(They keep) talking about homegrown staff, and it's not there. It's never been there, and it's not going to increase. (...) So you need people coming in that are still of that mind-set. But yeah, we've never really shifted in the amount of people who come that are British or English."
Social care case study 2, manager

Prior to the introduction of the Care Worker Visa in 2022, only senior care workers were eligible for the Skilled Worker visa. Some social care providers did recruit migrant workers via this route, but our qualitative evidence suggests that led to workforce divisions and discontent, with staff recruited into senior care worker roles and being paid more despite having less experience than existing staff.

Since the introduction of the Care Worker Visa, there has been a significant increase in recruitment via this route (ONS 2025a). Some of the care providers that we interviewed have successfully used this route to recruit workers, either from abroad or workers who hold a visa and are already in the UK. Interviews also revealed that some employers had reduced their reliance on agencies by employing migrant staff directly, as a means of reducing labour costs. And yet, since the introduction of the scheme there has also been an increase in reports of exploitation including evidence of migrant care workers being charged exorbitant recruitment fees (Unseen 2023), also reported by our research participants.

Care providers in our study also reported recruiting international students, who are able to work twenty hours per week under the terms of their visa. Migrants on Care Worker Visas are also able to work additional twenty hours for another employer, and some care

5 Quality assurance.

providers have used this option to recruit migrants already working in the care sector for another employer, without having to apply for a sponsorship licence.

Since social care is mostly based on human interaction, technology had a substitutive role only for some specific tasks, such as the use of digital devices to remind clients to take medication (Care case study 1). Digitalisation was used to help organise work schedules, evidencing care needs, and closer of monitoring staff: domiciliary care staff had to 'sign in' via a QR code when they arrive at a client's house, complete a checklist of tasks or write a summary and then 'sign out' when they leave a client.

Due to the funding structure of the sector, pay levels in care firms are typically benchmarked at the minimum wage, contributing to high levels of worker turnover, and work intensification for those remaining in the sector.

Transport and Storage (T&S)

The sector has historically experienced relatively high use of recruitment agencies to provide flexible labour to deal with peaks and troughs in demand. More recently, some employers have moved to direct employment to try and minimise the costs of using agencies and to improve retention in the face of high levels of staff turnover.

Our interviews revealed that COVID-19 had the most impact on employment in the sector, with a sudden, large shift towards online shopping. One of our case study firms (a large warehousing and delivery firm) reported that while during the lockdown they were able to hire workers placed on furlough by other employers, it was when COVID-19 restrictions ended that they saw the biggest impact in terms of hard to fill vacancies. And yet, also Brexit had an overlapping impact, with people from Eastern Europe having left the UK exactly when additional workers were needed:

"We've got a sort of double problem, volumes are up massively, we need more staff and we're finding it incredibly more difficult each year to recruit and retain those staff."

T&S case study 2, head of infrastructure

Other interviews, specifically with couriers in our T&S case study 2, highlighted how the intensification of work in the sector during the pandemic, due to increased demand, and labour shortages resulted in higher turnover.

Ad hoc visa schemes to help deal with shortages during the pandemic were used by some employers. 4,700 HGV driver visas were made available after lobbying in October 2021 (Transport Operator 2021), but all temporary visas expired in February 2022. Interviewees perceived that these schemes were fragmented and reactive, and unsuitable for addressing long-standing shortages in the sector and for a sustainable workforce planning. As with some of the other sectors we found evidence of increased hiring of non-UK workers with limited right to work (e.g. international students and dependants).

Sector attractiveness was seen as a key barrier to overcoming labour shortages. An employer association insisted that changing the perception about jobs and careers in the sector, and including logistics in school curricula is paramount. Some employers acknowledged that jobs in the sector remained unattractive, turnover was high, and managing expectations of applicants at the recruitment stage was essential:

"The other key thing for us is helping people to see what they can expect before they join, because a big piece we had in our churn was you turn up on day one and go, 'oh my God, it's hard work, it's cold, it's manual.' So, help people to understand it before they join."

T&S case study 2, HR manager

Among the other unattractive factors of work in this sector there is the lack of employment security. The T&S sector has seen a high use of self-employment and worker status (rather than direct employment) While some employers have experimented with upgrading social protections for those on self-employed contracts, bogus self-employment especially for couriers continues to be prevalent.

In one of our T&S case studies, management decided to change their employment model increasing the ratio of directly employed to agency workers, in part to attract new candidates and expand the core workforce. Management highlighted the benefits of providing more security for workers and in improving productivity.

Regarding the use of digitalisation and automation employers in the T&S sector (together with FDM) increased the use of technology at a faster and bigger scale than the other sectors, but small businesses were unable to adopt new technologies at a same rate as larger companies, due to costs. Interestingly, in the large logistics company case study, technology was being used to lower barriers to diversity. The company considered providing online training for the newly recruited staff in the language of origin of the workers. This was seen as a means of smoothing onboarding. The impact of the use of new technologies on work quality and skills remains contested, with other research in the warehousing sector (Winton et al. 2024) showing uneven opportunities for upskilling and wage increase (according to job roles and firms' technological access).

5. Examples of multi-agency initiatives

The previous section provided a summary of specific sector workforce challenges and employer responses post-Brexit. This section provides examples of initiatives undertaken by industry stakeholders in collaboration with statutory bodies, local government and educational institutions. These initiatives variously seek to tackle shortages and address the effects or the unintended consequences of new migration regulation, and to improve conditions to attract workers to these sectors. We show three examples here that provide valuable illustrations of the ways that different stakeholders have come together to try to address sector level labour challenges.

Essential skill training in FDM

The FDM sector Careers Passport initiative illustrates how sector training experts have worked with employers, schools, the prison service and local authorities to develop tools that raise awareness of opportunities in the sector and prepare new entrants by accrediting them with specialist knowledge to be 'work ready'. Even in jobs that might be usually termed low-skilled, increasing regulatory requirements (for example on food safety) require sector-specific knowledge. Initially developed with support from government, the initiative is now self-supporting under the stewardship of the sector's National Skills Academy.

Food and drink sector – Food and Drink Careers Passport case study

The food and drink sector has been experiencing shortages of skilled workers, and seasonal fluctuation in demand for certain products results in fluctuations in workforce needs. At the same time, the sector needs to comply with a large number of regulations around food and health safety. Employers need workers with essential training around these topics. The Food and Drinks Careers Passport is managed by the National Skills Academy for Food and Drinks (NSAFD) and was developed jointly with the Food and Drink Federation (FDF) through the Kickstart programme. The passport is based on online learning and enables workers to show that they have some of the essential skills required for work in food and drink manufacturing. Holding the F&D Careers Passport can speed up the onboarding process because it demonstrates that new employees have awareness of the sector and essential skills training. The passport also increases engagement by enhancing awareness of careers in the sector with a specific, but not exclusive focus on reaching young people, and other demographic groups that are further from labour market entry. Work with the Prison Service includes training as part of rehabilitation programmes, to help prisoners be job ready on release and to ensure compliance in prison kitchens. NSAFD have also worked with councils as part of their programmes for care leavers to support employment. The passport has helped disadvantaged young people get apprenticeships, with some employers offer a guaranteed interview (for entry level roles) for people with the passport. In other cases, young people have been able to obtain the F&D Careers Passport as part of their work placements, further aiding their readiness to enter employment.

Supporting 'non-traditional' workers into employment

Supported internships have been developed as part of the government's strategy to increase the capacity of young people with disabilities and special needs to participate in the workforce. Figures show that people with disabilities have lower employment rate than people without disabilities (Powell 2024) and young people with disabilities or special needs experience additional barriers to employment. We have selected supported internships as an example of an (indirect) response to shortages post-Brexit and as a government initiative that provides an illustration of the collaboration and intensive support model that engage those that may experience additional barriers to the labour market.

Supported internships

Offer a structured work-based programme to 16–24-year-olds with special educational needs and disabilities (SEND) who have an education, health and care (EHC) plan. The internships are facilitated by a specialised job-coach and they are developed and delivered jointly by an educational provider (typically a college) and an employer, and last between 6-12 months. Supported interns are enrolled onto a course of study by their learning provider, but they spent most of their learning time (around 70%) in a workplace, developing the skills needed for employment. As well as benefiting the interns, supported internship have the potential to benefit employers by offering targeted training and skill development and increased workforce diversity. In Leeds, several educational providers offer supported internships, including

Lighthouse Futures Trust, Leeds City College and Pinc College, with more than 100 students taking the opportunity to enrol onto the internship in partnership with employers from a wide range of sectors, including hospitality, retail, manufacturing, healthcare, warehousing and others. To make supported internships successful requires that employers to work closely with educational providers and with the DWP, as well as with the young person and/or parents (where appropriate). Many interns complete one or two years of a pre-internship programme to develop their skills and experience. The education provider then works closely with employers to create placements that suit their interns. Interns attend an 'Inspiration Day' event where they meet employers and find out more. Employers and interns are also able to access the support of 'Access to Work' from the DWP, which can fund travel and reasonable adjustments in the workplace. Despite the initiative having a high success rate in Leeds, with around 80% of supported interns in Leeds1 gaining paid employment after completing their internship, across the UK the success rate is lower with 47% of interns having a job six months after their internship, indicating that further and longer term support may be needed.

Jobs and skills matching, and vetting for 'good work'

Our research with migrant care workers highlighted that migrants who have lost their sponsoring employer experience various barriers to finding a new sponsor, with the low number of care providers able to offer sponsorship and guarantee a full-time employment being a key factor, alongside poor working conditions. Other key factors include the need to obtain a UK driving licence within 12 months after arriving to the UK, which for many migrant workers is not possible due to cost and the time required. The International Hub case shows the collaborative nature of the work with employers, government agencies, councils and NGOs to support migrant care workers, Support includes providing additional training but also matching displaced workers with new sponsoring employers while seeking to minimise risk of repeat loss of employment and sponsorship.

The International Recruitment Hub for Displaced Migrant Workers

Created to provide a route to match employers in the care sector with sponsored workers in need of a new employer sponsorship. The Yorkshire and Humber Regional International Recruitment Hub (YHRIRH) aims to match displaced migrant workers with new sustainable sponsored work in the care sector and provides information and training resource to care providers but also resources, employability and pastoral support to workers who are interested in applying for eligible vacancies in social care. Employers who did not yet hold a sponsorship licence also received bursaries to support costs. To ensure that workers are not mistreated in their new jobs, employers go through a vetting process before being able to recruit via the Hub to ensure they are able to offer genuine employment and comply with sponsorship licence conditions to reduce the risk of workers becoming repeatedly displaced and needing further support. In February 2025 the HYIRRH reported to partners that in the first year of its activities bursaries from the fund, allowed the support of 362 care workers. 4,355 workers in the region had contacted by UKVI as affected by 'revocations'.1,108 (25.4%) have sought support, of which 771 (69.6%) were in-region and eligible. However of these only 71 people (9.2%) have been successfully placed in new roles" with many others (about 600 at the time of the reporting) being supported by case workers but still not matched (see YHIRP update February 2025). The priority of the Hub is to reach more displaced workers and place more workers with ethical, sustainable sponsors. Migrant care workers can both access information about employment rights through the Hub's online platform and its resourcing, including signposting to other support organisation, and also report concerns over exploitation and abuse.

6. Ongoing Challenges

The above examples of responses to the impact of changing migration regulation and persistent labour shortages give insight into how a range of stakeholders are seeking to work to address these challenges and their current scope for action. They are primarily focused on improving access to work. While this is critically important, the study highlights that action is rather limited in key areas that shape work quality and jobs attractiveness. These include low pay, insecure employment contracts, irregular or anti-social working hours, intense nature of work and limited in-work training and career opportunities. Some of these factors have been alleviated by employers' practices, some other have been entrenched by labour shortages.

Pay and working conditions

Faced with acute labour shortages in the post-Brexit, post-COVID environment, increasing pay has been an important strategy used by employers to attract and retain workers; although this has varied by sector, depending on employers' ability to pay higher wages. In the T&S sector, for example, with truck driver shortages, competition between employers increased with hourly median pay for full time HGV drivers increasing by 27% between 2020 and 2023 (ONS 2024b). Vacancy levels have dropped as a result. Similarly, many employers in the hospitality sector sought to increase pay as the sector re-opened, looking to attract new workers after many EU workers had left.

Pressures for pay increases have also come as a result of worker demands in the face of high inflation and rises in the cost of living, notably between 2021-2023. This has led to wage compression between those in lower and middle-waged occupations. Overall marginal pay increases introduced by some employers as a recruitment and retention strategy have not kept up with inflation and had limited impact. Indeed, pay levels for many roles in the four sectors we studied remain benchmarked at or very close to the National Living Wage (Forde et al. 2024). Initiatives such as the Fair Work Charter championed by mayoral authorities have included issues of pay alongside equality and diversity policies, but the number of employers translating these voluntary principles into practice remain limited.

The provisions in the Employment Rights Bill (Department for Business and Trade 2025) including a ban on exploitative zero hours contracts and newly planned fair pay agreements (Samuel 2024) in social care for instance, may help to improve pay, terms and conditions, recruitment and retention. However, they may increase labour costs, a major consideration in tendering processes in commissioning for care in the UK. Care providers have called for the government to provide bridging funds to offset the increases in National Insurance contributions and to help providers deliver the Fair Pay Agreement (Care Home Management 2025).

Skills and training

The dynamics of the changes impacting work and employment post-Brexit and COVID-19, alongside increased use of technology and automation changes the skillsets needed by employers. These changing skill needs must be taken into consideration when developing any industrial strategy with a long-term view and considerations of how the skills systems could be more effectively coordinated to be more responsive and inclusive. In our case studies, the use of apprenticeships was mentioned as one long-term route to addressing the skill needs, although this was not without challenges. The existing apprenticeship system was inaccessible to many employers, especially SMEs, who reported they do not have the capacity to take on apprentices, train them, or afford the costs (in unproductive time) associated with off-site training.

Other barriers include difficulties in finding providers for specialised programmes, for example engineers in the FDM sector. Stakeholders in T&S noted that apprenticeships tend to be too generic and do not equip apprentices with the specialised skills needed for the sector. There was more use made of higher-level apprenticeships to train managers (e.g. in T&S and Hospitality), than intermediate level apprenticeships.

Work readiness

One warehousing company noted that the work/learn-readiness of potential young apprentices at this intermediate level was poor. Hospitality interviewees reported insufficient skills amongst college leavers but also the "unaffordability" of training.

"I can't afford to pay living wage for someone that isn't trained because I need to spend too much time with them."

Hospitality interview, chef and restaurant owner

Overall while different strategies or reactive practices have been adopted by employers across sectors in the areas of pay, flexible working, upskilling, diversity and technology, our evidence points to persisting levels of labour shortage and voluntary worker turnover and quitting. Despite employers' efforts to tackle shortages and attract new workers and multi-agency initiatives to engage new groups of workers, our study finds that employment conditions in these sectors often remain unattractive to the local population for a variety of reasons mostly due to the conditions of work and low pay.

7. Conclusion

The new policy landscape across both migration and employment regulation, namely the White Paper on Migration and the Employment Rights Bill provide new challenges for employers as well as new opportunities for partnership among key stakeholders to strengthen the links between migration policy, workforce strategies and labour protections.

While public-private cooperation appears crucial to respond to the ongoing labour shortage crisis in key sectors and protect migrants from abuse, it is likely that a stricter approach to legal routes may further push some work underground and worsen working conditions. Increasing the vulnerability for one group of workers has the potential to worsen conditions for all.

A central finding of this research is that both workers and employers need security and stability to make longer term plans and investments, and that frequently changing regulation prevents their ability to do this. If higher retention and lower turnover improve productivity and contribute to growth, then providing frameworks that can help improve longer-term certainty, including routes for settlement for migrants and their families are key.

Below we provide recommendations aimed at policy makers at the national level addressing migration for work in the UK. We recommend that a joint approach to migration and skills requires the engagement of different parties in the development of longer-term migration plans that take into account industrial needs as well as the viability of public services and critical sectors such as those considered in the study. We also suggest that a shift in policy discourse is urgently needed, away from de-valuing those sectors deemed as "low skilled" and onto emphasising the importance of improving working conditions to make jobs more attractive for all, improve retention and promote *inclusive* growth.

Immigration policy: a joint, realistic and sustainable approach

This report calls for a joint approach to migration and good work that involves a cross-departmental, multi-agency and multi-level approach shifting the focus from controlling migration to improving conditions of work in low paying, migrant-relying sectors. The recommendations are divided into three areas: migration policy, employment regulation; and skills, training and vocational education.

1. A cross-departmental strategy on migration for work

Our research shows that cutting legal migration routes and restricting criteria for entry is not realistic at a time of ongoing shortages and demographic decline and risks putting entire essential services like social care under further strain, risking its viability as a sector. A realistic and long-term migration plan that considers labour and skills gaps is needed in dialogue with industry, migrant rights advocacy and trade unions. We recommend for the Government to:

Expand the scope of the new Labour Market Evidence (LME) group proposed by in the White Paper on immigration to include HR experts, trade unions and mayoral authorities. The inclusion of these bodies will contribute to meeting the aim of the LME to share evidence about the state of the workforce, training and local participation in key sectors, and critically contribute knowledge to workforce planning.

Expand the remit of the LME group: working more closely with industry, trade unions and researchers the LME can obtain a holistic understanding of the root causes of shortages, poor investment in skills and inactivity among the UK workforce. Our research shows that while pay and hours are key to make jobs attractive, the quality of employment, training and development, availability of flexible working and inclusive environments are crucial to improve retention.

Radically re-think the skills categories in future migration systems: currently the labelling of jobs in food manufacturing, logistics and hospitality and social care as "low-skilled" does not reflect their role as the backbone of key sectors. Our research demonstrated the problematic shift from valuing these sectors as 'essential' during the pandemic to perceiving them as 'low-skilled/low-value' soon after COVID-19. Instead they provide foundational infrastructures to the highly strategic sectors identified in the Government industrial growth strategy (UK Government 2024a).

Promote pathways to settlement rather than temporary migration. Reactive, short-term and temporary visa schemes have proven negative for both workers and businesses. Addressing issues of high turnover and low productivity through a long-term workforce strategy can only be supported by a migration system that allows workers to stay, bring their dependants and thrive in their jobs and build stable lives.

Avoid the creation of a small number of occupationally based schemes. The government proposal to 'only allowing a narrow list of critical shortage occupations onto the Temporary Shortage List' (HM Government 2025) is similar to the introduction of ad hoc temporary schemes under the previous system and should be re-considered. Our research shows how segregation and "crowding" of migrants into one temporary occupational route contributed to system abuse, the emergence of bogus employers/agencies and exploitative practices.

Streamline the process of changing employer sponsors for migrants on Care Worker visas and create mechanisms for the provision of support for migrant workers who have been victims of exploitation or bogus employment.

Create a stronger role for combined authorities in the migration and good work agenda. Our research shows that in Yorkshire and the Humber there is a growing diverse population whereby new migrants arrived post Brexit make an important contribution to all the four sectors-and in particular those where employment has grown (T&S). In order to lift conditions in sectors relying on migration (and smooth community tensions in Reform voting areas) mayoral authorities should be empowered to improve working conditions in these sectors.

Turn existing employer voluntary schemes championed by local authorities such as "fair work charters" into enforceable tools to improve employment, boost inclusivity, and make work pay for both locals and migrants.

2. Employment regulation and enforcement partnerships

The Employment Bill has the potential to have a critical impact in terms of improving working conditions and therefore the quality and attractiveness of jobs, reducing turnover and improving retention across the four sectors. Our recommendations in this area are for the Government to:

Conduct effective monitoring of how measures in the new Bill are communicated to and applied by employers, especially in SMEs, alongside mapping its effects and barriers to enforcement.

Close loopholes in employment status regulation. One limitation of the Bill is the missed opportunity to move to regulate dependent self-employment. Critical recommendations in this area have been made elsewhere (See ReWage 2024a). Our research in the T&S sector shows that while some workers prefer self-employment, there is still an ample use of bogus self-employment especially in transport/delivery.

Ban zero-hour contract in all sectors where agency and temporary work are common. While this is already proposed in the Employment Bill there is also need to close existing loopholes – e.g. as recommended by others 'employers ought not to be able to avoid the new rules by using low-hours contracts' (Institute for Employment Rights 2025).

Provide substantive public investment into the social care sector as an essential sector struggling with long-term workforce pressures and to make fair pay agreements viable for private providers and local authorities.

3. Skills, training and vocational education

We recommend that to develop a strategy that would address the skills and training needs of a changing economy, the Government should:

Closely consider changes in employer skill needs to develop a workforce strategy with a long-term view. Any future Shortage Occupation List that may influence the migration scheme must reflect a more nuanced understanding of the nature of skills and skills needs beyond a mere low and high skill binary.

Consider the impact of digitalisation on skills, recognising different uses and effects of digitalisation and the use of new technologies across sectors. The increased use of technology and automation has led to a shift in the skills employers are looking for, with a bigger need to recruit engineers and technical specialists, especially in food and drink, and warehousing. Some occupations and jobs traditionally considered manual or unskilled may need to be up-skilled as a result of increased digital skill requirements. A long-term strategy to support up-skilling and retraining is needed (Digit 2025).

Promote collaboration between local colleges and employers, and where relevant, unions and migrant support groups, to tackle ongoing skills gaps by providing integrated training built around local labour and skills shortages. This should include sector-level dialogue and collaboration over apprenticeships, to ensure that apprenticeships are accessible to all employers, and that they meet the needs of employers and workers in individual sectors.

Enhance approaches to validate and recognise migrant skills. Government, particularly the Department of Education and Department for Business and Trade should work closely with colleges, employers, migrant organisations and accrediting bodies on mechanisms to enable migrant workers to transfer their qualifications into UK-recognised ones and accredit competencies to enable transition into jobs for which they are suitably qualified. This also requires ensuring the provision of additional English training to support migrants to gain specialist or technical language skills.

Myth-bust the 'migration versus training for UK workers' trade off. Training the UK workforce is not something that is in contradiction with the provision of legal migration routes in sectors with critical labour shortages, despite this being a key assumption in the White Paper on immigration. On the contrary, migration can benefit workplace learning and incentivise employers to invest in training (CIPD 2023). Our research shows that with tight labour markets, vacancies and subsequent labour intensification, time for training is rather reduced and employers are less inclined to engage in apprenticeship programmes or invest in workplace training.

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Find out more

If you have found this report useful or would like further information about this project or our broader work, please contact Gabriella Alberti or visit our website.

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