

Durham Region Agriculture Labour Market Survey

Data Report

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Community Development Council Durham

Introduction

The data presented in this report is the result of the Durham Region Agriculture Labour Market Survey that was conducted from January 8 to March 2, 2007. The purpose was to help determine the specific training and employment needs of the agricultural and agribusiness sector in the Region of Durham, and to identify gaps in, and barriers to accessing, current training and employment programs and services available in the Region.

The survey was sent to 1,186 agricultural professionals across all eight of the Region's municipalities. A total of 305 were returned within the specified timeframe, providing a return rate of 25.7% and representing 18.09% of the farms in Durham.

This report presents all of the data from this survey, and will be used by the Agricultural Needs Research Advisory Committee to help determine a course of action to help improve and support the agricultural industry in the Region of Durham.

For more information on this report, the survey, or the Agricultural Needs Research Advisory Committee, please contact:

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Durham College

Community Development Council Durham

North Durham Social Development Council

Durham Region Local Training Board

Ministry of Agriculture, Food and Rural Affairs

Ontario Federation of Agriculture

Region of Durham, Economic Development and Tourism

University of Ontario Institute of Technology

Christian Farmers Federation of Ontario

Durham Region Federation of Agriculture

Durham Agricultural Advisory Committee

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Summary

Demographics

The age of our sample was congruent with the age of farmers across the province of Ontario (2001 Census of Agriculture). The majority of our respondents (91.48%) were over the age of 40 years, with most (67.21%) being over the age of 50 years of age.

Nearly all of our respondents were Farm Owner/Operators (90.49%)

The top five commodity (1) groups represented by our sample population were;

1. Cattle (25.90%)
2. Dairy (17.38%)
3. Grain and Oilseed (16.39%)
4. Fruit and Vegetable (7.21%)
5. Horse and Pony (6.56%).

The majority of respondents (57.19%) reported gross farm receipts in 2006 of under \$100,000; 26.03% reported gross farm receipts between \$100,000 and \$499,999, and 16.78% reported gross farm receipts of \$500,000 and over.

The geographic distribution of respondents was essentially equal across Clarington (23.61%), Scugog (22.62%), Uxbridge (21.92%) and Brock (19.02%), with a minority coming from the urban (2) municipalities (10.82%). This is congruent with the general distribution of agricultural operations across the Region.

29.18% of farms reported having access to an internet connection. The highest level of access in the rural municipalities occurs in Brock (37.93%), followed by Scugog (30.43%), Clarington (27.78%), and Uxbridge (26.87%).

Hiring Practices

55.73% of farms in Durham hired paid employees in 2006.

Therefore, an estimated 2641 farm employees were hired across the Region in 2006.

47.21% of farms in Durham intend to hire paid employees in 2007.

64.12% of employees hired by Durham farms in 2006 were seasonal part-time.

32.94% of employees hired by Durham farms in 2006 were year-round, part-time.

31.94% of employees hired by Durham farms in 2006 were year-round, full-time.

15.29% of employees hired by Durham farms in 2006 were seasonal, full-time.

Farm employees are primarily recruited through informal networks (i.e. family, friends, neighbours, etc.).

26.89% of farms in Durham hire students.

Summary

Hiring Needs and Barriers

36.72% of respondents indicated that they have difficulty in recruiting employees with the skills they need for their farm operation.

The most difficult employees skills, knowledge and/or qualifications to find in Durham are:

1. Skilled Trades
2. A general knowledge of farm regulations
3. Commodity specific knowledge and/or experience

Other difficulties included finding employees willing to put in the time required to complete farm work.

The most significant barriers to recruiting and retaining farm employees in Durham are:

1. The lack of a pool of labour with specialized skills
2. The inability to provide competitive wages
3. The lack of a pool of general labour

32.79% of farms in Durham provide some form of on-the-job training for their employees.

22.95% of farms in Durham pay for employee training when appropriate.

Training Needs and Barriers

Farmers in Durham are primarily interested in the following areas of training and education:

1. New production technology
2. Health and safety
3. Business, tax and financial planning
4. Computer/Internet
5. Sales and marketing

28.85% of farmers in Durham have difficulty in accessing education and training opportunities.

The primary barriers to accessing these opportunities in Durham are:

1. The time commitment required
2. Training is not offered at a convenient time of year or day
3. Training is not available locally
4. The cost of training is prohibitive

Demographics

Age Structure

The majority of farmers in our sample were over the age of fifty years (67.21%), which is not surprising given that Statistics Canada indicates that the farming population in Durham, as in the rest of Canada, is aging (2001 Census of Agriculture).

Further, Figure 1 indicates that nearly 85% of cattle farmers in Durham are over the age of fifty. This commodity group is followed by Horse and Pony, where 75% of operators are over the age of fifty, and by grain and oilseed, where 70% of producers are over fifty years old.

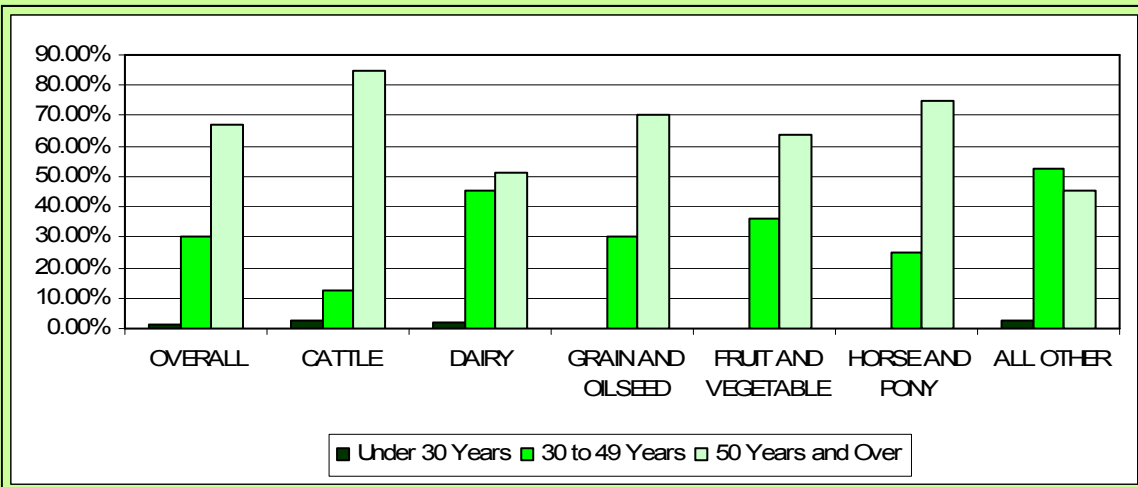


Figure 1: Age structure of farmer population in Durham by major commodity groups

Role in the Agricultural Industry

Nearly all (96.06%) of the survey respondents identified themselves as either a farm owner/operator or an agribusiness owner operator. Therefore, we consider the data presented here to be representative of owners and operators in the local agricultural industry, and not of the employees who work for them.

Commodity Groups

The primary commodity groups represented in our sample, as determined by the participants identifying the major product type produced by their operation, were cattle, dairy, grain and oilseed, fruit and vegetable, and horse and pony (2). As demonstrated in Figure 2, our sample is congruent with Statistics Canada (2001 Census of Agriculture) data on the major agricultural product groups in the Region. Major secondary commodities (i.e. those other products produced by an operation that do not constitute the majority of their operation), included grain and oilseed products, nursery products and sod, cattle, and hay.

Within our sample, dairy, fruit and vegetable, and grain and oilseed producers are over represented, while smaller and miscellaneous commodity groups are under represented.

Demographics

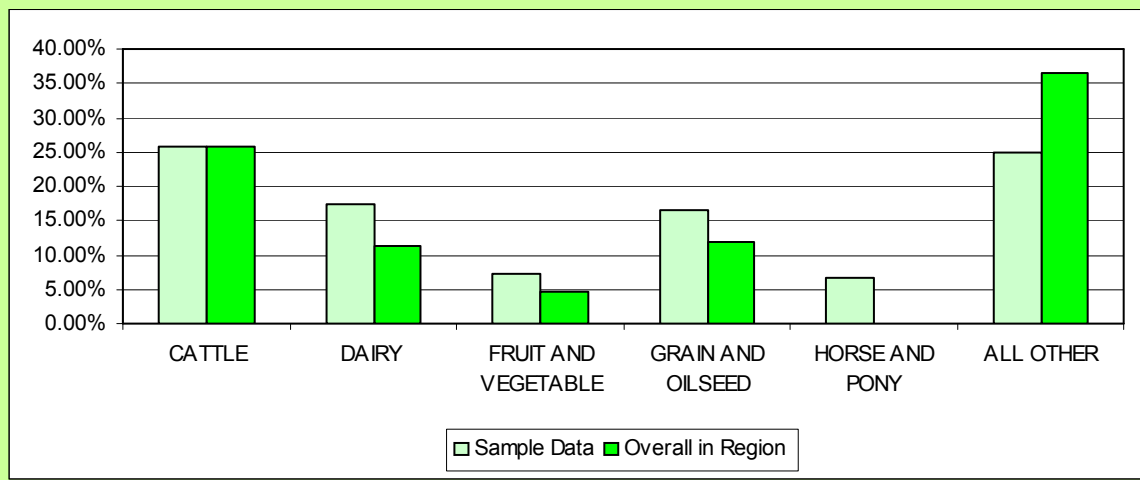


Figure 2: Breakdown of survey sample by major commodity compared to Statistics Canada (2001) data for the Region of Durham (3)

Geographic Representation

The sample was essentially distributed evenly between the four municipalities in Durham that are primarily rural; Brock, Uxbridge, Scugog, and Clarington, with a small percentage being located in the regions 4 primarily urban municipalities; Pickering, Ajax, Whitby, Oshawa (4).

Gross Farm Receipts (GFR's)

The majority of respondents (54.75%) reported under \$100,000 in gross farm receipts for the year 2006, with nearly 25% reporting between \$100,000 and \$499,999, and 16% reporting over \$500,000. Only 6% reported gross farm receipts of over \$1,000,000 for the year 2006. As, indicated in Figure 4, this structure is congruent with the breakdown reported by Statistics Canada for all farms in the Region.

GFR's and Major Commodities

Broken down by commodity, fruit and vegetable and dairy producers were most likely to report 2006 gross farm receipts of over \$500,000 (see Figure 5). This is congruent with Statistics Canada data that identifies dairy as the number one source of agricultural income in the Region of Durham (2001 Census of Agriculture).

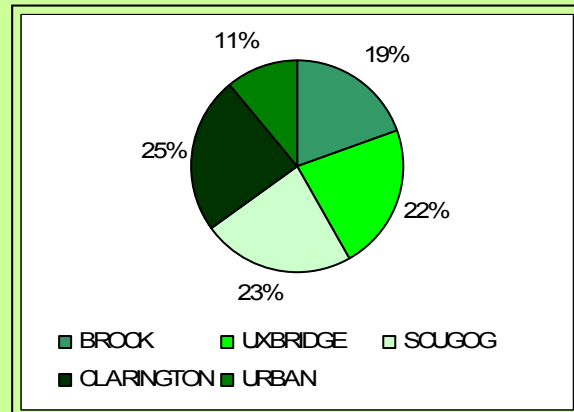


Figure 3: Distribution of survey respondents by municipality

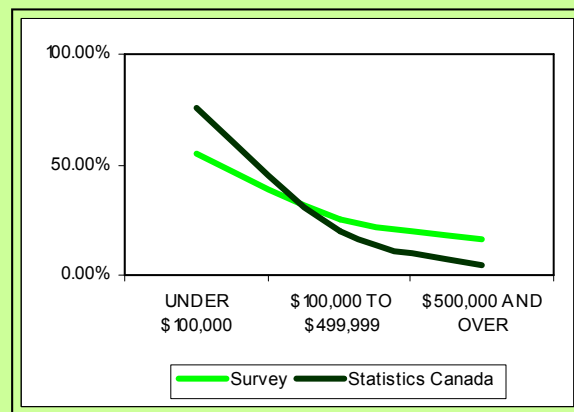


Figure 4: Distribution of survey respondents by 2006 Gross Farm Receipts

Demographics

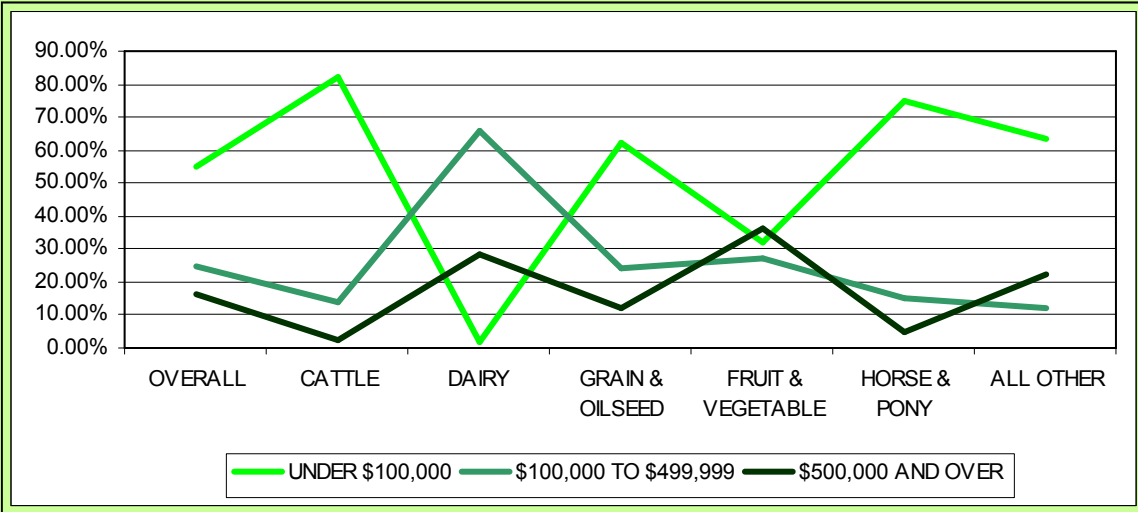


Figure 5: Gross Farm Receipts by major commodity groups

GFR's and Geography

Farms in Scugog were most likely to report Gross Farm Receipts of over \$500,000 in 2006, while operations in Uxbridge were most likely to report Gross Farm Receipts of under \$100,000 in 2006 (see Figure 6).

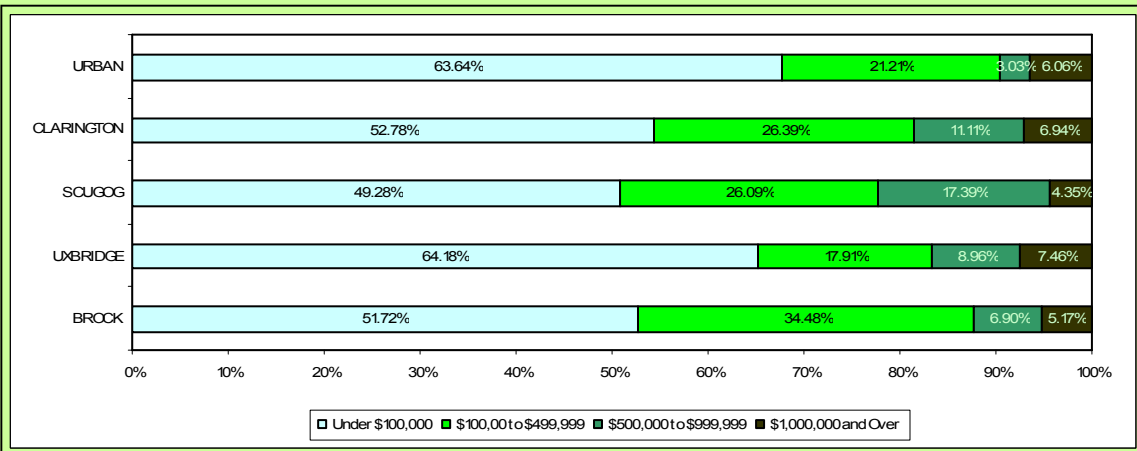


Figure 6: Geographic distribution of farms in Durham by 2006 Gross Farm Receipts

Internet Access

Overall, 29.18% of respondents reported having access to a high-speed (broadband) internet connection.

Farms in Brock reported the highest rate of access to high-speed internet connections (37.93%), followed by Scugog (30.43%), Clarington (27.78%) and Uxbridge (26.87%). Those farms located in the urban municipalities reported the lowest rate of access (24.24%).

See Appendix B for a complete report on internet access in Durham's agriculture community.

Hiring Practices

Paid Employees Hired in 2006

In 2006 55.73% of farms in Durham hired paid employees for their agricultural operations. Therefore, an estimated 2641 employees were hired to work on farms in Durham in 2006.

Fruit and vegetable and dairy farmers were most likely to hire paid employees, as were those farms located in Brock and Uxbridge. Farms with Gross Farm Receipts between \$500,000 and \$999,999 were also more likely to hire paid staff than other operations.

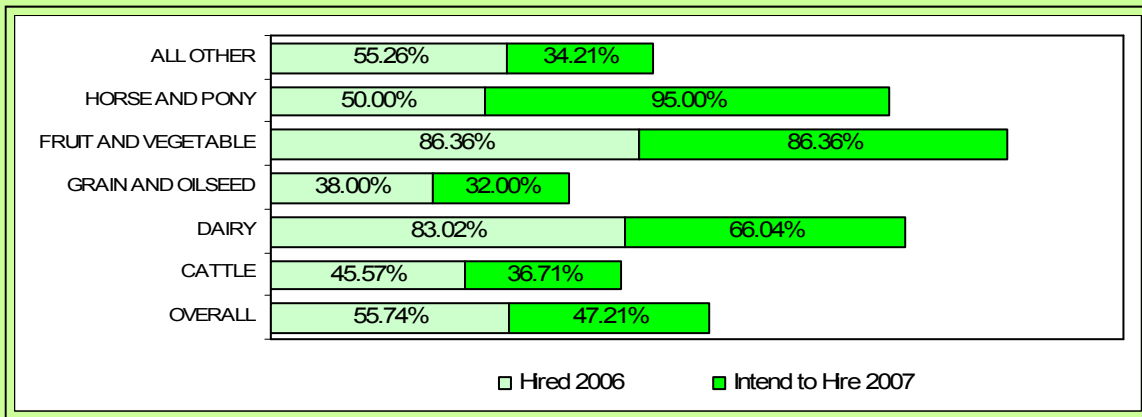


Figure 7: Hiring practices in 2006 and 2007 (projected) by major commodity group

Intentions to Hire in 2007

In 2007, 81.76% of farms in Durham who hired in 2006 intend to hire paid employees again. Therefore, an estimated 1966 employees will be hired to work on farms in Durham in 2007.

As Figure 7 indicates, there is no projected change from 2006 to 2007 in the hiring practices of fruit and vegetable operations. Horse and pony operations project the largest increase in the number of farms who intend to hire in 2007 versus 2006 and dairy farmers project the largest decrease in the number of operations who intend to hire in 2007 versus 2006.

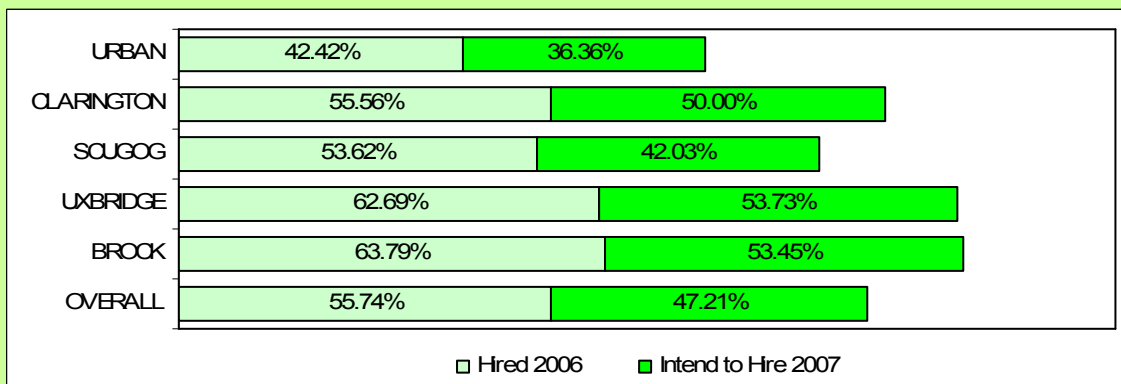


Figure 8: Hiring practices in 2006 and 2007 (projected) by municipality

Hiring Practices

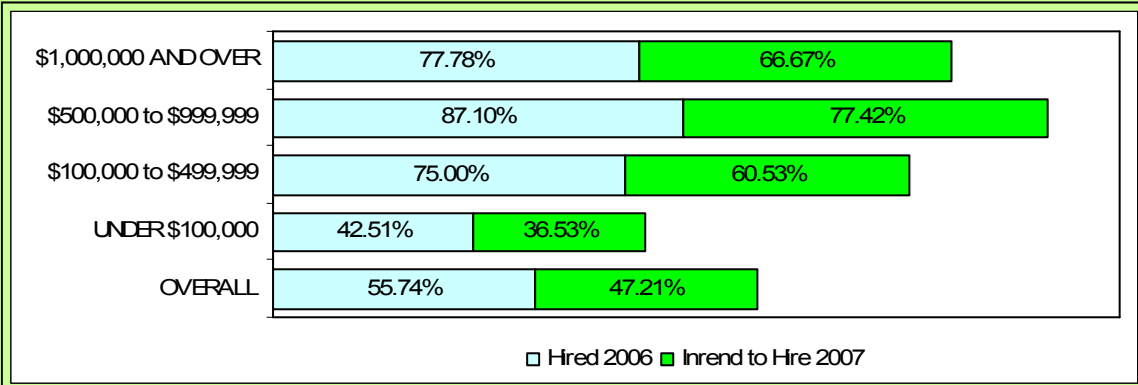


Figure 9: Hiring practices in 2006 and 2007 (projected) by 2006 Gross Farm Receipts

Students and Immigrant/Off-Shore Labour

In 2007, 26.89% of farms in Durham intend to hire students, with fruit and vegetable, dairy and horse and pony operations most likely to do so.

Overall, only 4.26% of all farms in Durham intend to hire immigrant/off-shore labour in 2007. This low figure is reflected in all commodity groups with the exception of fruit and vegetable, where 40.91% of all operators intend to hire immigrant labour in 2007.

Further, 100% of those farms that intend to hire immigrant/off-shore labour also intend to hire students in 2007. As indicated in Figure 10, those commodity groups that are more likely to hire students are also more likely to hire immigrant/off-shore labour.

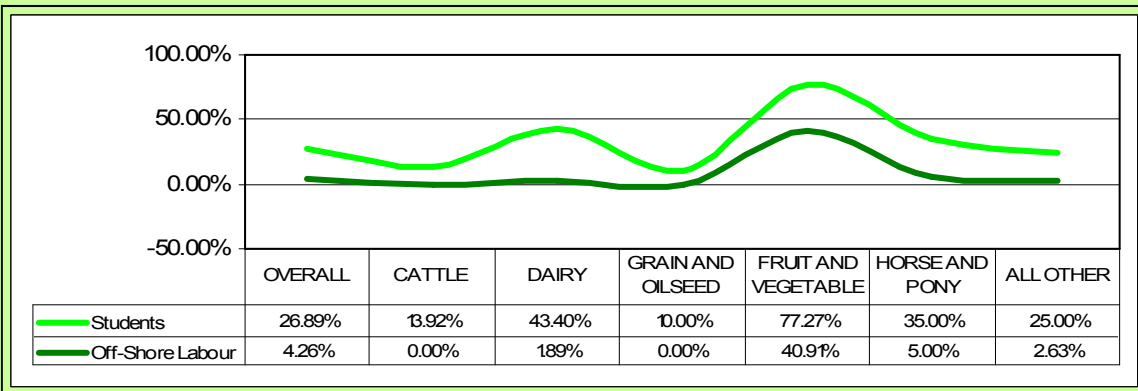


Figure 10: Intention to hire students and immigrant/off-shore labour by major commodity group

Recruitment Points

Employees in Durham's agricultural sector are recruited almost exclusively via informal and community networks (i.e. family, friends, neighbours), with 84.12% of employees being recruited this way in 2006, and 86.11% of employers intending to use the same method in 2007. Of all other options, the primary recruitment points were newspaper ads, referrals, and the Seasonal Agriculture Worker Program.

Hiring Practices

Employee Types by Commodity

Agriculture employees in Durham are primarily hired on a seasonal, part-time basis, with 64.12% of farms that hired in 2006 hiring this type of employee. Farms were least likely to hire employees in a seasonal, full-time role, with the fruit and vegetable producers being a notable exception. Dairy producers were most likely to hire year-round employees. Dairy producers were most likely to hire year-round employees.

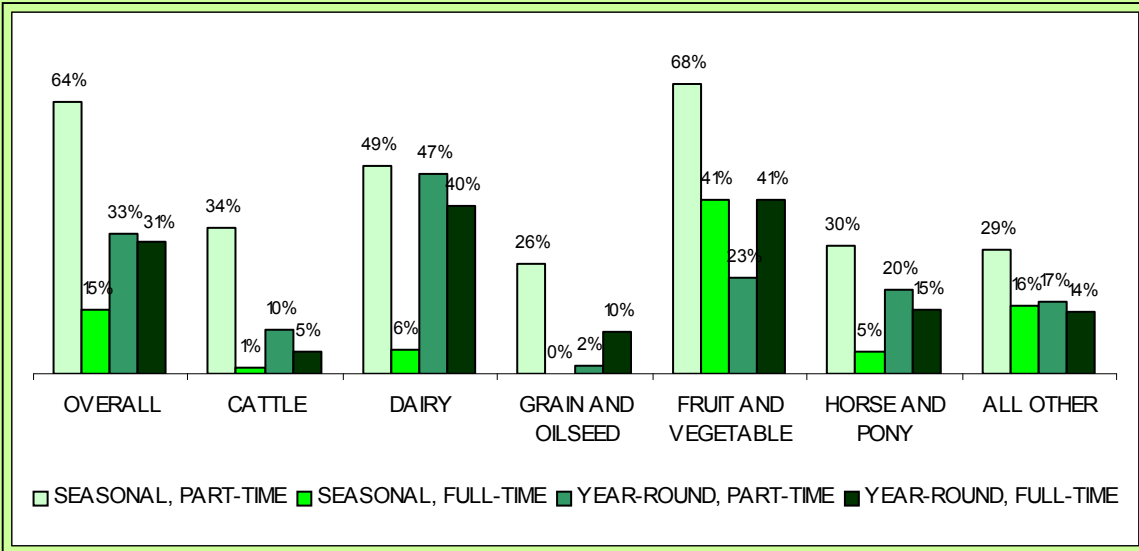


Figure 11: Breakdown of employee categories by percentage of farms that hired in major commodity groups

Employee Types by Municipality

The majority of seasonal farm employees were hired in Clarington, as were the majority of year-round, full-time employees. The majority of year-round, part-time employees were hired by farms in Uxbridge. In all municipalities, the majority of agriculture employees hired were seasonal, part-time.

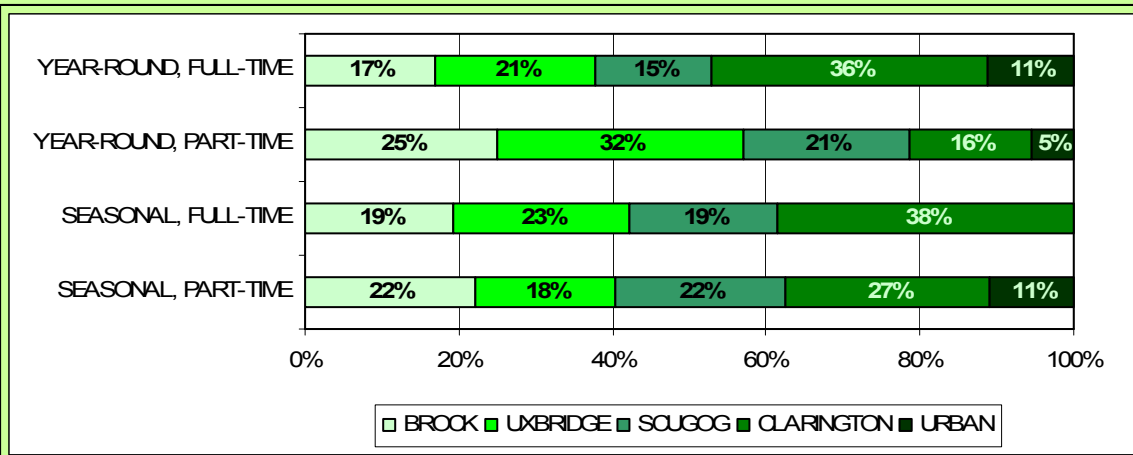


Figure 12: Percentage of employees hired in each category by municipality

Hiring Practices

Employee Types by Gross Farm Receipts

Only those farms with reported Gross Farm Receipts of over \$500,000 primarily hired year-round, full-time employees.

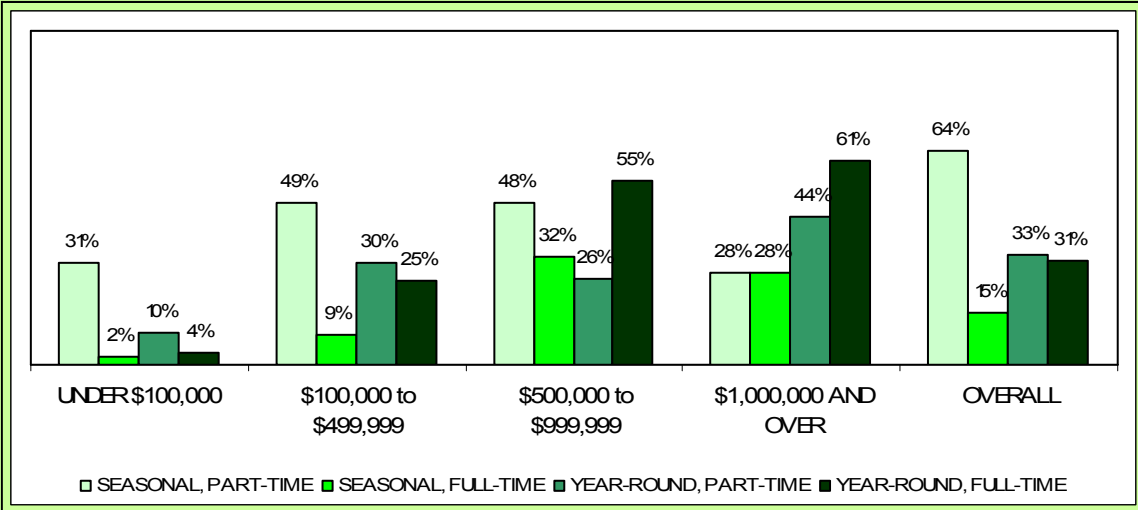


Figure 13: Breakdown of employee categories by percentage of farms that hired in each income category

Hiring in Multiple Categories

Of those farms that hired paid staff in 2006, 36% hired employees in more than one temporal category. Those operations that hired seasonal, part-time staff were least likely to hire in any of the other categories, while those who hired seasonal, full-time staff were most likely to hire employees in the other categories.

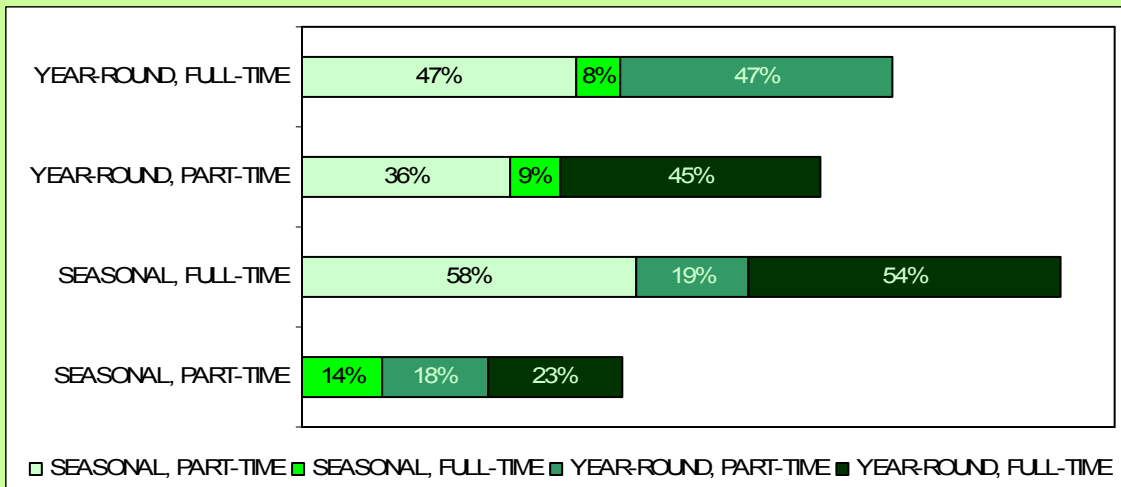


Figure 14: Percentage of farms in each category that also hired in the other three categories

Availability of Skilled Labour

General Availability of Skilled Labour

Overall, 37% of farms in Durham have difficulty finding employees with the knowledge and skills that they require to operate their business. In 2006, 81% of farms that have difficulty hired employees anyway, and in 2007, 72% of farms that have difficulty intend to hire again. Notably, 65% of those farms that are struggling to recruit employees with the skills that they require do not have access to a high-speed internet connection.

Those farms located in Uxbridge and Scugog have the most difficulty finding employees with appropriate skill sets, followed by Brock, the urban municipalities, and Clarington.

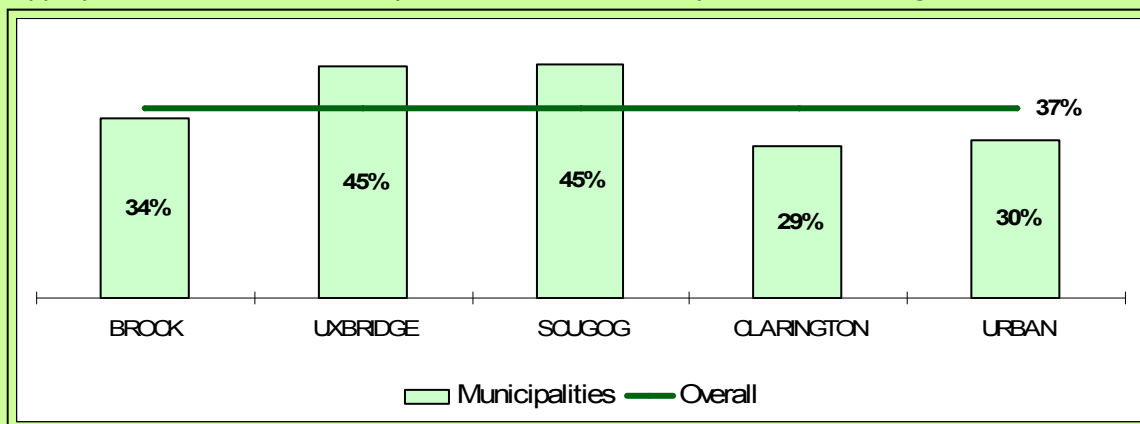


Figure 15: Percentage of farms that experience difficulty recruiting employees by municipality

Nearly 70% of fruit and vegetable operations in Durham have difficulty recruiting the employees that they require, as do 53% of dairy producers, and 50% of horse and pony operations (see Figure 16).

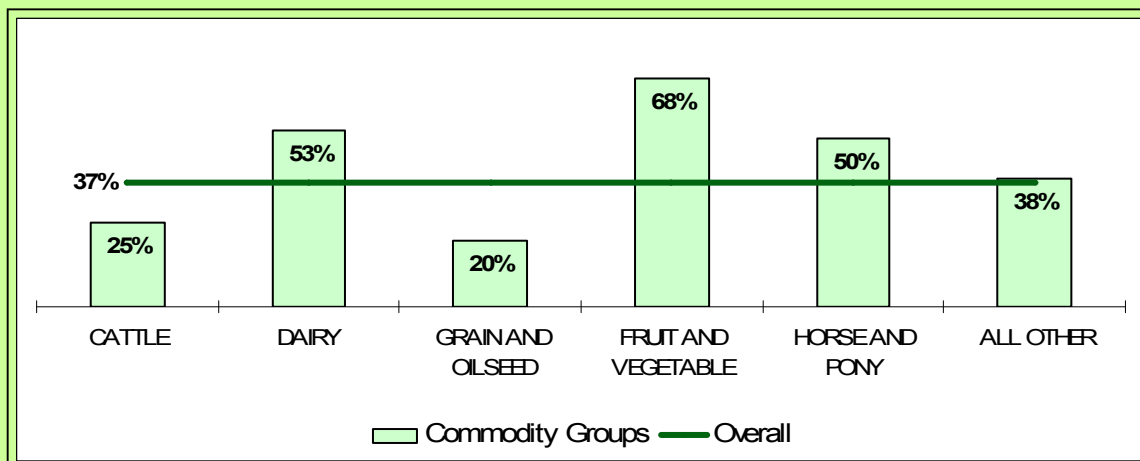


Figure 16: Percentage of farms that experience difficulty recruiting employees by major commodity group

Availability of Skilled Labour

While only 25% of farms that reported gross farm receipts of under \$100,000 in 2006 have difficulty recruiting employees with the skills that they require, 71% of those farms that reported gross farm receipts of over \$500,000 have difficulty recruiting (see Figure 17).

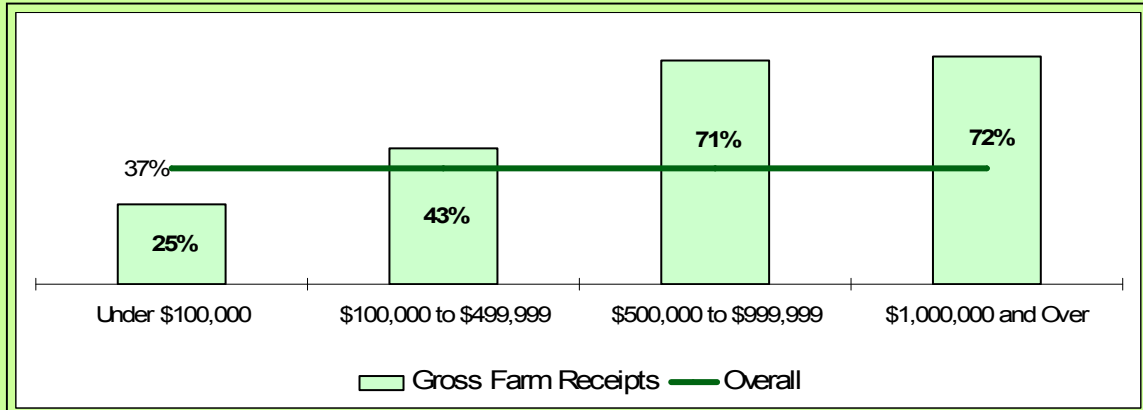


Figure 17: Percentage of farms that experience difficulty recruiting employees by GFR's

Specific Skills Required

Overall, farms in Durham had the most difficulty finding employees trained in the skilled trades, those with good general knowledge of farm regulations, and those with commodity specific knowledge and or experience. Grain and oilseed producers have the most difficulty, with 90% of the farms in this commodity group experiencing difficulties in recruiting employees with general knowledge of farm regulations and 80% experiencing difficulty recruiting employees with the skilled trades required by their operations. Fruit and vegetable producers also experience considerable difficulty recruiting in the skilled trades, and, along with grain and oilseed farmers, they experience considerably more difficulty in recruiting employees with the up-to-date and relevant technical knowledge as compared to all other major commodity groups.

Table's 1, 2, and 3 present these difficulties by commodity, municipality, and gross farm receipts.

Barriers to Recruitment

The primary recruitment barrier faced by farms in Durham is a considerable shortage of agricultural employees with the specialized skills required by the local industry. This is closely followed by the ability of farmers to pay competitive wages to skilled workers. These issues are most pronounced in Brock, where 80% of farmers indicate that they do not have access to a pool of labour with specialized skills, and 70% indicate that they are not able to pay competitive wages. Fruit and vegetable farmers represent the commodity group most affected by the first barrier, with 87% of operators indicating that there is a shortage of workers with the skills that they require in Durham, while 80% of grain and oilseed producers are unable to pay competitive wages to the employees that they require. Horse and pony operators are the commodity group least affected by all of the potential barriers.

Tables 4, 5, and 6 look at these barriers by commodity, municipality, and gross farm receipts.

Training Offered

Overall, only 33% of farms in Durham offer employee training. However, of those farms that hired in 2006, 54% offered employee training, and of those farms that intend to hire in 2007, 57% plan to train their employees.

Only, 23% of farms in Durham offer to pay for all or part of the cost employee training opportunities. Of those farms that hired in 2006, 38% paid for employee training opportunities, and in 2007 38% of those farms that intend to hire will also pay for employee training opportunities.

Farms located in Clarington and the urban municipalities are most likely to train their employees on site or pay for all or part of off-site training programs.

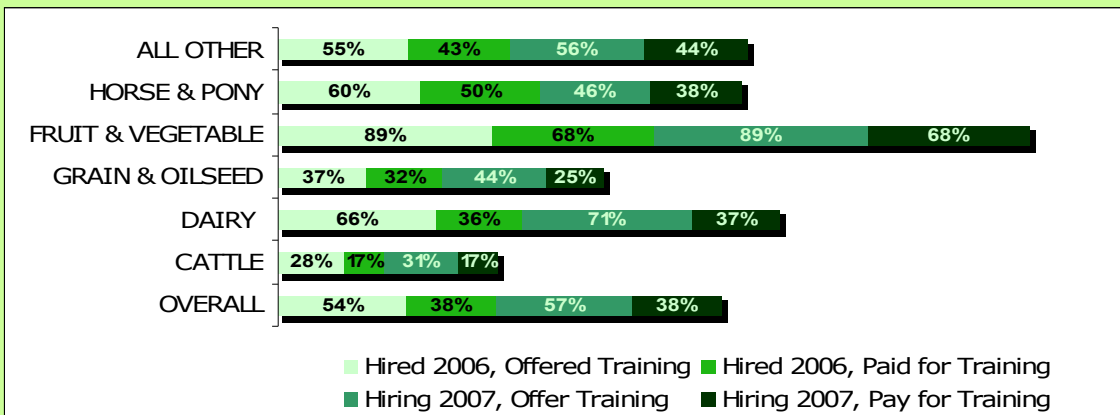


Figure 18: Hiring practices versus training opportunities offered by commodity group

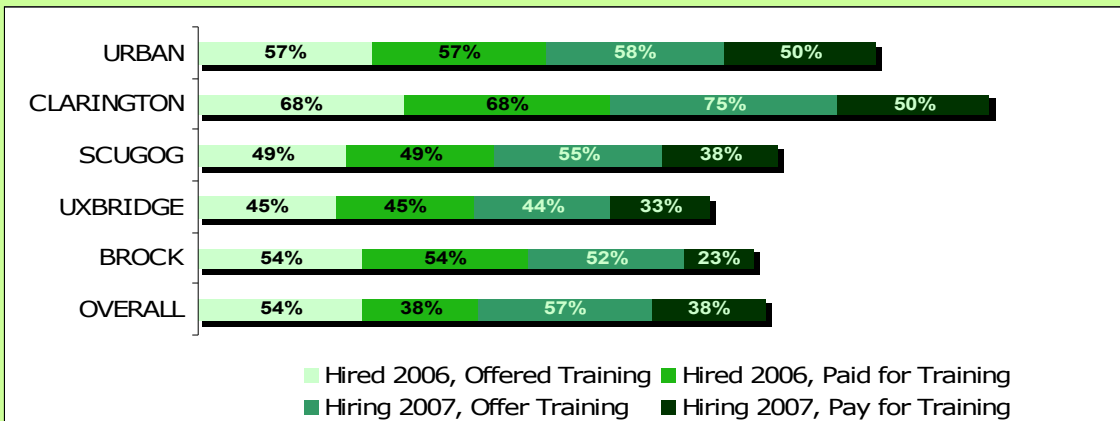


Figure 19: Hiring practices versus training opportunities offered by municipality

| | Overall | Cattle | Dairy | Grain & Oilseed | Fruit & Vegetable | Horse & Pony | All Other |
|--|---------|--------|-------|-----------------|-------------------|--------------|-----------|
| Knowledge of farm regulations | 60% | 55% | 64% | 90% | 53% | 50% | 55% |
| Skilled trades | 62% | 65% | 71% | 80% | 73% | 30% | 48% |
| Up-to-date technical/technological knowledge and/or experience | 46% | 35% | 46% | 70% | 73% | 20% | 38% |
| Customer service skills | 32% | 25% | 18% | 30% | 67% | 30% | 34% |
| Computer Skills | 24% | 20% | 29% | 40% | 40% | 10% | 14% |
| Up-to-date/relevant certifications | 34% | 30% | 25% | 60% | 67% | 10% | 28% |
| Custom operations | 27% | 45% | 18% | 60% | 27% | 10% | 17% |
| Commodity specific knowledge and/or experience | 57% | 35% | 79% | 60% | 67% | 30% | 55% |

Table 1: Percentage of farms that have difficulty recruiting specific skills by commodity group

| | Overall | Brock | Uxbridge | Scugog | Clarington | Urban |
|--|---------|-------|----------|--------|------------|-------|
| Knowledge of farm regulations | 60% | 55% | 50% | 65% | 67% | 70% |
| Skilled trades | 62% | 60% | 47% | 30% | 67% | 80% |
| Up-to-date technical/technological knowledge and/or experience | 46% | 55% | 40% | 16% | 57% | 50% |
| Customer service skills | 32% | 30% | 33% | 15% | 38% | 20% |
| Computer Skills | 24% | 45% | 17% | 7% | 24% | 30% |
| Up-to-date/relevant certifications | 34% | 20% | 33% | 15% | 48% | 40% |
| Custom operations | 27% | 10% | 40% | 12% | 24% | 30% |
| Commodity specific knowledge and/or experience | 57% | 65% | 63% | 17% | 61% | 70% |

Table 2: Percentage of farms that have difficulty recruiting specific skills by municipality

| | Overall | Under \$100,000 | \$100,000—\$499,999 | \$500,000—\$999,999 | \$1,000,000 & Over |
|--|---------|-----------------|---------------------|---------------------|--------------------|
| Knowledge of farm regulations | 60% | 45% | 70% | 77% | 62% |
| Skilled trades | 62% | 41% | 79% | 73% | 69% |
| Up-to-date technical/technological knowledge and/or experience | 46% | 29% | 64% | 45% | 54% |
| Customer service skills | 32% | 21% | 36% | 32% | 54% |
| Computer Skills | 24% | 14% | 30% | 27% | 38% |
| Up-to-date/relevant certifications | 34% | 19% | 42% | 50% | 38% |
| Custom operations | 27% | 26% | 33% | 18% | 31% |
| Commodity specific knowledge and/or experience | 57% | 41% | 73% | 64% | 54% |

Table 3: Percentage of farms that have difficulty recruiting specific skills by GFR's

| | Overall | Cattle | Dairy | Grain & Oilseed | Fruit & Vegetable | Horse & Pony | All Other |
|---|---------|--------|-------|-----------------|-------------------|--------------|-----------|
| Access to a pool of general labour | 52% | 45% | 64% | 50% | 67% | 20% | 48% |
| Access to a pool of labour with specialized skills | 65% | 55% | 79% | 70% | 87% | 40% | 59% |
| Ability to provide competitive wage | 60% | 50% | 64% | 80% | 67% | 30% | 62% |
| Ability to provide sufficient paid hours | 48% | 50% | 50% | 70% | 27% | 50% | 48% |
| Ability to provide training and education opportunities | 44% | 45% | 57% | 60% | 27% | 30% | 38% |

Table 4: Percentage of farms experiencing given barriers by commodity group

| | Overall | Brock | Uxbridge | Scugog | Clarington | Urban |
|---|---------|-------|----------|--------|------------|-------|
| Access to a pool of general labour | 52% | 65% | 50% | 52% | 52% | 30% |
| Access to a pool of labour with specialized skills | 65% | 80% | 63% | 74% | 57% | 40% |
| Ability to provide competitive wage | 60% | 70% | 57% | 61% | 62% | 40% |
| Ability to provide sufficient paid hours | 48% | 65% | 40% | 45% | 52% | 40% |
| Ability to provide training and education opportunities | 44% | 45% | 37% | 48% | 42% | 50% |

Table 5: Percentage of farms experiencing given barriers by municipality

| | Overall | Under \$100,000 | \$100,000—\$499,999 | \$500,000—\$999,999 | \$1,000,000 and Over |
|---|---------|-----------------|---------------------|---------------------|----------------------|
| Access to a pool of general labour | 52% | 38% | 64% | 59% | 54% |
| Access to a pool of labour with specialized skills | 65% | 48% | 82% | 82% | 69% |
| Ability to provide competitive wage | 60% | 45% | 73% | 77% | 54% |
| Ability to provide sufficient paid hours | 48% | 52% | 49% | 45% | 31% |
| Ability to provide training and education opportunities | 44% | 31% | 55% | 59% | 38% |

Table 6: Percentage of farms experiencing given barriers by GFR's

Employer Education & Training

Areas of Interest

Overall, 50% of farmers in Durham have indicated a general interest in education and training opportunities for themselves. Of the major commodity groups, fruit and vegetable producers have the most interest in pursuing educational opportunities related to their agricultural operations, they are followed closely by dairy producers (see Figure 20).

The specific areas of interest for training and education of farmers in Durham are in health and safety, new production technologies, business, tax and financial planning, computer and internet usage, and general sales and marketing. Figure 22 highlights the level of interest in each area of education and training within each of the major commodity groups.

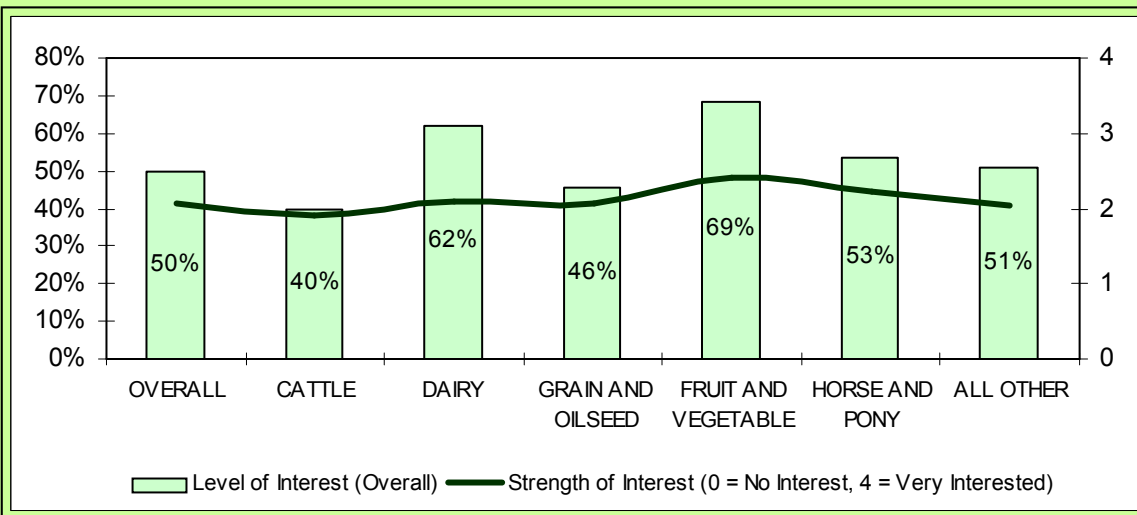


Figure 20: Overall interest in education opportunities and strength of interest by major commodity group

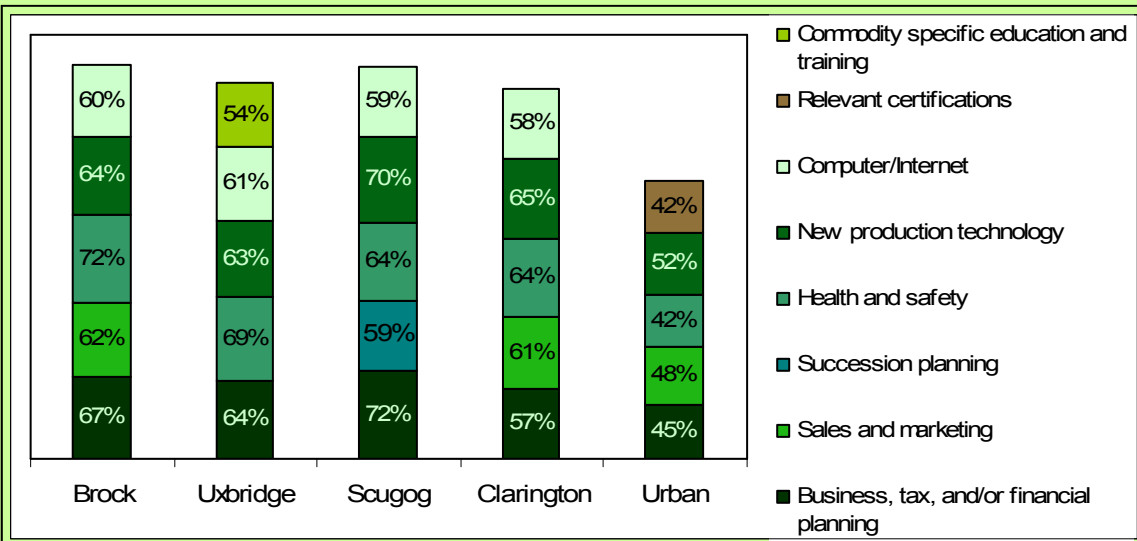


Figure 21: Primary areas of interest in education and training by percentage of farmers in each municipality

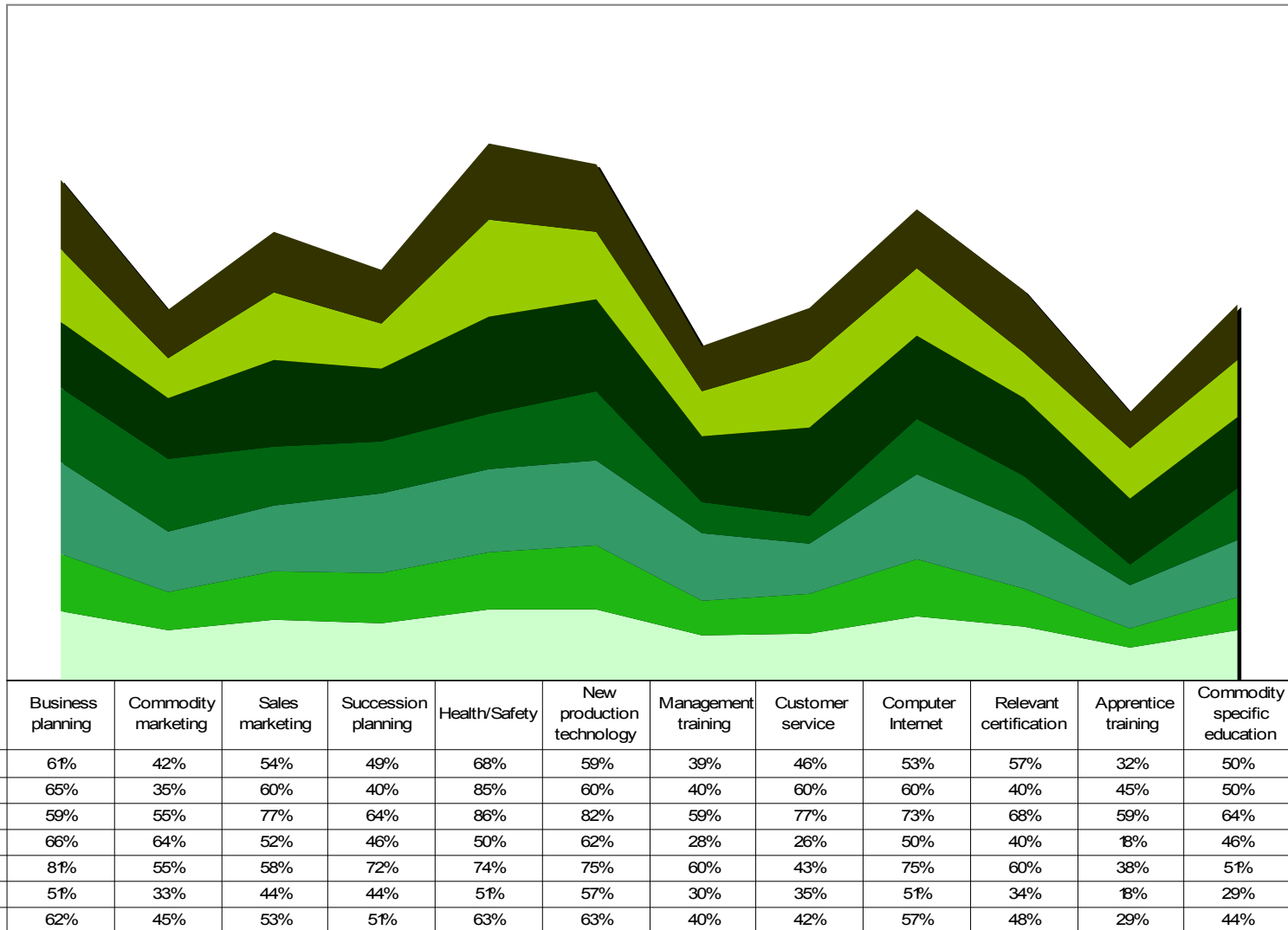


Figure 22: Training areas of interest by percentage of farmers in major commodity groups

Employer Education & Training

Barriers to Accessing Education and Training

Overall, 29% of farmers in Durham indicated that they face barriers to accessing education and training opportunities. Of the major commodity groups, fruit and vegetable, horse and pony, and dairy operators were most likely to face barriers to accessing opportunities. Those farms located in Brock and Scugog were more likely to face barriers than those farms located in the other municipalities.

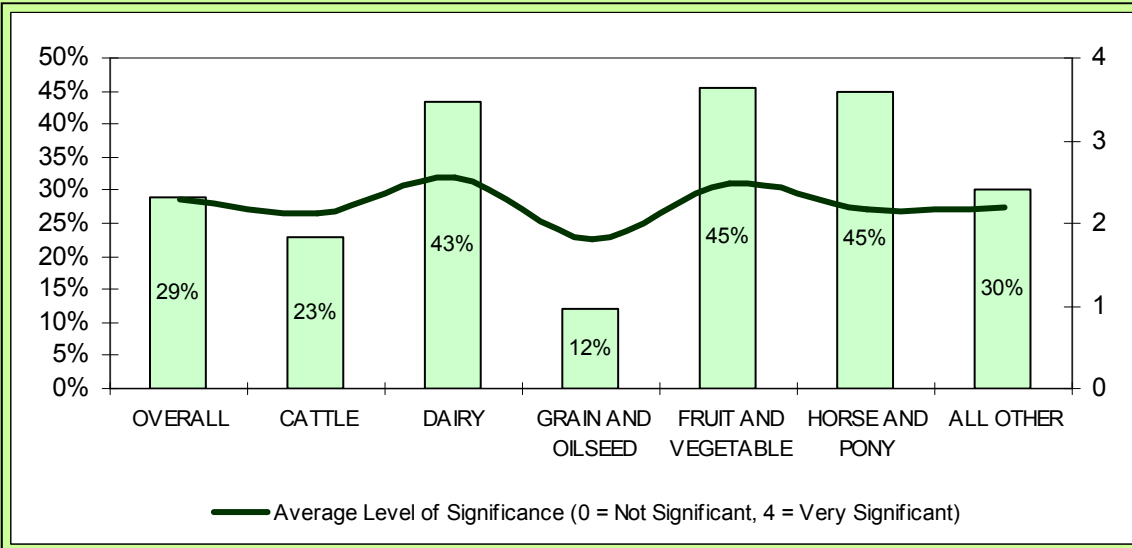


Figure 23: Percentage of farms facing barriers to accessing education and training opportunities and the overall level of significance of these barriers by major commodity group

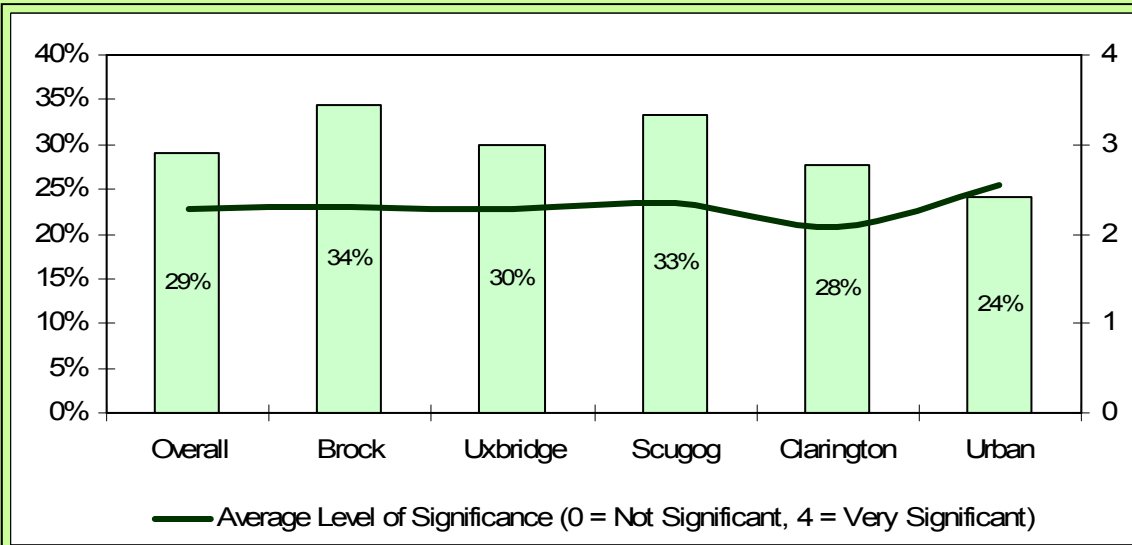


Figure 24: Percentage of farms facing barriers to accessing education and training opportunities and the overall level of significance of these barriers by municipality

Employer Education & Training

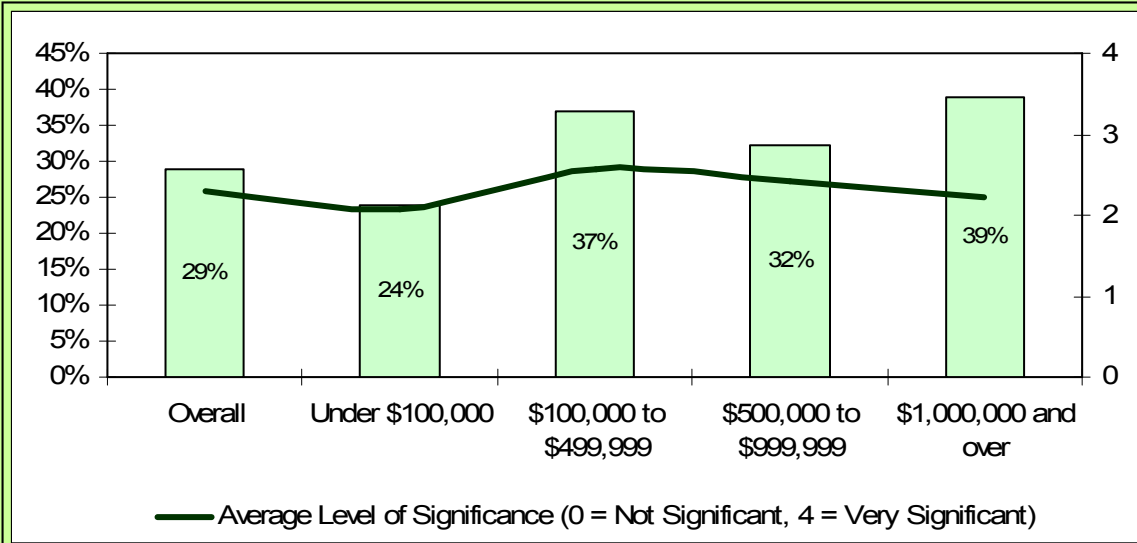


Figure 25: Percentage of farms facing barriers to accessing education and training opportunities and the overall level of significance of these barriers by 2006 gross farm receipts

Specific Barriers to Accessing Education and Training

The primary barriers to accessing education and training opportunities faced by farmers in Durham are:

1. The time commitment required to complete training
2. Training is offered at an inconvenient time of day and/or year
3. Appropriate training opportunities are not available locally
4. The cost of training is too high
5. Appropriate training opportunities are not available

These barriers are generally congruent across the major commodity groups with only a few major exceptions:

Both cattle farmers and fruit and vegetable operators listed the required educational prerequisites as a major barrier to accessing educational opportunities, while grain and oilseed producers listed certification requirements as a major barrier.

We see a similar pattern when we break down the farms by location, the results are congruent with the overall assessment of barriers, with only two notable exceptions:

Those operators located in Brock and Scugog both listed the required educational prerequisites as a major barrier to accessing opportunities, while those in Brock also listed certification requirements as a major barrier.

See tables 7 and 8 for a complete breakdown of the barriers to education and training experienced by farmers in the Region of Durham.

| | Overall | Cattle | Dairy | Grain & Oilseed | Fruit & Vegetable | Horse & Pony | All Other |
|---------------------------------------|---------|--------|-------|-----------------|-------------------|--------------|-----------|
| Training not available | 60% | 28% | 78% | 17% | 90% | 67% | 61% |
| Training not available locally | 74% | 72% | 96% | 17% | 80% | 67% | 65% |
| Time commitment required | 90% | 94% | 100% | 67% | 90% | 67% | 87% |
| Training offered at inconvenient time | 88% | 83% | 91% | 100% | 90% | 78% | 83% |
| Cost of training | 73% | 78% | 83% | 50% | 70% | 44% | 74% |
| Educational prerequisites | 49% | 56% | 43% | 33% | 70% | 33% | 48% |
| Certification requirements | 51% | 50% | 57% | 50% | 50% | 22% | 57% |
| Transportation | 34% | 28% | 43% | 33% | 40% | 22% | 30% |

Table 7: Specific barriers to accessing education and training opportunities by percentage of farms facing barriers in the major commodity groups

| | Overall | Brock | Uxbridge | Scugog | Clarington | Urban |
|---------------------------------------|------------|-------|----------|--------|------------|-------|
| Training not available | 60% | 60% | 70% | 57% | 40% | 75% |
| Training not available locally | 74% | 70% | 75% | 83% | 55% | 75% |
| Time commitment required | 90% | 80% | 85% | 96% | 85% | 88% |
| Training offered at inconvenient time | 88% | 95% | 80% | 100% | 65% | 75% |
| Cost of training | 73% | 75% | 65% | 70% | 70% | 75% |
| Educational prerequisites | 49% | 60% | 25% | 61% | 35% | 63% |
| Certification requirements | 51% | 60% | 55% | 43% | 35% | 63% |
| Transportation | 34% | 45% | 40% | 39% | 5% | 38% |

Table 8: Specific barriers to accessing education and training opportunities by percentage of farms facing barriers in each municipality

Notes

1. Based upon the respondents identification of the primary commodity produced by their operation. Further analysis in this report will be based upon these five commodity groups.
2. The remaining commodity groups identified in our sample are placed together under the heading "All Other." This includes poultry, hog, sheep and lamb, miscellaneous livestock, farm equipment and supply, egg, nursery product and sod, and other (primarily hay). This grouping will be maintained throughout the data report, unless otherwise noted.
3. Statistics Canada data does not include specific data on horse and pony operations, therefore, in this category no comparison could be made.
4. Throughout the remainder of the report the category "Urban" will be used to describe combined data from Oshawa, Whitby, Ajax and Pickering.

Appendix A: Survey Tool

Durham Region Agriculture Labour Market Survey

Part 1: Demographics

What is your age group?

- | | |
|---|--|
| (a) <input type="checkbox"/> 19 years and under | (d) <input type="checkbox"/> 40 – 49 years |
| (b) <input type="checkbox"/> 20 – 29 years | (e) <input type="checkbox"/> 50 – 59 years |
| (c) <input type="checkbox"/> 30 – 39 years | (f) <input type="checkbox"/> 60 + years |

Which of the following **best** describes your role in the agricultural industry?

- | | |
|---|--|
| (a) <input type="checkbox"/> Farm owner/operator | (d) <input type="checkbox"/> Farm/agribusiness employee without management responsibilities |
| (b) <input type="checkbox"/> Agribusiness owner/operator | |
| (c) <input type="checkbox"/> Farm/agribusiness employee with management responsibilities | |
- GO TO QUESTION # 24**

Part 2: Farm/Agribusiness Information

Where is your farm/agribusiness located?

- | | |
|---|--|
| (a) <input type="checkbox"/> Brock | (e) <input type="checkbox"/> Pickering |
| (b) <input type="checkbox"/> Uxbridge | (f) <input type="checkbox"/> Ajax |
| (c) <input type="checkbox"/> Scugog | (g) <input type="checkbox"/> Whitby |
| (d) <input type="checkbox"/> Clarington | (h) <input type="checkbox"/> Oshawa |

Please indicate what you consider to be the **primary** commodity and/or product of your farm/agricultural business. **(Please check only one)**

- | | |
|--|--|
| (a) <input type="checkbox"/> Cattle | (h) <input type="checkbox"/> Fruit and vegetable |
| (b) <input type="checkbox"/> Dairy | (i) <input type="checkbox"/> Egg |
| (c) <input type="checkbox"/> Poultry | (j) <input type="checkbox"/> Grain and oilseed |
| (d) <input type="checkbox"/> Hog | (k) <input type="checkbox"/> Horse and pony |
| (e) <input type="checkbox"/> Sheep and lamb | (l) <input type="checkbox"/> Nursery product and sod |
| (f) <input type="checkbox"/> Other livestock, specify: _____ | (m) <input type="checkbox"/> Other: _____ |
| (g) <input type="checkbox"/> Farm supply/equipment | |

What **other** commodities and/or agricultural products does your farm/agricultural business produce and/or sell? **(Please check all that apply)**

- | | |
|--|--|
| (a) <input type="checkbox"/> Cattle | (h) <input type="checkbox"/> Fruit and vegetable |
| (b) <input type="checkbox"/> Dairy | (i) <input type="checkbox"/> Egg |
| (c) <input type="checkbox"/> Poultry | (j) <input type="checkbox"/> Grain and oilseed |
| (d) <input type="checkbox"/> Hog | (k) <input type="checkbox"/> Horse and pony |
| (e) <input type="checkbox"/> Sheep and lamb | (l) <input type="checkbox"/> Nursery product and sod |
| (f) <input type="checkbox"/> Other livestock, specify: _____ | (m) <input type="checkbox"/> Other: _____ |
| (g) <input type="checkbox"/> Farm supply/equipment | |

What were the total gross receipts of your farm or business in **2005**?

- | | |
|--|--|
| (a) <input type="checkbox"/> Under \$100,000 | (c) <input type="checkbox"/> \$500,000 - \$999,999 |
| (b) <input type="checkbox"/> \$100,000 - \$499,999 | (d) <input type="checkbox"/> \$1,000,000 + |

Do you have access to a High Speed Internet connection?

- | | |
|----------------------------------|---------------------------------|
| (a) <input type="checkbox"/> Yes | (b) <input type="checkbox"/> No |
|----------------------------------|---------------------------------|

Part 3: Employee Recruitment and Retention

In **2005**, did you hire any **paid** employees for your farm or agribusiness? (Include custom operators, family members, students, and immigrant/offshore labourers)

- | | |
|----------------------------------|---------------------------------|
| (a) <input type="checkbox"/> Yes | (b) <input type="checkbox"/> No |
|----------------------------------|---------------------------------|
- GO TO QUESTION # 12**

What is the total number of **paid** employees that you hired in **2006**?

(a) Number: _____

Of these **paid** employees, how many fall into each of the following categories? (Include custom operators, family members, students, and immigrant/offshore labourers)

- (a) Seasonal, Part-time: _____ (c) Year-round, Part-time: _____
(b) Seasonal, Full-time: _____ (d) Year-round, Full-time: _____

Where have you found/recruited these **paid** employees? (Please check all that apply)

- (a) Informal Networks (friends, family, etc.) (e) Internet/Electronic Job Bank
(b) Government employment centre, please specify all: _____ (f) Staffing agency
(c) Newspaper Ads (g) Seasonal Agricultural Worker Program (SAWP)
(d) Agricultural College/University, please specify: _____ (h) Referrals, please specify: _____
(i) Other, please specify: _____

In **2007** do you intend to hire any **paid** employees for your farm or agribusiness? (Full-time, part-time, and/or seasonal)

- (a) Yes (b) No

GO TO QUESTION # 17

In **2007**, approximately how many **paid** employees do you anticipate hiring?

(a) Number: _____

How do you intend to recruit these **paid** employees?

- (a) Informal Networks (friends, family, etc.) (f) Staffing agency
(b) Government employment centre, please specify: _____ (g) Seasonal Agricultural Worker Program (SAWP)
(c) Newspaper Ads (h) Referrals, please specify: _____
(d) Agricultural College/University, please specify: _____ (i) Other, please specify: _____
(e) Internet/Electronic Job Bank

Do you anticipate hiring any students in 2007?

- (a) Yes (b) No

Do you anticipate hiring any immigrant/off-shore labourers in 2007?

- (a) Yes (b) No

Part 4: Availability of Skilled Labour

Do you have difficulty recruiting employees with the skills you need for your farm or agribusiness?

- (a) Yes (b) No

GO TO QUESTION # 22

What specific employee skills, knowledge or qualifications do you have difficulty recruiting for your farm or agribusiness?

| | Not difficult | Difficult | Very difficult | Not applicable |
|--|--------------------------|--------------------------|--------------------------|--------------------------|
| (a) Knowledge of farm regulations (e.g. health & safety, environmental) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (b) Skilled trades (e.g. farm equipment operator) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (c) Up-to-date technical/technological knowledge and experience (e.g. GPS, crop advisors, veterinarians) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (d) Customer service skills | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (e) Computer skills (e.g. bookkeeping) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (f) Up-to-date/relevant certifications (e.g. pesticide certifications) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (g) Custom operations (e.g. harvesting, farriers) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (h) Commodity specific knowledge and/or experience (e.g. relief milker, orchard pruner) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Are there **any other** employee skills, knowledge or qualifications that you require but have difficulty finding in the labour market?

What do you feel are the reasons for these difficulties in recruitment of employees? (Please rate each according to significance)

| Ability to: | Not a problem | A problem | A significant problem | Don't know |
|--|--------------------------|--------------------------|--------------------------|--------------------------|
| (a) Access a pool of general labour | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (b) Access a pool of labour with specialized skills | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (c) Provide competitive wages | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (d) Provide sufficient paid hours | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (e) Provide adequate employee training and education opportunities | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Are there **any other** problems affecting the recruitment and retention of employees for your farm or agribusiness?

Do you offer training for the employees at your farm or agribusiness?

(a) Yes, please describe below: (b) No

Do you pay for any or all costs of employee training and/or education (e.g. certification courses, technological upgrades, etc.)?

- (a) Yes (b) No

Part 5: Education and Training

Please **indicate your level of interest** in the following areas of education and training.

| | Not interested | Somewhat interested | Interested | Very interested |
|--|--------------------------|--------------------------|--------------------------|--------------------------|
| (a) Business, tax, and/or financial planning | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (b) Commodity marketing (e.g. forward contracting) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (c) Sales and marketing | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (d) Succession planning | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (e) Health and safety | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (f) New production technology | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (g) Management training | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (h) Customer service | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (i) Computer/Internet | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (j) Relevant certifications | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (k) Apprenticeship training | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (l) Commodity specific education & training, | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Are there **any other** training areas that are of interest to you?

Are there barriers to you accessing the education and training opportunities that you need to operate your business or do your job in the agricultural sector?

- (a) Yes (b) No

GO TO QUESTION # 29

Please **indicate the significance** of each of the following barriers to accessing education and training opportunities.

| | Not significant | Somewhat significant | Significant | Very significant |
|--|--------------------------|--------------------------|--------------------------|--------------------------|
| (a) Training not available | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (b) Training not available locally | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (c) Time commitment required | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (d) Training offered at inconvenient time of year or day | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (e) Cost of training | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (f) Educational prerequisites | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (h) Certification requirements | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| (i) Transportation | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Are there any other barriers that prevent you from accessing education and training opportunities?

Please provide any additional comments on training and employment.

Thank you for taking the time to complete this survey, your answers are very important to us.

Please return this survey to the Community Development Council Durham in the pre-paid addressed envelope enclosed with the questionnaire before February 2, 2007.

If you have any questions please feel free to contact **Stephanie Zibert** from Durham College at **(905) 852 – 7848**, Ext. 36, or via email at **stephanie.zibert@durhamcollege.ca**

Thank you again for taking the time to complete this survey.

Appendix B: Internet Access Report (July 2007)

Durham Agricultural Labour Market Survey

Data Summary

Internet Access in the Durham Agriculture Community

Prepared by: Benjamin Earle

SUMMARY

The results of the Durham Agricultural Labour Market Survey indicate a significant lack of internet access in rural communities in Durham. Farmers simply do not have access to an internet connection, or do not have access to an up-to-date high speed connection. Our research shows that only 30% of all farms in Durham have adequate internet access, compared to 57% of the population overall. The vast majority of these are not high-speed, broadband connections, which significantly impairs access to state-of-the-art online content.

Our survey indicates that those farms with broadband access were significantly more likely to hire paid employees for their operations. Those without access were more likely to report difficulty in recruiting the employee skills that their farm operations required.

Interestingly, those farmers without broadband access were more interested in computer and internet training than those with access. Many farmers expressed concern over the availability of education and training opportunities locally, indicating that this was a significant barrier to access. Increased internet capabilities could significantly improve access to online training opportunities.

DATA

29.18% of farms reported having access to an internet connection. The highest level of access in the rural municipalities occurs in Brock (37.93%), followed by Scugog (30.43%), Clarington (27.78%), and Uxbridge (28.87%). Only 24.24% of farms in the Region's urban municipalities reported having access to a high speed internet connection.

64.00% of farms with internet access hired paid employees in 2008, compared to 54.10% of farms without internet access. Further, 50.60% of farms with internet access intend to hire paid employees in 2007, compared to 48.8% of farms without internet access.

Respondents with internet access are more likely to hire students and immigrant workers.

35.27% of respondents without internet access indicated that they had difficulty recruiting the employee skills that they require for their farm or agribusiness.

57.49% of respondents without internet access were interested in computer and Internet training opportunities, with 34.30% being very interested.

42.99% of farmers indicated that availability was a significant barrier to them accessing the education and training opportunities that they require.