



CANADIAN AGRICULTURAL
HUMAN RESOURCE COUNCIL

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RESSOURCES HUMAINES EN AGRICULTURE

Labour Market Information Research on Recruitment and Retention

R.A. Malatest & Associates Ltd.
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Overview of Research

A range of activities were involved in this project:

- Identify and review publicly available statistics and documents
- Conducted 50 interviews with key leaders in the sector
- Conducted survey with 552 employers in the agriculture sector with revenues of \$100,000 or more
- Completed a 2- and 5-year labour demand forecast
- Conducted case studies



Breakdown by Commodity Group

- Research findings have been presented by major commodity groupings:
 - Livestock, Poultry and Other Animal
 - Grains and Oilseeds
 - Berries, Vegetables, Tree Fruit and Vine
 - Greenhouse, Nursery, Landscape and Floriculture
 - Aquaculture
 - Other and Non-traditional



Breakdown by Occupational Group

- Report on key occupations as well as trades/technical occupations as follows:
 - Technical/Specialist Staff
 - Machinery mechanic and operators
 - Supervisors and managers
 - General farm workers
 - Landscapers
 - Aquaculture workers
 - Other workers



Regional Breakdown

- Regions are defined as follows:
 - British Columbia
 - Prairies (Alberta, Saskatchewan, Manitoba)
 - Ontario
 - Québec
 - Atlantic (Prince Edward Island, Nova Scotia, New Brunswick, Newfoundland and Labrador)



Estimating Agricultural Employment in Canada - An Overview

- Employment and labour market data for Canada's agricultural sector is limited
- The study utilizes the Labour Force Survey (Statistics Canada monthly survey and other data sources) to develop an estimate of the total employment in all farm types across Canada
- Other data sources reviewed to develop employment estimates include:
 - 2001 and 2006 Census of Agriculture (limited employment data)
 - 2006 Census of Canada
 - SAWP data
 - Province of Québec Census



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Agricultural Employment in Canada - 2001-2008 (000s) – LFS

	Atlantic	Québec	Ontario	Prairies	BC	Canada
2001	18.0	56.6	83.7	139.3	25.5	323.3
2002	19.0	61.6	76.7	141.1	29.0	325.4
2003	17.5	57.0	81.5	143.5	32.9	332.4
2004	17.1	50.1	78.9	142.9	37.0	326.0
2005	18.3	60.8	93.1	132.8	38.7	343.7
2006	16.7	65.1	100.4	129.6	34.7	346.4
2007	16.7	65.3	96.1	122.9	36.2	337.2
2008	16.1	70.6	81.2	131.6	36.8	336.2
% change (2000-2008)	-11%	+25%	-3%	-6%	+44%	+4%

Source: Labour Force Survey, custom data request, Table 3701 – Includes F/T or P/T workers



Labour Force Survey – Coverage Issues

- LFS may underestimate Temporary Foreign Workers (including Seasonal Agricultural Workers – SAWP) although TFW's are not specifically excluded from the Labour Force Survey
- Data coverage issues – only 54,000 households in Canada comprise the sample
- Agricultural workers, especially the harvest workforce, may be less likely to participate in telephone-based data collection



Other Data Sources

- Province of Québec conducted its own census of farm operations (in 2003)
- Data indicates that the number of workers reported in 2003 (127,960) was much higher than that of the LFS (57,000)
- Québec census may overestimate number whose main job was agriculture.
For example:
 - 44,822 were primary farm operators
 - 9,698 were spouses
 - 20,034 were children (over the age of 14)
 - 18,036 paid workers who worked less than 5 weeks
- Québec government uses LFS for estimates of agricultural employment



What Data Source Have We Used?

- Due to limitations with data collected from other sources (Québec, Census of Agriculture), the LFS has been retained as the primary estimate of Canadian agricultural employment
- However, it is likely that the LFS underestimates agricultural employment
 - difficulty in enumerating seasonal or harvest workers
 - Temporary foreign workers would be difficult to enumerate

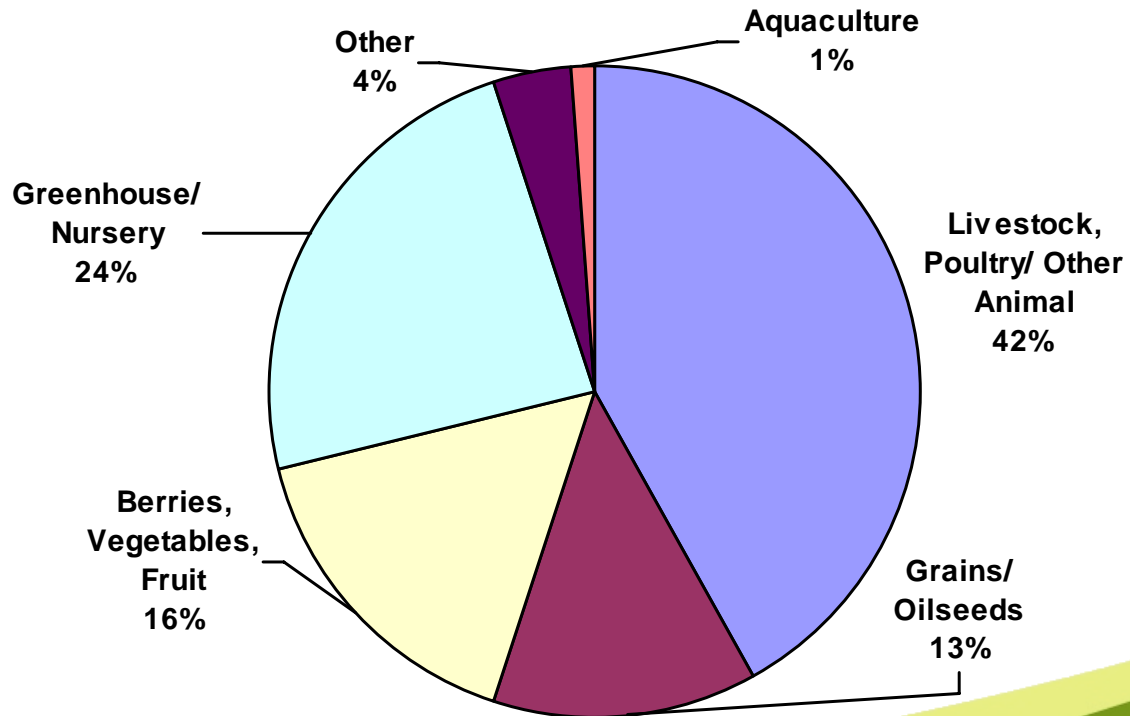


Distribution of Agricultural Employment by Major Commodity Group

- Data from Canada Revenue Agency accessed to establish wages and salaries paid by farm type (2006 data)
- Based on wages and salaries paid, it was possible to estimate employment by major commodity group
- Includes both farm owner operators and paid employees



Distribution of Agricultural Employment by Major Commodity Group – continued



Source: Based on wages/salaries paid by commodity type. Aquaculture data computed from wages and salaries paid in the sector. Table 5.1, and Table 5-2 Cat. 21-208-X



Agricultural Employment in Canada – What do we know?

- Labour Force Survey suggests that the total agricultural workforce in 2008 was 336,200 (all farm sizes)
- Data is not available by/for:
 - Occupational group
 - Farm commodity group
 - By size of farm (farm receipts)
 - No data exists on current vacancies
 - Forecast data not available
- The 336,200 includes individuals who own/operate a small farm with no employees; employment on farms with \$100,000+ in receipts estimated to be 244,500
- LFS may underestimate actual employment

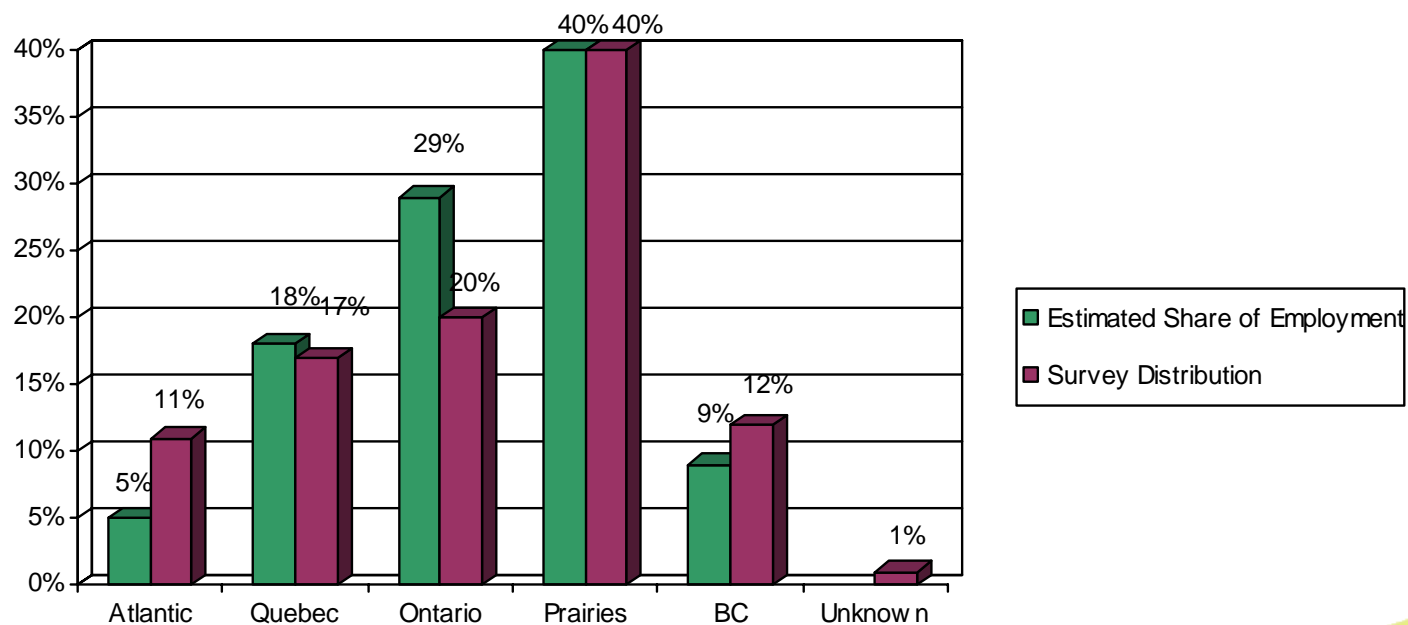


Reasons for the Employer Survey

- To provide an overview of likely employment in the \$100,000+ sector (i.e., farms with more than \$100,000 in receipts and likely to hire workers – have a need for “human resource strategy”)
- To provide insight as to employment requirements by farm type/major occupational group/vacancies/likely employment requirements
- To provide insight as to human resource issues/current HR practices



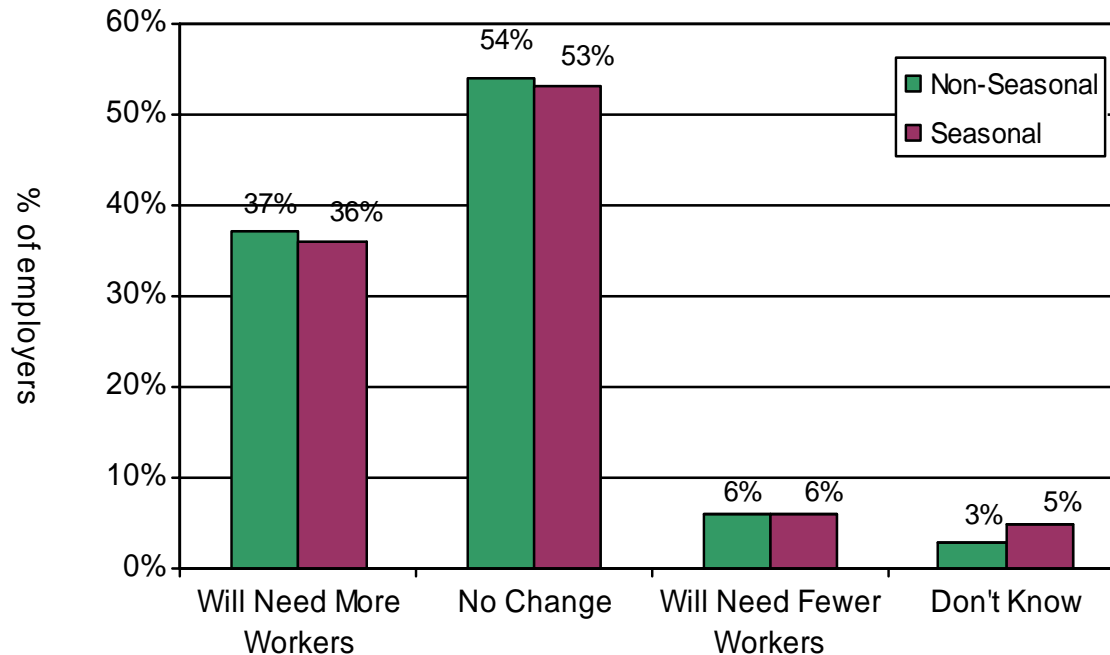
Representativeness of the Survey Sample By Region



Source: Table 1-4, Report



Employer Perspectives on Workforce Requirements Over the Next Two Years

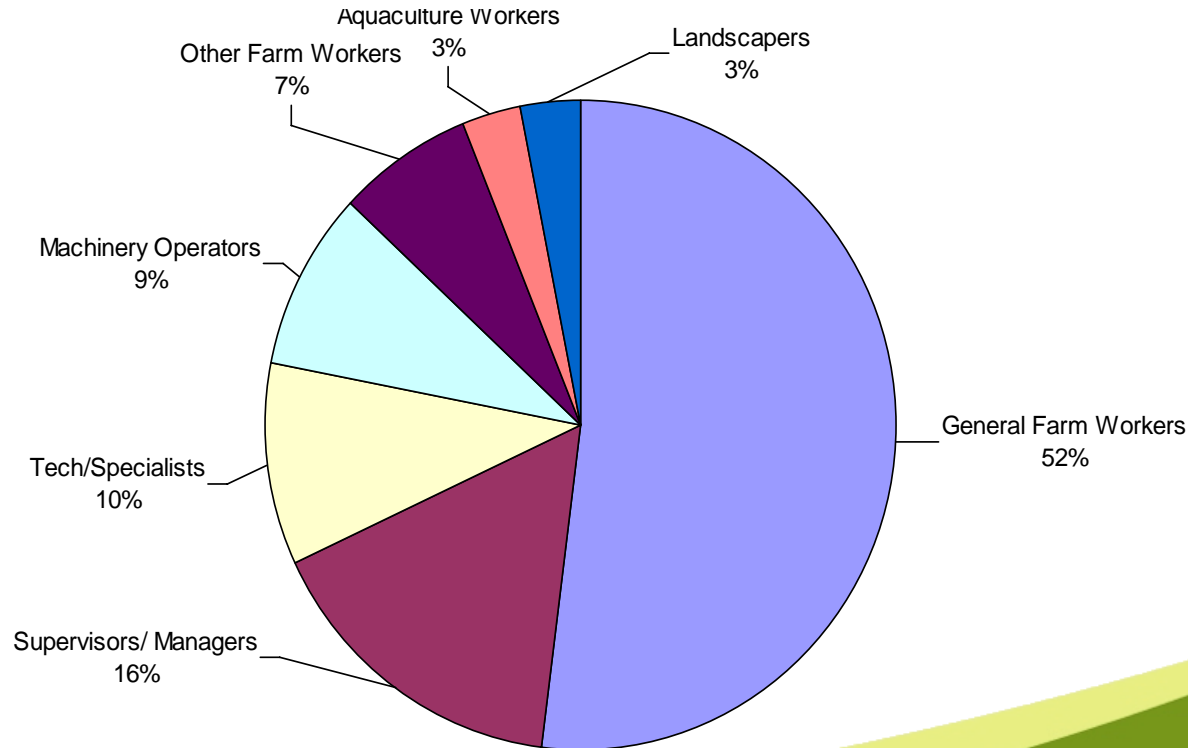


n=505 for Non-Seasonal Worker Respondents, 386 for Seasonal Worker Requirements

Source: Employer Survey, QA6a, QA7a



Employment by Major Occupational Group (Non-Seasonal)



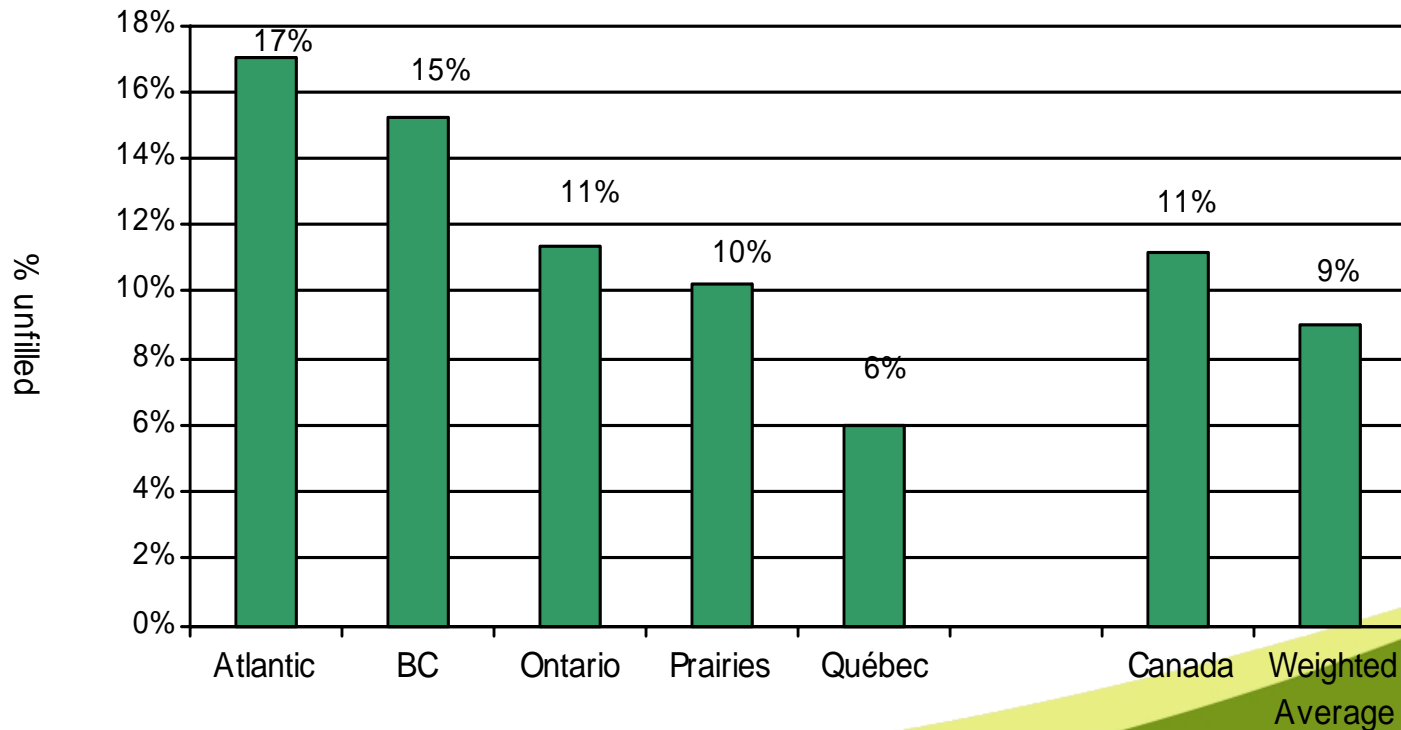
Note: Employers surveyed collectively employed more than 12,300 workers

Source: Employer Survey, QA6b; n=505

Note: Totals may not add to 100% due to rounding



Vacancy Rates by Region % Unfilled as a Proportion of Current Employment plus Unfilled Positions (2008) Non-Seasonal Positions

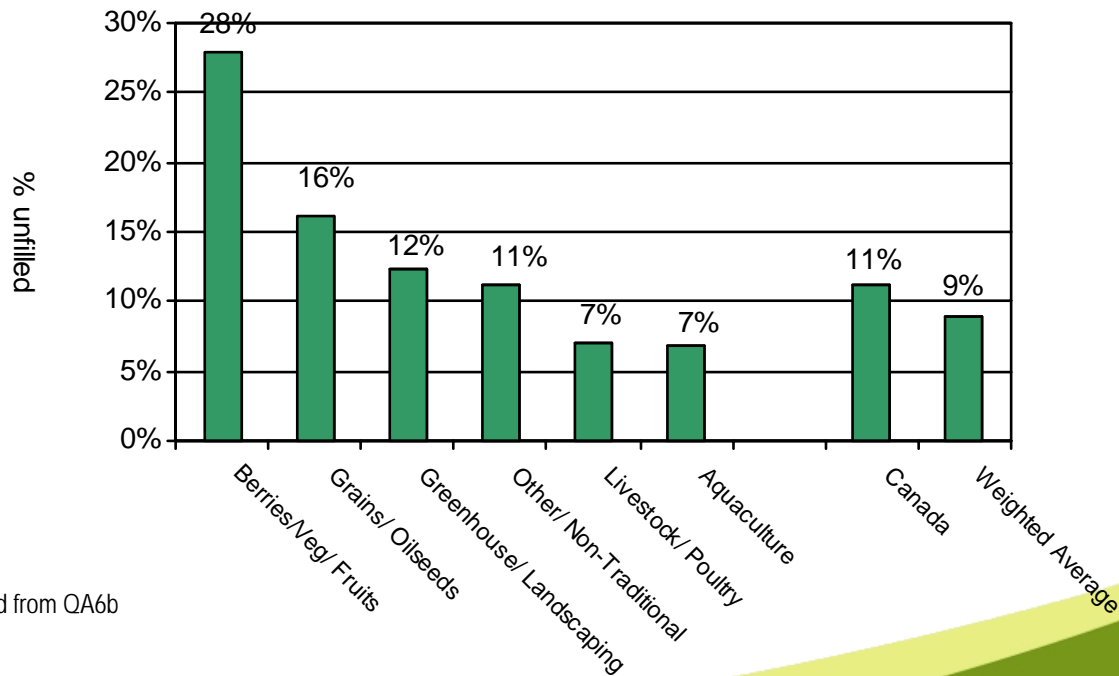


n=525

Source: Employer Survey, Computed from QA6b



Vacancy Rates by Major Commodity Group % Unfilled as a Proportion of Current Employment plus Unfilled Positions (2008) Non-Seasonal Positions



n=505

Source: Employer Survey, Computed from QA6b

Vacancy rates varied by commodity group with the highest in Berries, Vegetable and Tree Fruits and the lowest in Aquaculture (% unfilled as a proportion of current & unfilled).

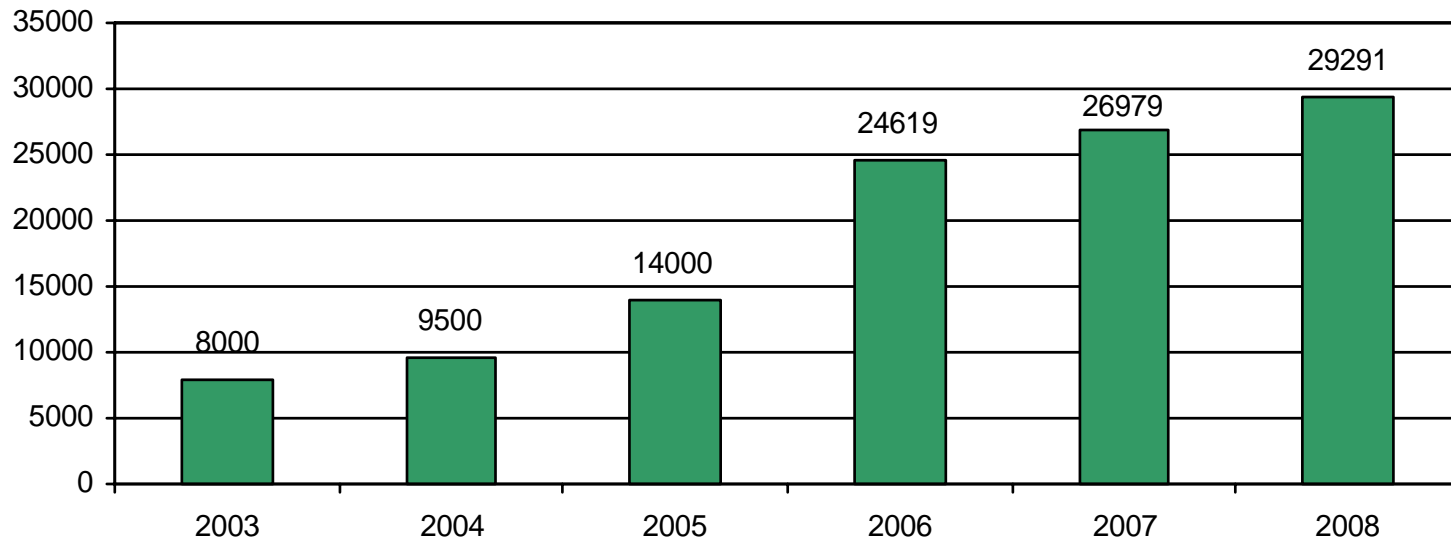


Vacancy Rate in Canada's Agricultural Sector is High

- Study indicates that the vacancy rate in the Agriculture sector is 9% (weighted on the basis of regional employment)
- Other vacancy data suggests that the vacancy rate is very high
 - 1999 StatsCan study indicates a vacancy rate of 2.7% (all industries)
 - CFIB member survey suggests a vacancy rate of 4.5% in 2002 (all industries)
 - vacancy rate is higher than that for other sectors (Electricity – 3.2% in 2007, Automobile – 5.8% in 2005)
 - Increasing use of SAWP suggests high vacancy rates



Number of SAWP Workers in Canada (2003-2008)



Source: Foreign Agricultural Resource Management Services (FARMS) Ontario; Fondation des Entreprises en Recrutement de main-d'oeuvre Agricole Étiangère, Quebec; CR Farms, Prairies; Western Agriculture Labour Initiative, BC

Increase in SAWP Workers in Canada suggests high vacancy rates



Estimated Labour Gap – Canada's Non-Seasonal Workforce by Major Occupational Group

Group	Current Workforce (est)	Current Estimated Vacancies (est)	Next 2 Years (2010)	Next 5 Years (2013)	Total Requirements 2008-2013
Canada	244,500	25,590	269,045	295,425	+50,925
Tech/Specialists	24,270	2,225	26,715	27,070	+2,800
Machinery Mechanics and Operators	22,220	3,020	25,370	30,810	+8,590
Supervisors/Managers	38,320	2,700	39,900	42,415	+4,095
Landscapers	6,660	1,990	10,740	12,950	+6,290
Aquaculture Workers	7,810	360	8,165	8,435	++625
General Farm Workers	128,885	14,075	140,340	154,675	+25,790
Other Workers	16,335	1,220	17,815	19,070	+2,735

Note: Occupational distribution based on Employer responses. Data may or may not align with other occupational data sources, including LFS and/or 2006 Census, due to focus on large farms only.



Estimated Labour Gap – Canada's Non-Seasonal Workforce by Region

Region	Current Workforce (2008)	Current Estimated Vacancies	Workforce Requirements 2010	Workforce Requirements 2013	Total Requirements 2008-2013
Canada (1)	244,500	25,590	269,045	295,425	+50,925
Atlantic	11,500	1,950	13,450	14,675	+3,175
Quebec	43,800	2,440	44,960	50,580	+6,780
Ontario	70,650	8,050	76,350	85,250	+14,600
Prairies	97,550	9,950	110,945	119,720	+22,170
BC	21,000	3,200	23,340	25,200	+4,200

Note: Employment requirements for farms with \$100,000+ in receipts

Source: Employer Survey, QA6b, RAM Estimate

(1) Sum of regional requirements



Estimated Labour Gap – Seasonal Workforce by Region

Region	Estimated Seasonal Workforce ⁽¹⁾	Vacancy Rate	Current Estimated Vacancies	Workforce Requirements 2010	Workforce Requirements 2013	Total Requirements 2008-2013
Canada ⁽²⁾	81,940	17%	16,560	107,615	120,795	+38,855
Atlantic	6,050	32%	1,920	7,610	7,720	+1,670
Quebec	14,955	15%	2,205	19,150	23,950	+8,995
Ontario	29,080	12%	3,585	32,985	37,220	+8,145
Prairies	21,275	22%	4,600	29,740	33,180	+11,900
BC	10,580	40%	4,250	18,140	18,720	+8,140

⁽¹⁾ Based on the proportion of seasonal to non-seasonal workers indicated on the survey. It should be noted that positions would not be full-time full year positions.

⁽²⁾ Based on the sum of requirements for each region.

Source: Employer Survey, QA7b

n=386 employers (Note: Not all employers provided data as to future requirements)



Summary of Agriculture Labour Requirements

- Almost all (80%) employers surveyed had one or more vacancies for either a seasonal (23% vacancy) or non-seasonal positions (9% vacancy rate on regionally weighted basis).
- Extrapolating survey results to farms with \$100,000+ in receipts brings estimates of 25,590 current vacant positions for non-seasonal workers and 16,560 vacancies for seasonal workers.
- Almost 40% of employers felt they would need more workers in the next two years as compared to 6% who felt they would employ fewer employees.



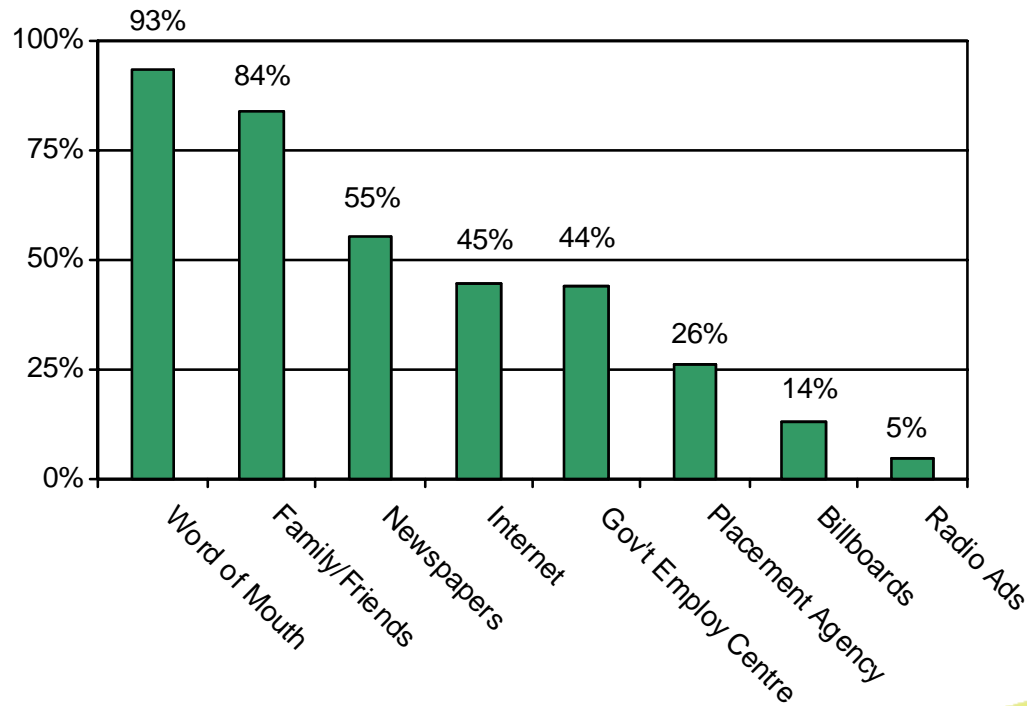
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Recruitment



Methods Used to Recruit Employees

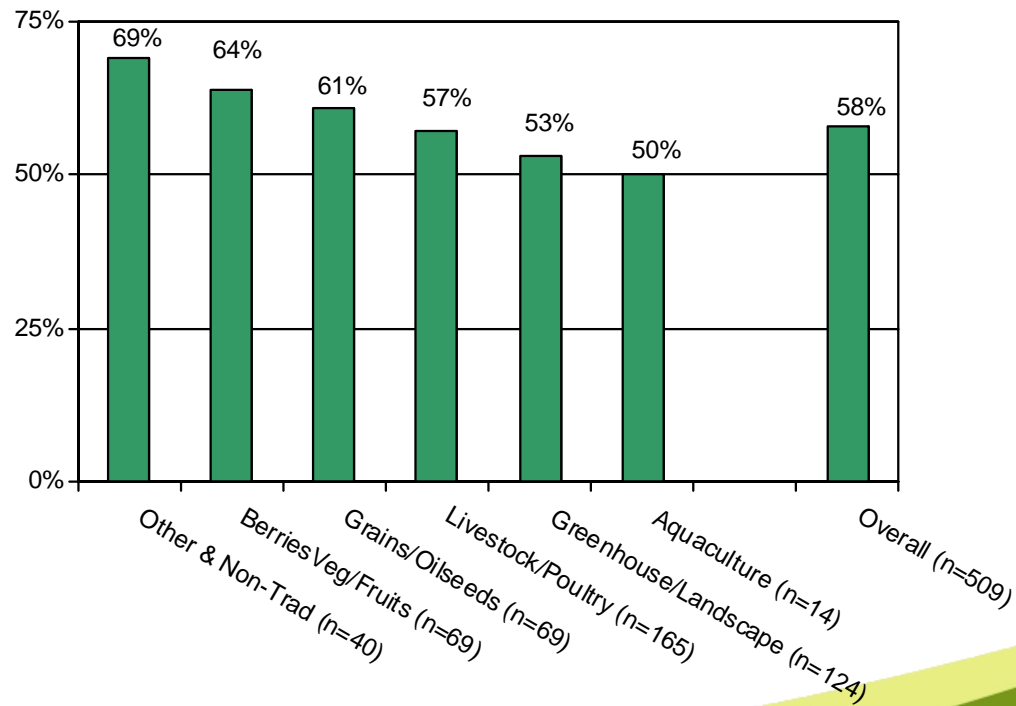


n=481

Source: Employer Survey, QB1

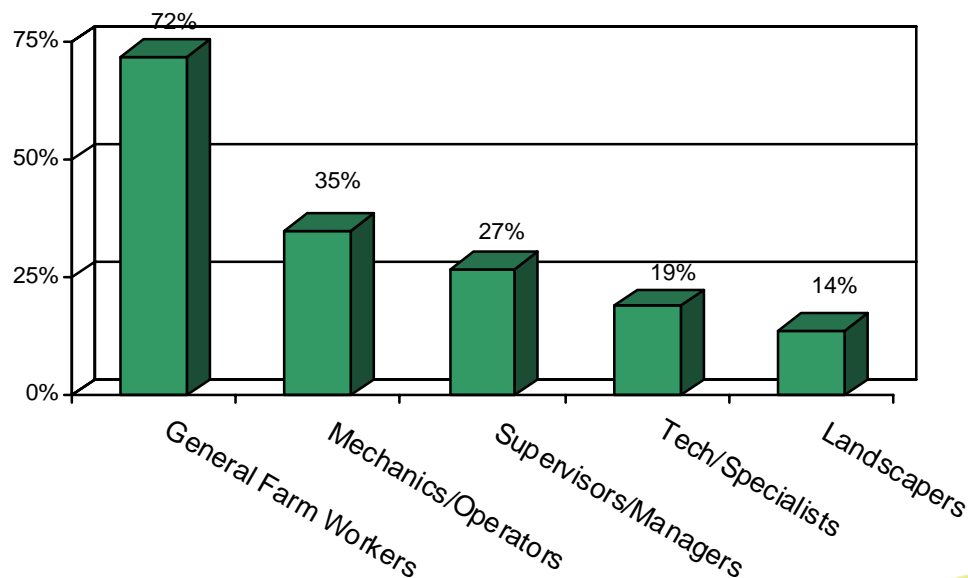


Difficulties Recruiting Employees by Commodity





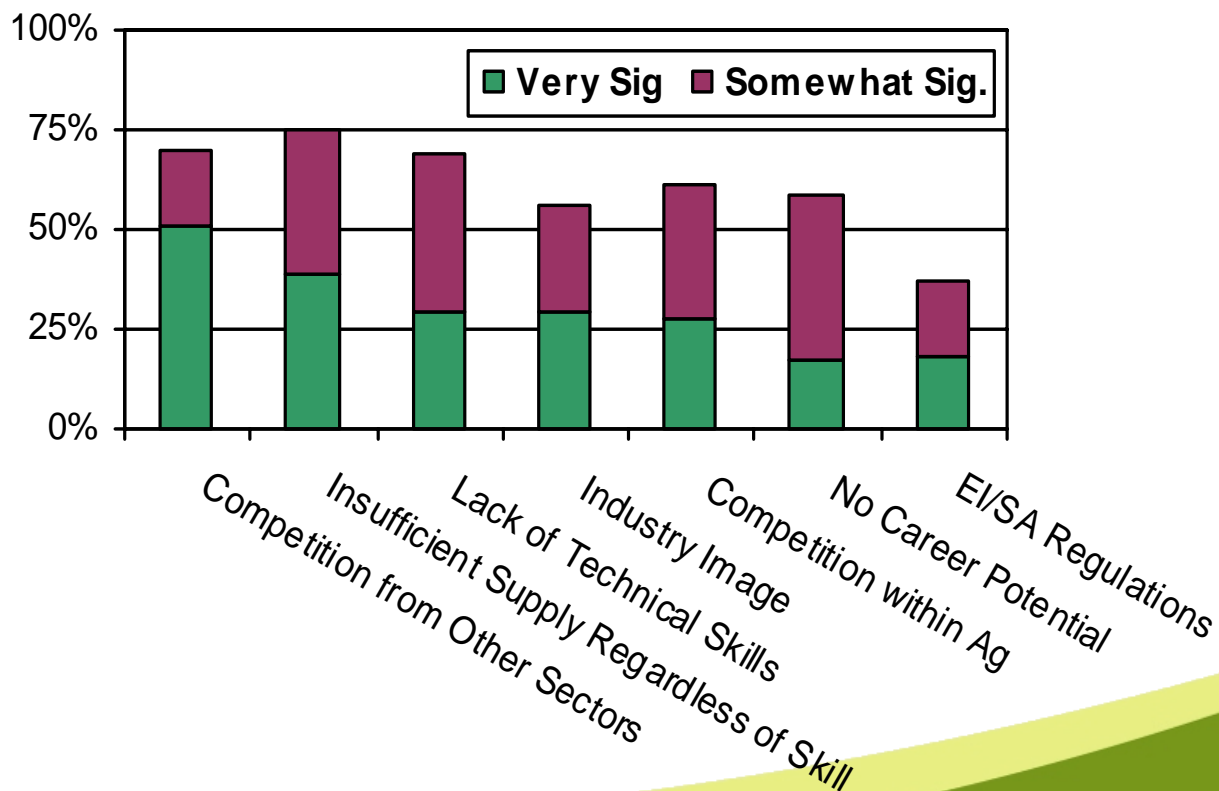
Positions Difficult to Fill by Occupational Category (% of employers citing difficulty in filling positions)



Source: Employer Survey, QB2b; n=303 to 312 Multiple response question; Respondents are only those who had difficulty recruiting new employees.



Barriers to Hiring Employees



Source: Employer Survey, QB3; n=535



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Retention



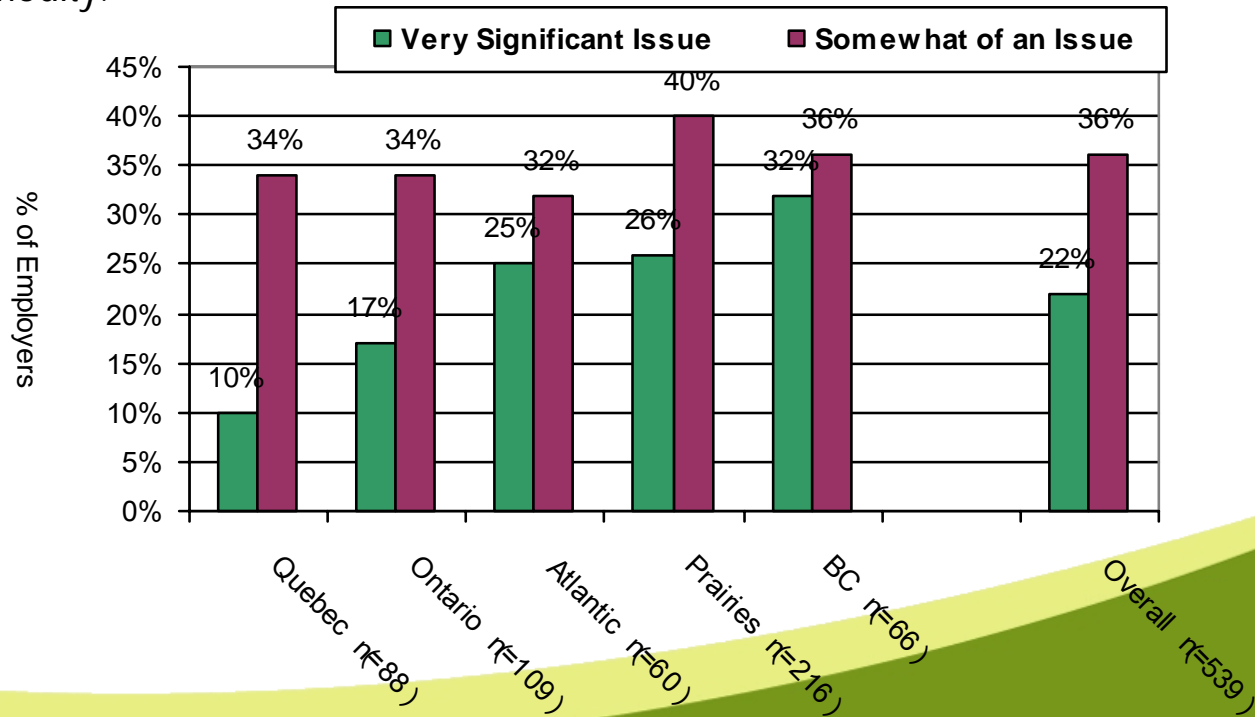
Human Resource Planning

- Approximately one-quarter of respondents identified having a human resource plan and this was fairly consistent across provinces.
- Only one-quarter of those with an HR plan had a HR department or held regular HR meetings.
- Approximately 78% of those with a HR plan (19% of employers overall) reported engaging in activities usually carried out by someone in HR:
 - Development of action plan based on budget and growth
 - Having HR processes and policies eg. Vacation,
 - Having training programs
 - Employee retention processes (e.g., health & benefits pkge, internal training and certification)



Employee Turnover

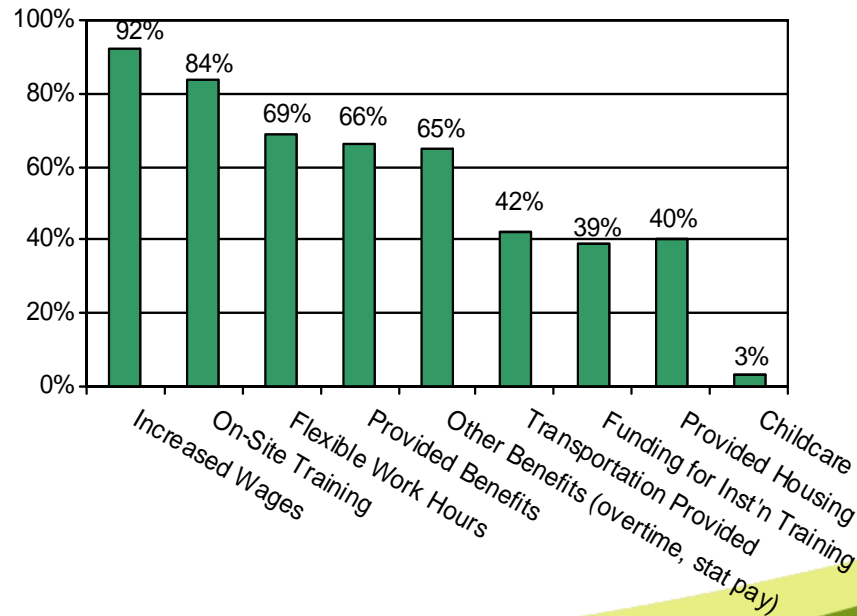
- Staff turnover was identified as a 'very significant' issue for 22% of employers, 36% somewhat of an issue and 41% not an issue at all (n=539) but varied by region and commodity.





Steps Taken to Attract and Retain Employees

- 63% of employers had taken steps to attract & retain employees



n=355

Source: Employer Survey, OC3a

Note: Totals do not add to 100% due to multiple response.



HR Strategies Identified by Key Informants and Employers

Issue	Key Informants			Employers		
	Somewhat Important	Very Important	Combined	Somewhat Important	Very Important	Combined
Developing marketing / promotional campaign	44%	50%	94%	34%	40%	74%
Establishing sector benefit program	46%	42%	88%	38%	40%	78%
Develop HR management training programs	30%	56%	86%	n/a	n/a	n/a
Strategy to target non-traditional workers	32%	52%	84%	37%	33%	70%



Key Findings

- Measuring Canada's agricultural workforce by region and by commodity is difficult
- National vacancy rate is high - estimated at 9%
- Employers expect to need more employees in the future
- TFW and SAWP are not meeting labour demands
- Current immigration policies deter and are less than encouraging in attracting new workers
- The sector has room to further enhance recruitment and retention capability



Recommended Areas for Action

1. **Improve Labour Market Information for the agriculture sector**

2. **Develop Strategies to increase supply of workers to the sector as well as enhance the Human Resource tools, programs, and practices in the sector**
 - a. **Image/Attraction/Recruitment**
 - b. **Policies**



Area #1 - Improving Labour Market Information for the Sector

1.1 Improve Data Collection on the Agriculture Sector

- Need to improve information about the size of the workforce, current vacancies and future requirements
- Could be special study or changes to existing surveys

1.2 Encourage Special Studies to Address Sector Labour Market Information Requirements

- Due to the complexity of the agricultural labour market, work with StatsCan to complete specific research on LMI issues for this sector



Area #2 - Action Items to Increase the Supply of Workers to the Agricultural Sector

- 2.1 Share Information on Vacancy Rates to Support Maintenance/Expansion of supply-side policies designed to increase the number of agricultural workers in Canada**
 - Consider expansion of Temporary Foreign Worker (TFW) (SAWP, other) to meet sector needs & are not meeting labour demands
 - Develop factsheets on labour projections and provide to national farm organizations and commodity groups
- 2.2 Meet with Citizenship and Immigration Canada to present research findings and discuss the implications**



Area #2 - Action Items to Increase the Supply of Workers to the Agricultural Sector

2.3 Examine the Feasibility of Implementing Changes to EI/SA Regulations

- Reduce/eliminate EI/SA restrictions to enable such workers to accept seasonal/temporary employment without penalty



Area #2 - Action Items to Increase the Supply of Workers to the Agricultural Sector– con't

2.4 Market the Sector to New Prospects - Students

- Initiatives/action items to provide career information to youth
- Prepare promotional material for key "influence agents"

2.5 Improve the Sector's Image

- Actions/initiatives to improve the image of the sector.
- Enhanced image could help with efforts to attract/recruit individuals to the sector



Area #3 - Enhancing Human Resource Practices in the Sector

3.1 Explore the Feasibility of Developing / Supporting HR Management Training for the sector

- High turnover and vacancy rates suggest there is scope to enhance HR practices in the sector
- Sector Council could play a role in the design/development of HR tools/other resources

3.2 Explore the Need to Develop Additional HR Tools to Support the Sector

- For example:
 - Process factsheet on accessing foreign workers
 - Job description templates, interview questions, compensation surveys



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For further information, please contact:

Canadian Agricultural Human Resource Council

Danielle Vinette, Executive Director

613-745-7457 ext 222

vinette@cahrc-ccrha.ca

Jean Sullivan, Project Manager,

T: 613-745-7457 ext 223

sullivan@cahrc-ccrha.ca

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