CANADIAN AGRICULTURAL HUMAN RESOURCE COUNCIL

CONSEIL CANADIEN POUR LES RESSOURCES HUMAINES EN AGRICULTURE

Labour Market Information Research on Recruitment and Retention

June 2009

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Project Objectives

- Develop comprehensive, analytical report detailing labour requirements, gaps and needs on a regional and commodity basis

- Outline practices in agriculture recruitment and retention

Expected Results

- Illustrate nature and scope of HR challenges within the agriculture sector
- Provide baseline data to enable CAHRC to develop recruitment and retention strategies
- Provide a five-year projection of HR needs in the agricultural workforce

Deliverables

- Labour Market Information on Recruitment and Retention Report including a 2-5 year labour projection
- Farm Profiles – recruiting and retention practices for each profile farm, plus a summative report of all thirteen farms
- National LMI Forum – February 2009
- LMI Fact Sheet
- Consultations with Provincial and Federal government stakeholders

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Advisory Group

- **Paul LeBlanc**, Agricultural Alliance of New Brunswick
- **Christine Koch**, Acting Executive Director, British Columbia Agriculture Council
- **David Rolfe**, President, Keystone Agricultural Producers, Owner, Leverton Farms
- **Doug Connery**, Owner, Connery's Riverdale Farms Ltd., Human Resource Chair, Canadian Horticultural Council
- **Hélène Varvaressos**, Executive Director, AGRIcarrières

Advisory Group

Observers:

- Shelly Binch, Sector Council Program, HRSDC
- Gen LeBlanc, Sector Council Program, HRSDC
- Benoit Julien, Policy Analyst, AAFC

Staff :

- Danielle Vinette, Executive Director
- Jean Sullivan, Project Manager
- Cindy Kosloski, Project Coordinator

Overview of Research

A range of activities were involved in this project:

- Identify and review publicly available statistics and documents
- 50 key informant interviews with key leaders in the sector
- Employer survey with 552 farm employers
- Calculated a 2- and 5-year labour demand projection
- Farm Profiles on recruitment and retention
- National LMI Forum

Breakdown by Commodity Group

Research findings have been presented by major commodity groupings:

- Livestock and Poultry
- Crops
- 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)

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Estimating Agricultural Employment in Canada

An Overview

- Employment and labour market data for Canada's agricultural sector is limited
- The study uses 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

Labour Force Survey – Coverage Issues

- LFS may underestimate temporary foreign workers although TFW's are not specifically excluded from the Labour Force Survey
- 54,000 households in Canada comprise the sample
- Agricultural workers, especially the harvest workforce, may be less accessible and therefore less likely to participate

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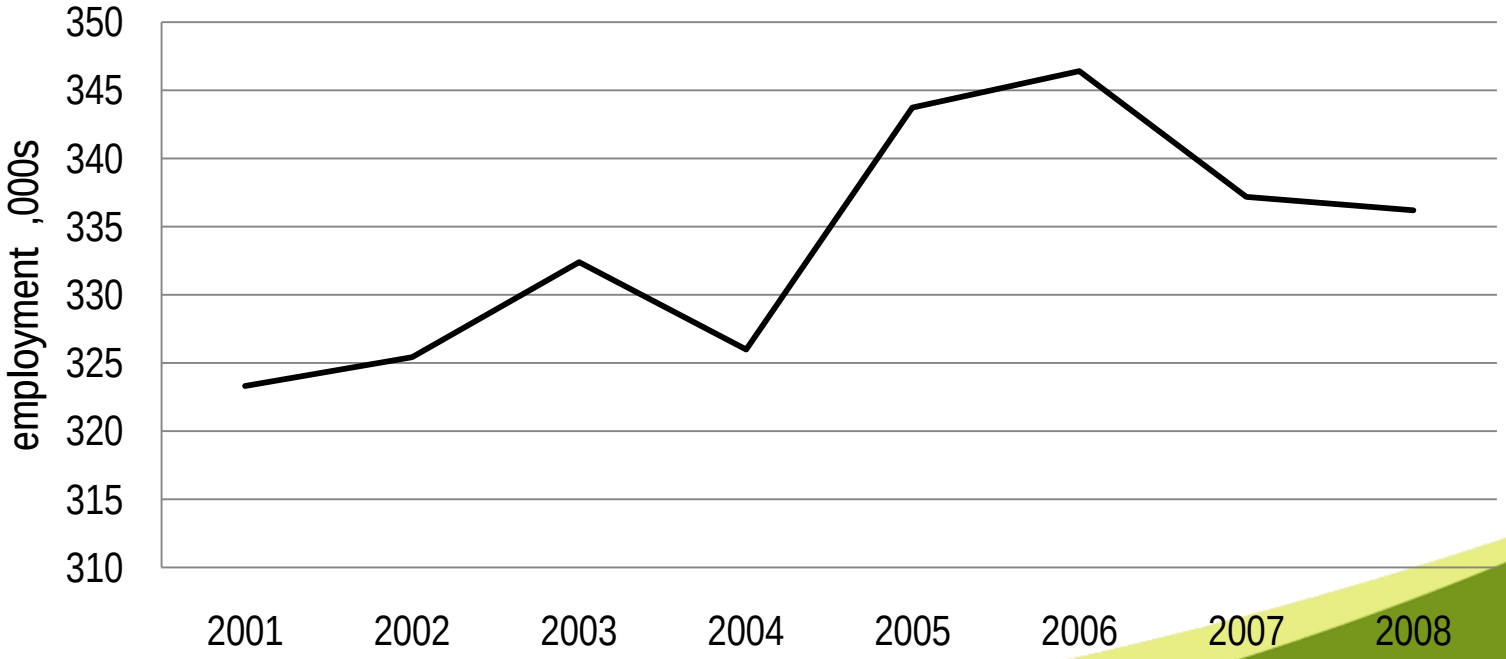
Agricultural Employment in Canada ('000s)



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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

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

Québec Census

- 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)
- Data includes:
  - 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
  - 35,370 were paid workers who worked 5 weeks or more in 2003
- Québec government uses LFS for estimates of agricultural employment

What Data Source Have We Used?

- LFS has been used as the primary estimate of Canadian agricultural employment
- However, the LFS may underestimate 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

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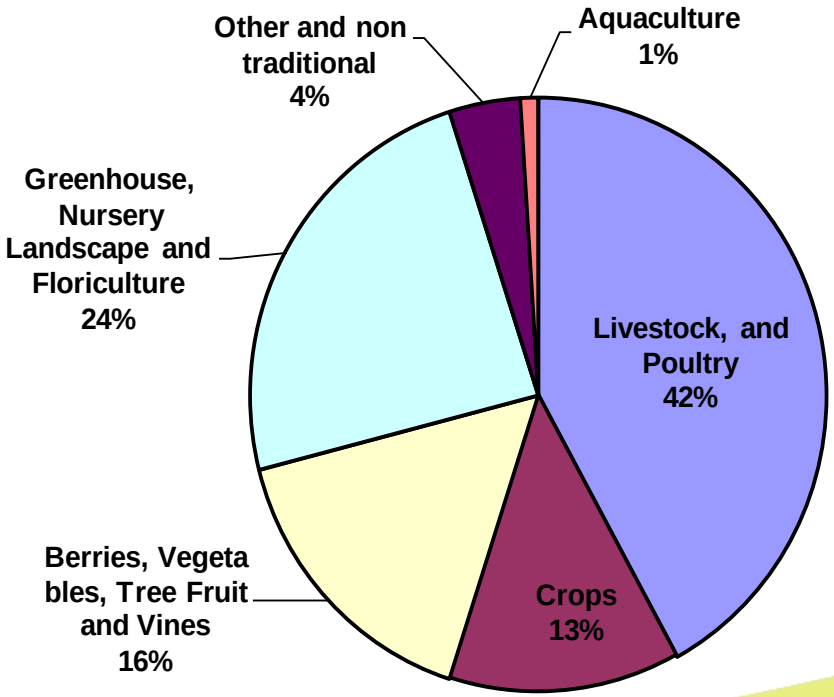
Distribution of Agricultural Employment by Major Commodity Group



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 groups
  - Farm commodity group (other than livestock, crop and mixed)
  - 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

The Employer Survey

- To fill in some of the gaps identified CAHRC surveyed farmers of operations of more than $100,000 in receipts
- 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

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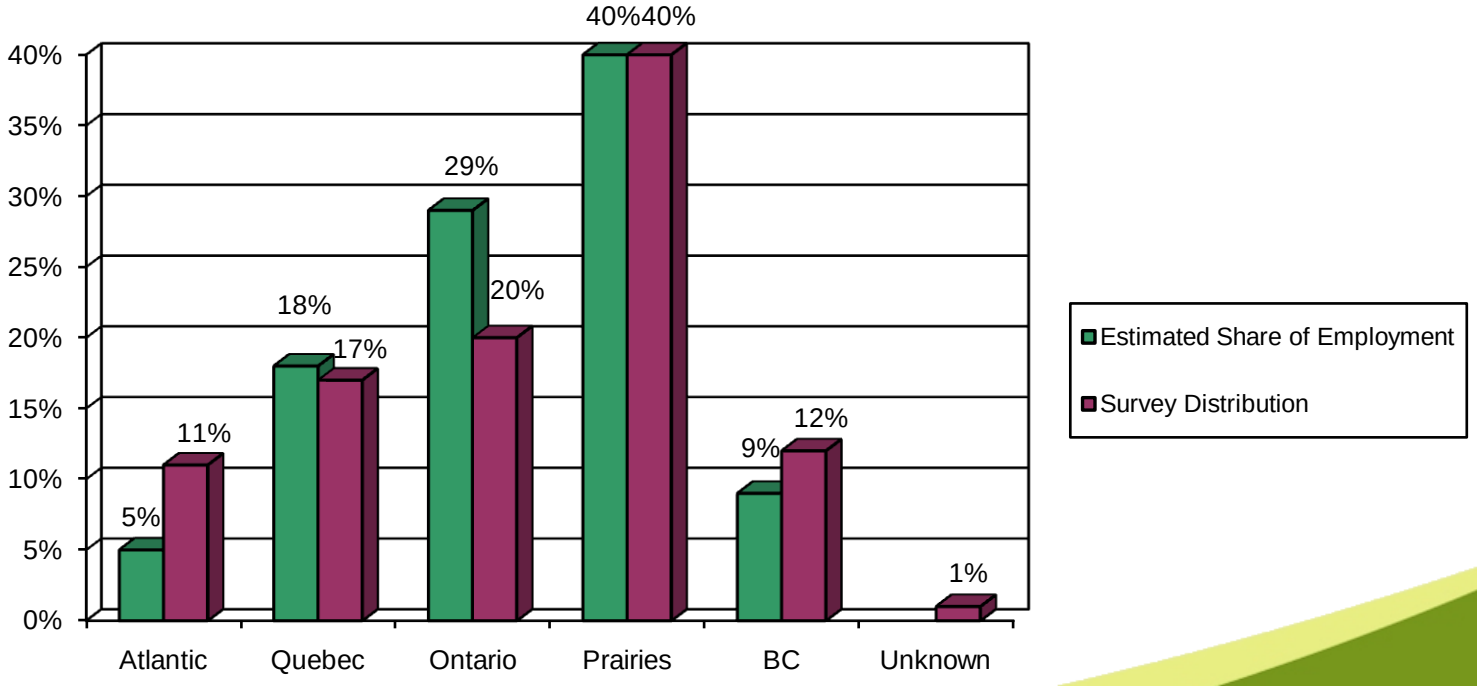
Representativeness of the Survey Sample by Region



Source: Table 1-4, Report

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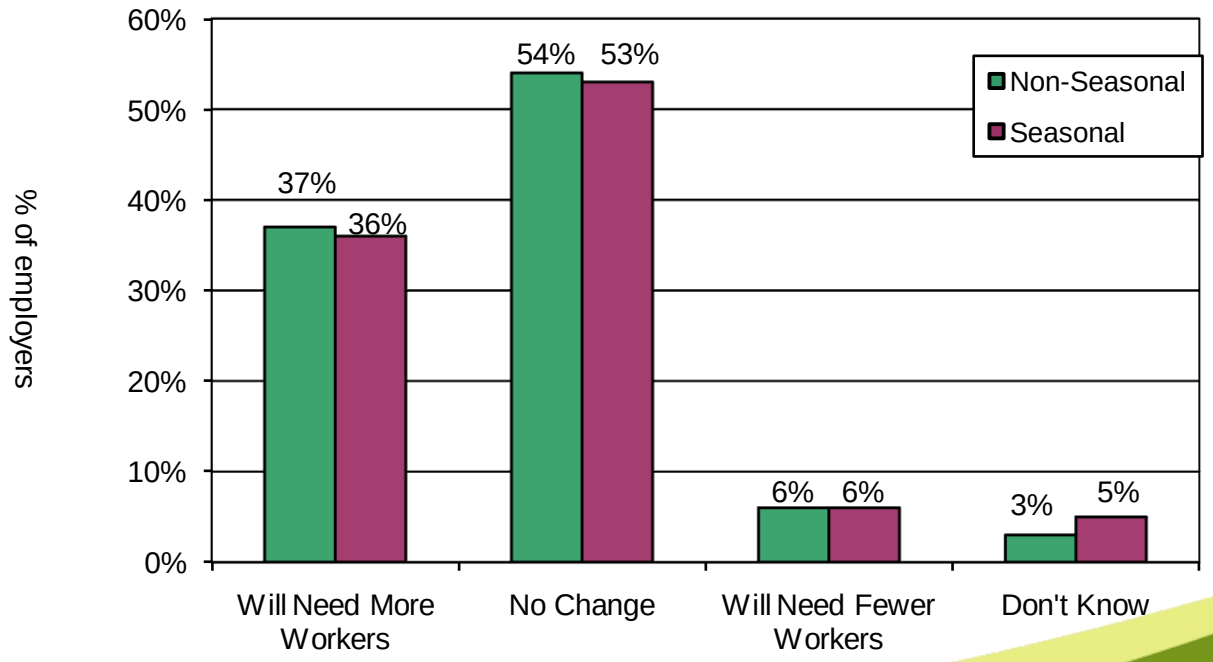
Employer Perspectives on Workforce Requirements Over the Next Two Years



n=505 for Non-Seasonal Worker Respondents, 386 for Seasonal Worker Requirements
Source: Employer Survey, QA6a, QA7a

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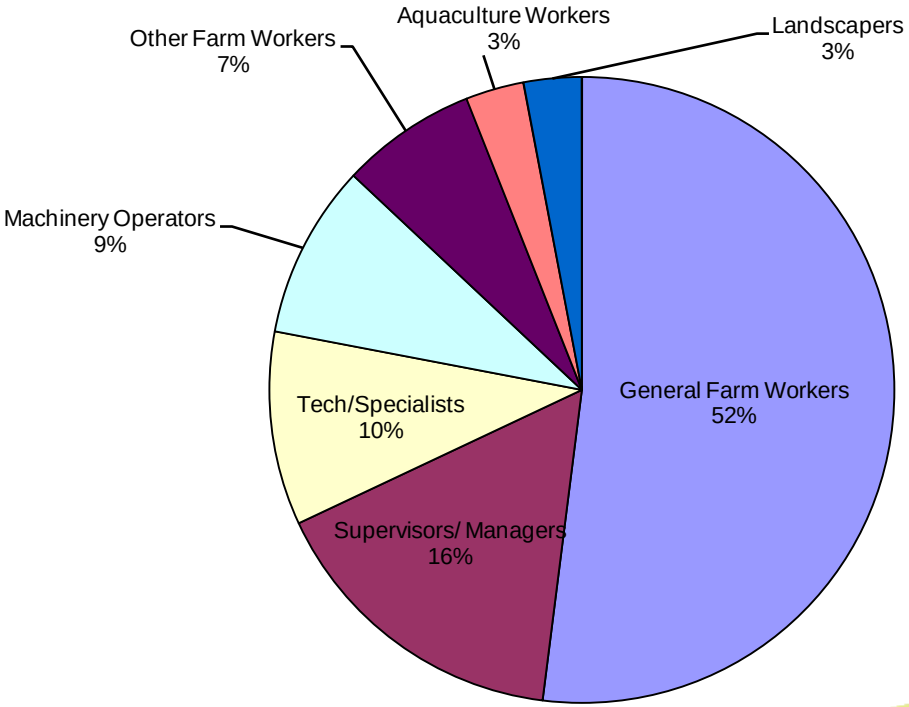
Employment by Major Occupational Group (Non-Seasonal)



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

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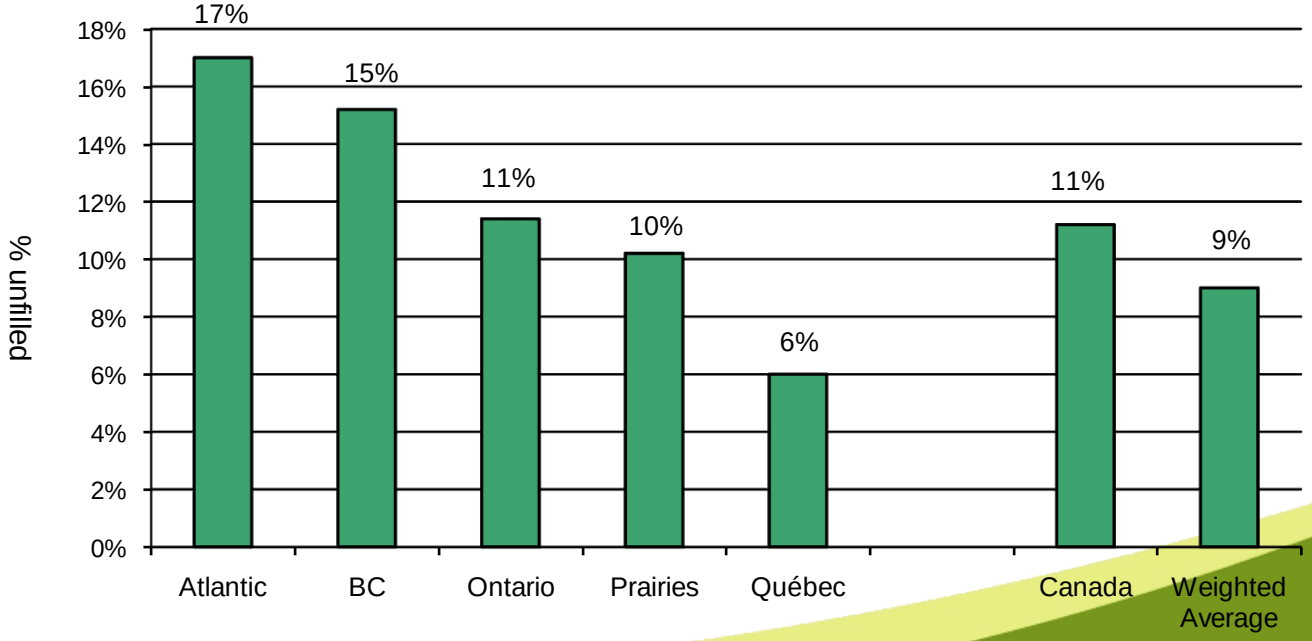
Vacancy Rates by Region % Unfilled as a Proportion of Current Employment plus Unfilled Positions (2008) Non-Seasonal Positions



n=525
Source: Employer Survey, Computed from QA6b

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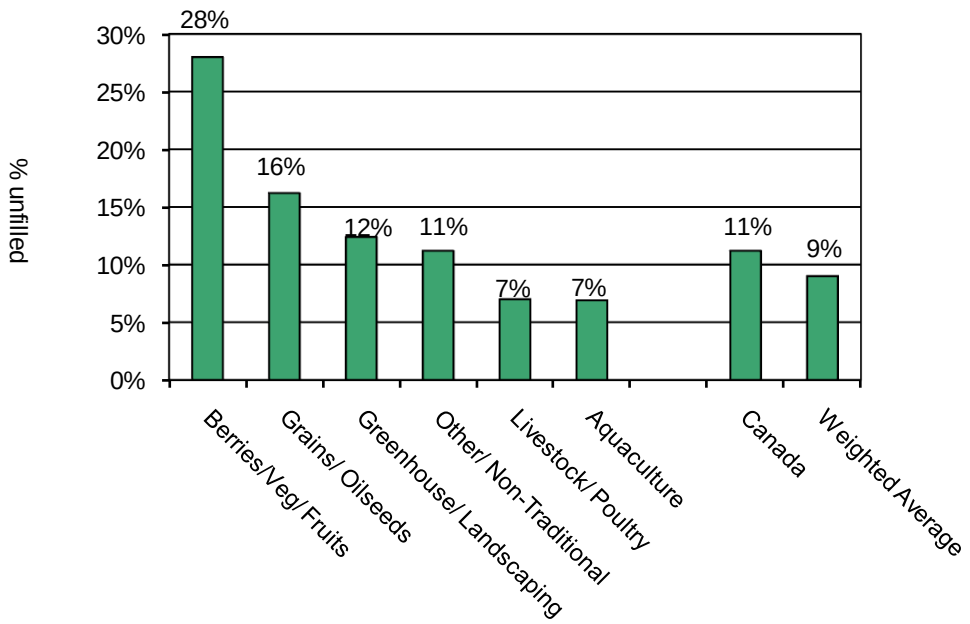
Vacancy Rates by Major Commodity Group % Unfilled as a Proportion of Current Employment plus Unfilled Positions (2008) Non-Seasonal Positions



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).

n=505
Source: Employer Survey, Computed from QA6b

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,)
  - Increasing use of SAWP suggests high vacancy rates

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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	+25,780
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.

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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

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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%	1920	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

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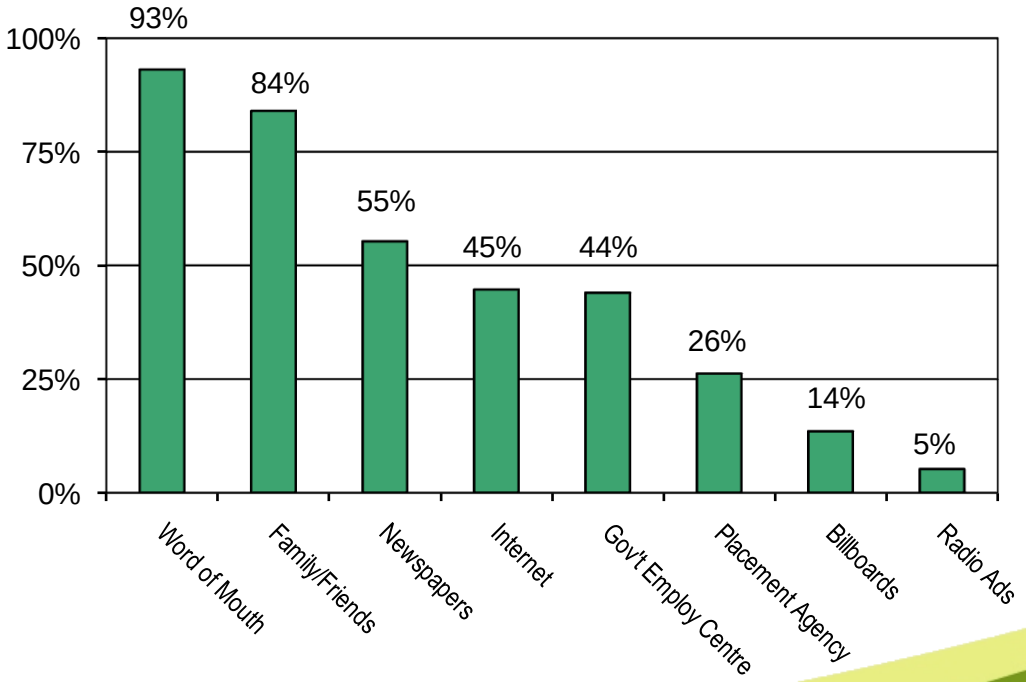
Methods Used to Recruit Employees



n=481
Source: Employer Survey, QB1

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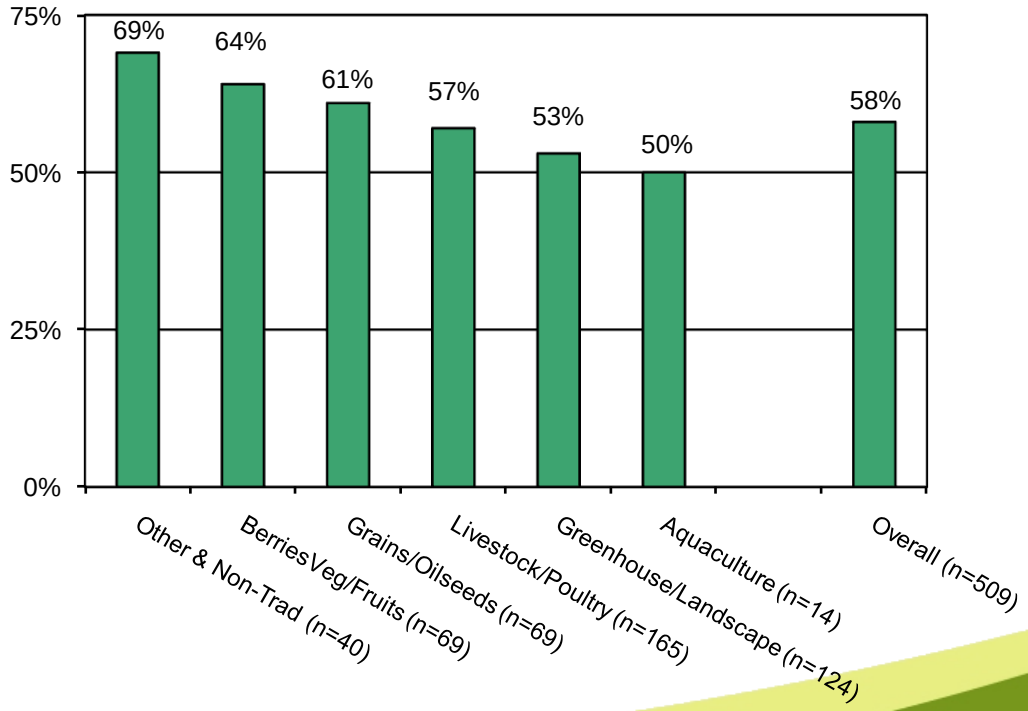
Difficulties Recruiting Employees by Commodity



n=509
Source: Employer Survey, QB2

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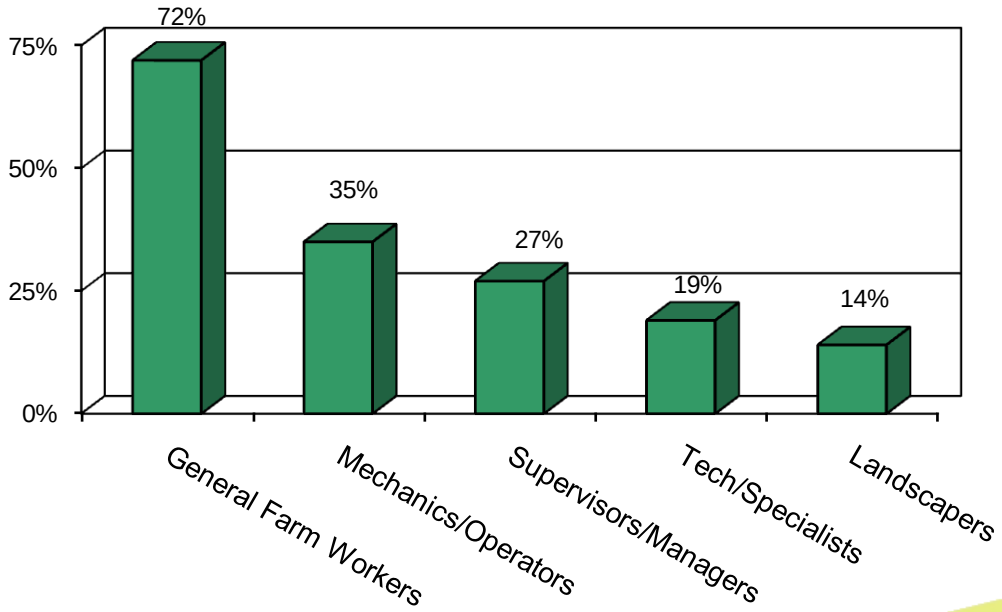
Positions Difficult to Fill by Occupational Category

(% 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.

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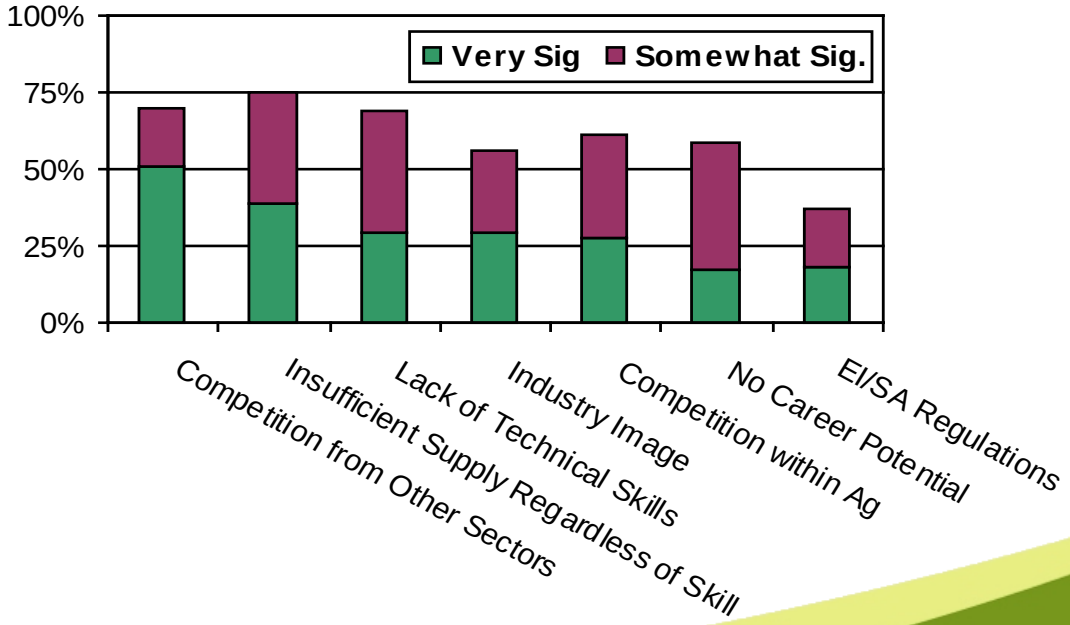
Barriers to Hiring Employees



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:
  - Having HR processes and policies eg. Vacation,
  - Having training programs
  - Employee retention processes (e.g., health & benefits pkg, internal training and certification)

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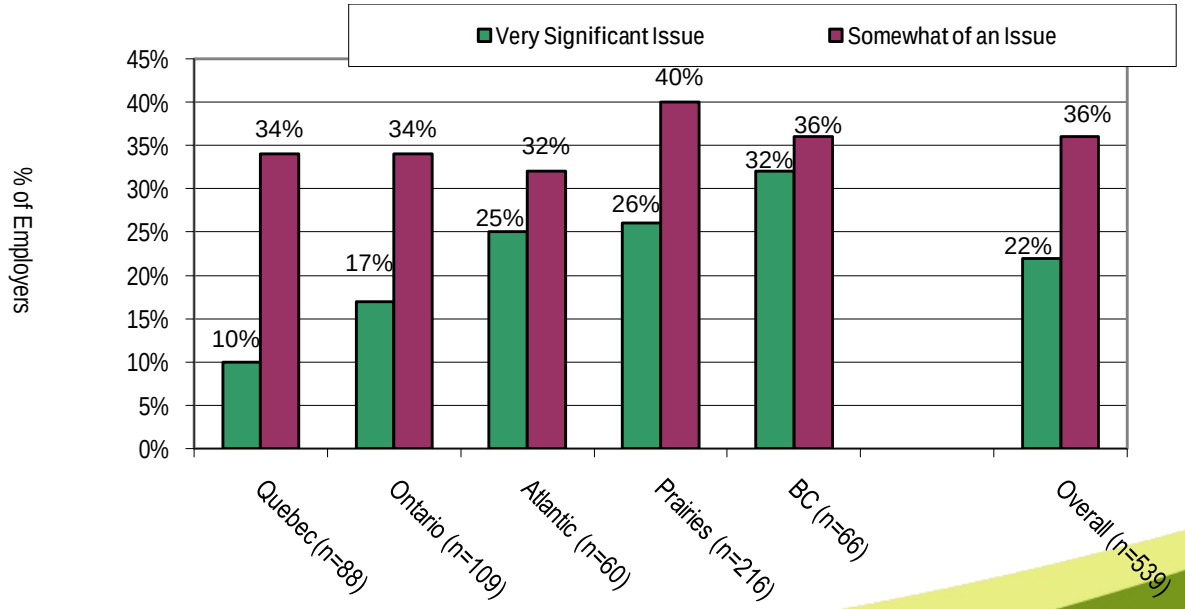
Employee Turnover

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.



n=539
Source: Employer Survey, QC2

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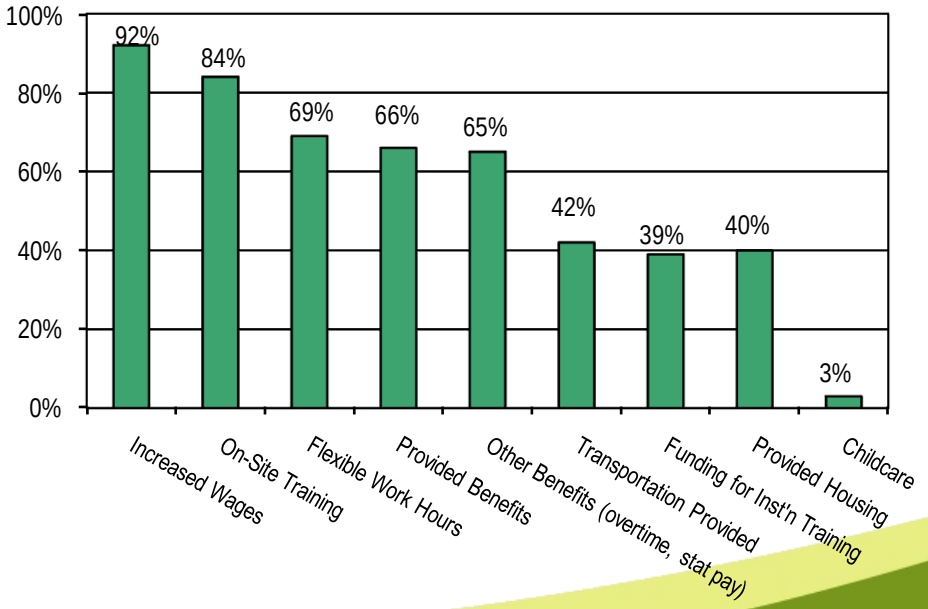
Steps Taken to Attract and Retain Employees

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



n=355
Source: Employer Survey, QC3a
Note: Totals do not add to 100% due to multiple response.

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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 valued, however cannot meet current labour demands
- Current immigration policies deter and are less than encouraging in attracting new workers
- Agriculture has room to further enhance recruitment and retention capability

Recommendations

1. Improve Labour Market Information for the agriculture sector
2. Take action to increase the supply of workers in primary agriculture
3. Develop additional Human Resource tools for primary agriculture

1. Improve Labour Market Information for the Sector

1.1 Improve data collection from the primary agriculture

1.2 Encourage special studies to address sector labour market information requirements

2. Increase the Supply of Workers in Agriculture

2.1 Share information on vacancy rates to support policies designed to increase the number of agricultural workers in Canada

2.2 Meet with Citizenship and Immigration Canada to present research findings and discuss implications

2.3 Examine the feasibility of implementing changes to employment insurance and social assistance regulations

2.4 Market the sector to students

2.5 Improve agriculture's image

3. Enhance Human Resource Practices in the Sector

3.1 Explore the feasibility of developing human resource management training in primary agriculture

3.2 Develop additional human resource tools to support primary agriculture employers

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