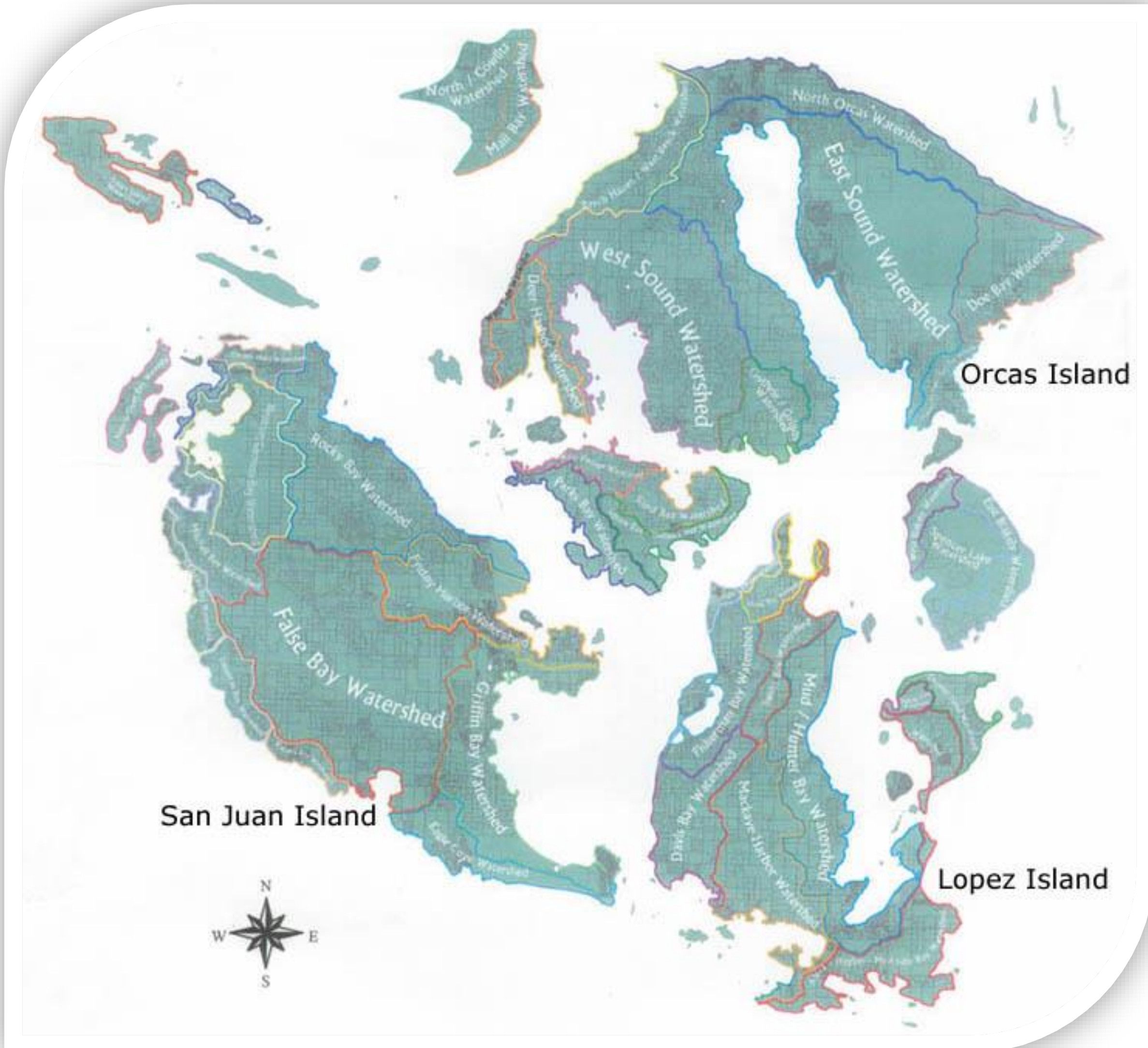
Agricultural Viability in San Juan County: 2017 and 2020 Survey Results



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Contents

List of Figures i
List of Tables i
Background 1
Key Findings 2
Results 4
Questionnaire 40

Report Information

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List of Figures

Figure 1. Which of the following categories best describes your farm? (Q01) 4
Figure 2. Do you have any plans to become a commercial farm within the next 5 years (Q02) 6
Figure 3. Of the agricultural crops that you grew in 2014/2018 and 2015/2019, what percentage did you grow for each of the following? (Q05) 9
Figure 4. Do you plan to maintain, expand, or decrease the scope of your operation within the next five years? (Q09) 14
Figure 5. Have you developed a business plan for your farm within the last five years by Net Profit (Q11) 16
Figure 6. Have you ever developed a Farm Conservation Plan with the Conservation District or NRCS? (Q12) 17
Figure 7. Have you developed an Individual Stewardship Plan as part of the Voluntary Stewardship Program by Net Profit (Q14) 2020 survey only 18
Figure 8. How many acres, both owned and leased, did you farm in each of the three most recent years? (Q16) 19
Figure 9. What is the leased land used for? (Q17) 2020 only 20
Figure 10. Is your lease formal or informal? (Q18) 2020 survey only 21
Figure 11. How do you pay for the leased land? (Q19) 2020 only 22
Figure 12. Do you own your land outright? (Q20) 2020 only 24
Figure 13. Do you need assistance to maintain production or put your land under production? (Q27) 2020 only 32
Figure 14. Do you need support for any of the following actions? (Q28) 2020 only 33
Figure 15. Are you interested in collecting data on your farm or collaborating with fellow farmers on any of the following? (Q29) 2020 only 34
Figure 16. Is this farm or ranch primarily or fully... (Q31) 35
Figure 17. How long have you been the primary operator of your farm? (Q32) 36
Figure 18. Approximate age in years (based on year born) (Q33) 37
Figure 19. How many more years do you plan to continue farming? (Q34) 38

List of Tables

Table 1. Which of the following categories best describes your farm? "Other" comments (Q01) 5
Table 2. Do you have any plans to become a commercial farm within the next 5 years? (Q02) 6
Table 3. Number of Market Outlets Used (Q04) 7
Table 4. Percent Using Market Outlet (Q04) 7
Table 5. Percent Using Market Outlet "Other" comments" (Q04) 8
Table 6. Of the agricultural crops that you grew in 2014/2018 and 2015/2019, what percentage did you grow for each of the following? "Other" comments (Q05) 10
Table 7. Number of Ag Producers Indicating the Issue Has Been a Challenge (Q08) 11
Table 8. Issues that have been a challenge to farming in San Juan County – 2017 (Q08) 12
Table 9. Issues that have been a challenge to farming in San Juan County – 2020 (Q08) 12
Table 10. Issues that have been a challenge to farming in San Juan County "Other" comments (Q08) 13
Table 11. Definite or Moderate Need to Increase Scope of Operation (Q10) 15
Table 12. If you were to increase the scope of your operation, how much need would you have in each of the following areas? "Other" comments (Q10) 15
Table 13. Have you developed a business plan for your farm within the last five years by Net profit? (Q11) 16
Table 14. Have you ever developed a Farm Conservation Plan with the Conservation District or NRCS by Net profit? (Q12) 17
Table 15. Have you developed an Individual Stewardship Plan as part of the Voluntary Stewardship Program by Net Profit (Q14) 2020 Survey only 18
Table 16. What is the leased land used for by Farm size (Q17) 2020 only 20
Table 17. What is the leased land used for? "Other" comments (Q17) 20
Table 18. Is your lease formal or informal? (Q18) 2020 only 21
Table 19. Type of Lease by Farm Size (Q18) 2020 only 21
Table 20. How do you pay for the leased land? (Q19) 2020 only 22
Table 21. How do you pay for the leased land by Farm size (Q19) 23
Table 22. How do you pay for the leased land? "Other" comments (Q19) 23
Table 23. What were your total gross annual sales in 2015/2019 (collapsed)? (Q22) 25
Table 24. What was your net profit in 2015/2019 (collapsed)? (Q23) 25
Table 25. How much did you pay in taxes in 2019? (Q24) 2020 only 26
Table 26. In 2019, what is the estimated value of food you provided for your family and others that was not exchanged for money? (Q25) 2020 only 26
Table 27. Revenue Source Used (Q26) 27
Table 28. Revenue source used by Farm size (Q26) 28
Table 29. Average percentage of market value for revenue sources (Q26) 29
Table 30. Average percentage of land farmed for revenue sources (Q26) 30
Table 31. In 2015/2019, what was the percentage of your total market value for each of these revenue sources? "Other" comments (Q26) 30
Table 32. Do you need assistance to maintain production or put your land under production? (Q27) 2020 only 32
Table 33. Do you need support for any of the following actions? (Q28) 2020 only 33

Table 34. Are you interested in collecting data on your farm or collaborating with fellow farmers on any of the following? (Q29)....34
Table 35. Is this farm or ranch primarily or fully... (Q31)....35
Table 36. How long have you been the primary operator of your farm? (Q32)....36
Table 37. How many more years do you plan to continue farming? (Q33)....37
Table 38. How many more years do you plan to continue farming? (Q34)....38
Table 39. How many more years do you plan to continue farming by age? 39

1. Background

The Social and Economic Sciences Research Center (SESRC) worked collaboratively with the San Juan Islands Conservation District to conduct the Agricultural Viability in San Juan County in 2017 and again in 2020. The purpose of this project is to help better understand how to increase profitability for farmers and support agriculture in San Juan County. Respondents were contacted by mail and email (when available). The survey was originally conducted in February and March of 2017 and then again in October and November 2020.

The San Juan Islands Conservation District provided the sample to SESRC. It was taken from mail and email lists maintained by the Conservation District. These lists included farmers located throughout San Juan County. The 2017 list contained 259 names and the 2020 list has 283 names, addresses and email addresses when available.

In 2017, we had 71 respondents complete or partially complete the survey resulting in a 29.1% response rate. In 2020, responses were received from 86 ag producers which resulted in a 38.1% response rate.

The questionnaire includes questions on a variety of topics including market channels, size of farm (acres, sales, net profit), challenges to farming in San Juan County, products grown or produced, and demographics.

Please see SESRC data reports 17-10 and 20-46 for more information on the procedures and instruments used in the implementation of these surveys.

2. Key Findings

- Over half of the respondents indicated they have a commercial farm (2017 – 55.7%; 2020 – 53.3%). (Q01)
- Most producers focus on three or fewer market outlets. (Q04)
- Respondents indicated in both survey years, that they grew between two-thirds and three-quarters of their products for sale. (Q05)
- Cost of on-farm infrastructure was listed as the top challenge in both 2017 and 2020. (Q08)
- In the 2020 survey, four out of ten ag producers (39%) responded they plan to increase or expand operations. (Q09)
- "Other" areas of where respondents might need assistance was indicated most frequently as having a definite or moderate need to increase the scope of operations. Additional labor is the second most need, access to reliable markets is third. (Q10)
- The number of acres farmed has remained fairly consistent throughout the years asked on the survey. (Q16)
- Nearly two-thirds of respondents indicated they use their leased land for livestock (62%) and just over half (52%) use the land for haying. (Q17)
- Smaller farms are more likely to have an informal lease than larger farms. (Q18)
- Nearly half (48%) of respondents checked the 'No rent' option when asked how they pay for leased land. (Q19)
- In both 2017 and 2020, the most common revenue source used by ag producers responding to the survey was the vegetable, herbs, melons, potatoes category (2017 - 47%, 2020 - 65%).
- On average, vegetables, herbs, melons, and potatoes has the highest percentage of market value in both the 2017 and 2020 surveys (22.6% - 2017, 35.5% - 2020).
- The highest average percentage of land farm for 2017 was for Cattle and calves as well as for Animal fiber (both at 22.1%). The highest average percent of land used in 2020 (21.7%) was for "Other" products.
- About one-quarter of ag producers (27%) indicated they need assistance to maintain production or put land under production. (Q27)
- Providing mentorship (62%), being part of an agricultural producers cooperative (51%) and voluntary gathering of observational data on water quality, soil health, and biodiversity (51%) were the most commonly checked items when ag producers were asked if they were interested in collecting data on their farm or collaborating with fellow farmers. (Q29)
- Four out of ten (40%) farms or ranches were primarily or fully female-owned. (Q31)
- In the 2017 survey, nearly half of respondents (48%) fall into the mid-career category (11-25 years) while less than one-fifth (16%) were categorized as early career (0-10 years). In the 2020 survey, the percentage in each category was much closer in each group: one-quarter in early career (27%), one-third (33%) in mid-career and forty percent in late career. (Q32)

- In 2020, the results show a higher percentage of respondents who are under 35 (2.0% up to 9.1%) and 36 – 50 years of age (7.8% up to 16.4%). The percent of farmers in the 51 – 60 age range saw the largest decline from 2017 to 2020 (29.4% down to 20.0%. (Q33)
- Respondents indicating 11-15 years of additional farming time declined from 28% in 2017 to 9% in 2020; those saying five years or less of farming decreased from 28% in 2017 to 19% in 2020. (Q34)

3. Results

Q01
Over half of the respondents indicated they have a commercial farm (2017 – 55.7%; 2020 – 53.3%). Just under one-third indicated their farm is both a commercial and non-commercial farm (2017 – 28.6%; 2020 – 30.7%). Throughout this report we generally look at farms that are either commercial or both commercial and non-commercial farms. These two categories represent 59 farms in 2017 and 63 farms in 2020.

Figure 1. Which of the following categories best describes your farm? (Q01)

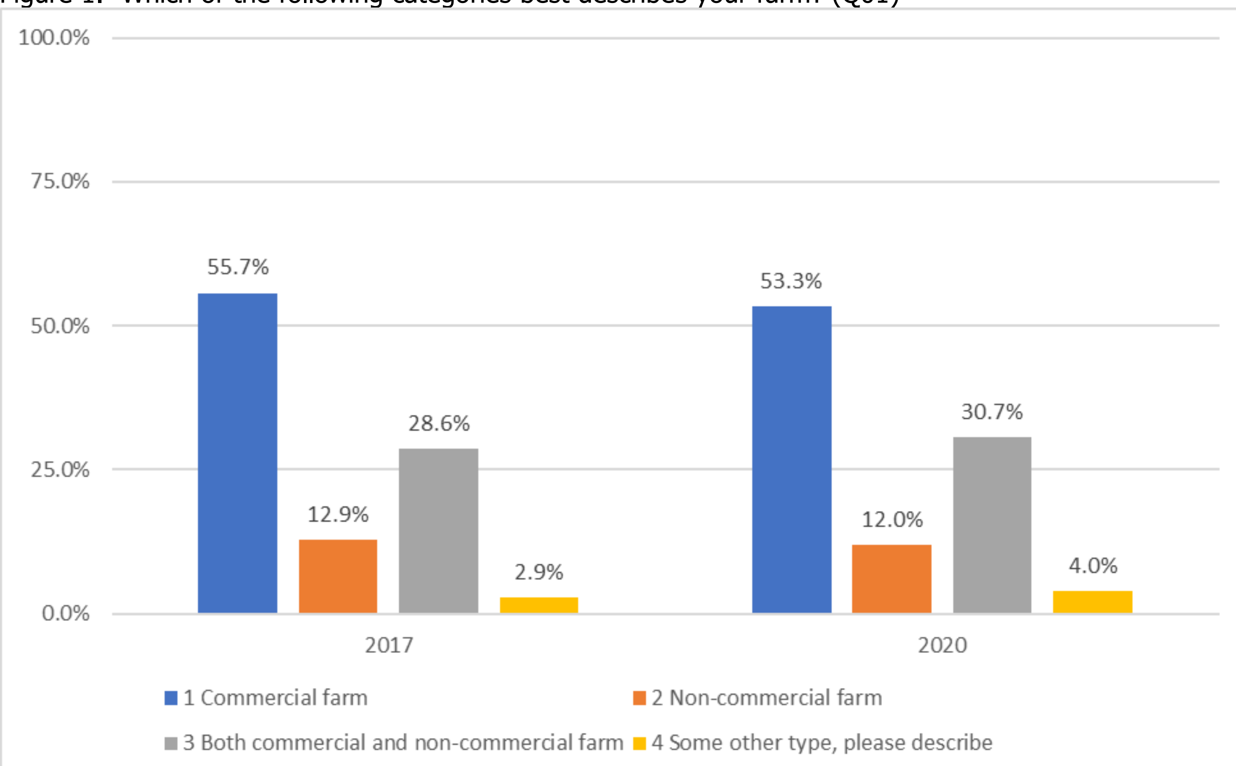

Table 1. Which of the following categories best describes your farm? "Other" comments (Q01)

2017	Educational non profit
2017	Hobby - occasional sales
2017	closed commercial farm
2017	family owned, operated by me
2017	My wife and I.
2017	do not own land yet
2017	Some land is leased to other.
2017	long-term lease for a specific area of land
2017	My parents own the land, and we are all members of an LLC that leases the land from them.
2020	Residential, home garden
2020	non for profit
2020	Landscape plant nursery
2020	own, but do not operate a commercial farm

Q02
Respondents who indicated they were a non-commercial farmer were then asked if they had any plans to become a commercial farm. Only two respondents in 2017 and one in 2020 indicated plans to become a commercial farm in the next 5 years.

Figure 2. Do you have any plans to become a commercial farm within the next 5 years (Q02)

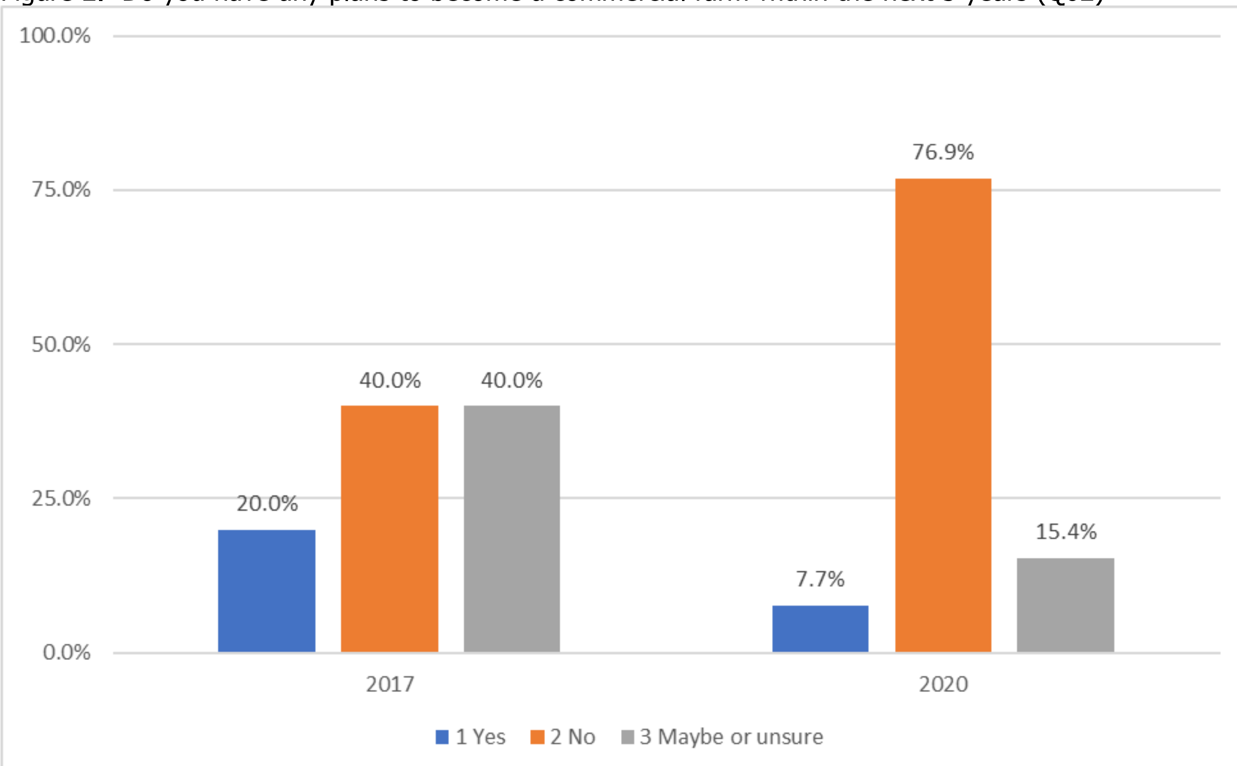

Table 2. Do you have any plans to become a commercial farm within the next 5 years? (Q02)

	2017		2020	
	Number	Percent	Number	Percent
1 Yes	2	20.0%	1	7.7%
2 No	4	40.0%	10	76.9%
3 Maybe or unsure	4	40.0%	2	15.4%

Q04
Most producers focus on three or fewer market outlets. Approximately one-quarter of producers use a single market outlet. Two-thirds of farmers market their agricultural products in 3 or fewer market outlets.

Table 3. Number of Market Outlets Used (Q04)

# of outlets	2017	2020
1	23.1%	26.2%
2	30.8%	21.3%
3	13.5%	16.4%
4	11.5%	21.3%
5	13.5%	6.6%
6	1.9%	4.9%
7	1.9%	0.0%
8	3.8%	1.6%
9	0.0%	0.0%
10	0.0%	1.6%

The most commonly used markets remained relatively consistent from 2017 to 2020. The main differences are Island grocery stores being the fourth most used out in 2017 but only the seventh most in 2020. Island food cooperatives increased from seventh in 2017 to fifth in 2020. Island restaurants was most common in 2017 and Direct to customer lists was the most used in 2020. The top five market outlets are highlighted in yellow in the table below.

Table 4. Percent Using Market Outlet (Q04)

Market outlet used	2017 % using outlet	2017 Rank	2020 % using outlet	2020 Rank
Q04aa_used : Farmer's Market	26.8%	5	31.5%	4
Q04ba_used : Island Food Cooperatives	19.3%	7	27.8%	5
Q04ca_used : Off-island Food Cooperatives	8.8%	10	5.4%	12
Q04da_used : Community Support Agriculture (CSA)	14.0%	8	13.5%	9
Q04ea_used : Island Restaurants	45.6%	1	36.5%	2
Q04fa_used : Off-island Restaurants	8.8%	11	8.1%	11
Q04ga_used : Island Grocery Stores	28.1%	4	21.6%	7
Q04ha_used : Off-island Grocery Stores	7.0%	12	5.4%	13
Q04ia_used : Farm Stands	43.9%	2	33.8%	3
Q04ja_used : Web-based Sales	10.5%	9	14.9%	8
Q04ka_used : Direct to Customer List	43.9%	3	40.5%	1
Q04la_used : Food Banks*	-	-	12.2%	10
Q04ma_used : Puget Sound Food Hub*	-	-	1.4%	16
Q04na_used : Livestock Auction*	-	-	4.1%	15
Q04oa_used : Schools*	-	-	5.4%	14
Q04pa_used : Other	26.3%	5	23.3%	6

* Not asked in 2017

Table 5. Percent Using Market Outlet "Other" comments" (Q04)

2017	School Cafeteria
2017	farmer who hays my field
2017	other farmers going to Market
2017	Farm Store
2017	Unknown-lessee manages sales
2017	Farm gate sales
2017	U-Pick
2017	SCHOOLS/ DISTRIBUTORS (Wholesale is redundant as grocers and restaurants are wholesale)
2017	Horse boarders buy direct
2017	word of mouth
2017	local organizations
2017	Farm to table dinners

Q05
Respondents indicated in both survey years, that they grew between two-thirds and three-quarters of their products for sale.

Figure 3. Of the agricultural crops that you grew in 2014/2018 and 2015/2019, what percentage did you grow for each of the following? (Q05)

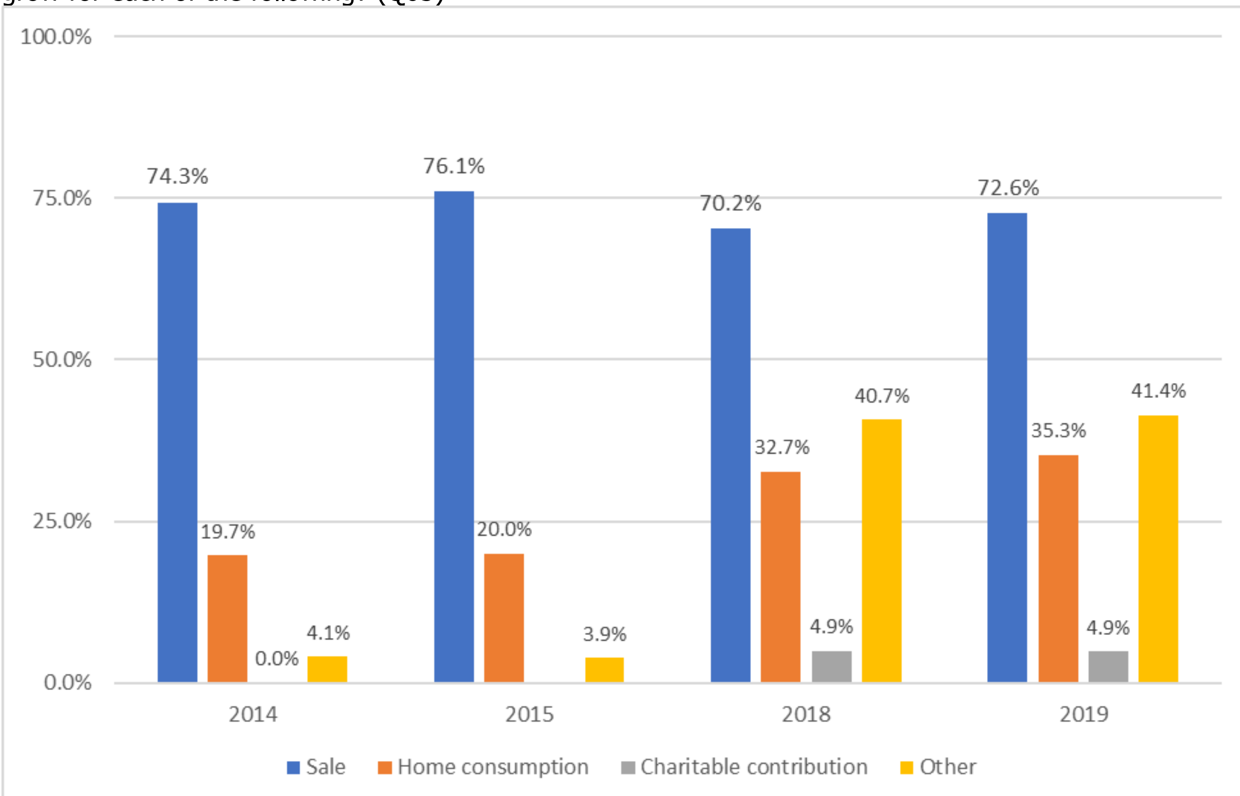

Table 6. Of the agricultural crops that you grew in 2014/2018 and 2015/2019, what percentage did you grow for each of the following? "Other" comments (Q05)

2017	School donate, donate food bank.
2017	foodbank, senior center
2017	Processing- then sale
2017	Donation
2017	ag services
2020	barter
2020	work trade
2020	retail markets
2020	replenish stock
2020	Employee share
2020	hay fields/pasture
2020	customer sales
2020	Winery
2020	building up stock
2020	Future crop
2020	To the managers
2020	I always give plants and extra produce to family and friends.
2020	$1 of every berry box sold is donated to LIFE program at Lopez school
2020	livestock graving lease
2020	For hard cider production
2020	family, friends
2020	lease
2020	not in operation in 2018

Q08
We created a dichotomous variable (challenge/not a challenge) from the data for this question. Everyone who marked that it was a slight, moderate, challenge, or extreme challenge was put in the 'challenge' category. Respondents who marked 'not a challenge' were kept in that group. Ones who said it does not apply were excluded. Cost of on-farm infrastructure was listed as the top challenge in both 2017 and 2020. Cost of inputs (a new category in 2020) was the second biggest challenge in 2020. Cost/availability of skilled farm labor ranked high in each survey (2nd in 2017 and 3rd in 2020). The top five challenges in 2017 and 2020 are highlighted in Table 4.

Table 7. Number of Ag Producers Indicating the Issue Has Been a Challenge (Q08)

	2017		2020	
	# of producers	Rank	# of producers	Rank
Q08A: Cost/availability of skilled farm labor	33	2	36	3
Q08B: Cost of inputs*	0	-	39	2
Q08C: Access to farm machinery	26	4	27	6
Q08D: Access to affordable farmland	7	9	20	14
Q08E: Access to water*	0		20	15
Q08F: Access to markets	26	5	27	7
Q08G: Access to business planning expertise or training	15	7	15	16
Q08H: Access to farm management expertise or training	14	8	21	12
Q08I: Cost of on-farm infrastructure	39	1	46	1
Q08J: Farm worker housing	24	6	26	9
Q08K: Access to capital/funds	32	3	27	5
Q08L: Storage capacity*	0	-	33	4
Q08M: Season extension infrastructure*	0	-	27	8
Q08N: Food safety regulation*	0	-	21	13
Q08O: Land use regulation*	0	-	25	10
Q08P: Surveys wanting all my info*	0	-	24	11
Q08Q: Other, list:	9	10	8	17

*not asked in 2017

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As we drill down on this question we find that Cost/availability of skilled farm labor was the issue marked the most often as an extreme challenge in 2017 (23.5%). Farm worker housing was the issue most marked as an extreme challenge in 2020 (25.0%). Shaded cells have a percentage of 20% or higher.

Table 8. Issues that have been a challenge to farming in San Juan County – 2017 (Q08)

		Extreme challenge	Challenge	Moderate challenge	Slight challenge	Not a challenge	Does not apply
2017	Q08A: Cost/availability of skilled farm labor	23.5%	27.5%	3.9%	9.8%	7.8%	27.5%
	Q08C: Access to farm machinery	0.0%	24.5%	10.2%	18.4%	26.5%	20.4%
	Q08D: Access to affordable farmland	0.0%	2.1%	6.3%	6.3%	41.7%	43.8%
	Q08F: Access to markets	0.0%	16.3%	16.3%	20.4%	38.8%	8.2%
	Q08G: Access to business planning expertise or training	2.1%	2.1%	12.5%	14.6%	45.8%	22.9%
	Q08H: Access to farm management expertise or training	2.1%	4.2%	4.2%	18.8%	50.0%	20.8%
	Q08I: Cost of on-farm infrastructure	16.7%	41.7%	12.5%	10.4%	16.7%	2.1%
	Q08J: Farm worker housing	20.4%	24.5%	4.1%	0.0%	18.4%	32.7%
	Q08K: Access to capital/funds	12.0%	14.0%	22.0%	16.0%	28.0%	8.0%
	Q08Q: Other, list:	38.5%	30.8%	0.0%	0.0%	0.0%	30.8%

Table 9. Issues that have been a challenge to farming in San Juan County – 2020 (Q08)

		Extreme challenge	Challenge	Moderate challenge	Slight challenge	Not a challenge	Does not apply
2020	Q08A: Cost/availability of skilled farm labor	10.3%	32.8%	10.3%	8.6%	6.9%	31.0%
	Q08B: Cost of inputs	3.6%	30.4%	19.6%	16.1%	21.4%	8.9%
	Q08C: Access to farm machinery	0.0%	10.5%	17.5%	19.3%	29.8%	22.8%
	Q08D: Access to affordable farmland	10.5%	7.0%	3.5%	14.0%	40.4%	24.6%
	Q08E: Access to water	5.4%	8.9%	7.1%	14.3%	48.2%	16.1%
	Q08F: Access to markets	0.0%	19.3%	15.8%	12.3%	36.8%	15.8%
	Q08G: Access to business planning expertise or training	1.8%	5.3%	5.3%	14.0%	50.9%	22.8%
	Q08H: Access to farm management expertise or training	3.5%	5.3%	7.0%	21.1%	40.4%	22.8%
	Q08I: Cost of on-farm infrastructure	5.1%	33.9%	20.3%	18.6%	13.6%	8.5%
	Q08J: Farm worker housing	25.0%	7.1%	10.7%	3.6%	19.6%	33.9%
	Q08K: Access to capital/funds	7.0%	5.3%	19.3%	15.8%	29.8%	22.8%
	Q08L: Storage capacity	12.3%	14.0%	15.8%	15.8%	24.6%	17.5%
	Q08M: Season extension infrastructure	0.0%	14.0%	24.6%	8.8%	28.1%	24.6%
	Q08N: Food safety regulation	0.0%	14.3%	14.3%	8.9%	35.7%	26.8%
	Q08O: Land use regulation	12.7%	10.9%	12.7%	9.1%	41.8%	12.7%
	Q08P: Surveys wanting all my info	7.0%	3.5%	22.8%	8.8%	40.4%	17.5%
	Q08Q: Other, list:	33.3%	33.3%	0.0%	0.0%	16.7%	16.7%

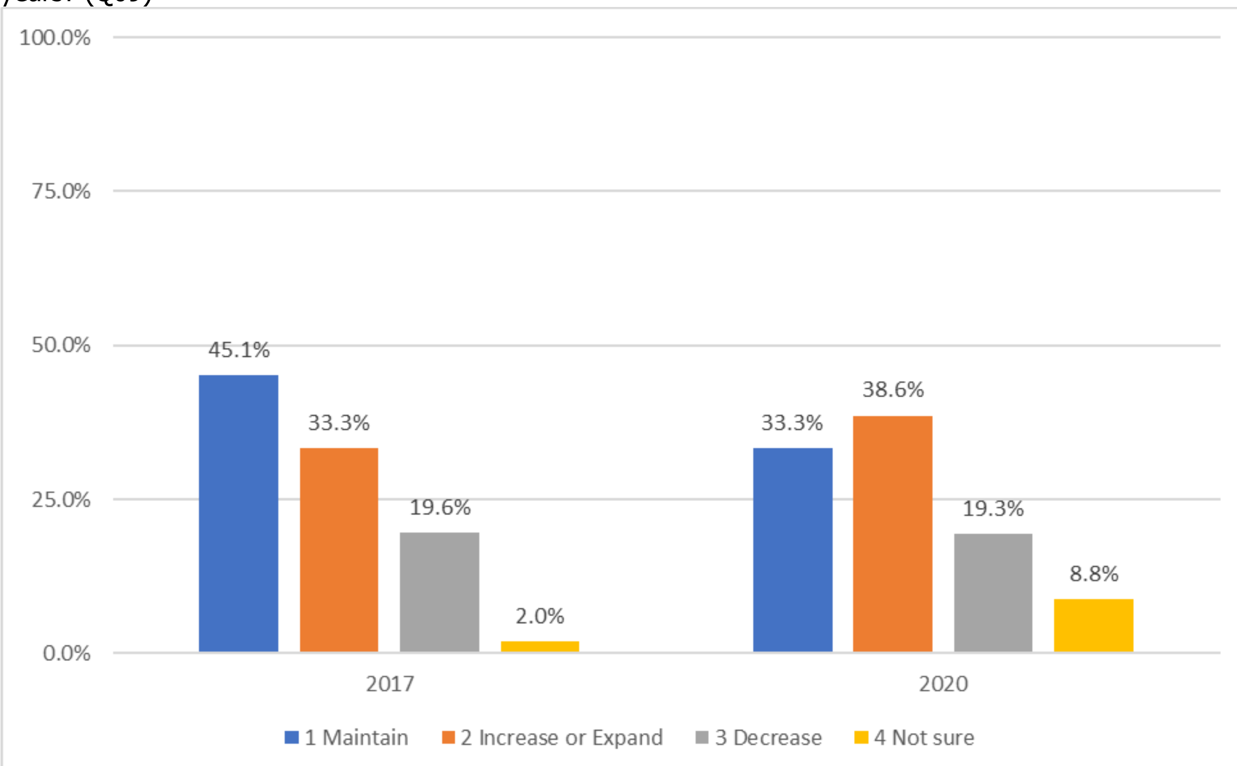
Table 10. Issues that have been a challenge to farming in San Juan County "Other" comments (Q08)

2017	transportation
2017	weather
2017	Need more local eaters.
2017	Relative lack of consumers willing to pay reasonable price for locally grown, high quality, fresh, seasonal food
2017	Pests, weather
2017	Ferry costs
2017	Regulatory Burden/Regional Perspective towards Ag
2017	Water for irrigation.
2017	increasing taxes
2017	cooperative input purchasing
2020	competent Vet service
2020	SWD and fungal diseases brought in by neighbors who do not care for their blueberries or fruit trees
2020	access to packaging materials, boxes etc.
2020	ferry service for live stock
2020	Transport of input (lime, fertilizer).
2020	Property Taxes
2020	No single ag organization coordinating things, but a confusion of ~7 ag orgs duking it out for funding and doing small, independent initiatives instead of organizing, pooling resources and doing larger-scale initiatives.
2020	available skilled/physically fit volunteers
2020	Pest control
2020	high transportation via ferry
2020	Others not following regulations, selling products without having state ag or USDA certification
2020	Lol surveys
2020	drought !!!
2020	Property taxes
2020	weather
2020	Soil fertility

Q09

When respondents answered the question about maintaining, expanding, or deceasing the scope of operations in the next five years, nearly half (45%) said that they plan to maintain the scope in 2017, but in 2020, four out of ten ag producers (39%) responded they plan to increase or expand operations.

Figure 4. Do you plan to maintain, expand, or decrease the scope of your operation within the next five years? (Q09)



Q10
Respondents who answered that they planned to increase or expand in the next five years were then asked how much help they would need in different areas.
"Other" areas of where respondents might need assistance was indicated most frequently as having a definite or moderate need. Additional labor is the second most need, access to reliable markets is third. The top five areas from each survey year are highlighted in yellow in Table 7.

Table 11. Definite or Moderate Need to Increase Scope of Operation (Q10)

	2017		2020	
	% with definite or moderate need	Rank	% with definite or moderate need	Rank
A: More capital	65.2%	5	73.9%	5
B: Grant support*	-	-	81.8%	4
C: Business plan support*	-	-	45.0%	16
D: Farm plan support*	-	-	50.0%	14
E: Additional labor	75.5%	2	86.4%	2
F: Farmworker housing*	-	-	52.4%	13
G: Access to more land	29.5%	6	47.6%	15
H: Access to water*	-	-	61.9%	10
I: Access to farm machinery/equipment	65.9%	4	57.1%	11
J: Access to reliable markets	69.8%	3	85.7%	3
K: Increased means of distribution*	-	-	70.0%	9
L: Access to USDA meat processing (cut & wrap)*	-	-	40.0%	17
M: Access to other processing/value added facilities (increased processing capacity)*	-	-	71.4%	6
N: Cold storage capacity*	-	-	71.4%	7
O: Dry storage capacity*	-	-	55.0%	12
P: Season extension infrastructure*	-	-	71.4%	8
Q: Other, list:	77.8%	1	100.0%	1

* Not asked in 2017

Table 12. If you were to increase the scope of your operation, how much need would you have in each of the following areas? "Other" comments (Q10)

2017	transportation
2017	local support in purchasing
2017	concern about critical area regulations
2017	Regulatory Advisement/Administrative Management
2017	Water
2017	rain we are in the 3rd year of drought.
2017	additional community commitment to local food
2017	Owner Cooperating
2020	Water rights, help with farm insurance
2020	*Licensed*, clean storage for dry food products
2020	physically fit volunteer labor

Q11
About four out of ten farms have developed a business plan within the last five years (43% yes in 2017, 38% yes in 2020). Overall, there does not seem to be a significant difference between whether they have a business plan or not based on net profit.

Figure 5. Have you developed a business plan for your farm within the last five years by Net Profit (Q11)

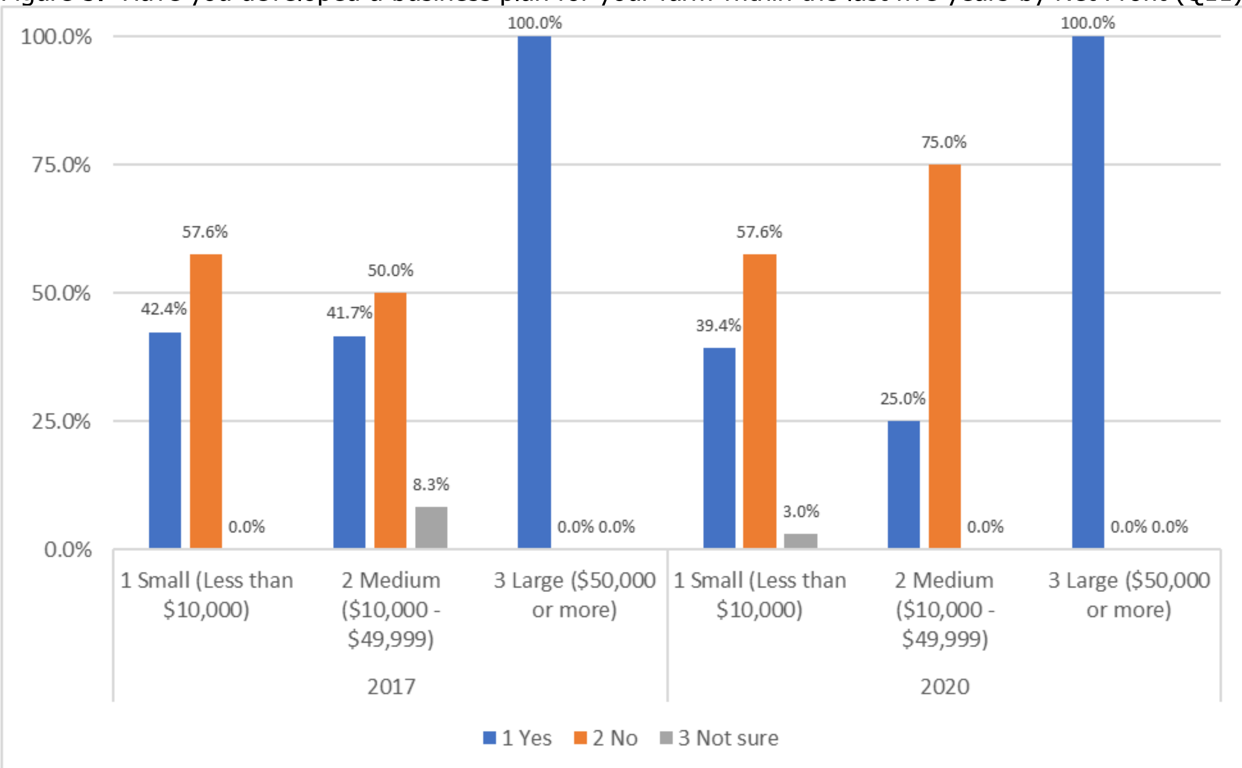


Table 13. Have you developed a business plan for your farm within the last five years by Net profit? (Q11)

	2017						2020					
	1 Small (Less than $10,000)		2 Medium ($10,000 - $49,999)		3 Large ($50,000 or more)		1 Small (Less than $10,000)		2 Medium ($10,000 - $49,999)		3 Large ($50,000 or more)	
	#	Percent	#	Percent	#	Percent	#	Percent	#	Percent	#	Percent
Yes	14	42.4%	5	41.7%	1	100.0%	13	39.4%	3	25.0%	2	38.3%
No	19	57.6%	6	50.0%	0	0.0%	19	57.6%	9	75.0%	0	59.6%
Not sure	0	0.0%	1	8.3%	0	0.0%	1	3.0%	0	0.0%	0	2.1%

Q12
Nearly half of respondents have developed a Farm Conservation Plan with the Conservation District or NRCS (46% in 2017, 49% in 2020). Based on the net profit categories, little difference exists overall between the groups.

Figure 6. Have you ever developed a Farm Conservation Plan with the Conservation District or NRCS? (Q12)

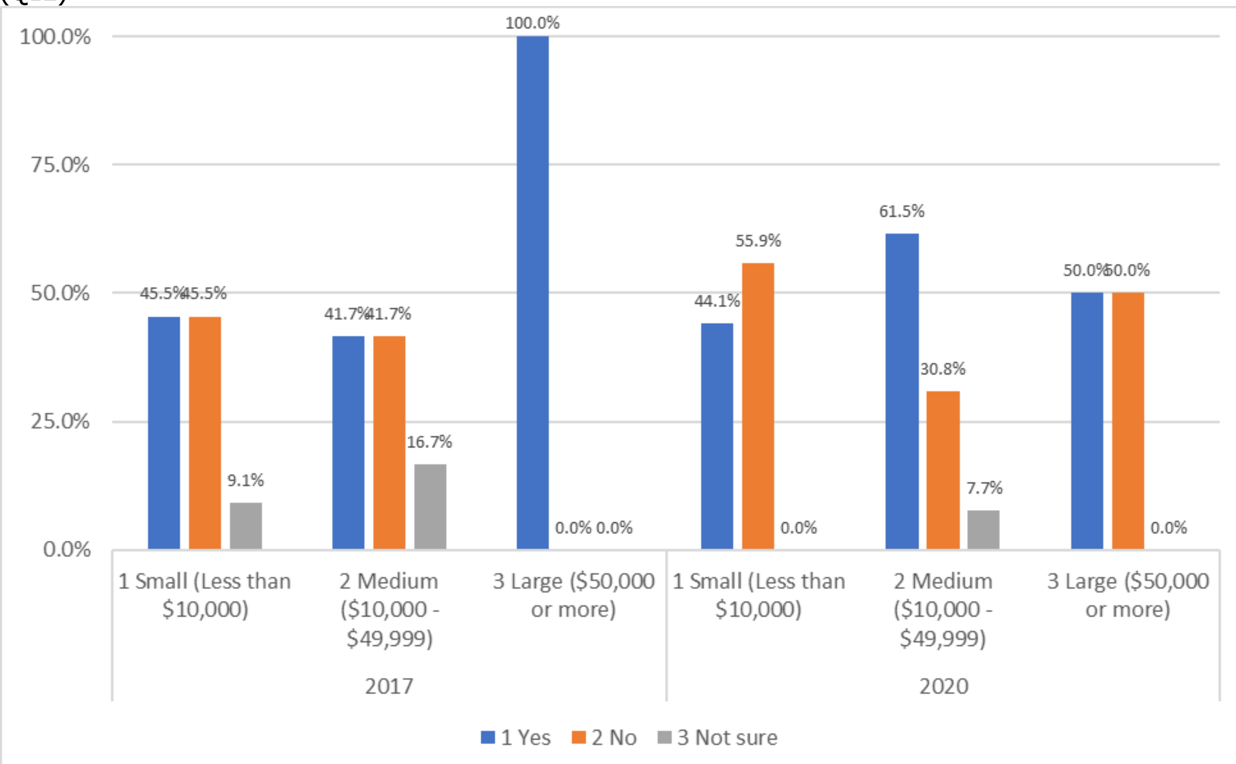


Table 14. Have you ever developed a Farm Conservation Plan with the Conservation District or NRCS by Net profit? (Q12)

	2017						2020					
	1 Small (Less than $10,000)		2 Medium ($10,000 - $49,999)		3 Large ($50,000 or more)		1 Small (Less than $10,000)		2 Medium ($10,000 - $49,999)		3 Large ($50,000 or more)	
	#	Percent	#	Percent	#	Percent	#	Percent	#	Percent	#	Percent
Yes	15	45.5%	5	41.7%	1	100.0%	15	44.1%	8	61.5%	1	49.0%
No	15	45.5%	5	41.7%	0	0.0%	19	55.9%	4	30.8%	1	49.0%
Not sure	3	9.1%	2	16.7%	0	0.0%	0	0.0%	1	7.7%	0	2.0%

Q14
Individual Stewardship Plans are less common that the other types of plans listed earlier with only about one-quarter of respondents (28%) marking that they have one of these. Small and medium sized farms, based on net profit, are more likely to have an Individual Stewardship Plan.

Figure 7. Have you developed an Individual Stewardship Plan as part of the Voluntary Stewardship Program by Net Profit (Q14) 2020 survey only

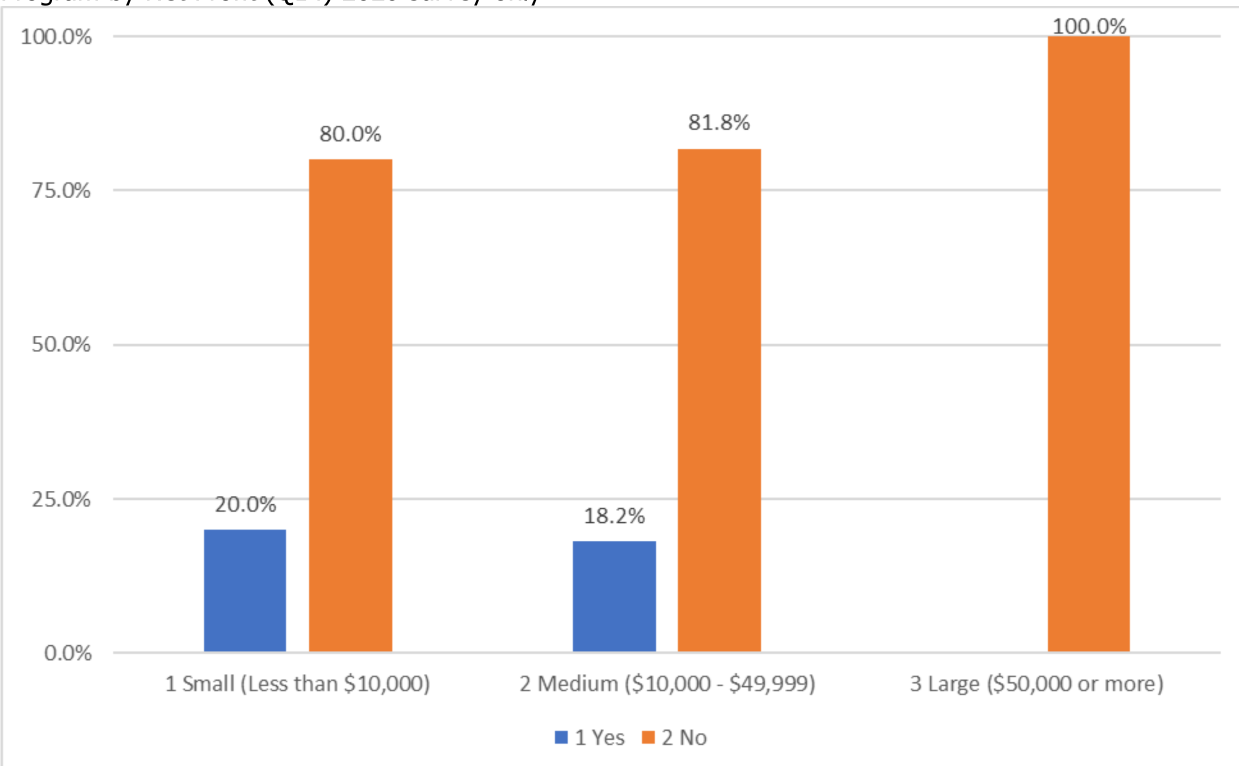
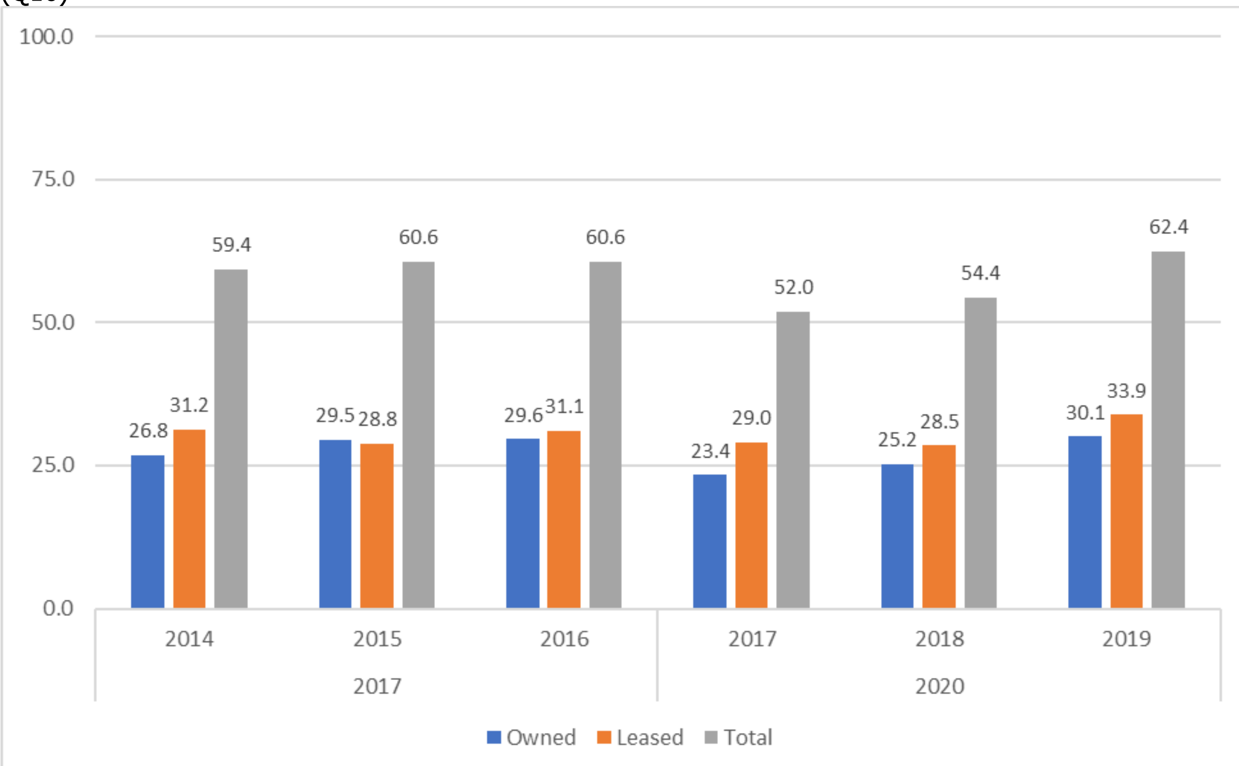


Table 15. Have you developed an Individual Stewardship Plan as part of the Voluntary Stewardship Program by Net Profit (Q14) 2020 Survey only

	1 Small (Less than $10,000)		2 Medium ($10,000 - $49,999)		3 Large ($50,000 or more)	
	#	Percent	#	Percent	#	Percent
Yes	7	20.0%	8	18.2%	0	0.0%
No	28	80.0%	9	81.8%	2	100.0%

Q16
The number of acres farmed in the county has remained fairly consistent throughout the years asked about in the survey. Owned acres range from a low of 23.4 acres in 2017 to a high of 30.1 acres in 2019. Leased farmland ranges from 28.8 acres in 2015 to 33.9 acres in 2019. Total acres farmed are between 52.0 acres (in 2017) to 62.4 acres (in 2019).

Figure 8. How many acres, both owned and leased, did you farm in each of the three most recent years? (Q16)



Q17
Ag producers who lease land were asked three new questions in the 2020 survey. The first questions asked what is the leased land used for?
Nearly two-thirds of respondents indicated they use their leased land for livestock (62%) and just over half (52%) use the land for haying. Over one-quarter (29%) use leased land for vegetable production while one in ten respondents who lease land (10%) use it for housing or forest-use land. Farms that are 26 acres or more are more likely to lease land for Haying and Livestock whereas the farms less than 25 acres have a wider variety of leased land usage (see table xx).

Figure 9. What is the leased land used for? (Q17) 2020 only

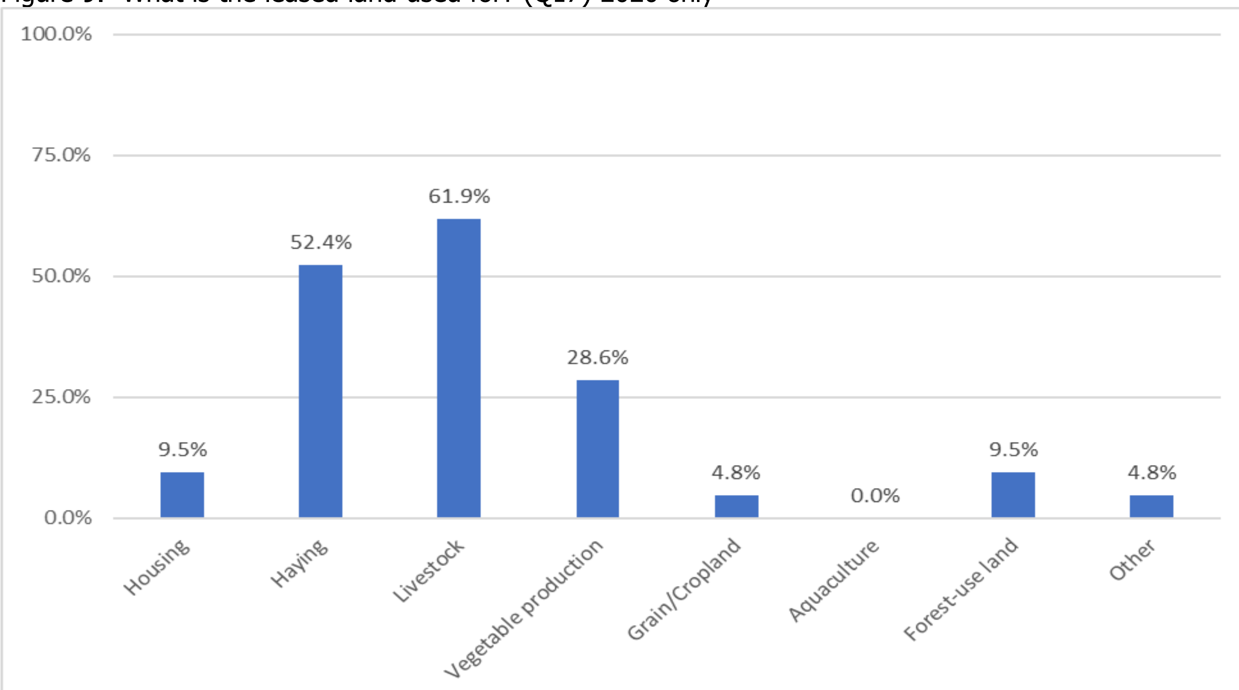


Table 16. What is the leased land used for by Farm size (Q17) 2020 only

	Less than 10 acres		10 - 25 acres		26 - 75 acres		More than 75 acres		Total	
	#	% checked	#	% checked	#	% checked	#	% checked	#	% checked
Housing	0	0.0%	1	20.0%	0	0.0%	1	12.5%	2	9.5%
Haying	0	0.0%	1	20.0%	4	66.7%	6	75.0%	11	52.4%
Livestock	0	0.0%	3	60.0%	5	83.3%	5	62.5%	13	61.9%
Vegetable production	2	100.0%	3	60.0%	1	16.7%	0	0.0%	6	28.6%
Grain/Cropland	0	0.0%	1	20.0%	0	0.0%	0	0.0%	1	4.8%
Aquaculture	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Forest-use land	0	0.0%	2	40.0%	0	0.0%	0	0.0%	2	9.5%
Other	1	50.0%	0	0.0%	0	0.0%	0	0.0%	1	4.8%

Table 17. What is the leased land used for? "Other" comments (Q17)

2020	Cut Flower production

Q18
Close to two-thirds of respondents who lease land (60%) indicate they have an informal lease (verbal contracts, general understanding, or handshake agreement). The remaining forty percent of people replied they have a formal lease (written contracts or written agreements).

Figure 10. Is your lease formal or informal? (Q18) 2020 survey only

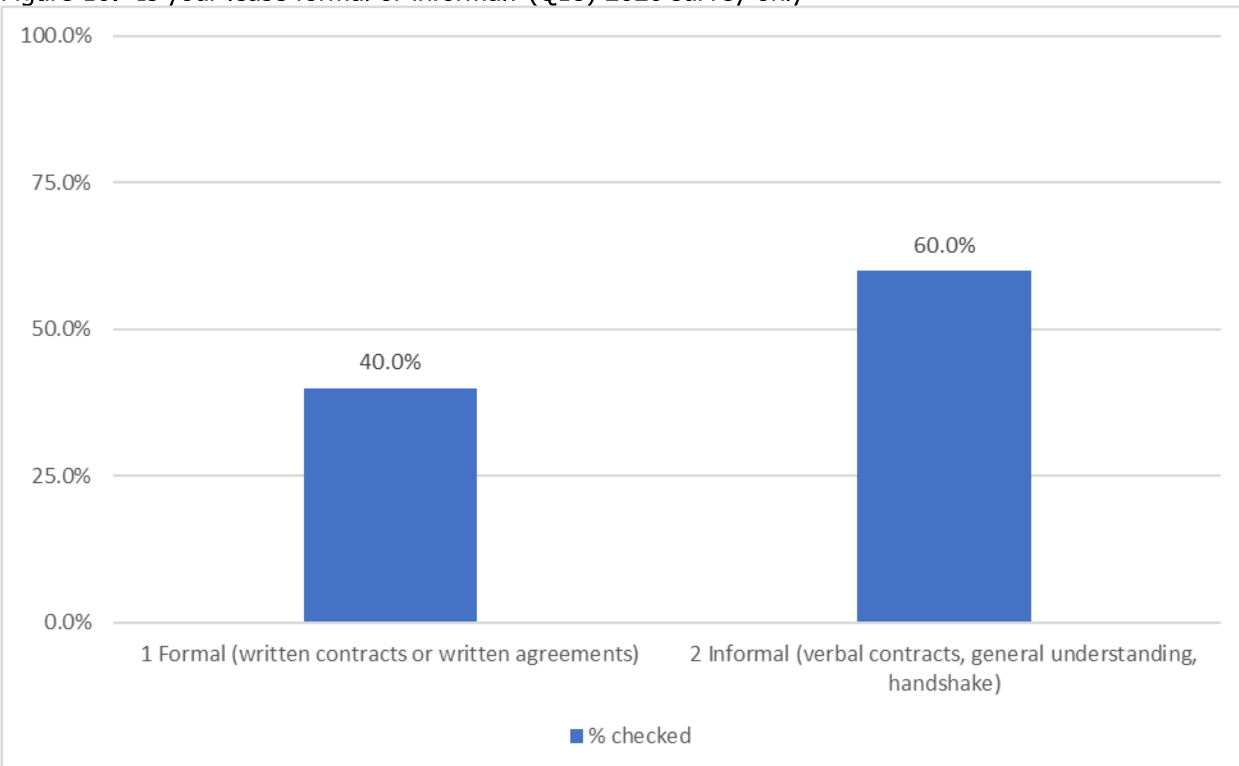


Table 18. Is your lease formal or informal? (Q18) 2020 only

	number	% checked
1 Formal (written contracts or written agreements)	8	40.0%
2 Informal (verbal contracts, general understanding, handshake)	12	60.0%

When looking at the type of lease by farm size, we see that smaller farms are more likely to have an informal lease than larger farms.

Table 19. Type of Lease by Farm Size (Q18) 2020 only

	Less than 10 acres		10 - 25 acres		26 - 75 acres		More than 75 acres	
	#	Percent	#	Percent	#	Percent	#	Percent
1 Formal (written contracts or written agreements)	0	0%	2	40%	2	33.3%	4	57.1%
2 Informal (verbal contracts, general understanding, handshake)	2	100%	3	60%	4	66.7%	3	42.9%

Q19
Over half (57%) of respondents checked the 'No rent' option when asked how they pay for leased land. Forty-eight percent pay a Lease fee and one-third (33%) indicated that they use Trade to help pay for leased land. Larger farms, which are more likely to lease land, also are more likely to use a variety of ways to pay for the leased land.

Figure 11. How do you pay for the leased land? (Q19) 2020 only

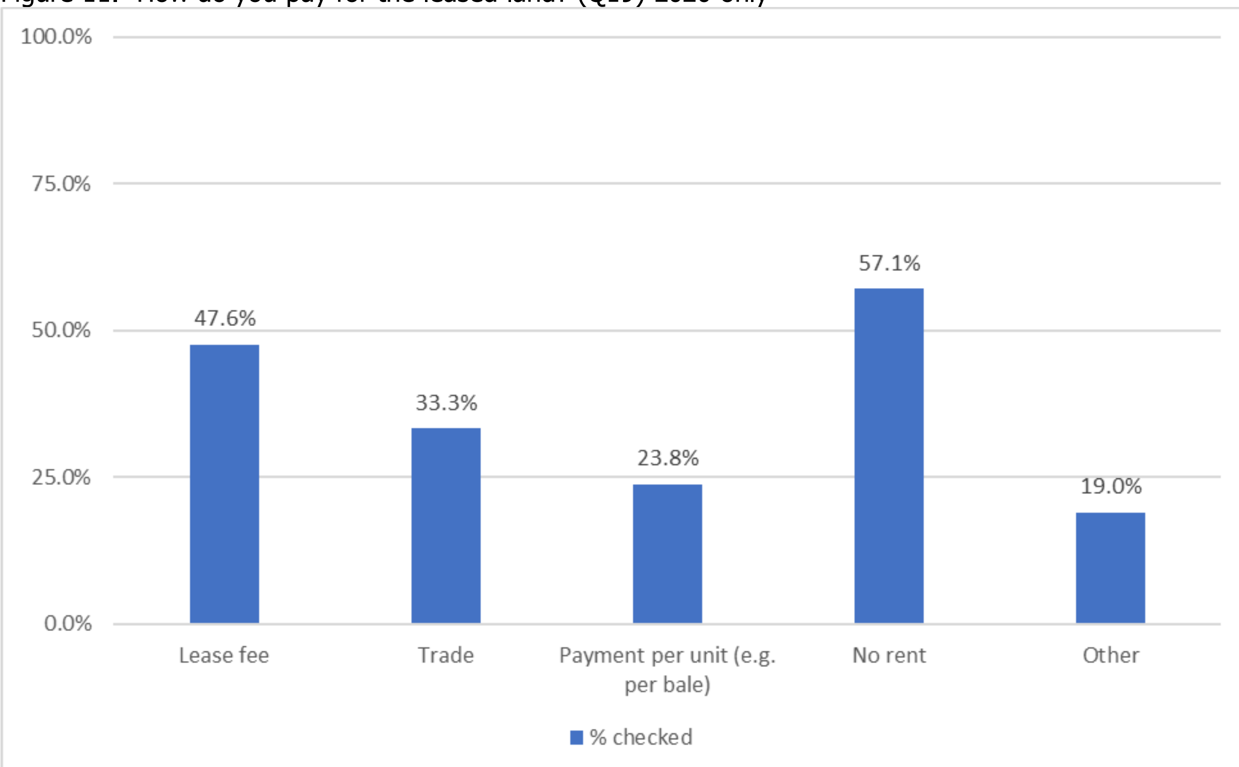


Table 20. How do you pay for the leased land? (Q19) 2020 only

	number	% checked
Lease fee	10	47.6%
Trade	7	33.3%
Payment per unit (e.g. per bale)	5	23.8%
No rent	12	57.1%
Other	4	19.0%

Table 21. How do you pay for the leased land by Farm size (Q19)

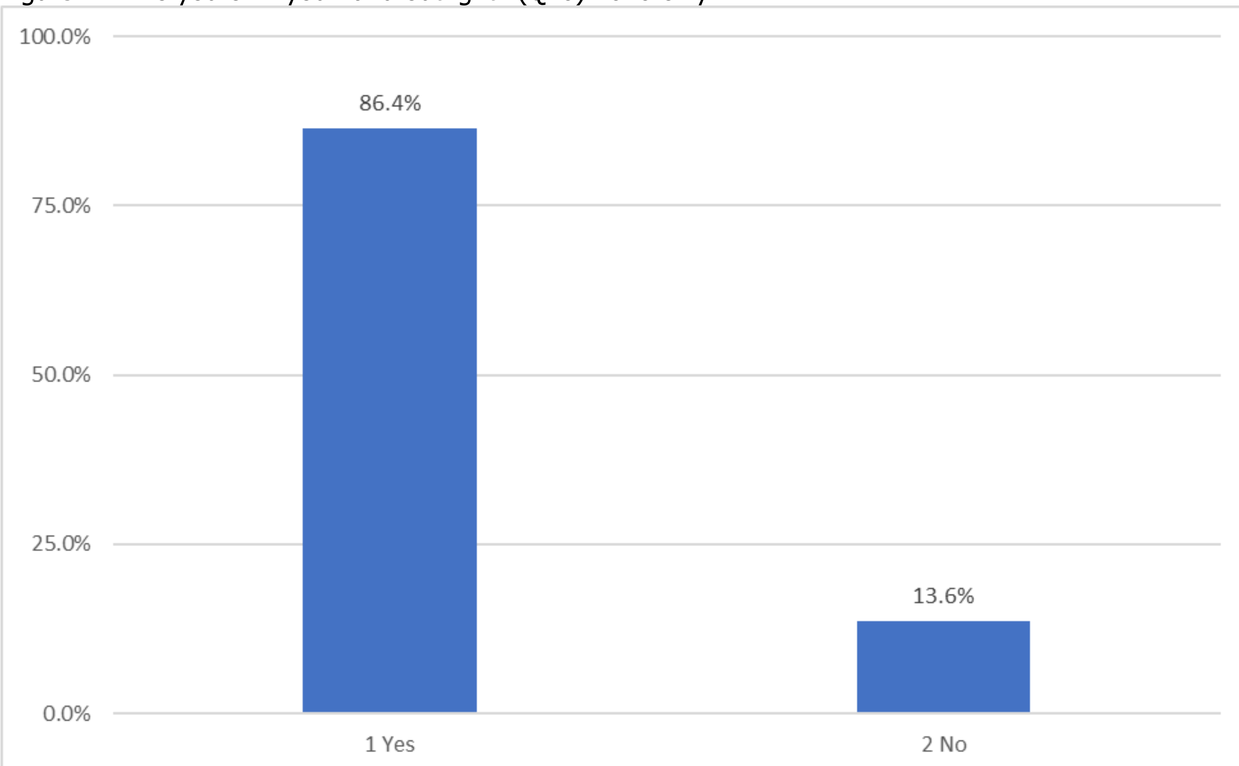
	1 Less than 10 acres		2 10 - 25 acres		3 26 - 75 acres		4 More than 75 acres		Total	
	#	percent	#	percent	#	percent	#	percent	#	percent
Q19A Lease fee	0	0.0%	1	20.0%	2	33.3%	7	87.5%	10	47.6%
Q19B Trade	0	0.0%	0	0.0%	1	16.7%	6	75.0%	7	33.3%
Q19C Payment per unit (e.g. per bale)	0	0.0%	0	0.0%	0	0.0%	5	62.5%	5	23.8%
Q19D No rent	1	50.0%	3	60.0%	3	50.0%	5	62.5%	12	57.1%
Q19E Other, please describe:	1	50.0%	1	20.0%	2	33.3%	0	0.0%	4	19.0%

Table 22. How do you pay for the leased land? "Other" comments (Q19)

2020	Soil health bank account
2020	Not really lease, employed to farm
2020	It wasn't an option but I have both formal written agreements and handshake agreements
2020	Pay property taxes

Q20
Nearly nine out of ten respondents (86%) marked that they own their land outright.

Figure 12. Do you own your land outright? (Q20) 2020 only



Q22
From the 2017 survey, more ag producers (46%) have less than $10,000 in gross annual sales than from the 2020 survey (40%). In 2017, more respondents (26%) indicated they had over $50,000 in sales than in the 2020 responses (21%).

Table 23. What were your total gross annual sales in 2015/2019 (collapsed)? (Q22)

	2017		2020	
	Number	Percent	Number	Percent
Small (Less than $10,000)	23	46.0%	21	39.6%
Medium ($10,000 - $49,999)	14	28.0%	21	39.6%
Large ($50,000 or more)	13	26.0%	11	20.8%

Q23
Over two-thirds of ag producers responded that they have less than $10,000 in net profit (72% - 2017, 70% - 2020). Only one respondent in 2017 and two in 2020 classify themselves as having more than $50,000 in net profit.

Table 24. What was your net profit in 2015/2019 (collapsed)? (Q23)

	2017		2020	
	Number	Percent	Number	Percent
Small (Less than $10,000)	34	72.3%	35	70.0%
Medium ($10,000 - $49,999)	12	20.3%	13	26.0%
Large ($50,000 or more)	1	1.7%	2	4.0%

Q24
Taxes paid in 2019 had the most respondents in the $1,000 - $2,499 (25%) and $2,500 - $4,999 (27%) categories.

Table 25. How much did you pay in taxes in 2019? (Q24) 2020 only

	2020	
	Number	Percent
Less than $1	5	11.4%
$1 to $1,000	5	11.4%
$1,000 to $2,499	11	25.0%
$2,500 to $4,999	12	27.3%
$5,000 to $9,999	5	11.4%
$10,000 to $19,999	5	11.4%
$20,000 to$24,999	0	0.0%
$25,000 to $39,999	1	2.3%
$40,000 to $49,999	0	0.0%
$50,000 to $99,999	0	0.0%
$100,000 to $249,999	0	0.0%
$250,000 to $499,999	0	0.0%
$500,000 or more	0	0.0%

Q25
One-third of ag producers indicated the estimated value of food provided to family and others that was not exchanged for money was less the $999 (35%).

Table 26. In 2019, what is the estimated value of food you provided for your family and others that was not exchanged for money? (Q25) 2020 only

	2020	
	number	percent
$100 - $999	17	35.4%
$1000 - $1999	10	20.8%
$2000 - $2999	6	12.5%
$3000 - $3999	4	8.3%
$4000 - $4999	0	0.0%
$4000 - $4999	2	4.2%
$6000 - $6999	3	6.3%
$7000 - $7999	1	2.1%
$8000 - $8999	1	2.1%
$9000 - $9999	0	0.0%
$10,000 or more	4	8.3%

Q26
In both 2017 and 2020, the most common revenue source used by ag producers responding to the survey was the vegetable, herbs, melons, potatoes category (2017 - 47%, 2020 - 65%). Fruits, tree nuts, berries was the second most common category in both survey years (2017 – 45%, 2020 – 35%). Animal fiber was used by 18 respondents in 2017 while "other" sources was the third most common in 2020. These "other" sources include: Residential; horses; Fallow; Biochar; breeding stock; Horse Boarding; Wine; leased for hay and grazing; Tanned hides, horns/skulls, breeding stock; Compost/mulch; all animals, lamb, goat, cattle and pigstle; compost; Herbal skin care product from herbs grown here; and sheepskins, goatskins. The top 5 used revenue sources from each year are marked in yellow in Table 20 below.

Table 27. Revenue Source Used (Q26)

	2017			2020		
	Count	Percent	Rank	Count	Percent	Rank
Q26a. Vegetables, Herbs, Melons, Potatoes	23	46.9%	1	31	64.6%	1
Q26b. Cattle and Calves	12	24.5%	5	10	20.8%	5
Q26c. Hogs and Pigs	7	14.3%	9	3	6.3%	14
Q26d. Poultry				7	14.6%	9
Q26e. Meat				9	18.8%	7
Q26f. Eggs				11	22.9%	4
Q26g. Agritourism	5	10.2%	10	6	12.5%	11
Q26h. Fruits, Tree Nuts, Berries	22	44.9%	2	17	34.7%	2
Q26i. Grain, Hay, Oilseeds, dry beans, dry peas	13	26.5%	4	6	12.5%	10
Q26j. Nursery/Flowers	10	20.4%	6	10	20.8%	6
Q26k. Dairy (Cow)	2	4.1%	11	1	2.1%	17
Q26l. Dairy (Goat)				3	6.3%	15
Q26m. Dairy (Sheep)				2	4.2%	16
Q26n. Animal fiber	18	36.7%	3	7	14.6%	8
Q26o. Lamb				6	12.2%	12
Q26p. Services (haying, fence-building, plowing, etc)	9	18.4%	7	3	6.3%	13
Q26q. Other (specify)	9	18.4%	8	12	25.0%	3

When looking at farm size and use of different revenue sources, we see that farms with more than 26 acres are more likely to use ones related to livestock. In the table below, the percent listed is the number of ag producers in that farm size category divided by the total number in each row. The cells highlighted in yellow show where more than 50% of respondents are in that category.

Table 28. Revenue source used by Farm size (Q26)

		Less than 10 acres		10 - 25 acres		26 - 75 acres		More than 75 acres		Total	
		# Use	Percent	# Use	Percent	# Use	Percent	# Use	Percent	# Use	Percent
2017	Q26a used: Vegetables, Herbs, Melons, Potatoes	7	31.8%	5	22.7%	6	27.3%	4	18.2%	22	100.0%
	Q26b used: Cattle and Calves	0	0.0%	1	9.1%	2	18.2%	8	72.7%	11	100.0%
	Q26c used: Hogs and Pigs	0	0.0%	1	14.3%	4	57.1%	2	28.6%	7	100.0%
	Q26d used: Poultry	-	-	-	-	-	-	-	-	-	-
	Q26e_used Revenue source used: Meat	-	-	-	-	-	-	-	-	-	-
	Q26f used: Eggs	-	-	-	-	-	-	-	-	-	-
	Q26g used: Agritourism	2	40.0%	1	20.0%	1	20.0%	1	20.0%	5	100.0%
	Q26h used: Fruits, Tree Nuts, Berries	5	23.8%	5	23.8%	10	47.6%	1	4.8%	21	100.0%
	Q26i used: Grain, Hay, Oilseeds, dry beans, dry peas	1	8.3%	4	33.3%	4	33.3%	3	25.0%	12	100.0%
	Q26j used: Nursery/Flowers	2	22.2%	1	11.1%	5	55.6%	1	11.1%	9	100.0%
	Q26k used: Dairy (Cow)	0	0.0%	0	0.0%	2	100.0%	0	0.0%	2	100.0%
	Q26l used: Dairy (Goat)	-	-	-	-	-	-	-	-	-	-
	Q26m used: Dairy (Sheep)	-	-	-	-	-	-	-	-	-	-
	Q26n used: Animal fiber	2	11.1%	0	0.0%	10	55.6%	6	33.3%	18	100.0%
	Q26o used: Lamb	-	-	-	-	-	-	-	-	-	-
	Q26p used: Services (haying, fence-building, plowing, etc)	2	22.2%	1	11.1%	3	33.3%	3	33.3%	9	100.0%
	Q26q used: Other (specify)	0	0.0%	1	12.5%	5	62.5%	2	25.0%	8	100.0%
2020	Q26a used: Vegetables, Herbs, Melons, Potatoes	9	29.0%	13	41.9%	4	12.9%	5	16.1%	31	100.0%
	Q26b used: Cattle and Calves	0	0.0%	2	20.0%	2	20.0%	6	60.0%	10	100.0%
	Q26c used: Hogs and Pigs	0	0.0%	0	0.0%	0	0.0%	3	100.0%	3	100.0%
	Q26d used: Poultry	1	14.3%	1	14.3%	1	14.3%	4	57.1%	7	100.0%
	Q26e_used Revenue source used: Meat	1	11.1%	3	33.3%	1	11.1%	4	44.4%	9	100.0%
	Q26f used: Eggs	1	9.1%	6	54.5%	1	9.1%	3	27.3%	11	100.0%
	Q26g used: Agritourism	1	16.7%	3	50.0%	0	0.0%	2	33.3%	6	100.0%
	Q26h used: Fruits, Tree Nuts, Berries	5	29.4%	8	47.1%	3	17.6%	1	5.9%	17	100.0%
	Q26i used: Grain, Hay, Oilseeds, dry beans, dry peas	0	0.0%	1	16.7%	3	50.0%	2	33.3%	6	100.0%
	Q26j used: Nursery/Flowers	3	30.0%	5	50.0%	1	10.0%	1	10.0%	10	100.0%
	Q26k used: Dairy (Cow)	0	0.0%	0	0.0%	1	100.0%	0	0.0%	1	100.0%
	Q26l used: Dairy (Goat)	1	33.3%	0	0.0%	2	66.7%	0	0.0%	3	100.0%
	Q26m used: Dairy (Sheep)	1	50.0%	0	0.0%	1	50.0%	0	0.0%	2	100.0%
	Q26n used: Animal fiber	1	14.3%	1	14.3%	3	42.9%	2	28.6%	7	100.0%
	Q26o used: Lamb	0	0.0%	0	0.0%	4	66.7%	2	33.3%	6	100.0%
	Q26p used: Services (haying, fence-building, plowing, etc)	1	33.3%	1	33.3%	0	0.0%	1	33.3%	3	100.0%
	Q26q used: Other (specify)	2	16.7%	2	16.7%	5	41.7%	3	25.0%	12	100.0%

On average, vegetables, herbs, melons, and potatoes has the highest percentage of market value in both the 2017 and 2020 surveys (22.6% - 2017, 35.5% - 2020). Animal fiber had the second highest percentage in 2017 (17.5%) but was only the tenth most in 2020. Fruits, tree nuts, and berries was the third largest revenue source in 2017 (12.9%) and second in 2020 (10.8%). Cells highlighted in yellow indicate the top five largest average sources of revenue each year. Overall, the 2020 survey shows a broader distribution but that is likely attributable to having more categories than the 2017 survey.

Table 29. Average percentage of market value for revenue sources (Q26)

	2017		2020	
	Mean	Rank	Mean	Rank
Q26aa: Vegetables, Herbs, Melons, Potatoes	22.6	1	35.5	1
Q26ba: Cattle and Calves	9.0	5	7.1	4
Q26ca: Hogs and Pigs	2.2	10	0.8	16
Q26da: Poultry*	-	-	0.9	15
Q26da_x: Poultry and eggs**	4.3	9	-	-
Q26ea: Meat*	-	-	3.8	8
Q26fa: Eggs*	-	-	3.5	9
Q26ga: Agritourism	2.2	11	3.2	11
Q26ha: Fruits, Tree Nuts, Berries	12.9	3	10.8	2
Q26ia: Grain, Hay, Oilseeds, dry beans, dry peas	6.6	6	5.3	7
Q26ja: Nursery/Flowers	5.2	7	7.0	5
Q26ka: Dairy (Cow)	0.7	12	0.4	17
Q26la: Dairy (Goat)	0.0	13	3.0	12
Q26ma: Dairy (Sheep)*	-	-	1.0	14
Q26na: Animal fiber	17.5	2	3.4	10
Q26oa: Lamb*	-	-	6.3	6
Q26pa: Services (haying, fence-building, plowing, etc)	5.1	8	1.7	13
Q26qa: Other (specify)	9.5	4	9.4	3

*Not asked in 2017
**Category separated in 2020

The highest average percentage of land farm for 2017 was for Cattle and calves as well as for Animal fiber (both at 22.1%). The highest average percent of land used in 2020 (21.7%) was for "Other" products. The top five categories for each year are highlighted in yellow in Table 23 below.

Table 30. Average percentage of land farmed for revenue sources (Q26)

	2017		2020	
	2017	2017 rank	2020	2020 rank
Q26ab: Vegetables, Herbs, Melons, Potatoes	12.3	5	21.1	2
Q26bb: Cattle and Calves	22.1	1	14.4	3
Q26cb: Hogs and Pigs	3.0	9	0.5	15
Q26db: Poultry*	-	-	0.2	17
Q26eb: Meat*	-	-	9.1	5
Q26fb: Eggs*	-	-	0.6	14
Q26gb: Agritourism	5.8	7	0.3	16
Q26hb: Fruits, Tree Nuts, Berries	14.3	3	5.9	7
Q26ib: Grain, Hay, Oilseeds, dry beans, dry peas	11.4	6	11.1	4
Q26jb: Nursery/Flowers	2.6	10	5.7	8
Q26kb: Dairy (Cow)	0.4	12	1.3	12
Q26lb: Dairy (Goat)	1.9	11	1.7	11
Q26mb: Dairy (Sheep)*	-	-	5.1	9
Q26nb: Animal fiber	22.1	1	2.8	10
Q26ob: Lamb*	-	-	7.0	6
Q26pb: Services (haying, fence-building, plowing, etc)	3.6	8	0.8	13
Q26qb: Other (specify)	13.1	4	21.7	1

*Not asked in 2017

Table 31. In 2015/2019, what was the percentage of your total market value for each of these revenue sources? "Other" comments (Q26)

2017	compost/organic materials
2017	home and pastures
2017	Unknown-Farm leased
2017	On-farm consumables
2017	Pasture
2017	Soil amendments
2017	horses
2017	horse boarding
2017	beef
2017	forestry
2017	grapes
2020	all animals, lamb, goat, cattle and pigstle

2020	Biochar
2020	breeding stock
2020	compost
2020	Compost/mulch
2020	Fallow
2020	Herbal skin care product from herbs grown here
2020	Horse Boarding
2020	horses
2020	leased for hay and grazing
2020	residential
2020	sheepskins, goatskins
2020	Tanned hides, horns/skulls, breeding stock.
2020	wine

Q27
About one-quarter of ag producers (27%) indicated they need assistance to maintain production or put land under production.

Figure 13. Do you need assistance to maintain production or put your land under production? (Q27) 2020 only

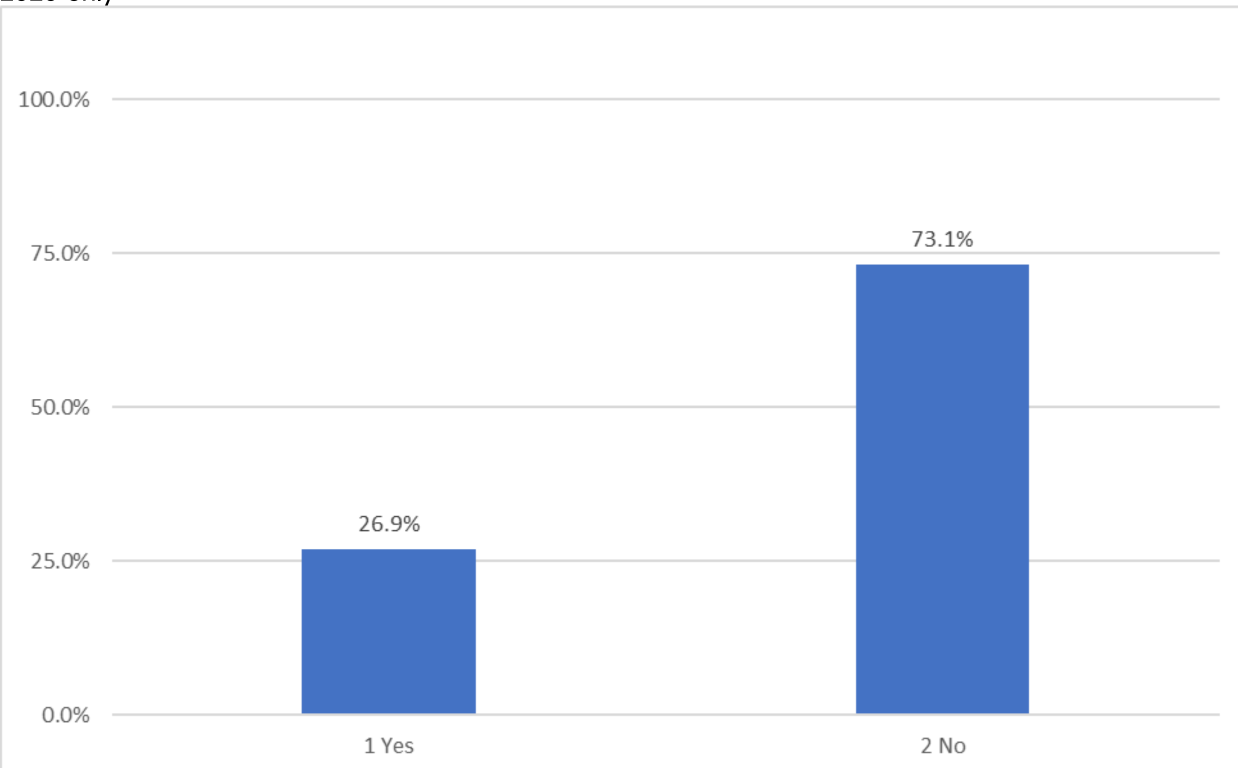


Table 32. Do you need assistance to maintain production or put your land under production? (Q27) 2020 only

	number	percent
Yes	14	26.9%
No	38	73.1%

Q28
Respondents who indicated they needed assistance in the previous question were then asked if they needed support for Farm succession, Support to lease your land, and Put a conservation easement on your land. Just under half of these respondents indicated that they would need support for farm succession (44%) and support to lease their land (47%). One-third of these respondents (33%) marked that they need support for putting a conservation easement on their land.

Figure 14. Do you need support for any of the following actions? (Q28) 2020 only

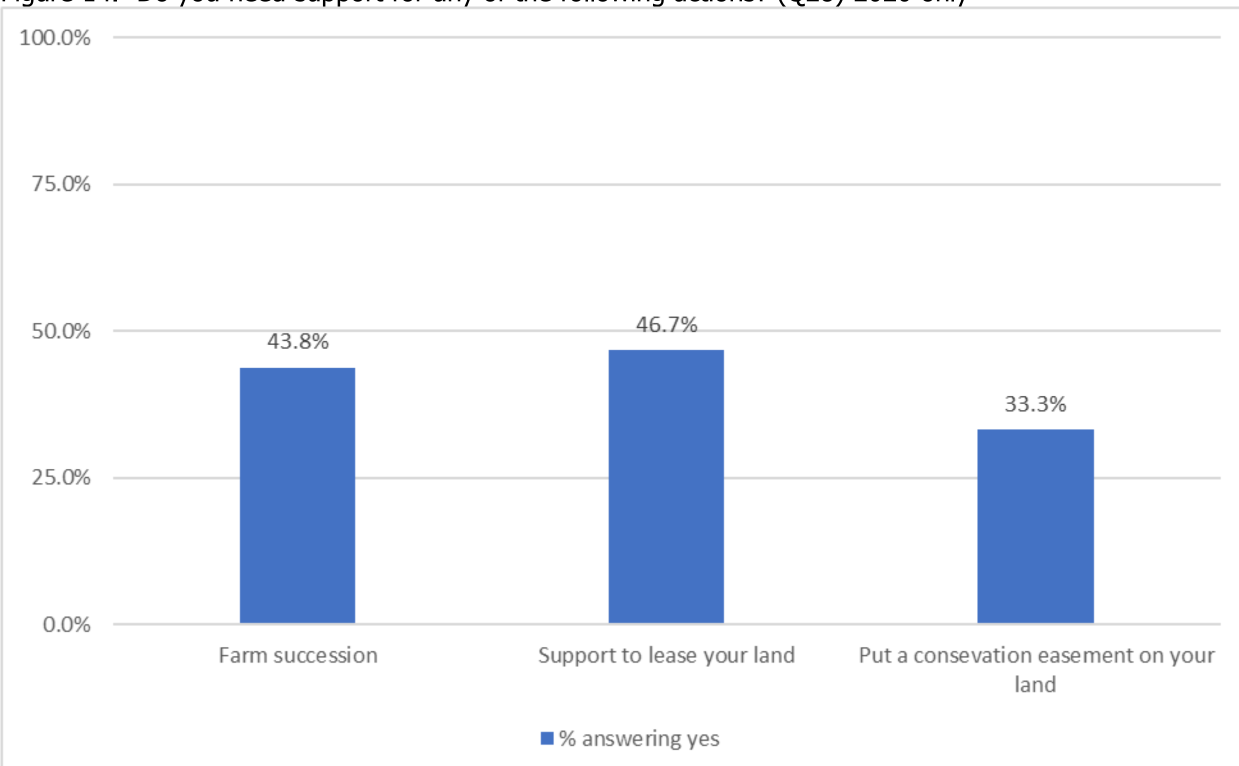


Table 33. Do you need support for any of the following actions? (Q28) 2020 only

	number	percent
Farm succession	7	43.8%
Support to lease your land	7	46.7%
Put a conservation easement on your land	5	33.3%

Q29
Providing mentorship (62%), being part of an agricultural producers cooperative (51%) and voluntary gathering of observational data on water quality, soil health, and biodiversity (51%) were the most commonly checked items when ag producers were asked if they were interested in collection data on there farm or collaborating with fellow farmers.

Figure 15. Are you interested in collecting data on your farm or collaborating with fellow farmers on any of the following? (Q29) 2020 only

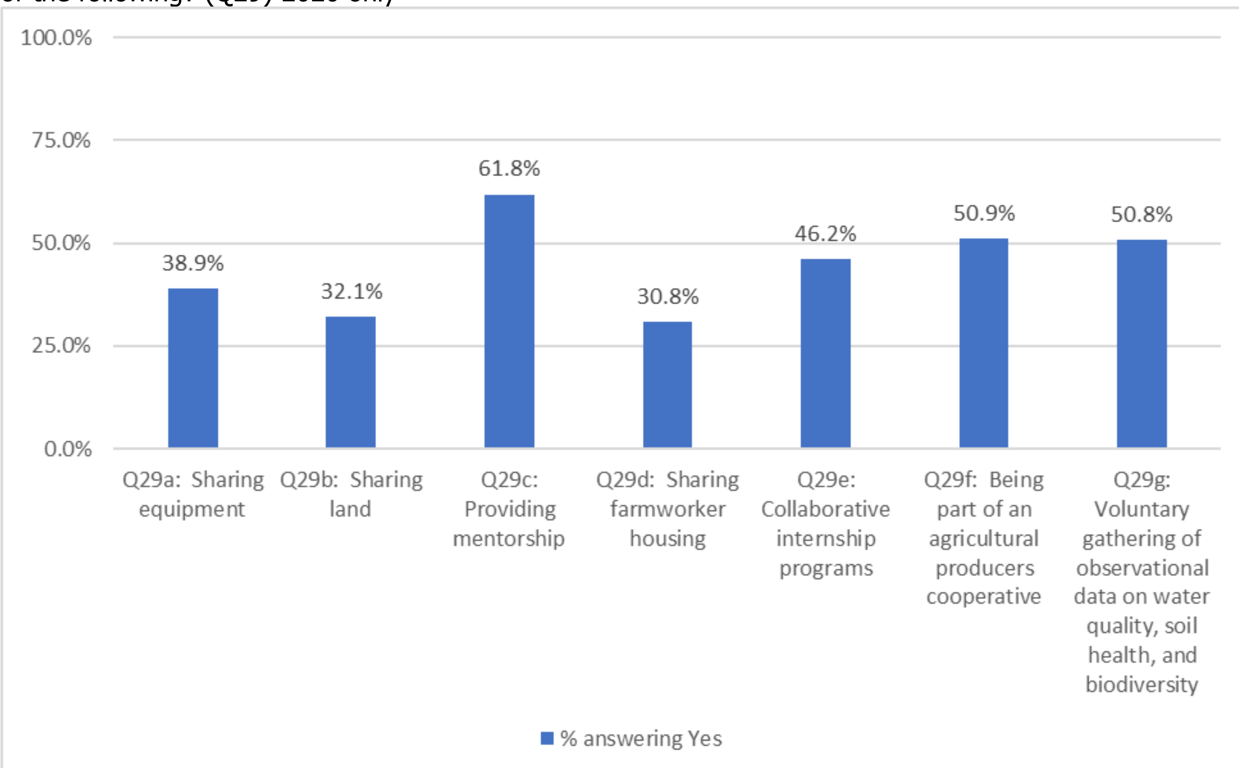


Table 34. Are you interested in collecting data on your farm or collaborating with fellow farmers on any of the following? (Q29)

	number	percent
Sharing equipment	21	38.9%
Sharing land	17	32.1%
Providing mentorship	34	61.8%
Sharing farmworker housing	16	30.8%
Collaborative internship programs	24	46.2%
Being part of an agricultural producers cooperative	27	50.9%
Voluntary gathering of observational data on water quality, soil health, and biodiversity	6	50.8%

Q31
Four out of ten (40%) of farms or ranches were primarily or fully female-owned. Only one out of ten (11%) farms or ranches are owned by a veteran. Minority-owned farms represent only 2% of respondents.

Figure 16. Is this farm or ranch primarily or fully... (Q31)

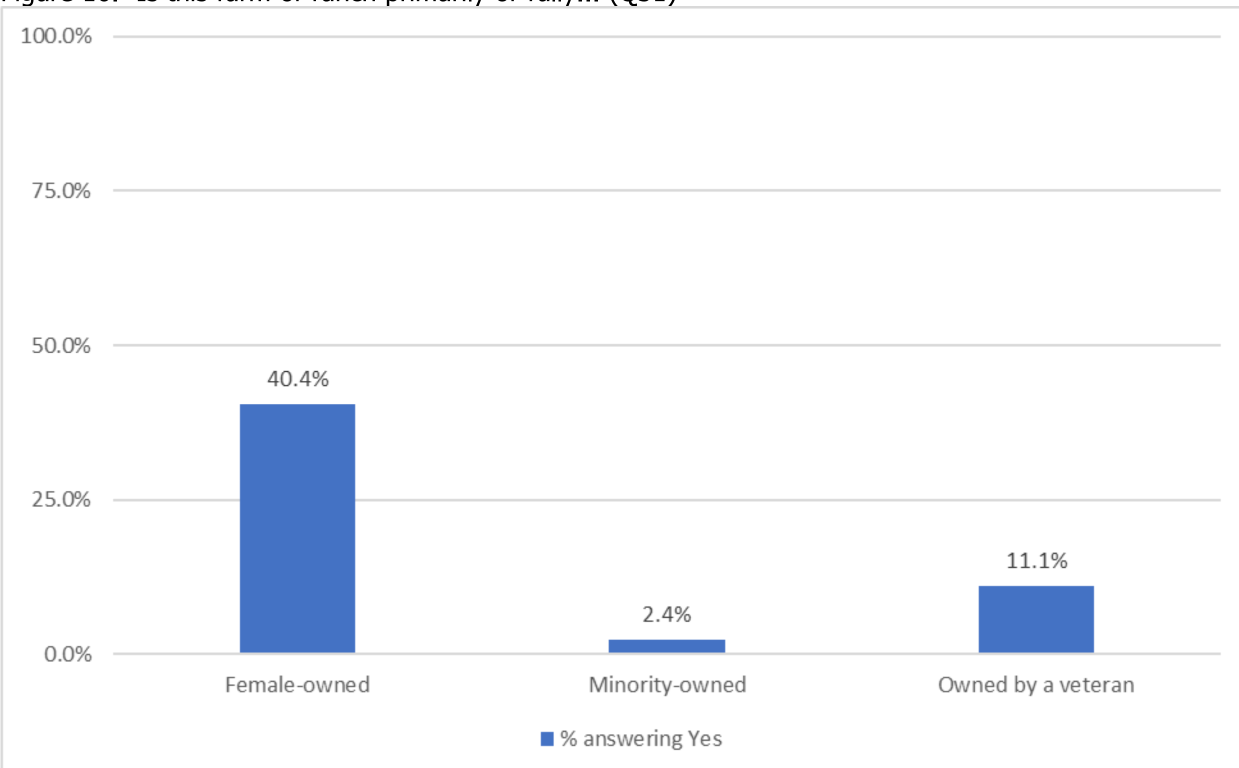


Table 35. Is this farm or ranch primarily or fully... (Q31)

	number	percent
Female-owned	21	40.4%
Minority-owned	1	2.4%
Owned by a veteran	5	11.1%

Q32
In the 2017 survey, nearly half of respondents (48%) fall into the mid-career category (11-25 years) while less than one-fifth (16%) were categorized as early career (0-10 years). In the 2020 survey, the percentage in each category was much closer in each group: one-quarter in early career (27%), one-third (33%) in mid-career and forty percent in late career.

Figure 17. How long have you been the primary operator of your farm? (Q32)

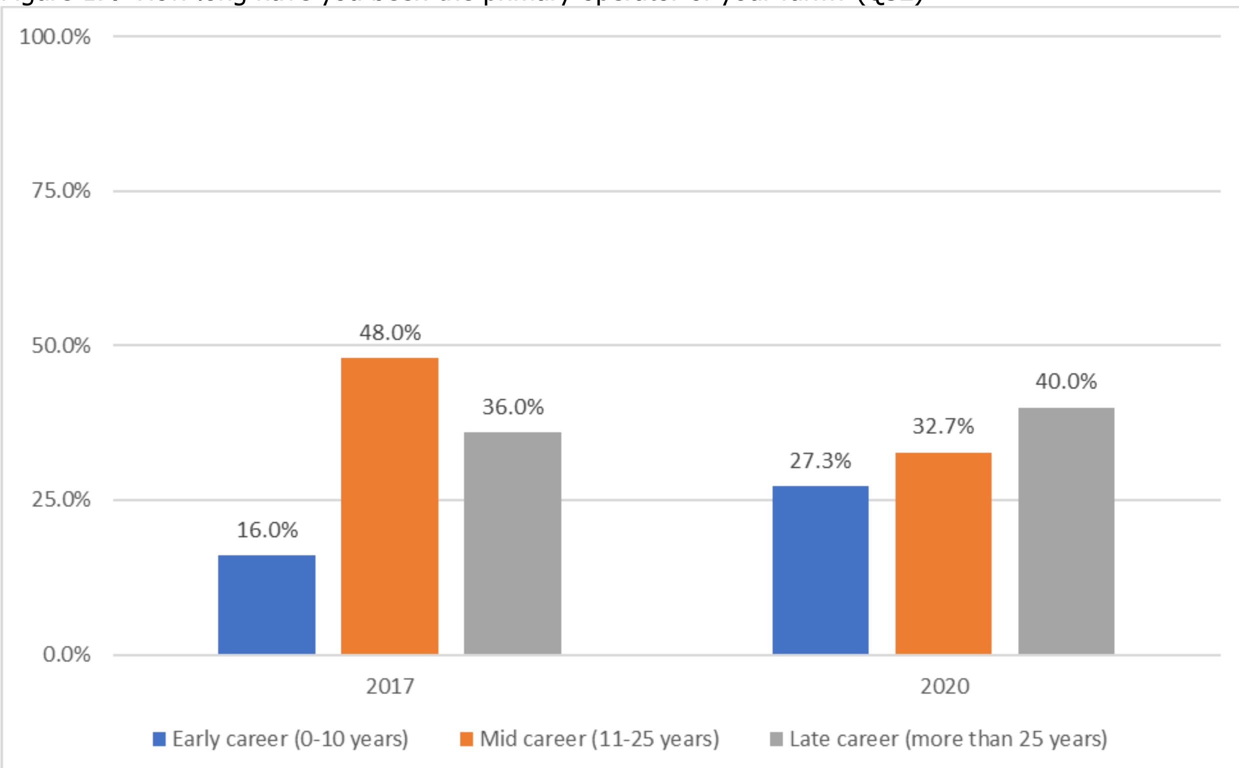


Table 36. How long have you been the primary operator of your farm? (Q32)

	2017		2020	
	number	percent	number	percent
Early career (0-10 years)	8	16.0%	15	27.3%
Mid career (11-25 years)	24	48.0%	18	32.7%
Late career (more than 25 years)	18	36.0%	22	40.0%

Q33
In 2020, the results show a higher percentage of respondents who are under 35 (2.0% up to 9.1%) and 36 – 50 years of age (7.8% up to 16.4%). The percent of farmers in the 51 – 60 age range saw the largest decline from 2017 to 2020 (29.4% down to 20.0%. Producers in the 61-70 year old category and the over 70 years category remained relatively unchanged.

Figure 18. Approximate age in years (based on year born) (Q33)

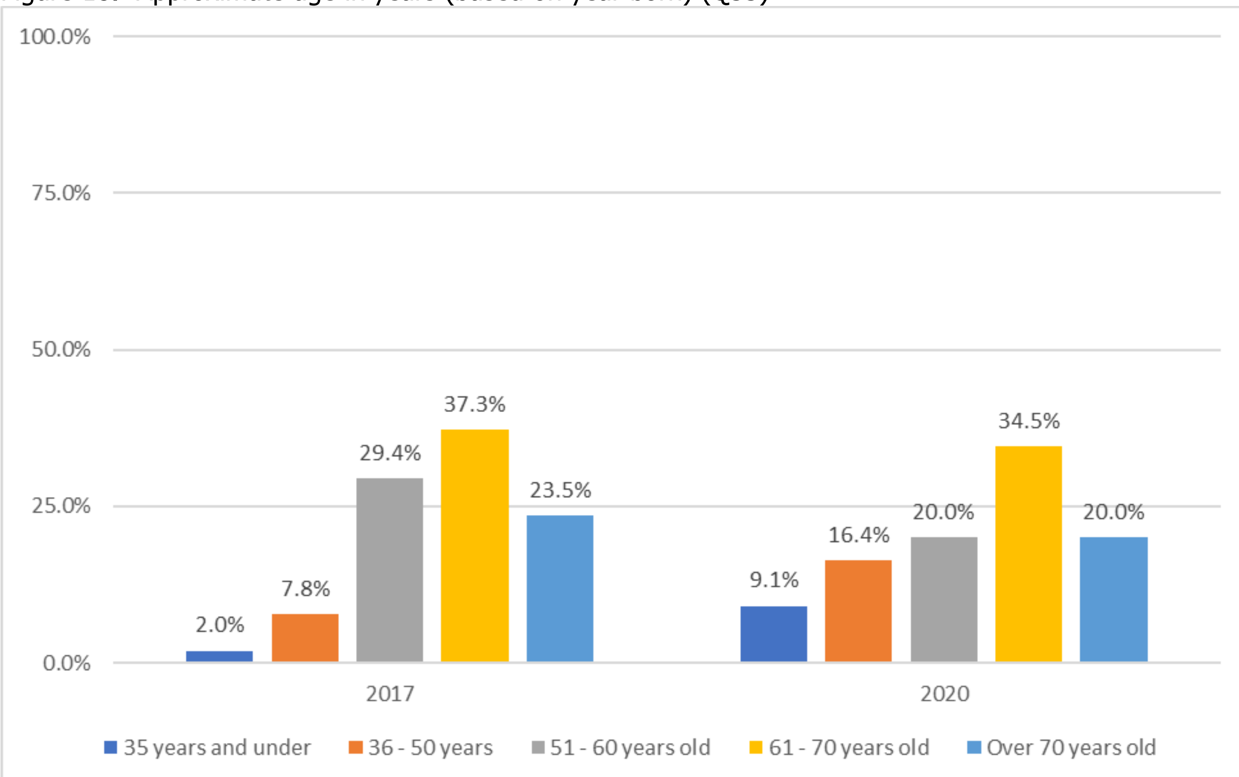


Table 37. How many more years do you plan to continue farming? (Q33)

	2017		2020	
	number	percent	number	percent
35 years and under	1	2.0%	5	9.1%
36 - 50 years	4	7.8%	9	16.4%
51 - 60 years old	15	29.4%	11	20.0%
61 - 70 years old	19	37.3%	19	34.5%
Over 70 years old	12	23.5%	11	20.0%

Q34.
Between the 2017 survey and the 2020 survey, the number of respondents indicating they would be farming for five more years or less and 11-15 years both declined. Respondents indicating 11-15 years declined from 28% in 2017 to 9% in 2020; those saying five years or less of farming decreased from 28% in 2017 to 19% in 2020. We saw increases in farmers planning to work 6-10 more years (8% more), 16-20 years (16% higher), and more than 20 years (6% increase).

Figure 19. How many more years do you plan to continue farming? (Q34)

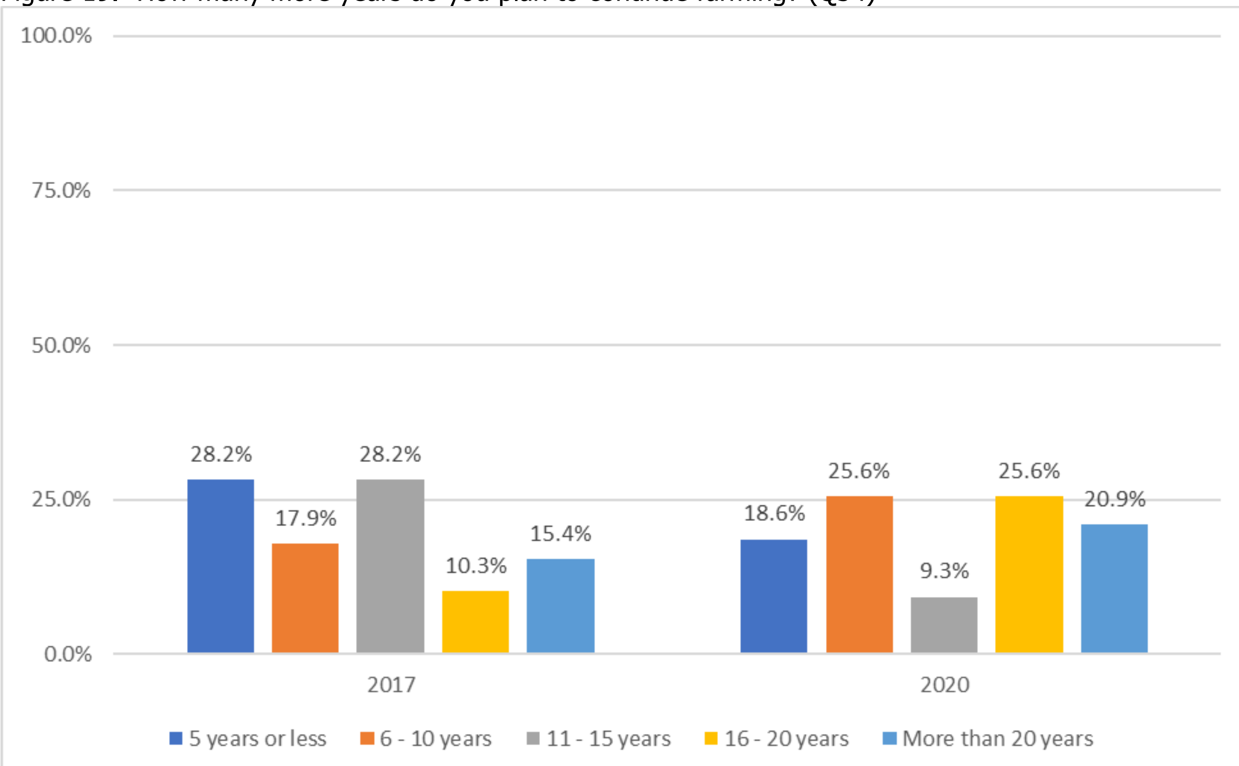


Table 38. How many more years do you plan to continue farming? (Q34)

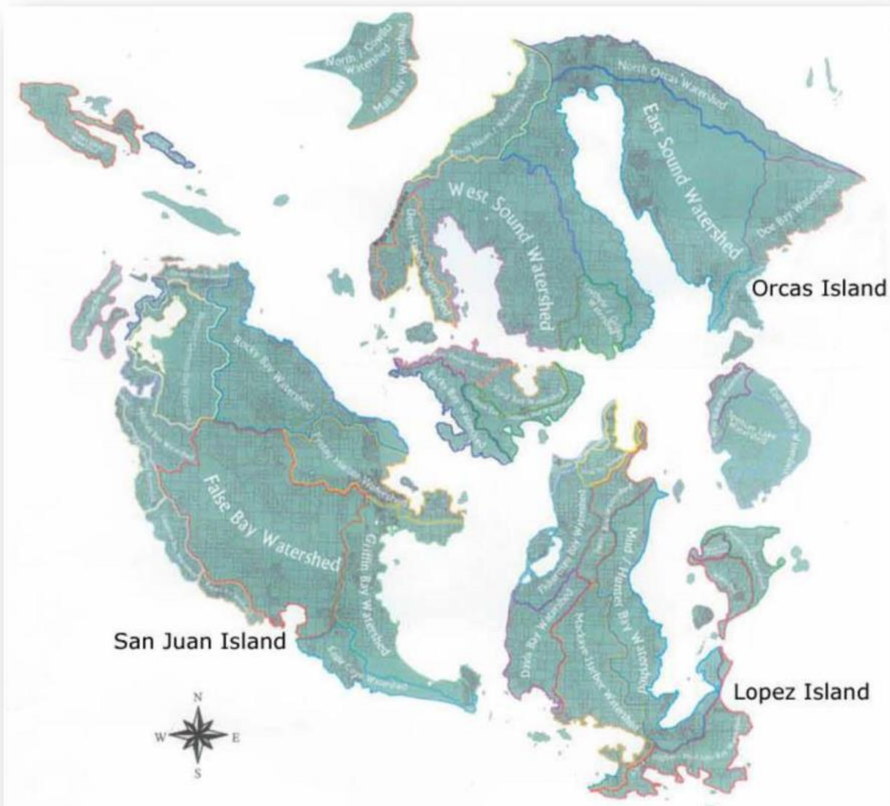
	2017		2020	
	Number	Percent	Number	Percent
5 years or less	11	28.2%	8	18.6%
6 - 10 years	7	17.9%	11	25.6%
11 - 15 years	11	28.2%	4	9.3%
16 - 20 years	4	10.3%	11	25.6%
More than 20 years	6	15.4%	9	20.9%

Table 39. How many more years do you plan to continue farming by age?

	35 years and under	36 - 50 years	51 - 60 years old	61 - 70 years old	Over 70 years old	Total
2017						
5 years or less	0	0	2	4	5	11
6 - 10 years	0	0	3	3	1	7
11 - 15 years	0	0	2	7	2	11
16 - 20 years	0	0	3	1	0	4
More than 20 years	0	3	3	0	0	6
Total	0	3	13	15	8	39
2020						
5 years or less	0	0	1	4	3	8
6 - 10 years	0	0	3	4	4	11
11 - 15 years	0	1	2	1	0	4
16 - 20 years	0	5	1	3	2	11
More than 20 years	2	3	1	3	0	9
Total	2	9	8	15	9	43

5. Questionnaire

Agricultural Viability in San Juan County
A Survey of Farmers



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San Juan Islands Conservation District
530 Guard Street, Friday Harbor, WA 98250
www.sanjuanislandscd.org
360-378-6621

SAN JUAN ISLANDS CONSERVATION DISTRICT
SAN JUAN COUNTY, WASHINGTON

Q01. Which of the following categories best describes your farm?

① Commercial farm (sell products or services) → Skip to Q03
② Non-commercial farm (no monetary sales of products or services) → Continue with Q02
③ Both commercial and non-commercial farm → Skip to Q03
④ Some other type, please describe: ____________________________
⑤ Not operating a farm (either commercial or non-commercial) → *Thank you, this survey is for farm operators only. Please mail the survey back in the envelope provided.*

Q02. Do you have any plans to become a commercial farm within the next 5 years?

① Yes
② No
③ Maybe or unsure

Q03. Which of the following categories best describes your role on the farm?

① Owner, but farm is managed by or leased to someone else
② Manage or lease a farm, but do not own
③ Owner and manager of the farm
④ Employee
⑤ Other arrangement, describe: ___________________________________

Q04. What percentage (monetary value) of your agricultural products in 2019 were marketed in each of the following ways? For any outlets you did not use, please check the box to the right in that row. SJC refers to San Juan County.

Market Outlet	Percentage of all your ag products marketed this way in 2019	Did not use this outlet in 2019
Farmer's Market	_______%	☐
SJC Food Cooperatives	_______%	☐
Outside SJC Food Cooperatives	_______%	☐
Community Support Agriculture (CSA)	_______%	☐
SJC Restaurants	_______%	☐
Outside SJC Restaurants	_______%	☐
SJC Grocery Stores	_______%	☐
Outside SJC Grocery Stores	_______%	☐
Farm Stands	_______%	☐
Web-based Sales	_______%	☐
Direct to Customer List	_______%	☐
Food Banks	_______%	☐
Puget Sound Food Hub	_______%	☐
Livestock Auction	_______%	☐
Schools	_______%	☐
Other	_______%	☐
Does not apply (not commercial farmer)		☐
Total: (total should equal 100%)	**= 100%**	

2

Q05. Of the agricultural crops that you grew in 2018 and 2019, what percentage did you grow for each of the following?

	2018	2019
Sale	_______%	_______%
Home consumption	_______%	_______%
Charitable donation	_______%	_______%
Other (describe) _______________	_______%	_______%
Total: (total should equal 100%)	**= 100%**	**= 100%**

Q06. Of the agricultural crops that you grew for sale in 2018 and 2019, what percentage were you able to sell?

	Less than 50%	50% to 74%	75% to 99%	100%
2018	1	2	3	4
2019	1	2	3	4

Q07. Is there anything you would like to comment on regarding selling your agricultural products? *Please explain.*

Q08. How much have each of the following issues been a challenge to farming in San Juan County for you over the last five years? *Please give one response in each row.*

	Extreme challenge	Challenge	Moderate challenge	Slight challenge	Not a challenge	Does not apply
Cost/availability of skilled farm labor	1	2	3	4	5	6
Cost of inputs	1	2	3	4	5	6
Access to farm machinery	1	2	3	4	5	6
Access to affordable farmland	1	2	3	4	5	6
Access to water	1	2	3	4	5	6
Access to markets	1	2	3	4	5	6
Access to business planning expertise or training	1	2	3	4	5	6
Access to farm management expertise or training	1	2	3	4	5	6
Cost of on-farm infrastructure	1	2	3	4	5	6
Farm worker housing	1	2	3	4	5	6
Access to capital/funds	1	2	3	4	5	6
Storage capacity	1	2	3	4	5	6
Season extension infrastructure	1	2	3	4	5	6
Food safety regulation	1	2	3	4	5	6
Land use regulation	1	2	3	4	5	6
Surveys wanting all my info	1	2	3	4	5	6
Other, list: _______________	1	2	3	4	5	6

3

Q09. Do you plan to maintain, expand, or decrease the scope of your operation within the next five years?

① Maintain → Skip to Q11
② Increase or Expand → Continue with Q10
③ Decrease → Skip to Q11
④ Not sure → Skip to Q11

Q10. If you were to increase the scope of your operation, how much need would you have in each of the following areas?

	Definite need ▼	Moderate need ▼	No need ▼	Not sure ▼
More capital	①	②	③	④
Grant support	①	②	③	④
Business plan support	①	②	③	④
Farm plan support	①	②	③	④
Additional labor	①	②	③	④
Farmworker housing	①	②	③	④
Access to more land	①	②	③	④
Access to water	①	②	③	④
Access to farm machinery/equipment	①	②	③	④
Access to reliable markets	①	②	③	④
Increased means of distribution	①	②	③	④
Access to USDA meat processing (cut & wrap)	①	②	③	④
Access to other processing/value added facilities (increased processing capacity)	①	②	③	④
Cold storage capacity	①	②	③	④
Dry storage capacity	①	②	③	④
Season extension infrastructure	①	②	③	④
Other, list: ____________________	①	②	③	④

Q11. Have you developed a business plan for your farm within the last five years, or since 2015?

① Yes
② No
③ Not sure

Q12. Have you ever developed a Farm Conservation Plan with the Conservation District or NRCS?

① Yes → Continue with Q13
② No → Skip to Q14
③ Not sure → Skip to Q14

Q13. In which year was your Farm Plan done?

_______ Year

4

Q14. Have you developed an Individual Stewardship Plan as part of the Voluntary Stewardship Program?

① Yes → Continue with Q15
② No → Skip to Q16

Q15. If you had a plan done before the Voluntary Stewardship Program was initiated in 2011, would you like to update it to an Individual Stewardship Plan as part of the Voluntary Stewardship Program?

① Yes
② No
③ Not applicable

Q16. How many acres, both owned and leased, did you farm in each of the three most recent years, 2017-2019?

	Number of owned acres ▼	Number of leased acres ▼	Total ▼
2017	______	______	______
2018	______	______	______
2019	______	______	______

If you leased any acres, continue with Q17. If you did NOT lease any acres, go to Q20.

Q17. What is the leased land used for? *Mark all that apply.*

☐ Housing
☐ Haying
☐ Livestock
☐ Vegetable production
☐ Grain/Cropland
☐ Aquaculture
☐ Forest-use land
☐ Other, please describe: ______________________________

Q18. Is your lease formal or informal?

① Formal (written contracts or written agreements)
② Informal (verbal contracts, general understanding, handshake)

Q19. How do you pay for the leased land? *Mark all that apply.*

☐ Lease fee
☐ Trade
☐ Payment per unit (e.g. per bale)
☐ No rent
☐ Other, please describe: ______________________________

Q20. Do you own your land outright? *Do not include leased land.*

① Yes
② No

Q21. What is your average cost per acre for the lease or purchase of your land in each of the three most recent years, 2017-2019? *Your best estimate will be fine.*

	Average cost per acre if *purchased outright* in the past three years	Average cost per acre for *mortgage* in the past three years	Average cost per acre for *lease* in the past three years
2017	$_______	$______	$_______
2018	$_______	$______	$_______
2019	$_______	$______	$_______

Q22. What were your total gross annual sales in 2019?

① Less than $1,000
② $1,000 to $2,499
③ $2,500 to $4,999
④ $5,000 to $9,999
⑤ $10,000 to $19,999
⑥ $20,000 to $24,999
⑦ $25,000 to $39,999
⑧ $40,000 to $49,999
⑨ $50,000 to $99,999
⑩ $100,000 to $249,999
⑪ $250,000 to $499,999
⑫ $500,000 or more

Q23. What was your net profit in 2019? *(sales less expenses)*

① Less than $1
② $1 to $1,000
③ $1,000 to $2,499
④ $2,500 to $4,999
⑤ $5,000 to $9,999
⑥ $10,000 to $19,999
⑦ $20,000 to $24,999
⑧ $25,000 to $39,999
⑨ $40,000 to $49,999
⑩ $50,000 to $99,999
⑪ $100,000 to $249,999
⑫ $250,000 to $499,999
⑬ $500,000 or more

Q24. How much did you pay in taxes in 2019?

① Less than $1
② $1 to $1,000
③ $1,000 to $2,499
④ $2,500 to $4,999
⑤ $5,000 to $9,999
⑥ $10,000 to $19,999
⑦ $20,000 to $24,999
⑧ $25,000 to $39,999
⑨ $40,000 to $49,999
⑩ $50,000 to $99,999
⑪ $100,000 to $249,999
⑫ $250,000 to $499,999
⑬ $500,000 or more

Q25. In 2019, what is the estimated value of food you provided for your family and others that was not exchanged for money (can include bartered products and services)? *Do not include donations.*

① $100 - $999
② $1000 - $1999
③ $2000 - $2999
④ $3000 - $3999
⑤ $4000 - $4999
⑥ $5000 - $5999
⑦ $6000 - $6999
⑧ $7000 - $7999
⑨ $8000 - $8999
⑩ $9000 - $9999
⑪ $10,000 or more

6

Q26. In 2019, what was the percentage of your total market value for each of these revenue sources? *Please indicate the percentage of market value for each of the revenue sources and the percentage of land used for that source. Enter 0 if you do not have that revenue source.*

Product	Percentage of market value ▼	Percentage of land farmed ▼
Vegetables, Herbs, Melons, Potatoes	______%	______%
Cattle and Calves	______%	______%
Hogs and Pigs	______%	______%
Poultry	______%	______%
Meat	______%	______%
Eggs	______%	______%
Agritourism	______%	______%
Fruits, Tree Nuts, Berries	______%	______%
Grain, Hay, Oilseeds, dry beans, dry peas	______%	______%
Nursery/Flowers	______%	______%
Dairy (Cow)	______%	______%
Dairy (Goat)	______%	______%
Dairy (Sheep)	______%	______%
Animal fiber	______%	______%
Lamb	______%	______%
Services (haying, fence-building, plowing, etc)	______%	______%
Other (please specify)	______%	______%
Does not apply (no commercial operations)	☐	☐
Total: (total should equal 100%)	**= 100%**	**= 100%**

Q27. Do you need assistance to maintain production or put your land under production?

① Yes → Continue with Q28
② No → Skip to Q29

Q28. Do you need support for any of the following actions?

	Yes ▼	No ▼
Farm succession	①	②
Support to lease your land	①	②
Put a conservation Easement on your land	①	②

Q29. Are you interested in collecting data on your farm or collaborating with fellow farmers on any of the following?

	Yes ▼	No ▼
Sharing equipment	①	②
Sharing land	①	②
Providing mentorship	①	②
Sharing farmworker housing	①	②
Collaborative internship programs	①	②
Being part of an agricultural producers cooperative	①	②
Participating in voluntary gathering of observational data related to water quality, soil health, and biodiversity	①	②

7

Q30. What is your owner equity, or debt to asset ratio?

Farm Debt to Asset Ratio Calculator

Assets (value of land, machinery, livestock, other assets, outstanding income)	$______________
Debts (bank or other loans for land or machinery, outstanding debts and outstanding taxes)	$______________
Owner Equity: Debt/Assets	$______________

Q31. Is this farm or ranch primarily or fully…

	Yes	No
Female-owned	①	②
Minority-owned	①	②
Owned by a veteran	①	②

Q32. How long have you been the primary operator of your farm?

_______ Years

Q33. In what year were you born?

_______ Year (YYYY)

Q34. How many more years do you plan to continue farming?

_______ Years

Q35. What are your plans for your farm when you are done farming? *Please explain.*

That completes our survey. If you have any other comments you would like to make, please note them here.

Thank you for your participation in this survey!

Please send your completed survey in the enclosed postage-paid business reply envelope.

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8

SESRC Staff

All of the work conducted at the Social & Economic Sciences Research Center is the result of a cooperative effort made by a team of dedicated research professionals. The research in this report could not have been conducted without the efforts of interviewers and part-time personnel not listed.

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