

Ontario Beekeepers' Association Strategic Plan Update

Open Survey Results

Table of Contents

List of Figures	2
List of Tables	2
About This Report	3
Methods	3
1.0 Key Findings	4
2.0 Summary Data.....	5
3.0 Beekeeper Summary Data	8
3.1 Commercial Beekeepers	9
3.2 Hobbyist Beekeepers	10
4.0 Member Summary Data.....	10
5.0 Non-Member Summary Data.....	14
5.1 Former Member Summary Data	14
5.2 Other Non-Members Summary Data.....	16
6.0 Opportunities and Challenges for Ontario’s Beekeeping Sector	18
6.1 Opportunities	18
Increased Honey Production/ Sales	19
Growing/Expanding – New Market Stream	19
Education and Educating Others	19
Queen Rearing and Breeding	20
Other Common Themes	20
6.2 Challenges	21
Bee and Hive Health – Pest, Predators, Diseases, and Weather	22
Business Management – Access to Finances/Cost of Production, Market Forces, and Government Support	22
Other Common Themes	22
7.0 Support, Communication, and Outreach Summary Data	23
Appendices.....	24
Appendix A: Regional Breakdown.....	24
Appendix B: Respondents’ answers to the level of importance for various OBA activities	26
Appendix C: Respondents’ answers to their level of agreement on various topics related to OBA communication and outreach.....	27

List of Figures

Figure 1. Level of familiarity with the OBA and its work. (n=567).....	5
Figure 2. Location of respondents by region. (n=555)	5
Figure 3. Age of respondents. (n=565)	6
Figure 4. Respondents answer to: The Ontario Beekeepers' Association celebrates the diversity of beekeepers. Do you identify as a visible minority? (n=564).....	6
Figure 5. Gender of respondents. (n=566)	6
Figure 6. Respondents' relationship with the Ontario Beekeepers' Association. (n=565)	7
Figure 7. Respondents' role in beekeeping industry. (n= 567)	7
Figure 8. Number of years in beekeeping. (n=457)	8
Figure 9. Beekeeper respondents and their income generated from beekeeping, as a portion of their overall income. (n=480).....	9
Figure 10. Number of hives identified by beekeeping respondents. (n=456).....	9
Figure 11. Stages of beekeepers' careers. (n=479)	9
Figure 12. Members' level of agreement with various statements about the OBA membership benefits. (n=380) ..	11
Figure 13. Members' level of agreement with various statements about the OBA membership benefits. (n=380) ..	12
Figure 14. Former members' level of agreement with various statements about the OBA membership benefits. (n=45)	14
Figure 15. Former members' level of agreement with various statements about the OBA membership benefits. (n=45)	15
Figure 16. Non-members' level of agreement with various statements. (n=98)	16
Figure 17. Non-members' level of agreement with various statements. (n=98)	17
Figure 18. Results from beekeepers answering, " What do you see as 2-3 opportunities for Ontario's beekeeping sector over the next 5 years?" categorized by themes. (n=377).....	18
Figure 19. Results from former and non-members answering, " What do you see as 2-3 opportunities for Ontario's beekeeping sector over the next 5 years?" categorized by themes. (n=93)	18
Figure 20. Results of beekeepers answering, "What do you see as the top 2-3 challenges you currently face as a beekeeper?" categorized by main themes. (n=417)	21
Figure 21. Results of former and non-members answering, "What do you see as the top 2-3 challenges currently facing Ontario's beekeeping sector?" categorized by main themes (note: these answers may also include beekeepers). (n=99).....	21
Figure 22. Respondents' answers to the level of important of various activities regarding the OBA supporting Ontario beekeepers. (n=506).....	26
Figure 23. Respondents' answers to the level of importance of various activities regarding the OBA supporting Ontario beekeepers. (n=506).....	26
Figure 24. Respondents' answers to the level of agreement of various statements regarding the OBA's communications and outreach. (n=505)	27
Figure 25. Respondents' answers to the level of agreement of various statements regarding the OBA's communications and outreach. (n=505)	27

List of Tables

Table 1. A break down of the number of hives on respondent's beekeeping operation.....	8
Table 2. Membership categories of survey respondents who are current OBA members. (n=377).....	11
Table 3. Former membership category of respondents who are no longer OBA members. (n=45).....	14

About This Report

This report presents the descriptive findings from the open survey. The survey results are not intended to provide a fulsome overview of the OBA's membership or Ontario's beekeeping sector. Rather, the purpose of this report is to inform the direction of the 2023-2028 Strategic Plan.

This document is for internal (OBA) use only; it is not for distribution.

Methods

A public survey was conducted and open to current, former, and non-Ontario Beekeeper Association members. The survey was available between September 5, 2022, and October 2, 2022. The survey was promoted through:

- OBA's social media
- The September issue of the Ontario Bee Journal
- Direct correspondence between the OBA and stakeholders
- Ontario Federation of Agriculture's weekly NewsWire (38,000+ members)

After the survey was closed, a preliminary search through the data showed that survey bots (a software application program that answers surveys multiple times for one recipient) was used. The following are the methods used to identify and eliminate the survey bot responses:

- a) Identifying people that did not complete the survey (only inputted name and email)
- b) Identify recipients that used the same open-comment responses (see if these responses were submitted at the same time)
- c) Doing a preliminary Google search on anyone that identified as a government employee or a researcher to validate their identity

After the survey results were cleaned, there were 567 legitimate respondents.

1.0 Key Findings

Six key themes emerged through the open survey. The following themes are a combination of results from beekeepers and non-beekeepers, as well as current members, former members and previous members.

OBA members see value in their membership and plan to continue to support the OBA

- 97% of those surveyed plan to renew their membership for the foreseeable future
- 72% of members agree or strongly agree that the OBA is a strong voice for Ontario beekeepers
- 57% of OBA members agreed that the group liability insurance is valuable to them, and 29% of non-members would see value in this benefit

The Tech Transfer Program is highly valued by members and non-members

- 81% of OBA members, 70% of former members, and 71% of non-members agreed or strongly agreed that the ORHBS Program is valuable
- 82% of OBA members, 74% of former members, and 71% of non-members agreed or strongly agreed that the TTP conducts research that is useful to Ontario beekeepers

Beekeepers feel their biggest opportunities in the future is their ability to increase their honey production and expand into new markets

- Beekeepers would like to expand their operations to become "self-sustaining" - Queen rearing and production of nucs were two key strategies addressed as opportunities
- 18% of beekeepers mentioned opportunities to expand into new markets including pollination services, agritourism, specialty honeys, beeswax products, mead, and natural care products
- Beekeepers see opportunities to tap into local market demand (for consumer products and beekeeper products, such as the sale of queens)

There is an opportunity to explore a mentorship program for OBA members

- Members noted they like being a member because they get to connect with other beekeepers
- When sharing opportunities for the sector, some respondents specifically mentioned mentorship or networking between established and new beekeepers would be valuable
- Many respondents would like to see younger generations get into beekeeping
- Most of the respondents that expressed a desire for a mentorship program were female

One of the biggest challenge/concern identified for the Ontario beekeeping sector is bee and hive health

- 59% of beekeepers and 67% of former/non-members feel that bee and hive health is a huge challenge facing the Ontario beekeeping sector
- Respondents are concerned with hive health as it relates to climate change, pollinator habitat loss, maintaining healthy queens, mite control, small hive beetle, overwintering, and pesticide contamination

The OBA's most important activities according to survey respondents are:

- ✓Advocating for the needs of Ontario's beekeepers with governments
- ✓The technology transfer program
- ✓Ontario bee breeders' association activities

2.0 Summary Data

In total, 567 people completed this survey.

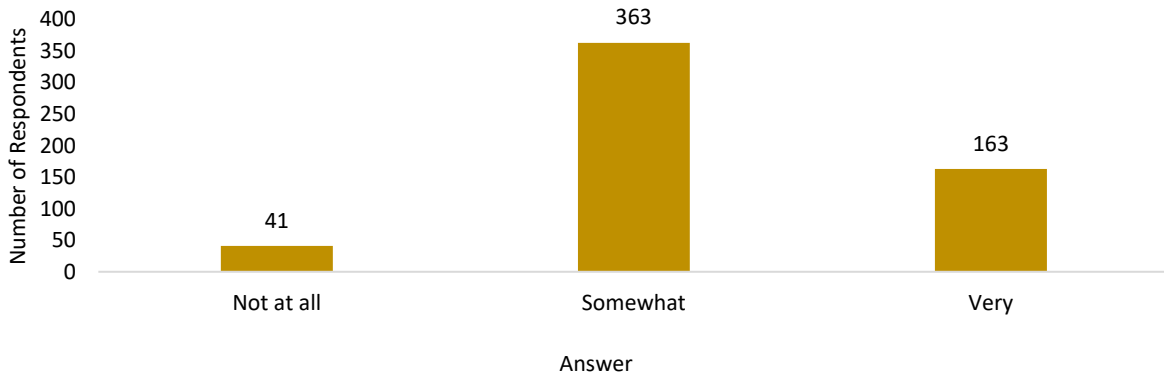


Figure 1. Level of familiarity with the OBA and its work. (n=567)

Of the 41 respondents that said they were not familiar with the OBA (see Figure 1):

- 19 of them were hobbyist
- 16 of them were non-members
- 10 of them are OBA members with 7 of these members being young or new beekeepers

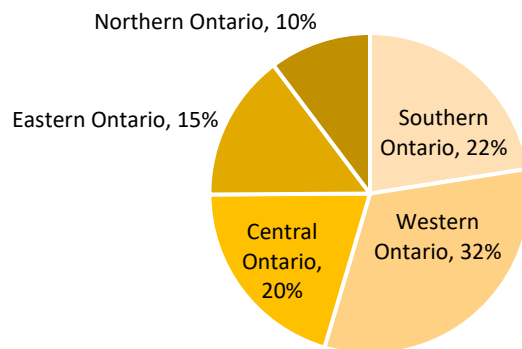


Figure 2. Location of respondents by region. (n=555)

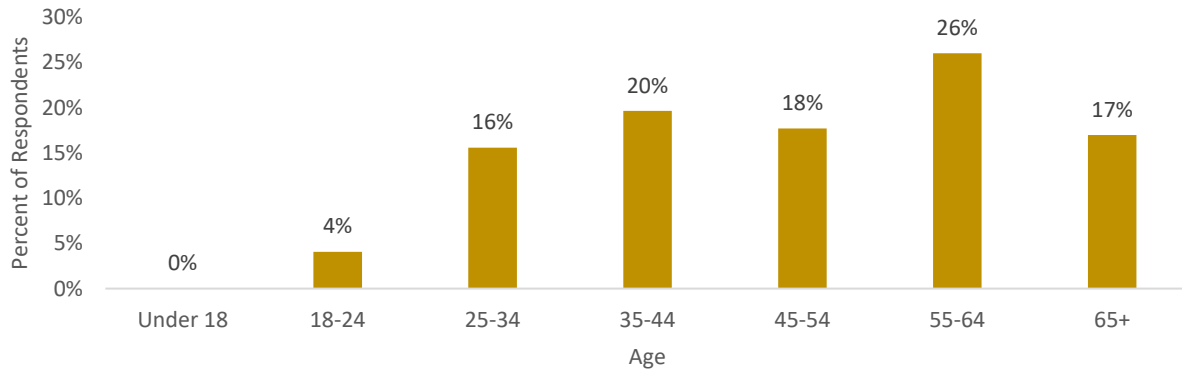


Figure 3. Age of respondents. (n=565)

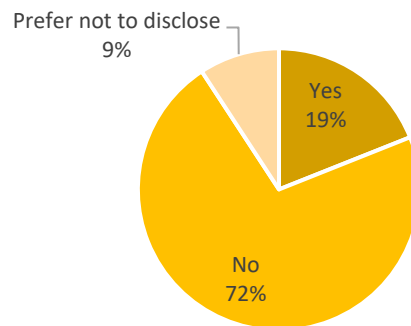


Figure 4. Respondents answer to: The Ontario Beekeepers' Association celebrates the diversity of beekeepers. Do you identify as a visible minority? (n=564)

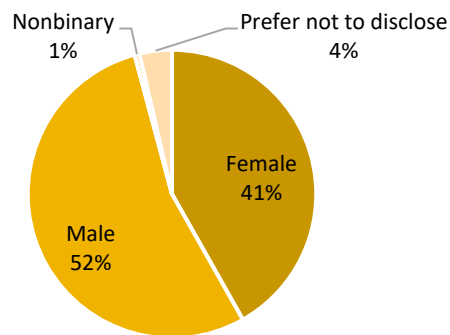


Figure 5. Gender of respondents. (n=566)

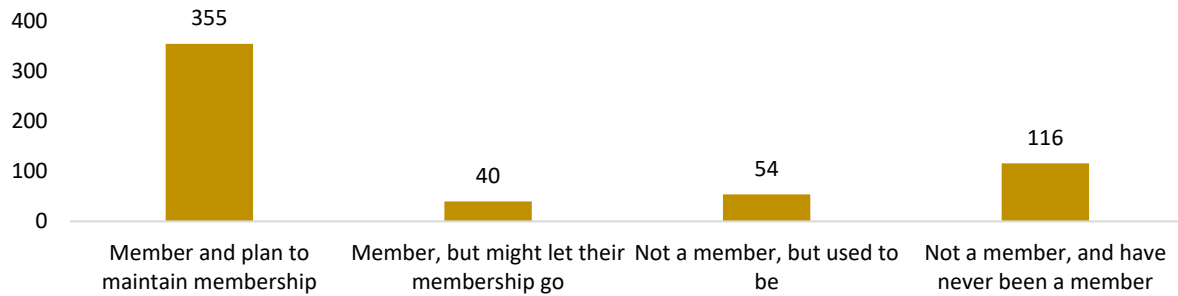


Figure 6. Respondents' relationship with the Ontario Beekeepers' Association. (n=565)

481 respondents were beekeepers. In 2022, Ontario reported 3,735 beekeepers.¹ This survey captured the insights from approximately 13% of Ontario's registered beekeepers.

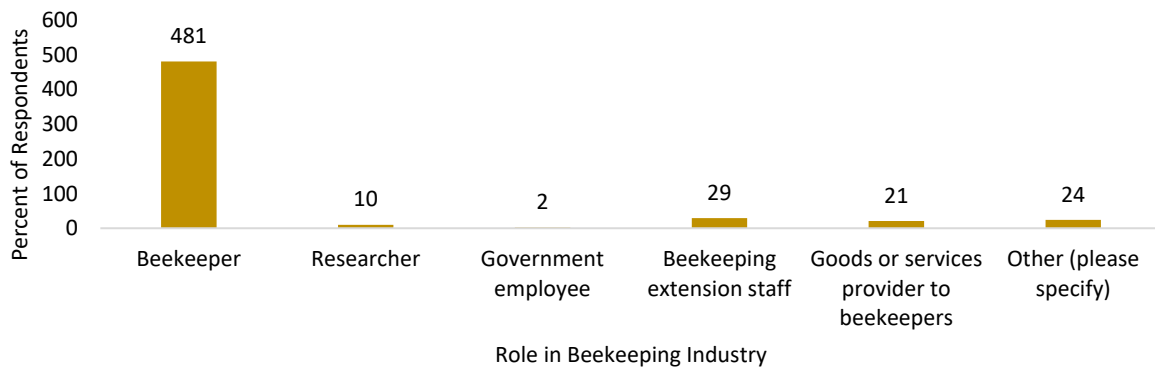


Figure 7. Respondents' role in beekeeping industry. (n= 567)

¹ Ontario Ministry of Agriculture, Food and Rural Affairs (personal correspondence), 2022.

3.0 Beekeeper Summary Data

In total, 481 beekeepers completed the survey (see Figure 7). Half of beekeepers surveyed have been beekeeping for 5 years or less (see Figure 8). Of those that have been beekeeping for 5 years or less, 92% of them have under 50 hives. From these new beekeepers, 60% identify as a hobbyist and 31% identify as a growing or developing business.

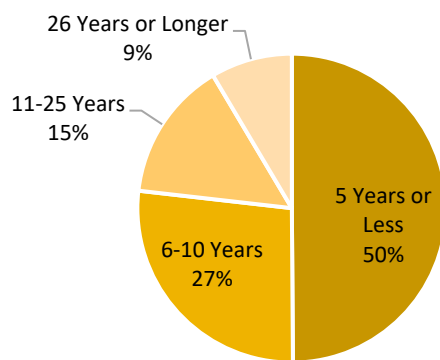


Figure 8. Number of years in beekeeping. (n=457)

The total number of hives represented by survey respondents was 28,519 (see Figure 10). In 2022, Ontario reported 102,900 registered hives in total.² This survey captured the insights of beekeepers representing approximately 28% of all registered hives in Ontario.³ 101 commercial beekeepers (respondents with 50 hives or more) took part in the survey (see Table 1). The commercial beekeepers that participated in this survey represent 24,864 of the registered hives in Ontario. This survey captured the insights from approximately 45% of commercial beekeepers and 31% of the total number of commercial registered hives.⁴

Table 1. A break down of the number of hives on respondent's beekeeping operation.

Number of Hives on Respondent's Beekeeping Operation	Number of Respondents	Total Number of Hives Represented
Less than 50 hives	355	3,655
More than 50 hives	101	24,864

39% of the respondents identified beekeeping as not a source of their overall income⁵ (see Figure 9), and 46% of respondents identified themselves as hobbyist (see Figure 11). 78% of respondents have less than 50 hives (see Figure 10).

² Note: Data is presented as the number of colonies in Ontario.

³ This is a low estimate as 27 beekeepers skipped this question. Therefore, the total proportion of Ontario's hives represented by survey respondents may be higher than estimated.

⁴ Ontario Ministry of Agriculture, Food and Rural Affairs (personal correspondence), 2022.

⁵ From the beekeepers that selected other (n=17), a few answers were "just beginning", "not yet cash positive", and "retirement project".

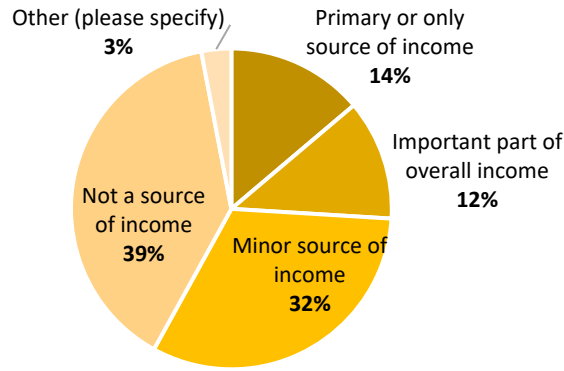


Figure 9. Beekeeper respondents and their income generated from beekeeping, as a portion of their overall income. (n=480)

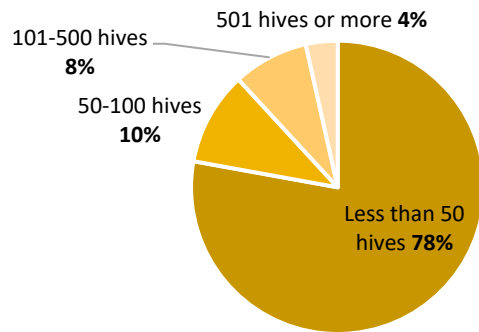


Figure 10. Number of hives identified by beekeeping respondents. (n=456)

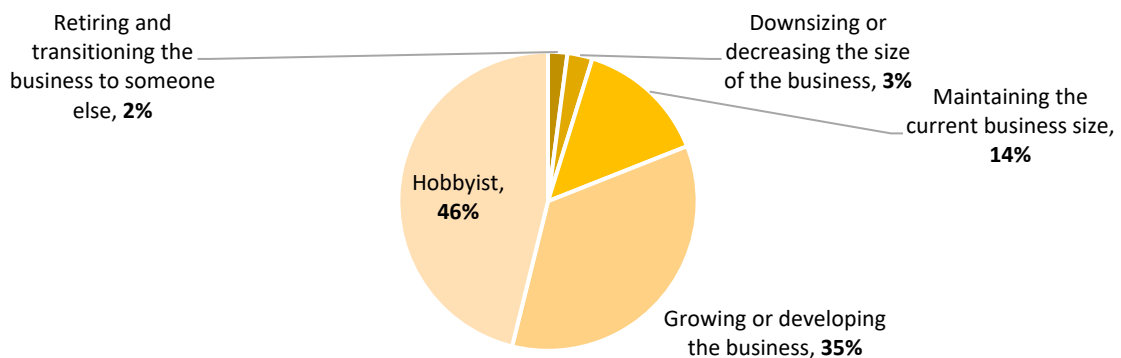


Figure 11. Stages of beekeepers' careers. (n=479)

3.1 Commercial Beekeepers

- The average number of years in beekeeping is 16

- The average number of hives is 252
- 75% of commercial beekeepers indicated beekeeping is their primary source of income or an important source of income
- 59% of commercial beekeepers say they are in the stage of growing or developing their business, 29% are maintaining their current business size
- 23% of commercial beekeepers surveyed identified nuc and/or queen production as an opportunity for their operation over the next 5 years
- Commercial beekeepers were more likely to indicate that the group liability insurance is valuable to them⁶
- Just 3 commercial beekeepers indicated they would not be renewing their membership fees – reasons include the cost of membership and the perception that the OBA caters more to hobbyists. 96% of commercial beekeepers surveyed plan to renew their membership for the foreseeable future

3.2 Hobbyist Beekeepers

- The average number of years in beekeeping is 7
- The average number of hives is 10
- 88% of hobbyist beekeepers indicated beekeeping is not a source of income or is a minor source of income
- 62% of beekeepers that have less than 50 hives, identify themselves as hobbyist. 25% indicated that they are growing or developing the business and 10% are maintaining the current size of their business
- 17% of the hobbyist beekeepers survey identified increasing honey sales or expanding their honey products as an opportunity for their operation over the next 5 years. Examples of honey products mentioned are:
 - Flavoured honey, lavender honey, more variety in honey products, infused honey, soap, wax, blended honey, medical honey, and honey candy
- More likely to strongly agree that the OBA Tech Transfer Programs conducts research that is useful to Ontario beekeepers⁷ and the TTP's support of the Ontario Resistant Honey Bee Selection Program is a valuable way to continue to maintain and improve the quality of locally produced honey bee queens⁸

4.0 Member Summary Data

Of the 395 respondents who are current members of the OBA (see Figure 6), the majority belong to small-scale beekeeper or large-scale commercial beekeeper membership categories (see Table 2).

⁶ 72.5% of commercial beekeepers agreed or strongly agreed the group liability insurance is important to them, compared to 57% of all beekeepers surveyed.

⁷ 49% of hobbyist beekeepers strongly agreed with this statement, compared to the 41% of all beekeepers surveyed

⁸ 44% of hobbyist beekeepers strongly agreed with this statement, compared to the 38% of all beekeepers

Table 2. Membership categories of survey respondents who are current OBA members. (n=377)

OBA Membership Category	Number of survey respondents
Young Beekeeper (Younger than 25 years of age)	23
New Beekeeper (Beekeeper for less than one year)	30
Small-scale Beekeeper (less than 50 colonies)	216
Larger or Commercial Beekeeper (50 or more colonies)	96
Industry/supplier/supporter	3
Local Beekeeping Association	9

Of the 107 respondents that identified as a visible minority, 86 of these respondents are currently OBA members. Of the 229 respondents that identified as a female, 152 of those respondents are currently OBA members.

72% of OBA members agreed that the OBA is a strong voice for Ontario Beekeepers (see Figure 12). 57% of OBA members agreed that the group liability insurance is valuable to them.

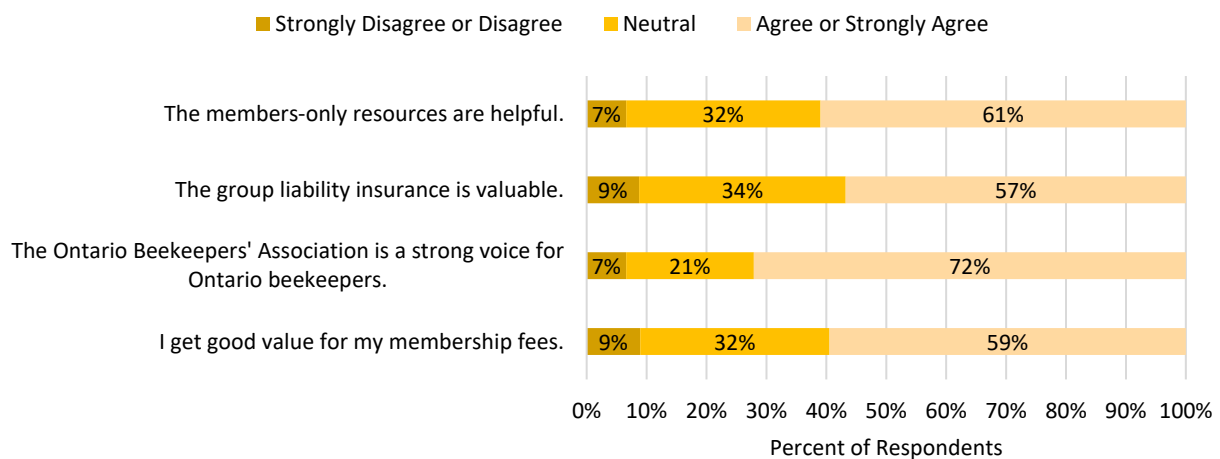


Figure 12. Members' level of agreement with various statements about the OBA membership benefits. (n=380)

81% of OBA members felt positive about the OBA’s Tech Transfer Program’s in relation to supporting honeybee queens in Ontario (see Figure 13). Additionally, 82% of current members felt positive about the OBA’s Tech Transfer Program conducting useful information for Ontario beekeepers (see Figure 13).

“The OBA is an important advocate for beekeepers at the policy level and I have confidence that their evidence-based approach to research and knowledge sharing legitimizes the Ontario beekeeping community.”

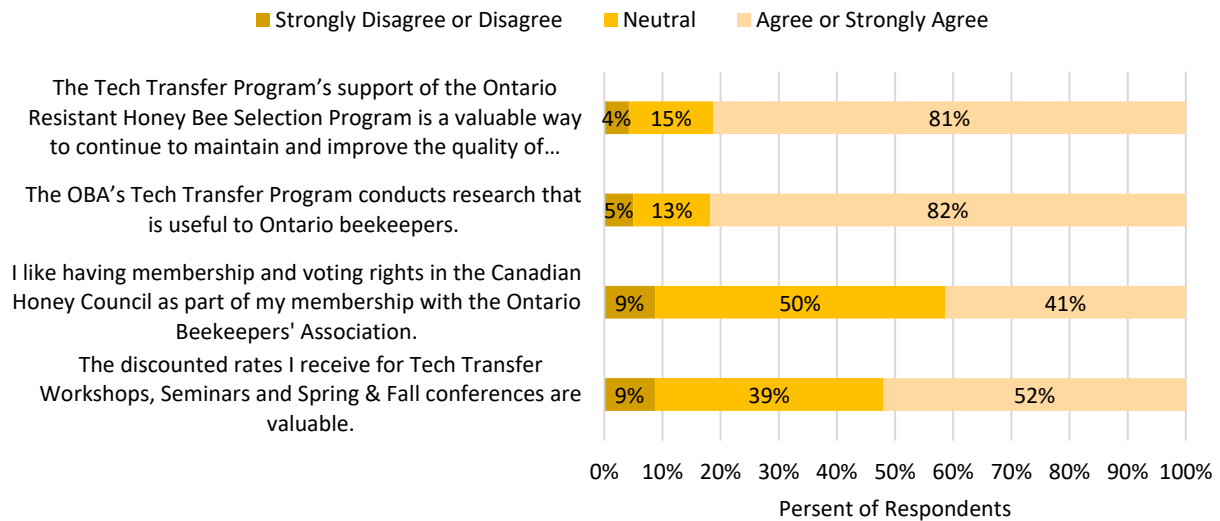


Figure 13. Members' level of agreement with various statements about the OBA membership benefits. (n=380)

84% of respondents were likely or strongly likely to recommend becoming an OBA member to new beekeepers. Many respondents shared that they actively recommend OBA membership to other beekeepers while expressing their appreciation of the OBA as a provincial voice for Ontario beekeepers.

When asked whether they planned to renew their membership for the foreseeable future, 97% (365) respondents said yes, 3% (12) said no. Of those who said they plan to renew their membership, they provided a number of reasons why, including:

- ✓ Being a good source of relevant information about bee health and beekeeping practices more generally – specifically, the OBA does a good job of being a reliable, single point of expertise
- ✓ Providing a structure for a community/network of beekeepers
- ✓ Providing a strong & unifying voice for Ontario beekeepers
- ✓ They value the liability insurance
- ✓ They enjoy reading the Ontario Bee Journal

“My membership provides access to Ontario-specific information which I am not likely to get elsewhere.”

Some respondents shared that they are new members to the OBA, and they are not sure of all there is to offer just yet, highlighting an opportunity for the OBA to expand its communications about membership benefits to new and potential members.

“Glad to support an organization who is looking out for the best interests of the beekeeping industry. Their affiliation with other groups like the Canadian Honey Council are important”

Of those who stated they do not plan to renew their membership, the most common reason shared was that they either “don’t use it much” or felt as though the cost was “too high” for someone with “2-3 hives”, for example. Some hobbyists shared that the benefits of membership “seem to cater to bigger operations”. Of those who do not plan to renew their membership:

- 58% were just “somewhat” familiar with the OBA and its work
- 41% are beekeepers, all with 55 hives or less

Two respondents shared that the “voting system favors hobbyists” and felt as though commercial beekeepers do not get good value for their membership. Some respondents suggested that commercial members should have “a bigger vote” than hobbyists.

These findings underscore the OBA’s unique role in representing a diverse membership, from individuals with 1 or 2 hives, to commercial-scale producers with hundreds of hives.

“During the season it can be challenging to find time, I value that OBA can represent me when I cannot represent myself.”

5.0 Non-Member Summary Data

5.1 Former Member Summary Data

Of the 54 respondents who were former members of the OBA (see Figure 6), 45 shared the membership category they belonged to. Majority belong to the small-scale beekeeper category (see Table 3).

Table 3. Former membership category of respondents who are no longer OBA members. (n=45)

Former OBA Membership Category	Number of survey respondents
Young Beekeeper (Younger than 25 years of age)	2
New Beekeeper (Beekeeper for less than one year)	3
Small-scale Beekeeper (less than 50 colonies)	26
Larger or Commercial Beekeeper (50 or more colonies)	7
Industry/supplier/supporter	1
Local Beekeeping Association	6

62% of former members agreed or strongly agreed with the statement that the OBA is a strong voice for Ontario beekeepers (see Figure 14). Although only 36% of the former members felt positive about the statement that they received good value for their membership fees (see Figure 14). 53% of former members felt neutral about the statement on if the group liability insurance was valuable to them (see Figure 14).

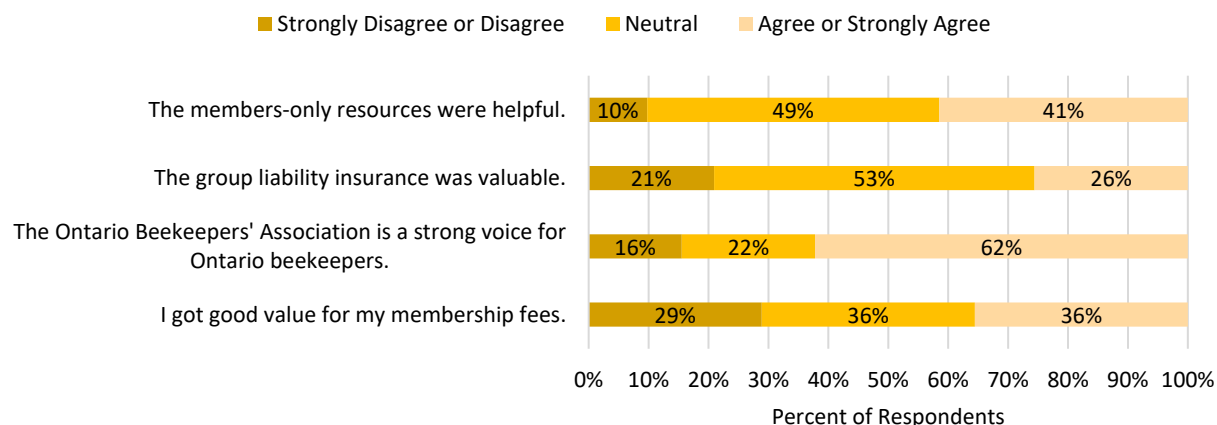


Figure 14. Former members' level of agreement with various statements about the OBA membership benefits. (n=45)

70% of former members felt positive about the OBA's Tech Transfer Program's in relation to supporting honeybee queens in Ontario (see Figure 15). Additionally, 74% of former members felt positive about the OBA's Tech Transfer Program conducting useful research for Ontario beekeepers (see Figure 15).

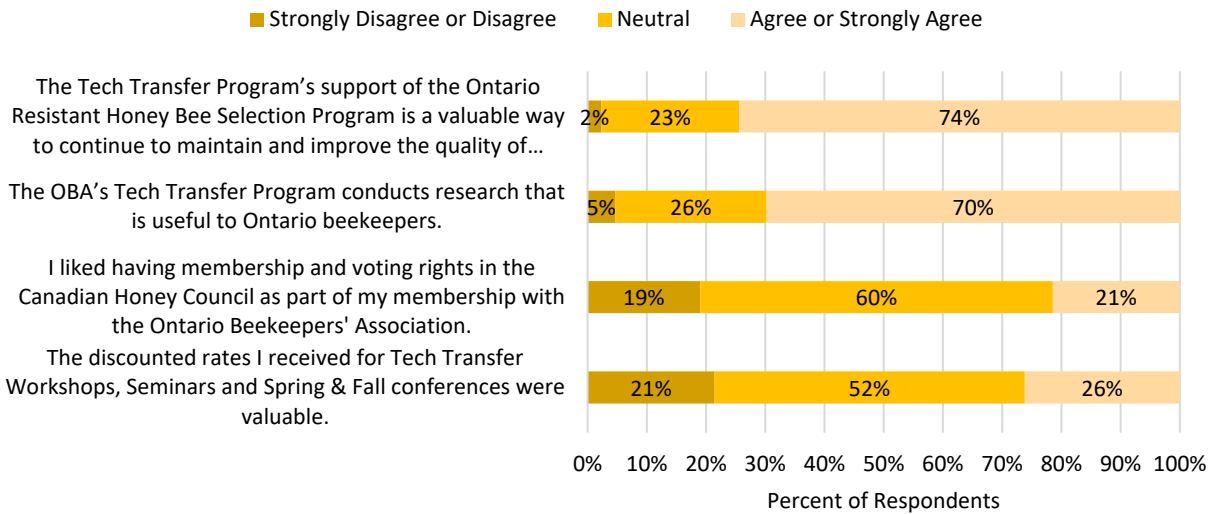


Figure 15. Former members' level of agreement with various statements about the OBA membership benefits. (n=45)

61% of the respondents that were former members felt that the OBA was too expensive or did not advocate for their interests. Of the former members who felt their membership was too expensive:

- Two were commercial beekeepers (50 hives or more)
- The majority (92%) were beekeepers who's operations are a minor or negligible source of their overall income⁹

38% of respondents provided other reasons for leaving. For example, 7 were due to COVID-19, issues with reapplying online, or not being notified of membership ending. The following are some of the other reasons why former members canceled their OBA membership.

- Winter losses drove two respondents to cut out "extra" cost so they could focus on rebuilding their operation
- One respondent disagreed with the OBA's approach to engaging with the Pest Management Regulatory Agency
- One respondent noted that they were unable to access Technology Transfer programs in Northern Ontario

⁹ No former members who indicated their membership was too expensive stated that beekeeping was a primary source of their income. One former member stated beekeeping was an important part of their overall income.

When asked what the OBA could offer or change for former members to join the association again, the following are a few key themes from their responses: (n=31)

- Introducing a lower fee for beekeepers that fit in the hobbyist category or reducing fees altogether.
- Increasing the training/educational seminars and ensuring they are hitting more locations across Ontario.
- Making improvements to their membership sign-up strategy. This could include paper mail, a personal call, or email.
- Researching and providing more answers for some of the challenges beekeepers face (see section 6.2 Challenges)
- One respondent added they plan to renew their membership next year.

“Membership fees need to be drastically reduced for hobbyists. OBA has valuable resources and education that will benefit the entire beekeeping community if hobbyists are engaged.”

5.2 Other Non-Members Summary Data

59% of non-members felt neutral about the idea of group liability insurance (see Figure 16).

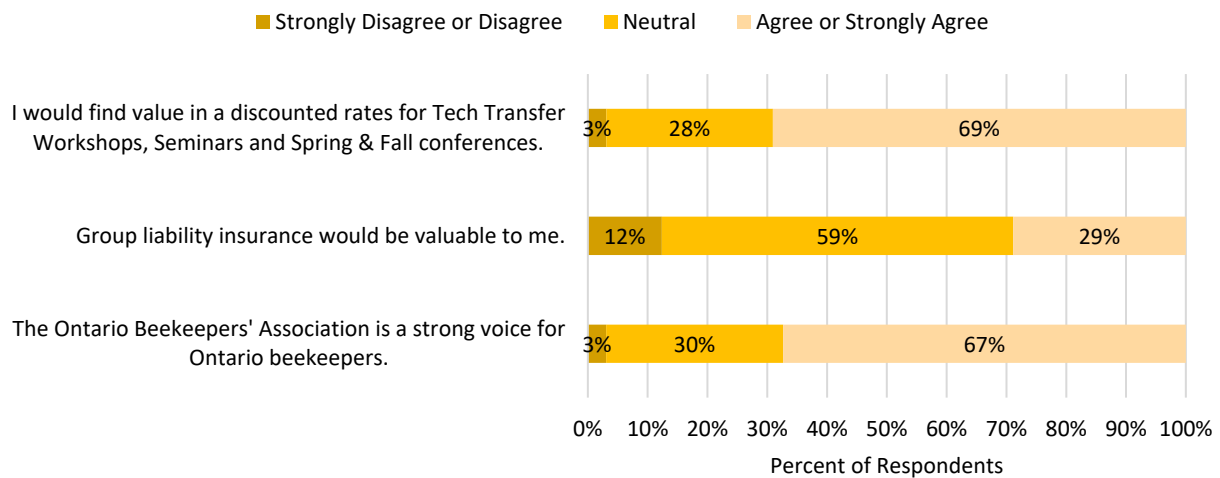


Figure 16. Non-members' level of agreement with various statements. (n=98)

71% of non-members felt positive about the OBA’s Tech Transfer Program’s in relation to supporting honeybee queens in Ontario and conducting useful research for Ontario beekeepers (see Figure 17).

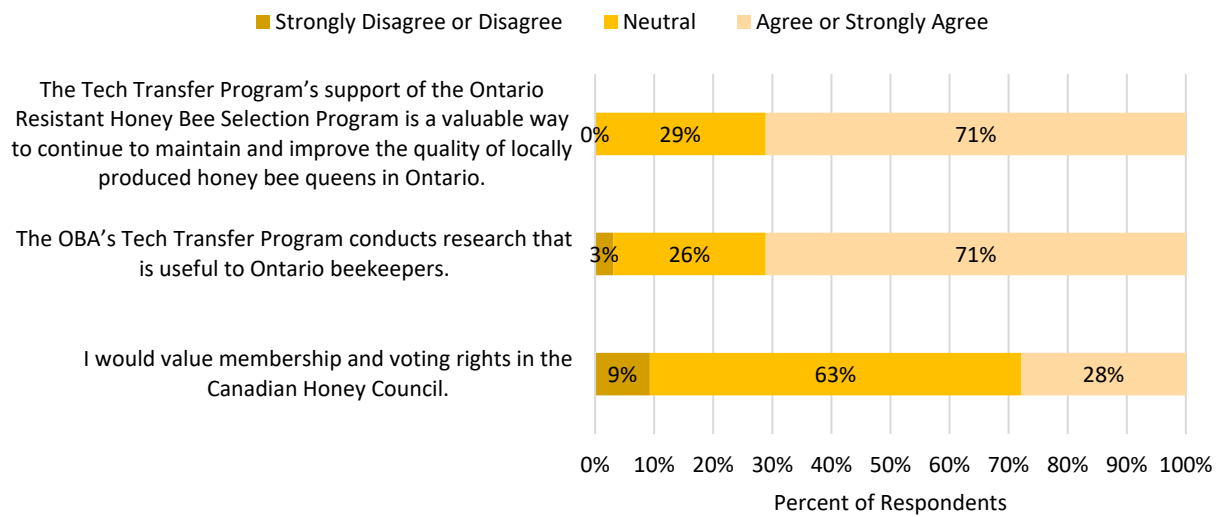


Figure 17. Non-members' level of agreement with various statements. (n=98)



6.0 Opportunities and Challenges for Ontario's Beekeeping Sector

6.1 Opportunities

Five key opportunities for Ontario's beekeeping sector emerged. The opportunities brought forward by beekeepers (see Figure 18) and non-beekeepers (see Figure 19) were similar. Below, an overview of each theme of opportunities is provided.

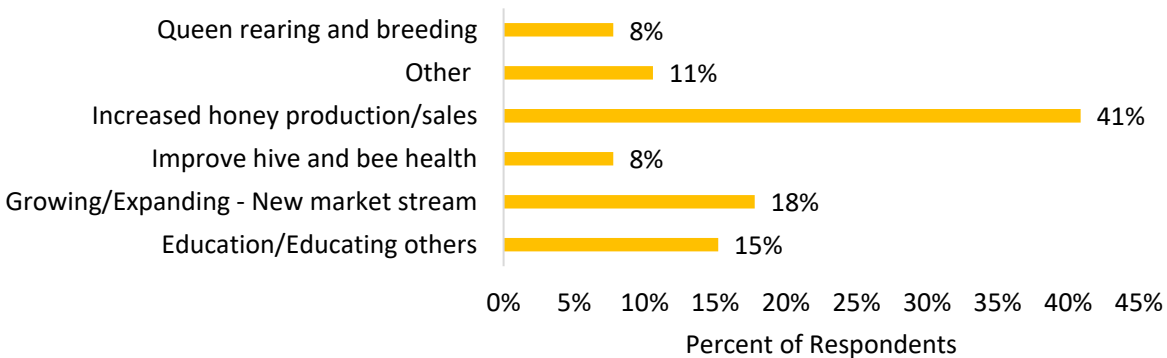


Figure 18. Results from beekeepers answering, "What do you see as 2-3 opportunities for Ontario's beekeeping sector over the next 5 years?" categorized by themes. (n=377)

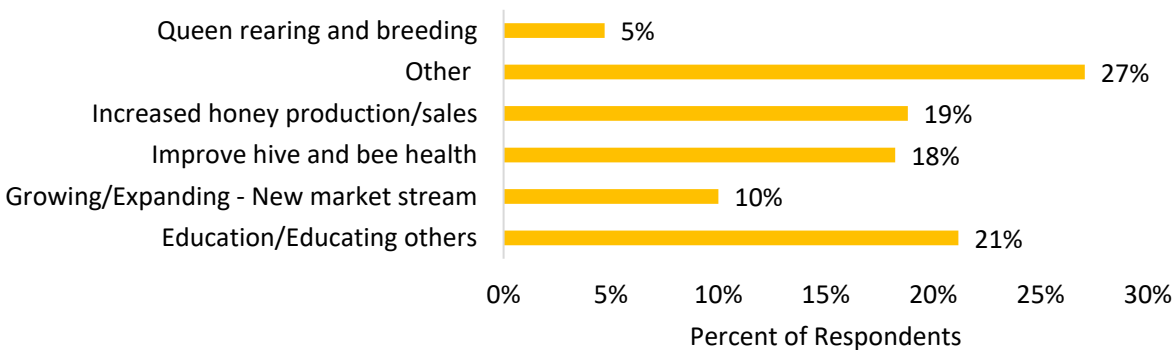


Figure 19. Results from former and non-members answering, "What do you see as 2-3 opportunities for Ontario's beekeeping sector over the next 5 years?" categorized by themes. (n=93)

Below, each of the themes for opportunities are described in more detail.

Increased Honey Production/ Sales

The most common opportunity shared by respondents was to increase honey production and/or expand the number of hives they care for. Many spoke to the desire to expand so their operation can become “self sustaining” and so they could make more of an income from beekeeping. This finding may speak to the desire for respondents to transition from beekeeping as a hobby to a career or more viable means of income.

Growing/Expanding – New Market Stream

The second most common opportunity shared by survey respondents involved expanding into new market opportunities, including (in order of prevalence):

- Production and sale of nucs to other Ontario beekeepers
- Pollination services for agriculture crops
- Agritourism
- Specialty honeys or new honey blends
- Production and sale of quality queens
- Beeswax products
- Mead
- Natural personal care products (for example propolis)

When sharing opportunities for expanding into new market streams, many respondents shared that learning how to market these products would be valuable. Respondents also frequently noted the market for local products being a strong opportunity. Supports for beekeepers to strengthen their marketing skills could focus on leveraging the demand for local Ontario-made products.

Education and Educating Others

Respondents spoke of education in two main contexts. First, they indicated there are opportunities to further educate the public about:

- ✓ The importance of bees as pollinators
- ✓ The quality of local Ontario-made honey and bee products
- ✓ Where to find local Ontario honey and bee products

Second, respondents see opportunities to develop networking and mentorship activities between beekeepers. Many respondents shared that “helping other beekeepers” was an opportunity for their business and the sector more broadly. Key opportunities included comments to help other beekeepers “get started”, take over an existing business in transition and share ways to tackle challenges like mites and beekeeping in a changing climate.

Responses also included opportunities to educate and encouraging younger generations to consider the beekeeping sector. For example, two respondents noted an interest in programs geared specifically towards youth or younger beekeepers, potentially involving mentorship or networking between established beekeepers and would-be beekeepers.

Other things beekeepers wish to learn more about:

- ✓ Hive splitting techniques (e.g., when to split and how)
- ✓ Swarm capturing techniques
- ✓ Best practices for queen rearing
- ✓ How to sell nucs to other beekeepers
- ✓ Organic options for treatment of pests and diseases (e.g., mites)
- ✓ Processing options for smaller beekeepers

Queen Rearing and Breeding

In total, 63 respondents noted queen rearing is an opportunity for their beekeeping business. Respondents' answers ranged from wanting to learn more about how to breed their own queens for their operation, improve queen rearing practices, and develop an opportunity to sell queens from their operation. Two respondents noted being able to rear their own queens is a matter of becoming self-sustainable as beekeepers.

Improving genetic diversity of their hives was seen as a growing opportunity for respondents. Many spoke to their efforts in becoming less reliant on purchasing nucs for their operation.

Other Common Themes

Some other themes found by non-members were increased communication between experienced and new beekeepers, working on updating bee friendly bylaws, utilizing technology to connect people in the beekeeping community, improving the standard of social and environmental accountability in industrial engagement, and increasing youth engagement.



6.2 Challenges

Ten key challenges for Ontario’s beekeeping sector emerged. Beekeepers were asked about the challenges they face (Figure 20). Survey respondents who are not members, or are former members, were asked about the challenges facing the beekeeping sector more broadly (Figure 21). Below, an overview of each theme of challenges is provided.

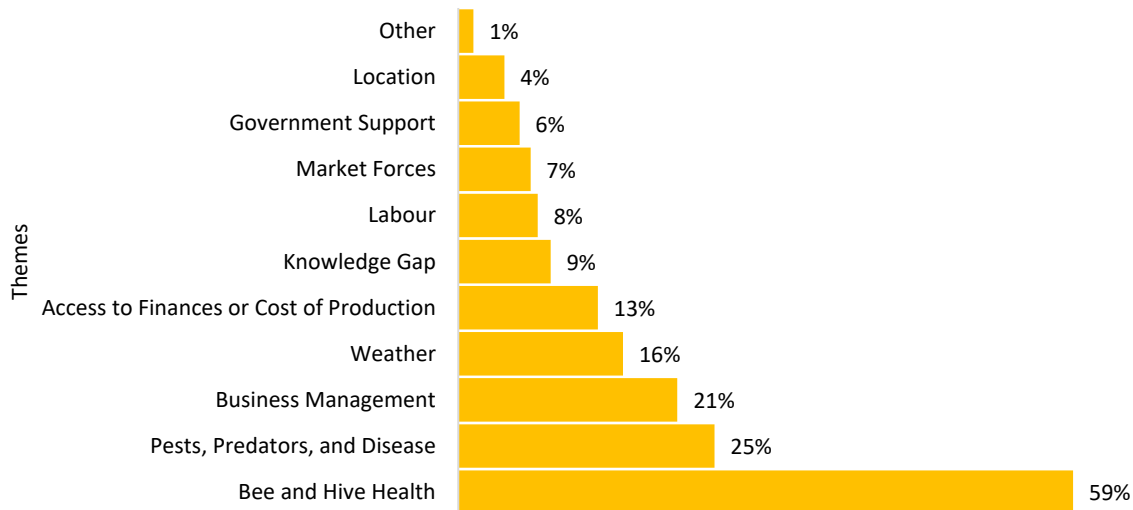


Figure 20. Results of beekeepers answering, "What do you see as the top 2-3 challenges you currently face as a beekeeper?" categorized by main themes. (n=417)

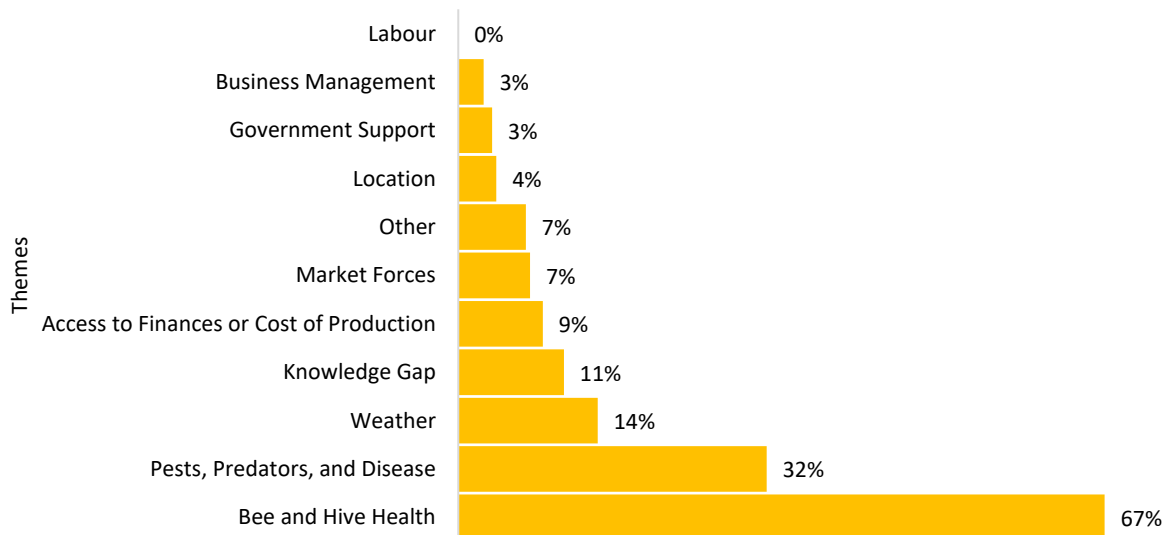


Figure 21. Results of former and non-members answering, "What do you see as the top 2-3 challenges currently facing Ontario’s beekeeping sector?" categorized by main themes (note: these answers may also include beekeepers). (n=99)

Below, each of the themes for challenges are described in more detail.

Bee and Hive Health – Pest, Predators, Diseases, and Weather

Concern over bee and hive health was the most common challenge most beekeepers (59%) and former/non-members (67%) identified. Within this theme, pest, predators, and diseases, and weather were top concerns for both groups. The following are a few common responses seen across these themes:

- ✓ Climate change
- ✓ Habitat loss
- ✓ Maintaining a healthy queen
- ✓ Mite control (Varroa mite)
- ✓ Small hive beetle
- ✓ Overwintering
- ✓ Pesticides
- ✓ Preventing swarming

Business Management – Access to Finances/Cost of Production, Market Forces, and Government Support

Concern over business management was another top theme identified by beekeepers (21%), although it was not as high on the former/non-members list (3%). Along with this theme, access to finances or cost of production, market forces, and government support, commonly came up. Some common responses seen across these four themes are:

- ✓ Inability to acquire equipment (cost and access)
- ✓ The impact of COVID-19
- ✓ Inflation
- ✓ Time management
- ✓ Unstable honey yields
- ✓ Finding funding
- ✓ Marketing/finding a market for their product

Other Common Themes

Some other common themes found in both beekeepers and former/non-members were knowledge gap and location. Some common responses for knowledge gap were access to information, educational opportunities, receiving mentoring, and ensuring all beekeepers have the knowledge to protect ALL bees. Common location responses were finding storage, urban beekeeping restrictions, driving long distance for supplies, and lack of foraging area.

8% of respondents also identified labour as a challenge. Approximately half of respondents who identified finding labour as a challenge were commercial beekeepers. Respondents noted that finding employees in general is a challenge, in addition to finding staff physically able to do the job (there is a lot of heavy lifting).

7.0 Support, Communication, and Outreach Summary Data

When all respondents were asked about the level of importance of several of the OBA's activities, respondents felt the following were **fairly important or very important** (Appendix B):

- ✓ Advocating for the needs of Ontario's beekeepers with governments (83%)
- ✓ The technology transfer program (82%)
- ✓ Ontario bee breeders' association activities (79%)
- ✓ Providing learning opportunities for new or start up beekeepers (77%)
- ✓ Communicating the importance of local honey and bee products to the public (76%)

Fewer respondents felt the following activities were **fairly important or very important**:

- Ontario Mead Makers' Association activities (37%)
- Ontario Honeybee Pollination Association activities (60%)

When all respondents were asked about the level of agreement regarding several OBA communication and outreach activities, respondents **agreed or strongly agreed** to the following statements (Appendix C):

- ✓ Communication about pressing industry news/information in a timely manner (67%)
- ✓ The Tech Transfer Program YouTube channel provides valuable and helpful information (68%)
- ✓ The information in the Ontario Bee Journal is informative (75%)
- ✓ Social media conversations help clarify, direct, and address important information (62%)
- ✓ The monthly e-newsletter is timely, informative, and is up to date on events, training, funding, and opportunities (62%)

Overall, all survey respondents feel that the quality of communications from the OBA is excellent (22%) or good (54%). Some (20%) feel that the quality is fair. Of those who think the quality of communication is poor or very poor, most (56%) are not members.

Appendices

Appendix A: Regional Breakdown

Region	Municipality	Number of Respondents
Southern Ontario	BRANT	17
	CHATHAM-KENT	11
	ELGIN	13
	ESSEX	16
	HALDIMAND-NORFOLK	14
	HAMILTON	13
	LAMBTON	5
	MIDDLESEX	14
	NIAGARA	14
	OXFORD	6
	Western Ontario	BRUCE
DUFFERIN		15
GREY		24
HALTON		11
HURON		16
PEEL		9
PERTH		4
SIMCOE		20
WATERLOO		19
WELLINGTON		34
Central Ontario		DURHAM
	HALIBURTON	3
	HASTINGS	16
	KAWARTHA LAKES	9
	MUSKOKA	6
	NORTHUMBERLAND	11
	PARRY SOUND	6
	PETERBOROUGH	16
	PRINCE EDWARD COUNTY	9
	TORONTO	20
	Eastern Ontario	FRONTENAC
LANARK		14
LEEDS AND GRENVILLE		8
LENNOX AND ADDINGTON		3
OTTAWA		19
PRESCOTT AND RUSSELL		4
RENFREW		13

	STORMONT, DUNDAS AND GLENGARRY	8
Northern Ontario	ALGOMA	14
	COCHRANE	4
	GREATER SUDBURY (CITY)	8
	KENORA	3
	MANITOULIN	2
	NIPISSING	9
	RAINY RIVER	3
	SUDBURY (DISTRICT)	5
	THUNDER BAY	2
	TIMISKAMING	6

Appendix B: Respondents' answers to the level of importance for various OBA activities

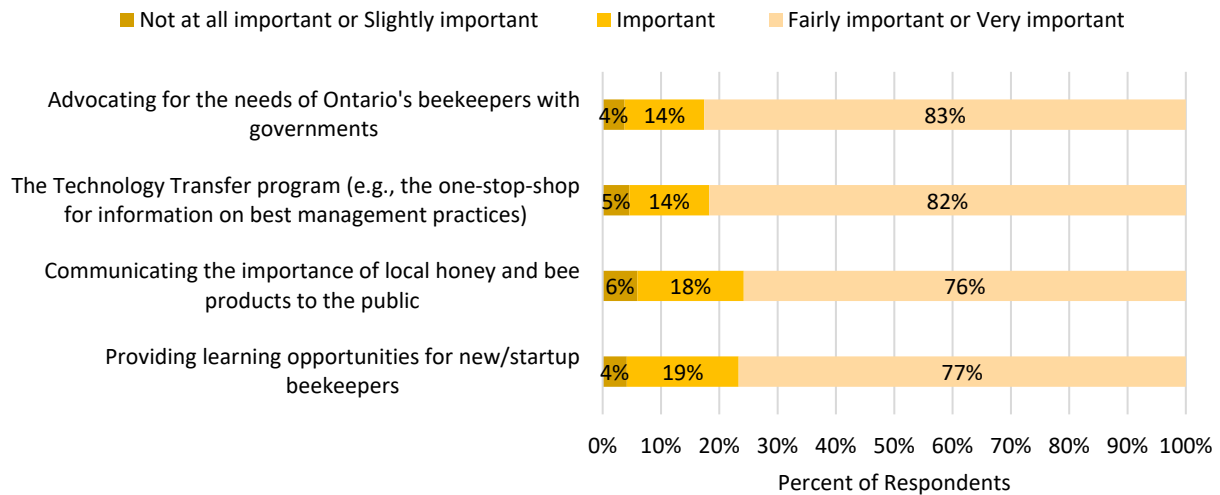


Figure 22. Respondents' answers to the level of important of various activities regarding the OBA supporting Ontario beekeepers. (n=506)

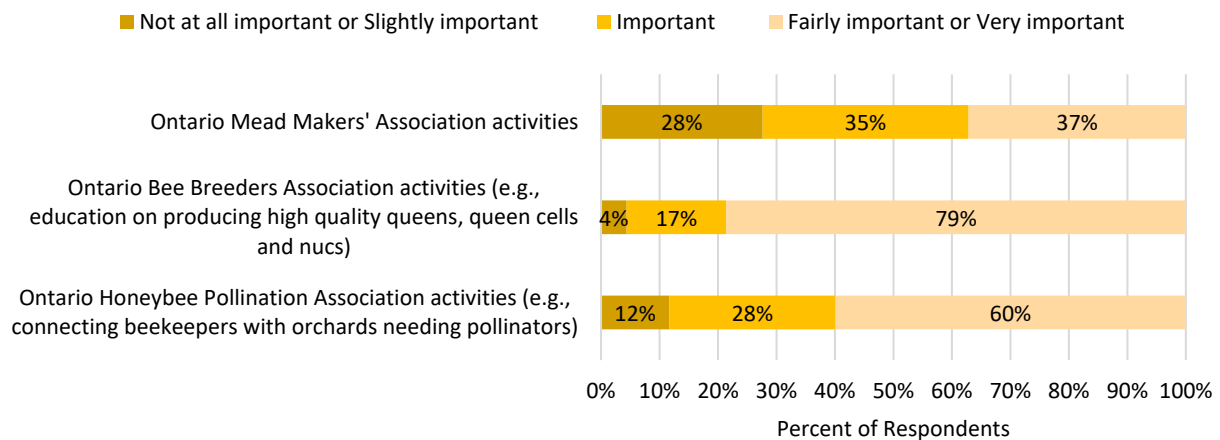


Figure 23. Respondents' answers to the level of importance of various activities regarding the OBA supporting Ontario beekeepers. (n=506)

Appendix C: Respondents' answers to their level of agreement on various topics related to OBA communication and outreach

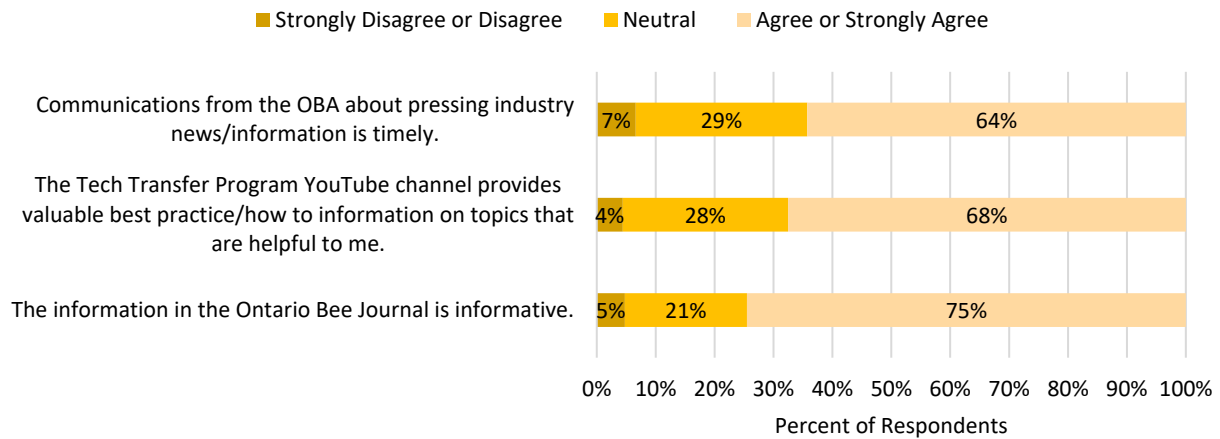


Figure 24. Respondents' answers to the level of agreement of various statements regarding the OBA's communications and outreach. (n=505)

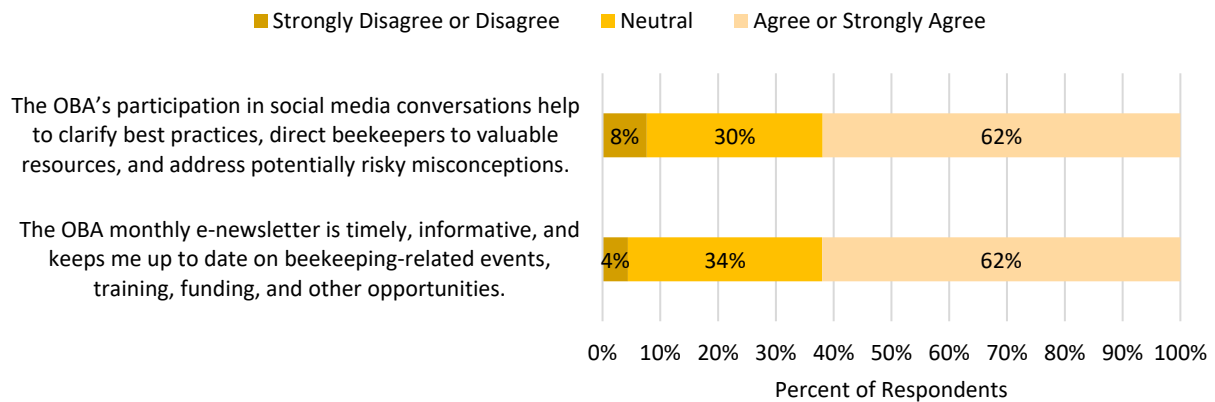


Figure 25. Respondents' answers to the level of agreement of various statements regarding the OBA's communications and outreach. (n=505)