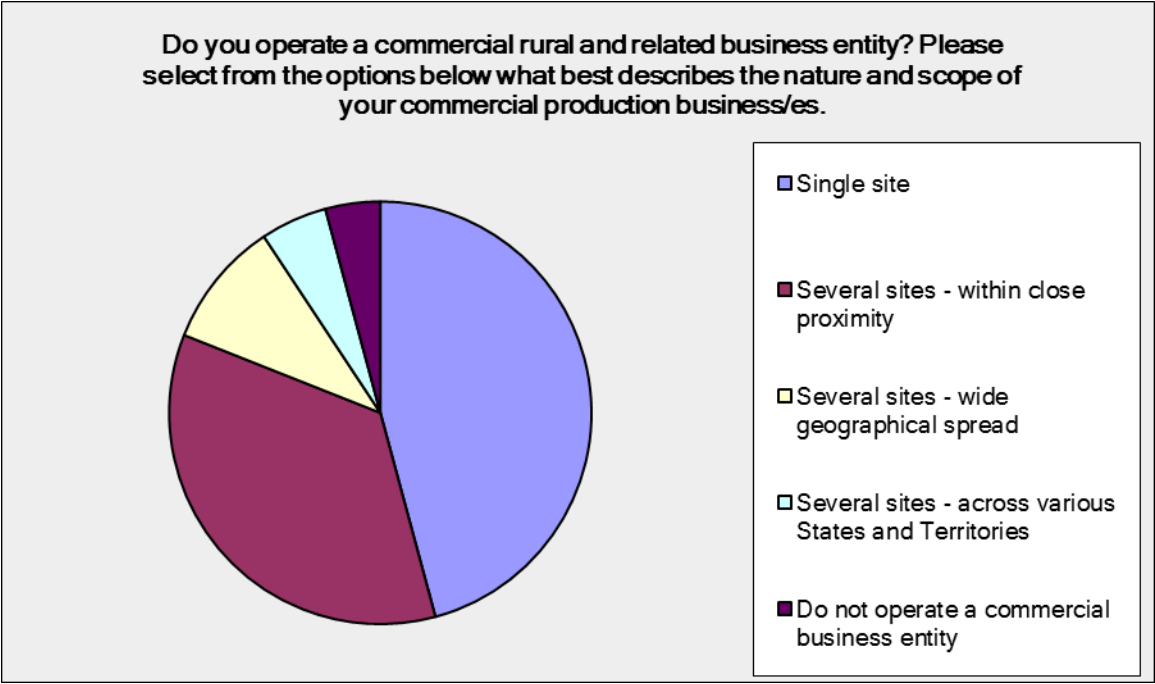


ATTACHMENT C- FARM SECTOR SURVEY RESULTS

Q1 Do you operate a commercial rural and related business entity? Please select from the options below what best describes the nature and scope of your commercial production business/es.

Answered: 499 Skipped: 2



Answer Choices	Responses	
Single site	45.49%	227
Several sites - within c lose proximity	35.47%	177
Several sites - wide geographic al spread	9.22%	46
Several sites - ac ross various States and Territories	5.21%	26
Do not operate a commercial business entity	4.61%	23
Total		499

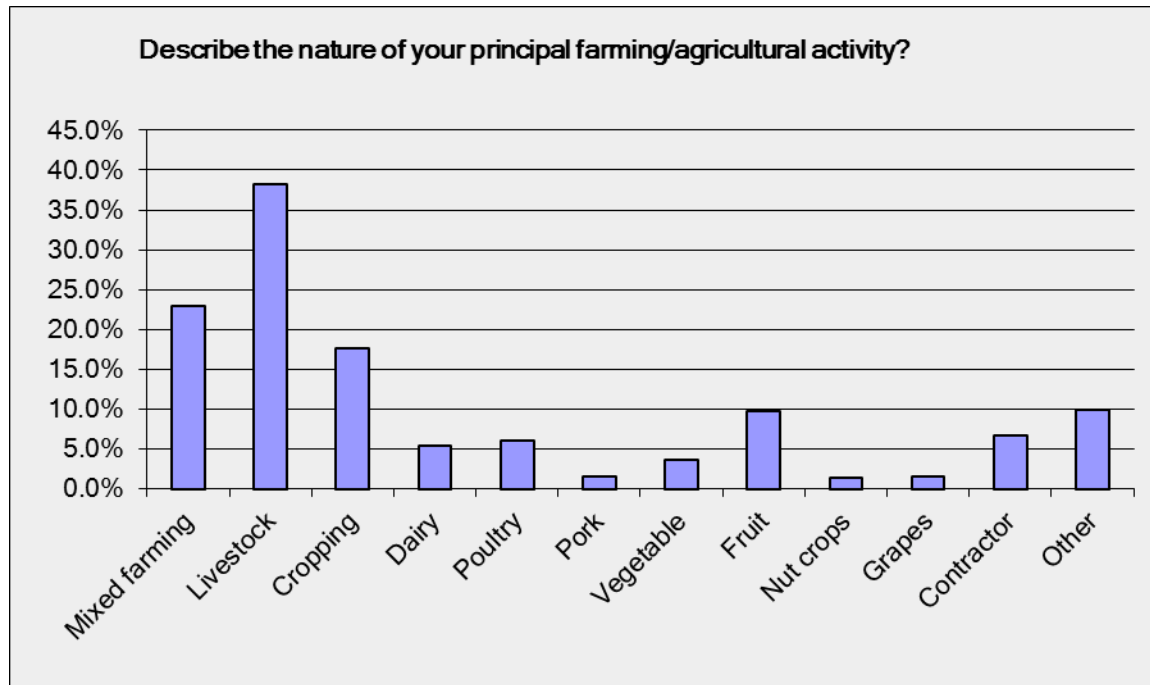
Q2 In which State/Territory is your principal farm or agricultural business? If you operate farming businesses/entities in more than one State/Territory, please indicate which jurisdictions.

Answered: 497 Skipped: 4



Answer Choices	Responses	
New South Wales	33.20%	165
Queensland	18.11%	90
Victoria	19.32%	96
South Australia	6.84%	34
Western Australia	20.93%	104
Tasmania	6.24%	31
Northern Territory	4.23%	21
ACT	0.40%	2
All States	0%	0
Total Respondents: 497		

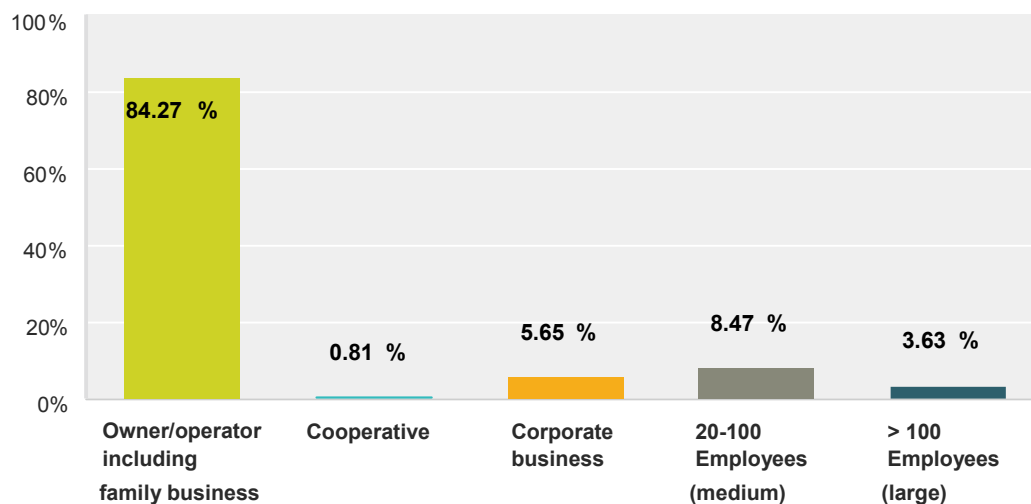
Q3 Describe the nature of your principal farming/agricultural activity.



Answer Choices	Responses	
Mixed farming	22.98%	114
Livestock	38.31%	190
Cropping	17.74%	88
Dairy	5.44%	27
Poultry	6.05%	30
Pork	1.61%	8
Vegetable	3.63%	18
Fruit	9.68%	48
Nut crops	1.41%	7
Grapes	1.61%	8
Contractor	6.65%	33
Other	9.88%	49
Total Respondents: 496		

Q4 What best describes the nature of your enterprise/s?

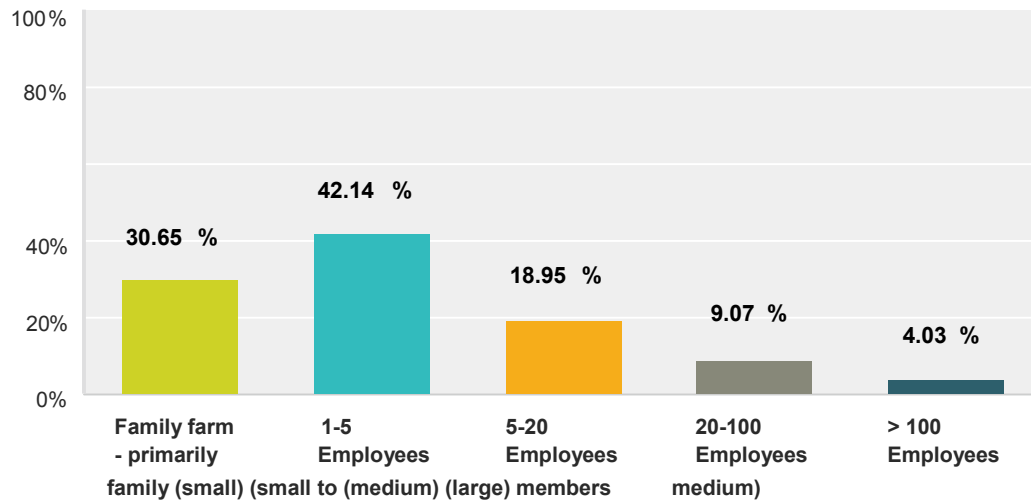
Answered: 496 Skipped: 5



Answer Choices	Responses	
Owner/operator including family business	84.27%	418
Cooperative	0.81%	4
Corporate business	5.65%	28
20-100 Employees (medium)	8.47%	42
> 100 Employees (large)	3.63%	18
Total Respondents: 496		

Q5 Which of the options below best describes the size of your enterprise/s? Please include permanent, casual and part- time employees.

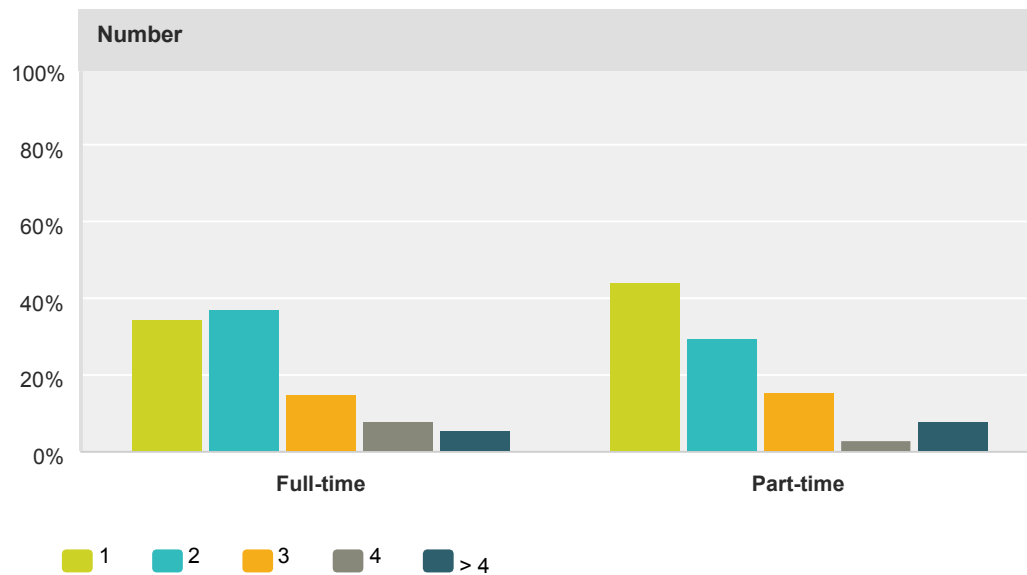
Answered: 496 Skipped: 5



Answer Choices	Responses	
Family farm - primarily family members employed only	30.65%	152
1-5 Employees (small)	42.14%	209
5-20 Employees (small to medium)	18.95%	94
20-100 Employees (medium)	9.07%	45
> 100 Employees (large)	4.03%	20
Total Respondents: 496		

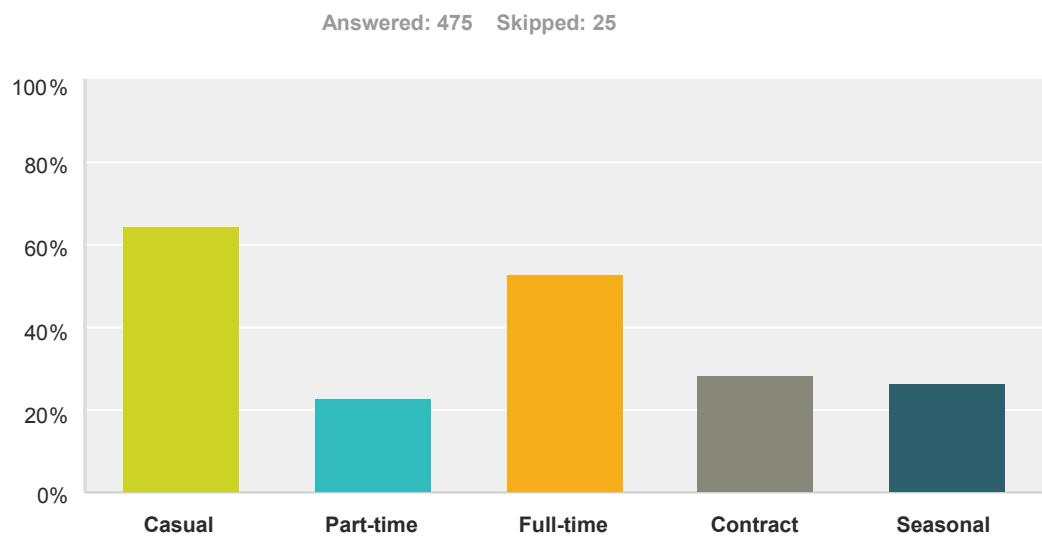
Q6 How many family members or business partners are involved with your enterprise on a full-time and/or part-time basis? Family members can include partners/spouses, parents, sons, daughters, brothers, sisters, aunts, uncles etc

Answered: 447 Skipped: 54



Number						
	1	2	3	4	> 4	Total
Full-time	35.01% 139	37.03% 147	14.86% 59	7.81% 31	5.29% 21	397
Part-time	42.91% 118	30.18% 83	16% 44	3.27% 9	7.64% 21	275

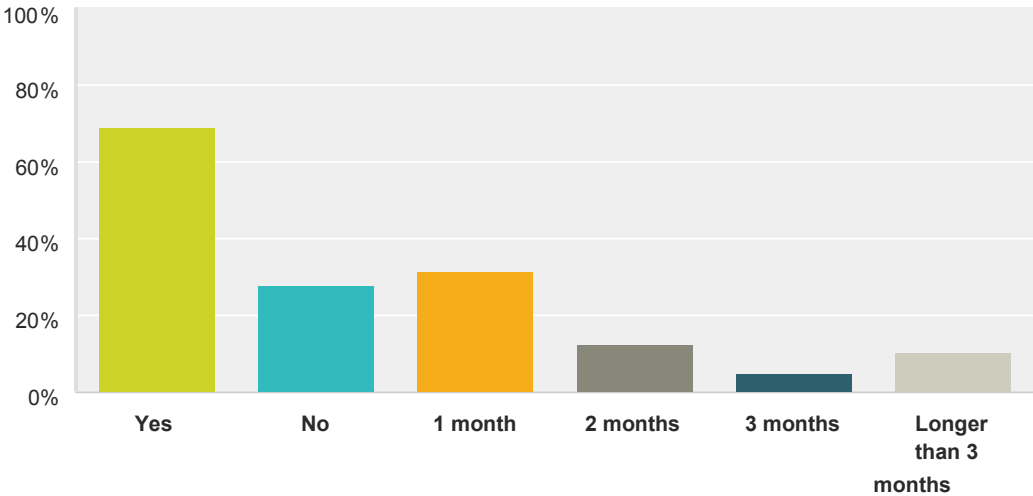
Q7 On what basis do you employ staff, if any?



Answer Choices	Responses	
Casual	65.89%	313
Part-time	22.95%	109
Full-time	52.21%	248
Contract	28.21%	134
Seasonal	25.26%	120
Total Respondents: 475		

Q8 In the last 12 months have you employed or attempted to employ rural and related workers? If yes, please confirm whether you were successful and the time taken to complete the recruitment process.

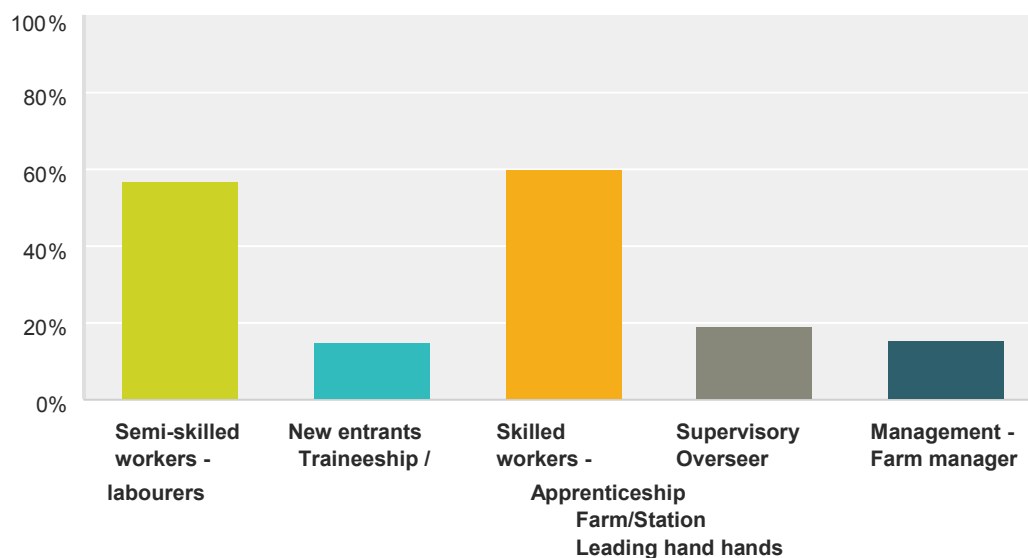
Answered: 493 Skipped: 8



Answer Choices	Responses	
Yes	68.97%	340
No	28.40%	140
1 month	31.24%	154
2 months	12.37%	61
3 months	4.87%	24
Longer than 3 months	10.75%	53
Total Respondents: 493		

Q9 Please describe the nature of your labour / workforce requirements.

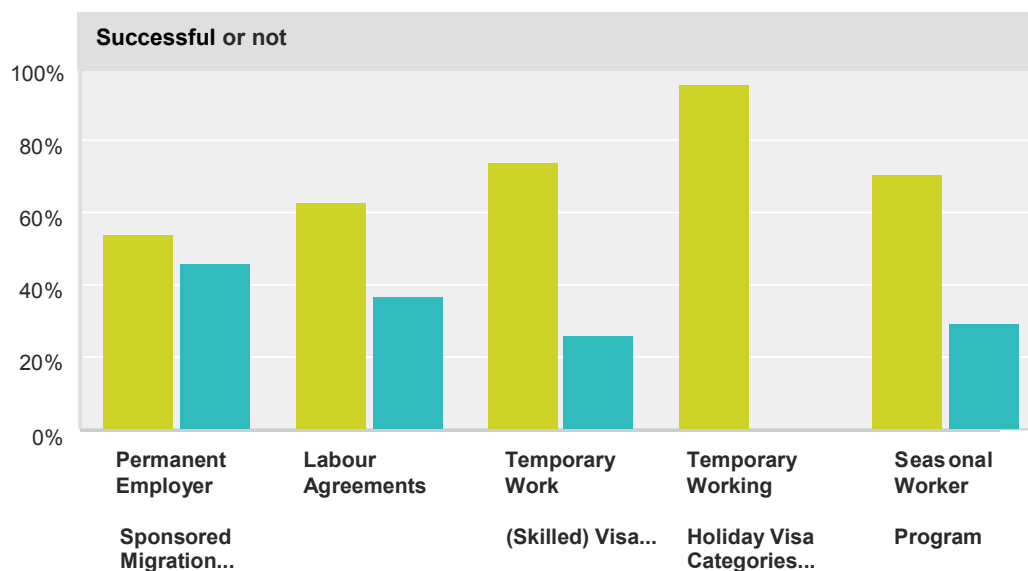
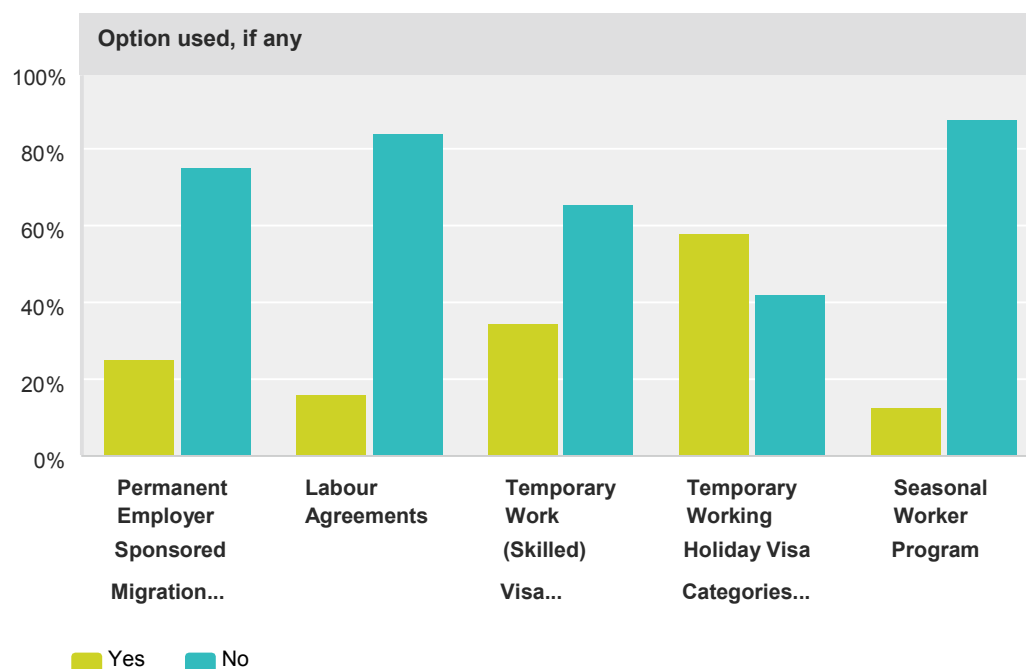
Answered: 441 Skipped: 35

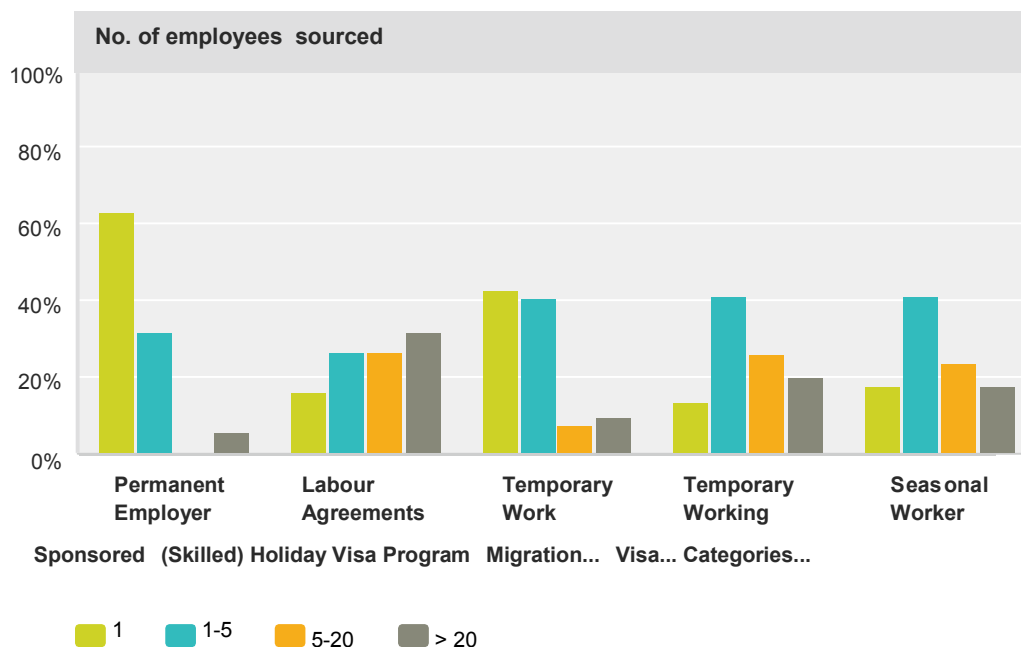


Answer Choices	Responses	
Semi-skilled workers - labourers	56.68%	263
New entrants - Traineeship/Apprenticeship	15.09%	70
Skilled workers - Farm/Station hands	59.70%	277
Supervisory - Overseer/Leading hand	18.97%	88
Management - Farm manager	15.52%	72
Total Respondents: 464		

Q10 Have you engaged with or attempted to utilise options available through the Australian Migration system to access employees? If yes, please identify which options from the list below, and confirm whether you were successful or not, or expect to be successful or not, and the number of employees effectively sourced.

Answered: 279 Skipped: 222



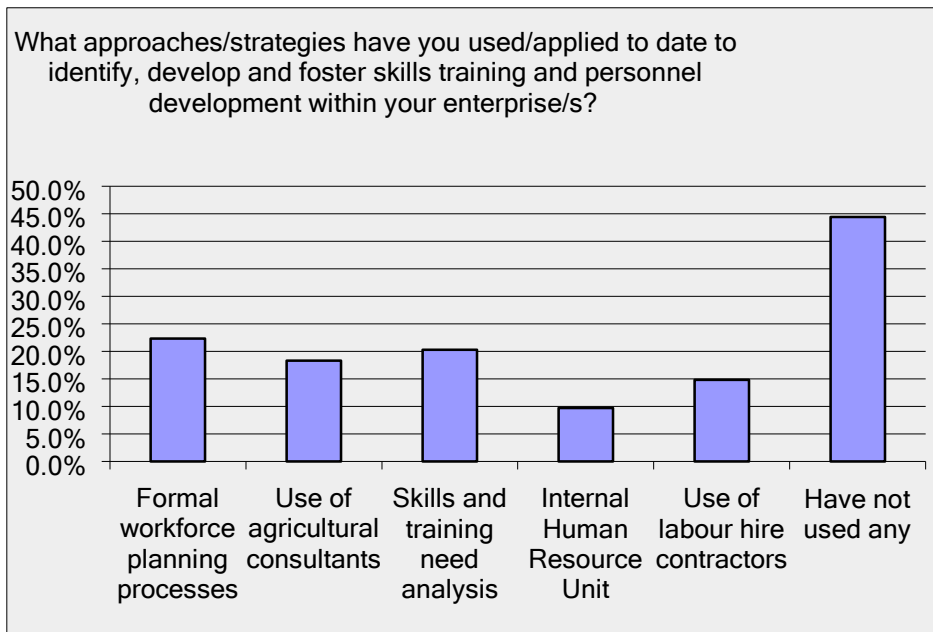


Option used, if any	Yes	No	Total
Permanent Employer Sponsored Migration Program	24.43% 43	75.57% 133	176
Labour Agreements	15.58% 24	84.42% 130	154
Temporary Work (Skilled) Visa (subclass 457) - 457 Visa	34.48% 60	65.52% 114	174
Temporary Working Holiday Visa Categories - Backpackers	57.69% 135	42.31% 99	234
Seasonal Worker Program	12.50% 19	87.50% 133	152
Successful or not	Yes	No	Total
Permanent Employer Sponsored Migration Program	54.72% 29	45.28% 24	53
Labour Agreements	62.96% 17	37.04% 10	27
Temporary Work (Skilled) Visa (subclass 457) - 457 Visa	74.60% 47	25.40% 16	63
Temporary Working Holiday Visa Categories - Backpackers	95.45% 126	4.55% 6	132
Seasonal Worker Program	71.43% 20	28.57% 8	28

No. of employees sourced	1	1-5	5-20	> 20	Total
Permanent Employer Sponsored Migration Program	63.89% 23	30.56% 11	0% 0	5.56% 2	36
Labour Agreements	15.79% 3	26.32% 5	26.32% 5	31.58% 6	19
Temporary Work (Skilled) Visa (subclass 457) - 457 Visa	44.44%	38.89%	7.41%	9.26%	
	24	21	4	5	54
Temporary Working Holiday Visa Categories - Backpackers	12.80%	41.60%	26.40%	19.20%	
	16	52	33	24	125
Seasonal Worker Program	16.67%	38.89%	22.22%	22.22%	
	3	7	4	3	18

Q11 What approaches/strategies have you used/applied to date to identify, develop and foster skills training and personnel development within your enterprise/s?

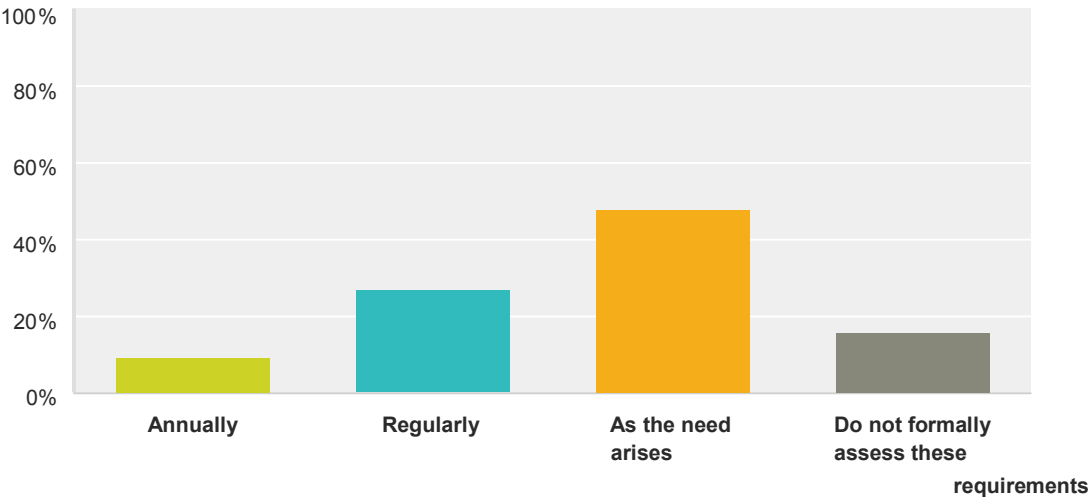
Answered: 476 Skipped: 25



Answer Choices	Responses	
Formal workforce planning processes	22.48%	107
Use of agricultural consultants	18.28%	87
Skills and training need analysis	19.96%	95
Internal Human Resource Unit	9.66%	46
Use of labour hire contractors	14.71%	70
Have not used any	44.54%	212
Total Respondents: 476		

Q12 On what basis would you assess your labour, skills and other workforce development requirements?

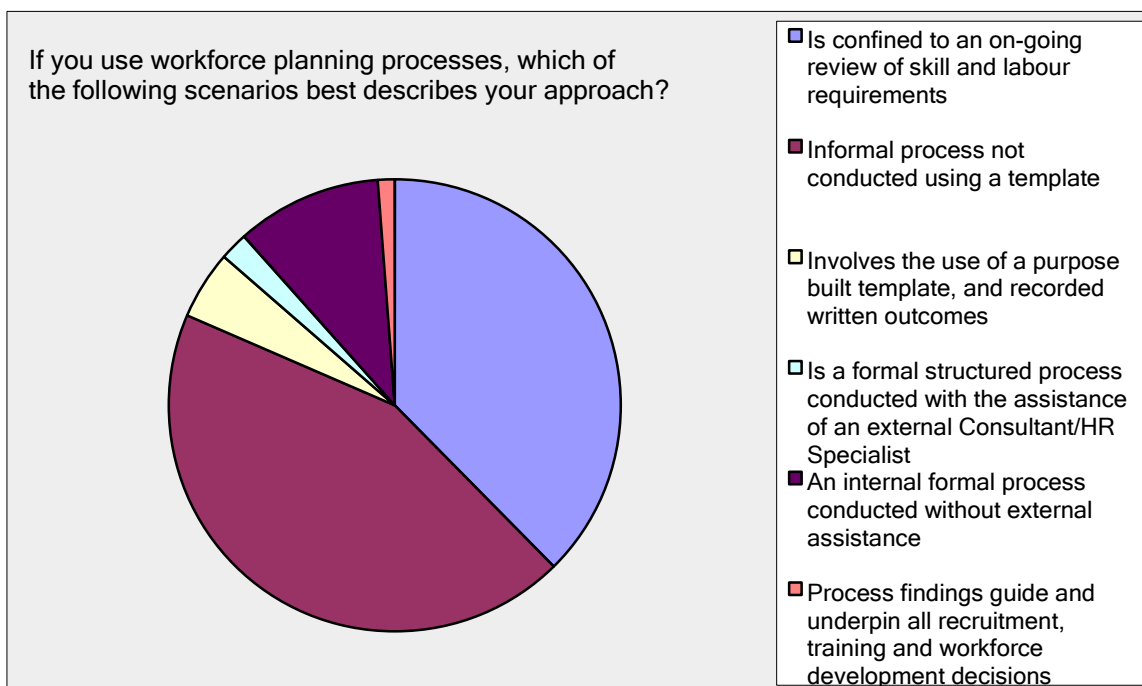
Answered: 490 Skipped: 11



Answer Choices	Responses	
Annually	9.59%	47
Regularly	26.33%	129
As the need arises	48.37%	237
Do not formally assess these requirements	15.71%	77
Total		490

Q13 If you use workforce planning processes, which of the following scenarios best describes your approach?

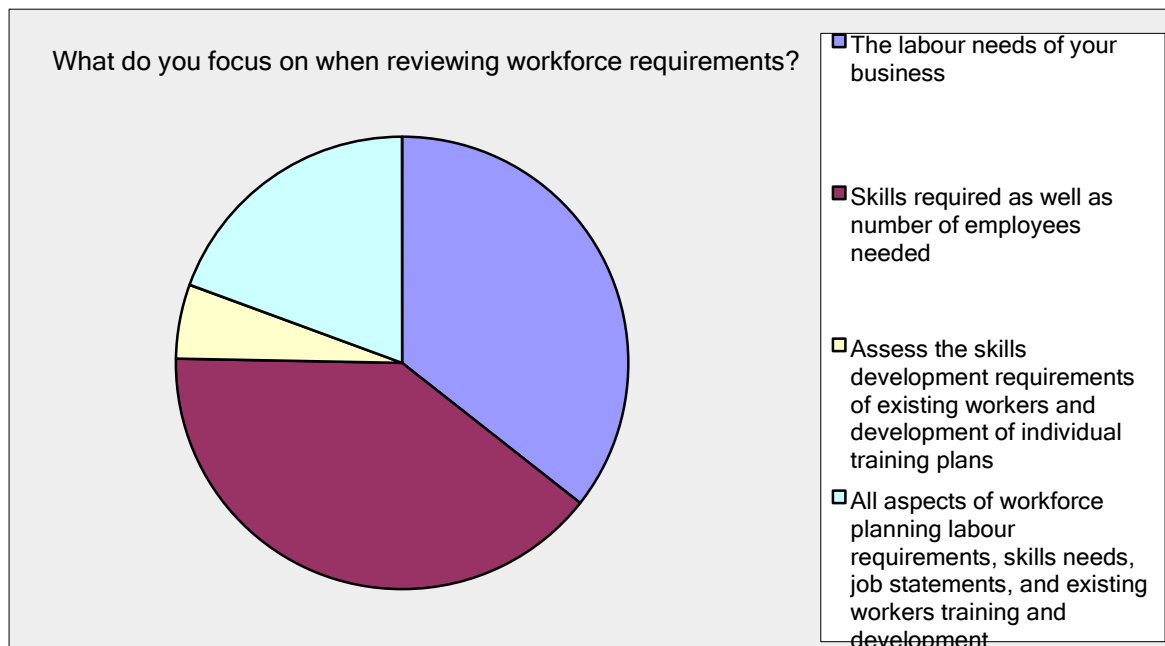
Answered: 363 Skipped: 138



Answer Choices	Responses	
Is confined to an on-going review of skill and labour requirements	37.47%	136
Informal process not conducted using a template	43.80%	159
Involves the use of a purpose built template, and recorded written outcomes	5.23%	19
Is a formal structured process conducted with the assistance of an external Consultant/HR Specialist	1.93%	7
An internal formal process conducted without external assistance	10.47%	38
Process findings guide and underpin all recruitment, training and workforce development decisions	1.10%	4
Total		363

Q14 What do you focus on when reviewing workforce requirements?

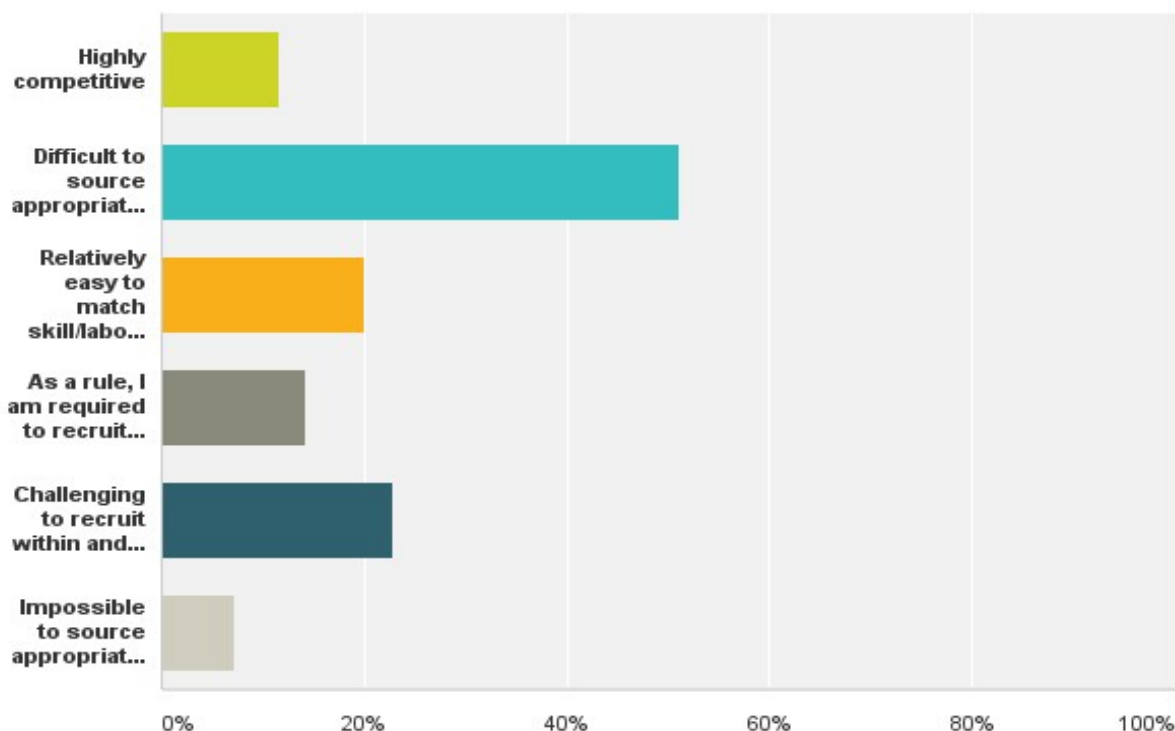
Answered: 455 Skipped: 46



Answer Choices	Responses	
The labour needs of your business	36.48%	166
Skills required as well as number of employees needed	39.12%	178
Assess the skills development requirements of existing workers and development of individual training plans	5.27%	24
All aspects of workforce planning labour requirements, skills needs, job statements, and existing workers training and development	19.12%	87
Total		455

Q15 Which of the following scenarios best describes the nature of the labour market within a three hundred kilometre radius of the location of your principal farming/agricultural enterprise?

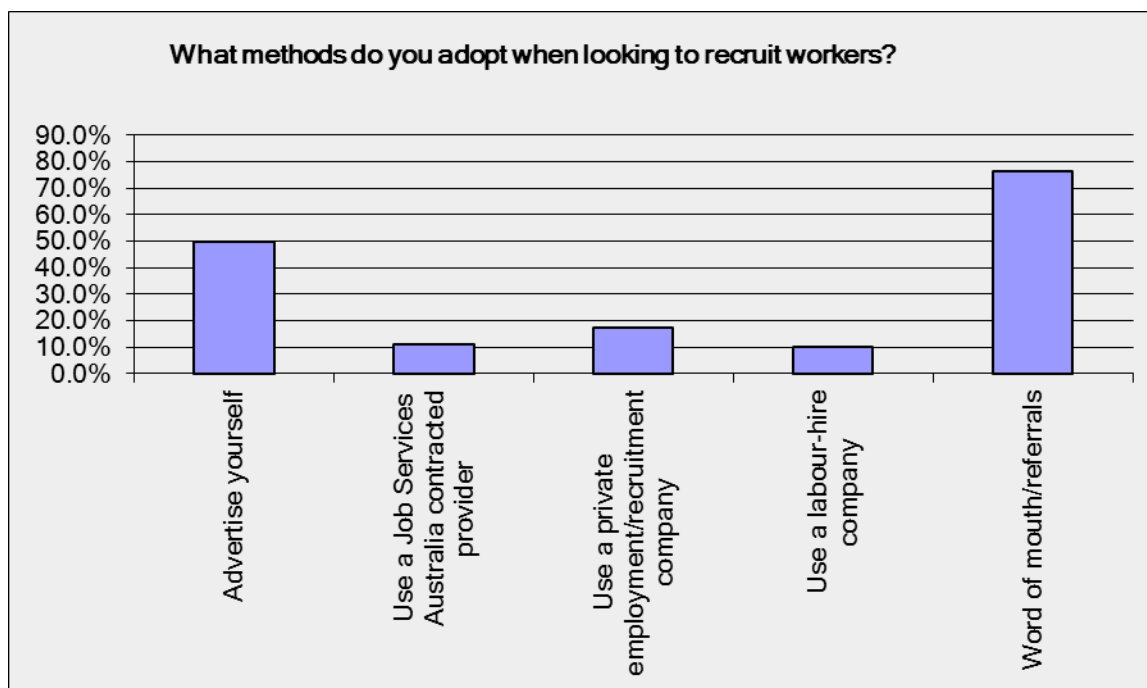
Answered: 480 Skipped: 21



Answer Choices	Responses	
Highly competitive	11.67%	56
Difficult to source appropriately skilled and trained personnel	51.04%	245
Relatively easy to match skill/labour needs within the immediate area	20%	96
As a rule, I am required to recruit from outside my local area	14.17%	68
Challenging to recruit within and outside my local/regional area	22.92%	110
Impossible to source appropriately skilled personnel	7.29%	35
Total Respondents: 480		

Q16 What methods do you adopt when looking to recruit workers?

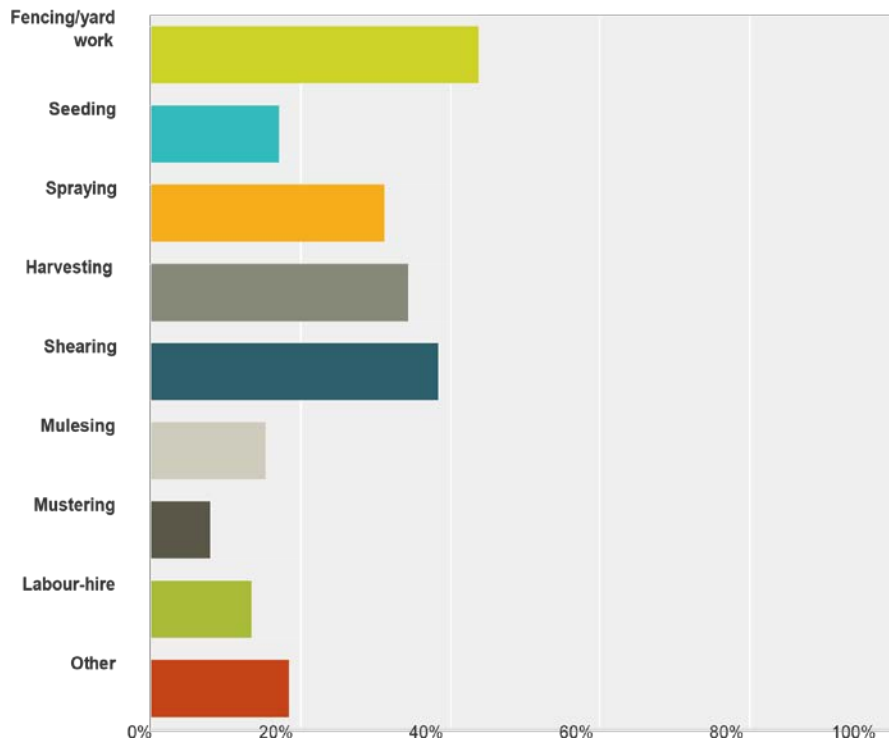
Answered: 479 Skipped: 22



Answer Choices	Responses	
Advertise yourself	49.90%	239
Use a Job Services Australia contracted provider	10.86%	52
Use a private employment/recruitment company	17.12%	82
Use a labour-hire company	10.23%	49
Word of mouth/referrals	76.41%	366
Total Respondents: 479		

Q17 Does your enterprise/s use contractors? If yes, please identify range of services.

Answered: 401 Skipped: 100



Answer Choices	Responses
Fencing/yard work	43.89% 176
Seeding	17.21% 69
Spraying	31.17% 125
Harvesting	34.41% 138
Shearing	38.40% 154
Mulesing	15.46% 62
Mustering	7.98% 32
Labour-hire	13.72% 55
Other	18.70% 75
Total Respondents: 401	

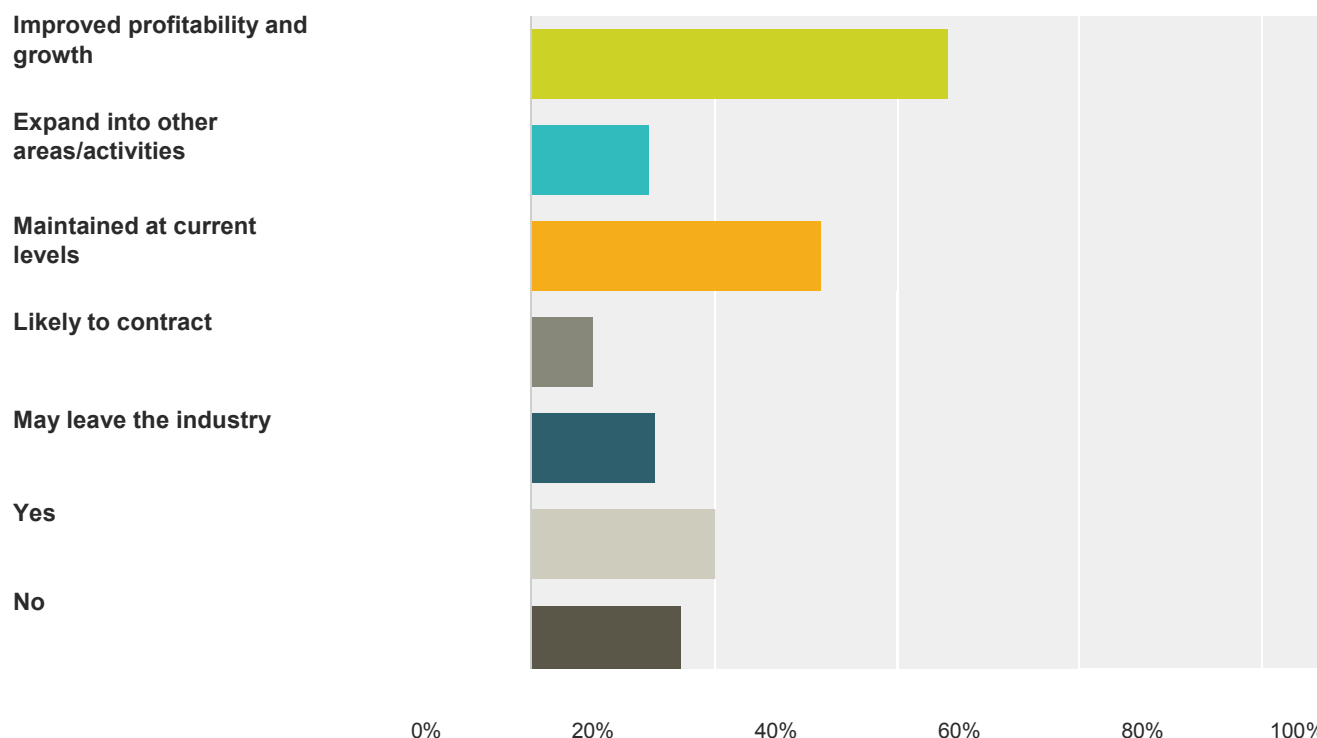
Q18 Is your use of contractors motivated or necessitated by difficulties in recruiting workers? If yes, please explain why?

Answered: 194 Skipped: 307

1 in 5 respondents indicated that their use of contractors is motivated or necessitated by difficulties in recruiting skilled workers.

Q19 Which of the following scenarios best describe your anticipated business performance over the next three to five years? If growth is expected, will it rely on you expanding your workforce?

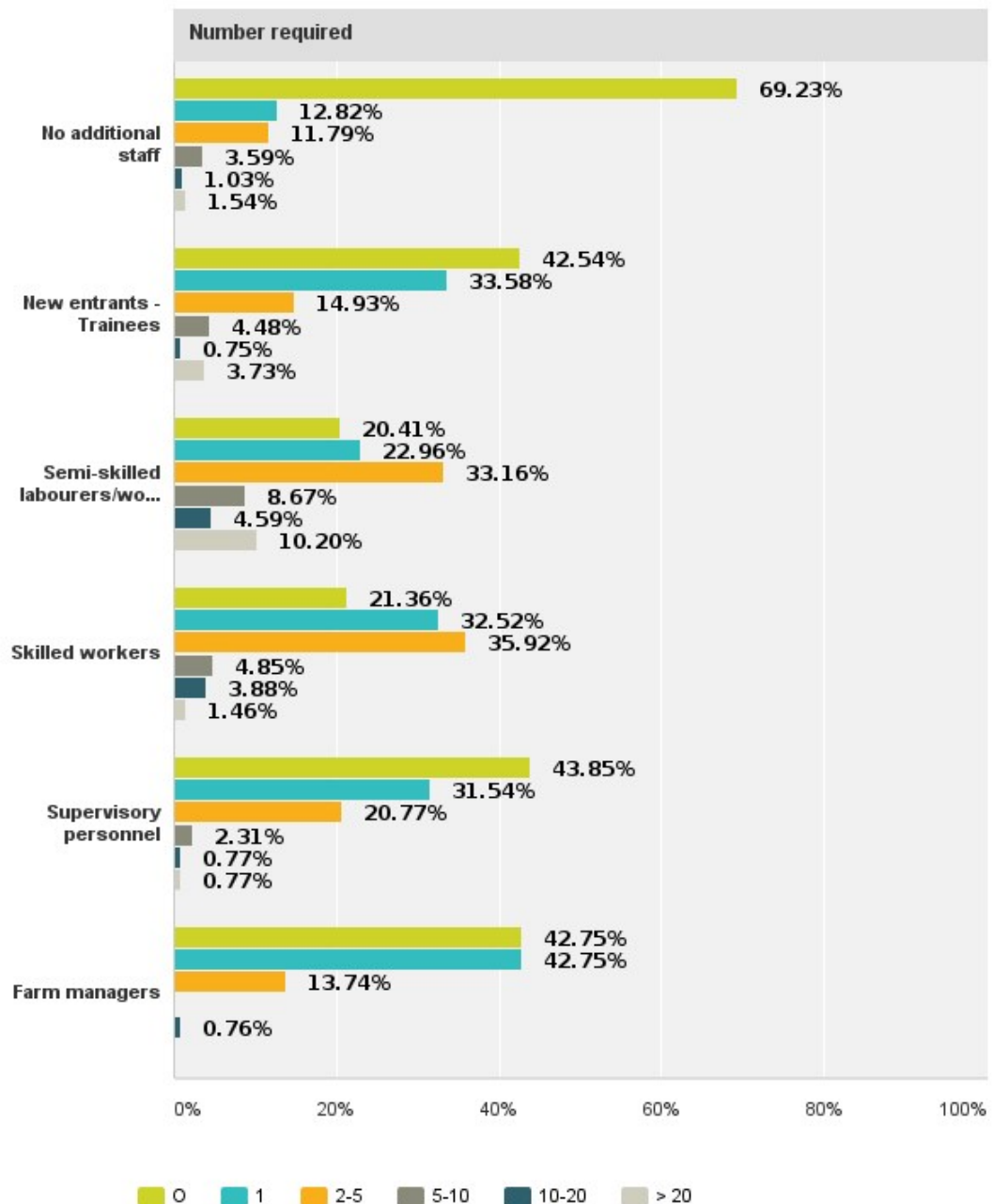
Answered: 496 Skipped: 5

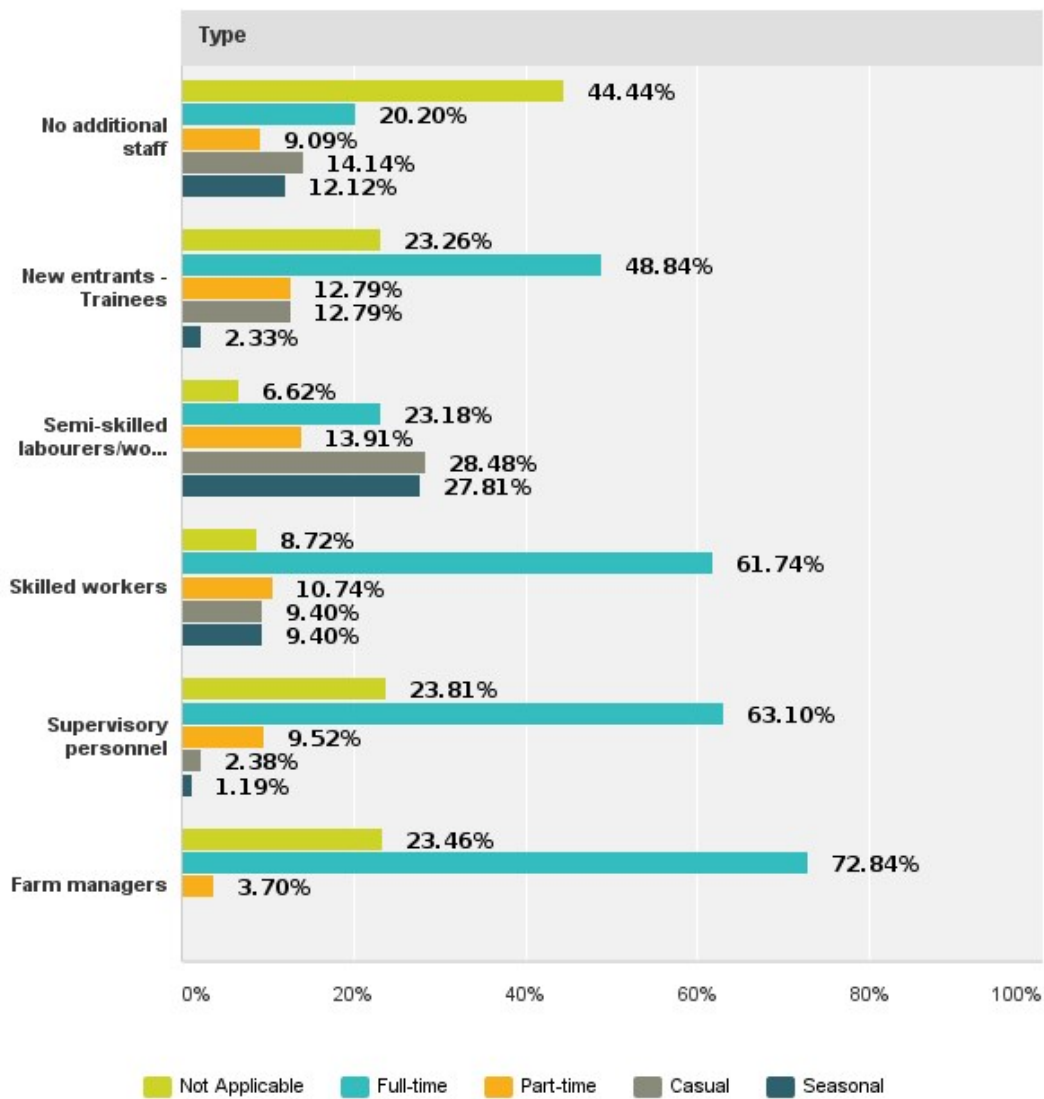


Answer Choices	Responses	
Improved profitability and growth	45.56%	226
Expand into other areas/activities	12.70%	63
Maintained at current levels	32.06%	159
Likely to contract	7.06%	35
May leave the industry	13.71%	68
Yes	20.56%	102
No	16.73%	83
Total Respondents: 496		

Q20 Please identify from the following list what type and number of employee/s will be required for your business/es to grow, over the next two to five years?

Answered: 431 Skipped: 70





Q21 In the last twelve months, have you or any of your employees undertaken any formal training? If yes, please provide course/skill set or training program name.

Answered: 287 Skipped: 214

40 % of respondents indicated that they or a member of their workforce had undertaken formal training in the last twelve months. 60% of respondents did not.

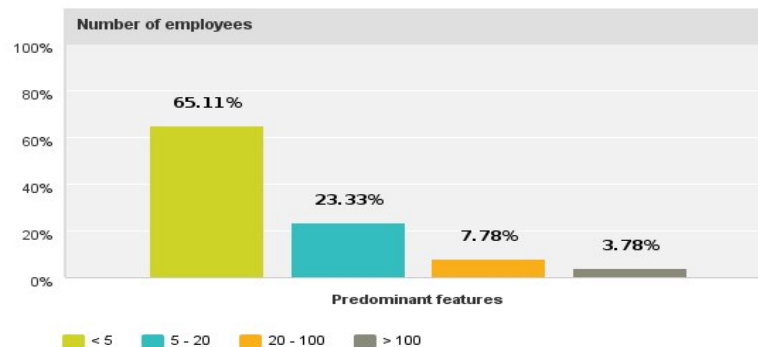
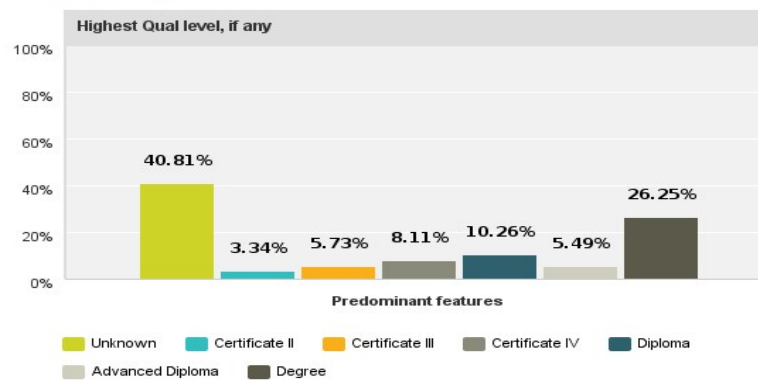
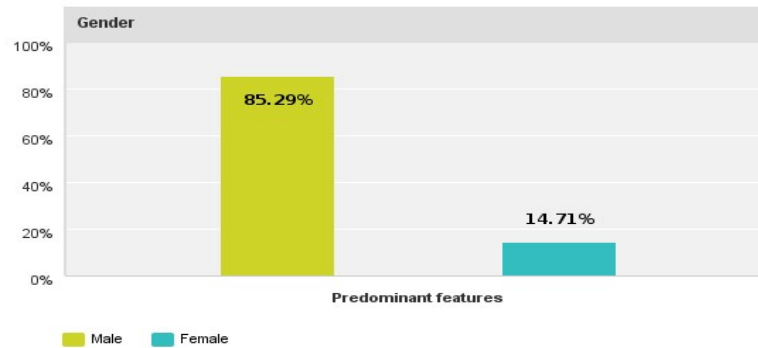
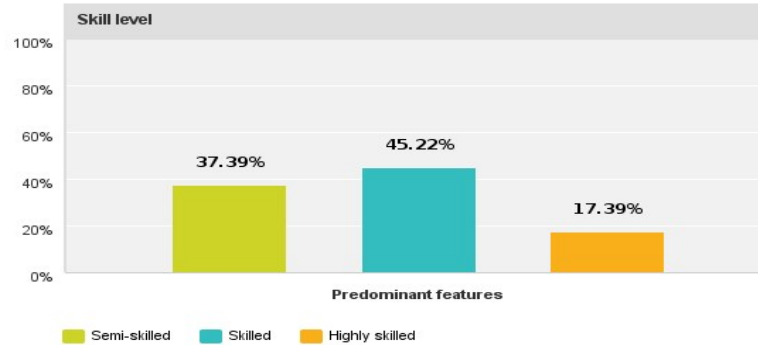
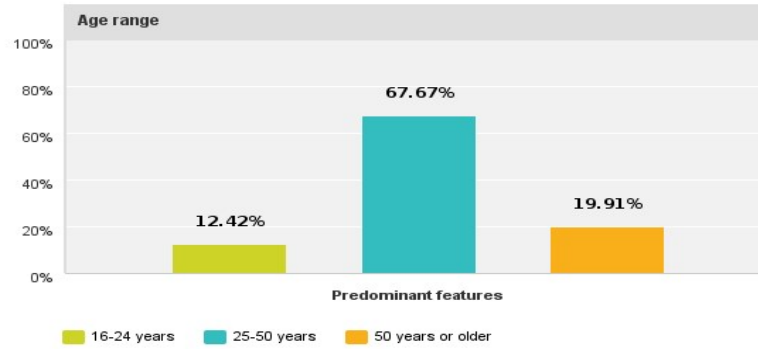
Q22 In the next six to twelve months, will you or any of your employees commence a course of formal study or look to complete a training program? If yes, please provide course, skill set or training program name/s.

Answered: 232 Skipped: 269

30 % of respondents indicated that they or a member of their workforce would undertake formal training or a training program in the next twelve months. 70% of respondents will not.

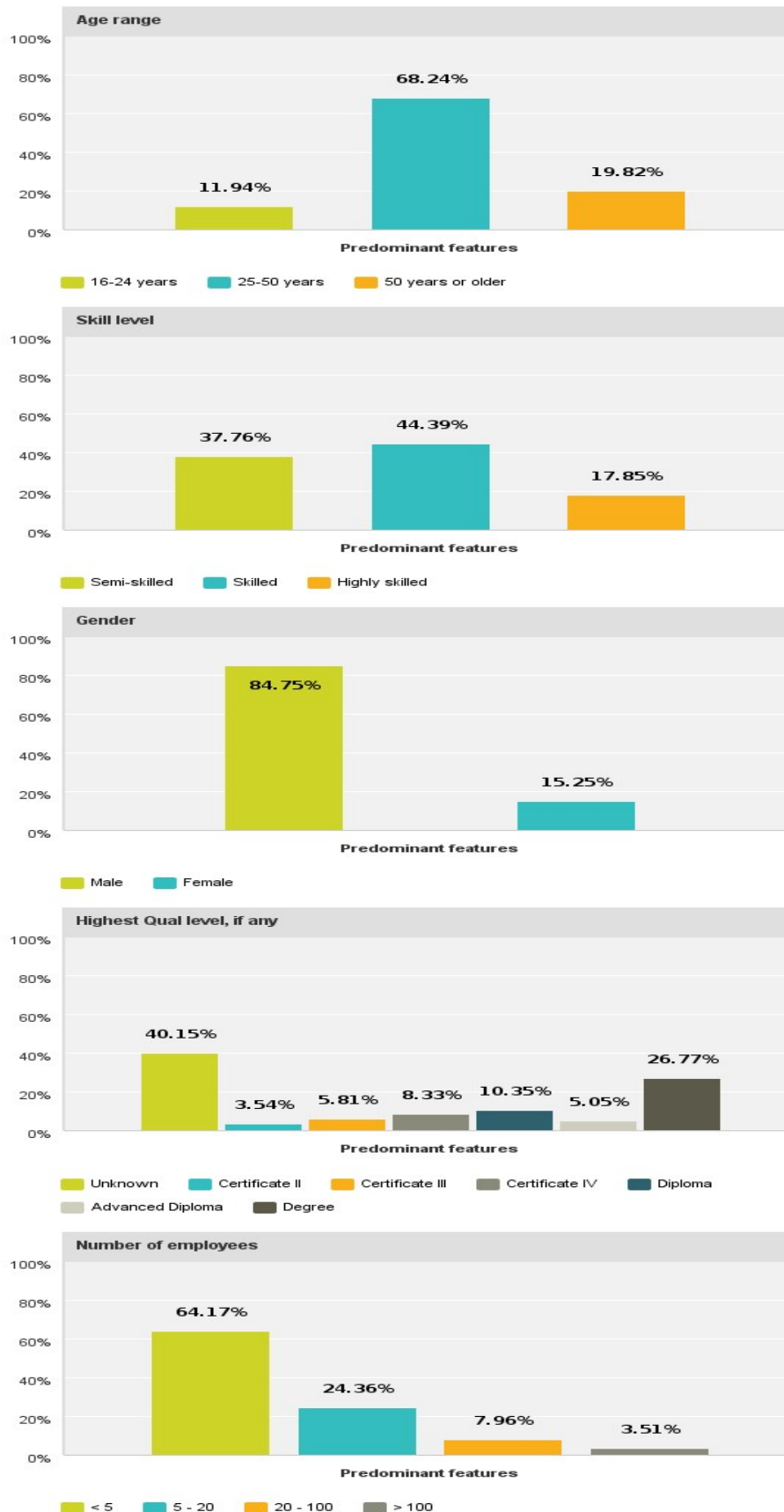
Q23 Please provide a snapshot of your workforce's demographic?

Answered: 469 Skipped: 32



Q23 Please provide a snapshot of your workforce's demographic?

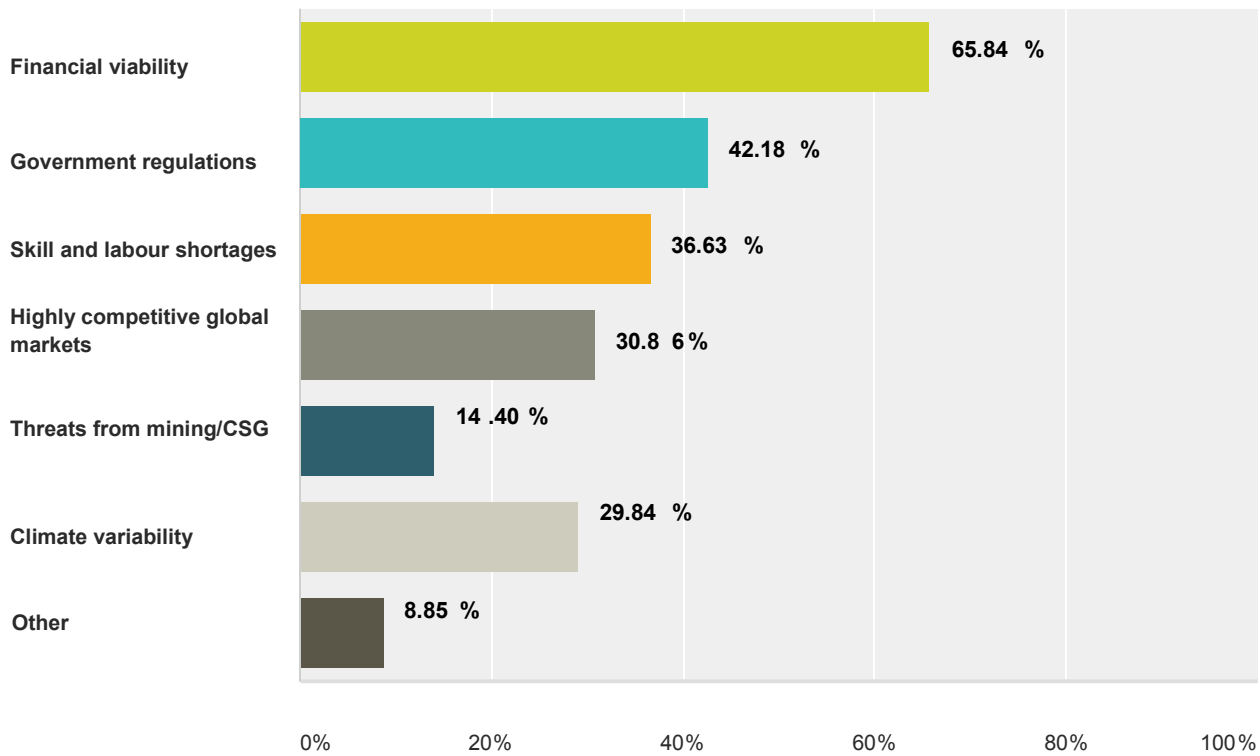
Answered: 446 Skipped: 30



Age range								
		16-24 years		25-50 years		50 years or older		Total
Predominant features		12.42% 58		67.67% 316		19.91% 93		467
Skill level								
		Semi-skilled		Skilled		Highly skilled		Total
Predominant features		37.39% 172		45.22% 208		17.39% 80		460
Gender								
				Male		Female		Total
Predominant features				85.29% 348		14.71% 60		408
Highest Qual level, if any								
	Unknown	Certificate II	Certificate III	Certificate IV	Diploma	Advanced Diploma	Degree	Total
Predominant features	40.81% 171	3.34% 14	5.73% 24	8.11% 34	10.26% 43	5.49% 23	26.25% 110	419
Number of employees								
		< 5		5 - 20		> 20		Total
Predominant features		65.11% 293		23.33% 105		7.78% 35		450

Q24 From your perspective, which of following challenges will have the greatest impact on your enterprise/s in the next three to five years?

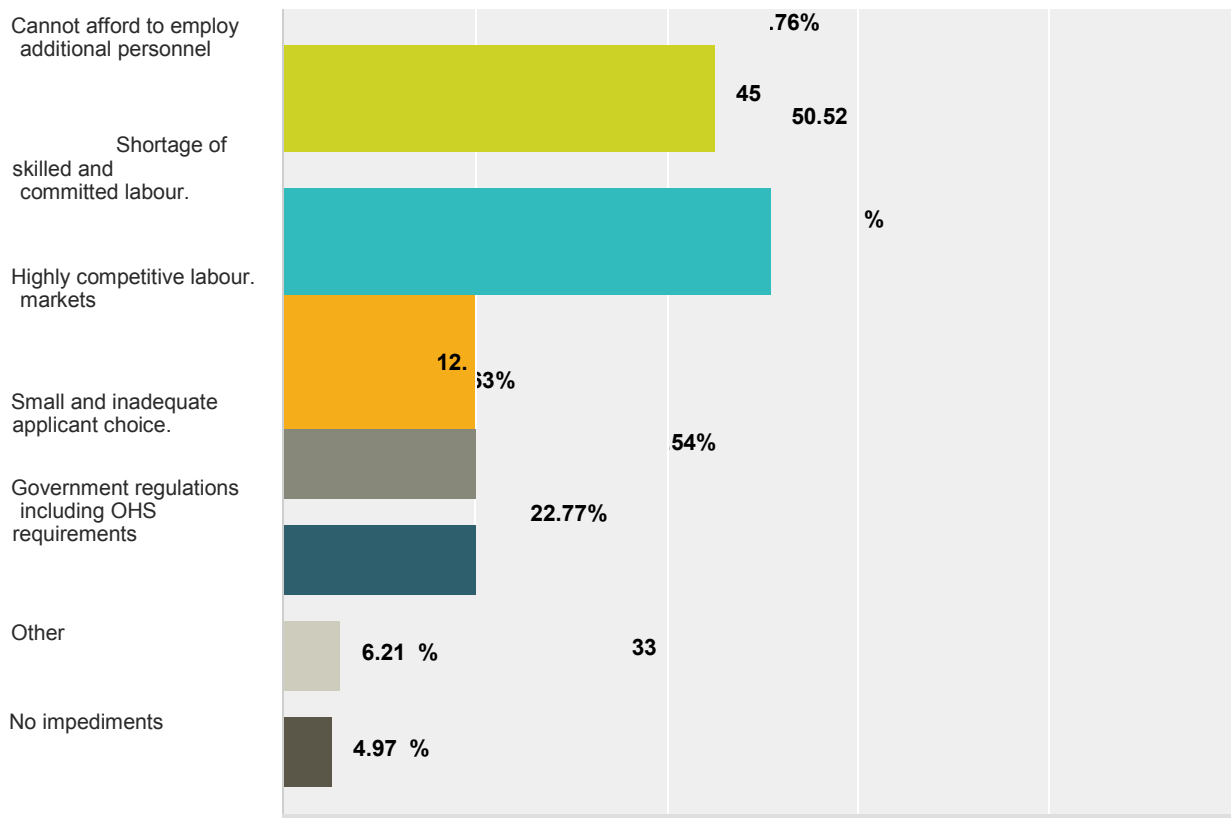
Answered: 486 Skipped: 15



Answer Choices	Responses	
Financial viability	65.84%	320
Government regulations	42.18%	205
Skill and labour shortages	36.63%	178
Highly competitive global markets	30.86%	150
Threats from mining/CSG	14.40%	70
Climate variability - including impacts of climate change	29.84%	145
Other	8.85%	43
Total Respondents: 486		

Q25 What provides the greatest impediment to employing rural and related workers?

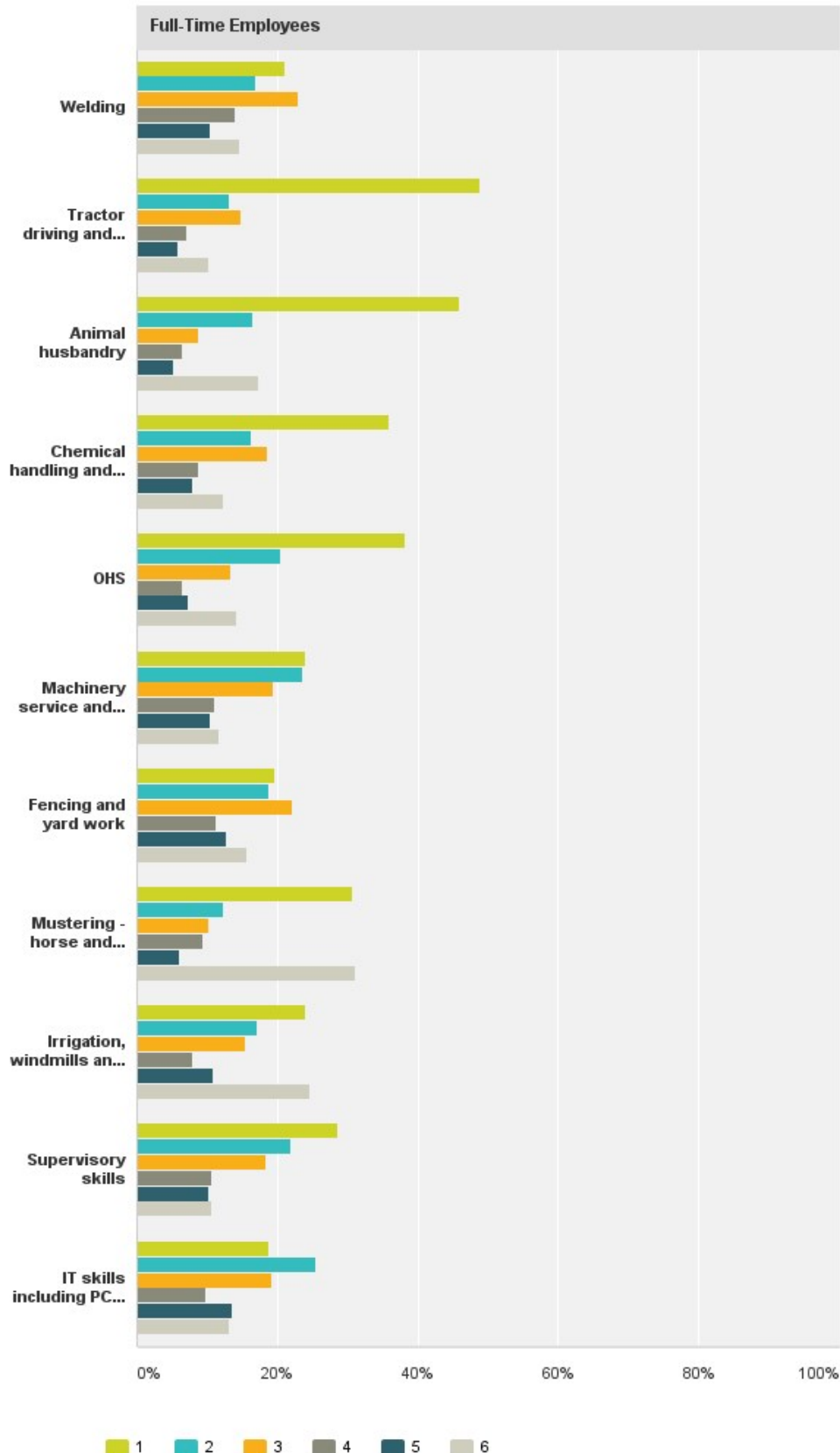
Answered: 483 Skipped: 18

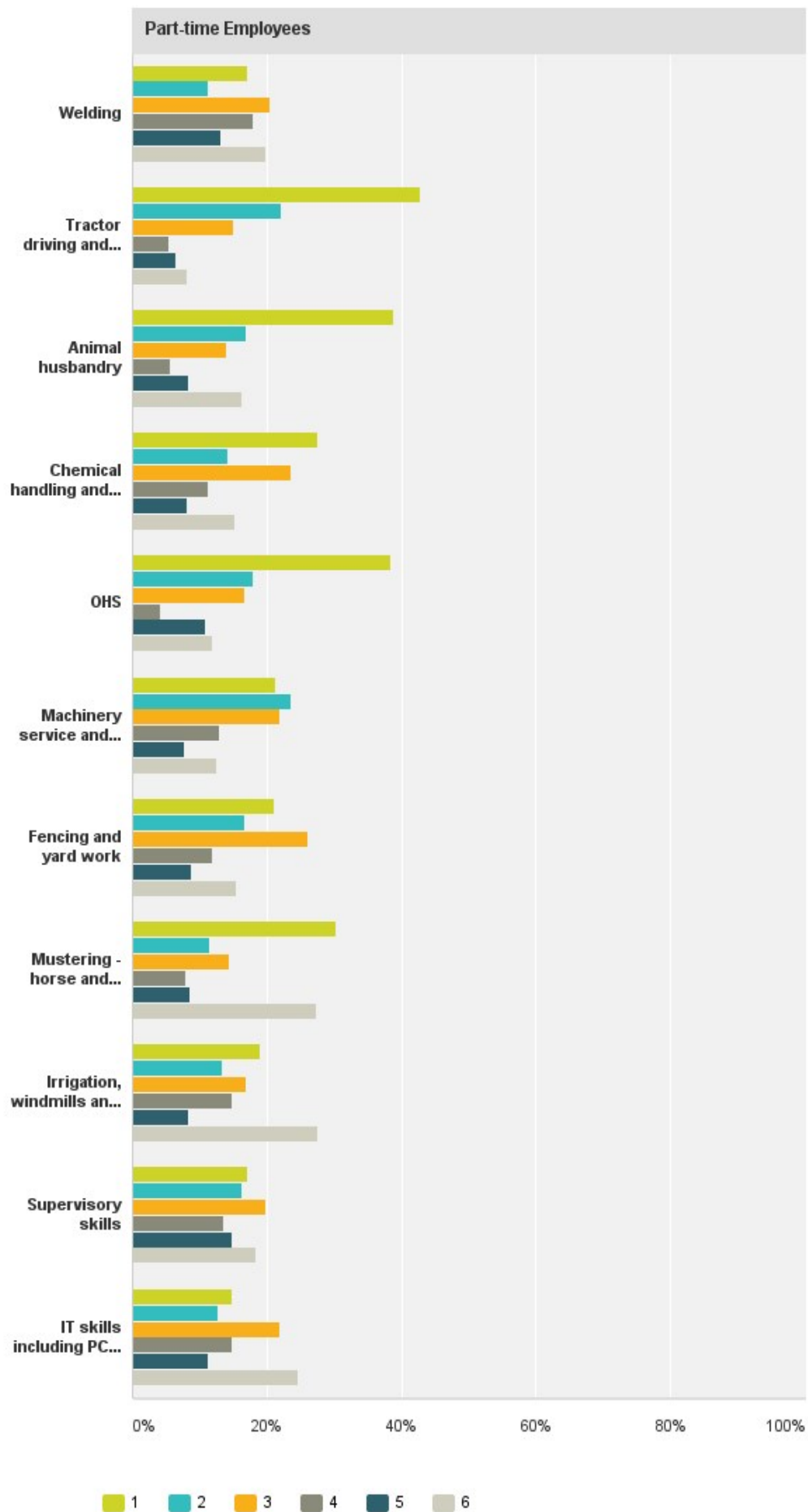


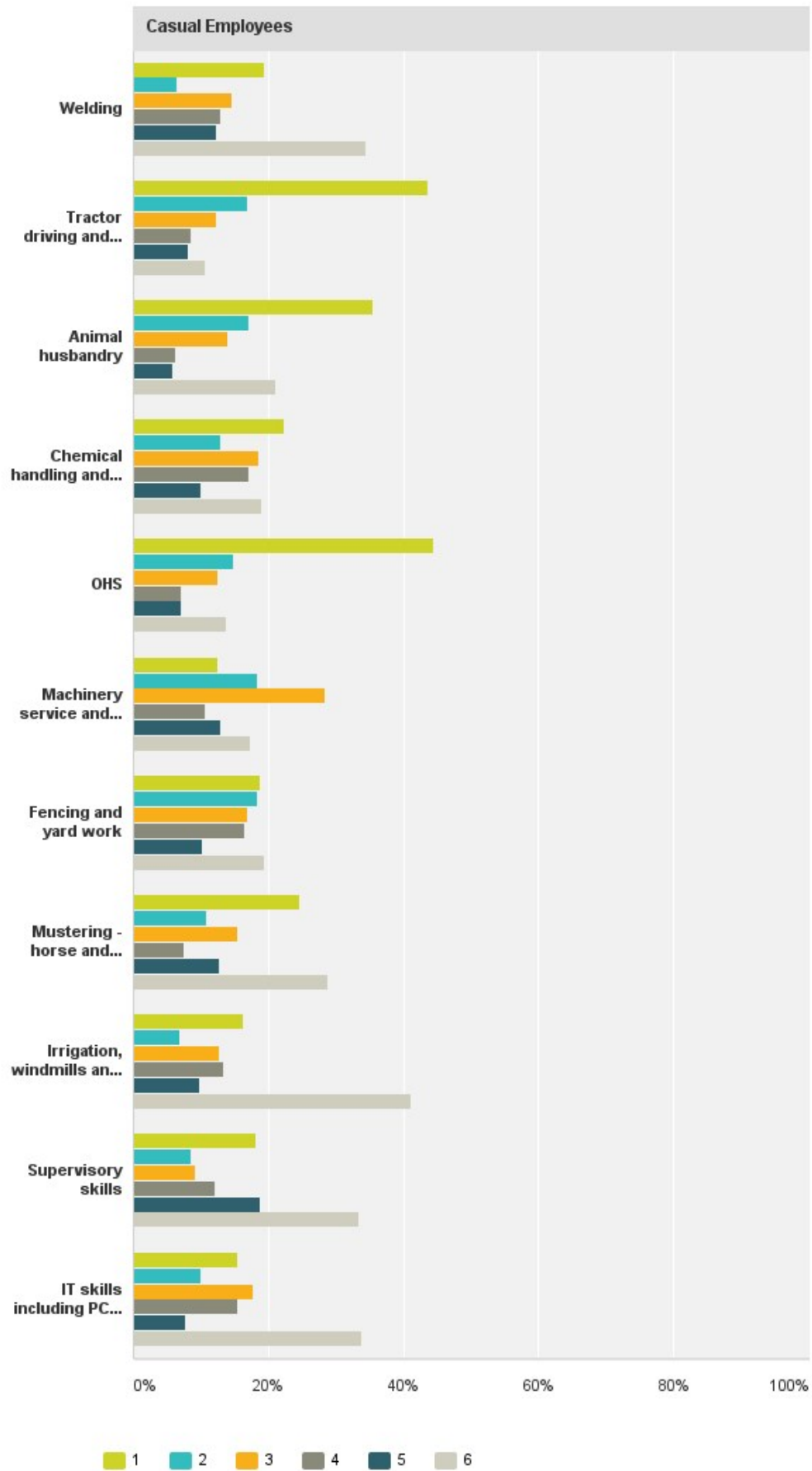
Answer Choices	Responses
Cannot afford to employ additional personnel	45.76% 221
Shortage of skilled and committed labour	50.52% 244
Highly competitive labour markets	12.63% 61
Small and inadequate applicant choice	22.77% 110
Government regulations including OHS requirements	33.54% 162
Other	6.21% 30
No impediments	4.97% 24
Total Respondents: 483	

Q26 Please rate in order of importance the following skills for full-time, part-time and casual employees (from 1 through to 6). With 1 being most important and 6 being least.

Answered: 454 Skipped: 47







APPENDIX A - Agriculture Workforce - Farm Sector Employer Survey Results

Full-Time Employees							
	1	2	3	4	5	6	Total
Welding	21.05% 56	16.92% 45	22.93% 61	13.91% 37	10.53% 28	14.66% 39	266
Tractor driving and heavy machinery	48.92% 159	13.23% 43	14.77% 48	7.08% 23	5.85% 19	10.15% 33	325
Animal husbandry	45.98% 143	16.40% 51	8.68% 27	6.43% 20	5.14% 16	17.36% 54	311
Chemical handling and application	35.95% 110	16.34% 50	18.63% 57	8.82% 27	7.84% 24	12.42% 38	306
OHS	38.26% 114	20.47% 61	13.42% 40	6.38% 19	7.38% 22	14.09% 42	298
Machinery service and repairs	23.95% 74	23.62% 73	19.42% 60	11.00% 34	10.36% 32	11.65% 36	309
Fencing and yard work	19.57% 54	18.84% 52	22.10% 61	11.23% 31	12.68% 35	15.58% 43	276
Mustering - horse and motorbike	30.74% 75	12.30% 30	10.25% 25	9.43% 23	6.15% 15	31.15% 76	244
Irrigation, windmills and bores	23.90% 60	17.13% 43	15.54% 39	7.97% 20	10.76% 27	24.70% 62	251
Supervisory skills	28.52% 81	21.83% 62	18.31% 52	10.56% 30	10.21% 29	10.56% 30	284
IT skills including PCs, GPS, NLIS	18.80% 50	25.56% 68	19.17% 51	9.77% 26	13.53% 36	13.16% 35	266
Part-time Employees							
	1	2	3	4	5	6	Total
Welding	17.22% 26	11.26% 17	20.53% 31	17.88% 27	13.25% 20	19.87% 30	151
Tractor driving and heavy machinery	42.70% 79	22.16% 41	15.14% 28	5.41% 10	6.49% 12	8.11% 15	185
Animal husbandry	38.76% 69	16.85% 30	14.04% 25	5.62% 10	8.43% 15	16.29% 29	178
Chemical handling and application	27.65% 47	14.12% 24	23.53% 40	11.18% 19	8.24% 14	15.29% 26	170
OHS	38.32% 64	17.96% 30	16.77% 28	4.19% 7	10.78% 18	11.98% 20	167
Machinery service and repairs	21.30% 36	23.67% 40	21.89% 37	13.02% 22	7.69% 13	12.43% 21	169
Fencing and yard work	21.12% 34	16.77% 27	26.09% 42	11.80% 19	8.70% 14	15.53% 25	161
Mustering - horse and motorbike	30.22% 42	11.51% 16	14.39% 20	7.91% 11	8.63% 12	27.34% 38	139

Irrigation, windmills and bores	19.01% 27	13.38% 19	16.90% 24	14.79% 21	8.45% 12	27.46% 39	142
Supervisory skills	17.02% 24	16.31% 23	19.86% 28	13.48% 19	14.89% 21	18.44% 26	141
IT skills including PCs, GPS, NLIS	14.79% 21	12.68% 18	21.83% 31	14.79% 21	11.27% 16	24.65% 35	142
Casual Employees							
	1	2	3	4	5	6	Total
Welding	19.35% 36	6.45% 12	14.52% 27	12.90% 24	12.37% 23	34.41% 64	186
Tractor driving and heavy machinery	43.64% 103	16.95% 40	12.29% 29	8.47% 20	8.05% 19	10.59% 25	236
Animal husbandry	35.59% 79	17.12% 38	13.96% 31	6.31% 14	5.86% 13	21.17% 47	222
Chemical handling and application	22.38% 47	12.86% 27	18.57% 39	17.14% 36	10% 21	19.05% 40	210
OHS	44.50% 93	14.83% 31	12.44% 26	7.18% 15	7.18% 15	13.88% 29	209
Machinery service and repairs	12.50% 26	18.27% 38	28.37% 59	10.58% 22	12.98% 27	17.31% 36	208
Fencing and yard work	18.84% 39	18.36% 38	16.91% 35	16.43% 34	10.14% 21	19.32% 40	207
Mustering - horse and motorbike	24.71% 43	10.92% 19	15.52% 27	7.47% 13	12.64% 22	28.74% 50	174
Irrigation, windmills and bores	16.18% 28	6.94% 12	12.72% 22	13.29% 23	9.83% 17	41.04% 71	173
Supervisory skills	18.18% 30	8.48% 14	9.09% 15	12.12% 20	18.79% 31	33.33% 55	165
IT skills including PCs, GPS, NLIS	15.38% 26	10.06% 17	17.75% 30	15.38% 26	7.69% 13	33.73% 57	169