

South Australian Wine Industry Employment Strategy Project

Employee Research Report

AUGUST 2007

The SA Wine Industry Employment Strategy project was funded through the Department of Further Education, Employment, Science and Technology, South Australia Works program which is an initiative of the Government of South Australia in partnership with the Food, Tourism & Hospitality Industry Skills Advisory Council SA Inc.

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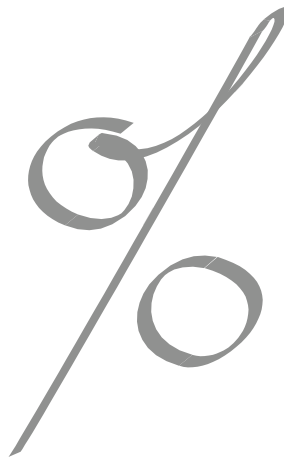


SouthAustraliaWorks
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WINE & GRAPE INDUSTRY EMPLOYEE SURVEY

RESEARCH REPORT PREPARED BY



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INTRODUCTION

The SA Food, Tourism and Hospitality Industry Skills Advisory Council (FTH), with funding from the South Australia Works Workforce Development Fund, is undertaking the development of the South Australian Wine Industry Employment Strategy (SAWIES). The strategy is aimed at ensuring the wine industry in South Australia has the workforce necessary to underpin its long term prosperity, sustainability and growth.

This important industry initiative has the support of the State Government (Department of Further Education, Employment, Science & Technology and Department of Primary Industries and Resources of South Australia), the SA Wine Industry Association, and the Liquor, Hospitality and Miscellaneous Union SA Branch.

A key component of the SAWIES Project is a survey of employees to identify needs and concerns.

A parallel survey of employers was carried out at approximately the same time.

A questionnaire was designed by the Project Manager with assistance from DFEEST and industry representatives on the project steering committee to address:

- wine and grape employee demographics
- recruitment, turnover and retention
- training and skills development
- workplace entitlements/conditions.

Employee questionnaires were distributed via small and large employers and regional bodies.

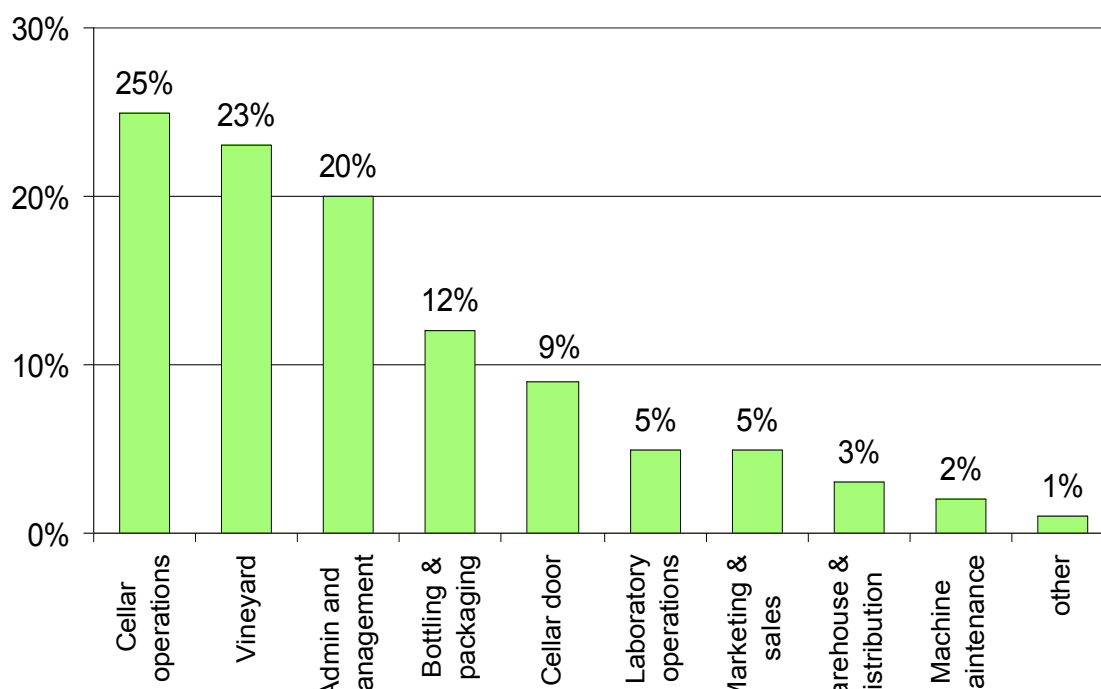
306 completed survey forms were returned.

Truscott Research was commissioned to undertake the analysis and reporting for this study. We also had some input into the questionnaire design.

KEY FINDINGS

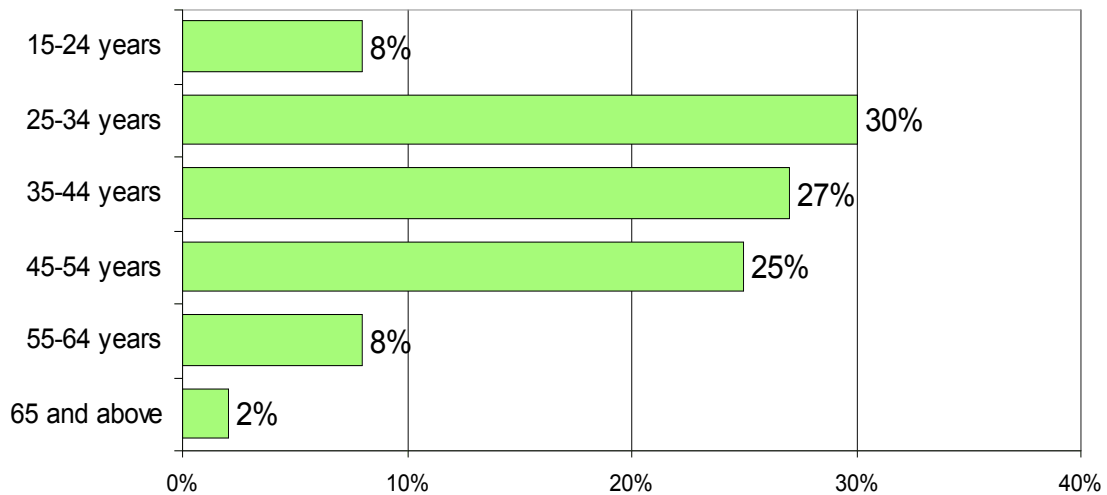
- 306 wine and grape industry employees participated in this survey, with a good geographical spread.
- Cellar operations, vineyard and administration/management employees were the largest groups with between 20% and 25% of the sample working in each area.

DISTRIBUTION BY WORK FAMILIES

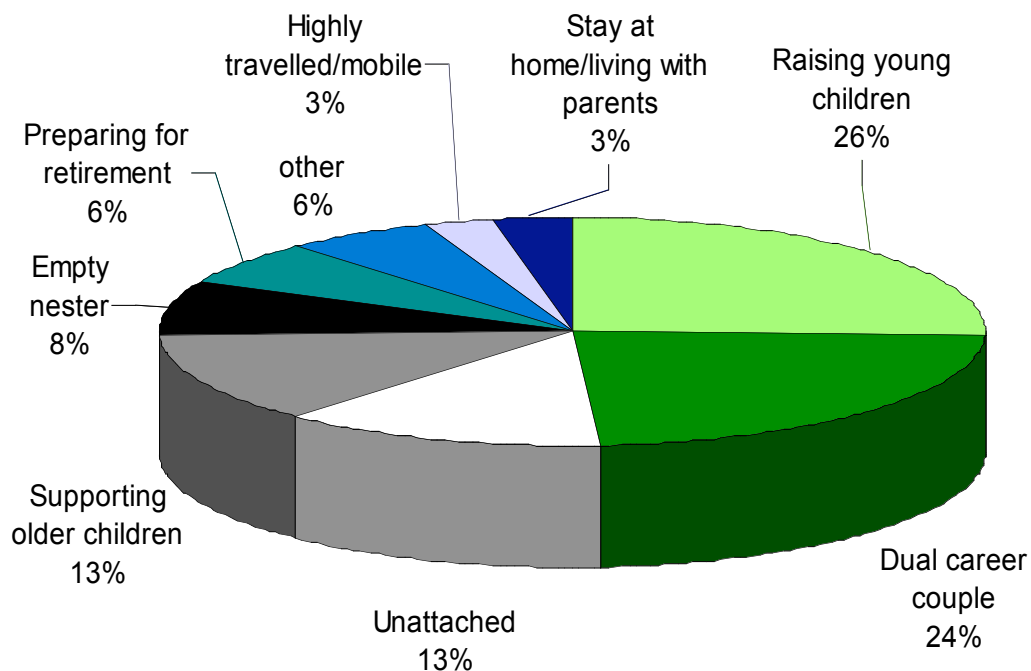


- The majority of wine and grape industry employees who completed the survey were full-time employees working at least 30 hours a week (91%). Almost three quarters (71%) claimed to work more than 38 hours a week. A similar proportion (78%) were full-time permanent and a further 9% were full-time casuals.

- 27% of survey respondents were new to the industry, having worked in wine and grapes for less than five years. 30% had worked in the industry for five to nine years and 32% for ten to nineteen years. Only 10% had worked in the industry at least twenty years.
- 44% have had only one employer in the industry.
- 62% of respondents were males and the age distribution was as follows:



- The life stage distribution of the sample is detailed below:



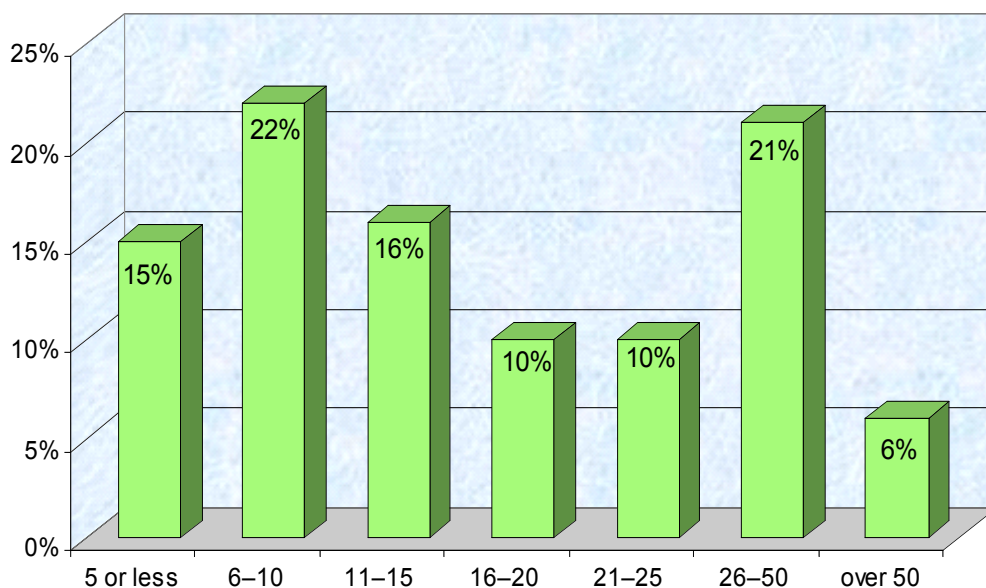
- 7% identify with any ethnic/cultural group.

- One in three considered any of the following to be barriers to employment:

■ Distance to work too far	11%
■ Lack of public transport	10%
■ Affordable housing	6%
■ Accessing child care	5%
■ other	4%

- When specifically asked about travel to work, 37% travel no more than 10 kilometres, with 27% travelling more than 25 km.

DISTANCE TO WORK - kilometres



- The most popular anticipated retirement age was 56-60 (34%), followed closely by 61-65 (28%).
- Respondents were asked to indicate the circumstances under which they would still want to work when they reached retirement age.

Popular responses were part time work / flexible hours (40%), if I needed the money (21%) and if work was still interesting (19%).

- Half (50%) of all respondents intended to be in the same job in five years' time.
- Another third (30%) intended to be in a different position but still within the wine and grape industry.
- Respondents were asked to think about their current job and indicate which skills were most important to job success.
- The most prevalent responses were technical skills eg pruning, machine work, wine making (21%), customer service (21%) and communication (18%).
- Other relatively popular responses were time management (14%), knowledge of product/region/work area (14%), business skills eg financial, planning, negotiating (12%), people management / supervising (11%), attention to detail / concentration / accuracy (10%) and multi-tasking / flexibility (10%).
- Likes and dislikes about working in the wine and grape industry were as follows:

LIKES	DISLIKES
People in industry/friendly (15%)	Weather (13%)
Variety of jobs/tasks (14%)	Long hours at vintage (12%)
Wine/passion for wine (13%)	Attitude -superior, pretentious (9%)
Interesting/exciting /dynamic (11%)	Money (7%)
Challenging work (10%)	
Working outside (10%)	

- Most frequently nominated factors in deciding to leave an employer were:
 - Unfriendly workplace 25%
 - Wages not high enough 23%
 - Limited career path 18%
 - Working hours not suited 8%

■ Common benefits were:

- | | |
|--------------------------------------|-----|
| ▪ Time off for personal matters | 65% |
| ▪ Support for education and training | 62% |

■ Followed by:

- | | |
|-------------------------------|-----|
| ▪ Paying out accrued holidays | 29% |
| ▪ Salary packaging | 28% |

■ Widely held perceptions of the workplace were as follows:

- | | |
|----------------------------------|-----|
| ▪ Friendly work environment | 73% |
| ▪ Provide opportunities to learn | 53% |
| ▪ Pay staff well | 45% |
| ▪ Provide flexible working | 40% |

■ Perceptions about the extent of control employees have over their work were mixed:

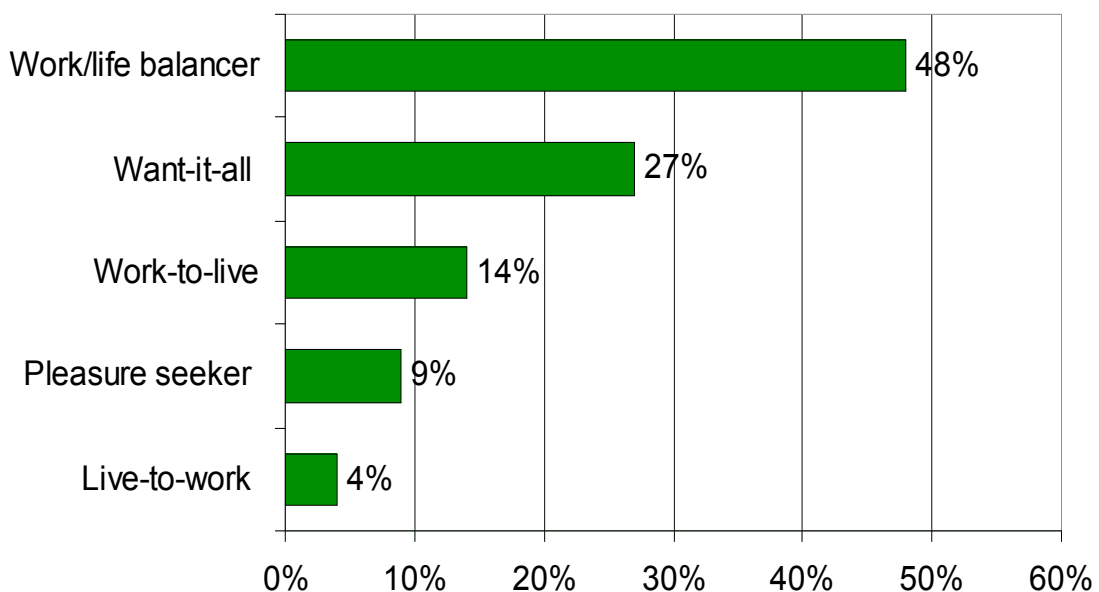
- | | |
|--|-----|
| ▪ Most people have a lot of control | 39% |
| ▪ Most people have a little control | 36% |
| ▪ A few people have a lot of control | 19% |
| ▪ Effectively, individuals have no control | 5% |

■ Employment conditions most often cited as important were:

- | | |
|--------------------------------|-----|
| ▪ Access to education/training | 50% |
| ▪ Remuneration packages | 49% |
| ▪ Family friendly policies | 46% |
| ▪ Recognition/reward programs | 41% |
| ▪ Flexible working hours | 39% |

- Most workers surveyed have either tertiary (26%) or post secondary (31%) qualifications.
- 67% of respondents named qualifications specific to the wine industry and 46% named qualifications which they regarded as not being specific to the industry.
- 65% indicated that they had undertaken training in the previous 2 years. This was almost always employer – sponsored (92%) and provided during work hours (85%).
- However, more than half (56%) indicated they were willing to contribute to the cost of future training.
- Work was viewed as follows:

ATTITUDE TO WORK



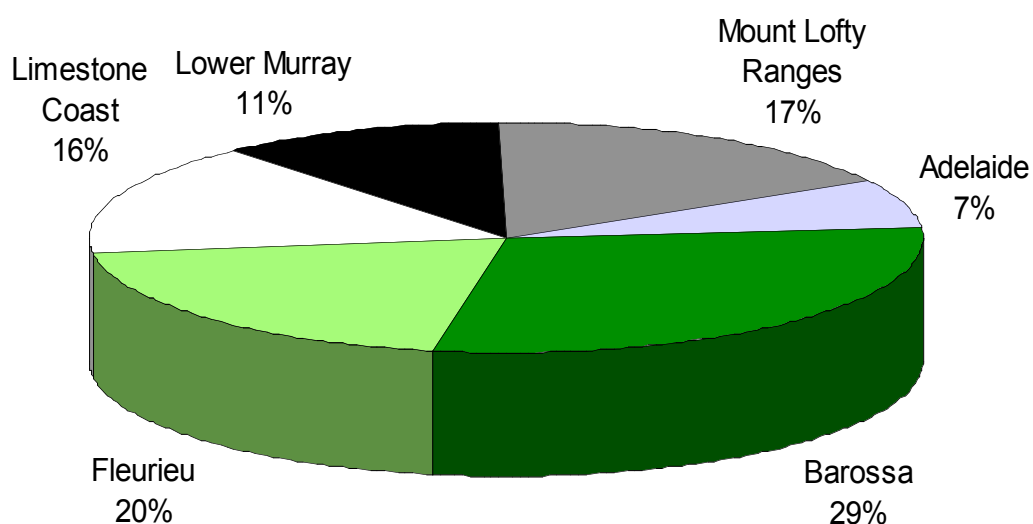
- One third (10%) of respondents rated their overall employee morale as excellent. A further 50% rated morale generally good and 31% OK.
- 9% of all respondents felt morale was low.

SAMPLE CHARACTERISTICS

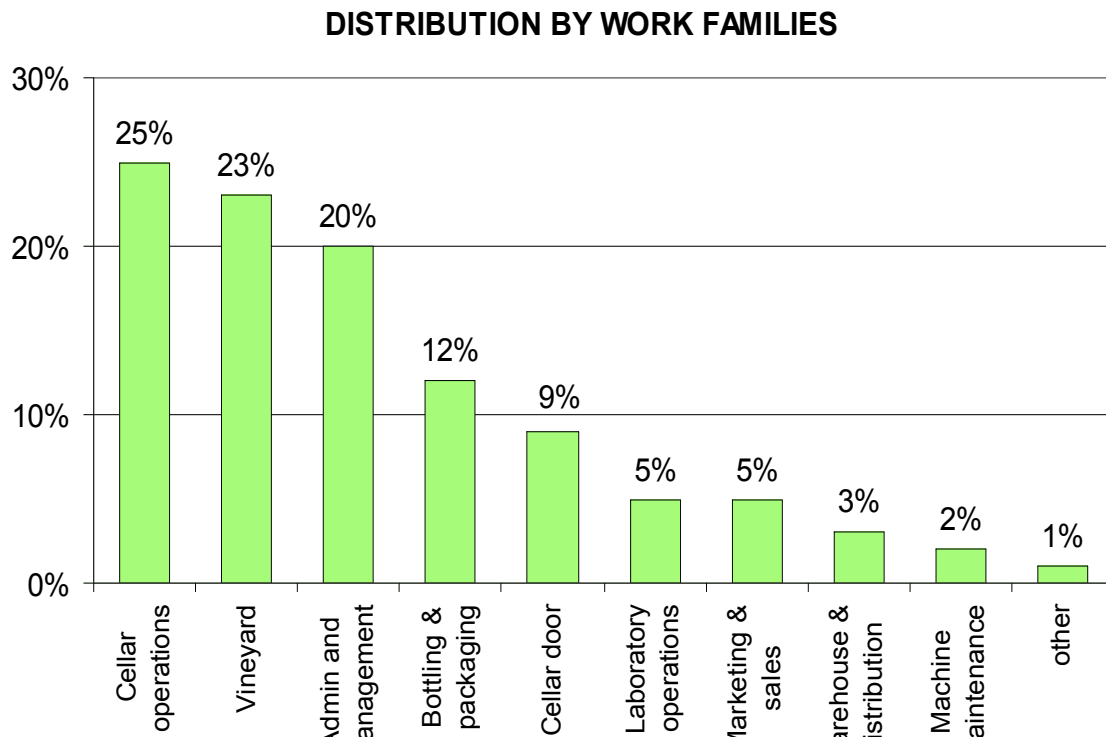
A total of 306 wine and grape industry employees participated in the survey. Survey forms were distributed via those employers who had agreed during the small employer survey. Large employers also participated in this, as did industry networks.

The geographic spread of the sample is shown in the chart below.

DISTRIBUTION BY REGION



Cellar operations, vineyard and administration / management employees were the largest groups with between 20% and 25% of the sample working in each area. Some employees listed more than one response if they had more than one position (e.g. cellar door sales and vineyard worker) however this was rare.



Employees were asked to indicate their job title. These are reproduced below.

Cellar operations

- Cellar hand (37 out of 78 employees in this job family)
- Winemaker (9 employees)
- Cellar operator (5)
- Cellar supervisor (5)
- Assistant winemaker (3)
- Senior winemaker (2)
- Cellar manager (2)

Other cellar operations employees listed were: barrel supervisor, cellar coordinator, cellar employee, distiller-boiler attendant and operations supervisor.

Vineyard employees

- Vineyard hand (15 out of 71 employees)
- Vineyard manager (9 employees)
- Vineyard operator (6)
- Vineyard supervisor (5)
- Contract machine operator (2)
- Viticulturalist (2)
- Vineyard technical officer (2)

Other vineyard employees listed were: viticultural worker, grower liaison officer, irrigation assistant, irrigation manger, key account manager – viticulture, maintenance manager, vineyard team leader, assistant viticulturalist, vineyard assistant, vineyard employee, vineyard overseer, vineyard worker, nursery operator and workshop manager.

Administration and management

- Admin manager (4 out of 60 employees)
- Accountant (2 employees)
- Accounts payable officer (2)
- Admin assistant (2)
- Personal assistant (2)
- Cellar manager (2)
- Export logistics coordinator (2)

Other admin/management employees listed were: accounts and admin officer, accounts officer, administration, administration officer, archivist, assistant accountant, CEO, commercial manager, contract services manager, export packaged coordinator, finance, production & logistics manager, financial controller, general manager, group accounting & taxation manager, human resource co-ordinator, human resources manager, marketing manager, office administrator, office manager, office secretary, packaging assistant, production officer, public relations, quality assurance manager, quality, health and safety coordinator, ranger ecologist, regional admin officer, secretary, senior accounts officer, senior administrator, technical manager-viticulture and winery clerk.

Bottling and packaging

- Supervisor (3 out of 36 employees)
- Bottling attendant (3 employees)
- Bottling hall attendant (2)
- Line monkey (2)

Other bottling/packaging employees listed were: bottle line operator, bottling line attendant, bottling manager, bottling staff , bottling/ packaging supervisor, floor manager, label operator, line attendant, line supervisor, machine operator bottling, packaging engineering manager, packaging floor manager, packaging line supervisor, packaging technician and training coordinator.

Cellar door sales

- Cellar door manager (5 out of 27 employees)
- Cellar door sales assistant (4 employees)
- Cellar door assistant (3)
- Cellar door sales (2)
- Cellar door supervisor (2)

Other cellar door sales employees listed were: cellar door personnel, hospitality manager, wine educator and wine sales assistant.

Laboratory operations

- Laboratory technician (7 out of 15 employees)
- Laboratory manager (3 employees)

Other laboratory employees listed were: laboratory assistant, laboratory supervisor and team leader – laboratory.

Marketing and sales

- Sales manager (3 out of 14 employees)

Other marketing/sales employees listed were: export logistics, export manager, mail order manager/marketing, marketing assistant, marketing coordinator, public relations & marketing, ranger ecologist and sales & marketing manager.

Warehouse and distribution

Warehouse employees listed were: dispatch / receival co-ordinator, export packaged coordinator, production & logistics manager and warehouse manager.

Machine maintenance

- Maintenance fitter (2 out of 6 employees)

Other maintenance employees were: apprentice mechanical engineer and mechanic / truck driver.

Other

Other employees were: cook's assistant, food coordinator and food service.

Respondents were also asked to indicate their previous job in industry and their interests/hobbies outside of work. These answers are reproduced in an appendix.

The majority of wine and grape industry employees who completed the survey were full-time employees working at least 30 hours a week.

Hours worked per week

Less than 10	2%
10-19	2%
20-29	6%
30-38	20%
More than 38	71%

Employment status

Full-time permanent	78%
Full-time casual	9%
Part time casual	6%
Part-time permanent	5%
Temporary/seasonal worker	1%
Apprentice/trainee	1%
Employee on fixed term contract	<1%

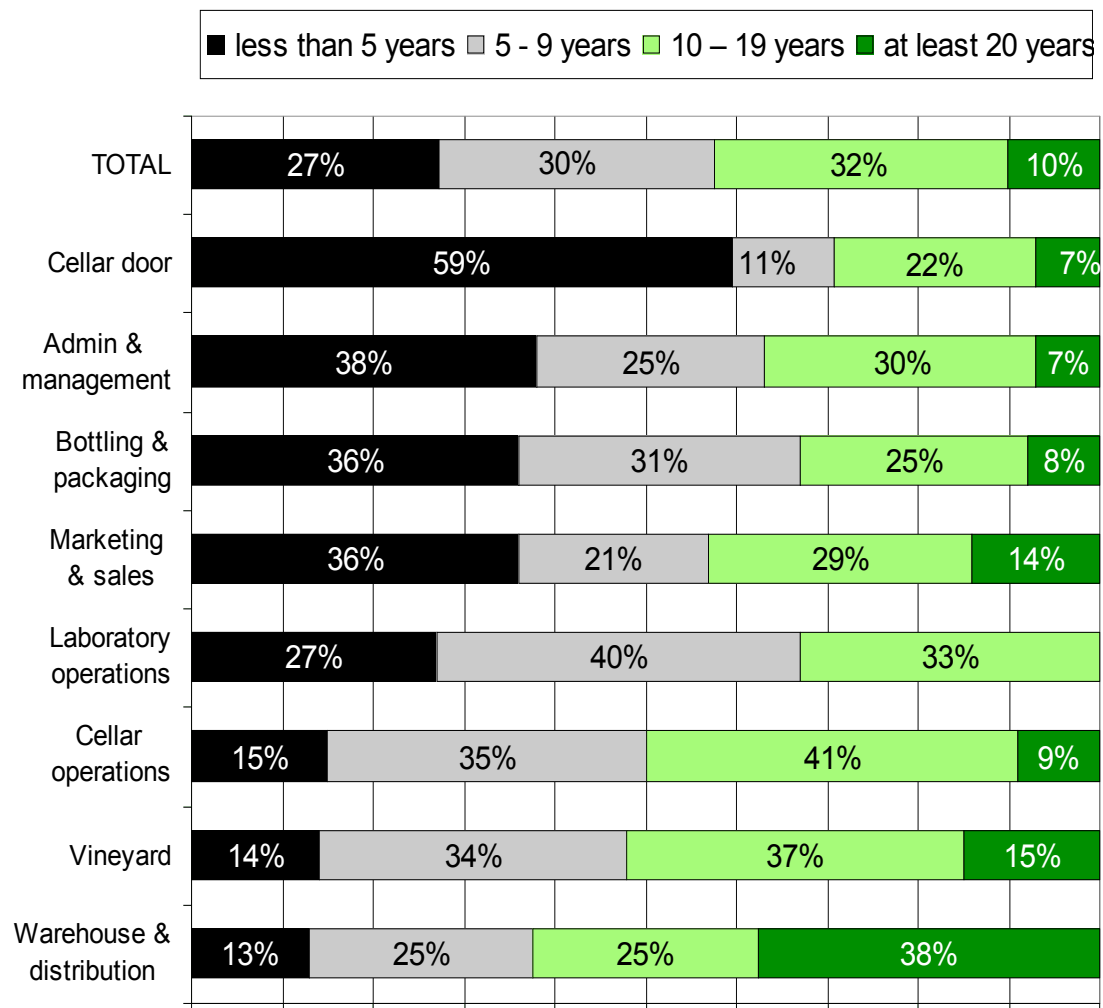
All cellar operations employees and 96% of vineyard employees worked at least 30 hours a week while only 48% of cellar door employees worked at least 30 hours a week.

Cellar operations showed a significantly higher proportion of full-time permanent employees (87%) and administration/management had a significantly higher proportion of part-time permanent employees (12%).

27% of survey respondents were new to the industry, having worked in wine and grapes for less than five years. 30% had worked in the industry for five to nine years and 32% for ten to nineteen years. Only 10% had worked in the industry at least twenty years.

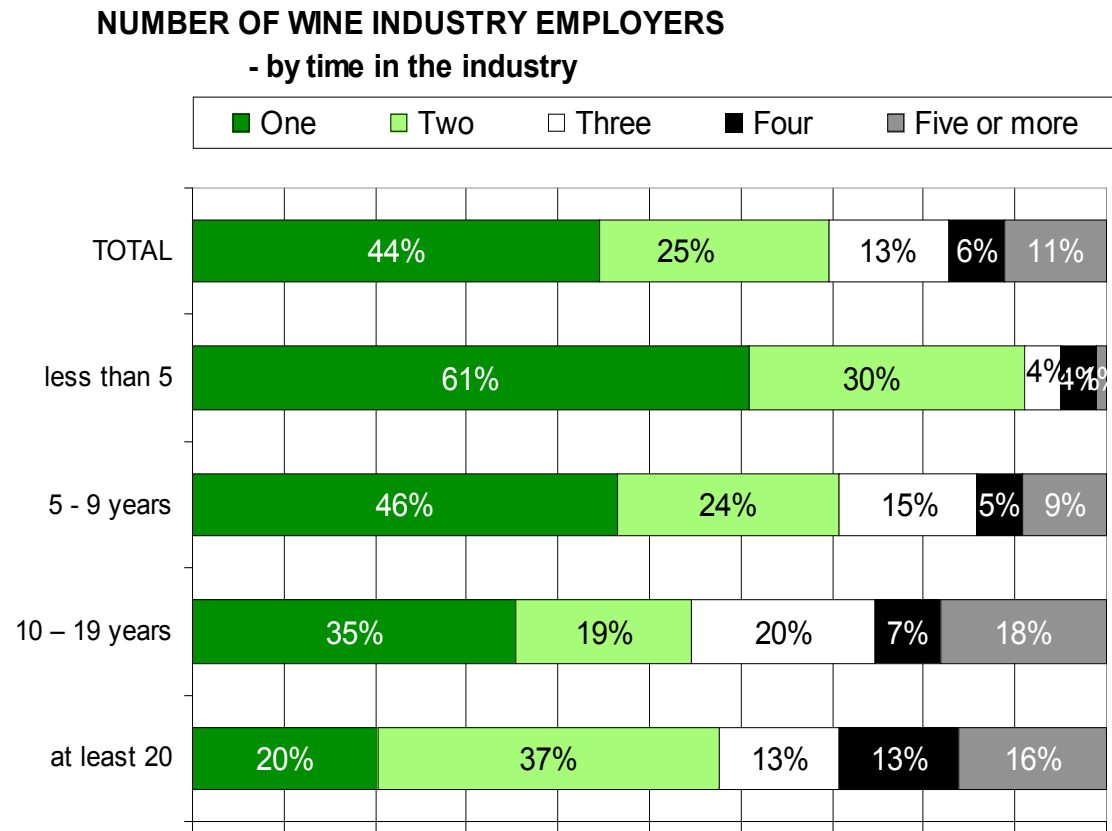
The proportion of respondents new to the industry was small for warehouse/distribution, vineyard and cellar operations job families.

YEARS IN INDUSTRY



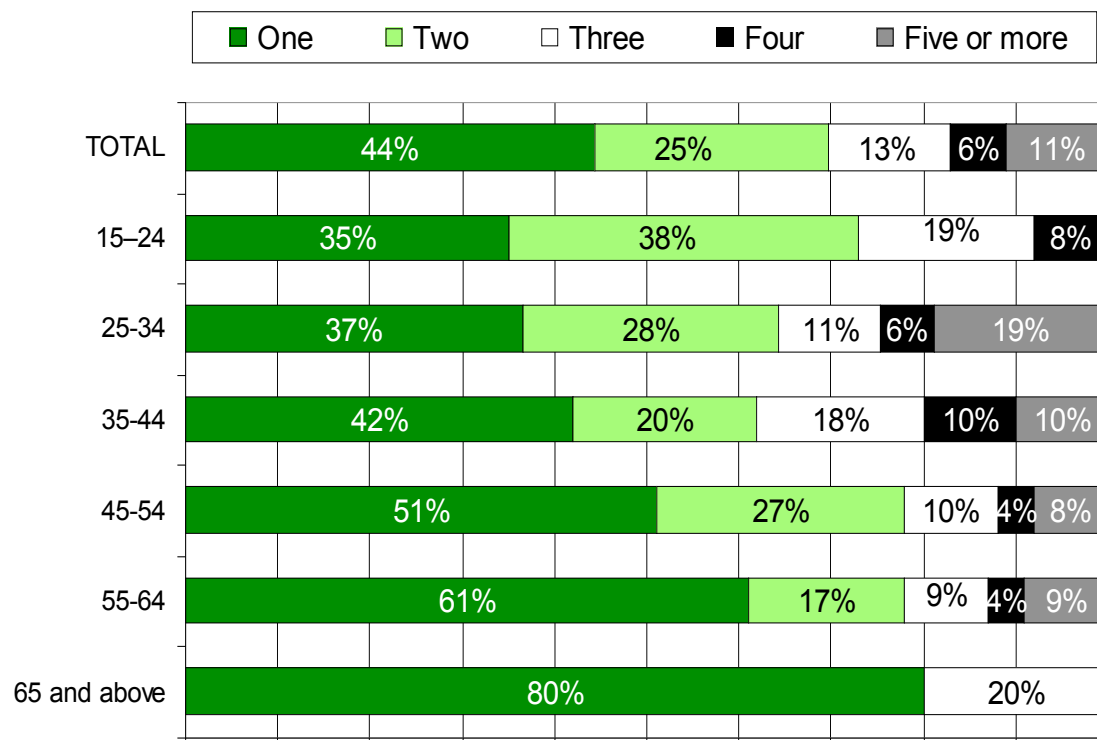
Respondents were also asked to indicate how many wine/grape industry employers they have had in their time in the industry. Results are indicated in the chart below.

As expected, the incidence of having only one employer decreased as time in industry increased. However, while the incidence of having two employers decreased from those in the industry for less than 5 years to those in the industry up to 19 years; the proportion was highest for those in the industry at least 20 years.



The incidence of having had only one employer also correlated with the age of respondents, with 35% of 15-24 year olds having had only one employer compared with 80% of those 65 and above. 25 to 34 year olds had the highest proportion of respondents who had 5 or more employers (19%, including 11% more than 5).

NUMBER OF WINE INDUSTRY EMPLOYERS - by age



The following table details the gender and age profile of respondents. The majority of respondents were aged between 25 and 54, with a male bias.

Gender and age profile:

GENDER	
Females	38%
Males	62%
AGE GROUP	
15-24 years	8%
25-34 years	30%
35-44 years	27%
45-54 years	25%
55-64 years	8%
65 and above	2%

Males were particularly prevalent in the vineyard (82%) and cellar operations (91%) while there was a higher proportion of female respondents in the administration/management job family (65%).

Respondents were also asked to indicate whether they identified with any ethnic or cultural group. The overwhelming majority (93%) responded in the negative.

The specific ethnic/cultural groups nominated were:

- Latin (5 respondents)
- European (3 respondents)
- New Zealand/Kiwi (3 respondents)
- English (2 respondents)
- Italian (2 respondents)

Other groups mentioned were: Aboriginal Australian, Afghans, Anglo Celtic, White Anglo Saxon, Croatian, Dutch, Hungarian, Irish Australian, old & new Australians, alternative lifestylers, contract labour hire groups, raver and work sometimes with Asian groups.

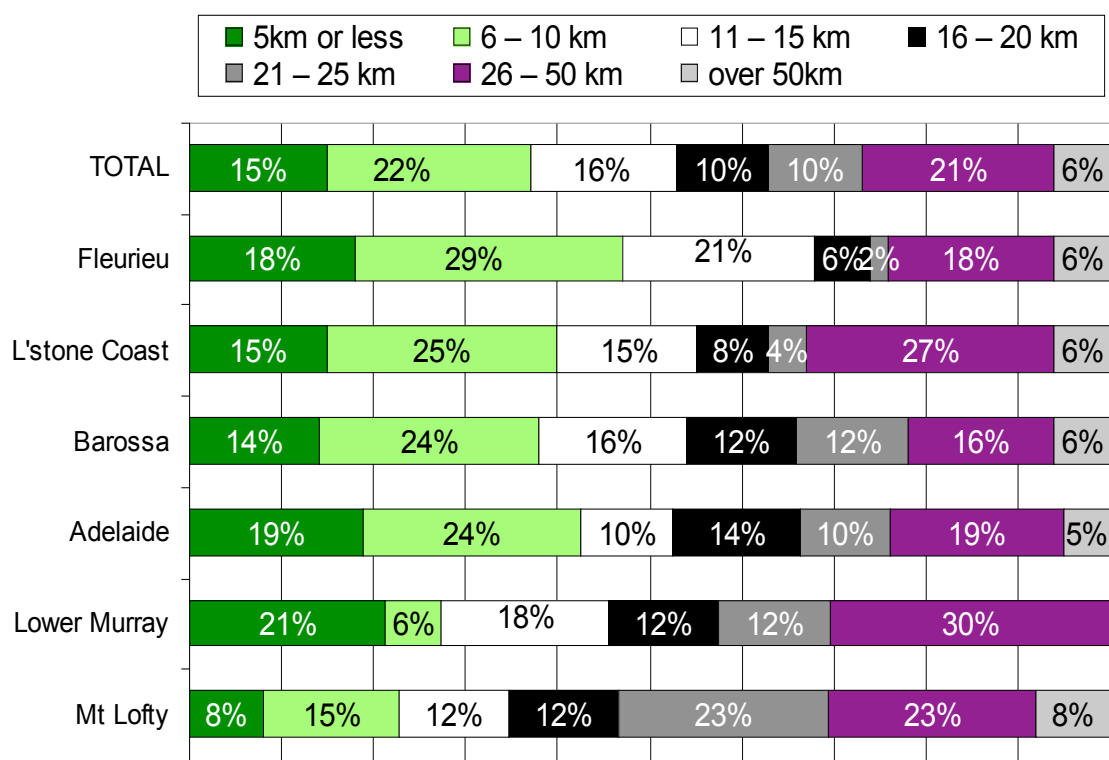
The most frequent life stages for respondents were raising young children (26%) and dual career couple (24%). Also relatively common were unattached (13%) and supporting older children (13%).

Current life stage

Raising young children	26%
Dual career couple	24%
Unattached	13%
Supporting older children	13%
Empty nester	8%
Preparing for retirement	6%
Highly travelled/mobile	3%
Stay at home/living with parents	3%
Other	6%

The majority of respondents have to travel no more than 25 km to work. Travel distances were slightly higher for those from the Mount Lofty region where 23% of respondents had to travel from 21 to 25 km to work, 31% had to travel even further. In contrast, only 2% of respondents from the Fleurieu had to travel 21-25 km and only 24% more than this.

DISTANCE TO WORK - by region



COMMENTARY

Wine and grape industry likes

All respondents were asked to state what they like about working in the wine and grape industry. Individual responses have been categorised for analysis.

Responses were diverse. Themes most frequently mentioned were: the **people** in the industry (15%), the **variety** in jobs / tasks (14%), having a passion for the **product** (13%), **interesting** / exciting / dynamic industry (11%), **challenges** of the work (10%) and working **outside** (10%).

Other minor responses are also listed in the table overleaf.

What do you like about working in the wine and grape industry?

Multiple response, blanks excluded [n=264]

People in industry – co-workers / friendly	15%
Variety of jobs/tasks	14%
Wine / passion for wine	13%
Interesting / exciting / dynamic	11%
Challenging work	10%
Working outside	10%
Growing industry / Work always available	7%
Money	6%
Constantly changing e.g. seasonal and technical	5%
Always learning	4%
Process of wine making	4%
Rural setting / fresh air	4%
Close to home	3%
Meeting people	3%
Diversity	3%
Cheap wine	3%
Lifestyle	3%
It's a job	2%
Everything	2%
Flexibility	2%
Good working conditions / Relaxed atmosphere	2%
Other*	14%

*Other includes seasonal nature of work, travel opportunities, working with people, clean work, promoting region, stable, rewarding and making *quality* wine.

Wine and grape industry dislikes

Respondents were also asked to indicate what they don't like about the industry. As with the previous question, responses were diverse. The most frequently mentioned dislikes were **weather** issues (e.g. too hot or cold, 13%) and the long hours required at **vintage** (12%).

Other minor responses are also listed in the table below.

What don't you like about working in the wine and grape industry?

Multiple response, blanks excluded [n=232]

Weather [e.g. too hot or too cold]	13%
Long hours at vintage	12%
Attitudes e.g. superior, pretentious	9%
Money	7%
Industry uncertainties / job insecurity	5%
Hours	4%
Lack of communication/good management	3%
Shift work	3%
Working nights / weekends	2%
Staff who don't care about their work	2%
Grape prices	2%
Limited career growth	2%
Repetitive / meaningless work	2%
Reliance on weather	2%
Other*	25%
Nothing	12%

*Other includes industry too competitive, not enough hours, outside work, rural living, no recognition, takeovers, taxes and the duration of vintage.



Factors that influence leaving an employer

Respondents were asked to indicate which of a list of factors would have the *most* influence over whether they left an employer.

This question was meant to be a single response question. However, as some respondents did circle more than one response, we have included up to three factors. If a respondent circled more than three factors the answer was not included as it was felt this would not adequately reflect factors with the *most* influence. For this reason the answer is based on 293 responses rather than 306.

Unfriendly workplace and **wages not high enough** were the most frequently mentioned factors which influence a respondent to leave an employer (25% and 24% respectively).

A relatively high proportion of respondents were influenced by **limited career paths** (18%), **lack of challenging work** (14%) or **not enough recognition** (12%).

A full list of responses appears in the table overleaf. This table also details responses for individual job families. Differences between job families are not statistically significant.

There were statistically significant differences between other sub-groups and these are discussed after the table.

Which of these factors would have the most influence over whether you left an employer? (Inc. multiple responses)

[n=293]	TOTAL	VY	CO	CD	AM	Lab	MS	WD	BP
Unfriendly workplace	25%	28%	25%	19%	27%	36%	7%	38%	16%
Wages not high enough	24%	28%	29%	15%	16%	14%	7%	25%	31%
Limited career path	18%	22%	16%	15%	23%	21%	21%	13%	19%
Lack of challenging work	14%	10%	11%	22%	20%	7%	36%	38%	19%
Not enough recognition	12%	7%	16%	7%	14%	14%	7%	13%	9%
Working hours not suited	8%	4%	5%	22%	7%	7%	0%	0%	16%
Wanted better conditions	4%	6%	4%	4%	0%	14%	0%	0%	3%
Commuting time too long	3%	4%	4%	4%	2%	0%	7%	0%	3%
Other*	6%	6%	4%	15%	5%	0%	21%	0%	6%

*Other includes: redundancy, retirement and takeovers.

Full-time permanent employees were more concerned with **limited career paths** (21%) than other employees (6%). Other employees would be more likely to leave because **working hours did not suit** (22%, compared with 4% of FT-permanent).

Employees from the Fleurieu were the most likely to leave because of **limited career paths** (27%).

Males were more concerned with **wages not being high enough** (29% compared with 14% of females) and less concerned with **working hours not suiting** (5% compared with 14% of females).

In terms of age, **limited career path** was more of an issue for younger respondents (27% of 15-34, 17% of 35-44 and 10% of 45+) and **unfriendly workplace** was more of an issue for older respondents (16% of 15-34, 24% of 35-44 and 35% of 45+).

Entitlements and benefits currently offered

95% of respondents had been offered at least one of the entitlements/benefit listed on the survey form.

Common benefits were **time off for personal matters** (65%) and **support for education/training** (62%).

Paying out accrued holidays and **salary packaging** were also relatively common (29% and 28%).


All responses are listed in the table overleaf.

The table also shows that **salary packaging** and **annualised salaries** were more common for respondents in the administration and management job family (50% and 29%) and a **compressed work week/banking of hours** was more common for vineyard employees (26%) than for those working in other job families.

Responses that are significantly higher or lower for any particular job family at the 95% confidence level [the standard for market/social research] are highlighted in bold type in this table and all subsequent tables in this report. Sample sizes for the following job families were too small for this type of statistical testing to apply: - laboratory, marketing/sales and warehouse/distribution.

Which of the following entitlements/benefits does your current employer offer to you: (Inc. multiple responses)

[n=293]	TOTAL	VY	CO	CD	AM	Lab	MS	WD	BP
Time off for personal matters	65%	68%	57%	64%	76%	80%	43%	29%	71%
Support for education/training	62%	68%	63%	68%	66%	67%	43%	43%	49%
Pay out accrued holidays	29%	35%	29%	20%	28%	33%	21%	0%	23%
Salary packaging	28%	26%	23%	20%	50%	20%	50%	29%	9%
Bonus, profit sharing etc	19%	24%	16%	20%	22%	13%	36%	14%	6%
Annualised salary	18%	20%	16%	16%	29%	0%	0%	14%	17%
Compressed work week/banking of hours	16%	26%	13%	12%	12%	20%	0%	0%	20%
Policy of allowing employees to volunteer	14%	15%	13%	20%	12%	13%	0%	14%	11%
Paid maternity leave	11%	11%	9%	8%	16%	13%	7%	0%	9%
Performance related pay	11%	12%	11%	20%	10%	7%	21%	14%	0%
Formal system of job rotation	9%	14%	11%	8%	2%	0%	0%	0%	9%
Paid paternity leave	7%	11%	5%	8%	9%	0%	0%	0%	3%
Pay accrued sick leave	5%	6%	5%	0%	5%	7%	0%	0%	3%
None of these	5%	0%	8%	16%	2%	0%	14%	0%	0%



Males were more likely to report a formal system of **job rotation** (13%) compared with females (3%).

35-44 year olds had the highest proportion of **compressed work weeks** (25%) and those 45 and over had higher proportions of allowing **volunteer activities** (20%) and **job rotation**.

Salary packaging, paying out accrued holidays and performance related pay were all more common for full-time permanent employees (34%, 32% and 13% compared with 8%, 16% and 3% of other employees).

Salary packaging and profit sharing/share ownership schemes were both more common for respondents who have been in the industry for at least ten years (35% and 26% respectively). The incidence of having policies which **allow employees to volunteer** also increased with the number of years in industry (5% of those in the industry for less than 5 years, 12% for those in the industry for 5-9 years and 21% for those 10 or more years).

There were also several regional variations.

- **Lower Murray** respondents had higher proportions offered **annualised salary** (31%) and **performance related pay** (25%).
- **Limestone Coast** respondents had higher proportions offered **bonus, profit sharing scheme or share ownership schemes** (40%) and a **formal system of job rotation** (17%).
- **Fleurieu** respondents had higher proportions paid out **accrued sick leave** (77%), paid out **accrued holidays** (40%) and offered **salary packaging** (40%).
- **Barossa** respondents had higher proportions paid out **accrued sick leave** (74%) and being given **support for education and training courses** (73%).
- **Mount Lofty Ranges** respondents had the highest proportion of having **none** of the listed benefits offered (12%).

Perceptions of employer and workplace

Three quarters of respondents (73%) described their workplace as **friendly**.

Half reported their workplace as providing **opportunities to learn new skills** (53%).

Over one third described their workplace as **paying staff well** (45%), **providing flexible working conditions** (40%) and **recognising staff** for work they do (34%).

One quarter worked in companies which **helped balance work/life** (26%).

One in five had employers who **ensured work had new challenges** (19%).

Only 7% of wine and grape industry employees surveyed had employers who **enabled staff to work from home**.

In the accompanying table [overleaf], work family responses that are significantly different from the aggregate are highlighted in bold type. These were:

- Providing **flexible working conditions**, helping to **balance work/life**, ensuring **work still has new challenges** and enabling staff to **work from home** were all more common for respondents in the **administration & management** job family (53%, 43%, 34% and 21%).
- Providing opportunities to **learn new skills** and **recognising staff** for the work they do were mentioned by those in the **vineyard** (69% and 45%) more frequently than other sub-groups.

Which of these statements are true for your employer /workplace:
(Inc. multiple responses)

[n=302]	TOTAL	VY	CO	CD	AM	Lab	MS	WD	BP
Friendly work environment	73%	75%	68%	77%	81%	67%	64%	63%	69%
Provide opportunities to learn new skills	53%	69%	44%	62%	48%	40%	50%	25%	47%
Pay staff well	45%	48%	36%	62%	53%	47%	29%	0%	33%
Provide flexible working conditions	40%	45%	29%	58%	53%	20%	43%	13%	31%
Recognise staff for the work they do	34%	45%	26%	42%	43%	27%	57%	13%	17%
Help you balance work/life	26%	27%	17%	58%	43%	0%	21%	13%	14%
Ensure work still has new challenges	19%	20%	13%	35%	34%	7%	29%	38%	3%
Enable staff to work from home	7%	1%	3%	4%	21%	0%	43%	0%	0%
None of these	8%	3%	10%	8%	2%	13%	14%	0%	11%

Respondents who had an employment status other than full-time permanent were more likely to report an employer helping to **balance work/life** (36% compared with 24% of full-time permanent), however none of these employees reported being able to **work from home**.

Fleurieu respondents reported a higher proportion of **friendly work environment** (84%) and **recognising staff for work** (50%). Limestone Coast respondents reported a higher proportion of **pay staff well** (62%) and Lower Murray reported higher proportions of ensuring **work still has new challenges** (34%).



Employee morale

One in ten (10%) respondents rated the employee morale at their workplace as **excellent**.

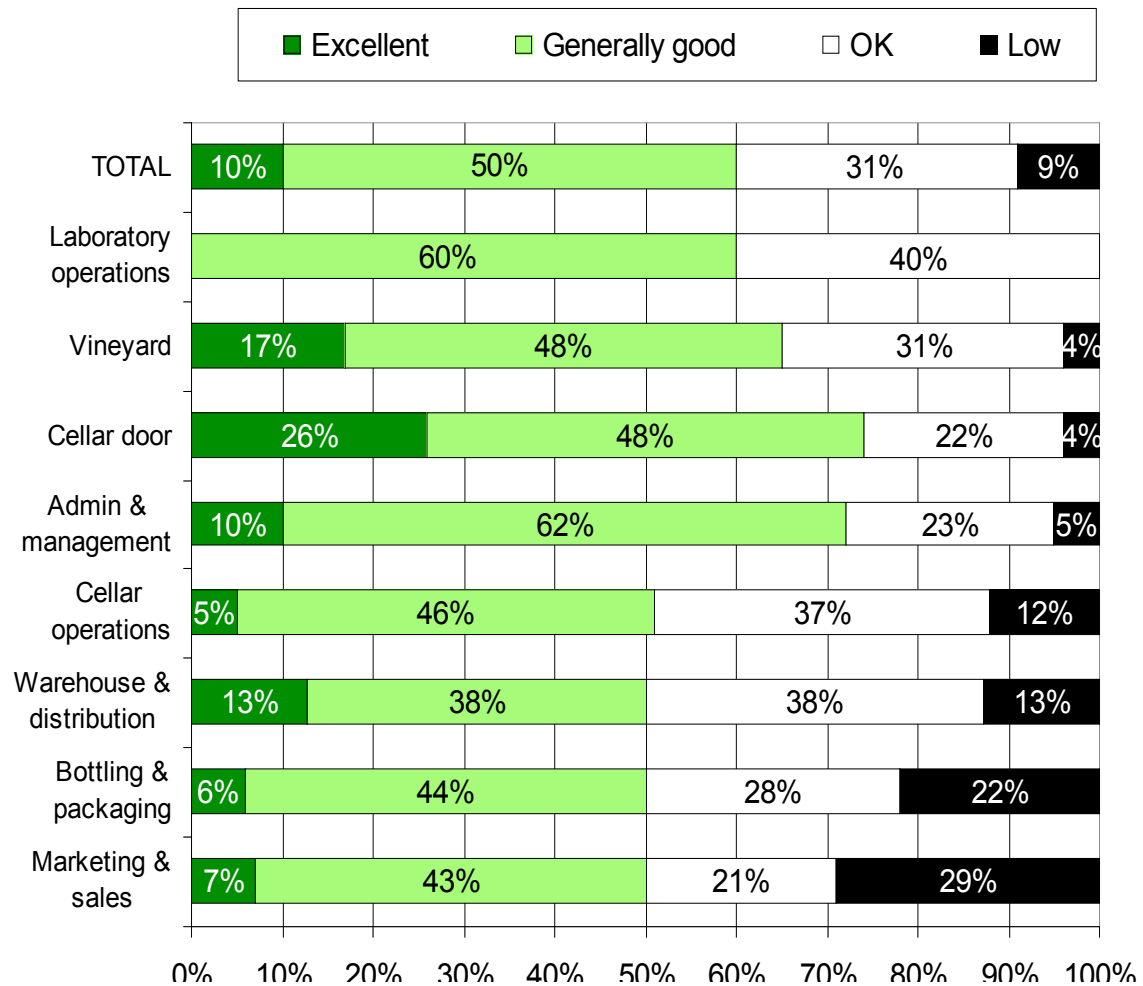
A further 50% rated the morale as **generally good** and 31% **OK**.

Only 9% rated morale as **low**.

As can be seen from the chart overleaf, both bottling/packaging and marketing/sales sub groups have fairly high proportions of **low** morale ratings (22% and 29%).

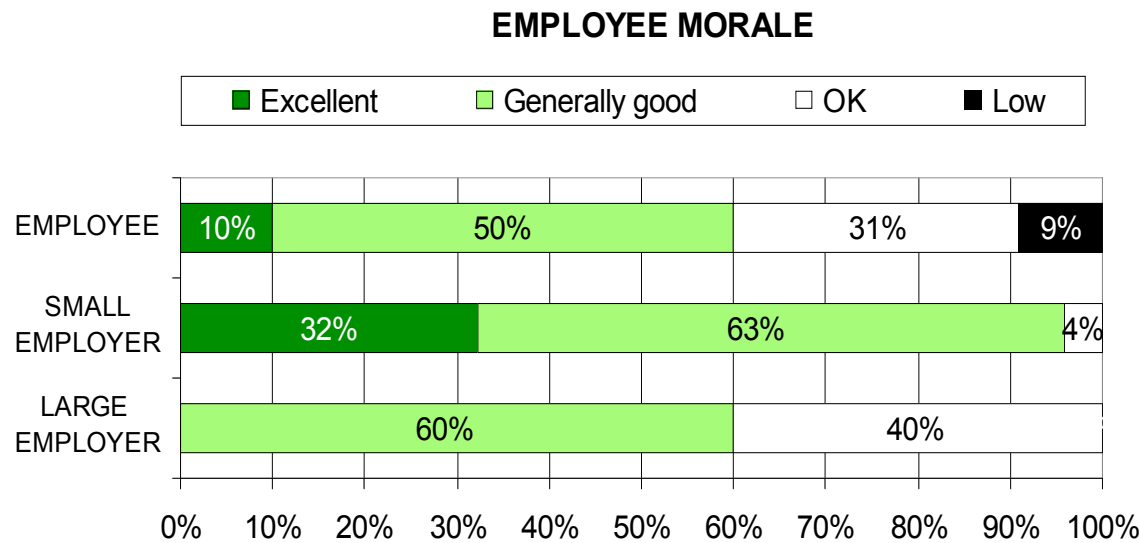
On the other hand cellar door sales, administration/management and vineyard all have relatively high levels of **good** to **excellent** morale.

EMPLOYEE MORALE



This was one question that was asked in the same way across all three surveys.

Employee morale was rated less favourably by employees in the current survey than by employers in the small employer survey. The response pattern for large employers is not dissimilar to that of employees.





Estimated control over work performance

Respondents were asked to indicate the extent to which individual employees at their workplace have control over how they perform their work.

Over a third (39%) of respondents felt **most people** at their workplace **had a lot** of control.

A further 36% felt **most people have a little** control and 19% felt only a **few people have a lot** of control.

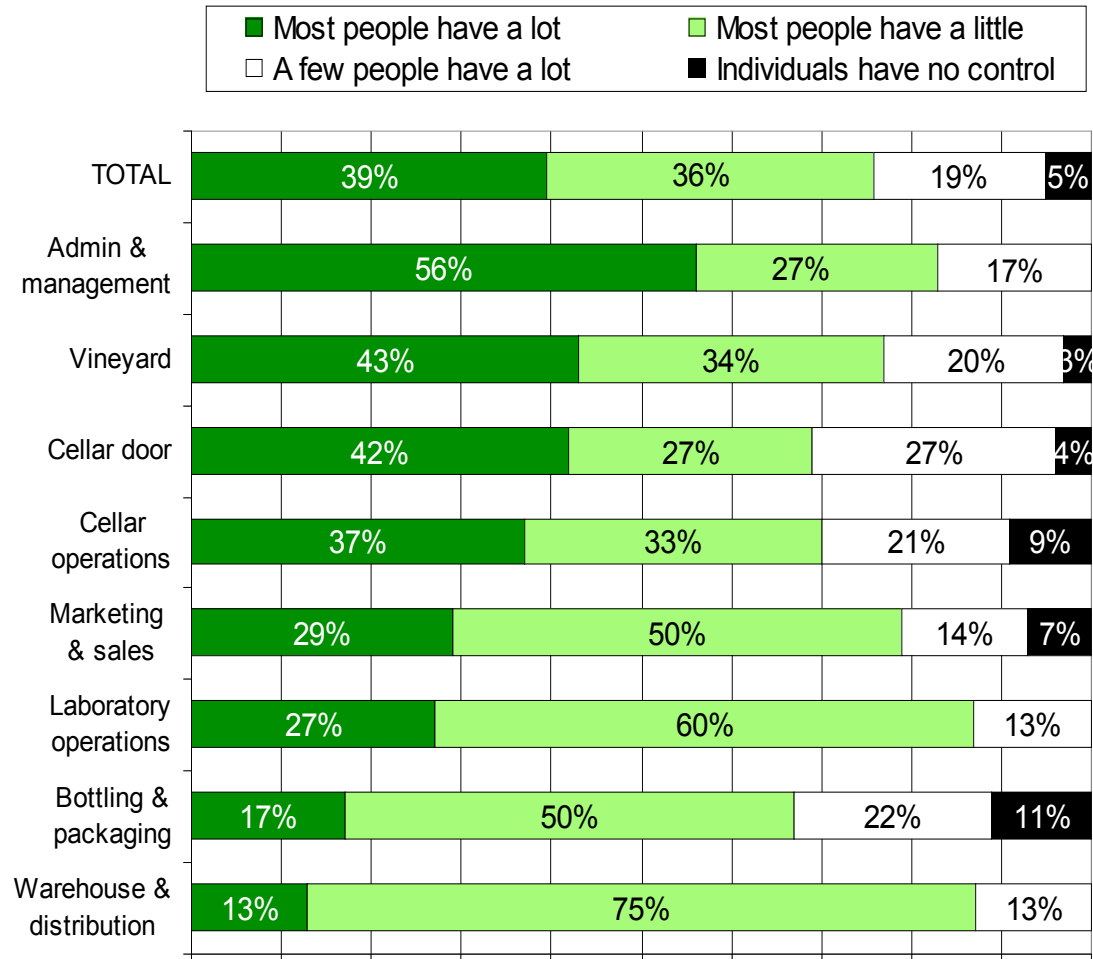
5% felt individuals have **no control**.

It can be seen from the chart overleaf that administration management employees were particularly likely to say **most people have a lot** of control responses (56%). Bottling/packaging respondents and warehouse/distribution were the least likely to say this (17% and 13%).

Further analysis showed that younger respondents had a higher proportion of believing **most people have a lot of control** (47% of 15-34 year olds).

Fleurieu respondents also had a high proportion of **most people have a little control** responses (47%).

CONTROL OVER HOW PERFORM WORK





Perceived importance of selected employment conditions

The employment conditions often selected as being most important to respondents were **access to education** and training (50%), **remuneration packages/entitlements** (49%) and **family friendly** policies and practices (46%).

Recognition/reward programs and **flexible working hours** were also seen as important by a large proportion of respondents (41% and 39%).

Responses in aggregate and segmented by job family are tabled overleaf.


Remuneration/reward programs and **flexible working hours** were especially important to respondents from the administration and management job family (63% and 58% respectively).

Which of these employment conditions are most important to you?

(Inc. multiple responses)

[n=297]	TOTAL	VY	CO	CD	AM	Lab	MS	WD	BP
Access to education and training, new technology	50%	48%	47%	81%	53%	53%	57%	38%	41%
Remuneration packages/ employee entitlements	49%	46%	47%	37%	63%	33%	50%	75%	34%
Family friendly policies and practices	46%	46%	41%	52%	52%	53%	36%	38%	50%
Recognition/reward programs	41%	38%	44%	48%	32%	33%	71%	13%	47%
Flexible working hours	39%	33%	28%	48%	58%	33%	57%	50%	41%
Mentoring/coaching schemes	12%	12%	9%	11%	13%	7%	21%	13%	13%
Job redesign or rotation	11%	14%	9%	15%	5%	7%	7%	0%	13%
Phased retirement/flexible practices for older workers	9%	6%	9%	19%	5%	7%	7%	0%	13%
Commitment to apprentices	8%	1%	11%	11%	8%	7%	0%	13%	6%
Profit sharing/share ownership	8%	4%	9%	15%	8%	0%	7%	0%	6%
Other services*	3%	4%	1%	0%	2%	7%	0%	13%	3%

*Other services were: transport (x2), transferring employees from one site to another, valued work force, management that listens, accommodation and shift loading for night shift.



Flexible working hours were important for a higher proportion of respondents with employment status other than full-time permanent (54% compared with 35% of full-time permanent).

Regional analysis revealed that **remuneration packages / entitlements** were important for a greater number of Mount Lofty respondents (66%), **recognition/reward** programs for Barossa respondents (50%) and **commitment to apprentices / trainees** was higher for Lower Murray respondents (19%).

Remuneration packages were also more important to males than females (54% compared with 41%) and those who have been in the industry for at least ten years (56%).

Family friendly policies were most important to 35-44 year olds (57%).

Access to education/training and **mentoring/coaching** was most important to employees new to the industry (61% and 22%).

Access to education and training also decreased in importance with age (58% of 15-24 year olds, 48% of 35-44 year olds and 43% of those aged 45 or more).

Phased retirement/ flexible practices were most important to older respondents (18% of those aged 45 or more) and those in the industry for at least 10 years (13%).

Level of education

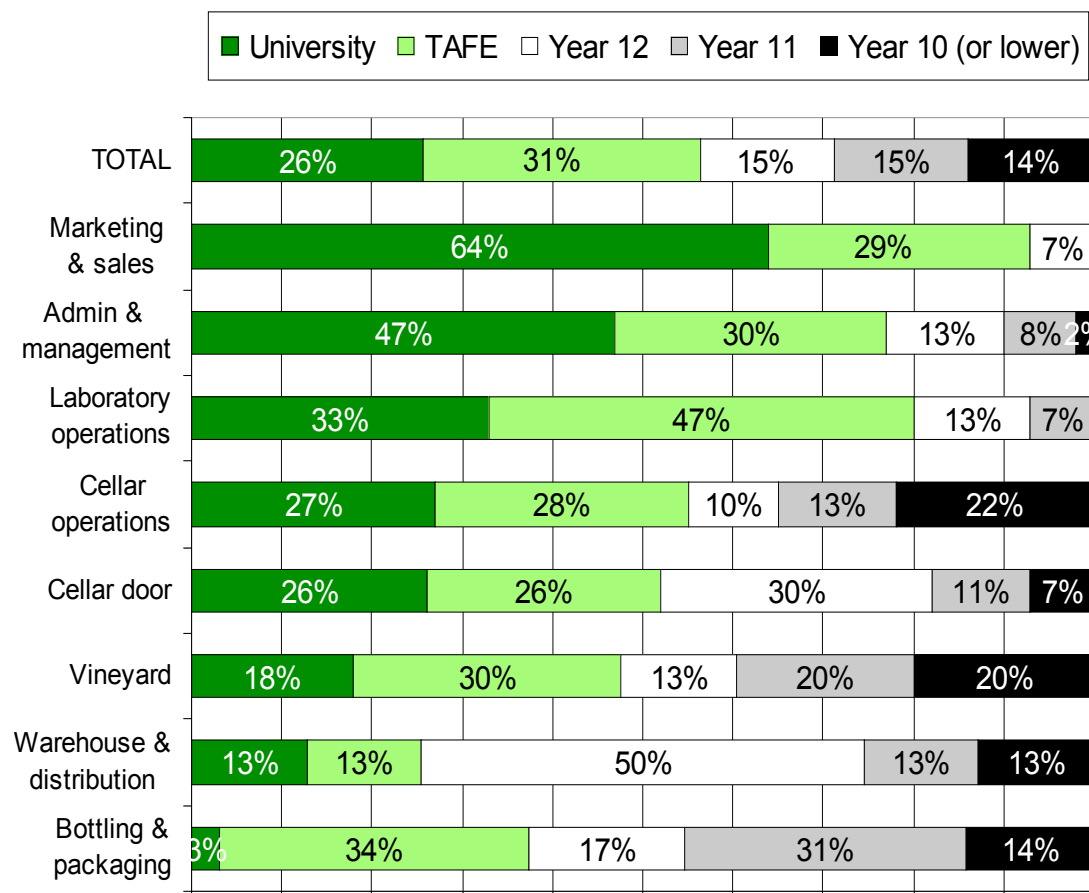
One quarter of respondents had completed **university** training (26%) and a further 31% had completed **TAFE** qualifications.

The remaining 43% had completed no post-secondary education and were split evenly between those who had completed **year 12**, those who had completed **year 11** and those who had completed **year 10 or below**.

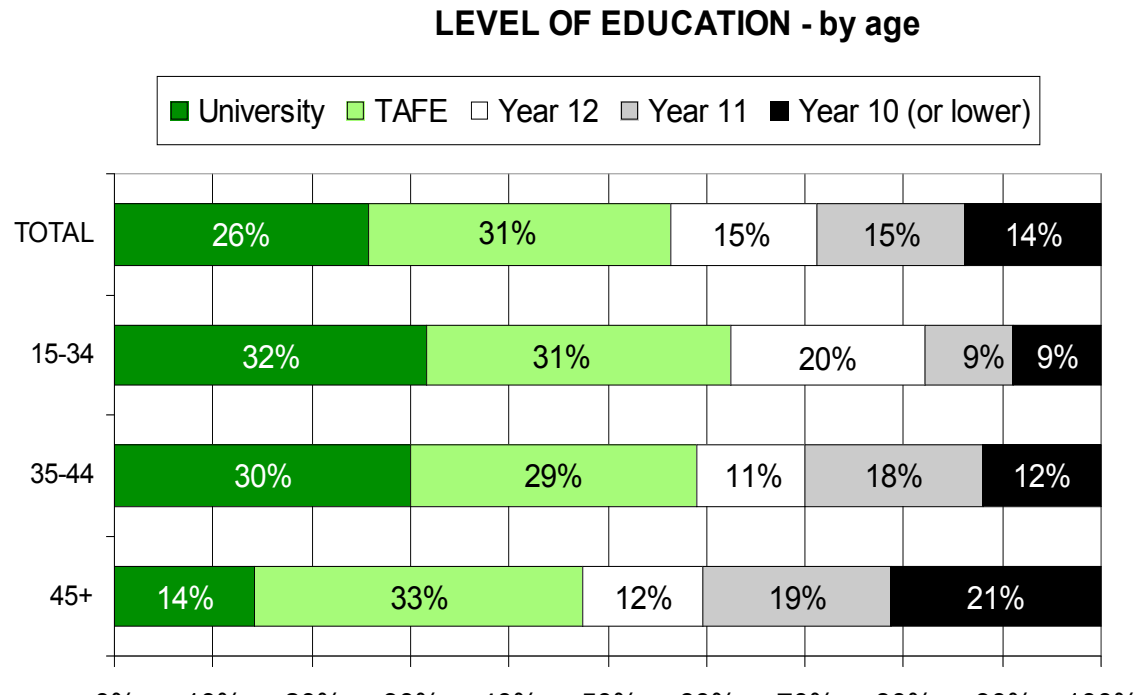
The marketing/sales and administration/management job families had the highest proportions of respondents with **university** qualifications (64% and 47%).

Bottling and packaging had a relatively high proportion of those who had completed **year 11** (31%) and cellar operations had a high proportion who had completed **year 10 or lower** (22%).

LEVEL OF EDUCATION



The chart below shows level of education by age of respondent. It can be seen that the level of education generally declines with age.



Respondents whose employment status was other than full-time permanent had a high proportion of **year 12** graduates (26% compared with 12% of full-time permanent employees). Employees new to the industry also had a high proportion of year 12 graduates (27%).

A higher proportion of males than females had **year 10 or lower** qualifications (17% and 8%).



Specific qualifications

Respondents were also asked to specify their qualifications both inside and outside of the wine and grape industry.

82% of respondents specified some qualification.

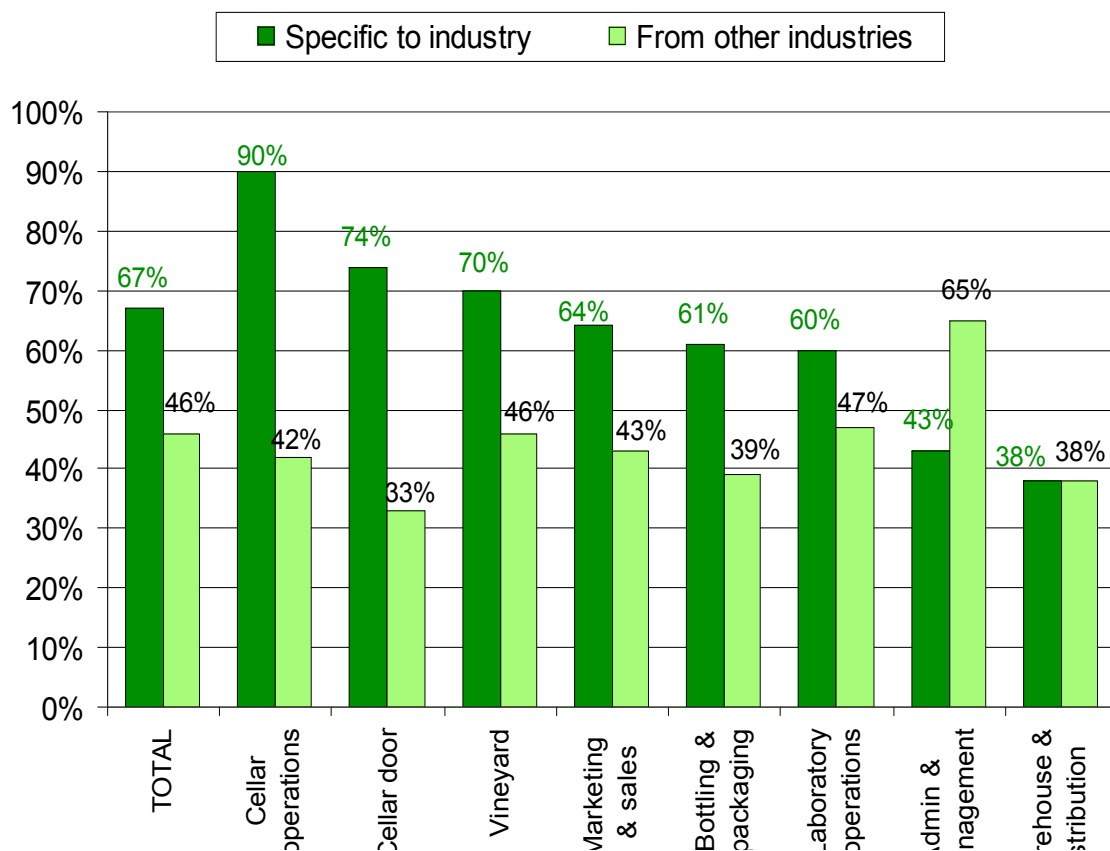
67% of respondents named qualifications **specific to the wine industry** and 46% named qualifications which they indicated were **not specific to the industry**.

It must be noted however, that there was some confusion about where to place certain qualifications (i.e. as industry specific or not industry specific). For example something like a forklift licence has been placed in both categories by different individuals. Some may have thought as it was used for their job it was industry specific and some may have thought that as it was not used only by individuals in this industry it was not industry specific. Responses have been left as they were categorised by individual respondents.

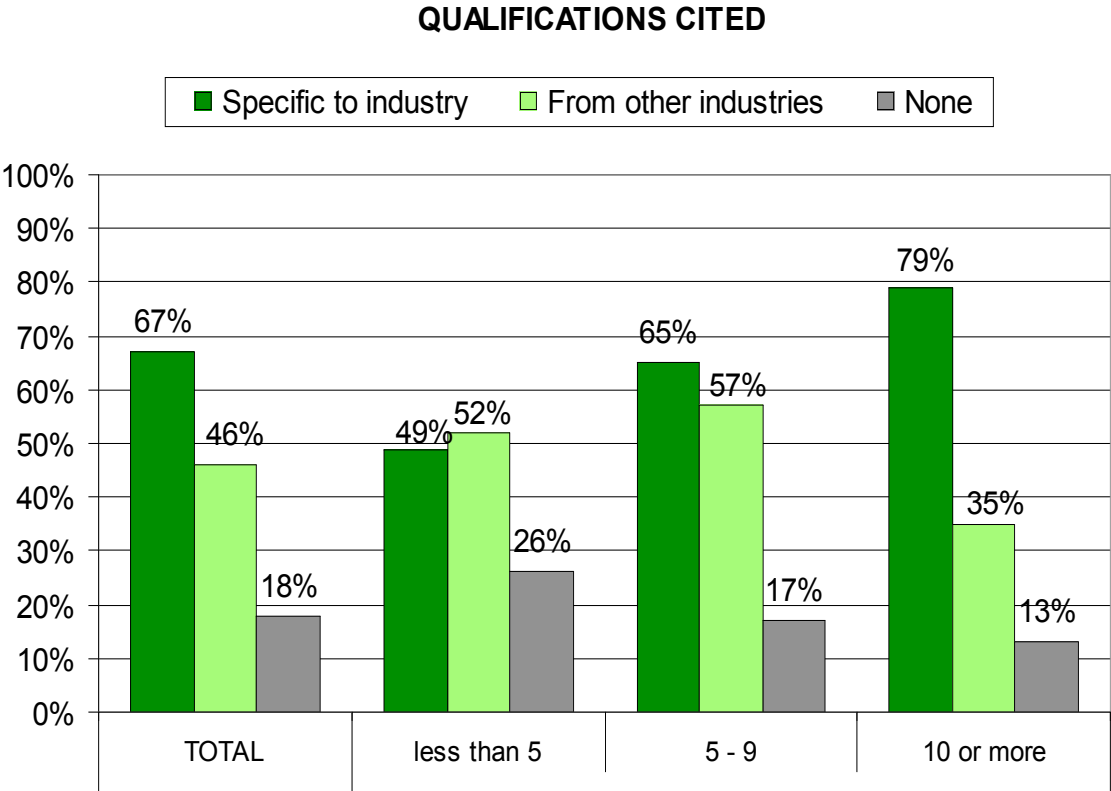
Cellar operations was the job family with the highest proportion of **industry specific** qualifications mentioned (90%).

Administration/management had a significantly low proportion of **industry specific** qualifications mentioned (43%) but a much higher proportion of **qualifications from other industries** (65%).

QUALIFICATIONS CITED



It can be seen from the chart below that respondents that had been in the industry for at least 10 years were the most likely to cite industry specific qualifications. Those in the industry for 5-9 years were the most likely to name qualifications from other industries. Those new to the industry were the most likely to not specify any qualifications.



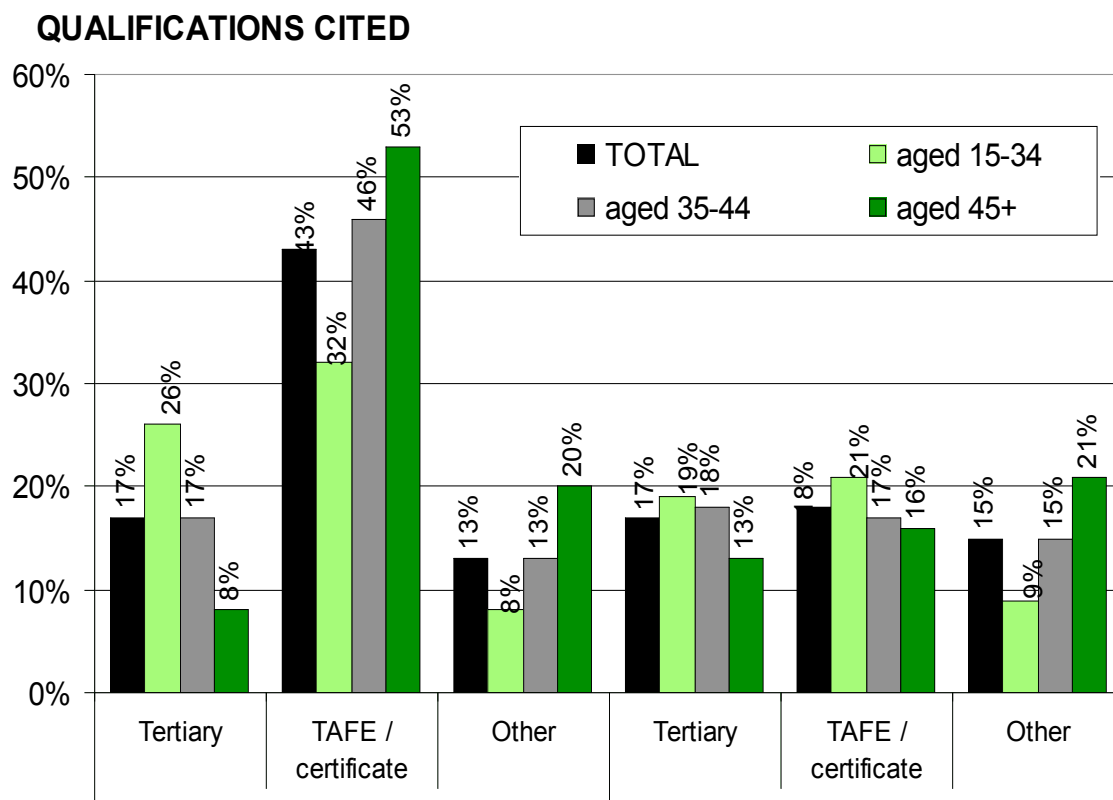
Truscott Research has also categorised qualifications into tertiary, TAFE/certificate and other qualifications.

17% of respondents held **industry specific university** qualifications, 43% industry specific **TAFE/certificate** qualifications and 13% **other** qualifications that are industry specific.

As can be seen in the chart below, younger respondents were more likely than older to hold **industry specific tertiary** qualifications whereas older respondents were more likely than younger to hold industry specific **TAFE/certificate** qualifications. **Other** industry specific qualifications (e.g. chemcert or forklift licences) were also more common for older employees than younger.

17% of respondents held **university qualifications** they considered **unrelated** to the industry, 18% held **TAFE/certificate qualifications** unrelated to the industry and 15% held **other** qualifications unrelated to the industry.

There are no discernable patterns in terms of qualifications from other industries.



In terms of job family variation, cellar operations had a high proportion of respondents with a **TAFE/certificate related** to the industry (64%), vineyard respondents had a high proportion with **other qualifications related** to the industry (25%) and administration/management had a high proportion with **tertiary qualifications unrelated** to the industry (45%).

The Barossa also had a high proportion of respondents with a **TAFE/certificate qualification related** to the industry (56%).

Males also had a higher proportion of **TAFE/certificate qualifications related** to the industry compared with females (51% and 31%).

Examples of **industry specific tertiary** qualifications included: Bachelor of Agricultural Science (Oenology), Bachelor Agricultural Science (Viticulture), Bachelor of Applied Science (Viticulture), Associate Diploma in Wine Marketing, Diploma in Wine Marketing, Bachelor in Wine Marketing and unspecified wine marketing degree.

Examples of **industry specific TAFE/certificate** qualifications included: Certificate I/II/III/IV in Food Processing - Wine, Certificate I/II/III/IV in Viticulture, Wine Appreciation Certificate, Certificate in Wine Grape Growing, Certificate in Horticulture, Certificate III in Laboratory Operations, Certificate in Frontline Management and Wine industry Certificate.

Examples of **other** qualifications **specific to the industry** included: chemcert, first aid certificate, forklift/back hoe/sprayer licence and wine appreciation courses.

Qualifications **outside the industry** included **university degrees** in accounting, management, education, arts, agriculture, business, science and nursing, as well as **TAFE/certificates** in hospitality, baking, frontline management, accounting, aged care, training and assessment, fitter, mechanic and office administration. **Other** qualifications again included forklift licences and first aid certificates.

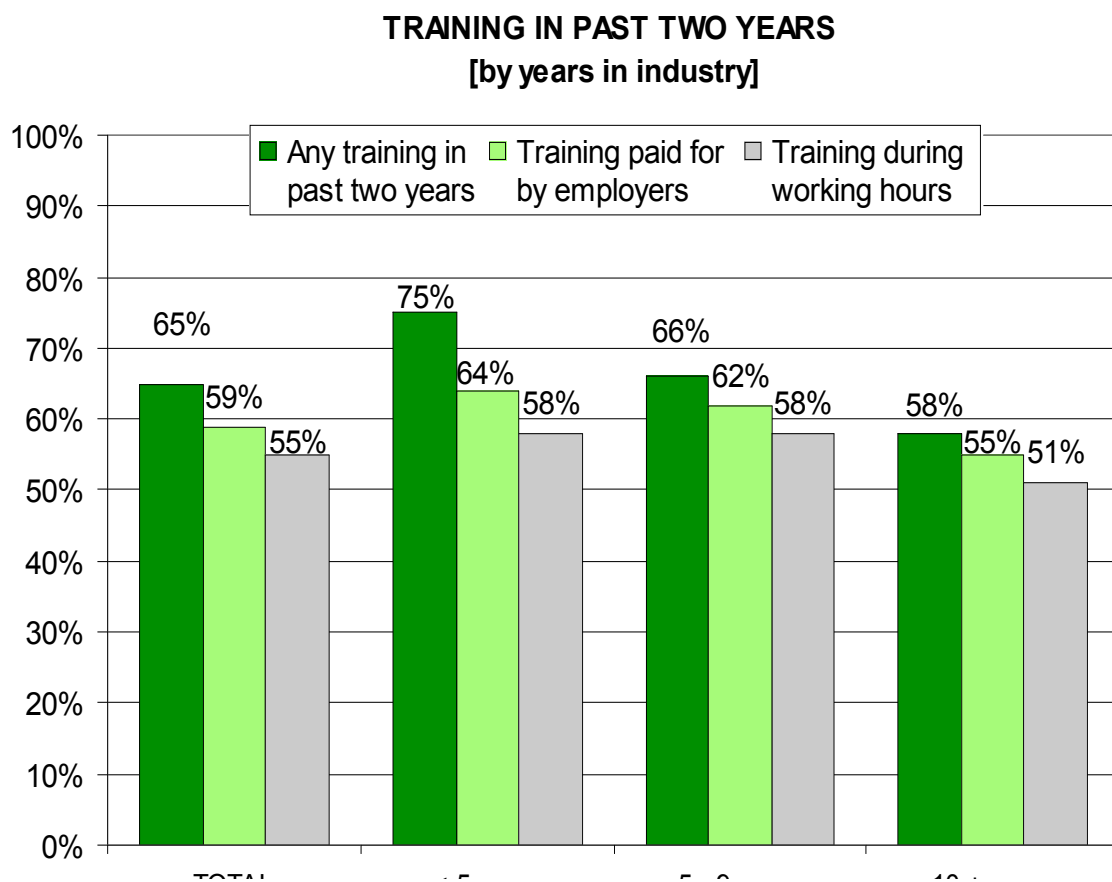
Further information about respondents' qualifications is provided in the appendix.

Training undertaken

Almost two thirds (65%) of respondents indicate that they had **undertaken training** in the last two years.

The majority of that training was **paid for by employers** (59% of total sample) and occurred during work hours (55% of total sample).

Unsurprisingly, a larger proportion of respondents new to the industry reported undertaking training in the past two years (75%).



Over three quarters (77%) of Limestone Coast respondents had undertaken training in the past two years, 75% had undertaken training paid for by employers and 71% during work hours.

Three quarters (74%) of Barossa respondents had undertaken training in the past two years.

Training wanted

Respondents were also asked what training they would like to do to improve their skills in the wine and grape industry. 81 respondents left this question blank and these have been excluded from the percentages cited below.

15% of respondents stated that they did not want any training. 4% stated that they would like any training.

Of the specific training mentioned, **business** training was the most frequent response (34%).

Other relatively frequent responses were training relating to **wine making** (15%), **grape growing** (11%), **sensory / wine assessment** training (10%) and **IT** training (10%).


Grape growing skills and **technical** skills (e.g. forklift licence) were more prevalent for vineyard employees than any other job family (36% and 13%).

Wine making skills and **IT** training were more popular for cellar operations employees (28% and 17%).

What training would you like to do to improve your skills in the wine and grape industry? (Inc. multiple responses)

[n=225]	TOTAL	VY	CO	CD	AM	Lab	MS	WD	BP
Business	34%	26%	33%	48%	43%	15%	50%	57%	19%
Wine making	15%	11%	28%	10%	11%	38%	8%	14%	15%
Grape growing	11%	36%	5%	10%	7%	0%	0%	0%	0%
Sensory training / wine assessment	10%	2%	10%	33%	11%	0%	17%	0%	4%
IT	10%	4%	17%	14%	9%	0%	8%	14%	7%
Technical	5%	13%	2%	0%	2%	8%	0%	0%	0%
Other*	8%	4%	7%	10%	9%	15%	8%	0%	15%
Any	4%	9%	3%	0%	2%	8%	0%	0%	7%
None / DK	15%	4%	16%	0%	13%	31%	8%	14%	41%

*Other includes environmental, OH &S, AQF not further specified and chemistry.



Sensory training / wine assessment was more popular for respondents with employment status other than full-time permanent (18% compared with 8% of full-time permanent). It was also more popular with females (16%) than males (6%) and with younger respondents (15% of those 15-34). This training was least popular with respondents who had been in the industry for at least 10 years (4%).

Grape growing skills were most in demand in the Mount Lofty region (22%) while **IT** skills were more in demand in the Barossa (18%).

The Barossa also had the highest proportion of **no training** required responses (26%). Males were more likely to indicate they did not need further training than females (19% and 9%) and older respondents were more likely to indicate they did not need further training than younger respondents (23% and 5%).



Willingness to contribute to cost of training

Of the 191 respondents who cited specific training they desired, 67% (41% of all respondents) were prepared to contribute to the cost of that training.

A further 23 respondents (8% of all respondents) who had not cited specific training were also prepared to contribute to costs of any training they might need.

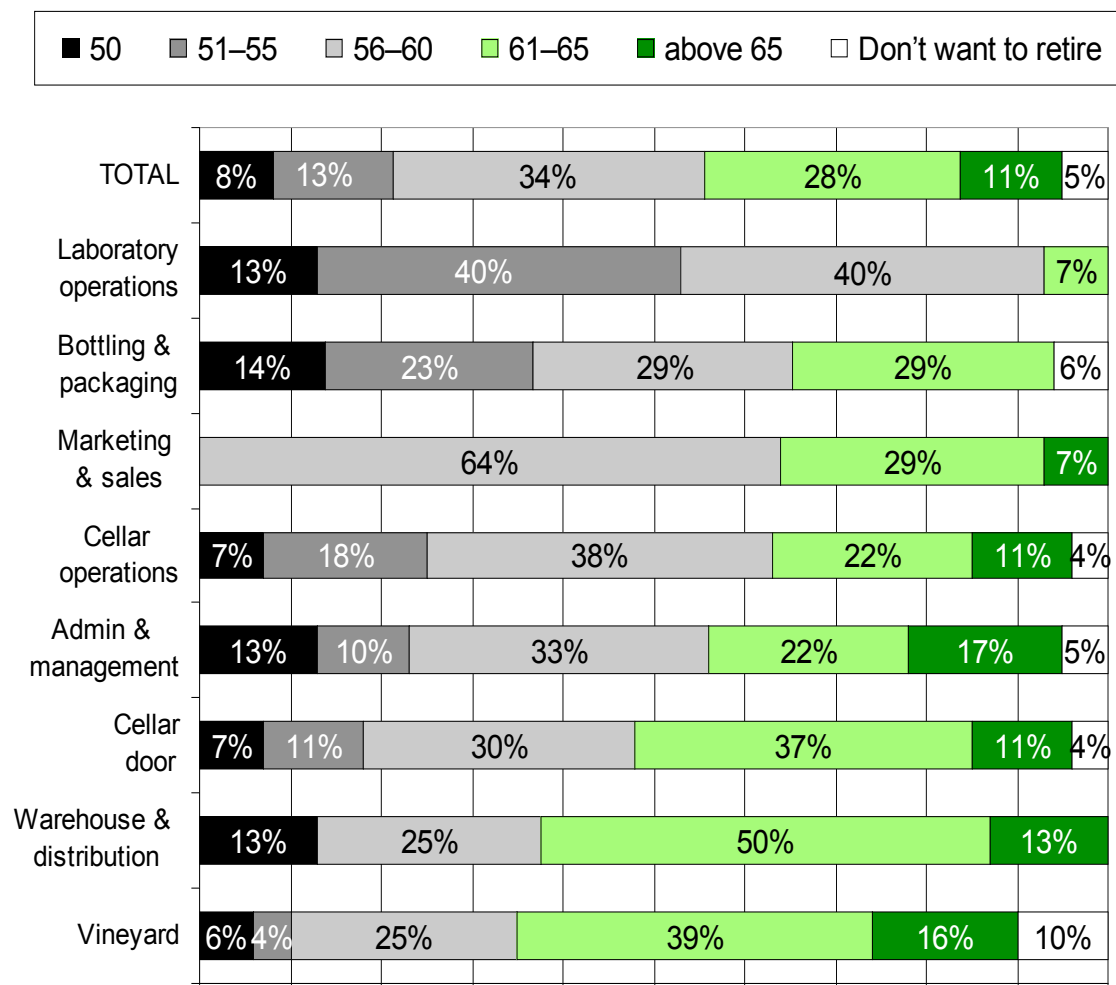
There were no significant variations across subgroups.

Ideal retirement age

The age bracket most often specified as respondents' ideal retirement age was **56-60** (34%), followed closely by **61-65** (28%).

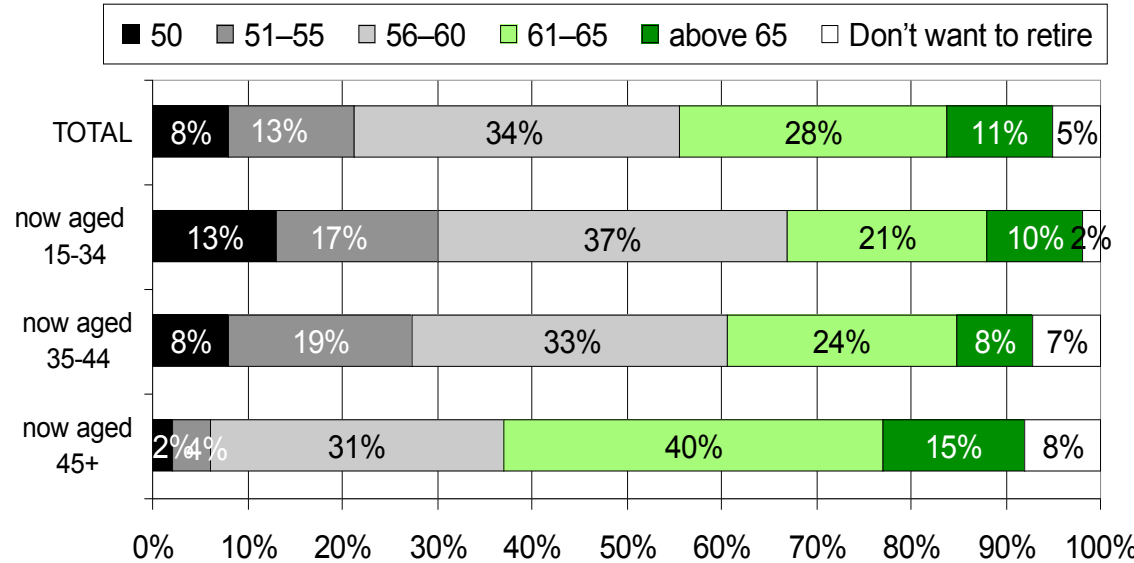
As can be seen from the chart below, respondents from the vineyard job family were more likely to want to retire later than those from other job families (55% aged 61 or higher, 10% not at all).

IDEAL RETIREMENT AGE



Ideal retirement age differs with the age of the respondent. Younger respondents have the highest proportion of **age 50** responses (13%) and older respondents have the highest proportion of **61-65** responses (40%).

IDEAL RETIREMENT AGE
- by age of respondent



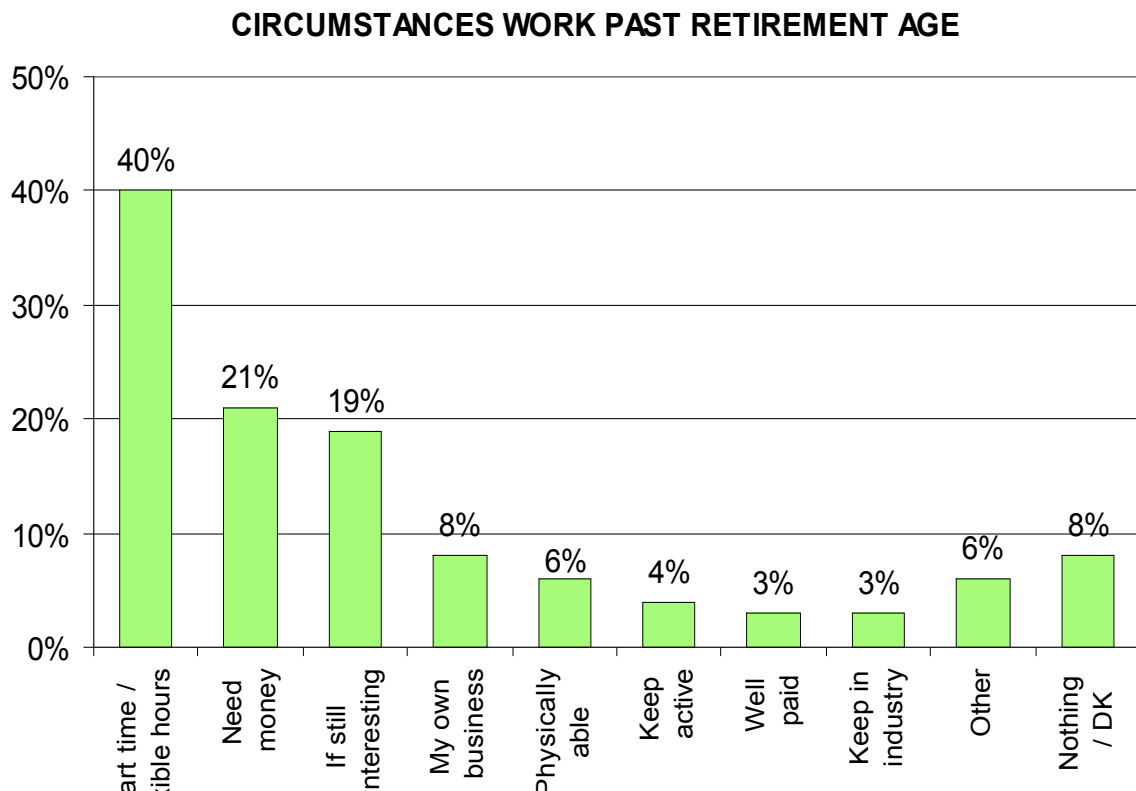
Almost one quarter (24%) of Lower Murray respondents reported their ideal retirement age as **51-55** years old. There were no other significant regional differences.

50 years old was a more popular response for females than males (12%, 5%).

Incentives to work longer

Respondents were asked to indicate the circumstances under which they would still want to work when they reached retirement age.

Popular responses were **part time work / flexible hours** (40%), **if needed the money** (21%) and **if work was still interesting** (19%).



If physically able to work was also a relatively common response for those in the vineyard job family (15%) as was **owning the business** for respondents from the Mount Lofty Ranges region (16%).

If work was still interesting was more popular for females than males (28%, 13%) and was also more popular for younger respondents than older (31%, 11%).

Part time/ flexible hours was a prevalent response for older respondents (48% of those aged 45+).

Attitude to work

Half (48%) of all respondents labelled themselves as **work/life balancers**.

One quarter (27%) self-described as **wanting it all** and 14% described themselves as **working to live**.


Respondents from the bottling/packaging job family were the most likely to self-describe as **working to live** (34%), they were also the least likely to self-describe as a **work/life balancer** (31%).

Seven respondents felt that none of these categories related to them, they have been excluded from the percentages cited below.

Which of the following best describes your attitude to the role of work in your life?

(Inc. multiple responses)

[n=299]	TOTAL	VY	CO	CD	AM	Lab	MS	WD	BP
Work/life balancer (flexible hours /part-time, stimulating work with responsibility)	48%	39%	47%	70%	57%	80%	50%	71%	31%
Want-it-all (ambitious, need challenging, varied, well-paid work)	27%	36%	26%	30%	22%	13%	43%	0%	17%
Work-to-live (don't mind repetitive tasks, not interested in long hours or promotions)	14%	16%	13%	7%	10%	7%	0%	14%	34%
Pleasure seeker (don't want work to affect personal and social life)	9%	6%	12%	4%	5%	0%	0%	14%	17%
Live-to-work (ambitious, work long hours, desire promotion, work before home life)	4%	4%	4%	0%	7%	0%	7%	0%	3%



Work to live responses were frequent for those with employment status other than full-time permanent (27% compared with 11% of full-time permanent). Respondents who had been in the industry for between 5 and 9 years also had high proportions of work to live (21%). Older respondents were more likely than younger to work to live (23% and 8%).

Younger respondents were more likely than older respondents to **want it all** (43% and 17%). Respondents new to the industry also had high proportions of want it all (37%). The Barossa had a lower proportion of respondents who want it all (16%).

Females were more likely to be **work/life balancers** than males (57% and 43%). The Lower Murray had a much higher proportion of **pleasure seekers** than other regions (25%) but a lower proportion of **work/life balancers** (31%).

Plans for the future

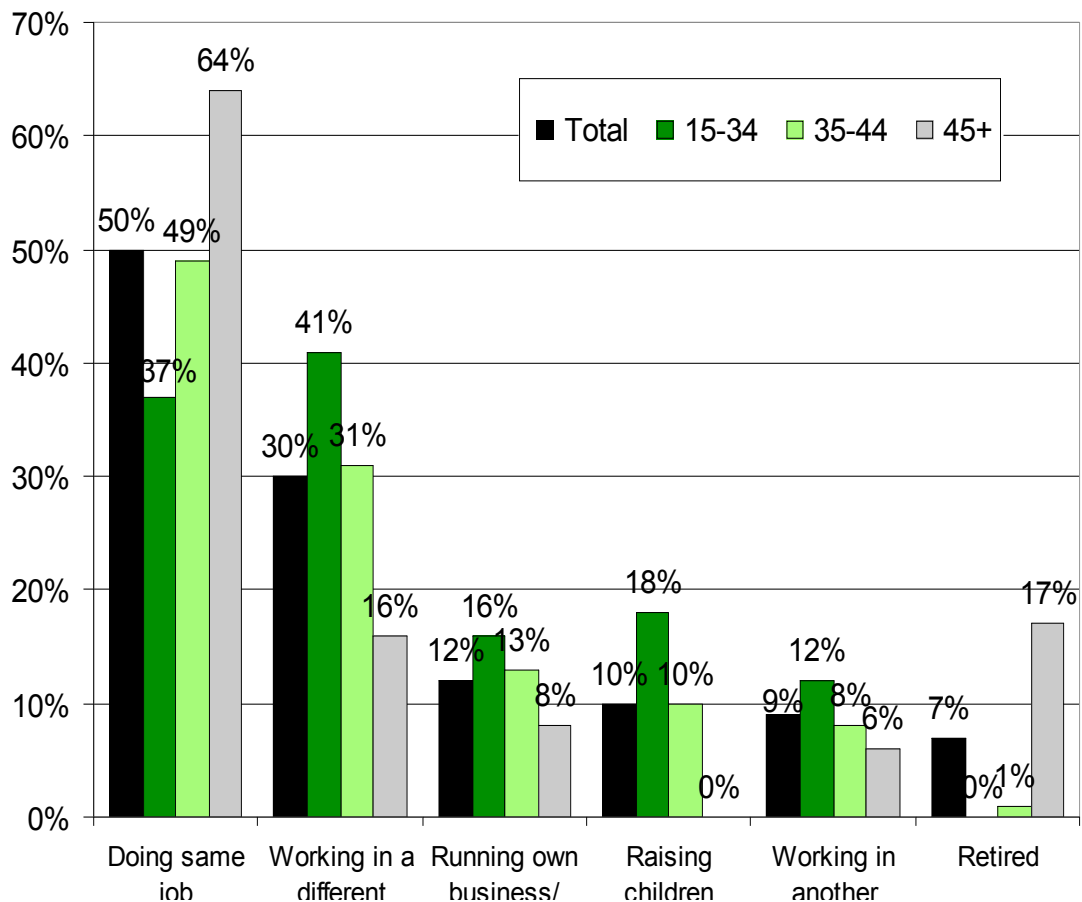
Half (50%) of all respondents intended to be in the **same job** in five years time.


Another third (30%) intended to be in a **different position** but still within the wine and grape industry.

Younger respondents have higher proportions of **raising children** (18%) and working in a **different position** in the industry (41%) than older respondents (0% and 16%).

Older respondents have high proportions of **retiring** (17%) or **doing the same job** (64% compared with 37% of younger).

PLANS FOR FUTURE
[by age of respondent]





Respondents from the administration/management job family were more likely to indicate **raising children** (18%) than those from the vineyard (3%). However this may have something to do with the higher proportion of females in administration/management as results are similar when comparing against gender. 20% of female employees expect to be raising children in 5 years time compared with 3% of males. Males are also slightly more likely to expect to be retired in 5 years time (9% compared with 2% of females).

Barriers to employment

One third of all respondents (32%) could name some factor that was a barrier to their employment.

The most frequently mentioned barriers were **distance to work** (11%) and **lack of public transport** (10%).

Lack of public transport was especially an issue for bottling/packaging employees (22%).

Vineyard and administration/management employees were the most likely to cite **no barriers** to employment (77% and 80%). Cellar operations and bottling/packaging employees were the least likely (56% and 53%).

Are there any other factors that are barriers to your employment?

(Inc. multiple responses)

	TOTAL	VY	CO	CD	AM	Lab	MS	WD	BP
Distance to work too far	11%	6%	14%	11%	7%	27%	29%	38%	11%
Lack of public transport	10%	7%	6%	4%	10%	7%	7%	13%	22%
Affordable housing	6%	7%	9%	0%	8%	0%	0%	25%	8%
Accessing childcare	5%	7%	9%	0%	0%	13%	0%	0%	6%
Other	4%	0%	9%	0%	0%	7%	7%	0%	6%
None	68%	77%	56%	85%	80%	47%	64%	50%	53%

Lack of public transport was a significant concern for Barossa employees (17%).



Important skills for job success

Respondents were asked to think about their current job and indicate which skills were most important to job success.

The most popular responses were **technical skills** e.g. pruning, machine work, wine making (21%), **customer service** (21%) and **communication** (18%).

Other relatively frequent responses were **time management** (14%), **knowledge** of product / region / work area (14%), **business skills** e.g. financial, planning, negotiating (12%), **people management** / supervising (11%), **attention to detail** / concentration / accuracy (10%) and **multi-tasking** / flexibility (10%).

Other minor responses are also listed in the table overleaf.


It can also be seen from the table that technical skills were mentioned more often by vineyard employees (31%), while time management and business skills were mentioned more often by administration/management employees (30% and 26% respectively).

Thinking about your current job, which skills are most important to job success?

[Multiple response]

blanks removed [n=242]	TOTAL	VY	CO	CD	AM	Lab	MS	WD	BP
Technical skills e.g. pruning	21%	31%	24%	4%	2%	36%	11%	25%	27%
Customer service	21%	14%	12%	64%	23%	9%	22%	0%	7%
Communication	18%	14%	12%	28%	21%	9%	56%	25%	17%
Time management / organisation / efficiency	14%	5%	12%	12%	30%	18%	22%	25%	7%
Knowledge of product/ region / work area	14%	10%	12%	60%	6%	0%	11%	0%	3%
Business skills	12%	12%	7%	16%	26%	9%	22%	50%	3%
People management	11%	14%	10%	20%	9%	18%	22%	0%	7%
Attention to detail / concentration / accuracy	10%	10%	8%	0%	17%	18%	0%	25%	13%
Multi-tasking / flexibility	10%	5%	8%	8%	13%	27%	44%	0%	3%
Motivation / good work ethic	9%	8%	7%	4%	11%	9%	0%	0%	20%
Problem solving / initiative	9%	8%	5%	4%	11%	9%	0%	0%	17%
Computer skills	8%	3%	5%	24%	11%	18%	0%	25%	3%
Teamwork / getting along with co-workers	4%	7%	7%	0%	2%	0%	11%	0%	0%
Willingness to learn	4%	5%	8%	0%	0%	18%	0%	0%	0%
Reliability	2%	0%	3%	0%	0%	9%	0%	0%	3%
Common sense	2%	2%	0%	0%	0%	9%	11%	0%	7%
Patience	2%	2%	3%	4%	2%	9%	0%	0%	0%
Listening / follow instructions	2%	5%	3%	0%	0%	0%	0%	0%	0%
Other*	16%	19%	15%	8%	11%	0%	33%	50%	17%

*Other includes experience, teaching ability, creativity, fitness and all.



Respondents with employment status other than full-time permanent were particularly likely to nominate **knowledge** and **customer service** responses (33% each compared with 8% and 17% of full-time permanent).

Females were more inclined than males to cite:

- **customer service** (28% compared with 16%)
- **communication** (26% compared with 13%)
- **time management / efficiency** (22% compared with 10%)
- **multi-tasking/flexibility** (15% compared with 7%)
- and **computer skills** (15% compared with 4%)

Males had higher proportions of **technical skill** responses (27%) compared with females (12%).

Respondents new to the industry had high proportions of **knowledge** (23%) and **problem solving/initiative** responses (14%). Respondents who have been in the industry between 5 and 9 years had a high proportion of **time management/efficiency** responses (22%) and respondents who have been in the industry for at least 10 years had a high proportion of **people management** responses (17%).

Younger respondents also had a higher proportion of **problem solving/initiative** responses than older respondents (14% and 3%). Respondents aged 35-44 had the highest level of **willingness to learn** responses (10%).

Skills audit

Respondents were asked to indicate which wine and grape industry tasks they were able to perform and also how often they performed each task in their current position. A detailed analysis of this data will be performed separately from the current report. However a summary of the proportion of respondents who performed tasks from each job family is shown in the table below.

The majority of respondents (93%) were able to perform at least one **general** task (note. three people left the whole task audit blank).

Two thirds (68%) of respondents could perform tasks in the **management and administration** family, one third (34%) could perform tasks in the **warehouse and distribution** family.

One quarter of respondents could perform tasks in **wine grape growing** (28%), **cellar door sales** (25%), **cellar operations** (25%) or **bottling and packaging** (24%).

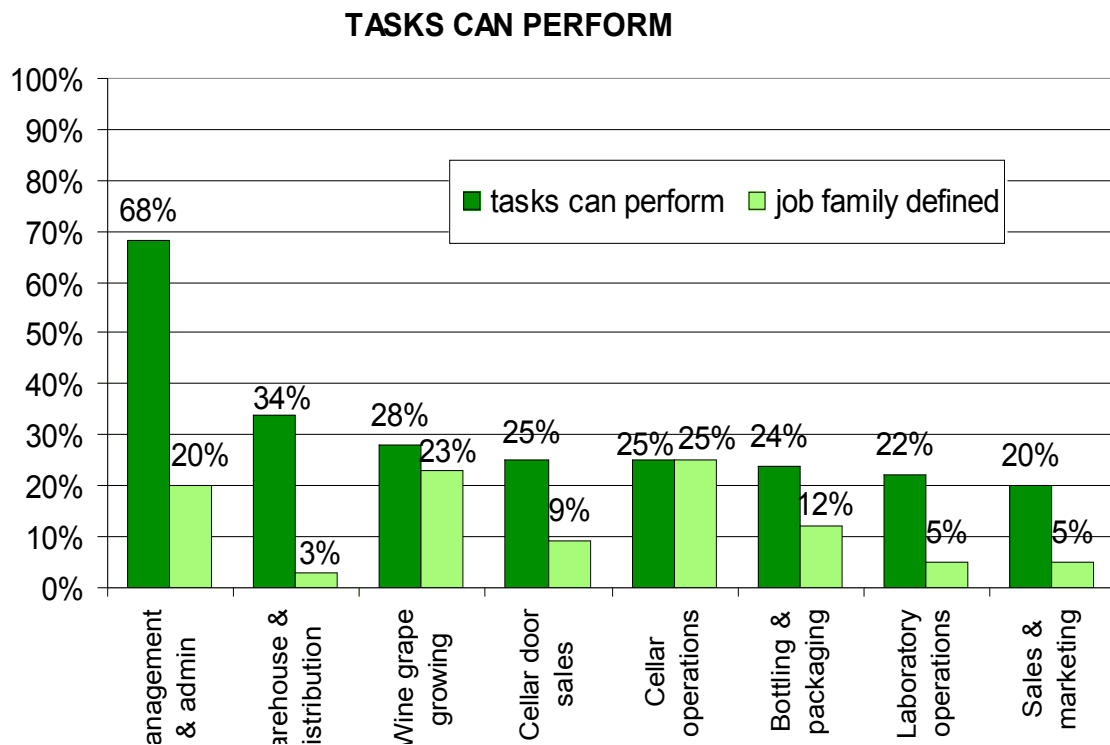
One in five could perform tasks in **laboratory operations** (22%) or **sales and marketing** (20%).


Below are a list of tasks in the wine and grape industry. Indicate whether you are able to perform that task ...

[Multiple response]	TOTAL	VY	CO	CD	AM	Lab	MS	WD	BP
General tasks / skills	93%	85%	100%	93%	93%	100%	86%	87%	97%
Management & admin	68%	49%	62%	85%	100%	67%	93%	100%	44%
Warehouse & distribution	34%	18%	40%	59%	43%	13%	21%	100%	25%
Wine grape growing	28%	94%	13%	4%	12%	0%	7%	12%	8%
Cellar door sales	25%	4%	23%	93%	37%	0%	64%	37%	8%
Cellar operations	25%	4%	88%	0%	7%	20%	0%	12%	8%
Bottling & packaging	24%	17%	26%	11%	8%	7%	7%	37%	83%
Laboratory operations	22%	7%	46%	7%	12%	100%	7%	25%	14%
Sales & marketing	20%	7%	14%	70%	28%	0%	100%	37%	6%

The chart below compares the proportion of respondents claiming to know how to perform tasks in each job family compared with the proportion of respondents who described themselves as working in each job family.

The proportion of respondents who could perform tasks in a job family was higher than those who defined themselves as working in a job family for all job families except cellar operations.





When looking at tasks performed outside of their own job family, respondents from the **cellar operations** job family had a higher proportion performing **laboratory operations** tasks than other job families (46% compared with 7% of vineyard and 12% of admin). **Administration/management** had a higher proportion performing **cellar door sales** tasks (37% compared with 4% of vineyard and 8% of bottling).

Comparing other subgroups, it can be seen that full-time permanent employees had higher proportions performing **management/administration** tasks (71% compared with 56% of other employment status), and **laboratory operations** tasks (25% compared with 12%). They had a lower proportion performing **cellar door sales** tasks (21% compared with 36%).

Females had a higher proportion performing **management/administration** tasks (80%), **sales and marketing** tasks (35%), **warehouse and distribution** tasks (47%) and **cellar door sales** tasks (44%) than males and (60%, 11%, 26%, 13%).

Males had a higher proportion performing **cellar operations** tasks (36%) and **wine grape growing** tasks (37%) compared with females (9% and 15%).)

Older respondents had a low proportion performing **management/administration** tasks (60% compared with 72% of younger and 71% of 35-44 year olds).

Younger respondents had a high proportion of performing **bottling and packaging** tasks (33% compared with 18% of older), **laboratory operations** tasks (31% compared with 16% of older) and **cellar door sales** tasks (32% compared with 15% of 35-44 year olds and 23% of older).

Wine grape growing tasks were more frequently mentioned by respondents who had been in the industry for at least 10 years (35%) compared with those new to the industry (15%).