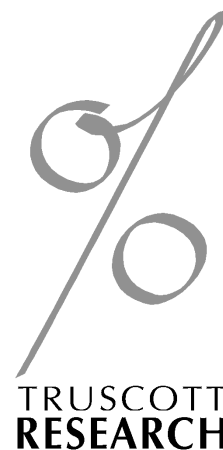


WINE & GRAPE INDUSTRY SURVEY (May/June 2007)

Good My name is from Truscott Research. We are conducting a random survey of companies in the wine & grape industry on behalf of government and industry bodies [SA Wine Industry Association, Winemakers Federation of Australia Department of Further Education Employment Science and Technology and Primary Industries and Resources SA].

We need to speak to the manager who looks after human resources and all the information we collect is entirely confidential. We only report on averages and trends across the industry and never report on anything which would identify your business. The information we collect is essential to understand and prepare for the industry's future workforce needs.



Section ONE: Wine and grape business demographics

- 1 Firstly, can I just check you are in the ... [READ FROM SAMPLE FILE] G I Zone?
 - [1] Adelaide
 - [2] Barossa
 - [3] Far North
 - [4] Fleurieu
 - [5] Limestone Coast
 - [6] Lower Murray
 - [7] Mount Lofty Ranges
 - [8] the Peninsulas

- 2 How many employees (include owners but excluding casuals) work in each of these areas? (EACH PERSON COUNTS AS ONE EMPLOYEE – FULL TIME, PART TIME AND CASUALS. SELECT ONE AREA ONLY FOR EACH EMPLOYEE – WHERE THEY SPEND MOST TIME)
 - Vineyard (wine grape growing)
 - Cellar operations
 - Cellar door sales
 - Administration and Management
 - Laboratory operations
 - Marketing and sales
 - Warehouse and distribution
 - Bottling and Packaging

- 3 Can you give me an approximate dollar value spent on contractors in the last twelve months? [LEAVE BLANK FOR DON'T KNOW/REFUSED]

- 4 What type of business structure do you use?
 - [1] sole operator
 - [2] family business
 - [3] trust
 - [4] company
 - [5] partnership
 - [6] other –SPECIFY

- 5 What is your business turnover? – I will read some ranges ...
[would it be more or less than \$500,000]
 - [1] up to \$50,000
 - [2] \$51–\$100,000
 - [3] \$101–\$500,000
 - [4] \$501–\$750,000
 - [5] \$751,000– \$5 million
 - [6] \$5.1–\$10 million
 - [7] over \$10 million
 - [8] refused

Section TWO: Workforce planning

- 6 Which of the following workforce planning activities does your business undertake? These activities could be formal or informal.**
- [1] Identify skills/labour needed in the future**
 - [2] Collect employee demographic information (age, gender, ethnicity)**
 - [3] Identify employees' retirement intentions**
 - [4] Succession planning**
 - [5] Identify employees' working preferences**
 - [6] Other, please specify**
 - [7] None of these**
- 7 Are you facing or expecting to face labour shortages? When?**
- [1] yes - current**
 - [2] yes - next 3 years**
 - [3] yes - next 5 years [up to 2012]**
 - [4] yes - next 10 years**
 - [5] yes – but no idea of timing**
 - [6] no**
- 8 IF ANY: Involving which jobs/areas?**
- 9 In your view, what external information do workplaces/industries need to be able to plan for future workforce needs?**
- [1] yes - SPECIFY**
 - [2] no**

Section THREE: Wine and grape industry trends

- 10 Which of the following will be significantly different in the grape and wine production business in 2010?**
- [1] Markets**
 - [2] Business climate**
 - [3] Types of business**
 - [4] Product**
 - [5] Technology**
 - [6] Production**
 - [7] Workload cycles**
 - [8] None of these**
 - [9] Other - SPECIFY**
- 11 Which one of these factors above will have the most impact on your business?**
- 12 Will the impact be positive or negative? Why?**
- [1] positive - SPECIFY**
 - [2] negative - SPECIFY**
 - [3] Neither**

13 What external factors or infrastructure issues specific to your region are impacting on your business? UNPROMPTED

- [1] Public Transport availability
- [2] Lack of affordable housing
- [3] Limited temporary accommodation for seasonal workers
- [4] Water (quality, scarcity)
- [5] Transportation
- [6] Land availability/zoning
- [7] Environmental (salinity, greenhouse gas emissions)
- [8] Lack of suitable employment for employee spouses
- [9] Lack of suitable education facilities
- [10] Other - SPECIFY
- [11] Can't think of any/none

14 What are the other key external factors impacting on the industry generally? UNPROMPTED

- [1] Public Transport availability
- [2] Lack of affordable housing
- [3] Limited temporary accommodation for seasonal workers
- [4] Water (quality, scarcity)
- [5] Transportation
- [6] Land availability/zoning
- [7] Environmental (salinity, greenhouse gas emissions)
- [8] Lack of suitable employment for employee spouses
- [9] Lack of suitable education facilities
- [10] Other – SPECIFY
- [11] Can't think of any/none

Section FOUR: Recruitment, turnover and retention

Recruitment

15 What attracts people to the wine and grape industry?

[NEED TO DEVELOP CODE FRAME FOR THIS UNPROMPTED QUESTION]

16 What deters people from entering the wine and grape industry?

[NEED TO DEVELOP CODE FRAME FOR THIS UNPROMPTED QUESTION]

17 Which of these sources do most of your staff come from? READ OUT

- [1] Schools
- [2] TAFE
- [3] University
- [4] Local networks
- [5] Industry networks
- [6] Recruitment agencies

[7] other

18 What will be the main strategies you adopt to ensure that you have a sufficient supply of skilled labour to meet demand in 2010? I will read a list of possibilities.

[1] Recruit and train new staff

[2] Upskill existing workers

[3] Increased use of contractors

[4] Increase shifts/rosters

[5] Rely on migration

[6] Improve productivity

[7] Introduce new technology

[8] Work closely with education and training providers to source workers

[9] Job redesign/rotation

[10] Other – SPECIFY

[11] None of these

19 How many additional staff do you think you will need in 2010?

LEAVE BLANK IF DK/RECORD MID POINT OF RANGE/IF 0 – GO TO Q 21

20 Which occupations will these positions mainly be in?

[1] Vineyard (wine grape growing)

[2] Cellar operations

[3] Cellar door sales

[4] Administration and management

[5] Laboratory operations

[6] Marketing and sales

[7] Warehouse and distribution

[8] Bottling and packaging

[9] Other – SPECIFY

21 ASK ALL: The last time you hired staff did you have any difficulties finding suitable applicants?

[1] yes

[2] no – GO TO Q 23

22 IF YES: In what occupation areas did you have difficulties in finding suitable applicants?

[1] Vineyard (wine grape growing)

[2] Cellar operations

[3] Cellar door sales

[4] Administration and management

[5] Laboratory operations

[6] Marketing and sales

[7] Warehouse and distribution

[8] Bottling and packaging

[9] Other – SPECIFY

23 ASK ALL: Are there any special factors that make it difficult to attract suitable applicants for your business? UNPROMPTED

- [1] Insufficient local training positions
- [2] Wages/remuneration not competitive
- [3] Specialised skill needs
- [4] Type of work not perceived well
- [5] Location remote/not perceived well
- [6] Specific licensing or registration required
- [7] School leavers lack of skills/experience
- [8] Poor attitudes of applicants
- [9] Terms and conditions of employment
- [10] Other – SPECIFY
- [11] Can't think of any/none

24 And are there any other barriers in your business to hiring staff? UNPROMPTED

- [1] I cannot find anyone who wants to work in my industry.
- [2] I cannot find staff with the appropriate skill set.
- [3] I cannot find staff at the right price.
- [4] I can find staff but they cannot find a place to live.
- [5] Other - SPECIFY
- [6] No barriers - GO TO Q 26

25 Have you considered strategies to attract?

- [1] Indigenous workers
- [2] Women returning to the workforce
- [3] Workers with disabilities
- [4] Young people
- [5] Older workers
- [6] None of these

Turnover and Retention

26 Have staff (apart from short-term contractors) left your business in the past 12 months for any of the following reasons?

- [1] Wages not high enough
- [2] Working hours not suited to employee
- [3] Limited career path
- [4] Interpersonal conflict
- [5] Employee wanted better conditions
- [6] Fixed term contract expired
- [7] None of these

27 When will employee retirements hit you the hardest?

- [1] next 12 months
- [2] 12 - 24 months
- [3] 3 – 5 years' time
- [4] after 2012
- [5] don't know
- [6] not expecting a problem

28 Have you considered any of these strategies to retain existing workers?

- [1] Introduce family friendly policies and practices
- [2] Recognition/reward programs; profit sharing or share ownership schemes
- [3] Review remuneration packages and employee entitlements
- [4] Access to education and training, new technology
- [5] Mentoring/coaching schemes
- [6] Phased retirement/flexible practices for older workers
- [7] Commitment to apprentices/traineeships
- [8] Job redesign or rotation
- [9] Providing/subsidizing child care
- [10] Training for managers/supervisors
- [11] Other services eg transport, accommodation, education
- [12] None of these

Section FIVE: Training and skills development

Apprenticeships and traineeships

29 In the last 5 years, have you employed or attempted to employ apprentices/trainees under a formal contract of training to fill job openings (directly or through Group Training Companies)?

- [1] Yes
- [2] Attempted but not successful – WHY NOT?
- [3] No - not applicable to my business
- [4] No [other]

Training, Skills and career development

30 Do you currently have any skill gaps or shortages in your workplace?

- [1] yes
- [2] no

31 IF YES, what types of skills?

32 What skills do you anticipate you will need more of in 2010?

33 What skills do you anticipate you will need less of in 2010?

34 What are the barriers to increasing the knowledge/skills of your staff?

- [1] I don't know where to get the training I need for my staff/ self.
- [2] I need customised training and I can't find it.
- [3] I need customised training, but it's not locally available.
- [4] I don't have the resources to send staff away for training during business hours.
- [5] I train them and they leave.
- [6] I can't find training with the right content
- [7] Other - SPECIFY

35 Does your organisation use mentoring, coaching or any other action to enable knowledge transfer from experienced workers to other employees?

[1] Yes

[2] No

36 Are there clearly defined career paths in your company/business?

IF YES – would you be willing to participate in a further interview on this topic?

[1] yes - OK to recontact

[2] yes – but do not recontact

[3] no

Section SIX: Workplace Entitlements/Conditions

37 During the last year, which of the following has been used by or offered to the majority of your non-managerial staff:

[1] paid or unpaid maternity leave

[2] paid or unpaid paternity leave

[3] performance related pay component

[4] bonus, profit-sharing scheme, or share ownership scheme

[5] salary packaging

[6] annualised salary (paid over 12 months, but work less than 12 months)

[7] paying out accrued holidays

[8] paying out accrued sick leave

[9] formal disciplinary procedures

[10] formal grievance handling

[11] formal performance assessment

[12] time off for personal matters

[13] compressed work week or banking of hours

[14] formal system of job rotation

[15] policy of allowing employees to engage in volunteer activities

[16] exit interviews

[17] pre-employment testing (medical or psychological)

[18] none of these

38 And finally, how would you rate employee morale overall?

[1] Excellent

[2] Generally good

[3] OK

[4] low

39 There is also an employee survey. If I was to arrange to have employee questionnaires posted out, would you be able to distribute them?

[1] yes

[2] no

**On behalf of Truscott Research and our clients,
thank you for your contribution to this study.**