

## 4. Findings: Industries.

### 4.1. Beef – Total Industry (Pastoralists and Intensive).

#### 4.1.1. Number of staff.

Table 33: Number of full time and part time staff (Beef Industry)

	Nett 1 or more (% of businesses with ANY of these staff)	Number of employees in each position description							
		0	1	2	3	More than 3	TOTAL	Mean	Median
Full time staff	22%	78%	7%	5%	4%	6%	100%	0.8	0
Part time staff	13%	87%	8%	2%	2%	2%	100%	0.2	0

Q1. Excluding yourself and any family members, how many full time staff do you employ? RECORD  
NUMBER 0 - 999 (Base: Total Beef industry n=256)

Q2. Again excluding yourself and any family members, how many part time staff do you employ? RECORD  
NUMBER 0 - 999 (Base: Total Beef industry n=256)

#### 4.1.2. Use of casual labour.

Table 34: Number of casual staff employed annually (Beef Industry)

	Total Beef Industry
Sample size (unweighted) n=	n=256
Casual staff	
<b>Nett 1 or more (% ANY)</b>	<b>37%</b>
0	63%
1	13%
2	12%
3	5%
More than 3	7%
Mean	1.0
Median	0

Q3a. And what about casual/seasonal staff on an annual basis? RECORD NUMBER 0 - 999 (Base: Total Beef industry n=256)

Table 35: Casual labour roles (Beef Industry)

	Total Beef Industry		Total Beef Industry
Sample size (unweighted) n=	n=256		n=256
Most common roles		Least common roles	
Stockwork incl. mustering, cattlework, branding, husbandry, feeding stock*	19%	Harvesting	1%
Manual/ general labour/various jobs	15%	Spraying	1%
Fencing	8%	Picking	1%
Transportation/Driving, i.e. operating tractors, forklifts, farm vehicles	4%	Customer service incl. sales, retail*	1%
Vegetation management incl. weeding, thinning, mowing, watering, pruning, garden maintenance etc*	2%	Repairs and maintenance*	1%
Machinery operation	2%	Other	2%
Not applicable - do not employ casual labour (63%)			

Q3b. What does your casual labour do for you? DO NOT READ OUT. MR. (Base: Total Beef industry n=256)

\* Response option added to pre-existing codeframe - coded up from 'other (specify)' verbatims

#### 4.1.3. Contractor supply.

Table 36: Use of contractors (Beef Industry)

	Total Beef Industry		Total Beef Industry
Sample size (unweighted) n=	n=256		n=256
Use of contractors (Q4a)		Contractor roles (Q4c)	
Yes	52%	Stockwork*	17%
No	48%	Manual/ general labour	13%
Number of contractors (Q4b)		Fencing	11%
0	47%	Transportation/Driving	10%
1	21%	Harvesting	7%
2	13%	Machinery operator/maintenance	6%
3	8%	Spraying	5%
More than 3	11%	Vegetation management*	4%
Mean	1.5	Planting	3%
Median	1	Shearing	2%
		Build modules	1%
		Other	3%
		Not applicable (do not employ contractors)	48%

Q4a. Do you use contractors on a semi-regular or regular basis? IF REQUIRED: not just a once off need or specialist need (Base: Total Beef industry n=256)

Q4b How many contractors do you use? RECORD NUMBER 0-999 (Base: Total Beef industry n=256)

Q4c. What do your contractors do for you? DO NOT READ OUT. MR (Base: As shown)

\* Response option added to pre-existing codeframe - coded up from 'other (specify)' verbatims

#### 4.1.4. Employment positions.

Table 37: Position descriptions occupied (Beef Industry)

	Number of businesses with staff in particular position descriptions	Number of employees in each position description							
		0	1	2	3	More than 3	TOTAL	Mean	Median
Owner / manager	<b>94%</b>	6%	24%	55%	8%	8%	100%	1.9	2
Farm worker / farm hand	<b>35%</b>	65%	13%	9%	6%	7%	100%	1.0	0
Stockman	<b>22%</b>	78%	7%	7%	1%	7%	100%	0.7	0
Machinery operator / maintenance	<b>21%</b>	79%	14%	4%	1%	2%	100%	0.4	0
Office manager / administration	<b>19%</b>	81%	16%	2%	0%	0%	100%	0.2	0
Labourer (including pickers)	<b>12%</b>	88%	5%	0%	4%	4%	100%	0.4	0
Supervisor	<b>9%</b>	91%	6%	2%	0%	1%	100%	0.1	0
Technical specialist	<b>4%</b>	96%	2%	1%	0%	1%	100%	0.1	0
QA / marketing / sales	<b>4%</b>	96%	4%	0%	0%	0%	100%	0.1	0
Packing shed worker	<b>0%</b>	100%	0%	0%	0%	0%	100%	0.0	0
Other	<b>5%</b>	95%	3%	1%	0%	1%	100%	0.1	0

Q5a. Can you indicate how many employees you have using each of the following position descriptions?

READ OUT. (Base: Total Beef industry n=256)

Q5a. Can you indicate how many employees you have using each of the following position descriptions?

READ OUT. (Base: Total Beef industry n=256)

Table 38: Types of roles versus type of employment (Beef Industry)

	Type of employment					TOTAL
	Full time	Part time	Casual / seasonal	Contractor	Not applicable (do not employ staff in these roles)	
Owner / manager	82%	20%	2%	0%	6%	100%
Farm worker / farm hand	19%	5%	13%	2%	65%	100%
Stockman	10%	4%	7%	2%	78%	100%
Office manager / administration	9%	7%	2%	0%	81%	100%
Supervisor	7%	2%	0%	0%	91%	100%
Machinery operator / maintenance	6%	5%	4%	5%	79%	100%
Labourer (including pickers)	4%	2%	7%	1%	88%	100%
Technical specialist	1%	0%	1%	2%	96%	100%
QA / marketing / sales	1%	2%	1%	0%	96%	100%
Other	1%	1%	2%	2%	95%	100%
Packing shed worker	0%	0%	0%	0%	100%	100%

Q5b. And do these roles tend to be full time, part time, casual or contractor positions? READ OUT. MR.

(Base: Total Beef industry n=256)

#### 4.1.5. Changes in staffing.

Table 39: Type and number of staffing changes in past 12 months (Beef Industry)

	Nett 1 or more (% businesses with ANY change of this nature)	Number of staff							
		0	1	2	3	More than 3	TOTAL	Mean	Median
How many staff would you have lost where they have voluntarily left	<b>14%</b>	86%	6%	3%	1%	4%	100%	0.4	0
How many new staff have you employed to replace staff losses	<b>12%</b>	88%	6%	2%	1%	3%	100%	0.4	0
How many new staff have you employed in addition to your existing workforce	<b>7%</b>	93%	4%	2%	1%	1%	100%	0.1	0
How many Staff have you had to make redundant or terminate their employment	<b>6%</b>	94%	3%	3%	0%	0%	100%	0.1	0

Q6a(a). Over the past 12 months, how many... READ OUT. (Base: Total Beef industry n=256)

Table 40: Reasons for redundancies or employment termination over past 12 months (Beef Industry)

	Total Beef Industry
Sample size (unweighted) n=	n=256
Lack of performance	3%
Business being down	2%
Due to drought	2%
Other	0%
Not applicable (no staff made redundant or terminated)	94%

Q6a(b). And was this due to.... READ OUT. MR. (Base: Total Beef industry n=256)

Table 41: New staff (Beef Industry)

	Total Beef Industry		Total Beef Industry
Sample size (unweighted) n=	n=256		n=256
New staff roles (Q6b)		How new staff are sourced (Q7)	
Farm worker / farm hand	9%	Through a contact/ friend/ family member (incl. word of mouth)	64%
Labourer (including pickers)	4%	Do not source/look for staff*	23%
Stockman	4%	Newspaper ads	11%
Machinery operator / maintenance	2%	Online job ads	10%
Sales / marketing / retail personnel	1%	Recruitment company	2%
Office manager / administration	1%	Labour hire company	2%
Not applicable (no new staff)	83%	Contractors used on a regular basis**	2%
		Ads on bulletin boards/around town	2%
		Facebook	2%
		Backpacker lodgings	1%
		Walk-bys	1%
		Through the unis/TAFEs/accreditation courses/other education	1%
		Ads on-site e.g. sign on gate/window	1%
		Other	0%

Q6b. With those new staff you employed within the last 12 months, what position descriptions were they filling? DO NOT READ OUT. MR (Base: Total Beef industry n=256)

Q7. How do you currently source staff? DO NOT READ OUT. MR. (Base: Total Beef industry n=256)

\* Response option added to pre-existing codeframe - coded up from 'other (specify)' verbatims

#### 4.1.6. Current employment vacancies.

Table 42: Current employment vacancies (Beef Industry)

	Total Beef Industry		Total Beef Industry
Sample size (unweighted) n=	n=256		n=256
Current employment vacancies (Q8a)		Positions currently vacant (Q8b)	
Yes	7%	Farm worker / farm hand	2%
No	93%	Labourer (including pickers)	3%
		Machinery operator / maintenance	2%
		Stockman	2%
		Other	2%
		Machinery operator / maintenance	2%

Q8a. Do you have any current vacancy gaps? (Base: Total Beef industry n=256)

Q8b. And what position descriptions are those vacancies for? DO NOT READ OUT. MR (Base: Total Beef industry n=256)

#### 4.1.7. Skills shortages.

Table 43: Skills shortages (Beef Industry)

	Total Beef Industry		Business owners & Managers in Total Beef Industry
Sample size (unweighted) n=	n=256		n=245
Types of skills shortages (entire workforce) (Q9a)		Skills shortages amongst owners and managers (Q9b)*	
No skills missing	84%	No / nothing	67%
Machinery skills	4%	IT / Computer skills	12%
Strong work ethic	3%	Accounting / book keeping	8%
Stock knowledge	2%	Business management	7%
Previous farm/horticulture experience	2%	Technical skills / Technology	3%
IT / computer literacy	1%	Machinery skills	3%
Positive attitude	1%	Financial management	2%
Appropriate licence to operate	1%	Managerial skills	2%
Good experienced workers	1%	Animal health	2%
Accounting / finance	1%	Office admin skills	1%
Machinery operators	1%	BMP Accredited	1%
Fencing	1%	Marketing / sales skills	1%
Other	1%	Drivers licences	1%
		Other	2%

Q9a. Are there particular skills missing in your workforce? DO NOT READ OUT. MR. (Base: Total Beef industry n=256)

Q9b. As an owner or manager of the business, are there any particular skills you would like to improve on or have? RECORD VERBATIM (Base: Business owners and managers in the Beef industry n=245)

\* This question was open-ended capturing full verbatims. Verbatims have been coded into themes as shown above.

#### 4.1.8. Retirement and business succession.

Table 44: Retirement and business succession (Beef Industry)

	Business owners or managers in the Beef industry		Business owners or managers in the Beef industry planning to retire in next 5-10 years
Sample size (unweighted) n=	n=245		n=119
Plans to retire in next 5-10 years - owners/managers only (Q9c)		Succession plans post-retirement (Q9d)	
Yes	49%	Yes	52%
No	47%	No	48%
Don't know	2%	Ease of succession planning (Q9e)	
Undecided	2%	Yes	39%
		No	54%
		Don't know	4%
		Haven't considered yet	3%

Q9c. Are you planning on retiring in the next 5 to 10 years? (Base: Business owners or managers in the Beef industry n=245)

Q9d. Do you have a succession plan in place? (Base: Business owners and managers in the Beef industry planning to retire in next 5-10 years n=119)

Q9e. Do you find succession planning difficult? DO NOT READ OUT. SR (Base: Business owners and managers in the Beef industry planning to retire in next 5-10 years n=119)



#### 4.1.9. Qualifications and training.

Table 45: Qualifications and Training (Beef Industry)

	Total Beef Industry		Total Beef Industry
Sample size (unweighted) n=	n=256		n=256
Preference for staff with Certificate 2 and above qualifications (Q10a)		Impediments to training (Q10c)	
Yes	13%	Cost	24%
No	82%	Time commitment	17%
Don't know	5%	Accessibility - distance to facilities	17%
Preferred delivery method for workforce training (Q10b)		Staff motivation	6%
Field days	31%	Attitude incl: finding the right people who willing to learn	4%
Participating in workshops or classes	17%	Limited information on course content / options	4%
Hands on / on-site training	16%	Availability of courses	3%
By any means	6%	Lack of practical skills / experience on farm	3%
Face to face training / face to face	5%	Decline in the industry / lack of job	3%
Nothing / no training necessary	4%	Lack of interest from young people	3%
Participating in online courses	3%	Don't need more staff / don't need training	3%
College / TAFE	2%	Hard work - low wages	3%
Don't know	16%	Government rules and legislations incl: WH&S / employment red tape	2%
		Availability of skilled trainers	2%
		Lost productivity / covering staff for training	2%
		Continuity of staff commitment	1%
		Lack of government support / funds	1%
		Accessibility - online connectivity	1%
		Other	1%
		Don't know	30%
		Nothing	3%

Q10a. Is there a preference to employee staff with certificate 2 and above qualifications? DO NOT READ OUT. SR (Base: Total Beef industry n=256)

Q10b. What is your preferred delivery method for workforce training – e.g. face to face classes, online courses etc? DO NOT READ OUT. SR. (Base: Total Beef industry n=256)

Q10c. What, if anything, inhibits the training of staff in your industry? DO NOT READ OUT. MR (Base: Total Beef industry n=256)

#### 4.1.10. Migrant workers.

Table 46: Use of migrant workers (Beef Industry)

	Total Beef Industry		Businesses in the Beef Industry who have employed migrants (ever)
Sample size (unweighted) n=	n=256		n=38
Prior use of migrant workers (Q12a)		Recruitment sources (Q12d)	
Yes	15%	Online job ads	37%
No	85%	Through a contact/ friend/ family member	26%
Number of migrant workers employed in past 12 months (Q12b)		Recruitment company	13%
0	93%	Backpacker lodgings	13%
1	2%	Walk-bys	11%
2	2%	Labour hire company	5%
3	1%	Ads on-site e.g. sign on gate/window	5%
More than 3	2%	Newspaper ads	3%
Mean	0.2	Ads on bulletin boards/around town	3%
Median	0	Other (specify)	8%
Positions occupied by migrant workers (Q12c)			
Labourer (including pickers)	8%		
Farm worker / farm hand	8%		
Stockman	2%		
Other	1%		
Not applicable (none ever employed)	85%		

Q12a. Have you ever employed migrant workers? (Base: Total Beef industry n=256)

Q12b. How many migrant workers would you have hired in the past 12 months? RECORD NUMBER 0-999 (Base: Total Beef industry n=256)

Q12c. What jobs do these migrant workers do? DO NOT READ OUT. MR (Base: Total Beef industry n=256)

Q12d. How do you find these migrant workers? DO NOT READ OUT. MR (Base: Businesses in the Beef industry who have employed migrant workers in the past n=38)

#### 4.1.11. Looking forward – employment numbers.

Table 47: Staff numbers in the next 2 years (Beef Industry)

	Nett 1 or more (% businesses likely to have ANY of these staff)	Number of staff							
		0	1	2	3	More than 3	TOTAL	Mean	Median
Full time	18%	82%	7%	6%	1%	4%	100%	0.5	0
Part time	11%	89%	6%	3%	0%	2%	100%	0.2	0
Casual	25%	75%	9%	8%	3%	6%	100%	0.7	0
Contract	29%	71%	8%	10%	2%	9%	100%	1.0	0

Q11. How many people do you envisage employing full time, part time, casual or contract in the next 2 years? (Base: Total Beef industry, excluding those who indicated don't know minimum n=250)

\* NOTE: A small proportion of respondents indicated don't know to this question (3% or less). These responses are excluded from the charts above.

Table 48: Sample profile (Beef Industry)

Demographic	%	Demographic	%
Industry*		Employment status (SC5)	
<b>Industry represented in survey (quota)</b>		I am the sole or joint owner	88%
Beef - intensive or pastoral combined	100%	I am a manager	8%
- Pastoral	80%	I am an employee	4%
- Intensive	20%	<b>Business role (SC3a)</b>	
<b>Top primary revenue stream (SC4A)</b>		A primary producer	96%
Beef – pastoral/intensive	98%	A supplier to primary producers	4%
Other	2%	<b>Location (SC6)</b>	
<b>Top secondary revenue streams (SC4B)</b>		South-East Queensland	11%
None	57%	Other	89%
Grain and feed	9%	<b>Business type (Q13)</b>	
Beef – pastoral/intensive	13%	Family owned business	98%
<b>Length of operation (Q15)</b>		Corporate business	2%
Less than 5 years	3%	<b>Annual turnover (Q14)</b>	
Between 5 - 10 years	6%	Less than \$1 million	75%
Between 10 - 20 years	16%	\$1 million to \$4.9 million	14%
Between 20 - 50 years	47%	\$5 million to \$19.9 million	1%
More than 50 years	29%	\$20 million and over	0%
		Refused/Don't know	9%

SC3a. And is the business...? READ OUT. SR

SC4a. Which industry sector does the business generate its primary stream of income from? DO NOT READ OUT. SR

SC4b. Which industry sector, if any, does the business generate its secondary stream of income from? DO NOT READ OUT. SR

SC5. Which of the following best describes your employment status within the business? READ OUT. SR

SC6. And what is the postcode of the businesses main site in Queensland?

Q13 Is your business a...? READ OUT (SR)

Q14 What is the annual turnover of the business? READ OUT. SR

Q15. How long has the business been in operation? DO NOT READ OUT (SR)

Base: Total Beef industry (n=256)

#### 4.1.12. Changes in employment over time (Beef Industry)

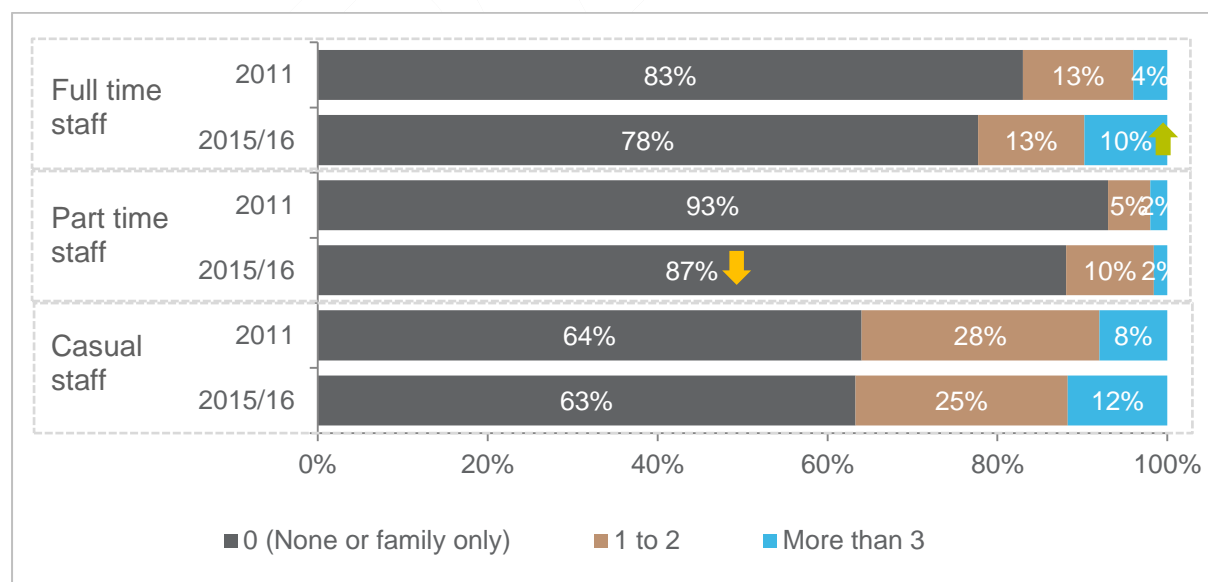
In 2011, Colmar Brunton conducted Primary Industry Profiles research for Department of Employment, Economic Development and Innovation. Between the 24th of November and the 19th of December 2011, Colmar Brunton conducted a Queensland study into a number of agricultural industries, one of which was Beef. The purpose of this research was to determine, for each industry:

- A business and employee profile;
- The skills and knowledge required in the industry;
- Trends in recruitment; and
- Major factors that would impact the industry in next 5-10 years and how this would affect the skills requirement.

This section focusses on comparing the results of the current research for the Queensland Farmers' Federation (QFF) on behalf of the RJSA against the results of the previous research for the Department of Employment, Economic Development and Innovation where possible. **The questionnaire was not identical in both studies, thus results from just a selection of questions can be compared.**

Figure 32 compares the number of full time, part time and casual staff members employed in each year of the research. There appears to be slightly more full time or part time casual staff members employed in the Beef Industry in 2015/16 compared to 2011.

Figure 31 Trend data: Number of full time, part time and casual staff (Beef Industry)

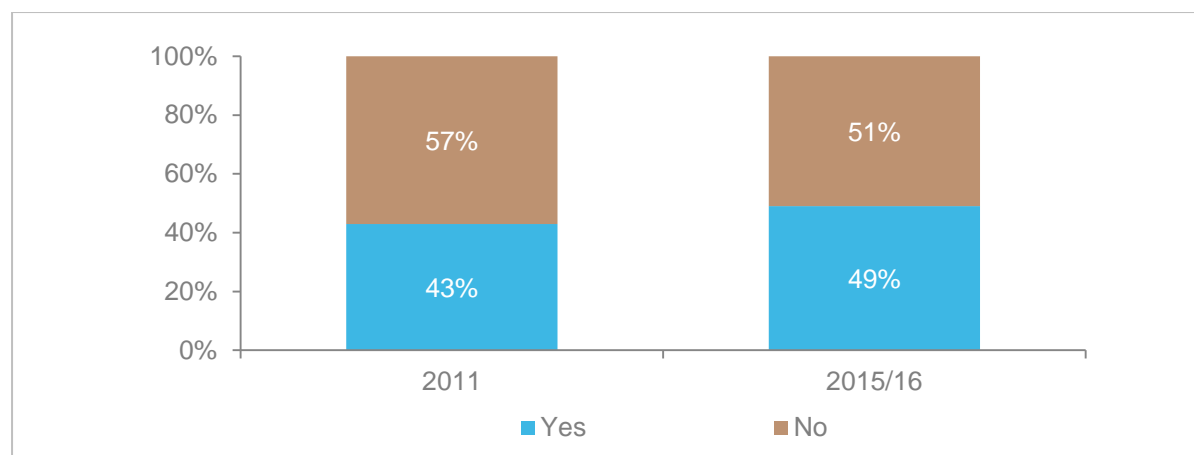


2011: Q2/3/4. Excluding yourself and any family members, how many full time/part time/casual staff do you employ? (n=150)

2015/16: Q1/Q2/Q3a. Excluding yourself and any family members, how many full time/part time/casual staff do you employ? RECORD NUMBER 0 - 999 (Base: Total Beef Industry n=256)

Figure 33 compares whether contractors were employed in each year of the research. There has been a slight increase in the employment of contractors, increasing from 43% in 2011 to 49% in 2015/16.

Figure 32 Trend data: Employ contractors (Beef Industry)

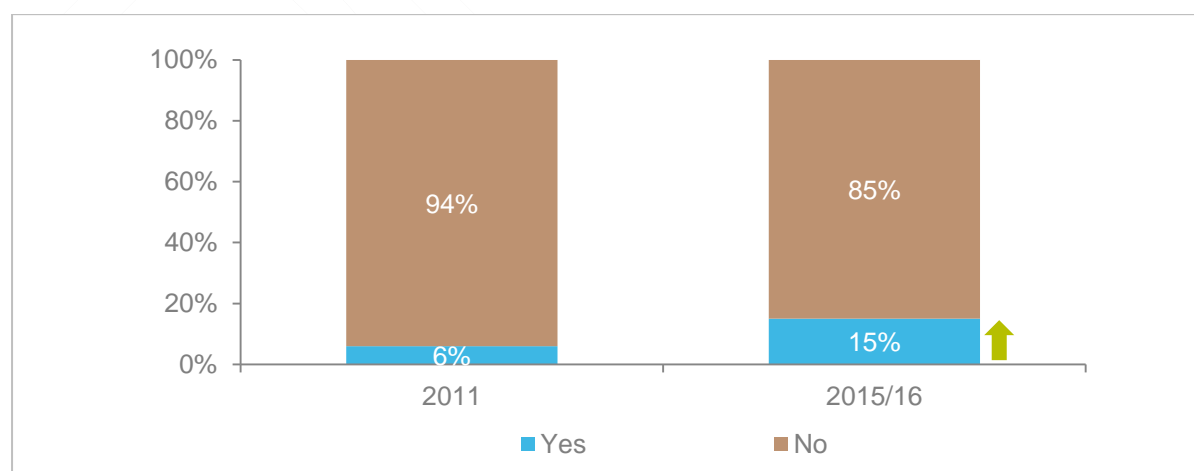


2011: Q5a. Do you use contractors on a semi-regular or regular basis? (Base: Total Beef Industry n=150)

Q4a. Do you use contractors on a semi-regular or regular basis? IF REQUIRED: not just a once off need or specialist need (Base: Total Beef Industry n=256)

Figure 34 compares whether migrants had ever been employed in each year of the research. The incidence of this within the Beef industry has increased from 6% in 2011 to 15% in 2015/16.

Figure 33 Trend data: Employ migrant workers (Beef Industry)

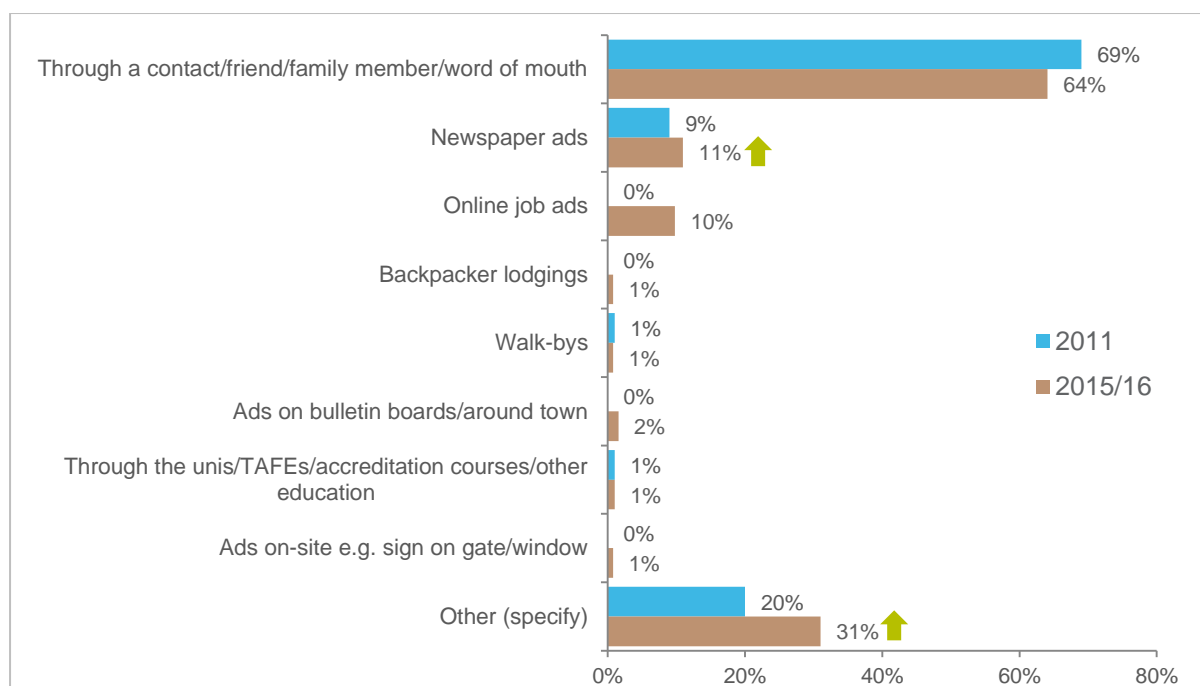


2011: Q11b. Have you ever employed migrant workers? (Base: Total Beef Industry n=150)

2015/16: Q12a. Have you ever employed migrant workers? (Base: Total Beef Industry n=256)

Figure 35 compares the recruitment sources used in each year of the research. In both years informal contacts through a contact, friend, family member or word-of-mouth are by far the most common source and this remains relatively consistent (69% in 2011, 64% in 2013/14). Newspaper ads remain the second most common source (9% 2011, 11% 2015/16).

Figure 34 Trend data: Recruitment sources (Beef Industry)



2011: Q10. How do you currently source staff? (Total Beef Industry n=150)

2015/16: Q7. How do you currently source staff? DO NOT READ OUT. MR. (Base: Total Beef Industry n=256)

\* The 'Other' category included mostly people saying they did not need to recruit

Representatives of the Beef industry were asked in both 2011 and 2015/16 to forecast the number of staff they were likely to employ on a full time, part time, casual or contractor basis in the next two years. Figure 36 shows the proportion of businesses likely to employ *any* staff of this nature, while Figure 37 shows a detailed breakdown of the predicted numbers.

The results are more positive in 2015/16, with anticipated staff numbers forecasted to be higher in comparison to 2011 for all job types.

Figure 35 Trend data: Staff numbers in the next 2 years – Nett Any (Beef Industry)

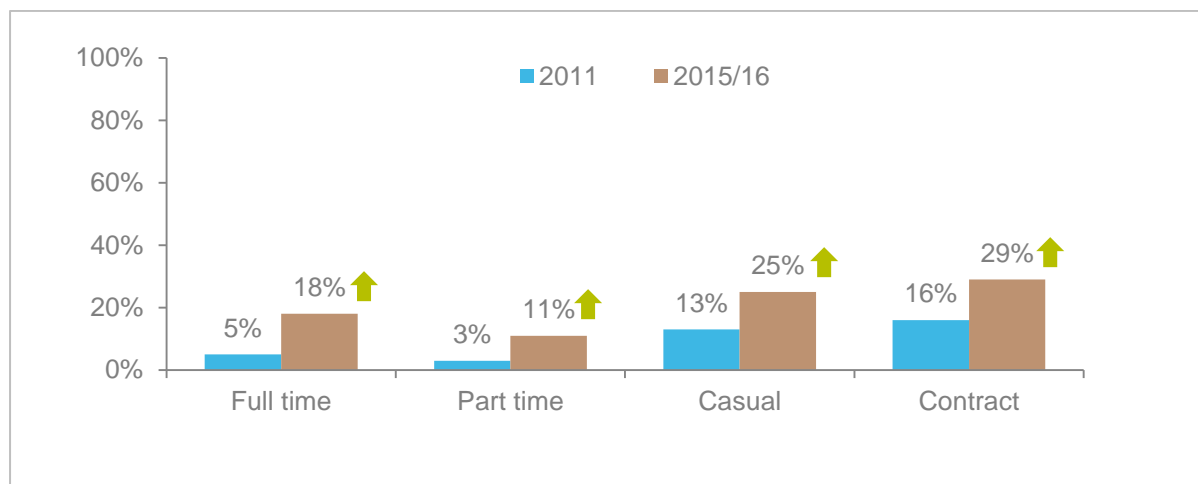
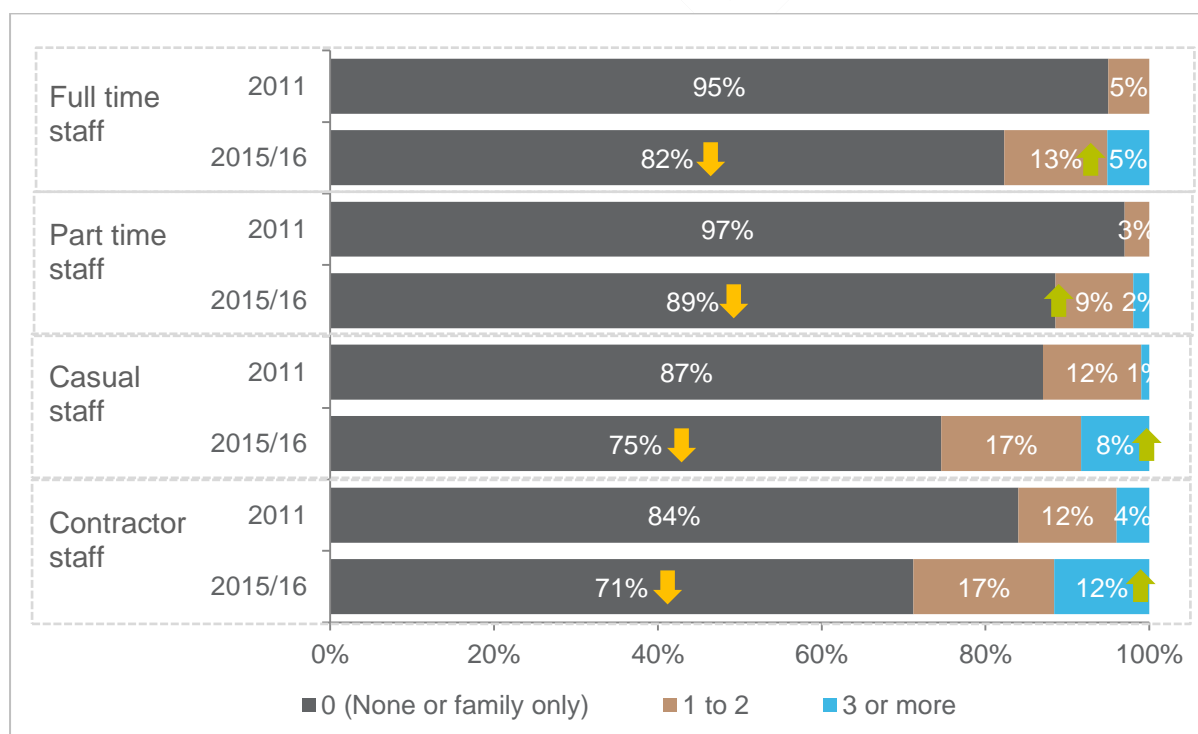


Figure 36 Trend data: Staff numbers in the next 2 years – Detailed breakdown (Beef Industry)



2011: Q6. How many do you envisage employing full time, part time, casual or contract in the next 2 years? (Base: Total Beef Industry n=150)

2015/16: Q11. How many people do you envisage employing full time, part time, casual or contract in the next 2 years? (Base: Total Beef industry, excluding those who indicated don't know minimum n=250)

\* NOTE: A small proportion of respondents indicated don't know to this question (3% or less). These responses are excluded from the charts above.