

4.2. Cotton.

4.2.1. Number of full time and part time staff.

Table 49: Number of full time and part time staff (Cotton 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	71%	29%	24%	11%	9%	27%	100%	5.2	1
Part time staff	41%	59%	16%	10%	3%	13%	100%	1.4	0

Q1. Excluding yourself and any family members, how many full time staff do you employ? RECORD NUMBER 0 - 999 (Base: Total Cotton industry n=70)

Q2. Again excluding yourself and any family members, how many part time staff do you employ? RECORD NUMBER 0 - 999 (Base: Total Cotton industry n=70)

4.2.2. Use of casual labour.

Table 50: Number of casual staff employed annually (Cotton Industry)

	Total Cotton Industry
Sample size (unweighted) n=	n=70
Casual staff	
Nett 1 or more (% ANY)	74%
0	26%
1	13%
2	17%
3	11%
More than 3	33%
Mean	7.9
Median	3

Q3a. And what about casual/seasonal staff on an annual basis? RECORD NUMBER 0 - 999 (Base: Total Cotton industry n=70)

Table 51: Casual labour roles (Cotton Industry)

	Total Cotton Industry		Total Cotton Industry
Sample size (unweighted) n=	n=70		n=70
Most common roles		Least common roles	
Harvesting	41%	Stockwork incl. mustering, cattlework, branding, husbandry, feeding stock*	3%
Picking	19%	Fencing	1%
Manual/ general labour/various jobs	13%	Fencing	1%
Transportation/Driving, i.e. operating tractors, forklifts, farm vehicles	13%	Spraying	1%
Machinery operation	13%	Shearing	1%
Irrigation	9%	Packing*	1%
Planting	7%	Other	3%
Not applicable - do not employ casual labour (26%)			

Q3b. What does your casual labour do for you? DO NOT READ OUT. MR. (Base: Total Cotton industry n=70)

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

4.2.3. Contractor supply.

Table 52: Use of contractors (Cotton Industry)

	Total Cotton Industry		Total Cotton Industry
Sample size (unweighted) n=	n=70		n=70
Use of contractors (Q4a)		Contractor roles (Q4c)	
Yes	69%	Harvesting	43%
No	31%	Spraying	27%
Number of contractors (Q4b)		Picking	23%
0	31%	Transportation	11%
1	24%	Planting	7%
2	19%	Manual/ general labour	6%
3	9%	Machinery operator/maintenance	6%
More than 3	17%	Fencing	3%
Mean	2.6	Build modules	3%
Median	1	Irrigation	1%
		Other	4%
		Not applicable(do not employ contractors)	31%

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 Cotton industry n=70)

Q4b How many contractors do you use? RECORD NUMBER 0-999 (Base: Total Cotton industry n=70)

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

4.2.4. Employment positions.

Table 53: Position descriptions occupied (Cotton 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	100%	0%	20%	47%	14%	19%	100%	1.9	2
Farm worker / farm hand	79%	21%	21%	19%	10%	29%	100%	1.0	2
Office manager / administration	56%	44%	44%	7%	1%	3%	100%	0.2	1
Machinery operator / maintenance	49%	51%	14%	10%	9%	16%	100%	0.4	0
Labourer (including pickers)	44%	56%	4%	10%	9%	21%	100%	0.4	0
Supervisor	34%	66%	17%	6%	3%	9%	100%	0.1	0
Technical specialist	29%	71%	24%	4%	0%	0%	100%	0.1	0
QA / marketing / sales	14%	86%	11%	3%	0%	0%	100%	0.1	0
Stockman	9%	91%	1%	1%	3%	3%	100%	0.7	0
Packing shed worker	6%	94%	0%	0%	1%	4%	100%	0.0	0
Other	6%	94%	3%	0%	1%	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 Cotton industry n=70)

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

READ OUT. (Base: Total Cotton industry n=70)

Table 54: Types of roles versus type of employment (Cotton Industry)

	Type of employment					TOTAL
	Full time	Part time	Casual / seasonal	Contractor	Not applicable (do not employ staff in these roles)	
Owner / manager	96%	17%	4%	0%	0%	100%
Farm worker / farm hand	63%	7%	21%	1%	21%	100%
Machinery operator / maintenance	44%	9%	4%	1%	51%	100%
Supervisor	34%	0%	1%	0%	66%	100%
Office manager / administration	27%	24%	4%	0%	44%	100%
Labourer (including pickers)	10%	6%	34%	4%	56%	100%
QA / marketing / sales	10%	4%	0%	0%	86%	100%
Stockman	9%	0%	1%	0%	91%	100%
Technical specialist	7%	4%	0%	19%	71%	100%
Packing shed worker	4%	1%	4%	0%	94%	100%
Other	3%	0%	1%	1%	94%	100%

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

(Base: Total Cotton industry n=70)

4.2.5. Changes in staffing.

Table 55: Type and number of staffing changes in past 12 months (Cotton 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	40%	60%	20%	9%	4%	7%	100%	1.3	0
How many new staff have you employed in addition to your existing workforce	30%	70%	20%	3%	0%	7%	100%	0.7	0
How many new staff have you employed to replace staff losses	26%	74%	13%	9%	0%	4%	100%	3.4	0
How many Staff have you had to make redundant or terminate their employment	13%	87%	9%	0%	1%	3%	100%	0.3	0

Q6a(a). Over the past 12 months, how many... READ OUT. (Base: Total Cotton industry n=70)

Table 56: Reasons for redundancies or employment termination over past 12 months (Cotton Industry)

	Total Cotton Industry
Sample size (unweighted) n=	n=70
Lack of performance	9%
Business being down	1%
Due to drought	1%
Due to a change in business focus	1%
Other	1%
Not applicable (no staff made redundant or terminated)	87%

Q6a(b). And was this due to.... READ OUT. MR. (Base: Total Cotton industry n=70)

Table 57: New staff (Cotton Industry)

	Total Cotton Industry		Total Cotton Industry
Sample size (unweighted) n=	n=70		n=70
New staff roles (Q6b)		How new staff are sourced (Q7)	
Farm worker / farm hand	29%	Through a contact/ friend/ family member (incl. word of mouth)	64%
Machinery operator / maintenance	13%	Do not source/look for staff*	23%
Labourer (including pickers)	9%	Newspaper ads	11%
Stockman	3%	Online job ads	10%
Packing shed worker	1%	Recruitment company	2%
Office manager / administration	1%	Labour hire company	2%
Owner / manager	1%	Contractors used on a regular basis*	2%
Not applicable (no new staff)	54%	Ads on bulletin boards/around town	2%
<p>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 Cotton industry n=256)</p> <p>Q7. How do you currently source staff? DO NOT READ OUT. MR. (Base: Total Cotton industry n=70)</p> <p>* Response option added to pre-existing codeframe - coded up from 'other (specify)' verbatims</p>		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%

4.2.6. Current employment vacancies.

Table 58: Current employment vacancies (Cotton Industry)

	Total Cotton Industry		Total Cotton Industry
Sample size (unweighted) n=	n=70		n=70
Current employment vacancies (Q8a)		Positions currently vacant (Q8b)	
Yes	9%	Farm worker / farm hand	3%
No	91%	Machinery operator / maintenance	2%
		Stockman	2%
		Other	2%
		Not applicable (no gaps)	93%

Q8a. Do you have any current vacancy gaps? (Base: Total Cotton industry n=70)

Q8b. And what position descriptions are those vacancies for? DO NOT READ OUT. MR (Base: Total Cotton industry n=70)

4.2.7. Skills shortages.

Table 59: Skills shortages (Cotton Industry)

	Total Cotton Industry		Business owners & Managers in
Sample size (unweighted) n=	n=70		n=66
Types of skills shortages (entire workforce) (Q9a)		Skills shortages amongst owners and managers (Q9b)*	
No skills missing	67%	No / nothing	48%
IT / computer literacy	10%	IT / Computer skills	15%
Machinery skills - Mechanical skills incl: maintenance / welding / fabricator	6%	Marketing / sales skills	8%
Appropriate licence to operate	6%	Accounting / book keeping	6%
Marketing / sales	4%	Business management	6%
Machinery operators	3%	Technical skills / Technology	5%
Drivers incl: truck / forklift / tractors	3%	Financial management	3%
Irrigation operation skills	3%	Managerial skills incl: manager / supervisor	3%
Strong work ethic	1%	Office admin skills	3%
Previous farm/horticulture experience	1%	Agronomy	3%
Positive attitude	1%	Machinery skills incl: maintenance / welding / fabricator	2%
Farm hands / farm skills	1%	Drivers licences incl: truck / forklift / tractors	2%
Adequate English and math skills	1%	Better understanding of horticulture	2%
Managerial skills incl: manager / supervisor	1%	Other	3%
Good social / communication skills	1%		
Other	0%		

Q9a. Are there particular skills missing in your workforce? DO NOT READ OUT. MR. (Base: Total Cotton industry n=70)

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 Cotton industry n=66)

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

4.2.8. Retirement and business succession.

Table 60: Retirement and business succession (Cotton Industry)

	Business owners or managers in the Cotton industry		Business owners or managers in the Cotton industry planning to retire in next 5-10 years
Sample size (unweighted) n=	n=66		n=30
Plans to retire in next 5-10 years - owners/managers only (Q9c)		Succession plans post-retirement (Q9d)	
Yes	45%	Yes	60%
No	47%	No	40%
Don't know	0%	Ease of succession planning (Q9e)	
Undecided	8%	Yes	40%
		No	53%
		Don't know	7%
		Haven't considered yet	0%

Q9c. Are you planning on retiring in the next 5 to 10 years? (Base: Business owners or managers in the Cotton industry n=66)

Q9d. Do you have a succession plan in place? (Base: Business owners and managers in the Cotton industry planning to retire in next 5-10 years n=33)

Q9e. Do you find succession planning difficult? DO NOT READ OUT. SR (Base: Business owners and managers in the Cotton industry planning to retire in next 5-10 years n=33)

4.2.9. Qualifications and training.

Table 61: Qualifications and Training (Cotton Industry)

	Total Cotton Industry		Total Cotton Industry
Sample size (unweighted) n=	n=70		n=70
Preference for staff with Certificate 2 and above qualifications (Q10a)		Impediments to training (Q10c)	
Yes	27%	Availability of courses	9%
No	69%	Availability of courses	9%
Don't know	4%	Limited information on course content / options	6%
Preferred delivery method for workforce training (Q10b)		Limited information on course content / options	6%
Participating in workshops or classes	33%	Attitude incl: finding the right people who willing to learn	4%
Face to face training / face to face	27%	Attitude incl: finding the right people who willing to learn	4%
Field days	16%	Decline in the industry / lack of job	3%
Hands on / on-site training	14%	Don't need more staff / don't need training	3%
Participating in online courses	3%	Government rules and legislations incl: WH&S / employment red tape	3%
By any means	1%	Decline in the industry / lack of job	3%
Nothing / no training necessary	1%	Lack of practical skills / experience on farm	1%
Don't know	4%	Availability of skilled trainers	1%
		Hard work - low wages	1%
		Language barriers	1%
		Accessibility - online connectivity	1%
		Other	1%
		Don't know	13%
		Nothing	6%

Q10a. Is there a preference to employee staff with certificate 2 and above qualifications? DO NOT READ OUT. SR (Base: Total Cotton industry n=70)

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 Cotton industry n=70)

Q10c. What, if anything, inhibits the training of staff in your industry? DO NOT READ OUT. MR (Base: Total Cotton industry n=70)

4.2.10. Migrant workers.

Table 62: Use of migrant workers (Cotton Industry)

	Total Cotton Industry		Businesses in the Cotton Industry who have employed migrants (ever)
Sample size (unweighted) n=	n=70		n=29
Prior use of migrant workers (Q12a)		Recruitment sources (Q12d)	
Yes	15%	Online job ads	**
No	85%	Through a contact/ friend/ family member	**
Number of migrant workers employed in past 12 months (Q12b)		Recruitment company	**
0	93%	Backpacker lodgings	**
1	2%	Walk-bys	**
2	2%	Other	**
3	1%	Labour hire company	**
More than 3	2%	Newspaper ads	**
Mean	0.2	Newspaper ads	**
Median	0	Ads on-site e.g. sign on gate/window	**
Positions occupied by migrant workers (Q12c)		Ads on bulletin boards/around town	**
Farm worker / farm hand	26%	Other (specify)	**
Labourer (including pickers)	14%		
Machinery operator / maintenance	10%		
Other	6%		
Stockman	1%		
Not applicable (none ever employed)	59%		

Q12a. Have you ever employed migrant workers? (Base: Total Cotton industry n=70)

Q12b. How many migrant workers would you have hired in the past 12 months? RECORD NUMBER 0-999 (Base: Total Cotton industry n=70)

Q12c. What jobs do these migrant workers do? DO NOT READ OUT. MR (Base: Total Cotton industry n=70)

Q12d. How do you find these migrant workers? DO NOT READ OUT. MR (Base: Businesses in the Cotton industry who have employed migrant workers in the past n=29)

**Sample size <n=30. Results are not shown due to small sample size – results are unreliable.

4.2.11. Looking forward – employment numbers.

Table 63: Staff numbers in the next 2 years (Cotton 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	53%	47%	22%	9%	9%	13%	100%	2.9	1
Part time	26%	74%	16%	6%	1%	3%	100%	0.5	0
Casual	45%	55%	13%	6%	4%	22%	100%	4.8	0
Contract	29%	71%	13%	4%	4%	7%	100%	1.2	0

Q11. How many people do you envisage employing full time, part time, casual or contract in the next 2 years? (Base: Total Cotton industry, excluding those who indicated don't know minimum n=68)

* 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 64: Sample profile (Cotton Industry)

Demographic	%	Demographic	%
Industry*		Employment status (SC5)	
Industry represented in survey (quota)		I am the sole or joint owner	86%
Cotton	100%	I am a manager	9%
Top primary revenue stream (SC4A)		I am an employee	6%
Cotton	93%	Business role (SC3a)	
Grain and feed	6%	A primary producer	97%
Beef - intensive	1%	A supplier to primary producers	3%
Top secondary revenue streams (SC4B)		Location (SC6)	
None	11%	South-East Queensland	0%
Grain and feed	61%	Other	100%
Production horticulture	9%	Business type (Q13)	
Beef - pastoral	9%	Family owned business	91%
Length of operation (Q15)		Corporate business	9%
Less than 5 years	1%	Annual turnover (Q14)	
Between 5 - 10 years	3%	Less than \$1 million	17%
Between 10 - 20 years	7%	\$1 million to \$4.9 million	59%
Between 20 - 50 years	71%	\$5 million to \$19.9 million	6%
More than 50 years	17%	\$20 million and over	10%
		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 Cotton industry (n=70)

4.2.12. Changes in employment over time (Cotton Industry)

In 2013, Colmar Brunton conducted research for the Department of Agriculture, Forestry and Fisheries as per of the Industry Skills and Workforce Development Strategy development. One part of the strategy focused on identifying essential occupations and skills required for long term industry growth. Between the 25th of March and the 19th of April 2013, Colmar Brunton conducted a Queensland study into a number of agricultural industries, one of which was Cotton.

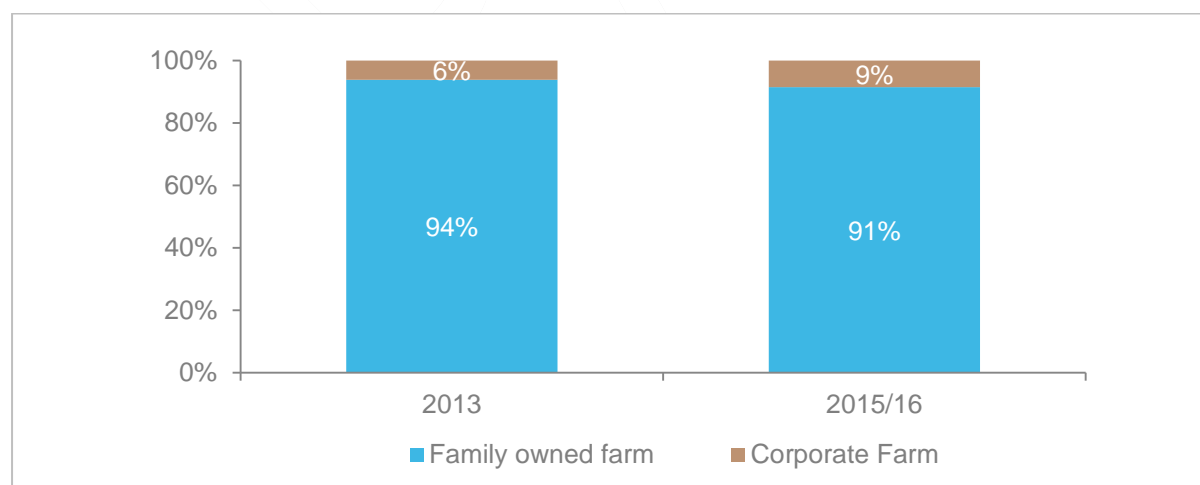
This section focusses on comparing the results of the current research for the Queensland Farmers' Federation (QFF) on behalf of the RJSA against the results of the previous research for the Department of Agriculture, Forestry and Fisheries where possible. **The questionnaire was not identical in both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

Data on the number of staff *currently* employed on a full time, part time or casual basis is unable to be compared between years due to the question being asked differently in each year i.e. in 2013 respondents were directed to include family members and the respondent themselves in the count, whereas in 2015 they were directed to exclude them.

Insights

Figure 38 below compares the proportion of family vs. corporate businesses in the Cotton Industry. There is little change in the profile over time, with just over 9 in 10 businesses being family-owned each year.

Figure 37 Trend data: Family vs. corporate businesses (Cotton Industry)

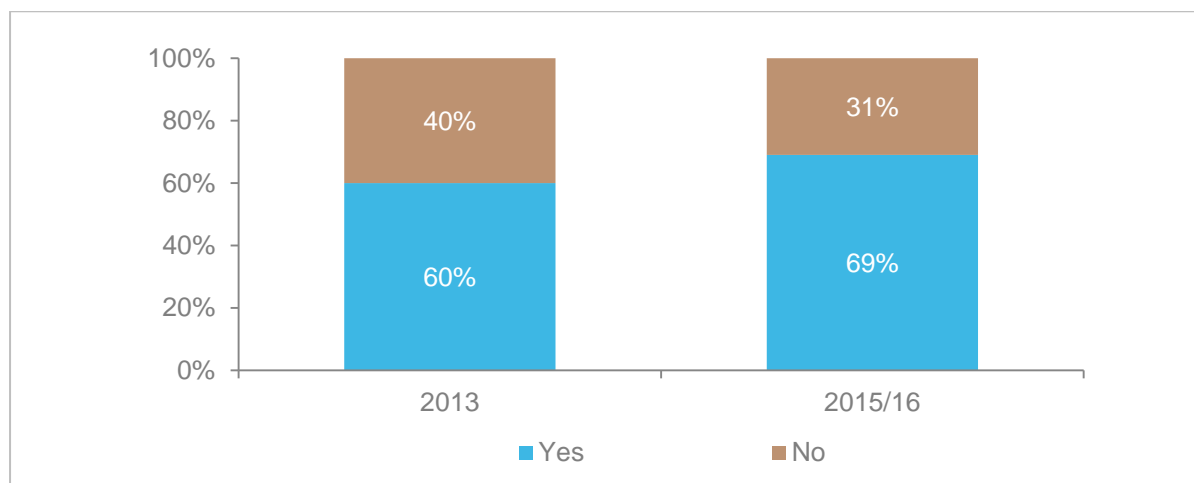


2013: Q18. Is your farm a family operated or corporate farm? (Base: Total Cotton Industry n=81)

2015/16: Q13 Is your business a...? READ OUT (SR) (Base: Total Cotton Industry n=70)

Representatives of the Cotton industry were asked whether they employed contractors (see Figure 39). In 2015/16 the proportion that employed contractors rose slightly from 60% to 69% (a 9 percentage point increase).

Figure 38 Trend data: Employ contractors (Cotton Industry)

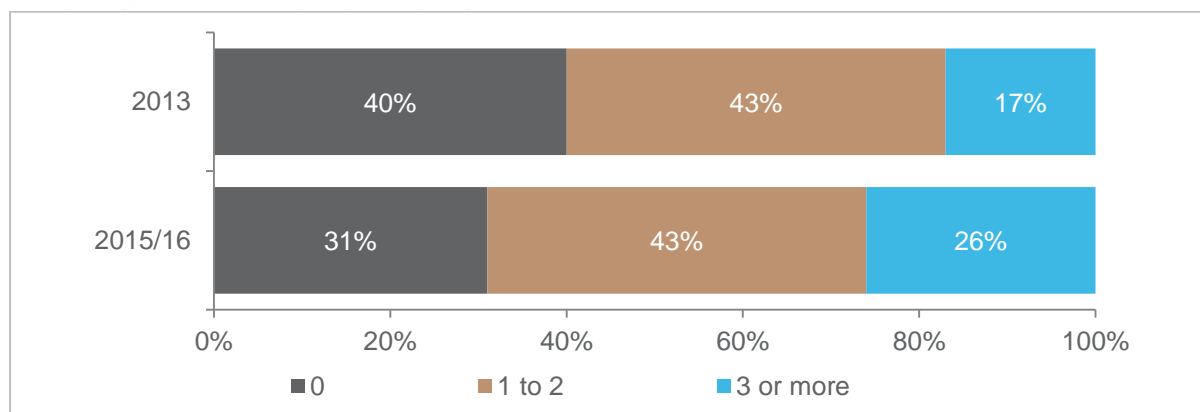


2013: Q5a. Do you use contractors on a semi-regular or regular basis? (Base: Total Cotton Industry n=81)

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 Cotton Industry n=70)

Representatives of the Cotton industry were also asked how many contractors they used (see Figure 40). Overall a marginal increase in the number of contractors was observed between years however the shift is not statistically significant.

Figure 39 Trend data: Number of contractors (Cotton Industry)



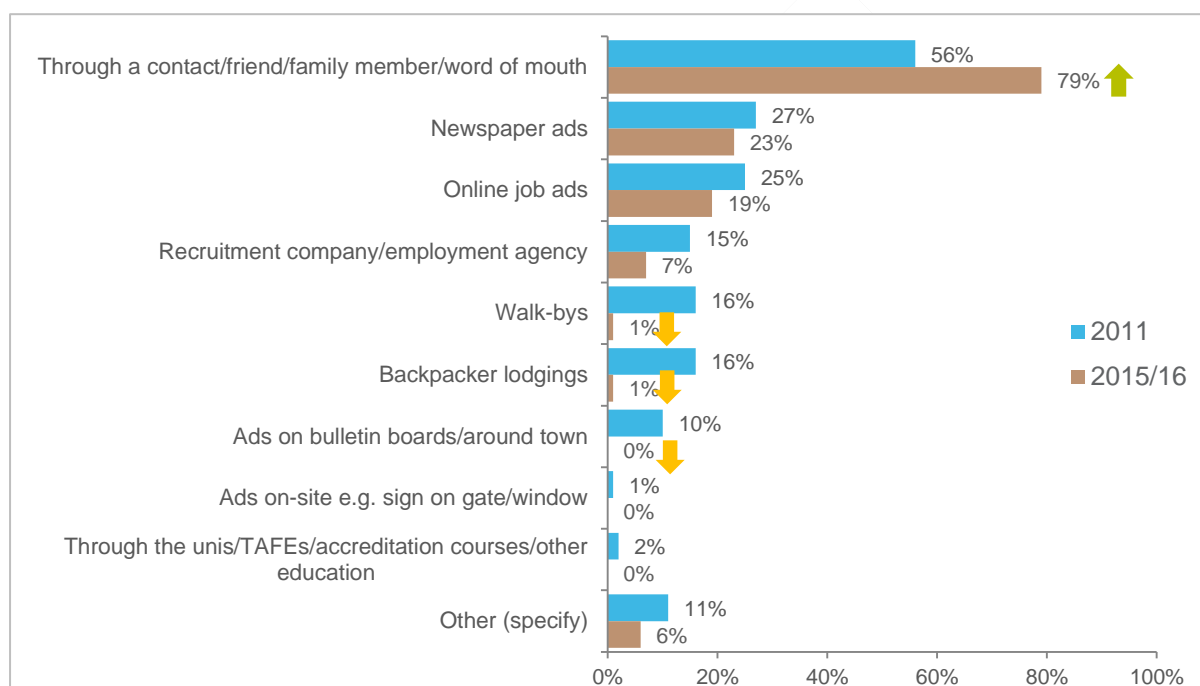
2013: Q5d How many contractors do you use? (Base: Total Cotton Industry n=81)

2015/16: Q4b How many contractors do you use? RECORD NUMBER 0-999 (Base: Total Cotton Industry n=70)

Representatives of the Cotton industry were asked how they currently sourced staff (see Figure 41). Comparing 2013 to 2015/16 results, sourcing staff via informal contacts such as friends, family members or word-of-mouth is the most common source in both years, however this year it was more commonly mentioned. Newspaper ads and online job ads are the second and third most common sources across both years.

The increase in recruitment via informal sources such as friends, family members and word-of-mouth this year has come at the expense of recruitment via walk-bys, backpacker lodgings and ads on bulletin boards around town.

Figure 40 Trend data: Recruitment sources (Cotton Industry)



2013: Q10. How do you currently source staff? (Total Cotton Industry n=81)

2015/16: Q7. How do you currently source staff? DO NOT READ OUT. MR. (Base: Total Cotton Industry n=70)

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

Representatives of the Cotton industry were asked in both 2013 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 42 shows the proportion of businesses likely to employ any staff of this nature, while Figure 43 shows a detailed breakdown of the predicted numbers.

The forecast in 2015/16 is slightly lower than in 2013 for all types of staff, except for full time staff where the forecast is significantly lower.

Figure 41 Trend data: Staff numbers in the next 2 years – Nett Any (Cotton Industry)

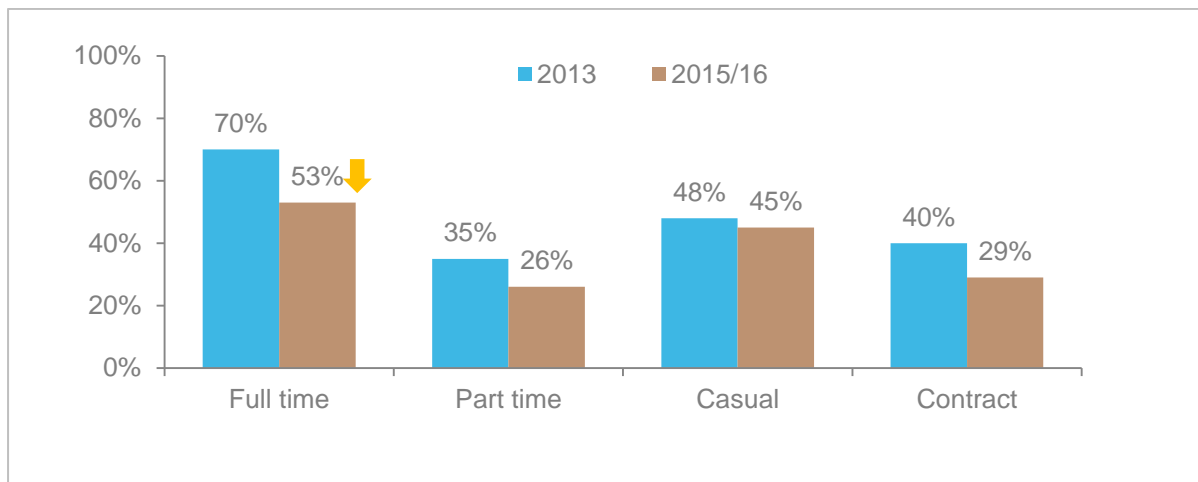
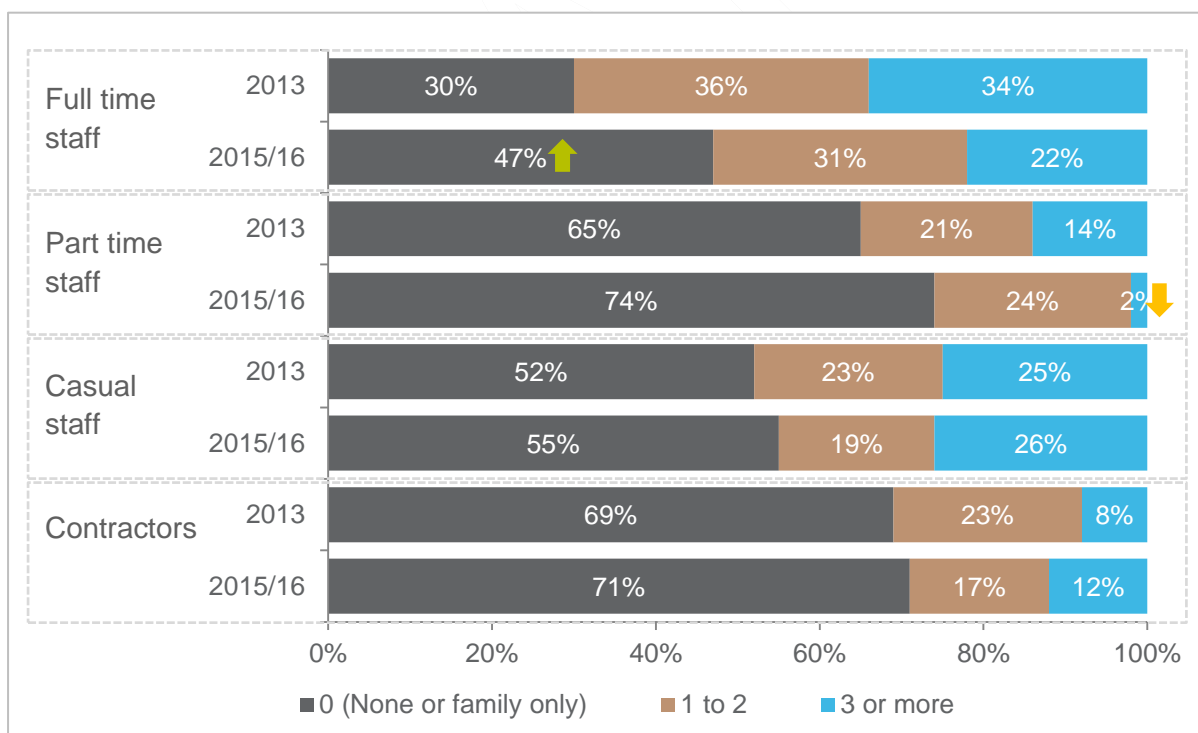


Figure 42 Trend data: Staff numbers in the next 2 years – Detailed breakdown (Cotton Industry)



Q6c. How many people do you envisage employing full time, part time, casual or contract in the next 2 years? (Total Cotton Industry n=81)

Q11. How many people do you envisage employing full time, part time, casual or contract in the next 2 years? (Base: Total Cotton industry, excluding those who indicated don't know minimum n=68)

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