

## 4.5. Production Horticulture.

### 4.5.1. Number of full time and part time staff.

Table 97: Number of full time and part time staff (Production Horticulture 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	<b>43%</b>	57%	9%	11%	5%	17%	100%	7.2	0
Part time staff	<b>23%</b>	77%	7%	8%	3%	5%	100%	1.9	0

Q1. Excluding yourself and any family members, how many full time staff do you employ? RECORD NUMBER 0 - 999 (Base: Total Production Horticulture industry n=149)

Q2. Again excluding yourself and any family members, how many part time staff do you employ? RECORD NUMBER 0 - 999 (Base: Total Production Horticulture industry n=149)

### 4.5.2. Use of casual labour.

Table 98: Number of casual staff employed annually (Production Horticulture Industry)

	Total Production Horticulture Industry
Sample size (unweighted) n=	n=149
Casual staff	
<b>Nett 1 or more (% ANY)</b>	<b>72%</b>
0	28%
1	4%
2	9%
3	4%
More than 3	55%
Mean	25.3
Median	5

Q3a. And what about casual/seasonal staff on an annual basis? RECORD NUMBER 0 - 999 (Base: Total Production Horticulture industry n=149)

Table 99: Casual labour roles (Production Horticulture Industry)

	Total Production Horticulture Industry		Total Production Horticulture Industry
Sample size (unweighted) n=	n=149		n=149
Most common roles		Least common roles	
Picking	40%	Sorting*	4%
Manual/ general labour/various jobs	30%	Customer service incl. sales, retail*	3%
Packing*	19%	Spraying	3%
Harvesting	15%	Irrigation	1%
Vegetation management incl. weeding, thinning, mowing, watering, pruning, garden maintenance etc *	12%	Stockwork incl. mustering, cattlework, branding, husbandry, feeding stock*	1%
Planting	9%	Fencing	1%
Transportation/Driving, i.e. operating tractors, forklifts, farm vehicles	5%	Repairs and maintenance*	1%
Machinery operation	4%	Other	3%
Not applicable - do not employ casual labour (28%)			

Q3b. What does your casual labour do for you? DO NOT READ OUT. MR. (Base: Total Production Horticulture industry n=149)

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

#### 4.5.3. Contractor supply.

Table 100: Use of contractors (Production Horticulture Industry)

	Total Production Horticulture Industry		Total Production Horticulture Industry
Sample size (unweighted) n=	n=149		n=149
Use of contractors (Q4a)		Contractor roles (Q4c)	
Yes	30%	Manual/ general labour	9%
No	70%	Harvesting	7%
Number of contractors (Q4b)		Machinery operator/maintenance	5%
0	70%	Picking	3%
1	14%	Transportation	3%
2	7%	Spraying	2%
3	3%	Irrigation	1%
More than 3	6%	Stockwork*	1%
Mean	0.8	Planting	1%
Median	0	Fencing	1%
		Repairs and maintenance*	1%
		Packing*	1%
		Other	9%
		Not applicable(do not employ contractors)	70%

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 Production Horticulture industry n=149)

Q4b How many contractors do you use? RECORD NUMBER 0-999 (Base: Total Production Horticulture industry n=149)

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

#### 4.5.4. Employment positions.

Table 101: Position descriptions occupied (Production Horticulture 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>99%</b>	1%	26%	48%	13%	13%	100%	1.9	2
Labourer (including pickers)	<b>58%</b>	42%	5%	5%	2%	46%	100%	0.4	2
Farm worker / farm hand	<b>50%</b>	50%	15%	9%	2%	23%	100%	1.0	0
Office manager / administration	<b>40%</b>	60%	30%	7%	1%	2%	100%	0.2	0
Supervisor	<b>38%</b>	62%	18%	9%	4%	7%	100%	0.1	0
Packing shed worker	<b>32%</b>	68%	3%	4%	3%	22%	100%	0.0	0
Machinery operator / maintenance	<b>29%</b>	71%	17%	7%	1%	5%	100%	0.4	0
QA / marketing / sales	<b>22%</b>	78%	16%	2%	0%	4%	100%	0.1	0
Technical specialist	<b>15%</b>	85%	9%	3%	1%	1%	100%	0.1	0
Other	<b>9%</b>	91%	3%	2%	0%	4%	100%	0.1	0
Stockman	<b>4%</b>	96%	3%	1%	0%	1%	100%	0.7	0

Q5a. Can you indicate how many employees you have using each of the following position descriptions?  
 READ OUT. (Base: Total Production Horticulture industry n=149)

Q5a. Can you indicate how many employees you have using each of the following position descriptions?  
 READ OUT. (Base: Total Production Horticulture industry n=149)

Table 102: Types of roles versus type of employment (Production Horticulture Industry)

	Type of employment					TOTAL
	Full time	Part time	Casual / seasonal	Contractor	Not applicable (do not employ staff in these roles)	
Owner / manager	89%	17%	5%	0%	1%	100%
Supervisor	26%	3%	11%	0%	62%	100%
Farm worker / farm hand	23%	11%	25%	1%	50%	100%
Office manager / administration	20%	14%	9%	2%	60%	100%
Machinery operator / maintenance	15%	3%	8%	5%	71%	100%
QA / marketing / sales	11%	5%	5%	2%	78%	100%
Labourer (including pickers)	9%	6%	46%	4%	42%	100%
Technical specialist	7%	1%	4%	4%	85%	100%
Packing shed worker	6%	3%	24%	2%	68%	100%
Stockman	3%	1%	1%	0%	96%	100%
Other	3%	3%	4%	1%	91%	100%

Q5b. And do these roles tend to be full time, part time, casual or contractor positions? READ OUT. MR.  
 (Base: Total Production Horticulture industry n=149)

#### 4.5.5. Changes in staffing.

Table 103: Type and number of staffing changes in past 12 months (Production Horticulture 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>41%</b>	59%	8%	4%	5%	24%	100%	13.6	0
How many new staff have you employed to replace staff losses	<b>34%</b>	66%	2%	6%	3%	23%	100%	12.4	0
How many new staff have you employed in addition to your existing workforce	<b>28%</b>	72%	7%	3%	2%	15%	100%	7.3	0
How many Staff have you had to make redundant or terminate their employment	<b>19%</b>	81%	6%	3%	1%	10%	100%	1.9	0

Q6a(a). Over the past 12 months, how many... READ OUT. (Base: Total Production Horticulture industry n=149)

Table 104: Reasons for redundancies or employment termination over past 12 months (Production Horticulture Industry)

	Total Production Horticulture Industry
Sample size (unweighted) n=	n=149
Lack of performance	12%
Seasonal demand for staff being over	5%
Business being down	2%
Other	1%
Not applicable (no staff made redundant or terminated)	81%

Q6a(b). And was this due to.... READ OUT. MR. (Base: Total Production Horticulture industry n=149)

Table 105: New staff (Production Horticulture Industry)

	Total Production Horticulture Industry		Total Production Horticulture Industry
Sample size (unweighted) n=	n=149		n=149
New staff roles (Q6b)		How new staff are sourced (Q7)	
Farm worker / farm hand	16%	Through a contact/ friend/ family member (incl. word of mouth)	46%
Labourer (including pickers)	27%	Backpacker lodgings	23%
Packing shed worker	10%	Recruitment company	15%
Machinery operator / maintenance	3%	Walk-bys	13%
Sales / marketing / retail personnel	2%	Newspaper ads	10%
Office manager / administration	1%	Do not source/look for staff*	10%
Owner / manager	1%	Labour hire company	9%
Supervisor	1%	Online job ads	5%
Technical specialist	1%	Contractors used on a regular basis*	2%
Other	3%	Ads on bulletin boards/around town	1%
Not applicable (no new staff)	56%	Through the unis/TAFEs/accreditation courses/other education	1%
<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 Production Horticulture Industry n=149)</p>		Cane Growers Association	1%
		Ads on-site e.g. sign on gate/window	1%
		Other	1%

Q7. How do you currently source staff? DO NOT READ OUT. MR. (Base: Total Production Horticulture Industry n=149)

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

#### 4.5.6. Current employment vacancies.

Table 106: Current employment vacancies (Production Horticulture Industry)

	Total Production Horticulture Industry		Total Production Horticulture Industry
Sample size (unweighted) n=	n=149		n=149
Current employment vacancies (Q8a)		Positions currently vacant (Q8b)	
Yes	13%	Farm worker / farm hand	5%
No	87%	Labourer (including pickers)	5%
<p>Q8a. Do you have any current vacancy gaps? (Base: Total Production Horticulture industry n=149)</p> <p>Q8b. And what position descriptions are those vacancies for? DO NOT READ OUT. MR (Base: Total Production Horticulture industry n=149)</p>		Machinery operator / maintenance	2%
		Office manager / administration	1%
		Packing shed worker	1%
		Supervisor	1%
		Other	1%
		Not applicable (no gaps)	87%

#### 4.5.7. Skills shortages.

Table 107: Skills shortages (Production Horticulture Industry)

	Total Production Horticulture Industry		Business owners & Managers in Total Production Horticulture Industry
Sample size (unweighted) n=	n=149		n=98
Types of skills shortages (entire workforce) (Q9a)		Skills shortages amongst owners and managers (Q9b)*	
No skills missing	72%	No / nothing	63%
Previous farm/horticulture experience	7%	IT / Computer skills	10%
Strong work ethic	5%	Accounting / book keeping	4%
Drivers incl: truck / forklift / tractors	4%	Business management	4%
IT / computer literacy	3%	Machinery skills incl: maintenance / welding / fabricator	4%
Positive attitude	3%	Animal health incl: animal husbandry / nutrition / pregnancy testing / veterinary skills	4%
Good experienced workers	3%	Marketing / sales skills	4%
A person with common sense	3%	Office admin skills	3%
Managerial skills incl: manager / supervisor	3%	Technical skills / Technology	2%
Machinery skills - Mechanical skills incl: maintenance / welding / fabricator	2%	Financial management	2%
Appropriate licence to operate	2%	Managerial skills incl: manager / supervisor	2%
Good social / communication skills	2%	Agronomy	1%
Marketing / sales	1%	Other	2%
Adequate English and math skills	1%		
Irrigation operation skills	1%		
Machinery operators	1%		
Farm hands / farm skills	1%		
Other	1%		

Q9a. Are there particular skills missing in your workforce? DO NOT READ OUT. MR. (Base: Total Production Horticulture industry n=149)

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 Production Horticulture industry n=98)

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

#### 4.5.8. Retirement and business succession.

Table 108: Retirement and business succession (Production Horticulture Industry)

	Business owners or managers in the Production Horticulture industry		Business owners or managers in the Production Horticulture industry planning to retire in next 5-10 years
Sample size (unweighted) n=	n=139		n=44
Plans to retire in next 5-10 years - owners/managers only (Q9c)		Succession plans post-retirement (Q9d)	
Yes	50%	Yes	40%
No	42%	No	60%
Don't know	4%	Ease of succession planning (Q9e)	
Undecided	4%	Yes	30%
		No	57%
		Don't know	4%
		Haven't considered yet	9%

Q9c. Are you planning on retiring in the next 5 to 10 years? (Base: Business owners or managers in the Production Horticulture industry n=98)

Q9d. Do you have a succession plan in place? (Base: Business owners and managers in the Production Horticulture industry planning to retire in next 5-10 years n=44)

Q9e. Do you find succession planning difficult? DO NOT READ OUT. SR (Base: Business owners and managers in the Production Horticulture industry planning to retire in next 5-10 years n=44)



#### 4.5.9. Qualifications and training.

Table 109: Qualifications and Training (Production Horticulture Industry)

	Total Production Horticulture Industry		Total Production Horticulture Industry
Sample size (unweighted) n=	n=149		n=149
Preference for staff with Certificate 2 and above qualifications (Q10a)		Impediments to training (Q10c)	
Yes	15%	Cost	12%
No	84%	Time commitment	14%
Don't know	1%	Nothing	9%
Preferred delivery method for workforce training (Q10b)		Attitude incl: finding the right people who willing to learn	7%
Field days	30%	Accessibility - distance to facilities	5%
Hands on / on-site training	26%	Staff motivation	5%
Participating in workshops or classes	20%	Language barriers	5%
Face to face training / face to face	9%	Don't need more staff / don't need training	4%
Participating in online courses	5%	Government rules and legislations incl: WH&S / employment red tape	4%
By any means	3%	Continuity of staff commitment	4%
Nothing / no training necessary	1%	Availability of courses	3%
College / TAFE	1%	Lack of practical skills / experience on farm	3%
Don't know	7%	Hard work - low wages	3%
		20%	2%
		Availability of skilled trainers	2%
		Lack of government support / funds	2%
		Decline in the industry / lack of job	1%
		Lack of interest from young people	1%
		Accessibility - online connectivity	1%
		Other	3%
		Don't know	23%

Q10a. Is there a preference to employee staff with certificate 2 and above qualifications? DO NOT READ OUT. SR (Base: Total Production Horticulture industry n=149)

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 Production Horticulture industry n=149)

Q10c. What, if anything, inhibits the training of staff in your industry? DO NOT READ OUT. MR (Base: Total Production Horticulture industry n=149)

#### 4.5.10. Migrant workers.

Table 110: Use of migrant workers (Production Horticulture Industry)

	Total Production Horticulture Industry		Businesses in the Production Horticulture Industry who have employed migrants (ever)
Sample size (unweighted) n=	n=149		n=59
Prior use of migrant workers (Q12a)		Recruitment sources (Q12d)	
Yes	40%	Through a contact/ friend/ family member	32%
No	60%	Walk-bys	29%
Number of migrant workers employed in past 12 months (Q12b)		Backpacker lodgings	29%
0	71%	Recruitment company	12%
1	1%	Labour hire company	8%
2	3%	Online job ads	7%
3	3%	Newspaper ads	3%
More than 3	21%	Other (specify)	5%
Mean	7.7		
Median	0		
Positions occupied by migrant workers (Q12c)			
Labourer (including pickers)	30%		
Farm worker / farm hand	14%		
Packing shed worker	11%		
Machinery operator / maintenance	3%		
Other	3%		
Not applicable (none ever employed)	60%		

Q12a. Have you ever employed migrant workers? (Base: Total Production Horticulture industry n=149)

Q12b. How many migrant workers would you have hired in the past 12 months? RECORD NUMBER 0-999

(Base: Total Production Horticulture industry n=149)

Q12c. What jobs do these migrant workers do? DO NOT READ OUT. MR (Base: Total Production Horticulture industry n=149)

Q12d. How do you find these migrant workers? DO NOT READ OUT. MR (Base: Businesses in the Production Horticulture industry who have employed migrant workers in the past n=59)

#### 4.5.11. Looking forward – employment numbers.

Table 111: Staff numbers in the next 2 years (Production Horticulture 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	<b>34%</b>	66%	8%	8%	4%	13%	100%	2.1	0
Part time	<b>19%</b>	81%	10%	5%	1%	3%	100%	0.5	0
Casual	<b>49%</b>	51%	1%	4%	1%	43%	100%	27.3	0
Contract	<b>19%</b>	81%	7%	4%	3%	5%	100%	0.6	0

Q11. How many people do you envisage employing full time, part time, casual or contract in the next 2 years? (Base: Total Production Horticulture industry, excluding those who indicated don't know minimum n=142) \* 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 112: Sample profile (Production Horticulture Industry)

Demographic	%	Demographic	%
Industry*		Employment status (SC5)	
<b>Industry represented in survey (quota)</b>		I am the sole or joint owner	81%
Production horticulture	100%	I am a manager	12%
<b>Top primary revenue stream (SC4A)</b>		I am an employee	7%
Production horticulture	95%	<b>Business role (SC3a)</b>	
Beef – pastoral	3%	A primary producer	96%
<b>Top secondary revenue streams (SC4B)</b>		A supplier to primary producers	4%
None	52%	<b>Location (SC6)</b>	
Beef - pastoral	13%	South-East Queensland	27%
Production horticulture	8%	Other	73%
Sugar cane	5%	<b>Business type (Q13)</b>	
		Family owned business	95%
Less than 5 years	4%	Corporate business	5%
Between 5 - 10 years	10%	<b>Annual turnover (Q14)</b>	
Between 10 - 20 years	19%	Less than \$1 million	59%
Between 20 - 50 years	50%	\$1 million to \$4.9 million	28%
More than 50 years	17%	\$5 million to \$19.9 million	5%
		\$20 million and over	1%
		Refused/Don't know	7%

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 Production Horticulture industry (n=149)

#### 4.5.12. Changes in employment over time (Production Horticulture 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 Production Horticulture. The purpose of this research was to determine, for each industry:

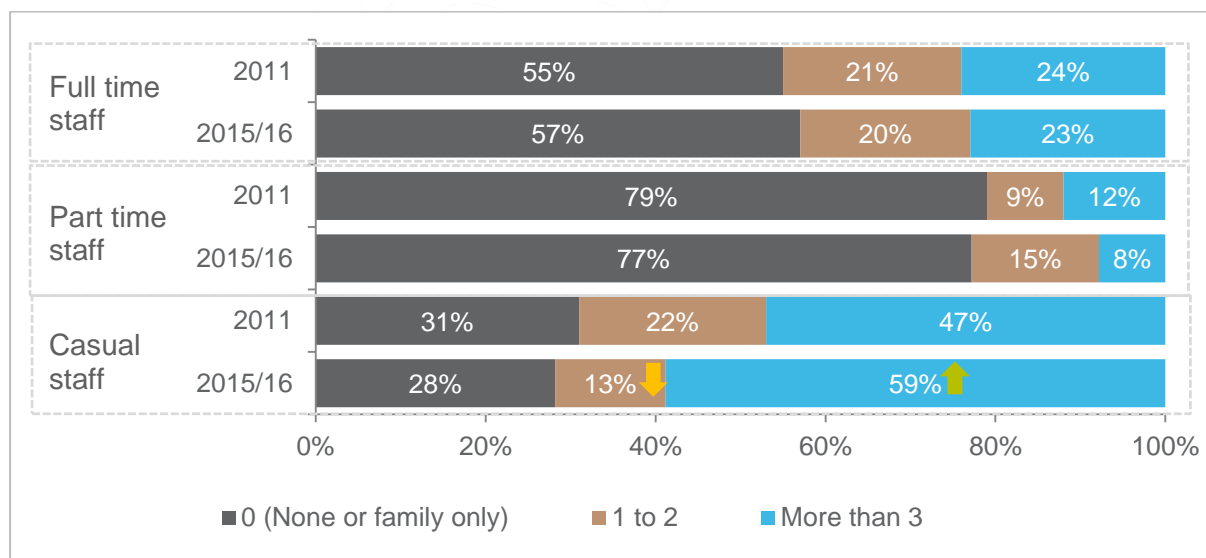
- A business and employee profile;
- The skills and knowledge required in the industry;
- Trends in recruitment; and
- Major factors that would impact the industry in next 5-10 years and how this would affect the skills requirement.

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.**

#### Insights

Figure 50 compares the number of full time, part time and casual staff members employed in each year of the research. Whilst there has been no change in the number of full time staff, this year has seen a marginal increase in part time staff and a much larger increase in casual staff.

Figure 49 Trend data: Number of full time, part time and casual staff (Production Horticulture Industry)

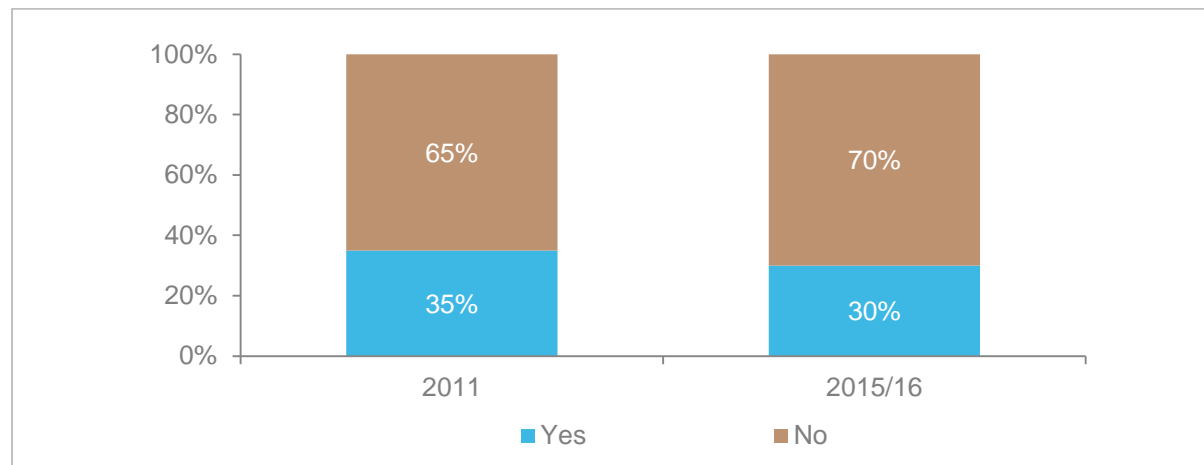


2011: Q2/3/4. Excluding yourself and any family members, how many full time/part time/casual staff do you employ? (n=150)

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 Production Horticulture Industry n=149)

Figure 51 compares whether contractors were employed in each year of the research. There has been a slight decrease in the employment of contractors, decreasing from 35% in 2011 to 30% in 2015/16.

Figure 50 Trend data: Employ contractors (Production Horticulture Industry)

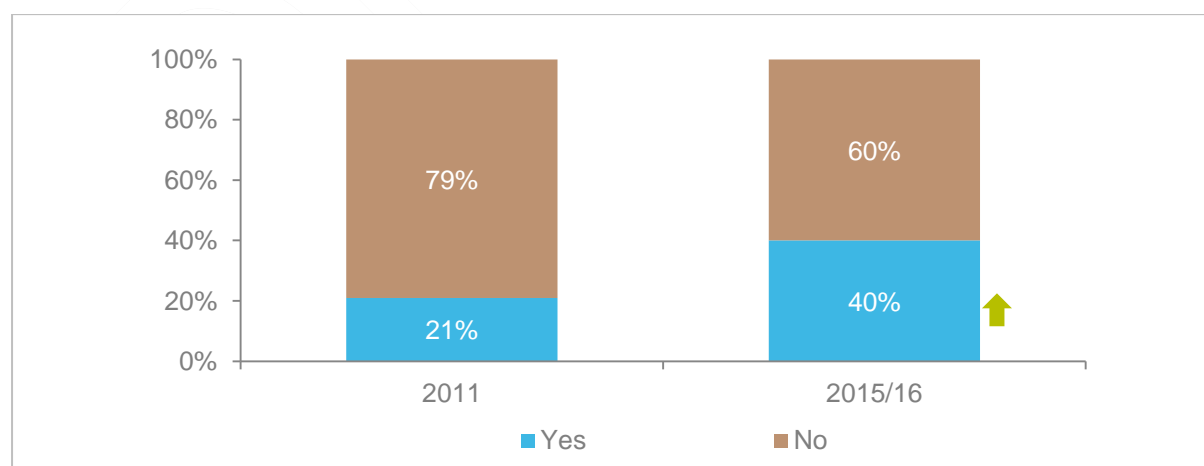


2011: Q5a. Do you use contractors on a semi-regular or regular basis? (Base: Total Production Horticulture Industry n=150)

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 Production Horticulture Industry n=149)

Figure 52 compares whether migrants had ever been employed in each year of the research. The incidence of this within the Production Horticulture industry has increased significantly from 21% in 2011 to 40% in 2015/16.

Figure 51 Trend data: Employ migrant workers (Production Horticulture Industry)

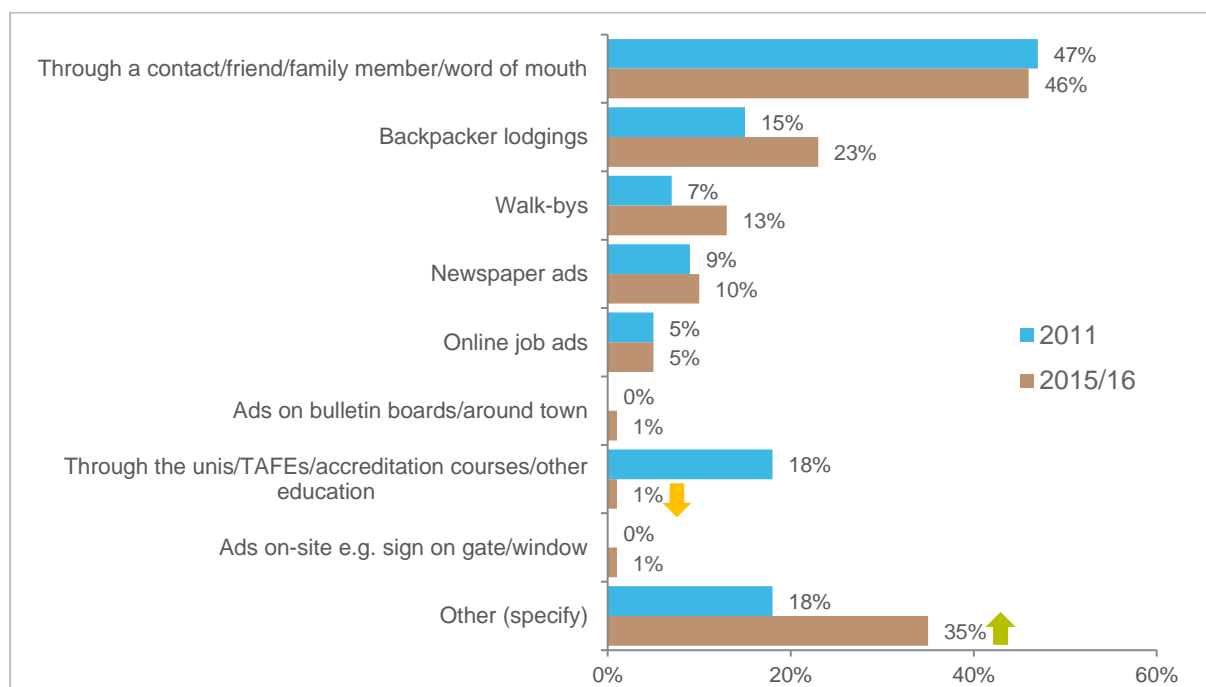


2011: Q11b. Have you ever employed migrant workers? (Base: Total Production Horticulture Industry n=150)

2015/16: Q12a. Have you ever employed migrant workers? (Base: Total Production Horticulture Industry n=149)

Figure 53 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 (47% in 2011, 46% in 2013/14). Recruitment via backpacker lodgings has increased this year from 15% in 2011 to 23% in 2015/16, corresponding with the large increase in employment of migrant workers in this industry as described earlier. Educational institutions (uni/TAFE etc.) are no longer a popular source of recruitment compared to 2011.

Figure 52 Trend data: Recruitment sources (Beef Industry)



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

2015/16: Q7. How do you currently source staff? DO NOT READ OUT. MR. (Base: Total Production Horticulture Industry n=149)

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

Representatives of the Production Horticulture 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 54 shows the proportion of businesses likely to employ *any* staff of this nature, while Figure 55 shows a detailed breakdown of the predicted numbers.

The proportion of businesses forecast to employ any full time, part time or casual staff in the next two years remains consistent with 2011, whilst the proportion of businesses forecast to employ any contractors remains stable. The increase in numbers of casual staff likely to be employed is quite significant.

Figure 53 Trend data: Staff numbers in the next 2 years – Nett Any (Production Horticulture Industry)

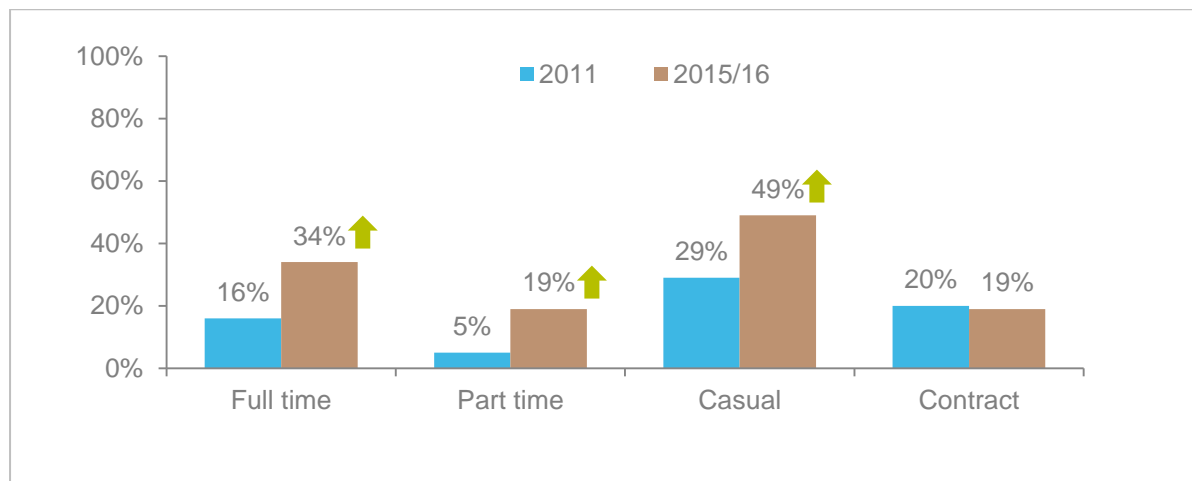
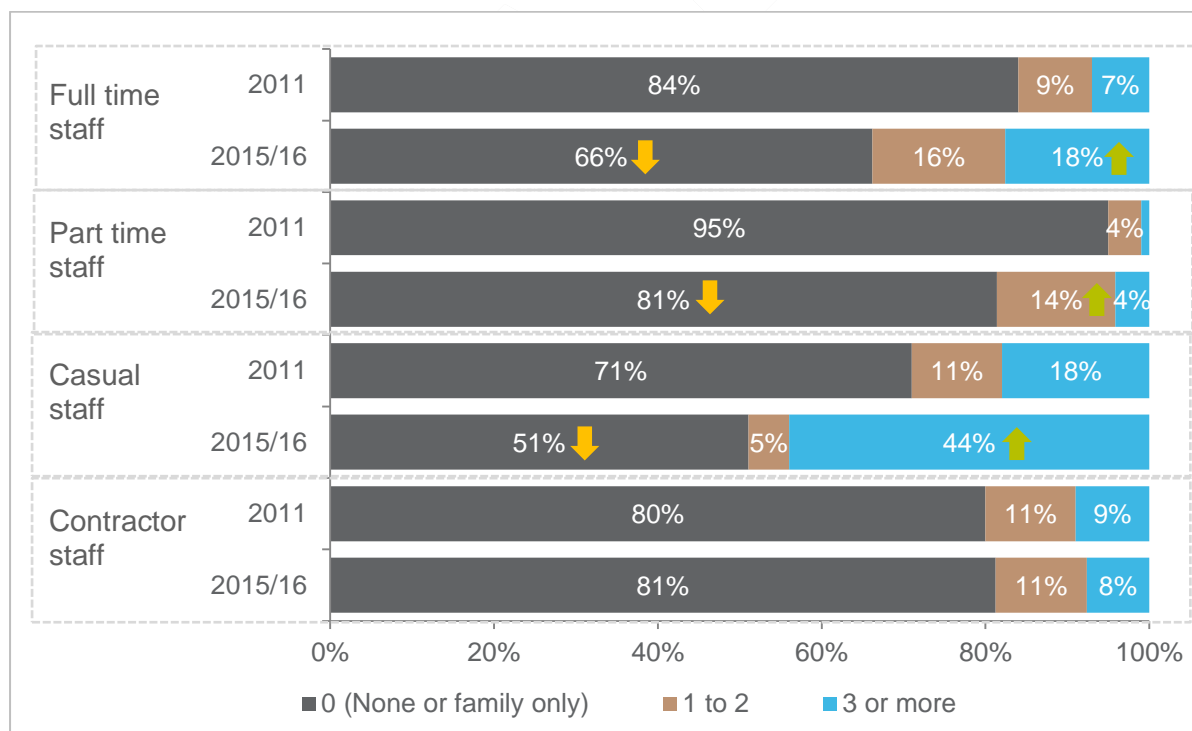


Figure 54 Trend data: Staff numbers in the next 2 years – Detailed breakdown (Production Horticulture Industry)



2011: Q6. How many do you envisage employing full time, part time, casual or contract in the next 2 years? (Base: Total Production Horticulture 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 Production Horticulture industry, excluding those who indicated don't know minimum n=141)

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