



Wine Tasmania



# REPORT FOR WINE TASMANIA ON TASMANIAN WINE SECTOR EMPLOYER SURVEY

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**APRIL 2013**

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# 1. EXECUTIVE SUMMARY

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Wine Tasmania, as the peak body for Tasmanian grape growers and wine producers, is currently gathering evidence to better understand existing and emerging training requirements in the local wine industry. The results of this survey will inform the broader workforce planning process and allow for the development of targeted workforce development strategies (such as the composition of training) to contribute to skills growth. The aim of the survey was to project the demand of businesses for VET, Tertiary and skills set qualifications over the next five years as well as to identify critical workforce issues and trends affecting the industry.

Seventy business owners/operators participated in the survey representing 25% of the industry. Sub-sectors that businesses are primarily operating in are grape growing, sales and marketing and vineyard management/operations. The workforce mainly consists of seasonal workers and 24% of this workforce segment is employed through a seasonal contracting agency. The largest job group employed is 'vineyard workers casual/seasonal'. Vineyard workers are also the most critical job group, hard to fill and difficult to retain. Aging is also a concern for this job group. It is recommended that a workforce planning pilot is undertaken with up to five businesses of different sizes and locations to understand the top five critical job groups in more depth. This will strengthen the workforce planning requirements for the industry.

Employees in the wine industry are more likely to currently have skills set qualifications rather than VET or Tertiary qualifications. Respondents have reported that current delivery methods suit their needs and the majority of training required in the future will be skill set qualifications. 74% believe the types of skills required will not change over the next five years. Skill set qualifications is more likely to be required over the next five years than VET or Tertiary qualifications. Essentially, businesses are saying they are satisfied with the status quo. It is recommended that the areas of sales and marketing are further explored to determine training requirements.

The greatest retention challenge for the wine industry is the seasonal/nature of the work. This is further supported by the number one reason employee's leave (nature of the work). The most commonly used flexible working arrangement is staggered start and finish times. Most businesses said they had not had the need to implement other flexible working arrangements (FWA). Job sharing with a compatible industry is a common FWA that businesses would consider using. This should be further investigated. It is recommended that further clarification is required from business owners about the types of FWA they would like to implement and what is possible within existing 'employment laws' to assist with retention.

The seasonal nature of the work will continue to be a challenge in the wine industry. The supply pool is relatively unknown. Seasonal workers are mostly vineyard workers and there is currently no mandatory training required for employees (or potential employees) to work in this job group. Some employees may have qualifications (which are most likely to be skill sets) however they are expected to have experience to undertake this work. This report recommends that Wine Tasmania undertake further consultation with seasonal worker agencies, businesses and training providers to determine expectations of who and how the training for this job group should take place.

## 2. INTRODUCTION

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### 2.1 Background

Tasmania has '160 individual licensed wine producers and 230 working vineyards covering more than 1,400 hectares, with grapes processed through 29 wineries'<sup>1</sup>. Although Tasmania's total wine production represents 'less than 0.5% of the national wine grape production with an average yield over the past five vintages being around 6,500 tonnes', the States wines are gaining an international reputation for outstanding quality, particularly its sparkling wines, Chardonnay and Pinot Noir. The value per litre of Tasmanian wine exported is almost 'four times the national average, and Tasmanian wines represent 6% of Australia's overall premium wine sales'.

To support industry growth, Wine Tasmania in partnership with Skills Tasmania has a vested interest in gathering industry intelligence to better understand the wine industry's workforce needs. Skills Tasmania is responsible for 'planning, purchasing and supporting the delivery of vocational education and training (VET) services for Tasmania; the development of policy advice for skills development; promotion of industry investment in training; and the development, regulation and administration of apprenticeships/traineeships and other State funded skills development programs in Tasmania.'<sup>2</sup>

Wine Tasmania as the peak body for Tasmanian grape growers and wine producers, is hoping to gather workforce planning evidence to better understand existing and emerging training requirements in the local wine industry. This evidence will inform the broader workforce planning process and allow for the development of targeted workforce development strategies (such as the composition of training) to contribute to skills growth.

Wine Tasmania contracted Workforce Planning Australia to undertake a survey with businesses within the wine sector to gather more information about future training requirements and to determine general workforce issues.

### 2.2 Survey Aim

The aim of this survey is to:

- Project the demand of businesses for VET, skills sets and tertiary qualifications over the next five years
- Identify critical workforce issues and trends affecting industry workforce demand and supply

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<sup>1</sup> Wine Tasmania, 2012, Strategic Plan 2011-2013

<sup>2</sup> Skills Tasmania, 2012, <http://www.skills.tas.gov.au/>

## 2.3 Survey Objectives

The agreed objectives of this survey were to:

1. Gather demographic data from individual businesses to assist in identifying the industry composition
2. Understand the current state of workforce capability and future workforce development needs (over the next five years)
3. Understand how training providers and industry can collaborate to build industry capability
4. Understand workforce issues and trends relating to recruitment, retention and potential career pathways for critical job groups

## 2.4 Survey Scope

Business owners/operators in the Tasmanian wine industry completed the survey.

## 2.5 Methodology

### 2.5.1 Relationship of survey questions to survey objectives

The survey questions were mapped to the survey objectives to ensure all questions were relevant. The survey was presented to participants under key headings that summarised groups of questions relating to the objectives. This was to ensure that a logical sequence of questions was presented to the end user without having to fully understand the detailed objectives.

### 2.5.2 Data collection method

The survey was completed online using Workforce Planning Australia's workforce-profiler™ tool. An email containing the survey link was emailed to all producers currently registered on Wine Tasmania's producer data base. Wine Tasmania in conjunction with the Tasmanian Skills Institute allocated a project officer to support businesses to complete the survey. This support included individual phone calls to businesses to encourage participation as well as to clarify survey questions.

### 2.5.3 Response Rates

A total number of 60 responses were nominated as appropriate by Wine Tasmania. This was based on previous response numbers of an annual survey administered by Wine Tasmania. The aim was to ensure responses provided a sample of small, medium and large businesses. The definition of small, medium and large is based on responses to Question 4 – *What was the total yield (tonnage) of your business for the 2012 vintage (include own label and contract grown fruit).*<sup>3</sup>

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<sup>3</sup> Business size has been determined by the following:

- small business = all responses that indicated a yield of less than 20 and 20-50
- medium business = all responses that indicated a yield of 50-100, 100-200 and 200-500
- large business = all responses that indicated a yield of 500-1000 and >1000 plus manually nominated Dalrymple and Bream Creek Vineyard

Total number of businesses by category and response rates:

<b>Business size</b>	<b>Number of businesses<sup>4</sup></b>	<b>Number of responses</b>	<b>% response rate of total number of businesses in each category</b>	<b>% response rate by total number of responses</b>
Large	8	7	88%	10%
Medium	48	13	27%	19%
Small	223	49	22%	71%
<b>Total</b>	<b>279</b>	<b>69</b>	<b>25%</b>	<b>100%</b>

The response rate has exceeded the expectations of Wine Tasmania. Two responses were received from one winery. In this instance all data provided by the owner, and only the qualitative responses provided by the second respondent, have been included in the analysis

#### **2.5.4 Analysis Approach**

The analysis has been grouped under the following key headings:

- Business Demographics (objective one)
- Workforce Demographics (objectives one and two)
- Learning and Development (objective two and three)
- Attraction and Retention (objective four)

All survey responses have been reported on collectively as a whole response. Where appropriate, questions have been filtered to reflect responses from each of the different business sizes. Comparisons have been made where there is a difference in responses. Where questions have been filtered to reflect this, business size has been identified by a combination of using the nominated size of yield for 2012 (Survey Question 4) and manual nomination for large businesses. Unless otherwise stated, responses reflect all business sizes.

#### **2.5.5 Assumptions and Limitations**

Although the response rates have exceeded expectations the number of responses for both small and medium businesses are less than 30% therefore, these responses should be treated with caution when drawing conclusions.

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<sup>4</sup> Business number by size have been supplied by Wine Tasmania, these are approximate numbers

### 3. SUMMARY OF FINDINGS

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#### 3.1 Business Demographics

Survey respondents were mainly small businesses which represent 70% of total responses.

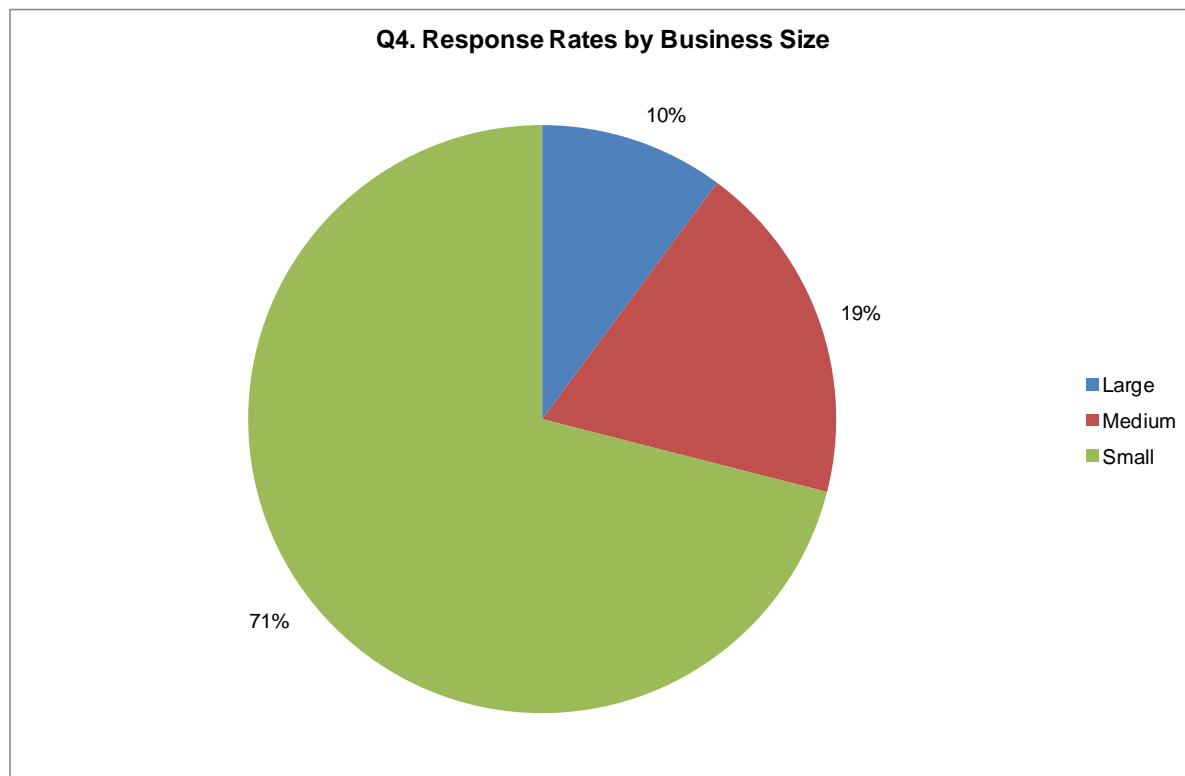


Figure 1 Q 4. Response Rates by Business Size

The top three sub sectors the respondents are operating in are:

1. Grape growing (94%)
2. Sales and marketing (73%)
3. Vineyard management and operations (71%)

The three regions most strongly represented in the survey responses are:

1. Coal river valley (33%)
2. Tamar Valley (24%)
3. Derwent Valley equally with East Coast (19%)

Most businesses have been owned and operated for:

1. 10-15 years (27%)
2. 5-10 years (19%)
3. 2-5 years (16%)



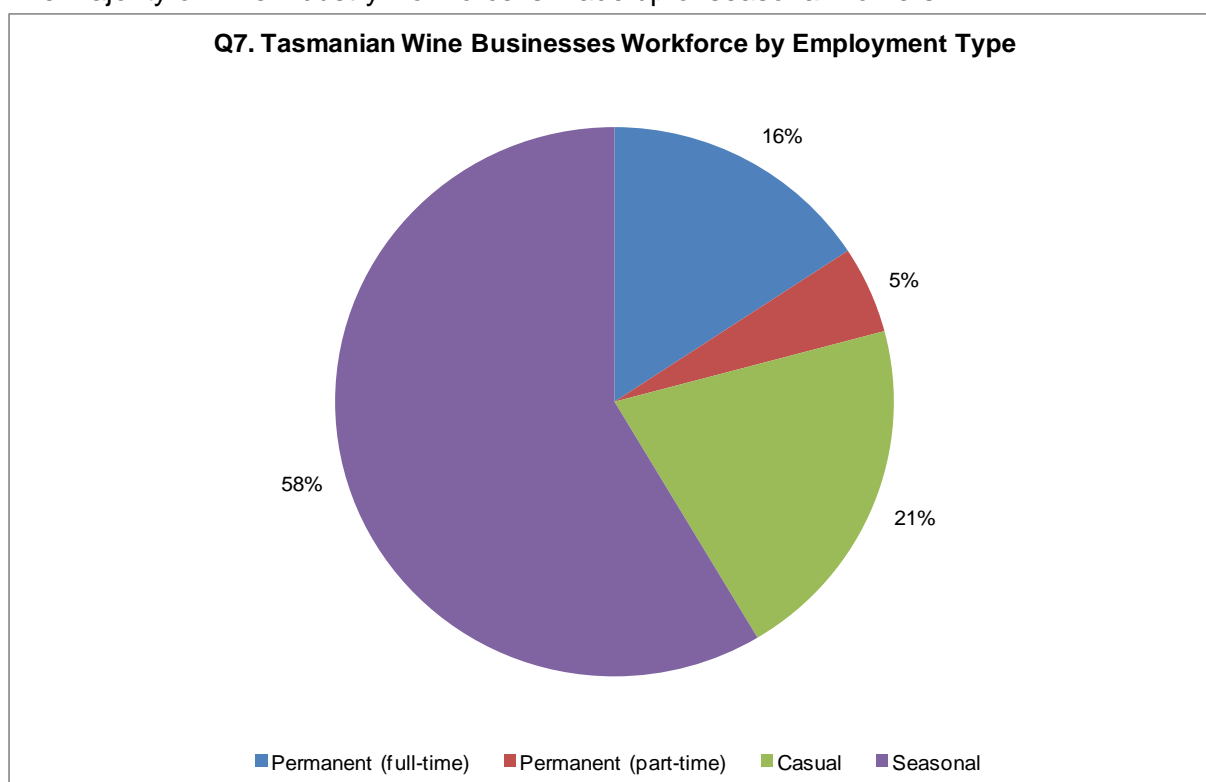
### 3.2 Workforce Demographics

The following section outlines the workforce demographics of the employees of those businesses who completed the survey. It is not a conclusive description of all employees in the industry, however it provides an indication of the workforce demographics across the industry.

The table below outlines a summary of employees employed in the wine industry by survey respondents:

Gender	Permanent <sup>5</sup> Full-time <sup>6</sup>	Permanent Part-time <sup>7</sup>	Casual <sup>8</sup>	Seasonal <sup>9</sup>	Total
Male	135	30	111	218	594
Female	44	29	135	362	570
<b>TOTAL</b>	<b>179</b>	<b>59</b>	<b>246</b>	<b>580</b>	<b>1164</b>

The majority of wine industry workforce is made up of seasonal workers:



**Figure 2 Q 7. Tasmanian Wine Businesses Workforce by Employment Type**

58% of the workforce is seasonal. The seasonal workforce is made up of 62% female and 37% male. 24% of seasonal workers are employed through an agency. Those that employ seasonal workers through an agency said they represent 47% of their seasonal workforce.

<sup>5</sup> A permanent employee is a person who has been hired for apportion without a pre-determined time end limit.

<sup>6</sup> A full-time permanent position usually consists of 38.5 hours per week.

<sup>7</sup> A permanent part-time position works less than 38.5 hours per week on an ongoing basis.

<sup>8</sup> A casual/temporary worker is someone who is generally hired for short term work, is paid according to hours worked and does not receive the same benefits that were available to permanent employees such as paid leave.

<sup>9</sup> A seasonal worker is someone who is employed to undertake work at certain times of the year (for example to meet variations in production cycles). These may include vintage and/or pruning staff.

The largest job groups employed by businesses are:

1. Vineyard workers casual/seasonal (76%)
2. Vineyard workers permanent (41%)
3. Cellar door (40%)

The top three job groups employed that are expected to **increase** are:

1. Vineyard worker (40%)
2. Cellar door (27%)
3. Cellar hand (13%)

The top three job groups employed that are expected to **stay the same** are:

1. Vineyard Manager/Leading Hand (46%)
2. Viticulturist (43%)
3. Vineyard worker (39%)

The top three job groups employed that are likely to **decrease** are:

1. Vineyard worker (9%)
2. Viticulturist (6%)
3. Vineyard manager/leading hand – cellar door – laboratory staff – other (information not supplied) (4%)

Up to 41% of businesses have employed people on working Visas in the last 12 months. 77% of those indicated they are working holiday Visas. The types of workers mainly employed on Visas are vineyard worker casual/seasonal (22%) and Cellar door workers (6%).

The top five critical job groups<sup>10</sup> are:

1. Vineyard worker
2. Viticulturist
3. Vineyard manager/leading hand
4. Wine maker
5. Cellar door

44% said it is not likely that the critical job groups will change over the next five years however, 33% said they did not know.

21% of respondents are concerned about an aging workforce in the following job groups:

1. Vineyard workers casual/seasonal (73%)
2. Vineyard workers permanent (60%)
3. Vineyard Manager/Leading Hand (20%)

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<sup>10</sup> A critical job group is a job that is critical to the businesses capacity to deliver core functions/products and services. It may or may not be in a recognised skills shortage.

### 3.3 Learning and Development

Below is an overview of the current and future learning and development requirements of the industry:

- 27% of respondents either disagreed or strongly disagreed that the tertiary qualifications currently provided in Tasmania suit their business needs
- 50% agree that VET qualifications suit the needs of their business
- 57% either agreed or strongly agreed that the skills sets currently offered meet their businesses needs.
- In all areas of this question on average 35% reported they neither agreed nor disagreed

80% of respondents said that the current delivery methods suit their needs. Those that disagreed said it was because of quality (not quantified), travel and time. 69% said they were not aware of training subsidies. This indicates there is a lack of awareness of the training subsidies available and is an opportunity to provide more publicity.

The numbers of employees with qualifications varied across the qualification types, outlined in the following three tables. These numbers are representative of the industry workforce only:

Current Skill Set qualifications:

<b>Skill Sets</b>	<b>Total Number of Responses</b>
Responsible Service of Alcohol	223
Forklift	121
First Aid	108
Chemcert	79
Chainsaw	70
Safe Food Handling	52
Confined Spaces	32
Introduction to Viticulture	30
Wine Appreciation I & II	26
ATV (All Terrain Vehicle)	21

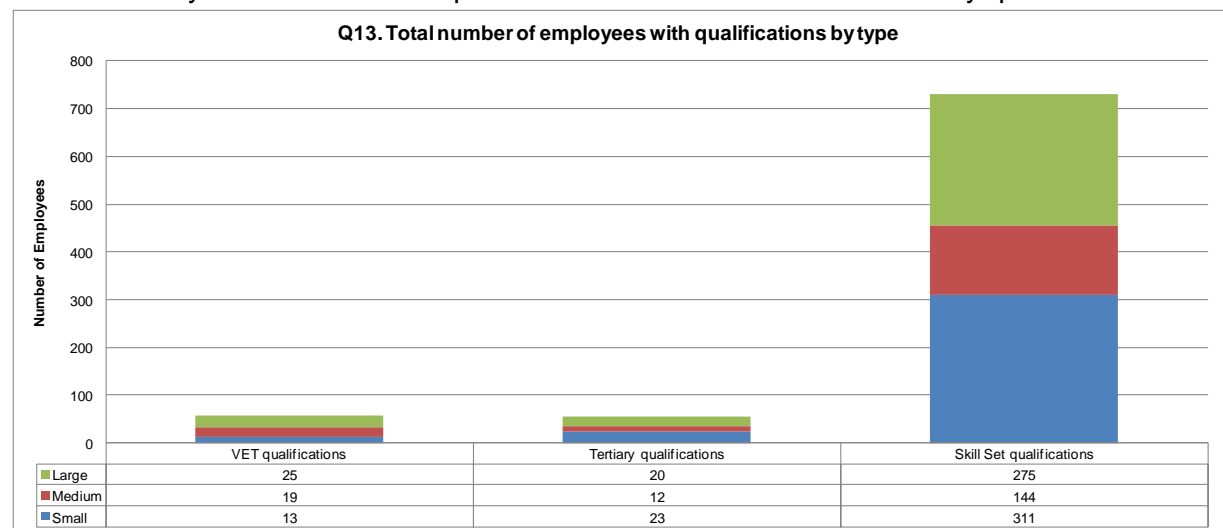
Current VET qualifications:

<b>VET Qualification</b>	<b>Total Number of Responses</b>
Certificate III in Wine Industry Operations (previously Certificate III in Food Processing (Wine))	25
Certificate II in Wine Industry Operations (previously Certificate II in Food Processing (Wine))	15
Certificate II in Hospitality	9
Certificate III in Hospitality	9
Diploma/Advanced Diploma of Hospitality	3
Diploma/Advanced Diploma of Tourism	2

Current Tertiary qualifications:

<b>Tertiary Qualifications</b>	<b>Total Number of Responses</b>
Degree in Winemaking (Not currently offered in Tasmania)	21
Bachelor of Applied Science (Viticulture) (Not currently offered in Tasmania)	12
Bachelor of Business/Commerce	9
Bachelor of Applied Science	8
Bachelor of Agriculture	4
Bachelor of Wine Tourism (Not currently offered in Tasmania)	2
Master of Business Administration (MBA)	2

The above tables and the figure 3, show that employees in the Wine Industry in Tasmania are more likely to have a skill set qualification rather than a VET or Tertiary qualification:



**Figure 3 Q 13. Total number of employees by Qualification Type (survey respondents)**

74% of respondents believe the types of skills required to work in the industry will not change over the next five years. The following three tables provide an indication of the types and a guiding priority order of training that will be required the next five years:

Future Skill Set qualifications required over the next five years:

<b>Skill Sets</b>	<b>Frequency of response</b>
First Aid	36
Responsible Service of Alcohol	34
Chemcert	33
Forklift	32
Chainsaw	19
Introduction to Viticulture	18
Wine Appreciation I & II	18
Safe Food Handling	17
ATV	15
Confined Spaces	13
Other	5

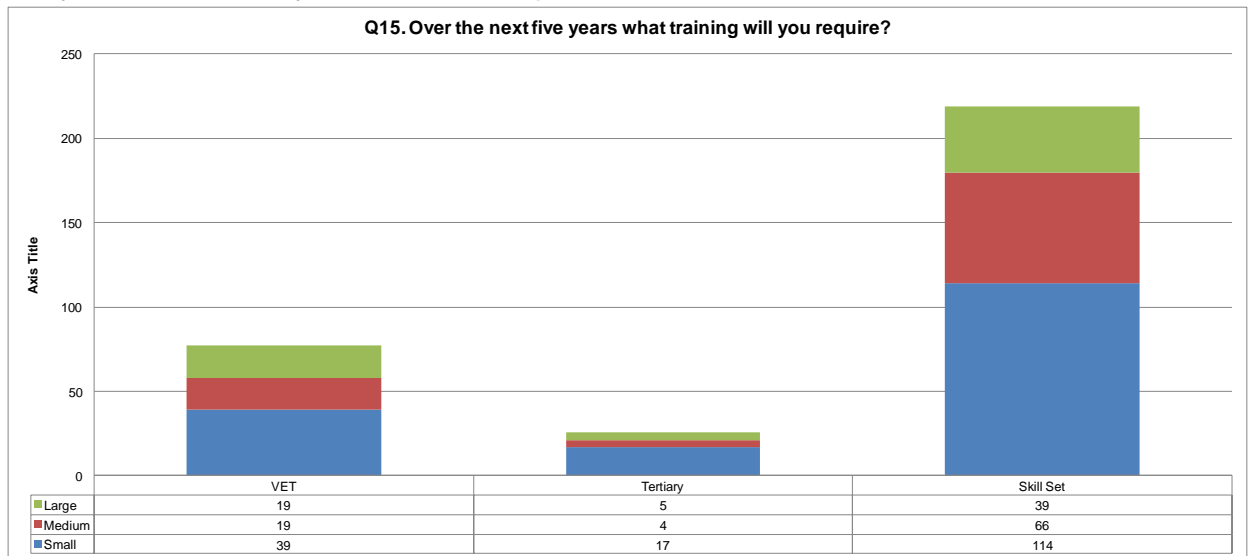
Future VET qualifications required over the next five years:

<b>VET Qualifications</b>	<b>Frequency of response</b>
Certificate III in Wine Industry Operations	15
Certificate IV in Viticulture	15
Certificate II in Wine Industry Operations	14
Diploma of Viticulture	14
Certificate IV in Wine Industry Operations	7
Certificate II in Hospitality	6
Certificate III in Hospitality	6
Diploma/Advanced Diploma of Hospitality	3
Diploma/Advanced Diploma of Tourism	3

Future Tertiary qualifications required over the next five years:

<b>Tertiary Qualifications</b>	<b>Frequency of response</b>
Degree in Winemaking	13
Bachelor of Applied Science	7
Bachelor of Wine Tourism	2
Bachelor of Agriculture	1
Other	1

As the above three tables and the following figure show, the training required over the next five years is more likely to be skills sets qualifications.

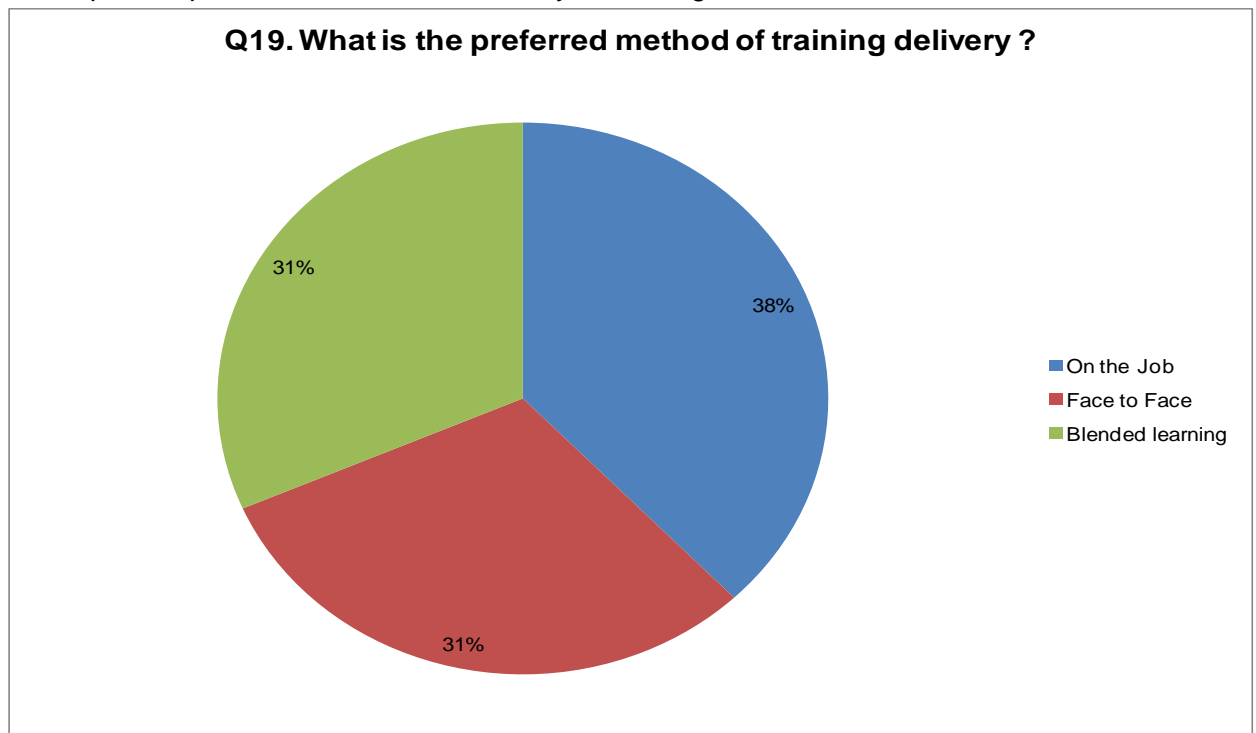


**Figure 4 Q 15. Tasmanian Wine Industry Training Requirements by Type**

Other training required as stated in the free text field includes:

Area of training required	Frequency of response
Sales and Marketing	9
IT –social media and e-commerce	7
General management – accounting, general business, record keeping, MYOB	6

The top three preferred methods of delivery of training are as follows:



**Figure 5 Q 19. Preferred training delivery method**

Respondents suggested that training could be improved by:

Suggested Improvements for Training*	Frequency of response
Improved communication about what courses are on offer, when and where	3
Training should take place on the job, just in time and be hands on	2
Training should take place onsite in the workplace	2

\*Note: There were a limited number of responses to this question. The above three dot points should be used with caution.

The top three barriers to undertaking training and development were:

1. Location of where training takes place (39%)
2. Unable to employ workers all year round equally with costs (37%)
3. Loss of productivity through absence of the employee from the workplace (29%)

These barriers were common across all business sizes however the order of importance was different.

### 3.4 Attraction and Retention

The top five hard to fill job groups are:

1. Vineyard worker casual/seasonal (44%)
2. Vineyard manager/leading hand (24%)
3. Vineyard worker permanent (22%)
4. Cellar door (14%)
5. Winemaker equally with Viticulturist (11%)

20% said that hard to fill job groups are likely to change over the next five years. There were slightly different responses by business size as outlined below:

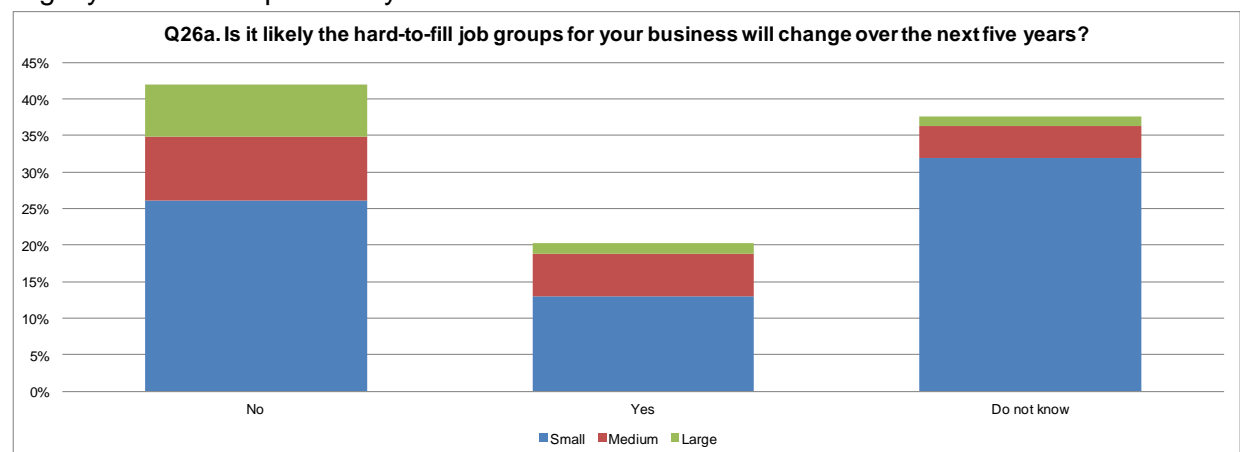


Figure 6 Q 26. Likelihood of hard-to-fill job groups changing over the next 5 years

The top three job groups that are difficult to retain are:

1. Vineyard workers casual/seasonal (31%)
2. Vineyard workers permanent (10%)
3. Other (7%)

The top three **most commonly used** flexible working arrangements are:

<b>Business size</b>	<b>Small</b>	<b>Medium</b>	<b>Large</b>
1.	Staggered start and finish times (33%)	Job sharing within another wine business (54%)	Staggered start and finish times (100%)
2.	Time off in lieu of overtime equally with rostered days off (20%)	Staggered start and finish times (46%)	Job sharing within another wine business equally with Job sharing within another wine business (57%)
3.	Access to further training/development (10%)	Time off in lieu of overtime equally with Rostered days off equally with Job sharing within another wine business (23%)	Rostered days off (43%)

The top three flexible working arrangements that businesses **would consider** using were:

<b>Business size</b>	<b>Small</b>	<b>Medium</b>	<b>Large</b>
1.	Access to further training/development equally with job sharing within another wine business equally with Job sharing within a compatible industry (55%)	Job sharing within another wine business equally with Reduced salaries for extra annual leave equally with Access to further training/development (62%)	Reduced salaries for extra annual leave (57%)
2.	Time off in lieu of overtime (43%)	All other options (46%)	Access to further training/development equally with time off in lieu of overtime (43%)
3.	Reduced salaries for extra annual leave equally with job sharing within a compatible industry (39%)		Job sharing within another wine business (29%)



Barriers to implementing flexible working arrangement extracted from the text comments included:

<b>Barrier to implementing flexible working arrangements</b>	<b>Frequency of response</b>
Have not had the need (to implement)	15
Lack of access to share (workforce), knowing who is willing to share (workforce), who's available	7
Employment laws	5
Financial restraints	5

The top three flexible working arrangements that businesses would **NOT** consider using were:

<b>Business size</b>	<b>Small</b>	<b>Medium</b>	<b>Large</b>
1.	Reduced salaries for extra annual leave (53%)	Reduced salaries for extra annual leave (38%)	Rostered days off (57%)
2.	Rostered Days Off (47%)	Access to further training/development equally with Rostered days off equally with time off in lieu of overtime (31%)	Time off in lieu of overtime (43%)
3.	Staggered start and finish times (39%)	Job sharing within another wine business (15%)	Reduced salaries for extra annual leave equally with access to further training/development equally with job sharing within a compatible industry (29%)

The key themes arising as retention challenges are as follows:



**Figure 7 Q 29. Retention challenges faced by Tasmanian Wine Industry Employers**

The top three reasons of why employees leave were:

Business size	Small	Medium	Large
1.	Nature of the work (32%)	Nature of the work equally with lack of regular hours or permanent work (9%)	Nature of the work equally with lack of regular hours or permanent work (4%)
2.	Offered higher salaries in other industries (20%)	Lack of career paths (6%)	Lack of career paths equally with family reasons, offered higher salaries with other employers and other (3%)
3.	Lack of regular hours or permanent work (17%)	Family reasons equally with offered higher salaries in other industries (4%)	

The most commonly used recruitment methods are:

Business size	Small	Medium	Large
1.	Word of mouth (41%)	Word of mouth (16%)	Word of mouth (7%)
2.	Contractors (13%)	Advertisements and local media (9%)	Advertisements and local media (7%)

## 4. Conclusions

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This survey had two aims and four objectives (see 2.2 Survey Aim and 2.3 Survey Objectives). Below are the conclusions drawn from the survey results relating to the aims and objectives.

### 4.1 Current workforce demographics

Employees in the wine industry generally have skill set qualifications rather than full VET or Tertiary qualifications. The largest segment of the workforce is a seasonal worker which makes it difficult to determine current qualifications as they are not employed full time in the business. The survey was not able to establish if the same seasonal workers are employed in the same business for each seasonal cycle.

There are no mandatory qualifications required to be a seasonal worker. The requirements to work in this area vary in skills base depending on the tasks required to be undertaken. This difficulty is exacerbated by the transient nature of the workforce with quarter of the seasonal workforce employed through agencies and many businesses employing people on a working holiday visa. The challenge for the wine industry is to determine who is responsible for training this job group and to determine entry level skills. It is not clear if the employers have an expectation that this job group should be 'job ready' when they seek them from the labour market or if those employing through an agency believe it is the agency's responsibility.

### 4.2 Future training requirements

The future training requirements are not expected to change significantly over the next five years. Skill set qualifications will remain as the most applicable to business owners rather than full qualifications (in VET or Tertiary). Most businesses would like to see training occur on the job and face to face. Minimising travel and loss of productivity (when employees are 'off the job') are important factors for businesses to engage in future training. Overall the results indicate that most businesses are satisfied with the current training offered in Tasmania and they do not anticipate the types of skills changing over the next five years.

Sales and marketing was rated as the second highest sub sector that businesses operate in. It has not been consistently raised throughout the survey responses. It has been cited as 'other' training required, this only came from nine respondents out of a possible 70. It is not listed as a critical job group, hard to fill or difficult to retain. It is not known if training in this area is a priority requirement. The survey did not specifically seek information about this sub sector which could account for the lack of 'mention' throughout the report.

Although the ageing workforce was not cited a major issue for the industry some succession planning may be required to ensure there is a future supply of vineyard managers/leading hands. The timeframe for impact of this issue is unknown. Further investigation to understand the timeframe and size of this issue is required. It is also unclear if businesses are planning on 'growing their own' and/or if they require support through training.

### **4.3 Critical job groups and Workforce Issues**

The nature of the seasonal workforce will continue to be a challenge for the Wine Industry of Tasmania. The vineyard worker job group is seasonal, critical, hard to fill, difficult to retain, aging and somewhat transient. Although not essential, most permanent vineyard workers have a VET qualification (Certificate II or III in Wine industry Operations or Viticulture). Their skills vary depending on their job although tractor driving and chem cert skills are common. This job group requires more practical skills than full qualifications. Businesses are reluctant to invest (due to cost and time) in training for this job group as they are generally not employed all year round.

The survey has provided data about why employees leave wine organisations however it is not known if they leave the industry and if they do what industries they go to. This could have implications for training in relation to transferability of skills from one industry to another. There is interest in flexible working arrangements however; the results indicate that most businesses have not had the need to implement them and that 'employment laws' are barriers. These types of arrangements may assist in alleviating some of the retention challenges.

## 5. Recommendations

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### 5.1 Recommendations arising from the survey report:

#### 1. Ensuring job ready vineyard workers

Further consultation with seasonal workers agencies, businesses and training providers is required to determine the expectations of who is and how training will be offered for vineyard workers. The aim of this is to ensure job ready vineyard workers are available for businesses when required.

#### 2. Determine sales and marketing training requirements

Sales and marketing in the wine industry requires further investigation. It is not clear from the survey results if training is required or not required, how many people work in related job groups and if there is specific workforce risks in this area.

#### 3. Increase flexible working arrangements

Explore the potential for flexible working arrangements currently available within 'employment laws' and seek clarification from the industry about what changes are desired. This type of activity is likely to increase retention.

#### 4. Facilitate job sharing of employees

There is interest in businesses in job sharing employees within the industry and with compatible industries. This needs to be further explored with compatible industries to determine if they have an interest in participating in this type of activity. If this were to proceed, there would need to be a body or organisation that would be responsible for facilitating the job sharing.

### 5.2 Recommendations for 'where to from here' with workforce planning:

#### 5. Complete a workforce planning pilot with businesses

Complete a workforce planning pilot with up to five businesses of different sizes and locations. The purpose of this pilot would be gather more data on the five identified critical job groups to further enhance the industry workforce plan. It would also demonstrate the value of workforce planning for other business owners/operators. Follow on training could be provided to up skill business owners to undertake workforce planning within an industry agreed workforce planning framework generated through the pilot.

#### 6. Undertake environmental and labour market scanning

Environmental scanning will assist Wine Tasmania to understand the economic, technological, social, legislative and political changes or issues that may affect the industry. This could be further supported by Labour Market scanning on the identified critical job groups.