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Attracting and retaining staff in the red meat industry

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Abstract

The on-farm red meat industry is one of the most important contributors to the Australian economy and must meet a growing worldwide demand for produce/red meat. The red meat industry is also one of the largest employers within the agriculture sector. However, the proportion of farmers in Australia's population has been decreasing the last few decades. Further, low employee job application rates, high employee turnover and significant shortages of experienced labour can add to the challenges faced by employers.

The study re-examines the issues of attracting and retaining skilled rural labour for Australian producers, and compares results with the initial survey conducted in 2007. This includes the northern beef and southern beef, lamb and sheep meat industry sectors.

The report is based on a large scale survey of employers (owners and managers) and employees and provides empirical evidence about the attractors, motivators and demotivators to employee choice about working in the industry. Comparisons are made between the 2007 and 2013 study findings which indicate what has changed in the six years since the initial study.

Producers continue to have some difficulties in attracting and retaining staff, and many individual farms reported labour shortages, particularly during peak periods. On the positive side, however, employees generally felt highly engaged in their jobs and the majority of respondents (61%) anticipated a long term future at their current place of employment.

The report investigates proven strategies and outlines practical options and recommendations, for both the industry and individual producers, in addressing the challenges of attracting and retaining workers.

Executive summary

Despite the importance of the on-farm red meat industry and the unique employment opportunities it offers, many employers face major challenges in attracting and retaining workers. The low and declining availability of labour is a major constraint. Low job application rates, high staff turnover and shortages of experienced labour increase labour costs and reduce enterprise efficiency.

A 2007 survey by MLA and AWI (B.NBP.0370) examined the issues affecting attraction and retention of skilled rural labour for beef cattle and sheep enterprises. It has been six years since the inaugural survey and the outlook for employment in the agriculture industry is still uncertain. While there are predictions for modest growth for jobs in the industry in the next four years, unpredictable conditions (especially around climate variability and market volatility) make it difficult to project exactly what will happen to employment levels.

In 2013, a repeat of the survey study was commissioned by MLA, focusing on the on-farm red meat industry (northern beef, southern beef, and lamb and sheep meat). This study delves further into the issues faced by employers in the industry now, determines changes over time, and identifies current and practical strategies to address the emerging and ongoing issues. The study identifies the drivers of attraction and retention for each of the red meat sub-sectors and estimates the size and impact of challenges in these areas for farming enterprises. The report concludes with recommendations for the industry as a whole and for individual farms.

Demand for labour

The average number of full time vacancies per farm/property has significantly decreased since 2007. Many individual farms reported labour shortages, particularly during peak periods. However, the data suggest that there is usually a match between demand and supply for most employers, except for larger northern properties during the dry season peak period. The latter required significantly more staff in peak time and experienced larger labour shortfalls than other sectors.

The number of employers citing drought as a key factor influencing demand for labour has decreased significantly from 25% to 10% since 2007. This suggests that although drought remains an issue, it may not currently be a key driver of labour demand.

Attracting staff

The problem of recruiting staff to the industry is widespread across Australia, however the problem was found to be significantly exacerbated for the northern beef sector in both peak and non-peak times. The common perceived reasons for difficulty with recruitment reported by employers have not changed significantly since 2007 and include shortage of skilled people, low wages, losing workers to mining and lack of existing people being skilled up to work in the industry.

The most common and most effective recruitment method used was asking local people directly. Employers who advertised in a non-local newspaper or who recruited through a recruitment agency had significantly more difficulty with recruitment.

Factors influencing attraction of workers to the industry include having a family background of working on the land, the lifestyle, working with animals, and working outdoors. The farm or company's reputation also influenced employees' choice of specific employer in the industry.

Retention of employees

The extent of problems with turnover has generally remained relatively stable over time, but appear to have increased for part time workers. However, positively, the majority of

respondents (61%) indicated that they did see a long term future at their current place of employment. This is a slightly higher proportion than in 2007 which is encouraging, however small farm employees had significantly lower levels of certainty about their future with the business than those employed by large and medium farms.

People who indicated they saw themselves having a long term future with the business were significantly more likely to have higher morale, higher levels of engagement, and a higher level of job satisfaction, while also being more likely to have experienced strong leadership and clear direction, and working as a team.

Most employees who had moved from a previous employer did so because they found better career opportunities elsewhere. Many employers reported that allowing flexible working hours was the most effective retention strategy. Increasing salary was also perceived to be a useful strategy by employers, but data from *employees* showed that level of pay and benefits had little or no impact on their intention to stay with their employer, nor did it affect job satisfaction, morale or engagement. This indicates that, in contrast to employer perceptions, *amount* of pay is not as important as first thought.

Despite many employers' belief that losing skilled workers to mining was a major reason for recruitment difficulties, the proportion of people currently in the industry who want to go into mining is very small, and has in fact decreased over time (from 3.3% to 1.5%).

Working conditions

Standards set by the European Union suggest that working more than 48 hours per week poses a risk to individual health and well-being. The study found that 64% of the workforce is at risk and only 13% work sustainable hours. This suggests possible problems relating to burnout and fatigue. The proportion of people working unsustainable hours has not changed significantly since 2007.

Engagement and job satisfaction

The study highlighted that the industry continues to have highly engaged employees. In other words, employers are meeting employees' most important expectations to a high degree, employees enjoy their work, and most intend to stay. Analysis revealed several things that strongly and significantly predict higher levels of engagement with work. The top 5 were:

1. Being trusted and valued;
2. Managers being concerned with developing individuals and building a supportive environment;
3. Overall job satisfaction;
4. Effective communication between managers and staff; and
5. Attractive conditions of employment i.e. hours, leave, non-cash items.

Conclusions and recommendations

The results of this study support many of the major findings of the survey conducted six years ago, and identify that (1) employees continue to be highly engaged in their work and (2) an even higher proportion than in 2007 intend to stay long term. However, there are still difficulties with labour shortages and turnover. The results provide several clues on how enterprises of all sizes and sectors can improve their practices in the areas of attraction, recruitment and retention, as well as highlight some industry wide strategies that are likely to be of value. These are summarised below.

Recommendations at the industry level

1. To address the lack of skilled workers available for employers, it is recommended that there is an integrated industry approach to encouraging students to enter into agriculture courses at university as well as VET courses and traineeships.

2. Continue to work on developing a campaign to improve the image of the on-farm red meat industry as a career choice, especially for young people. Key aspects that can be leveraged include the lifestyle benefits, working outdoors and with animals, job variety, community orientation, high levels of job satisfaction and a highly engaged workforce.
3. Utilise existing databases/industry platforms to connect employers to job seekers or agriculture students.
4. Facilitate more opportunities for community networking and connectivity with a careers focus in mind, with the intent to connect employers with people in the local community who may have an interest in farm and livestock work. To support retention of staff, provide opportunities for owners/managers to develop their non-operational management skills, for example how to have career focussed conversations with staff, succession planning, people management skills, workforce engagement, building a high performing team, how to provide effective feedback, and having performance conversations. This may be especially beneficial for people on small to medium sized farms.
5. Set up mentoring or 'buddy' programs for new recruits across multiple businesses as a method of connecting workers with other, perhaps more experienced workers in the industry (not necessarily working at the same employer). This is a way of keeping workers connected with others in the industry as well as learning from each other.

Recommendations at the farm level

1. Continue to utilise a targeted approach to recruitment, i.e. approaching potential people directly, but increasing scope to advertise more broadly to high schools, VET colleges and universities, through agriculture groups and societies, and advertising online and through social media.
2. Ensure that, when advertising for a position that, the key attractions and 'features' of the job and lifestyle are also included to 'sell' the job.
3. Though the amount of pay does not seem to be important for staff retention, a fair level of pay may still be an important influencer of job satisfaction.
4. Develop the working environment by focussing on the key drivers of staff engagement. This includes ensuring employees feel trusted and valued, developing their skills and capabilities and providing a supporting working environment, as well as ensuring a good flow of communication between managers and staff.
5. Review current workloads of employees, remembering that each individual will have different 'limits' so it is important to explore the issue on a person by person basis.
6. Monitor job satisfaction and engagement. Gathering regular feedback from staff on how they are feeling and their intentions will allow employers to recognise potential problems before they develop into big ones. Ensure that career progression opportunities are clarified with employees, and that employees do have a clear idea of opportunities available within the business

Table of Contents

1	Background	8
1.1	General overview of employment in Australia	8
1.1.1	Employment conditions in Australia	8
1.1.2	Labour force participation	8
1.1.3	Other workforce challenges	9
1.2	'Current state' of the red meat livestock industry	9
1.2.1	The Importance of the Agriculture Industry	9
1.2.2	Overview of the Australian red meat livestock industry	9
1.2.3	People employed in the Australian on-farm red meat livestock industry (demographics)	9
1.2.4	Statistics and labour shortages in the Australian red meat livestock industry	10
1.2.5	Drivers shaping the demand for labour	10
1.3	Factors affecting attraction and retention	11
1.3.1	Workplace culture and organisational factors	11
1.3.2	Pay	11
1.3.3	Working conditions	12
1.3.4	Competitive labour market	12
1.3.5	Aging workforce	14
1.3.6	Environmental factors	14
1.3.7	Poor promotion of agriculture	14
1.3.8	Attracting students to study agriculture	15
1.3.9	Urban migration	15
1.4	Outlook for the future	15
2	Project objectives	16
2.1	Report purpose and description	16
2.2	Objectives	16
3	Methodology	17
3.1	Survey design and content	17
3.2	Recruitment process	17
3.3	Sample profile	18
4	Results	20
4.1	Attraction and retention impact	20
4.2	Demand for labour	21
4.3	Attraction of staff	26
4.3.1	Difficulty with recruitment – the extent of the problem	26

4.3.2	Attraction and recruitment methods	29
4.3.3	Reasons for attraction	32
4.4	Retention of employees in the red meat industry.....	35
4.4.1	Turnover	35
4.4.2	Employee commitment.....	36
4.4.3	Reasons for leaving	41
7.3.4	Retention strategies	43
4.5	Work conditions, job satisfaction and engagement with work.....	45
4.5.1	Pay, benefits and working conditions	45
4.5.2	Job satisfaction	48
4.5.3	Employee engagement	52
4.6	Case Studies	59
5	Discussion/conclusion.....	63
5.1	Overall summary.....	63
5.1.1	Demand for labour	64
5.1.2	Attraction of staff	64
5.1.3	Retention of employees	65
5.1.4	Working conditions.....	65
5.1.5	Engagement and job satisfaction	66
5.2	Best Practice Recommendations to Increase Attraction and Retention.....	66
5.2.1	Recommendations at the industry level.....	66
5.2.2	Recommendations at the farm level.....	67
6	Bibliography	69
7	Appendix A – Additional demographic data	73
8	Appendix B – Summary of survey findings by sector	79

1 Background

1.1 General overview of employment in Australia

1.1.1 Employment conditions in Australia

Over the five years leading to February 2012, Australia's employment levels have grown at a rate of 1.8% per year. The Department of Education, Employment and Workplace Relations (DEEWR) has previously predicted that employment will grow at a rate of 830,000 jobs over the four years to 2016-17 with positive employment growth expected to occur in 18 of the 19 Australian and New Zealand Standard Industrial Classification (ANZSIC) industries.

The industry projected to experience the most employment growth is Mining (7.5% per year). This industry is also predicted to contribute the most new jobs over the four years to 2016-17 (DEEWR, 2012). However, despite the positive projections released by DEEWR, a recent downturn indicates that the future of mining may not be so bright. The sector is experiencing an increase in the number of projects being put on hold, as well as a reduction in exploration budgets and cost blowouts. In the last 12 months, 18 projects have been either postponed or cancelled, including BHP Billiton's Olympic Dam expansion (Heber, 2013). According to a report produced by the Bureau of Resources and Energy Economics, Australia has also missed out on \$149 billion of resources projects spending (Bureau of Resources and Energy Economics, 2013).

This downturn appears to be having significant effects on employment in mining. For example, the average growth in employment in the year to November 2012 was 7.2% but in the five years prior was 15.6%, which is a substantial decline. As a result, DEEWR now predicts that employment growth for mining will be 4.3% per year in the five years to November 2017 (DEEWR, 2013a).

The Agriculture, Forestry and Fishing industry has experienced the largest decline in employment in the ten years to February 2012. In this industry there is expected to be a very modest growth of 0.3% per year to 2016-17 (DEEWR, 2012), which is less than the long-term general employment increase of 1.5% per year.

According to DEEWR, it is likely that overall employment will continue to grow more slowly than the long-term rate of 1.5% per year in the next few months (DEEWR, 2013b). As such, it could be said that the future of Australia's employment is somewhat unpredictable. Labour force participation rates are discussed in more detail below.

1.1.2 Labour force participation

In 2010-11, the labour force participation rate for males between the ages of 20 and 74 was 80% compared with 65% for females in the same age group. While the male labour force participation rate has remained stable between 2001-02 and 2010-11 for males, it has risen by 5% for females during the same period. This is largely due to an increase in women joining or returning to the workforce in part-time roles (ABS, 2012a).

The labour force participation rate varies over the life course, depending on gender. For males, the rate remains fairly high until around 60 years of age when retirement starts to be considered. For females, the labour force participation rate tends to slightly decrease between the ages of 25 and 44, to account for childrearing. Participation rates for males reach their peak between the ages of 25-44, whereas for females participation rates are the highest between the ages of 45-54 (ABS, 2012a).

1.1.3 Other workforce challenges

Despite DEEWR's positive forecasts in relation to Australia's future employment levels, it is well known that the population is aging and will present significant implications in the future, particularly in relation to the workforce. This can be attributed to two factors; the fact that families are having fewer children, and the increasing life expectancy of Australian citizens. In the last few decades, the birth rate has been below the replacement rate which means that without immigration the population will eventually begin to decline (The Treasury, 2003). Replacement fertility is estimated to be 2.1 children per woman, however, in 2010, the total fertility rate was 1.89 per woman (ABS, 2012b).

The second contributing factor to the aging population is that we are now expected to live longer (ABS, 2011a). In 1960, the life expectancy for males and females was approximately 68 and 74 years respectively (AIHW, 2013a). In 2013, the life expectancy for males is 79 years while for females it is 84 years (AIHW, 2013b). With fertility rates dropping and people living longer, it is inevitable that the Australian population will gradually get older.

Apart from labour force participation, population aging is predicted to impact Australia in areas such as health, housing and demand for skilled labour (Department of the Treasury, 2010). To address the challenges projected to occur as a result of the aging population, the Australian Treasury has listed the following as vital to address: lifting labour force participation rates, raising productivity and increasing the working-age population (Department of the Treasury, 2010).

1.2 'Current state' of the red meat livestock industry

This section describes employment and labour demand in the agriculture sector, and where possible in the red meat livestock industry specifically.

1.2.1 The importance of the agriculture industry

There are approximately 7 billion people in the world today. As this figure is projected to increase to 9.3 billion by 2050, the demand for food will increase markedly. According to Pratley (2008), there will be no significant increase in the availability of land that can be used for farming. As such there will need to be a substantial increase in the productivity of the agricultural sector in its place.

1.2.2 Overview of the Australian red meat livestock industry

According to the most recent Agricultural Census, there were 135,000 farm businesses throughout Australia in 2010-11. The largest proportion (28%) were involved in specialised beef cattle farming, while 9% were involved in mixed grain-sheep or grain-beef cattle farming. Specialised sheep farming was conducted by a further 8% of businesses (ABS, 2010-11a).

The livestock industry in Australia is also quite diverse in nature. Farms range from small (5 or fewer employees), often family-owned businesses, to very large (corporate and family) businesses. It is an extremely valuable industry to the Australian economy. Overall, the value of livestock production across both large and small Australian farms increased by 2% to \$7.3 billion in 2011-12, (ABS, 2011-12).

1.2.3 People employed in the Australian on-farm red meat livestock industry (demographics)

According to the Australian Bureau of Statistics, the red meat industry is one of the largest employers within agriculture, with grain, sheep and beef cattle farming combined employing

the highest proportion of the agriculture workforce in Australia (44 per cent), followed by horticulture and fruit growing (25 per cent) (Productivity Commission, 2005). It is estimated that the red meat sector employs up to 160 000 people across Australia (ABARE, 2009) and also provides thousands of indirect employment opportunities through industries that provide services and products (e.g. feed and machinery) to the industry.

However, overall the proportion of farmers in Australia's population has been decreasing in the last few decades as fewer young people take over the family farm and due to consolidation of smaller farms into larger businesses (ABS, 2012c). To put this into perspective, in the five years to 2011, there were 19,700 fewer Australian farmers, which is a decline of 11%. Natural events such as droughts and floods are likely to have played a part in this decline, as poorer yields and difficulties maintaining livestock numbers and quality resulted in fewer jobs during these periods (ABS, 2012c).

In 2011, women accounted for 28% of the farming workforce. The proportion of women in most other occupations has increased by 10% in the last 30 years, while the percentage of female farmers has instead remained relatively stable (from 30% in 1981 to 28% in 2011; ABS, 2012c).

1.2.4 Statistics and labour shortages in the Australian red meat livestock industry

Research conducted by the DEEWR has shown that the demand for labour in the agriculture industry overall grows by approximately 19,700 jobs per year. In 2008 it was predicted that the Sheep, Beef and Grain Farming industry will experience positive employment growth over the five years to 2014-15 (2.6 % or 20,600 jobs) (DEEWR, 2008). This increase in demand for labour, coupled with the decrease noted in the Australian farming workforce in past years suggests that the industry may be facing significant labour shortages.

1.2.5 Drivers shaping the demand for labour

There are several key factors that influence the demand for labour in agriculture, including the demand for red meat. Expansion of Australia's cattle herd was limited in 2013 due to poor seasonal conditions in the last six months of 2012. However, there was a significant increase in both beef and sheep exports recorded in the last quarter of 2013 (ABS, 2013b). In addition, it has been extensively documented that demand for protein in people's diets around the world is likely to increase in line with an ever increasing international rise in household income levels (PriceWaterhouseCoopers, 2011). This is likely to mean an increase in the demand for beef and sheep meat from many developing countries and improve Australia's export prospects, therefore increasing demand for labour.

The first Workforce Survey commissioned by MLA in 2007 reported on the increasing use of machinery and new technology among producers of red meat. In the five years to 2007, 75% of large farms, 67% of medium farms and 71% of small farms had increased their use of machinery and new technology that could result in less work needing to be done by farm labourers (Meat & Livestock Australia, 2008).

Another important factor shaping the agriculture industry's demand for labour is drought. Drought is a normal part of life on the land, but can have heavy impact on production due to lack of rainfall, and can lead to employment losses. For example, the 2002-03 drought saw a 15% decline in agriculture employment levels (Productivity Commission, 2005).

These statistics indicate that the future of the red meat industry (and the agricultural industry in general) is somewhat uncertain. With employment levels falling and the demand for labour impacted by changes to meat consumption, drought and technological change, the need for effective attraction and retention strategies is even more important.

1.3 Factors affecting attraction and retention

Many public sector organisations and private businesses around Australia experience difficulty attracting and retaining staff. Challenges can become exacerbated in rural and remote Australia, partly due to the fact that employment is geographically distanced from city attractions and services that are available in highly populated areas (McKenzie, 2011).

There is currently very little in the research literature examining attraction and retention factors in the red meat industry specifically, however there is some research emerging that explores the issues generally as well as specifically to agriculture.

1.3.1 Workplace culture and organisational factors

In 2012 a project was conducted by the International Specialised Skills Institute (2012) to explore different strategies for attraction and retention of staff in the red meat retailing industry. One of the aims of this project was to identify strategies used by employers in the USA and Canada. The main success factors identified for attraction and retention of staff in the US and Canadian red meat retailing industry included:

- Communication and engagement
- Training
- Mentoring
- Assimilation (of the immigrant labour force)
- Career pathways
- Flexibility of rosters
- Job stability

Although the retailing side of the red meat industry is very different in nature to that on the farm, these cultural and organisational issues were consistent with those identified as important for the on-farm red meat industry in the previous Workforce survey commissioned by MLA in 2007. Poor leadership and lack of communication were key reasons people left employers, as well as better career opportunities elsewhere. Similarly, a study exploring retention of staff on dairy farms found that retention was partly influenced by employers considering people and their capability and development as central to their farm business success (Nettle, Semmelroth, Ford, Zheng & Ullah, 2011).

1.3.2 Pay

In all areas of farming, as a business owner, the level of income or pay is usually dependent on the success of the farm, and often influenced by external factors such as weather. According to the ABS (2012c), farmers tend to work long hours (more than 50% work more than 49 hours per week) yet the average weekly disposable income of farmers in 2009-10 (\$568) was considerably lower than that of people working in other occupations (\$921).

Research on the relationship between turnover and dissatisfaction with pay, across occupations, is somewhat inconclusive. According to Mobley, Griffeth, Hand and Meglino (1979), there was often no relationship between pay and turnover in a range of studies conducted. In contrast, Griffeth, Hom and Gaertner (2000) found that pay and pay-related variables have a modest effect on turnover. The study also looked at the relationships between pay, turnover and a person's performance. The authors concluded that when high performers are inadequately financially rewarded, they leave an organisation.

When pay in an agriculture/farming context is considered specifically, the results are no clearer. A US study found that the probability of retaining farm workers increased when money was used to provide more benefits (perks/rewards) or improve working conditions rather than using it to increase wages (Gabbard & Perloff, 1997). However, a more recent

study in the Australian dairy farming industry (Nettle, et. Al, 2011) revealed that dairy farm employees were influenced to stay with their employer because they were promised, and experienced, higher than average wages in the industry for their role. In addition, the 2007 MLA commissioned workforce survey revealed that uncompetitive wages were among the key reasons why employees left their employers (for other employers in the industry).

1.3.3 Working conditions

As an occupation, farming tends to be characterised by a large proportion of people in self-employment and long working hours. In 2011, it was reported that about 50% of farmers worked 49 hours or more a week (ABS, 2012c).

Another aspect of working conditions on most livestock farms is being located in relatively remote locations. The context of the remote or rural environment can make any occupation a completely different experience than that experienced by urban workers, even those in the same industry. According to a study into the factors which influence the attraction and retention of nurses in rural and remote areas in Queensland, the most important factor that influenced respondents to leave rural or remote areas was isolation. Nearly 40% reported isolation caused by distance from basic services. Distance from family, friends and medical specialists, travelling long distances to social and commercial activities and lack of communication facilities such as the internet were all listed as contributing factors (Hegney, Rogers-Clark, Gorman, Baker and McCarthy, 2001). It could be reasonably argued that the aforementioned findings may also apply to some employees in the agriculture industry.

However, the remote environment could also be seen as an attracting factor. People in farming families are typically known for having a greater sense of belonging and connectedness to their local community than many others. This is reflected in the comparison of volunteering rates reported by the ABS (2012c) which indicate that people in farming families more than twice as likely as those in other families to do voluntary work (39% compared with 19%). The feeling of community connectedness (through friendships and support networks) and an emotional commitment to rural life has been found to influence worker's intention to stay among remote health professionals (Campbell, McAllister and Ely, 2012).

1.3.4 Competitive labour market

Agriculture faces heavy competition for labour from other industries. For example, there has been strong competition from the mining and construction industries (Gelade & Fox, 2008). Although there is no data available on loss of agriculture/farming workers to mining, it is seen as a problematic issue in some parts of the country (Lewis, 2013).

The agriculture industry also competes with the mining and construction industries in relation to pay and workplace benefits and when the average weekly full-time earnings are compared across the industries, there are significant differences (see Figure 1). For example, in the agriculture industry the average weekly full-time earnings are \$878 (Skills Info, 2013) while for the mining industry it is \$2360.90 (ABS, 2012d). Furthermore, the weekly wage for a full-time employee in the construction industry is \$1418.70 (ABS, 2012d). It should be noted that the differences may, in part, be related to differences in skills and qualification level.

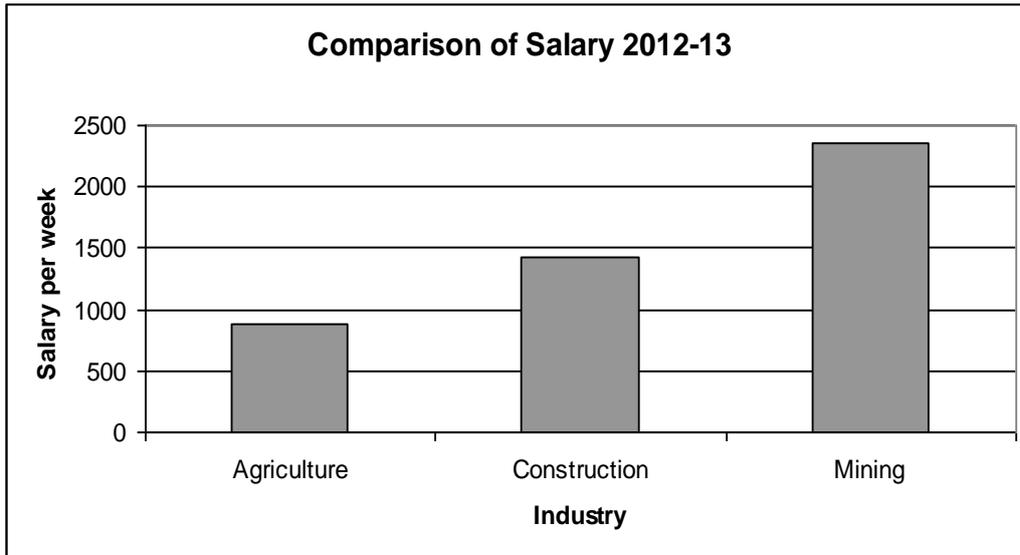


Figure 1. Comparison of industry salaries (Source: ABS 2012d; Skills Info, 2013)

Important findings related to mining and wages were released in the Workforce Survey conducted in 2007. In terms of attracting and recruiting staff, the survey found that 51% of employers in the red meat industry believed that the main reason behind their recruiting difficulties could be attributed to losing skilled workers to mining while 48% attributed their difficulties to low wages/salaries (Meat & Livestock Australia, 2008). With the average price for saleyard cattle falling to very low levels in 2012-13 (Meat and Livestock Australia, 2013a), farmers have reported that they are unable to compete with the lucrative salaries offered in the mining industry (Davy, 2013).

As well as higher salaries, the agriculture industry must also compete against the multiple strategies and campaigns used by the mining industry to recruit workers, including the promotion of career advancement opportunities, developments in occupational health and safety and lifestyle initiatives such as the benefits of fly-in/fly-out work. Added workforce competition from the construction industry is also occurring due to the current focus on improving Australia's infrastructure (Industries Development Committee Workforce, 2009).

The agricultural industry is also required to compete against other industries that are higher paying, less labour intensive and that have more attractive working hours. For example, 50% of farmers worked 49 hours or more per week in 2011 compared to 17% of other workers (ABS, 2012c). Additionally, according to the Workforce Survey 2007, 62.3% of those surveyed worked more than 51 hours per week. Longer working hours were also found to increase the rate of turnover and decrease the likelihood that employees would still be working for their employer in one year's time (Meat & Livestock Australia, 2008). Given the fact that the number of working hours in the average working week for Australians is 39.9 hours (ABS, 2012e), it is possible that the working hours required in agriculture may be off-putting for some prospective employees.

High employee turnover has also been reported to be a very significant issue in the agriculture industry. In 10% of the farms surveyed, turnover occurred among both full-time and part-time staff while 42% of those surveyed reported turnover among their full-time employees. Larger farms tended to report higher levels of turnover per year when compared to small and medium businesses. The average cost of turnover for a farm was reported to be approximately \$33,500 per employee (Meat & Livestock Australia, 2008).

1.3.5 Aging workforce

As previously mentioned, Australia faces the problem of an aging population which will have an adverse impact on the size of the nation's workforce. However, this problem is even more exacerbated in the agricultural industry, due to the fact that Australia's farmers tend to be significantly older than other workers (ABS, 2012c). According to data published by the Australian Bureau of Statistics, in 2011, the average age of an Australian farmer was 53 years old, while the average age for people in other occupations was 40 years old. This can be attributed partly to the fact that farmers are more likely than most other workers to continue to work beyond the average age of retirement. To put this into perspective, 23% of farmers were aged 65 years or more in 2011 compared with only 3% of people in other occupations (ABS, 2012c). A decline in younger generations willing to step into their parents' roles may be a reason behind this (Productivity Commission, 2005). Hence, the aging workforce is a significant concern for the agriculture industry and its supply of labour for the future (Industries Development Committee Workforce, 2009).

1.3.6 Environmental factors

It has already been mentioned that environmental issues such as drought can play a part in shaping the agriculture industry's demand for labour. In the past few years, drought and floods have had an extensive impact on the output of the agricultural industry and have been a major factor in declining employment. Drought affects the demand for cattle and sheep for restocking, the supply of meat, feed prices as well as saleyard prices (Fletcher, Buetre & Morey, 2009) and has caused farmers to sell their farms and relocate as a result of reductions in productivity, personal income and profit (Industries Development Committee Workforce, 2009).

According to the MLA commissioned Workforce Survey 2007, 24% of respondents in the red meat and wool industries reported that drought had decreased the number of full-time and temporary positions employed. Twenty-three percent of farms also reported that drought had caused the number of part-time people employed to decline (Meat & Livestock Australia, 2008). Floods have also had a serious impact on the Australian agricultural industry in Queensland in particular with initial estimates at more than 300 business affected (North Queensland Register, 2013). These types of uncontrollable weather related issues can be seen as a deterrent to workers from entering the industry and may also cause current employees to look for more viable career pathways.

1.3.7 Poor promotion of agriculture

Australian farmers are the most productive in the world on a per capita basis and agriculture is one of the most important industries for Australia economically. However, it a recent senate report into education and skills in Australia's agriculture and agribusiness sector has shown that this is not widely promoted or understood by most Australians (Pickles, 2012). The report indicated that a poor image associated with the agriculture industry can be a barrier when it comes to attracting and retaining people to work or study in the industry (Pickles, 2012).

According to the senate report, reasons for the image issue included a decline in education, along with competition from the mining sector, and an increasing disconnect between consumers and producers. There is also a perception that the agriculture industry is prone to natural disasters and relies heavily on assistance from the government which can be seen as a negative factor for those entering the workforce (Industries Development Committee Workforce, 2009). Career development opportunities are also deemed scarce and there is a belief that agricultural employment requires limited, if any, skills (Industries Development Committee Workforce, 2009; Pickles, 2012).

1.3.8 Attracting students to study agriculture

Research conducted by the Industries Development Committee Workforce has found that the number of students undertaking agriculture courses at university is decreasing and falls well below the market requirement. In fact, while there is an approximate demand of more than 2000 jobs per year for new graduates, less than 800 students are completing agriculture courses (Pratley and Copeland, 2008). According to Pratley (2008), the decline in the number of students studying agriculture at university may reflect a lack of understanding of the industry, which could stem from the minimal exposure students receive to agriculture at school. In addition, the perceived uncertainty of farming as a long-term career option (largely due to weather difficulties) has made some young people reluctant to enter the industry (Industries Development Committee Workforce, 2009).

A review of agricultural education and training in Victoria (Victorian TAFE Association, 2011) supported the view that there are not consistently strong pathways from school to tertiary VET studies and university for people with an interest in agriculture-related occupations. It must be noted, however, that VET level courses including apprenticeships and traineeships are generally increasing in enrolments in some states over the last 2-3 years (Victorian TAFE Association, 2011). These types of skills training formats include elements of off-the-job and on-the-job training under a formal contract of employment and may be more likely to lead to full employment. In 2009-2010 an increase in enrolments was reported for Certificates II, III and IV in Agriculture, as well as Advanced Dip of Agriculture and Cert III Rural Operations (Victorian TAFE Association, 2011). However, there were fewer enrolments in VET qualifications targeted to develop skills and knowledge in rural business management/agribusiness.

1.3.9 Urban migration

According to the Australian Bureau of Statistics (2011b), approximately 75% of Australia is classified as 'remote' or 'very remote' and the living conditions are often very dry and harsh. As a result, less than 3% of the country's population live in these areas (ABS, 2010), with an estimated 75% of the population living in a capital city (ABS, 2009). As most of the jobs in agriculture are rural-based, the declining rural population as people migrate to urban areas is also contributing to the difficulty in attracting and retaining workers in agriculture (Industries Development Committee Workforce, 2009).

1.4 Outlook for the future

The outlook for employment in the agriculture industry is uncertain. While DEEWR predicts modest growth for jobs in the industry in the next four years, unpredictable conditions such as climate variability make it difficult to project exactly what will happen to employment levels. It will therefore be particularly important to target areas that can be controlled, such as the image of the industry and the attraction of students into agriculture courses at universities or through VET options.

While the influence of pay level on turnover is inconclusive, there is little doubt that the attractive salary conditions in the mining and construction industry play a significant part in the agriculture industry's attraction and retention difficulties. The long hours associated with working in agriculture may also act as a deterrent for some employees.

An aging workforce and declining rural population, as people relocate to urban areas, are additional factors the agriculture industry must consider in its efforts to increase employment levels.

There is, however, a gap in recent literature and research around specific factors impacting attraction and retention of staff in the red meat livestock industry specifically, as no further research has been undertaken since the initial MLA commissioned study six years ago in 2007. There is a need to delve further into the issue as faced by employers in the current industry, determine how the situation has changed over time, and identify some practical strategies to address the current emerging issues.

Despite Australia's demographic changes and the sometimes poor image of agriculture as an employer currently, the industry remains a vital part of the Australian economy. Thus, if the industry is to make any progress, it needs to position itself as a highly attractive career option to the emerging generation of workers (Pratley, 2008). It is hoped that this research can assist employers achieve this objective.

2 Project objectives

2.1 Report purpose and description

As indicated by the literature, the low and declining availability of labour is a major constraint in the red meat industry. Low job application rates, high staff turnover and shortages of experienced labour increase labour costs and reduce enterprise efficiency.

A 2007 survey by MLA and AWI (B.NBP.0370) examined the issues affecting attraction and retention of skilled rural labour for the on-farm red meat industries. Based on a large scale survey of employers (owners and managers) and employees, the study provided empirical evidence about the attractors, motivators and de-motivators to employee choice about working in these industries and place of work and estimated the economic implications. Based on that study's findings, the subsequent report that was produced outlined options for addressing the challenges of attraction and retention at both the industry and farm levels.

It has been six years since the inaugural survey and MLA has commissioned Locher Human Resources to repeat the 2007 survey focusing separately on the northern beef sector and the southern sector (beef, lamb and sheep meat). This study will help clarify the most effective ways to attract, and retain, motivated and appropriately skilled people into the future, and to identify what has changed in the six years since the initial study.

2.2 Objectives

The research sought to examine the current key issues and trends impacting on attraction and retention of employees to the red meat industry, identify best-practice approaches to address the issues, and develop current and practical recommendations and strategies.

Specifically, the study's objectives were to:

1. Identify the factors (tangible and intangible) motivating and influencing on-farm employees to join, remain in, or leave individual employers in the on-farm red meat industry, including identifying the extent to which the mining industry acts as a major competitor for labour;
2. Provide six farm-level case studies that illustrate best-practice examples of critical elements of attracting and retaining staff;
3. Develop up-to-date recommendations and strategies to assist on-farm employers attract and retain labour in the red meat industry.

3 Methodology

The main project activity was a detailed survey of employees which provided data for comprehensive analysis and interpretation. The survey was complemented by a review of publications, reports and surveys on labour issues in rural Australia since the 2007 (B.NBP.0370) report was published. Consultation with red meat industry employers and employment agency operators was also an important component of the project.

3.1 Survey design and content

In order to be able to compare differences over time, the survey design needed to remain very similar to the 2007 survey (B.NBP.0370).

To ascertain the final design of the 2013 survey, the existing 2007 survey questions was reviewed and any associated feedback/reporting about its useability and the breadth of information collected. A preliminary literature review was conducted, focussing on key peer reviewed research articles and labour statistics published post-2007. This information assisted in determining new areas relevant to the focus of research.

This review process, as well as drawing on Locher's knowledge/understanding of best practice in survey design/methodology, resulted in several minor recommendations. This included the addition or removal of some questions and changes to others. The final survey design included some sections which all respondents were asked to respond to, and some that were separate sections for owners/managers and employees.

Information gathered from owners and managers included:

- Work experience
- Socio-demographic information
- Reasons for attraction to the industry and satisfaction with employment
- Business information including labour needs, information about shortages and challenges, staff turnover, time to fill a position, recruitment methods, and anticipated business changes.

Information gathered from employees included:

- Work experience
- Socio-demographic information
- Reasons for attraction to the industry and satisfaction with employment
- Reasons for leaving previous employer

3.2 Recruitment process

As in the 2007 survey, to qualify to complete the survey, enterprises had to employ at least one full-time employee in addition to family members. Recruitment ran from 22 Feb to 7 June 2013. Locher researchers contacted 1000 enterprises by phone from details obtained from the MLA member database. Of those contacted, 106 were ineligible because they were either feedlotters, did not employ any employees, or employed only family members. Of the remaining 894, a total of 320 organisations agreed to participate resulting in a participation rate of 35.8%.

To facilitate maximum participation, Locher worked with MLA and the Industry Communication and Engagement Group (ICE) within MLA to develop communication

strategies around key issues and project messages. Methods of communicating the survey (other than direct phone calls and emails) included:

- 2 x articles in MLA's Friday Feedback online newsletter (included survey online links)
- 1 x MLA's Feedback magazine article (included survey online links)
- 1 x article in Elders Express (included survey online links)
- 1 x blog article

Readers could access the survey online using the links provided in the publications above. This means that any owner/manager or employee could access the survey, which may have included some who were not included in the original list of MLA members contacted directly in the formal recruitment process.

Of those organisations willing to participate, several options for completion of the survey were offered. These included:

- Phone survey
- Self-administered questionnaire via hard copy
- Self-administered questionnaire via online

There were some difficulties getting organisations to agree to participate and then ensuring this resulted in actual completed responses. Some reasons for not participating included:

- Being 'over surveyed' (there were other surveys at the time and indications that some individuals receive several surveys from various organisations every week).
- Being too busy dealing with property issues and challenges
- Individuals personally felt disillusioned about the current state of the industry and were unsure if this could be improved by using a survey.

It was also very difficult to identify and gain access to ex-farm employees in the mining industry who were eligible. As a result only a very small sample of responses (n = 3) was gathered, and this sample was statistically too small to include in the report.

3.3 Sample profile

The sample profile achieved is outlined in Table 1. There was a fairly even distribution of respondents between the northern beef sector (n = 166) and the southern sector (n = 178).

Table 1. Sample profile of employment status by industry sector

<i>Industry Sector</i>	<i>Northern</i>	<i>Southern</i>	<i>Unknown</i>	<i>Total Red</i>	<i>Total Red</i>
	<i>Beef</i>	<i>Beef, Lamb, & Sheep Meat</i>		<i>Meat</i>	<i>Meat</i>
	2013	2013		2013	2007
	N	N	N	N	N
Owner/Managers	44	87	18	149	119
Managers	22	24	9	55	150
Employees	100	67	25	192	534
Total	166	178	52	396	803

The sample of 396 was much lower overall than that achieved in 2007 due to a number of factors described in section 3.2 above. However, the sample was more than adequate to produce reliable results. In total the sample contained 320 employers.

Table 2 and Figure 2 below represent the percentage of respondents according to property size for each industry sector. Please note that the definitions of business size used in this study replicate those used in the 2007 study to allow for comparison. These are as follows:

- Large enterprises - 15+ employees
- Medium enterprises - 6-14 employees
- Small enterprises - 5 or less employees

The 2013 study had a higher proportion of mid-sized businesses and a smaller proportion of large and small business than in 2007. The largest proportion of respondents overall were from small farms (47%). For the southern sector, small farms represented 60% of the total responses, but for northern beef the spread was more even with the highest proportion of responses coming from medium sized enterprises (38%).

Table 2. Sample profile of business size by industry sector

<i>Industry Sector</i>	<i>Northern Beef</i>	<i>Southern Beef, Lamb, & Sheep Meat</i>	<i>Red Meat Total</i>	
	2013	2013	2013	2007
	%	%	%	%
Large - 15+ employees	31.9	10.7	20.2	23.0
Medium - 6-14 employees	38.0	29.2	32.8	20.0
Small - 5 or less employees	30.1	60.1	47.0	57.0

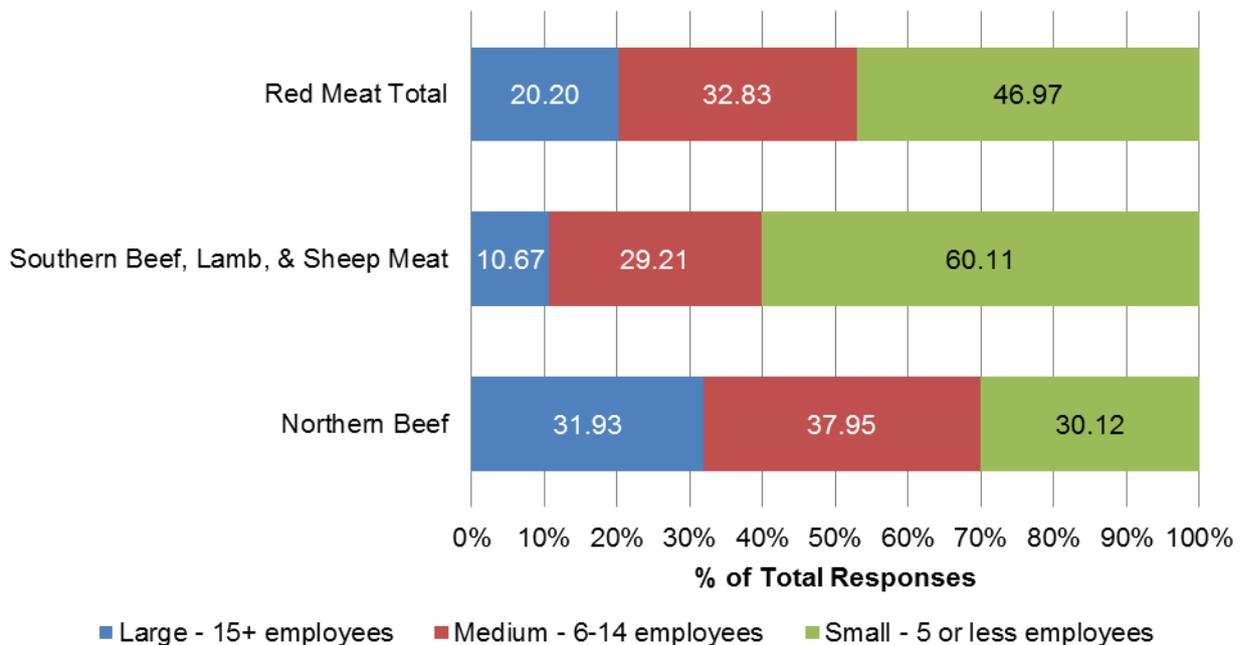


Figure 2. Property size by industry sector

Additional demographic information is available in Appendix A.

4 Results

Many public sector organisations and private businesses around Australia experience difficulty attracting and retaining staff. This section reports on the findings obtained from the 2013 Workforce Survey conducted by Locher Human Resources in relation to attraction and retention of workers in the unique context of the Australian red meat livestock industry.

When interpreting whole of industry data compared to sub-sectors, please note that some respondents did not provide information that allowed us to identify their location, therefore the total red meat responses do not equate to the sum of the two sub-sectors.

4.1 Attraction and retention impact

Owners and Managers were asked to indicate which has had the greater impact on their business, retaining workers or filling positions. Information about the type of impact (e.g. economical, social) was not collected. As seen in Figure 3, retaining workers was seen to have the greater impact in the northern beef sector (60%). This was also the greatest response for the southern sector.

Notably, these results suggest an increase in perceptions of the impact of retention of employees over time. In 2007, 48% of all red meat respondents felt that retaining workers had the greater business impact, while in 2013 this proportion was 57%.

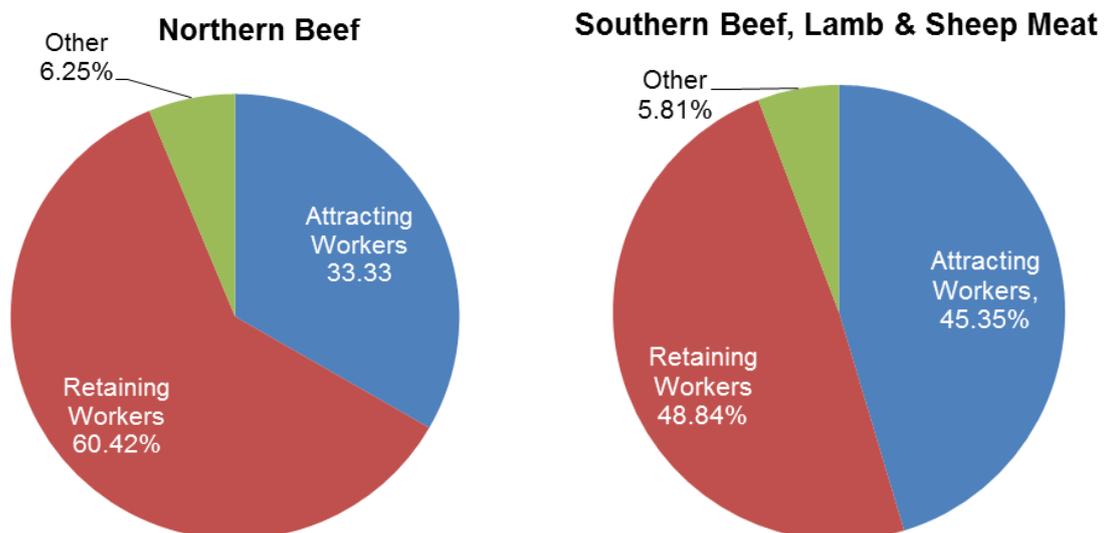


Figure 3. The impact of attraction and retention on business

4.2 Demand for labour

Figures 4, 5, and 6 show that the average number of full time vacancies per farm/property has significantly decreased since the first survey in 2007, across all farm sizes. This is consistent with current ABS employment data showing that the number of vacancies overall in Australia has declined (by 20%) since August 2007 to August 2013. Notably, the number of part time and temporary vacancies has increased over time for medium sized enterprises, while large and small farms experienced a decline or remained stable. Statistical analysis showed no significant differences in current demand for labour across sub-sectors, or across different farm sizes.

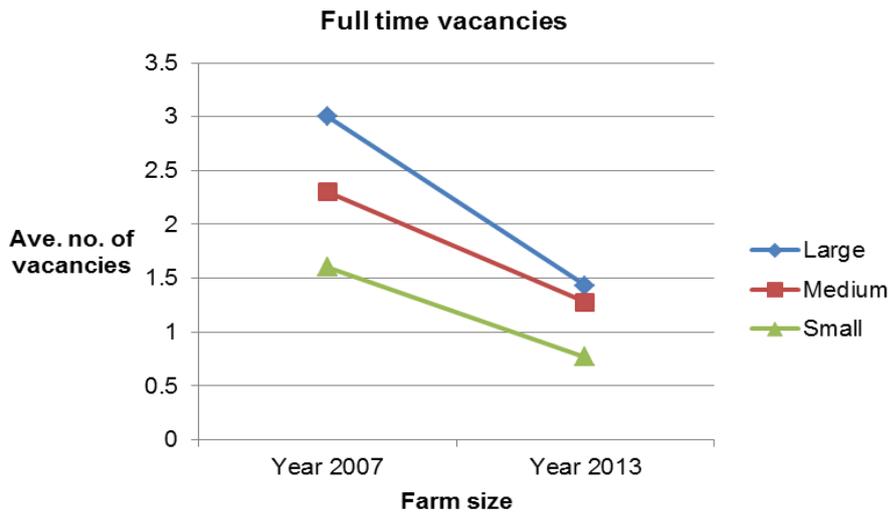


Figure 4. Average current full time vacancies per farm to be filled (by farm size)

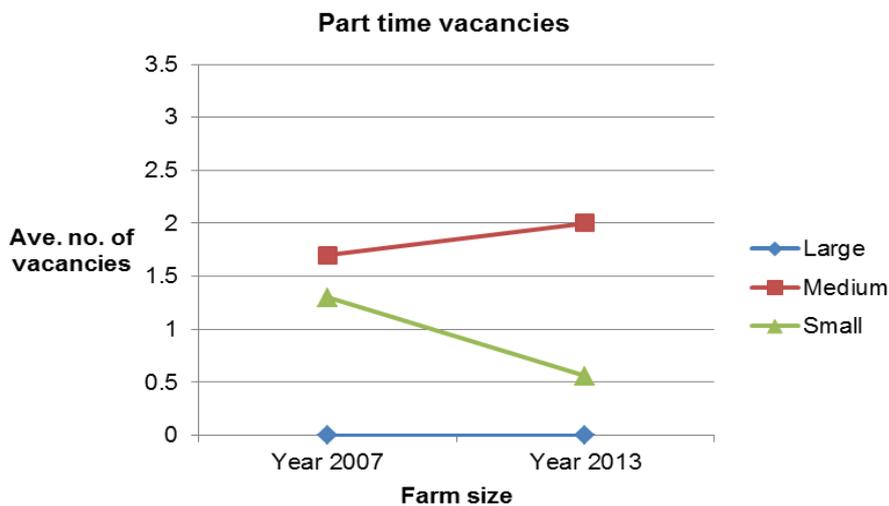


Figure 5. Average current part time vacancies per farm to be filled (by farm size)



Figure 6. Average current temporary vacancies per farm to be filled (by farm size)

To gauge the size of the current labour shortage, employers (owners/managers) were asked about the labour required, how many staff were currently employed and the number of positions the employer was actively trying to fill. This information allowed a comparison of the average number of required and actual full time equivalent (FTE) employees per farm.

The data show:

- Generally, there is a match between average number of required FTE employees and the actual number of FTE employees for all farm sizes except for large farms during peak periods. In peak time, large farms have a much larger shortfall than small and medium farms.
- In off-peak time, large farms actually have slightly too many FTE employees for the number required, medium farms have a slight shortage, and small farms have almost a match between actual and required staff.
- Additional statistical analyses (independent samples t-test) showed that the northern beef sector requires significantly more staff in peak time ($M = 10.29$ employees) than the southern sector ($M = 5.05$ employees). This is likely to be because northern beef data included a much larger proportion of large properties and strong seasonal requirements for labour.

Since the first study in 2007, the numbers of FTE employees (both required and actual) have declined in both peak and off-peak times for all farm sizes. In addition, 2013 data showed that actual FTE employee numbers were less than the required number for all farm sizes in peak time and for medium farm sizes in off-peak (see Figure 7).

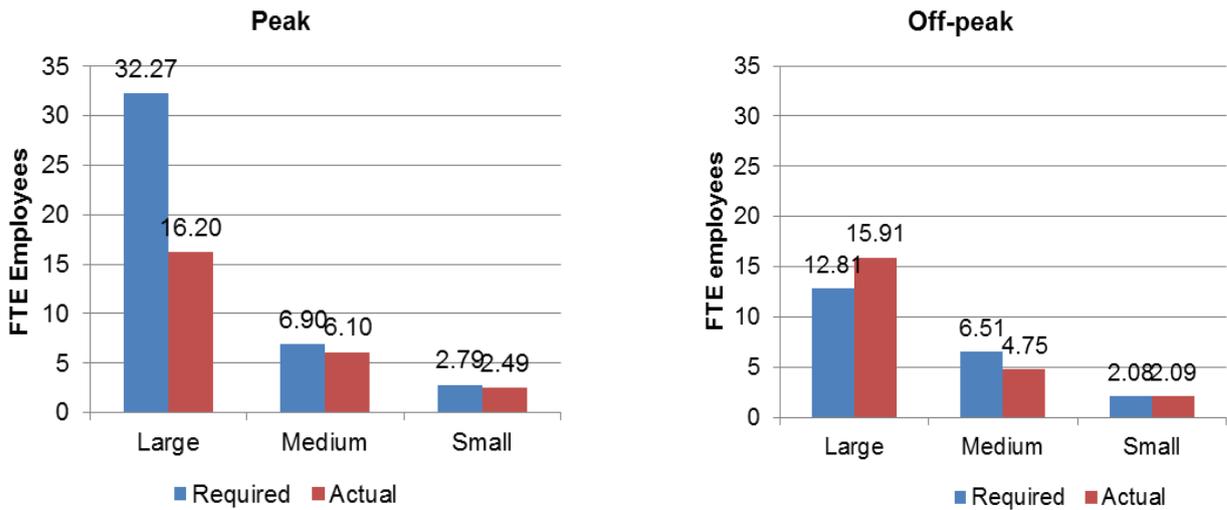


Figure 7. Comparison of average required and actual FTE employees per farm (overall)

Figure 8 below shows the average required and actual FTE employees per farm in the northern beef sector. The data show:

- The average number of required FTE employees is higher than the actual number of FTE employees for all farm sizes during peak periods.
- In peak time, large farms have a much larger shortfall than small and medium farms.
- In off-peak time, large farms actually have slightly too many FTE employees for the number required, while medium and small farms have a very slight shortage of staff.

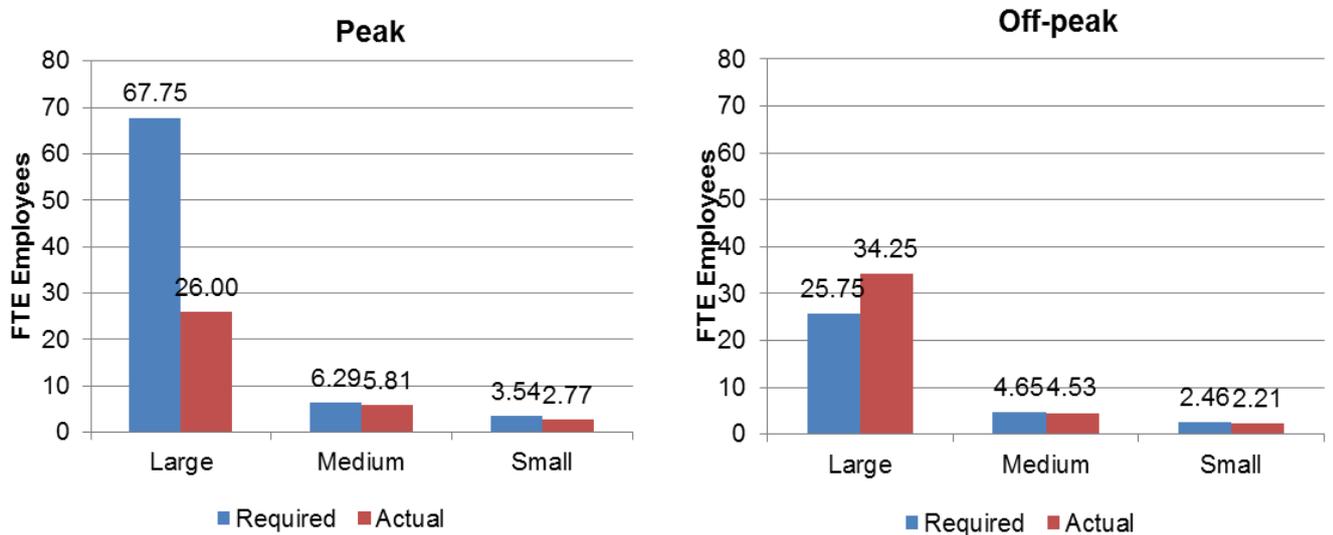


Figure 8. Comparison of average required and actual FTE employees per farm (northern beef)

Figure 9 shows the average required and actual FTE employees per farm in the southern sector. Findings show:

- The data suggests that in peak time, large farms in this sub-sector of the industry have too many FTE employees for the number required, which is very different to the

findings for the northern beef sector. *However, it must be noted that large farms had a small sample size for this question and the result is considered spurious*

- In peak time medium farms have a slight shortage, and small farms have a good match between supply and demand.
- Medium farms have a large shortfall between required FTE employees and actual number of FTE employees in off-peak time. The data suggests that medium farms have a slightly higher demand for labour off-peak than they do for peak time, however this result is within the sampling error and is not a statistically significant difference in demand.
- In off-peak time, large farms and small farms have a good match between actual and required staff.

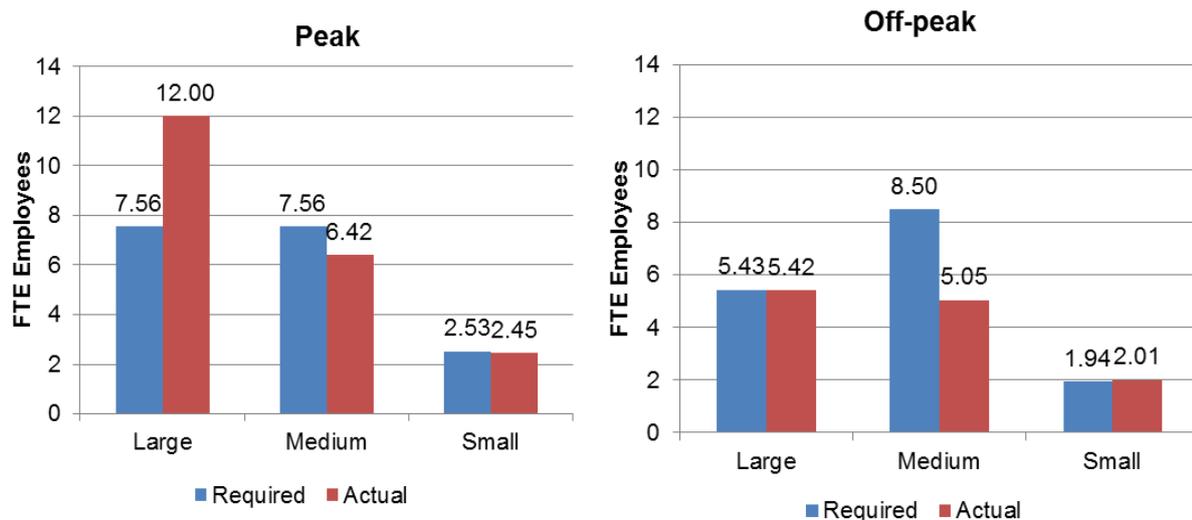


Figure 9. Comparison of average required and actual FTE employees per farm (southern sector)

Owners/managers were asked to provide feedback on how their labour requirements had changed over the last five years and how it was expected to change over the next five years. Figure 10 below provides a comparison of how this estimate has changed since the initial survey in 2007 to the current study in 2013. Notably, 54% of respondents in the 2013 study indicated they felt there had been an increase in labour requirements over the last 5 years, despite the decline over time in average number of required FTE employees. More producers in 2013, relative to 2007, saw demand increasing in the future – perhaps because their work force has declined.

When sub-sectors are analysed, the responses were similar to the overall results, with 49% of northern beef respondents and 51% of southern sector respondents indicating they felt there would be an increase in labour needed in the next 5 years. Only 11% of northern beef respondents and 4% of southern respondents believed there would be a decrease in labour demand.

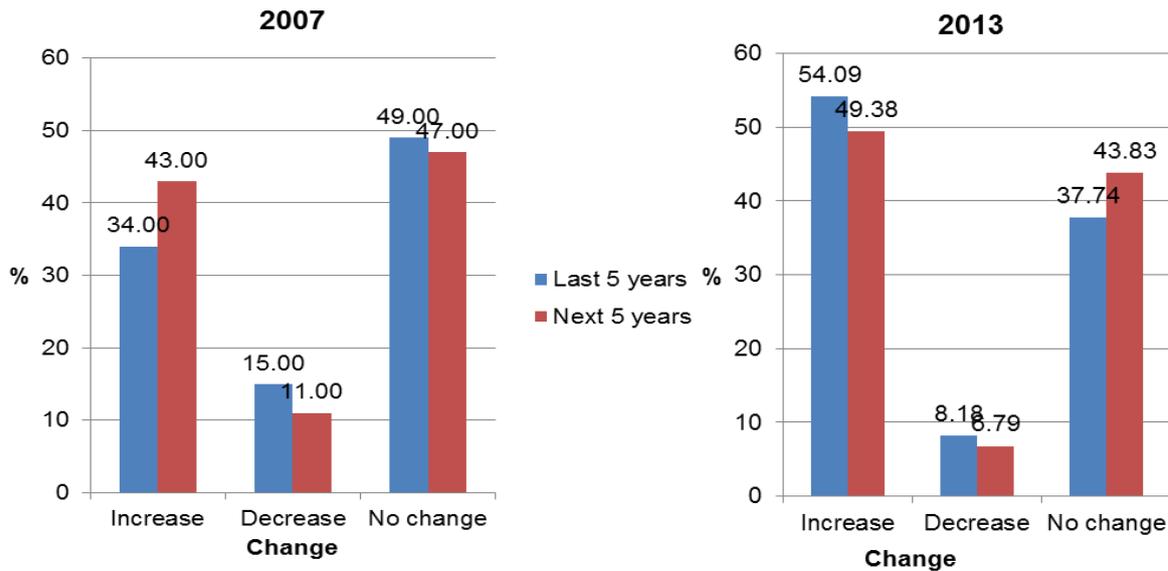


Figure 10. Proportion of producers (from both 2007 and 2013 surveys) reporting either an increase, a decrease, or no change in labour demand for either the immediate past, or future years

When the impact of drought on the number of people employed is examined (see Table 11), the majority of respondents reported that drought has had no impact on staffing levels, regardless of whether staff were employed full-time, part-time or as temporary employees. This is consistent with the results found in 2007.

Around 10% of farms did report that drought had decreased the number of people employed. This is a significantly lower proportion than reported in 2007, where around 25% of respondents indicated that drought had caused a decrease in number of staff. This suggests that although drought remains a factor influencing labour for some farm businesses, overall it is perhaps less of a major driver of labour demand than in previous years. This finding does not vary across sub-sector (see tables 4 and 5 below).

Table 3. Reported views of the impact of drought on the number of people employed (Red Meat Total)

	<i>No Impact</i>		<i>Decreased</i>		<i>Can't Say</i>	
	N	%	N	%	N	%
Full-time	123	87.9	11	7.9	6	4.3
Part-time	96	83.5	13	11.3	6	5.2
Temporary	83	83.0	12	12.0	5	5.0
Total	302		36		17	

Table 4. Reported views of the impact of drought on the number of people employed (Northern Beef)

Industry sector	Northern Beef					
	No impact		Decreased		Can't Say	
	N	%	N	%	N	%
Full-time	43	95.6	1	2.2	1	2.2
Part-time	30	88.2	2	5.9	2	5.9
Temporary	28	87.5	2	6.3	2	6.3
Total	101		5		5	

Table 5. Reported views of the impact of drought on the number of people employed (Southern Beef, Lamb, and Sheep meat)

Industry sector	Southern Beef, Lamb, & Sheep Meat					
	No impact		Decreased		Can't Say	
	N	%	N	%	N	%
Full-time	74	84.1	10	11.4	4	4.6
Part-time	63	81.8	11	14.3	3	3.9
Temporary	52	81.3	10	15.6	2	3.1
Total	189		31		9	

4.3 Attraction of staff

4.3.1 Difficulty with recruitment – the extent of the problem

Figure 11 shows that 72% of Owner/Manager respondents indicated that they have some degree of difficulty (a lot of difficulty or some difficulty) with recruitment during peak time, with 50% having difficulty during non-peak time. A one-way ANOVA analysis revealed no statistically significant difference in degree of difficulty across farm size.

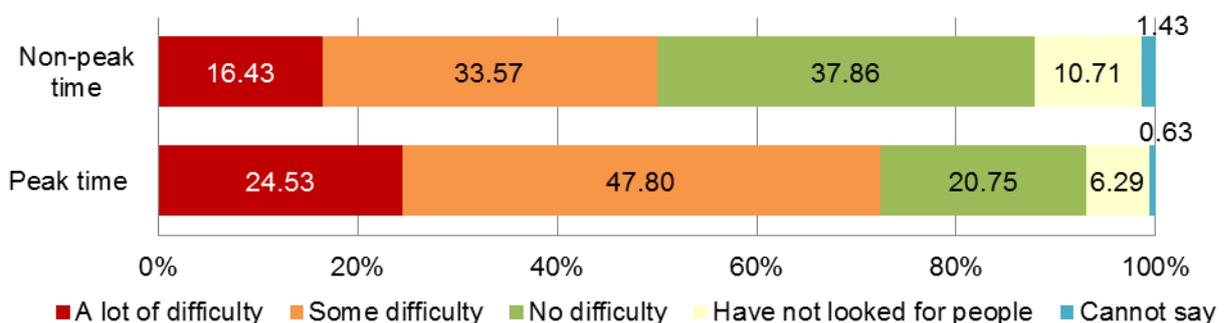


Figure 11. Level of difficulty with recruitment in non-peak vs peak time overall

As seen in Table 6 below, 72% of respondents in the northern beef sector had some degree of difficulty with recruitment in non-peak time, compared to only 39% of southern respondents. This suggests that non-peak recruitment is a much greater problem for producers in the north. Independent samples t-tests showed this difference is statistically significant ($t(115) = 3.52, p = .001$).

Table 6. Level of difficulty with recruitment in non-peak time – *breakdown by sector*

<i>Industry Sector</i>	<i>Northern Beef</i>		<i>Southern Beef, Lamb, & Sheep Meat</i>		<i>Red Meat Total</i>	
	N	%	N	%	N	%
A lot of difficulty	12	26.1	11	12.4	23	16.4
Some difficulty	21	45.7	24	27.0	47	33.6
No difficulty	8	17.4	42	47.2	53	37.9
Have not looked for people	5	10.9	10	11.2	15	10.7
Cannot say	0	0.0	2	2.3	2	1.4
Total	46		89		140	

When peak time difficulty is examined (see Table 15), over 90% of northern beef respondents reported they had some degree of difficulty with recruitment during peak time, compared to 64% for the southern sector respondents. This difference is statistically significant ($t(139) = 3.18, p = .002$) suggesting that although the problem is widespread across Australia, the northern beef sector experiences a much greater degree of difficulty during both non-peak and peak times.

Table 7. Level of difficulty with recruitment in peak time – *breakdown by sector*

<i>Industry Sector</i>	<i>Northern Beef</i>		<i>Southern Beef, Lamb, & Sheep Meat</i>		<i>Red Meat Total</i>	
	N	%	N	%	N	%
A lot of difficulty	18	34.6	20	20.0	39	24.5
Some difficulty	29	55.8	44	44.0	76	47.8
No difficulty	3	5.8	27	27.0	33	20.8
Have not looked for people	2	3.9	8	8.0	10	6.3
Cannot say	0	0.0	1	1.0	1	0.6
Total	52		100		159	

As shown in Table 15, station hands are the most difficult positions to fill followed by machine operators, across sub-sectors. This is consistent with the results found in 2007.

Table 8. Positions employers have trouble recruiting for in peak and non-peak time

<i>Industry Sector</i>	<i>Northern Beef</i>				<i>Southern Beef, Lamb, & Sheep Meat</i>				<i>Red Meat Total</i>			
	Peak		Non-peak		Peak		Non-peak		Peak		Non-peak	
	N	%	N	%	N	%	N	%	N	%	N	%
Driver	3	5.1	3	7.1	10	11.6	6	11.1	13	8.7	9	9.1
Other	4	6.8	4	9.5	10	11.6	5	9.3	14	9.4	9	9.1
Machine Operator	11	18.6	8	19.1	19	22.1	11	20.4	31	20.8	20	20.2
Station hand	41	69.5	27	64.3	47	54.6	32	59.3	91	61.1	61	61.6
Total	59		42		86		54		149		99	

It is also important to understand the perceived causes of these difficulties. Owner/managers were asked to report the causes of difficulties with recruitment (they could choose more than

one cause of difficulty) (Figure 12). The most commonly reported reason for recruitment difficulties was a perceived shortage of skilled people in the industry. Other contributing factors cited included low wages/salaries and losing workers to mining.

The common reasons for difficulty with recruitment have not changed significantly since 2007, where major difficulties were also reported to be shortage of skilled people, low wages, losing workers to mining and young people lacking a work ethic.



Figure 12. Perceived reasons for difficulty with recruitment (reported by owners/managers) – total red meat

A shortage of skilled people was the most common factor cited across all farm sizes. Interestingly, losing skilled workers to mining was seen as less of a problem by large enterprises relative to small or medium farms.

The top 3 perceived difficulties for each farm size were:

Large farms:

1. Shortage of skilled people in the industry (50%)
2. Lack of existing workers in the industry being skilled up (33%)
3. Wages/salaries are considered too low (28%)

Medium Farms:

1. Shortage of skilled people in the industry (46%)

2. Wages/salaries are considered too low (30%)
3. Losing skilled workers to mining (26%)

Small Farms:

1. Shortage of skilled people in the industry (37%)
2. Wages/salaries are considered too low (28%)
3. Losing skilled workers to mining (30%)

When differences in perceived difficulties between sub-sectors were examined (Table 9), losing skilled workers to mining and a shortage of skilled people in the industry (both 19%) were the top two recruitment difficulties for northern beef owner/managers. For southern producers, a shortage of skilled people in the industry was the most common perceived difficulty (26%).

Table 9. Perceived reasons for recruitment difficulties – breakdown by sub-sector

<i>Industry Sector</i>	<i>Northern Beef</i>		<i>Southern Beef, Lamb, & Sheep Meat</i>		<i>Red Meat Total</i>	
	N	%	N	%	N	
Shortage of skilled people in the industry	32	19.3	47	26.4	82	20.7
Wages/salaries are considered too low	22	13.3	32	18.0	58	14.7
Losing skilled workers to mining	32	19.3	20	11.2	56	14.1
Lack of existing workers in the industry who are being skilled up	11	6.6	26	14.6	38	9.6
Young people do not have strong work ethic	15	9.0	22	12.4	38	9.6
Workforce is ageing and/or retiring	12	7.2	23	12.9	35	8.8
Hard work is expected	11	6.6	17	9.6	30	7.6
Remote location	11	6.6	13	7.3	25	6.3
Losing skilled workers to other industries	7	4.2	17	9.6	24	6.1
Decline in perceived significance of agriculture	11	6.6	10	5.6	21	5.3
Location is not desirable	7	4.2	10	5.6	17	4.3
Jobs are not appealing	1	0.6	10	5.6	11	2.8
Negative media portrayal of hardships of working on the land	2	1.2	4	2.3	6	1.5
Concerns about drought/flood/ weather	1	0.6	0	0.0	1	0.3
Total	166		178		396	

4.3.2 Attraction and recruitment methods

In the current study, a question around recruitment methods was added to ascertain effectiveness of recruitment/advertising methods. Owner/managers were asked to indicate which methods they used and could select more than one. Table 10 shows that the most common method used regardless of farm size was 'asking local people' (41%). Placing an advertisement in a newspaper other than the local newspaper was reported to be the second most common method while online advertising (e.g. SEEK) was used by just 6% of all farms surveyed.

Table 10. Recruitment methods used by farm size

<i>Size of farm/property</i>	<i>Small</i>		<i>Medium</i>		<i>Large</i>		<i>Total</i>	
	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>
Asking local people I/we know	88	44.7	28	37.8	9	27.3	125	41.1
Advertisement in non-local newspaper	34	17.3	12	16.2	7	21.2	53	17.4
Advertisement in local newspaper	26	13.2	9	12.2	3	9.1	38	12.5
Asking for referrals from current employees	25	12.7	9	12.2	3	9.1	37	12.2
Through rural recruitment agency	15	7.6	10	13.5	7	21.2	32	10.5
Online advertising, e.g. SEEK	9	4.6	6	8.1	4	12.1	19	6.3
Total	197		74		33		304	

Table 11 demonstrates the recruitment methods used according to industry sector. The most common method of recruiting was 'asking local people I/we know' for both the northern (39%) and southern (41%) sectors. 'Asking for referrals from current employees' was the second most common recruitment method for both sectors.

To assess the effectiveness of recruitment methods, we tested whether the methods used were associated with the level of difficulty with recruitment reported by employers. Those employers who advertised in a non-local newspapers had significantly more difficulty with recruitment than other employers in peak time ($t(146) = 2.28, p = .024$), suggesting this may not be an effective recruitment methodology. In addition, employers who recruited through a rural recruitment agency had significantly more difficulty than those who did not during non-peak time ($t(120) = 2.06, p = .041$).

Table 11. Recruitment methods used by employers – breakdown by sector

<i>Industry sector</i>	<i>Northern Beef</i>		<i>Southern Beef, Lamb, & Sheep Meat</i>		<i>Total</i>	
	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>
Asking local people I/we know	37	39.0	81	40.9	125	41.1
Advertisement in non-local newspaper	7	7.4	30	15.2	53	17.4
Asking for referrals from current employees	21	22.1	31	15.7	52	17.1
Advertisement in local newspaper	12	12.6	24	12.1	38	12.5
Through rural recruitment agency	7	7.4	12	6.1	32	10.5
Online advertising, e.g. SEEK	11	11.6	20	10.1	19	6.3
Total	95		198		304	

In terms of how employees heard about their current position, Table 12 shows that, for most employees and (non-owner) managers, they became involved in the business because it is a family business (especially for those in the southern sector). Being approached directly by an employer was also a common way of gaining employment, which aligns with the data provided by employers (see Table 18 above). Very few respondents in any of the industry sectors heard about their current position through a recruitment agency.

Table 12. How employees and (non-owner) managers heard about their current position – breakdown by sub-sector

<i>Industry Sector</i>	<i>Northern Beef</i>		<i>Southern Beef, Lamb, & Sheep Meat</i>		<i>Red Meat Total</i>	
	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>
	It's my family business	21	17.5	31	27.9	65
Approached directly by employer	25	20.8	24	21.6	56	20.4
Through family	24	20.0	18	16.2	48	17.2
Through a friend	20	16.7	15	13.5	42	14.7
Saw a job advertisement in a newspaper	13	10.8	12	10.8	29	10.9
Saw a job advertisement online	9	7.5	9	8.1	25	8.8
Through a recruitment agency	8	6.7	2	1.8	10	3.9
Total	120		111		275	

Some 'other responses were also collected, these included:

- Asked directly/rang up and asked for work
- Applied online (large farms only)
- Saw a magazine advertisement
- Saw an advertisement on facebook/social media
- Transfer to new station/farm with current employer

When differences between farm size were analysed, it was found that, for large and medium farms, many people heard about their current role because they were approached directly or heard about it through a friend (referral). For smaller farms, employment was more family focussed, with most people entering the job because it was a family business. Interestingly, seeing a job ad online had some success for medium-sized farms.

The top three methods of hearing about their position by farm size were:

Large Farms:

1. Through family (28%)
2. Approached directly (25%)
3. Through a friend (19%)

Medium Farms:

1. Approached directly (27%)
2. Saw a job ad online (19%)
3. Through a friend (17%)

Small Farms:

1. Its my family business (40%)
2. Through family (18%)
3. Approached directly, saw a job in a newspaper (both 12%)

4.3.3 Reasons for attraction

To understand how we can better attract people to the industry, it is also important to consider what employees look for in a job and occupation. All respondents were asked to indicate what attracted them and could select more than one attraction.

Family background, lifestyle, working outdoors and working with animals are the key attractions to working in the red meat industry (see Figure 13). These were consistent for industry sub-sectors as shown in Table 13.

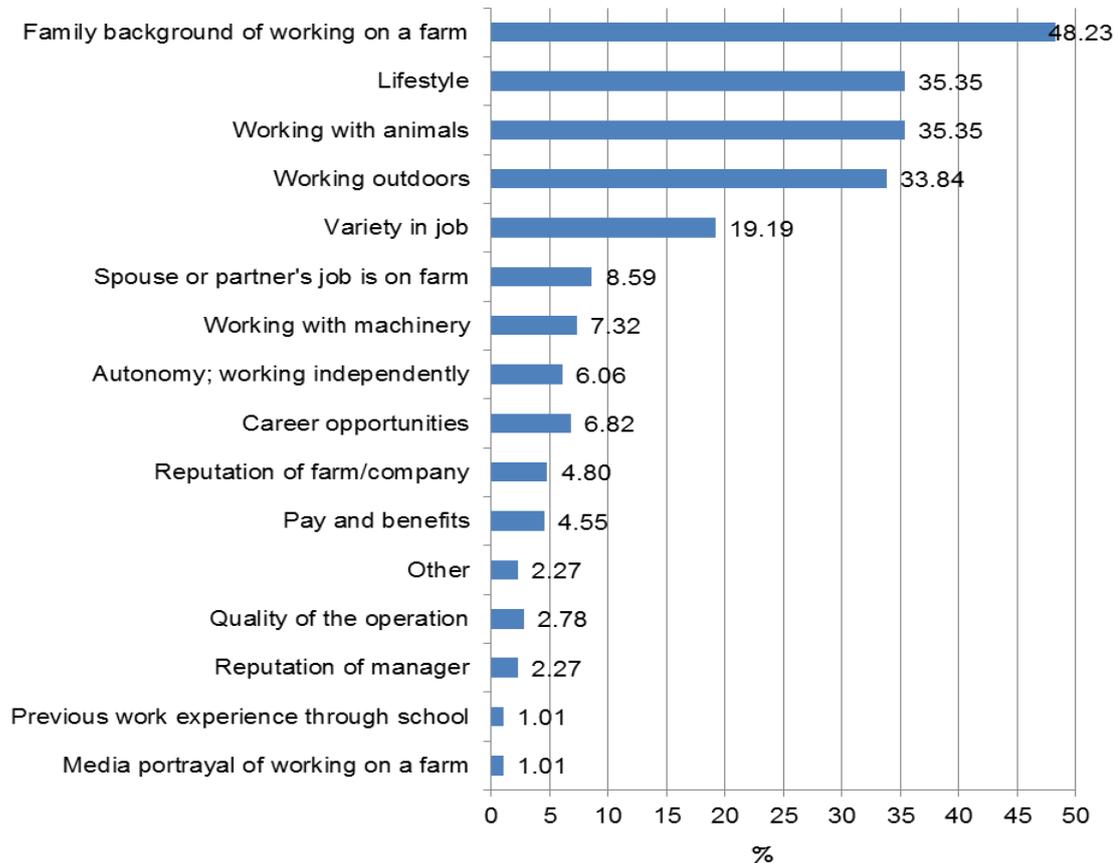


Figure 13. Top attractions to a farm job or career in the livestock industry overall

There were fairly similar reasons regardless of farm size. The top 3 attractions to the on-farm red meat industry for each farm size were:

Large

1. Lifestyle (58%)
2. Family background working on a farm (56%)
3. Working with animals (46%)

Medium

1. Lifestyle (52%)
2. Family background working on a farm (47%)
3. Working outdoors (38%)

Small

1. Family background working on a farm (46%)
2. Lifestyle (34%)
3. Working with animals (32%)

Table 13. Top attractions to a farm job or career in the livestock industry – by sector

<i>Industry Sector</i>	<i>Northern Beef</i>		<i>Southern Beef, Lamb, & Sheep Meat</i>		<i>Red Meat Total</i>	
	N	%	N	%	N	%
Family background of working on a farm	85	51.2	77	43.3	191	48.2
Working with animals	69	41.6	52	29.2	140	35.4
Lifestyle	80	48.2	70	39.3	140	35.4
Working outdoors	60	36.1	54	30.3	134	33.8
Variety in job	31	18.7	33	18.5	76	19.2
Spouse or partner's job is on farm	16	9.6	12	6.7	34	8.6
Working with machinery	12	7.2	12	6.7	29	7.3
Career opportunities	16	9.6	8	4.5	27	6.8
Autonomy; working independently	3	1.8	13	7.3	24	6.1
Reputation of farm/company	12	7.2	4	2.3	19	4.8
Pay and benefits	7	4.2	8	4.5	18	4.6
Quality of the operation	4	2.4	4	2.3	11	2.8
Reputation of manager	6	3.6	2	1.1	9	2.3
Other	5	3.0	2	1.1	9	2.3
Media portrayal of working on a farm	2	1.2	1	0.6	4	1.0
Previous work experience through school	1	0.6	2	1.1	4	1.0
Total	166		178		396	

'Other' responses included:

- Location
- Opportunity to live and work with family
- Opportunity to learn about a different production system
- My husband owned a dairy farm
- This is a family owned business
- I was managing the property when they bought it
- I was born here and have worked and loved this land all my life
- A personal commitment to land reclamation
- Opportunity to be involved in and own and manage a highly profitable business

There were fairly similar reasons regardless of farm size. Lifestyle, and the reputation of the farm/company were seen as attractors across all farm sizes.

As well as industry attractions, the top attractions to specific employers were also identified. These included lifestyle, the farm or company's reputation, working with animals and variety in the job (see Figure 14). Note again that respondents could choose more than one option. These findings are similar to the results found in 2007, although in 2007 career opportunities were seen as an attraction by a greater proportion of respondents than in 2013.

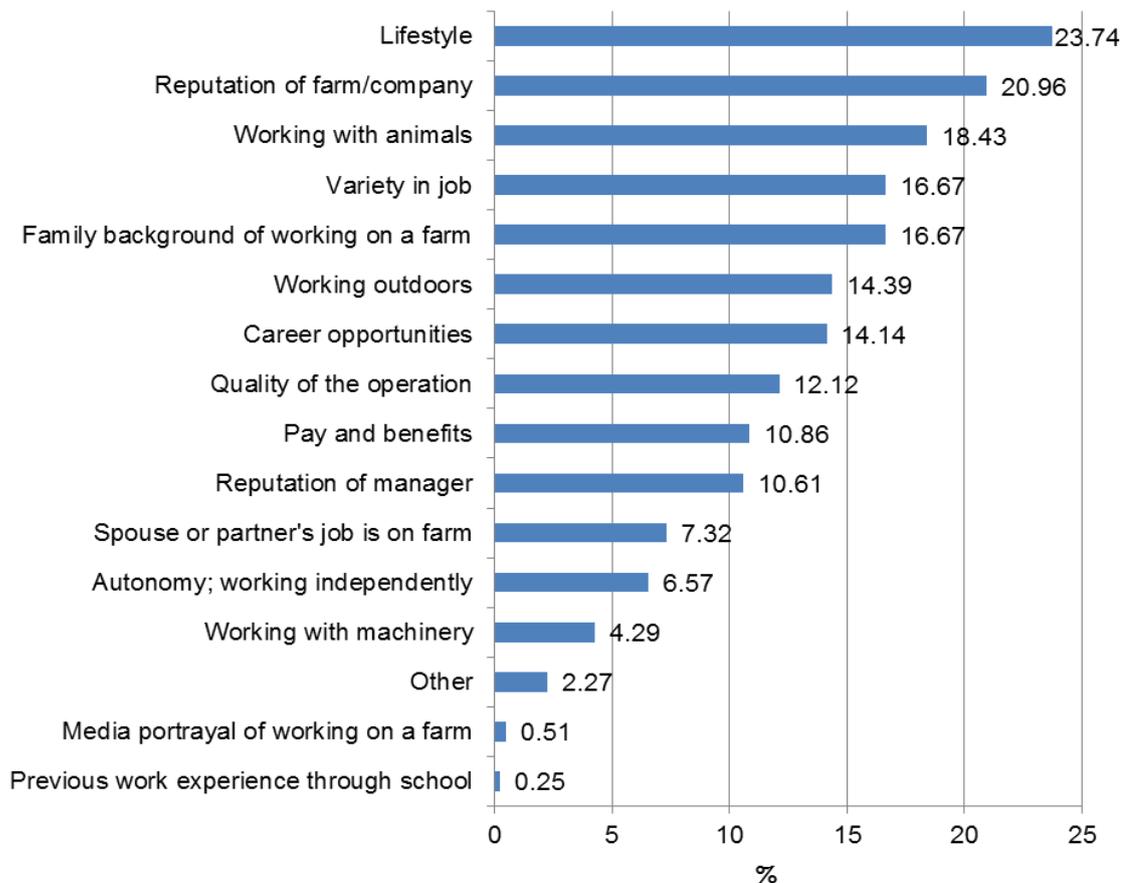


Figure 14. Top attractions to a specific employer (overall)

The top 3 attractions to a specific employer for each farm size were:

Large

1. Lifestyle (40%)
2. Reputation of farm/company (34%)
3. Variety in job (24%)

Medium

1. Lifestyle (25%)
2. Reputation of farm/company, working outdoors and working with animals (all 20%)
3. Variety in job (19%)

Small

1. Working with animals (17%)
2. Reputation of farm/company (16%)
3. Lifestyle (16%)

When the two sectors are compared (Table 14), lifestyle and reputation of the farm/company were the most commonly identified attractors across sub-sectors. Career opportunities was more of an attraction for northern beef respondents, while quality of the operation was more of an attraction for southern respondents.

Table 14. Top attractions to a specific employer - by sub-sector (% of total responses)

<i>Industry Sector</i>	<i>Northern Beef</i>		<i>Southern Beef, Lamb, & Sheep Meat</i>		<i>Red Meat Total</i>	
	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>
Lifestyle	51	30.7	33	18.5	94	23.7
Reputation of farm/company	44	26.5	34	19.1	83	21.0
Working with animals	30	18.1	31	17.4	73	18.4
Variety in job	35	21.1	25	14.0	66	16.7
Family background of working on a farm	27	16.3	27	15.2	66	16.7
Working outdoors	27	16.3	19	10.7	57	14.4
Career opportunities	33	19.9	19	10.7	56	14.1
Quality of the operation	16	9.6	26	14.6	48	12.1
Pay and benefits	16	9.6	23	12.9	43	10.9
Reputation of manager	27	16.3	9	5.1	42	10.6
Spouse or partner's job is on farm	13	7.8	10	5.6	29	7.3
Autonomy; working independently	6	3.6	14	7.9	26	6.6
Working with machinery	5	3.0	10	5.6	17	4.3
Other	5	3.0	2	1.1	9	2.3
Media portrayal of working on a farm	1	0.6	1	0.6	2	0.5
Previous work experience through school	0	0.0	1	0.6	1	0.3
Total	166		178		396	

4.4 Retention of employees in the red meat industry

4.4.1 Turnover

To better examine the issue of retention, several points of information were gathered from both owners/managers and employees to gain a sense of the extent of the problem and how businesses have been affected.

Table 15 shows the annual employee turnover by farm size as estimated by employers. The turnover of full-time employees on large and small farms has not changed markedly since 2007 while for medium farms it has decreased. For part-time employees, turnover has increased for all farm sizes.

Table 15. Employer estimated annual turnover by farm size

		2007				2013			
		Large	Med	Small	Total	Large	Med	Small	Total
		N				N			
Ave turnover per farm (persons)	Full-time	9.5	4.1	0.9		11.9	1.85	0.6	
	Part-time	7	3.8	0.8		2.7	1.5	1.0	
Ave employees per farm (persons, peak)	Full-time	29.5	9.0	1.4		32.3	6.9	2.8	
	Part-time	5.8	2.1	1.9		6.3	8.3	1.9	
Total turnover (all farms)	Full-time	548				176.7			
	Part-time	120				72			
Number of farms that answered the question	Full-time	12	32	79	123	9	21	52	82
	Part-time	2	9	49	60	6	10	40	56

4.4.2 Employee commitment

In order to provide an indication of whether or not there are potential problems with retention, it is also necessary to investigate current employee intentions for the future.

Figure 15 displays the results to the question “Do you see a long term future at your farm/station/company?” The majority of respondents (61%) indicated that they did see a long term future at their current place of employment. This is a slightly higher proportion than in 2007 which is encouraging. There was also a reduction in the number of people indicating that they did not see a long term future with their employer.

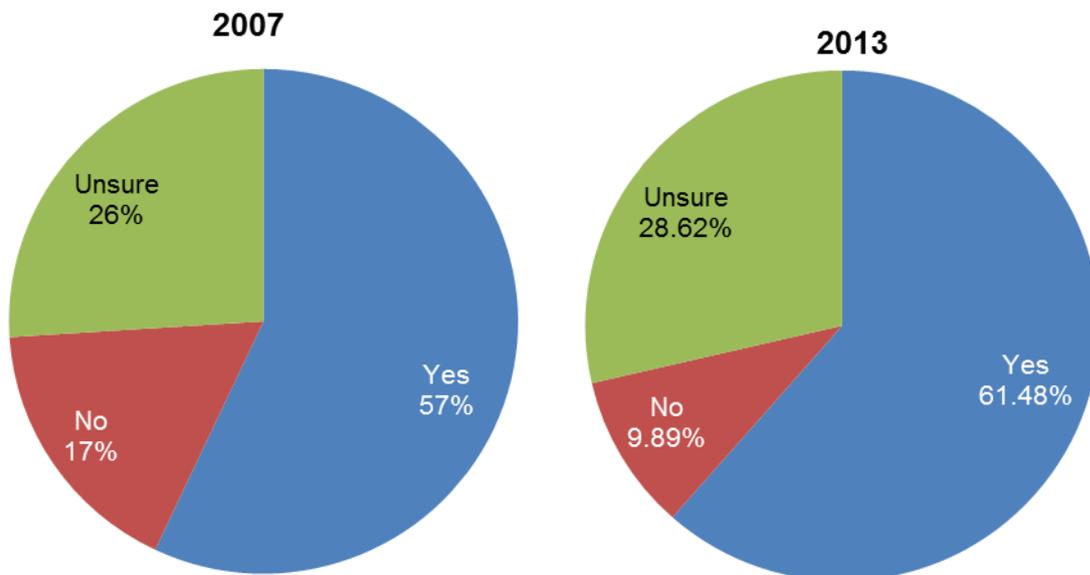


Figure 15. Overall responses - “Do you see a long term future at your farm/station/company?”

Employee intentions for the future were also broken down by industry sector (Table 16). The majority of respondents in all sectors reported that they do see a long-term future with their current employer. A slightly lower proportion of Northern Beef employees saw a future with their current employer.

Table 16. Number of respondents who see a long-term future at their farm/station/company – breakdown by sector

<i>Industry Sector</i>	<i>Northern Beef</i>		<i>Southern Beef, Lamb, & Sheep Meat</i>		<i>Red Meat Total</i>	
	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>
Yes	76	55.9	83	69.2	174	61.5
No	14	10.3	12	10.0	28	9.9
Unsure	46	33.8	25	20.8	81	28.6
Total	136		120		283	

To identify factors associated with employees seeing a future with their current employee, a series of correlation analyses were conducted. Findings are summarised below.

People who saw themselves having a long term future with the business were more likely ($P < 0.05$) to have:

- Higher morale.
- Higher levels of engagement.
- A higher level of job satisfaction.
- Experienced strong leadership and clear direction.
- Experienced working as a team.
- Experienced a safe and healthy working environment.
- Believed they got fair pay for the work they do.
- Believed that their immediate supervisor listens to them and encourages ideas.
- Believed that that their job made good use of their skills and abilities.
- Experienced a balance of work and leisure.
- Believed that that they were trusted and valued as a person.
- Experienced recognition for a job well done.
- Experienced regular feedback on their performance.
- Believed that they could contribute to decisions made at work.
- Believed that poor performance was dealt with effectively.
- Understood what was expected of them at work.
- Believed the business was committed to environmentally sustainable use of resources.
- Believed that the team is open and honest with each other.
- Been encouraged to participate in community events.
- Opportunities to get ahead in their career.
- Believed that their workload is manageable.
- A community atmosphere at work.
- Believed that conditions of employment are fairly managed.
- Experienced effective communication between managers and staff.
- Consider their job was interesting.
- Believed that they have a good relationship with their manager/supervisor.
- Believed that they have a good relationship with their colleagues/team.
- Believed that they are provided with enough opportunities for formal training.
- Plenty of opportunities to socialise.

- Perceived that their manager was concerned with procedures, rules, budgets and the bottom line
- Perceived that their manager was concerned with developing individuals and building a supportive environment.
- Perceived that their manager was concerned with the business' future direction and opportunities for future growth.
- Perceived that their manager was concerned with setting performance targets and achieving results.

For the **northern beef** sector, those who intend to stay for the long term were more likely to have:

- Higher engagement.
- Higher morale.
- Higher overall job satisfaction.
- Experienced recognition for a job well done.
- Believed they contribute to decisions made at work.
- Pride in working for the station/company.
- Believed that their manager is concerned with procedures, rules, budgets and the bottom line.
- Believed that their manager is concerned with direction and future growth of the company.

This correlation analysis was conducted separately for different farm sizes for the northern beef sector. The results are shown in Table 17.

Table 17. Most significant (P<0.05) drivers of employee commitment for the northern beef sector by farm size

Large farms	Medium Farms	Small Farms
Working as a team	Being proud to work for the company/station	Being proud to work for the company/station
Receiving fair pay for the work done	Contributing to decisions made at work	Contributing to decisions made at work
Being proud to work for the company/station	Recognition for a job well done	Having a team that is open and honest with each other
Understanding what is expected	Having a team that is open and honest with each other	Feeling that communication is good between managers and staff
Having a team that is open and honest with each other	Feeling that communication is good between managers and staff	Recognition for a job well done

For the **southern** sector, those who intend to stay for the long term were more likely to have:

- Higher engagement.
- Believed that there is strong leadership and clear direction for the business.
- A job that makes good use of abilities.
- Experienced recognition for a job well done.
- Pride in working for the station/company.
- Believed they have a team that is open and honest with each other.
- Believed they have fair conditions of work.

- Felt that communication is good between managers and staff.

This analysis was also conducted separately for different farm sizes in the southern beef, lamb and sheep meat sector. The results are shown in Table 18.

Table 18. Drivers of employee commitment for the southern beef, lamb and sheep meat sector by farm size

Large farms	Medium Farms	Small Farms
Good relationships with colleagues	Being proud to work for the company/station	Having the equipment and resources to do the job
Opportunities to get ahead in my career	Recognition for a job well done	Feeling communication is good between managers and staff
Committed to environmentally sustainable use of resources	Conditions of employment applied fairly and consistently	Having a job that makes good use of abilities
Feeling that communication is good between managers and staff	Overall engagement	Managers are concerned with setting performance targets and achieving results
Strong leadership and clear direction for the business	Immediate supervisor listens and encourages ideas	Working as a team

In order to more fully gauge the nature of employees' intentions for the future, respondents were also asked where they see themselves in the next year as well as in five years' time (Figure 16). Only a small number indicated they would leave the industry.

Overall, the majority of employees (63%) saw themselves with the same employer in the same job in the next year, but only 37% of employees also saw themselves with the same employer and same job in 5 years' time .Fifteen % of employees saw themselves leaving their current employer within the next year while 29 % saw themselves leaving in the next five years.

Notably, despite the fact that 14 % of managers listed losing skilled workers to mining as one of their perceived reasons for recruitment difficulties, only 1.5% of employees reported that they see themselves working in the mining industry in one year, and only 1.4% in 5 years' time (Table 19). These findings are consistent with the results found in 2007 and indicate that competition from the mining industry is much less important than first thought.

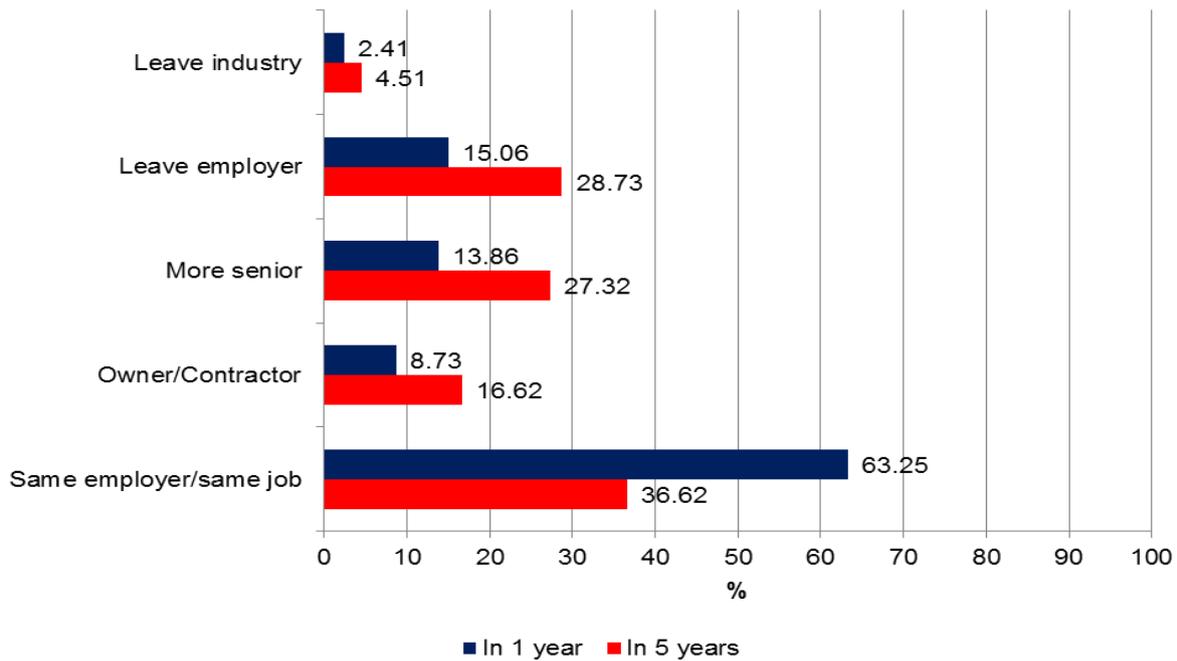


Figure 16. Overall responses to “Where do you see yourself in the next one year... five years?”

Results were similar across sub-sectors as shown below in Table 26.

Table 19. Where employees see themselves in 1 year

Industry Sector	Northern Beef		Southern Beef, Lamb, & Sheep Meat		Red Meat Total	
	N	%	N	%	N	%
Same job with the same employer	77	49.0	66	47.5	159	47.8
Same job, better qualified	18	11.5	15	10.8	34	10.2
Other	13	8.3	7	5.0	21	6.6
More senior job, better qualified	8	5.1	9	6.5	21	6.3
Farm Owner	5	3.2	13	9.4	21	6.3
Same job with a different employer	7	4.5	9	6.5	17	5.1
More senior job	7	4.5	6	4.3	16	4.8
In a permanent job	3	1.9	5	3.6	9	2.7
Doing a completely different job in the industry	6	3.8	2	1.4	9	2.7
Leaving the industry	4	2.6	1	0.7	8	2.4
Becoming a contractor	5	3.2	2	1.4	8	2.4
Working in the mining industry	3	1.9	1	0.7	5	1.5
Retired	1	0.6	3	2.2	4	1.2
Total	157		139		332	

Table 20 shows where employees and owner/managers see themselves in five years time for each industry sector. While 25% of southern industry respondents saw themselves remaining in their current job, only 12% of northern respondents reported the same expectation. A similar proportion (20-22%) in both sectors saw themselves in a more senior job, with or without better qualifications. A much higher proportion of northern respondents saw themselves as being with a different employer, or doing a different farm role, being a contractor, or being in a different industry or situation (37% v 16%).

Table 20. Where employees and owner/managers see themselves in 5 years

<i>Industry Sector</i>	<i>Northern Beef</i>		<i>Southern Beef, Lamb, & Sheep Meat</i>		<i>Red Meat Total</i>	
	N	%	N	%	N	%
Same job with the same employer	22	12.9	39	25.0	68	19.1
More senior job, better qualified	26	15.3	19	12.2	48	13.5
Farm Owner	18	10.6	21	13.5	47	13.2
Same job, better qualified	16	9.4	16	10.3	39	11.0
More senior job	10	5.9	16	10.3	29	8.2
Same job with a different employer	12	7.1	8	5.1	23	6.5
Doing a completely different job in the industry	14	8.2	5	3.2	23	6.5
Other	13	7.7	7	4.5	21	6.2
In a permanent job	7	4.1	10	6.4	20	5.6
Leaving the industry	11	6.5	4	2.6	16	4.5
Becoming a contractor	10	5.9	1	0.6	12	3.4
Working in the mining industry	3	1.8	0	0.0	5	1.4
Retired	8	4.7	10	6.4	4	1.1
Total	170		156		355	

4.4.3 Reasons for leaving

It is also important to understand what can cause people to leave their position. Figure 17 examines the reasons respondents gave for leaving their previous employer (note that respondents could indicate more than one reason). The most common reason (21%) was better career opportunities elsewhere. Nine % found their previous job duties boring or unchallenging and 8% left due to poor leadership and communication from management/supervisors.

While better career opportunities elsewhere was also listed as the top reason for leaving in 2007, uncompetitive wages and not feeling valued/a lack of recognition of achievements were next two biggest reasons for leaving at that time. Uncompetitive wages seems to be less important to employees now than it was in 2007, perhaps due to the decline in employees per farm since 2007.



Figure 17. Reasons for leaving previous employer (% of total responses)

For those people who previously worked in mining (n = 25), the most dominant reasons for leaving mining were having an unsuitable lifestyle, as well as working too many hours or having boring or unchallenging work duties (Figure 18). Most respondents indicated that they were attracted to the livestock industry due to the lifestyle and type of work, consistent with these factors being previously identified as industry attractors not available in mining.

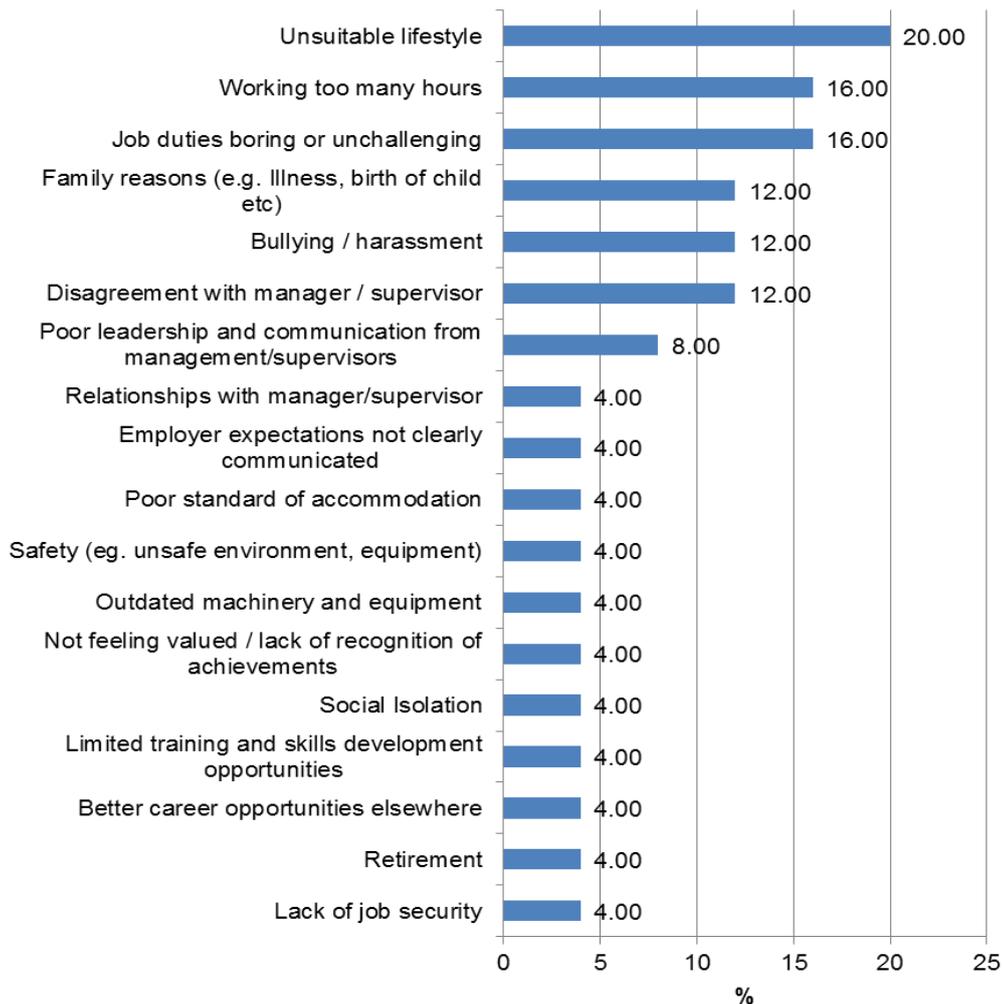


Figure 18. Reasons for leaving mining industry (% of total responses)

7.3.4 Retention strategies

Many employers take action to encourage their good employees to stay, some with more success than others. The most effective retention strategies/actions to convince employees to stay as reported by owner/managers are shown in Table 21. Note that they could select more than one strategy as being most effective.

Overall, the most commonly reported (26%) effective strategy was allowing flexible working hours. It was also the most commonly reported strategy for the southern industry but, for the northern beef sector, increasing salary was the most common response (20%). This is interesting given that earlier data suggested that pay was in fact not a major attraction for employees (5% of respondents indicated that it was a factor in attracting them). It may mean that while pay is not necessarily important for attraction it could be important for retention. Changing manager or supervisor was the least commonly reported strategy/action across all sectors.

Table 21. Most effective retention strategies/ actions to convince employees to stay (reported by owner/managers)

<i>Industry Sector</i>	<i>Northern Beef</i>		<i>Southern Beef, Lamb, & Sheep Meat</i>		<i>Red Meat Total</i>	
	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>	<i>N</i>	<i>%</i>
Allowing flexible working hours	24	17.4	65	28.8	92	26.2
Increasing salary	28	20.3	45	19.9	77	21.9
Providing training, qualifications	17	12.3	31	13.7	50	14.3
Providing time off in lieu of hours worked	21	15.2	26	11.5	47	13.4
Upgrading accommodation	10	7.3	16	7.1	26	7.4
Providing career paths	6	4.4	18	8.0	24	6.8
Other (please specify)	14	10.1	9	4.0	23	6.6
Increase social opportunities with members of the team	6	4.4	6	2.7	13	3.7
Providing air conditioning	4	2.9	3	1.3	7	2.0
Reducing work hours	2	1.5	4	1.8	6	1.7
Providing option for volunteering for community organizations (to meet new people)	4	2.9	2	0.9	6	1.7
Changing manager or supervisor	2	1.5	1	0.4	3	0.9
Total	138		226		351	

'Other' retention strategies mentioned were:

- A good workplace environment, respect, guidance, responsibility
- Allow to shoot roos/pigs on the property
- Clean working conditions, effective support staff
- Working with them and leading the way
- Providing productivity incentives
- Be fair dinkum about everything
- Our employees value lifestyle provided by the nature of our business. They work hard and we endeavour to reward them.
- Using horses
- Opportunity to involve their families in holiday periods.
- Time to attend functions that involve children's school events or in some cases pursue positions in community organisations and sporting clubs.
- Treat people fairly
- Management
- Recognizing commitment and effort
- Engaging them in the business
- Clarifying their roles and setting boundaries
- More money
- Giving more responsibility

4.5 Work conditions, job satisfaction and engagement with work

4.5.1 Pay, benefits and working conditions

Table 22 represents the total income reported for the different sub-sectors. Most respondents across all industry sectors reported that they earn less than \$30,000 per year. The majority of northern and southern respondents earned up to \$50,000 and \$60,000 per year, respectively. Around 8% of respondents in each sector reported earning a total income of more than \$150,000.

Notably, a one-way between groups ANOVA analysis revealed that the level of pay had no impact on intention to stay with the company, job satisfaction, morale or level of work engagement. This indicates that in contrast to employer perceptions, *amount* of pay is not an important factor in these areas.

Table 22. Total income, before tax, from current job (includes overtime, bonus, and superannuation)

<i>Industry Sector</i>	<i>Northern Beef</i>		<i>Southern Beef, Lamb, & Sheep Meat</i>		<i>Red Meat Total</i>	
	N	%	N	%	N	%
< \$30,000	41	26.8	25	15.2	68	20.5
\$30,000 - 39,999	28	18.3	23	13.9	56	16.9
\$40,000 - 49,999	18	11.8	23	13.9	42	12.7
\$50,000 - 59,999	20	13.1	19	11.5	40	12.1
\$60,000 - 69,999	12	7.8	15	9.1	28	8.4
\$70,000 - 79,999	8	5.2	11	6.7	20	6.0
\$80,000 - 89,999	6	3.9	12	7.3	18	5.4
\$90,000 - 99,999	3	2.0	6	3.6	9	2.7
\$100,000 - 109,999	1	0.7	8	4.9	10	3.0
\$110,000 - 119,999	1	0.7	4	2.4	5	1.5
\$120,000 - \$129,999	1	0.7	4	2.4	5	1.5
\$130,000 - \$139,000	2	1.3	0	0.0	2	0.6
\$140,000 - 149,000	1	0.7	2	1.2	3	0.9
> \$150,000	11	7.2	13	7.9	26	7.8
Total	153		165		332	

Table 23 below examines the employees paid an incentive, bonus or overtime in each industry sector. The vast majority of respondents across all sub-sectors indicated that they do not receive an incentive, bonus or overtime.

Table 23. Employees paid an incentive, bonus or overtime

<i>Industry Sector</i>	<i>Northern Beef</i>		<i>Southern Beef, Lamb, & Sheep Meat</i>		<i>Red Meat Total</i>	
	N	%	N	%	N	%
Yes	43	28.7	43	26.2	91	27.7
No	107	71.3	121	73.8	238	72.3
Total	150		164		329	

The most common service or benefit employees received as non-cash income was on-farm accommodation (Table 31)

Table 24. Services or additional benefits employees received as non-cash income

<i>Industry Sector</i>	<i>Northern Beef</i>		<i>Southern Beef, Lamb, & Sheep Meat</i>		<i>Red Meat Total</i>	
	N	%	N	%	N	%
House Accommodation quarters	66	39.8	87	48.9	163	41.2
Car	36	21.7	18	10.1	57	14.4
Bike	34	20.5	38	21.4	77	19.4
Petrol	11	6.6	16	9.0	29	7.3
Meals	42	25.3	47	26.4	92	23.2
Food (e.g. Meat)	59	35.5	32	18.0	96	24.2
Travel allowance	60	36.1	51	28.7	114	28.8
Paid skills training / qualifications	21	12.6	18	10.1	40	10.1
Remote schooling allowance	64	38.6	51	28.6	118	29.8
Flexible work hours	6	3.6	12	6.7	18	4.6
Time in lieu of hours worked	40	24.1	44	24.7	87	22.0
Air Conditioning	15	9.0	21	11.8	37	9.3
Power	92	55.4	51	28.7	151	38.1
Internet access	104	62.7	79	44.4	188	47.5
Total	92	55.4	60	33.7	161	40.7
	166		178		396	

An important factor in people's experience of work and working conditions is workload and hours. As highlighted in the background section of this report, work hours can have an impact on employee retention as it can impact wellbeing and lead to burnout if unsustainable. Standards set by the European Union suggest that working more than 48 hours per week poses a risk to individual health and well-being.

Figure 19 displays a comparison of the level of sustainability of work hours among all respondents in the sample for 2007 compared to 2013. In this report, sustainable work hours are said to be between <20 and 40, moderately sustainable between 41 – 50, and at risk more than 50 hours per week. These parameters were selected as they reflect the same parameters used in the 2007 report and allow for direct comparison. Based on these criteria, 64% of the red meat workforce is at risk and only 13% work in a highly sustainable way. Overall, this has not changed markedly since 2007.

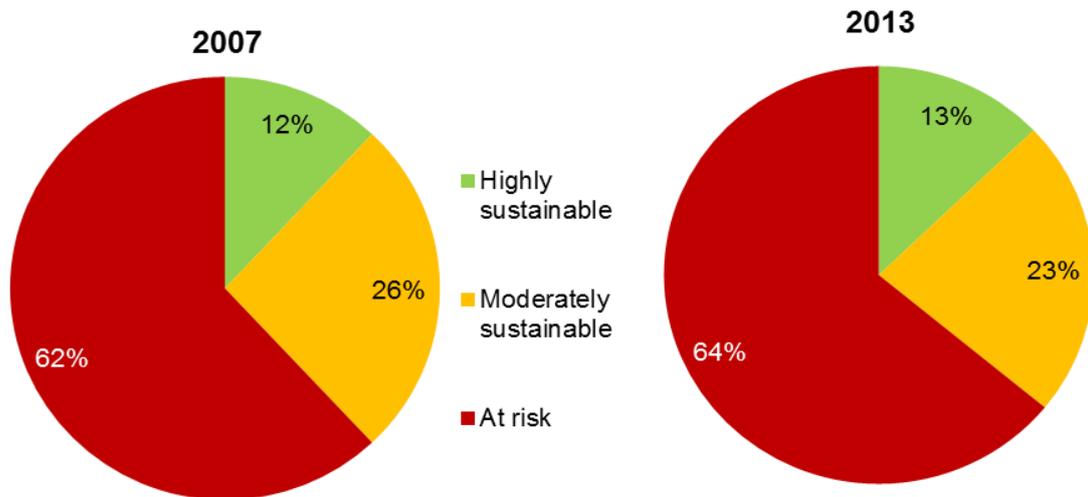


Figure 19. Level of sustainability of employees working hours across both sectors

The hours worked per week by respondents and their level of sustainability for each sub-sector are reported in Table 32. The majority of respondents across both sub-sectors reported working between 51 and 60 hours per week which is considered to be in the ‘at risk’ level of sustainability. Only 9% of respondents indicated that they received time off in lieu of hours worked (see Table 31).

Supporting this is the finding that many respondents (both owner/managers and employees) indicated that hours of work and feeling overworked was one of the things they liked least about their work. This suggests possible problems relating to burnout and fatigue, particularly for small farms, where employees work for more weeks of the year. Of particular concern is that 27% of respondents work more than 70 hours per week. However, it must be noted that information on the type and intensity of the work done during those hours was not collected, which may impact burnout and fatigue differently.

Table 25. Hours worked per week and level of sustainability

Industry Sector Hours worked per week	Northern Beef		Southern Beef, Lamb, & Sheep Meat		Red Meat Total		Level of sustainability
	N	%	N	%	N	%	
< 20	3	1.8	6	3.4	10	2.8	Highly sustainable
20 to 30	2	1.2	1	0.6	4	1.1	
31 to 40	14	8.6	17	9.6	32	8.9	
41 to 50	39	23.9	40	22.6	83	23.1	Moderately sustainable
51 to 60	52	31.9	70	39.6	126	35.1	At risk
61 to 70	4	2.5	4	2.3	8	2.2	
> 70	49	30.1	39	22.0	96	26.7	

4.5.2 Job satisfaction

Respondents were asked to rate their job satisfaction out of 6 using the following scale:

- 1 = Extremely dissatisfied
- 2 = Very dissatisfied
- 3 = Somewhat dissatisfied
- 4 = Fairly well satisfied
- 5 = Very satisfied
- 6 = Extremely satisfied

The job satisfaction levels of the employees surveyed are examined in Figure 20. Across all sectors, respondents recorded an average satisfaction level of 4.6 or higher, indicating that respondents are fairly well to very satisfied with their jobs.

Notably, the 2007 study found that large farm employees were significantly less satisfied with their jobs, while the 2013 survey results indicate that whilst there are no statistically significant differences across farm size. Large farm satisfaction has increased and is now actually slightly higher than small and medium farm employees in this sample.

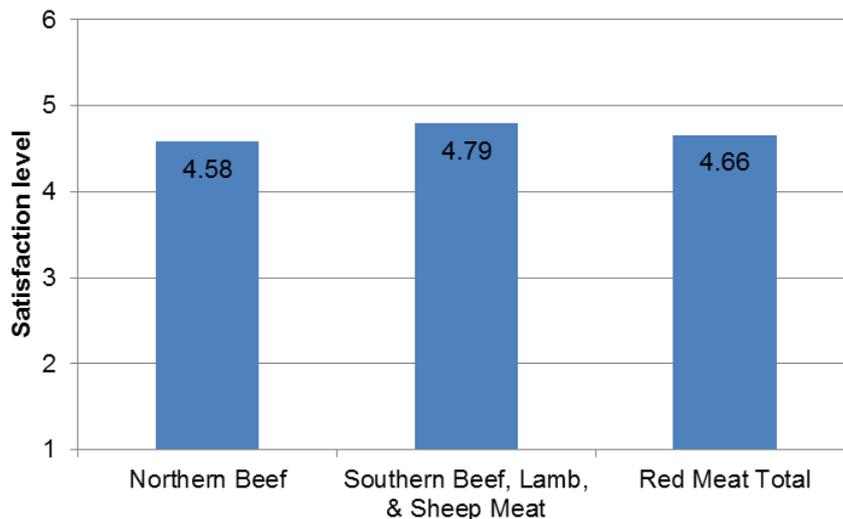


Figure 20. Job satisfaction levels – sector comparison and overall

Induction and the initial time settling into a new job can be an important factor in ensuring satisfaction with the overall experience of work. As such, respondents were asked to comment on the explanation of job expectations. Seventy two percent of respondents had the expectations of the job explained to them clearly when they started. This is lower than in the 2007 report, where 84% had job expectations clearly explained.

Figure 21 below shows the average level of satisfaction (using the same six point scale as above) with regards to satisfaction with the explanation of job expectations. This was fairly consistent across industry sub-sectors and has not changed markedly since 2007.

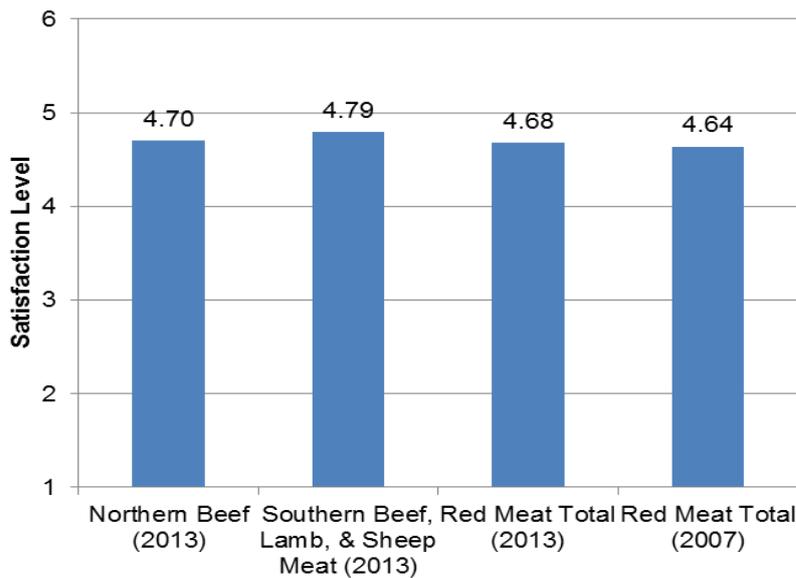


Figure 21. Mean satisfaction with explanation of job expectations

Whether respondents recommend their farm/station or company as a great place to work was also surveyed, as it is a strong indicator of their satisfaction. As Table 26 shows, the majority of respondents across all industry sectors recommend their place of employment as a great place to work ‘all the time’. This was consistent with 2007 results.

Table 26. Recommendation of farm/station or company as a great place to work

<i>Industry Sector</i>	<i>Northern Beef</i>		<i>Southern Beef, Lamb, & Sheep Meat</i>		<i>Red Meat Total</i>	
	N	%	N	%	N	%
Yes, all the time	71	51.8	76	62.8	166	57.2
Yes, sometimes	54	39.4	38	31.4	100	34.5
No, never	8	5.8	2	1.7	12	4.1
No opportunity to recommend	4	2.9	5	4.1	12	4.1
Total	137		121		290	

To gather more detail around job satisfaction, respondents were asked to respond to two open questions about what they like most and what they like least about their current job. These questions were added to the 2013 survey.

The key themes among responses are summarised below (not in order of frequency). These themes did not vary greatly across sub-sectors or across farm size.

What do you like most about your current job?

- Variety of tasks
- Lifestyle/life on a station
- Improving productivity and profit
- Producing a good product
- Family

- Responsibility
- Freedom/flexibility
- Outside work/environment
- Lots to learn
- Have a good boss
- Location
- Being autonomous/self-directed
- Being rewarded for effort
- Interesting work
- Working with cattle/horses
- Being part of a team
- Learning things
- Everything
- Improving infrastructure
- Being part of something special
- Security
- Teaching others
- Always learning
- Working with young people
- Colleagues
- Time to do leisure activities
- Stock camps
- Achievement
- Trying new things
- Being trusted
- Inexpensive cost of living

What do you like least about your current job?

For this section there were clear differences in the responses between owners/managers and general employees so they have been presented separately.

Owners/Managers

- Uncertain cattle prices/high dollar
- Paper work
- Mundane jobs
- Getting workers up to speed
- Dealing with people/staff challenges
- The weather/dry season/cold
- Public don't recognise the importance of the industry
- Hours of work/feeling overworked
- Financial pressure on the farm
- Drought/low rainfall
- Government red tape/regulations
- Poor markets
- Daylight saving time
- Dealing with animal rights activists
- Lack of commitment from young people

Employees

- Not enough training
- Some of the people I work with/people challenges
- Low pay/wages
- Rules
- Early starts
- Isolation
- Exhaustion
- Stress and pressure
- Hours of work/high workload
- Finding it hard to learn things
- Being treated differently as a female/lack of gender diversity
- Don't get to see family and friends as much
- Some of the mundane tasks e.g. cleaning
- Lack of communication
- Dirty work
- Weather/cold
- Not being satisfied with own performance
- Accommodation/beds
- Lack of teaching from manager
- Drought
- No time for personal wellbeing or improvement, e.g. study, exercise
- Industry in a poor state
- Faulty equipment
- Not seeing how the work I do is contributing to the longer term
- Lack of planning/organisation
- Lack of training
- Standards of animal care
- Poor team morale

Employees were asked to indicate whether they would feel comfortable discussing their concerns with their immediate manager. Responses indicate that most people would feel comfortable, however 16% would not raise problems with their managers.

Table 27. Respondents' comfort with raising concerns with manager

<i>Industry Sector</i>	<i>Northern Beef</i>		<i>Southern Beef, Lamb, & Sheep Meat</i>		<i>Red Meat Total</i>	
	N	%	N	%	N	%
Yes	109	84.5	88	83.0	220	83.3
No	20	15.5	18	17.0	44	16.7
Total	129		106		264	

4.5.3 Employee engagement

Schaufeli, Salanova, Gonzalez-Roma & Bakker (2002) define work engagement as 'a positive, fulfilling, work-related state of mind characterised by vigour, dedication and absorption.' The world's top performing organisations understand that employee engagement is a force that drives business outcomes. Research shows that engaged employees are more productive employees. They are more profitable, more customer-focused, safer and more likely to withstand temptations to leave the organisation (Gallup Consulting, 2010).

Respondents were asked a series of questions which relate to employee engagement indicators. These were as follows:

- **Retention** – "Do you see a long-term future at your farm/station/company?"
- **Pride** – "I am proud to be working for this farm/station/company"
- **Trusted and Valued** – "I am trusted and valued as a person"
- **Extra Effort** – "I am willing to put in extra effort to assist my co-workers or to achieve our business objectives"
- **Morale** – "How would you rate your own work morale at the present time?"
- **Satisfaction** – "Overall, how would you rate your satisfaction with your job?"
- **Loyalty** – "Do you recommend your farm/station/company as a great place to work?"

Figure 22 examines employee engagement indicators from both 2007 and 2013. The majority of respondents in both 2007 and 2013 reported that they were 'highly engaged' on all employment indicators. The biggest differences for 'highly engaged' relate to the indicators 'Trusted and Valued' and 'Pride'. In 2013, 88% of employees reported being highly engaged in terms of 'Trusted and Valued'. This is compared to 68% in 2007. In relation to 'Pride', 89% of employees were highly engaged in 2013 compared to 71% in 2007.

In terms of 'highly disengaged', the biggest increase from 2007 to 2013 related to 'Retention'. Specifically, 29% of employees were highly disengaged on the 'Retention' scale in 2013, compared to 17% in 2007.

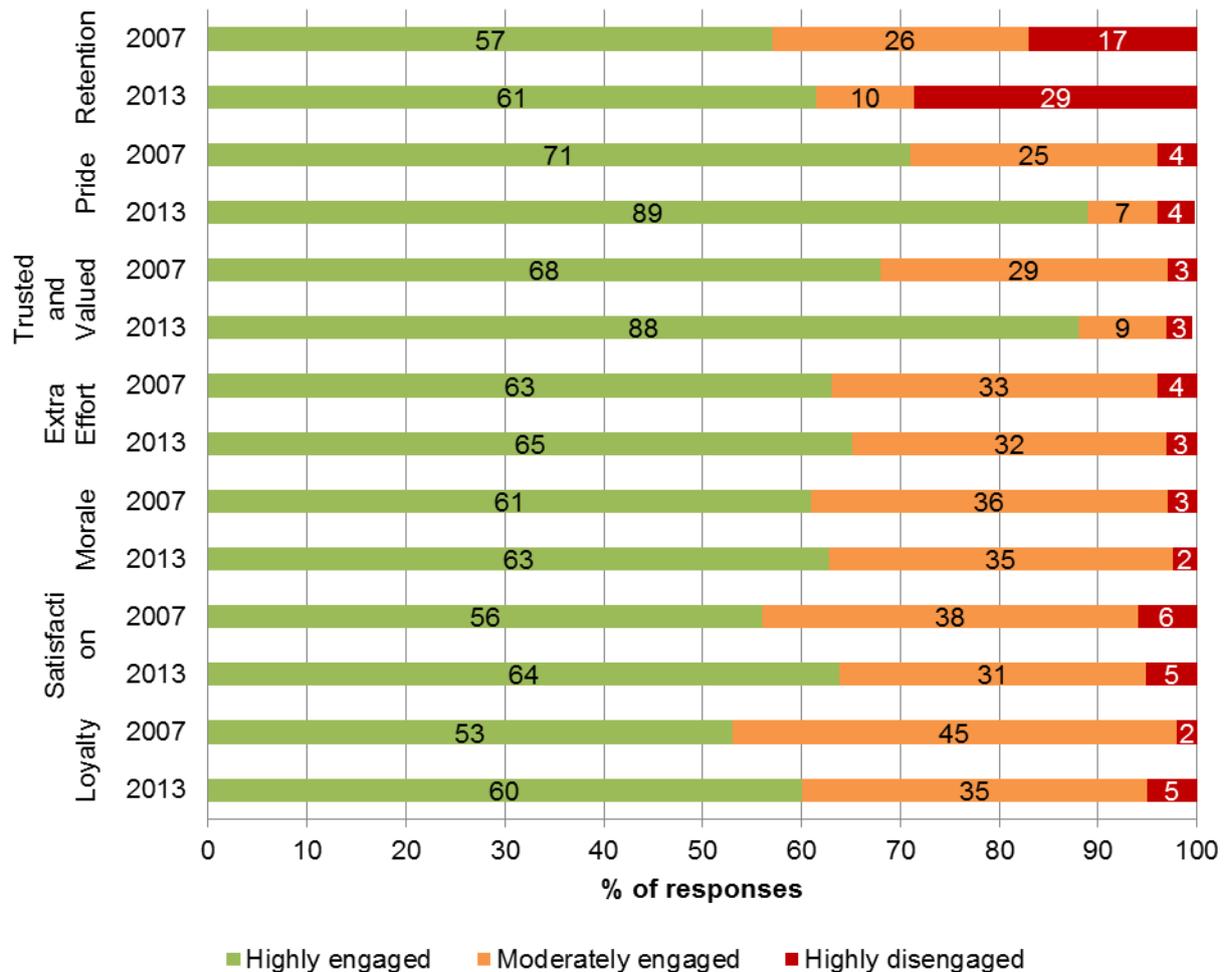


Figure 22. Employee engagement indicators – across sub-sector comparison over time

There were no significant differences due to farm size, except for retention, where small farm employees had significantly lower levels of certainty about their future with the business than large and medium farms.

Standard regression analysis revealed several factors that strongly and significantly predicted overall engagement (in order of predictive value) across sub-sectors. The top 10 are presented below. The larger the beta value, the greater the impact the variable had on overall engagement.

1. Being trusted and valued (beta = .493)
2. Managers concerned with developing individuals and building a supportive environment (beta = .331)
3. Overall job satisfaction (beta = .324)
4. Effective communication between managers and staff (beta = .320)
5. Attractive conditions of employment i.e. hours, leave, non-cash items (beta = .283)
6. Recognition for a job well done (beta = .245)
7. Having opportunities to get ahead in my career (beta = .226)
8. Being open and honest with each other (beta = .214)
9. Managers being concerned with business' future direction and growth (beta = .208)
10. Having a family community atmosphere (beta = .206)

Because this analysis technique identified causal relationships in the data, we can say that statistically speaking, if action is taken in the above areas there is more likely to be an improvement in overall engagement in the future.

Figures 23 and 24 below demonstrate employee engagement indicators separately for each sub-sector. The majority of respondents for both sub-sectors reported that they were 'highly engaged' on all employment indicators. The greatest level of employee engagement was found for 'morale', 'trusted and valued', and 'pride' and a relatively very small proportion of respondents were 'highly disengaged' for both sub-sectors. The greatest differences were for retention, satisfaction and loyalty, where southern sector had a higher proportion of 'highly engaged' respondents.



Figure 23. Employee engagement indicators – northern beef

Standard regression analysis was also performed for the norther beef sector. A total of 5 factors were shown to strongly and significantly predict overall engagement (in order of predictive value) are presented below. The larger the beta value, the greater the impact the variable had on overall engagement.

1. Being open and honest with each other (beta = .411)
2. Being trusted and valued (beta = .418)
3. Having opportunities to get ahead in my career (beta = .316)
4. Receiving fair pay for the work done (beta = .311)
5. Overall job satisfaction (beta = .278)

Based on this analysis, if action is taken in the above areas there is more likely to be an improvement in engagement for northern beef sector respondents in the future.



Figure 24. Employee engagement indicators – southern beef, lamb and sheep meat

A separate standard regression analysis was also performed for the southern sector. Several factors were shown to strongly and significantly predict overall engagement and the top 10 (in order of predictive value) are presented below. The larger the beta value, the greater the impact the variable had on overall engagement.

1. Managers concerned with setting performance targets and achieving results (beta = 2.060)
2. Managers concerned with developing individuals and building a supportive environment (beta = 1.505)
3. Good relationship with supervisor/manager (beta = 1.317)
4. Committed to environmentally sustainable use of resources (beta = 1.213)
5. Accommodation is of a good standard (beta = 1.000)
6. Recognised for a job well done (beta = .893)
7. Having opportunities to get ahead in my career (beta = .880)
8. Hours/leave days are flexible (beta = .858)
9. Being able to develop and improve skills and knowledge (beta = .857)
10. Enough opportunities to socialise with the team (beta = .852)

The factors identified as important for engagement for this sector were quite different to the overall analysis and the northern beef sector. Notably, fair pay did not have a significant impact on engagement at all. Again, we can say with confidence that statistically speaking, if action is taken in the above areas there is more likely to be an improvement in engagement for southern sector respondents in the future.

The Employment Engagement Index (EEI) and Employment Satisfaction Index (ESI) are measures of how well employers perform in engaging and satisfying their employees. Figure 25 below represents a comparison of the EEI and ESI for all respondents and is broken down by sub-sectors and farm size. Small farms had the highest levels of both engagement

with their work and job satisfaction, whilst large farms had the lowest. This is consistent with results found in 2007.

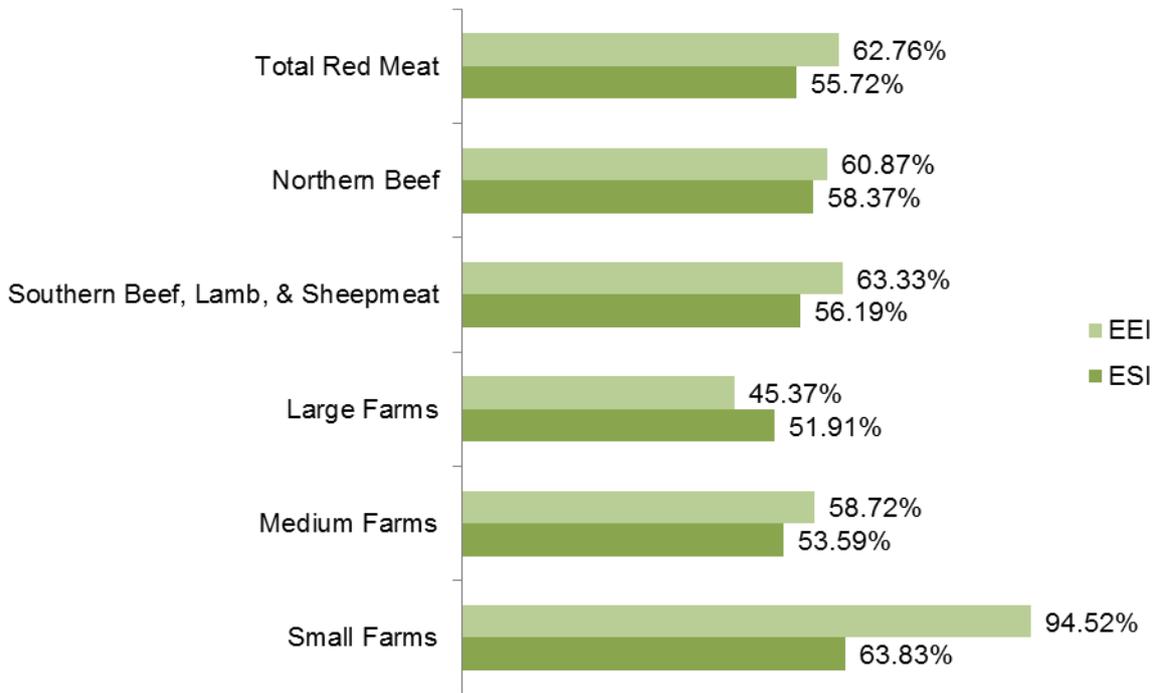


Figure 25. Employee Engagement Index (EEI) & Employee Satisfaction Index (ESI) comparison

Employees were highly satisfied due to their expectations being met to a high degree (performance gaps for top 10 expectations are smaller than -15 on all top 10 employee expectations) (see Figure 26 below). The top expectation for on-farm employees is having a good relationship with their manager/supervisor. Also important is having a good relationship with colleagues, understanding what is expected, and being trusted and valued. These factors highlight the importance of relationships and interpersonal and cultural factors, as well as the need to ensure employees understand what is expected of them in their work.

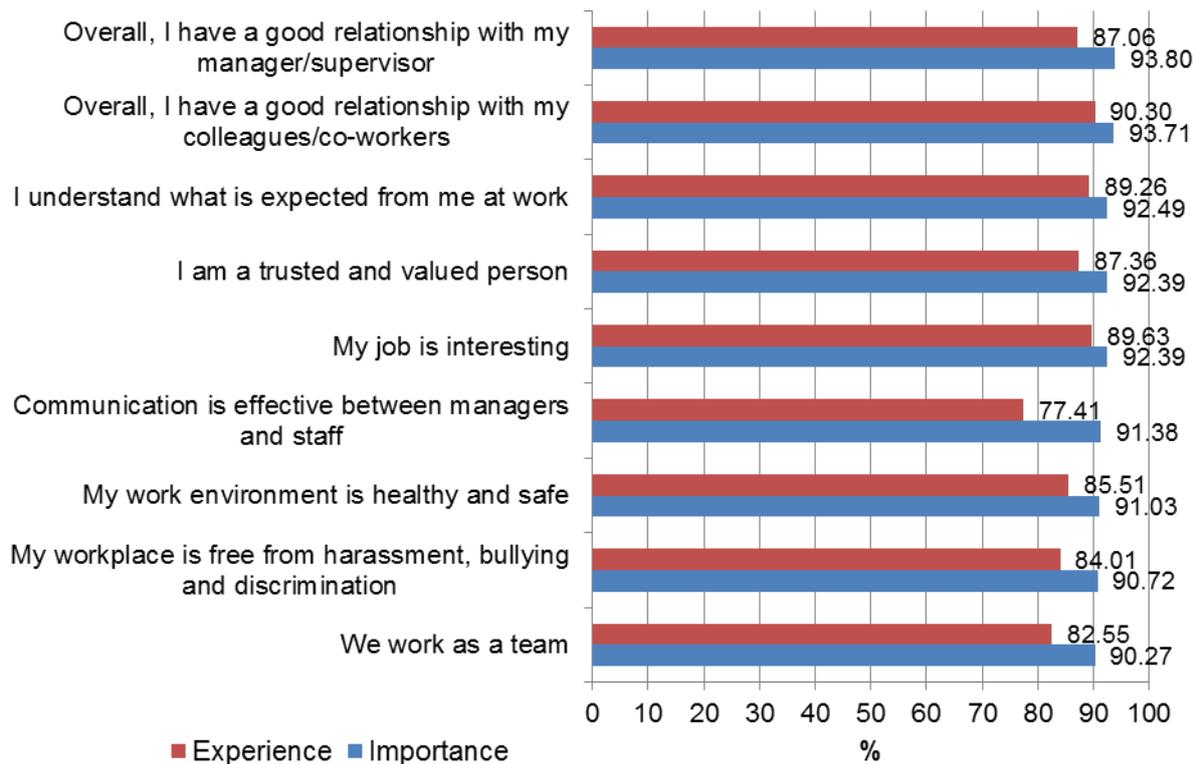


Figure 26. Expectations and performance – total sample

Top 5 important factors in experience of work for northern beef overall:

1. Good relationship with manager/supervisor
2. Being proud to be working for the station/company
3. Good relationships with colleagues
4. Family or community atmosphere at work
5. Working as a team

Table 28. Important work factors for northern beef broken down by farm size

<i>Large</i>	<i>Medium</i>	<i>Small</i>
Being proud to work for station/company	Working as a team	Trusted and valued as a person
Understand what is expected	Being open and honest with each other	Being proud to work for station/company
Trusted and valued as a person	Effective communication between managers and staff	Understand what is expected
Job is interesting	Having the equipment and resources to do the job	Good relationship with manager/supervisor
Good relationship with co-workers	Workplace free from harassment, bullying and discrimination	Family/community atmosphere

Top 5 important factors in experience of work for southern employees;

1. Good relationship with manager/supervisor
2. Understand what is expected of me at work
3. Being proud to be working for the station/company
4. Being trusted and valued as a person
5. Good relationships with colleagues

Table 29. Important work factors for southern sector broken down by farm size

<i>Large</i>	<i>Medium</i>	<i>Small</i>
Strong leadership and clear direction	Being proud to work for station/company	Good relationship with manager/supervisor
Good relationship with colleagues/ co-workers	Trusted and valued as a person	Job is interesting
Good relationship with manager/supervisor	Good relationship with colleagues/ co-workers	Being open and honest with each other
Committed to environmentally sustainable use of resources	Good relationship with manager/supervisor	Understand what is expected
I understand what is expected of me at work	Working as a team	Workplace free from harassment, bullying and discrimination

4.6 Case Studies

This section presents case studies for six enterprises that are based on information collected in the surveys and in some cases through discussions with owner/managers and employees. These case studies have fewer problems with attraction and retention than others and were selected to showcase some examples of industry best practice in regards to staff attraction and retention and the key strengths of the business in this area. Ongoing challenges have also been presented to provide a realistic view of each selected case, as there were no cases where a business had no problems at all with regards to staff attraction and retention. Companies used for case studies have been kept anonymous.

Case Study A

Context/description:

- Small enterprise
- Northern beef sector
- One property

Strengths:

Spending time on on-the-job training

The owners of this business have found that spending time with employees one-on-one (especially during the initial stages) has allowed the employee to get up to speed with requirements quicker, and also to develop a sense of belonging and loyalty. Employees also believe that this practice contributed to their feeling that they were an important part of the business and valued by the owners. The owners found that, for each employee, the time required will be different but they remain willing to spend the necessary time with them.

Provision of performance based incentives

The owners provide bonuses and non-monetary rewards such as time off when the employees' performances have been of a high standard, e.g. based on speed, success in achieving set task, no cattle losses, etc. Employees say this motivates them to work hard.

Flexible working conditions

As a key retention tool, the owners allow employees to have time off in lieu of hours worked. This is important for employee wellbeing and is seen as a reward for putting in extra effort during busy times, working on weekends etc. The employers also allow employees to choose their own times of work, as long as the work set for them is completed.

Challenges:

Finding which recruitment methods work best

This enterprise has had mixed success with short term staff strategies, such as employing people on 457 visas and short term itinerant workers such as backpackers. They found that the commitment and dedication had an impact on the quality of work. This experience has prompted them to be more careful and targeted with recruitment practices.

Case Study B

Context/description:

- Medium enterprise
- Northern beef sector
- Two properties

Strengths:

Induction/on-boarding

On-boarding is a term used to describe the process of integrating a new employee into the new workplace and helping them to adapt and 'learn the ropes'. The owners/managers of this business believe that working closely with employees when they first start, to ascertain their skills and development needs, is critical as this allows them to determine what they need to fast track their performance. Based on survey data we know that employees value training and development, so it is suggested that this practice may also have a positive impact on retention. For this enterprise, the low turnover rate for full time staff at both properties supports this assertion.

Selection process

When potential candidates for work are interviewed, they are asked to participate in some basic activities such as riding a horse, or fixing a fence. This allows the owners to gather behavioural evidence that the person is able to do a good job before deciding to take them on. This method was developed following the discovery that candidates cannot always do what they say they can do. This practice is also aligned with Locher's knowledge of best practice in methods that best predict future job performance.

Management of workload

The owners have made an effort to employ more staff to cover the range of duties required in order to control workload for both themselves and the staff. This is also the plan for the future.

Safety

A strong focus on workplace health and safety, as well as worker wellbeing, is part of the operational strategy with this business. The owners believe it is vital to their success with supporting and keeping workers, and are intending to increase focus on this in the future.

Challenges:

Recruiting particular positions

This enterprise is still having some difficulty recruiting strong candidates for station hand roles, as well as gaining suitable part-time employees. However, they have found that by booking the employees in for work 5-6 months in advance, they have better success.

Case Study C

Context/description:

- Small enterprise
- Southern beef, lamb and sheep meat sector
- One property

Strengths:

Sourcing young Australians with farm backgrounds

The owner of the farm has noticed a decrease in the number of overseas/international people looking for short term work (backpackers). To address this, they have looked for ways to source young Australian back packers who want a different country/rural experience (in addition to any overseas/international workers who are available). As there is little time to get these workers up to speed (due to the short term nature of the work) the criteria they look for is a background of working on farms. This has meant that workers are quicker to pick up requirements and also have a perceived stronger work ethic.

Training and on-boarding

The induction for new employees is quite thorough and employees are given as much detail as possible verbally and in written form (e.g. farm maps). New employees are trained primarily on-the-job, and the manager looks to identify particular gaps in ability within the first two weeks and concentrates on those key areas if needed.

Use of technology

This farm has introduced the use of iPhones and iPads to assist in farm operations and communication. It is believed that this is also a benefit appreciated by workers.

Challenges:

Recruiting particular positions

This enterprise is still having some difficulty recruiting strong candidates for fencing and stock handling roles, particularly in peak season.

Case Study D

Context/description:

- Small enterprise
- Northern beef sector
- Three small properties

Strengths:

Provision of high quality living environment

The accommodation provided to staff is of a high standard, and is highly family oriented. The employees also have a range of additional benefits such as free power, phones and meat as additional non-cash allowances. Employees are encouraged to get involved in community events and are given time off when there are family commitments.

Encouragement of team work

Team work is seen as an important focus, and the owners actively try to create a feeling of team atmosphere, getting staff from the three properties together regularly, encouraging attendance at community events and having meals together.

Invite input from employees

The managers of the properties get other staff involved in major decisions in order to make them feel valued and integrated into the business. The owners also make an effort to ask workers about their opinions on major decisions affecting them, e.g. pasture improvement methods, expansion plans, etc. The owners believe that this has contributed to some very satisfied long-term employees and a deep sense of loyalty among workers and their families.

Staff training and development

There is a strong focus on skill development, with both on the job and formal training (e.g. first aid certificate, chemical handling certificate) provided. When employees first join, they spend a long time ensuring they are familiar with the operations and maintenance of the property and equipment, and gain an understanding of the business, its culture, values and future direction.

Challenges:

Perception of low wages

Although there has never been a problem attracting staff, the owners still battle with a perception of low wages (despite a range of non-cash benefits) when employing new staff.

Case Study E

Context/description:

- Large enterprise
- Northern beef sector
- Twenty properties

Strengths:

Fly-in fly-out approach to employment

In order to attract short term employees, the business has adopted a fly-in fly-out style of workforce on the stations. This includes using backpackers during peak periods for basic work, and people who fly in only for muster, or only for peak periods from other locations (including some from more metropolitan locations). It is believed that this opens up the pool of potential people as they only need to be willing to work remotely for short periods rather than ongoing.

Use of technology

Using technology has not only been a factor contributing to interest from potential workers, but has also helped to decrease the number of staff required. An example of the technology in question is using helicopters for mustering.

Training

Over time the business has learned that training qualifications or certificates in agriculture etc, do not necessarily mean that the person will be a good employee. As a result, there is a strong focus on provision of training, and thorough workplace induction (which has been formalised to include relevant safety training in recent years). New employees are paired with an experienced person when they begin and, if a need is identified, can attend training

school/classes in the appropriate areas (more for permanent staff but some contractors will attend depending on the qualification or learning topic).

Challenges:

Finding committed long term employees

Because the company uses and promotes the benefits of a fly-in-fly out approach to employment with potential staff, they have found that attracting people who want a longer term career has been difficult. Whilst they do not have trouble attracting people, there is a need for more regular recruitment (and the associated costs) using this method.

Case Study F

Context/description:

- Medium enterprise
- Southern beef, lamb and sheep meat sector
- Two properties

Strengths:

Utilising traineeships

Traineeships have been used successfully in this company to up-skill young workers who are looking for a career in livestock. The traineeship was seen as a way to 'try out' the person over a period of about 18 months, and give them the benefit of learning farm skills as well. This methodology is used successfully in a range of industries within Australia and traineeships or apprenticeships can be arranged through a variety of sources, for example Elders or rural recruitment agencies.

Family atmosphere

The owners believe that a family atmosphere is important, and aim to treat employees like family. For example, having dinner together, spending time together casually, organising social events within the community, and fostering a team spirit.

Challenges:

Drought conditions

The drought conditions have made it very challenging for workers on the property, and there are concerns about keeping the pasture healthy and the cattle in good shape. It is perceived that this is becoming harder and harder and may affect retention of workers.

5 Discussion/conclusion

5.1 Overall summary

Review of the literature suggests that the attraction and retention of staff is a multidimensional issue. Empirical studies no longer merely rely upon wages, or even upon wages plus additional benefits and incentives such as the provision of housing, when seeking to analyse attraction and retention outcomes. The tangible incentives are generally analysed in conjunction with many possible influences. Factors may include culture and organisational characteristics, job characteristics such as pay and hours, organisational support, lack of awareness of career opportunities and many others.

This study has examined the extent of the challenges to attraction and retention and their impacts on businesses, the processes of attracting and retaining workers from an owner/managers perspectives, as well as looking at the decision making processes involved in whether or not an individual joins and stays with an employer. The study has revealed many useful opportunities to increase success with recruitment and retention of staff in the red meat livestock industry in Australia. However, it is clear that there is no one 'silver bullet' solution, and success will most likely be a result of a range of different strategies being implemented by both industry as a whole and by individual on-farm employers.

This study also had the opportunity to compare changes over time with regards to attracting and retaining staff. Whilst some of the problems faced by employers in these areas have not altered significantly since the last study was conducted in 2007, there has been some further clarity gained on what both industry and individual employers can do to more effectively attract and retain workers in the future.

5.1.1 Demand for labour

Consistent with general labour trends in Australia, the average number of full time vacancies per farm/property has significantly decreased since the first survey was completed in 2007. Many participating farms reported labour shortages, particularly during peak periods. In peak time, large farms have a much larger shortfall than small and medium farms. In addition, northern beef properties require significantly more staff in peak time, and experienced larger labour shortfalls than southern producers. This indicates that employers have an ongoing requirement for new workers and that there are still significant shortages being experienced during important times of the year.

Climate variability, especially drought, remains a key factor influencing labour demand for some farms, however the 2013 survey found it to be less important in driving employment relative to 2007.

5.1.2 Attraction of staff

The problem of recruiting staff to the industry occurs to some extent across Australia, but is more acute for the northern producers in both peak and non-peak periods of the year. Over 90% of northern beef respondents reported some degree of difficulty with recruitment during peak time, compared to 64% for southern producers. The most commonly reported reasons for difficulty with recruitment have not changed significantly since the 2007 study – these include the shortage of skilled people, low wages, losing workers to mining and lack of existing people who are educated in relevant technical skills.

Notably, employers' perception that the mining industry is a major factor is at variance with evidence that shows that the attractors to the pastoral livestock industry are strongly inherent to the nature of livestock operation and associated lifestyles (family background working on a farm, lifestyle, working with animals, and working outdoors). These factors are things that are not features of mining jobs, making it less likely that employees would in fact be attracted to the mining industry with its sharply contrasting work environment and lifestyle.

The most common recruitment method used, regardless of farm size or sub-sector, was asking local people directly (41% of respondents). Its usefulness was supported by the finding that many employees reported being approached directly by an employer as a common way of gaining work. This suggests that this method could be something that more employers could consider using, and that connecting employers with the local community more often may be something that could result in more opportunities for farms to find employees and vice versa. Employers who advertised in a non-local newspapers had significantly more difficulty with recruitment than other employers in peak time, and

employers who recruited through a rural recruitment agency had significantly more difficulty during non-peak time. This raises a question about the relative cost-benefit of these strategies.

5.1.3 Retention of employees

Since 2007, the reported turnover of full-time employees on large and small farms has not changed markedly, while for medium farms it has decreased slightly. For part-time employees, turnover has increased for all farm sizes. This suggests that the extent of problems with turnover may be relatively stable overall, but on the rise for part-time workers. The turnover rates identified, however, do represent fairly high rates compared with other industries and therefore highlight that it continues to be a key challenge.

A major positive finding from the study was that the majority of respondents (61.48%) indicated that they saw a long term future at their current place of employment. This is a slightly higher proportion than in 2007 which is encouraging. Statistical analysis revealed that people who saw themselves having a long term future with the business were significantly more likely to have higher morale, higher levels of engagement (they enjoy and are interested in their work), a higher level of job satisfaction, experienced strong leadership and clear direction, and experienced working as a team. This means that if employers focus on developing and implementing strategies that aim to improve their employees experiences in these five areas, this will encourage existing workers to embrace a longer term future with the business.

The most common reason (21% of responses) reported by employees for leaving their previous farm of employment was that they believed there were better career opportunities elsewhere. This indicates that employers could encourage retention by ensuring that career progression opportunities are clarified, and that employees do have a clear idea of opportunities available within the business.

The most commonly reported effective retention strategy (26% of employers reported this) was allowing flexible working hours. This could be a strategy that could be used more often to accommodate employees who do have variable hours due to farm demands. It could perhaps be leveraged as an attractor in the process of advertising and recruiting as well.

Despite many of the owner/manager group listing the losing of skilled workers to mining as a perceived reason for recruitment difficulties, only about 3% of employees reported an intent to work in the mining industry in the next 5 years. These findings are consistent with the results found in 2007 and indicate that competition from the mining industry is not as strong as is perceived. For those who previously worked in mining (n = 25), the dominant reasons for leaving were having an unsuitable lifestyle, working too many hours or having boring or unchallenging work duties. Given that most people are attracted to the livestock industry due to the lifestyle and type of work, these are potential factors that are unique and may be successfully leveraged in attracting people to farms from the pool of potential workers.

5.1.4 Working conditions

The proportion of people working unsustainable hours (>50 hours per week) has increased since 2007, with 64% of the workforce considered at risk. Only 13% work less than 40 hours per week which is considered sustainable in the long-term. Further, 27% of respondents report working more than 70 hours per week. This suggests potential issues relating to burnout and fatigue.

The results indicate that employer respondent's view that increasing salaries is seen as an effective retention strategy. Employee responses, however, suggest that the impact of pay

and conditions is mixed. The level of pay and benefits had no impact on retention indicators such as intention to stay with the company, nor did it affect job satisfaction, morale or level of work engagement. This indicates that in contrast to employer perceptions, amount of pay is not usually a major factor unless there are also other concerns. As found in 2007, the factors that appear to be more significant at the industry wide level relate to staff engagement and other variables.

5.1.5 Engagement and job satisfaction

Results of the study suggest there is a strong sense of satisfaction among on-farm employees, and the majority of respondents across all industry sectors recommend their place of employment as a great place to work 'all the time'. Most people were also highly engaged and had high levels of job satisfaction. This was generally consistent with results from the 2007 study and indicates that in general the on-farm red meat industry provides employees with meaningful and enjoyable work and careers.

Given that an employee is more likely to leave an employer, than the industry as a whole, employers have an important role to play in retaining staff. The most important factor influencing employee commitment to their current employer is having a good relationship with their manager/supervisor. Also important is having a good relationship with colleagues, understanding what is expected in the job, and being trusted and valued. These factors highlight the importance of relationships and interpersonal and cultural factors, as well as the need to ensure employees understand what is expected of them in their work. The above factors are influenced heavily by the choices and practices of employers themselves, reinforcing the need for a change in practices at the farm level.

Engagement and job satisfaction are commonly reported in workforce studies as major factors in employees' intentions to stay. The results of this study are consistent with this, with higher levels of engagement, job satisfaction and morale all being significantly linked to retention.

5.2 Best practice recommendations to increase attraction and retention

The results of this study support many of the major findings of the survey conducted six years ago, and identify that employees continue to be highly engaged in their work and now an even higher proportion than in 2007 intend to stay long term. However, there are still difficulties with labour shortages and turnover.

The results provide many clues as to how enterprises of all sizes and sectors can improve their practices in the areas of attraction, recruitment and retention, as well as highlight some industry wide strategies that are likely to be of value. Importantly, this study has revealed that differences in pay and other benefits do not appear to be related to differences in attraction and retention indicators at the industry wide level. The factors that appear to be more significant relate to staff engagement, job satisfaction, morale and other variables.

Key recommendations are summarised below.

5.2.1 Recommendations at the industry level

1. To address the lack of skilled workers available for employers, it is recommended that there is an integrated industry approach to encouraging students to enter into agriculture courses at university as well as VET courses and traineeships. Part of this approach could be including more opportunities to expose high school students to agriculture (steps have been made in this area already, e.g. MLA's virtual farm visit),

communicating the large number of job opportunities available upon graduating, and educating young people about the industry and what it can offer them in terms of career pathways. Other useful ways of addressing skills shortages in other industries include strong representation of industry bodies at trade shows and other relevant events, and promoting the use on online skills registers such as the National Skills Register for Australian Ag as well as other non-traditional ways to connect potential workers with employers.

2. Continue to work on developing a campaign to improve the image of the grazing livestock industry as a career choice, especially for young people. Key attributes of on-farm red meat industry employment that can be leveraged include the lifestyle benefits, working outdoors and with animals, job variety, community orientation, high levels of job satisfaction and a highly engaged workforce. It may also be useful to seek ways to provide more education to people who do not have a family background of working on a farm about the industry, the work, and the opportunities available.
3. Utilise existing databases/industry platforms to connect employers to job seekers or agriculture students. For example, employers could post job vacancies on an industry web site, industry could develop its own national skills register for employer members to access, or partner with an existing register such as the National Skills Register for Australian Ag.
4. Facilitate more opportunities for community networking and connectivity with a careers focus in mind, with the intent to connect employers with people in the local community who may have an interest in farm and livestock work. In addition, consider creating opportunities for employers to connect with other employers with positive 'success stories' to learn about attraction and retention strategies and pool resources where possible.
5. To support retention of staff, provide opportunities for owners/managers to support the development of non-operational management skills. This may be especially beneficial for people on small to medium sized farms who may not have had exposure to professional development in this area. Examples include training and development for managers in how to have career focussed conversations with staff, succession planning, people management skills, workforce engagement, building a high performing team, how to provide effective feedback, and having performance conversations.
6. Set up mentoring or 'buddy' programs for new recruits across multiple businesses as a method of connecting workers with other, perhaps more experienced workers in the industry (not necessarily working at the same employer). This is a way of keeping workers connected with others in the industry as well as learning from each other.

5.2.2 Recommendations at the farm level

1. Continue to utilise a targeted approach to recruitment, i.e. approaching potential people directly, but increasing scope to advertise more broadly to high schools, VET colleges and universities, through agriculture groups and societies, and advertising online and through social media.
2. Ensure that when advertising for a position, as well as the details of the position the key attractions and 'features' of the job and lifestyle are also included to 'sell' the job. For example, a description of the lifestyle, location, animals, and positive features of the culture and atmosphere.

3. Though amount of pay does not seem to be a major factor, a fair level of pay may still be an important influencer of satisfaction in a job. Employers can address this by ensuring that they:
 - a. Regularly review remuneration packages and compare them with industry standards/awards to ensure they remain as competitive as possible.
 - b. Communicate with employees more effectively about the remuneration packages (cash and non-cash) and how they compare across the industry, opportunities for career, work-life balance, flexible hours and the team / family / community atmosphere at work. This should be made clear before employees begin.
4. Develop the working environment by focussing on the key drivers of staff engagement. This includes several strategies:
 - a. Employees are most engaged when they are trusted and valued, therefore reward and recognition strategies (both formal and informal) are essential. In addition, providing regular concrete and specific feedback (both positive and constructive) to employees, opportunities to provide input into decisions, being given autonomy to work on projects that add value to the enterprise and its operations could also be useful ways of building a sense of being trusted and valued.
 - b. Developing skills and capabilities and a supporting working environment are also important for engagement. This can be done by giving employees 'stretch' tasks, and upskilling them via training or attending industry workshops.
 - c. Employers can also influence engagement by ensuring a good flow of communication between managers and staff. Regular opportunities for one-on-ones and group meetings can be useful in this regard, as well as ensuring leaders are approachable and welcoming of communication and ideas.
5. Review current workload of employees, remembering that each individual will have different 'limits' so it is important to explore the issue on a person by person basis. If workload is in the unsustainable category, identify the reasons why, and consider practical and realistic ways to manage or reduce the problem, for example by reviewing the efficiency of work practices, providing additional resources where possible, giving time off in lieu to make up for busy periods, and/or providing recognition for effort by providing cash bonuses or other rewards/benefits.
6. Monitor job satisfaction and engagement. Gathering regular feedback from staff on how they are feeling and their intentions, as well as views on major farm and industry events will allow farms to recognise potential problems before they develop into big ones, or before they cause someone to leave. Involving employees in addressing issues raised will also assist.
7. Ensure that career progression opportunities are clarified with employees, and that employees do have a clear idea of opportunities available within the business. For small employers where there may not be a clear career progression pathway in the traditional sense, consider alternative ways to increase an employee's responsibilities, authority and impact. For example, involving them in business decisions and budgeting or putting them in charge of important projects on the farm.

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7 Appendix A – Additional demographic data

In the current study, large enterprises had a much younger age profile than other size businesses with 64% of employees under 30 years, compared to 46% for medium enterprises and 13% for small. This follows the same trend found in 2007. The proportion of employees over 60 increased over time for small properties, with 21% of respondents over 60 years in 2007, and 27% over 60 in the 2013 study.

Another interesting point to note is that in each sector there appears to be a lack of numbers in the 30-39 age group, despite having large numbers in the younger age bracket (started work 0-11 years ago) and a significant number in the 40-59 age group (started work 33-42 years ago). This indicates that very few appear to be making the transition through the 30-39 age group (started work 12-21 years ago), which is an age when they would likely be consolidating their career in the industry. This is highlighted in Tables 37-39 below.

Table 37. Age profile by property size – overall sample time comparison

	<i>Employees under 30</i>		<i>Employees between 30-39</i>		<i>Employees between 40 - 59</i>		<i>Employees 60 and over</i>	
	2007	2013	2007	2013	2007	2013	2007	2013
	%		%		%		%	
Large	57.0	64.0	15.0	8.0	21.0	24.0	7.0	4.00
Medium	40.0	46.3	12.0	9.8	39.0	32.5	9.0	11.4
Small	15.0	12.5	14.0	13.8	50.0	46.9	21.0	26.9

Table 38 represents the percentage of respondents according to age profile and by property size in the northern beef sector for 2013. For small farms the greatest proportion of respondents were in the 40-59 age range (56%). In contrast, the greatest proportion of respondents for medium (54%) and large (71%) farms were under 30 years of age.

Table 38. Age profile by property size – northern beef 2013

	<i>Employees under 30</i>	<i>Employees between 30-39</i>	<i>Employees between 40 - 59</i>	<i>Employees 60 and over</i>
	%	%	%	%
Large	71.2	7.7	19.2	1.9
Medium	54.0	15.9	23.8	6.4
Small	16.0	6.0	56.0	22.0

Table 39 represents the percentage of respondents according to age profile and by property size in the southern beef, lamb and sheep meat sector for 2013. The greatest proportion of respondents were in the 40-59 age range for both small (42%) and medium (44%) farms. However, for large farms the greatest proportion of respondents were younger; under 30 years of age.

Table 39. Age profile by property size – southern beef, lamb and sheep meat 2013

	Employees under 30	Employees between 30-39	Employees between 40 - 59	Employees 60 and over
	%	%	%	%
Large	42.1	10.5	36.8	10.5
Medium	34.6	1.9	44.2	19.2
Small	10.7	17.5	41.8	30.1

Table 40 below shows the number and percentage of respondents by gender and according to age category. A comparison of these results has been made to the results of the 2007 study.

For males in the 2013 study, the workforce appears to be dominated by very young and older workers with a lack of men in their early to mid career (See Table 6 and Figure 27 below). A similar trend was seen in 2007.

For females in the 2013 study, the 48% of respondents were 29 years of age or less, with the most common age bracket being 20-24 (21%) (Figure 28). These results closely mirrored the 2007 study, and could indicate difficulty getting women to stay in the industry throughout their careers.

Table 40. Age profile by gender - time comparison

	Male 2007		2013		Female 2007		2013		Total 2007		2013	
	N	%	N	%	N	%	N	%	N	%	N	%
Less than 20	66	12.2	23	9.5	39	15.1	12	10.6	105	13.2	35	9.8
20-24	80	14.8	32	13.2	64	24.8	24	21.2	144	18.1	56	15.6
25-29	51	9.5	16	6.6	38	14.7	18	15.9	89	11.2	34	9.5
30-34	38	7.1	12	4.9	18	7.0	5	4.4	56	7.0	17	4.8
35-39	42	7.8	14	5.8	21	8.1	9	8.0	63	7.9	23	6.4
40-44	55	10.2	20	8.2	12	4.7	11	9.7	67	8.4	32	8.9
45-49	46	8.5	23	9.5	22	8.5	10	8.9	68	8.5	34	9.5
50-54	54	10	26	10.7	17	6.6	8	7.1	71	8.9	34	9.5
55-59	34	6.3	25	10.3	12	4.7	8	7.1	46	5.8	33	9.2
60-64	46	8.5	18	7.4	12	4.7	4	3.5	58	7.3	22	6.2
65 or over	27	5	34	14	3	1.2	4	3.5	30	3.8	38	10.6
Total	539		243		258		113		797		358	

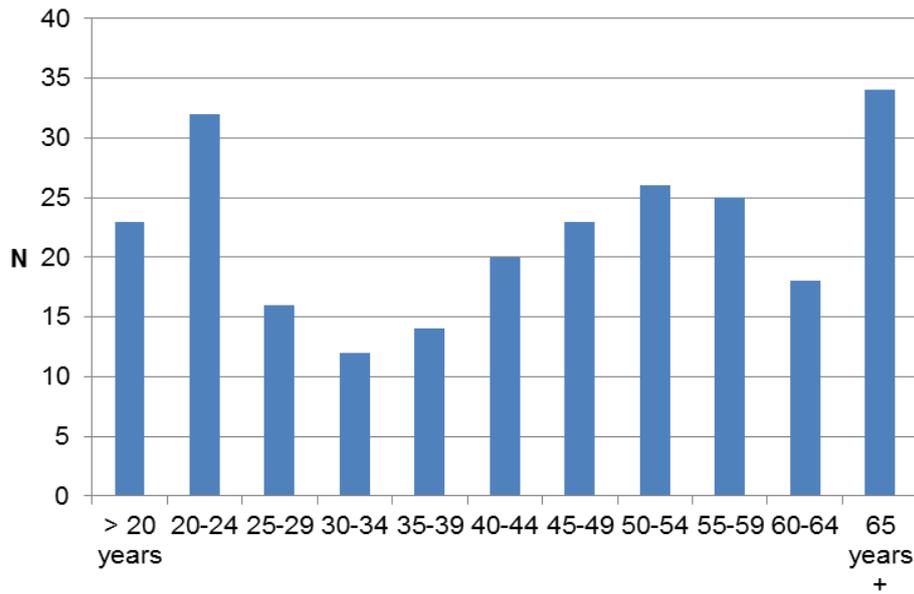


Figure 27. Male respondents age profile

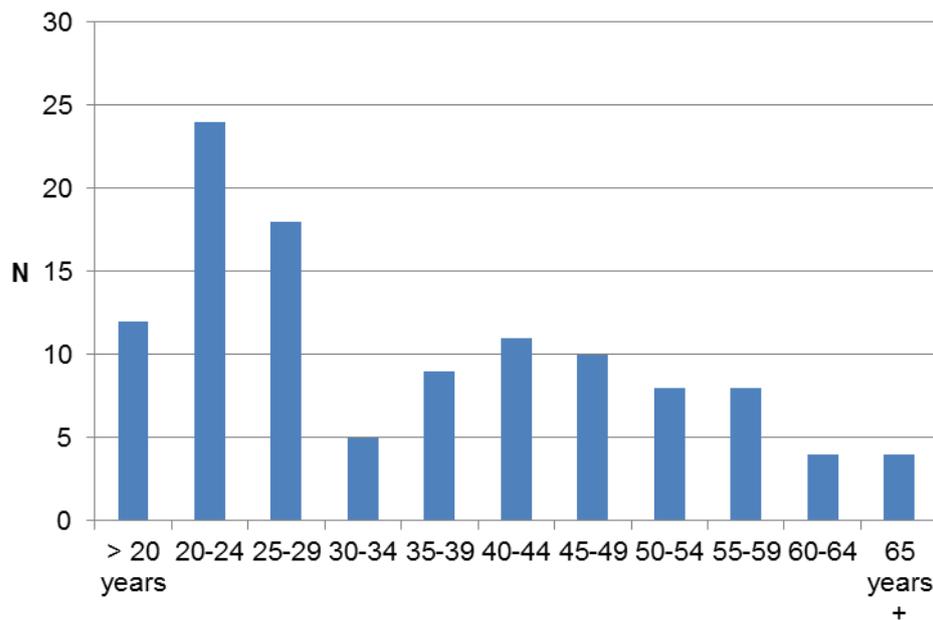


Figure 28. Female respondents age profile

Table 41 demonstrates the age category of respondents by gender within the northern beef sector for 2013. For both males and females, the majority of respondents were under 25 years of age (34 % for males and 38% for females). As seen in Figure 29, overall the proportion of respondents for both males and females decreased as age increased, with a lower proportion of people in the 30-40 year age bracket but increasing somewhat after that.

Table 41. Age profile by gender - northern beef 2013

	<i>Male</i>		<i>Female</i>		<i>Total</i>	
	N	%	N	%	N	%
Less than 20	14	14.9	8	11.3	22	13.3
20-24	18	19.2	19	26.8	37	22.4
25-29	8	8.5	12	16.9	20	12.1
30-34	6	6.4	3	4.2	9	5.5
35-39	2	2.1	6	8.5	8	4.9
40-44	9	9.6	4	5.6	13	7.9
45-49	10	10.6	5	7.0	15	9.1
50-54	8	8.5	5	7.0	13	7.9
55-59	9	9.6	3	4.2	12	7.3
60-64	4	4.3	4	5.6	8	4.9
65 or over	6	6.4	2	2.8	8	4.9
Total	94	14.9	71	11.3	165	13.3

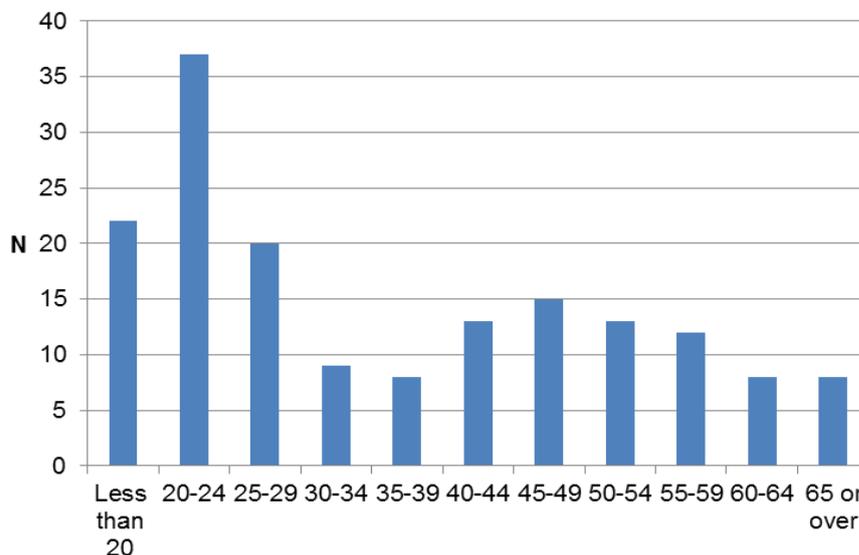
**Figure 29. Total respondent age profile for northern beef**

Table 42 demonstrates the age category of respondents by gender within the southern beef, lamb and sheep meat sector for 2013. In contrast to the result found for the northern beef sector, the majority of male respondents (20%) in the southern beef, lamb and sheep meat sector were 65 years of age or more (see Figure 30). Further, a general trend emerged where the proportion of male respondents increased as age increased.

Whilst no clear pattern emerged for females, the majority of respondents (17%) were in the 40-44 age category and slightly fewer in the 20-24 age category (14%).

Table 42. Age profile by gender - southern beef, lamb and sheep meat 2013

	<i>Male</i>		<i>Female</i>		<i>Total</i>	
	N	%	N	%	N	%
Less than 20	7	5.1	4	11.4	11	6.3
20-24	10	7.3	5	14.3	15	8.6
25-29	8	5.8	3	8.6	11	6.3
30-34	6	4.4	1	2.9	7	4.0
35-39	11	8.0	3	8.6	14	8.1
40-44	10	7.3	6	17.1	17	9.8
45-49	12	8.8	4	11.4	17	9.8
50-54	17	12.4	3	8.6	20	11.5
55-59	15	11.0	4	11.4	19	10.9
60-64	14	10.2	0	0.0	14	8.1
65 or over	27	19.7	2	5.7	29	16.7
Total	137	5.1	35	11.4	174	6.3

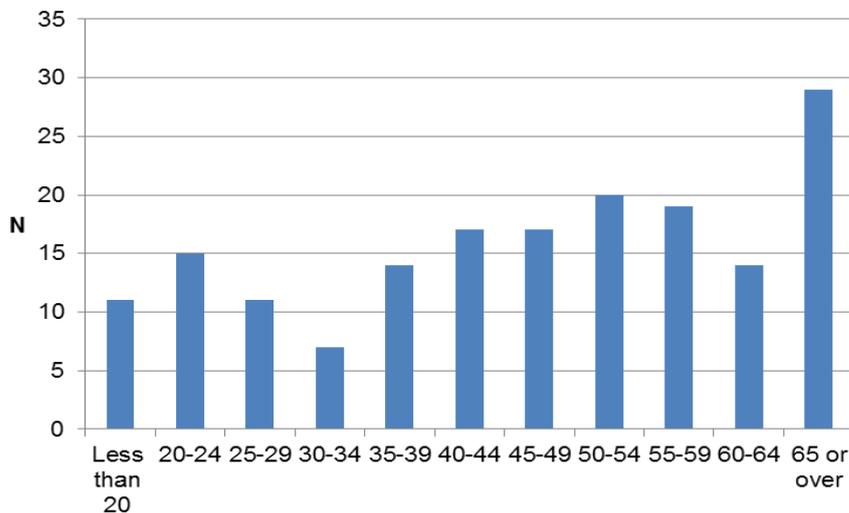
**Figure 30. Total respondent age profile for southern beef, lamb and sheep meat**

Table 43 demonstrates respondent employment status according to industry sub-sector for 2013. The vast majority of respondents were employed full-time as permanent employees for both the northern beef sector (75%) and southern beef, lamb and sheep meat sector (66%).

Table 43. Respondent employment status

<i>Industry Sector</i>	<i>Northern Beef</i>		<i>Southern Beef, Lamb, & Sheep Meat</i>		<i>Total Red Meat</i>	
	N	%	N	%	N	%
Family worker receiving pay	8	5.9	19	16.4	33	11.2
Contributing family worker not receiving pay	7	5.2	12	10.3	24	8.1
Full-time, permanent employee	101	74.8	76	65.5	204	69.2
Part-time employee	10	7.4	5	4.3	17	5.8
Temporary employee	9	6.7	4	3.5	17	5.8
Other	6	4.3	6	4.9	21	7.1
Total	141		122		295	

Table 44 below demonstrates the breakdown of respondent role type across industry sub-sectors. For the northern beef sector the greatest proportion of respondents were in operational roles (48%) followed by managers (24%). For the southern beef, lamb and sheep meat sector, the greatest proportion of respondents were managers (48%) followed by those in operational roles (23%). Few administration staff or apprentice/trainees responded to the survey.

Table 44. Respondent role type

	<i>Northern Beef</i>		<i>Southern Beef, Lamb, & Sheep Meat</i>		<i>Total Red Meat</i>	
	N	%	N	%	N	%
Managers	33	24.4	58	47.9	116	38.2
Operational	65	48.1	28	23.1	108	35.5
Specialists	12	8.9	9	7.4	25	8.2
Supervisors	10	7.4	14	11.6	24	7.9
Admin	9	6.7	6	5.0	18	5.9
Apprentice/Trainees	6	4.4	6	5.0	13	4.3
Total	135		121		304	

8 Appendix B – Summary of survey findings by sector

Total Red Meat

Sample	<ul style="list-style-type: none"> • N = 396
Farm sizes	<ul style="list-style-type: none"> • Large = 20.20%, Medium = 32.83%, Small = 46.97%
Age	<ul style="list-style-type: none"> • 34.9% under 30 years and 35.4% 50+ • Large farms have younger age profile (64% under 30 years)
Recruitment difficulties	<ul style="list-style-type: none"> • 72.33% have difficulty in peak time and 50% in non-peak • Finding station hands • Shortage of skilled people • Wages/salaries considered too low • Losing skilled workers to mining
Factors that attract employees to the on-farm red meat industry	<ul style="list-style-type: none"> • Family background working on a farm • Lifestyle • Working with animals • Working outdoors • Variety in job
Recruitment methods	<ul style="list-style-type: none"> • Asking local people and asking for referrals from employees were commonly used methods • Employees heard about their jobs by being approach directly by the employer or through family

Reasons for leaving employer	<ul style="list-style-type: none"> • Better career opportunities elsewhere • Boring or unchallenging duties • Poor leadership and communication from management/supervisors
Reasons left mining	<ul style="list-style-type: none"> • Unsuitable lifestyle • Working too many hours • Job duties boring or unchallenging
Engagement	<ul style="list-style-type: none"> • 62.76% (score out of 100% in Employment Engagement Index), 55.72% (score out of 100% in Employment Satisfaction Index)
Engagement drivers	<ul style="list-style-type: none"> • Being trusted and valued • Managers concerned with developing individuals and building a supportive environment • Overall job satisfaction • Effective communication between managers and staff • Attractive conditions of employment i.e. hours, leave, non-cash items
Retention	<ul style="list-style-type: none"> • 61.48% certain of having a long term future with the farm/company
Plans for 1 year	<ul style="list-style-type: none"> • 47.75% same job and same employer • 10.2% same job better qualified • 6.3% more senior job, better qualified • 6.3% farm owner • 5.11% same job different employer • 4.8% more senior job • 2.4% leave industry

Plans for 5 years	<ul style="list-style-type: none"> • 19.10% same job and same employer • 13.48% more senior job, better qualified • 13.2% farm owner • 10.96% same job better qualified • 8.15% more senior job • 6.46% same job different employer • 6.46% completely different job within the industry • 4.49% leave industry
Key retention drivers	<ul style="list-style-type: none"> • Work engagement • Work morale • Overall job satisfaction • Strong leadership and clear direction • Working as a team
Effective retention methods used	<ul style="list-style-type: none"> • Allowing flexible working hours • Increasing salary • Providing training, qualifications • Providing time off in lieu of hours worked
Workload sustainability	<ul style="list-style-type: none"> • 64.07% at risk • 67.44% work 46-52 weeks per year
Culture	<ul style="list-style-type: none"> • Good relationship with manager/supervisor • Good relationship with colleagues/co-workers

	<ul style="list-style-type: none"> • Understand what is expected of me in my job • Trusted and valued as a person • Job is interesting
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Sub-sector comparison

Please note that not all respondents gave information about their regional location and as such their sub-sector category could not be determined. As a result the below analysis does not include all respondents to the survey.

	Northern Beef	Southern Beef
Sample	<ul style="list-style-type: none"> • N = 166 (41% of total) 	<ul style="list-style-type: none"> • N = 178 (44% of total)
Farm sizes	<ul style="list-style-type: none"> • Large = 31.93%, Medium = 37.95%, Small = 30.12% 	<ul style="list-style-type: none"> • Large = 10.67%, Medium = 29.21%, Small = 60.11%
Age	<ul style="list-style-type: none"> • 47% under 30 years and 25% 50+ • Younger employees come from large farms (71.15% under 30) and medium farms (53.97% under 30) 	<ul style="list-style-type: none"> • 21% under 30 years and 47.1% 50+ (including 16.7% 65 years or older) • Older employees come from small farms (30% are 60 and over)
Recruitment difficulties	<ul style="list-style-type: none"> • 90% have difficulty in peak time and 71.74% in non-peak • Finding station hands • Shortage of skilled people • Losing skilled workers to mining • Wages/salaries considered too low 	<ul style="list-style-type: none"> • 64% have difficulty in peak time and 39% in non-peak • Finding station hands • Shortage of skilled people • Wages/salaries considered too low • Lack of existing workers in the industry being skilled up

Factors that attract employees to the on-farm red meat industry	<ul style="list-style-type: none"> • Family background working on a farm • Lifestyle • Working with animals • Working outdoors • Variety in job 	<ul style="list-style-type: none"> • Family background working on a farm • Lifestyle • Working outdoors • Working with animals • Variety in job
Recruitment methods	<ul style="list-style-type: none"> • Asking local people and asking for referrals from employees were commonly used methods • Employees heard about their jobs most commonly by being approach directly by the employer or through family 	<ul style="list-style-type: none"> • Asking local people and asking for referrals from employees were commonly used methods • Employees heard about their jobs through it being a family business already, or being approach directly by the employer
Reasons for leaving employer	<ul style="list-style-type: none"> • Better career opportunities elsewhere • Boring or unchallenging duties • Poor leadership and communication form management/supervisors 	<ul style="list-style-type: none"> • Better career opportunities elsewhere • Boring or unchallenging duties
Reasons left mining	<ul style="list-style-type: none"> • Unsuitable lifestyle • Job duties boring or unchallenging • Working too many hours 	<ul style="list-style-type: none"> • Unsuitable lifestyle • Better career opportunities elsewhere
Engagement	<ul style="list-style-type: none"> • 60.87% (score out of 100% in Employment Engagement Index), 55.72% (score out of 100% in Employment Satisfaction Index) 	<ul style="list-style-type: none"> • 63.33% (score out of 100% in Employment Engagement Index), 56.19% (score out of 100% in Employment Satisfaction Index)
Engagement drivers	<ul style="list-style-type: none"> • Being open and honest with each other • Being trusted and valued • Having opportunities to get ahead in my career 	<ul style="list-style-type: none"> • Managers concerned with setting performance targets and achieving results • Managers concerned with developing individuals and building a supportive environment

	<ul style="list-style-type: none"> • Receiving fair pay for the work done • Overall job satisfaction 	<ul style="list-style-type: none"> • Good relationship with supervisor/manager • Committed to environmentally sustainable use of resources • Accomodation is of a good standard
Retention	<ul style="list-style-type: none"> • 55.88% certain of having a long term future with the farm/company 	<ul style="list-style-type: none"> • 69.17% certain of having a long term future with the farm/company
Plans for 1 year	<ul style="list-style-type: none"> • 49.04% same job and same employer • 11.46% same job better qualified • 5.10% more senior job, better qualified • 4.46% same job different employer • 4.46% more senior job • 3.82% completely different job within the industry • 2.55% leave industry 	<ul style="list-style-type: none"> • 47.48% same job and same employer • 10.79% same job better qualified • 6.47% more senior job, better qualified • 6.47% same job different employer • 4.32% more senior job • 3.86% in a permanent job • 2.55% leave industry
Plans for 5 years	<ul style="list-style-type: none"> • 15.29% more senior job, better qualified • 12.94% same job and same employer • 10.59% farm owner • 9.41% same job better qualified • 8.24% completely different job within the industry • 7.06% same job different employer • 6.47% leave industry 	<ul style="list-style-type: none"> • 25% same job and same employer • 13.46% farm owner • 12.18% more senior job, better qualified • 10.26% same job better qualified • 10.26% more senior job • 6.41% in a permanent job • 5.13% same job different employer • 2.56% leave industry
Key retention drivers	<ul style="list-style-type: none"> • Work engagement 	<ul style="list-style-type: none"> • Work engagement • Strong leadership and clear direction for the

	<ul style="list-style-type: none"> • Work morale • Overall job satisfaction • Recognition for a job well done • Ability to contribute to decisions made at work 	<p>business</p> <ul style="list-style-type: none"> • Making good use of abilities and skills in the job • Recognition for a job well done • Pride in the farm
Effective retention methods used	<ul style="list-style-type: none"> • Increasing salary • Allowing flexible working hours • Providing time off in lieu of hours worked • Providing training, qualifications 	<ul style="list-style-type: none"> • Allowing flexible working hours • Increasing salary • Providing training, qualifications • Providing time off in lieu of hours worked
Workload sustainability	<ul style="list-style-type: none"> • 64.42% at risk • 55.70% work 46-52 weeks per year (larger farm employees work fewer weeks) 	<ul style="list-style-type: none"> • 63.84% at risk • 77.06% work 46-52 weeks per year (owner/managers of small farms work more weeks)
Culture	<ul style="list-style-type: none"> • Good relationship with manager/supervisor • Being proud to be working for the station/company • Good relationships with colleagues • Family or community atmosphere at work • Working as a team 	<ul style="list-style-type: none"> • Good relationship with manager/supervisor • Understand what is expected of me at work • Being proud to be working for the station/company • Being trusted and valued as a person • Good relationships with colleagues