



# Power of People 2024 Workforce Survey

August 2024



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## Dairy Australia

### Strategic priority 2: Attract and develop great people for dairy

Dairy Australia's Strategic Plan has six priorities that guide investment to deliver improved profitability and a more sustainable dairy industry.

The second of the strategic priorities is focussed on attracting and developing great people for dairy. The plan acknowledges that people are at the heart of the industry.

### A context

Good staff can be the conduit to a successful and well-run dairy business while less capable staff can severely inhibit the farm business from reaching its potential. Dairy Australia has reflected the criticality of this area of farm operations and businesses in the 2020 – 2025 Strategic Plan .



To assist the Dairy Australia teams in understanding the needs and experiences of dairy farmers in relation to their workforce, a program of workforce surveys was undertaken. This included a baseline study in 2017 and then a follow up survey in 2020.

Now several years on and the industry existing the challenging COVID-19 period, Dairy Australia has requested an updated on the workforce experiences and needs of dairy farmers.

*The Power of People: 2024 Workforce Survey* collected feedback from n = 400 dairy farmers nationally. The information was collected over the period 10<sup>th</sup> – 24<sup>th</sup> July 2024.

## The state of play

(Source : Dairy Australia, Situation and Outlook, May 2024)

### Confidence strong and stable

Australian dairy farmers have been largely insulated from global dairy market pressures this season, with a strong milk price, improved weather conditions and overall stable input costs providing grounds for profitability.

Confidence in the Australian dairy industry is currently in its most stable period in a decade. Despite increased climate and market volatility over the last four years, the proportion of farming businesses feeling positive about the industry's future has remained relatively steady (68 per cent in 2024) over that time. Farmers are also feeling positive about their own businesses (83 per cent) and the vast majority are expecting to make an operating profit this season. Back-to-back profitable seasons have led to a growing number of farming businesses reporting they are in a "stable and happy" position.

### Inputs – getting under control?

While drier conditions have persisted in some dairying regions, timely rainfall has bolstered winter feed production and crop prospects in others. On balance, this is expected to support feed availability into the 2024/25 season, keeping prices relatively steady. Additionally, indicative fertiliser prices are also expected to remain under pressure, and temporary water prices remain historically low.

### Production

On account of more moderate seasonal conditions, Australian milk production has bounced back from the lows of 2022/23, likely ending the 2023/24 season between 2 to 3 per cent above 8.13 billion litres. While this growth has been further supported by robust milk prices and easing input costs, expectations for 2024/25 are weighted towards a small decrease in national milk production.

These observations provide some context for understanding farmers responses to the Power of People: 2024 Workforce Survey.

**Results snapshot,  
observations & insights**

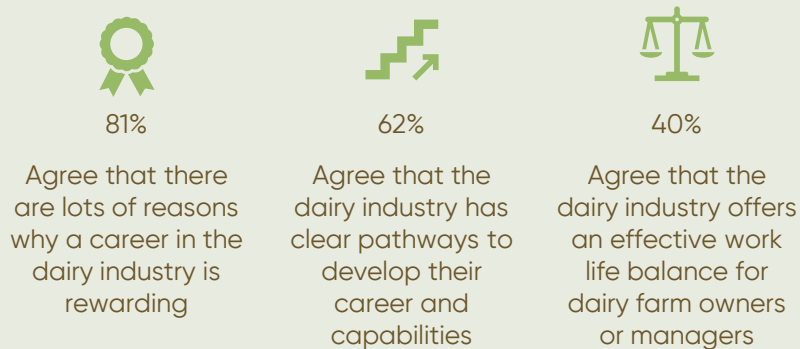


## Employer profile

--- What is the profile of the employer (respondent)? ---



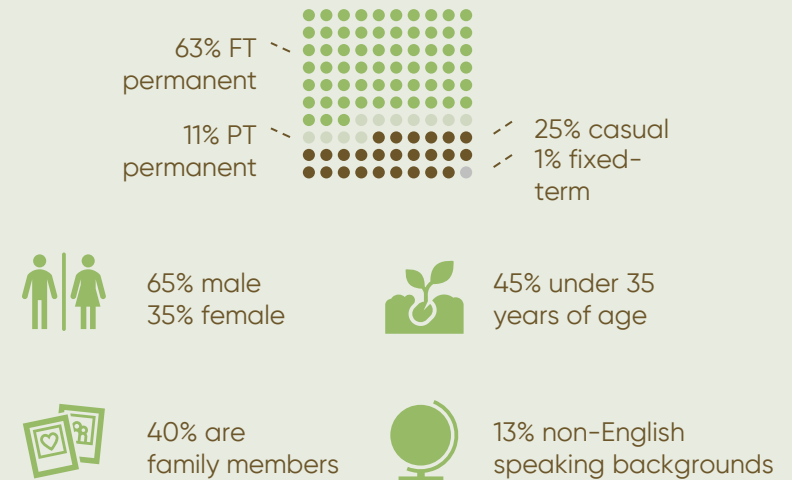
--- Their perspective of working in the dairy industry ---



## Workforce profile



----- What is the profile of the dairy workforce? -----

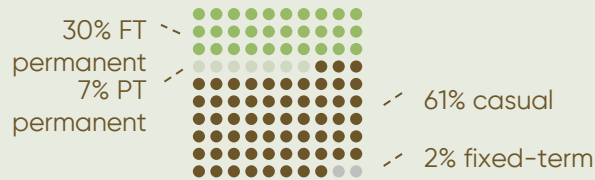


## Recruitment experiences



**46%** have recruited at least one staff member over the last 12 months...

### Who did they recruit?



61% male  
39% female



52% new to industry

### How was their most recent experience (last 12 months)?



83%

Used word of mouth / other farmers (59%) and/or social media (46%) to recruit



9.6

Average # weeks from job opening to position filled

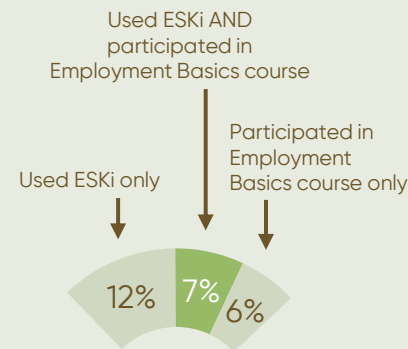


26%

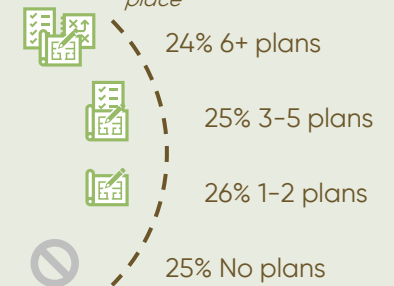
Reported finding it easy to recruit new staff (in general)

## Recruitment and people management practices

### What recruitment practices have they used?



### # of formal written plans in place



### What's in place to help keep / retain their employees?



35%

Benefits



35%

Hours



33%

Remuneration



18%

Training & Support



8%

Work Environment

## Workforce: The Power of People: 2024 Workforce Survey

Feedback from dairy farmers across Australia provided information and insights into a range of workforce-related measures, behaviours and perceptions. A summary of some of the key insights now follow.

### Observations & insights

As noted in the recent In Focus\* report from the dairy industry, *'falling farm numbers reflects a world-wide trend in agriculture. Changing business practices have encouraged a shift to larger, more intensive production systems with greater economies of scale. However, while the number of farms across Australia has declined, the average herd size continues to grow. In 1985, the average herd size was 93 cows; this has grown to 305 cows in 2022/23. There is also an emerging trend of large farm operations milking more than 700 cows.'*

This trend is one of the contributing factors to an increase in the reported average workforce size (including farmers and everyone who works on farm) to 5.9 (up from 5.1 in 2020).

Clearly the result varies across the different farm sizes with the larger farms requiring a larger workforce and similarly the smaller farm operations requiring fewer staff.

Analysis of the feedback provided in the 2024 Workforce Survey shows that:

- There was, on average 3.8 of the 5.9 workforce (or 63%) employed as a full-time permanent employee. The remaining are either casuals, part-time permanent staff or those on fixed term contracts.
- Family members make up a sizeable proportion of a dairy farm's average workforce (40%).
- While representation of First Nations staff remains very low, non-English speaking staff make up around one in eight staff (13%).
- Females make up just over one in three of the average workforce (35%).

The results provide an important foundation for developing processes and practices to help support dairy farmers in the current operating environment.



5.9 people  
currently on farm



3.8 full-time permanent



0.6 part-time permanent



1.5 casual



<0.1 fixed-term contract

## *The ongoing challenge of recruitment*

Dairy farmers are active in the recruitment market, with 46% reporting they had recruited for at least one position in the last 12 months. This is consistent with the level of recruitment activity reported in the 2020 research (47%).

Of these recent recruitments, the feedback indicates that:

- Around one in two (52%) are new to the dairy industry
- Full time permanent (30%) and casual staff (61%) make up most of the positions recruited
- 39% of recent recruitments were female
- 42% of farmers who recently recruited reported they had employed overseas workers.

For their most recent recruitment, farmers reported the process (from job opening to position filled) took on average 9.6 weeks, with 69% being filled within one month.

The time, energy and resources to recruit new staff to the farm continues to challenge dairy farmers with just over one in four (26%) of farmers who recently recruited describing the process as somewhat easy or very easy, with almost one in two (48%) describing it as somewhat difficult or very difficult.

Looking forward, a more conservative 30% of dairy farmers reported they intend to recruit over the next 12 months.

## *Limited utilisation of the Dairy Australia recruitment resources*

The 2024 Workforce Survey measures use of two recruitment resources – ESKi and the Employment Basics course. Right now, around three in four farmers (74%) have not made use of either of the resources. Less than one in ten (7%) have utilised both, while the remaining have used one of the other.

There remains ample upside to expand use of these support recruitment resources.



46% of farmers recruited in the last 12 months



22% of farmers let go of at least one staff member in the last 12 months



30% of farmers expect to be recruiting in the next 12 months



## People management practices

The survey feedback highlighted variable use of the ten people management practices measured. While the most common practice was payslips, the least used practice were performance reviews/appraisals. About one in four used 6 or more of these practices while an equivalent proportion of farmers (25%) reported using none of these. This was not surprisingly more the case among farms with very small workforces.

Farmers were also asked to indicate what retention levers they use. This was done in an unprompted way so reflects a top of mind recall of the levers being used. From the feedback we note that:

- One in three use benefits like accommodation, food and beverage, fuel and vehicles;
- One in three reported using flexible hours or rostered time off;
- One in three used remuneration (paying above Award, bonuses, promotion, etc.);
- About one in five use training and support; while
- Less than one in ten reported the creation of a strong workplace environment.

## A slow burn on written farm safety plans and SOPs, but on-farm practices are in play

The challenge of encouraging farmers to formalise their Work Health and Safety plans continues to remain a challenge for the industry. Just under six in ten (58%, up 2% on 2020) of dairy farmers reported they had a written plan, with just two in three (or 67% of farmers with a written plan) having updated their plan in the last 2 years.

The survey also measured farmers uptake of four key safety-related practices. Almost all farmers reported undertaking at least one of these (90%), with just under half (48%) adopting all four practices. There were uplifts on three of the four measures since the 2020 survey.

So, while progress on developing and maintaining a written plan has been slow, farmers are reporting using more work health and safety practices on farm.

Consistent with the 2020 research, some 19% of farmers reported staff had acquired an injury or illness requiring time off (16% in 2020).

Only modest improvement in the use of Standard Operating Procedures (SOPs) for vehicles used on-farm has been achieved over the past few years. Just under one in three (30% down from 33% in 2020) of farmers directly reported they do not have SOPs for their farm vehicles.



35% Benefits



35% Hours



33% Remuneration



18% Training & Support



8% Work Environment



58% of farmers have a written WH&S plan



19% of farmers have had an injury on-farm requiring at least one day off

## ***Not all farmers and farm business are the same***

Analysis of the 2024 survey feedback illustrates differences in behaviours and practices between cohorts of dairy farmers, including:

- Differences across farms with different workforce sizes (farm size). While the challenges of running a larger workforce will be different to a small farm business, there were differences evident based on the feedback provided. For example, the data shows that:
  - Not surprisingly, larger farms are more active recruiters (78% recruited in the last 12 months);
  - They are somewhat more likely to recruit staff from outside the dairy industry, in particular overseas workers;
  - They are more likely to have used or consider using the Employment Basics course;
  - Are more likely to have written people management practices;
  - Report using more levers to retain staff; and
  - Are more likely to undertake on-farm health and safety practices.

While there were differences, the results also indicate that they find recruitment as difficult as smaller farm businesses.

- While it is unsurprising that farm businesses with an 'expansion' posture have different results to the other cohorts, the analysis indicates the specific challenges for farms who self-report as 'winding down'. This transitional cohort are typically smaller operations (perhaps having commenced the transition) but still require at times to recruit staff and face the challenges of retaining their existing staff.

However, from the feedback from this cohort we see signals that they typically:

- Find recruitment not as easy as other farmers;
- Are less likely to have used ESKI or the Employment Basics course;
- Are more likely to not have any written people management plans in place; and
- Are less likely to have a written Work Health and Safety plan or report using safety practices on farm.

The data indicates that the behaviours of this cohort are dampening the overall results.

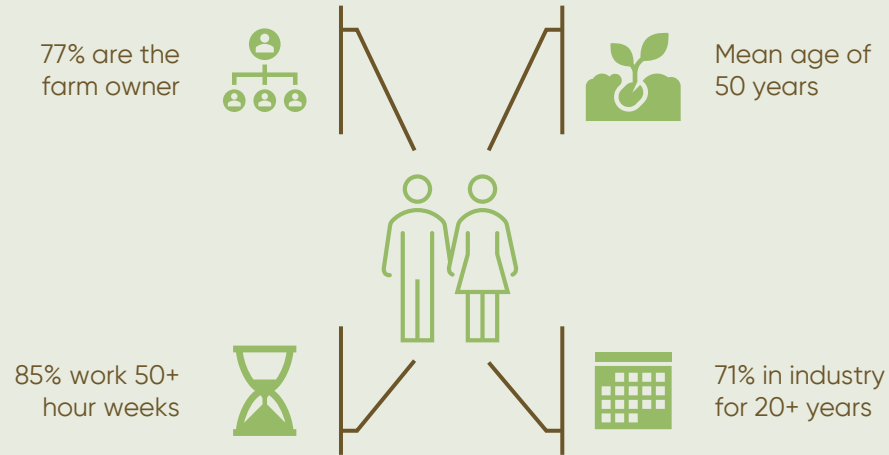
The results suggest that achieving behavioural and practice change (relevant to some of the measures in this survey) are unlikely to be achieved with this cohort of farmers and that for the 'winding down' cohort, a different approach may be required to help them navigate their transition.

This concludes a short summary of the insights from *the Power of People: 2024 Workforce Survey*. The detailed results for the survey now follow.

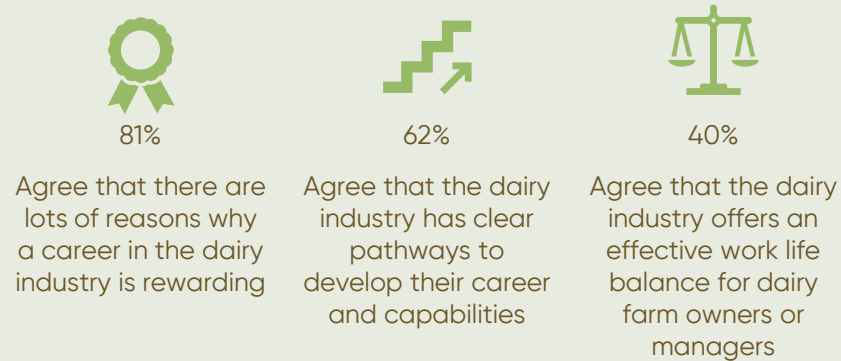
**Farmer feedback:**  
*Employer profile*



----- ***What is the profile of the employer (respondent)?*** -----



----- ***Their perspective of working in the dairy industry*** -----

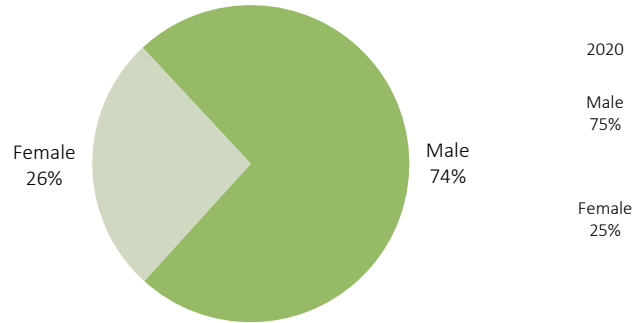


# Module 1: Employer profile

## Information about the employer

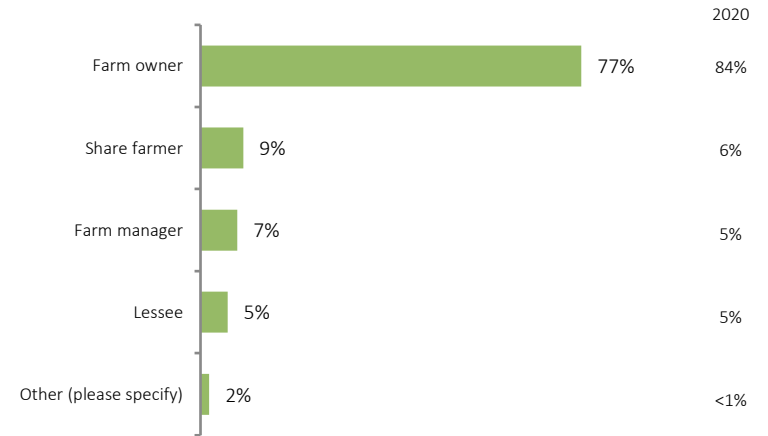
Q1. Gender of respondent

Base: All farmers, n = 400



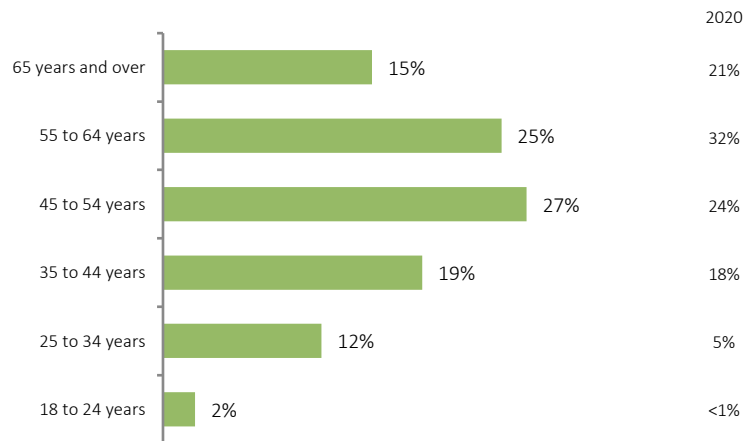
Q3. Are you the..?

Base: All farmers, n = 400



Q2. Which of the following age groups do you belong to?

Base: All farmers, n = 400



Mean age: 50 years

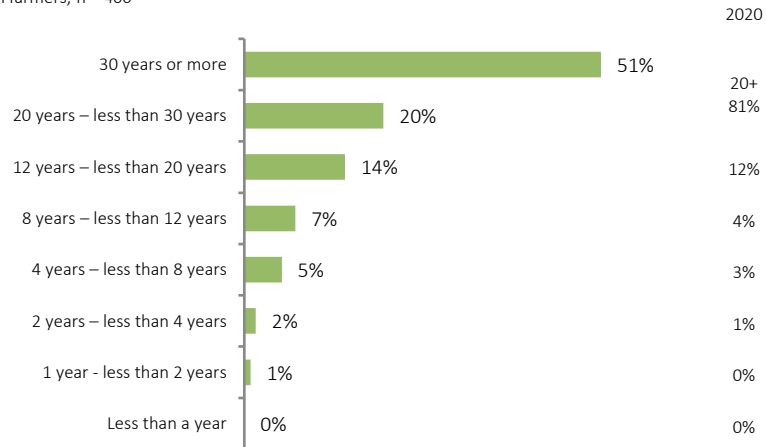
2020: 54 years

# Module 1: Employer profile

## Information about the employer

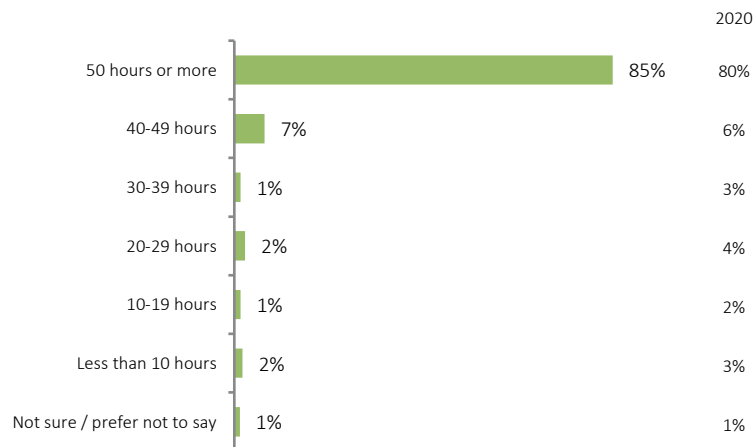
Q8. How long have you worked in the dairy industry?

Base: All farmers, n = 400



Q9. On average over the last 12 months, how many hours would you work in a typical week?

Base: All farmers, n = 400

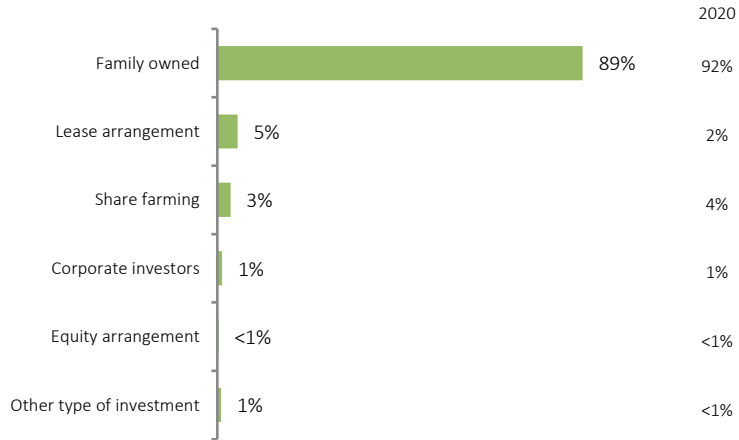


# Module 1: Employer profile

## Information about the dairy business

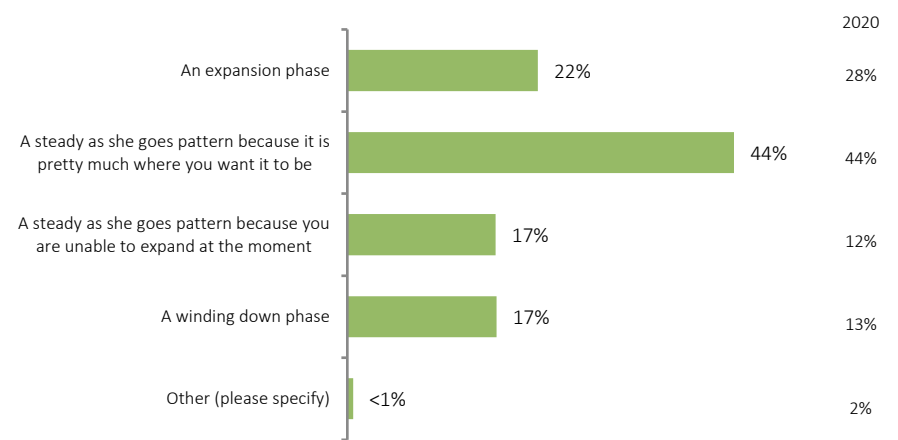
Q5. How would you describe the ownership/management structure of your dairy enterprise?

Base: All farmers, n = 400



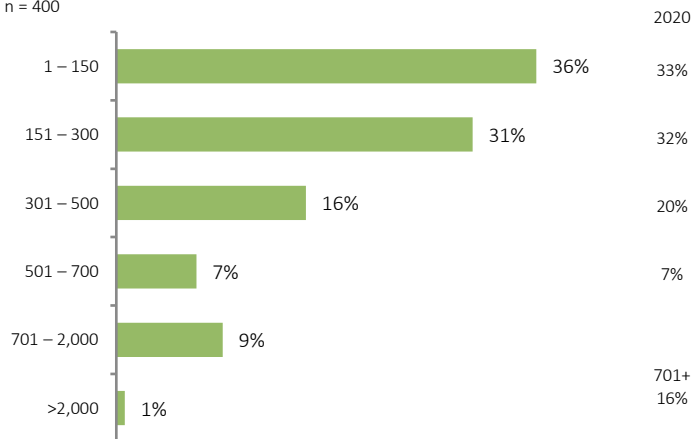
Q7. How would you describe the phase your dairy enterprise is currently in? Is it...

Base: All farmers, n = 400



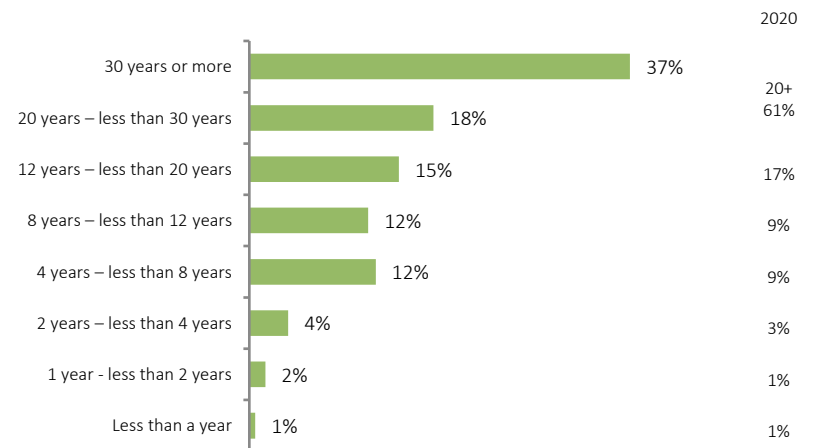
Q6. Approximately how many cows were calved down this past financial year, that is, 2023-2024?

Base: All farmers, n = 400



Q4. How long have you owned this dairy farm business?

Base: All farmers who identified as the farm owner, n = 306



# Module 1: Employer profile

## Employer perceptions

Q10. Do you agree or disagree with the following statements about working in the dairy industry?

Base: All farmers, n = 400





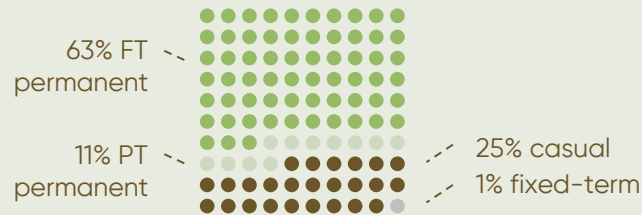
**Farmer feedback:**  
*Workforce profile*





**5.9** reported staff in the average dairy farm workforce (including themselves)...

----- **What is the profile of the dairy workforce?** -----



65% male  
35% female



45% under 35  
years of age



40% are  
family members



13% non-English  
speaking backgrounds

# Module 2: Current workforce profile

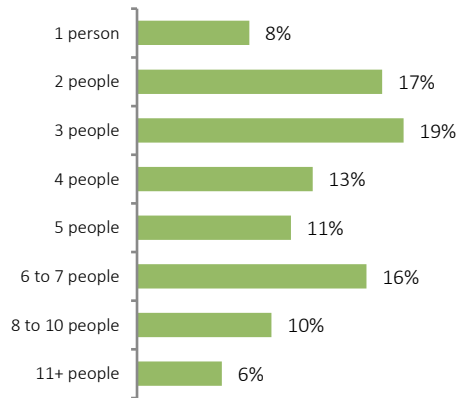
## How many staff on farm?

Q11. Including yourself, how many people currently work on your farm in permanent, fixed term, or and casual positions?

Base: All farmers, n = 400

5.9 people currently on farm  
(total number of people on farm, averaged across all responses)

2020: 5.1



| Icon | Value | % of workforce | Category            | 2020 |
|------|-------|----------------|---------------------|------|
|      | 3.8   | 63%            | full-time permanent | 2.9  |
|      | 0.6   | 11%            | part-time permanent | 0.9  |
|      | 1.5   | 25%            | casual              | 1.1  |
|      | <0.1  | 1%             | fixed-term contract | 0.2  |

|                       | Herd Size    |                  |                 |                   | Workforce Size |            |            |           | Phase of Dairy Business |                             |                           |              |
|-----------------------|--------------|------------------|-----------------|-------------------|----------------|------------|------------|-----------|-------------------------|-----------------------------|---------------------------|--------------|
|                       | Small (<150) | Medium (151-300) | Large (301-500) | X-XX Large (>501) | 1-2 people     | 3-4 people | 5-6 people | 7+ people | Expansion               | Steady – where I want to be | Steady – unable to expand | Winding down |
| Base (n =)            | 79           | 133              | 92              | 96                | 60             | 124        | 113        | 103       | 94                      | 185                         | 67                        | 52           |
| Total # of people     | 3.0          | 3.9              | 5.5             | 16.2              | 1.7            | 3.4        | 5.5        | 15.7      | 11.6                    | 4.7                         | 4.9                       | 3.1          |
| # full-time permanent | 1.6          | 2.3              | 3.3             | 11.5              | 1.3            | 2.2        | 3.0        | 10.2      | 7.9                     | 2.9                         | 2.7                       | 1.8          |
| # part-time permanent | 0.3          | 0.5              | 0.8             | 1.5               | 0.1            | 0.5        | 0.6        | 1.6       | 1.1                     | 0.6                         | 0.5                       | 0.2          |
| # casual              | 1.0          | 1.1              | 1.5             | 3.2               | 0.3            | 0.7        | 1.8        | 3.9       | 2.5                     | 1.2                         | 1.6                       | 1.0          |
| # fixed-term contract | <0.1         | 0.1              | <0.1            | <0.1              | <0.1           | <0.1       | 0.1        | <0.1      | <0.1                    | <0.1                        | <0.1                      | 0.1          |

## Module 2: Current workforce profile

# Information about the workforce

|   |     | % of workforce |                    |
|---|-----|----------------|--------------------|
| Q12. How many of these [Q11 ANSWER] workers are family members?<br>Base: All farmers, n = 400 | 2.4 | 40%            | Family members     |
|   | 3.5 | 60%            | Non-family members |

|  |      | % of workforce |                              |
|--|------|----------------|------------------------------|
| Q14. How many are...<br>Base: All farmers, n = 400 | 3.9  | 65%            | Male                         |
|  | 2.0  | 35%            | Female                       |
|  | <0.1 | <1%            | Non-binary                   |
|  | <0.1 | <1%            | Not sure / prefer not to say |

|  |     | % of workforce |                              |
|--|-----|----------------|------------------------------|
| Q13. How many workers in total are aged...<br>Base: All farmers, n = 400 | 0.3 | 5%             | Under 18                     |
|  | 2.4 | 40%            | 18-34                        |
|  | 1.0 | 17%            | 35-44                        |
|  | 0.9 | 15%            | 45-54                        |
|  | 0.9 | 15%            | 55-64                        |
|  | 0.5 | 8%             | 65 or older                  |
|  | 0.0 | 0%             | Not sure / prefer not to say |

|   |      | % of workforce |  |
|---|------|----------------|--|
| Q15. How many are of Aboriginal or Torres Strait Islander origin?<br>Base: All farmers, n = 400 | <0.1 | 1%             | Aboriginal                                   |
|   | 0.1  | 1%             | Torres Strait Islander                       |
|   | 5.7  | 97%            | Neither Aboriginal or Torres Strait Islander |
|   | <0.1 | 1%             | Not sure / prefer not to say                 |

|   |      | % of workforce |  |
|---|------|----------------|--|
| Q16. How many are from non-English speaking backgrounds or have English as their second language?<br>Base: All farmers, n = 400 | 0.7  | 13%            | Non-English speaking backgrounds / English second language |
|   | 5.1  | 87%            | N/A – English as a first language                          |
|   | <0.1 | 1%             | Not sure / prefer not to say                               |

# Module 2: Current workforce profile

## Information about the workforce

Q17. Of the [Q11 ANSWER] workers (including yourself), how many are...?  
 Base: All farmers, n = 400



full-time and part-time permanent staff



Q18. How many of these [INSERT PERMANENT STAFF RESULT FROM Q17] permanent staff members (including yourself) have been working for you for...  
 Base: All farmers, n = 400

|      | % of permanent workforce |                              |
|------|--------------------------|------------------------------|
| 0.7  | 15%                      | 1 year or less               |
| 1.1  | 26%                      | Between 1 and 3 years        |
| 0.4  | 10%                      | Between 3 and 5 years        |
| 0.2  | 5%                       | Between 5 and 7 years        |
| 0.3  | 7%                       | Between 7 and 10 years       |
| 1.6  | 37%                      | More than 10 years           |
| <0.1 | <1%                      | Not sure / prefer not to say |

|                              | Herd Size    |                  |                 |                   | Workforce Size |            |            |           | Phase of Dairy Business |                             |                           |              |
|------------------------------|--------------|------------------|-----------------|-------------------|----------------|------------|------------|-----------|-------------------------|-----------------------------|---------------------------|--------------|
|                              | Small (<150) | Medium (151-300) | Large (301-500) | X-XX Large (>501) | 1-2 people     | 3-4 people | 5-6 people | 7+ people | Expansion               | Steady – where I want to be | Steady – unable to expand | Winding down |
| Base (n = )                  | 79           | 133              | 92              | 96                | 60             | 124        | 113        | 103       | 94                      | 185                         | 67                        | 52           |
| Total # of permanent staff   | 2.0          | 2.7              | 4.0             | 13.0              | 1.4            | 2.6        | 3.6        | 11.8      | 9.0                     | 3.5                         | 3.3                       | 2.0          |
| 1 year or less               | 0.1          | 0.3              | 0.5             | 2.7               | 0.1            | 0.3        | 0.4        | 2.3       | 1.8                     | 0.4                         | 0.4                       | 0.1          |
| Between 1 and 3 years        | 0.1          | 0.4              | 0.7             | 5.1               | <0.1           | 0.2        | 0.7        | 4.3       | 3.5                     | 0.6                         | 0.5                       | 0.2          |
| Between 3 and 5 years        | 0.1          | 0.2              | 0.4             | 1.5               | <0.1           | 0.2        | 0.4        | 1.3       | 1.0                     | 0.3                         | 0.2                       | 0.1          |
| Between 5 and 7 years        | 0.1          | 0.1              | 0.2             | 0.7               | 0.1            | 0.2        | 0.2        | 0.6       | 0.4                     | 0.2                         | 0.2                       | 0.1          |
| Between 7 and 10 years       | 0.1          | 0.3              | 0.3             | 0.9               | 0.1            | 0.2        | 0.3        | 0.9       | 0.5                     | 0.4                         | 0.2                       | <0.1         |
| More than 10 years           | 1.4          | 1.5              | 1.9             | 2.1               | 1.2            | 1.5        | 1.7        | 2.3       | 1.8                     | 1.6                         | 1.6                       | 1.5          |
| Not sure / prefer not to say | 0.0          | 0.0              | 0.0             | 0.1               | 0.0            | 0.0        | 0.0        | <0.1      | 0.0                     | <0.1                        | 0.0                       | 0.0          |

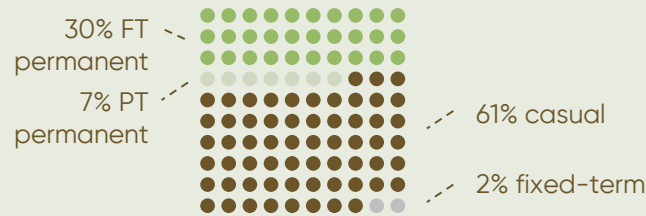
**Farmer feedback:**  
*Recruitment experiences*





**46%** have recruited at least one staff member over the last 12 months...

----- **Who did they recruit?** -----



61% male  
39% female



52% new to industry

----- **How was their most recent experience (last 12 months)?** -----



83%

Used word of mouth / other farmers (59%) and/or social media (46%) to recruit



9.6

Average # weeks from job opening to position filled



26%

Reported finding it easy to recruit new staff (in general)

# Module 3: Recruitment experiences

## Recent recruitment

Q19. How many staff have you recruited over the last 12 months? This can include any permanent, casual, full time or part time staff.

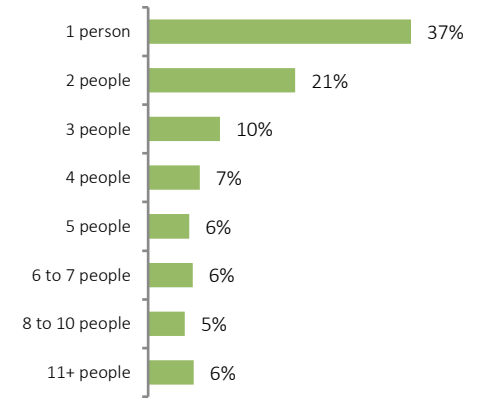
Base: All farmers, n = 400

54% of farmers did not recruit over the last 12 months.

Of the 46% that did recruit... (2020: 47% recruited)

4.0 staff recruited in the last 12 months  
(total number of people recruited, averaged across all responses)

2020: 2.8



|                                   | Herd Size    |                  |                 |                   | Workforce Size |            |            |           | Phase of Dairy Business |                             |                           |              |
|-----------------------------------|--------------|------------------|-----------------|-------------------|----------------|------------|------------|-----------|-------------------------|-----------------------------|---------------------------|--------------|
|                                   | Small (<150) | Medium (151-300) | Large (301-500) | X-XX Large (>501) | 1-2 people     | 3-4 people | 5-6 people | 7+ people | Expansion               | Steady – where I want to be | Steady – unable to expand | Winding down |
| Base (n =)                        | 79           | 133              | 92              | 96                | 60             | 124        | 113        | 103       | 94                      | 185                         | 67                        | 52           |
| % recruited in the last 12 months | 22%          | 47%              | 64%             | 78%               | 15%            | 38%        | 63%        | 78%       | 62%                     | 41%                         | 59%                       | 28%          |
| Total # recruited                 | 2.9          | 2.6              | 2.8             | 7.2               | 2.0            | 2.2        | 3.0        | 6.8       | 5.9                     | 3.3                         | 3.0                       | 3.5          |

The above result can be translated to an overall industry recruitment estimate as shown opposite.

Recruitment:  
1.8  
Staff recruited  
last 12 months



5.9  
Reported number  
of total staff







# Module 3: Recruitment experiences

## Recent recruitment

Of the 46% that did recruit...

|   |   |   |
|---|---|---|
| <p>Q21. Of the [Q19 ANSWER] staff you have recruited in the last 12 months, how many were new to the dairy industry?</p> <p>Base: All farmers who have recruited at least one staff member in the last 12 months, n = 220</p> | <p>% of recruited workforce</p> <p>2.1 52%</p>                    | <p>New to the dairy industry</p> <p>2020: 1.6</p>                               |
| -----   |   |   |
| <p>Q22. How many of the [Q19 ANSWER] workers recruited over the last 12 months were...</p> <p>Base: All farmers who have recruited at least one staff member in the last 12 months, n = 220</p>                               | <p>2.5 61%</p> <p>1.6 39%</p> <p>&lt;0.1 &lt;1%</p> <p>0.0 0%</p> | <p>Male</p> <p>Female</p> <p>Non-binary</p> <p>Not sure / prefer not to say</p> |

Q20. Of the [Q19 ANSWER] staff recruited, how many were...?  
 Base: All farmers who have recruited at least one staff member in the last 12 months, n = 220

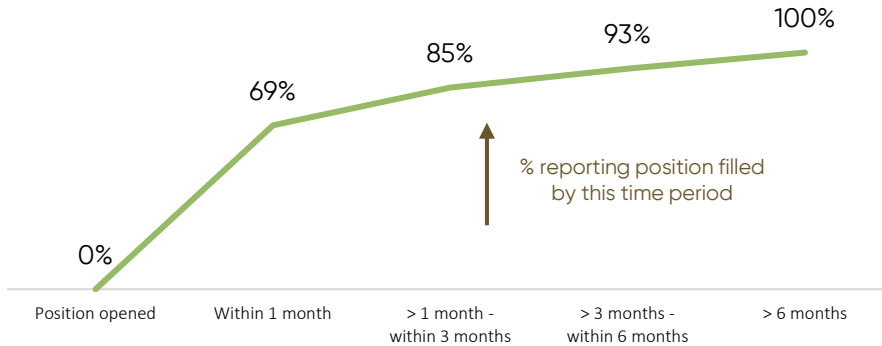
|   | % of recruited workforce |     |                              | 2020 |
|---|--------------------------|-----|------------------------------|------|
|  | 1.2                      | 30% | full-time permanent          | 1.1  |
|  | 0.3                      | 7%  | part-time permanent          | 0.4  |
|  | 2.5                      | 61% | casual                       | 1.3  |
|  | 0.1                      | 2%  | fixed-term contract          | 0.1  |
|   | <0.1                     | <1% | Not sure / prefer not to say | n/a  |

# Module 3: Recruitment experiences

## Recent recruitment

Q23. Thinking of the most recent position you recruited for, how long did it take you to fill this position?

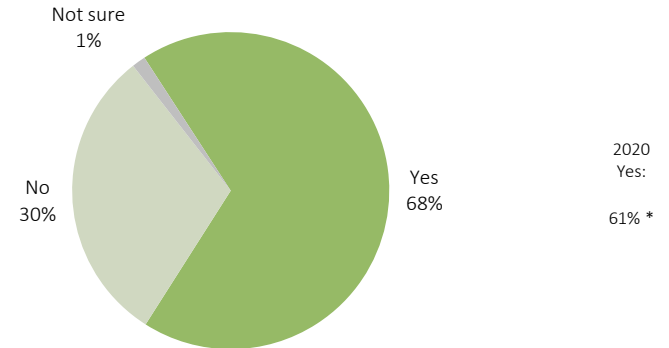
Base: All farmers who have recruited at least one staff member in the last 12 months, n = 220



9.6 weeks from job opening to position filled  
(averaged across all responses)

Q24. Had the successful applicant ever worked in the dairy industry before?

Base: All farmers who have recruited at least one staff member in the last 12 months, n = 220



|   | Herd Size    |                  |                 |                   | Workforce Size |            |            |           | Phase of Dairy Business |                             |                           |              |
|---|--------------|------------------|-----------------|-------------------|----------------|------------|------------|-----------|-------------------------|-----------------------------|---------------------------|--------------|
|   | Small (<150) | Medium (151-300) | Large (301-500) | X-XX Large (>501) | 1-2 people     | 3-4 people | 5-6 people | 7+ people | Expansion               | Steady – where I want to be | Steady – unable to expand | Winding down |
| Base (n =)  | 18           | 67               | 59              | 76                | 11             | 50         | 76         | 83        | 62                      | 93                          | 43                        | 22           |
| Time taken from job opening to position filled (in weeks) | 8.6          | 16.4             | 4.8             | 6.4               | 17.5           | 14.7       | 6.3        | 6.9       | 7.3                     | 6.4                         | 20.9                      | 4.5          |
| % applicant worked in dairy                               | 72%          | 75%              | 63%             | 63%               | 94%            | 67%        | 68%        | 62%       | 73%                     | 64%                         | 72%                       | 62%          |

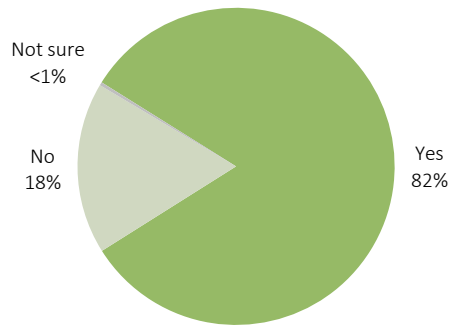
\* Please note that the question in 2020 referred to the applicant recruited to a permanent role over the last 12 months.

The following two pages refer to two groups of farmers: those who **have** recruited in the last 12 months (46%), and those who **have not** (54%).

Of those who **have** recruited in the last 12 months. . .

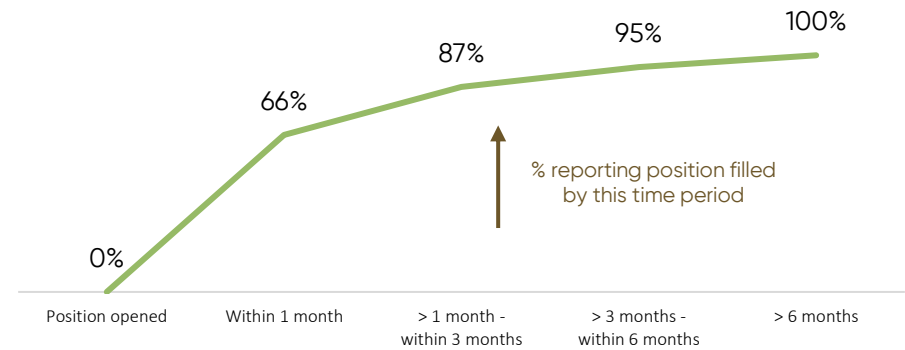
Q25. Other than the most recent position you recruited for, have you successfully recruited any other staff in the last 3 years?

Base: All farmers who have recruited at least one staff member in the last 12 months, n = 220



Q26. Other than the most recent position you answered for earlier, how long did it take you to fill this 2nd most recent position?

Base: All farmers who have recruited at two staff members in the last three years, n = 186



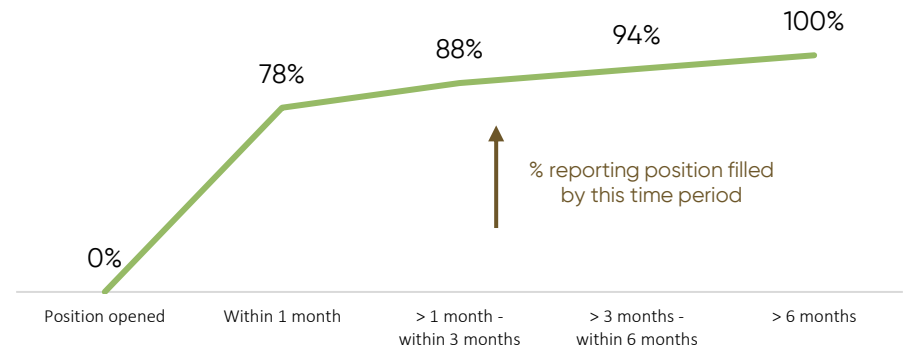
7.6 weeks from job opening to position filled (averaged across all responses)

Of those who **have not** recruited in the last 12 months. . .

Q25. Have you successfully recruited any staff in the last 3 years?  
Base: All farmers who have not recruited in the last 12 months, n = 180



Q26. Thinking of the most recent position you recruited for, how long did it take you to fill this position?  
Base: All farmers who have not recruited in the last 12 months BUT have recruited at least one staff member in the last three years, n = 75



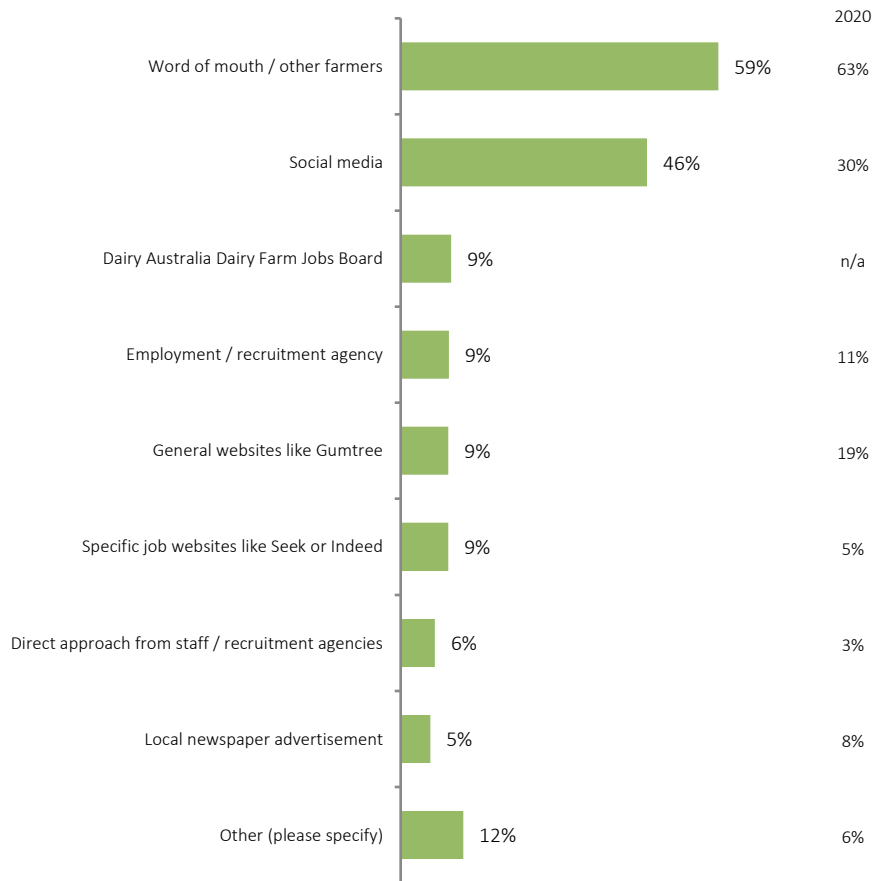
6.4 weeks from job opening to position filled  
(averaged across all responses)

## Module 3: Recruitment experiences

# Places used to recruit staff

Q27. Over the last 12 months, what places did you use to recruit new staff? Please select all that apply.

Base: All farmers who have recruited at least one staff member in the last 12 months, n = 220



1.6 average number of places used  
(averaged across all responses)

58% using one place only

29% using two places

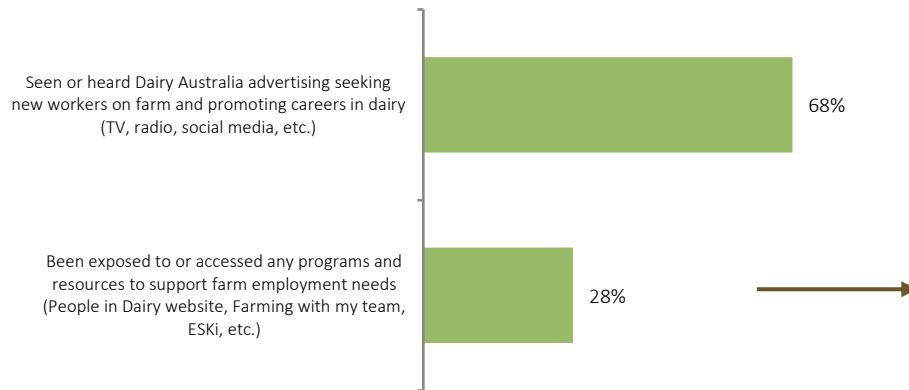
13% using three or more places

# Module 3: Recruitment experiences

## Use of DA resources

Q28. Over the last 12 months, have you...

Base: All farmers, n = 373 (question was added during fieldwork)



Q29. As a result of being exposed to or using the programs or resources, did you...

Base: All farmers who have been exposed to or accessed programs/resources, n = 121 (question was added during fieldwork)



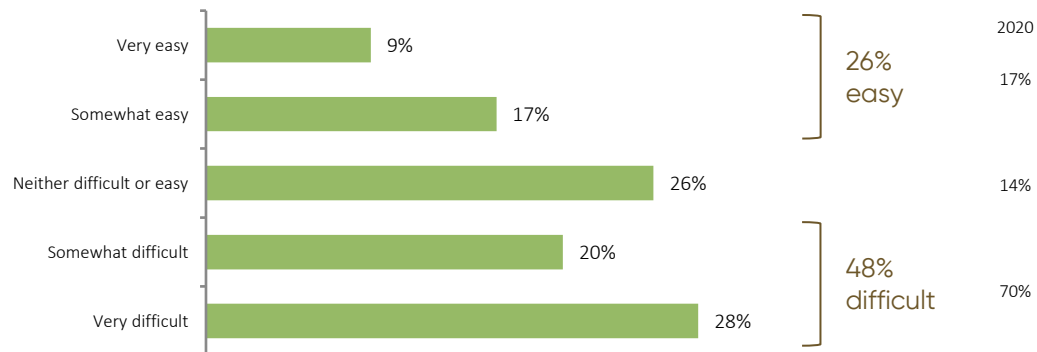
89% took some action as a result of being exposed to or using programs/resources

# Module 3: Recruitment experiences

## The experience of recruiting staff

Q30. In general, when you recruit new staff, how easy or difficult do you find it to fill the positions?

Base: All farmers, n = 400



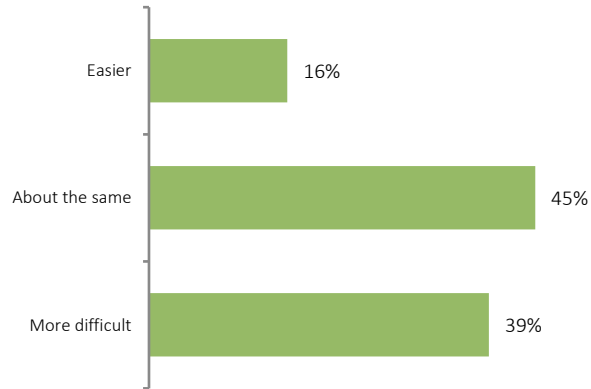
|             | Herd Size    |                  |                 |                   | Workforce Size |            |            |           | Phase of Dairy Business |                             |                           |              |
|-------------|--------------|------------------|-----------------|-------------------|----------------|------------|------------|-----------|-------------------------|-----------------------------|---------------------------|--------------|
|             | Small (<150) | Medium (151-300) | Large (301-500) | X-XX Large (>501) | 1-2 people     | 3-4 people | 5-6 people | 7+ people | Expansion               | Steady – where I want to be | Steady – unable to expand | Winding down |
| Base (n =)  | 79           | 133              | 92              | 96                | 60             | 124        | 113        | 103       | 94                      | 185                         | 67                        | 52           |
| % easy      | 17%          | 28%              | 33%             | 35%               | 19%            | 20%        | 33%        | 36%       | 34%                     | 29%                         | 19%                       | 14%          |
| % neither   | 38%          | 25%              | 16%             | 10%               | 43%            | 26%        | 19%        | 11%       | 20%                     | 27%                         | 16%                       | 40%          |
| % difficult | 45%          | 47%              | 51%             | 55%               | 38%            | 55%        | 48%        | 53%       | 46%                     | 45%                         | 64%                       | 46%          |

# Module 3: Recruitment experiences

## The experience of recruiting staff

Q31. Compared to 3 years ago, would you say it is now more difficult or easier to recruit new staff?

Base: All farmers, n = 400



Comparison of 3 years ago to now by current ease of recruitment

Q31. Compared to 3 years ago, would you say it is now more difficult or easier to recruit new staff?

Q30. In general, when you recruit new staff, how easy or difficult do you find it to fill the positions?

|                    | Easy (n = 113) | Neither (n = 87) | Difficult (n = 200) |
|--------------------|----------------|------------------|---------------------|
| Easier now         | 33%            | 8%               | 11%                 |
| About the same     | 44%            | 68%              | 33%                 |
| More difficult now | 23%            | 24%              | 56%                 |

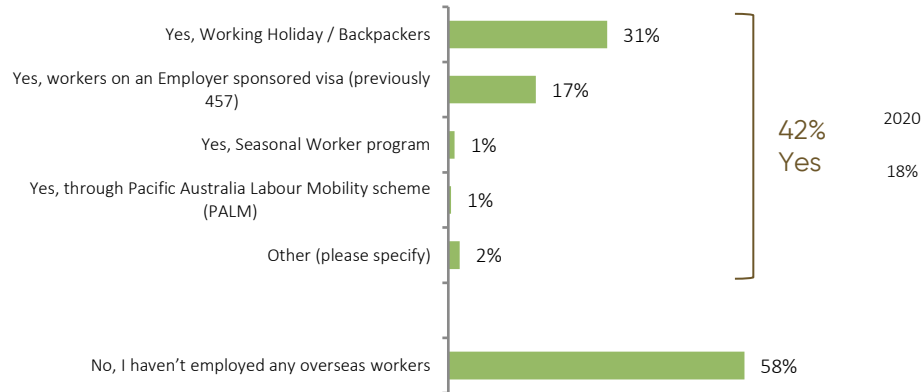


# Module 3: Recruitment experiences

## Use of overseas workers

Q32. In the last 12 months, have you employed any overseas workers on your farm? Please select all that apply.

Base: All farmers who have recruited at least one staff member in the last 12 months, n = 220

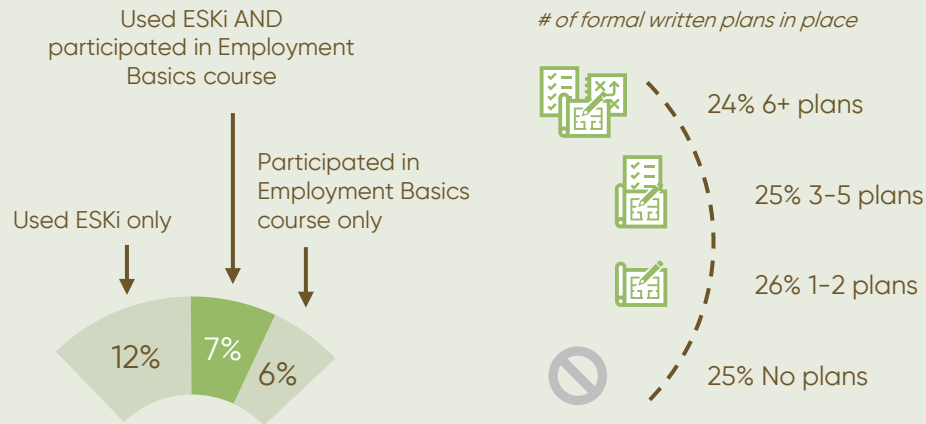


|            | Herd Size    |                  |                 |                   | Workforce Size |            |            |           | Phase of Dairy Business |                             |                           |              |
|------------|--------------|------------------|-----------------|-------------------|----------------|------------|------------|-----------|-------------------------|-----------------------------|---------------------------|--------------|
|            | Small (<150) | Medium (151-300) | Large (301-500) | X-XX Large (>501) | 1-2 people     | 3-4 people | 5-6 people | 7+ people | Expansion               | Steady – where I want to be | Steady – unable to expand | Winding down |
| Base (n =) | 18           | 67               | 59              | 76                | 11             | 50         | 76         | 83        | 62                      | 93                          | 43                        | 22           |
| % yes      | 11%          | 17%              | 50%             | 83%               | 6%             | 23%        | 44%        | 63%       | 53%                     | 45%                         | 28%                       | 30%          |

**Farmer feedback:**  
*Recruitment and people  
management practices*



----- *What recruitment practices have they used?* -----

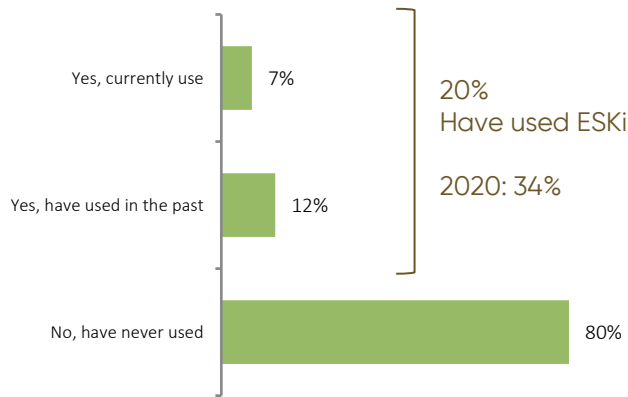


----- *What's in place to help keep / retain their employees?* -----



Q33. Do you use or have you ever used Dairy Australia’s Employment Starter Kit (ESKi) to support your employment practices?

Base: All farmers, n = 400



Q34. Has the ESKi improved your recruitment and employment practices?

Base: All farmers who have used ESKi (currently or in the past), n = 102



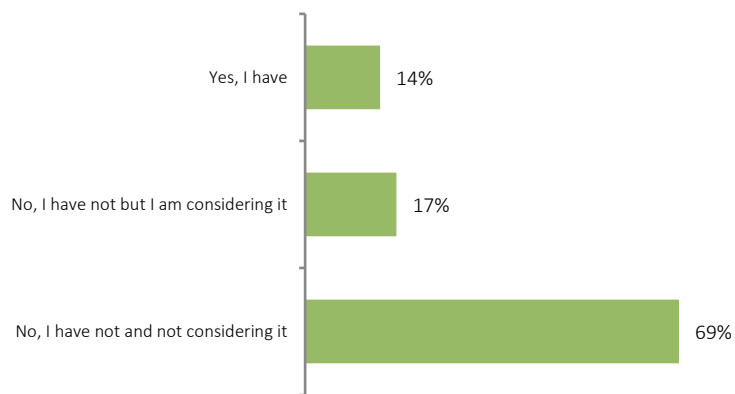
|                                       | Herd Size    |                  |                 |                   | Workforce Size |            |            |           | Phase of Dairy Business |                             |                           |              |
|---------------------------------------|--------------|------------------|-----------------|-------------------|----------------|------------|------------|-----------|-------------------------|-----------------------------|---------------------------|--------------|
|                                       | Small (<150) | Medium (151-300) | Large (301-500) | X-XX Large (>501) | 1-2 people     | 3-4 people | 5-6 people | 7+ people | Expansion               | Steady – where I want to be | Steady – unable to expand | Winding down |
| Base (n =)                            | 79           | 133              | 92              | 96                | 60             | 124        | 113        | 103       | 94                      | 185                         | 67                        | 52           |
| % have used ESKi                      | 8%           | 18%              | 26%             | 41%               | 3%             | 17%        | 26%        | 37%       | 19%                     | 21%                         | 24%                       | 10%          |
| % ESKi improved recruitment practices | 64%          | 81%              | 74%             | 80%               | 100%           | 74%        | 74%        | 78%       | 80%                     | 74%                         | 85%                       | 58%          |

# Module 4: Recruitment and people management practices

## Employment Basics course

Q35. Have you ever participated in an Employment Basics course run by Dairy Australia through [REGION]?

Base: All farmers, n = 400

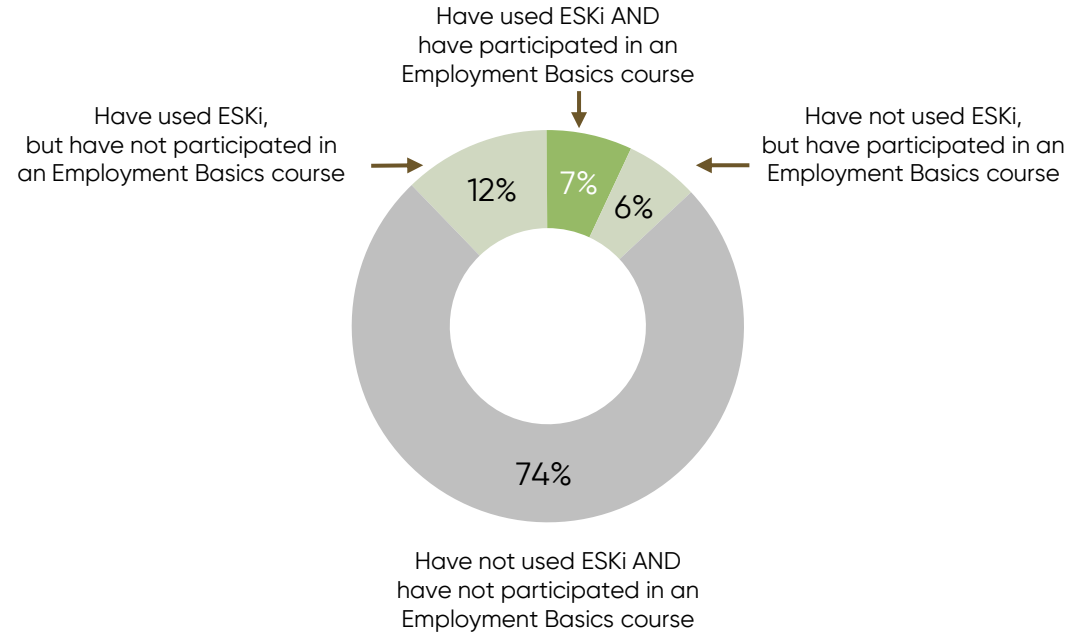


% yes by Region

|                            |     |
|----------------------------|-----|
| DairyNSW (n = 31)          | 22% |
| DairySA (n = 29)           | 10% |
| DairyTAS (n = 42)          | 13% |
| GippsDairy (n = 78)        | 13% |
| Murray Dairy (n = 81)      | 20% |
| Subtropical Dairy (n = 30) | 12% |
| Western Dairy (n = 31)     | 19% |
| WestVic Dairy (n = 78)     | 8%  |

|                            | Herd Size    |                  |                 |                   | Workforce Size |            |            |           | Phase of Dairy Business |                             |                           |              |
|----------------------------|--------------|------------------|-----------------|-------------------|----------------|------------|------------|-----------|-------------------------|-----------------------------|---------------------------|--------------|
|                            | Small (<150) | Medium (151-300) | Large (301-500) | X-XX Large (>501) | 1-2 people     | 3-4 people | 5-6 people | 7+ people | Expansion               | Steady – where I want to be | Steady – unable to expand | Winding down |
| Base (n = )                | 79           | 133              | 92              | 96                | 60             | 124        | 113        | 103       | 94                      | 185                         | 67                        | 52           |
| Yes, I have                | 6%           | 8%               | 22%             | 32%               | 4%             | 11%        | 15%        | 30%       | 18%                     | 16%                         | 13%                       | 5%           |
| No, but considering it     | 12%          | 21%              | 20%             | 16%               | 7%             | 20%        | 22%        | 19%       | 21%                     | 14%                         | 26%                       | 12%          |
| No, and not considering it | 81%          | 70%              | 58%             | 52%               | 89%            | 69%        | 63%        | 51%       | 61%                     | 71%                         | 61%                       | 82%          |

While there is some use of the available resources (that is ESKi and the Employment Basics course), there remains significant upside opportunity to grow utilisation of these resources.



|   | Herd Size    |                  |                 |                   | Workforce Size |            |            |           | Phase of Dairy Business |                             |                           |              |
|---|--------------|------------------|-----------------|-------------------|----------------|------------|------------|-----------|-------------------------|-----------------------------|---------------------------|--------------|
|   | Small (<150) | Medium (151-300) | Large (301-500) | X-XX Large (>501) | 1-2 people     | 3-4 people | 5-6 people | 7+ people | Expansion               | Steady – where I want to be | Steady – unable to expand | Winding down |
| <i>Base (n =)</i>   | 79           | 133              | 92              | 96                | 60             | 124        | 113        | 103       | 94                      | 185                         | 67                        | 52           |
| Have used ESKi AND have participated in an Employment Basics course         | 4%           | 3%               | 10%             | 21%               | 2%             | 4%         | 7%         | 20%       | 9%                      | 9%                          | 7%                        | 2%           |
| Have used ESKi, but have not participated in an Employment Basics course    | 4%           | 15%              | 16%             | 19%               | 1%             | 13%        | 19%        | 17%       | 10%                     | 12%                         | 16%                       | 9%           |
| Have not used ESKi, but have participated in an Employment Basics course    | 3%           | 5%               | 12%             | 11%               | 2%             | 7%         | 8%         | 10%       | 9%                      | 6%                          | 5%                        | 4%           |
| Have not used ESKi AND have not participated in an Employment Basics course | 89%          | 76%              | 62%             | 48%               | 95%            | 76%        | 66%        | 53%       | 71%                     | 72%                         | 71%                       | 86%          |

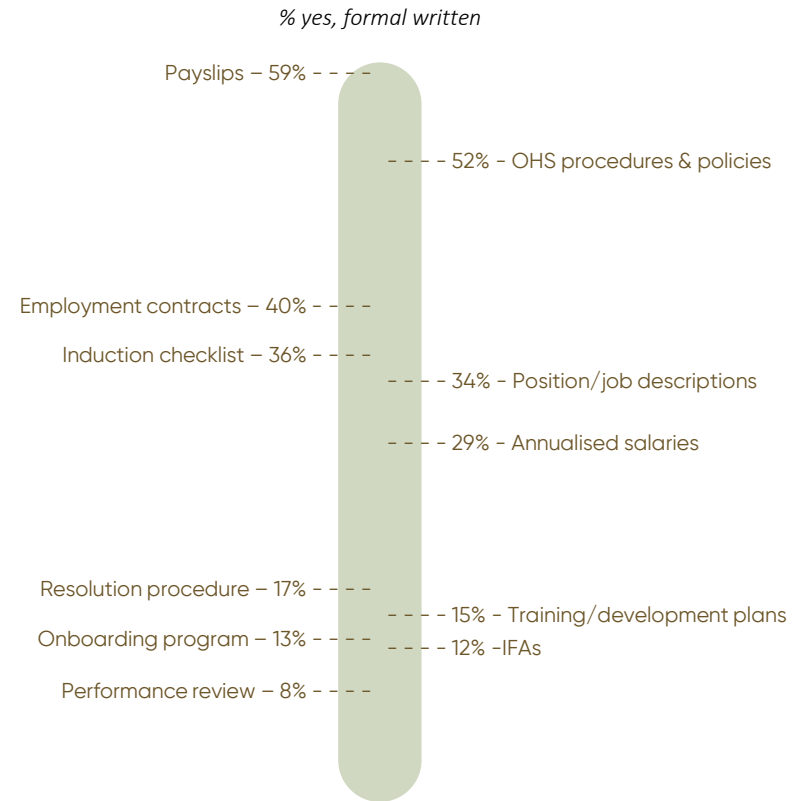
# Module 4: Recruitment and people management practices

## People management practices

Q36. Do you have the following in place for your employees and your family on the farm?

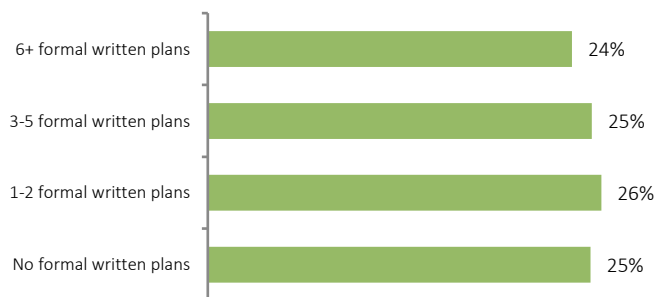
Base: All farmers, n = 400

|   | Yes, formal written one | Yes, an informal one | No  | N/A | 2020 % yes, formal |
|---|-------------------------|----------------------|-----|-----|--------------------|
| Payslips  | 59%                     | 4%                   | 23% | 14% | 63%                |
| OHS procedures and policies   | 52%                     | 27%                  | 15% | 6%  | 59%                |
| Employment contracts (as per the Pastoral Award)  | 40%                     | 8%                   | 34% | 18% | 35%                |
| An induction checklist for new employees (process / structure to bring people into your business) within first week of employment | 36%                     | 17%                  | 25% | 21% | n/a                |
| Position/job descriptions   | 34%                     | 21%                  | 28% | 17% | 39%                |
| Annualised salaries   | 29%                     | 13%                  | 44% | 14% | 25%                |
| A documented grievance/complaints resolution procedure  | 17%                     | 14%                  | 51% | 18% | n/a                |
| Training and development plans  | 15%                     | 28%                  | 39% | 18% | 20%                |
| An onboarding program for new employees covering their first 3-6 months of employment   | 13%                     | 15%                  | 48% | 24% | 18%                |
| Independent Flexibility Agreements (IFAs)   | 12%                     | 19%                  | 51% | 18% | 14%                |
| Performance review/appraisal  | 8%                      | 22%                  | 50% | 20% | 13%                |



Number of formal written plans in place for their employees and their family on-farm?

Base: All farmers, n = 400



|                          | Herd Size    |                  |                 |                   | Workforce Size |            |            |           | Phase of Dairy Business |                             |                           |              |
|--------------------------|--------------|------------------|-----------------|-------------------|----------------|------------|------------|-----------|-------------------------|-----------------------------|---------------------------|--------------|
|                          | Small (<150) | Medium (151-300) | Large (301-500) | X-XX Large (>501) | 1-2 people     | 3-4 people | 5-6 people | 7+ people | Expansion               | Steady – where I want to be | Steady – unable to expand | Winding down |
| <i>Base (n = )</i>       | 79           | 133              | 92              | 96                | 60             | 124        | 113        | 103       | 94                      | 185                         | 67                        | 52           |
| 6+ formal written plans  | 6%           | 17%              | 35%             | 65%               | 2%             | 14%        | 31%        | 59%       | 36%                     | 26%                         | 22%                       | 7%           |
| 3-5 formal written plans | 15%          | 31%              | 38%             | 24%               | 15%            | 22%        | 37%        | 30%       | 35%                     | 26%                         | 19%                       | 17%          |
| 1-2 formal written plans | 32%          | 31%              | 20%             | 8%                | 26%            | 40%        | 20%        | 10%       | 16%                     | 23%                         | 42%                       | 30%          |
| No formal written plans  | 46%          | 21%              | 7%              | 4%                | 57%            | 24%        | 11%        | 1%        | 13%                     | 25%                         | 18%                       | 46%          |

|                          | Use of ESKI        |                            |                     | Participation in Employment Basics Course |                        |                            |
|--------------------------|--------------------|----------------------------|---------------------|---|------------------------|----------------------------|
|                          | Yes, currently use | Yes, have used in the past | No, have never used | Yes, I have                               | No, but considering it | No, and am not considering |
| <i>Base (n = )</i>       | 39                 | 63                         | 298                 | 70  | 70                     | 260                        |
| 6+ formal written plans  | 64%                | 43%                        | 17%                 | 52%                                       | 33%                    | 16%                        |
| 3-5 formal written plans | 30%                | 41%                        | 22%                 | 25%                                       | 33%                    | 23%                        |
| 1-2 formal written plans | 2%                 | 10%                        | 30%                 | 13%                                       | 24%                    | 29%                        |
| No formal written plans  | 4%                 | 6%                         | 30%                 | 11%                                       | 10%                    | 31%                        |

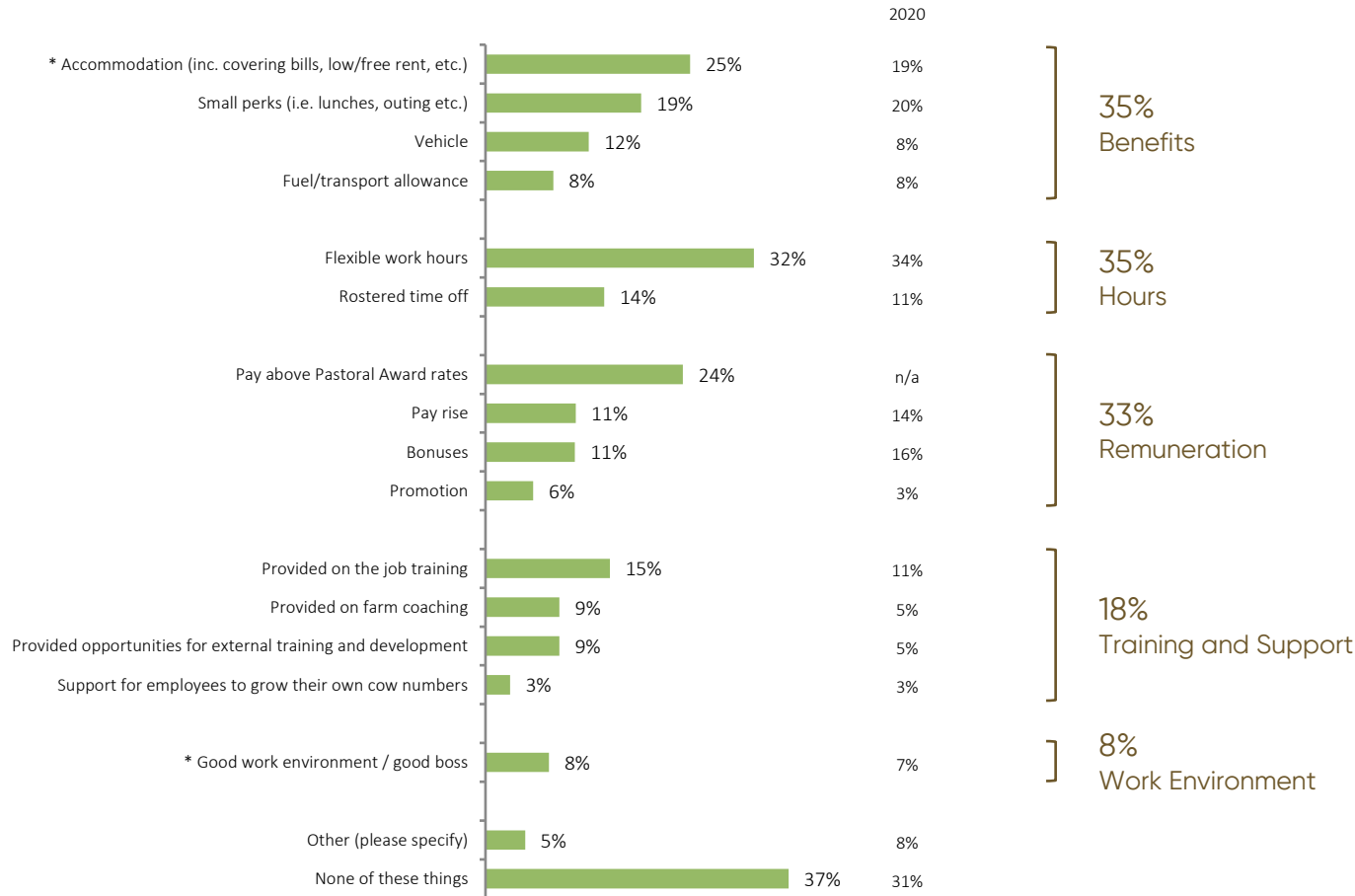


# Module 4: Recruitment and people management practices

## Recruitment levers

Q37. What have you done or put in place to help keep or retain your employees? Please tell us all the initiatives or benefits that you use.

Base: All farmers, n = 400



\* Coded from "Other (please specify)" answers.

Q37. What have you done or put in place to help keep or retain your employees? Please tell us all the initiatives or benefits that you use.

Base: All farmers, n = 400

|                      | Herd Size    |                  |                 |                   | Workforce Size |            |            |           | Phase of Dairy Business |                             |                           |              |
|----------------------|--------------|------------------|-----------------|-------------------|----------------|------------|------------|-----------|-------------------------|-----------------------------|---------------------------|--------------|
|                      | Small (<150) | Medium (151-300) | Large (301-500) | X-XX Large (>501) | 1-2 people     | 3-4 people | 5-6 people | 7+ people | Expansion               | Steady – where I want to be | Steady – unable to expand | Winding down |
| <i>Base (n =)</i>    | 79           | 133              | 92              | 96                | 60             | 124        | 113        | 103       | 94                      | 185                         | 67                        | 52           |
| Benefits             | 15%          | 36%              | 43%             | 66%               | 6%             | 33%        | 46%        | 62%       | 46%                     | 34%                         | 30%                       | 28%          |
| Hours                | 18%          | 45%              | 40%             | 45%               | 16%            | 32%        | 45%        | 51%       | 35%                     | 39%                         | 29%                       | 30%          |
| Remuneration         | 14%          | 33%              | 48%             | 58%               | 15%            | 23%        | 46%        | 56%       | 42%                     | 31%                         | 39%                       | 21%          |
| Training and Support | 9%           | 24%              | 19%             | 29%               | 12%            | 14%        | 23%        | 29%       | 20%                     | 17%                         | 16%                       | 24%          |
| Work Environment     | 3%           | 5%               | 17%             | 13%               | <1%            | 8%         | 10%        | 14%       | 8%                      | 11%                         | 6%                        | 1%           |
| None of these things | 64%          | 32%              | 17%             | 5%                | 71%            | 40%        | 17%        | 10%       | 20%                     | 39%                         | 34%                       | 54%          |

**Farmer feedback:**  
*Recruitment plans for the  
next 12 months*

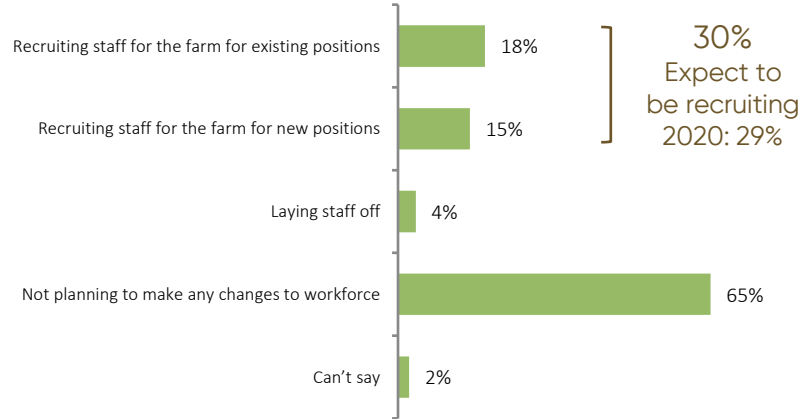


# Module 5: Recruitment plans for the next 12 months

## Intentions for future recruitment

Q38. Looking ahead now to the next 12 months, do you expect to be...

Base: All farmers, n = 400



Results across Segments

|                   | Herd Size    |                  |                 |                   |
|-------------------|--------------|------------------|-----------------|-------------------|
|                   | Small (<150) | Medium (151-300) | Large (301-500) | X-XX Large (>501) |
| <i>Base (n =)</i> | 79           | 133              | 92              | 96                |
| Expect to recruit | 10%          | 28%              | 43%             | 63%               |
| Laying staff off  | 1%           | 7%               | 2%              | 5%                |
| No change planned | 84%          | 67%              | 55%             | 32%               |

|                   | Workforce Size |            |            |           |
|-------------------|----------------|------------|------------|-----------|
|                   | 1-2 people     | 3-4 people | 5-6 people | 7+ people |
| <i>Base (n =)</i> | 60             | 124        | 113        | 103       |
| Expect to recruit | 6%             | 21%        | 40%        | 62%       |
| Laying staff off  | 0%             | 5%         | 6%         | 4%        |
| No change planned | 92%            | 73%        | 51%        | 35%       |

|                   | Phase of Dairy Business |                             |                           |              |
|-------------------|-------------------------|-----------------------------|---------------------------|--------------|
|                   | Expansion               | Steady – where I want to be | Steady – unable to expand | Winding down |
| <i>Base (n =)</i> | 94                      | 185                         | 67                        | 52           |
| Expect to recruit | 44%                     | 30%                         | 36%                       | 5%           |
| Laying staff off  | 2%                      | 3%                          | 3%                        | 9%           |
| No change planned | 52%                     | 69%                         | 52%                       | 86%          |

Analysis suggests there is a core group of farmers who have recruited in the last 12 months and intend to recruit in the upcoming 12 months.

- 21% Recruited in the last 12 months AND intend to recruit in the next 12 months
- 25% Recruited in the last 12 months, but do not intend to recruit in the next 12 months
- 8% Did not recruit in the last 12 months, but intend to recruit in the next 12 months
- 46% Did not recruit in the last 12 months AND do not intend to recruit in the next 12 months

|                                     | Herd Size    |                  |                 |                   | Workforce Size |            |            |           | Phase of Dairy Business |                             |                           |              |
|-------------------------------------|--------------|------------------|-----------------|-------------------|----------------|------------|------------|-----------|-------------------------|-----------------------------|---------------------------|--------------|
|                                     | Small (<150) | Medium (151-300) | Large (301-500) | X-XX Large (>501) | 1-2 people     | 3-4 people | 5-6 people | 7+ people | Expansion               | Steady – where I want to be | Steady – unable to expand | Winding down |
| <i>Base (n =)</i>                   | 79           | 133              | 92              | 96                | 60             | 124        | 113        | 103       | 94                      | 185                         | 67                        | 52           |
| Recruited AND intend to             | 4%           | 18%              | 33%             | 55%               | 1%             | 8%         | 33%        | 55%       | 34%                     | 20%                         | 28%                       | 5%           |
| Recruited but don't intend to       | 18%          | 30%              | 31%             | 23%               | 14%            | 30%        | 30%        | 23%       | 28%                     | 21%                         | 31%                       | 23%          |
| Did not recruit, but intend to      | 6%           | 10%              | 9%              | 9%                | 5%             | 13%        | 7%         | 7%        | 11%                     | 10%                         | 8%                        | 0%           |
| Did not recruit AND don't intend to | 72%          | 42%              | 27%             | 13%               | 80%            | 49%        | 30%        | 14%       | 28%                     | 49%                         | 33%                       | 72%          |

|                                     | Use of ESKI        |                            |                     | Participation in Employment Basics Course |                        |                            |
|-------------------------------------|--------------------|----------------------------|---------------------|---|------------------------|----------------------------|
|                                     | Yes, currently use | Yes, have used in the past | No, have never used | Yes, I have                               | No, but considering it | No, and am not considering |
| <i>Base (n =)</i>                   | 39                 | 63                         | 298                 | 70  | 70                     | 260                        |
| Recruited AND intend to             | 51%                | 32%                        | 17%                 | 43%                                       | 23%                    | 17%                        |
| Recruited but don't intend to       | 27%                | 31%                        | 23%                 | 24%                                       | 33%                    | 23%                        |
| Did not recruit, but intend to      | 12%                | 8%                         | 8%                  | 7%  | 15%                    | 7%                         |
| Did not recruit AND don't intend to | 9%                 | 29%                        | 51%                 | 26%                                       | 29%                    | 54%                        |

# Module 5: Recruitment plans for the next 12 months

## Recruiting for new positions

Of the 15% of dairy farmers who said they were likely to recruit for **new** positions in the next 12 months. . .

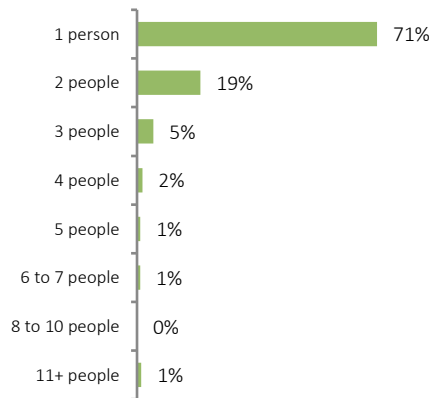
Of the 30% of dairy farmers who said they were likely to recruit in the next 12 months. . .

Q38. How many new positions are you likely to recruit for?

Base: All farmers who expect to be recruiting staff for new positions in the next 12 months (and who provided a valid answer to the question), n = 66

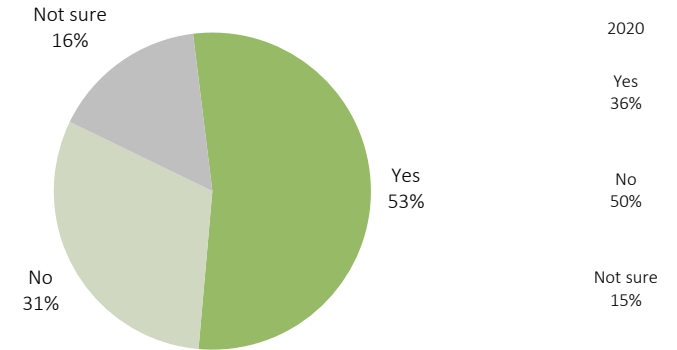
1.9 people  
in new positions  
(total number of people  
in new positions,  
averaged across all responses)

2020: 1.6



Q39. As part of your recruiting for new staff, do you anticipate recruiting any overseas workers?

Base: All farmers who expect to be recruiting staff for the farm, n = 143



**Farmer feedback:**  
*Loss of permanent staff  
over the last 12 months*



# Module 6: Loss of permanent staff over the last 12 months

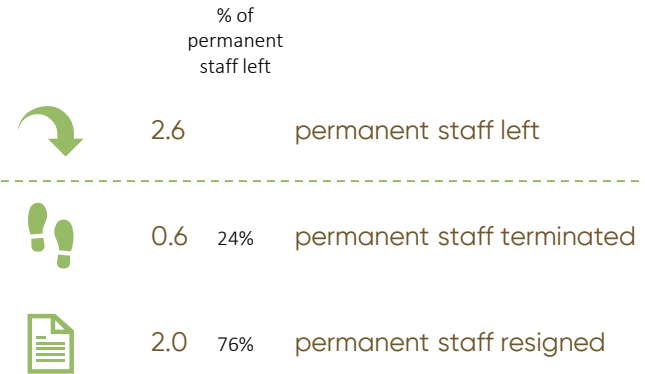
## Staff churn

Q40. In the last 12 months, how many of your PERMANENT staff left either because they have been terminated or resigned?

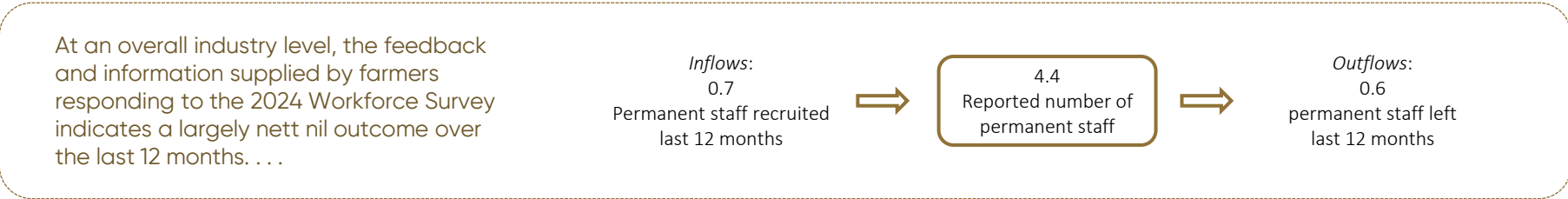
Base: All farmers, n = 400

78% of farmers did not have any permanent staff leave over the last 12 months.

Of the 22% that did have staff leave... (2020: 40%\*)



|  | Herd Size    |                  |                 |                   | Workforce Size |            |            |           | Phase of Dairy Business |                             |                           |              |
|--|--------------|------------------|-----------------|-------------------|----------------|------------|------------|-----------|-------------------------|-----------------------------|---------------------------|--------------|
|  | Small (<150) | Medium (151-300) | Large (301-500) | X-XX Large (>501) | 1-2 people     | 3-4 people | 5-6 people | 7+ people | Expansion               | Steady – where I want to be | Steady – unable to expand | Winding down |
| Base (n =)                               | 79           | 133              | 92              | 96                | 60             | 124        | 113        | 103       | 94                      | 185                         | 67                        | 52           |
| % had at least one permanent staff leave | 5%           | 17%              | 43%             | 47%               | 3%             | 17%        | 29%        | 46%       | 29%                     | 20%                         | 28%                       | 10%          |
| Total # permanent staff left             | 2.2          | 1.3              | 2.0             | 4.2               | 1.0            | 1.7        | 1.6        | 4.0       | 4.7                     | 1.9                         | 1.9                       | 1.4          |



\* Please note that the question in 2020 referred to **all staff**, not just permanent staff.

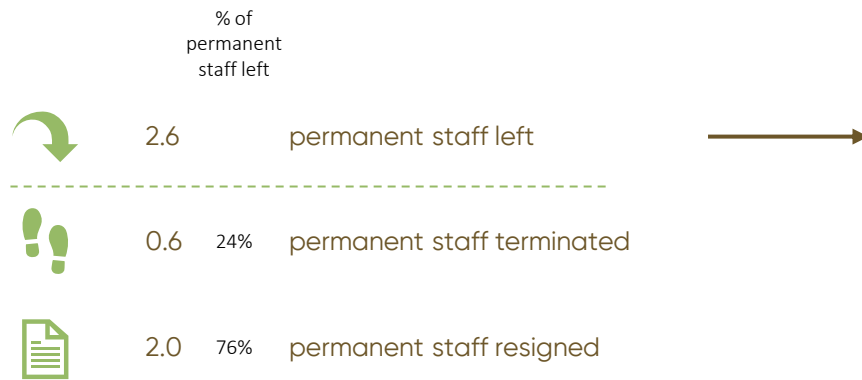


# Module 6: Loss of staff over the last 12 months

## Staff churn

78% of farmers did not have any permanent staff leave over the last 12 months.

Of the 22% that did have staff leave...



Q41. How long had these [Q40 ANSWER] PERMANENT staff members worked for you for?  
 Base: All farmers who have had permanent staff left in the last 12 months, n = 110

| Count | % of permanent staff left | Duration                     |
|-------|---------------------------|------------------------------|
| 1.3   | 51%                       | 6 months or less             |
| 0.5   | 20%                       | Between 6 months and 1 year  |
| 0.4   | 16%                       | Between 1 and 3 years        |
| 0.2   | 7%                        | Between 3 and 5 years        |
| 0.0   | 1%                        | Between 5 and 7 years        |
| 0.1   | 3%                        | Between 7 and 10 years       |
| 0.0   | 1%                        | More than 10 years           |
| 0.0   | 0%                        | Not sure / prefer not to say |

Q43. Of the [Q40 ANSWER] PERMANENT staff that have resigned or been terminated, how many...?  
 Base: All farmers who have had permanent staff left in the last 12 months, n = 110

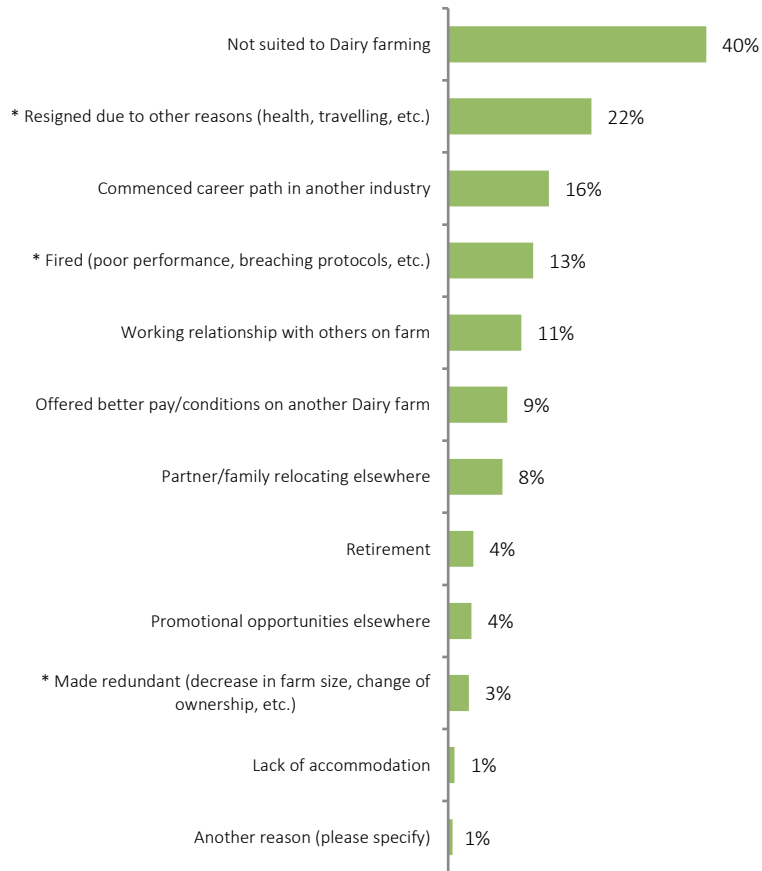
| Count | % of permanent staff left | Reason                       |
|-------|---------------------------|------------------------------|
| 1.0   | 37%                       | Went to another dairy job    |
| 0.6   | 22%                       | Went to another industry     |
| 0.1   | 3%                        | Retired                      |
| 0.7   | 27%                       | Other reasons                |
| 0.3   | 11%                       | Not sure / prefer not to say |

## Module 6: Loss of staff over the last 12 months

# Staff churn

Q42. What were the main reasons for the PERMANENT employee(s) leaving your employment in the past 12 months?

Base: All farmers who have had permanent staff left in the last 12 months, n = 110



\* Coded from "Another reason (please specify)" answers.

**Farmer feedback:**  
*Farm safety*

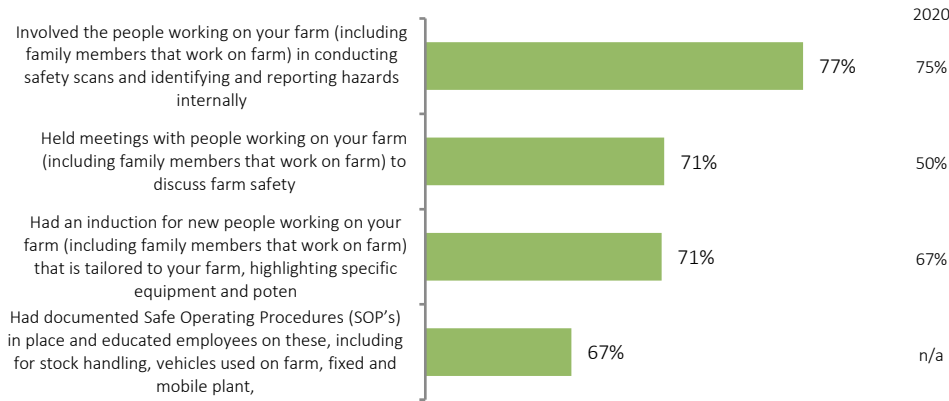


# Module 7: Farm safety

## Farm safety practices

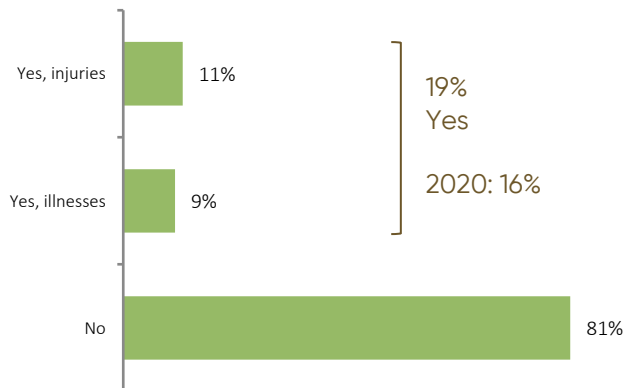
Q44. Which of these work health and safety practices do you undertake on your farm?

Base: All farmers, n = 400



Q47. Over the last 12 months, have you or any of your staff had a work-related injury on the farm or any illnesses that have required them to take time off work?

Base: All farmers, n = 400



90% undertake at least one WH&S practice on-farm

(2020: 85%, one of three listed practices)

48% undertake all four WH&S practices on-farm

Results across Segments

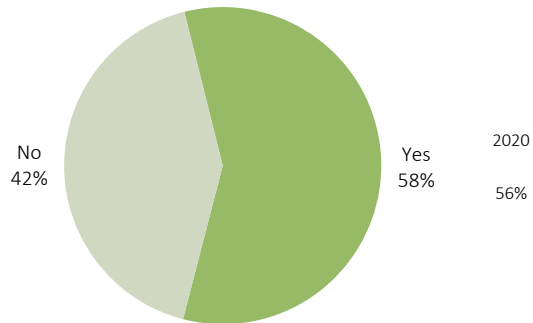
|                                 | Herd Size    |                  |                 |                   |
|---------------------------------|--------------|------------------|-----------------|-------------------|
|                                 | Small (<150) | Medium (151-300) | Large (301-500) | X-XX Large (>501) |
| Base (n =)                      | 79           | 133              | 92              | 96                |
| Undertake at least one practice | 84%          | 88%              | 95%             | 100%              |
| Injury / illness                | 12%          | 20%              | 14%             | 35%               |

|                                 | Workforce Size |            |            |           |
|---------------------------------|----------------|------------|------------|-----------|
|                                 | 1-2 people     | 3-4 people | 5-6 people | 7+ people |
| Base (n =)                      | 60             | 124        | 113        | 103       |
| Undertake at least one practice | 77%            | 90%        | 94%        | 100%      |
| Injury / illness                | 13%            | 11%        | 21%        | 34%       |

|                                 | Phase of Dairy Business |                             |                           |              |
|---------------------------------|-------------------------|-----------------------------|---------------------------|--------------|
|                                 | Expansion               | Steady – where I want to be | Steady – unable to expand | Winding down |
| Base (n =)                      | 94                      | 185                         | 67                        | 52           |
| Undertake at least one practice | 97%                     | 89%                         | 96%                       | 74%          |
| Injury / illness                | 27%                     | 16%                         | 16%                       | 17%          |

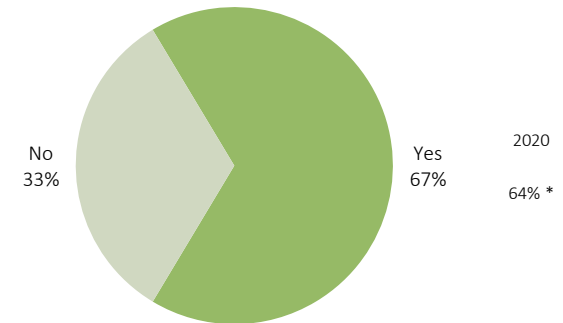
Q45. Do you have a written Work Health and Safety plan for your farm?

Base: All farmers, n = 400



Q46. Have you updated your Work Health and Safety Plan in the last 2 years?

Base: All farmers who have a written Work Health and Safety plan for their farm, n = 236

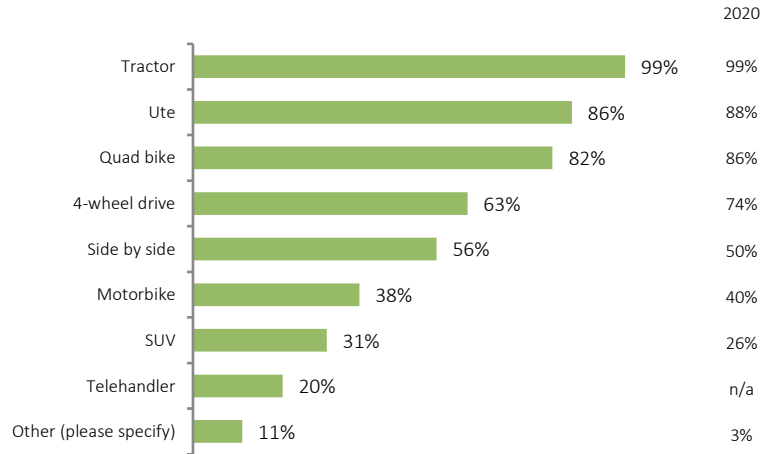


|  | Herd Size    |                  |                 |                   | Workforce Size |            |            |           | Phase of Dairy Business |                             |                           |              |
|--|--------------|------------------|-----------------|-------------------|----------------|------------|------------|-----------|-------------------------|-----------------------------|---------------------------|--------------|
|  | Small (<150) | Medium (151-300) | Large (301-500) | X-XX Large (>501) | 1-2 people     | 3-4 people | 5-6 people | 7+ people | Expansion               | Steady – where I want to be | Steady – unable to expand | Winding down |
| <i>Base (n = )</i>                             | 79           | 133              | 92              | 96                | 60             | 124        | 113        | 103       | 94                      | 185                         | 67                        | 52           |
| % yes, have a written WHS plan                 | 52%          | 56%              | 58%             | 75%               | 58%            | 45%        | 60%        | 75%       | 67%                     | 59%                         | 59%                       | 44%          |
| <i>Of those who have a written WHS plan...</i> |              |                  |                 |                   |                |            |            |           |                         |                             |                           |              |
| % have updated in the last 2 years             | 61%          | 76%              | 64%             | 68%               | 70%            | 61%        | 76%        | 62%       | 67%                     | 72%                         | 57%                       | 62%          |

\* Please note that the question in 2020 referred to updating their plan in the last 12 months.

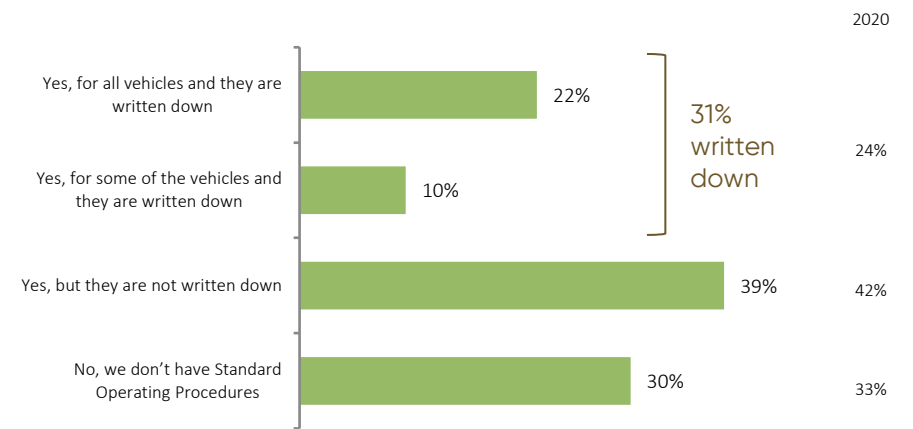
Q48. Which of these types of vehicles do you or any of your staff use on your farm?

Base: All farmers, n = 400



Q49. For the vehicles you and your staff use on you farm - do you have Standard Operating Procedures for each of the vehicles used on farm?

Base: All farmers, n = 400



|                                   | Herd Size    |                  |                 |                   | Workforce Size |            |            |           | Phase of Dairy Business |                             |                           |              |
|-----------------------------------|--------------|------------------|-----------------|-------------------|----------------|------------|------------|-----------|-------------------------|-----------------------------|---------------------------|--------------|
|                                   | Small (<150) | Medium (151-300) | Large (301-500) | X-XX Large (>501) | 1-2 people     | 3-4 people | 5-6 people | 7+ people | Expansion               | Steady – where I want to be | Steady – unable to expand | Winding down |
| Base (n = )                       | 79           | 133              | 92              | 96                | 60             | 124        | 113        | 103       | 94                      | 185                         | 67                        | 52           |
| % yes, at least some written down | 17%          | 28%              | 41%             | 58%               | 18%            | 25%        | 40%        | 49%       | 48%                     | 34%                         | 18%                       | 16%          |
| % yes, but not written down       | 49%          | 40%              | 32%             | 19%               | 41%            | 47%        | 36%        | 26%       | 30%                     | 32%                         | 54%                       | 52%          |
| % no                              | 34%          | 32%              | 27%             | 22%               | 42%            | 28%        | 25%        | 25%       | 22%                     | 34%                         | 28%                       | 32%          |

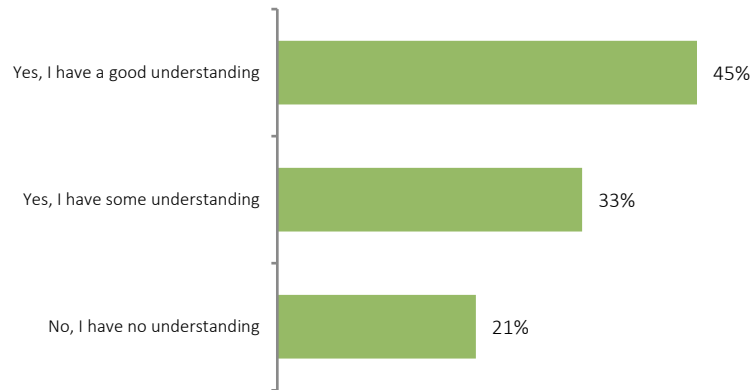
**Farmer feedback:**  
*Human Rights Legislation*



The Australian Government legislation requires large scale businesses to provide an annual report outlining any Human Rights risks in their supply chain and what is being done to manage these. These include risks such as worker exploitation or underpayment.

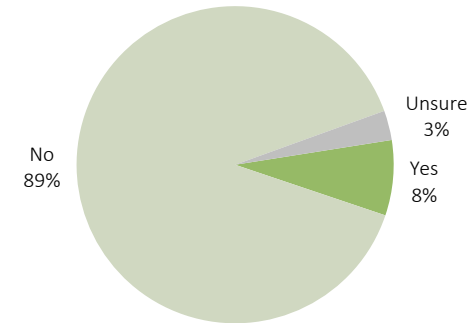
Q50. As an employer, do you understand your responsibilities and obligations under this legislation?

Base: All farmers, n = 400



Q51. Have you ever been asked if you are aware of any potential Human Rights risks in your supply chain?

Base: All farmers, n = 400



|                      | Herd Size    |                  |                 |                   | Workforce Size |            |            |           | Phase of Dairy Business |                             |                           |              |
|----------------------|--------------|------------------|-----------------|-------------------|----------------|------------|------------|-----------|-------------------------|-----------------------------|---------------------------|--------------|
|                      | Small (<150) | Medium (151-300) | Large (301-500) | X-XX Large (>501) | 1-2 people     | 3-4 people | 5-6 people | 7+ people | Expansion               | Steady – where I want to be | Steady – unable to expand | Winding down |
| Base (n =)           | 79           | 133              | 92              | 96                | 60             | 124        | 113        | 103       | 94                      | 185                         | 67                        | 52           |
| % good understanding | 42%          | 46%              | 44%             | 53%               | 25%            | 50%        | 58%        | 49%       | 55%                     | 44%                         | 41%                       | 39%          |
| % some understanding | 30%          | 35%              | 40%             | 29%               | 37%            | 29%        | 31%        | 36%       | 31%                     | 34%                         | 43%                       | 24%          |
| % no understanding   | 28%          | 19%              | 16%             | 18%               | 37%            | 21%        | 10%        | 15%       | 13%                     | 21%                         | 17%                       | 38%          |



## Appendices



### Survey Program

The *Power of People: 2024 Workforce Survey* was designed to obtain feedback from dairy farmers on the current behaviours, intentions and attitudes towards workforce and workforce related issues.

### Questionnaire

A 19-minute computer assisted telephone interview (CATI) was conducted with dairy farmers within the scope of the survey. This interview measured, amongst other things:

- Employer profile
- Current workforce size and composition
- Recruitment experiences
- Recruitment and people management practices
- Recruitment plans for the next 12 months
- Loss of staff over the last 12 months
- Farm safety
- Human Rights Legislation

A range of Likert rating scale, closed and open-ended questions were used throughout the interview to accomplish this.

### Sample and Response

A sample list of farmers was provided by Dairy Australia, including details such as region, herd size, and contact details. In total, n = 400 farmer interviewers were completed during the interview phase of the survey:

|                           | Overall | DairyNSW | DairySA | DairyTas | Gipps Dairy | Murray Dairy | Subtropical Dairy | Western Dairy | WestVic Dairy | <150 cows | 151-300 cows | 301-500 cows | 501-700 cows | >700 cows |
|---------------------------|---------|----------|---------|----------|-------------|--------------|-------------------|---------------|---------------|-----------|--------------|--------------|--------------|-----------|
| # of completed interviews | n = 400 | n = 31   | n = 29  | n = 42   | n = 78      | n = 81       | n = 30            | n = 31        | n = 78        | n = 79    | n = 133      | n = 92       | n = 47       | n = 49    |

### Timing

The interviewing was undertaken between the 10<sup>th</sup> July 2024 and the 24<sup>th</sup> July 2024.

### Weighting

The survey data (unless otherwise specified) has been weighted to reflect the structure of the dairy industry within Australia by Region and by Herd Size. This data was provided by Dairy Australia.

### Segment Definitions

#### Workforce Size

- 1-2 people
- 3-4 people
- 5-6 people
- 7+ people

The Workforce Size is the number of people (including themselves) who currently work on the farm, segmented into 4 discrete groups. This segment is created using Q11 of the research (Including yourself, how many people currently work on your farm in permanent, fixed term, or and casual positions?).

#### Phase of Dairy Business

- Expansion
- Steady –where I want to be
- Steady – unable to expand
- Winding down

The Phase of Dairy Business is the respondent’s self-reported Operational Posture Profile. This segment is created using Q7 of the research (How would you describe the phase your dairy enterprise is currently in? Is it...).

# Appendices

## Changing industry structures

The In Focus report provides an explanation of the changing structure of dairy farms across Australia.

Two extracts from the report illustrate some of the changes occurring:

“Since 1979/80, the number of dairy farms in Australia has been steadily declining from 21,989 farms to 4,163 in 2022/23 (refer to Table 2). The rate of decrease in farm numbers has historically followed changes in farmgate milk prices from season to season. While strong prices can slow the rate of attrition, periods of weaker farmgate milk prices and/or adverse seasonal conditions can accelerate farm exits. Land prices and the performance of other agricultural industries can also encourage farm exits, regardless of farmgate milk prices.”

“Falling farm numbers reflects a world-wide trend in agriculture. Changing business practices have encouraged a shift to larger, more intensive production systems with greater economies of scale. However, while the number of farms across Australia has declined, the average herd size continues to grow. In 1985, the average herd size was 93 cows; this has grown to 305 cows in 2022/23. There is also an emerging trend of large farm operations milking more than 700 cows. Despite the average herd size increasing over time, Australia’s national herd has been declining.

Analysis of the Dairy Australia Salesforce data supports this shift in the scale of dairy farming operations over time:

| DEN data | 2024  | 2014  |
|----------|-------|-------|
| Small    | 39%   | 45%   |
| Medium   | 30%   | 30%   |
| Large    | 16%   | 14%   |
| X-Large  | 7%    | 5%    |
| XX-Large | 9%    | 6%    |
| n =      | 4,010 | 6,540 |

**Table 2** Number of registered dairy farms

|             | NSW | Vic   | Qld | SA  | WA  | Tas | Aust  |
|-------------|-----|-------|-----|-----|-----|-----|-------|
| 2006/07     | 924 | 5,346 | 734 | 354 | 222 | 475 | 8,055 |
| 2007/08     | 886 | 5,422 | 664 | 332 | 186 | 463 | 7,953 |
| 2008/09     | 860 | 5,462 | 648 | 320 | 183 | 451 | 7,924 |
| 2009/10     | 820 | 5,159 | 621 | 306 | 165 | 440 | 7,511 |
| 2010/11     | 807 | 4,588 | 595 | 286 | 170 | 437 | 6,883 |
| 2011/12     | 778 | 4,556 | 555 | 275 | 162 | 444 | 6,770 |
| 2012/13     | 731 | 4,284 | 518 | 268 | 160 | 437 | 6,398 |
| 2013/14     | 710 | 4,268 | 475 | 264 | 156 | 435 | 6,308 |
| 2014/15     | 704 | 4,127 | 448 | 252 | 157 | 440 | 6,128 |
| 2015/16     | 690 | 4,141 | 421 | 246 | 151 | 430 | 6,079 |
| 2016/17     | 661 | 3,889 | 406 | 240 | 148 | 427 | 5,771 |
| 2017/18     | 626 | 3,881 | 393 | 228 | 159 | 412 | 5,699 |
| 2018/19     | 575 | 3,516 | 356 | 212 | 150 | 404 | 5,213 |
| 2019/20     | 534 | 3,462 | 327 | 206 | 135 | 391 | 5,055 |
| 2020/21     | 523 | 3,080 | 307 | 198 | 132 | 378 | 4,618 |
| 2021/22     | 494 | 2,984 | 280 | 181 | 116 | 365 | 4,420 |
| 2022/23 (p) | 466 | 2,774 | 278 | 182 | 112 | 351 | 4,163 |

Source: State milk authorities and Dairy Australia



## Dairy Australia Power of People 2024 Workforce Survey August 2024

This survey was conducted by Intuitive Solutions on behalf of Dairy Australia.



For more information, please contact Michael Sparks at Intuitive Solutions:

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Or contact Heather McLaren at Dairy Australia

Email: [Heather.McLaren@dairyaustralia.com.au](mailto:Heather.McLaren@dairyaustralia.com.au)

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