Labour Shortages in Murray Valley Horticulture

A survey of growers’ needs and attitudes

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Peter Mares, Institute for Social Research, Swinburne University of Technology

1. Executive Summary

In recent years there has been extensive media reporting on the issue of rural labour shortages, particularly for seasonal work in horticulture. In these news stories, growers complain about lost export opportunities, about fruit left to rot on trees or vegetables ploughed back into the soil, and about the disruptive impact of sudden raids by government officials searching for illegal immigrants. The common refrain is that there is ‘good money’ to be made in fruit picking and other seasonal pursuits, but that Australians no longer want to take on these jobs because they are seen as too hot, too hard and too dirty. The growers’ difficulties in attracting labour have intensified calls for a new temporary work visa to allow overseas workers to enter Australia and take up seasonal employment.

However until now, the evidence of a labour shortage in horticulture has remained largely anecdotal. There has been little attempt to document or quantify the extent of the problem. Nor has there been any attempt to systematically analyse growers’ view of the seasonal labour market or their attitudes towards the idea of bringing in seasonal workers from overseas.

This report aims to help fill that gap, by providing more detailed analysis of the rural labour market in the rich irrigated horticultural region stretching along the Murray River between Swan Hill and Mildura in northwest Victoria. The findings are based on the evaluation of responses to a survey of growers in the region. The main aims of the survey were to assess the growers seasonal labour needs (if any), to gauge the extent and duration of labour shortages within the region and to assess the growers’ attitudes to the idea of a labour program to bring in seasonal workers from overseas.

We received valid responses from 176 growers. Our findings show that there is evidence of a serious labour shortage and that a majority of growers support the idea of using offshore workers to meet seasonal labour needs. Responses to this issue varied from very enthusiastic to extremely hostile. A minority of growers reject the idea of employing foreign labour outright, others display positive views towards a scheme to bring in overseas workers yet do not require their labour, while some insist that overseas workers are urgently needed but are unwilling to bear any of the costs of administering such a program. There is some correlation of the level of interest with the size of the enterprise and the crops grown, however personal attitudes also appear to be a major factor in distinguishing those who display interest in employing overseas workers from those who are unfavourable towards the idea.

Key findings are that:

- Half of all growers surveyed said that it was ‘difficult’ to find enough seasonal workers to meet the needs of their enterprise.

- One in ten respondents said that labour shortages are already preventing the expansion of their business and more than one quarter anticipated that labour shortages would prevent future expansion.
• A remarkably high number of growers (more than 1 in 4) admitted that they had sometimes found it necessary to employ illegal immigrants.

• A majority of growers (70%) supported the idea of using offshore workers to meet seasonal labour needs, with one in five growers saying that they would like to employ offshore workers every year.

• While supporting the idea of an offshore labour scheme, most growers are unwilling to pay a levy to fund the scheme, and only a minority would be prepared to provide workers with on-farm accommodation.

In summary, the survey results indicate that there is an identifiable shortage of workers to meet peak seasonal demands for labour in horticulture in the region under study and that a large majority of growers are interested in employing overseas workers on a temporary basis. However growers are generally reluctant to shoulder the inevitable administrative and organisational costs of such an offshore scheme.

The findings suggest that a logical next step would be to engage interested growers in a small-scale pilot project to further test the feasibility of bringing in overseas workers on a temporary basis. The evaluation of such a pilot project would assist in determining whether an ongoing overseas seasonal workers scheme is practical and desirable and could provide growers with a more concrete assessment of the potential costs and benefits to their enterprise. If such a trial proved successful, it could provide the basis for developing a realistic model for the administration, cost sharing and regulation of any such scheme in the longer term.
2. Introduction

This survey is a key component of the project *Pacific Labour and Australian Horticulture* being carried out at the Institute for Social Research at Swinburne University of Technology. The project aims to investigate the costs and benefits of increasing labour mobility between the Pacific and Australia by studying the feasibility of a seasonal labour program to employ agricultural workers from Pacific Island nations in the Swan Hill/Mildura region during periods of peak labour demand.

The original idea for the *Pacific Labour and Australian Horticulture* research project was conceived in response to the tragic story of Tongan man Mr Viliami Tanginoa who died in the Maribyrnong Immigration Detention Centre in Melbourne in December 2000. At the time of his death, Mr Tanginoa was 53 year old and had lived and worked in Australia as an undocumented migrant (illegal immigrant) for 17 years. In August 2000, police arrested Mr Tanginoa while he was picking fruit at Tooleybuc near Swan Hill. An investigation of Mr Tanginoa’s life and death made apparent the illogical nature of current labour market arrangements in horticulture. Fruit and vegetable growers are crying out for workers and find it difficult to find Australian residents who are willing and able to perform the tasks required. This results in relatively high levels of illegal employment in the horticultural industry. Primary producers who employ undocumented workers risk losing valuable crops if they are raided by immigration department compliance officers at harvest time, while undocumented migrants from the Pacific and elsewhere risk arrest and detention by the immigration department and are vulnerable to exploitation and abuse by unscrupulous employers. This is occurring at a time when Australia is sending aid dollars, and sometimes peacekeepers, to Pacific Island nations where social stability is threatened by high levels of underemployment and unemployment, particularly among young adults. For years, Island governments have lobbied Canberra for increased access to the Australian labour market for their citizens. Many Pacific Islanders are desperate for jobs and income that would enable them to provide better lives for their families.

Common sense suggests that there has to be a better way to organise things: that it should be possible to create a situation that would meet the needs of growers and workers, be beneficial to the economies of Australia and Pacific Island nations and reduce the problem of illegal employment in horticulture. At the very least, some form of seasonal labour program warrants serious investigation.

Since the research began, the issue has gained momentum, with Pacific Island leaders bringing it to the top of the agenda at the Pacific Island Forum meeting held in Papua New Guinea in October 2005. Although the Australian Prime Minister, Foreign Minister and Treasurer all subsequently rejected calls for a seasonal labour program for the Pacific Islands, the idea has continued to generate interest and public debate. The Senate Employment, Workplace Relations and Education Committee has announced an inquiry into ‘Pacific region contract labour’, and the core group of

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experts commissioned by the federal government to investigate future directions for the aid program has included the opening of the Australian labour market to unskilled workers from the Pacific Islands among its key recommendations. The National Farmers Federation has also called for consideration of an offshore labour program in its action plan to overcome rural labour shortages.

The Pacific Labour and Australian Horticulture project is funded with an Industry Linkage Grant from the Australian Research Council. The industry partners for the project are the Sunraysia Mallee Economic Development Board (Mildura), the Economic Development Unit of the Swan Hill Rural City Council and the international aid agency Oxfam/Community Aid Abroad.

The project has three key components:

1. The Australian component involves a survey of growers in the target area to determine their current use of seasonal labour, estimate the extent of any labour shortage and analyse grower attitudes to the idea of bringing in seasonal workers from overseas.

2. The Canadian component involves a critical analysis of Canada’s long running Seasonal Agricultural Workers Program, to see what lessons it may hold for Australia. This involved field work in Ontario, with funding form the Canadian government’s Faculty Research Program.

3. The Pacific component assesses responses to the idea of a seasonal labour program from stakeholders in the Pacific. This has involved fieldwork in Fiji, Tonga, Vanuatu and New Caledonia and a survey of the available literature on issues like remittances, migration and development, the social costs of migration, the impact of the extended absence of family members and so on.

The final write-up of the research findings is due to be completed in mid-2006 and this working paper represents an interim report on the Australian component of the project. While the industry partners have had significant input into the development and conduct of this research, the findings presented here should not be seen as representative of their views.

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5 For other work in progress see the conference paper: Nic Maclean and Peter Mares ‘Labour mobility in the Pacific: creating seasonal work programs in Australia’ October 2005, online at: [http://www.sisr.net/cag/projects/pacific.htm](http://www.sisr.net/cag/projects/pacific.htm)
3. Design and conduct of the survey

In June and July 2005, questionnaires were distributed to horticultural producers in Swan Hill, Robinvale, Mildura and surrounding areas with the aim of ascertaining growers’ assessment of the adequacy of the current labour supply, particularly for seasonal labour, and their attitudes towards the idea of a scheme to bring in seasonal workers from overseas.

The questionnaire consisted of 37 questions in a multiple choice format and inquired into the size and type of the growers’ enterprise and current workforce, their use of casual labour and their level of satisfaction with the available supply of seasonal workers. Respondents were asked to indicate whether or not they would be interested in a scheme to employ seasonal workers from overseas. Those who responded positively were asked to answer specific questions about how the costs of such a scheme might be paid, and about the recruitment, accommodation and remuneration of such offshore workers. Growers were asked to provide detailed responses (for example specifying the current number of seasonal employees engaged for each month of the year and the tasks undertaken by those workers) and space was included for respondents to add their own comments. The survey was anonymous, and confidentiality was assured, although growers were invited to provide contact details for follow up purposes (which many chose to do). The surveys were mailed back to the Institute for Social Research in a pre paid envelope and the data has been analysed using SPSS software.

Ethics approval was granted for this project by Swinburne University. The main issues of concern were confidentiality, particularly in relation to commercial data and questions regarding employment of illegal immigrants. A covering letter was attached to the survey explaining the nature of the project and assuring participants that all answers were confidential. Strict anonymity was assured. (A copy of the questionnaire and covering letter is included at Appendix 2).

With the assistance of industry groups, a total of 2,054 questionnaires were distributed in three separate mail outs.

1. The Murray Valley Citrus Board mailed out 402 questionnaires to individual citrus growers in individually addressed envelopes;

2. The Swan Hill office of the Victorian Department of Primary Industries distributed 371 questionnaires to a diverse range of horticultural growers. The questionnaires were included as an insert to a regular newsletter mail out.

3. A total of 1281 questionnaires were distributed as an insert into the regular grape-growers newsletter *The Vine*. Of these, 851 questionnaires were sent to members of the Australian Dried Fruits Association and 430 questionnaires were sent to members of the Australian Table Grape Association.
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We received 176 valid replies. This equates to a crude response rate of 8.6% (some returns were unusable because they were incomplete, did not deal with horticultural production, or were returned late). Given the various means of distribution it is difficult to calculate a meaningful response rate. For those that received the questionnaire in an individually addressed envelope (citrus growers) the response rate was around 20% (this is without accounting for those that were returned to sender). This is a very good response rate for a mail-out survey. There was a much lower response rate from those who received the survey inserted into a regular newsletter (dried fruits, table grape growers, and members of the DPI-Swan Hill mailing list) though discussing this in terms of a clear-cut response rate is problematic. Some recipients of the newsletter may not actually own or manage a farm or may not have opened the newsletter to find the questionnaire. The decision to include the survey with regular a newsletter mail out was done in order to reduce the cost and administrative burden of the survey, which was carried out on a limited budget.

One potential problem with any survey of this kind is the issue of self-selection – the concern that a questionnaire is more likely to prompt answers from respondents who have a strong opinion on the issues under study, whereas those who are indifferent to the questions raised will not bother to fill in the form and return it. We acknowledge that this is a potential concern. Certainly the questions did elicit some passionate responses suggesting that some growers do have strong views on the topics raised. However the views expressed were diverse and the survey captured responses from growers for whom labour shortages were not an issue as well as those who feel that their enterprises are under stress due to difficulties in attracting seasonal workers.

Overall we received responses from a broad cross-section of the horticultural industry in the region including producers in all major crop segments (stone fruit, citrus, vegetables, wine grapes, table grapes and dried fruits), from growers with large, small and medium sized enterprises and from a wide range of localities within the target area.

As the survey sample was existing producers it did not capture the views of many of the large-scale corporate investors who are undertaking major plantings in the target region. Many of these projects are still in the development phase and are not yet producing crops. It was recognised that while these projects are few in number, relative to the number of horticultural enterprises in the region as a whole, they nevertheless have the capacity to generate significant future demand for seasonal labour, and their disproportionate size and market power could have a dramatic impact on smaller growers competing for the same pool of potential workers. In order to capture the labour market needs of this segment of the industry, telephone interviews were conducted with five major investors (who were identified with the assistance of our project partners). The findings from these telephone interviews are discussed separately below.

4. Farm Characteristics

Survey participants were asked to identify the size of their landholding, the ownership structure of their farming enterprise, and the major crops grown. This information
was gathered to enable the sample to be checked against the general characteristics of horticultural production in order to ensure that the sample was broadly representative.

Figure 1 shows the range of enterprise sizes within this sample. More than half the respondents were from small landholdings of less than 20 hectares. The most common enterprise size range reported was less than ten hectares (30%), followed by ten to nineteen hectares (26%). Only 9% reported that their enterprise was larger than 100 hectares.

**Figure 1 – Size of Enterprise (hectares)**

![Size of Enterprise Chart](chart)

The vast majority (95%) of respondents described their operations as a family farm, or as a family farm with a company structure, while only 5% operated as private or public companies (Figure 2).

**Figure 2 – Type of Enterprise**

![Type of Enterprise Chart](chart)

* Other not included (1%)
As has been acknowledged elsewhere, ‘the diversity of horticultural production means that the average area of land operated by farm businesses cannot easily (or meaningfully) be determined’\(^6\). However it is clear that the vast majority of horticultural enterprises are family farms on blocks smaller than 50 hectares.\(^7\) Moreover, the farm sizes and farm types captured in our survey correspond to the general pattern of farming in Australia, whereby the majority of enterprises are small family farms, but the bulk of agricultural output comes from relatively few large-scale corporate entities\(^8\).

Many horticultural producers grow more than one type of crop. For the purposes of this research, growers were classified according to their largest crop type (see figure 3). Citrus growers accounted for almost a third of all responses (31%), followed by dried vine fruits (23%), wine grapes (20%), stone fruit (9%), table grapes (9%) and vegetables (5%).

**Figure 3 – Main Crop Type**

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<table>
<thead>
<tr>
<th>Crop Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Citrus</td>
<td>31%</td>
</tr>
<tr>
<td>Grapes (Wine)</td>
<td>20%</td>
</tr>
<tr>
<td>Dried Vine Fruits</td>
<td>23%</td>
</tr>
<tr>
<td>Stone Fruit</td>
<td>9%</td>
</tr>
<tr>
<td>Vegetables</td>
<td>5%</td>
</tr>
<tr>
<td>Grapes (Table)</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
</tr>
</tbody>
</table>
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N=172

NB  Totals may not add due to rounding
(For the purposes of analysis, mangoes, avocados and persimmons were counted as stone fruit. Crops falling into the ‘other’ category included: apples, walnuts and olives/olive oil).

When asked about the level of work in their enterprise, 63 % of respondents said it varies dramatically according to the time of the year, while only 5% reported that the level of work in their enterprise was constant all year around. This conforms to expectations that there are large fluctuations in the regional demand for labour due to the seasonal nature of horticultural production.

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\(^6\) Australian Farm Institute ‘Australian Farm Sector Demography: Analysis of current trends and future farm policy implications’ August 2005 p.16

\(^7\) According to the Australian Farm Institute report cited above, 72% of horticultural enterprises occupy a land area of less than 50 hectares.

\(^8\) More than half of Australia’s farm output is estimated to come from just 10 per cent of rural enterprises, while the smallest 50 percent of farms generate only 10 per cent of gross production. Productivity Commission, 2005 Trends in Australian Agriculture, Research Paper, Canberra p.xxiv
5. Current labour situation

Most horticultural producers report employing seasonal workers at some stage throughout the course of a year, with the numbers employed ranging from a minimum of 1 to a maximum of 60. The median number of seasonal/temporary workers employed throughout the course of a year was 10.

Figure 4 – Seasonal workers currently employed (by month)

![Graph showing seasonal workers employment by month]

Figure four shows the total number of seasonal workers who are currently employed by survey respondents in each month. There are three identifiable peaks in the engagement of seasonal labour:

**Period 1** (January to March) coincides with the harvest of grapes and stone fruit;
**Period 2** (June to August) coincides with the winter citrus harvest and vine and stone fruit pruning;
**Period 3** (September to November) is an important time for thinning stone fruit and grapes.

Other specific tasks identified by respondents as requiring seasonal labour were bunch trimming, grafting, nursery work, leaf and shoot thinning, spraying, rack work, packing, planting and harvesting vegetables, flowers and seeds.

Respondents were asked a range of questions that sought to identify how well they were currently able to meet their seasonal labour needs. The answers reveal a mixed picture. A significant proportion of growers expressed relative satisfaction with the operation of the regional labour market (50%), while another significant cohort voiced considerable concern about a shortage of workers (50%). As Figure 5 shows,
about half of the respondents said that finding sufficient seasonal workers is ‘very easy’ or ‘fairly easy’, while the other half expressed the opposite view, that securing adequate numbers of workers was ‘difficult’ or ‘impossible’.

**Figure 5 – Level of ease in finding sufficient seasonal workers for your enterprise**

![Figure 5](image)

When the question was posed in slightly different terms and in a less personal and direct manner (growers were asked to assess the overall availability of seasonal workers in their region, rather than their own success in attracting workers), the evaluation of the local labour market tended to be slightly more negative (Figure 6). Only 2% of respondents described the supply of seasonal workers as ‘plentiful’ and only 38% rated the supply as ‘adequate’, while a clear majority said it was either ‘inadequate’ (48%) or ‘extremely inadequate’ (8%).

**Figure 6 – The availability of seasonal horticultural workers in your region**

![Figure 6](image)

While most growers identify a shortage of labour in their region, only a few express dissatisfaction with the skills or aptitude of those workers who are available. When growers were asked to evaluate the quality of the work performed by their current seasonal workforce, roughly half the respondents rated it as ‘average’ and about one
third rated the quality as ‘high’. A small number of growers (less than 10% of the sample) assessed current work standards as being ‘poor’ or ‘very poor’ and this was matched by a similar number who rated the quality of work performed as ‘very high’. Responses were similar when growers were asked about the ‘work ethic’ of their current seasonal workforce: most rated it as ‘average’, ‘good’ or ‘very good’.

However levels of satisfaction fell when growers were asked about their experience of workers recruited through the local Harvest Labour Office. Harvest labour offices attempt to coordinate the supply of seasonal workers by linking industry with service providers under the federal government’s Job Network. Since July 2003, harvest labour offices have been connected via the National Harvest Labour Information Service, which aims to ‘match an itinerant pool of workers with variable seasonal work’.9 A majority of respondents had used their local harvest labour office to find seasonal workers (54.5%), but only a minority of these (30.2%) expressed satisfaction with the number of workers recruited and almost three-quarters (70.5%) said that there were ‘dissatisfied’ or ‘very dissatisfied’ with the quality of the workers recruited in this way. This suggests that attempts to mobilise the long-term unemployed or other disadvantaged Australians into seasonal work will not be successful without high levels of intensive government support. As one grower commented:

I feel the current employment agencies are inclined to send unemployable 'dole' candidates on occasions. This can be at busiest time of year with crops at risk and you time becomes unproductive because of need to manage poor performers.

Other growers voiced similar frustration:

Much rather have somebody who is prepared to have a go regardless of where they are from than somebody being sent to work against their wishes ie Dole being cut.

A shortage of seasonal labour creates the need to employ those who are extremely tiring in a very critical time.

When asked if seasonal labour shortages had or were likely to prevent the expansion of their enterprise, the majority of respondents said ‘no’. In part this probably reflects the nature of the sample, which includes a large number of small family-farms of less than 20 hectares (see Figure 1) for whom expansion may not be feasible in any case. As illustrated in Figure 7, a sizeable minority - over one third of growers - felt that labour shortages are currently restricting expansion, or are likely to restrict expansion in future. In short, there is evidence that uncertainties in the labour market act as a brake on the expansion of the horticultural industry in the region.

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Another indication of the difficulty of securing adequate numbers of seasonal workers came in the response of growers to a question about employing illegal immigrants. More than one in four growers (28%) admitted that they had to do this ‘sometimes’, ‘often’ or ‘always’. This is a surprisingly high proportion and the actual rate of illegal employment may be even higher, given that:

a) it is conceivable that not all respondents who knowingly employ illegal immigrants would admit to the practice (even in an anonymous survey), and

b) some survey respondents may employ illegal immigrants unwittingly (either via labour hire contractors or when unauthorised workers present false documents and tax file numbers.)

Employing illegal immigrants entails risks: although growers are unlikely to be prosecuted (given that there are currently no formal sanctions for employing undocumented workers), they may be subjected to raids and lose their workforce in the midst of a time-sensitive harvest with the result that valuable crops are wasted.

Most horticultural producers agree that they would prefer to employ the same seasonal workers in each subsequent season. This emphasises the desire for labour reliability and skills retention. The general categorisation of horticultural work as ‘low skilled’ or ‘unskilled’ is misleading since it downplays the knowledge required for handling specific crops and tasks. For example, vines must be correctly pruned to produce bunches of table grapes that are attractive to consumers in size and shape; stone fruit that is handled roughly or picked when it is too hot will spoil before it gets to market; inexperienced orange harvesters are more likely to injure themselves in falls from ladders. One large scale table grape grower from Mildura estimates that he could minimize the volume of spoilage and rejected and wasted fruit by ‘sixty or
seventy percent’ if he was able to have the same workers return year after year. Some of the comments provided by horticulture producers in response to the questionnaire add weight to this view:

Not all people can do the work required at the skill level required. Just adding extra numbers to the work pool is not in itself an automatic solution.

Workers need training in the tasks they are to perform. A lot of workers cannot make money without being trained, picking pruning etc.

Finding them (seasonal workers) is easy, retaining them is the problem.

Finding workers that are reliable is our biggest challenge. They turn up one day and leave the next. They don’t tend to stick around. We need people that are going to complete the work and stay to the end of the season.

Overall, the responses of growers to questions about the current operation of the seasonal labour market in the Mildura-Swan Hill region show that while there are labour shortages, not everyone is experiencing problems to the same degree. Nevertheless, more than half of all growers expressed dissatisfaction with the current supply of seasonal labour in their area and more than one third said that labour shortages were inhibiting the expansion of their enterprise, or believed that they were likely to do so in future. The responses indicate that the employment of undocumented migrants is likely to continue unabated unless measures are taken to expand the pool of legitimate labour. This creates a lose-lose-lose situation for employers, workers and government: employers will continue to run the risk of raids that interrupt their peak harvest, undocumented workers will remain vulnerable to exploitation, arrest and detention, and government must continue to finance expensive immigration compliance activities that foster ill-feeling in the horticultural industry and local communities.

6. Attitudes to offshore labour

The fact that approximately half the growers from this sample experience difficulty in securing labour opens up the possibility that seasonal gaps in the horticultural labour market could be filled by temporary offshore workers. However, whether a seasonal labour program to recruit overseas workers offers a feasible and practical solution to this problem depends on whether horticultural producers in the Swan Hill/Mildura region would support such a scheme in practice.

To explore growers’ attitudes to the idea of an offshore labour program, respondents were asked if they would be interested in employing seasonal workers from overseas. The responses revealed sharply divided opinions. While a majority of growers expressed interest in making use of an offshore scheme, almost one third (31%) said that they would ‘never’ be interested in employing seasonal workers from overseas. (Figure 8)

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10 Personal discussion with the author
Figure 8 – Level of interest in employing overseas workers

![Bar chart showing interest levels.](chart.png)

N=169

NB  Totals may not add due to rounding.

In unsolicited comments, many growers expressed strong disapproval of an offshore scheme, with several expressing the view that unemployed Australians should be encouraged (or forced) to do seasonal work before consideration is given to bringing in foreign workers:

- The dole should be withheld to make some of the people who think it is a right to get it go out and do some work. I see young kids in my town sitting around doing stuff all when we need pickers. They don't need to be smart just willing to do some hard work.
- I don't think overseas workers should be employed. There are enough workers on the dole.
- I would not like to see workers imported.
- We do not need bus loads of unemployed temporary foreign workers wandering around with little work available.
- No Chinese slave labour.
- I think most growers would prefer to employ locals or at least Australian residents, as there are still many unemployed.
- Stop the unemployment/or work for the dole - no need for overseas labour.
- Give the local unemployed the incentive or penalty to seek employment.

A majority of respondents (70%) did however, express interest in employing overseas workers on a seasonal basis. More than one third of growers (36%) said they would be interested in some years, 14% said they would be interested in most years, while one in five (20%) said they would be interested in employing overseas workers every year. Once again, growers’ unsolicited comments indicate that it is an issue that arouses considerable passion:
An essential! Our industry relies completely on the current crop of illegal overseas workers (who have mostly just overstayed their visas) to exist. Without them the crop would not get picked.

If it is needed I strongly agree to bring in seasonal workers from overseas as locals on the dole don't work!!

If people want to work let them come.

Let them come and stop sending them back when we need them the most. Aussies don't want the work (sorry about the generalisation).

The sooner the better.

In the citrus industry seasonal workers who are willing to work are hard to find, without overseas workers the crop would not be able to be harvested.

Those growers expressing an interest in employing overseas workers were asked follow up questions about the potential number of overseas workers they could employ, the duration of the employment, what they might offer workers in terms of pay, accommodation and training and what they might be willing to contribute to the cost of administering an offshore scheme.

Figure 9 plots and compares three sets of data on a month by month basis:
- the number of seasonal workers currently employed by those respondents interested in employing overseas workers;
- the number of offshore seasonal workers requested by all growers interested employing overseas temporary labour in at least some years; and,
- the number of offshore seasonal workers requested by growers who are interested in employing offshore workers every year.

Figure 9 – Seasonal workers currently employed and seasonal workers wanted (by month)
There is a concordance in the peaks and troughs of the first two plot lines – between current seasonal employment and the projected seasonal demand for overseas workers of all growers interested in an offshore scheme. In other words, growers’ projected need for additional workers corresponds to the actual seasonal variations in labour demand. This lends credibility to the survey results as an indication of industry needs: it suggests that responses were a considered response to seasonal variations in the operation of particular enterprises, rather than simply an ambit claim or ball park figure. The responses indicate that growers believe that in some years they could employ 30-50% more seasonal workers, if such workers were available.

There is less obvious seasonal variation evident in the third plot line, showing the projected labour needs of only those one-in-five growers who expressed an interest in employing offshore seasonal workers every year. This suggests that there is a baseline of unfilled labour demand that exists throughout the year (albeit spread across different farms in different seasons) and indicates that there could be capacity for the region to absorb permanent migrants willing to perform horticultural labour, as well as temporary seasonal workers. However Australia’s current migration program has no provision for the migration of workers to perform agricultural work of this nature.\textsuperscript{11}

The interest in employing overseas workers varies across different sectors of the horticultural industry (Figure 10). The vegetable, table grape, stone fruit and citrus sectors all display strong interest in employing overseas workers. In the citrus sector, which has the largest sample, 62% of respondents state they would be interested in employing overseas labour, with one in five (21%) interested in employing every year. Employers in the wine grape sector are the least interested in foreign labour with 39% saying they would never be interested in employing overseas workers. This is in accord with expectations given the high level of mechanisation in wine grape harvesting. As one wine-grower comments:

\begin{quote}
We do not hire labour for harvesting as wine grapes are picked mechanically.
\end{quote}

Nevertheless, despite mechanised harvesting, 36% of wine grape growers responded would hire overseas workers in some years.

\textsuperscript{11} Under the Australian Standard Classification of Occupations (ASCO) agricultural and horticultural labourers are categorised as skill level 9 (the lowest point on the scale), which is insufficient to meet the points test for migration to Australia regardless of any other circumstances (such as offers of work, age or English language proficiency).
Interest in employing overseas workers increases with farm size. Those with small farms of less than 10 hectares were the most likely to rule out the offshore labour option altogether, with 49% saying that they would ‘never’ be interested in employing overseas workers. Horticultural producers on larger farms clearly demonstrate the greatest interest in employing overseas workers, with 69% of growers with landholdings of one hundred hectares or more responding that they would be interested in employing overseas workers every year (although the sample size is small). Amongst landholders with what might be termed ‘mid-sized’ blocks, opinions are spread more evenly between the various options. In general however, as Figure 11 demonstrates, there is a rough progression between the two poles – as the size of the landholding rises, so does the interest in overseas workers.

Respondents were asked to identify the geographical region from which they would most prefer to draw potential overseas workers. The choice offered was (in order): The Pacific Islands and/or Papua New Guinea; Southeast Asia (Indonesia, Malaysia,
Vietnam, Cambodia, Burma, Laos); China; ‘any country, doesn’t matter’; and, ‘other’. The results showed that growers are by and large indifferent to the country of origin of potential overseas workers, with two thirds selecting the option ‘any country, doesn’t matter’. Nor is there any clear gender preference for overseas workers, with most growers saying that it did not matter whether workers were male or female, or preferring a mix of male and female workers. When asked about the level of horticulture experience they would expect the workers to have, some experience or no experience were the main responses and most horticultural producers said that paid training on the job would be available for the workers. In general, workers’ attitude and fitness appeared to be the main consideration of employers. As one grower commented:

As long as they work I don’t care where they come from.

Although survey respondents were not specifically asked about language skills, a number volunteered that ability to speak English would be desirable. When asked if they would be interested in attending a half day information session to learn about overseas workers’ culture and ways, the majority answered yes, further demonstrating a generally positive attitude towards the employment of foreign labour.

The vast majority of growers reported that they currently pay seasonal workers at award wages (49%) or above (36%). (Other respondents indicated that they paid a combination of rates depending on the worker, or that relied on a labour hire contractor who determined wage rates). When asked what level they would be willing to pay overseas workers, most growers (73%) indicated that the legally-mandated award rates that apply to domestic employees would also be extended to foreign workers. A small group of growers (11.9%) expressed a willingness to pay overseas workers above the award wage and only one respondent expected to be able to pay overseas workers less than the award wage.

7. Sharing the costs

The survey responses show that most growers hold broadly positive attitudes towards the idea of importing seasonal labour. However when confronted with questions about sharing the costs of such a scheme, respondents exhibit less enthusiasm. The largest group of employers (39%) believed that all of practical costs (for such things as visas, health checks and airfares) should be recovered from the workers’ wages, while 32% said that these costs should be shared between primary producers, workers and retailers (Figure 12).
Moreover the majority of growers (54%) said they would not be prepared to pay a levy to cover the administrative costs of such a scheme, while a further 28% said they would be willing to pay a maximum of only ten dollars per worker per week (Figure 13).

The provision of reasonably-priced reasonable-quality accommodation for seasonal workers is already a major concern in the Mildura-Swan Hill region and such accommodation would be in much greater demand if seasonal workers were brought in from overseas. However, when growers were asked if they would be willing to provide onsite board and lodging to overseas workers, the overwhelming response (62%) was ‘no’.
8. Major investors

In preparing this report, preliminary data from the survey was presented to a group of interested stakeholders. One perceived shortcoming of the survey data identified in that meeting was its failure to adequately capture the implications of major agricultural investments currently being undertaken in the Swan Hill-Mildura region. While responses were received from 16 growers with landholdings of 100 hectares or more, our industry partners and other industry figures familiar with the region were aware that there were a number of major projects in development.

In response to this feedback, interviews were conducted with the owners and/or managers of five major enterprises currently engaged in significant plantings of almonds, table grapes, stone fruit, wine-grapes and pistachios. Collectively the five projects were anticipated to account for a total of approximately 12000 hectares under cultivation by 2010. Future labour needs were difficult to estimate and varied greatly between enterprises. For example, almonds are mechanically harvested requiring about 20 workers per 800 hectares of trees, whereas table grapes are hand-cut and very labour intensive, requiring a much higher number of workers at peak harvest. In broad terms the managers of these enterprises anticipate that at the busiest times of the year, they will, between them, need to employ an additional 1200 seasonal workers.

All five major investors acknowledged that securing a reliable labour supply in the future was a primary concern for their enterprise and all expressed an in principal interest in gaining access to overseas workers if an offshore labour scheme was to become a reality. All respondents indicated a willingness to pay a levy to cover the administrative costs of such a scheme, and to shoulder a proportion of the workers’ travel costs, as long as certain conditions were met:

a) that the required work was performed to a satisfactory standard, and
b) that workers were available for a reasonable length of time.

As an illustration of these points, one farm manager commented:

If you asked me to pay an extra $500 to get a worker for just two weeks, I’d tell you to bugger off. If it was three months, I’d look at it.

Another farm manager put it this way:

The biggest disappointment with seasonal workers is that they leave after two days. If you can get them to stay and then spread out the additional costs over a three month period, then the figures add up.

And a third commented:

We’d look at anything depending on the feasibility.

Another common factor to emerge from discussions with major investors and/or their managers was the importance of accommodation (or the lack of it) in limiting the availability of seasonal labour. Three of the five respondents already provided on-site
accommodation (either free or at cost) to their current workforce and had seen this as an important ‘carrot’ for attracting staff during the development phase of their project. The other two respondents both acknowledged that accommodation shortages in their area were a major barrier to luring potential workers from further afield. One recognised that measures might be needed in future to address the problem:

We have no onsite accommodation. If we needed it to get labour, then we’d have to put some in.

The other was resistant to the idea of providing accommodation, but was instead pursuing discussions about the issue with local authorities and building contractors:

We’re not a developer. If someone came in and put in some rental properties, we could fill it up with our employees.

9. Conclusion

Our findings demonstrate that there is a shortage of available workers to meet peak seasonal demands for labour in the horticultural industry along the Murray River between Swan Hill and Mildura. A majority of horticultural producers are interested in employing overseas workers on a temporary basis, with about one if five growers saying that they could offer seasonal jobs to overseas workers every year. Growers clearly identify the benefits of having the same workers return in subsequent years, so that they retain skills and local knowledge (something which is generally not achieved through the current use of backpackers on working holiday visas). However, growers are generally reluctant to shoulder the inevitable administrative and organisational costs of such a scheme, with a significant minority (39%) expressing the view that all costs should be borne by the workers themselves through wage deductions. The level of interest in an offshore labour scheme is related to the size of the respondent’s enterprise, with growers on large land-holdings far more likely to want overseas workers in every year. In addition, responses from the five major investors interviewed separately by telephone, suggest that larger growers understand that they will need to make some contribution to the administrative and practical costs of such a scheme and that this investment in a secure labour supply will ultimately pay dividends for their business.

Our analysis of the survey data suggests that it makes sense to engage interested growers in a small scale pilot project to further test the feasibility of bringing in overseas workers to fill seasonal gaps in the horticultural labour market. The evaluation of such a pilot project would assist in determining whether an ongoing overseas seasonal workers scheme is practical and desirable and could provide growers with a tangible assessment of the potential costs and benefits to their enterprise. If such a trial proved successful, it could provide the basis for developing a realistic model for the administration, cost sharing and regulation of any such scheme in the longer term.
Appendix 1: Selected survey data

Table A1.1 – Size of Enterprise (hectares)

<table>
<thead>
<tr>
<th>Enterprise Size</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 10 hectares</td>
<td>51</td>
<td>30%</td>
</tr>
<tr>
<td>10 - 19 hectares</td>
<td>45</td>
<td>26%</td>
</tr>
<tr>
<td>20 - 29 hectares</td>
<td>28</td>
<td>16%</td>
</tr>
<tr>
<td>30 - 49 hectares</td>
<td>20</td>
<td>12%</td>
</tr>
<tr>
<td>50 - 99 hectares</td>
<td>12</td>
<td>7%</td>
</tr>
<tr>
<td>100 hectares or more</td>
<td>16</td>
<td>9%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>172</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Table 1.2 – Type of Enterprise

<table>
<thead>
<tr>
<th>Type of Enterprise</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family farm/owner operator</td>
<td>130</td>
<td>75%</td>
</tr>
<tr>
<td>Family farm operating as private company</td>
<td>35</td>
<td>20%</td>
</tr>
<tr>
<td>Private company</td>
<td>6</td>
<td>3%</td>
</tr>
<tr>
<td>Listed company or subsidiary of listed company</td>
<td>2</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>174</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Table A1.3 – Produce Grown

<table>
<thead>
<tr>
<th>Main produce category</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stone Fruit</td>
<td>16</td>
<td>9%</td>
</tr>
<tr>
<td>Vegetables</td>
<td>9</td>
<td>5%</td>
</tr>
<tr>
<td>Citrus</td>
<td>54</td>
<td>31%</td>
</tr>
<tr>
<td>Grapes (Wine)</td>
<td>34</td>
<td>20%</td>
</tr>
<tr>
<td>Grapes (Table)</td>
<td>15</td>
<td>9%</td>
</tr>
<tr>
<td>Dried Vine Fruits</td>
<td>40</td>
<td>23%</td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
<td>2%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>172</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>
### Table A1.5 – Level of ease in finding sufficient seasonal workers for your enterprise

<table>
<thead>
<tr>
<th>Level of Ease</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finding seasonal workers is very easy</td>
<td>13</td>
<td>8%</td>
</tr>
<tr>
<td>Finding seasonal workers is fairly easy</td>
<td>68</td>
<td>42%</td>
</tr>
<tr>
<td>Finding seasonal workers is difficult</td>
<td>79</td>
<td>49%</td>
</tr>
<tr>
<td>Finding seasonal workers is impossible</td>
<td>2</td>
<td>1%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>162</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

### Table A1.6 – Availability of seasonal horticultural workers in your region

<table>
<thead>
<tr>
<th>Availability</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>The supply of workers is plentiful</td>
<td>3</td>
<td>2%</td>
</tr>
<tr>
<td>The supply of workers is adequate</td>
<td>62</td>
<td>38%</td>
</tr>
<tr>
<td>The supply of workers is inadequate</td>
<td>79</td>
<td>48%</td>
</tr>
<tr>
<td>The supply of workers is extremely inadequate</td>
<td>13</td>
<td>8%</td>
</tr>
<tr>
<td>Don't know/unsure</td>
<td>6</td>
<td>4%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>163</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

### Table A1.7 – Have seasonal labour shortages prevented the expansion of your enterprise?

<table>
<thead>
<tr>
<th>Reason</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>No, and they are not likely to</td>
<td>92</td>
<td>54%</td>
</tr>
<tr>
<td>Not yet, but they are likely to in the future</td>
<td>47</td>
<td>27%</td>
</tr>
<tr>
<td>Yes, they are currently preventing expansion</td>
<td>11</td>
<td>6%</td>
</tr>
<tr>
<td>Yes, and they have prevented expanding in the past</td>
<td>9</td>
<td>5%</td>
</tr>
<tr>
<td>I am not interested in expanding</td>
<td>12</td>
<td>7%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>171</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>
Table A1.8– Level of interest in employing overseas workers

<table>
<thead>
<tr>
<th>Level of Interest</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Never</td>
<td>52</td>
<td>31%</td>
</tr>
<tr>
<td>In some years</td>
<td>60</td>
<td>36%</td>
</tr>
<tr>
<td>In most years</td>
<td>24</td>
<td>14%</td>
</tr>
<tr>
<td>Every Year</td>
<td>33</td>
<td>20%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>169</strong></td>
<td><strong>100.0</strong></td>
</tr>
</tbody>
</table>

Table A1.9 – How should administrative and practical costs incurred in recruiting overseas workers be recovered?

<table>
<thead>
<tr>
<th>How Costs Should Be Recovered</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary producers who employ O/S workers should pay a levy</td>
<td>13</td>
<td>11%</td>
</tr>
<tr>
<td>There should be a levy on the sale of all horticultural products</td>
<td>5</td>
<td>4%</td>
</tr>
<tr>
<td>All costs should be deducted from the O/S workers’ wages</td>
<td>45</td>
<td>39%</td>
</tr>
<tr>
<td>Costs be shared b/w primary producers, workers &amp; retailers</td>
<td>37</td>
<td>32%</td>
</tr>
<tr>
<td>Other</td>
<td>15</td>
<td>13%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>115</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>
Appendix 2: Letter and questionnaire sent to growers

Dear Primary Producer,

We are conducting a survey of seasonal labour needs in the horticulture industry and attitudes towards the potential recruitment of seasonal workers from overseas. The survey is being carried out by the Institute for Social Research at Swinburne University of Technology. We would be grateful if you could complete the attached questionnaire, which will take about half an hour of your time.

Your participation in this survey is entirely voluntary and all your answers are confidential. Information about the size of your landholding and the crops you grow is for statistical purposes only, so that we can check that we have a reasonable sample of horticultural producers. You will not be named or identified in any way in our research report and your answers will not be passed on to third parties.

The survey is part of a broader research project being carried out in collaboration with the Sunraysia Mallee Economic Development Board (Mildura), the Swan Hill Rural City Council and Oxfam/Community Aid Abroad. The survey has been assisted by the Department of Primary Industry, the Murray Valley Citrus Marketing Board, the Australian Table Grape Association and the Australian Dried Fruits Association. However none of these organisations will have access to the completed questionnaires.

If you have any questions about the survey, or if you would prefer to answer the questions over the phone, then please do not hesitate to contact me on the numbers below.

Please complete this survey as soon as possible and return it to me in the pre-paid envelope provided.

Peter Mares
Senior Research Fellow
Institute for Social Research
Swinburne University of Technology
Ph: 03 9214 4569 or 0439 204 858
pmares@swin.edu.au

Complaints: If you are unhappy with any aspect of this study as it affects you, please contact: The Chair, Human Research Ethics Committee, Swinburne University of Technology, PO Box 218, Hawthorn, Vic. 3122  Phone: 03 9214 5223
Questionnaire

1 What is the postcode of your landholding and the name of the nearest major town?
(We require this information to help us ensure we have a range of respondents from across the region.)

Postcode: ______________ Name of town: __________________

2 How many hectares is your landholding?

Hectares: __________

3 In the table below please indicate all the produce you grow (and the estimated annual production and area cultivated) on your landholding each year.

<table>
<thead>
<tr>
<th>Product</th>
<th>Estimated annual production (tonnes)</th>
<th>Estimated area cultivated (hectares)</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) Almonds</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b) Asparagus</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c) Avocados</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d) Beans (Green)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e) Cabbages</td>
<td></td>
<td></td>
</tr>
<tr>
<td>f) Capsicum/Chillies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>g) Carrots</td>
<td></td>
<td></td>
</tr>
<tr>
<td>h) Citrus</td>
<td></td>
<td></td>
</tr>
<tr>
<td>i) Cucumbers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>j) Dried Vine Fruits</td>
<td></td>
<td></td>
</tr>
<tr>
<td>k) Garlic</td>
<td></td>
<td></td>
</tr>
<tr>
<td>l) Grapes (Table)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>m) Grapes (Wine)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>n) Lettuce</td>
<td></td>
<td></td>
</tr>
<tr>
<td>o) Melons</td>
<td></td>
<td></td>
</tr>
<tr>
<td>p) Mushrooms</td>
<td></td>
<td></td>
</tr>
<tr>
<td>q) Olives/Olive Oil</td>
<td></td>
<td></td>
</tr>
<tr>
<td>r) Pumpkin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>s) Stone Fruit (apricots, cherries, nectarines, peaches, plums)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>t) Sweet Corn</td>
<td></td>
<td></td>
</tr>
<tr>
<td>u) Tomatoes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>v) Zucchini</td>
<td></td>
<td></td>
</tr>
<tr>
<td>w) Other (please specify)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
4 Which of the following best describes your enterprise? (Please circle one only.)
Family farm/owner operator ........................................................................................................1
Family farm operating as a private company .............................................................................2
Private company ..........................................................................................................................3
Listed company or subsidiary of a listed company (agribusiness) ...........................................4
Other (please specify) ..................................................................................................................5

5 How many of each of the following categories of workers do you employ over the course of a year?
   a) Full time workers (employed all year round): ___________ number of workers
   b) Part time workers (employed all year round): ___________ number of workers
   c) Seasonal/temporary workers: ___________ number of workers

6 Please indicate the level of work in your enterprise. (Please circle one only.)
The level of work is constant all year round .............................................................................1
The level of work varies slightly according to the time of year ..............................................2
The level of work varies dramatically according to the time of year ......................................3

7 If you employ workers on a seasonal basis please indicate, roughly, the number of workers who fall into each of the following categories in the table below.
(If you do not employ seasonal workers please continue at question 21.)

<table>
<thead>
<tr>
<th>Type of seasonal worker</th>
<th>Estimated number of workers</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) Members of your own family</td>
<td></td>
</tr>
<tr>
<td>b) Australians who live in the local area</td>
<td></td>
</tr>
<tr>
<td>c) Australians from outside the local area</td>
<td></td>
</tr>
<tr>
<td>d) Overseas backpackers with work permits (working holiday makers)</td>
<td></td>
</tr>
<tr>
<td>e) Overseas backpackers without work permits</td>
<td></td>
</tr>
<tr>
<td>f) Refugees (on temporary protection visas)</td>
<td></td>
</tr>
<tr>
<td>g) Overseas students studying in Australia</td>
<td></td>
</tr>
<tr>
<td>h) Illegal immigrants</td>
<td></td>
</tr>
<tr>
<td>i) Workers supplied by a labour hire firm or contractor</td>
<td></td>
</tr>
<tr>
<td>j) Other (please specify) _______________________________</td>
<td></td>
</tr>
</tbody>
</table>
8 Please complete the table below to indicate the number of seasonal workers you employ in each month of the year and the type of work they are required to do.

<table>
<thead>
<tr>
<th>Month</th>
<th>Number of seasonal workers usually employed</th>
<th>Work required (e.g. pruning, thinning, picking, spraying etc)</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) January</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b) February</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c) March</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d) April</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e) May</td>
<td></td>
<td></td>
</tr>
<tr>
<td>f) June</td>
<td></td>
<td></td>
</tr>
<tr>
<td>g) July</td>
<td></td>
<td></td>
</tr>
<tr>
<td>h) August</td>
<td></td>
<td></td>
</tr>
<tr>
<td>i) September</td>
<td></td>
<td></td>
</tr>
<tr>
<td>j) October</td>
<td></td>
<td></td>
</tr>
<tr>
<td>k) November</td>
<td></td>
<td></td>
</tr>
<tr>
<td>l) December</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

9 Please indicate your level of agreement with the following statement:

I would prefer to employ the same seasonal workers each season (year after year).
Strongly agree........................................................................1
Agree......................................................................................2
Neither agree nor disagree ......................................................3
Disagree ..................................................................................4
Strongly disagree ....................................................................5

10 How do you usually employ seasonal workers? (Please circle one only.)
Directly ..................................................................................1
Via a labour hire company/contractor ........................................2
A combination of the above .......................................................3
Other (please specify) ..............................................................4

11 Generally, how easy is it for you to find sufficient seasonal workers for your enterprise? (Please circle one only.)
Finding seasonal workers is very easy ....................................1
Finding seasonal workers is fairly easy ....................................2
Finding seasonal workers is difficult .......................................3
Finding seasonal workers is impossible ...................................4
Don’t know/unsure ....................................................................5

12 Generally, how would you describe the availability of seasonal horticultural workers in your region? (Please circle one only.)
The supply of workers is plentiful ..........................................1
The supply of workers is adequate ..........................................2
The supply of workers is inadequate .......................................3
The supply of workers is extremely inadequate ......................4
Don’t know/unsure ....................................................................5

13 Overall, please describe the quality of work completed by the seasonal employees that you are currently able to recruit.
Very high ..................................................................................1
High .........................................................................................2
Average ...................................................................................3
Poor .........................................................................................4
Very poor ..................................................................................5

14 Overall, please describe the work ethic of the seasonal employees that you are currently able to recruit.
Very good ..................................................................................1
Good .........................................................................................2
Average ...................................................................................3
Poor .........................................................................................4
Very poor ..................................................................................5
15 Have you ever used the Harvest Labour Office in your nearest town to find seasonal workers? (for example, MADEC Jobs Australia Robinvale Harvest Labour Office; MADEC Jobs Australia Swan Hill Harvest Labour Office; MADEC Jobs Australia Mildura Harvest Labour Office)
Yes ................................................................. 1
No ......................................................................... 2

16 When you have used the Harvest Labour Office, generally how satisfied have you been with the outcome in terms of recruiting the number of seasonal workers you required?
Very satisfied ........................................ 1
Satisfied ............................................................. 2
Neither satisfied nor dissatisfied ......................... 3
Dissatisfied ........................................................ 4
Very dissatisfied .................................................. 5

17 When you have used the Harvest Labour Office, generally how satisfied have you been with the outcome in terms of recruiting the quality of seasonal workers you required?
Very satisfied ........................................ 1
Satisfied ............................................................. 2
Dissatisfied ........................................................ 3
Very dissatisfied .................................................. 4
Neither satisfied nor dissatisfied ............................ 5

18 In order for you to meet your labour needs is it necessary to employ illegal immigrants?
Sometimes ............................................................ 1
Often ..................................................................... 2
Always .................................................................. 3
Never .................................................................... 4

19 On what basis do you generally pay seasonal workers? (Please circle one only.)
Hourly wages ..................................................... 1
Piece rates ........................................................... 2
A mixture of hourly wages and piece rates ............ 3
Not sure - I leave it to the contractor to pay workers.. 4

20 At what rate do you generally pay seasonal workers? (Please circle one only.)
The award rate ................................................... 1
Above the award rate ........................................... 2
Below the award rate .......................................... 3
A combination of rates, depending on the worker .... 4
Not sure - I leave it to the contractor to pay workers.. 5

21 Over the next five years how many workers do you expect to employ compared to now? (Please circle one only.)
More workers than now ..................................... 1
The same number of workers as now................... 2
Fewer workers than now ..................................... 3
Don’t know/unknown .......................................... 4

22 Have seasonal labour shortages prevented you from expanding your enterprise? (Please circle one only.)
No, and they are not likely to .............................. 1
Not yet, but they are likely to in the future ............. 2
Yes, they are currently preventing expansion ........... 3
Yes, and they have prevented expanding in the past... 4
I am not interested in expanding ........................... 5

23 There have been calls to bring in seasonal workers from overseas. Please indicate how often you would be interested in employing overseas workers.
Never .................................................. Go to question 37 .......... 1
In some years ..................................................... 2
In most years .................................................... 3
Every year .......................................................... 4

24 From which one of the following regions would you most prefer to employ overseas workers? (Please circle one only.)
The Pacific Islands and/or Papua New Guinea ............. 1
Southeast Asia (Indonesia, Malaysia, Vietnam, Cambodia, Burma, Laos) ............................................. 2
China .................................................................. 3
Any country, it does not matter which one ................ 4
Elsewhere (please specify a specific country or region) ................................................................. 5

25 What is your preference in terms of the gender of overseas workers you would employ? (Please circle one only.)
Male .................................................................. 1
Female ............................................................... 2
A mix of male and female workers ....................... 3
Husband and wife teams ...................................... 4
No preference ...................................................... 5

26 What level of horticultural experience would you expect overseas workers to have? (Please circle one only.)
Extensive experience in horticulture ..................... 1
Some experience in horticulture ........................... 2
No experience in horticulture ................................ 3
27 What type of training would you be able to provide to seasonal workers brought in from overseas? (Please circle one only.)

Paid training on the job ................................................................. 1
Paid training before they started work ........................................... 2
Unpaid training before they started work ...................................... 3
Minimal or no training ................................................................. 4

28 If you were to employ seasonal workers from overseas, would you be interested in attending a half-day information session to gain a greater understanding of their culture and ways?

Yes ..................................................................................................... 1
No ....................................................................................................... 2
If no, why not?  

29 If you would be interested in employing overseas workers on a seasonal basis please indicate in the table below: when you would need workers, the number of workers needed, the duration of the work available and the major tasks to be completed by the workers.

<table>
<thead>
<tr>
<th>Month</th>
<th>Estimated number of overseas workers I would employ</th>
<th>Number of days work available in this month</th>
<th>Work required (eg pruning, thinning, picking, spraying etc)</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) January</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b) February</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c) March</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d) April</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e) May</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>f) June</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>g) July</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>h) August</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>i) September</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>j) October</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>k) November</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>l) December</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

30 What wage level would you be willing to pay overseas workers? (Please circle one only.)

Award wages .................................................................................. 1
Above award wages ........................................................................... 2
Less than award wages ..................................................................... 3
A combination of the above, depending on the individual worker ........ 4

31 In addition to paying wages, would you also be willing to provide onsite board and lodging to overseas workers?

Yes ..................................................................................................... 1
No ....................................................................................................... 2
32 If yes, what fee would you be likely to charge for onsite board and lodging? (Please circle one only.)

No charge.................................................................................................................. 1
A nominal fee of $50 per week ............................................................................. 2
A fee of between $50 and $100 per week ............................................................... 3
A fee in excess of $100 per week ........................................................................... 4
Other amount (please specify) $__________________ ............................................. 5

33 What type of accommodation could you provide for overseas seasonal workers?

<table>
<thead>
<tr>
<th>Type of accommodation</th>
<th>Number of workers that could be accommodated</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) A free-standing house</td>
<td></td>
</tr>
<tr>
<td>b) Bunk-house style accommodation</td>
<td></td>
</tr>
<tr>
<td>c) Caravans</td>
<td></td>
</tr>
<tr>
<td>d) Tents</td>
<td></td>
</tr>
<tr>
<td>e) Other (please specify) __________________________</td>
<td></td>
</tr>
</tbody>
</table>

34 Please describe the meal arrangements you could provide to overseas workers. (Please circle one only.)

Cooking facilities, utensils and food to prepare their own meals.......................... 1
Cooking facilities and utensils only........................................................................ 2
Prepared meals served in a dining room .................................................................... 3
None of the above, they would need to eat elsewhere ............................................. 4

35 A program to bring in overseas workers to fill seasonal jobs in horticulture would involve a number of administrative and practical costs, such as the cost of recruiting potential workers, arranging visas, carrying out health checks, airfares, land transport and so on. Please circle one option below to indicate how you think these costs should be recovered.

Primary producers who employ overseas workers should pay a levy.......................... 1
There should be a levy on the sale of all fruit and vegetables.................................. 2
All costs should be deducted from the overseas workers wages................................ 3
The costs should be shared between primary producers, workers and retailers......... 4
Other (please specify) __________________________________________________________ 5

36 If a levy was required in order for you to employ overseas workers, what levy would you be prepared to pay? (Please circle one only.)

Not prepared to pay a levy........................................................................................ 1
Up to $10 per worker per week ............................................................................... 2
Up to $20 per worker per week ................................................................................ 3
Up to $50 per worker per week ................................................................................ 4
Up to $100 per worker per week .............................................................................. 5
Other amount (please specify) $__________________ ............................................. 6

37 Do you have any further comments about seasonal labour needs in your area or about bringing in seasonal workers from overseas? (Please attach additional pages if necessary.)

______________________________________________________________________________

______________________________________________________________________________

______________________________________________________________________________
Contact details:

We may want to contact you to ask some follow up questions, either in person or on the phone. If you are willing to answer some follow up questions, please provide your contact details below.

Please note:

This page will be detached from all other pages of the survey and stored separately from your survey responses. Your contact details will not be passed on to anyone else.

Your answers to the survey questions will remain confidential and you will not be identified in any way in our research publications.

Name: ______________________________________
Address: ______________________________________
Telephone Number: ____________________________
Mobile phone: ________________________________
Email address: ________________________________

You have now reached the end of the questionnaire. Thank you for your time and effort.

Please return the questionnaire in the stamped addressed envelope provided.