Charles Sturt University

A scoping study of gender equality in the Australian grape and wine sector

Phase 1 Report

Regional Work and Organisational Resilience Research Group, Charles Sturt University, and Public Sector Research Group, UNSW

Acknowledgements

Charles Sturt University acknowledges all First Nations elders, both past and present, from the lands where CSU students and staff reside. In particular, CSU acknowledges the Wiradjuri, Ngunawal, Gundungarra and Biripai peoples of Australia, who are the traditional custodians of the land where the University's campuses are located. CSU also acknowledges the many First Nations peoples who are the traditional custodians of the lands in which the Australian wine industry operates.

The evaluation was commissioned by Wine Australia, in collaboration with Australian Grape & Wine's Diversity, Equality and Inclusion in Wine (DEIW) Committee.

We wish to thank all the members of the DEIW and the Advisory Group for their contributions to this report.

Preferred citation

Bamberry, L., Taylor, H., Wulff, E., Bridges, D., Williamson, S. (2024) *A scoping study of gender equality in the Australian grape and wine sector; Phase 1 Report,* Charles Sturt University & University of NSW.

ISBN
Online: 978-1-86-467472-9
Print: 978-1-86-467471-2

Contents

1 Introduction 6

1.1 Phase 1 7

2 Gender equality in the Australian wine industry 8

2.1 Existing literature 8

2.2 Industry reporting 10

3 Existing datasets 12

3.1 Australian Bureau of Statistics Census Data 12

3.1.1 State location by gender 13

3.1.2 Employment status, ownership and part-time employment 15

3.1.3 Occupational structure of employment in the wine industry 15

3.1.4 Highest level of qualification of wine industry workers 16

3.1.5 Age profile by gender of the wine industry 18

3.1.6 Income profile of men and women in the wine industry 18

3.1.7 Country of birth of men and women in the wine industry by subsector 19

3.2 Workplace Gender Equality Agency (WGEA) 20

3.2.1 Progress towards gender equality in the workforce 20

3.2.2 Leadership and representation on boards 22

3.2.3 Progress towards equal remuneration policies and reporting 23

3.2.4 Provision of flexible working arrangements, carers' and work-life balance policies and entitlements 23

3.2.5 Sex-based harassment and anti-discrimination policies 25

3.3 Galbreath reports 25

3.4 The Australian Women in Wine Survey 26

3.5 South Australian Wine Industry Incorporated 26

3.6 Higher Education sector 27

4 Challenges and limitations of existing data 29

4.1 Australian Bureau of Statistics Census Data 29

4.2 Workplace Gender Equality Agency (WGEA) 30

4.3 The Galbreath Reports 30

4.4 The South Australian Wine Industry Association 30

4.5 The Australian Women in Wine Survey 30

4.6 Key challenges: a summary 30

4.6.1 Relevance 30

4.6.2 Scope 31

4.6.3 Delivery 31

5 Next steps 32

6 References 33

Figures

Figure 3.1 Total employed by gender in grape growing and wine making 2006-2021 12
Figure 3.2 Employed in the wine industry total by State or Territory and gender 14
Figure 3.3 Wine Industry occupations by gender 16
Figure 3.4 Change in qualification levels 2006-2021 - total industry 16
Figure 3.5 Highest level of education attained by gender, wine manufacturing 17
Figure 3.6 Highest level of education attained by gender, grape growing 17
Figure 3.7 Age structure of Wine Industry, Wine Manufacture, Grape Growing and All Industries Australia . 18
Figure 3.8 Weekly Income of wine industry workers, by gender 19

Tables

Table 3.1 Percentage change in men's and women's employment in grape growing, wine manufacturing and total industry 13
Table 3.2 Proportion of men and women employed in each state and territory within the total industry 14
Table 3.3 Employment status, wine industry 15
Table 3.4 Total number of employees by industry sub sector, part-time and full-time status 15
Table 3.5 Country of birth of grape growers and wine manufacturers by gender 19
Table 3.6 Presence of gender equality policy, national, Agriculture, Beverage Manufacturing. 20
Table 3.7 Workforce gender profile, national average, Agriculture, Beverage Manufacturing 21
Table 3.8 Proportion of women in leadership roles, national, Agriculture and Beverage Manufacturing 22
Table 3.9 Policies and targets to address women's membership of boards 22
Table 3.10 Equal remuneration reporting, national average, Agriculture, and Beverage Manufacturing 23
Table 3.11 Flexible working arrangement provisions national, Agriculture and Beverage Manufacture 24
Table 3.12 Provision of policies on sex-based harassment and discrimination 25
Table 3.13 Women in senior wine roles 26
Table 3.14 Total VET students and courses 2023: program completions, gender by year 27
Table 3.15 Average and Median Salary, Males, Females, Pooled Years 28
Table 6.1 Identification of existing datasets 36
Table 6.2 Progress towards gender equality in the workplace – Individual employers 39
Table 6.3 Leadership and representation on boards – Individual employers 40
Table 6.4 Policies and progress towards equal remuneration – Individual employers 41
Table 6.5 Sex-based harassment and anti-discrimination policies – Individual employers 41
Table 6.6 Provision of flexible work arrangements, carers' and work-life balance policies and entitlements – Individual employers 42

Executive Summary

Gender equality issues persist in the wine industry, comparable with challenges in primary industries including farming and agriculture.

Academic research enables understanding of key issues including representation in leadership, which sits in tension with increasing representation of women in viticulture and oenology programs. However, academic research is surprisingly scarce and does not speak to a range of key aspects specific to women's employment in this sector.

Working towards gender equality in the sector is a strategic approach that aligns with priorities of a number of primary industries and trades. Future success is built on practices that ensure a diverse workforce, greater innovation and prosperity in the regions. Managing a diverse range of industry professionals ensures the sector is equipped with the innovators and committed advocates needed for a prosperous sector in the future.

This scoping study on gender equality in the Australian grape and wine sector aims to report on the progress the sector has made in recent years in terms of gender equity, diversity and inclusion. This study analyses available data about women's employment across a variety of roles in the industry and will investigate the lived experience of women through interviewing and focus groups. To better understand the challenges and opportunities in the sector, key stakeholder interviews will also be sought.

As numbers of women working in the sector grow, the research team with Wine Australia, Australian Grape and Wine's Diversity and Equality in Wine (DEIW) Committee and the project advisory group seek to ensure a confident understanding of how best to leverage the efforts to further grow, retain and foster the talent women bring to the sector.

1 Introduction

Gender equity has emerged as a critical issue across farming and primary industries worldwide, and as a key primary industry in Australia, the wine sector is no exception. Despite women's increasing participation in viticulture and oenology, the industry continues to grapple with significant gender disparities. In Australia, where wine production is a cornerstone of the agricultural economy, these inequities are particularly pronounced. Women in the wine sector often face barriers to career advancement, unequal pay, and underrepresentation in leadership roles. Cultural norms and stereotypes about women's capabilities in physically demanding or traditionally male-dominated fields, and women's roles as family carers, continue to hinder progress towards gender equity. Addressing these challenges is crucial for the industry's long-term sustainability and innovation potential.

In order for the sector to continue its investment and growth in profitable and sustainable winegrape and wine businesses, addressing gender equity and inclusion is essential. The sector has made significant progress in raising gender awareness, providing support and encouraging change but recognises that further evolution is needed.

The Australian grape and wine sector is a significant employer and contributor to the economy. In 2022-23 it was estimated that there were 2156 wineries in Australia and approximately 6000 grape growers across 65 wine regions in Australia (Wine Australia, 2023). They directly employ 22,673 people (ABS, 2021) and contribute indirectly to the employment of a further 163,790 people in hospitality and tourism related roles (Gillespie & Clark, 2019). Despite this significant impact, the industry has limited clarity of the current state of gender representation across the broad value chain of the industry. Well established challenges to achieving gender equity in the workplace manifest in various ways. Challenges in recruiting and retaining female talent, particularly in senior positions, lead to women's underrepresentation at higher levels and perpetuates a cycle where the next generation of women leaders lack visible role models and mentors. Traditional management practices and leadership styles within many wine businesses may inadvertently create an environment where women's contributions are undervalued or overlooked.

Narratives highlighting the impact of visibility persist throughout the agricultural sector. For example, the Invisible Farmer research project (Australian Research Council, 2022) has effectively highlighted impacts of underrepresentation and the lack of recognition of women in agriculture. The narrative of invisibility persists in rural Australian reporting, describing women as the 'invisible force' that powers Australian farms (Costello, 2018). 2024 marks 30 years since women were recognised as farmers in the Australian census (Broom, 2024); reporting highlights ongoing cultural and social barriers to rural women claiming 'farmer' as their work identity.

Addressing these systemic issues requires a comprehensive approach that encompasses fair hiring practices, retention strategies that prioritise work-life balance, equitable promotion pathways, and inclusive leadership development programs tailored to the unique challenges of the Australian wine industry. Investment in this opportunity will equip the sector with resources to understand the current state of diversity, equality and inclusion throughout the industry, and to build upon existing successes of individuals, organisations and wine businesses.

The objectives of this project are to identify how the Australian wine sector can utilise existing data as well as address gaps in understanding diversity, equity and inclusion concerns in the future. This includes the proposal of an optimum future state of data collection and analysis that complements existing wine sector workforce data collection and datasets. Collaborative research with industry will also produce a comprehensive package of strategies as an implementation toolkit for employers in all subsectors of the industry.

1.1 Phase 1

The key objective of this phase of the project is to examine existing datasets to establish how the Australian wine sector can utilise existing data as well as address gaps in knowledge about gender diversity, equity and inclusion in the sector. This will include recommendations for ongoing and future data collection and analysis practices that will enhance and mobilise insights from existing wine sector workforce data collection and datasets.

This report investigates the available gender workforce data within the grape and wine sector value chain and identifies other relevant data sources. It draws on statistical evidence from the Australian Bureau of Statistics (ABS), the Workplace Gender Equality Agency (WGEA), as well as reporting from Galbreath (2014, 2024), the Australian Women in Wine survey in 2016 and the South Australian Wine Industry Salary and Benefits Report, 2023. The report contextualises these findings in broader industry reporting and academic research, reflects on challenges and limitations of existing datasets and looks to next steps in Phase 2.

2 Gender equality in the Australian wine industry

2.1 Existing literature

The wine sector has traditionally relied upon familial as well as patriarchal social structures to produce wine. However, as Almila (2019, p. 197) notes “various changes in the processes of wine production, distribution, mediation and consumption have created new opportunities for women”. This combined with changing social expectations around gender roles at work, and university degree programs that provide a professional pathway into employment, the gendered structure of the wine workforce has radically changed. Yet research and literature about women's employment in wine growing and wine producing roles is surprisingly scarce. Most available literature focuses on women’s consumption of wine, not their employment (Bryant and Garnham, 2014; D'Amato, 2017) and largely excludes significant wine producing countries such as Spain, Germany and South Africa as well as US wine growing regions important to the industry (Livat & Jaffre, 2022).

Empirical research about the experience of Australian women in the wine sector is almost non-existent. In their comprehensive review of literature in the industry, Livatt & Jeffre (2022) are only able to cite the works of Bryant and Garnham (2014) and Galbreath (2015, 2018). Further studies by Galbreath & Tisch (2020) and Galbreath (2019), whilst about women in the wine sector in Australia, focus on the link between women’s leadership in the sector and sustainable innovation and not on women’s employment specifically. Knowledge of employment roles, leadership, management, pay rates in comparison to men, promotional opportunities, and other breakthroughs and barriers remain unexplored.

The body of literature, overall, acknowledges that the wine sector traditionally operates within patriarchal frameworks, though opportunities for women have been increasingly emerging due to changing production and societal norms (Almila, 2019). Gender discrimination arises as a recuring theme, especially in regard to hierarchical inequalities, exclusion from networks, and discriminatory norms around pregnancy and family responsibilities (Bryant & Garnham, 2014; Reynolds, 2016). Some research highlights the underrepresentation of women in leadership positions, however, there is also concern that there are overestimations of women's presence in these roles due to media narratives that focus on women in very visible roles in the sector (Galbreath, 2015; Bryant & Garnham, 2014). There is a small but growing body of literature on the compounded discrimination faced by women of colour in the wine industry (Bell et al., 2023; Ojediran et al., 2022). Instances of sexism, harassment, and misogyny are prevalent in international studies, with reports of subtle and overt harassment in male-dominated environments (Moskin, 2020; Almila, 2019).

Research in Australia points to gender discrimination in the sector with Bryant and Garnham (2014, p. 412) arguing that women regularly confront “masculine norms relating to work and hierarchical gender inequalities”. Recent media reporting also offers some insight into women’s perceptions of their work in the wine sector in Australia as well as providing much needed firsthand accounts (Reynolds, 2016; Smith et al., 2024). Articles focus on women’s successes in both wine growing and wine making as well as identifying barriers and reasons for attrition. Issues include a “misogynistic” and discriminatory culture in the industry, particularly regarding pregnancy and child rearing and a lack of motivation to build capacity to address equity, diversity, and inclusion issues. Smith et al (2024) report that the gender pay gap in winemaking and viticulture is higher than in other industries and Reynolds (2016) notes that gender bias about women’s skill and ability in wine making and growing is rampant in the sector.

There are some indications in the international literature that there is a high prevalence of gender-based discrimination and sexism in the sector that confirm media reporting in Australia. Duarte Alonso et al. (2021) notes the exclusion of women from recruitment processes and social networks in wine growing areas, and

Almila (2019, p. 205) found that women sommeliers in her study in Finland, Italy and Denmark, developed an "'attitude' in order to survive in male-dominated environments" where their gender rendered them "highly visible". This required using humour, ignoring discrimination and attempting to establish a reputation as a hard worker to gain respect. Matasar's (2006) book '*Women of Wine'* explores the evolving role of women in the wine industry across the U.S., UK, France, Italy, and Australia. Her work found that gender-based discrimination and harassment remain critical issues for women in wine with women reporting subtle and overt forms of sexism, ranging from dismissive attitudes to explicit harassment. As such, there are some reports of sexual harassment in the wine sector internationally (see Moskin, 2020).

Additionally, information about how Australia currently performs in relation to women in leadership roles in the sector also remains unclear. Internationally leadership is low, for example, the number of women lead winemakers in California is as low as 10%. In 2015 Galbreath reported that women in Australia were under-represented in wine across the board. Galbreath (2015) and Bryant and Garnham (2014) argue that the amount of women in leadership positions in the Australian wine industry are over-estimated. Gilbert and Gilbert (2012) make a similar claim about the US industry. However, there is little research internationally a decade on to confirm whether these claims are relevant today. Additionally, Galbreath (2024) reports that women's representation in wine sector roles have increased over the past decade, however, further empirical research is required to evidence the *lived* experience of women performing in these growing roles.

Recent international literature examining the experiences of Black women in the wine industry (Bell et al., 2023; Ojediran et al., 2022), highlights compounding challenges of exclusion and discrimination. Bell et al. (2023) found that racism emerged as the most predominant challenge faced by Black women in the US wine industry. Ojediran et al.'s (2022) study of Black women entrepreneurs in the South African wine industry similarly demonstrates how women of colour navigate the barriers of gender discrimination and racism to forge legitimate entrepreneurial identities in a wine sector that struggles to see them as entrepreneurs of equal skill and talent.

The literature identifies gaps in employment areas such as women's entrepreneurship, a trend that is considered influential in wine production, but where little is really known about its impact. Duarte Alonso et al (2021) contends that research and literature about women entrepreneurs in the wine industry is limited and that the trend requires further examination.

There are indications of an increase in the numbers of women in degree programs that serve the industry and that these have reached gender parity. Yet the numbers of women in work roles have not reached parity. Therefore, research about barriers that lead to attrition is required. Indeed, it has been found that participation in education can conceal how many women are working in a given industry due to a "leaky pipeline" (Blickenstaff, 2005; Makarova et al., 2016). The leaky pipeline describes specific points where women leave male-dominated education and training during their period of study and points where they leave during their careers. Another issue flagged for further investigation is the problem of media reporting that overstates women's achievements. Bryant and Garnham (2014) and Gilbert and Gilbert (2015) warn that media reporting spotlighting inspiring and successful women may skew understandings of how many women are in the industry and how well they are faring. Galbreath (2015) argues that there is a perception that women are making great strides in the wine industry but that this perception is largely anecdotal.

Insight into *how* women currently working in the industry achieve success represents a significant gap in the literature. An exception is D'Amato's (2017, p. 311) study that tested the relationship between female involvement at the head of a company in relation to the firm performance. The tested companies with low and high family involvement, in the wine industry, in Italy. They discovered that women "achieve significantly better results when they lead a family firm than when they lead a non-family firm". These findings suggest "that family businesses could represent an avenue that enables women to overcome barriers to entry into a business and to reduce constraints in exercising their job". Understanding how women's success in the sector is achieved will be an important contribution to the industry as a whole and to the field of women working in male dominated industries.

These gaps in research and literature likely contribute to inconsistencies in workforce data across the sector, obscuring industry employment trends and making it difficult to gauge, measure, and draw conclusions about the health and wellbeing of the workforce and factors that contribute to retention. The literature indicates that there are significant gaps in knowledge about women and employment in the Australian wine sector. Knowledge of employment roles, leadership, management, pay rates in comparison to men, promotional opportunities, and other breakthroughs and barriers remain unexplored. The literature indicates that there is a dearth of empirical studies on gender discrimination in the Australian wine sector, particularly around pregnancy and child-rearing biases. It is likely, but untested that the child raising years are part of the "leaky pipeline" phenomenon for women in wine. Sexism in higher education may also represent points of attrition and research in this area is highlighted in the literature as unexplored. Pay discrimination and its impact also requires further examination. Additionally, there is a gap in understanding the prevalence of sexual harassment, the impact on women's career trajectories and mental health, and strategies to alleviate the problem. Studies specifically examining the intersection of race and gender in the wine industry have been identified as minimal. This highlights the need for intersectional research approaches to explore the unique experiences of women of colour in the Australian context. There is limited research on women entrepreneurs in the wine industry specifically. Future studies should explore how women-led businesses are established and sustained, what unique challenges they face, and what factors contribute to their success or failure. Further, there is a gap in current research and literature about best practices and strategies for supporting women's entry, retention, and leadership within the sector. This includes examining mentorship, networking opportunities, and family-friendly policies that enable women to thrive.

2.2 Industry reporting

Industry reporting provides key insights that complement and extend empirical research. Recent studies offer opportunities to examine challenges and barriers to gender equality in the wine industry. The industry survey provided by the Diversity, Equality and Inclusion in Wine (DEIW) Committee (Laslett, 2023) indicate that 96% of respondents agree that there is a need to include DEI in future plans, including the One Sector and Environment, Social and Governance (ESG) plans. The survey also showed that the majority of respondents (70%) did not see sector leadership as representative of sector diversity. Asked to list their top three key DEI concerns for the wine industry, respondents mentioned increased diversity in management, executive and operational positions, work to address unconscious bias, the need for further diversity beyond gender, further professional development, gender-inclusive work environments and action against sexual harassment, equal pay and increased visibility of diversity in media representations of the wine industry. As above, we find these responses emphasise that the workforce has identified a range of challenges and locates opportunities across the value chain to understand and address these challenges.

Contributions from The Fabulous Ladies' Wine Society and Australian Women in Wine (Thompson, 2016) detailing an Australia-wide survey in 2016 provide foundational examinations of gender equality, highlighting a number of barriers that align with insights discussed above, including concerns around the gender pay gap and sexist behaviour. Findings from this survey are further discussed below as an existing dataset and demonstrate a clear need for further evidence-based research. Further context is provided as part of the Meininger's Wine Business International study (Port, 2016), which extends and compares these findings in a global context.

Siobhan Wigan's (2023) report on factors that impact the advancement of women working in production roles in the wine industry surfaces key insights into the underrepresentation of women, particularly in more senior roles and production roles. Survey and interview data offer an updated sense of the sector, indicating that retention of women in production continues to be a key challenge. Findings highlight poor culture, gender bias and limits to flexible working options as contributing factors to underrepresentation.

Wine Australia reports that there are 2156 wineries and approximately 6000 grape growers in Australia. The wine industry directly employs 22,673 people (ABS, 2021) and Wine Australia estimates that the industry

contributes indirectly to the employment of a further 163,790 people in full and part-time positions (Gillespie & Clark, 2019). This estimate includes those employed indirectly in the wine tourism sector. This data can only be estimated given there is no specific tourism industry sector in the Australian and New Zealand Standard Industrial Classification (ANZSIC) (Gillespie and Clarke 2019). Similarly, the ANZSIC codes do not allow for disaggregation of wholesale or retail data for wine sales and distribution, as distinct from alcohol sales more generally. As a result, industry reports tend to focus on data that relates specifically to grape growing and wine manufacturing. This report relies on this definition of the wine industry as grape growing and wine manufacturing, but acknowledges that there is a need to develop workforce data that incorporates the broader sales and distribution subsectors of the industry.

3 Existing datasets

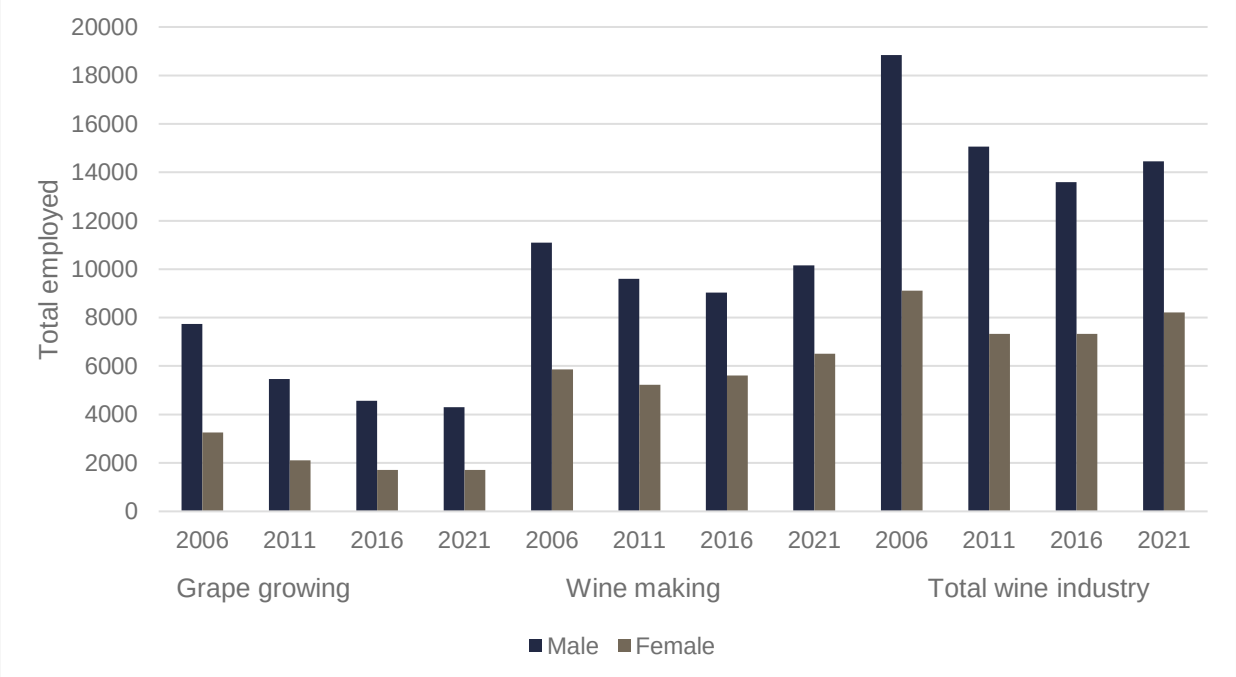
This section outlines national and industry datasets and presents data related to wine sector employment[1].

3.1 Australian Bureau of Statistics Census Data

ABS Census data is collected every 5 years and provides a detailed snapshot of the state of employment within the industry at that time. In 2021, the census identified a total of 22,673 people employed in grape growing and wine manufacturing. Of these 8220 (36%) were women and 14,452 (64%) were men.

Figure 3.1 below compiles data from the 2006, 2011, 2016 and 2021 censuses, showing the trend in the numbers of women and men employed in grape growing and wine manufacturing over this period. The data shows that within the grape growing subsector there has been a consistent decline in both men and women workers over the 15 year period. For men in this subsector, there has been a 45% decline, while for women there has been a 47% decline over the 15 years. As a result, the gender balance has shifted to become slightly more male dominated from 70% male and 30% female in 2006 to 71% male and 29% female in 2021. The factors that have contributed to this decline may be explored in more detail through the collection of qualitative data in phase two of the project.

Figure 3.1 Total employed by gender in grape growing and wine making 2006-2021



Source: ABS Census of Population and Housing 2021, Tablebuilder

Within the wine making subsector, there has been a 13% decline in employment between 2006 and 2011, with a further 1% decline in 2016, rebounding to 14% growth between 2016 and 2021, as shown in Table 3.1

[1] Review Appendix A for a summary table which provides details on data types, parameters, application of study and limitations to data.

below. The decline from 2006 had a more significant impact on men's employment (14% decline to 2011 and 6% decline to 2016) compared to women's employment (11% decline to 2011). By 2016 women's employment had seen a rebound, with growth of 8%, and further growth of 16% between 2016 and 2021, although it should be noted that this percentage growth is from a small base, and the total growth in women's employment from 2006 to 2021 represents only 652 jobs. In contrast, the 12% growth in men's employment between 2016 and 2021 resulted in 1121 new positions. Given these changes the gender balance has shifted slightly from 65% male, 35% female in 2006 to 61% male to 39% female in 2021.

Table 3.1 Percentage change in men's and women's employment in grape growing, wine manufacturing and total industry

	Male Percentage change	Female Percentage change	Persons Percentage change
Grape growing			
change 2006-2011	-29%	-35%	-31%
change 2011-2016	-16%	-19%	-17%
change 2016-2021	-6%	0%	-4%
change 2006-2021	*-45%*	*-47%*	*-45%*
Wine manufacturing			
change 2006-2011	-14%	-11%	-13%
change 2011-2016	-6%	8%	-1%
change 2016-2021	12%	16%	14%
change 2006-2021	*-9%*	*11%*	*-2%*
Total industry			
change 2006-2011	-20%	-20%	-20%
change 2011-2016	-10%	0%	-6%
change 2016-2021	6%	12%	8%
change 2006-2021	*-23%*	*-10%*	*-19%*

Source: ABS Census of Population and Housing 2021, Tablebuilder

3.1.1 State location by gender

The highest proportion of the wine workforce (39%) is located in South Australia, (41% of all men and 37% of all women). While men dominate the workforce in all states and territories, the distribution of men and women across each state or territory is proportional to the total distribution of the workforce with 26% of all men and all women located in Victoria and slightly higher proportions of women located in NSW (19% women compared to 17% of men), Western Australia (10% of women compared to 9% of men) and Queensland (4% of women compared to 3% of men). Equal proportions of men and women are located in Tasmania (4% of all women, 4% of all men).

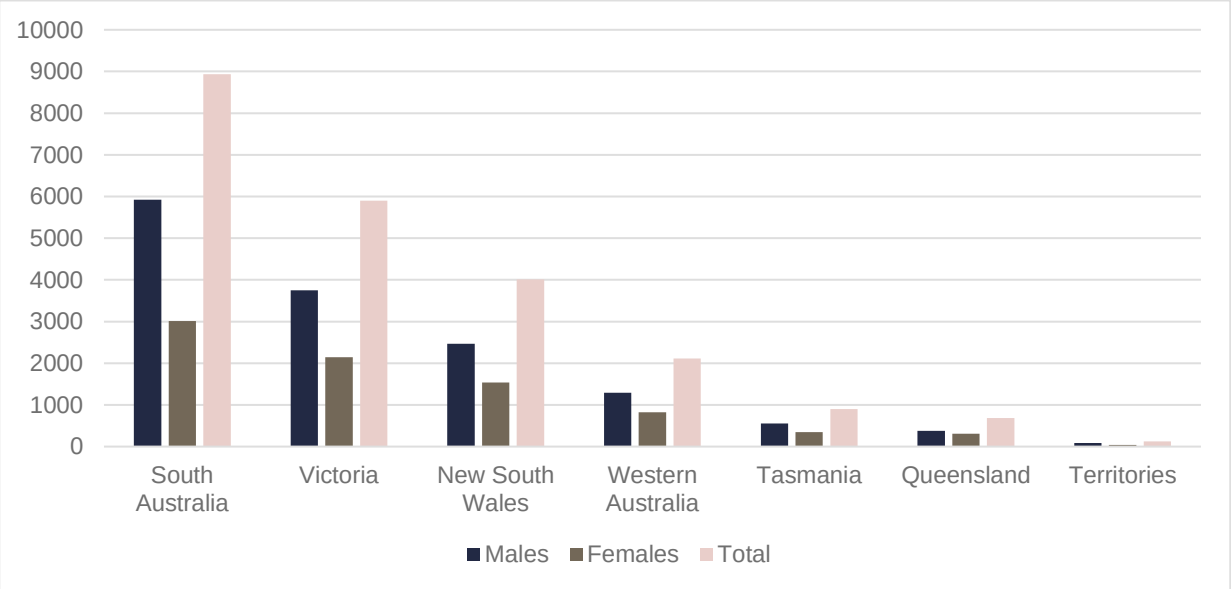
Table 3.2 Proportion of men and women employed in each state and territory within the total industry

	Total	Male	Female
South Australia	39%	41%	37%
Victoria	26%	26%	26%
New South Wales	18%	17%	19%
Western Australia	9%	9%	10%
Tasmania	4%	4%	4%
Queensland	3%	3%	4%
ACT, NT and other Territories	0.5%	1%	0.5%

Source: ABS Census of Population and Housing 2021, Tablebuilder (note rounding of data may result in totals less or greater than 100%).

The gap between men's and women's employment in the wine industry is highest in the Territories (includes ACT, NT and offshore territories), where 70% of the workforce are men, although overall numbers of workers in the territories are relatively small at less than 100 employees. In South Australia 66% of the wine industry workforce are men, while in Victoria 64%, and NSW 62% of the workforce are men. Tasmania and Western Australia both have a male workforce of 61%, while in Queensland 56% of the workforce are men.

Figure 3.2 Employed in the wine industry total by State or Territory and gender



Source: ABS Census of Population and Housing 2021, Tablebuilder

Analysis of the change in employment by state over the period from 2006 to 2021 shows that all states have shared relatively equally in the decline of employment in grape growing, except Tasmania which has seen 22% growth in grape growing employment. Similarly, Tasmania is the only state to have experienced significant growth in employment in wine making with 79% growth in men's employment and 153% growth in women's employment, although once again it should be noted that these growth rates are from small bases, with men's employment growing from 204-365 jobs and women's employment growing from 100 to 253

positions. As a result, the gender balance in Tasmania in 2021 was 59% male to 41% female, while across all other states and territories it has remained relatively stable.

3.1.2 Employment status, ownership and part-time employment

Table 3.3 shows the status in employment of men and women in the total wine industry. Women are notably under-represented in the group of owner managers: women comprise 31% of owner managers with employees and 28% of owner managers without employees, compared to 36% of all workers. Women are also over-represented amongst employees (37%) and contributing family workers (40%). Workers classified as employees are more likely to be spread throughout the occupational structure of the workforce (see section *3.1.3 Occupational structure of employment in the wine industry* below), suggesting that women may be less concentrated in managerial and leadership roles. Equally, contributing family members provide their labour to the employer without payment. Women's over-representation in these categories contributes to the gender pay gap within the wine industry, as well as their under-representation in leadership roles.

Table 3.3 Employment status, wine industry

Status in employment	Males	Females
All workers	64%	36%
Employee	63%	37%
Contributing family worker	60%	40%
Owner manager with employees	69%	31%
Owner manager without employees	72%	28%
Not stated	74%	26%

Source: ABS Census of Population and Housing 2021, Tablebuilder (note rounding of data may result in totals greater than 100%).

Across the industry 41% of women work part-time, with a higher proportion of women in the grape growing sector working part-time (49%) than within the manufacturing sub-sector (39%). However, a higher proportion of women in the manufacturing sub-sector are likely to be away from work (9%) which may suggest that caring responsibilities have an impact.

Table 3.4 Total number of employees by industry sub sector, part-time and full-time status

	Grape Growing			Wine Manufacture			Total industry		
	Male	**Female**	**Total**	**Male**	**Female**	**Total**	**Male**	**Female**	**Total**
Employed, worked full-time	71%	44%	63%	77%	52%	67%	75%	51%	66%
Employed, worked part-time	25%	49%	32%	19%	39%	27%	21%	41%	28%
Employed, away from work	4%	6%	5%	5%	9%	6%	4%	8%	6%

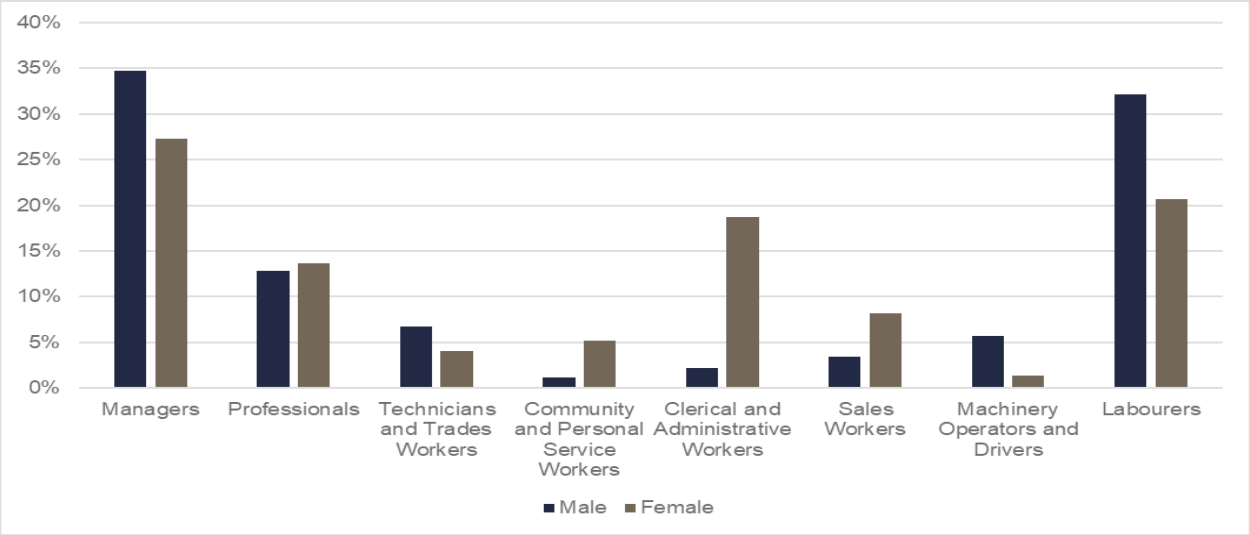
Source: ABS Census of Population and Housing 2021, Tablebuilder (note rounding may result in totals less than 100%)

3.1.3 Occupational structure of employment in the wine industry

Across the wine industry as a whole, men are more likely to be managers, technicians, machinery operators and drivers and labourers than women, while women are more likely to be clerical and administrative

workers and professionals. While more than a quarter of all women are in leadership roles, this is lower than the 34% of men who are in management roles.

Figure 3.3 Wine Industry occupations by gender

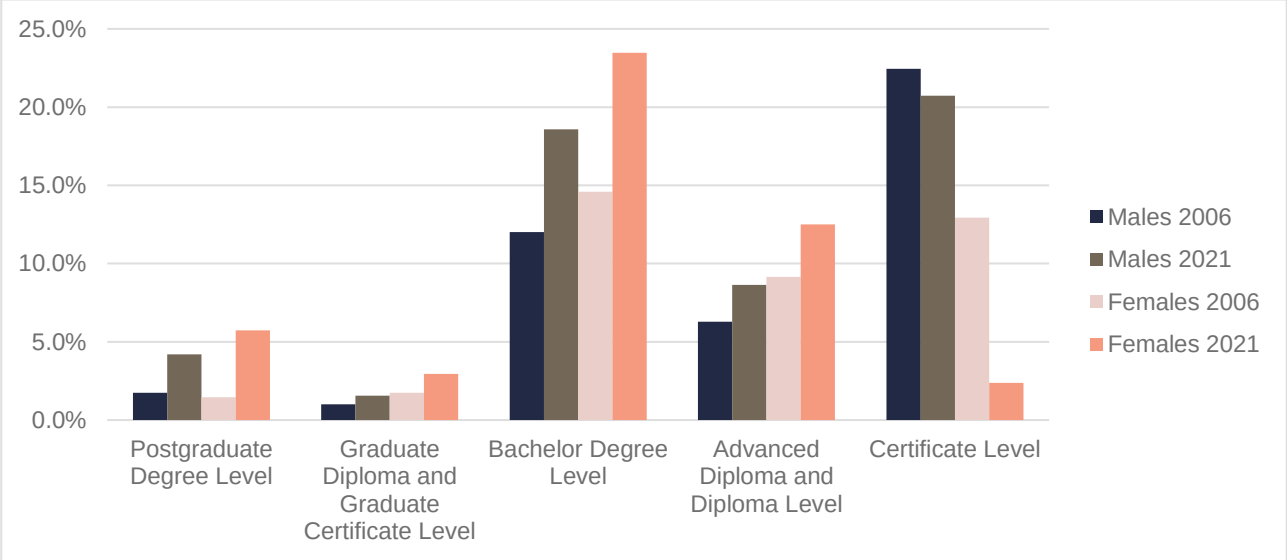


Source: ABS Census of Population and Housing 2021, Tablebuilder

3.1.4 Highest level of qualification of wine industry workers

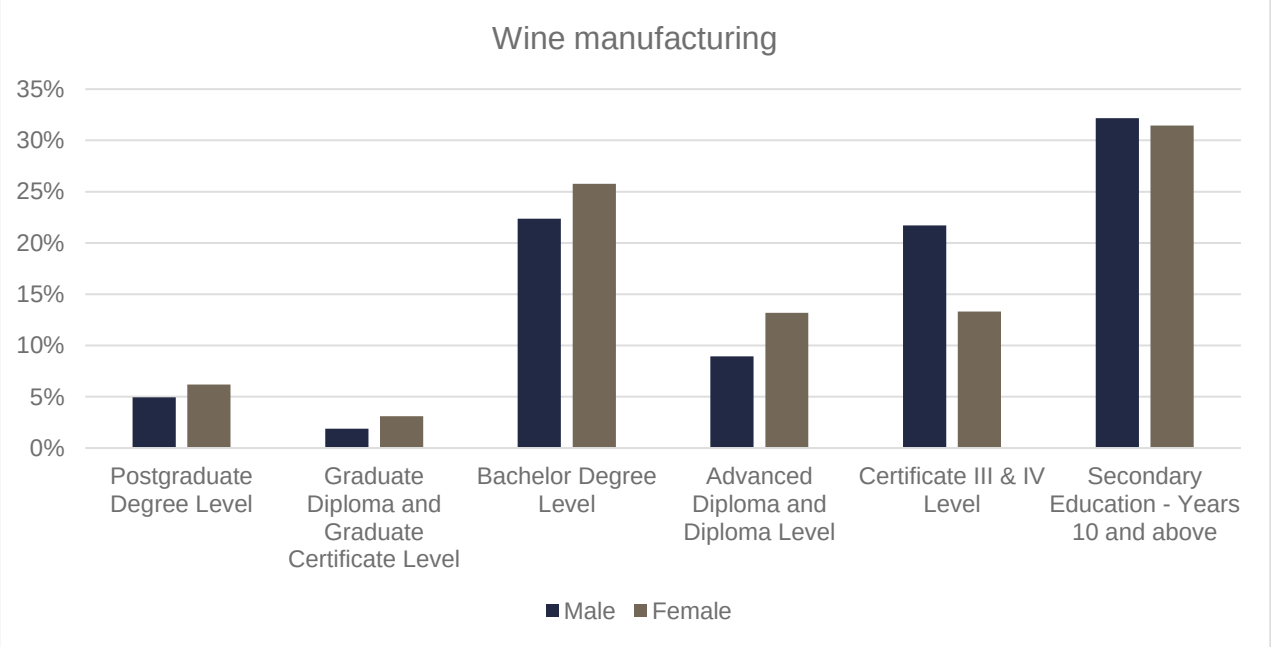
The most significant change in qualifications within the wine industry between 2006 and 2021 has been the overall increase of both men and women with post school qualifications. Men with post school qualifications have risen from 44% to 54%, while women have risen from 40% having post school qualifications to 47%. Amongst those who have post school qualifications, there has been a significant decrease in the proportion of women holding certificate level qualifications and significant increases in all other qualification levels, but particularly Bachelor Degree level qualifications. This trend is similar for men, although the proportion of men with certificate level qualifications remains high.

Figure 3.4 Change in qualification levels 2006-2021 - total industry



In 2021, women were over-represented amongst those with higher qualifications across the wine industry. This is more pronounced in the wine manufacturing subsector than in the grape growing sector, particularly in bachelor and post-graduate level qualifications. In both subsectors, men tend to be concentrated in trade qualifications, such as certificates level 3 and 4.

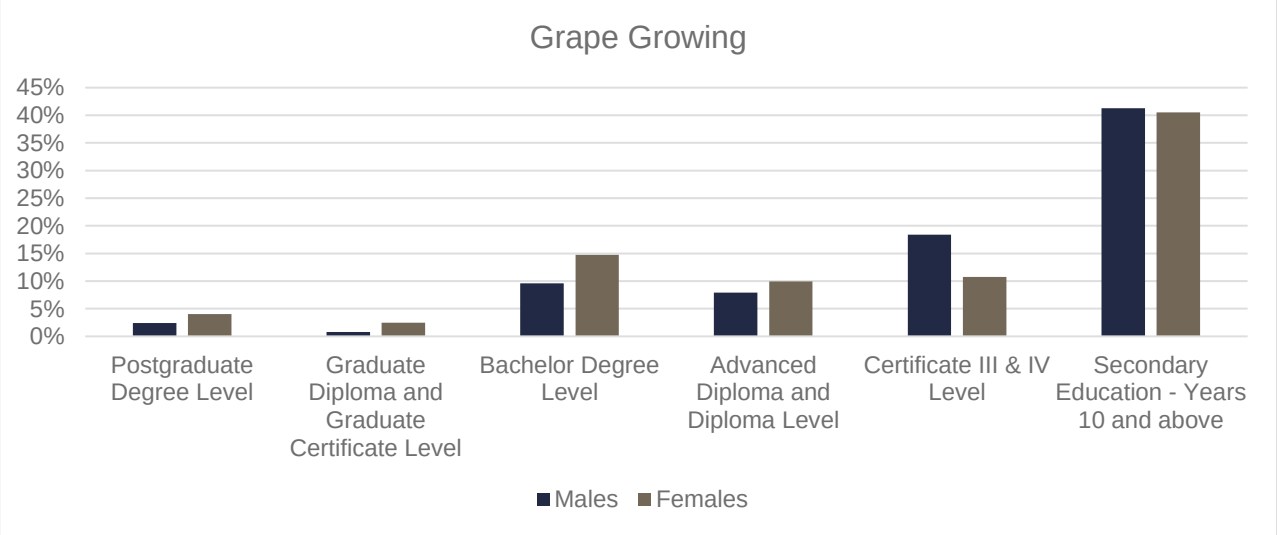
Figure 3.5 Highest level of education attained by gender, wine manufacturing



Source: ABS Census of Population and Housing 2021, Tablebuilder

While the overall shape is similar between the two subsectors, wine manufacturing tends to show a more skilled profile compared to the grape growing profile.

Figure 3.6 Highest level of education attained by gender, grape growing



Source: ABS Census of Population and Housing 2021, Tablebuilder

3.1.5 Age profile by gender of the wine industry

The age structure of the wine industry overall, and the grape growing subsector in particular, show a strongly ageing workforce compared to the overall workforce in Australia. The ageing of the grape growing workforce is a significant trend and may be of concern for the industry in the long-term.

Both wine making and grape growing manifest a significant parenthood decline in participation, compared to the overall workforce, and this is more pronounced for women than men. It is also notable that in the wine manufacturing subsector women's participation appears to rebound more rapidly than in the grape growing subsector after the key childbearing years of 35-39.

Figure 3.7 Age structure of Wine Industry, Wine Manufacture, Grape Growing and All Industries Australia

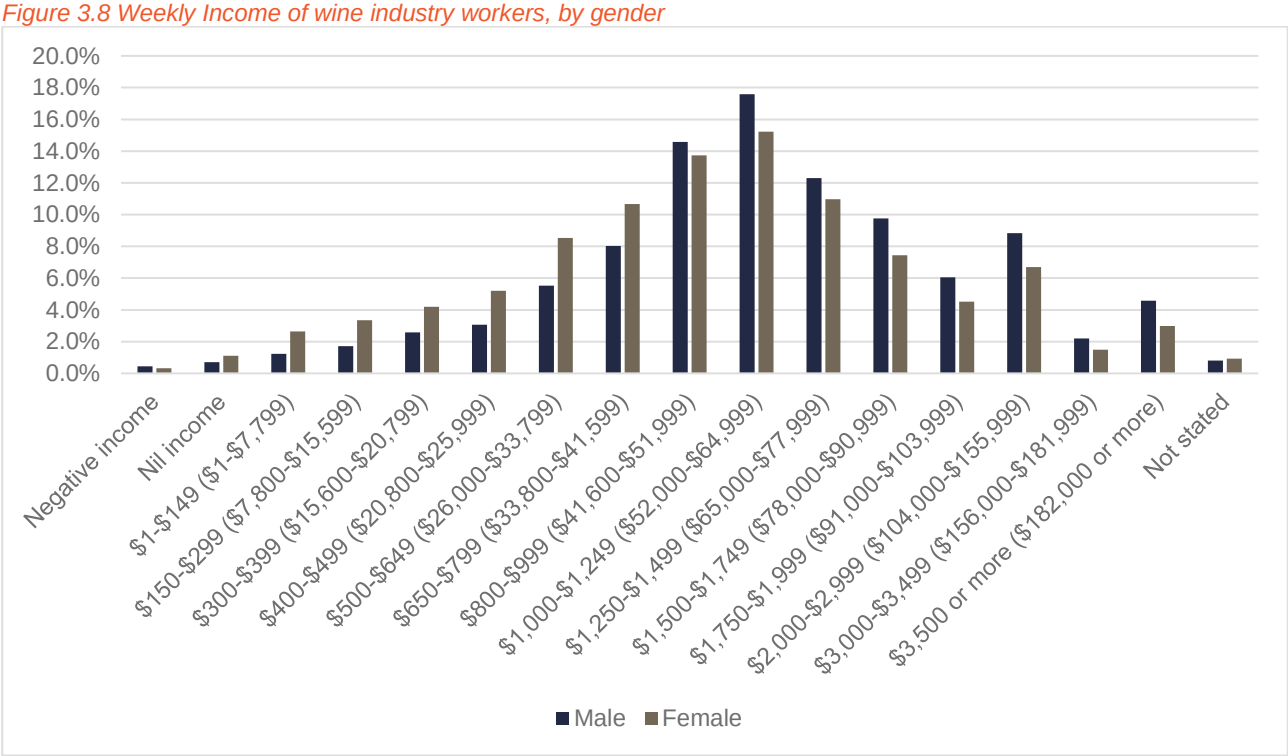


Source: ABS Census of Population and Housing 2021, Tablebuilder

3.1.6 Income profile of men and women in the wine industry

The median income group appears to be at $1000-$1249 per week. Women are over-represented in each of the income groups below $800 per week and under-represented in all income groups greater than $800 per week. This may relate to levels of part-time work amongst women, but also the occupational structure shown in Figure 3.3 above.

Figure 3.8 Weekly Income of wine industry workers, by gender



Source: ABS Census of Population and Housing 2021, Tablebuilder

3.1.7 Country of birth of men and women in the wine industry by subsector

Women in the wine industry as a whole appear to be more culturally diverse than men. This is particularly the case amongst grape growers, where almost 30% of all workers were born in a country outside the Oceania region. As at 2021, 21% of women grape growers were from Asia, while a further 9% were from Europe.

Table 3.5 Country of birth of grape growers and wine manufacturers by gender

	Grape growers			Wine manufacturers			Total industry		
	Male	**Female**	**Total**	**Male**	**Female**	**Total**	**Male**	**Female**	**Total**
Oceania	76%	67%	73%	83%	78%	81%	80%	76%	79%
Europe	7%	9%	7%	8%	10%	9%	8%	10%	8%
Asia	13%	21%	15%	6%	8%	7%	8%	10%	9%
Americas	1%	1%	1%	1%	2%	1%	1%	2%	2%
Sub-Saharan Africa	1%	1%	1%	1%	1%	1%	1%	1%	1%
Not stated	1%	1%	1%	2%	1%	1%	1%	1%	1%
	99%	100%	100%	100%	99%	99%	100%	100%	100%

Source: ABS Census of Population and Housing 2021, Tablebuilder

3.2 Workplace Gender Equality Agency (WGEA)

WGEA is a Commonwealth government agency established by the *Workplace Gender Equality Act 2012*. Its purpose is to promote and improve gender equality (including equal remuneration between women and men) in employment and in the workplace. WGEA collects workplace data from employers with 100 or more employees annually to measure progress against six gender equality indicators, namely:

- Gender composition of the workforce
- Gender composition of governing bodies of relevant employers
- Equal remuneration between women and men
- Availability and utility of employment terms, conditions and practices relating to flexible working arrangements for employees and to working arrangements supporting employees with family or caring responsibilities
- Consultation with employees on issues concerning gender equality in the workplace
- Sexual harassment, harassment on the ground of sex or discrimination.

Given that only larger employers are required to report to WGEA on their progress, data that relates to employers in the wine industry is limited. The wine industry is strongly based on small to medium operators and family-based operations that have generally been excluded from the reporting requirements. Larger firms with 100 or more employees are generally more likely to have Human Resource departments with gender equity strategies than smaller or medium-sized enterprises and so are more likely to perform well against the gender equality indicators provided.

WGEA does provide a data explorer portal which allows analysis on an industry basis, facilitating the capture of data for the broader agriculture and beverage and tobacco manufacturing industries. However, it is not possible to disaggregate this data further to grape growing or wine manufacturing specifically. The following summary data is based on these broader industries. Care must be taken in interpreting this data given that it is drawn from a range of larger employers from the broader industries[2].

3.2.1 Progress towards gender equality in the workforce

Table 3.6 provides an overview of how major employers within the Agriculture and Beverage Manufacturing sub-sectors are performing on the presence of gender equality policies in the workplace compared to the overall national average for all industries. While beverage manufacturing employers are performing better than the national average on including gender equality in performance management, promotion, retention, succession planning and talent identification processes, the Agriculture sector is behind the national average on all measures.

Table 3.6 Presence of gender equality policy, national, Agriculture, Beverage Manufacturing.

Primary Measure	Secondary Measure	National	Agriculture	Beverage and Tobacco Product Manufacturing
Policy to support gender equality in the workplace?		**79%**	58%	68%
Gender equality policy inclusions	KPIs for managers	**38%**	10%	27%
	Performance management processes	**86%**	68%	91%

[2] The performance of individual companies can also be identified through the WGEA data explorer portal. Appendix B provides a summary of the achievement of these key measures of gender equality by leading employers in the wine industry.

Promotions	**73%**	55%	86%
Recruitment	**89%**	71%	77%
Retention	**70%**	42%	77%
Succession planning	**72%**	52%	73%
Talent identification	**73%**	55%	77%
Training and development	**87%**	58%	77%

Source: WGEA Data Explorer (https://www.wgea.gov.au/data-statistics/data-explorer) (note rounding may result in totals other than 100%)

Table 3.7 provides a breakdown of the gender profile of the major employers in Agriculture and Beverage Manufacturing compared to the national average. Both Agriculture and Beverage Manufacturing are more male-dominated than the national average. Of note, women in both sectors are more likely to be employed full-time, although the proportion of women employed casually in the agriculture sector is almost twice the national average while the proportion of women employed part-time is significantly lower than the national averages. This may indicate that the availability of part-time or flexible work is limited and that women are choosing casual employment in order to achieve a more flexible balance between work and caring responsibilities.

It is also notable that appointments and promotions in both Agriculture and Beverage manufacturing are significantly higher for men than women and this gender disparity is greater than the national average, which contributes to the ongoing male-dominance within the industry subsectors. Similarly, the proportion of men resigning from employers in these industries is significantly higher than the national averages (60-63%), although the high level of male resignations may reflect the male dominated nature of the industry subsectors where 63-67% of employees are men.

Table 3.7 Workforce gender profile, national average, Agriculture, Beverage Manufacturing

Primary Measure	Secondary Measure	National	Agriculture	Beverage and Tobacco Product Manufacturing
Percentage of employees	Women	51%	37%	34%
Percentage of women	Full-time	43%	45%	71%
	Part-time	30%	9%	12%
	Casual	28%	46%	17%
Percentage of appointments	Women	53%	40%	36%
	Men	47%	60%	64%
Percentage of promotions	Women	47%	36%	35%
	Men	53%	64%	65%
Percentage of resignations	Women	54%	40%	37%
	Men	46%	60%	63%

Source: WGEA Data Explorer (https://www.wgea.gov.au/data-statistics/data-explorer) (note rounding may result in totals other than 100%)

3.2.2 Leadership and representation on boards

In terms of leadership, table 3.8 presents details of the proportion of women in leadership roles, showing that both Agriculture and Beverage manufacturing are significantly below the national average for the proportion of these positions that are held by women. Table 3.9 provides details of the existence of policies or targets to support the presence of women on the Boards of companies nationally and in the Agriculture and Beverage Manufacturing sectors. In both the Agriculture and Beverage Manufacturing sectors the reporting employers are behind the national standards (which are in themselves disappointingly low) for proactive policies or quotas for women on boards. Perhaps as a consequence, women's representation in these key leadership roles remains woefully inadequate.

Table 3.8 Proportion of women in leadership roles, national, Agriculture and Beverage Manufacturing

Primary Measure	Secondary Measure	National	Agriculture	Beverage and Tobacco Product Manufacturing
Percentage of managers	Women	42%	23%	31%
Percentage of non-managers	Women	52%	39%	35%
Percentage of CEOs	Women	22%	3%	5%
Percentage of Heads of Business	Women	30%	27%	41%
Percentage of Key Management Personnel	Women	37%	29%	33%

Source: WGEA Data Explorer (https://www.wgea.gov.au/data-statistics/data-explorer) (note rounding may result in totals other than 100%)

Table 3.9 Policies and targets to address women's membership of boards

Primary Measure	Secondary Measure	National	Agriculture	Beverage and Tobacco Product Manufacturing
Policy to support gender equality in composition of board?		29%	16%	18%
Target set to increase the representation of women on board?		13%	10%	9%
Percentage of board members (including Chairs)	Women	31%	19%	26%
	Men	69%	81%	74%
Percentage of board Chairs	Women	19%	14%	7%
	Men	81%	86%	93%

Source: WGEA Data Explorer (https://www.wgea.gov.au/data-statistics/data-explorer) (note rounding may result in totals other than 100%)

3.2.3 Progress towards equal remuneration policies and reporting

Table 3.10 below provides a broad-brush comparison of the proportions of employers nationally, compared to those in Agriculture, and Beverage Manufacturing. Overall, the Beverage Manufacturing employers in this sample are performing better on the development of equal pay policies, analysis of pay gaps and responsive action than the national average, while the Agriculture sector is less advanced than the national average. However, both Agriculture and Beverage manufacturing have significantly lower pay gaps than the national average, although this may be due to lower levels of pay overall in these industries compared to the national average (Preston & Jefferson, 2007).

Table 3.10 Equal remuneration reporting, national average, Agriculture, and Beverage Manufacturing

Primary Measure	Secondary Measure	National	Agriculture	Beverage and Tobacco Product Manufacturing
Policy or strategy on equal remuneration?		70%	65%	77%
Conducted a remuneration gap analysis?		55%	42%	68%
Taken actions as a result of remuneration gap analysis?		60%	54%	87%
Average base salary gender pay gap (All employees)		17.2%	10.6%	3.5%
Average total remuneration gender pay gap (All employees)		21.7%	12.0%	7.4%
Median base salary gender pay gap (All employees)		14.5%	4.1%	7.8%
Median total remuneration gender pay gap (All employees)		19.0%	6.5%	13.0%
Percentage of total workforce	Women	51%	37%	34%
	Men	49%	63%	66%
Percentage of upper quartile (total remuneration)	Women	35%	27%	30%
	Men	65%	73%	70%
Percentage of upper-middle quartile (total remuneration)	Women	52%	38%	28%
	Men	48%	62%	72%
Percentage of lower-middle quartile (total remuneration)	Women	57%	42%	36%
	Men	43%	58%	64%
Percentage of lower quartile (total remuneration)	Women	60%	42%	42%
	Men	40%	58%	58%

Source: WGEA Data Explorer (https://www.wgea.gov.au/data-statistics/data-explorer) (note rounding may result in totals other than 100%)

3.2.4 Provision of flexible working arrangements, carers' and work-life balance policies and entitlements

Table 3.11 provides details of the provision of policies and entitlements to support workers with families and caring responsibilities and work-life balance. While both Agriculture and Beverage Manufacturing are performing as well as the national average on access to key flexible work options such as flexible hours of

work, time in lieu, telecommuting, access to part-time work, and unpaid leave, their performance on employer funded parental leave is below national standards. It is also worth noting that although 97%-100% of employers reporting in these sectors have a policy on access to part-time work, the take up rate for part-time work, as shown in table 3.5, is only 9% in Agriculture and 12% in Beverage manufacturing. While the provision of workplace policies is an important step in encouraging workplace gender equity, this evidence also needs to be read within the context of the data on the take-up and use of such employment provisions.

Table 3.11 Flexible working arrangement provisions national, Agriculture and Beverage Manufacture

Primary Measure	Secondary Measure	National	Agriculture	Beverage and Tobacco Product Manufacturing
Employer funded paid parental leave is provided?	Universally available	21%	23%	18%
	Using primary / secondary carer labels	42%	19%	50%
	No	36%	58%	32%
How many weeks (minimum) of employer funded paid parental leave is provided?	Primary carers or universally available	12 weeks	13.8 weeks	13.3 weeks
	Secondary carers	3 weeks	3 weeks	2.5 weeks
How many months is the qualifying period for employer funded paid parental leave?	Primary carers or universally available	11 months	10.8 months	10.1 months
	Secondary carers	10.5 months	12 months	10.3 months
Superannuation contributions paid to carers while they are on parental leave?	Primary carers or universally available	85%	78%	80%
	Secondary carers	86%	80%	88%
Percentage of paid parental leave taken by women?	Primary carers or universally available	86%	100%	78%
	Secondary carers	5%	3%	1%
Percentage of paid parental leave taken by men?	Primary carers or universally available	14%	0%	22%
	Secondary carers	95%	97%	99%
Policy on flexible working arrangements?		84%	55%	77%
Flexible working options	Flexible hours of work	97%	100%	95%
	Compressed working weeks	59%	52%	55%
	Time-in-lieu	94%	97%	100%
	Telecommuting (e.g. working from home)	95%	97%	100%
	Part-time work	98%	97%	100%
	Job sharing	66%	65%	64%
	Purchased leave	42%	45%	32%
	Unpaid leave	99%	100%	100%
Policy to support employees who are experiencing family or domestic violence?		81%	65%	86%

Source: WGEA Data Explorer (https://www.wgea.gov.au/data-statistics/data-explorer) (note rounding may result in totals other than 100%)

3.2.5 Sex-based harassment and anti-discrimination policies

While the Agriculture and Beverage Manufacturing employers reporting to WGEA are performing relatively well on the provision of policies and processes for managing grievances, their performance on training processes is currently less than 100%. Given the recent changes to legislation that require employers to pro-actively work towards preventing discrimination and sex-based harassment, this lack may leave employers exposed in terms of national employment law.

Table 3.12 Provision of policies on sex-based harassment and discrimination

Primary Measure	National	Agriculture	Beverage and Tobacco Product Manufacturing
Policy on sex-based harassment or discrimination?	98%	97%	100%
Policy includes a grievance process?	97%	100%	100%
Training for managers on sexual harassment or discrimination?	89%	97%	95%

Source: WGEA Data Explorer (https://www.wgea.gov.au/data-statistics/data-explorer) (note rounding may result in totals other than 100%)

3.3 Galbreath reports

The Galbreath reports compiled data in 2014 and 2024. The research sought to determine the representation of women in various occupations and positions in the Australian sector. Data is drawn from the process of identifying women's names within The Australian and New Zealand Wine Industry Directory published by Australian media company Winetitles. Galbreath has matched names with the roles of CEO (or equivalent), winemaker, viticulturist and marketing. As well as matching women's names against employment roles in the Winetitles directory both studies also coded names and roles against their respective states and captured variables about the wineries where women were work i.e., 'winery age, winery size and export orientation'.

Galbreath has published two studies that use this method. Study one, published in 2015, recorded women's representation across 2007–2013 – a seven-year period. Study two, published in 2024 recorded women's representation in the period of 2021–2023 – a three-year period.

For the purposes of the later study Winetitles provided a special-order database that included additional information to the Directory i.e., personnel titles (roles) and the names of individuals in these titles.

Employment categories covered by Galbreath include CEO (including Director, General Manager, Managing Director, Managing Partner and Proprietor), winemaker, viticulturist and marketing positions. The combined studies, based on this method, show that:

- Women in leadership roles i.e., CEO or equivalent, in Australian wineries, have increased from 10 – 12% in 2013 to 2023 to approximately 22% in 2023.
- Numbers of women in the wine making role have increased from 8.8% in 2013 to 16.7% in 2023, showing an increase of 7.9 percentage points.
- Numbers of women viticulturists have increased from 10% in 2013 to 21.5% in 2023, showing an increase of 11.5 percentage points.

- Women in 2021-2023 comprise 58.4% of marketing roles, as compared to 53.5% in the 2007-2013 time period, constituting a small rise in numbers.

Table 3.13 Women in senior wine roles

All States

Percentage of Women by Role			
Sample with year ending 2013		**Sample with year ending 2023**	
	Percent		Percent
Women CEOs	12.7	**Women CEOs**	33.7
Women winemakers	8.8	**Women winemakers**	16.7
Women viticulturists	10.0	**Women viticulturists**	21.5
Women marketers	53.5	**Women marketers**	58.4
Number of wineries	2,394 (average)	**Number of wineries**	2,190

Source: Galbreath 2014; 2024

3.4 The Australian Women in Wine Survey

The Australian Women in Wine surveys, conducted in 2015 and 2016 highlighted progress and challenges for women in the industry. The surveys gathered data on the perceptions and experiences of 279 respondents in 2015 and 274 in 2016; collecting demographic data and focusing on the experiences of women working in wine related roles. The 2015 survey revealed significant issues around gender-based discrimination and the underrepresentation of women in key roles. It found that many women in the wine sector faced discriminatory behaviour, including sexism, and struggled to achieve career advancement in male-dominated areas like winemaking and viticulture.

The 2016 survey by the Australian Women in Wine Awards (AWIWA) focused on four key areas: pay, maternity and childcare, sexist behaviour in the workplace, and career advancement. Key findings highlight issues in the sector with 42% of respondents reporting that they believed that they were paid less than male colleagues undertaking a comparable role. A further 25% experienced unfair treatment related to pregnancy or childcare and 18% felt denied equal career progression opportunities. Concerningly, 67% said they encountered sexism at work.

3.5 South Australian Wine Industry Incorporated

The 2023 Wine Industry Salary and Benefits Report provides an annual industry-specific report with updated salaries across the value chain in the wine industry. Thirty-nine South Australian companies participated in the 2023 survey; participation is voluntary and so varies from year to year. The Report has a gender demographic and in 2023, 37.8% of respondent Industry staff were women (p.11).

The Report is particularly valuable in supplying numbers of casual and part time employees in 'vintage only' and 'non-vintage' positions (p.9,10). The number of part time and casual employees during 'vintage only' periods are substantially higher (1229) (p.10) than the number of part time and casual employees during 'non-vintage only' periods (523) which also has the greater number of full-time employers overall (5229 vs 157) (p.9,10).

3.6 Higher Education sector

Wine science and viticulture courses are offered at vocational education and training (VET) and Higher Education (HE) or university levels at a range of institutions across Australia.

Data from the National Centre for Vocational Education Research (NCVER) is available on the total number of program completions by VET students between 2019 and 2023. In this period, there were approximately 590 completions in wine industry operations, wine technology and viticulture across Australia. These included certificates II and III in Wine Industry Operations and Diplomas of Wine Technology and Viticulture. Overall, 60% of completions were by men, while 40% were women. At the certificate level 59% were men, and 41% women, while at the diploma level 67% were men compared to 33% women.

Caution should be taken in interpreting this data given the small overall numbers. In order to avoid releasing data that may be identifiable, numbers of participants in small cell sizes have been replaced with percentage data. It should be noted that a minor change in numbers of completions may suggest a significant proportional change.

Table 3.14 Total VET students and courses 2023: program completions, gender by year

		Year					
Program		2019	2020	2021	2022	2023	Total 2019-2023
Certificate II or III in Wine Industry Operations	Male	75%	82%	39%	55%	72%	295
	Female	25%	18%	61%	45%	28%	205
	Total	60	55	140	155	90	500
Diploma of Wine Technology or Diploma of Viticulture	Male	67%	50%	83%	50%	67%	60
	Female	33%	50%	17%	50%	33%	30
	Total	15	10	30	20	15	90
Total	Male	73%	77%	47%	54%	71%	355
	Female	27%	23%	53%	46%	29%	235
	Total	75	65	170	175	105	590

Source: NCVER 2024, DataBuilder. (Note some cells may be randomly adjusted by NCVER to avoid release of confidential data, percentages may replace numbers, and rounding may result in totals other than 100%)

Data from the Quality Indicators for Learning and Teaching (QILT) show the number of graduations in wine science and viticulture across Australian Universities between 2018 and 2023. Over this period there have been 91 graduations from undergraduate courses and 125 from post graduate courses. In this combined group, gender was represented almost equally, with 107 men (49.5%) and 109 women (50.5%) graduating these courses.

Drawing on data from the graduate outcomes survey shows that between 2018 and 2020, within 12 months of graduation 91.3% of male and 89.7% of female graduates were in the labour force, and 65.1% of females and 89.7% of males were in full-time employment. These figures may be somewhat depressed by the effects of the COVID-19 pandemic, as data from 2021-2023 shows that 96.1% of female and 98.4% of male graduates were in the labour force within 12 months of graduation, while 63.2% of females and 88.8% of males were in full-time employment.

The graduate outcomes survey also provides median incomes for graduates 12 months after completion of their qualifications. A median salary that is higher than the average salary implies that the data is skewed towards higher salaries, while a median that is lower than the average implies a skew towards lower salary. Given the small sample sizes, the QILT was not able to release any further details relating to the pool of graduate salaries. However it is notable that in 2018-2020, men's average salaries were higher than women's, while in 2021-2023 women's average salaries were higher than men's.

Table 3.15 Average and Median Salary, Males, Females, Pooled Years

	Female		Male	
	Average Salary	Median Salary	Average Salary	Median Salary
2018-2020	$45,900	$44,700	$67,300	$58,000
2021-2023	$66,600	$58,400	$64,600	$61,300

4 Challenges and limitations of existing data

Being able to access comprehensive and reliable employment data allows an industry to know accurate information about their workforce, to measure progress, and set targets (Agrifutures, 2024). AgriFutures (2024) 'Mapping the workforce of Australian agriculture' has found that gaps in available data in the agricultural sector limit a comprehensive and nuanced understanding of the workforce. Whilst workforce data about the Australian wine industry does exist in the form of ABS statistics, Census Data and that collected by Wine Australia and the South Australian Wine Industry Association, what is available is not all inclusive or consistent across the value chain.

The Emerging National Rural Issues Forum has raised concerns about the challenges faced in the agricultural industry regarding the 'varied data collection methods used across government bodies [and] Research and Development Corporations (RDCs) … industries, and employers' (Agrifutures, 2024). These factors have been addressed in a recent AgriFutures Report (2024) which explores the challenges to accessing workforce data in a number of sectors and sub-sectors across Australia. The Report identifies three priority issues that are a significant burden for the agricultural sector that have also been identified as limitations in the wine sector:

- Available datasets do not capture or account for seasonal, casual, family member, migrant or labour hire workforces, and may underrepresent industry participation from mixed-farming enterprises. These limitations mean there is no accurate quantification of the size or scale of the sectors and the industries within them.
- Reliable information about labour demand, labour gaps or recruitment issues is unavailable: Due to the recruitment methods used by employers in rural industries and the method by which recruitment data is collected, reliable data on vacancies and recruitment challenges within the sector is not accurate or is unavailable from national datasets.
- Skills and capacity to access, analyse and understand workforce data are limited: Many RDCs and peak industry groups do not have people skilled in data collection and analysis. Resources assigned at the Australian Government level to access and analyse workforce data do not provide the level of coordination or specificity required to provide adequate data to inform workforce planning.

4.1 Australian Bureau of Statistics Census Data

Historically, the Census of Population and Housing and Labour Force Survey are the main data collection sources that provide quantification about employment in the agricultural industry. Identified limitations contained within these datasets include a lack of specificity in the data. Wine sector data, for example, does not capture seasonal or casual employees, all employees along the supply chain, and can exclude small-scale operations, all of which results in a lack of accurate quantification.

As such, Census data for 2021 reveals a total of 20,217 employees across the areas of Winemaking and Grape growing with Winemaking accounting for 74% of employees and Grape growing 26%. Of these women account for 38% of Winemaking and 26% of Grape growing. Given the Australian wine sector reports a total of 163,790 full and part-time employees across 65 winegrowing regions in Australia and over 20,000 wineries this may be underestimated and/or incomplete.

4.2 Workplace Gender Equality Agency (WGEA)

WGEA data offers valuable comparative insights into specific employers in the wine industry. However, the scope of this reporting is limited to employers with over 100 staff. Insights therefore originate from a skewed sample that may not accurately reflect key aspects of gender equality across the entire industry, noting significant numbers of small to medium, family-owned enterprises and the high levels of contractors and sub-contractors who provide employees.

While the six key components reviewed by WGEA may be important variables for the design of a future industry-based survey, as well as a gender equality toolkit for employers, more work is required to understand challenges for the whole of industry. Further, more nuanced analysis of challenges the wine industry faces is required to ensure such interventions are reflective of needs for employers of all sizes.

4.3 The Galbreath Reports

The Galbreath reports (2014 & 2024) have formed a valuable body of knowledge for the sector about the representation of women in strategic roles. However, drawing data in this way creates an inconclusive dataset as the method is somewhat unreliable – too many variables may skew the data. For example, whilst the Galbreath Report identifies growth in women's leadership roles within the wine industry in recent years, it acknowledges that the co-sharing of leadership roles in family-owned enterprises, and the division of labour within these families and enterprises may result in an under-representation of women in CEO or ownership roles (Galbreath 2024). We note issues with the methodologically questionable approach of assigning gender based on names, as this is not best practice for DEI research. Furthermore, the report only explores one aspect of gender equity in addressing women in leadership roles in the sector. The labelling of women's roles and the valuing of work that women do within the sector may also contribute to women's under-representation and under-counting within the sector.

4.4 The South Australian Wine Industry Association

The South Australian Wine Industry Association's Wine Industry Salary and Benefits Report collects useful information for its membership in relation to Industry positions, salary policy and practices, salary movements, incentives and benefits. The Report also has a gender demographic but it does not link women to specific industry positions and salaries, limiting a potential comparative gender analysis.

4.5 The Australian Women in Wine Survey

Whilst collecting basic demographic data and reporting on experiences of gender-based discrimination, including sexist behaviour, the Australian Women in Wine Survey does not cover objective measures of hours worked, pay rates, or levels of leadership. The survey is only extended to women, limiting potential comparative gender analysis.

4.6 Key challenges: a summary

Limitations to existing datasets as discussed above highlight challenges in understanding the state of gender equality in the Australian wine industry. From country-wide data available from the ABS to insights from state-specific salary reporting, challenges should be considered across the categories detailed below:

4.6.1 Relevance

Workforce datasets provide broad context for the Australian wine industry but provide limited insight into specific gender equality concerns. Existing data sets purposed for industry reporting have not prioritised

gender as a key demographic data point. This limits opportunities for the comparison of results across a wider range of variables. Insights into remuneration and salaries by gender cannot be reached with this approach.

4.6.2 Scope

Existing datasets reflect specific decisions around the scope of data collection, including geographical aspects and role types. This results in limited understanding of work roles and correlation with gender equality concerns. In the case of industry surveys lack of reporting on all genders for demographic depth limits opportunities for clear comparative insights between genders. Data collection practices have not allowed for reporting on shared roles and responsibilities.

Gaps in data collection across the value chain are evident throughout existing datasets, including the lack of specificity in the ABS Census data, and the WGEA datasets which report on large employers but have not captured small to medium enterprises (SMEs). These limits to scope mean current data cannot provide insight into gender equality concerns for a significant number of winemakers and growers.

Assumptions may also skew results, where particular roles or titles are gendered in specific ways or names are assigned a gender, as apparent in Galbreath's methodological approach.

4.6.3 Delivery

The timing and direction of data collection methods for existing datasets is also a limitation. A strength of the ABS Census process is the consistent timing of the survey delivery; ensuring comparative data over set timeframes can inform insights into improving or declining levels of representation across industries or between genders. The South Australian Wine Industry Association's Wine Industry Salary and Benefits Report also provides opportunities to map changes over time.

One-off or point in time studies are illustrative, such as the Australian Women in Wine findings, but without further studies and publications in both the Australian and international domains, interventions designed to address gender equality concerns are not able to be comprehensively evaluated and assessed.

Geographical considerations impact delivery of data collection methods; region, or state-specific datasets, are helpful, but inconsistent representation across this demographic may skew findings and insights regarding gender equity specific challenges in the industry.

Identifying these limitations indicates the fragmented nature of existing data and the limitations in informing the sector about the challenges of gender equality in the Australian wine sector. Given these limitations, a qualitative approach in the next phase of this project will allow an understanding of the complexities and nuances of representation and lived experience, enabling the delivery of effective and informed approaches to future data collection.

5 Next steps

Phase 2 allows us to focus on the qualitative investigation of the project. Phase 2 includes identifying strategies to further progress DEI aims.

Our recruitment strategy involves distributing an invitation to participate via Wine Australia, Women in Wine Australia, Australian Grape & Wine Incorporated and the Fabulous Ladies Wine Society. Contacts in these organisations will take carriage of distributing the invitation via email and where appropriate, on their websites and associated social media sites. By outreaching an open invitation, we maximise the opportunity of those to participate. By using an invitation as method, we limit the risk of coercion and undue influence. In recognition of the geographical distribution of the industry, five online focus groups will be conducted.

The invitation to participate is a two-step process to group participants into appropriate clusters based on position and role. A link attached to the email invitation will take potential participants to a Qualtrics page where they answer questions which will be used to classify them. Participants who meet criteria will be sent a link for scheduled times for focus groups. This method of purposive sampling to recruit participants and collect data in qualitative research is used when target participant characteristics and populations are not easily accessible (Etikan, 2016). Purposive sampling involves the deliberate selection of ‘information-rich’ subjects (Devers & Frankel, 2000).

Focus groups will be semi-structured and reasonably flexible to let the discussion flow through the group. They will include questions to assist facilitate and direct the discussion. This is designed to capture the lived experience of those working in the industry. Focus group discussion will extend knowledge beyond existing and available data and identify future data collection parameters that are needed.

Phase 2 will ensure practical applications that inform decision-making are developed and will enable clarification of roles and responsibilities of key bodies in the sector. This phase will also identify potential narratives and examples of workplace gender equality excellence to be explored in Phase 3 as part of the framework of requirements for the industry toolkit.

6 References

ABS. (2021). *Australian Census of Population and Housing, 2021*. https://www.abs.gov.au/statistics/microdata-tablebuilder/tablebuilder

Agrifutures. (2024). *Mapping the workforce of Australian agriculture*. https://agrifutures.com.au/product/mapping-the-workforce-of-australian-agriculture/

Almila, A.-M. (2019). Wine, women and globalization: The case of female sommeliers. In D. Inglis & A.-M. Almila (Eds.), *The Globalization of Wine* (1st ed.). Bloomsbury Publishing Plc. https://doi.org/10.5040/9781474265027

Australian Research Council. (2022). *Shining a light on the invisible farmer*. https://www.arc.gov.au/news-publications/media/making-difference-publication/shining-light-invisible-farmer

Bell, M., Thach, L., & Fang, F. (2023). Examining motivations and challenges of black wine entrepreneurs using the push–pull theory of entrepreneurship. *International Journal of Wine Business Research*, *35*(3), 445–466. https://doi.org/10.1108/IJWBR-07-2022-0026

Blickenstaff, J. C. (2005). Women and science careers: Leaky pipeline or gender filter? *Gender and Education*, *17*(4), 369–386. https://doi.org/10.1080/09540250500145072

Broom, F. (2024, September 22). It's been 30 years since the census recognised women as farmers, but there's still 'a long way to go'. *ABC News*. https://www.abc.net.au/news/rural/2024-09-23/australian-women-in-agriculture-30-year-anniversary/104375566

Bryant, L., & Garnham, B. (2014). The Embodiment of Women in Wine: Gender Inequality and Gendered Inscriptions of the Working Body in a Corporate Wine Organization. *Gender, Work & Organization*, *21*(5), 411–426. https://doi.org/10.1111/gwao.12045

Costello, M. (2018). *Women are the 'invisible force' powering Australian farms*. The Feed, SBS News. https://www.sbs.com.au/news/the-feed/article/women-are-the-invisible-force-powering-australian-farms/97unedjib

D'Amato, A. (2017). Do women perform better in family firms? *International Journal of Wine Business Research*, *29*(3), 299–315. https://doi.org/10.1108/IJWBR-12-2016-0039

Devers, K. J., & Frankel, R. M. (2000). Study Design in Qualitative Research—2: Sampling and Data Collection Strategies. *Education for Health*, *13*(2), 263.

Duarte Alonso, A., Kok, S., & Galbreath, J. (2021). Entrepreneurial women in the wine industry: A study in emerging economies. *International Journal of Wine Business Research*, *33*(2), 197–216. https://doi.org/10.1108/IJWBR-03-2020-0010

Etikan, I. (2016). Comparison of Convenience Sampling and Purposive Sampling. *American Journal of Theoretical and Applied Statistics*, *5*(1), 1. https://doi.org/10.11648/j.ajtas.20160501.11

Galbreath, J. (2015). A study of women in top business roles: The case of the wine industry. *International Journal of Wine Business Research*, *27*(2), 143–158. https://doi.org/10.1108/IJWBR-10-2014-0045

Galbreath, J. (2018). A Study of Women in Top Business Roles: The Case of the Wine Industry. In W. T. Ziemba (Ed.), *World Scientific Handbook in Financial Economics Series, World Scientific* (pp. 401–421).

Galbreath, J. (2019). Drivers of Green Innovations: The Impact of Export Intensity, Women Leaders, and Absorptive Capacity. *Journal of Business Ethics*, *158*(1), 47–61. https://doi.org/10.1007/s10551-017-3715-z

Galbreath, J. (2024). *Women in the Australian wine sector How have the numbers changed in CEO, winemaking, viticulture, and marketing roles since 2013?* Report for Wine Australia.

Galbreath, J., & Tisch, D. (2020). The effects of women in different roles on environmentally sustainable practices: Empirical evidence from the Australian wine industry. *Australasian Journal of Environmental Management*, *27*(4), 434–451. https://doi.org/10.1080/14486563.2020.1838351

Gilbert, L. (2012). *Evidence of Women Winemakers' Success in a Male-Dominated Field*. 24–27. https://www.semanticscholar.org/paper/Evidence-of-Women-Winemakers'-Success-in-a-Field-Gilbert/30d329349db4b81be28f566e4756ed85fac539c8

Gilbert, L. A., & Gilbert, J. C. (2015). *California women winemakers: Three studies assess their progress and prospects* (Working Paper 178). American Association of Wine Economists. https://wine-economics.org/wp-content/uploads/2015/05/AAWE_WP178.pdf

Gillespie, R., & Clark, M. (2019). *Economic Contribution of the Australian Wine Sector 2019*. AgEconPlus Consulting for Wine Australia.

Laslett, A. (2023). *Diversity Equality and Inclusion in Wine Committee Letter to Wine Australia*.

Livat, F., & Jaffre, C. (2022). Women in wine… occasionally: Gendered roles in the wine industry. In *The Routledge Handbook of Wine and Culture* (pp. 320–330). Routledge.

Makarova, E., Aeschlimann, B., & Herzog, W. (2016). Why is the pipeline leaking? Experiences of young women in STEM vocational education and training and their adjustment strategies. *Empirical Research in Vocational Education and Training*, *8*(1), 2. https://doi.org/10.1186/s40461-016-0027-y

Matasar, A. B. (2006). *Women of Wine: The Rise of Women in the Global Wine Industry*. University of California Press.

Moskin, J. (2020, October 29). *The Wine World's Most Elite Circle Has a Sexual Harassment Problem*. New York Times (Online); New York Times Company. https://www.proquest.com/docview/2455245265/citation/124A3BABA7964969PQ/1

Ojediran, O. (Funmi), Discua Cruz, A., & Anderson, A. (2022). Identities and the pursuit of legitimacy: A study of black women wine industry entrepreneurs. *International Journal of Entrepreneurial Behavior & Research*, *28*(8), 2182–2207. https://doi.org/10.1108/IJEBR-05-2021-0382

Port, J. (2016, November 30). Wine, insults and coffee making: A Women in Wine survey. *LinkedIn*. https://www.linkedin.com/pulse/insults-coffee-making-results-from-international-wiw-survey-carter/

Preston, A., & Jefferson, T. (2007). Trends in Australia's Gender—Wage Ratio. *Labour and Industry*, *18*(2), 69–84. https://doi.org/10.1080/10301763.2007.10669368

Reynolds, E. (2016). Women in wine: It's a sexist award, it needs to be. *Australian and New Zealand Grapegrower and Winemaker*, *624*, 62–65. https://doi.org/10.3316/ielapa.055543331546291

Smith, L., Doak, E., & Higgins, K. (2024, May 29). Gender gap still wide in wine despite report showing progress for women. *ABC News*. https://www.abc.net.au/news/2024-05-30/gender-gap-still-wide-open-for-women-in-wine-industry/103874600

Thompson, J. (2016, May 3). National survey reveals damning state of gender equality in the Australian wine industry. *Australian Women in Wine*. https://womeninwine.com.au/national-survey-reveals-damning-state-gender-equality-australian-wine-industry/

Wigan, S. (2023). *Factors Impacting the Advancement of Women Working in Production Roles in the Australian Wine Industry*.

Wine Australia. (2023). *Australian wine sector at a glance*. https://www.wineaustralia.com/market-insights/australian-wine-sector-at-a-glance

Appendix A

Table 6.1 Identification of existing datasets

Name of dataset	Owner/publisher of data/report	Data type	Challenges	Parameters: years,	Parameters: geography	Method of collection
ABS data	Census of population and Housing	Census data collected every 5 years, 2006-2021 available online Gender by status of employment (ie employee vs owner manager) Gender and total number of employees by industry sub sector, hours worked, p-t/f-t status Occupational skill levels by gender of employees/owner managers Highest level of qualification by gender of employees/owner managers Age by sex of employees/owner managers Cultural and linguistic diversity of industry subsectors	Given the snapshot nature, only captures those employed at the time of the census. Does not adequately capture seasonal workers, does not capture contractor/sub contractor level. The structure of industry (ANZSIC) and occupation (ANZSCO) codes, mean that while it is possible to collect data on grape growing and manufacture of wine and other alcoholic beverages, it is not possible to disaggregate wholesaling, retailing and hospitality to the level of wine distribution, sales, or hospitality and broader tourism.	Census data collected every 5 years, 2006-2021 available online	Collection at census district level, can be aggregated to LGA, Region, State and Nationally	Total census of all population in Australia. Snapshot at the time of collection (usually September) within year of collection.
Women in Wine Survey (2016)	Australian Women in Wine	Reporting on experiences of gender-based discrimination including sexist behaviour, and	Data focuses on the perceptions and experiences of 279 participants, collects some basic demographic data	Study 2015/2016, article published 2016	Australia	Survey

		demographics of gender, age, marital/family status.	which can be compared to census data to identify representativeness of the sample, but does not cover objective measures of hours worked, pay rates, levels of leadership. Survey only extended to women, no data on men. Transparency around data collection and analysis remains problematic. Article produced in blog post format may lack context or opportunities to develop comparison.			
Galbreath Report (2014,2017,2024)	Wine Australia	Gender in leadership roles in the Wine Sector in Australia	Only explores leadership titles of staff listed in the Winetitles Directory. May be skewed by gendered perceptions of roles and titles and gendered division of labour within small to medium and family-owned enterprises	2014,2017,2024	National level data, disaggregated to state level	Desktop research based on analysis of the Australian and New Zealand Wine Industry Directory
Economic Contribution of the Australian Wine Sector 2019	Gillespie and Clarke (AgEconPlus) for Wine Australia	Captures the multiplier effect of wine sector on employment including estimates for direct and indirect employment in Wine Tourism (114,049 jobs)	Does not provide any gender analysis	2019	National data	Economic analysis of census data, current accounts, revenue, expenditure
WGEA	Equal Remuneration:	Reports on key measures of gender equality including pay rates, gender composition of workforce and boards, access	Only covers employers with 100 or more employees, does not capture gender equality or equal remuneration in small to	Annual	National data collection can be disaggregated to state and industry.	Annual reporting on progress towards gender

	The Gender Pay Gap	to family friendly and carer's workplace policies, consultation with staff on gender equality issues, and existence of sexual harassment or discrimination policies.	medium or family-owned enterprises.		Key employers can be identified.	equity by private sector organisations employing 100 staff or more.
2023 Wine Industry Salary and Benefits Report	South Australian Wine Industry Association Incorporated	A wine industry-specific salary report to keep wine businesses up to date with market salaries and remuneration practices across the wine industry	Data obtained from voluntary survey. In this report, 39 companies participated. In 2022, 55 companies participated.	Annual	South Australia specific	Industry specific survey

Appendix B WGEA data – individual employers

Table 6.2 Progress towards gender equality in the workplace – Individual employers

Primary Measure	Secondary Measure	National	Accolade Wines Australia Limited	Angove's Pty Ltd	Australian Vintage Ltd	The Australian Wine Research Institute	Brown Brothers Milawa Vineyard Pty. Limited	Casella Wines Pty. Limited	Chapel Hill Winery Pty Ltd	De Bortoli Wines Pty Limited	Innocent Bystander PTY LTD	JOVAL WINES PTY LTD	Kingston Estate Wines Pty Ltd	Moorilla Estate Pty Ltd	Pernod Ricard Winemakers Pty Ltd	Robert Oatley Vineyards PTY. LTD.	S. Smith & Son Pty. Limited	Taylors Wines Pty. Ltd.	Treasury Wine Estates Vintners Limited	Vasse Felix Pty Ltd
Gender Equality Strategies and Policies																				
Policy to support gender equality in the workplace?		79%	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
Gender equality policy inclusions	KPIs for managers	38%	No	No	No	No	No	Yes	No	No	No	No	No	No	Yes	No	No	No	Yes	No
	Performance management processes	86%	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No
	Promotions	73%	Yes	Yes	No	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No
	Recruitment	89%	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	Yes	Yes	Yes	No
	Retention	70%	Yes	Yes	Yes	No	No	Yes	Yes	Yes	No	Yes	No	No	Yes	Yes	Yes	Yes	Yes	No
	Succession planning	72%	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	Yes	No	Yes	Yes	Yes	No
	Talent identification	73%	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	No	Yes	Yes	Yes	No	Yes	No
	Training and development	87%	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	No	Yes	Yes	No
Percentage of employees	Women	51%	45%	41%	36%	62%	41%	30%	46%	41%	41%	49%	28%	45%	47%	44%	42%	36%	39%	49%
Percentage of managers	Women	42%	39%	16%	35%	43%	28%	23%	40%	31%	28%	35%	36%	46%	51%	31%	28%	21%	43%	25%
Percentage of non-managers	Women	52%	46%	47%	36%	66%	43%	31%	46%	43%	43%	53%	27%	45%	46%	46%	45%	40%	38%	54%
Percentage of CEOs	Women	22%	0%	50%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0
Percentage of Key Management Personnel	Women	37%	40%	29%	30%	0%	50%	29%	0%	27%	50%	40%		40%	14%		43%	17%	0%	25
Percentage of women	Full-time	43%	57%	67%	70%	46%	40%	53%	25%	61%	40%	73%	55%	32%	75%	69%	60%	76%	86%	42%
	Part-time	30%	7%	18%	15%	27%	14%	18%	20%	13%	14%	26%	32%	38%	12%	11%	14%	9%	14%	13%
	Casual	28%	36%	16%	15%	27%	47%	29%	55%	25%	47%	1%	13%	30%	13%	20%	26%	15%	0%	45%
Percentage of appointments	Women	53%	50%	46%	41%	73%	38%	48%	46%	50%	38%	50%	33%	58%	54%	40%	48%	36%	46%	40
Percentage of promotions	Women	47%	67%	50%	64%	47%	50%	38%	52%	62%	50%	56%	22%	52%	54%	50%	29%	25%	50%	40
Percentage of resignations	Women	54%	50%	65%	45%	69%	46%	60%	48%	40%	40%	50%	44%	21%	52%	32%	50%	47%	39	

Source: WGEA Data Explorer (https://www.wgea.gov.au/data-statistics/data-explorer) (note rounding may result in totals other than 100%)

Table 6.3 Leadership and representation on boards – Individual employers

Primary Measure	Secondary Measure	National	Accolade Wines Australia Limited	Angove's Proprietary Limited	Australian Vintage Ltd	The Australian Wine Research Institute	Brown Brothers Milawa Vineyard Pty. Limited	Casella Wines Pty. Limited	Chapel Hill Winery Pty Ltd	De Bortoli Wines Pty Limited	Innocent Bystander PTY LTD	Joval Wines PTY LTD	Kingston Estate Wines Pty Ltd	Moorilla Estate Pty Ltd	Pernod Ricard Winemakers Pty Ltd	Robert Oatley Vineyards PTY. LTD.	S. Smith & Son Pty. Limited	Taylors Wines Pty. Ltd.	Treasury Wine Estates Vintners Limited	Vasse Felix Pty Ltd
Policy to support gender equality in composition of board?		29%	No	No	Yes	Yes	No	No	No	No	No	No	No	No	Yes	No	No	No	Yes	No
Target set to increase the representation of women on board?		13%	No	No	Yes	No	No	No	Yes	No	No	No	No	No	Yes	No	No	No	Yes	No
Percentage of board members (including Chairs)	Women	31%	33%	33%	17%	40%	50%	0%	38%	50%	50%	20%	17%	40%	25%	0%	43%	25%	43%	
	Men	69%	67%	67%	83%	60%	50%	100%	63%	50%	50%	80%	83%	60%	75%	100%	57%	75%	57%	
Percentage of board Chairs	Women	19%	0%	0%	0%	0%	0%	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	0%	0%	
	Men	81%	100%	100%	100%	100%	100%	100%	100%	0%	100%	100%	100%	100%	100%	100%	100%	100%	100%	

Source: WGEA Data Explorer (https://www.wgea.gov.au/data-statistics/data-explorer) (note rounding may result in totals other than 100%)

Table 6.4 Policies and progress towards equal remuneration – Individual employers

Primary Measure	Secondary Measure	National	Accolade Wines Australia Limited	Angove's Pty Ltd	Australian Vintage Ltd	The Australian Wine Research Institute	Brown Brothers Milawa Vineyard Pty. Limited	Casella Wines Pty. Limited	Chapel Hill Winery Pty Ltd	De Bortoli Wines Pty Limited	Innocent Bystander PTY LTD	JOVAL WINES PTY LTD	Kingston Estate Wines Pty Ltd	Moorilla Estate Pty Ltd	Pernod Ricard Winemakers Pty Ltd	Robert Oatley Vineyards PTY. LTD.	S. Smith & Son Pty. Limited	Taylors Wines Pty. Ltd.	Treasury Wine Estates Vintners Limited	Vasse Felix Pty Ltd
Equal Pay Strategies																				
Policy or strategy on equal remuneration?		70%	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes
Conducted a remuneration gap analysis?		55%	Yes	Yes	No	Yes	Yes	Yes	Yes	No	Yes	Yes	No	Yes	Yes	Yes	Yes	No	Yes	No
Taken actions as a result of remuneration gap analysis?		60%	Yes	Yes	NS	No	No	Yes	Yes	NS	No	No	NS	Yes	Yes	No	Yes	NS	Yes	NS
Median base salary gender pay gap	All employees	14.5%	1.8%	5.5%	-2.2%	26.6%	4.2%	6.3%	0.6%	14.4%	4.2%	13.4%	-16.7%	2.4%	-9.2%	7.1%	1.2%	9.2%	-16.9%	2.1%
Median total remuneration gender pay gap	All employees	19.0%	0.9%	8.5%	-4.1%	26.6%	4.2%	12.3%	0.7%	18.1%	4.2%	22.7%	-7.9%	2.4%	-17.0%	22.8%	5.7%	15.2%	-16.9%	0.0%

Source: WGEA Data Explorer (https://www.wgea.gov.au/data-statistics/data-explorer) (note rounding may result in totals other than 100%)

Table 6.5 Sex-based harassment and anti-discrimination policies – Individual employers

Primary Measure	National	Accolade Wines Australia Limited	Angove's Proprietary Limited	Australian Vintage Ltd	The Australian Wine Research Institute	Brown Brothers Milawa Vineyard Pty. Limited	Casella Wines Pty. Limited	Chapel Hill Winery Pty Ltd	De Bortoli Wines Pty Limited	Innocent Bystander PTY LTD	Joval Wines PTY LTD	Kingston Estate Wines Pty Ltd	Moorilla Estate Pty Ltd	Pernod Ricard Winemakers Pty Ltd	Robert Oatley Vineyards PTY. LTD.	S. Smith & Son Pty. Limited	Taylors Wines Pty. Ltd.	Treasury Wine Estates Vintners Limited	Vasse Felix Pty Ltd
Sex-base harassment or anti-discrimination strategies or policies																			
Policy on sex-based harassment or discrimination?	98%	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Policy includes a grievance process?	97%	Yes	Yes	Yes		Yes		Yes		Yes	Yes	Yes	Yes			Yes	Yes		Yes
Training for managers on sexual harassment or discrimination?	89%	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes

Source: WGEA Data Explorer (https://www.wgea.gov.au/data-statistics/data-explorer) (note rounding may result in totals other than 100%)

Table 6.6 Provision of flexible work arrangements, carers' and work-life balance policies and entitlements – Individual employers

Primary Measure	Secondary Measure	National	Accolade Wines Australia Limited	Angove's Proprietary Limited	Australian Vintage Ltd	The Australian Wine Research Institute	Brown Brothers Milawa Vineyard Pty. Limited	Casella Wines Pty. Limited	Chapel Hill Winery Pty Ltd	De Bortoli Wines Pty Limited	Innocent Bystander PTY LTD	Joval Wines PTY LTD	Kingston Estate Wines Pty Ltd	Moorilla Estate Pty Ltd	Pernod Ricard Winemakers Pty Ltd	Robert Oatley Vineyards PTY. LTD.	S. Smith & Son Pty. Limited	Taylors Wines Pty. Ltd.	Treasury Wine Estates Vintners Limited	Vasse Felix Pty Ltd
Family friendly policies and strategies																				
Employer funded paid parental leave is provided?	Universally available	21%					Universally available				Universally available				Universally available			Universally available		
	Using primary / secondary carer labels	42%	Using primary / secondary carer labels		Using primary / secondary carer labels	Using primary / secondary carer labels		Using primary / secondary carer labels	Using primary / secondary carer labels			Using primary / secondary carer labels		Using primary / secondary carer labels			Using primary / secondary carer labels		Using primary / secondary carer labels	
	No	36%		No paid parental leave						No paid parental leave			No paid parental leave			No paid parental leave				No paid parental leave
How many weeks (minimum) of employer funded paid parental leave is provided?	Primary carers or universally available	12 weeks	18 weeks		26 weeks	12 weeks	8 weeks	12 weeks	12 weeks		8 weeks	4 weeks		12 weeks	15 weeks		8 weeks	18 weeks	12 weeks	
	Secondary carers	3 weeks			4 weeks	1 weeks			2 weeks			4 weeks		2 weeks			2 weeks		6 weeks	
How many months is the qualifying period for employer funded paid parental leave?	Primary carers or universally available	11 months	12 months		12 months	12 months	12 months	12 months	6 months		12 months	12 months		52 months			6 months	12 months	6 months	
	Secondary carers	10.5 months			12 months	12 months			12 months			12 months		52 months			6 months		6 months	
Superannuation contributions paid to carers while they are on parental leave?	Primary carers or universally available	85%	No		Yes	No	Yes	Yes	Yes		Yes	No		No	Yes		Yes	Yes	Yes	
	Secondary carers	86%			Yes	No			Yes			No		No			Yes		Yes	
Percentage of paid parental leave taken by women?	Primary carers or universally available	86%	100%	100%	100%	100%	100%	100%	97%	100%	100%	100%	100%	100%	76%	100%	100%	100%	90%	100%
	Secondary carers	5%	0%		0%	0%	0%		1%	0%	0%	0%	0%	0%	0%			0%	0%	
Percentage of paid parental leave taken by men?	Primary carers or universally available	14%	0%	0%	0%	0%	0%	0%	3%	0%	0%	0%	0%	0%	24%	0%	0%	0%	10%	0%
	Secondary carers	95%	100%		100%	100%	100%		99%	100%	100%	100%	100%	100%	100%			100%	100%	
Policy on flexible working arrangements?		84%	Yes	Yes	Yes	No	Yes	No	Yes	No	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No
Flexible working options	Flexible hours of work	97%	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Compressed working weeks	59%	Yes	No	Yes	No	No	No	No	No	No	No	Yes	No	Yes	No	No	Yes	No	Yes
	Time-in-lieu	94%	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Telecommuting (e.g. working from home)	95%	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Part-time work	98%	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Job sharing	66%	Yes	No	Yes	Yes	Yes	No	Yes	No	Yes	Yes	Yes	No	Yes	No	Yes	Yes	Yes	No
	Purchased leave	42%	No	No	Yes	Yes	Yes	No	Yes	No	Yes	No	No	Yes	No	No	No	No	Yes	No
	Unpaid leave	99%	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Policy to support employees who are experiencing family		81%	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	No	No	Yes	Yes	No

Source: WGEA Data Explorer (https://www.wgea.gov.au/data-statistics/data-explorer) (note rounding may result in totals other than 100%