Charles Sturt University

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

Phase 3 study summary and recommendations

Regional Work and Organisational Resilience Research Group, Charles Sturt University, and

Public Sector Research Group, UNSW

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Introduction

This final report concludes a three-phase research project examining gender equity in the Australian grape and wine sector, commissioned by Wine Australia in collaboration with Australian Grape & Wine's Diversity, Equality and Inclusion in Wine (DEIW) Committee. Building on the findings from Phase 1 and Phase 2, the summary and recommendations below synthesise key insights to present a clear picture of the current state of gender equality across the sector. We draw together our analysis of workforce data, the lived experiences of women working in the industry, and reflections on structural and cultural barriers to progress. Together, these insights form the basis for a set of practical, evidence-informed recommendations for sector-wide action.

While the industry has made strides in raising awareness and supporting gender diversity, challenges persist—particularly in areas such as flexible work arrangements, leadership, pay equity, and the visibility of women's contributions. Our findings highlight both the complexity of these issues and the significant opportunities that exist to strengthen inclusion across the value chain.

This final brief paper aims to support industry stakeholders by offering targeted recommendations that respond to the realities uncovered in earlier phases, and by outlining a way forward for sustained progress toward a more equitable and innovative future for the Australian wine industry. The summary and recommendations are intended to pair with the Australian Wine Industry Gender Equity Toolkit.

The scoping study – phases in brief

The scoping study undertaken by the Charles Sturt University and UNSW Canberra research team was delivered in three phases.

In **Phase 1**, the research team examined existing datasets to establish how the Australian wine sector could utilise available data and address knowledge gaps regarding gender diversity, equity, and inclusion. The investigation analysed gender workforce data within the grape and wine sector value chain, drawing on statistical evidence from the Australian Bureau of Statistics (ABS), and Workplace Gender Equality Agency (WGEA), among other industry reports. The findings were contextualised within broader industry reporting and academic research, while also identifying the challenges and limitations of the existing datasets. These insights and gaps were incorporated into the design and delivery of Phase 2.

In **Phase 2**, the research team conducted extensive qualitative research to identify challenges and opportunities for advancing diversity, equality, and inclusion across the Australian wine industry. The research involved 18 online focus groups with women working in the wine sector, between October and December 2024. This was supplemented by the research team participating in an industry symposium on women in wine. This phase identified industry decision-making processes, examples of workplace gender equality excellence and ongoing challenges. The Phase 2 data also established a framework for developing an industry toolkit to translate theoretical insights into practical implementation strategies.

Phase 3 delivers a comprehensive wine industry toolkit featuring powerful case studies showcasing gender equality successes across the entire value chain and geographical footprint. Drawing on robust data from Phases 1 and 2, our expert research team provides targeted recommendations that identify actions with high-impact possibilities for addressing key priority challenges for gender equality in the wine sector. These insights come from scholars with proven track records in advancing gender equity across a range of Australian male-dominated industries.

The toolkit is the start point for immediate actionable and practical strategies that employees, managers and business owners can engage with for short-, medium- and long-term progress against gender equity goals.

Project Advisory Group

A project Advisory Group was convened to oversee the progress and overall direction of the research project. The Advisory Group operated in a co-design capacity and facilitated the achievement of practical

outcomes for the sector. The work of the Advisory Group was collaborative in nature, providing opportunities to discuss challenges, emerging findings, and implications for practice. Collectively, the Advisory Group contributed to tasks including:

- Providing input on emerging findings
- Discussing progress updates
- Monitoring the project scope and planned outcomes
- Providing advice on challenges faced
- Identifying and brokering relationships that supported the project, and
- Planning for the delivery and dissemination of project outputs.

The Advisory Group contributed a range of overarching insights in this role, including a **strong call for practical, scalable tools –** particularly **resources** that are realistic for small and medium enterprises.

They highlighted a shared understanding that gender equality requires more than policy—it needs **deep cultural change**, including the engagement of **industry leaders, men as allies**, and efforts to showcase **real stories**.

The Advisory Group ensured **a focus on engagement and accessibility through** early and ongoing end-user engagement. Accessibility for those with limited HR literacy or training was noted as critical.

The Group acknowledged the unique features of the wine industry: **fragmentation**, **seasonality**, and the **SME-heavy landscape**, and argued that gender initiatives must be contextualised to work within these realities.

There was an evident consensus that the toolkit must include mechanisms for **accountability, monitoring**, and **evaluation**, noting that meaningful, measurable change must be the goal.

Finally, the Advisory Group addressed risk awareness and mitigation, including risks to adoption, cultural resistance, perceptions of tokenism, and poor timing. They proposed strategies to counter these, including incentives, broad framing of equity, and long-term engagement planning.

Phase 1: Key insights and challenges

A lack of research in this area demonstrates that there are existing gaps in knowledge and understandings about women's employment in the Australian wine sector. However, the body of literature and research does point to persistent gender discrimination, hierarchical inequalities, and barriers related to pregnancy and family responsibilities. Recent industry surveys show strong support for diversity initiatives while acknowledging underrepresentation in leadership positions, gender bias, and limited flexibility as key barriers to women's advancement in production roles. Together, these sources indicate a disconnect between growing educational participation and actual workforce representation, suggesting systemic issues affecting women's retention and progression in the industry.

The insights highlighted below were drawn from datasets from the Australian Bureau of Statistics (ABS) Census, the Workplace Gender Equality Agency (WGEA), two Galbreath reports (2014 & 2024), the Australian Women in Wine Survey (2015–2016), the South Australian Wine Industry Salary and Benefits Report (2023), and vocational and higher education data from NCVER and QILT.

While women's participation in the wine industry has grown, particularly in wine manufacturing, interrogation of these datasets show that structural inequalities remain across employment type, income, leadership, and education. Women now make up over a third of the workforce but remain underrepresented in ownership and leadership roles, and overrepresented in lower-paid, part-time, and support positions. Although women are more likely than men to hold university-level qualifications, this has not led to equal representation in senior roles or higher income brackets. Income disparities are marked, with women far less likely to earn over $800 per week, and career interruptions during parenting years, especially in roles associated with grape growing, further impact women's progression. Geographically, gender patterns are consistent across states, with Tasmania being a notable exception where women's employment has recently grown. Women also bring greater diversity to the workforce, particularly in grape growing, yet persistent gendered assumptions have been found to limit recognition of their contributions.

The report *A scoping study of gender equality in the Australian wine sector – Phase 1* highlights limitations in existing data sets as resources for understanding and addressing gender equality. WGEA addresses data collection and reporting requirements for relevant employers – broadly, any employer with 100 or more employees in Australia – however, data collection from small and medium enterprises in the wine sector remains inconsistent. This context is further discussed in Chapter 4 of the Phase 1 report and informs the recommendations for data collection and analysis below.

Phase 2: Key insights and challenges

Phase two represents focus group findings that deliver rich, in-depth insights into the experiences of women in the wine sector and the knowledge, attitudes and insights that they derive from that experience. This phase provides original findings about gender equity and inclusion in the Australia wine sector. These findings are based on the shared understandings and diverse viewpoints of women interviewed. The study has identified key themes and patterns in relation to social, cultural, and structural factors. Findings provide contextual detail that goes beyond surface-level trends identified in survey research while also building upon that earlier research and adding complex and nuanced understanding to the survey data.

Participants acknowledged that industry culture has evolved over the past decade, with growing acceptance and recognition of women's roles, and workplaces that are open and responsive to women as equal colleagues, flexible work provision, and women in leadership. Persistent norms, often described by focus group participants as 'masculine' or 'macho' continue to shape daily workplace experiences. Everyday sexism i.e., stereotyped assumptions about women's physical abilities, and expectations that women should conform to male-dominated norms, including pressure to adopt a "one of the boys" persona remain widespread. Sexual harassment was found to be an ongoing issue, with underreporting driven by fear of professional consequences. Leadership inequalities were evident, with women's contributions often undervalued and subjected to double standards, for example, in how their leadership styles are perceived. The under-recognition of women's achievements, particularly in comparison to their male counterparts, was found to restrict career progression and result in women being overlooked for opportunities. Lack of access to flexible work was identified as a major barrier, with participants urging the development of more responsive and inclusive models to support career longevity in a physically demanding and traditionally inflexible industry, approaches which will have significant positive impact regardless of gender and role. Mentoring programs and peer-based tasting groups were seen as important enablers of professional growth.

Participants called for greater representation of women across all levels of the industry, stronger education and training pathways, and targeted financial supports for professional development and training.

Recommendations

For Small and Family-Owned Businesses

1. Connect with other small businesses – begin with local and regional opportunities and work collaboratively to seek training and support including access to and implementation of best-practice resources – *see Toolkit Section 3: Inclusive retention practices; Section 6: Further information.*
2. Develop clear position descriptions and advancement criteria to reduce reliance on informal networks – *see Toolkit Section 2: Attraction and Recruitment; Section 3: Inclusive retention practices.*
3. Create formal policies around harassment, discrimination and reporting procedures, even in small teams. Establish clear reporting mechanisms for harassment and discrimination which ensure protection from repercussions – *see Toolkit Section 3: Inclusive retention practices; Section 4: Cultural Change*.
4. Actively participate in industry-wide mentoring networks to provide opportunities beyond family connections and share insight into staff development practices – *see Toolkit Section 3: Inclusive retention practices.*
5. Engage with industry-wide resources for insights and instruction on flexible work arrangements. Pilot, evaluate and refine flexible working arrangements that accommodate caregiving responsibilities and seasonal workload requirements, without career penalties – *see Toolkit Section 3: Inclusive retention practices.*

For Large Employers

1. Implement and formalise mentoring programs that specifically support women's career progression, including structured pathways from technical roles into management positions *see Toolkit Section 3: Inclusive retention practices.*
2. Implement transparent recruitment and promotion criteria - *see Toolkit Section 2: Attraction and Recruitment*.
3. Develop comprehensive workplace policies that address harassment and discrimination, ensuring clear reporting mechanisms and protection from repercussions - *see Toolkit Section 3: Inclusive retention practices; Section 4: Cultural Change*.
4. Review workplace health and safety procedures to ensure they are gender-neutral and based on occupational health standards rather than assumptions about physical capabilities - *see Toolkit Section 3: Inclusive retention practices*.
5. Establish leadership development programs that recognise and value diverse management and leadership styles - *see Toolkit Section 3: Inclusive retention practices*.

6. Create formal and specialised sponsorship programmes where senior leaders actively work with women candidates for their leadership advancement - *see Toolkit Section 3: Inclusive retention practices*.

7. Institute regular workplace culture audits to identify and address instances of everyday sexism and unconscious bias *see Toolkit Section 3: Inclusive retention practices; Section 5: Organisational Assessment*.

For Industry Bodies

Australian Grape & Wine

1. Renew the commitment of existing and potential signatories to the Australian Grape and Wine Diversity Equity and Inclusion in Wine Charter, coupled with communication of the toolkit to multiple stakeholders across the sector.

2. Explore the establishment of an industry-specific parental leave policy and flexible work framework - *see Toolkit Section 3: Inclusive retention practices*.

3. Explore a centralised reporting mechanism for workplace issues that provides confidentiality and support – for key considerations, refer to *Toolkit Section 4: Cultural change*.

Wine Australia

1. Package and deliver the toolkit in collaboration with multiple stakeholders across the sector through a targeted extension and adoption program.

2. Explore options to develop and deliver a structured and formalised senior leadership peer-to-peer mentor program for female leaders in the sector, supporting the transition into and those currently working in senior leadership roles across the sector.

All industry led organisations at national, state or regional levels can:

1. Increase visibility of women leaders through awards, scholarships, structured networking, speaking opportunities, and industry publications.

2. Develop relationships with educational institutions and other relevant organisations (i.e. regional development boards) to promote wine industry careers to women and support pathways into leadership, leveraging the existing education and people development programs available across the sector (Careers in viticulture and wine, Rootlings, Next Crop, Wine Industry Mentor Program (early career mentees) and more)[1].

3. Pursue and/or formalise supports for small and medium sized businesses to implement and update equitable and inclusive practices identified in the Toolkit, e.g. support to implement flexible working during vintage, access to career development programs, and policy development. This might include regular monitoring of grant or other funding and support programs, joint responses and/or support with submissions; and exploring collaborative funding approaches.

[1] Wine Australia people development programs.

Data Collection and Analysis

Australian Grape and Wine - DEIW Committee

1. Develop a business case for inclusion of equity and diversity reporting in Sustainable Winegrowing Australia (SWA), in comparison to other potential reporting frameworks.

Wine Australia

1. Commit to regular **research monitoring and reporting** on progress of gender equity and other DEI measures across the industry, for example:
    a. Extract all available gender data, from WGEA, other existing sources (i.e. those used in the phase one report) and future sources (i.e. if included in SWA) to analyse and publish a collated annual report on gender data for the sector, similar to existing Market Insights reports.
    b. Use a best practice approach to apply consistent reporting methodologies that allow for tracking progress over time.
    c. Consider the inclusion of multiple demographics such as ethnicity, socioeconomic status, age, disability status, gender diversity, educational background, migration status, and carer responsibilities, to better understand the intersecting overlapping challenges.
    d. Monitor and evaluate engagement with and use of the toolkit.

To address the current absence of a comprehensive national workforce dataset:

a. **Wine Australia** to continue engagement with governing bodies including the Department of Agriculture, Fisheries and Forestry (DAFF), National Farmers Federation, Jobs and Skills Councils and other RDCs to ensure the sector is represented in wider efforts to capture National Agriculture Workforce Data.

b. **State wine industry associations** take a leadership role in:
    i. Consulting with employers and employees to develop gender representation benchmarks/targets across the value chain
    ii. Promoting the toolkit and supporting employers to use the standard self-assessment tools included in the toolkit – *see Toolkit Section 5 – Organisational Assessment*.
    iii. Encouraging organisations to voluntarily report against benchmarks
    iv. Collating and publishing a regular ‘pulse check’ to promote transparency, track progress, and encourage sector-wide accountability