

# 2021 SA VINEYARD OWNER SURVEY TOPLINE REPORT



# The SA Vineyard Owner Survey

Vinehealth Australia regularly surveys vineyard owners and operators in South Australia to:

- Understand perceived and actual biosecurity exposure of vineyards
- Ascertain the level of adoption of biosecurity and farm-gate hygiene practices and the level of change since the last survey
- Gather feedback on Vinehealth Australia's activities and services

**This report presents the topline results of the 2021 survey.**

Vinehealth Australia thanks all vineyard owners who completed the survey. We are pleased that the response rate is increasing with each survey, and we are delighted to see an increase in the adoption of farm-gate hygiene practices as compared to the 2018 survey result.

Your responses provide valuable information and insights that we will use to further improve our services, resources and operations to better support growers and help protect vineyards from biosecurity threats.

We intend to share this summary of results broadly to ensure they are used to inform research and development activities, government policy, biosecurity extension activities, and the commercial development of solutions to support greater adoption of farm-gate hygiene practices.

We will also publish detailed analysis of key findings from this survey as standalone e-news articles over coming months to provide further insights into drivers and opportunities for improvement.

# Record response received

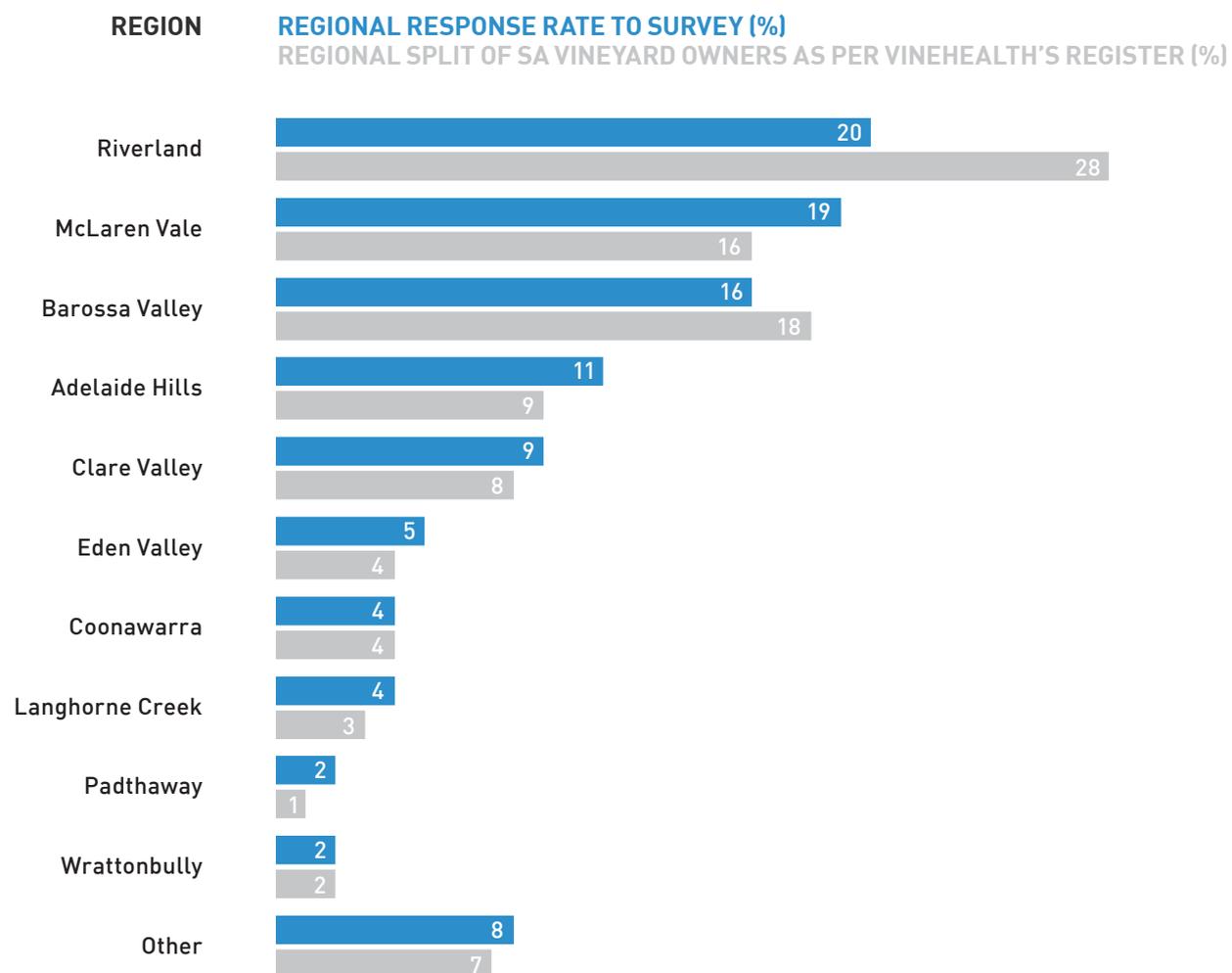
Vinehealth Australia's 2021 Vineyard Owner Survey was conducted in June/July 2021.

3,080 surveys were distributed by email and hardcopy to all South Australian vineyard owners. 449 responses were received, representing a 14.6% response rate. This was a 3.7% higher response rate than the 2018 Vineyard Owner Survey and a good improvement on the 2015 result.

The response rate by region broadly reflects the number of registered vineyard owners by region. 63% of respondents owned vineyards that were 24 hectares or less in size.

Recognising that growers owning 24 hectares or less of vineyard only make up 27% of the planted area in SA, analysis of results also considered if responses based on the size of vineyard owned/operated were statistically significant to the 95% confidence interval.

This, together with the strong response rate, provides confidence that the results of the survey deliver a balanced viewpoint.

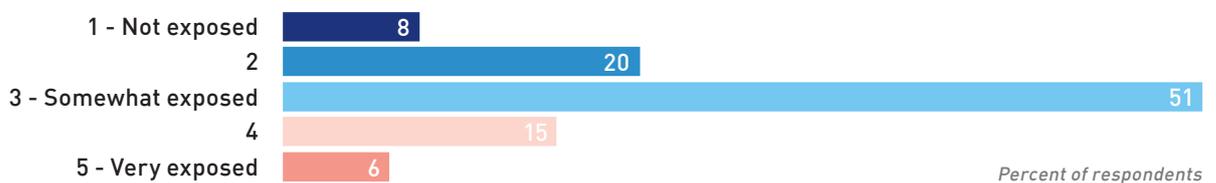


# Risk, pests and attitudes

## Exposure to biosecurity risk

Question: How exposed do you think your business is to biosecurity risk (impact from a pest, disease or weed)?

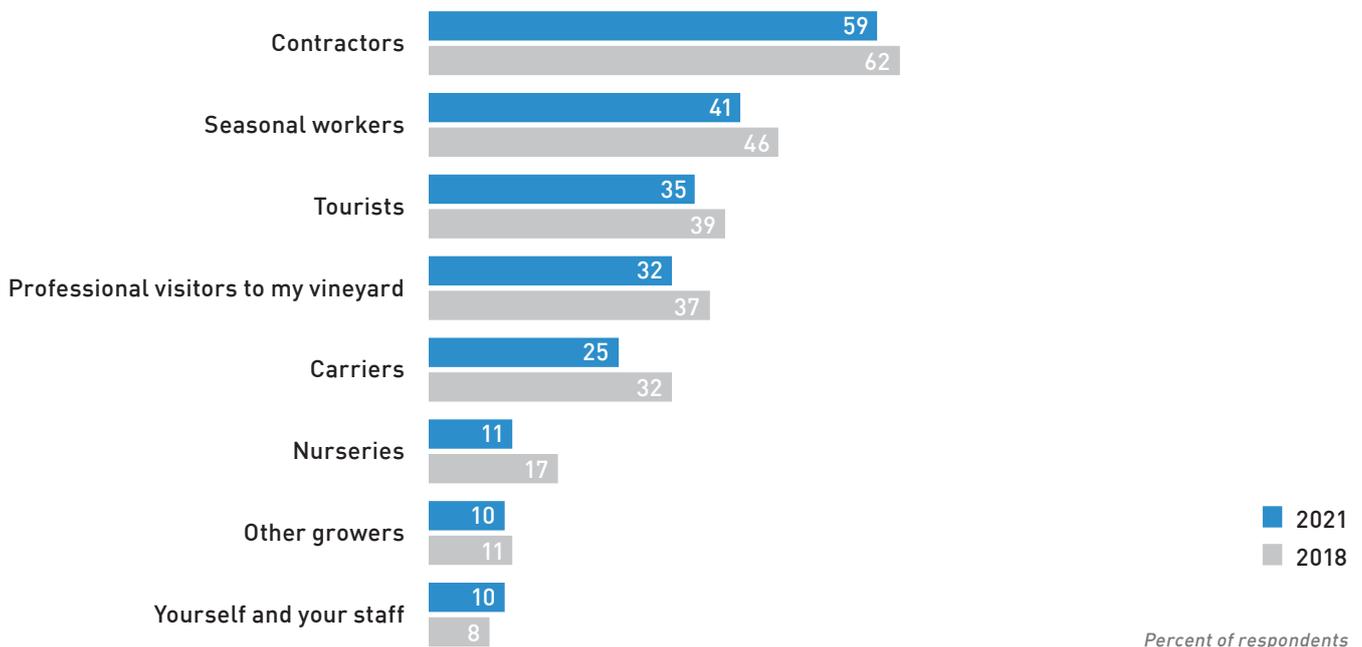
- 72% of respondents felt 'somewhat exposed' to 'very exposed' to a biosecurity threat
- 'Not exposed' respondents indicated that their vineyard was isolated
- 'Very exposed' respondents indicated:
  - A high use of contract labor, machinery and equipment
  - A high dependency on purchasing fruit from higher risk areas
  - Plantings on own rooted vines
  - A lack of fencing around vineyards adjacent to tourism areas
- Of interest, respondents who owned 100 ha or more of vineyards had a significantly higher risk rating of 3.2, compared with 2.9 for vineyard owners with less than 100 ha



## Pest introduction

Question: Who do you think is most likely to introduce pests, diseases or weeds, (e.g. phylloxera) into your vineyard?

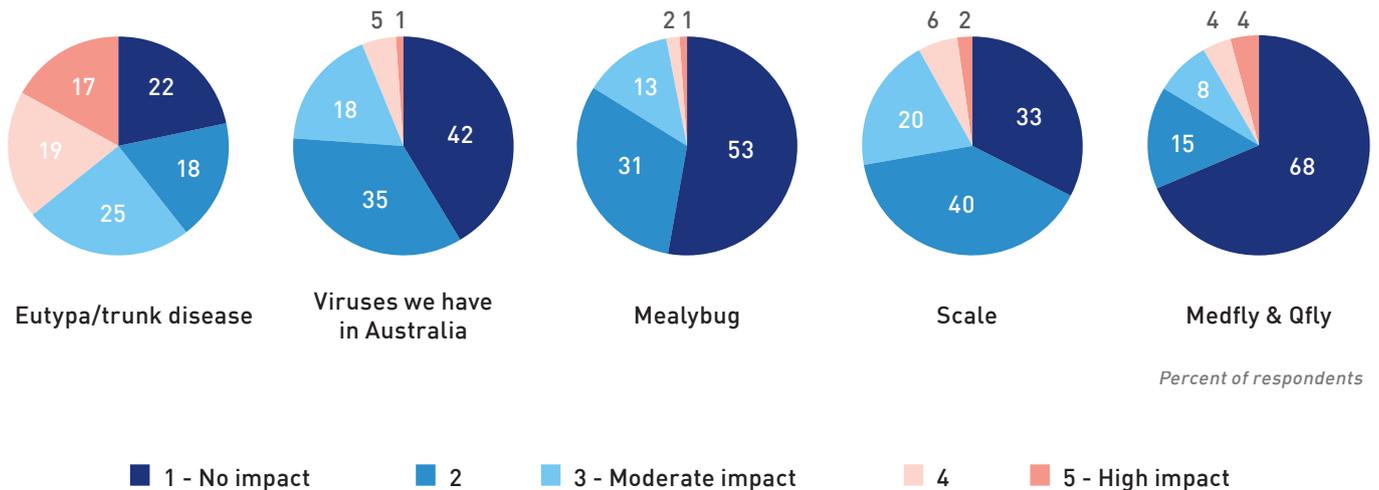
- Contractors and seasonal workers were identified in both 2021 and 2018 as most likely to introduce pests, diseases or weeds into a vineyard
- Responses were similar in 2021 as compared to 2018
- 'Yourself and your staff' was the only vector rated more likely in 2021 compared to 2018 to introduce a pest. However this is still rated at a very low level and does not reflect the opportunity for vineyard owners to control the conditions of entry to their property
- Carriers and nurseries saw the largest decrease from 2018 to 2021 in terms of likelihood of introducing a pest, weed or disease into a vineyard



## Endemic vine health issues

Question: How much do various endemic vine health issues impact your vineyard sustainability now?

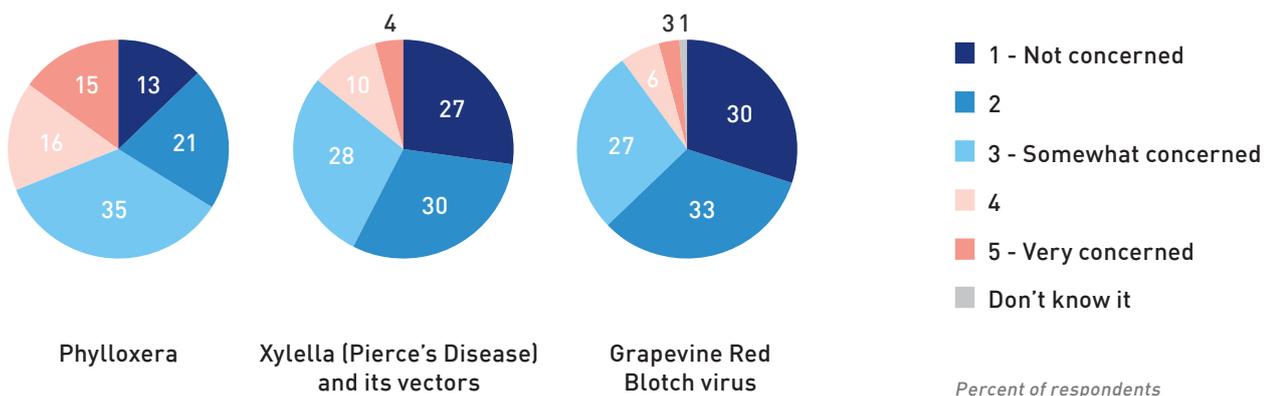
- Eutypa/trunk disease was rated as having the highest overall impact, which aligns with current industry sentiment
- Of the respondents who rated Medfly and Qfly as high impact (rating 5), 70% were vineyard owners from the Riverland
- The impact rating for Viruses was significantly higher for large vineyards (100 ha or more) at 2.3 compared to smaller vineyards (less than 100 ha) at 1.9
- The impact rating patterns for Mealybug and Scale are relatively similar to that for Viruses, noting that both are vectors of Viruses
- Other endemic issues reported were borers, earwigs, snails and kangaroos



## Exotic vine health issues

Question: How concerned are you about the potential impact of each of the following vine health issues on your long-term vineyard sustainability?

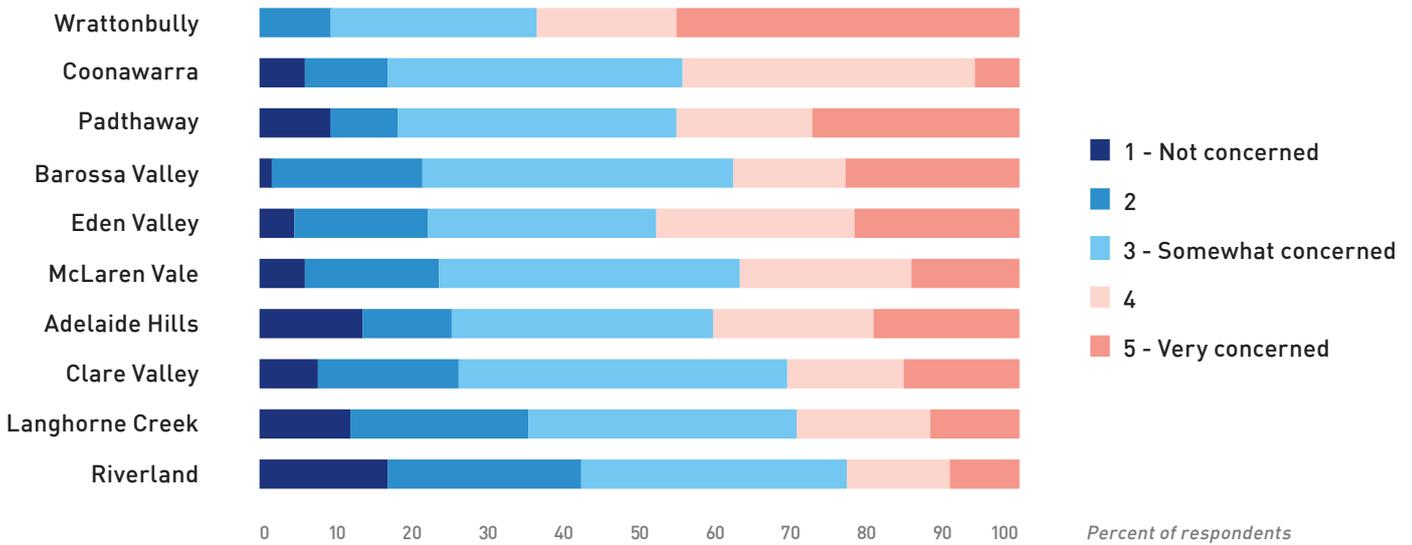
- Respondents rated phylloxera of highest concern
- The pattern of impact ratings for Xylella and Grapevine Red Blotch virus was closely aligned, potentially suggesting lower awareness of these pests and that, unlike phylloxera, they are not present in Australia
- Significantly higher concern ratings were reported for phylloxera and Xylella by large vineyard owners (100 ha or more) as compared to smaller owners (less than 100 ha)
- Other exotic issues reported were phytoplasmas and Esca



## Phylloxera

In terms of concern expressed by different regions about the potential impact of phylloxera:

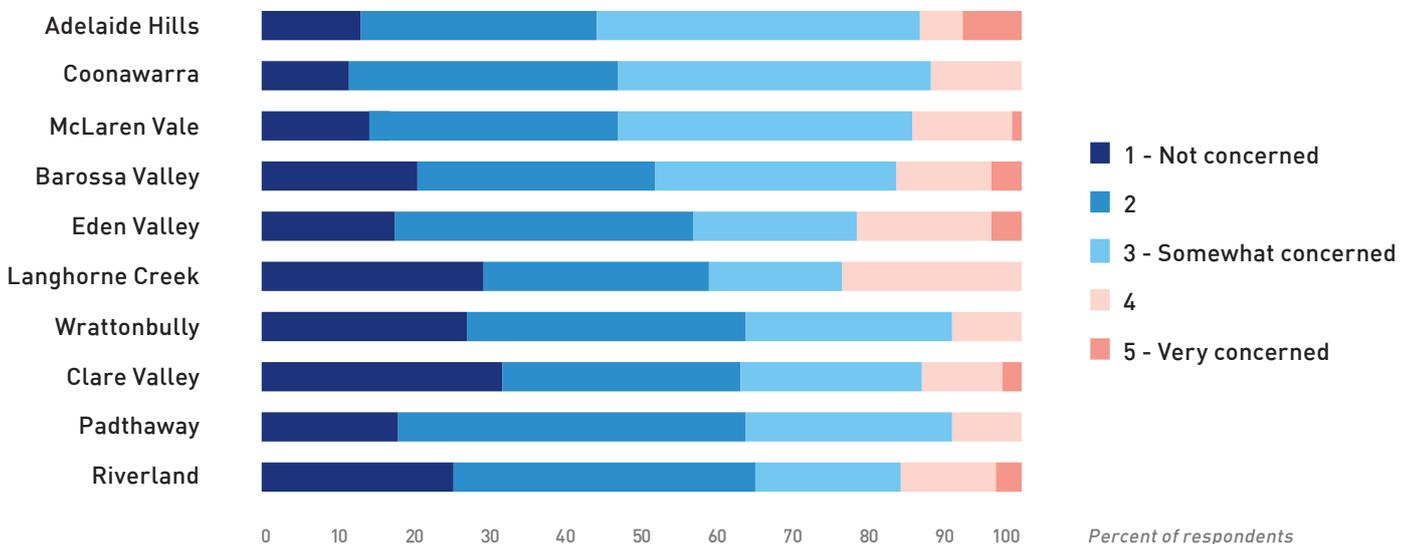
- Coonawarra, Wrattenbully and Padthaway each had greater than 80% of their respondents showing concern (ratings 3, 4 or 5) for phylloxera, potentially reflecting their proximity to the Victorian border and Phylloxera Infested Zones, and regional winery capacity
- The region least concerned about phylloxera was the Riverland, potentially due to the perception regarding phylloxera survival in this inland environment and high usage of rootstocks (primarily selected for purposes other than phylloxera resistance and prior to specific phylloxera strain-rootstock information being available)



## Xylella

In terms of concern expressed by different regions about the potential impact of Xylella:

- Across all SA regions, 35-55% of respondents showed concern (ratings 3, 4 or 5) for Xylella
- This lower level of concern as compared with phylloxera (60-90%), may reflect that Xylella has not been found in Australia and is therefore less of an immediate concern. It highlights a clear need to boost industry awareness of the significant impact of Xylella, as experienced by the Californian wine industry and in other crops such as olives in Italy

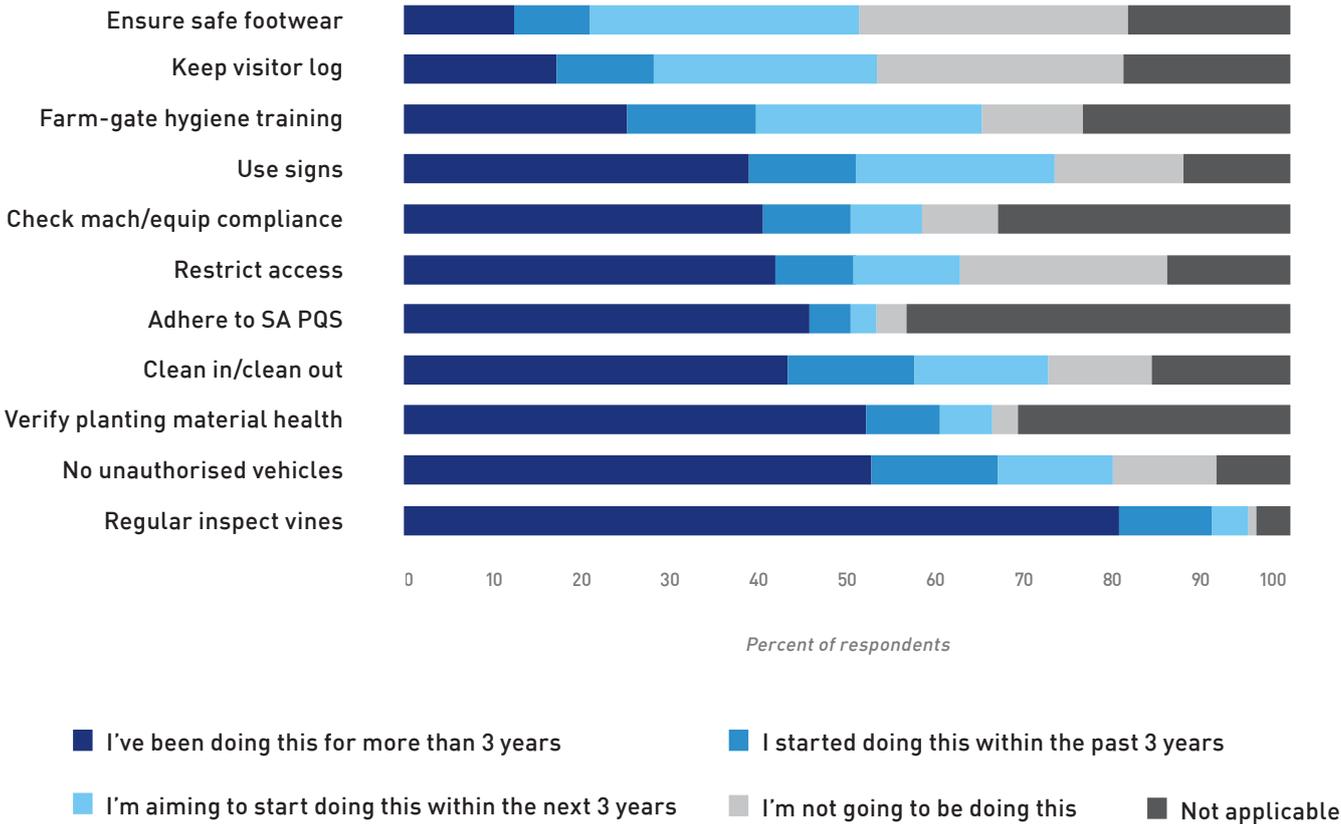


# What are vineyard owners doing?

## Farm-gate hygiene activities

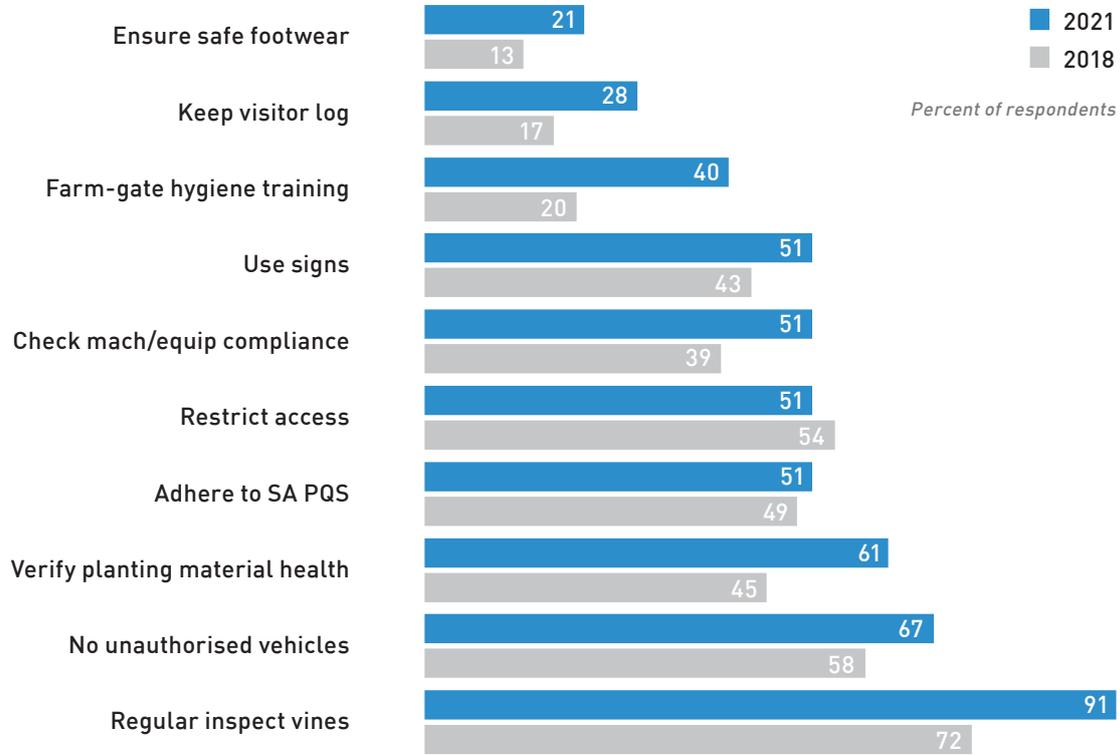
Question: Which of these key farm-gate hygiene activities do you have in place at the vineyard(s) you own or manage?

- Regularly inspecting vines, followed by restricting unauthorised vehicles entering the property, are the activities being undertaken by most respondents at present
- Adhering to a clean in/clean out policy, restricting unauthorised vehicles from entering the property and delivering farm-gate hygiene training, were activities most addressed by respondents over the last 3 years
- Ensuring safe footwear, keeping a visitor log, delivering farm-gate hygiene training to staff and contractors, and use of signs, were all activities identified by more than 20% of respondents as those that they were likely to start doing within the next 3 years. This shows excellent intent and an opportunity for Vinehealth to support growers to convert intent into action
- However, ensuring safe footwear, keeping a visitor log or restricting access, were identified by approximately 25-30% of respondents as activities that were not going to be done. Barriers to adoption need to be addressed
- Pleasingly, in addition to regularly inspecting vines, adherence to the SA Plant Quarantine Standard and verification of the health status of planting material is being undertaken by most respondents where applicable (i.e., importing into SA and planting)



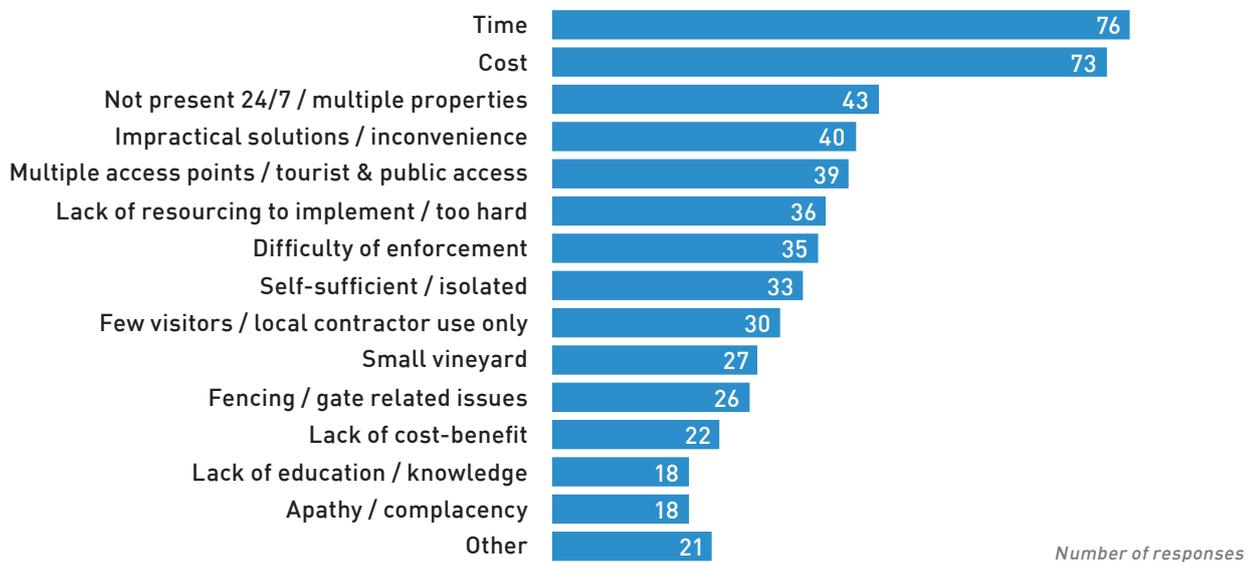
## Comparison of current adoption levels of key farm-gate hygiene activities in 2021 compared to 2018

- The adoption of all farm-gate hygiene practices (except restricting access to vineyards) has increased from 2018 to 2021
  - A large increase of approximately 20% was seen for regularly inspecting vines and delivering farm-gate hygiene training for staff and contractors, followed closely by a 16% increase in vineyard owners verifying the health status of planting material



## Barriers to farm-gate hygiene

The top three barriers preventing vineyard owners from putting in place farm-gate hygiene practices were identified as cost, time, and being low risk due to having few visitors, being self-sufficient in terms of inputs, and only using local contractors if needed. These results confirm views previously conveyed by industry to Vinehealth on barriers to adoption of farm-gate practices.

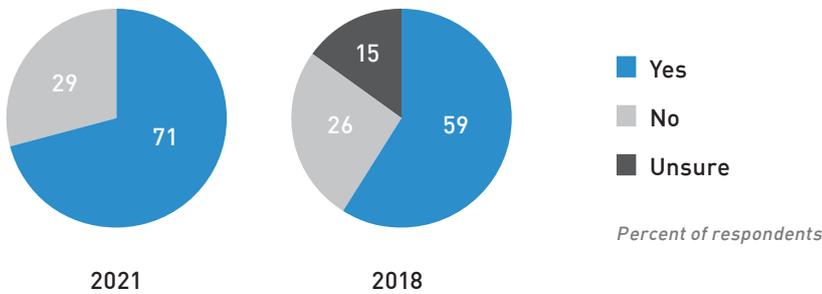


## Rootstocks

**Question: If you are planning to plant new vineyards in the next 5 years, are you likely to use rootstocks for all or some of the area?**

For those planning to plant new vineyards in the next 5 years, there was an overwhelming desire to use rootstocks and this response was 12% higher in 2021 than in 2018.

Respondents with smaller vineyards (less than 100 ha) reported a slightly higher (but not significant) likelihood of using rootstocks in the next 5 years as compared to large vineyard owners (100 ha or more).



The major reasons reported for using rootstocks were:

- Pest resistance
- Climate change, drought and salt tolerance, water use efficiency
- Consistency of, or increased yield and fruit set

The main reasons reported for not using rootstocks were:

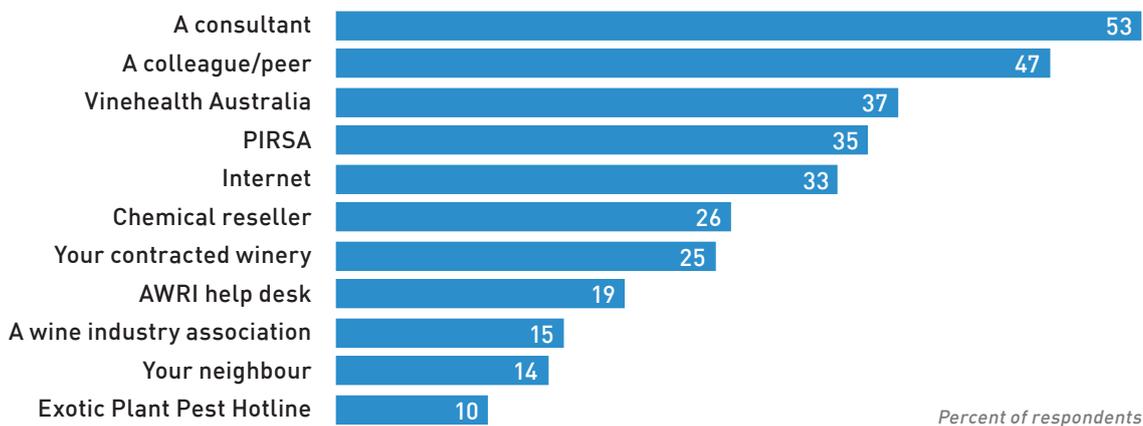
- Preference for wine quality from own roots
- Cost of rootstocks
- Lack of pest issues
- Difficulty in sourcing required clone/rootstock and lack of information on appropriate scion/rootstock

## Seeking help

**Question: If you saw an unfamiliar pest, disease or weed in your vineyard, who would you seek help from?**

97% of respondents indicated they would seek help to identify an unfamiliar pest, disease or weed in their vineyard, up 5% from 2018.

When asked who they would seek help from, a consultant or a colleague/peer were the most common responses. Help is least likely to be sought from the Exotic Plant Pest Hotline.

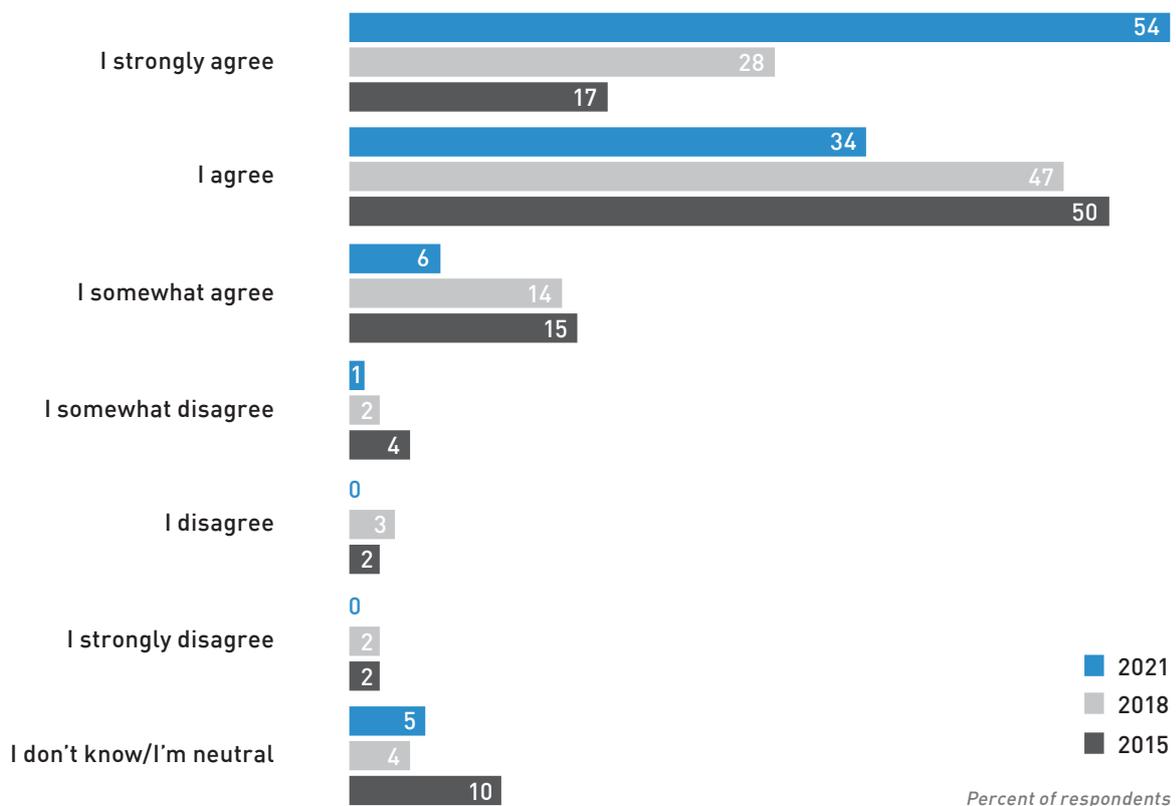


# Strong support for Vinehealth Australia

## Vinehealth Australia's role

Question: I believe Vinehealth Australia's activities are vital in protecting South Australia's vineyards and the wine industry against significant pests and diseases

- 94% responded favourably (strongly agree, agree, somewhat agree) in 2021, compared to 89% in 2018, and 82% in 2015
- The 'strongly agree' category showed an increase of 26% from 2018 to 2021, and an increase of 37% from 2015 to 2021
- Unfavourable responses (strongly disagree, disagree, somewhat disagree) showed a 6% decrease from 2018 to 2021, and a 7% decrease from 2015 to 2021
- 'I don't know' responses showed a 3% decrease from 2018 to 2021 and a 9% decrease from 2015 to 2021



## Communication

When asked, 'do you agree that Vinehealth Australia is a trusted source of biosecurity information', 90% of respondents said yes.



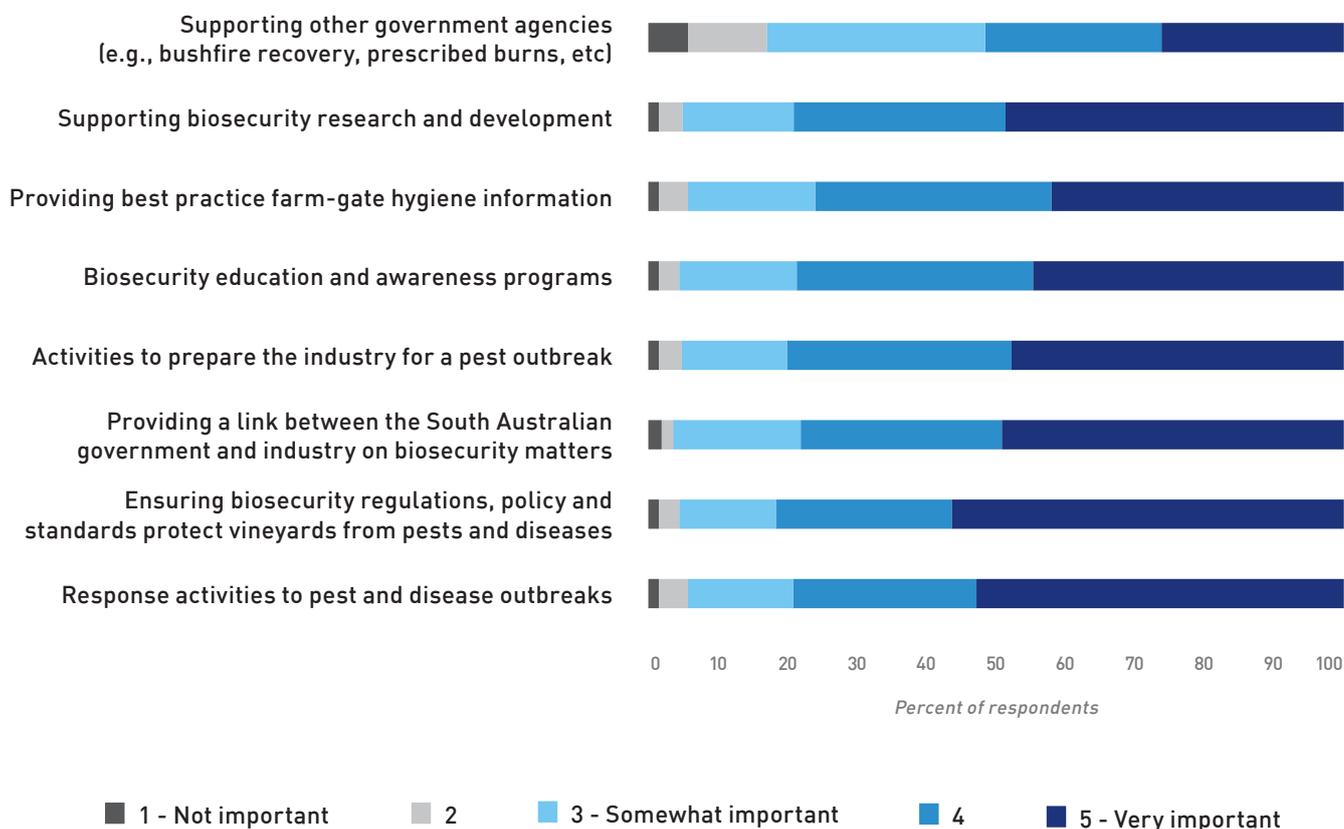
In terms of how Vinehealth Australia should communicate:

- 87% agree that direct emails are the best form of communication
- 35% would like to see text messaging introduced
- Only 10% would use social media for important biosecurity information

## Vinehealth's activities and functions

**Question: Of Vinehealth Australia's key biosecurity activities, please rank each area's importance to your business**

There was deep and broad support for all key activities and functions of Vinehealth, with 95% or more of respondents reporting a level of importance (ratings 3, 4 or 5) for all functions, with the exception of 'Supporting other government agencies' having 83% support.



When asked what they liked MOST about Vinehealth Australia, 251 respondents provided free form answers, the majority of which can be grouped into three main categories:

1. Valuable communications and awareness, tools, and online resources
2. Singular focus on all aspects of biosecurity to protect South Australian vineyards
3. A strong, independent watchdog on biosecurity with a can-do attitude and strong customer service

When asked what they liked LEAST about Vinehealth Australia, 63 respondents provided free form answers, which can be grouped into four categories:

1. Levy – requested more information on expenditure including government contributions, insufficient resources as a function of the current levy rate, value of services
2. Communications – too much, too little, repetitive communications, communication channels used, surveys
3. Strategic – lack of recognition/support by other industry bodies, not national, name
4. Activities – lack of policing what we preach in terms of farm-gate hygiene practices, too much focus on large operators, don't provide contact details of growers to wine regions



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