



National
Retail
Association

Women and the Australian Retail Industry

Industry Report
April 2016



About the National Retail Association (NRA)

The NRA is Australia's largest and most representative retail industry organisation. For almost 100 years, the NRA has represented the interests of the retail, fast food and broader service sector, delivering critical information and advice to thousands of businesses nationally. NRA's services are delivered by a team of highly trained and well qualified people, in-house with decades of retail-specific knowledge and experience.

About the NRA Business & Industry Intelligence Unit

The NRA has a dedicated Business and Industry Intelligence Unit that provides insight into the ever-changing retail environment, how businesses are adjusting to change, and what they are doing to remain relevant in an increasingly digital marketplace.

With extensive experience and expertise across the Australian retail landscape, team members in the Business & Industry Intelligence Unit have the insight and technical support needed to deliver a broad range of advice to retailers, as well as businesses and agencies that service this diverse industry.

The team has the knowledge and technical experience to understand and translate the current and future needs of retail businesses, and through deep engagement and evidence-based decision making, can facilitate genuine and reliable collaborations between retailers, service providers and government.

About Cameron Meiklejohn, NRA Industry Research & Data Analyst

Cameron has been working in the area of market and social research for more than a decade, with experience across the private, government and academic sectors. His experience is diverse, ranging from brand management, media relations, and data analysis.

With a constantly evolving role, to meet the needs of members and industry, Cameron is responsible for analysing and interpreting industry, economic and social data, to better understand the retail landscape and its position within the broader economy.

Disclaimer

While extreme care and diligence has been exercised in the preparation of this report, the National Retail Association does not warrant the accuracy of the information contained within and accepts no liability for any loss or damage that may be suffered as result of reliance on this information. Any projection can be impacted by unforeseen variables used in the analysis, and as such, no warranty is given that a particular set of results will be achieved.



Women and the Australian Retail Industry

April 2016

Cameron Meiklejohn
Industry Research & Data Analyst
National Retail Association

This report has been prepared by the National Retail Association (NRA) to provide an overview of the role that women perform in the modern Australian retail workforce, as well as some of the barriers and challenges they continue to experience. This information has been generated as a basic overview of the available data only. Key insights are as follows:

<p><i>Second Largest Employer</i></p> <p>The NRA estimates that retail is the second largest employer of women nationally, and the largest employer of women aged under twenty-five (25). Further, a significant number of women (37.1 per cent), work in non-sales roles, including management, human resources, marketing and accounting.</p>	<p><i>Education & Qualifications</i></p> <p>Almost two thirds (60.3 per cent) of women working in the retail industry, aged twenty-five and over, have no qualifications beyond high school. This is the highest proportion of any industry across Australia.</p>
<p><i>Lone Parents</i></p> <p>Analysis conducted by the NRA suggests that 16.4 per cent of mothers in the Australian retail industry, aged between 18 and 54, are lone parents. In 2011, it is estimated that almost 40,000 women, employed in retail, were single parents, responsible for the care of at least one dependent child.</p>	<p><i>Industry View</i></p> <p>The Australian retail industry continues to be a significant employer of women in Australia, particularly at younger age groups. A large number of women in the industry are also employed in professional roles, while retail has the fourth highest number of women in CEO positions across all industries.</p>

Disclaimer

While extreme care and diligence has been exercised in the preparation of this report, the National Retail Association does not warrant the accuracy of the information contained within and accepts no liability for any loss or damage that may be suffered as result of reliance on this information. Any projection can be impacted by unforeseen variables used in the analysis, and as such, no warranty is given that a particular set of results will be achieved.



Retail Workforce Demographics

When people think about employment opportunities within the retail industry, the first thought is to consider their own instore experience, and the people they see, such as sales assistants, checkout operators and store managers. However, within the modern Australian retail industry, the job opportunities, especially those available to women, are diverse, with a wide-range of roles available to those individuals seeking a challenging and rewarding career that extends well beyond the shop floor.

Specifically, the retail industry employs more than 600,000 women across Australia, making it the second largest employer of females in the country. However, the industry provides work opportunities for more than 1 in 4 (26.7 per cent) young women (15-24), making it the largest female youth employer in the country.

Jobs in Retail

Although many women are employed as frontline sales assistants and store attendants, which is a significant proportion of the total retail workforce in Australia, it is important to acknowledge that more than 40 per cent of retail jobs held by women are in non-sales positions.

Retail and Professional Roles

The retail industry provides a broad variety of employment opportunities that are in non-sales positions, including numerous professional occupations. With the increasing importance of data, and in particular the ability to transform this information into actionable insights, the demand for ICT professionals, programmers, database managers, and data scientists, is expanding substantially. Indeed, a number of women are currently employed in these, or similar roles, across Australia, with analysis conducted by the NRA suggesting that more than 2,000 women work in various information and communication technology roles in the retail industry. Further, almost 11,000 are employed in professional roles including accounting, human resources, legal, and advertising, marketing and public relations.

Women in Management

As well as providing access to a number of professional occupations, the Australian retail industry also enables women to access senior level management positions, including those of Chief Executive Officer and Managing Director. Indeed, retail has one of the highest proportions of full time female managers with 40.4 per cent of all managerial positions being filled by women. While this does not reflect the total proportion of all women employed within the retail industry, or the influence of female consumers, it is encouraging that this figure has been rising steadily across the last decade. Further, a career in retail can also lead to positions of influence and authority, including those of CEO and Managing Director.

Analysis conducted by the NRA indicates that of all people employed as full time CEOs or Managing Directors in the Australian retail industry, almost one quarter (24.8 per cent) are female. While this

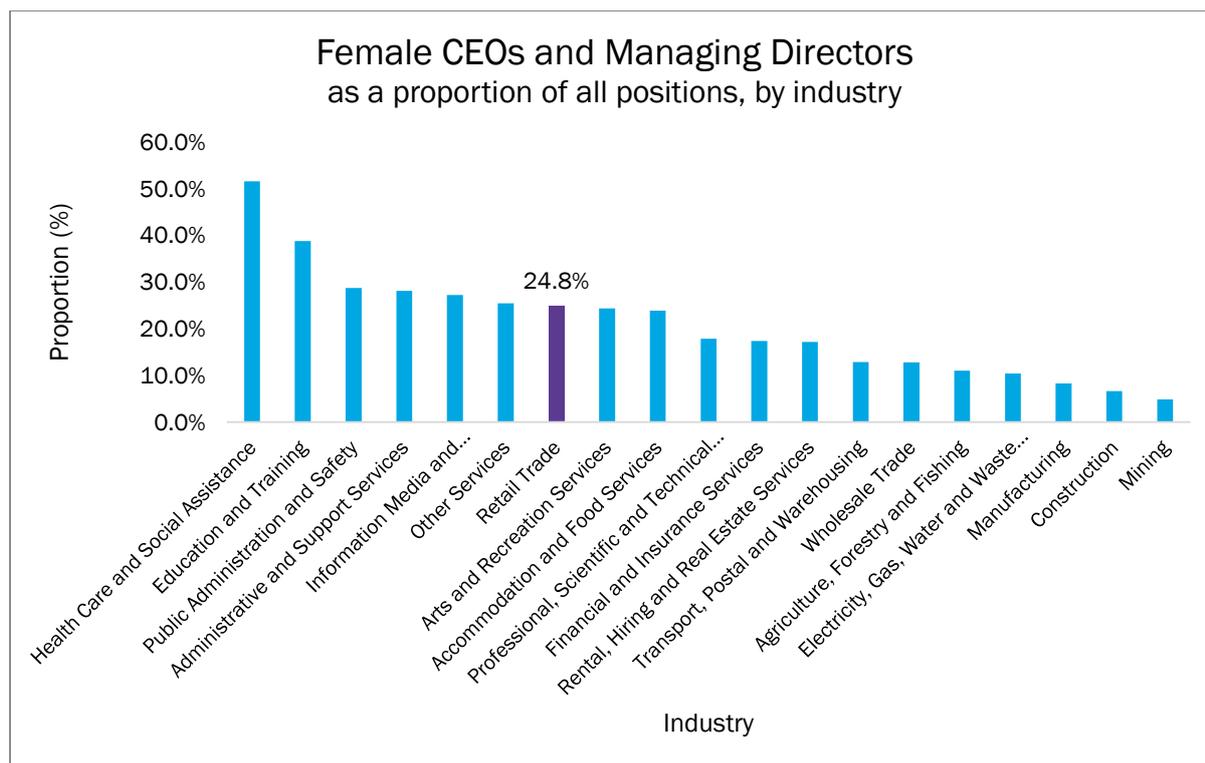
pg. 3

Disclaimer

While extreme care and diligence has been exercised in the preparation of this report, the National Retail Association does not warrant the accuracy of the information contained within and accepts no liability for any loss or damage that may be suffered as result of reliance on this information. Any projection can be impacted by unforeseen variables used in the analysis, and as such, no warranty is given that a particular set of results will be achieved.



is above the national average for all industries, which is approximately 21.0 per cent, as indicated in the chart below, it is certain that the retail industry can further tap the skills and experience of highly motivated women that have the capacity to take on senior executive positions.



Source: ABS, NRA

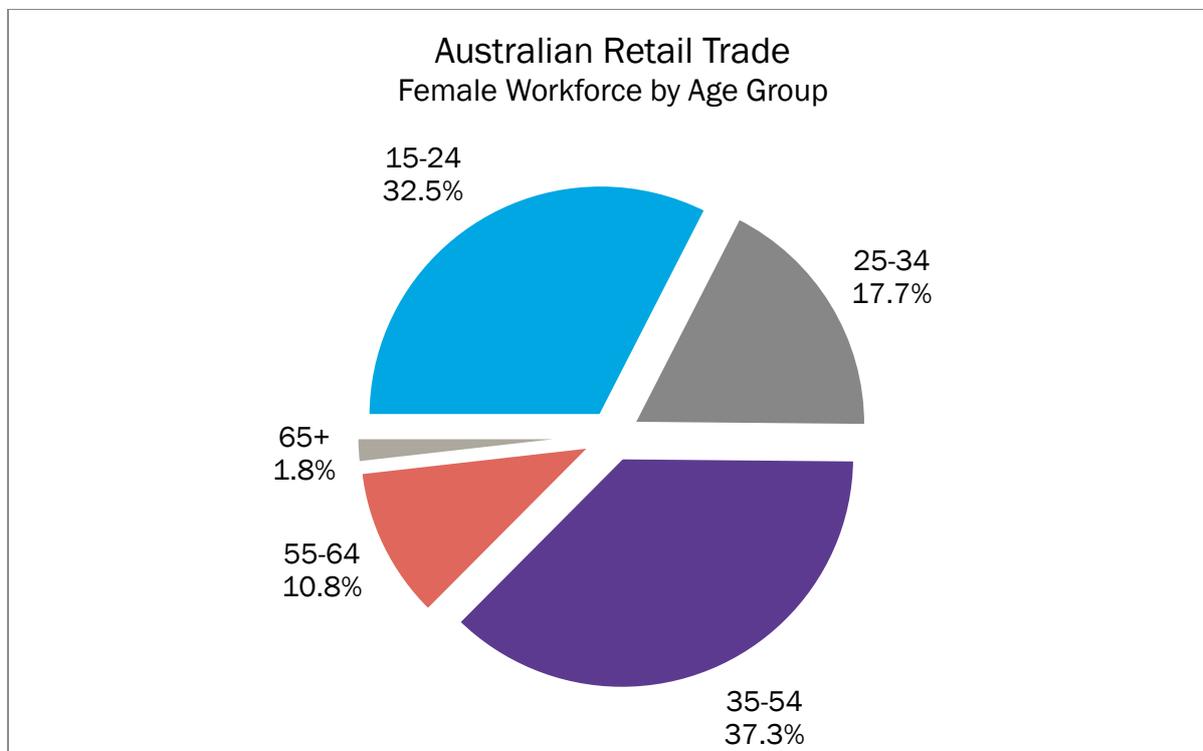
The NRA encourages businesses to identify, retain, develop and advance the career opportunities of high potential women working with the industry, while also seeking out opportunities to further engage women in the development of the retail industry in Australia.

Retail Employees by Age

For many people, retail is the industry where they will gain their first job. It is in these entry level roles that they will learn and apply key employability skills, which will be carried with them throughout their entire working life, and across industries. It is therefore unsurprising that the retail industry in Australia has the largest youth workforce, employing almost one quarter (22.3 per cent) of all people aged 15-24. For women, the proportion is slightly higher, with 26.7 per cent of all females, aged 15-24 working in the retail industry.

Disclaimer

While extreme care and diligence has been exercised in the preparation of this report, the National Retail Association does not warrant the accuracy of the information contained within and accepts no liability for any loss or damage that may be suffered as result of reliance on this information. Any projection can be impacted by unforeseen variables used in the analysis, and as such, no warranty is given that a particular set of results will be achieved.



Source: ABS, NRA

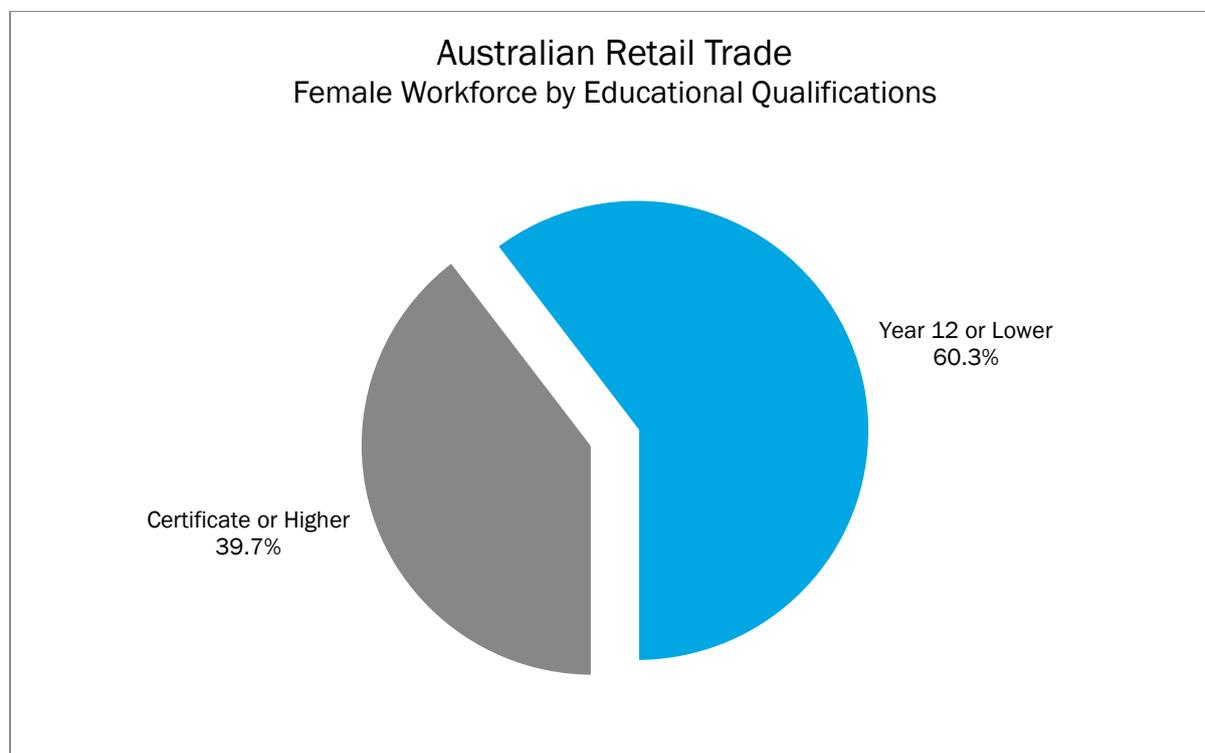
Retail and Educational Training

While retail is an industry where young people often gain a first exposure to the workforce, it is also an industry that has a range of employment opportunities that require various tertiary and vocational qualifications. Across Australia, almost 1 in 7 females working in retail, aged over 24, are University graduates. Further, of those individuals that have University degrees, almost 20 per cent have an advanced level qualification, such as a Masters, Professional Degree or Doctorate. However, despite a significant number of female employees having advanced qualifications, it is also important to indicate that a number of women in the retail industry have had limited access to professional development and training.

Analysis conducted by the NRA indicates that 60.3 per cent of female retail employees, working across Australia, have a Year 12 level of education or lower. Significantly, this is the highest proportion of female workers, with no post high school qualification, of any industry across Australia.

Disclaimer

While extreme care and diligence has been exercised in the preparation of this report, the National Retail Association does not warrant the accuracy of the information contained within and accepts no liability for any loss or damage that may be suffered as result of reliance on this information. Any projection can be impacted by unforeseen variables used in the analysis, and as such, no warranty is given that a particular set of results will be achieved.



Source: ABS, NRA

Full-Time and Part-Time Work

The retail industry provides individuals with a range of flexible work opportunities, including evening and weekend shifts, providing employment conditions for people needing to balance family commitments, or other lifestyle choices that require non-traditional work hours. Across Australia, women working in retail are more likely to be employed in part-time roles. Indeed, almost two-thirds (61.8 per cent) of all women working in the retail industry are employed in part-time positions, particularly those working in sales roles. However, of those employed in part-time roles, 40.4 per cent are aged 15-24, highlighting another benefit of the flexible work conditions offered in retail, namely: the opportunity for students to schedule shifts around school, TAFE, University, or other educational and training commitments. Further, an additional 12.3 per cent of part-time workers are aged over 55, with retail often presenting as a suitable option to earn additional income prior to retirement, or as a transitional role after retiring from full-time employment in another industry.

Retail, Women and Parenting

Given the high number of women that are employed in the Australian retail industry, it is unsurprising that a significant number of total births, which occur in Australia each year, are to women working in retail businesses. Providing these women with appropriate support when they transition between work and time caring for their child, as well as when they are ready to return

Disclaimer

While extreme care and diligence has been exercised in the preparation of this report, the National Retail Association does not warrant the accuracy of the information contained within and accepts no liability for any loss or damage that may be suffered as result of reliance on this information. Any projection can be impacted by unforeseen variables used in the analysis, and as such, no warranty is given that a particular set of results will be achieved.



to the workforce, is critical in acknowledging the key role women perform across the Australian retail industry. Specifically, the transition between work and having a baby can present a number of challenges and difficulties for some women, while the decision to return to the workforce can be equally difficult to navigate. Ensuring that the workplace is supportive of women, and their parenting commitments, can be critical for businesses wanting to attract, and retain, highly skilled and motivated workers.

Working While Pregnant

Approximately 11.5 per cent of all women that continue working while pregnant are employed in the retail industry, which accounted for more than 41,000 women in 2011. This places the retail industry as having the second highest number of pregnancies, of all industries in Australia.

Importantly, working while pregnant can present a number of issues for women in the workplace, one of which is discrimination. Data collected by the ABS suggests that across all industries almost one in five (19 per cent) women, who were working while pregnant, experienced some form of workplace discrimination¹. The most common forms of discrimination that were reported, included the following:

- missing out on an opportunity for promotion;
- missing out on training or development opportunities; and
- receiving inappropriate or negative comments from a manager or supervisor.

Providing employees with knowledge and tools that enable them to identify the characteristics of workplace discrimination, as well as appropriate responses to this behaviour, is critical in maintaining a workplace that is respectful and safe for all team members.

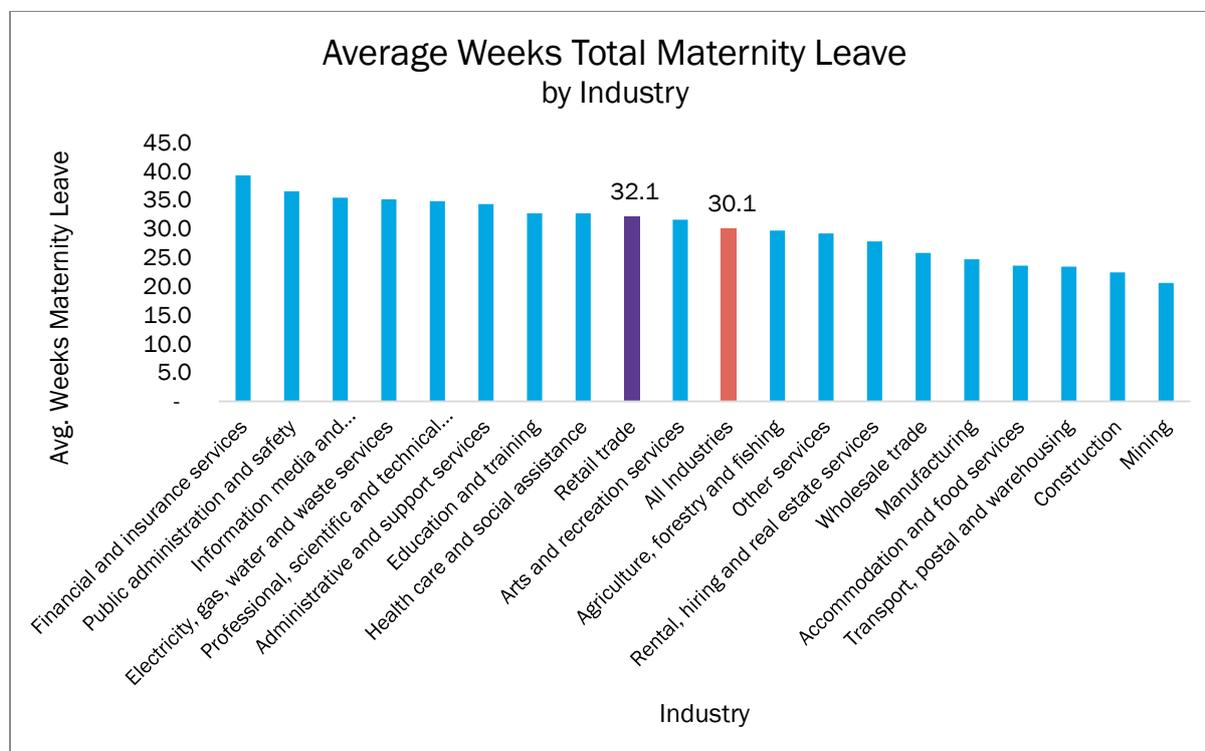
Maternity Leave

All employees in Australia are entitled to unpaid parental leave, providing that they have been working for their current employer for at least twelve (12) months. In particular, this leave provides an employee with the guarantee that they can return to their pre-parental leave position following time away from the workforce to care for a child. On average, women that were employed in the retail industry while pregnant took an average of 32.1 weeks leave for the birth of a child. As indicated in the chart below, the average amount of time taken by mothers across all industries was 30.1 weeks.

¹ 4913.0 - Pregnancy and Employment Transitions, Australia, Nov 2011

Disclaimer

While extreme care and diligence has been exercised in the preparation of this report, the National Retail Association does not warrant the accuracy of the information contained within and accepts no liability for any loss or damage that may be suffered as result of reliance on this information. Any projection can be impacted by unforeseen variables used in the analysis, and as such, no warranty is given that a particular set of results will be achieved.



Source: ABS, NRA

Returning to Work

When returning to work, following time spent caring for a child, a number of issues are often considered by mothers, but workplace flexibility can be a central concern. Essentially, the ability to appropriately balance work and family responsibilities can be paramount for many mothers when they are considering a return to paid employment following time spent caring for a child. Importantly, there is evidence to suggest that providing women with access to flexible work arrangements can be highly beneficial to businesses. Research suggests that women in flexible roles are the most productive members of the Australian workforce, delivering an additional one and a half weeks of productive work each year². Essentially, women that are provided with flexible work arrangements waste less time, and are more productive, compared with full-time colleagues. Therefore, establishing and developing a work environment that is supportive of flexible work arrangements could present retail businesses with an opportunity to access highly motivated, skilled, experienced and productive women that want to return to work following the birth of a child. Indeed, for 11.0 per cent of women, their first job following the birth of a child is in retail, making this industry one of the most common pathways back into the workforce.

² Ernst & Young. (2013). *Untapped opportunity: The role of women in unlocking Australia's productivity potential*. Sydney: Author.

Disclaimer

While extreme care and diligence has been exercised in the preparation of this report, the National Retail Association does not warrant the accuracy of the information contained within and accepts no liability for any loss or damage that may be suffered as result of reliance on this information. Any projection can be impacted by unforeseen variables used in the analysis, and as such, no warranty is given that a particular set of results will be achieved.



Lone Parents

While the statistics for lone parent families in Australia vary, it is clear that across the past twenty years, the proportion of families, headed by a single parent, has grown significantly. In particular, the vast majority of these families continue to be headed by mothers, with approximately 84.0 per cent of lone parents in Australia being women³. Within the retail industry, it is estimated that almost 40,000 women, aged between 18 and 54 are lone mothers responsible for the care of at least one dependent child. Across all industries, retail has the second highest number of lone mothers in the country, with approximately 16.4 per cent of all mothers aged between 18 and 54 being the sole provider of care to a dependent child. While the range of flexible work arrangements available in the retail industry provides opportunities for lone mothers to manage their parenting responsibilities around work commitments, it is also possible that some limitations may exist for these women.

³ 6224.0.55.001 - Labour Force, Australia: Labour Force Status and Other Characteristics of Families, Jun 2012

Disclaimer

While extreme care and diligence has been exercised in the preparation of this report, the National Retail Association does not warrant the accuracy of the information contained within and accepts no liability for any loss or damage that may be suffered as result of reliance on this information. Any projection can be impacted by unforeseen variables used in the analysis, and as such, no warranty is given that a particular set of results will be achieved.



THREE OFFICES NATIONWIDE

1800 RETAIL

QUEENSLAND HEAD OFFICE

6 Overend Street
East Brisbane QLD 4169
PO Box 1544
Coorparoo QLD 4151

VICTORIA

Junction Business Centre
Suite G02 22 St Kilda Road
St Kilda VIC 3182

NEW SOUTH WALES

PO Box Q522
QVB Sydney NSW 1230