

# RETAIL CAREERS

## Perceptions of the General Population

Jonathan Dodd, Harrie Le Roux, Samantha Grigg  
August 2023



Retail <sup>NZ</sup> GAME CHANGERS



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# SUMMARY & CONCLUSIONS

# 1

# BACKGROUND & OBJECTIVES

## Background

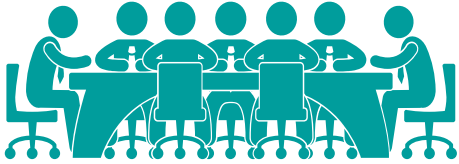
- The retail sector offers a wide range and depth of long-term skilled career options, but suffers from misperceptions that it largely consists of low-skilled shop-floor jobs. As a result, the sector suffers from a reduced pool of entrants and government policies that fail to recognise the true value and potential within the sector.

## Research Objectives

- This research was commissioned to quantify New Zealanders' attitudes and knowledge towards retail careers, to help direct an effective perception-management campaign and also to help with government policy discussions.
- By understanding what New Zealanders get right, and wrong, about retail careers, Retail NZ will be better positioned to communicate the benefits of such careers – especially if the research can help profile those most open to switching to the retail sector.



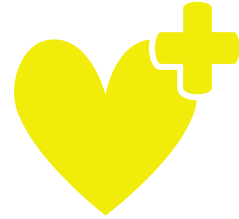
# PROFILING THE WORKFORCE



This survey confirms that the clear majority of people working in retail are NOT in shop-floor roles.



Those working in retail have been in the sector for a shorter time than most (but not all) other sectors.



Those in retail generally have the same skill levels, job satisfaction and openness to change / commitment to their current roles as everyone else.



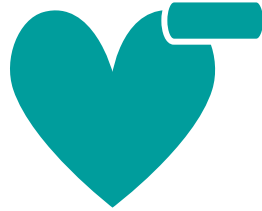
Those with higher job satisfaction and expertise (both increase with tenure) are more open to changing jobs and sectors.



# PERCEPTIONS OF THE RETAIL SECTOR



Perceptions of the retail sector are dominated by the shop-floor, understandably as this is the most public-facing part of the sector.



People are twice as likely to cite negative, rather than positive, things about the retail sector.



Those in retail generally have better opinions of retail, noting the need to be friendly and helpful, and to have a good customer service ethic.



There is a strong perception that the sector underpays staff, especially when long hours and difficult customers are factored in. This issue is also a problem for those in retail.



# THE MAIN MISPERCEPTIONS OF RETAIL

People generally underestimate the size, demand, qualifications & skill levels of retail staff.



73% underestimate the proportion of retail staff who keep getting extra upskilling and training opportunities, which is 45%.



62% incorrectly think that the retail sector is mainly female, when in fact the gender split is largely equal.



76% underestimate the skill level required in the average retail role.



73% underestimate how flexible retail work hours can be, as in fact, 43% of retail staff have flexible working hours.



31% underestimate how many new retail jobs will be created between now and 2024 (10,400), and how many jobs the sector will represent (17%).



64% underestimate the proportion of managers and professionals working in the retail sector, which is 26%.



75% underestimate what proportion of retail staff have tertiary qualifications (53%).



89% incorrectly think that other occupations such as tradies, managers and professionals had larger pay increases last year, when in fact it was those in retail.



Half of NZers don't know that the worst retail staff shortages are in digital / IT roles.

# PERCEPTIONS OF RETAIL CAREERS



Perceptions of careers in the retail sector are dominated by perceptions that retail primarily involves in-store shop-floor work.



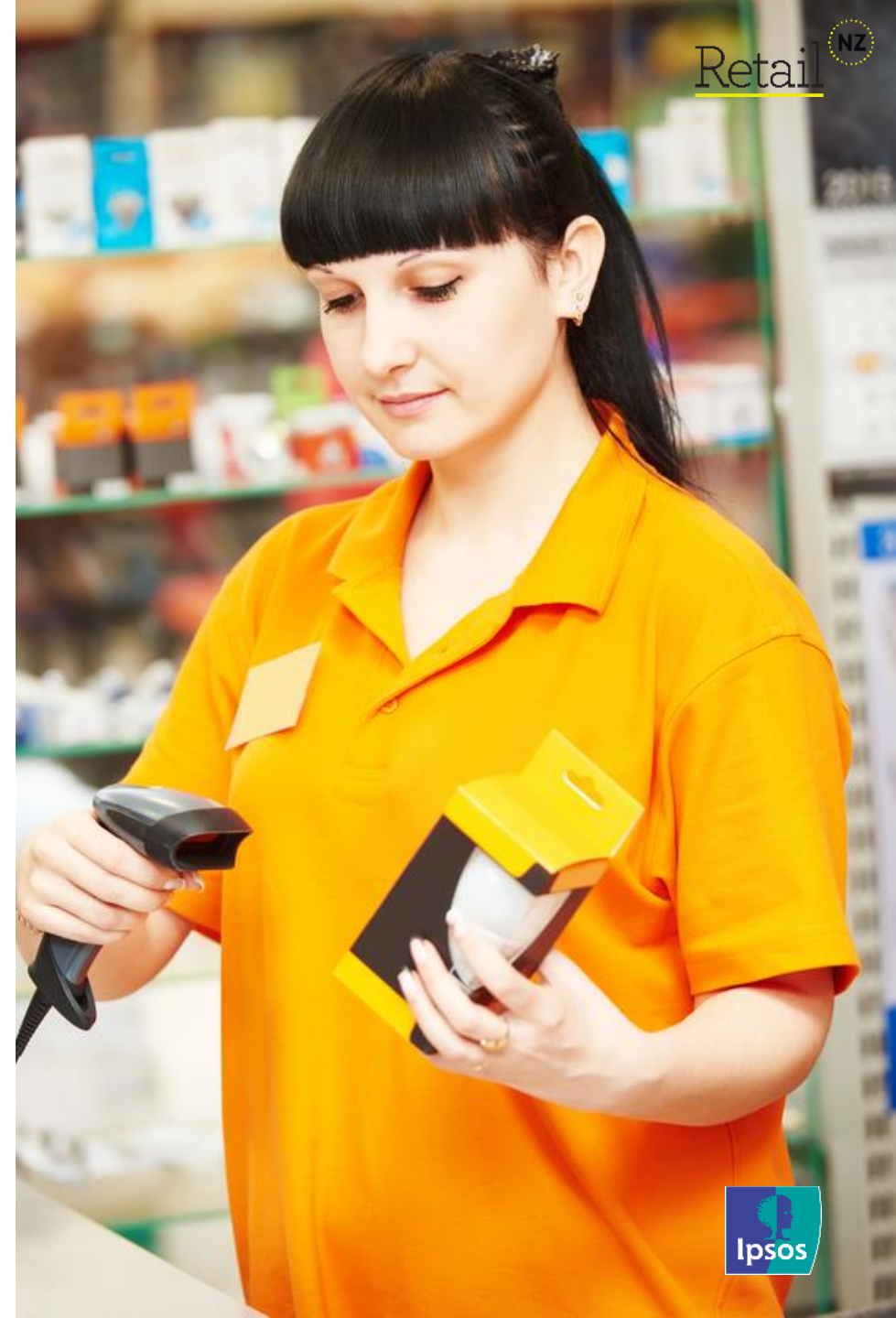
Although the special skills that frontline retail staff require are appreciated, they are undermined by perceptions of low pay and limited long-term opportunities.



Retail employees are more positive, especially in relation to the variety, service skills and opportunity in the sector.



Despite being more positive about their jobs, those in retail are almost as likely as others to cite low pay and limited career opportunities.





# ATTRACTING PEOPLE TO RETAIL CAREERS



Overall, people want jobs that enable them to focus on doing things right, in a caring, collaborative team that fosters creativity and new opportunities.



The retail sector is not a very attractive career option for most people, being seen to offer diverse colleagues but low pay, high hours and dull jobs.



People seek good pay, interesting work and a work-life balance.



The greatest potential for attracting new entrants to the retail sector lies in those currently working in the **healthcare and social assistance sector**.

The greatest gain in attracting more workers is not going to come from those attracted to retail as they currently understand it, but to change the perceptions of those rejecting it on the basis of their inaccurate impressions.

This will require changing perceptions (or reality) concerning:

- Pay
- Work-life balance / hours of work
- Interesting work / skills
- Opportunities for career development



2

# BACKGROUND & METHODOLOGY

# OBJECTIVES & METHODOLOGY

## Research Objectives

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- By understanding what New Zealanders get right, and wrong, about retail careers, Retail NZ will be better positioned to communicate the benefits of such careers – especially if the research can help profile those most open to switching to the retail sector.

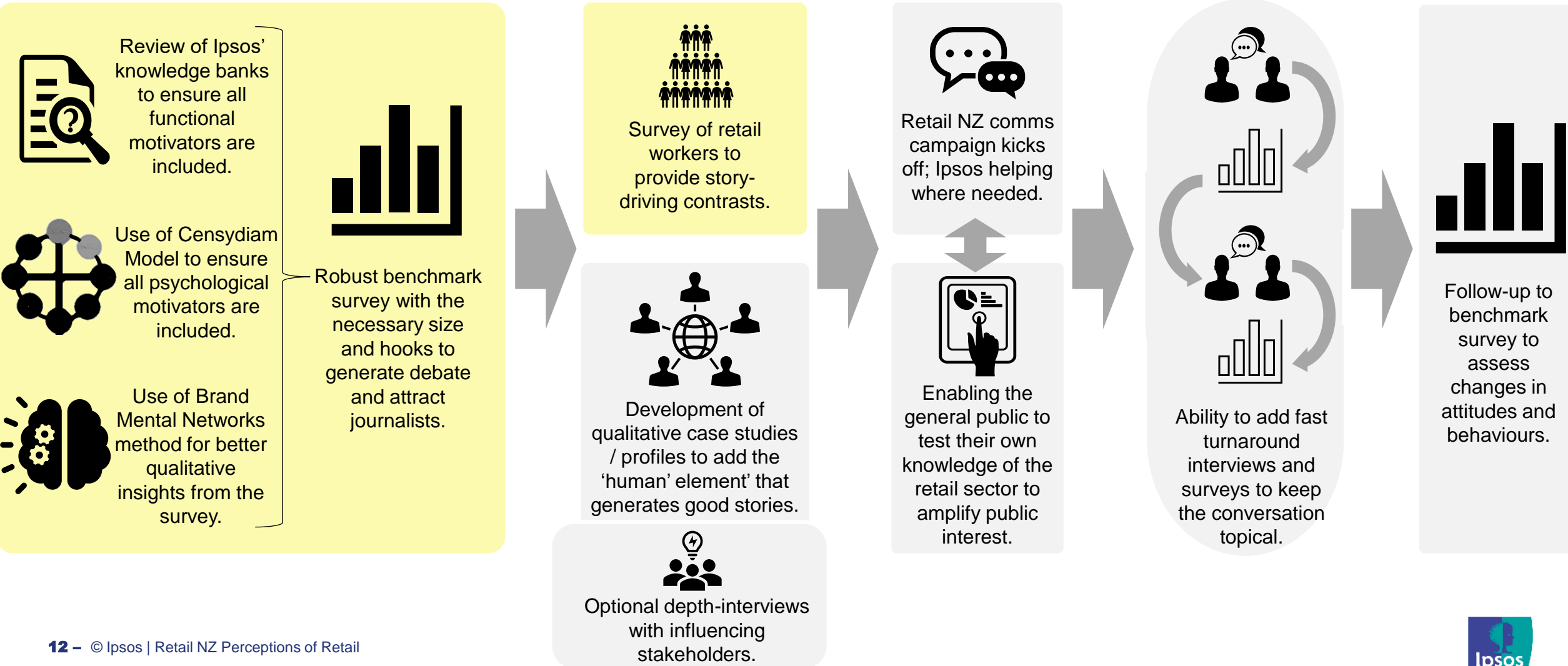
## Methodology

- This report presents the results of the first stage of a multi-stage project.
- It presents the results of an online survey of 2002 New Zealanders, conducted 13<sup>th</sup>–30<sup>th</sup> January 2023.
- Respondents had to be in at least one of the following groups: in employment; seeking employment; in tertiary study (these 3 groups comprising current or intending workers); a close family member or friend of a person in one of these groups (included as they are in a position to influence such workers' career decisions).



# PROJECT PLAN

This report combines the first two stages in a multi-stage programme.



# METHODOLOGY

## General Population Survey



Total completes for this survey were 2,002, meaning the maximum margin of error at the 95% confidence level is 2.2%



Fieldwork was conducted between 13<sup>th</sup> and 30<sup>th</sup> January 2023.



Respondents were surveyed through an online questionnaire via Ipsos and approved partner panels.



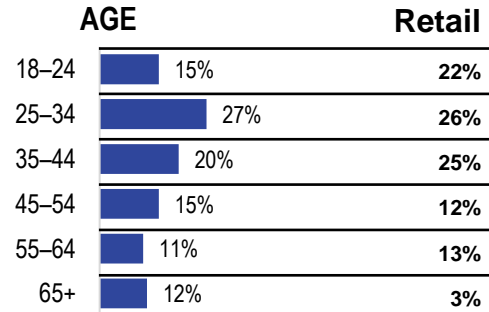
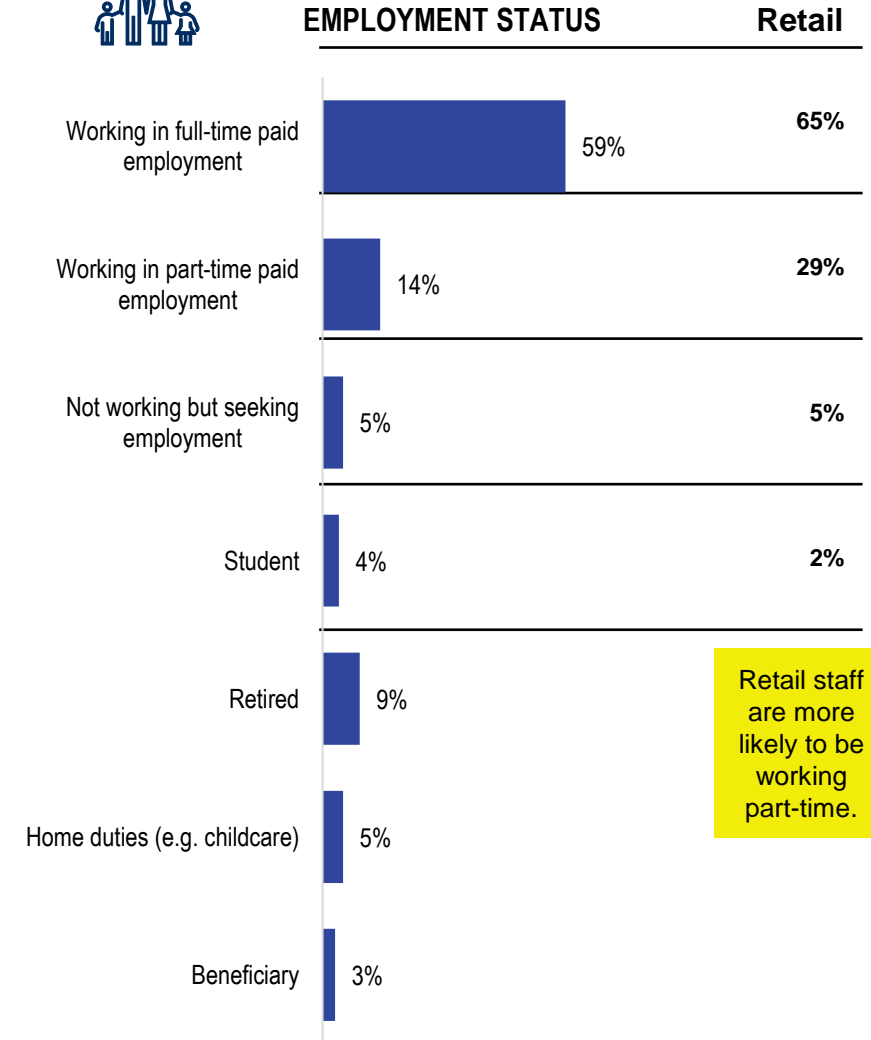
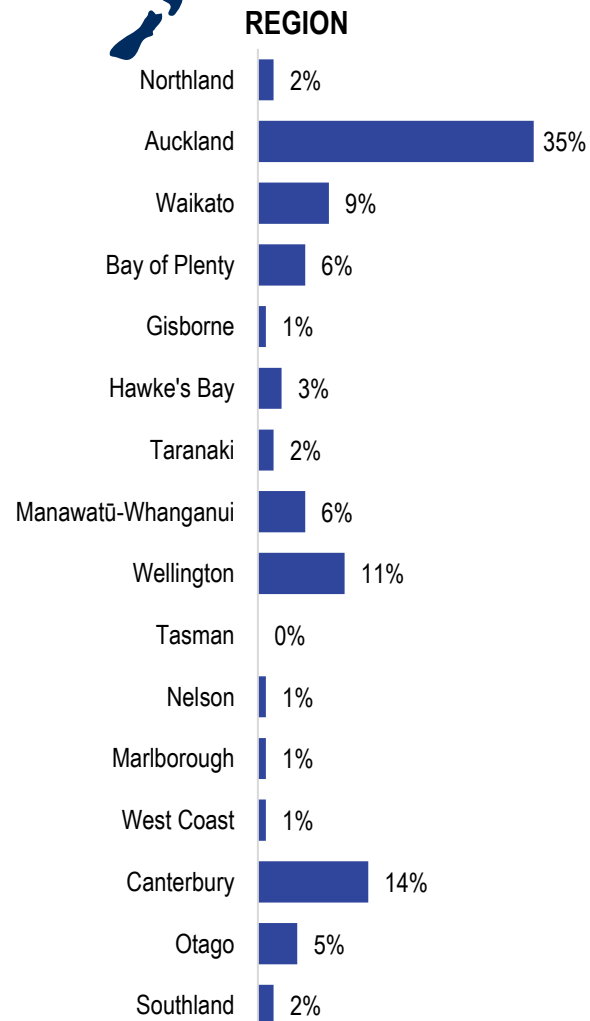
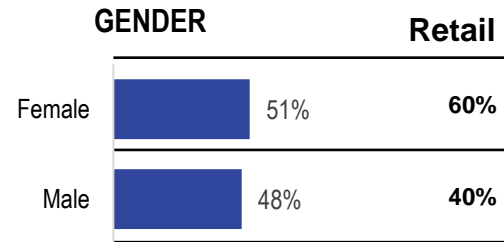
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## Retail NZ Survey

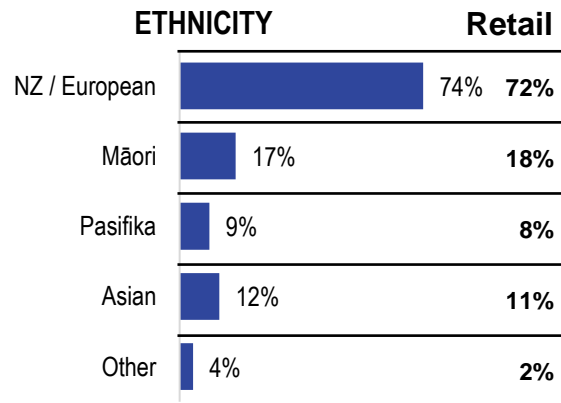


A parallel survey of 173 retail owners and managers was also conducted via Retail NZ networks. As the majority of retail workers in New Zealand are owners or managers we have included their data where appropriate in this report to provide insights into how NZ retail owners and managers (O&Ms) compare to the wider population.

# THE SAMPLE (Including retail staff surveyed within the total population)



General retail staff skew to younger age groups.



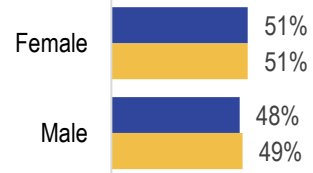
Retail staff are not over-represented by any single ethnic group.

Base: Total sample (n=2,002)

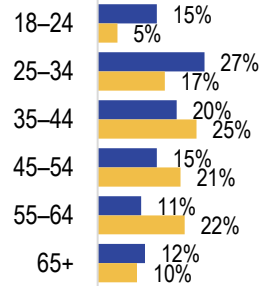
# GENERAL POPULATION VS RETAIL OWNER-OPERATORS



## GENDER



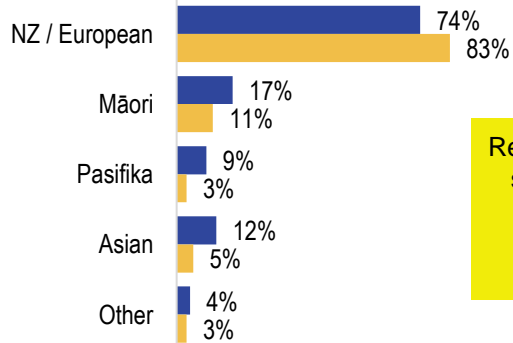
## AGE



Retail O&Ms understandably skew to older age groups.



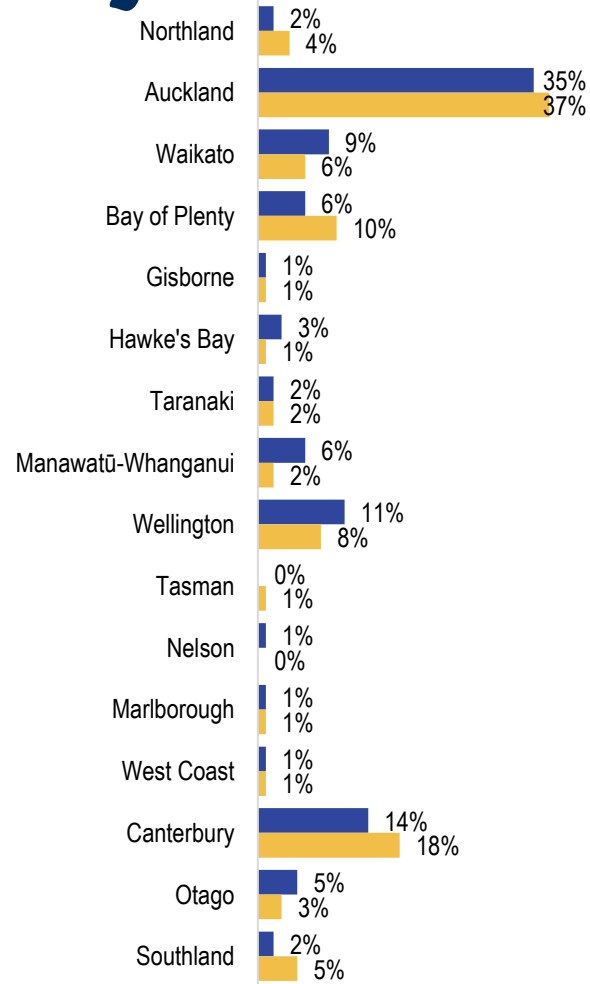
## ETHNICITY



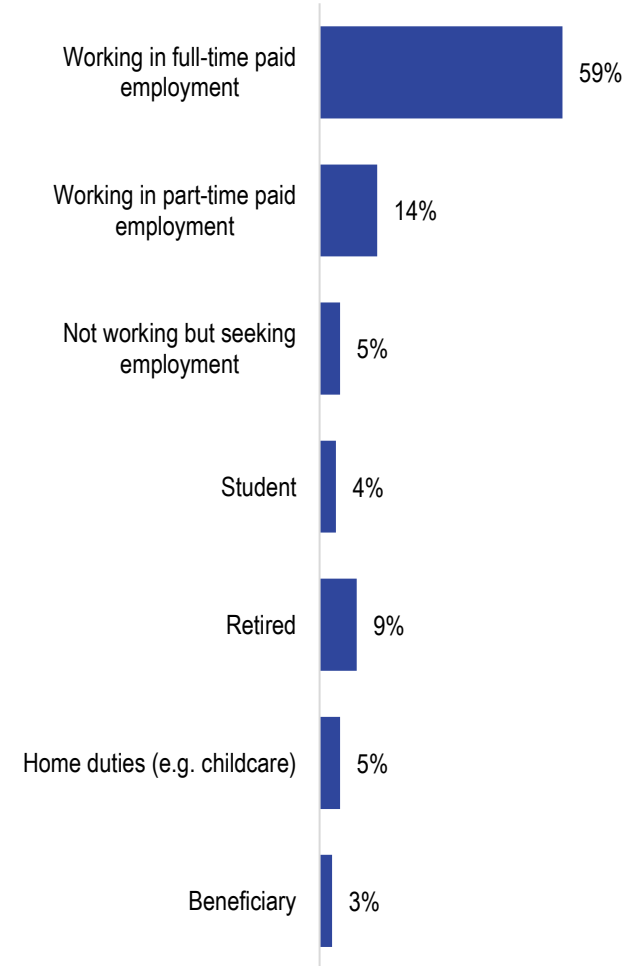
Retail O&Ms are slightly more likely to be European / Pakeha



## REGION



## EMPLOYMENT STATUS



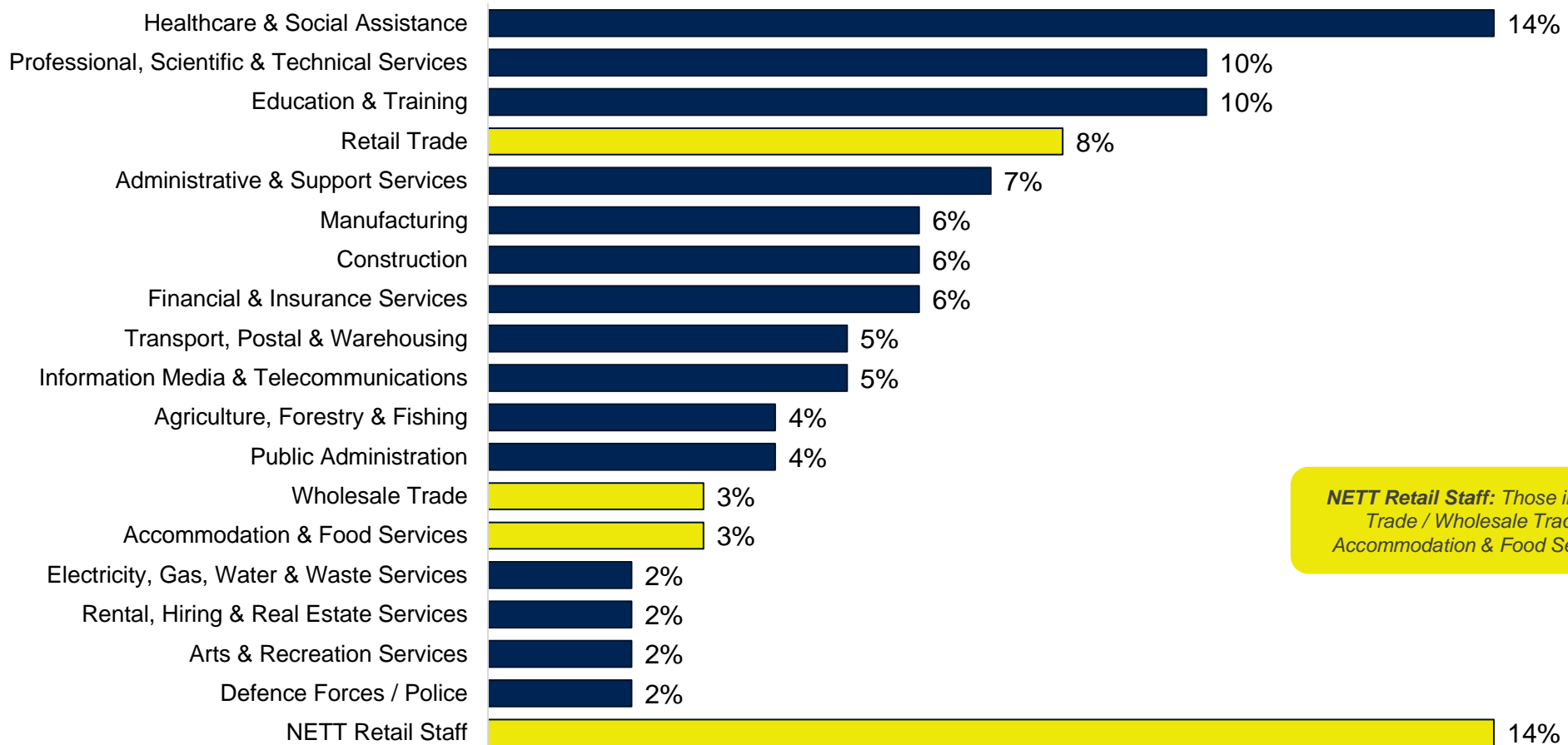
Total Sample

Retail Owners / Managers

Base: Total sample General Population (n=2,002), Total Sample Retail Owners / Managers (n=173)

# CURRENT INDUSTRY OF EMPLOYMENT

Combined, the 3 main retail sectors represented the largest employment category (equal with healthcare & social assistance).



**NETT Retail Staff:** Those in Retail Trade / Wholesale Trade / Accommodation & Food Services

**Base:** Those currently / to be employed (n=1,617)

**Q6:** In which industry do you currently work? If you have more than one job, please select your main job / In which industry/industries do you hope to work?

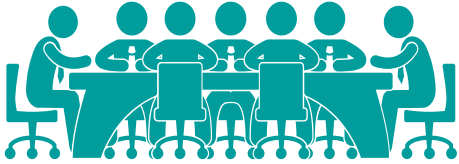


# PROFILING THE WORKFORCE

# 3

# KEY POINTS FROM THIS SECTION

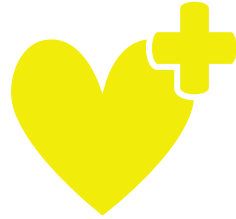
## Profiling the workforce



This survey confirms that the clear majority of people working in retail are NOT in shop-floor roles.



Those working in retail have been in the sector for a shorter time than most (but not all) other sectors.



Those in retail generally have the same skill levels, job satisfaction and openness to change / commitment to their current roles as everyone else.



Those with higher job satisfaction and expertise (both increase with tenure) are more open to changing jobs and sectors.

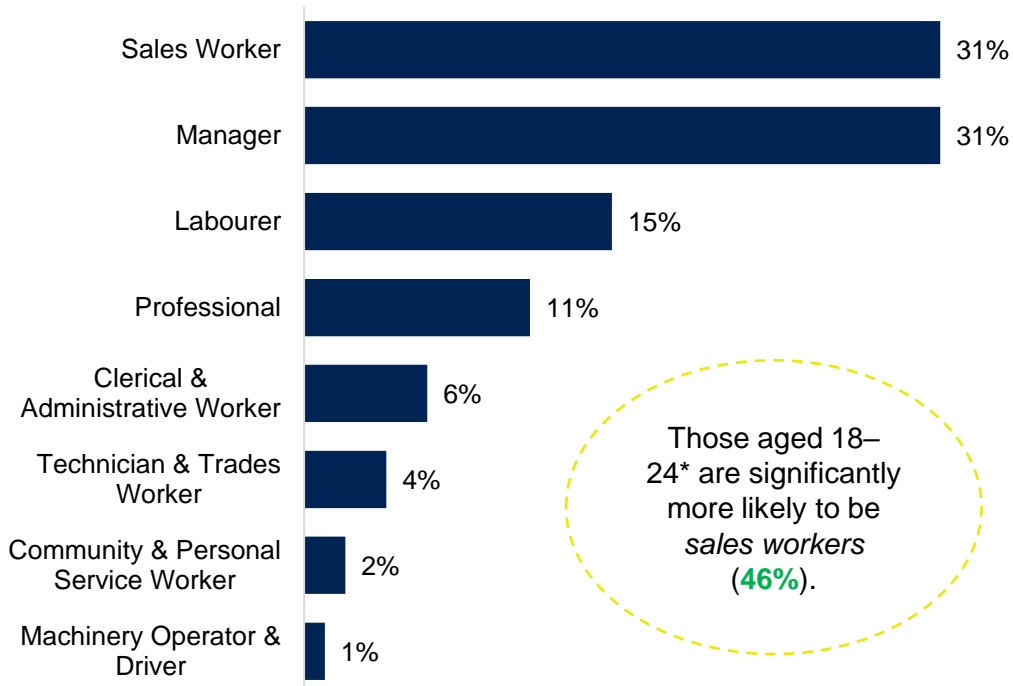


# CURRENT MAIN OCCUPATION

Amongst the retail staff surveyed, *sales staff* represented just a third, with *managers, labourers & specialist professionals* also represented in sizable numbers. However, as seen later in this report, the higher-profile shop-floor workers dominate people’s perceptions of the sector.

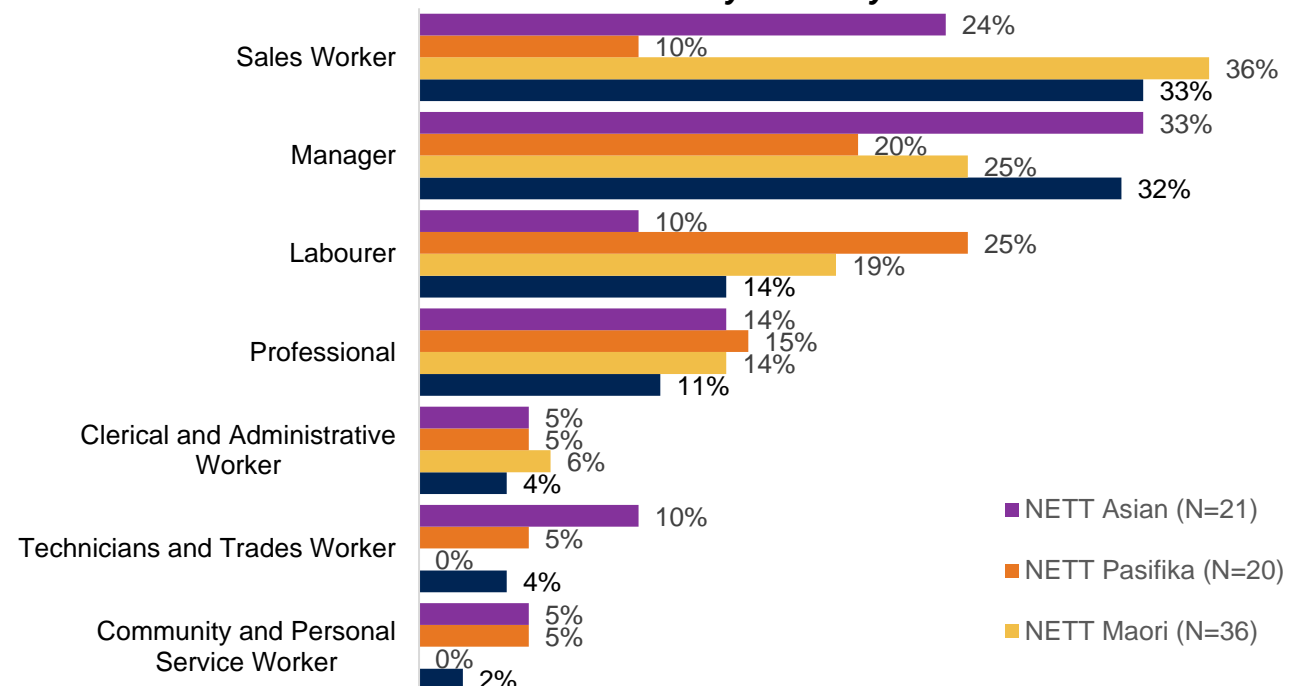
Although the base sizes are small, we can see some ethnic stereotypes are not supported within the retail sector. E.g. 35% of Pasifika retail workers are in managerial or professional roles.

Occupations of those in the Retail Sector



Those aged 18–24\* are significantly more likely to be *sales workers* (46%).

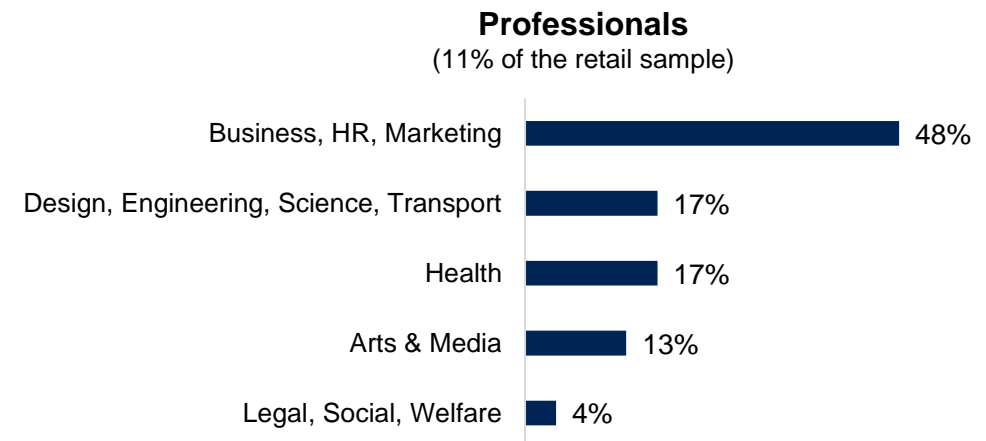
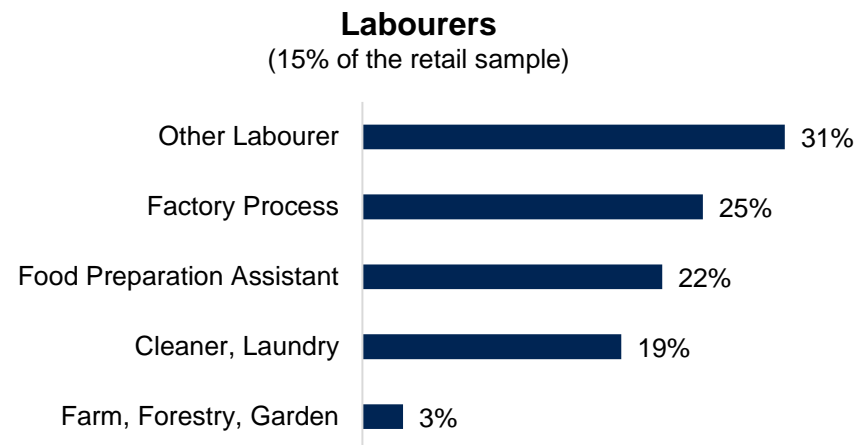
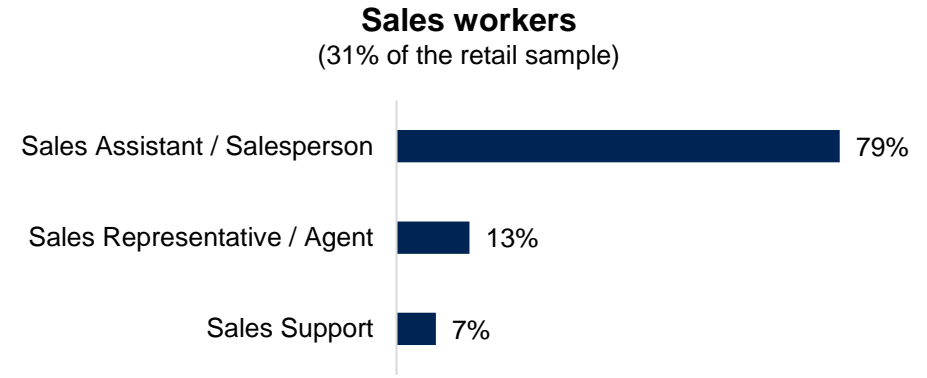
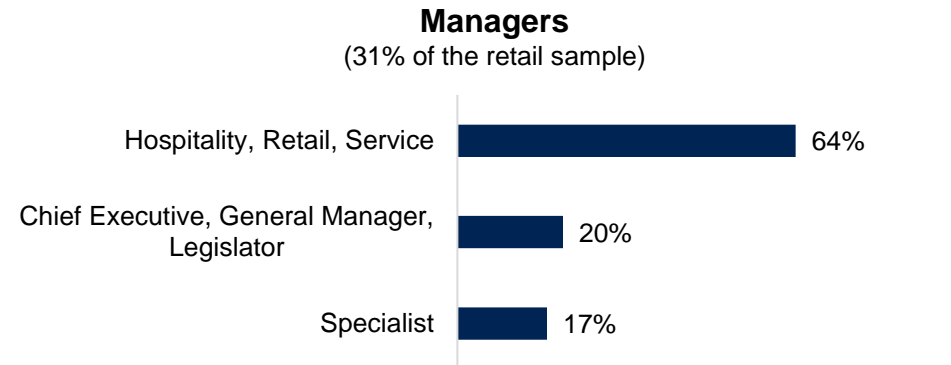
Occupations of those in the Retail Sector *By Ethnicity*



Base: Those currently working in retail (n=216). Q7a: Broadly speaking, which of the following categories best describes you main occupation?

# MAIN OCCUPATION AMONG RETAIL WORKERS (1)

The retail staff surveyed were employed in a wide range of jobs. *Shop assistants* represented 24% of all retail staff.



**Base:** Those currently working in retail (n=229)

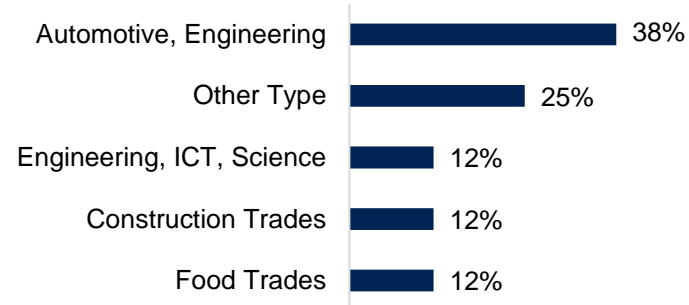
**Q7b:** Getting a little more detailed now, which of the following categories best describes your main occupation?

# MAIN OCCUPATION AMONG RETAIL WORKERS (2)

Amongst the retail staff surveyed, 4% were *skilled technicians & trade workers*.

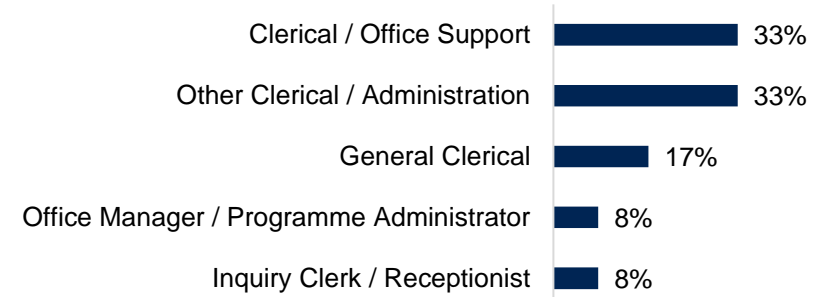
## Technician & trades workers

(4% of the retail sample)



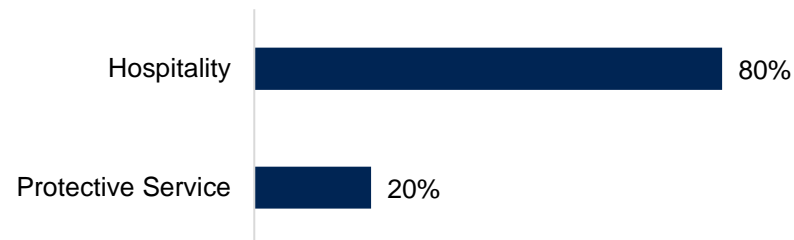
## Clerical & admin workers

(6% of the retail sample)



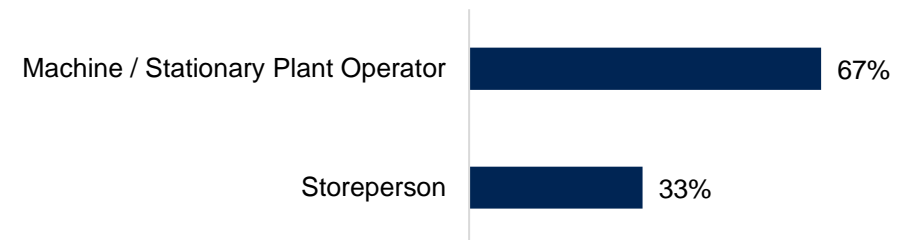
## Community & personal service workers

(2% of the retail sample)



## Machinery operators & drivers

(1% of the retail sample)

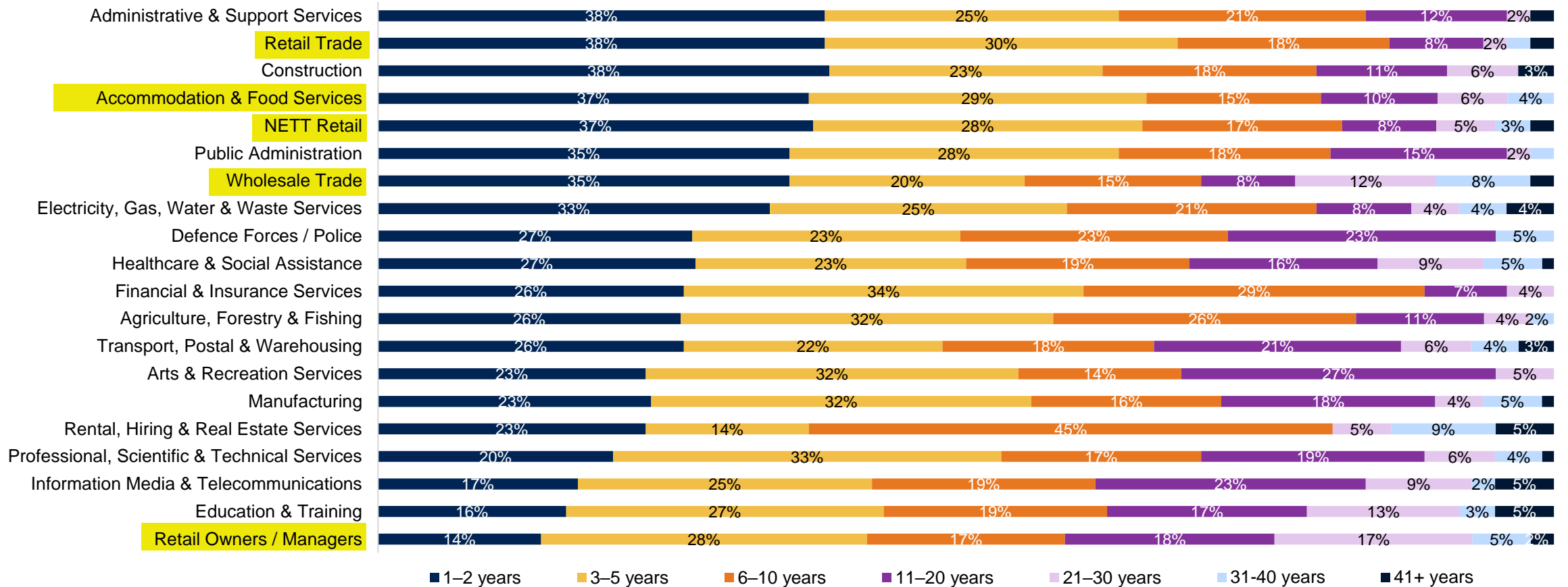


**Base:** Those currently working in retail (n=229)

**Q7b:** Getting a little more detailed now, which of the following categories best describes your main occupation?

# LENGTH OF TIME BY INDUSTRY

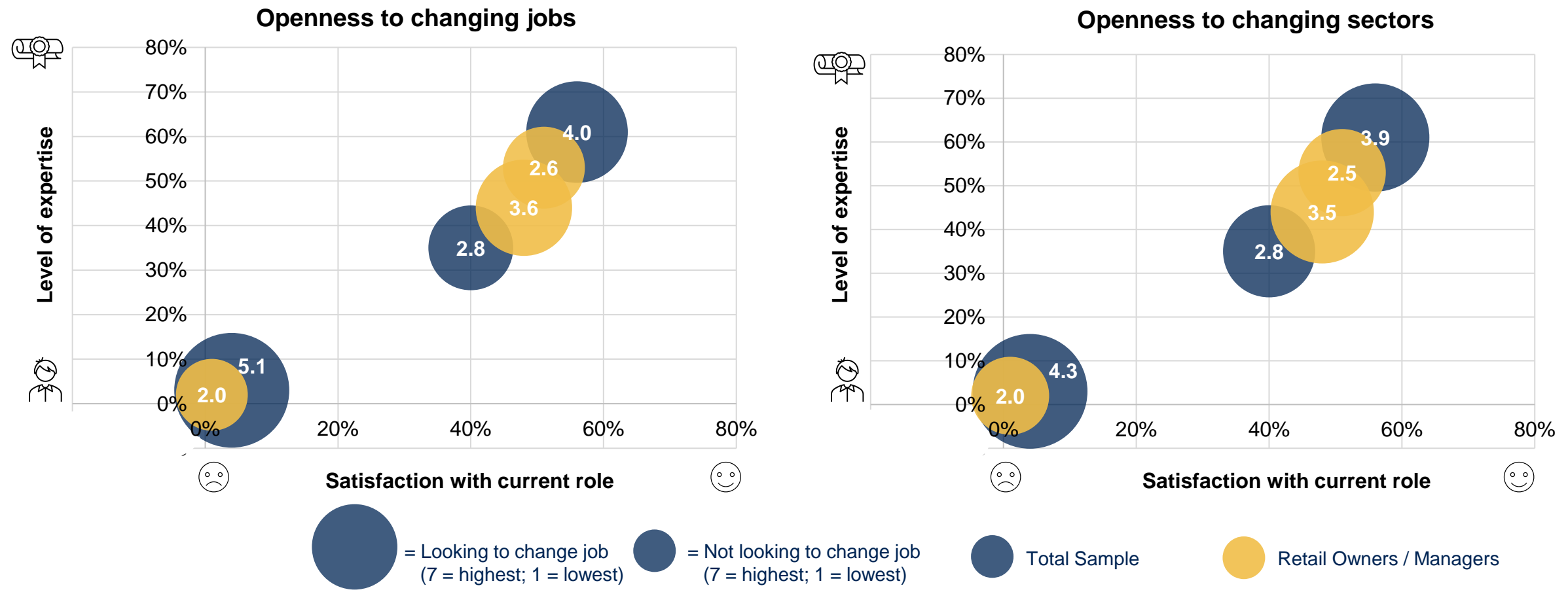
Commentary – retail owners have typically been there for longer periods of time than gen pop retail trade, although not significantly





# EXPERTISE, SATISFACTION & INTEREST IN JOB CHANGE

In general, Retail O-Os are less likely to consider alternative jobs or sectors than those currently employed in other sectors. Those in retail appear happier in their chosen careers.



**Base:** Those currently working (n=1,437), Retail Owners / Manager (n=173)  
**Q9a:** What do you believe your level of expertise is, in your current role as a <ANSWER FROM Q7B>? / **Q9b:** How satisfied are you in your current role as a <ANSWER FROM Q7B>? / **Q9c:** How open are you to changing your job, to something different than your current job as a <ANSWER FROM Q7B>? / **Q9d:** How open are you to changing from the industry sector in which you currently work to a different sector?



# PERCEPTIONS OF THE RETAIL SECTOR

# 4

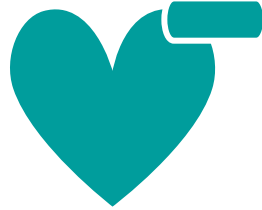


# KEY POINTS FROM THIS SECTION

## Perceptions of the retail sector



Perceptions of the retail sector are dominated by the shop-floor, understandably as this is the most public-facing part of the sector.



People are twice as likely to cite negative, rather than positive, things about the retail sector.



Those in retail generally have better opinions of retail, noting the need to be friendly and helpful, and to have a good customer service ethic.



There is a strong perception that the sector underpays staff, especially when long hours and difficult customers are factored in. This issue is also a problem for those in retail.



# UNPROMPTED PERCEPTIONS OF THE RETAIL SECTOR

## RETAIL OWNERS / MANAGERS

*The retail sector is tough ... I enjoy meeting lots of people and helping them find things they love, but **it's a temporary job for me**, it would never be a forever thing."*

*It is front facing and interacting with a wide range of customers each day, so it can be hard to remain professional and helpful if the customer is rude. I **find little reward from retail work as it is usually not helping a bigger cause.**"*

*Has **threats from online businesses** that have lower overheads, sales are heavily impacted by the economy and peoples disposable income.."*

*Entry level job. **Rostered shift work. Limited career progression.** Parts of sector provide essential goods to society."*

*Retail seems **very hands-on and on the feet always** as you need to be communicative and on the floor to tend to customers needs."*

***Under appreciated workforce** who often bear the brunt of customer dissatisfaction."*

*Challenging environment that **needs to continually evolve to remain relevant and competitive with cheaper online options.** Focus on the shopping experience - look to overseas experiences and trends."*

*Challenging environment with changing consumer behaviours i.e. increase in online shopping. **Customer service is critical to success and great product offering/s.**"*

*the **range of people you have to deal with on a daily basis**, constant difficulty of a changing environment*

# PERCEPTIONS OF THE RETAIL SECTOR (total sample)

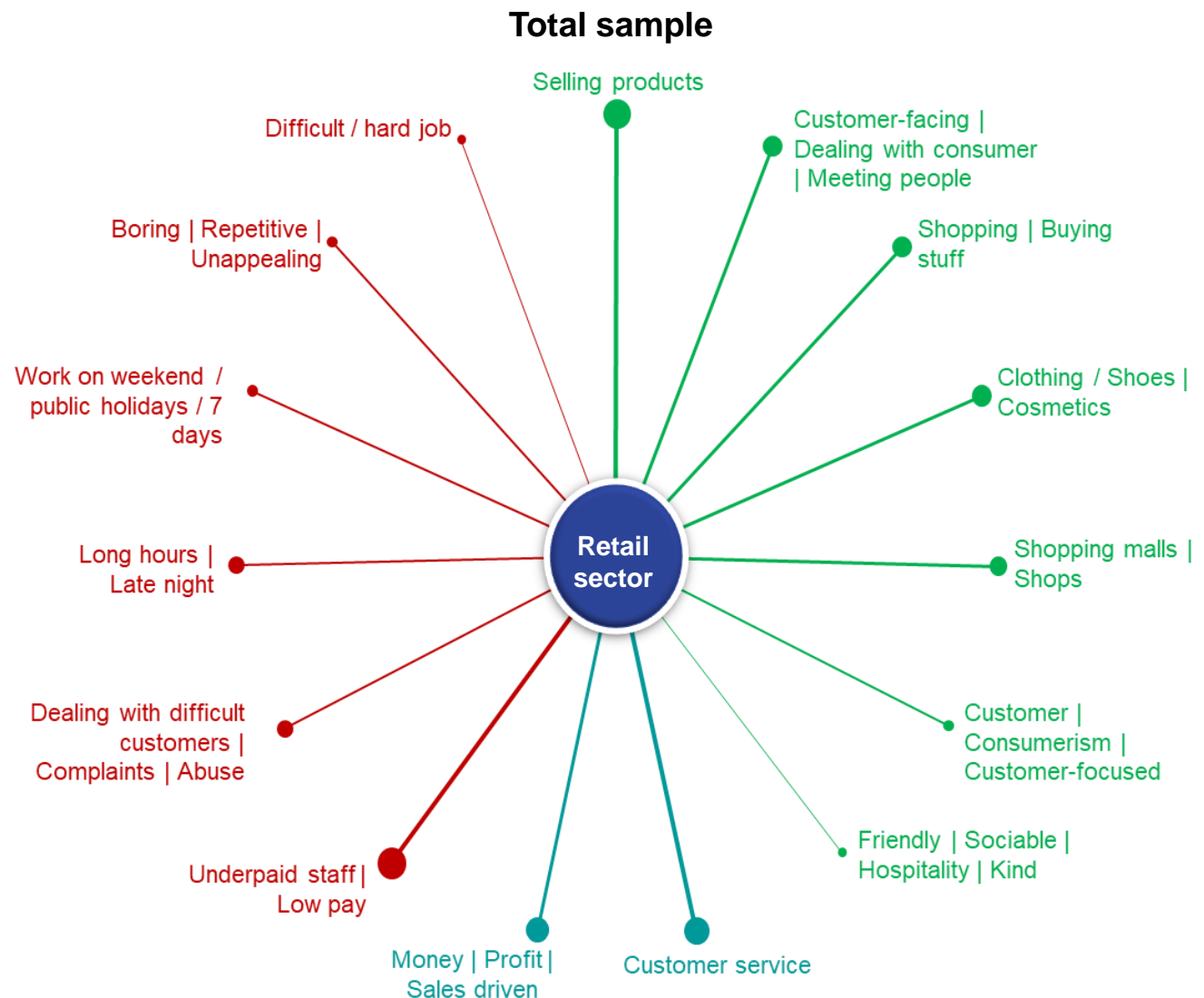
## Mental network analysis

### Retail – shops with underpaid staff

At an overall level, unprompted perceptions of the retail sector are roughly equally divided between somewhat functional, descriptive thoughts and less appealing negative thoughts.

It is clear that perceptions of the retail sector are dominated by the shop-floor (selling products and customer-facing), understandably as this is the most public-facing part of the sector.

Unfortunately, there is also a strong perception that the sector underpays staff, especially when long hours and difficult customers are factored in.



# PERCEPTIONS OF THE RETAIL SECTOR (non-retail vs retail)

In terms of impressions of retail / non-retail workers, those in retail are less likely to have negative things to say about the sector, concentrating instead on the need to provide *good customer service* within a *sales-driven environment*. Being *friendly & helpful* & having a *good customer service* ethic is also evident. While the main negative factor cited by those in retail also concerned *low pay*, this was much less prevalent than for those not in retail.

## Those not in retail



## Those in retail



# UNPROMPTED PERCEPTIONS OF THE RETAIL SECTOR

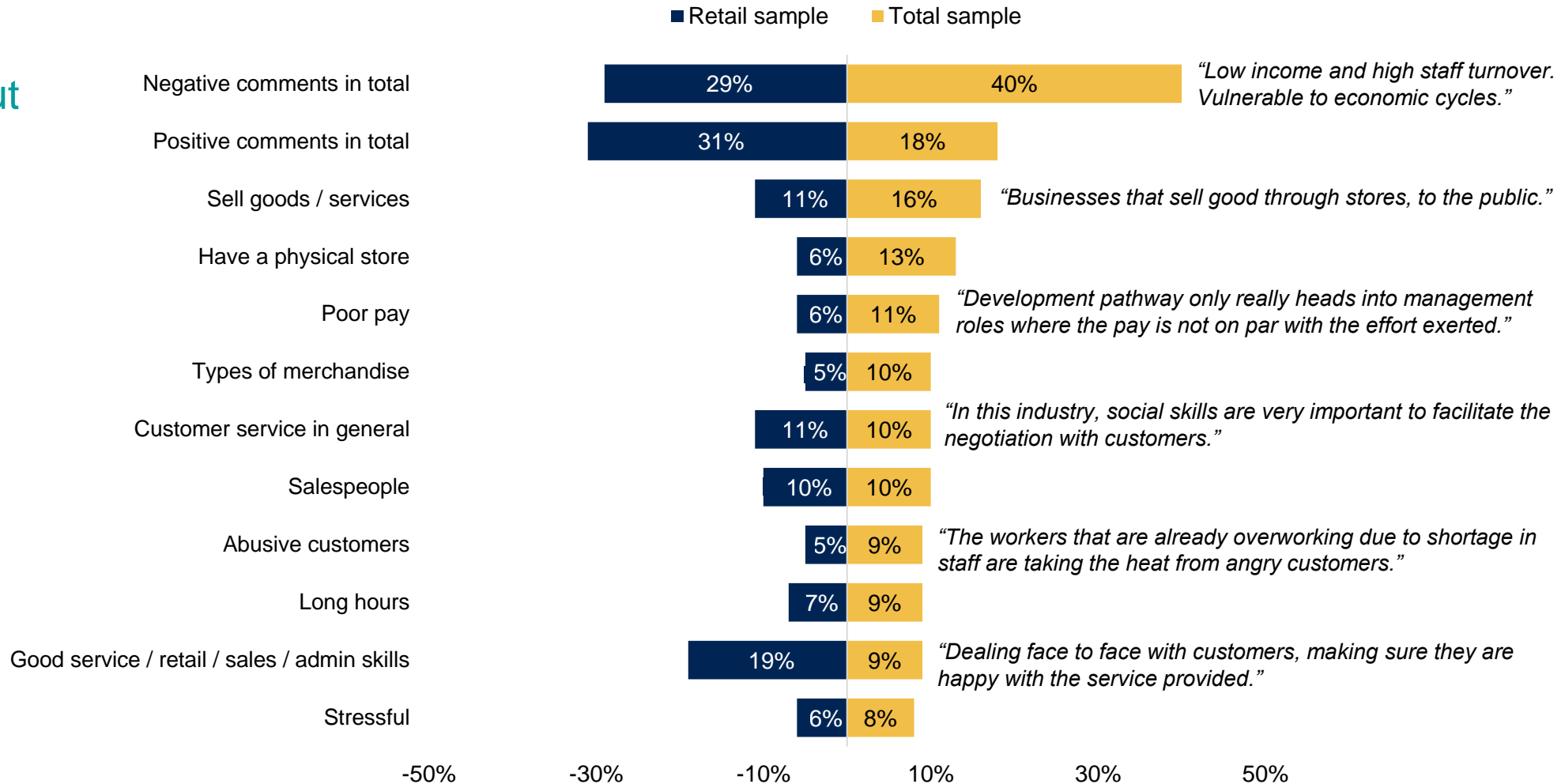
Coded responses from the general population

## Retail – important, but tough & underpaid

Amongst the total sample, people were twice as likely to cite negative (e.g. poor pay), rather than positive, things about the retail sector.

Those in retail were more positive, especially noting how the sector requires good service, admin and sales skills.

However, the proportion of negative comments from those in retail almost equalled the positive ones.



Base: Total sample (n=2,002), those currently working in retail (n=229)

Q12: What comes to mind when you think about the **retail sector**? Please type in all the main ideas and things you think about in regard to retail businesses.

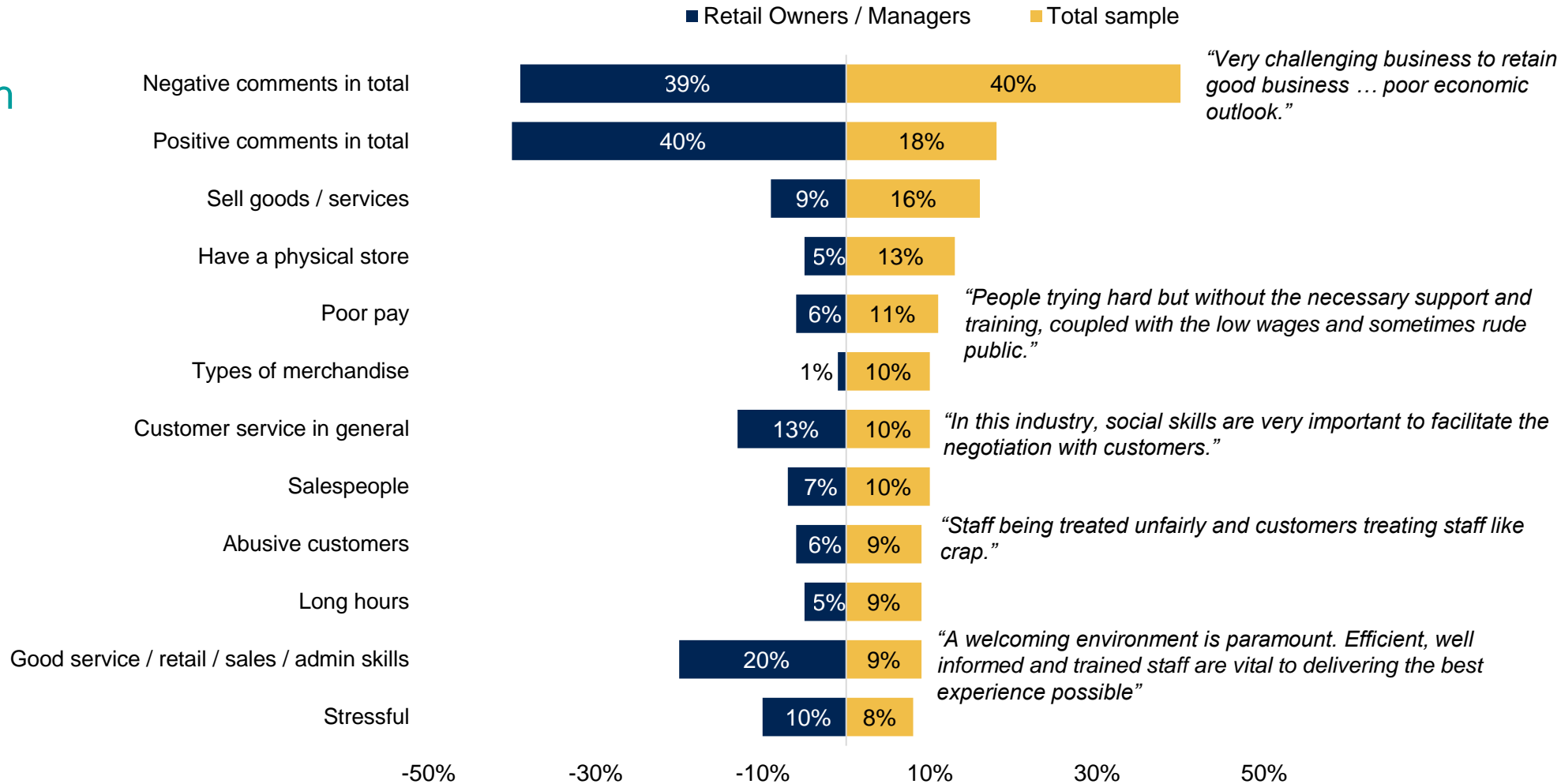
# UNPROMPTED PERCEPTIONS OF THE RETAIL SECTOR

Coded responses from Retail O&Ms vs the general population

Retail O-Os are much more positive about the sector

Although Retail O-Os are just as likely to cite negative things about the sector as the general population, they are twice as likely to think of positive things.

Good service and skills in general are more likely to be cited by Retail O-Os



Base: Total sample (n=2,002), Retail Owners / Managers (n=173)

Q12: What comes to mind when you think about the retail sector? Please type in all the main ideas and things you think about in regard to retail businesses.

# KNOWLEDGE OF THE RETAIL SECTOR

# 5





# KNOWLEDGE OF THE RETAIL SECTOR

## A note on this section

The key use of this research is to help facilitate a change in New Zealanders' perceptions of careers in the retail sector.

To facilitate content that suits 'sound bites' and can gain press coverage, a section of the questionnaire comprised a set of questions on a range of issues concerning retail careers in New Zealand.

The results follow, with the summary page highlighting the questions where New Zealanders underestimate the retail sector the most. It is these that we hope will be used to attract attention to the misperceptions people have about the retail sector.

*\*Retail O&Ms were not asked this section.*



# THE MAIN MISPERCEPTIONS OF RETAIL

People generally underestimate the size, demand, qualifications & skill levels of retail staff.



73% underestimate the proportion of retail staff who keep getting extra upskilling and training opportunities, which is 45%.



62% incorrectly think that the retail sector is mainly female, when in fact the gender split is largely equal.



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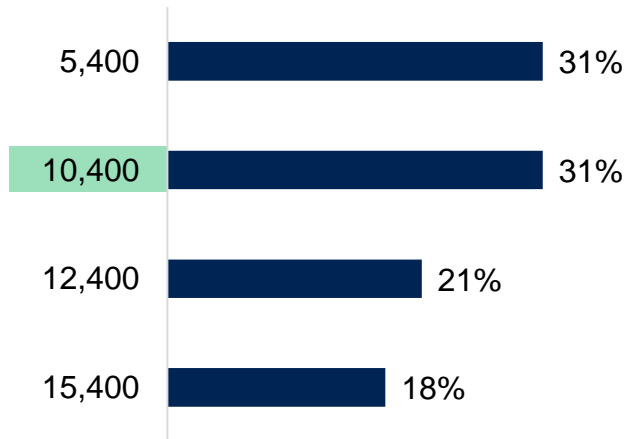
# PERCEPTIONS OF RETAIL – Identifying misperceptions (1)

31% underestimate how many new retail jobs will be created between now and 2024.

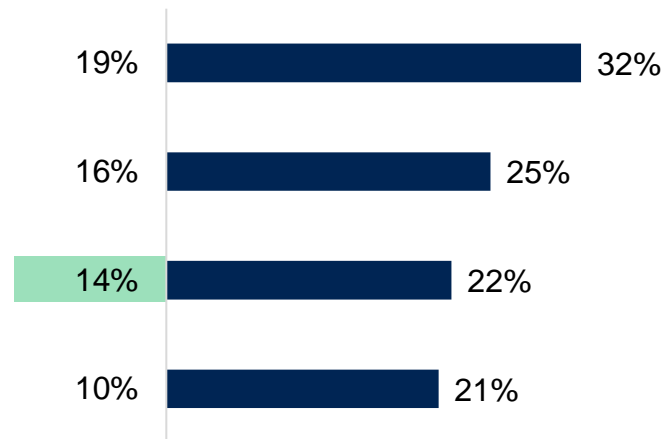
People tend to overestimate retail's input into GDP, possibly reflecting the high profile of the sector.

With a third accurately estimating how many jobs will be in retail in 2025, the remainder were split evenly – hence, 31% underestimated the size of the sector.

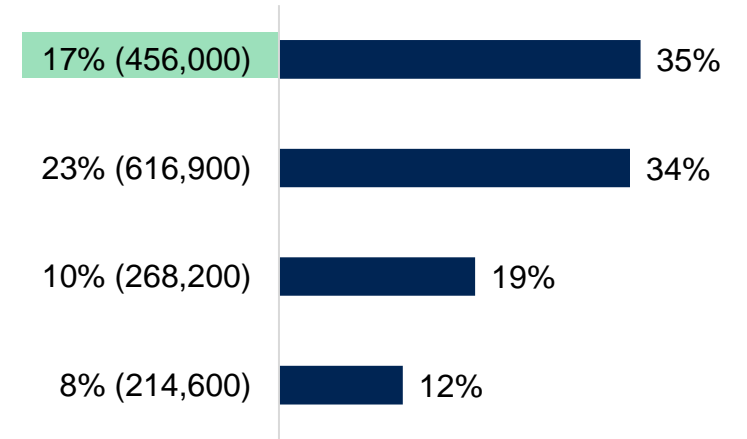
***New retail jobs expected to be created between now & 2024***



***% of NZ GDP produced by the retail sector***



***NZ retail sector jobs by 2025***



**Base:** Total sample (n=2,002)

**Q16a:** How many new retail jobs are expected to be created between now and 2024? / **Q16b:** How much of New Zealand's Gross Domestic product is produced by the retail sector? / **Q16c:** By 2025, how many jobs in New Zealand will be in the retail sector?

# PERCEPTIONS OF RETAIL – Identifying misperceptions (2)

75% underestimate how many retail staff have tertiary qualifications.

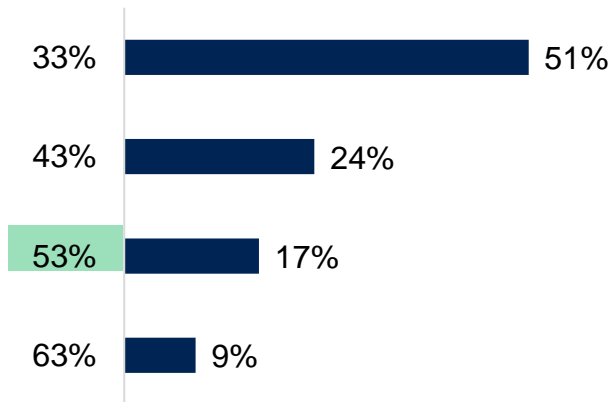
62% incorrectly think that the retail sector is mainly female.

Despite widespread impressions of low pay, NZers tend to overestimate how many wealthy people came from retail (47% saying 16 or more).

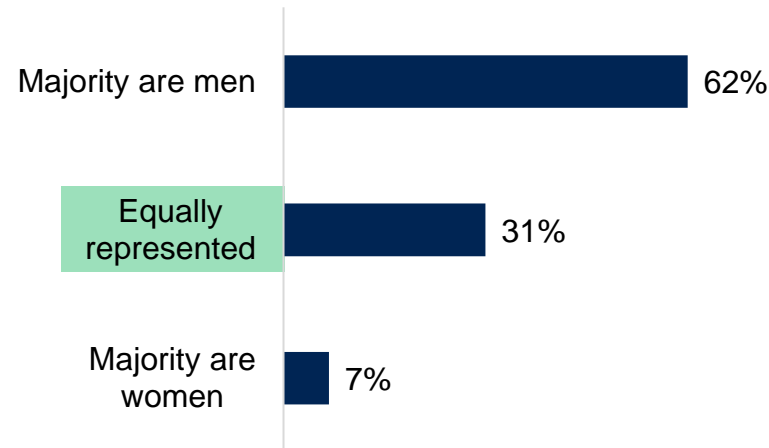
Those in the retail sector are significantly more likely to correctly say that men and women are equally represented (39%).

Conversely, those in retail underestimate, with 37% saying only 7 millionaires came from retail.

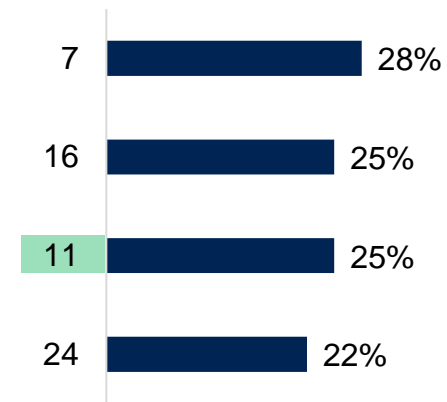
**% of retail workers with tertiary (post-school) qualifications**



**Retail sector dominated by male or female staff**



**NZ's 100 richest millionaires built their wealth in retail**



Base: Total sample (n=2,002), those currently working in retail (n=229)

Q16d: What proportion of retail workers have tertiary (post-school) qualifications? / Q16e: Is the retail sector dominated by male or female staff? / Q16f: How many of New Zealand's 100 richest millionaires built their wealth in retail?

# PERCEPTIONS OF RETAIL – Identifying misperceptions (3)

89% don't think that retail staff enjoyed the largest % pay increases in the last year.

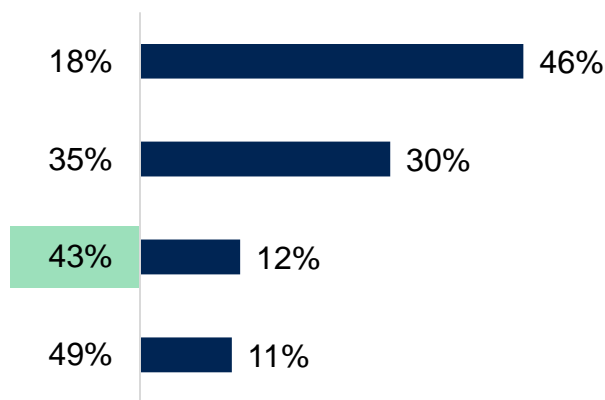
Even those in retail sector did not know this, their being significantly more likely to say that Tradies had the highest pay increases (34%).

**Largest % pay increase in the year to June 2022**



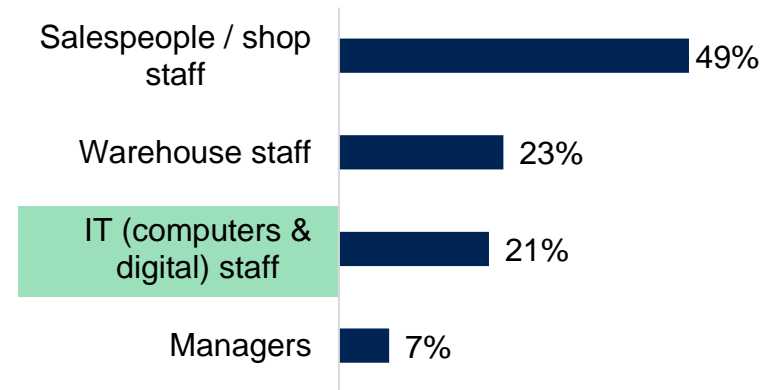
76% underestimate the skill level required in the average retail role; those in retail did not differ in this belief.

**% of retail staff with 'medium to highly skilled roles'**



Half of NZers don't know that the worst retail staff shortages are in digital / IT roles.

**Types of jobs in NZ retail with the worst shortages**



**Base:** Total sample (n=2,002), those currently working in retail (n=229)

**Q16g:** Who had the largest % pay increases in the year to June 2022? / **Q16h:** What proportion of retail staff have jobs that are judged to require 'medium to highly skilled roles'? / **Q16i:** What types of jobs in retail are experiencing the worst shortages in New Zealand?

# PERCEPTIONS OF RETAIL – Identifying misperceptions (4)

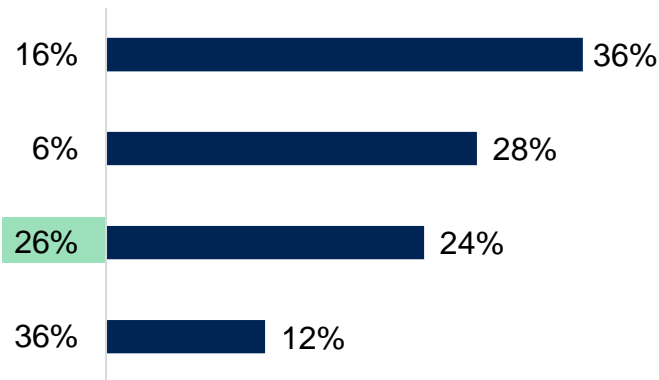
64% underestimate the proportion of managers and professionals working in the retail sector.

73% underestimate the proportion of retail staff who keep getting extra upskilling and training opportunities.

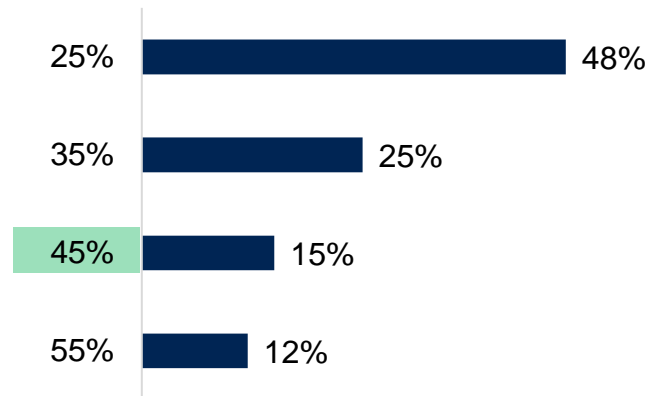
73% underestimate how flexible retail work hours can be.

Those in retail have a more accurate idea, being significantly more likely to select the correct 45% answer (22%).

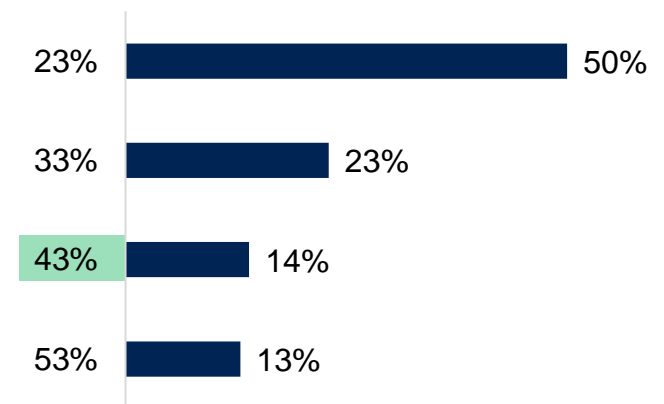
**% of managers & professionals in retail jobs**



**& of retail staff offered upskilling opportunities**



**% of retail staff with flexible working hours**



**Base:** Total sample (n=2,002), those currently working in retail (n=229)

**Q16j:** What proportion of people in retail jobs are managers and professionals? / **Q16k:** What proportion of retail staff are offered upskilling opportunities? / **Q16l:** What proportion of retail staff have flexible working hours?

# PERCEPTIONS OF RETAIL CAREERS

# 6



# KEY POINTS FROM THIS SECTION

## Perceptions of retail careers



Perceptions of careers in the retail sector are dominated by perceptions that retail primarily involves in-store shop-floor work.

Retail O&Ms know differently!



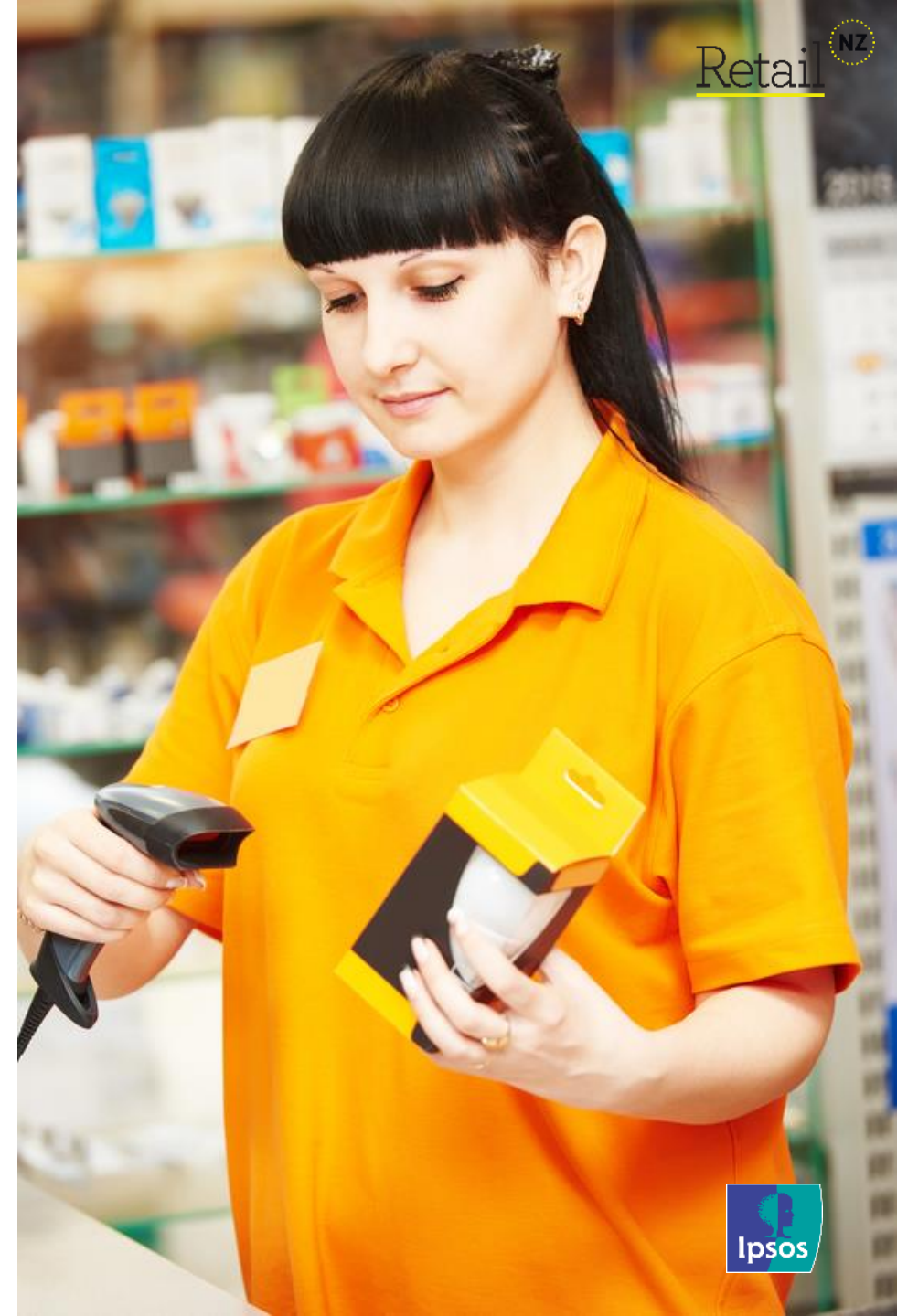
Retail employees are more positive, especially in relation to the variety, service skills and opportunity in the sector.



Although the special skills that frontline retail staff require are appreciated, they are undermined by perceptions of low pay and limited long-term opportunities.



Despite being more positive about their jobs, those in retail are almost as likely as others to cite low pay and limited career opportunities.





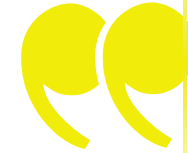
# UNPROMPTED PERCEPTIONS OF RETAIL CAREERS



***Difficult**, dealing with a large variety of people, working on commission. Retail workers are trained to be pushy and annoying.”*



*Very hard to actually keep a career in the retail sector due to the **uncertain nature of the industry** due to the high cost of living and happenings.”*



## RETAIL OWNERS / MANAGERS

*“Working in retail can be challenging. But it definitely **gives the opportunity to grow different skill sets** that can become handy in higher skilled jobs”*



*It definitely gives the **opportunity to grow different skill sets** that can become handy in higher skilled jobs... communication, organisation, working in teams, conflict resolution.”*



*Having to be **available on weekends**. Well dressed. **Not great pay** unless in management.”*



*“There are definite career paths but accessing these **relies on the individual recognising the opportunities** and proactively developing their skills.”*



***Customer service** comes to mind when I think about jobs in the retail sector because without great customer service there is no retail.”*



*People friendly, happy nature, **being able to put up with grumpy people**, management that have no idea what it is like on the floor.”*



*“The complexity and ever changing nature of retail is now home to not only amazing customer facing people, but also **highly educated and talented individuals**.”*

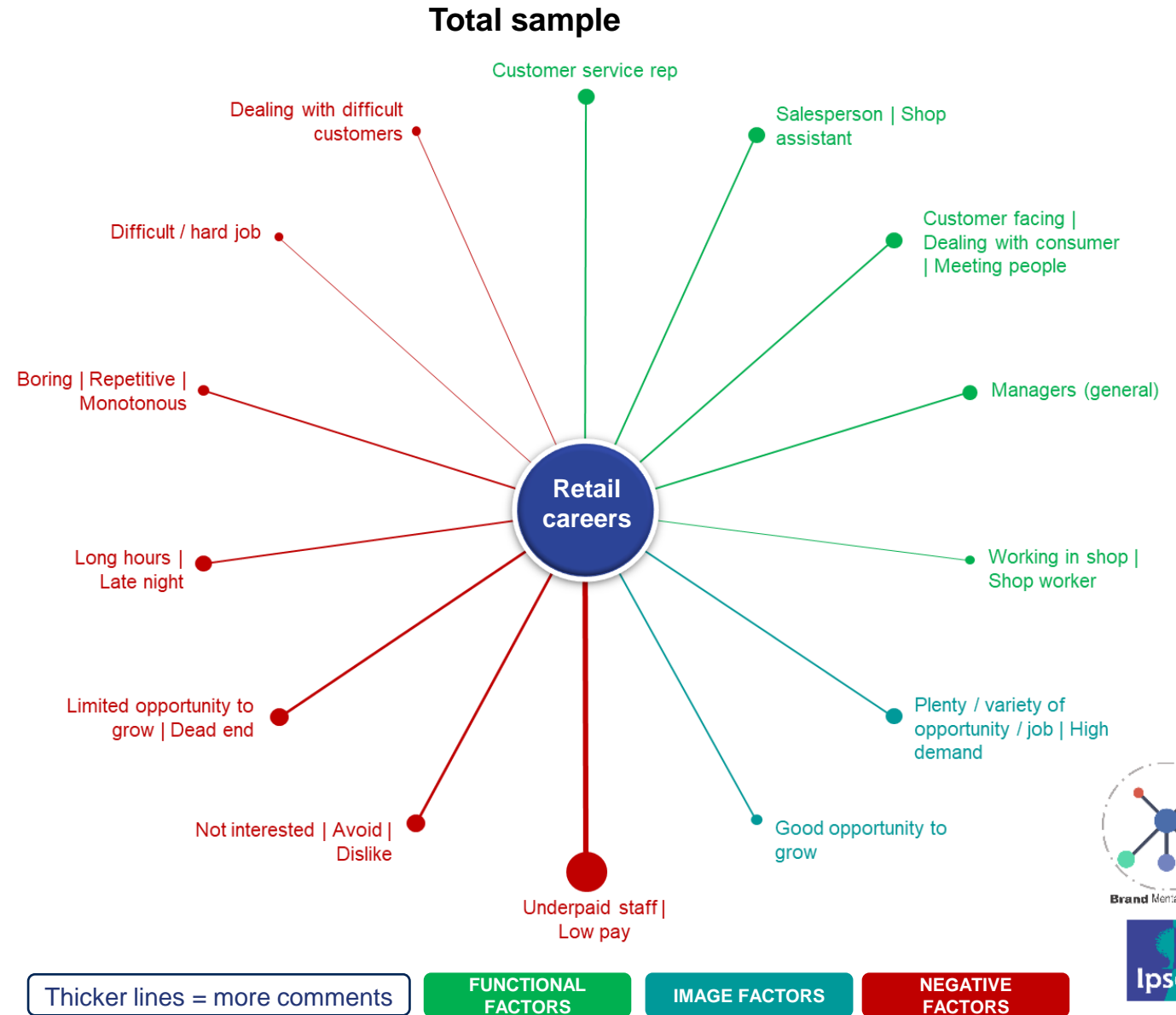
# PERCEPTIONS OF RETAIL CAREERS (total sample)

## Mental network analysis

### Retail careers – Underpaid with limited opportunities

At an overall level, unprompted perceptions of careers in the retail sector are dominated by the idea that retail primarily involves in-store shop-floor work.

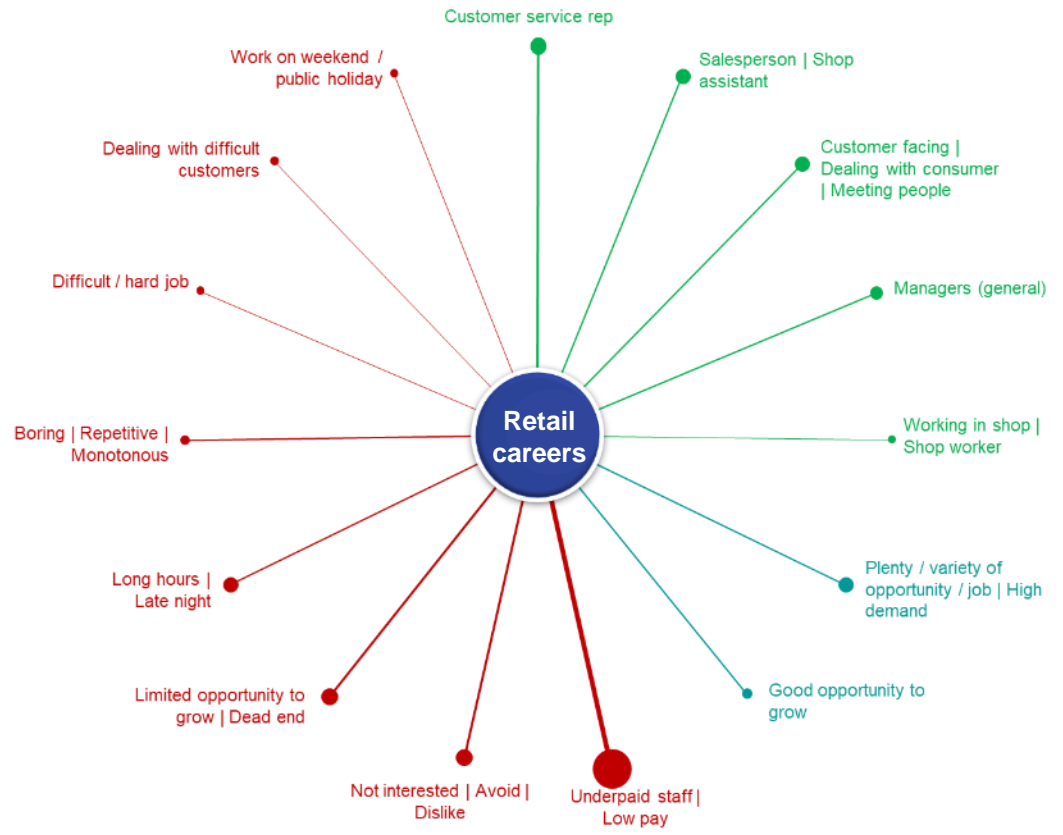
While these impressions are generally seen in a positive light, especially the jobs being in high demand, this is undermined by a clear perception that retail jobs are underpaid and offer limited long-term opportunities.



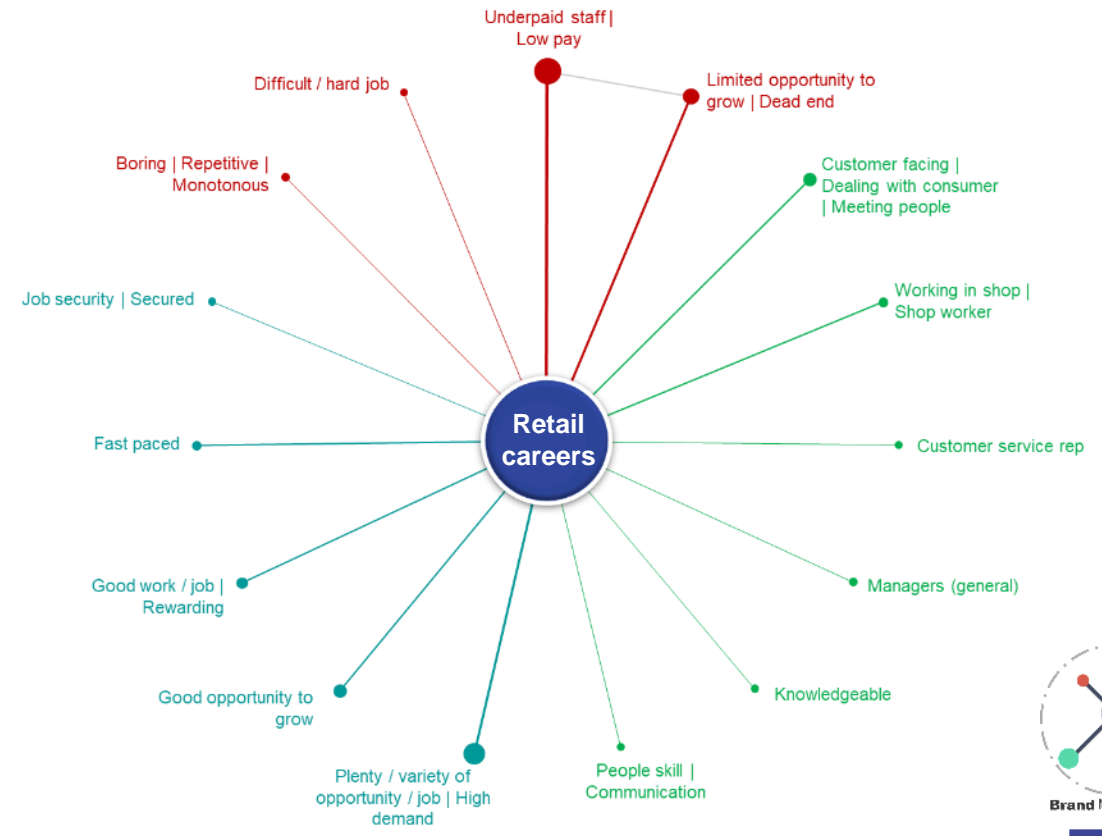
# PERCEPTIONS OF RETAIL CAREERS (non-retail vs retail)

In terms of impressions of non-retail / retail workers, despite retail employees' being more likely to cite the *variety & opportunity* in the sector, they are almost as likely to cite *low pay & limited career opportunities*. This raises the issue of the shorter-than-average tenure of retail workers & how the retail staff shortage could be improved through better staff retention & acquisition.

Those not in retail



Those in retail



Thicker lines = more comments

FUNCTIONAL FACTORS

IMAGE FACTORS

NEGATIVE FACTORS



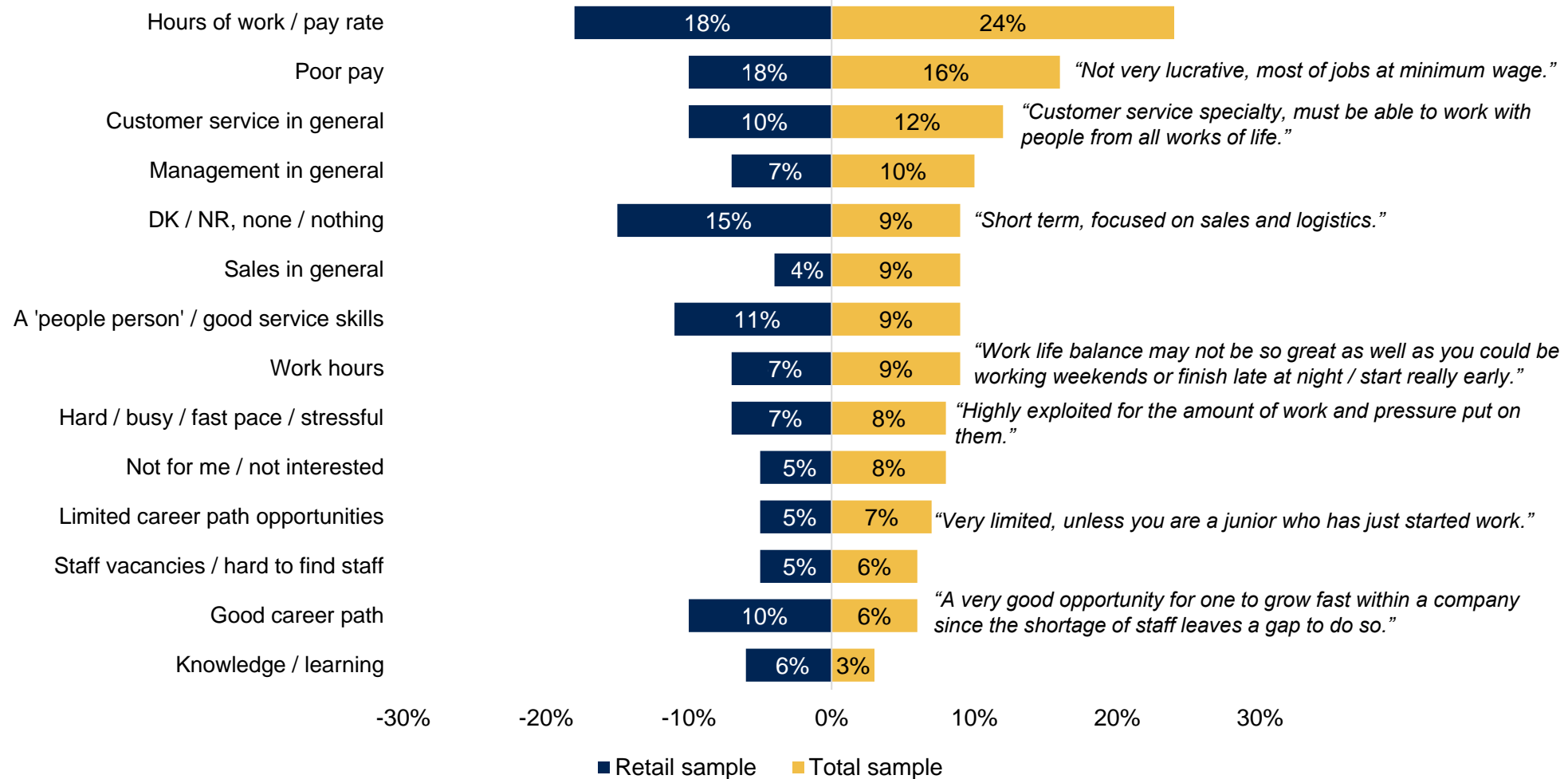
# UNPROMPTED PERCEPTIONS OF RETAIL CAREERS

## Coded responses

### Retail – providing customer service with low pay

Perceptions of retail careers are dominated by impressions of low pay compounded by poor hours of work.

Those in retail are almost as likely to have these sentiments too, although were generally a little more positive about other aspects of retail careers, such as the career paths available and the need to have good service skills.



Base: Total sample (n=2,002), those currently working in retail (n=229)

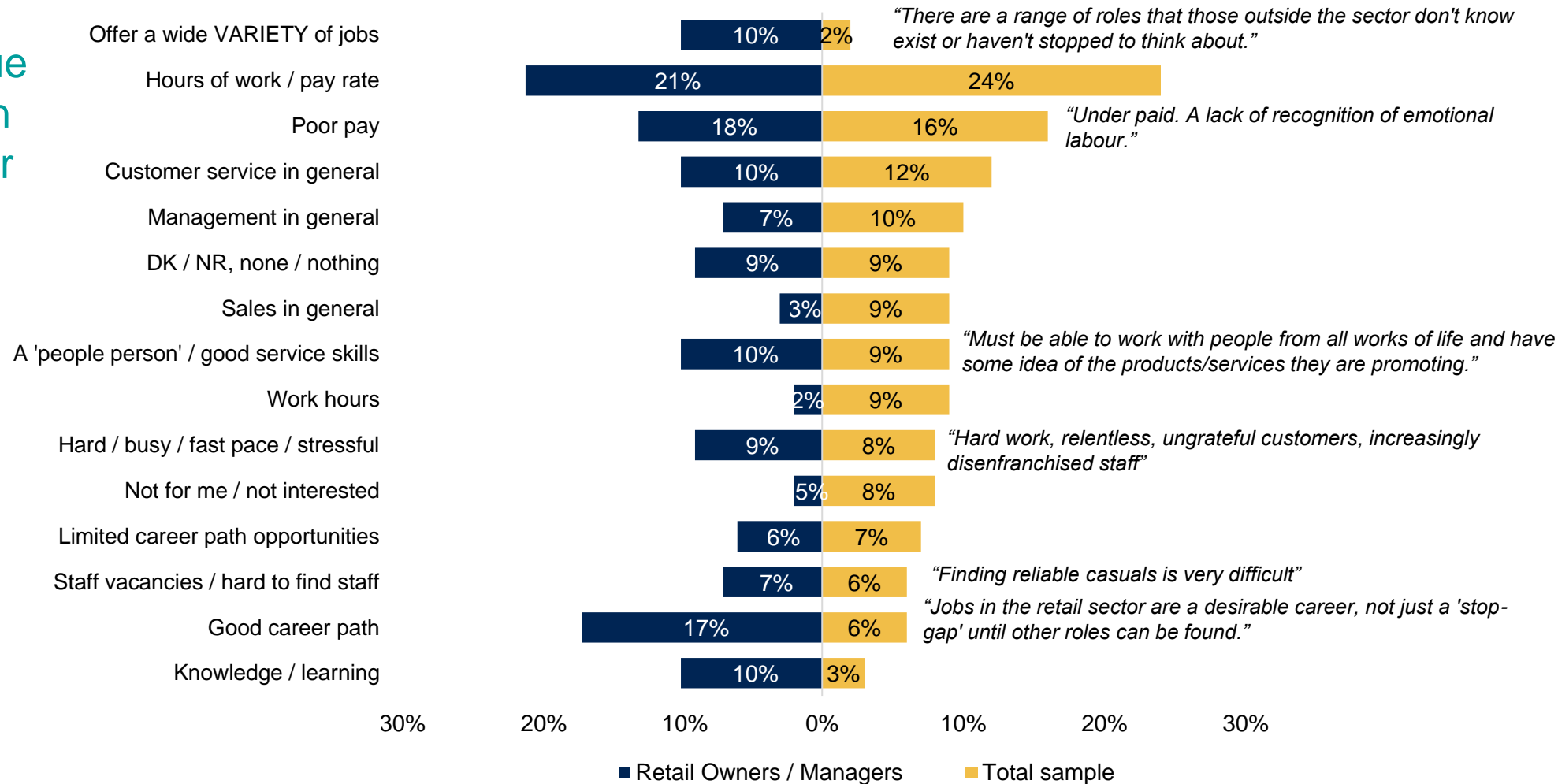
Q13: What comes to mind when you think about jobs and careers in the retail sector? Please type in all the ideas and things you think about jobs and careers in retail.

# UNPROMPTED PERCEPTIONS OF RETAIL CAREERS

## Coded responses

Pay remains an issue but Retail O&Ms can see long-term career benefits.

Although both the general population and Retail O&Ms agreed that retail careers can have challenging work hours and pay rates, Retail O&Ms also noted the wide variety of jobs and good career paths that retail can offer.



Base: Total sample (n=2,002), those currently working in retail (n=229)

Q13: What comes to mind when you think about jobs and careers in the retail sector? Please type in all the ideas and things you think about jobs and careers in retail.



7

# ATTRACTING PEOPLE TO RETAIL CAREERS

# ATTRACTING PEOPLE TO RETAIL CAREERS



Overall, people want jobs that enable them to focus on doing things right, in a caring, collaborative team that fosters creativity and new opportunities.



The retail sector is not a very attractive career option for most people, being seen to offer diverse colleagues but low pay, high hours and dull jobs.



People seek good pay, interesting work and a work–life balance.



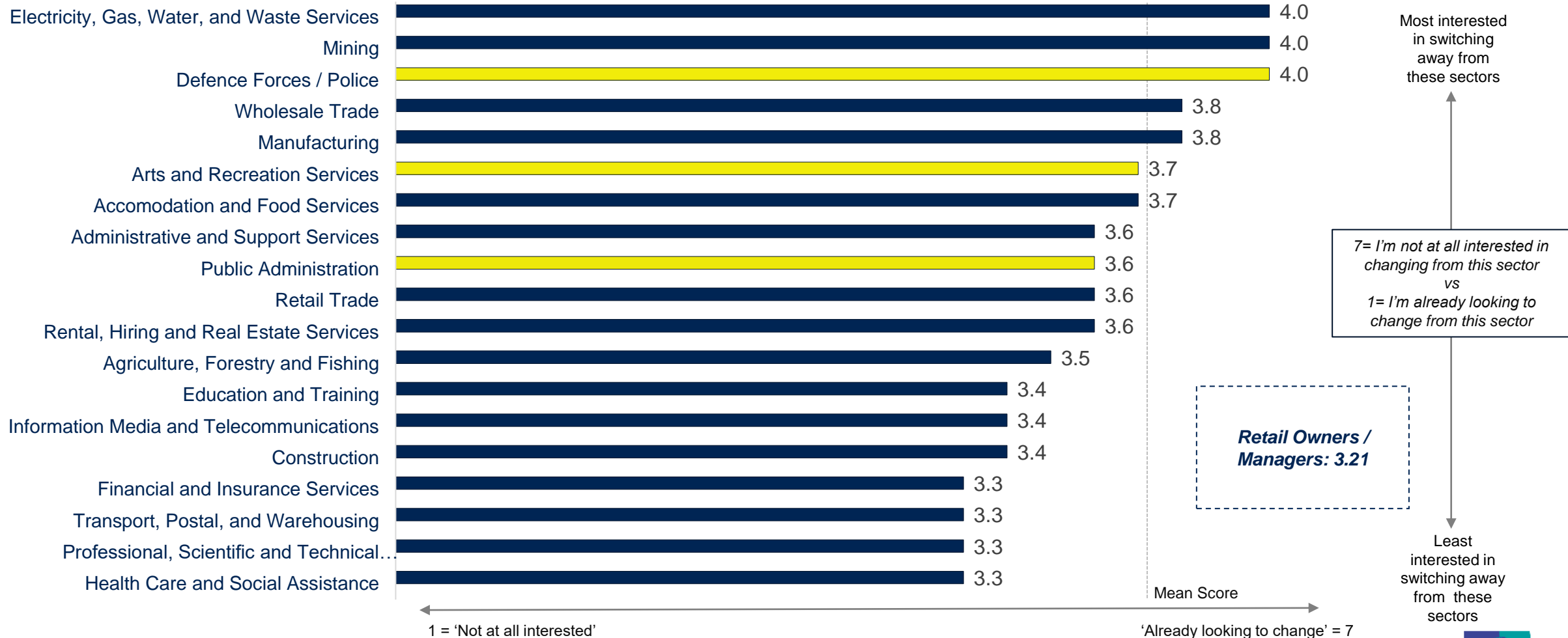
The greatest potential for attracting new entrants to the retail sector lies in those currently working in the **healthcare and social assistance sector**.

The greatest gain in attracting more workers is not going to come from those attracted to retail as they currently understand it, but to change the perceptions of those rejecting it on the basis of their inaccurate impressions.



# OPENNESS TO CHANGING FROM CURRENT JOB SECTOR

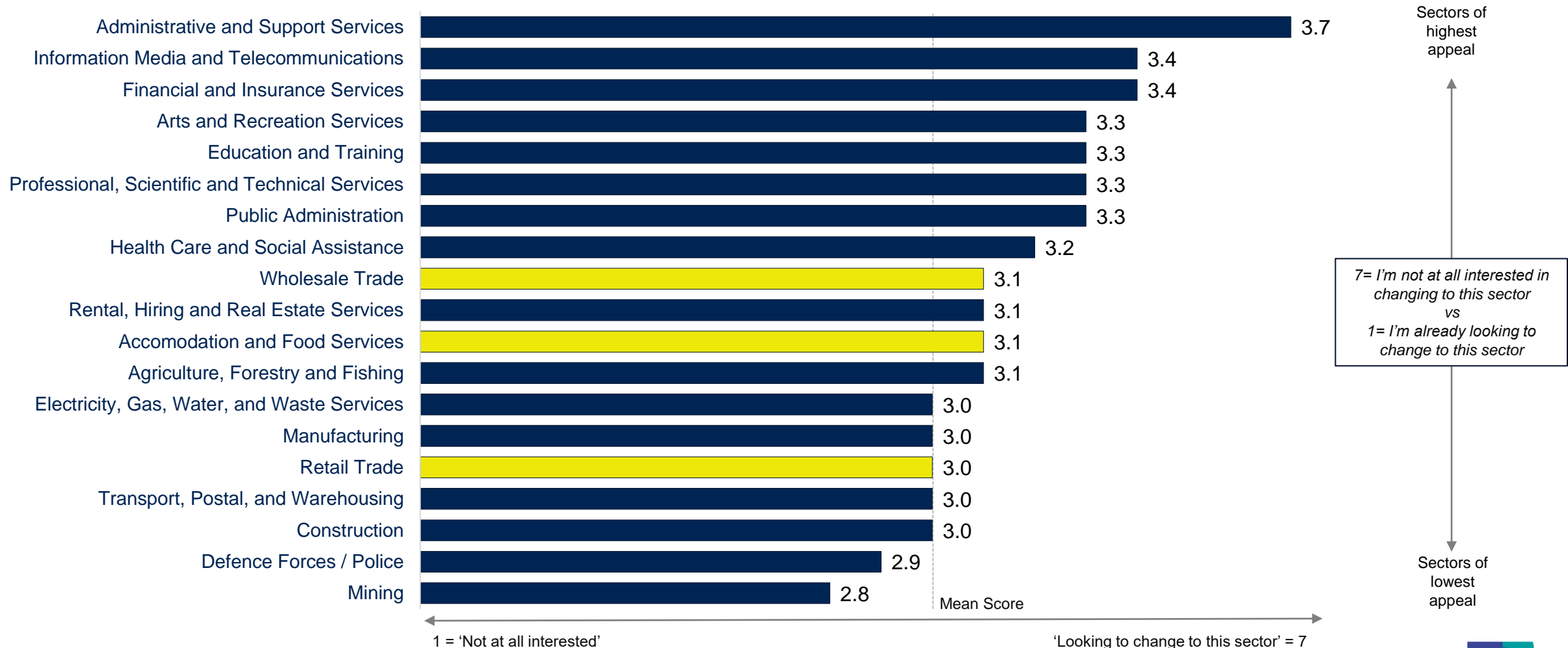
With an average score of 3.6 on the 1-7 scale, the average worker is slightly adverse to the idea of changing their sector of employment, and those in retail are 'average' with a score of 3.6. Those in utilities or the Defence Force are the most interested in switching; those in healthcare and social assistance are the least interested in switching.





# SECTOR APPEAL – OPENNESS TO A JOB IN EACH SECTOR

With a mean attractiveness score of 3.0, the Retail sector has an below-average degree of attraction, with only the Defence Force and mining being less appealing. The high appeal of the administrative / support service sector means that Retail NZ is recommended to highlight such admin roles within the retail sector.

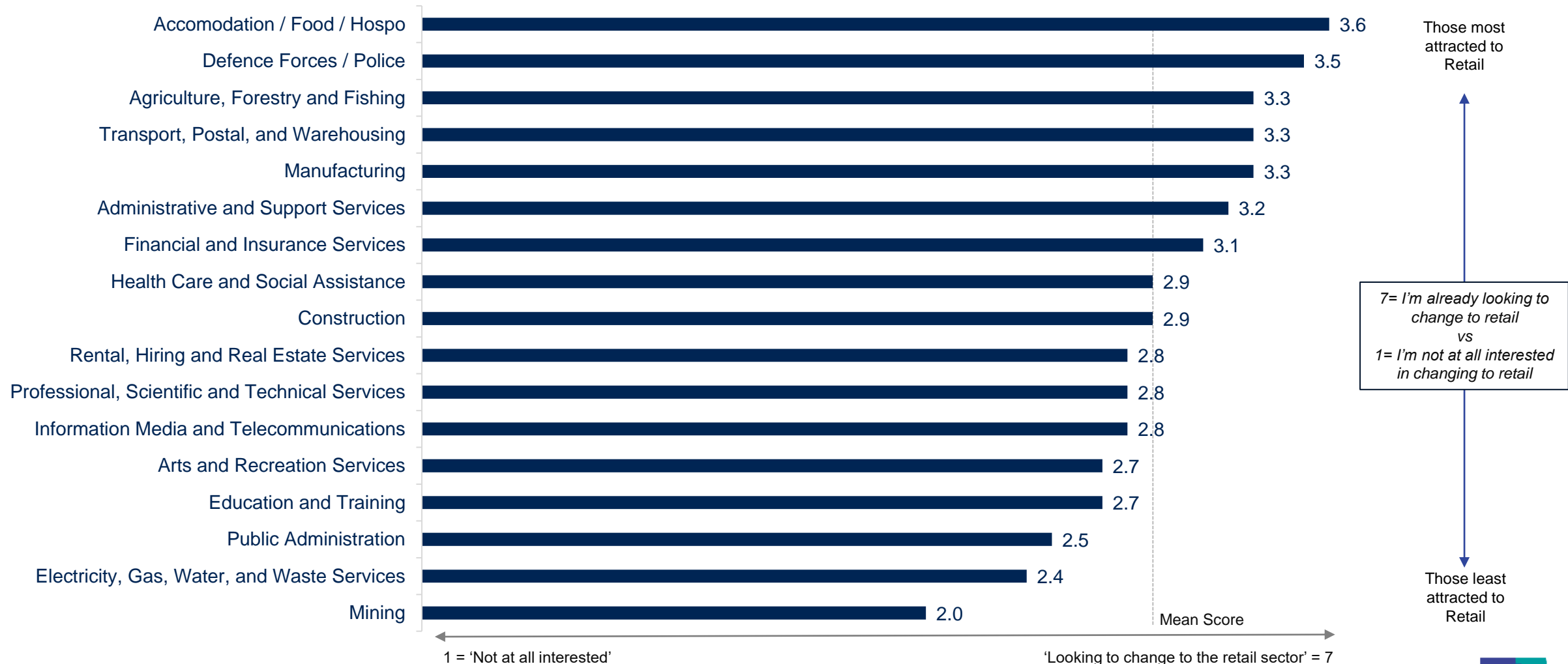


Base: Those open to changing sectors. Respondents were randomly allocated sectors to be asked about to save questionnaire time. Agriculture: n=247, Mining: n=245, Manufacturing: n=244, Electricity, Gas, Water, Waste: n=247, Construction: n=241, Wholesale Trade: n=248, Retail Trade: n=979, Accommodation, Food Services: n=242, Transport, Postal, Warehousing: n=245, Information Media, Telco: n=244, Financial, Insurance Services: n=241, Rental, Hiring, Estate Services: n=243, Professional, Scientific, Technical Services: n=246, Administrative, Support Services: n=245, Public Administration: n=244, Education, Training: n=243, Health Care, Social Assistance: n=243, Arts, Recreation Services: n=244, Defence Forces / Police: n=239

Q9e: How open are you to changing from the industry sector in which you currently work <ANSWER FROM Q6>, to a job in the sector listed below?

# OPENNESS TO A JOB IN THE RETAIL SECTOR

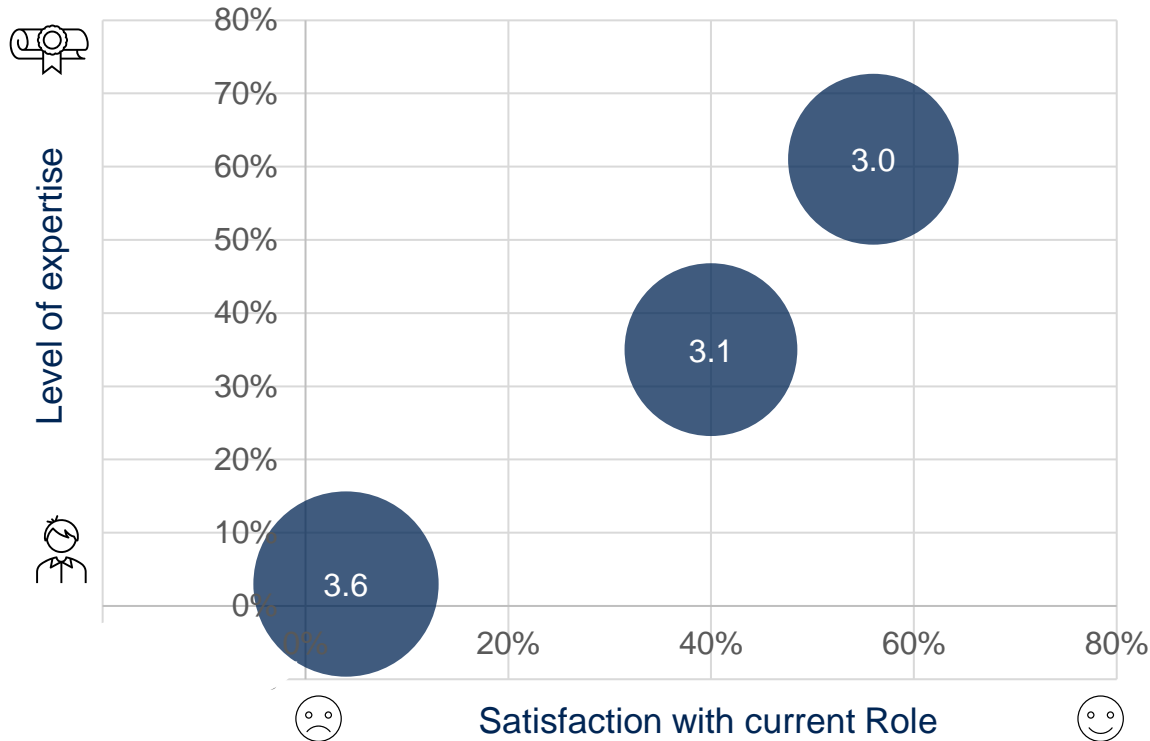
Those most open to a career switch to Retail were those working in Hospitality, the Police or Defence Force, the primary sector, manufacturing or logistics (transport / postal / warehousing). However as discussed later, other sectors offer more overall potential.



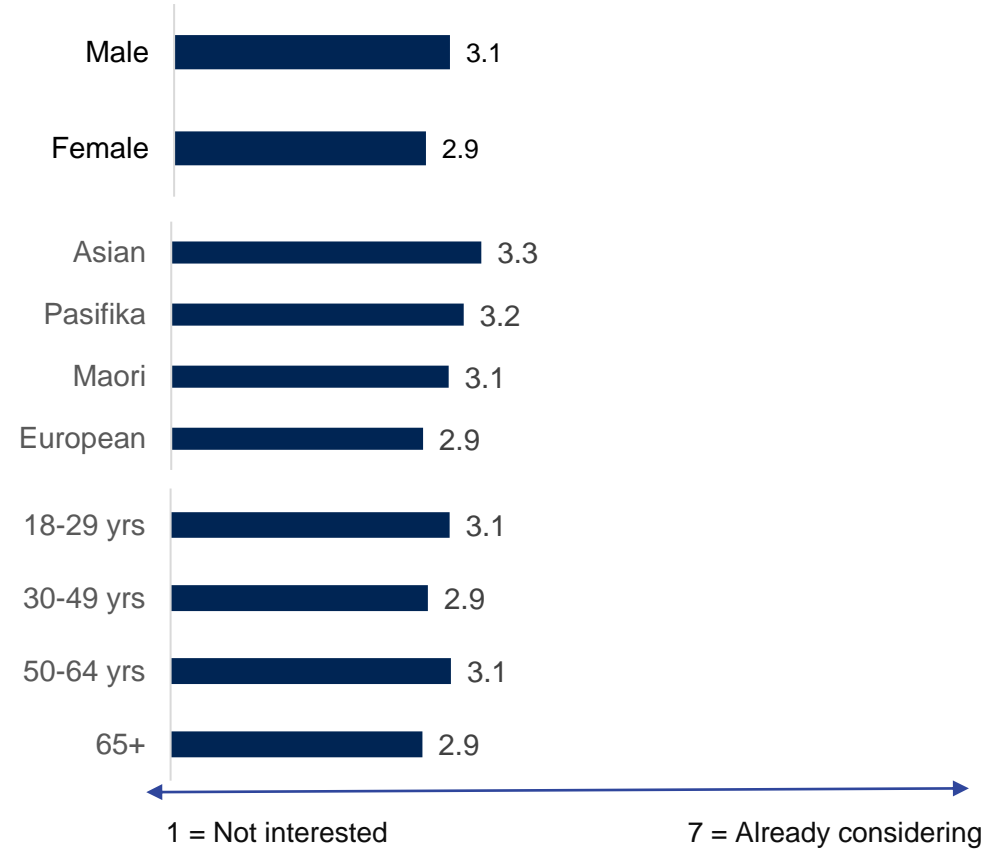
# EXPERTISE, SATISFACTION & INTEREST IN RETAIL

Those most open to switching to a job in retail are those with the lowest level of expertise in their current role, but openness to retail jobs is only slightly lower amongst happier, more experienced people. Those with tertiary qualifications are less interested in retail (mean score 2.7) than less-qualified people (mean score 3.4).

**Openness to a Career in Retail**



**Interest in Retail Career (Mean Scores)**



Base: Total Sample (n=1,437)

Q9a: What do you believe your level of expertise is, in your current role as a <ANSWER FROM Q7B>? Q9b: How satisfied are you in your current role as a <ANSWER FROM Q7B>? Q9c: How open are you to changing your job, to something different than your current job as a <ANSWER FROM Q7B>? Q9d: How open are you to changing from the industry sector in which you currently work to a job in the sector listed below?

# SECTORS OF POTENTIAL GAIN FOR THE RETAIL SECTOR

Sector of current employment	Percent of Total Sample		Openness to Retail Careers		Potential Index
Health Care and Social Assistance	14%	x	2.9	=	41
Professional, Scientific and Technical Services	10%	x	2.8	=	28
Education and Training	10%	x	2.7	=	27
Administrative and Support Services	7%	x	3.2	=	22
Manufacturing	6%	x	3.3	=	20
Financial and Insurance Services	6%	x	3.1	=	19
Construction	6%	x	2.9	=	17
Transport, Postal, Warehousing	5%	x	3.3	=	17
Information Media and Telecommunications	5%	x	2.8	=	13
Agriculture, Forestry and Fishing	4%	x	3.3	=	13
Accommodation / Food services / Hospo	3%	x	3.6	=	11
Public Administration	4%	x	2.5	=	10
Defence Forces / Police	2%	x	3.5	=	7
Rental, Hiring, and Real Estate Services	2%	x	2.8	=	6
Arts and Recreation Services	2%	x	2.7	=	5
Electricity, Gas, Water, and Waste Services	2%	x	2	=	4

Base: The population of New Zealanders aged 16 and over.

Q6: In which industry do you currently work? If you have more than one job, please select your main job.

Q9e: How open are you to changing from the industry sector in which you currently work, <ANSWER FROM Q6>, to a job in the sector listed below?

The 'Potential Index' is the product of how many people are in each sector and their openness to switching to the retail sector.

The calculation shows that the greatest potential for attracting new entrants to the retail sector lies in those currently working in the **Health Care and Social Assistance sector**.

This most likely reflects how such people have to be 'people-focussed' (thereby a good fit for retail) yet are also in a sector known for high stress and under-resourcing.

Other sectors of potential are **Professional, Scientific and Technical Services**, and **Education and Training**.

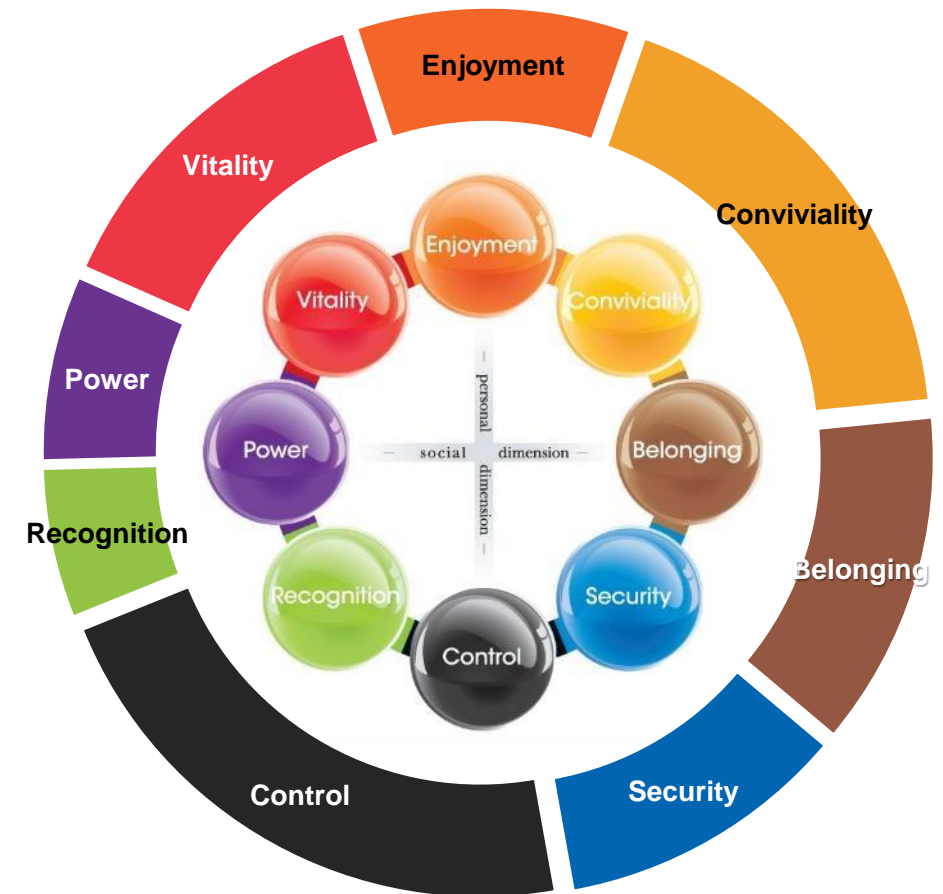
# USING CENSYDIAM TO UNDERSTAND JOB MOTIVATORS

## Retail – the career for friendly, team-oriented perfectionists

The Censydiam framework is Ipsos' proven framework for understanding motivators, recognising how behaviour is a mix of social and personal drivers.

When asked to nominate the elements present in their 'perfect job', those currently employed in Retail were most likely to cite elements of:

- **Control** (61%): Focus on doing things right with high standards.
- **Conviviality** (51%): Being a team player, connecting and collaborating with co-workers.
- **Vitality** (40%): Use energy and passion to explore new opportunities.
- **Belonging** (38%): Caring, accountable, dependable, and a good mentor.

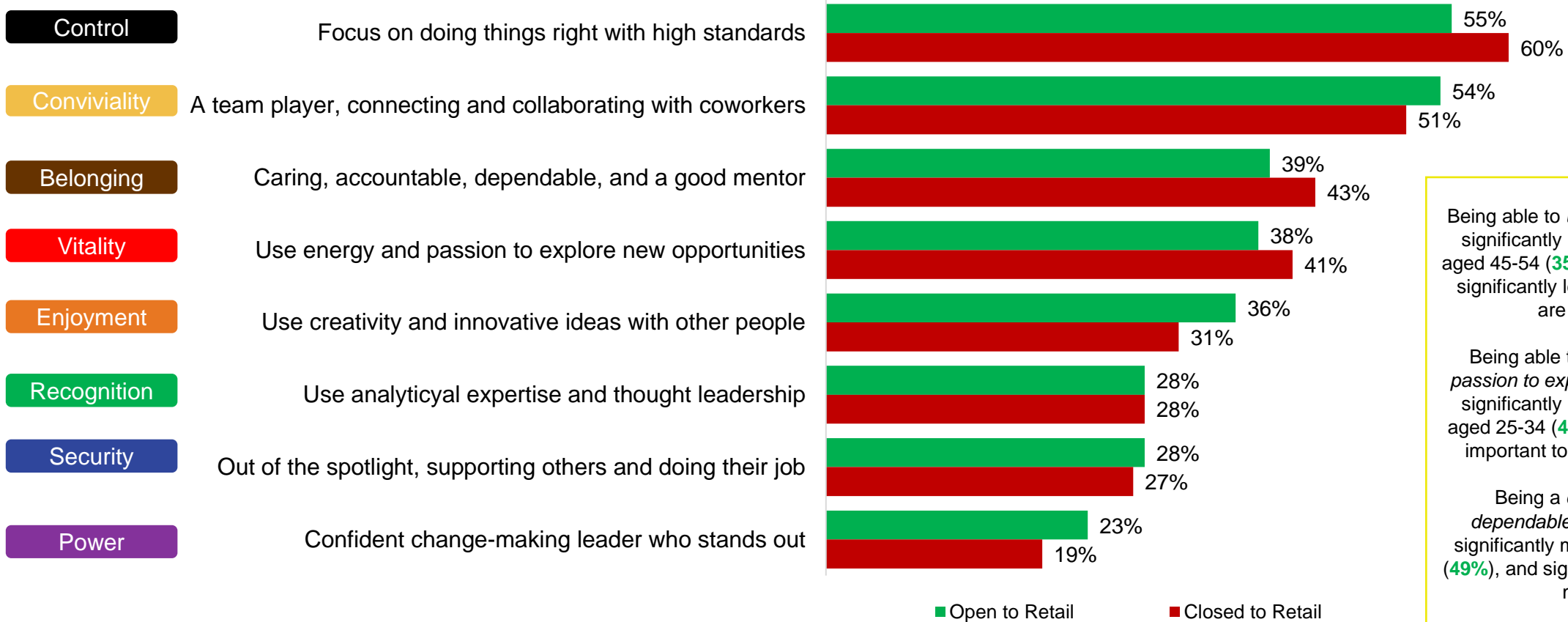


# USING CENSYDIAM TO UNDERSTAND JOB MOTIVATORS

Although the differences were not overly large, those open to a career in retail were slightly more likely to value softer human factors such as Conviviality and Enjoyment but also Power / Leadership. Those closed to retail careers placed more emphasis on Control.

The fact there are few major differences in motivators between those in and not in Retail most likely reflects the wide variety of jobs in retail – these are not all the same people doing the same job.

## Most Important Aspects In a Job – General Population



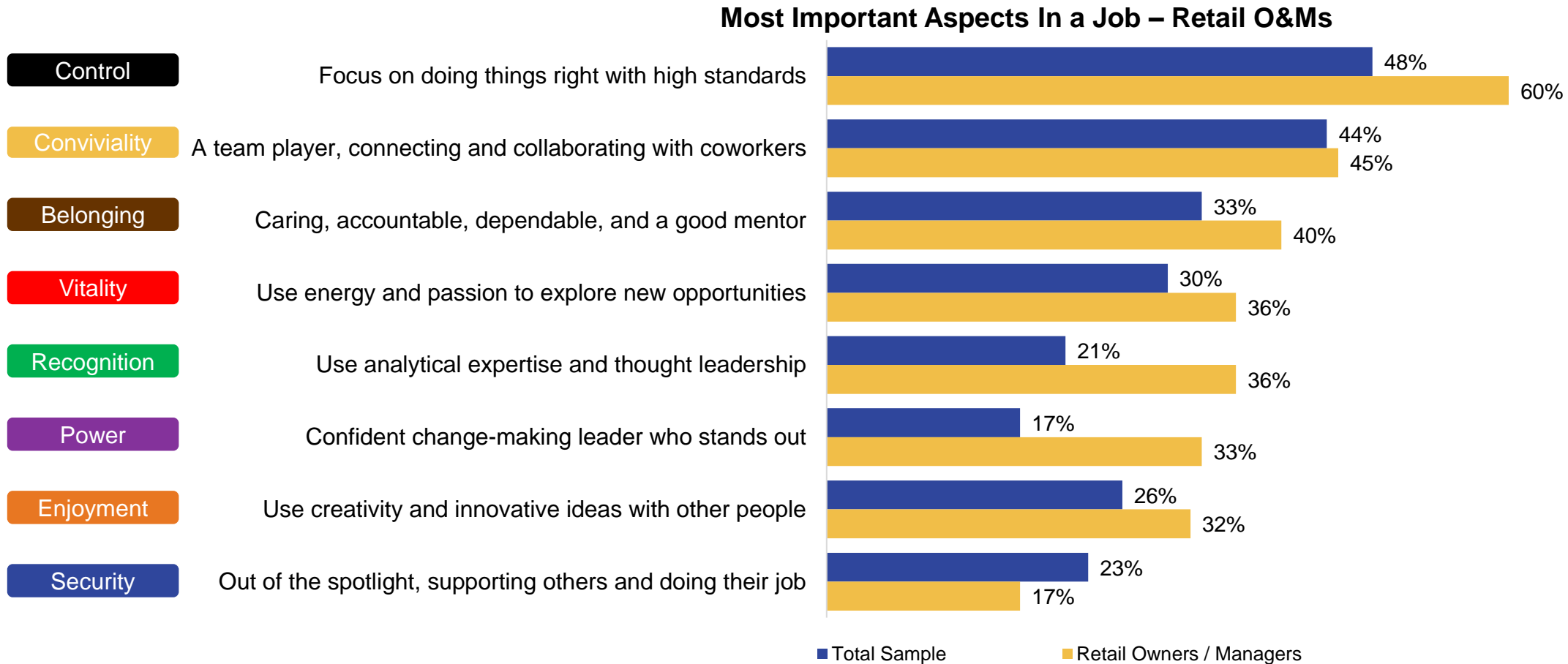
Being able to use *analytical expertise* is significantly more important to those aged 45-54 (**35%**) and males (**33%**), and significantly less important those who are Pasifika (**18%**)

Being able to use *their energy and passion to explore new opportunities* is significantly more important to those aged 25-34 (**43%**) and significantly less important to those aged 65+ (**22%**)

Being a *caring, accountable, dependable, and a good mentor* is significantly more important to women (**49%**), and significantly less important to males (**32%**)

# USING CENSYDIAM TO UNDERSTAND JOB MOTIVATORS

Compared to the general population, Retail O&Ms were more likely to value being in supporting, back-office roles, but overall were still most likely to value performing to high standards as part of a good team.



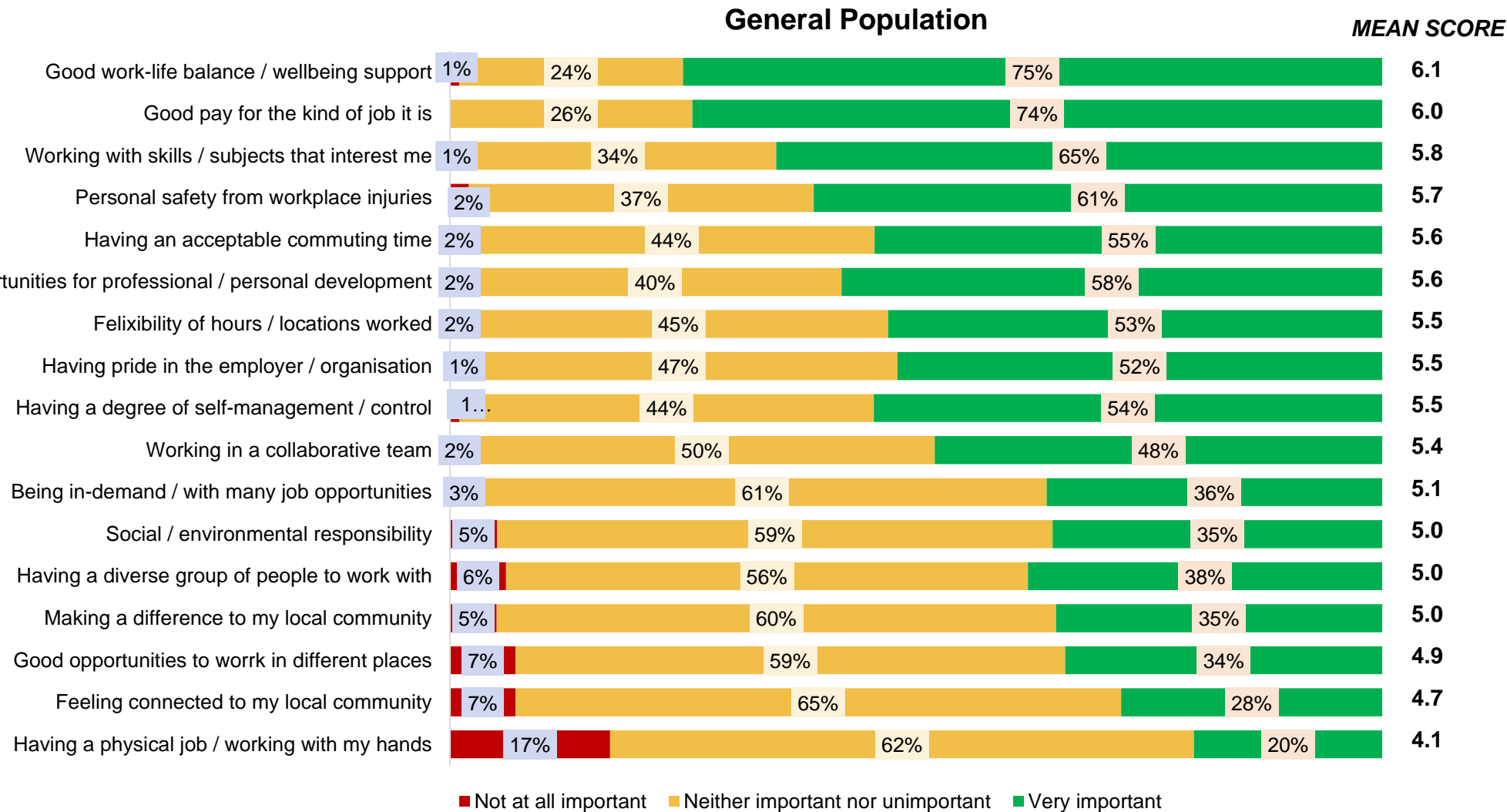
# IMPORTANCE OF FACTORS TO IDEAL JOBS

People seek good pay, interesting work and a balanced life.

The factors of greatest importance in a 'perfect job' are a good work-life balance and pay.

Ideally, these will come from jobs where people can apply and develop their skills in an interesting way, with a degree of autonomy and flexibility.

Factors where retail can perform strongly (e.g. community connections and diverse colleagues) tended to have lower importance.



Base: Total sample (n=1,617)

Q10a: How important are each of the factors listed below when it comes to your ideal job?

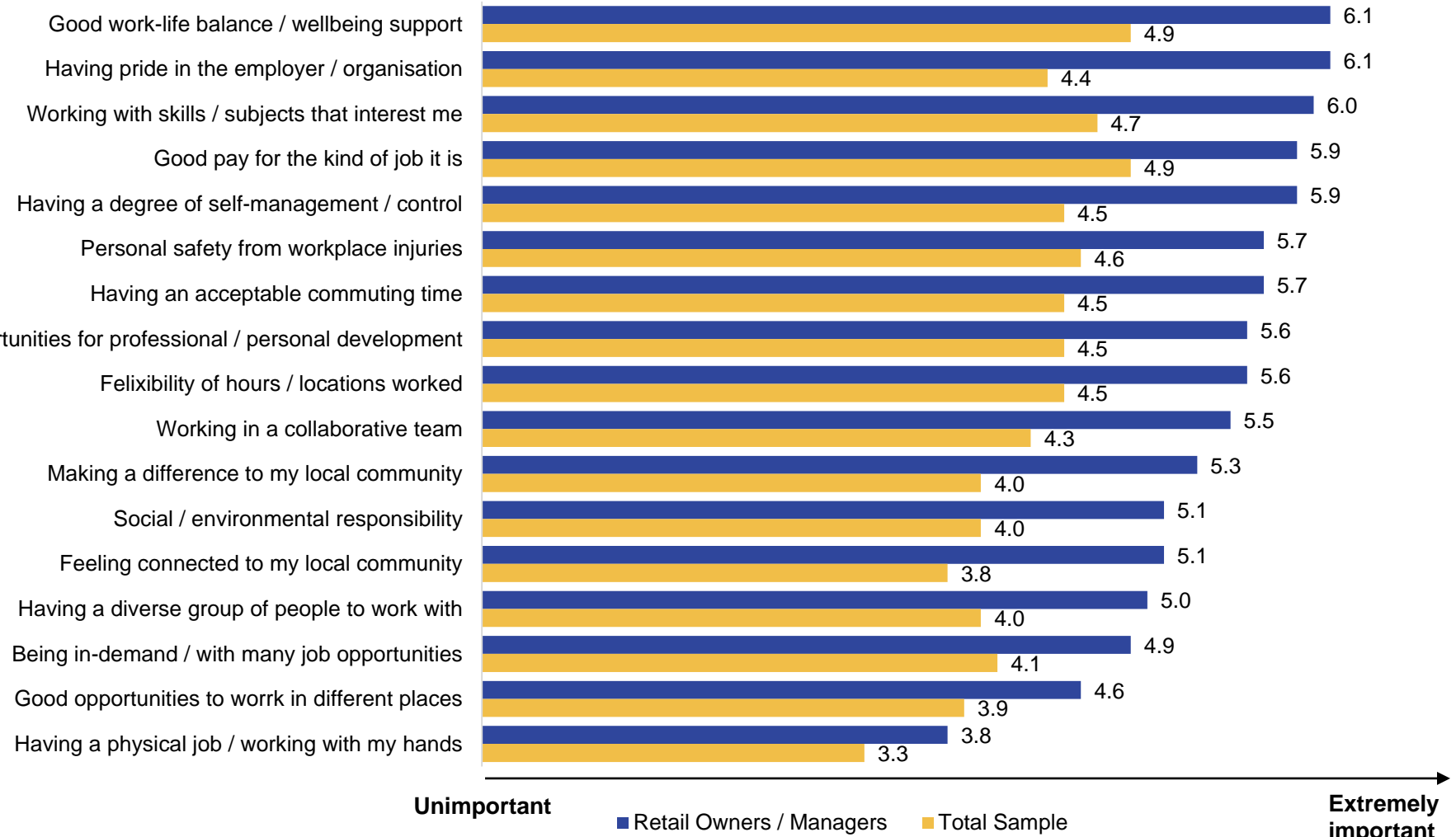


# IMPORTANCE OF FACTORS TO IDEAL JOBS

People seek good pay, interesting work and a balanced life.

Retail O&Ms valued the same things as other people, the biggest difference being in that they place comparatively more value on self management / control.

General Population vs Retail O&Ms



Base: Total sample (n=1,617), Retail Owners / Managers (n=173)

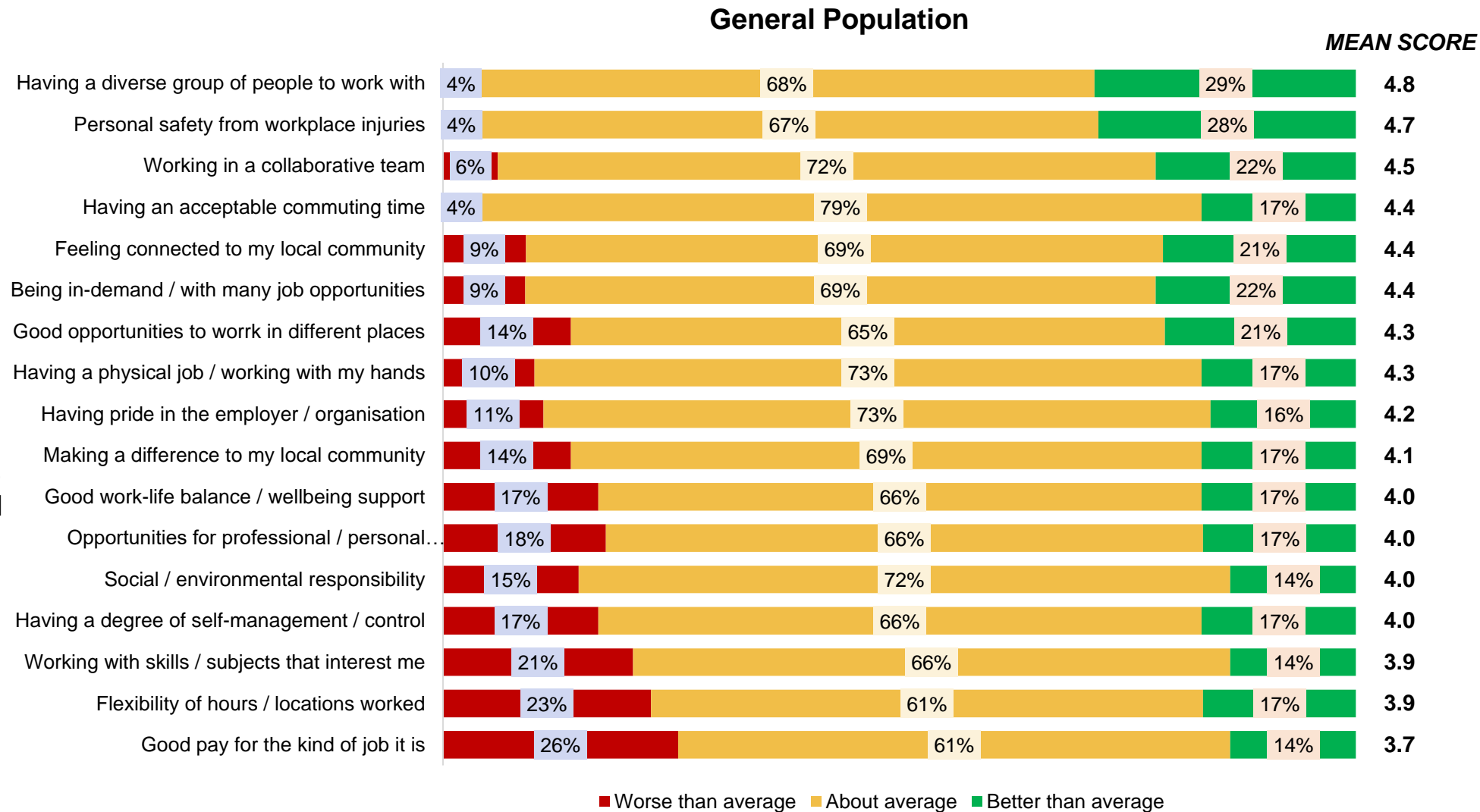
Q10a: How important are each of the factors listed below when it comes to your ideal job?

# HOW RETAIL CAREERS COMPARE

Retail careers are seen to offer diverse colleagues but low pay, high hours and dull jobs.

Retail careers are seen to be particularly strong for teamwork with diverse colleagues; and for having good in-demand opportunities to work in, and feel connected to, different communities.

Given the spate of ram-raids and retail staff attacks in recent months, having only 4% state that retail jobs are 'worse than average' for workplace injuries is positive.

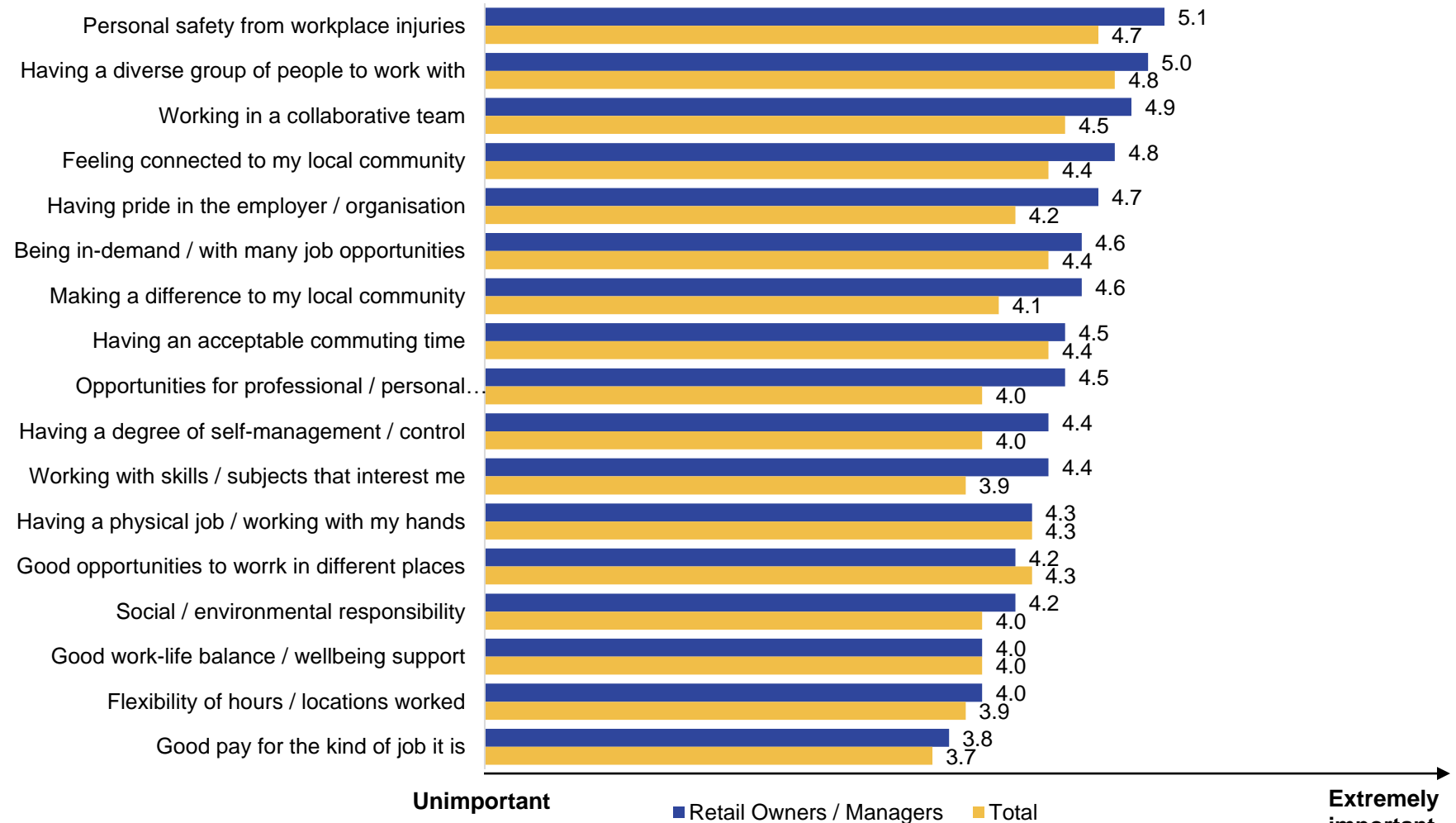


# HOW RETAIL CAREERS COMPARE

Retail O&Ms generally value the same things in the same way as others.

The similarity in what Retail O&Ms value compared to the general population indicates that what the general population values can also be attained via retail careers.

General Population vs Retail O&Ms



Base: Total sample (n=2,002), Retail Owners / Managers (n=173)

Q14: Compared to other sectors where people can be employed, how do you think careers in the retail sector compare when considering the factors listed below?

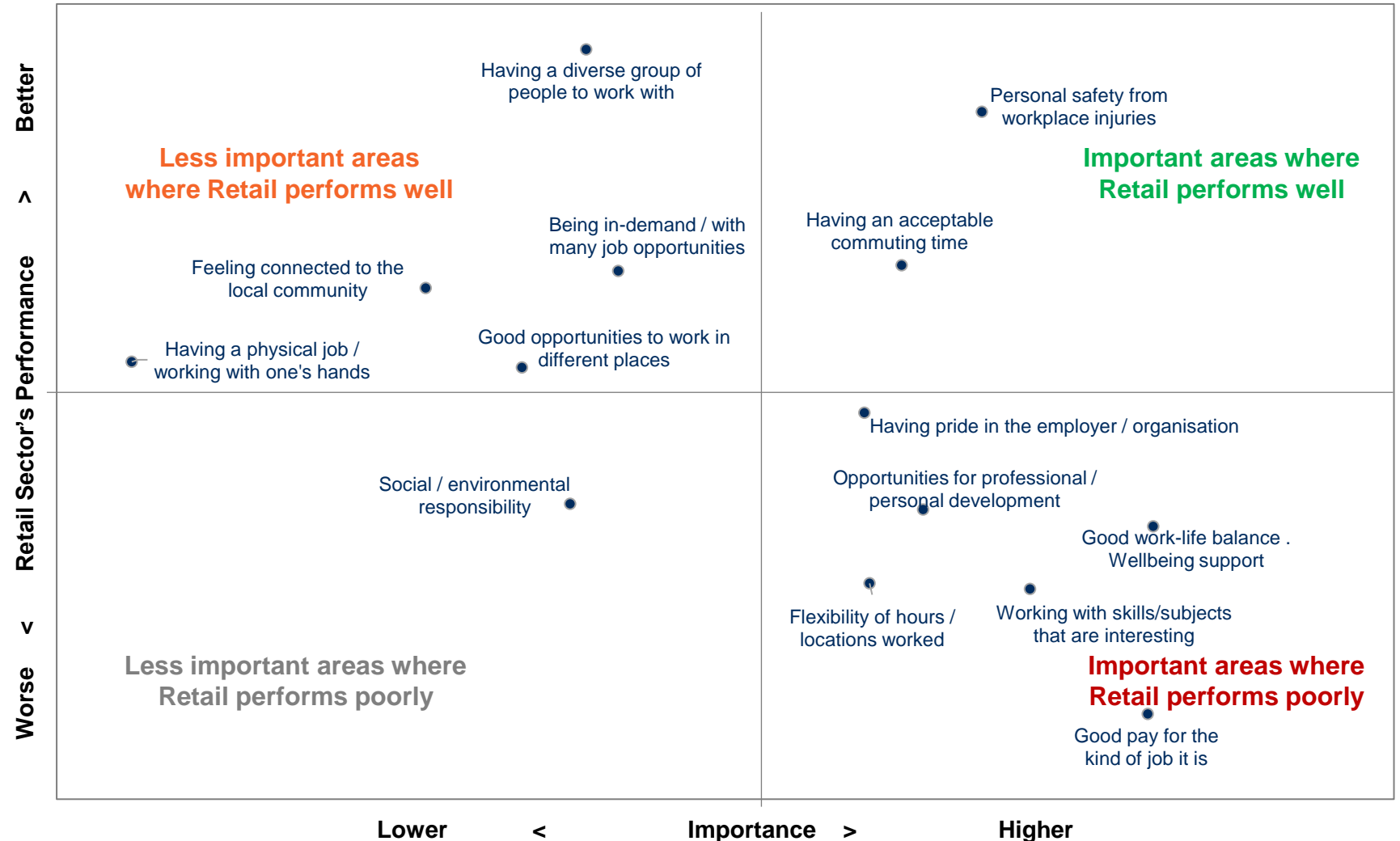
# IMPORTANCE OF FACTORS VS RETAIL PERFORMANCE

Comparing retail's association with these factors with their stated importance indicates that retail is generally seen to be 'worse than average' for most of the more important factors.

Retail is regarded as below-average for these key things:

- Pay
- Work-life balance
- Interesting work / skills
- Opportunities for development
- Flexible hours / locations

These results seem to reflect the prevailing impression that most retail jobs are shop-floor roles, which by definition are encountered when people have leisure time (thereby confirming the impression that they have inflexible hours and poor work-life balance).



# MEET THE AUTHORS

Jonathan Dodd  
Research Director  
[jonathan.dodd@ipsos.com](mailto:jonathan.dodd@ipsos.com)

Hanrie Le Roux  
Senior Research Executive  
[hanrie.leroux@ipsos.com](mailto:hanrie.leroux@ipsos.com)

Samantha Grigg  
Research Executive  
[samantha.grigg@ipsos.com](mailto:samantha.grigg@ipsos.com)

**THANK  
YOU**

**GAME CHANGERS**

