



# Women of the Australian Seafood Industry

## Women's contribution, their roles and what women need to succeed

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2022

FRDC Project 2018-174

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## ACKNOWLEDGEMENTS

We would like to thank all the women and men who contributed to this project, for their time and effort in designing, implementing, promoting and participating in the research to deliver this important and timely work.

Particular thanks are due to the WISA Steering Committee – Karen Holder, Heidi Mumme, Claire Webber, Sam Nowland and Jenny Shaw - who contributed their insights to co-design the research. The Steering Committee were critical to the project's success, with their consistent work to promote the project and encourage participation. They have also been a brilliant source of support and encouragement to us. Thank you to the Women in Seafood Australasia Board and members who also supported the project.

We would like to also thank the interviewees who gave their time so willingly to talk about their experiences, and who informed the direction of the research and the survey. Thank you to Dr Kate Brooks who critically reviewed the survey, and the other people who helped test and pilot the survey. Thank you all who helped us by promoting the survey and encouraging participation.

Finally, we thank Women in Seafood Australasia and the Fisheries Research and Development Corporation for identifying the need for this research as well as supporting and funding this research.

# EXECUTIVE SUMMARY

*Women of the Australian Seafood Industry: Women's contribution, their roles and what women need to succeed*, reports the findings of the research component of the Women in Seafood Australasia (WISA) project: *2018-174 Understanding, supporting and promoting effective participation by women in the Australian seafood industry*.

Women are an important component of the Australian seafood industry, present in every sector working in the supply chain and with the industry, and every organisation type. Until this project, Australia had little data on women's contributions to the seafood industry and the roles women play. Furthermore, there was little industry-wide understanding of women's experiences working in the Australian seafood industry, if and where there are inequalities and gendered differences in experiences, and where barriers lie to women fully participating and progressing in the industry.

This national project used a combination of data sources, including Australian Bureau of Statistics Census data, in depth key informant interviews, and an online survey, to reveal answers to these questions first asked by Women in Seafood Australasia twenty years ago.

## Background

Until this project, how women contribute to the Australian seafood industry has been poorly understood, underestimated and undervalued. A comprehensive and wide-ranging understanding of the current levels of engagement of women in the seafood sector is a valuable resource to the wider seafood sector to increase women's engagement and participation, in an industry that currently needs to attract new entrants and retain them. Having a greater understanding of seafood women also meets the needs of WISA as an organisation delivering support to seafood women.

While women in the Australian seafood industry would benefit from a gender lens and greater inclusivity, the Australian seafood industry would also benefit. Often a business case is made for women's inclusion, that greater gender equity increases organisational performance or gives a competitive advantage. While true, inclusivity and diversity also can improve organisational culture. Male dominated industries, such as the seafood industry, can encourage working conditions that are not good for anyone, including toxic leadership, low psychological safety, poor work life balance, a sexist climate, bullying and sexual harassment, high turnover, and high rates of illness and depression in both men and women. Redressing gender bias could have a transformational impact on the seafood industry. When women are involved in decision making and knowledge production, women are not forgotten and women's perspectives are brought to light. There is value in examining how the gender composition of teams and organisations could impact new ideas, innovation, research, policy and practice, and contribution to long term sustainability of the industry.

## Objectives

This research sought to:

1. Synthesise existing research on women's participation in the seafood industry, their roles, and challenges to entry and progression in the industry

2. Identify existing data sources and new data collection techniques (and their limitations) to monitor women's contributions in the Australian seafood industry
3. Understand women's participation and roles in the different sectors of the Australian seafood industry using existing and new data
4. Understand what women need to have a career and succeed in the different sectors of the Australian seafood industry
5. Identify limitations of the research and future research opportunities to extend this foundational project

## **Methodology**

The research questions were:

1. What is the contribution of women in the Australian seafood industry?
  - a. What is the level of participation of women in the Australian seafood industry?
  - b. What are women's roles in the Australian seafood industry?
2. Who are the women in the Australian seafood industry?
3. What needs to change for women to have a career and succeed in the Australian Seafood Industry?

Three sources of data were used to answer the research questions and meet the objectives of this project. Existing Australian Bureau of Statistics Census data was used to collect quantitative data. Qualitative data was collected using in depth key informant interviews. These interviews, alongside findings from ABS Census data and literature were used to design an online survey yielding both quantitative and qualitative data.

## **Key findings**

1. Women's participation and roles:
  - It is estimated that 24% of the seafood industry's workforce are women, although there is uncertainty around this estimate.
  - Of concern, is the number of women in the seafood industry appears to be declining (by 20% between 2006 and 2016).
  - More than 80% of clerical and administrative jobs are held by women, but women are under-represented compared to men in all other roles including professional and technical roles.
  - While there is a need to uncover more demographic data of the women working in the seafood industry, with the exception of aquaculture, the industry has an aging female workforce similar to the male workforce.
  - There is a high proportion of migrant women working in the industry from southeast and northeast Asian countries.
  - Fewer Aboriginal and Torres Strait Islander women work in the industry than men.
2. Identified areas of inequality and gendered differences in workforce participation and experience:
  - Men dominate the CEO and executive manager positions, with women holding 15% of these roles across the seafood industry, and 17% of seafood businesses are owned by women

- The gender pay gap was 15% for the seafood industry in 2016
- Women do significantly more unpaid domestic labour than men

3. Cultural and systemic barriers to women's progression:

- There is a diversity of experiences and perceptions among seafood women about whether there are cultural and systemic barriers to women's progression in the industry, however findings reveal that cultural and systemic barriers impede a significant proportion of women's progression in the seafood industry
- One in five women in the seafood industry surveyed said there was sexual harassment in their workplace or work environment.
- Women face cultural barriers which impact their experience and progression in the seafood industry. While the majority of women felt they were treated with respect at their workplaces, 27% of women surveyed said that they were not taken seriously as men in their workplaces, 27% of women felt like their skills and experience were always or usually undervalued compared to the men, and 56% of women said that some leadership teams do not value the different perspectives that women bring to the team.
- Women participants were very clear about structural barriers to women's progression. 71% of women surveyed said that having a family can have a negative impact on a woman's career progression compared to men.
- There was a notable difference between men and women responses to cultural and structural barriers, with men less likely to perceive both structural and cultural barriers.
- Proposed ways to overcome cultural and structural barriers include: 1. Applying a gender lens to organisations practices and policies and processes to strengthen understanding of how social norms, systemic barriers, and interpersonal dynamics interact at workplaces; 2. Acknowledging and addressing barriers due to women's responsibilities outside work where they exist; and 3. Organisational and leadership commitment to deep and authentic examination and diagnosis of culture, rejection of poor behaviours, empowerment of people to speak up, and modelling and rewarding desirable behaviours.

## **Recommendations**

1. Recommendations for WISA:

- Identify gaps in knowledge and findings from this research and seek funding for future research to understand the contributions and challenges of women from cohorts not uncovered adequately in this project.

2. Recommendations for employers and organisations:

- Apply a gender lens, for example to policy making, organisation's strategic plans, research priorities, extension programs, and employment and recruitment processes, to strengthen understanding of how social norms, systemic barriers, and interpersonal dynamics interact at workplaces.
- Leaders to generate awareness of the value of changing culture, linked to the organisations core values in an authentic way. Leaders need to publicly reject norms and behaviours that exclude women and other minority groups, empower people to speak up, and model and reward desirable behaviours.

3. Recommendations for improving data on women in the Australian seafood industry:

- Further analysis and data linkage of the Census data on seafood industry sectors and workforces with ABS annual labour force statistics and ATO STP employee statistics is recommended and is likely to improve the reliability and representativeness of population data on the seafood industry workforce and women's participation.
- Repeating the WISA Survey in 2026 and every 5 years would create an informative timeseries to track the seafood industry's progress in achieving a more equitable, inclusive and diverse workforce. In doing so, it is also recommended that the design of questions be reviewed. Comparison of survey responses to positively worded statements compared to negatively worded statements in the 2021 survey indicates that in some cases higher levels of agreement are found when responding to a positively-worded statements, indicating a potential source of bias which warrants investigation.

**Keywords**

Women in Seafood, Gender, Workforce participation, Culture, Bias, Leadership, Sexual harassment, Diversity, Inclusion

# 1. INTRODUCTION

In 2012 it was estimated that globally, one in two seafood workers along the value chain were women (Briceno-Lagos and Monfort 2018; World Bank 2012; Monfort 2015). This estimate was derived from a sample of only 28 countries which record participation in the fisheries and aquaculture sectors by gender. What is clear from this analysis and well noted in the literature, is that there is a lack of gender-disaggregated data reported and available in many seafood producing countries (Gee and Bacher 2017; Monfort 2015; Szymkowiak 2020; Briceno-Lagos and Monfort 2018).

This includes Australia. The need for better data on women's participation in all sectors of the industry as well as what roles women play was identified over 20 years ago (Gill 1999; Aslin, Webb, and Fisher 2000). 20 years later, and until this project, how women contribute to the Australian seafood industry has been poorly understood, underestimated and undervalued, by the wider seafood community.

In a 2017 national survey of Australian seafood industry men and women, 86 per cent of respondents said that being a woman was no barrier to doing any task or role in the Australian seafood industry (Noble, Mantilla, and Gallagher 2017). Yet at the same time, 42 per cent thought that there were jobs that women were particularly suited to (particularly traditional roles such as book work, administration and communications), and 32 per cent did not think or weren't sure that the seafood industry was a good choice for women. 60 per cent of the industry surveyed wanted to know more about what women in the industry do, but 40 per cent didn't want to know or weren't sure if they did.

The 2017 research indicated that there was both a lack of knowledge about women's contribution to the seafood industry and significant barriers to women's participation and progression in the Australian seafood industry. As a result, Women in Seafood Australasia (WISA) sought to answer three key questions through this research project:

4. What is the contribution of women in the Australian seafood industry?
  - a. What is the level of participation of women in the Australian seafood industry?
  - b. What are women's roles in the Australian seafood industry?
5. Who are the women in the Australian seafood industry?
6. What needs to change for women to have a career and succeed in the Australian Seafood Industry?

This research is fundamental and identifies future research needs on gender in the Australian seafood industry. The insights gained from this research alone is unlikely to change the position of women (M. Williams 2019), instead it lays the foundations to support further research and activism for a gender equal Australian seafood industry.

## 2. BACKGROUND

As part of this project, it was important to summarise the international and Australian literature in order to effectively design the project to answer the research questions and meet the objectives.

### 2.1. Why is gender inclusivity important?

*“We need to stop asking what women can do for fisheries and instead ask what can fisheries do for women? How can women in fisheries achieve decent, fair working conditions? How can fisheries change to be gender sensitive and even gender transformative? All of the solutions to overcome the damage of the fisheries boom and now the pandemic, lie in the political economy...whether you are from the government, a fishing company, are a fish worker, a fishing community, women’s coalition, or from research, we urge you to think carefully and look more deeply at how the changes you are helping to make, impact women”*

Meryl Williams, World Fisheries Congress, Adelaide, 2021

A lack of data and understanding of the multiple roles women play in the different sectors of the seafood industry fundamentally inhibits understanding of the whole seafood supply chain (Szymkowiak 2020). Women’s roles in the seafood industry often diverge from men’s, therefore an absence of knowledge about women means entire sub sectors of the industry are missing and overlooked by decision makers including within the seafood industry itself (Gee and Bacher 2017; Szymkowiak 2020; Lambeth et al. 2002; Aslin, Webb, and Fisher 2000).

Ignoring women means there is no consideration or understanding of the effects of changes or shocks on a significant proportion of the seafood industry. Policy, environmental, economic, and technological changes may have different or even disproportionate impacts on women. For example, it has been shown that changes to management of fisheries (e.g. instituting days at sea, area closures, gear restrictions) have marginalised women or favoured the way in which men participate in fisheries over women (Szymkowiak 2020).

Women are critical assets for understanding the impacts of change to the seafood industry and communities. For example, Shaw et al. (2015), argues that women’s invisibility and lack of voice has resulted in lack of implementation and weight given to social impact assessments which would widen impact assessment to all affected by policy change. Social impact assessments have long been called for in management of fisheries and aquaculture and decision making, but are still yet to be mainstreamed (Shaw, Stocker, and Noble 2015; Schirmer 2005; Barclay et al. 2017).

While women in the Australian seafood industry would benefit from a gender lens and greater inclusivity, the Australian seafood industry would also benefit. Often a business case is made for women’s inclusion, that greater gender equity increases organisational performance or gives a competitive advantage. While it has been found that women’s leadership is positively correlated to financial performance (Hoobler et al. 2018), and it is important and relevant to understand the business and economic impacts of gender equality and inequality, there are problems with this argument alone. It limits the ability to understand the value women bring and may not be effective for overcoming prejudice and bias against the inclusion of women or other under-represented groups (Fine and Sojo 2019).

In terms of benefits to the seafood industry as a whole, firstly, gender balance can improve organisational culture. Male dominated and highly masculine industries, such as the seafood industry, can encourage working conditions that are not good for anyone, especially women who have to try to 'play the game' to survive while also balancing any backlash for doing so. This type of culture has been shown to result in toxic leadership, low psychological safety, poor work life balance, a sexist climate, bullying and sexual harassment, high turnover, and high rates of illness and depression in both men and women (Berdahl, Glick, and Cooper 2018).

Secondly, redressing gender bias could have a transformational impact on the seafood industry. When women are involved in decision making and knowledge production, women are not forgotten and women's perspectives are brought to light. There is value in examining how the gender composition of teams and organisations could impact new ideas, innovation, research, policy and practice, and contribution to long term sustainability of the industry (Fine and Sojo 2019).

Finally, there are the ethical values of fairness, honesty, compassion and respect which should trump a business case or a need for women to demonstrate their value to be included (Fine and Sojo 2019).

## 2.2. What we know about women's participation and roles in the seafood industry

Seven years ago, Monfort (2015) undertook an extensive global review of women's participation and roles in the seafood industry for the United Nations, reporting major findings by sector. The findings of this review (focussed on developed countries results) as well as key international literature since 2015 are presented with the existing Australian research in [Appendix 1](#).

The search for Australian literature, which specifically reported findings on the level of participation and gendered division of labour, uncovered only seven studies ([Appendix 1](#)). None of the studies systematically collected data on women's level of participation and division of labour by sector, for all key sectors of the Australian seafood industry. As such, what we can understand about women's participation and roles from previous research has many gaps, with sectors of the seafood industry missing completely. There are some other limitations of the Australian literature, including:

- Three of the studies are 20 years old and some of the findings may be out of date
- Many of the studies have had objectives different to the basic aim of understanding participation and roles of women, which has limited the relevance of the findings
- Some studies did not disaggregate findings by sector, or sectors have not been represented in the studies, which means that it is difficult to understand the level of participation and division of labour within sectors, and for some sectors we have very little to no understanding of women's roles.
- In-depth case studies have revealed significant insights into women's roles in the seafood industry, but it is still unknown how generalisable these findings are.

In the review, the sectors of the seafood industry were identified, including the production sectors – fishing and aquaculture; post-harvest sector – processing and trading (wholesale and retail); government agencies; and the services sector - industry representative associations, consulting, non-government organisations and universities.

As expected, statistics on the participation of women in the seafood industry by sector are sparse for Australia and internationally in developed countries (Monfort 2015; Kruijssen, McDougall, and Asseldonk 2018). It appears we know most about women's participation and roles in the fishing and processing sectors. In the Australian literature on women's roles in the industry, most of the focus has been on women's contributions in fishing family businesses, and there was some early ethnographic work in fishing (at sea) and processing sectors. However, other sectors are data poor. In line with the international literature, women's participation in the Australian seafood industry are inadequately reflected in statistics. The latest government report provided statistics from ten years ago and revealed that women comprised 28% of the Australian seafood industry, and similarly to other developed countries, most of the women were employed in on-shore and post-harvest sectors (ABARES 2015; Lambeth et al. 2002; World Bank 2012). Within each sector, internationally, women tend to occupy the lower ranks of the hierarchical ladder which coincides with lower wages and less power, with women often absent from decision-making positions and processes (Monfort 2015; Briceno-Lagos and Monfort 2018; Zhao et al. 2013; Brugere and Williams 2017). 2011 data revealed that women's employment in the Australian industry tends to be in manual labour or unskilled jobs (35%) or clerical and administrative roles (34%). While over a fifth of women who identified as working in the seafood industry were owner-managers of the operation they worked in (ABARES 2015), similar to international literature, few women are present in senior positions and decision-making roles (Lambeth et al. 2002; Noble, Mantilla, and Gallagher 2017).

Perhaps most importantly, the literature reveals how little is known about women's participation and roles in the Australian seafood industry. There are sectors where we have little to no information at all about where the women work, who they are and what they do. These sectors include aquaculture production, seafood trading, industry associations, government agencies, consultancy, NGOs and university sectors.

### 2.3. What we know about the quality of women's participation

*"Behind the apparent parity in number, the disparity in position and power is abysmal"*  
(Monfort 2015)

#### Position and renumeration

It is shown internationally that the women of the seafood industry are paid less than men. Throughout the world and no matter which sector of the seafood value chain, women are more numerous in less profitable sectors, in jobs where the wages are lower, and where the work is less secure (Monfort 2015; Kruijssen, McDougall, and Asseldonk 2018; Zhao et al. 2013). Yet in these roles, women are often valued for their efficiency (Monfort 2015).

As an example, in the UK where women make up almost half of the workforce in seafood processing (45%), they only earn 69% of what men earn (Zhao et al. 2013). In aquaculture production in the UK, the pattern is the same with women earning only 71% of what men earn (Zhao et al. 2013). A study in Alaska showed men's average revenues in fishing production compared to women's were consistently and significantly higher. This is because women's participation was constrained by season and thus into lower value fisheries compared to men. Women in fishing also had more variable annual revenues suggesting greater volatility and risks for women in the sector (Szymkowiak 2020).

Women's work in fishing family businesses is often unpaid (Lambeth et al. 2002). Their work may be perceived to be part of the household duties, they may not be formally recognised as employees or documented as a partner in the family business (Monfort 2015; Frangoudes and Gerrard 2019; Szymkowiak 2020; Shaw, Stocker, and Noble 2015; Schirmer 2005). Often women in fishing families do not recognise their own contribution (Zhao et al. 2013).

In the seafood industry jobs where the conditions, security and pay are better, there are fewer women (Monfort 2015). It is well established that men in the seafood industry tend to hold the more senior management, decision-making and leadership roles, translating into better renumeration. The higher in the hierarchy, the more seldom are women seen in the seafood industry (Monfort 2015). Briceno-Lagos and Monfort (2018) report that over half of the 67 top seafood companies are run exclusively by men, with no woman as director or board member, and overall men occupy 90% of all board directorships.

### Organisational culture

In 1997, it was identified that women's voices were being limited by others' perceptions and a lack of acceptance by men in the male-dominated Australian seafood industry (Miller 1997). This was reinforced in 1999 when the majority of 200 women surveyed believed women faced overt discrimination and prejudice from men involved in the seafood industry, from being denied onboard boats, to the culture of organisations denying women leadership positions (Aslin, Webb, and Fisher 2000). While this type of discrimination may seem outdated, subsequent studies indicate there hasn't been a huge shift. In a 2015 paper on women's perspectives of change in a Rock lobster fishery in Western Australia Shaw et al. (2015) state that:

*"the dominant position of men in the industry has fiercely been protected by men in the industry"* and there exists a *"fallacy of the lack of women's knowledge"*,

rendering women invisible and their perspectives unheard. This position of women has also been validated by women in fishing communities specifically, who suggest that fishing is an undesirable occupation for women (Shaw, Stocker, and Noble 2015; Dowling 2011; Noble, Mantilla, and Gallagher 2017). The 2017 survey of Australian seafood industry members further revealed there are still strong feelings that women are not as valued as men in the industry, and one third of respondents said that the seafood industry was not career choice for women because of lack of promotion and career progression opportunities (Noble, Mantilla, and Gallagher 2017).

A 2017 global survey of 700 seafood professionals from multiple sectors (production, post-harvest, services sectors) shared their perceptions on the situation of women at their workplaces and in the seafood industry. The survey exposed pervasive gender-based discrimination, strong prejudices and unequal opportunities for women, yet there was a lack of problem recognition within the industry itself (Briceno-Lagos and Monfort 2018). 58 per cent of all respondents said gender issues were not talked about in their organisation. For 39 per cent of respondents, gender was not talked about because it was perceived there was no gender inequality, a perception held by more men (55%) than women (34%). However, most respondents (47%) felt that gender was not discussed because gender inequality was not recognised (Briceno-Lagos and Monfort 2018). If the issue of gender inequality is not recognised, especially by decision-makers in organisations, then the status quo remains. This

also means that unconscious bias in recruitment of employees and negative bias against women being evaluated for positions traditionally held by men (Isaac, Lee, and Carnes 2009).

The culture of the seafood industry could also be responsible for the perception that the seafood industry is not equally attractive to women and men (Briceno-Lagos and Monfort 2018).

Discrimination, unequal opportunities, unfavourable working conditions with real penalties for balancing family life, the presence of an 'old boys club' could all be factors in why women are not present in higher positions in organisations – they are choosing not to be.

### Support

A key barrier often cited by earlier Australian research, is that women's entry and progression in the industry is limited by their commitments to their families which is not accommodated for (Miller 1997; Lambeth et al. 2002). In the 2017 Australian survey, there was still some evidence that roles within the seafood industry remain inflexible and incompatible with women's roles outside of work (Noble, Mantilla, and Gallagher 2017). For example, one respondent said:

*"I am at a time where my outside priorities are changing and starting a family is on the cards. I feel that if I became a mother I wouldn't be able to meet the requirements of [scientific] fieldwork with a young family making it very hard to be away from home. It would then for me, become unsuitable"*

Like many industries, the seafood industry has been shaped by men, and the conditions of participation of both genders have been organised according to these norms at all levels, from labourers to decision-makers. Monfort (2015), in her review, found that women all over the world are constrained by strong norms and societal conventions, from taking opportunities because of incompatibility with family commitments and from lacking access to the 'old boys network' which could support and facilitate career progression. A lack of women's access to mentoring and champions to progress in their role has been identified as a key barrier to women in the seafood industry over the past twenty years (Miller 1997; Noble, Mantilla, and Gallagher 2017).

## 3. OBJECTIVES

The objectives of this project are broad. They include understanding the current state of knowledge of women working in and with the Australian seafood industry, examining existing data sources and developing new data sources, answering the research questions, and looking to the future in terms of research needs, as well as identifying how the Australian Seafood Industry can make improvements to break down structural and cultural barriers to women participating and progressing in the industry.

6. To synthesise existing research on women's participation in the seafood industry, their roles, and challenges to entry and progression in the industry
7. To identify existing data sources and new data collection techniques (and their limitations) to monitor women's contributions in the Australian seafood industry
8. To understand women's participation and roles in the different sectors of the Australian seafood industry using existing and new data

9. To understand what women need to have a career and succeed in the different sectors of the Australian seafood industry
10. To identify limitations of the research and future research opportunities to extend this foundational project

## 4. METHODS

### 4.1. STEERING COMMITTEE

This project was guided by a steering committee, made up from members of Women in Seafood Australasia (WISA). Steering committee members were Karen Holder (President WISA), Heidi Mumme (Vice-president WISA), Claire Webber (Director, WISA), Sam Nowland (Director, WISA) and Dr Jenny Shaw (Member, WISA). The steering committee strongly engaged in the project design and development, including developing research questions; design and review of key informant interview guidelines; multiple revisions and piloting of the online survey; recruiting participants for key informant interviews and the online survey (through networks and social media); discussing analysis; and supporting the authors' progress.

### 4.2. RESEARCH QUESTIONS AND DATA SOURCES

Three sources of data were used to answer the research questions and meet the objectives of this project. Existing Australian Bureau of Statistics (ABS) Census data was used to collect quantitative data. Qualitative data was collected using in depth key informant interviews. These interviews, alongside findings from ABS Census data and literature were used to design an online survey yielding both quantitative and qualitative data.

Five key sectors were identified for the Australian seafood industry (with subsectors in postharvest and service sectors) to collect data for and analyse (Table 1). It was important to not only understand the women who work *in* the seafood industry (in the supply chain) but also women who work *with* the seafood industry.

The data sources were also mapped to the research questions (See Table 2).

Table 1. Sectors of the Australian Seafood industry analysed and data collection methods

Sector type	Sector	ABS Census	Key informant interviews	Online survey
Production	Fishing	✓	✓	✓
Production	Aquaculture	✓	✓	✓
Post-harvest	Processing	✓	✓	✓
	Wholesaling	✓	✓	✓
	Retailing		✓	✓
Government	Government		✓	✓
Services	Industry representative associations		✓	✓
	Consulting services		✓	✓
	University		✓	✓

Table 2. Research questions, sub questions and data collection methods

Research question	Sub questions	Instruments
1. What is the contribution of women in the Australian seafood industry	Level of participation of women in the Australian seafood industry	Census Key informant interviews Survey
	Women's roles in the Australian seafood industry	Census Key informant interviews Survey
2. Who are the women in the seafood industry?	Age	Census Key informant interviews Survey
	Education	Census Key informant interviews Survey
	Ethnicity	Census Key informant interviews Survey
3. What needs to change for women to have a career and succeed in the Australian Seafood Industry?	Job security	Census Key informant interviews Survey
	Freedom from sexual harassment	Key informant interviews Survey
	Being respected, valued and included	Key informant interviews Survey
	Having enough support to access networks and champions, responsibilities outside work, and to resolve issues	Key informant interviews Survey
	Having equal access to progressive opportunities	Key informant interviews Survey
	What can WISA offer to contribute to changing women's opportunities?	Key informant interviews Survey

### 4.3. ABS CENSUS DATA

ABS Census of Population and Housing, Employment, Income and Education from 2006, 2011 and 2016 were extracted using ABS Census Table Builder Basic, an online tool for creating tables from ABS Census data <https://www.abs.gov.au/statistics/microdata-tablebuilder/tablebuilder>.

Four sectors of the Australian seafood industry were identifiable including aquaculture, fishing, processing and wholesaling.

Specifically, data were extracted for the four sectors and comparable sectors (agriculture, food manufacturing, grocery wholesaling and Australian workers overall), and examined in terms of state/territory, occupation, unpaid domestic labour, age, education, ethnicity, and wages.

### 4.4. KEY INFORMANT INTERVIEWS

22 women were interviewed using a semi-structured interview guide (See [Appendix 2](#)). Interviews were conducted via Zoom and lasted between one and 1.5 hours. The interviews covered the questions in the interview guide but also topics outside of the guide were discussed as led by the interviewee.

Interviewees were selected based on their expertise. Interviewees were selected from a list of 121 women put forward by the WISA steering committee and board. The mean years' experience of the women interviewed was 15 years (min 3, max 30). The criteria for selection included:

- (i) Engagement in their sector more broadly. E.g. through business or organisation connections as managers, or through leadership positions such as sitting on committees or boards
- (ii) Scope of knowledge and connections at least State-wide
- (iii) Knowledge about other businesses/organisations in their sector (horizontal knowledge) and about women's employment and roles in their sector (vertical knowledge)

The sampling criteria of interviewees was also based on expectations of what may affect women's experiences in the seafood industry. Efforts were made to ensure representation of:

- (i) All nine sectors (See Table 3). A greater number of interviewees were selected for sectors not represented in ABS data. Some interviewees covered more than one sector in their expertise. This was particularly the case in production and post-harvest businesses which are often vertically integrated to a certain extent.
- (ii) Across jurisdictions (See Table 4).
- (iii) Metropolitan (14 interviewees) and regional geographies (8 interviewees)
- (iv) Small and large organisations (>20 employees = 13 interviewees; ≤20 employees = 9 interviewees)
- (v) Ages (12 interviewees under 50 yrs; 10 interviewees over 50 yrs)
- (vi) Ethnicity

Interviews were used to:

- Inform the online survey design
- Provide qualitative data to support other data sources in the results

*Table 3. Number of interviewees by sector*

<b>Sector</b>	<b>No. interviewees</b>	<b>Additional criteria</b>
Fishing	2	1 x small*, 1 x large
Aquaculture	2	1 x small*, 1 x large
Processing	3	
Wholesaling	4	
Retailing	3	
Industry representative associations	3	1 x regional, 1 x state, 1 x national
Government	2	1 x state, 1 x federal
Consulting services	1	
University	2	

\* Note: Small businesses = 20 or less employees, Large business = more than 20 employees

*Table 4. Number of interviewees by jurisdiction*

<b>Jurisdiction</b>	<b>No. interviewees</b>
NSW	3
VIC	5
QLD	3
NT	2
SA	2
TAS	3
WA	3
ACT	1

## 4.5. ONLINE SURVEY

### 4.5.1. Design

The online survey was designed and informed by literature, findings from the ABS Census analysis and the key informant interviews.

Data were collected in five sections of the survey:

1. Individuals work (including years in the industry, sector, role, and details about the organisation)
2. Demographic information (including gender, age, ethnicity, education, caring responsibilities)
3. Personal experiences as a woman working in or with the seafood industry
4. General perceptions and observations about the seafood industry overall
5. If and how the participant would like to engage and learn from women in the seafood industry

The survey was open to men and women. Women were asked to complete all five sections, while men completed sections 1, 2 (gender only), 4 and 5.

Sections 3 and 4 collected data on five key topics identified by key informants and the literature on what women need to have a career and succeed in the Australian seafood industry, including

- Having job security
- Freedom from sexual harassment
- Being respected, valued and included
- Having enough support to access networks and champions, responsibilities outside work, and to resolve issues
- To have opportunities to progress

The survey was designed to be as short as possible while still collecting valuable data. The final survey took approximately 10 minutes for women to complete and 5 minutes for men to complete.

Survey Monkey <https://www.surveymonkey.com/> was used for the online survey. The survey was launched at the World Fisheries Congress (23 September 2021) and closed 30 November 2021.

See [Appendix 3](#) for survey.

#### 4.5.2. Review

A number of iterations of the survey were reviewed to refine the survey to minimise question number, ensure interpretation, and to facilitate ease of participation. The authors engaged the steering committee in the review process. In addition, the authors sought expertise from an independent social scientist, Dr Kate Brooks, to review the survey. The survey was then piloted with eight participants, both women and men.

#### 4.5.3. Recruitment

Women who work in or with the Australian seafood industry were considered to be a 'hard to reach' population for a number of reasons. There is no way to estimate the total population of women who work in or with the seafood industry, and it is impossible to 'census' women or identify a representative sample because women often do not appear on 'lists' even if they are deeply involved in the industry (e.g. fishing and aquaculture licence holders or peak body representative organisation mailing lists).

Surveys on women in the past have mostly relied on FRDC networks, however we wanted to try to reach participants who would also not usually engage in the FRDC space. It was determined the best method to recruit participants was through snowball sampling and acknowledge the inevitable biases.

A number of methods and networks were used over the two months the survey was open to recruit both women and men from all sectors to participate:

- Emails including project explanation, survey link and encouragement to forward to own networks were sent. These included 1. original email, 2. reminder email and 3. final reminder email:
  - Authors and steering committee networks

- WISA members
- 121 women nominated to be key informant interviewees
- 22 key informant interviewees
- All industry associations
- List of post-harvest businesses identified through <https://www.sea-ex.com/>
- Seafood Industry Australia
- NSILP alumni
- Oceanwatch
- Centre for Marine Socioecology digest
- ASFB Fisheries Management sub-committee
- Queensland Seafood Marketers Association
- Australian seafood industry professionals
- Promoted through World Fisheries Congress 2021 talks and online forum (survey launch)
- FRDC Message in a Bottle newsletters for duration of survey
- AMSA Working Boats online magazine
- Social media platforms of the following organisations:
  - WISA
  - FRDC
  - AMSA
  - Affectus
- Printable flyer with QR code distributed (e.g. to be posted in workplaces where people gathered)

#### 4.5.4. Participant characteristics

A total of 509 people participated in the survey, with 79% identifying as female (n=403) and 21% as male (n=106).

Participant characteristics (below) were used to analyse responses to survey questions descriptively.

##### Location

Each state/territory jurisdiction was represented in the response rate, with the highest response rate from participants working in South Australia (19%). The split between people who worked in metropolitan and regional locations was even (

Table 5).

*Table 5. Location of survey respondents. Source: WISA 2021 Survey.*

Location	No respondents	Percentage
Victoria	75	15%
New South Wales	77	15%
Tasmania	70	14%
Western Australia	71	14%
Northern Territory	35	7%
ACT	17	3%
Queensland	56	11%
South Australia	99	19%
Other (e.g. multiple)	9	2%
Metropolitan	243	48%
Regional	266	52%

### Industry experience

We asked respondents how long they had been working in or with the seafood industry. The largest cohort of respondents had been working in the industry for more than 15 years (women = 39% of female respondents; men = 62% of male respondents) (Table 6).

*Table 6. Years working in or with the seafood industry. Source: WISA 2021 Survey.*

Years in industry	Women	Men
0-2 years	16% (n=64)	6% (n=6)
3-5 years	16% (n=64)	10% (n=11)
6-10 years	16% (n=66)	12% (n=13)
11-15 years	13% (n=51)	9% (n=10)
More than 15 years	39% (n=158)	62% (n=66)

### Sectors

For analysis, we collapsed specific subsectors of the industry into five main sector categories (fishing, aquaculture, post-harvest, government and services). Respondents were evenly represented across each of the five main sectors of the industry (Table 7).

*Table 7. Number of respondents from each sector and sub-sector of the seafood industry. Source: WISA 2021 Survey.*

Sector	Specific sector	Women (n)	Men (n)	Total %
Fishing		69	29	19%
Aquaculture		94	13	21%
Post-harvest		73	23	19%
	Seafood processing	21	5	
	Seafood wholesale	24	14	
	Seafood retailing	20	3	
	Postharvest multiple or undefined	8	1	
Government		70	22	18%
Service Sector		88	14	20%
	Industry representative associations	24	5	
	Consulting services (e.g. research, technical, development)	15	6	
	University	31	1	
	NGO	6	2	
	Research organisation - Other	5		
	Education and training	5		
	Services sector - Other	2		
Other		9	5	3%

## Role

Respondents were also asked about their role in their sector. A series of options plus an opportunity to describe their role were provided in the survey. These responses were then categorised using the 2016 ABS Census dictionary. It is important to note that survey participation was skewed towards an over representation of respondents who were in managerial or professional roles (Table 8). Given the survey was online (and despite making it suitable for working on mobile phones, and developing a flyer for workplaces), we expected we would be more likely to get respondents from those who are more regularly at their computer, and in higher levels in organisations. 72% of survey respondents were either 'Managers' or 'Professionals', compared to 32% identifying as Managers/Professionals in the 2016 ABS Census. 'Clerical and administrative workers', 'Sales workers' and 'Labourers' were under-represented in the survey.

Table 8. Role of survey respondents including comparison to 2016 ABS Census population and data on seafood industry sectors. Source: WISA 2021 Survey.

Role*	Women (n & %)	Men (n)	Total %	ABS total %	ABS women %
<b>Managers</b> e.g. CEO, general and specialist managers, business owners	133 (33%)	64	39%	23%	17%
<b>Professionals</b> e.g. accountants, HR, marketing, scientists and researchers, IT	138 (34%)	29	33%	9%	5%
<b>Clerical and administrative workers</b> e.g. office managers, secretaries, receptionists, bookkeepers	72 (18%)	3	15%	9%	32%
<b>Other**</b>	60 (15%)	10	13%		
<b>Technicians and trades</b> e.g. aquaculture technicians, electricians and mechanics, boat builders	18 (4%)	3	4%	7%	4%
<b>Community &amp; Personal service workers</b> e.g. hospitality workers, compliance officers	15 (4%)	1	3%	1%	1%
<b>Sales workers</b> e.g. sales reps and agents, sales assistants	7 (2%)	0	1%	4%	7%
<b>Machinery operators and drivers</b>	1 (0.2%)	0	0.2%	5%	1%
<b>Labourers</b> e.g. Commercial cleaners, factory process workers, aquaculture farm workers, deckhands	19 (5%)	6	5%	41%	33%

\*Roles were categorised using the 2016 ABS Census dictionary

<https://www.abs.gov.au/ausstats/abs@.nsf/Lookup/2901.0Main%20Features12016>

\*\* For analysis of the surveys, Technicians and trades, Community and personal service workers, Sales workers, Machinery operators and drivers, and Labourers were aggregated into a category 'Other'

## Organisation characteristics

The majority of respondents worked in an organisation that employed more than 20 people (55%). 20% of respondents worked in an organisation between 5-20 people and 20% worked with less than 5 people. 5% of respondents were owner/operators of businesses. Of note is that in fishing businesses, most organisations had less than 5 people (53%); and in the service sector 15% of respondents worked on their own. Unsurprisingly, in government organisations, almost all employed more than 20 people (Table 9).

Most of the respondents (54%) worked for an employer full time and 26% owned or co-owned their business. It is noteworthy that there were few male respondents who worked part time for an employer and none that were contributing but unpaid family workers, compared to women respondents (Table 10).

In fishing and postharvest businesses, the majority of respondents were working in 'family businesses' (fishing = 73%, postharvest = 56%), where multiple members of the family work in the

business and have majority control or ownership. In comparison, 38% of respondents worked in family aquaculture business and 9% in service sector family businesses.

*Table 9. Size of organisation by sector respondent. Source: WISA 2021 Survey.*

Sector	Owner/operator*	<5 people	5-20 people	>20 people	Total n
Fishing	8% (n=8)	53% (n=52)	26% (n=25)	13% (n=13)	98
Aquaculture	1% (n=1)	15% (n=16)	19% (n=20)	65% (n=70)	107
Postharvest	2% (n=2)	11% (n=11)	27% (n=26)	59% (n=57)	96
Government			3% (n=3)	97% (n=89)	92
Service sector	15% (n=15)	21% (n=21)	22% (n=22)	43% (n=44)	102
Other	1	2	5	6	14

\* For analysis owner/operator and <5 people were aggregated

*Table 10. Respondent's status in the organisation in which they worked. Source: WISA 2021 Survey.*

Status in organisation	Women (n)	Men (n)	Total %
I own/co-own my business	94	36	26%
I work for an employer full time	214	61	54%
I work for an employer part time	39	3	8%
I work for an employer casually	14	1	3%
I am a contributing family worker - paid	20	2	4%
I am a contributing family worker - unpaid	14		3%
Contractor/Subcontractor	5	1	1%
Volunteer	1	2	0.6%
Student	2		0.4%

### Women's representation in organisations

We asked respondents what percentage of women working in their organisation. The mean response (and variance) for each sector is reported in Table 11. The service sector estimated that there was 51% representation of women, and the government sector had 42% representation of women. In comparison it was estimated women represented 24% in fishing businesses, 28% in aquaculture businesses and 36% in postharvest businesses. While many respondents didn't know if their organisations were typical of their sector, they were more likely to think that other organisations in their sector employed fewer women.

We also asked respondents the gender of their 'boss' in their organisation. The service sector (23%) and fishing sector (20%) had the highest representation of women at the top, with government having only 8% women as 'the boss' of the organisation. In Fishing, Aquaculture and Postharvest sectors there are also equal partnerships (Table 12).

*Table 11. Respondent estimation of representation of women in their organisation and sector.*  
 Source: WISA 2021 Survey.

Mean responses	Fishing	Aquaculture	Postharvest	Government	Service sector
Mean % of women in organisation	24% (SD±20)	28% (SD±17)	36% (SD±22)	42% (SD±14)	51% (SD±29)
Yes, this is a typical % in sector	49%	33%	24%	36%	33%
No, there are more women in other similar businesses/organisations	3%	2%	4%	10%	8%
No, there are less women in other similar businesses/organisations	22%	26%	21%	14%	23%
I don't know	26%	39%	51%	40%	36%

*Table 12. Gender of Boss by sector. Source: WISA 2021 Survey.*

Gender of Boss	Fishing	Aquaculture	Postharvest	Government	Service sector
Female boss	20%	8%	10%	8%	23%
Male boss	57%	78%	75%	90%	67%
Equal partnership (female and male)	11%	6%	9%		
Not applicable	11%	7%	5%	2%	10%
I don't know		2%			1%

### Demographics of female respondents

Women respondents were asked additional demographic questions (Table 13).

The age of respondents differed by sector. In the fishing sector, most of the respondents were 40-59 and 60-79 age brackets, compared to the other sectors, where most women were in the 20-39 and 40-59 age brackets.

Depending on the sector, between 17 to 27% of respondents were born overseas, with the highest rate in the postharvest sector. The country of birth of non-Australian born respondents were varied with no trend. Of note is that 37% of postharvest respondents spoke a language other than English at home. Very few Aboriginal or Torres Strait Islanders responded to the survey.

A large proportion of respondents across sector were highly educated with tertiary diplomas or degrees.

Around half of respondents in all sectors except aquaculture (33%) had caring responsibilities which impacted their work.

Table 13. Demographic information of women respondents - all figures are percentages of total respondents. Source: WISA 2021 Survey.

Demographics	Fishing (%)	Aquaculture (%)	Postharvest (%)	Government (%)	Service sector (%)
<b>Age</b>					
Under 20 years	0	1	1	0	0
20-39 years	17	46	40	53	32
40-59 years	52	46	44	43	58
60-79 years	30	7	15	4	9
<b>Born overseas</b>	<b>17</b>	<b>20</b>	<b>27</b>	<b>21</b>	<b>19</b>
<b>Language spoken other than English at home</b>	<b>10</b>	<b>10</b>	<b>37</b>	<b>10</b>	<b>11</b>
<b>Aboriginal or Torres Strait Islander origin</b>	<b>3</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>0</b>
<b>Highest qualification</b>					
Secondary education ≤ Yr 9	3				
Secondary education ≥ Yr 10	22	14	23	3	2
Certificate	16	12	16	6	6
Diploma or advanced diploma	26	10	16	9	15
Bachelor degree	26	38	30	43	24
Postgraduate degree	7	27	14	40	53
<b>Caring responsibilities impacting work</b>	<b>52</b>	<b>33</b>	<b>49</b>	<b>43</b>	<b>45</b>

## 5. RESULTS

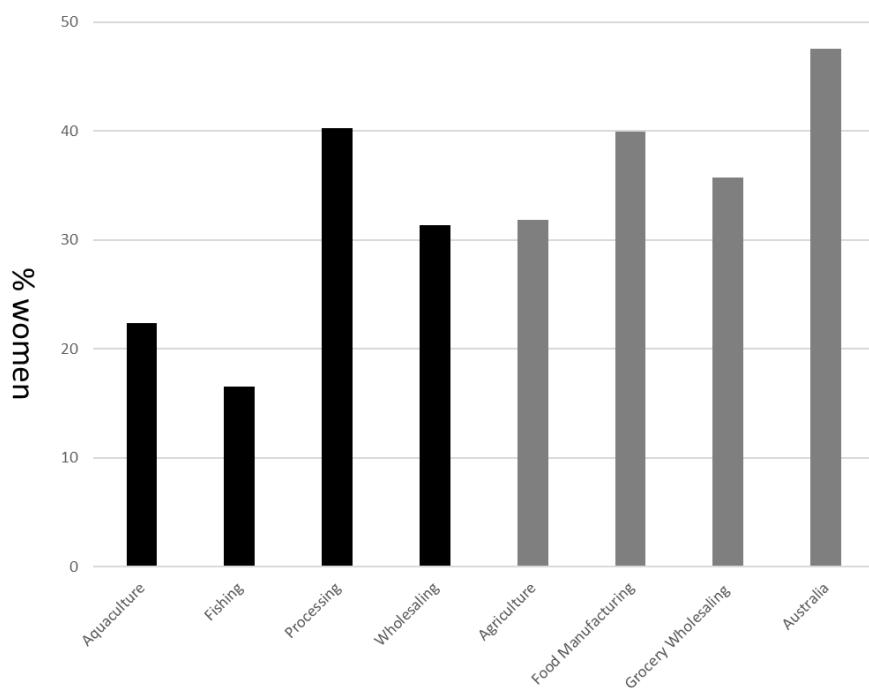
### 5.1. WHAT IS THE CONTRIBUTION OF WOMEN IN THE AUSTRALIAN SEAFOOD INDUSTRY?

#### 5.1.1. Level of participation of women

In 2016, the Australian Bureau of Statistics Census, showed that 24% (n=3072) of the seafood workforce were women (aquaculture, fishing, processing plus wholesaling), in comparison to 48% (n=5,020,012) of the Australian workforce identifying as women (Figure 1).

22% (n=889) of the aquaculture and 17% (n=787) of the fishing workforce were women, lagging behind the comparable 32% (n=72,722) of the agricultural workforce in 2016.

Women's participation in seafood processing (40%, n=619) and wholesaling (31%, n=777), were comparable to food manufacturing (40%, n=66,656) and grocery wholesaling (36%, n=18294) overall in Australia in 2016.



*Figure 1. Percentage of the workforce in 2016 that are women in aquaculture, fishing, processing and wholesale, compared to women in agriculture, food manufacturing, grocery wholesaling and Australia overall. Source: ABS 2016 Census.*

When we look over time, we see that overall, the number of women employed in the seafood industry (across the four sectors) has declined by 20% between 2016 and 2006. The sectors driving the decline are the seafood processing and wholesaling sectors (Figure 2).

Across Australia there has been an 8% increase in women's participation in employment. Looking at comparable sectors, there was a 6% increase in women's participation in Agriculture employment from 2006 to 2016, and a 2% increase in food manufacturing. There was a 23% decrease in women's participation in grocery wholesaling from 2006 to 2016. Only aquaculture appears to be following a similar trends to national and agriculture trends.

In comparing seafood men to women, there has been little change in the total number of men in the industry (1% increase between 2016 and 2006). The greatest declines in men have also been in the processing and wholesaling sectors, suggesting a sector wide contraction. However, in contrast, the number of men has increased by over 40% in both fishing and aquaculture sectors, while the number of women has increased by 5% in aquaculture and decreased by 3% in the fishing sector (Figure 2).

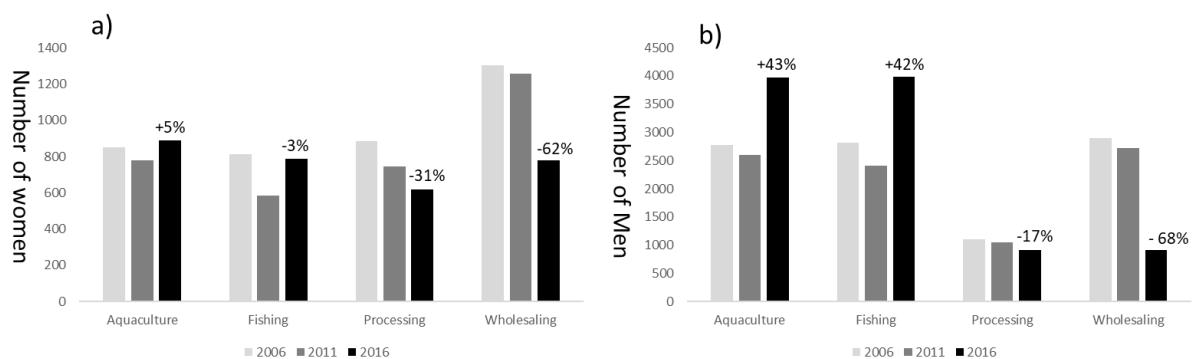


Figure 2. a) Number of women in aquaculture, fishing, processing and wholesaling 2006-2016, compared to b) men in each sector over time. Source: ABS 2016 Census.

The percentage of women is reasonably consistent across each state and territory (21-27%), with a decline across all states and territories over time (Figure 3).

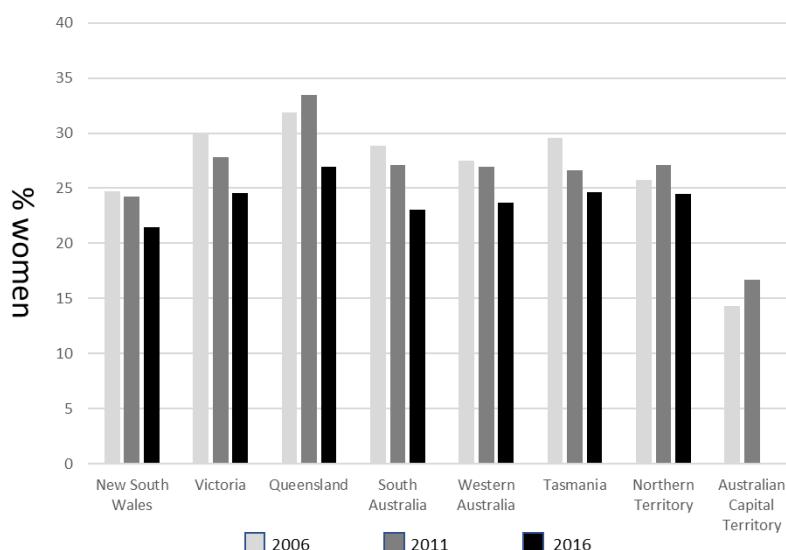


Figure 3. Percentage of women in the seafood industry across State/Territory and from 2006-2016. Source: ABS 2016 Census.

ABS Census data only represents four sectors of the Australian seafood industry (fishing, aquaculture, processing and wholesaling). Interviewees and survey participants were also asked to estimate the percentage of women in their sector (Table 14). Although the primary data collected for this project are course and not representative, clear differences can raise questions.

The WISA 2021 survey results which asked participants to estimate the percentage of women in their organisation were broadly consistent with the ABS data, but there was high variance in responses (Table 14).

For the fishing sector (ABS 2016: 17% women), the mean percentage of women in surveyed organisations was estimated to be 24%, with 22% saying there were less women in other organisations. Participants in the WISA 2021 interviews said that women make up approximately 40% of the fishing sector, however they also said a lot of the work women do in fishing is unpaid and unrecognised. 35% of women surveyed in the fishing sector also said they did not identify as working in the seafood industry as their industry of employment in the 2016 census (Table 15). Therefore, the ABS data estimate may be an underestimate of the percentage of women working in the fishing sector.

In the aquaculture sector, both the surveys and interviewee estimates are broadly consistent with the ABS figures (Table 14). Although, when women were asked in the survey whether they identified as working in the seafood industry in the 2016 Census, almost 20% said they did not (compared to no men) (Table 15). This finding again reinforces a possible underreporting bias for women in this sector in the Census results.

In the processing and wholesaling sector the survey estimates are broadly consistent with the ABS data (Table 14). In contrast, interviewees estimated the percentage of women in the sectors to be much lower than ABS Census data or survey estimates. Also, 19% of survey respondents said that their estimate was likely an overestimate of the proportion of women in their sector (Table 14). 16% of women in the postharvest sector did not identify as working in the seafood industry in the 2016 Census, and 23% didn't know (Table 15).

One key sector in the supply chain that is not explicitly represented in the ABS Census data is seafood retail. It is possible that retail businesses are included in processing and wholesale businesses in the Census data, given that seafood retail businesses can often process and wholesale seafood as well. The interviewee and survey estimates of the percentage of women in retail is 45% and 50% respectively, and it is possible retail businesses may be driving up proportions of women in processing and wholesale in the ABS statistics.

The other key sectors not represented in the ABS Census data are government and the service sectors, and as such, few women said they identified as working in the seafood industry in the Census (Table 15). Estimates from interviewees and survey participants suggest that the government sector is moving closer to equal representation of women in the sector, as a total percentage (Table 14). For the services sector, the findings are more difficult to decipher for the survey responses estimating that there is roughly 50% women participating, but this is highly variable and also likely to be overestimated. Interviewees also gave a variable response.

Table 14. Estimates of the percentage of women workers in each sector from ABS Census 2016 data, interviewee estimates and survey participant estimates. Sources: ABS 2016 Census, WISA 2021 Survey, WISA 2021 Key-informant Interviews.

Sector	Specific sector	ABS Census 2016	Interviewee estimates	Survey participant estimates		
				Own organisation Mean % $\pm$ SD	Typical of sector*	Likely overestimate*
Fishing		17%	40%	24% $\pm$ 20.4 (n=98)	49%	22%
Aquaculture		22%	25%	28% $\pm$ 17.4 (n=107)	33%	22%
Post-harvest				36 $\pm$ 22.0 (n=96)	24%	21%
	<i>Seafood processing</i>	40%	10-50%	37% $\pm$ 23.2 (n=26)	19%	19%
	<i>Seafood wholesale</i>	31%	10-20%	30% $\pm$ 20.0 (n=38)	32%	18%
	<i>Seafood retailing</i>		45-50%	45% $\pm$ 23.6 (n=23)	17%	17%
Government			35-50%	42% $\pm$ 14.0 (n=98)	36%	14%
Service Sector				51 $\pm$ 28.5 (n=102)	33%	23%
	<i>Industry representative associations</i>		10-50%	52% $\pm$ 34.7 (n=29)	24%	24%
	<i>R&amp;D services</i>		10%	55% $\pm$ 25.9 (n=39)	28%	26%
	<i>University</i>		25-50%	45% $\pm$ 17.3 (n=32)	47%	16%

\* Participants were asked if the percentage was typical of other businesses/organisations in their sector. Percentages given in these columns are the percentage of respondents who said the percentage they gave was typical or a likely overestimate ("there are less women in other similar businesses/organisations"). In all sectors the percentage of people who said their estimate was likely an underestimate was 0-10% for each sector. A large proportion of respondents didn't know about how their organisation compared to others, especially in the postharvest sectors.

Table 15. Percentage of surveyed women and men who identified in the ABS 2016 Census as working in the seafood industry or not, for each sector. Sources: WISA 2021 Survey.

Sector	Identified as working in the seafood industry		Did not identify as working in the seafood industry		Didn't know	
	Women	Men	Women	Men	Women	Men
Fishing	58%	79%	35%	10%	7%	10%
Aquaculture	64%	100%	17%	0%	19%	0%
Post-harvest	60%	78%	16%	9%	23%	13%
Government	20%	32%	63%	59%	17%	9%
Service sector	21%	50%	61%	36%	18%	14%

### 5.1.2. Women's roles

#### Women's roles at work

Comparing men and women using ABS Census data, women working in the seafood industry in 2016 represent less than 50% of the workers in each role type across sectors, except for in clerical and administrative roles where 81% of the workers are women (Figure 4).

Women were most likely to be in professional roles in the wholesaling (40%) and processing (29%) sectors.

40% of 'other' workers (mainly labourers) in the processing sector were women.

Women were most likely to be managers in the fishing sector, but still only 25% of managers were women. In processing, 23% of managers were women, in wholesaling, 17% were women, and in aquaculture 16% were women. When we look in more depth into the management roles in the ABS data, women managers tended to be specialist managers, such as HR and training managers or marketing and PR managers. Men dominate the CEO and executive manager positions, holding 85% of these roles across the seafood industry.

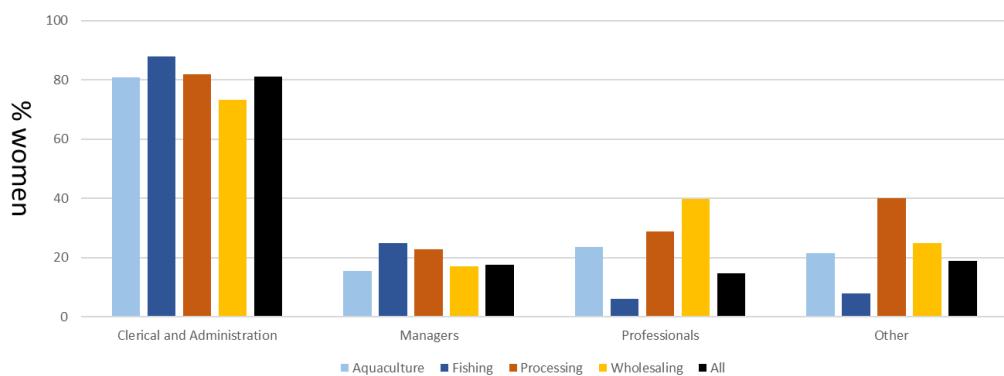
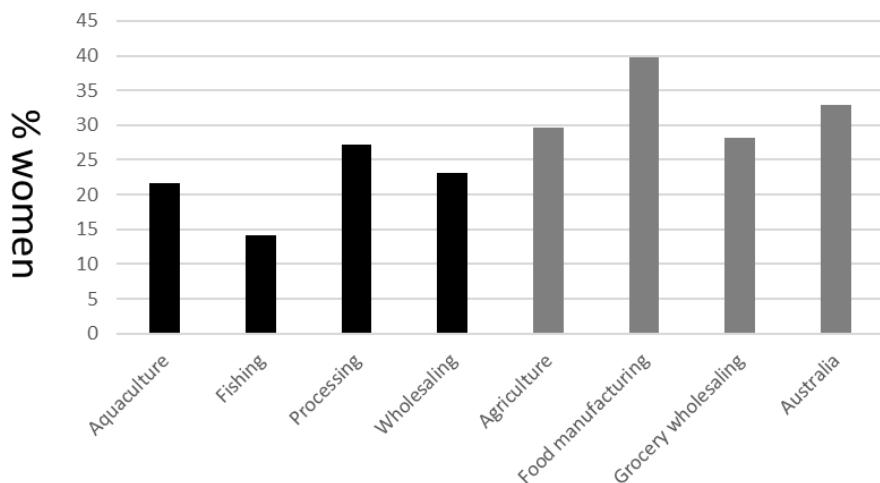


Figure 4. Percentage of women in each role (ABS 2016). Note 'Other' includes labourers, sales workers, machinery operators and drivers and technicians and trades. Source: ABS 2016 Census.

Women in seafood sectors are less likely to be business owner managers of a seafood business, compared to men, and compared to other comparable industries. For example, 14% of women in fishing and 22% of women in aquaculture are business owner managers, compared to 30% of women in agriculture businesses. 27% of women in processing are owner managers, compared to 40% in food manufacturing overall. 23% of women in seafood wholesaling are owner managers, compared to 28% in grocery wholesaling overall (Figure 5).



*Figure 5. Percentage of women who are business owner managers in seafood sectors and comparable industries. Source: ABS 2016 Census.*

When we look at roles women hold in each sector as a proportion of women workers using ABS 2016 census data, we see that in aquaculture most women (42%) work in ‘other’ roles (mostly as labourers). In fishing most women (49%) work in clerical and administrative roles. In comparison, in agriculture, 52% of women are managers (Table 16).

In depth interview results support the ABS Census data findings, with interviewees saying that most of the women working in the fishing sector “do the book work”, the tasks on shore “and things that need to be done during work hours” while mostly it is the men who fish. A proportion of women do often go to sea with their husbands before they have children and home responsibilities increase. Interviewees also spoke about how “traditionally, women don’t do the ‘hands on’ work because it is not women’s work, like in other trades” and that “getting into those jobs is still very hard [as a woman]”. Interviewees also spoke of how women in fishing businesses are not recognised for the work they do:

*“Women are unsung heroes. I know the women in the industry and I've been in it for so long. I know the wives and I chat with them and I know their family businesses wouldn't be what they are without the women”*

With regards to the aquaculture sector, interviewees said women are mostly likely to occupy administrative roles, which is in contrast to ABS 2016 Census data. However, there are increasing numbers of women in technical roles particularly in the hatcheries and there are significant numbers of women in aquaculture businesses that process and package seafood.

In seafood processing, the ABS 2016 Census data indicates that most women (69%) work in ‘other’ roles (mostly as labourers), which is comparable to food manufacturing more generally.

Interviewees, however, predominantly indicated that most women in processing are occupy clerical and administrative roles. In contrast, the ABS 2016 Census data showed that 61% of women work in labouring roles. Interviewees said that labouring roles are male dominated. Fish filleting is very male

dominated, but other labour roles such as the “more fiddly work” including oyster shucking, pin boning, calamari cleaning, and packing, as well as amenities cleaning are roles dominated by women. When interviewees were asked why there weren’t more women in processing, the common response was about the physicality of the work:

*“some of the factory work is very labour intensive and the hours are not conducive to women and what they need”*

*“Filletting is a physical job. I can’t see women sitting there and filleting. Maybe some women like that sort of work, but I don’t know”*

In seafood wholesaling, the ABS 2016 Census data indicates that most women (39%) work in clerical and administrative roles or ‘other’ roles (38%) (mostly sales work or labourers), which is comparable to women in grocery wholesaling more generally.

Interviews with women in wholesaling supported the ABS Census data, indicating that most women worked in “traditional roles” in clerical and administrative roles such as office work and customer service. Fish buying and selling is traditionally male dominated and remains so. A number of interviewees said it was very difficult for women in sales roles (except consumer-facing sales work):

*“Women’s roles in fish trading are very much along traditional roles. Soft skills are women, and physical and heavy hitters are male dominated...sales is aggressive and male dominated and it is where the harassment happens”*

*“Men are dominant in the trade of seafood. They always have been. They need to be at the market early in the morning. It’s not attractive. It’s not like it’s lucrative. It’s not appealing to a female”*

*“Women are not at the market. The atmosphere is not good for women, they are not accepted or trusted.”*

*Table 16. Percentage of women in each role in each seafood sector, comparable sectors, and Australia overall. Source: ABS 2016 Census.*

Occupation	Aquaculture (%)	Fishing (%)	Agriculture (%)	Processing (%)	Food manufacturing (%)	Wholesaling (%)	Grocery wholesaling (%)	Australia (%)
Managers	30	12	52	9	11	15	16	30
Professionals	7	6	2	2	6	5	8	4
Clerical and Administrative	20	49	11	18	10	39	35	13
Other	42	31	33	69	70	38	36	49
Technicians and Trades Workers	6	2	3	1	8	1	2	5
Community and Personal Service Workers	1	1	1	1	4	1	2	2
Sales Workers	4	3	1	5	22	15	17	12
Machinery Operators and Drivers	0	1	1	2	2	2	5	2
Labourers	30	25	27	61	36	21	16	30

There are no ABS Census data for women working in other sectors of the seafood industry, including retail, industry representative organisations, government or service sectors. However, we do have some qualitative insights into women's roles in these sectors from interviews.

The seafood retail sector may be captured in ABS Census data in the processing and wholesaling sectors to some extent, as many businesses in the postharvest sector have multiple functions and include processing and manufacturing, wholesaling and retailing seafood. In interviews we were able to ask questions specifically about the retail work environment. Retail falls into two categories, supermarkets and independent retailers. The women we interviewed referred to independent retailers. While interviewees said they felt seafood retailing was a sector made up of 50% women, the division of work was along traditional lines. Women tend to do bookkeeping, customer service and relationship building roles, while men do the purchasing and filleting, and dominate the managerial roles.

Industry representative associations have a number of roles within them, including the executive officer, staff supporting the Executive Officer, Board, and committees. Based on the interview results, it was concluded that the executive officer role is dominated by men, but there are an increasing proportion of women in the role. One interviewee estimated that 30% of executive position in the seafood industry were held by women. The support staff in industry representative organisations was believed to be equally represented by men and women. However, Boards and committees were very male dominated with few women.

In government, there are different roles, including fisheries management and science, compliance and administrative work. With regard to participation in fisheries management and science, interviewees felt there was gender parity in overall participation, while women dominated administrative work and men dominated compliance roles, although there are increasing proportion of women in compliance. In senior roles, it depends on the agency. Some agencies were described by interviewees as having gender parity in senior roles, while other government agencies still have more men in senior roles than women.

In the services sector, the types of organisations vary from consulting businesses to universities. In both cases, interviewees said that men dominate the leadership positions:

*“Women consultants don't get the Chair roles for meetings, for example...women are overlooked and undervalued for jobs, compared to men”*

In universities, while gender parity was reported by interviewees at the PhD, junior and technician level, more senior roles are dominated by men.

### **Women's roles at home**

A possible significant contributor, or barrier, to women progressing in their workplaces in terms of taking on fulltime or more senior roles, is the significant role women have in domestic unpaid labour compared to men. Women do significantly more domestic labour than men in Australia. Using ABS Census data, we compared women and men who work full time in the seafood industry and in Australia overall in 2016 (Figure 6). In the seafood industry population, 60% of men who reported in the Census as working in this industry do less than five hours of domestic labour per week,

compared to 36% of women working full time. 24% women working full time in the seafood industry do more than 15 hours per week, compared to 8% of men.

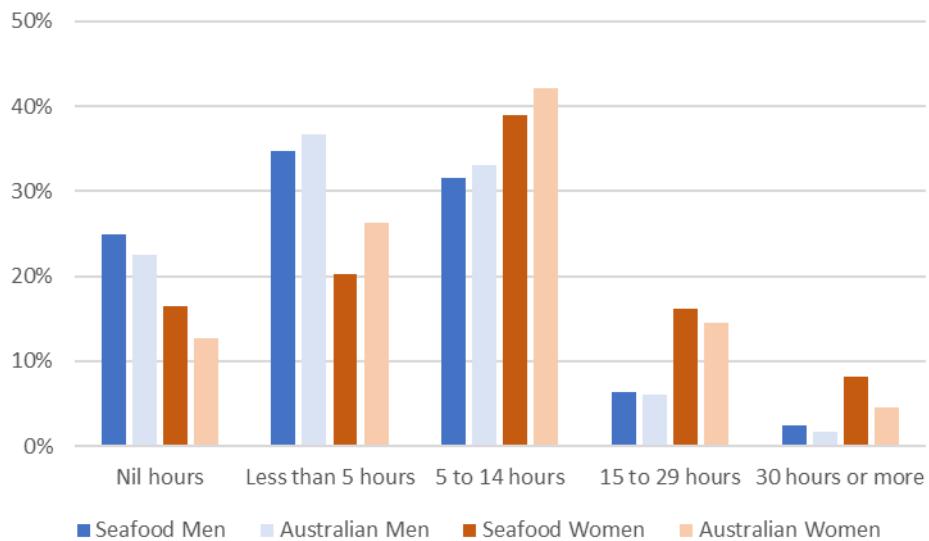


Figure 6. Percentage of full time women and men in the seafood industry and in Australia doing unpaid domestic labour, per week. Source: ABS 2016 Census.

## 5.2. WHO ARE THE WOMEN IN THE AUSTRALIAN SEAFOOD INDUSTRY?

### Age trends of women in the seafood industry

According to the ABS 2016 Census, the median age of women in the seafood industry in 2016 was 43 in aquaculture, 51 in fishing, 46 in processing and 44 in the wholesale sector. In all sectors except wholesale, the median age of men was lower than women. In all sectors, except aquaculture, the trend appears to be that there is an aging workforce among women (Figure 7).

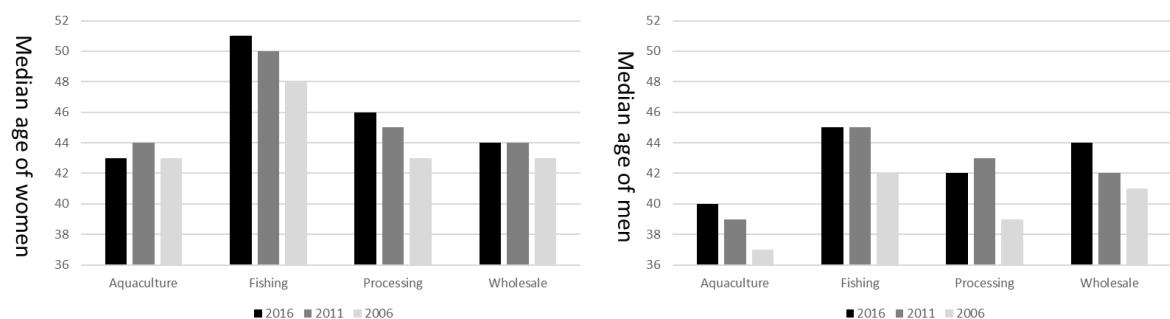


Figure 7. Median age of women and men in each sector from 2006 – 2016. Source: ABS 2016 Census.

## Level of education of women in the seafood industry

2016 ABS Census data shows that women working in the seafood industry have a higher level of education (46% have higher education) than men (30% have higher education). This trend is consistent across all four sectors (Table 17).

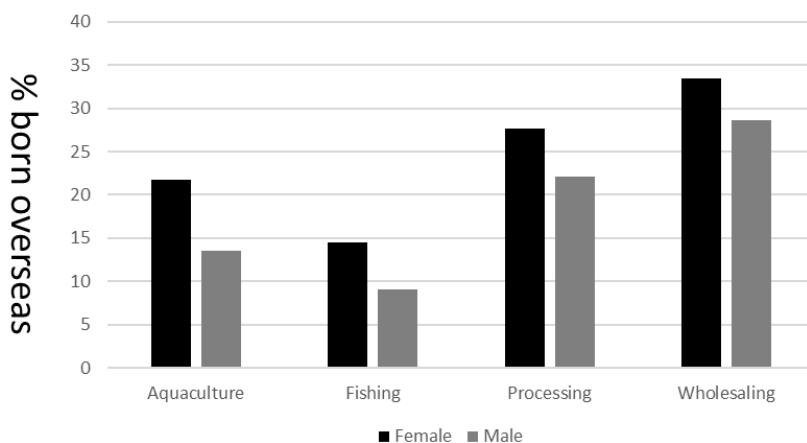
56% of women in aquaculture, 56% of women in wholesaling, 35% of women in fishing and 28% of women in processing have an education level higher than secondary school.

*Table 17. Percentage of highest level of education for women (W) and men (M) for each seafood sector. Source: ABS 2016 Census.*

Highest level of education	Aquaculture (%)		Fishing (%)		Processing (%)		Wholesaling (%)	
	W	M	W	M	W	M	W	M
Higher education (Bachelor degree, Graduate diploma/certificate, Postgraduate degree)	26	18	13	5	12	11	23	16
Higher education (Diploma, Advanced diploma, Certificate III & IV)	34	26	22	11	17	16	34	23
Secondary Yr 10 and above	39	36	52	35	56	50	42	48
Secondary Yr 9 and below	4	5	7	9	9	8	8	7

## Ethnicity of women working in the seafood industry

In 2016, the ABS Census data revealed that there are more women than men born overseas in aquaculture, fishing, processing and wholesale. The wholesale sector has the greatest proportion of women born overseas (33%) (Figure 8).



*Figure 8. Percentage of women and men born overseas in aquaculture, fishing, processing and wholesale. Source: ABS 2016 Census.*

In 2016, the aquaculture and fishing sectors, most women and men who were born overseas were from Northwest Europe (Figure 9). The lack of ethnic diversity in both aquaculture and fishing was also mentioned in in-depth interviews, with both sectors being referred to as “white Australian” and “old school Australian” men, despite the diversity of the broader population.

In the processing sector, most women who were born overseas were from Southeast Asia (42%) and Northeast Asia (21%). While this was also true of men in processing, there was also greater proportions of men from Oceania, Southern and Central Asia and Southern and Eastern Europe.

Interviewees also spoke of the relatively high ethnic diversity of women in the processing sector, particularly working in the labour sector:

*"The majority of the women working on the processing floor are migrants. Vietnamese, Nepalese, women from southeast Asia, as well as Samoan. Most of our factory women have been international students. They work hard. It has been common for migrant women to work in processing for a long time. They don't need good language skills. But also there is a trend that the work is too hard for the Aussies – they don't want to work in the cold, or early. Whereas migrant [women] are grateful for the work. Our employees stay for a long time."*

In wholesale, most women who were born overseas were from Northeast Asia (38%) and Southeast Asia (36%). While this was also true of men in wholesaling, like processing, men's region of origin was more spread, with greater proportions of men from Oceania, Southern and Eastern Europe, and Southern and Central Asia.

Interviewees also spoke of the large proportion of Vietnamese and Chinese seafood businesses who wholesale and retail seafood, and the women that are seen on the market floor tend to be Southeast Asian.

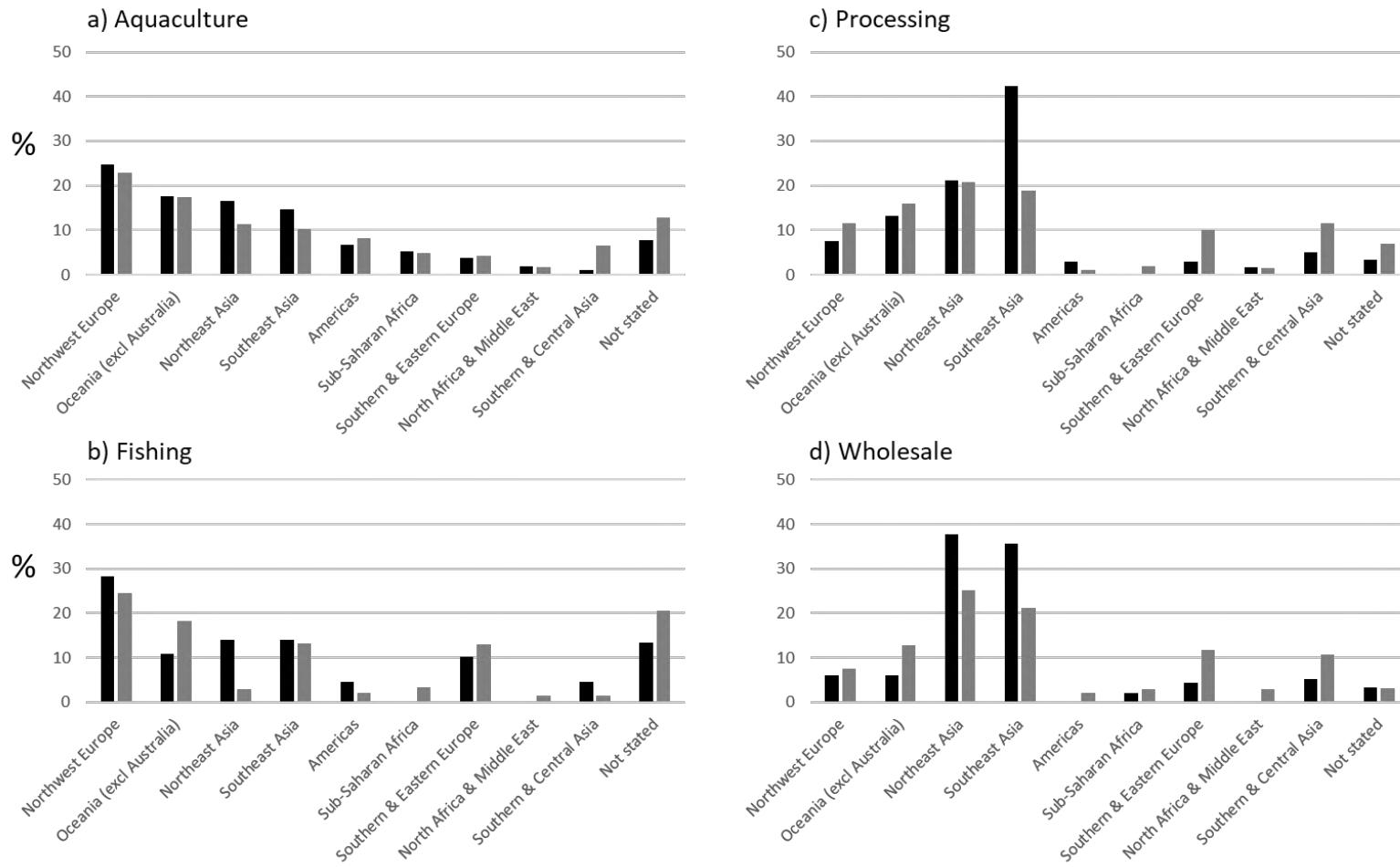


Figure 9. Percentage of women (black colour) and men (grey colour) born in overseas regions for a) aquaculture, b) fishing, c) processing, and d) wholesale. Source: ABS 2016 Census.

2016 ABS Census data show there are proportionally more Aboriginal and Torres Strait Islander men in the seafood industry than women across all sectors, with aquaculture representing the greatest proportion of Aboriginal and Torres Strait Islander men (5%) and women (4%) in the sector (Figure 10). Processing representing the second greatest proportion of Aboriginal and Torres Strait Islander men (4%) and women (3%) in the sector. All of the Aboriginal and Torres Strait Islander women identified as working in the seafood industry in Australia were from Tasmania and New South Wales, with none counted in the other states and territories.

Across all sectors in the Australian workforce in 2016, 1.7% were Aboriginal and Torres Strait Islander women and 1.8% were men.

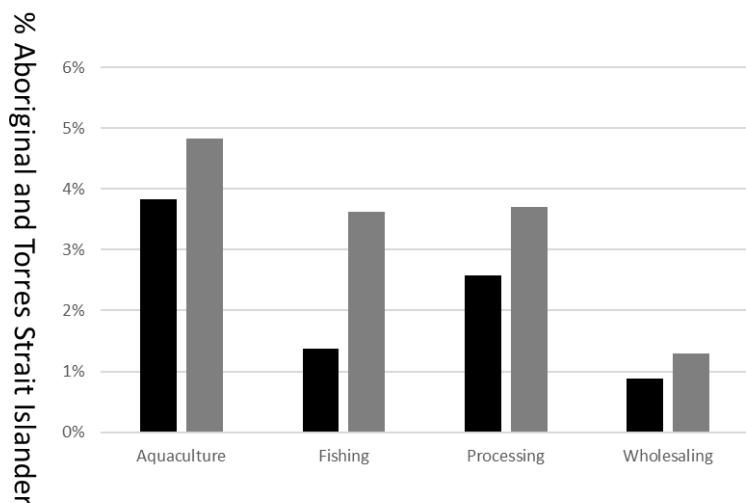


Figure 10. Percentage of seafood industry women (black colour) and men (grey colour) who are Aboriginal or Torres Strait Islander. Source: ABS 2016 Census.

## 5.3. WHAT WOMEN NEED TO HAVE A CAREER AND SUCCEED IN THE AUSTRALIAN SEAFOOD INDUSTRY?

### 5.3.1. Having job security

#### The gender pay gap

The gender pay gap was calculated<sup>1</sup> using ABS 2016 Census data for full time male and female workers in the different sectors and occupations. Compared to the gender pay for the overall Australian workforce in 2016 (14%), the processing sector had the widest pay gap at 18%. The

<sup>1</sup> The pay gap was calculated using:

(avg weekly income men) – (avg weekly income women)/avg weekly income men

ABS 2016 Census data uses income categories and the mid-point was taken from these for calculations

largest pay gap by occupation in the seafood industry sectors was for women in professional roles and in labouring roles (Table 18).

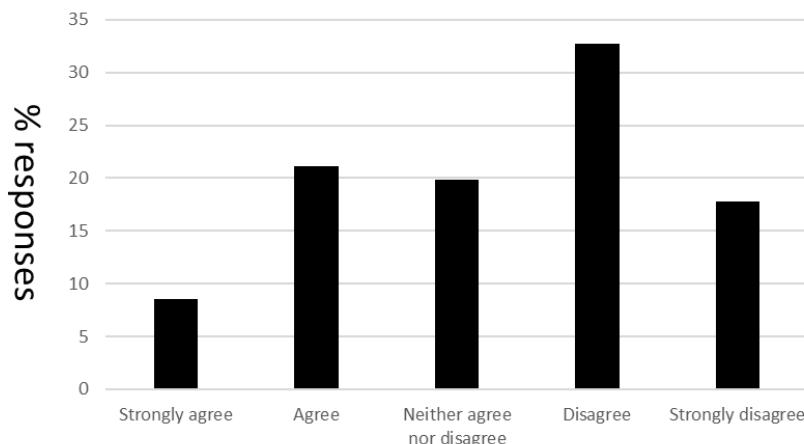
*Table 18. Gender pay gap (extent to which mens' average weekly income is higher than womens', expressed as percentage) in the seafood industry sectors and occupations compared to Australia. ABS 2016 Census.*

Sector	Pay gap* (%)	Occupation (%)	Pay gap (%)	
			Seafood industry	Australian workforce
Aquaculture	13	Managers	11	13
Fishing	10	Professionals	25	17
Processing	18	Administration & Clerical	14	20
Wholesale	13	'Other' (technicians & trades, community service, sales, machinery operators and labourers)	24	24
All Seafood	15			
Australia	14	Labourers	27	22

\*The pay gap was calculated using: (avg weekly income men) – (avg weekly income women)/avg weekly income men. ABS 2016 Census data uses income categories and the mid-point was taken from these for calculations

### Job security

30% of women surveyed in the 2022 WISA survey worried about job security, while 51% did not. 21% neither agreed or disagreed (Figure 11).



*Figure 11. Percentage of women's responses to the question "I worry about job security". Source: WISA 2021 Survey.*

Cohorts of surveyed women whose level of agreement that were worried about job security was higher (more than 10% higher than the overall levels<sup>2</sup>) included: women working in the service sector. Cohorts of surveyed women whose level of agreement was lower (they disagreed by more than 10% than overall levels) included: women working the government sector or who had been working in the industry for 0-2 years (Table 19). See [Appendix 4](#) for full results by variable.

<sup>2</sup> Note that the 10% does not represent a significant difference. Sample sizes in some cohorts are small (ranging between n=33 and n=277). This analysis of cohorts is presented to note differences compared to the overall result.

Table 19. Key findings of women's responses to "I worry about job security". Source: WISA 2021 Survey.

Variable	Key findings
Overall	30% of women surveyed worried about job security 51% did not worry about job security 21% neither agreed or disagreed
Sector	46% of women working in the service sector worried about job security 61% of women working in the government sector did not worry about job security
Time in industry	63% of women who had worked in the industry for 0-2 years did not worry about job security

A reason for which women in the service sector were most likely to feel job insecure was identified in the interviews; that a lot of the work in this sector (industry associations, consultants, university researchers) is fixed term contract work.

Interviewees who had experience of contract work suggested that fixed term contract work does have a differential impact for women than men.

*"Women don't necessarily want to become consultants because the work is insecure. Men don't seem to worry about consultancy being insecure"*

In particular, when a sector is characterized by contract work, taking time out or reducing hours to have a family or undertake caring responsibilities can have an impact. It can be difficult to get back into work again or progress.

*"Taking time out to have a family creates job insecurity. It's difficult to get back into work and the work itself is less rewarding"*

*"I didn't take maternity leave, instead I kept working because I was so afraid I wouldn't be able to get back into the workforce. But at the same time my reduced hours because of the children meant I was less productive and the actual work was more 'fill in roles'*

*"If a project comes to an end, and you are pregnant, you are not there to be able to take the next project. You don't have uninterrupted work history"*

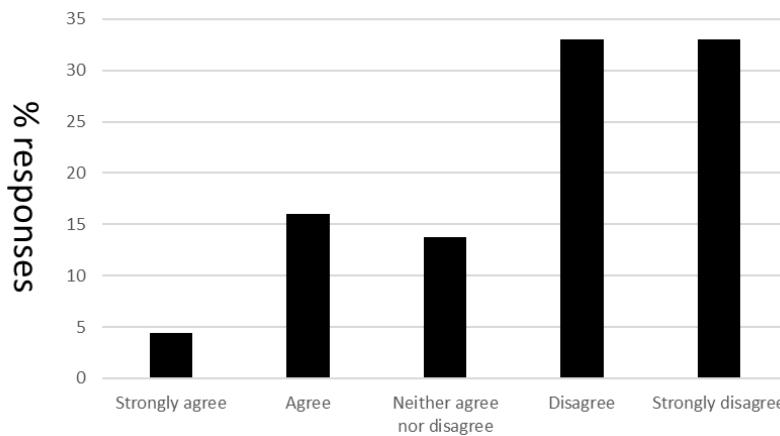
*"There is a lot of contract work and if you don't meet the metrics, which aren't defined, then your contract won't get renewed"*

It is important to note that participation levels in the survey was high by women that were more likely to be in secure jobs, such as managers and professionals. However, a lot of the work in the industry is casualized and given we did not achieve high levels of participation by these women in the survey, it is not possible to have a full clear picture of women's level of job security. We raise this here because in the interview results we found contrasting views about women and casual work. On one hand, some interviewees reported that women want job security, and so are excluded from workplaces where casual positions are the norm. Since COVID19, some postharvest businesses reduced casual positions and created more permanent positions with the benefit of attracting more women. On the other hand, other interviewees indicated that women are attracted to casual work because it is flexible, and that in the same move toward creating permanent positions during COVID19, there was resistance by women to changing over to permanent jobs.

### 5.3.2. Freedom from sexual harassment

#### Prevalence of sexual harassment

One in five women in the seafood industry surveyed by WISA in 2021 said there was sexual harassment in their workplace or work environment (Figure 12). 66% of women disagreed or strongly disagreed that there was sexual harassment in their workplace or work environment. 14% neither agreed or disagreed.



*Figure 12. Percentage of women's responses to "There is sexual harassment of women at my workplace or in my work environment e.g. unwelcome comments, jokes, pictures, staring, physical contact, sexual requests, intrusive questions". Source: WISA 2021 survey.*

Around half of the women who we interviewed in-depth talked about the prevalence and their experiences of sexual harassment in the industry, from being told to use femininity to get outcomes at work to receiving unwanted, vulgar and inappropriate comments, 'jokes' and innuendos. In all cases, the women interviewed had felt that they had to anticipate sexual harassment and men's reactions/behaviour in their workplace and then be the ones to develop personal strategies to mitigate it so that it didn't impact their careers.

Interviewees experiences of sexual harassment are best illustrated with quotes:

*"The people who you work with and deal with can be completely inappropriate and vulgar. It's beyond a joke. I'm lucky I have a door to my office so I can shut it if it is too much"*

*"How do we get the cultural change needed when the older generation of men feel it is totally acceptable to comment on your body or appearance?"*

*"The innuendos and photos at [my workplace] is very blokey behaviour and the boys club allows it. It's difficult to call it out as a woman when no one listens to you"*

*"You definitely feel like you are a woman in the industry, when men flirt with you and stuff... It's a big boys club and if you say something no one is going to believe you... and the men are often way more established than you, so you have to think about this and be strategic, and understand that it can affect your career"*

*“I am very careful not to socialise with men in the industry, especially in the evening, because then rumours start about you...but you can't talk about this out loud, you as a woman have to mitigate”*

*“I was told by [the board], before going to see a MP, to put make up on and bat my eyelids to get what we wanted.”*

The cohorts of women (participating in the WISA 2021 survey) whose level of agreement with the statement “There is sexual harassment of women at my workplace or in my work environment” was higher (more than 10% higher than the overall levels) included: women working in the government sector, working in professional roles, in clerical and administrative roles, and whose boss was a woman. Cohorts of surveyed women whose level of agreement was lower (they disagreed by more than 10% than overall levels) included: women working in organisations of 5-20 people (Table 20) See [Appendix 4](#) for full results by variable.

*Table 20. Key findings of women's responses to “There is sexual harassment of women at my workplace or in my work environment”. Source: WISA 2021 Survey.*

Variable	Key findings
Overall	20% of women agreed there was sexual harassment in their workplace or work environment 66% of women disagreed 14% neither agreed or disagreed
Sector	30% of women who worked in the Government sector agreed there was sexual harassment in their workplace or work environment
Role	34% of women who worked in professional roles agreed there was sexual harassment in their workplace or work environment 34% of women who worked in clerical and administrative roles agreed there was sexual harassment in their workplace or work environment
Organisation size	79% of women who worked in organisations with 5-20 people disagreed that there was sexual harassment in their workplace or work environment
Gender of boss	32% of women who worked for a female boss agreed there was sexual harassment in their workplace or work environment

### Workplaces addressing sexual harassment

Women were asked whether disrespectful behaviour was addressed in the WISA 2021 survey. 62% of women agreed or strongly agreed that disrespectful behaviour was quickly addressed (Figure 13). However, 18% disagreed or strongly disagreed and 20% said they neither agreed or disagreed.

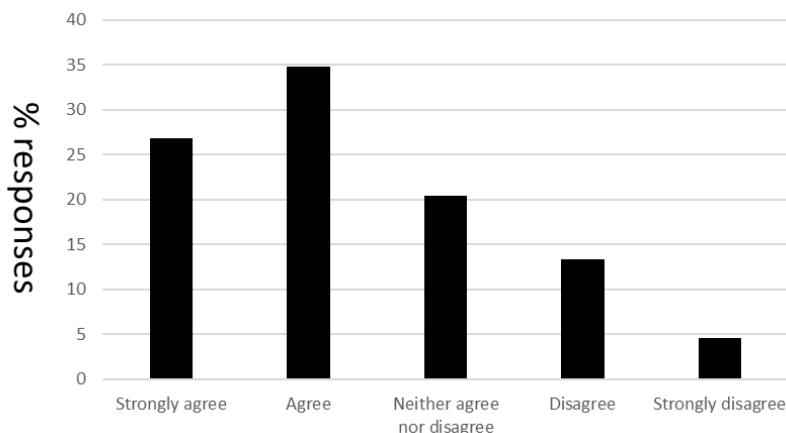


Figure 13. Percentage of women's responses to "disrespectful behaviour is quickly addressed at my workplace or in my work environment". Source: WISA 2021 Survey.

Cohorts of surveyed women who agreed that disrespectful behaviour was addressed quickly in their workplace was higher (more than 10% higher than the overall levels) included: women working in the postharvest sector and in organisations with 5-20 people. There were no cohorts of women who disagreed by more than 10% than overall levels (Table 21, [Appendix 4](#)).

Table 21. Key findings of women's responses to "Disrespectful behaviour is quickly address at my workplace or in my work environment". Source: WISA 2021 Survey.

Variable	Key findings
Overall	62% of women agreed that disrespectful behaviour was quickly addressed in their workplace or work environment 18% disagreed 20% neither agreed or disagreed
Sector	73% of women who worked in the postharvest sector agreed that respectful behaviour was quickly addressed in their workplace or work environment
Organisation size	78% of women who worked in organisations with 5-20 employees agreed that disrespectful behaviour was quickly addressed in their workplace or work environment

Some interviewees spoke of the lack of organisational support to address sexual harassment specifically. In many situations there is nowhere for women to go to report sexual harassment or do something about it. The fact that many businesses and organisations are small makes it difficult to get the structures in place to support women who experience sexual harassment:

*"I had an experience of sexual harassment which was bad enough to make a complaint. But I had nowhere to complain to and felt ashamed and embarrassed. How do other women make complaints? I ended up going to a counsellor who taught me how to respond. Part of it is learning in advance how to respond, empowering and preparing yourself. Training would be good. Building capacity within the industry, not just for women, to call it out. How can we support workplaces to become better?"*

Even in larger organisations, the structures to report, effectively respond, and change the culture in organisations can be lacking, without leaders taking the challenge on:

*"I was doing a job that was difficult and stressful, and I felt that it was really unfair that I had to come to work, already what I had to do for my job was all I could cope with, but because I was a woman I had this added layer of stress because I had to field comments from the men that were inappropriate. It was something that the men didn't have to deal with. It was just really frustrating....then they did a survey of employees which included questions on culture, including bullying and harassment. The results were woeful and there were serious cultural issues. The new boss made significant changes in response and made it clear to those that were responsible that this behaviour would not be tolerated. When it came from the senior management, it had more impact than me calling it out."*

### 5.3.3. Being respected, valued and included

#### Being respected

The Oxford Dictionary defines respect as “admiring (someone or something) deeply, as a result of their abilities, qualities, or achievements”. In the 2021 WISA survey, we asked women to agree or disagree with the statement: *“Compared to men, I am not taken seriously when I offer an opinion or make a suggestion at work”*. 27% of women who were surveyed agreed or strongly agreed that they were not taken seriously when they offered an opinion or made a suggestion at work, compared to men. 52% of women disagreed or strongly disagreed. 20% neither agreed or disagreed (Figure 14).

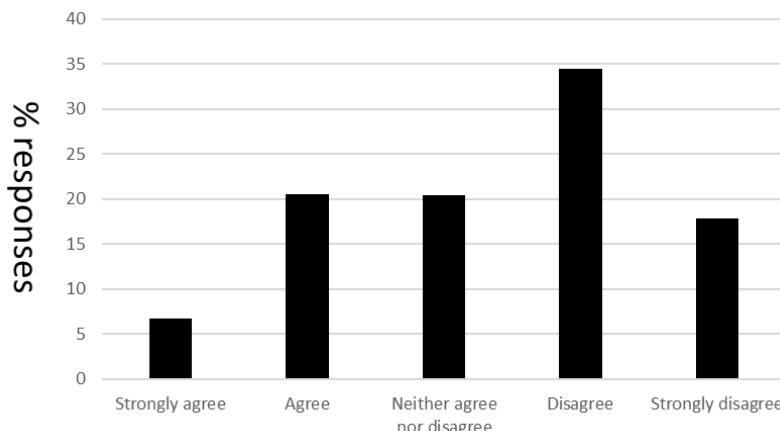


Figure 14. Percentage of women's responses to *"Compared to men, I am not taken seriously when I offer an opinion or make a suggestion at work"*. Source: WISA 2021 Survey.

In-depth interviews revealed that every woman's experience is different and that experiences vary depending on sector, organisation and individual. However, the majority of women we interviewed felt that at points in their career they weren't taken seriously in the industry because of their gender. Almost all women used the words, *"I wasn't taken seriously"*. Examples ranged from stories of board room incidents where women were dismissed and spoken down to, to struggling to be listened to on substantive organisation and business matters, to being ignored or not heard in favour of male counterparts.

*"It doesn't anger me, but more amuses me...in some forums, you put a suggestion forward and the stereotypical thing happens where then a man will put your suggestion forward in a slightly different way and it will get the traction but when you said it, it doesn't... I think if you*

*focus on it, it would do your head in. If I did focus on it, it would make my job a lot less enjoyable and I think I would get frustrated and it would drag me down."*

*"You are in a meeting, you have a dozen people sitting around a table, and one of the blokes turns around to one of the women and says, 'now you are taking notes on this aren't you?' It just epitomises the attitude. It just says, we, the men, are strategizing and thinking, and you, the women, are not capable to do that. I thought I was here [in my position] for my opinions. It is the classic thing I see all the time [in the seafood industry]. It's just unheard of in this day and age really [in other industries]"*

*"I'm not taken seriously by male industry members because of being a woman, especially when I give news they didn't want to hear. Being a woman is just another thing to put against us to discredit us. It doesn't happen all the time and isn't representative of my experience, but it does happen."*

*"Men who seek investment are taken more seriously, including men who don't have the same high levels of scientific and industry knowledge [as myself]."*

On the other hand, some women who we interviewed were adamant that they had never felt any gendered disrespect or it varied with the sector they worked in. Women said:

*"[Industry men are] inherently gentlemen and very respectful"*

*"I spoke to women [in my sector] in preparation for this interview who have said they feel they are discriminated against in terms of entering the industry/progressing because of their gender. But when I asked the questions to drill down into why, I can't find any 'gendered differences'. It didn't come down to gender, it was that they [the women] just didn't know how to approach [getting what they wanted]...whether women feel more inhibited than men, I don't know. But when I drilled down, I haven't had anyone be able to tell me what the gender issue is"*

*"Often I am in meetings and am only woman there. This can be advantageous because it can make them [men] behave better sometimes"*

*"Women's roles in my fishery are really well recognised in comparison to other fisheries. We recognise the importance of women in the industry and also in family life"*

*"With producers, when you are seen to be 'doing stuff', the people in the same sector as you, they understand and respect that"*

Some women interviewed suggested that experience and age may be a confounding issue with gender when it came to how they felt they were treated:

*"I think the issue around getting heard is less about women, but more to do with the younger generation. Small [businesses] can't let their children get involved in networking things because they are needed [in the business]."*

*"I would go out and say excuse me, please and thank you, and here are the products, and they would tell me to fuck off. It was a constant barrier all the time. I don't know if it is because I am a woman, all I know is that it is how I was treated. It might be because I'm young and they think they can get away with it maybe."*

*“In the seafood industry, I often feel dismissed and my opinions are not valued by others in the industry, but whether that is because of lack of experience or because I am a women, I don’t know...”*

The cohorts of women (participating in the WISA 2021 survey) whose level of agreement with the statement “Compared to men, I am not taken seriously when I offer an opinion or make a suggestion at work” was higher (more than 10% higher than the overall levels) included: women who had worked in the industry for 3-5 years or 11-15 years. Cohorts of surveyed women whose level of agreement was lower (they disagreed by more than 10% than overall levels) included: women working in the postharvest sector, in clerical and administrative roles, who had worked in the industry for 0-2 years, or in organisations of 5-20 people (Table 22, [Appendix 4](#)).

*Table 22. Key findings of women's responses to "Compared to men, I am not taken seriously when I offer an opinion or make a suggestion at work"*

Variable	Key findings
Overall	27% of women who were surveyed agreed that they were not taken seriously when they offered an opinion or made a suggestion at work, compared to men. 52% disagreed 20% neither agreed or disagreed
Sector	63% of women working in the postharvest sector disagreed with the statement “Compared to men, I am not taken seriously when I offer an opinion or make a suggestion at work”
Role	64% of women working in the clerical and administrative roles sector disagreed with the statement “Compared to men, I am not taken seriously when I offer an opinion or make a suggestion at work”
Time in industry	43% of women who had worked in the industry for 11-15 years agreed that they weren't taken seriously when they offered an opinion or made a suggestion at work, compared to men. 39% of women who had worked in the industry for 3-5 years agreed 62% of women who had worked in the industry for 0-2 years disagreed
Organisation size	65% of women working in organisations of 5-20 people disagreed with the statement “Compared to men, I am not taken seriously when I offer an opinion or make a suggestion at work”

In the WISA 2021 survey, we asked two questions about whether women were treated with respect. First we asked women only if women were treated with respect in their workplace or sector. Second, we asked both women and men if women were treated with respect in the seafood industry in general.

82% of women who were surveyed agreed or strongly agreed that women were treated with respect at their workplace or in their sector, with only 6% disagreeing or strongly disagreeing. 12% neither agreed or disagreed (Figure 15).

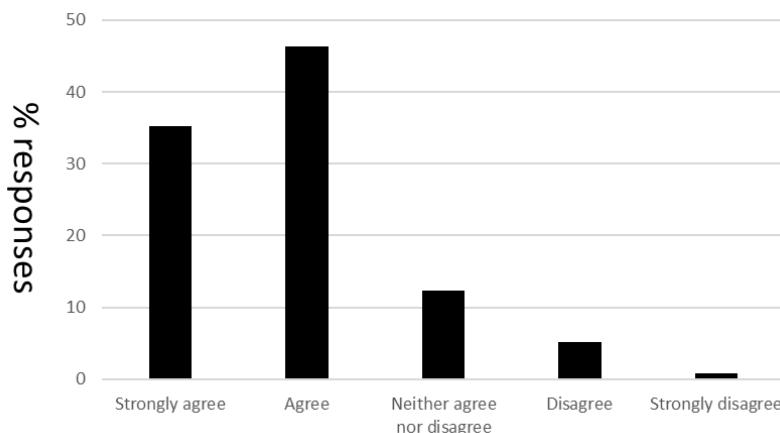


Figure 15. Percentage of women's responses to "Women are treated with respect at my workplace or in my sector". Source: WISA 2021 Survey.

When both men and women were asked about whether women were treated with respect in the Australian seafood industry overall, the findings are not as clearly positive as when women were asked about their workplace. 51% of respondents (men and women) agreed or strongly agreed that women were treated with respect in the industry, with 33% neither agreeing or disagreeing and 16% disagreeing or strongly disagreeing.

Men surveyed were more likely agree that women were treated with respect in the industry (67% agreed or strongly agreed) than women surveyed (47% agreed or strongly agreed). Women surveyed were more likely to disagree with the statement that women were treated with respect in the industry (18% disagreed or strongly disagreed) than men (9% disagreed or strongly disagreed). 36% of women and 24% of men neither agreed or disagreed (Figure 16).

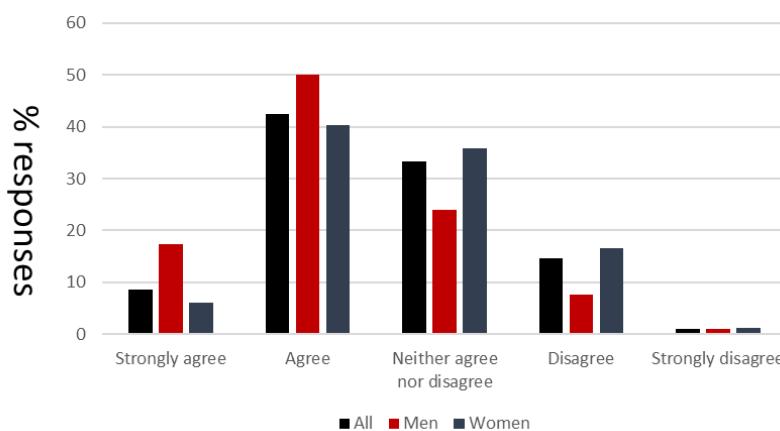


Figure 16. Percentage of women and men's responses to "Women are treated with respect in the Australian seafood industry". Source: WISA 2021 Survey.

There were no cohorts of women (participating in the WISA 2021 survey) whose level of agreement with the statement “Women are treated with respect at my workplace or in my sector”<sup>3</sup> was higher (more than 10% higher than the overall levels). Cohorts of surveyed women whose level of agreement was significantly lower (they disagreed by more than 10% than overall levels) included: women who had worked in the industry for 11-15 years (Table 23, [Appendix 4](#)).

*Table 23. Key finding of women responding to “Women are treated with respect at my workplace or in my sector”. Source: WISA 2021 Survey.*

Variable	Key findings
Overall	82% agreed that women are treated with respect at my workplace or in my sector 6% disagreed 12% neither agreed or disagreed
Time in industry	16% of women who had worked in the industry for 11-15 years disagreed that women were treated with respect in their workplace or sector

### Being valued

27% of women felt like their skills and experience were always or usually undervalued compared to the men in their workplace. 43% said this happened rarely or never (Figure 17), and 30% said this happened sometimes.

When both men and women were asked about whether the contribution of women was valued in the Australian seafood industry overall, the findings appear to be more positive. 51% of respondents (men and women) said that contribution of women is always or usually valued in the industry, with only 16% saying this was rarely or never the case and 33% saying it was sometimes the case. This difference in results when asking about workplace and overall industry is interesting. It may be a reflection of the question design (one question framed as a negative and one as a positive), it may be due to differences in the perceived culture at the workplace and industry, or it may be a reflection of the sample.

Men were much more likely say that the contribution of women was valued (70% always or usually) compared to women (50% always or usually). 8% of women and 5% of men said the women’s contribution was rarely or never valued. 43% of women and 25% men said this was sometimes the case (Figure 18).

<sup>3</sup> We only report the descriptive analysis by cohort of women of survey questions asked to women about their workplace or work environment because we believe these results are more meaningful and reliable as women are reporting on their workplaces where they have expert knowledge. The breakdown of cohorts for all questions are available in Appendix 4.

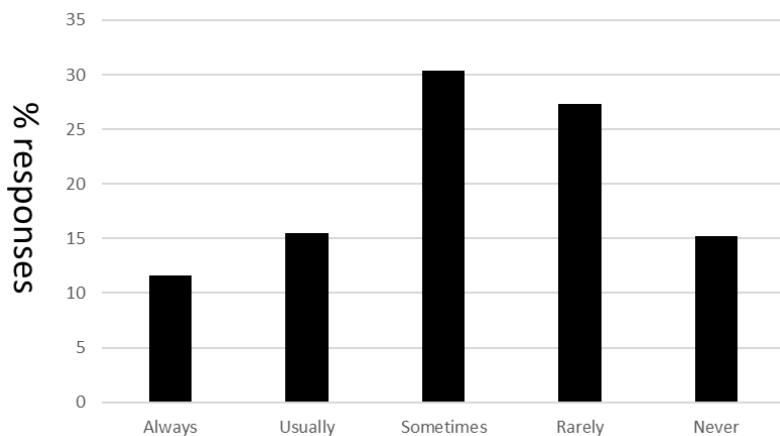


Figure 17. Percentage of women's responses to "I feel like my skills and experience are undervalued compared to the men in my workplace or sector". Source: WISA 2021 Survey.

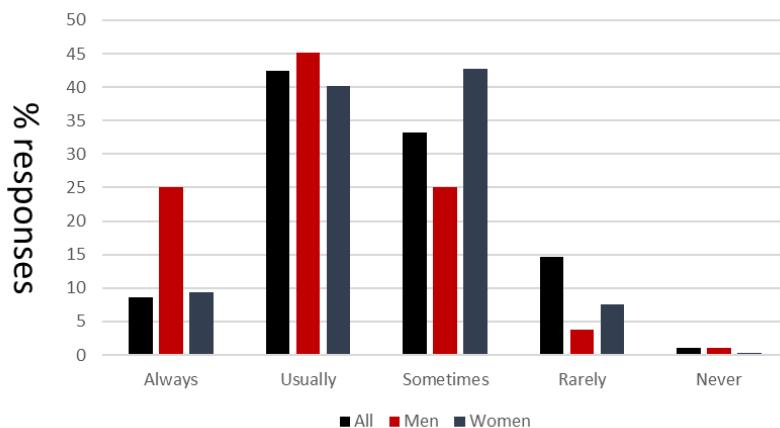


Figure 18. Percentage of women and men's responses to "The contribution of women is valued in the Australian seafood industry". Source: WISA 2021 Survey.

The cohorts of women (participating in the WISA 2021 survey) who said they always or usually "feel like their skills and experience are undervalued compared to men in their workplace or sector" was higher (more than 10% higher than the overall levels) included: women who had worked in the industry for 6-10 years. Cohorts of surveyed women who said they rarely or never feel undervalued compared to men was higher (by more than 10% than overall levels) included: women who had worked in the industry for 0-2 years. Cohorts of surveyed women who said they sometimes undervalued compared to men was higher (by more than 10% than overall levels) included: women working the services sector, and women who had worked in the industry for 11-15 years (Table 24, [Appendix 4](#)).

Table 24. Key findings of women responding to "I feel like my skills and experience are undervalued compared to the men in my workplace or sector" Source: WISA 2021 Survey.

Variable	Key findings
Overall	27% of women always or usually felt like their skills and experience were undervalued compared to the men in their workplace or sector 43% of women said this was rarely or never the case 30% of women said this was sometimes the case
Sector	44% of women working in the services sector sometimes felt like their skills and experience were undervalued compared to the men in their workplace or sector
Time in industry	39% of women who had worked in the industry for 6-10 years always or usually felt like their skills and experience were undervalued compared to the men in their workplace or sector 57% of women who had worked in the industry for 0-2 years said this was rarely or never the case 41% of women who had worked in the industry for 11-15 years said this was sometimes the case

Most women participating in in-depth interviews felt that women were not as valued in the seafood industry as they could be, despite their expertise, and perhaps because of their different approach:

*"[Women] are not seen as the experts, the knowledge providers and the wisdom holders. They are not accessed in that way"*

*"Women have to work really hard and a lot harder than men to get recognition"*

*"Women work more for the passion than the credit"*

*"There's still the old school licence holders who think I'm not going to achieve anything because I'm not a male, and still consider me to be a glorified secretary, and those sorts of comments...I'm not with the minister having a beer and I'm not slamming my fist down on the table. But there are the younger generations coming through that are more in tune with the fact that women can achieve things and we can really bring a lot of strength to the table"*

However, interviewees said that how the industry values women, depends on the values and culture of the organisations they were interacting with and the level of professionalism and maturity at the organisation or sector level. There were positive stories of strong culture that embraces diversity and there was a feeling that the younger generation of leaders are slowly changing how women are seen and valued:

*"It can be a professional industry but also a very non-professional industry"*

*"The difference between [the two organisations I worked for] was that one was made up of much more professionalised fishing businesses with a higher level of maturity"*

*"The culture of [my organisations] is a big thing. It is run to be a family friendly organisation."*

*"The culture of [my organisation] is people are valued on the basis of merit"*

*"In our business we support women a lot and feel that women have a lot to offer. The industry [in general] hasn't seen what women have to offer"*

*"[The inclusive culture in my organisation] is due to the governance of the organisation is very well established"*

The majority of women interviewed also said that, as a result of not valuing women, the seafood industry was at a disadvantage:

*"The undervaluing of women in the seafood industry and community across Australia means we are not as great as we could be"*

*"With a different culture, the industry could be so much better. Women are going to be important for that, especially in educating Australians themselves [about the seafood industry]."*

*"Women [who work with the seafood industry] are not valued or engaged with as male counterparts are. The richness is being lost. The expertise isn't as great."*

The majority of interviewees tried to identify why women weren't as valued as highly as they could be. This included the fact that women are often seen as playing a less important or '*supporting role*' in their organisations or to their male partners who tend to be '*out the front*'; that the work women do is often unpaid and unrecognised in family businesses; and women can be seen as the '*fixer of things*' rather than the driver of the organisation's strategy and making decisions:

*"I think generally we don't value people in those supportive roles as much as we should. We don't see the back office, we only see the front of house, the people up front doing the talking, and we don't see the people behind them who are just as important... Women are not visible because they are in supportive roles. When people get used to seeing women at the front of the business, then they associate the woman with the leadership position."*

*"A lot of the women work in background and make sure the work gets done properly and women don't get enough credit for it...they don't get recognition"*

*"I still get asked, can you go ask the boss? It's in the back of their mind that he is running the business and I'm just helping him out, or nagging him or telling him what to do"*

*"Women are not seen in the husband and wife run businesses, yet women are often the ones running the business. But they spend a lifetime being told they are an accessory to their husbands. She is the reason customers come in, the reason employees stayed, she did the bookwork, put up the original capital..."*

*"We can't underestimate the unpaid work that women do, to ensure that the business is successful, as mothers and sisters, looking after the children and grandchildren and the home. No one sees all the stuff women do to enable the men fishing or working in the business"*

*"Women are seen as the fixer of all things but not necessarily the driver or be able to take a business forward. The diversity of abilities that women have and the ability to juggle things, creates a disadvantage because we are spread too thinly across many areas so women don't become an expert on one thing... Women tend to agree to sort everything out because we are very capable...so then we create obstacles for ourselves to overcome because we don't get given opportunities to be part of certain new things because we are so bogged down in everything else."*

Women and men surveyed were also asked to agree or disagree with the statement about whether leadership teams valued the perspectives of women. 53% of respondents agreed or strongly agreed that some leadership teams do not value the different perspectives that women bring to the team. 18% of respondents disagreed or strongly disagreed, and 29% neither agreed or disagreed.

Again, men saw the situation in a more positive light than women. 41% of men agreed or strongly agreed, 27% disagreed or strongly disagreed, and 32% neither agreed or disagreed.

In comparison, 56% of women agreed or strongly agreed and only 16% disagreed or strongly disagreed. 29% neither agreed or disagreed (Figure 19).

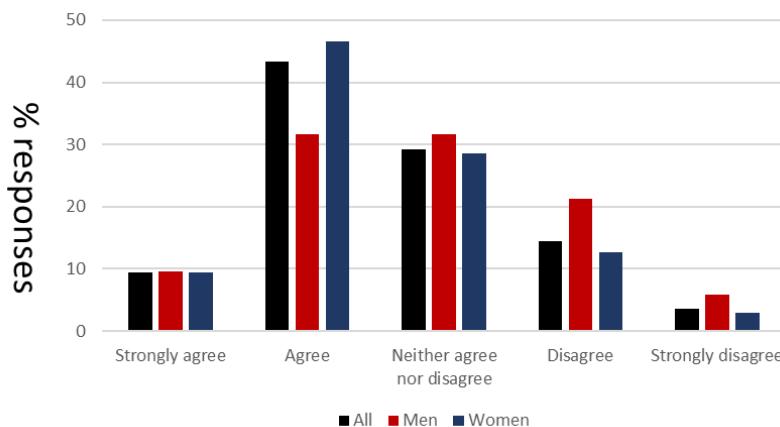


Figure 19. Percentage of women and men's responses to "Some leadership teams do not value the different perspectives that women bring to the team". Source: WISA 2021 Survey.

The cohorts of women (participating in the WISA 2021 survey) whose level of agreement with the statement "some leadership teams do not value the different perspectives that women bring to the team" was higher (more than 10% higher than the overall levels) included: women working in the services sector and women who had worked in the industry for 6-10 years. There were no cohorts of surveyed women whose level of agreement was lower (they disagreed by more than 10% than overall levels (Table 25, [Appendix 4](#)).

Table 25. Key findings of women responding to "Some leadership teams do not value the different perspectives that women bring to the team". Source: WISA 2021 Survey.

Variable	Key findings
Overall	56% of women agreed that "some leadership teams do not value the different perspectives that women bring to the team" 16% disagreed 29% neither agreed or disagreed
Sector	68% of women working in the services sector agreed that some leadership teams do not value the different perspectives that women bring to the team.
Time in industry	66% of women who had worked in the industry for 6-10 years) agreed that some leadership teams do not value the different perspectives that women bring to the team

### Being included

70% of women surveyed agreed or strongly agreed that their workplace had a culture that is inclusive of women. 13% disagreed or strongly disagreed and 17% neither agreed or disagreed (Figure 20). There were no cohorts of women whose level of agreement differed by more than 10% (agreeing or disagreeing).

When men and women were asked about the culture of the seafood industry overall, the result was less positive. 38% agreed or strongly agreed that “the culture of the Australian seafood industry is inclusive of women”, 27% disagreed or strongly disagreed and 35% neither agreed or disagreed.

More male respondents agreed that the culture of the industry was inclusive of women (45% agreed or strongly agreed), compared to women (36% agreed or strongly agreed). 19% of men disagreed or strongly disagreed compared to 29% of women disagreed or strongly disagreed. 36% of men and 35% of women neither agreed or disagreed (Figure 21).

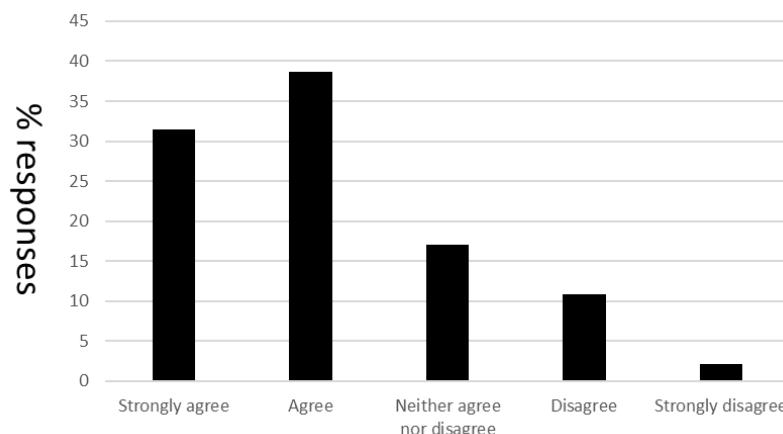


Figure 20. Percentage of women's responses to "My workplace or sector has a culture that is inclusive of women". Source: WISA 2021 Survey.

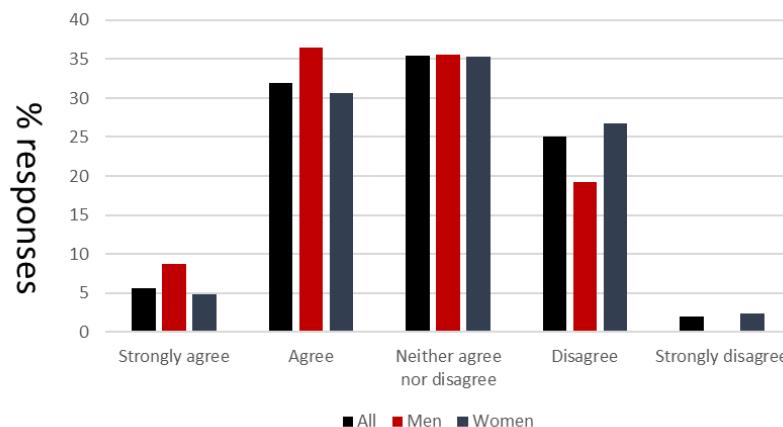


Figure 21. Percentage of women and men's responses to "The culture of the Australian seafood industry is inclusive of women". Source: WISA 2021 Survey.

Most of the women we interviewed in-depth said the culture of the seafood industry needed to be more inclusive of women, that it is lagging behind other Australian industries, and it is stubbornly difficult to shift.

*“It is obvious when you look at major industry events. Every time these industry gatherings come up, I look at who is there. Who is talking, who has got the keynote, who is on the flyer,*

*whose faces are we seeing, who are we acknowledging? [Women are] still missing. It's a little bit better. And I'm sure there are people out there who are congratulating themselves about that, but I've been in this industry for a long time and it's not a big move. If women are not seen at the top, then women are not elevated."*

*"[The industry] has an old school culture and mentality. I left the industry for a while and felt for the first time my voice was heard. Before that I had nothing to compare it to, so it was normal [to be excluded]. But I feel that there is very little I can do can change the culture of the organisation. It is difficult because the men have been in the business for a very long time"*

*"The sexual harassment doesn't really bother me, what does bother me are the powerplays where they don't let me in"*

*"It is more than just male domination. It is unwillingness to change. They're scared. There is a fear of adopting new technologies, there is a fear of letting go of their patch... I can attract women into the organisation, but the trick is retaining them. They can be great people who have lots of energy and are keen, but they come and then find an industry that is old fashioned, stuck in its ways"*

Only a couple of women interviewees said they saw no issues with gender inclusivity now:

*"The reason there are more men at the top now is because there were more men involved in the industry in the past and now they have elevated to the positions of power. I don't see gender as an issue, it's just ability"*

When describing a culture which they felt excluded from, most women interviewed spoke about a 'boys club', which reflected the Australian culture and the history of the industry being male dominated:

*"Culturally Australians tend to separate men and women, even in social situations, much more than other countries"*

*"It's an old boys club. The seafood industry is an industry which is about what your reputation is, who you know, and who knows you. It's very much that if you are new to the industry and you are not known, it takes a long time to get the trust and respect of the old school people. You look at women who have grown up in the industry and lived the industry, but its only in the last few years that they has been given the respect to take the [leadership] positions...women really have had to earn their worth before anyone takes notice"*

*"The multigenerational nature of the seafood industry, particularly of men, has given them a sense of entitlement to have the top positions. If you haven't been there for long enough, then you can't understand. It's been hard and we [the men] have had to put up with that and you [women] don't understand and you don't get it. The whole of industry is the same, whether it is research or selling fish. They have all been there forever, and they all have grown up together patting each other on the back!"*

*"There is a boys club when it comes to hiring. When a man and a woman are up for the same senior job our general manager will prefer the man. I suppose it is natural to want to work with people that you can connect with, or feel they are similar."*

*"At [my old job] it was a boys club. They didn't look at the skills, expertise or experience I had."*

The boy's club was also associated with men in leadership positions tending to favour people that were similar to themselves, and don't necessarily value the different ways women may work:

*"If what we see is older grey-haired men in powerful positions, then that is what we look for. Until we stop seeing this, then the broader industry can't look for anything else. There is responsibility of these men to be brave, and to call it out and say no we need more diversity sitting at the table."*

*"The male culture favours other men like themselves particularly in the way they negotiate. They bullshit themselves, but they believe the other men even though they know that men bullshit! How does that work? Why wouldn't they listen to the women if they know the men bullshit all the time?"*

*"Women don't like to compete in the same way as men, with bravado and talk. [In my role] I don't want to make unsubstantiated claims without assumptions being presented. Despite women having a lot of knowledge they are not being as bold in the way they talk about things as men and this translates into them not being as competitive to secure investment and funding."*

*"There is a cowboy mentality in the aquaculture industry. It is a relatively new industry and Australia is still emerging in the aquaculture space. It's a goldrush type thing, staking your claim, and not sharing or learning from anyone. This mentality doesn't lend itself to building teams. Women are more inclined to build teams."*

*"If I see the minister, I don't want to go out for dinner and schmooze, I want to have a one-on-one meeting and address the issue".*

The boy's club was also associated with traditional cultures and roles of men and women:

*"Men are the boss because it is assumed that buying and filleting the fish is the most important role in the independent retail business. The wife 'works in her husband's business'. That statement is appalling to me. I hate that statement. Because they are not usually working in their husband's business, they are usually running it."*

*"The family expectation on women [in my culture] is also a factor. Women have to be the perfect mother, the perfect wife, the perfect hostess, and work in the business without acknowledgement, and do what they are told. Men are the providers and at the top of the family."*

Some interviewees spoke of how some women feel and act like they have to 'fit in' to the male-dominated world of the seafood industry and its ways of working.

*"Seafood is very cut-throat and the women behave like the men to get respect"*

*"The rare woman who does sit on a committee behaves in a very blokey way, almost over the top, so that they fit into the male world"*

*"Women in the industry have to adapt to the male world to get ahead. Women who lead the industry associations, they adapt to the male world all the time. The women are strong, but if you watch them, they are forever adapting to the male world...their behaviours are changing to fit in with men. They have to make the effort to go into the male world rather than the other way around. They have to adopt male traits, you have to go for a drink with the boys. I don't think that would happen in other industries, I've not seen the level of gender bias in other industries I've worked in."*

Some interviewees also spoke of women needing to 'be strong or tough' to succeed:

*"In the [postharvest] sector you have to deal with fishermen and freight companies and you have to be tough, to deal with extreme masculinity. You need a thick skin and some women may feel uncomfortable in that environment"*

*"Even if I am weak, I won't show it...until I get in the car"*

*"Women have to be strong, commercially astute to work in that environment. When we have had women working on the floor, they have to be strong willed, because it can get quite aggressive. You have arguments about price and quality and you have to be able to stand up to aggressive men and challenge and be confident you are right. To do it day in and day out and be continually challenged. You can break. Even if you are a man, but more so if you are a woman"*

*"You have to have a thick skin to be a woman working in this industry. You have to be able to dish it back. You have to hold your own"*

Some interviewees also spoke of organisations where the culture was inclusive through valuing skills over experience and creating a supportive environment for women to learn. A number of these interviewees felt the younger generation of leaders are more open to change compared to the older generation, and will take the opportunity to develop a more inclusive industry:

*"There is greater recognition that boards need to move into more a skills-based board rather than representative-based. This may naturally attract more women but it is not being driven by a diversity agenda"*

*"Now the new generation is coming into leadership in the industry which is changing the dynamism and adaptability of the industry. The younger generation are more willing to change compared to those who are older."*

*"I don't think the old boys club is changing, I just think they are petering out with the younger generation coming through...it's just whether they pick up their father's traits. Some of the younger men, not all, are shifting the attitude to women"*

*"Women in fishing and aquaculture industries is more acceptable than it used to be, because of the older generation leaving. The new generation have seen the success of women and so are more open"*

*"The typical older man being the EO in industry organisations is changing, its younger people and more women. It changed because the industry started to see younger people and women being effective in the role and so the diversity has improved in the last 10 years. The role doesn't have to be a 60 year old industry person anymore."*

### 5.3.4. Having enough support to access networks and champions, and balance responsibilities outside work

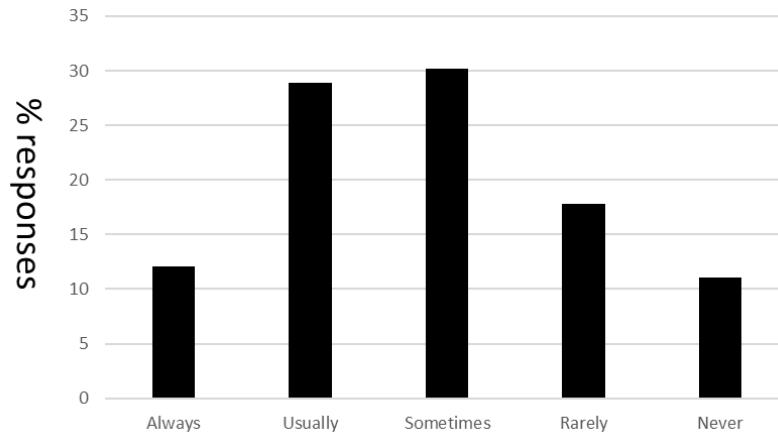
#### Women's access to networks, champions and mentors

41% of surveyed women said men always or usually have greater access to people who champion them in their career than women do in their workplace or sector. 29% of women said this is rarely or never the case and 30% of women said this was sometimes the case (Figure 22).

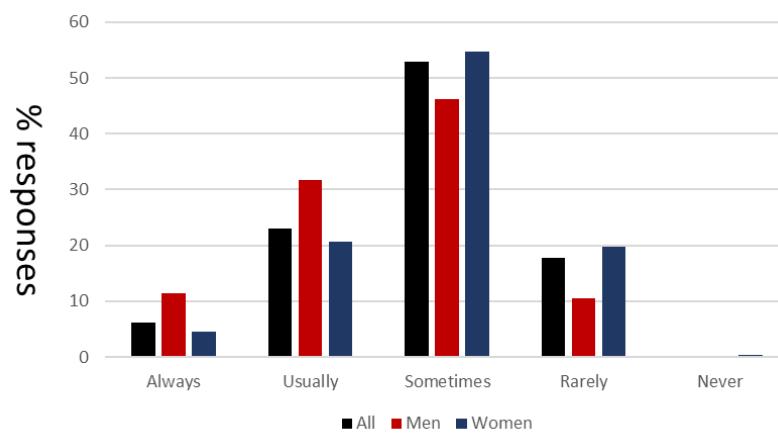
When men and women were asked about whether women are championed by industry leaders in the Australian seafood industry in general, 29% said always or usually, 18% rarely or never and 53% said sometimes.

Comparing men and women's responses, 25% of women said women are always or usually championed by industry leaders in the seafood industry, compared to 43% of men. 20% of women

said women are rarely or never championed by industry leaders in the seafood industry, compared to 10% of men. 55% of women said women are sometimes championed by industry leaders in the seafood industry, compared to 46% of men (Figure 23).



*Figure 22. Percentage of women's responses to "Men have greater access to people who can champion them in their career than women do at my workplace or sector". Source: WISA 2021 Survey.*



*Figure 23. Percentage of women and men's responses to "Women are championed by industry leaders in the seafood industry". Source: WISA 2021 Survey.*

The women we interviewed were all successful in their careers. All of the women interviewed clearly recognized the importance of networks, mentors and champions and how this helped to get them into the positions they were in.

*"Support is really important for women. When I was challenged about being able to take on the role [and manage the kids], one [male board member] was the only one who said if she says she can do it, she can do it."*

*"Mentoring is important to encourage and foster ambitions that might be there...and creating a safe space to talk about it"*

The supportive relationships interviewees talked about took many different forms, including:

- Networks of women, including WISA, local industry women, women in the family business, being there to talk issues through and offer support and encouragement
- Support from men in the industry, including for women progressing into non-traditional roles, men in the family business calling out gendered bias, for supporting and treating women equally to male employees, and encouraging progression
- Mentoring and support from leaders in the industry, including managers and boards, providing opportunities and encouragement as well as more formalised mentoring, and creating a supportive culture in organisations:

*[The business I work in] creates opportunity for women, who in the past would just come to work and go home, and not step up because they wouldn't think there was any reason to. Now the women know there is opportunity, they do want to put themselves out there because of the environment the company has built. I have a mentor at work who is guiding me in my career. I look up to him as a leader and the values he has. If I make a mistake, he encourages me to learn from it. If I do something good he makes sure I am recognised. He challenges me. I am learning to be a better leader through him and give my staff encouragement and opportunities"*

A few interviewees spoke more generally about the lack of support in the industry for women:

*"The industry doesn't have a support network for women who want to progress."*

*"Compared to the corporates, a lot of my friends work in corporates, I don't feel supported. Maybe it is because the seafood industry is not as formal"*

*"I often see women not being activated, not given ability to grow or understand how important she is to the business"*

*"The reality is that if you are doing something different, no one backs you until you 'make it there'. No one acknowledges you when you are in the shit and no one helps you when you are in the shit. They don't want to back you in case you fail. People want to back the safe option. The industry isn't friendly like everyone makes it out to be. It's intimidating. And they don't know how to share information. Their attitude is this is how we learned so this is how you need to learn...but we have the ability to choose how we teach the next generation"*

The cohorts of women (participating in the WISA 2021 survey) who said it was always or usually the case that men have greater access to people who can champion them in their career than women do at my workplace or sector, was higher (more than 10% higher than the overall levels) included: women who had worked in the industry for 11-15 years. Cohorts of surveyed women who said it was rarely or never the case that men have greater access to people who can champion them in their career than women do at my workplace or sector (by more than 10% than overall levels) included: women who had worked in the industry for 0-2 years, and women who worked in organisations with 5-20 people. Cohorts of surveyed women who said this was sometimes the case (by more than 10% than overall levels) included: women who worked in organisations with less than 5 people, or who had a female boss (Table 26, [Appendix 4](#))

*Table 26. Key findings of women's responses to "Men have greater access to people who can champion them in their career than women do at my workplace or sector". Source: WISA 2021 Survey.*

Variable	Key findings
Overall	41% of women said men always or usually have greater access to people who champion them in their career than women do in their workplace or sector 29% of women said this is rarely or never the case 30% of women said this was sometimes the case
Time in industry	59% of women who had worked in the industry for 11-15 years said men always or usually have greater access to people who champion them in their career than women do in their workplace or sector 40% of women who had worked in the industry for 0-2 years said this was rarely or never the case
Gender of boss	41% of women with a female boss said this was sometimes the case
Organisation Size	39% of women who worked in organisations of 5-20 people said this was rarely or never the case 40% of women who worked in organisations of less than 5 people said this was sometimes the case

### Support for women balancing responsibilities outside work

44% of women surveyed said they had caring responsibilities that impacted their work (Table 27).

*Table 27. Percentage of women surveyed who have caring responsibilities (e.g., children, parents) that impact their work. Source: WISA 2021 Survey.*

Sector	% Women who have caring responsibilities that impact their work
Fishing	52
Aquaculture	33
Postharvest	49
Government	43
Service	45

75% of women surveyed agreed or strongly agreed their job gave them the flexibility they needed to manage their work and homelife. 11% disagreed or strongly disagreed and 14% neither agreed or disagreed (Figure 24). This response is understandable given it is likely a consideration for women choosing their job is so they can manage both.

When looking at cohorts of women, there was one notable variation to the overall result. 21% of women who worked in “Other” roles (e.g., labourers, sales assistants, technicians) disagreed or strongly disagreed that their job was flexible enough to manage responsibilities outside work (See [Appendix 4](#)).

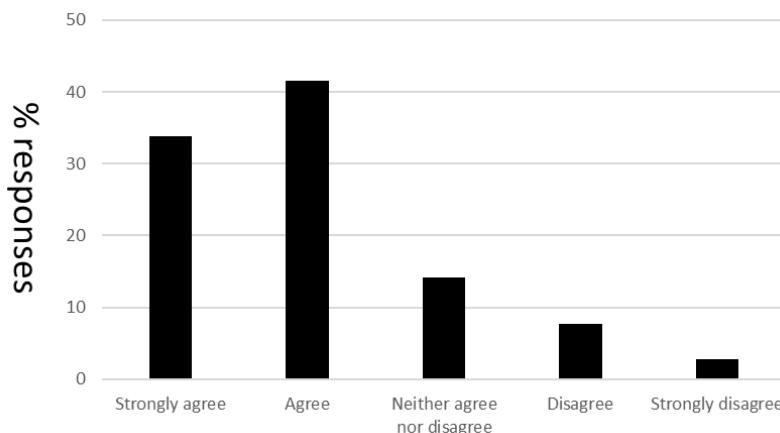


Figure 24. Percentage of women's responses to "My job gives me the flexibility I need to manage my work and homelife". Source: WISA 2021 Survey.

Women we interviewed discussed the need for a flexible work environment that supports women who have responsibilities outside work such as caring for family, and that the seafood industry (like other industries) does not always cater for this.

The work hours of some paid roles in the industry can exclude women who have caring responsibilities, for example in factories where the hours might be at night or early morning, or in academia where the hours are exceptionally long. Two interviewees suggested that women may choose occupations, such as those in an office even if they are overqualified, because of the regular hours and compatibility with having a family. Another interviewee suggested that women may be discouraged from taking industry association or committee voluntary roles because of the level of time commitment required and the difficulty for some women to balance with other responsibilities outside work.

Two women interviewees from the postharvest sector told us stories of how some managers in the seafood industry don't tolerate workers needing flexibility for outside caring, such as for young children:

*"I tell my workers to just tell him that you are sick, not that you have to be there for your kids. I try to protect them in that sense. He won't have a bar of it"*

*"Younger managers, men, who don't have kids don't get what it is like for women with children. The business does not like to employ women with children, especially single mothers, because it means they are 'unreliable'...my child was sick for a couple of weeks and I didn't work the 38 hours for a couple of weeks. They offered I go to a part time contract, even though I consistently work more than 38 hours usually {and has done for years}"*

On the other hand, there were also encouraging stories from a few interviewees of seafood businesses and organisations that operate with a family friendly culture:

*"We are flexible about hours so that women can pick their kids up from school. We've also noticed women are attracted into technician roles and are looking to change the rosters to make the job more conducive to women who have small children applying. We also do a four*

*day on, three day off roster which is better for all workers, the men who get to spend more time with their kids as well as the women."*

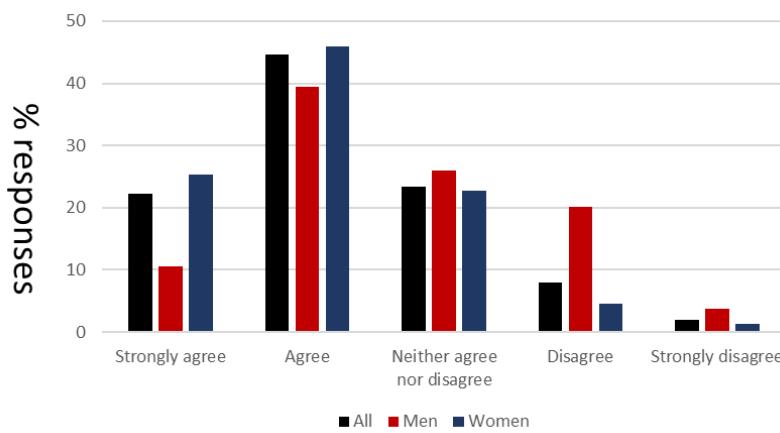
*"The culture at [my organisation] is a big thing. It is run to be a family friendly organisation. If I need to take care of my kids, they let me have leave or I can work from home. Family comes first and everyone has this attitude at the company."*

*"The fact that it is a family business means that we can pull together and look after each other when needed. But the women in the family still have to take on the responsibility of keeping the house and family."*

*"In government it is a much easier place to have a work-life balance. There are a lot of women in senior positions in the public service. I feel like I definitely have more female role models in the public service."*

In the WISA 2021 survey, we asked men and women participants to agree or disagree with the statement "Having a family can have a negative impact on a women's career progression compared to men in the seafood industry". 67% agreed or strongly agreed that having a family can have a negative impact on a women's career progression compared to men in the seafood industry. 10% disagreed or strongly disagreed, and 23% neither agreed or disagreed.

There was a clear difference in how women and men felt about this statement. 71% of women agreed or strongly agreed that having a family had negative impact on a women's career progression compared to men in the seafood industry, compared to 50% of men agreeing or strongly agreeing. 24% of men disagreed or strongly disagreed compared to 6% of women. 23% of women and 26% of men neither agreed or disagreed (Figure 25).



*Figure 25. Percentage of women and men's responses to "Having a family can have a negative impact on a women's career progression compared to men in the seafood industry". Source: WISA 2021 Survey.*

In interviews, women spoke of the disadvantage to their careers if they took time out to have a family, particularly the women who worked in government and the academic sectors. All of these interviewees spoke of a common structural barrier to many working women in Australian society, taking time off or reducing hours to part time affected women's progression and promotion opportunities:

*“Having children means that women tend to go part time and stay part time for a while. Promotion may not be a priority after having children, but also the time away from the job means you have less experience to get the promotion. It’s a structural thing...I feel like I should wait to have children until I feel established, so I’m working harder now to prove myself, so I’ve got the track record and, almost to justify having children, otherwise I feel like it will be harder to climb the ladder”*

*“One senior woman in the department came and talked to me when I was promoted. She talked about choices between career and family, and seemed to say to me that she hadn’t realised she was making the sacrifice when she was climbing the ladder. It was great to have someone to give me that support and perspective [as a woman in this job]”*

*“Women do not progress because of the metrics for promotion in academia. I might have a lack of papers because of time out for family... having children has an impact on progression in academia because it is based on what you have produced not skillset”*

Two women interviewed also spoke of the importance of men or partners at home stepping up to take more responsibility in the home:

*“I have a supportive husband which allows me a big workload”*

*“It is more acceptable for men to stay home and look after the children, which means that women are free to follow their passion, if they have a passion for seafood or aquaculture”*

### 5.3.5. Having equal access to progressive opportunities

#### Unequal access to career opportunities

53% of women agreed or strongly agreed that they had the same chance of promotion or get a leadership role as men in their workplace or sector, while 24% disagreed or strongly disagreed, and 23% neither agreed or disagreed (Figure 26).

We also asked both men and women to agree or disagree with the general statement about the seafood industry: “Women have equal chance of promotion and leadership roles as men in the seafood industry”. 30% of respondents agreed or strongly agreed that women had equal chance of promotion and leadership roles as men in the industry. 38% disagreed or strongly disagreed, and 33% neither agreed or disagreed (Figure 27).

When comparing men and women’s responses, men saw the situation more favourably than women. 47% of men agreed or strongly agreed that women have the same chance of promotion as men in the industry, compared to 25% of women. 29% of men disagreed or strongly disagreed compared to 40% of women. 35% of women and 24% of men neither agreed or disagreed.

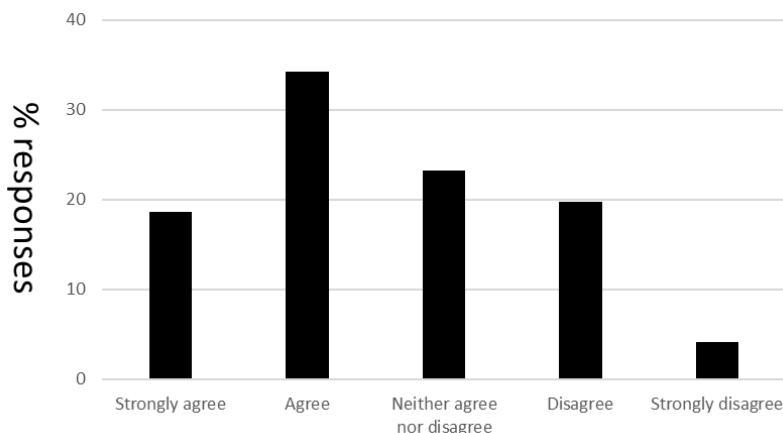


Figure 26. Percentage of women's responses to "I have the same chance for promotion or get a leadership role as the men in my workplace or sector". Source: WISA 2021 Survey.

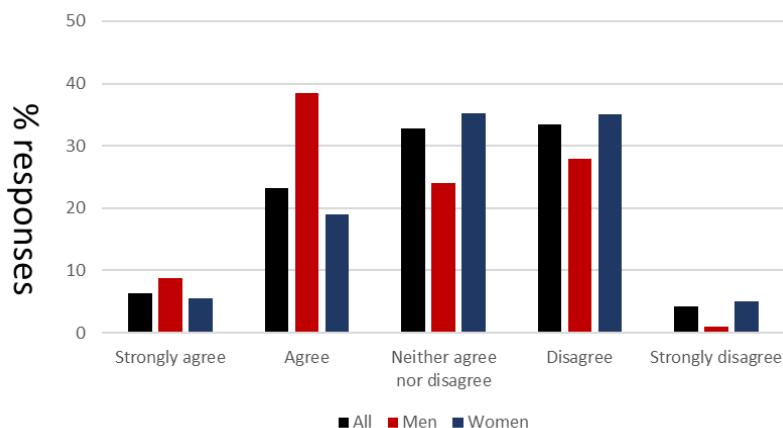


Figure 27. Percentage of women and men's responses to "Women have equal chance of promotion and leadership roles as men in the seafood industry". Source: WISA 2021 Survey.

The cohorts of women (participating in the WISA 2021 survey) whose level of agreement with the statement "I have the same chance for promotion or get a leadership role as the men in my workplace or sector" was higher (more than 10% higher than the overall levels) included: women in managerial roles, and women who worked in organisations of 5-20 people. Cohorts of surveyed women whose level of agreement was lower (they disagreed by more than 10% than overall levels) included: women who had worked in the industry for 6-10 and 11-15 years (Table 28, [Appendix 4](#)).

Table 28. Key findings of women responding to the statement "I have the same chance for promotion or get a leadership role as the men in my workplace or sector". Source: WISA 2021 Survey.

Variable	Key findings
Overall	53% of women agreed that they had the same chance of promotion or get a leadership role as men in their workplace or sector 24% disagreed 23% neither agreed or disagreed
Role	63% of women in managerial roles agreed that they had the same chance of promotion or get a leadership role as men in their workplace or sector
Time in industry	33% of women working in the industry for 6-10 years disagreed 41% of women working in the industry for 11-15 years disagreed
Organisation size	63% of women in working in organisations of 5-20 people agreed that they had the same chance of promotion or get a leadership role as men in their workplace or sector

Interviewees discussed the perceived barriers to women's leadership. A few interviewees said that women weren't putting their hands up for leadership roles or there are assumptions that she doesn't have the required expertise for a leadership role:

*"Boards tend to be made up of business owners so tend to be male. There are very few female business owners. You need the skills of business ownership to be a board member. So the question really is, why are there not more women who own businesses? If she is the bookkeeper of a business, she isn't the right person to be at the management committee table, it's the one who makes decisions and who has the knowledge of the industry as a whole"*

*"Women aren't applying for board positions. Women need to get over that fear of applying and there needs to be support to apply so that women can showcase their skills and have them valued"*

*"It takes strong women to put their hands up for leadership positions. It feels like a male pathway despite women's ability. I can see the men in the company building themselves to progress to a certain position. Women shouldn't worry about this and put their hands up."*

Two interviewees challenged the attitude that women need to put their hands up, instead it requires an all of industry approach:

*"People say [gender equality] is everyone's responsibility and that women need to put their hand up. And we [women] do, but then we don't get seen. It is not true that the industry can't find women to hold these positions. She is there but she is not seen."*

*"Women need to be seen as influencers and have the ability to create change, women need to be given more opportunities to engage. For example at the last Seafood Directions [conference] the speakers were dominated by male voices"*

In both the surveys and interviews, both women and men identified that women undersell their experience and capabilities. In the 2021 WISA survey, 59% of participants said that women always or usually undersell their experience and capabilities. 5% of respondents said this was rarely or never the case, and 36% said it was sometimes the case.

Women were more likely to say that women always or usually undersell their experience and capabilities say this (66% of women) than men were (33%). 4% of women said this was rarely or

never the case compared to 12% of men. 31% of women said this was sometimes the case compared to 56% of men (Figure 28).

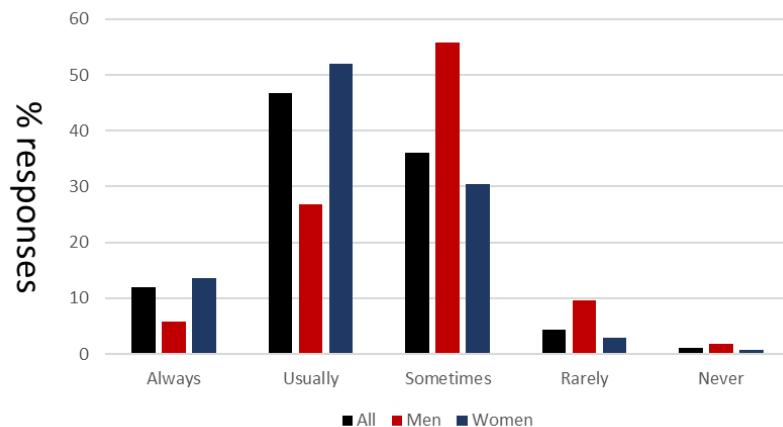


Figure 28. Percentage of women and men's responses to "Women undersell their experience and capabilities". Source: WISA 2021 Survey.

About half of the women interviewed discussed the lack of confidence women have to put themselves forward for leadership positions, saying that:

*"Women lack confidence in what they don't know, whereas men are more willing to do something they don't know how to do"*

*"With women often being in support roles and behind the scenes, it may be a confidence thing, where women are maybe not confident to put themselves forward"*

*"Women need to be more confident. It might be a mindset thing. We need to change that"*

*"Women need to develop their own capabilities and develop a supportive network to help them do that, especially if they are not confident"*

*"Women are not good at grabbing acknowledgement or asking for it...women are not always good at stepping in and saying I can do this, they wait to be asked or pushed."*

*"Women are not good at talking about themselves...the "i". Women tend more to recognise the team, which is really important, and is everything in business. But women need to also develop their 'i'. A little bit of arrogance is okay, accept your wins and acknowledge yourself rather than waiting for others to do that. Women are not good at recognising their own strengths"*

One interviewee suggested that women are less ambitious in their career and choose a more balanced lifestyle over career progression.

*"Maybe women are less career hungry as men and are more satisfied with what they do"*

In the 2021 WISA survey, we asked participants to respond to the statement "Women choose a more balanced lifestyle over career progression in the seafood industry". 34% of respondents said that women always or usually choose a more balanced lifestyle over career progression in the seafood industry, 58% said this was 'sometimes' the case, and 8% said this was rarely or never the case (Figure 29).

There was a difference between men and women's responses. 36% of women said it was always or usually the case that women choose a more balanced lifestyle over career progression in the seafood industry, compared to 26% of men. 9% of women said this was rarely or never the case compared to 5% of men. 55% of women said this was sometimes the case compared to 69% of men.

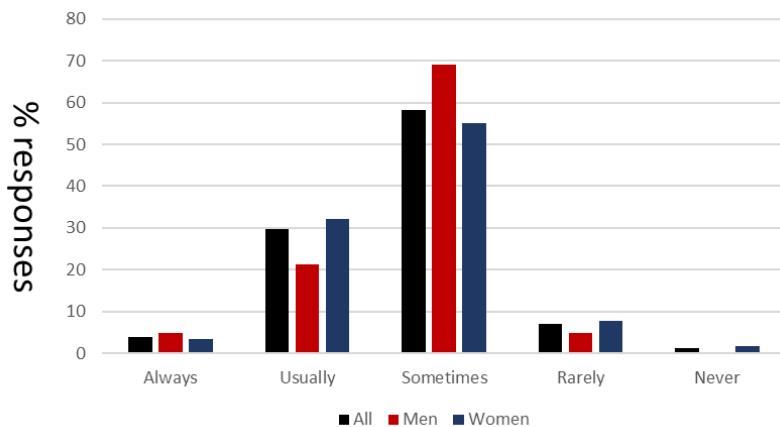


Figure 29. Percentage of women and men's responses to "Women choose a more balanced lifestyle over career progression in the seafood industry". Source: WISA 2021 Survey

## 6. DISCUSSION

Women are an important component of the Australian seafood industry, present in every sector working in the supply chain and with the industry, and every organisation type. Until this project, Australia had little data on women's contributions to the seafood industry and the roles women play. Furthermore, there was little industry-wide understanding of women's experiences working in the Australian seafood industry, if and where there are inequalities and gendered differences in experiences, and where barriers lie to women fully participating and progressing in the industry.

This project used a combination of data sources, including Australian Bureau of Statistics Census data, in depth key informant interviews, and an online survey, to reveal answers to these questions first asked by Women in Seafood Australasia twenty years ago.

### 6.1 WOMENS PARTICIPATION AND ROLES

Compared to almost half of Australia's workforce being women, and a third in agriculture women, the Australian Bureau of Statistic 2016 Census revealed that 24% of the seafood industry's workforce are women. Although there is uncertainty around this estimate and it is possibly an underestimate (see Section 6.4 Data availability, limitations and recommendations), there is a concerning trend over time. The number of women in the seafood industry appears to be declining (by 20% between 2006 and 2016). Across the same time period, the number of men in the seafood industry has remained about the same and across agriculture women's participation has increased. When the numbers are examined by sector, it appears while opportunities and participation of men increased by over 40% in both fishing and aquaculture between 2006 and 2016, they did not for women.

Questions remain about why this trend has occurred, whether it be data issues, policy changes, technological change, or whether opportunities are capturing men and not women.

The roles that women have in the seafood industry are diverse and varied. When comparing the percentage of men and women in broad types of roles using ABS Census data, women dominate in 'traditional' roles, for example, more than 80% of clerical and administrative jobs are held by women, and women are under-represented compared to men in all other roles including professional roles (e.g. science, accountancy, marketing) and technical roles (e.g. labouring, technicians, customer service). However, when the data (ABS Census 2016) are examined in terms of proportion of women workers in roles, the story shifts. While 32% of women working in seafood are clerical and administrative workers, 45% of women work in labouring, technical and customer service roles.

While there is a need to know more about the demographics of the women working in the seafood industry, analysis of ABS Census 2016 data was able to uncover that, with the exception of aquaculture, the industry has an aging female workforce similar to the male workforce. Women in the industry overall also tend to have a higher level of education compared to men across all sectors of the supply chain. There is a high proportion of migrant women born overseas, particularly in the postharvest sectors, and this is much higher than the proportion of migrant men. Migrant women working in the industry tend to come from southeast and northeast Asian countries. There are also fewer Aboriginal and Torres Strait Islander women working formally in the industry than men.

## 6.2 IDENTIFIED AREAS OF INEQUALITY AND GENDERED DIFFERENCES IN WORKFORCE PARTICIPATION AND EXPERIENCE

Through this research, it has been possible to identify clear areas of inequality and gendered differences in participation and experience. Using ABS Census data, men dominate the CEO and executive manager positions, with women holding 15% of these roles across the seafood industry. 17% of seafood businesses are owned by women, compared to 30% in agriculture.

The fact that more men occupy higher positions in the seafood industry is reflected in the gender pay gap, which was 15% for the seafood industry in 2016 (compared to 14% Australia wide).

A significant contributor to the gender pay gap and women's ability to progress into higher paid roles is the time women spend in unpaid domestic labour compared to men in the seafood industry. Almost two-thirds of full time working men do less than five hours domestic labour per week with a quarter of these doing nil hours. While two-thirds of women working full time do more than five hours a week unpaid domestic labour, and a quarter of these doing more than 15 hours per week (compared to 8% of men).

Thirty percent of women who were surveyed as part of the research said they were worried about job security. Although, the survey did not ask men the same question, interviews revealed one possible reason for job insecurity through a gender lens, which is fixed contract work. Contract work has differential impacts for women and men. In particular, when a sector is characterized by contract work, taking time out or reducing hours to have a family or undertake caring

responsibilities, can mean it is difficult for women get back into work again or progress. The research was not able to uncover any differential effects of casualization on women, and this is an area to explore in future work.

## 6.3 CULTURAL AND SYSTEMIC BARRIERS TO WOMEN'S PROGRESSION

The research presented here shows clearly that there is a diversity of experiences and perceptions among seafood women about whether there are cultural and systemic barriers to women's progression in the industry. Women in the seafood industry do not stand as one view or experience, and the culture varies between organisations. Significant proportions of women indicated they did not believe there were gendered barriers or had not experienced them, and another proportion did not say either way.

However, this research has identified through interviews and an industry survey that cultural and systemic barriers impede a significant proportion of women's progression in the seafood industry (outlined in detail in Sections 5.3.3-5.3.5):

*"The opportunities are equal, but the structures in place provide barriers for pathways for women, and the pathways are often blind to women"*

*"Some of it is laziness, some is lack of knowledge (and this group is getting smaller) and then there is wanton disregard. It is the wanton disregard which is holding us back"*

One in five women in the seafood industry surveyed said there was sexual harassment in their workplace or work environment. In comparison the Respect@Work: National inquiry into sexual harassment in the workplace (2020) found that 39% of women had experienced sexual harassment in the previous 5 years and 23% in the previous 12 months. It may be that the 20% estimate in the seafood industry from the survey results is inaccurate given the survey was not a representative sample (see 6.4 Data availability, limitations and recommendations). It is also possible that it is an underestimate, as relying on participants subjective assessments of sexual harassment is problematic, for a number of reasons outlined in the Respect@Work report. Individuals may not perceive behaviour they have experienced as sexual harassment, people have different awareness of their legal rights, and people do not always understand what behaviours constitute sexual harassment. Twenty percent, nevertheless, is a concerning figure. Interviews revealed that there can be a lack of organisational support to address sexual harassment and frequently there is nowhere for women to go to report sexual harassment or do something about it in, especially in smaller organisations.

The findings from the survey revealed that significant proportions of women face cultural barriers which impact their experience and progression in the seafood industry. While the majority of women felt they were treated with respect at their workplaces, 27% of women surveyed said that they were not taken seriously as men in their workplaces, 27% of women felt like their skills and experience were always or usually undervalued compared to the men, and 56% of women said that some leadership teams do not value the different perspectives that women bring to the team.

*[Women] are not seen as the experts, the knowledge providers and the wisdom holders. They are not accessed in that way"*

While 70% of women said that their workplace had a culture that was inclusive of women, and interviewees gave examples of organisations which prioritised inclusivity and diversity, only 36% of women said the industry more broadly had a culture that was inclusive of women. Reflecting on industry culture, the majority of interviewees spoke about the 'boys club', which they felt mirrored Australian culture and the history of the industry being male dominated. The boy's club was also associated with men in leadership positions tending to favour people that were similar to themselves. One quarter of women said that women did not have an equal chance of promotion as men in their workplace.

One possible way to shift culture and open pathways to women to progress is to improve women's access to networks, champions and mentors. Forty-one percent of women surveyed said that men tend to have greater access to people who champion them in their career than women in their workplaces. Women interviewed in this research were all successful and clearly recognised the positive impact networks and champions had on their careers. These included networks of women, support from men, and from leaders in the industry.

Women surveyed and interviewed were very clear about structural barriers to women's progression. Seventy-one percent of women surveyed said that having a family can have a negative impact on a woman's career progression compared to men in the seafood industry. In interviews, women spoke of the disadvantage to their careers if they took time out to have a family or take on caring responsibilities, but also what was required to remove this barrier. This included workplace acknowledgement of responsibilities outside work, flexible working environments, removing metrics that punish for taking time out or reducing hours. Equality at home was also raised, with partners being supported and encouraged to take time out for caring, as well as stepping up with unpaid domestic work.

Although the sample of men surveyed was not large nor representative, there was a notable difference between men and women in terms of their perspectives on cultural and structural barriers. Men were more likely to say that women were treated with respect, were valued and included, than women were. Men were more likely to say that women were championed and were less likely to recognise that women were disadvantaged by having a family. Men were also more likely to agree than women that women have the same chance of promotion as men in the industry. This difference in perceptions and perspectives between men and women, and within both groups, perhaps indicates the need for applying a gender lens to uncover gender biases. While recognising that there may be no bias in some organisations, it is also important to note that gender bias can also be invisible when it is implicit, unintentional and embedded in society, and it can be difficult to determine whether bias is playing a role in any given interaction. Applying a gender lens, for example to policy making, organisation's strategic plans, research priorities, extension programs, and employment and recruitment processes (see FRDC 2011-410), can strengthen understanding of how social norms, systemic barriers, and interpersonal dynamics interact at workplaces. It is an important step toward creating effective, and more gender equitable outcomes.

The research presented here also indicated there is a view that there is a need to ‘fix women’ (i.e., make women be more board-room ready, and more confident) and that women themselves are failing to take up available opportunities. Fifty-nine percent of survey respondents said that women undersell themselves, including 66% of women respondents.

*“Women lack confidence in what they don’t know, whereas men are more willing to do something they don’t know how to do”*

Perhaps related to this is whether women and men equally perceive themselves as being part of the Australian seafood industry. In the survey, respondents were asked whether they identified that they worked in the seafood industry in the ABS 2016 Census. Although all respondents worked in the seafood industry, 45% of women said yes compared to 68% of men, and women consistently had a lower yes response across all sectors working in and with the industry.

While supporting women’s access to professional development opportunities is important, this research has revealed that perhaps some women don’t feel they belong in the seafood industry, which may be reinforced by the culture of the industry. The masculinity contest (i.e., show no weakness, strength and endurance, work first, and ruthless competition, are prized) is prevalent in some organisations in industries like the Australian seafood industry. There is a clear business case against this because it is correlated with organisational dysfunction and doesn’t encourage cooperation and teamwork which organisations rely on to succeed. Instead, it puts organisations effectiveness and reputation at risk. Yet, masculinity contest cultures persist because either the perceived association between masculinity and success is strong or questioning the culture results in being identified as the ‘loser’ in the contest.

Although this framing does not apply to the whole of the seafood industry, it is useful for taking the next step of determining how to shift cultural and systemic barriers and biases. Diversity initiatives are unlikely to create change unless organisations commit to deep examination and diagnose their cultures. This is where leadership is required, with the people who have the power to create change. Leaders need to generate awareness of the value of changing culture, not as a compliance measure or to ‘make things better for women’ but linked to the organisations core values in an authentic way. Leaders need to publicly reject masculinity contest norms and poor behaviours, empower people to speak up, and model and reward desirable behaviours.

## 6.4 DATA AVAILABILITY, LIMITATIONS AND RECOMMENDATIONS

This analysis has combined both population-wide data collected through the ABS Census with targeted survey and interview data. In doing this, it has been possible to compare the census and survey datasets and identify potential sampling issues and biases. The targeted survey and interview data has also supported further interpretation of the Census data.

ABS Census statistics are an important data source and provide the basis for comparison of identified seafood sectors with other sectors in agriculture and primary industries. However, these statistics are potentially somewhat misleading in terms of women’s true participation in the Australian seafood industry, particularly in post-harvest sectors. Moreover, the data are coarse and only provide a broad picture of women’s participation in the seafood industry, and little about the

roles women play in the industry. The data on the seafood industry workforce population may be a biased, given that some women may not always identify themselves as seafood industry participants (see Table 15). In addition, the limitation in collecting gender-disaggregated data in only some sectors of the seafood industry, for example the absence of the seafood retail sector, likely underestimates women's participation and contribution to the industry (Szymkowiak 2020).

Further analysis and data linkage of the Census data on seafood industry sectors and workforces with ABS annual labour force statistics and ATO STP employee statistics is recommended and is likely to improve the reliability and representativeness of population data on the seafood industry workforce and women's participation.

The WISA 2021 Survey has generated a baseline dataset of women's participation, roles, perceptions and experiences of working in the Australian seafood industry. The sample size achieved was large but cannot be regarded as statistically representative of the population of women in the seafood industry. It can, however, be regarded as inclusive of the responses of a wide range of women in all major sectors and types of roles. The underrepresentation of women in some occupational roles (for example, seafood processing, Table 7) is in itself an informative finding and indicates where there is further work for groups such as WISA to target their engagement to ensure more comprehensive representation of women in the seafood industry.

Repeating the WISA Survey in 2026 and every 5 years would create an informative timeseries to track the seafood industry's progress in achieving a more equitable, inclusive and diverse workforce. In doing so, it is also recommended that the design of questions be reviewed. Comparison of survey responses to positively worded statements compared to negatively worded statements in the 2021 survey indicates that in some cases higher levels of agreement are found when responding to a positively-worded statements, indicating a potential source of bias which warrants investigation.

## 7. RECOMMENDATIONS

### **Recommendations for WISA:**

- Identify gaps in knowledge and findings from this research, and seek funding for future research to understand the contributions and challenges of women from cohorts not uncovered adequately in this project.

### **Recommendations for employers and organisations:**

- Apply a gender lens, for example to policy making, organisation's strategic plans, research priorities, extension programs, and employment and recruitment processes, to strengthen understanding of how social norms, systemic barriers, and interpersonal dynamics interact at workplaces.
- Leaders to generate awareness of the value of changing culture, linked to the organisations core values in an authentic way. Leaders need to publicly reject norms and behaviours that

exclude women and other minority groups, empower people to speak up, and model and reward desirable behaviours.

**Recommendations for improving data on women in the Australian seafood industry:**

- Further analysis and data linkage of the Census data on seafood industry sectors and workforces with ABS annual labour force statistics and ATO STP employee statistics is recommended and is likely to improve the reliability and representativeness of population data on the seafood industry workforce and women's participation.
- Repeating the WISA Survey in 2026 and every 5 years would create an informative timeseries to track the seafood industry's progress in achieving a more equitable, inclusive and diverse workforce. In doing so, it is also recommended that the design of questions be reviewed. Comparison of survey responses to positively worded statements compared to negatively worded statements in the 2021 survey indicates that in some cases higher levels of agreement are found when responding to a positively-worded statements, indicating a potential source of bias which warrants investigation.

## APPENDICES

### APPENDIX 1. LITERATURE REVIEW

Table A1a. International and Australian literature summary on the participation and roles of women in the different sectors of the seafood industry

*Note: Australian literature is coloured red*

Sector	Participation and roles of women	References
<b>Fishing</b>	<i>Participation</i>	
	Globally 12%	(FAO 2020)
	Marine - Globally 15% are women	(FAO 2014)
	Inland - Globally >20% are women	(FAO 2014)
	Australia - 19.5 % are women (in 2011)	(ABARES 2015)
	9% of women who identified as working in the seafood industry contributed to a fishing family business (in 2011)	(ABARES 2015)
	<i>Roles</i>	
	Women are rare onboard fishing vessels in developed countries	(Monfort 2015; Frangouades and Gerrard 2019; Zhao et al. 2013)
	Few women are boat/quota owners	(Frangouades and Gerrard 2019; <b>Stella 1998</b> )
	<b>Few women skipper (WA case study)</b>	<b>(Stella 1998)</b>
	Women crew roles were mainly cooking and cleaning, and jobs such as shucking and grading fish	<b>(Stella 1998)</b>
	Fewer women working as crew in the 1990s than the 1980s (WA case study)	
	Women can be excluded from fishing vessels because of cultural taboos, e.g. bringing bad luck	(Frangouades and Gerrard 2019)
	Women who are onboard vessels fished at locations/time of year when it was safer (Alaska) and are less involved in offshore and long-distance fishing	(Szymkowiak 2020; FAO 2020)

Sector	Participation and roles of women	References
	Women onboard vessels tended to come from fishing families (Alaska, UK, <b>Australia</b> ) <b>Many women from fishing families have worked on the family fishing vessel at some point (WA case study)</b>	(Szymkowiak 2020; Zhao et al. 2013; <b>Stella 1998</b> )
	Women tended to stop fishing once they had children (Alaska, <b>Australia</b> )	(Szymkowiak 2020; <b>Stella 1998</b> )
	Women are often very involved in the fishing family business as a key support to men at sea, allowing spouses to concentrate on fishing	(Monfort 2015; Frangoudes and Gerrard 2019; <b>Lambeth et al. 2002</b> )
	Women involved in fishing family businesses are often unpaid, and may be perceived as part of the household duties. Women may not be recognised formally as employees, or documented as a partner in the business	(Monfort 2015; Frangoudes and Gerrard 2019; Szymkowiak 2020; Zhao et al. 2013; <b>Stella 1998; Shaw, Stocker, and Noble 2015; Schirmer 2005</b> )
	Women's roles in the fishing family business are multiple and varied, including as company partners, managing the business (finances, reporting/compliance, crew/staff management, marketing), being the communication link, managing correspondence and bureaucracy, and practical back-up (net mending, boat cleaning, preparing bait, errands), engaging in political processes, organising community events	(Monfort 2015; Frangoudes and Gerrard 2019; Szymkowiak 2020; Zhao et al. 2013; <b>Miller 1997; Shaw, Stocker, and Noble 2015; Schirmer 2005; Lambeth et al. 2002; Aslin, Webb, and Fisher 2000; Stella 1998</b> )
	Women in fishing families may subsidise fishing activities through their earnings	(Monfort 2015; Szymkowiak 2020; Zhao et al. 2013)
	Women in fishing families stabilise and maintain the household through doing the majority of household labour and finances	<b>(Stella 1998; Miller 1997; Monfort 2015; Szymkowiak 2020)</b>
	<b>Women take on an 'emotional labour' in worrying about their spouse while at sea, and many spoke of loneliness (especially in isolated rural communities) (WA case study)</b>	<b>(Stella 1998)</b>
	<b>Even when women have very little to do with the fishing family business, the fisherman's occupation still structures women's lives (WA case study)</b>	<b>(Stella 1998)</b>
	Women's engagement and roles in the fishing family business can be dynamic	(Szymkowiak 2020)
	<b>Women's involvement in fishing family businesses are largely unrecognised</b>	<b>(Lambeth et al. 2002)</b>
	Often women in fishing families do not recognise their own contribution	(Zhao et al. 2013)
<b>Aquaculture</b>	<b>Participation</b>	
	Globally 19%	(FAO 2020)

Sector	Participation and roles of women	References
	Australia 23.3 % are women (in 2011)	(ABARES 2015)
	<b>Roles</b>	
	There is little analysis of developed country aquaculture and gender compared to detailed analysis of developing countries	(Monfort 2015)
	Globally, women tend to be at the lower end of the pay scale and their work is more insecure than men	(Brugere and Williams 2017; Kruijssen, Mcdougall, and Asseldonk 2018)
<b>Processing</b>	<b>Participation</b>	
	Globally up to 85% - 90% are women, but lower in developed countries (no statistics found)	(Briceno-Lagos and Monfort 2018; World Bank 2012)
	Processing is the sector where women's participation tends to be highest	(Monfort 2015; Frangoudes and Gerrard 2019; Kruijssen, Mcdougall, and Asseldonk 2018)
	Participation is highly variable by country	(World Bank 2012)
	41.5% are women (in 2011)	(ABARES 2015)
	<b>Roles</b>	
	Women are considered to be suitable for processing because they are trustworthy, dedicated, meticulous, flexible, compliant, quality-minded, productive and efficient	(Monfort 2015)
	Jobs in processing were casual and fluctuated according to the amount of product and seasonality. More so for women when compared to men. Male workers were more likely to be employed in between seasons and graduate to permanent employment than women. (WA case study)	(Stella 1998)
	Women in processing tend to have the unskilled/manual, lower paid and hierarchically lower jobs. There are 'men's jobs' and 'women's jobs'. Women doing manual processing of seafood and men doing other labour such as loading and unloading trucks, moving product around using the forklift, maintaining and keep an eye on the machines, and dominated management roles. There was a perception that the men 'refused' to do the 'women's work' of handling the seafood. (WA case study)	(Stella 1998; Monfort 2015; Frangoudes and Gerrard 2019; Zhao et al. 2013)
	Women with low education levels and migrant women are often in processing jobs (Europe). Most of the women in processing had little training or formal education. Processing jobs were not desirable, locals did not work there, and there was a high turnover of staff. The majority of women	(Stella 1998; Frangoudes and Gerrard 2019; Zhao et al. 2013)

Sector	Participation and roles of women	References
	<p>were working class, and recent migrants from non-English speaking backgrounds with limited work opportunities. Migrant worker networks enabled job opportunities in processing. 1994 WA Dept of Employment and Training estimated that 65% of seafood processors were migrant women. Some of the processor workers were itinerant workers or travellers. (WA case study)</p>	
	<p>Women in processing were reported to show low confidence and ambition (England)</p> <p>Women in processing would like more training and education opportunities (England)</p>	<p>(Zhao et al. 2013)</p> <p>(Zhao et al. 2013)</p>
Trading	<p><i>Participation</i></p>	
	<p>Fragmented data indicate that women are significantly involved in the selling/trading sector</p> <p><b>31.6% in wholesaling are women (in 2011)</b></p>	<p>(Monfort 2015)</p> <p>(ABARES 2015)</p>
	<p><i>Roles</i></p>	
	<p>Women tend to be more involved in retail or small-scale seafood trading compared to the fish markets</p>	<p>(Zhao et al. 2013)</p>
	<p>Working hours of sub sectors of the seafood trading sector can exclude women because of family responsibilities (England)</p>	<p>(Zhao et al. 2013)</p>
Industry associations	<p><i>Participation</i></p>	
	<p>No data but women are poorly represented at national, regional and local levels in professional associations</p>	<p>(Monfort 2015)</p>
	<p><b>Poor representation of women on industry associations and decision-making bodies</b></p>	<p>(Aslin, Webb, and Fisher 2000)</p>
	<p><i>Roles</i></p>	
	<p>Women tend to be excluded, even from membership of professional organisations, and decisions are made disregarding women's views</p>	<p>(Monfort 2015)</p>
Government agencies	<p><i>Participation</i></p>	
	<p>No data but indications that representation of women in government agencies is high</p>	<p>(Monfort 2015)</p>
	<p><b>Good representation at managerial level in AFMA</b></p>	<p>(Aslin, Webb, and Fisher 2000)</p>
	<p><i>Roles</i></p>	

Sector	Participation and roles of women	References
	Women tended to be more present in administrative and lower hierarchical roles in the government fisheries agency (England)	(Zhao et al. 2013)
Consulting services	<i>Participation</i>	
	No data	
	<i>Roles</i>	
	No data	
Non-government organisations (NGOs)	<i>Participation</i>	
	No data but women are present and visible in environmental NGOs, with examples of gender balance given (e.g. David Suzuki Foundation, Marine Stewardship Council)	(Monfort 2015)
	Better representation of women in NGOs than other sectors	(Aslin, Webb, and Fisher 2000)
	<i>Roles</i>	
University	<i>Participation</i>	
	No data but women are obvious and present in fisheries and aquaculture research but participation level and roles are not clear	(Monfort 2015)
	<b>Women are well represented in the social sciences</b>	<b>(Noble, Mantilla, and Gallagher 2017)</b>
	<i>Roles</i>	
	One study showed that 20% of professional staff were women at an Aquaculture institute, while women dominated in the technical and administrative roles (Scotland)	(Monfort 2015)

Table A1b. Australian research on the participation and roles of women in the Australian seafood industry

Study	Sector	Topic
(Stella 1998)	Fishing	An anthropological case-study PhD thesis
	Processing	looking at women's roles and the gendered division of labour
(Aslin, Webb, and Fisher 2000)	Seafood industry	Interviews (n=20) and survey (n=367) with women in the seafood industry
(Lambeth et al. 2002)	Seafood industry	Brief literature review of women's roles in fisheries by country in Oceania
(Dowling 2011)	Fishing	Explores the invisibility of women, their contributions and the barriers for greater participation
	Aquaculture	
(Shaw, Stocker, and Noble 2015)	Fishing	One case study of the contribution of women to the fishing industry, and the results of their invisibility
(ABARES 2015)	Fishing	Diversity in the workforce, including gender using 2011 ABS data
	Aquaculture	
	Seafood processing	
	Seafood trade (wholesale)	
(Noble, Mantilla, and Gallagher 2017)	Seafood industry	Survey (n=356) including questions about attitudes and perceptions of women in the industry

## APPENDIX 2. KEY INFORMANT INTERVIEW GUIDE

### Project explanation

This project aims to understand the level of participation and the roles women play in the Australian Seafood industry across all sectors, from fishing and aquaculture along the supply chain (wholesale, processing) to retail, and to allied sectors such as research and development (academic/consultancy/NGO), government agencies and industry associations.

Until this project we have virtually no data on women's participation, what they do and who they are, except that we know women play a significant role in the industry. We have some statistics from the census (e.g. estimated 20% in fishing and aquaculture), but very little for all sectors. Very few developed countries in the world have data on women in the seafood industry, so this project on Australian women is of interest internationally.

Women in Seafood Australia have funded this project, through the FRDC. One reason why it is important to identify the women in the seafood industry is that, without this understanding, women are often ignored when it comes to the government or industry itself making decisions, and the impacts on women are not known or considered. Another reason is that issues facing women in the seafood industry across all sectors is simply not reported. This study will help WISA advocate for all women in the seafood industry.

- You have been invited to participate in this interview because of your expertise in your sector
- This interview will probably take about 1 hour
- I would like to record the interview so that I can accurately record your views
- The interview is confidential and your name or any identifying features will not be public
- I will secure your interview on a password protect computer, and only I will see it
- Your involvement is voluntary and there are no consequences to you if you don't want to participate or want to stop at any time
- Your anonymised data will be analysed and presented in a publicly available report to WISA and FRDC
- We would like to know if you would be okay for WISA to use your anonymised data in future projects

In this interview, I will be asking you questions about your experience in your sector and also about your sector as a whole. Questions will include topics on:

Your experience in the sector you work in

- Your experience of being a women in the sector when you entered
- Differences to other industries or sectors you have worked in
- Any changes you have seen over time

The level of participation and roles of women in your sector

- What are the roles that women have in your sector?
- Are women in some occupations or roles and not others, and why is this?
- Have you seen changes in the jobs that women do over your time in your sector?
- Is there equal representation of men and women in management/leadership positions in your sector and why/why not?
- Do women have equal opportunities as men to progress in your sector?
- Do you see women's roles changing in the future in your sector?

Who are the women in your sector

- Background of women in your sector (age, education, ethnicity)
- Changes over time

Job security

- Are the differences between men and women in the level of casualisation/seasonal work
- Impacts of COVID19 on women in your sector

Opportunity to raise any issues facing women in your sector not discussed

### **Key Informant interview question guide**

Consent to interview

Consent to record

Consent to use data in future projects

### **PERSONAL EXPERIENCE**

#### 1. Interviewee information

Name	
Location	
Gender	
Age	
Sector	
Organisation name	
Organisation size	
Role/occupation	

#### 2. Interviewee expertise/sphere of knowledge

- a. Years of experience in sector? Other work experience in other industries or sectors?
- b. How do you engage in your sector more broadly? *i.e. via business connections/leadership positions/board positions*
- c. What parts of the seafood industry do you feel you have knowledge of to speak to today?
  - Sector?
  - Region (local/state/country)?
  - Defined by size of organisation?

- Defined by product/type of org?

3. Given your sphere of knowledge (from previous question), how many businesses/organisations in your sector are you aware of?
4. Is the role and/or experiences of women in your sector, something you have thought about or engaged in before? How so?
5. When you entered the seafood industry, did you have any expectations of how women would be treated? What was the experience like?  
*Prompt: How is the seafood industry/sector different to other industries/sectors you have worked in? Was your experience different to women entering the sector now?*
6. What do you think would be the percentage of women in your sector overall (given your sphere of knowledge)?
  - How confident are you in this response?
7. Can you describe, in general, the roles women play in your sector?
8. From your knowledge of your organisation and others in your sector, can you please
  - a. List the key occupation areas in your sector and
  - b. Whether the occupation is male/female dominated or equal?
  - c. How confident are you in your response?

<b>Census category prompts</b>
Managers (e.g. CEOs, farm managers, Advertising, Sales, PR, HR, Finance, IT, managers)
Professionals (e.g. HR, marketing, accounting, training, sales, engineering, scientists, academics, lawyers)
Technicians & trades (e.g. scientific, IT, ag, mechanic, chefs)
Community & personal services (e.g. hospitality)
Clerical & administrative (e.g. office workers, secretaries, clerks, bookkeepers, logistics)
Sales (e.g. sales reps, agents, auctioneers)
Machinery operators & drivers
Labourers (e.g. cleaners, food processing, packers, ag workers, food prep, freight handlers)

<b>Occupations listed by interviewee</b>	<b>Female dominated</b>	<b>Male dominated</b>	<b>Equal</b>

9. Is there any unpaid work in your sector? Is this done by women or men?
  - *Can you tell me more about the circumstances this unpaid work happens in?*
10. Have you seen the roles/occupations that women do, change over time in your sector? I.e. are women moving into different roles?
  - If so, in what ways?
  - Do you see the roles of women changing in the future?
11. Using question 8 responses, why do you think women are in some occupations and not others?
  - *Are there some occupations that suit women better than others and why?*
  - *Are there some occupations that exclude women and why?*
12. Using question 8 responses, why do you think there are more men/women or equal participation in management/leadership roles?
  - *Do you feel women are considered for these roles equally to men?*
  - *Do you feel that women have equal opportunity for promotions? Why/why not?*
  - *Are women putting themselves forward?*
  - *Is there something that holds women back/pushes them forward?*
  - *Has this changed over time?*
13. Are there any other ways where you feel men and women are treated differently to men in your sector?
14. Have there been any changes in the background of women who work in your sector in terms of
  - a) education
  - b) age
  - c) ethnicityWhat are the implications (positive or negative) of these changes for your sector?
15. What is the level of casualisation/job security in your sector?
  - *Are there some occupations which have been less secure than others?*
  - *Does this affect men and women differently?*
16. What has been the impact of COVID on your sector?
  - Have the impacts been different for men and women?
17. WISA do leadership courses, women's networking events, IWD events, mental health advocacy, links to resources e.g. funding.
  - Do you think women in your sector would be interested in joining or being engaged in WISA activities?
  - Why/why not?
  - What are the needs of different women in your sector?
  - What sort of activities or projects would engage women in your sector?
18. Are there any specific issues that women in your sector face that we haven't talked about that you would like to raise?

## APPENDIX 3. ONLINE SURVEY

This survey seeks to find out about the women who work IN or WITH the Australian Seafood Industry - the roles women play, who the women are, their job conditions and some of the challenges faced.

**All women are qualified to participate in the survey.** This includes women who's work with the seafood industry is in a support role or part time. It includes women who work directly in the industry and women who work in a sector that is allied to, or services the industry.

**We also encourage men to complete the survey.** It is important we are able to get the views of all of industry and compare men's perspectives to women's

The survey will take approximately **10 minutes**

If you agree to do the survey, it is confidential. No information about you will be reported in a way that would allow you to be identified. Only aggregated data will be reported.

This survey is led by Women in Seafood Australasia (WISA). WISA are a not-for-profit organisation representing women who work in and with the seafood industry.

The project is funded by the Fisheries Research Development Corporation (FRDC) (project 2018-174).

The research is being conducted by Dr Kirsten Abernethy and Dr Emily Ogier. If you have any questions about the survey, or the research, please contact [kirsten.abernethy@gmail.com](mailto:kirsten.abernethy@gmail.com)

Thank you for participating in our survey.

### Your work

1. How many years have you worked in or with the Australian seafood industry for?

- 0-2 years
- 3-5 years
- 6-10 years
- 11-15 years
- More than 15 years

2. What sector of the seafood industry do you currently work in?

*Choose only one*

*If you work in more than one sector of the seafood industry, or your business is integrated (across sectors), please specify the **main** sector of your work or describe in 'other'.*

- Commercial fishing
- Aquaculture
- Seafood processing
- Seafood wholesale
- Seafood retailing
- Industry representative associations
- Consulting services (e.g. research, technical, development)
- Government
- University

- OTHER  
If the answers provided do not describe your sector or business, please enter description here .....

3. Which one role best describes your work?  
(Response categories specific to sector indicated in Q2)
4. What size is the organisation you work for?
  - Just me
  - Less than 5 people
  - Between 5 and 20 people
  - More than 20 people
5. Where is your place of work?
  - Victoria
  - New South Wales
  - Tasmania
  - Western Australia
  - Northern Territory
  - ACT
  - Queensland
  - South Australia
  - Other (please specify) .....
6. Is your place of work in the city or regional?  
*i.e. where your organisation is based or operates from*
  - City
  - Regional
7. What percentage of the workforce in your business or organisation are women?  
*Please estimate based on the sector you selected at the start of the survey*  
(Response is sliding scale)
8. Is this percentage typical of other similar businesses/organisations in your sector?  
*Please answer based on the sector you selected at the start of the survey*
  - Yes
  - No, there are more women in other similar businesses/organisations
  - No, there are less women in other similar businesses/organisations
  - I don't know
9. What best describes your status in the organisation you work in
  - I own/co-own my business
  - I work for an employer full time
  - I work for an employer part time
  - I work for an employer casually
  - I am a contributing family worker – paid
  - I am a contributing family worker – unpaid
  - Other (please specify) .....

10. Is the business you work in a 'family business'?

*i.e. where multiple members of the family work in the business and have majority control or ownership*

- Yes
- No
- I don't know

11. Is the boss of your organisation/business female or male?

- Female
- Male
- Not applicable
- I don't know
- Other (please specify) .....

12. What percentage of your total work is in or with the seafood industry?

*i.e. compared to work outside the seafood industry*

.....

13. In the recent 2021 census, did you identify as working in 'the seafood industry' as your industry of employment?

- Yes
- No
- I don't know

#### **About you**

14. Gender: How do you identify?

- Woman
- Man (Logic to Q32)
- Non-binary
- Prefer to self describe .....

15. What is your age?

- Under 20 years
- 20-39 years
- 40-59 years
- 60-79 years
- 80 years and over

16. Which country were you born?

(Response from dropdown list of all countries)

17. Do you speak any language other than English at home?

- No
- Yes

18. Are you of Aboriginal or Torres Strait Islander origin?

- No
- Yes, Aboriginal
- Yes, Torres Strait Islander
- Yes, both Aboriginal and Torres Strait Islander

19. Do you have caring responsibilities that can impact your work?

*e.g. children at home, caring for parents*

- Yes
- No

20. What is the level of the highest qualification you have completed?

- Secondary education - Yr 9 and below
- Secondary education - Yr 10 and above
- Certificate
- Diploma or advanced diploma
- Bachelor degree
- Postgraduate degree
- Other (please specify)

### **What do women need to succeed in the Australian Seafood Industry?**

PLEASE READ before you complete this section

This section is all about your personal experiences as a woman while working in or with the seafood industry.

These may be experiences at your place of work or your direct experiences in your working environment when working with people in or associated with the seafood industry

(Questions in this section were randomised)

21. I worry about job security

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

22. There is sexual harassment of women at my workplace or in my work environment

*e.g. unwelcome comments, jokes, pictures, staring, physical contact, sexual requests, intrusive questions*

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

23. Disrespectful behaviour is quickly addressed at my workplace or in my work environment

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

24. Compared to men, I am not taken seriously when I offer an opinion or make a suggestion at work *e.g. at a meeting*

- Strongly agree
- Agree
- Neither agree nor disagree

- Disagree
- Strongly disagree

25. Women are treated with respect at my workplace or in my work environment

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

26. I feel like my skills and experience are undervalued compared to the men in my workplace or in my work environment

- Always
- Usually
- Sometimes
- Rarely
- Never

27. My workplace or work environment has a culture that is inclusive of women

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

28. Men have greater access to people who can champion them in their career than women do at my workplace or in my work environment

- Always
- Usually
- Sometimes
- Rarely
- Never

29. My job gives me the flexibility I need to manage my work and home life

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

30. If I have a particular problem at work, there is someone at work I can speak openly about it with

- Always
- Usually
- Sometimes
- Rarely
- Never

31. I have the same chance for promotion or get a leadership role as the men in my workplace or in my work environment

- Strongly agree
- Agree

- Neither agree nor disagree
- Disagree
- Strongly disagree

**Women and the Australian Seafood Industry.**

PLEASE READ before you complete this section

In this section you are asked about your general perceptions and observations about the Australian Seafood Industry overall

(Questions in this section were randomised)

32. Women are treated with respect in the Australian seafood industry

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

33. The contributions of women are valued in the Australian seafood industry

- Always
- Usually
- Sometimes
- Rarely
- Never

34. The culture of the Australian seafood industry is inclusive of women

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

35. Women are championed by industry leaders in the Australian seafood industry

- Always
- Usually
- Sometimes
- Rarely
- Never

36. Women have equal chance of promotion and leadership roles as men in the Australian seafood industry

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

37. Having a family can have a negative impact on a women's career progression compared to men in the Australian seafood industry

- Strongly agree
- Agree
- Neither agree nor disagree

- Disagree
- Strongly disagree

38. Women choose a more balanced lifestyle over career progression in the Australian seafood industry

- Always
- Usually
- Sometimes
- Rarely
- Never

39. Women undersell their experience and capabilities

- Always
- Usually
- Sometimes
- Rarely
- Never

40. Some leadership teams do not value the different perspectives that women bring to the team

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

41. What do you think could help women succeed in the Australian Seafood industry?

.....

42. Do you want to make any further comments about the experiences of women in your workplace, work environment, or in the Australian seafood industry?

.....

### **Women working together.**

WISA (Women in Seafood Australasia) is the national organisation advocating and supporting women in the Seafood Industry.

This section asks questions about if and how you might like to engage and learn from women in the Australian Seafood Industry.

43. How interested are you in engaging with and learning about women in the Australian seafood industry?

- Very interested
- Somewhat interested
- Not interested (Logic to Q48)

44. Who would you most like to engage and learn with?

- All women who work in and with the Australian seafood industry
- Women who work in the same sector or do similar work as me
- Women in the same geographical area as me
- Other (please specify) .....

45. What would you most like to engage and learn about?

- I would like to meet and find out about women and what they do in the industry

- I would like to discuss or learn about particular issues and topics
- I would like to be part of a small network of women that support each other
- Other (please specify) .....

46. What issues or topics are you interested to discuss or learn about?

.....

47. How would you prefer to engage or learn with other women in seafood?

- Online video (e.g. Zoom)
- Online chat group (e.g. Facebook closed group)
- In-person events (e.g. coffee meet ups, breakfasts, meetings)
- Other (please specify) .....

### **Stay in touch**

48. Would you be interested in staying in contact?

*(you can tick more than one)*

- I would like to receive a summary of the findings from this survey
- I would like to receive news and information about WISA
- I would be happy to be contacted about future surveys on Women in the Seafood Industry
- No thank you (Logic to end of survey)

### **Contact information**

49. If you selected that you would like to receive a summary of the research findings, news about WISA, or future surveys, please provide your contact details.

We will only email you for the types of contact you selected

Your survey data will remain confidential and anonymised

Name .....

Email .....

## APPENDIX 4. SURVEY RESPONSES BY VARIABLE

Question	"I worry about job security"				"There is sexual harassment of women at my workplace or in my work environment"				"Disrespectful behaviour is quickly addressed at my workplace or in my work environment"			
Response	Strongly agree/ Agree	Neither	Strongly disagree/ Disagree	N	Strongly agree/ Agree	Neither	Strongly disagree/ Disagree	N	Strongly agree/ Agree	Neither	Strongly disagree/ Disagree	N
<b>All</b>												
<b>Women</b>	29.6	19.8	50.5	388	20.4	13.7	66.0	388	61.6	20.4	18.0	388
<b>Men</b>												
<b>Fishing</b>	33.4	16.7	50.0	66	16.6	13.6	69.7	66	68.2	18.2	13.6	66
<b>Aquaculture</b>	23.9	22.8	53.3	92	15.2	14.1	70.6	92	58.7	26.1	15.2	92
<b>Postharvest</b>	18.5	25.7	55.7	70	22.9	14.3	62.9	70	72.9	5.7	21.4	70
<b>Government</b>	24.6	14.5	60.8	69	30.4	11.6	58.0	69	44.9	30.4	24.6	69
<b>Service sector</b>	46.3	19.5	34.1	82	19.5	15.9	64.6	82	59.8	22.0	18.3	82
<b>Manager</b>	22.9	21.3	55.9	127	22.9	21.3	55.9	70	68.5	18.1	13.4	70
<b>Professionals</b>	33.6	20.1	46.2	134	33.6	20.1	46.2	33	58.2	19.4	22.4	33
<b>Clerical and Admin</b>	34.2	22.9	42.8	70	34.2	22.9	42.8	70	62.9	20.0	17.2	70
<b>Other</b>	29.8	12.3	57.9	57	19.3	14.0	66.7	57	52.6	28.1	19.3	14
<b>City</b>	27.4	22.4	50.3	183	24.1	12.6	63.4	183	58.5	19.7	21.9	183
<b>Regional</b>	31.7	17.6	50.7	205	17.1	14.6	68.3	205	64.4	21.0	14.7	205
<b>0-2 years</b>	23.3	13.3	63.3	60	15.0	15.0	70.0	60	61.6	21.7	16.7	60
<b>3-5 years</b>	33.9	21.0	45.2	62	17.7	14.5	67.8	62	59.7	19.4	20.9	62
<b>6-10 years</b>	32.8	21.9	45.3	64	26.6	15.6	57.9	64	59.4	15.6	25.0	64
<b>11-15 years</b>	36.8	26.5	36.7	49	26.5	20.4	53.1	49	49.0	30.6	20.4	49
<b>Over 15 years</b>	26.8	19.0	54.2	153	18.9	9.8	71.3	153	67.3	19.0	13.7	153
<b>Less than 5 people</b>	38.1	19.6	42.3	100	19.5	10.1	73.5		59.8	23.7	16.5	97
<b>5-20 people</b>	26.4	16.7	56.9	72	12.5	8.3	79.2	72	77.8	15.3	7.0	72
<b>more than 20 people</b>	27.0	21.0	52.0	219	22.9	14.6	62.6	219	57.1	20.5	22.3	219
<b>Female boss</b>	32.1	25.0	42.9	56	32.1	7.1	60.7	56	67.9	10.7	21.4	56
<b>Male boss</b>	29.2	18.1	52.7	277	20.2	14.8	65.0	277	60.6	20.6	18.8	277
<b>Family business</b>	29.6	19.0	51.4	142	16.9	12.0	71.1	142	69.7	16.9	13.3	142
<b>Not family business</b>	29.3	20.2	50.4	242	22.4	14.9	62.8	242	57.4	22.3	20.2	242

Question	"Compared to men, I am not taken seriously when I offer an opinion or make a suggestion at work"				"Women are treated with respect at my workplace or in my sector"				"Women are treated with respect in the Australian seafood industry"			
Response	Strongly agree/ Agree	Neither	Strongly disagree/ Disagree	N	Strongly agree/ Agree	Neither	Strongly disagree/ Disagree	N	Strongly agree/ Agree	Neither	Strongly disagree/ Disagree	N
<b>All</b>									51.1	33.3	15.6	478
<b>Women</b>	27.3	20.4	52.3	388	81.7	12.4	6.0	388	46.5	35.8	17.7	374
<b>Men</b>									67.3	24.0	8.7	104
<b>Fishing</b>	21.2	19.7	59.1	66	80.3	16.7	3.0	66	60.0	27.7	12.3	65
<b>Aquaculture</b>	28.3	22.8	48.9	92	81.6	12.0	6.5	92	52.8	35.2	12.1	91
<b>Postharvest</b>	25.7	11.4	62.9	70	81.5	10.0	8.5	70	46.3	32.8	20.9	67
<b>Government</b>	29.0	24.6	46.4	69	81.1	14.5	4.3	69	37.5	35.9	26.6	64
<b>Service sector</b>	32.9	23.2	43.9	82	81.7	11.0	7.3	82	32.9	46.8	20.3	79
<b>Manager</b>	29.1	18.1	52.8	70	80.3	13.4	6.3	70	51.2	34.5	14.2	119
<b>Professionals</b>	29.1	23.1	47.8	33	85.0	7.5	7.5	33	38.9	37.4	23.7	131
<b>Clerical and Admin</b>	15.8	20.0	64.3	70	85.7	12.9	1.4	70	56.8	29.9	13.4	67
<b>Other</b>	33.3	19.3	47.4	14	71.9	21.1	7.0	57	42.1	42.1	15.8	57
<b>City</b>	28.9	18.0	53.0	183	83.0	10.4	6.6	183	41.0	35.8	23.2	173
<b>Regional</b>	25.9	22.4	51.7	205	80.5	14.1	5.4	205	51.3	35.8	12.9	201
<b>0-2 years</b>	15.0	23.3	61.7	60	83.4	13.3	3.3	60	43.8	33.3	22.8	57
<b>3-5 years</b>	38.7	12.9	48.4	62	85.5	9.7	4.8	62	57.3	31.1	11.4	61
<b>6-10 years</b>	25.0	21.9	53.2	64	76.6	10.9	12.5	64	45.1	32.3	22.6	62
<b>11-15 years</b>	42.9	26.5	30.6	49	65.3	18.4	16.3	49	38.8	38.8	22.4	49
<b>Over 15 years</b>	23.5	19.6	56.8	153	86.9	11.8	1.4	153	46.2	39.3	14.5	158
<b>Less than 5 people</b>	27.8	20.6	51.5	97	80.4	15.5	4.1	97	56.0	26.9	17.3	93
<b>5-20 people</b>	20.8	13.9	65.3	72	87.5	8.3	4.2	72	47.1	40.0	12.9	70
<b>more than 20 people</b>	29.2	22.4	48.4	219	80.4	12.3	7.3	219	42.2	38.4	19.4	211
<b>Female boss</b>	28.6	26.8	44.6	56	83.9	10.7	5.4	56	39.3	41.1	19.6	56
<b>Male boss</b>	27.1	18.8	54.1	277	82.6	10.8	6.5	277	45.8	36.4	17.8	264
<b>Family business</b>	22.5	18.3	59.1	142	81.7	12.7	5.6	142	55.1	29.7	15.2	138
<b>Not family business</b>	30.1	21.1	48.8	242	82.2	11.6	6.2	242	40.9	39.7	19.4	232

Question	"I feel like my skills and experience are undervalued compared to the men in my workplace or sector"				"The contribution of women is valued in the Australian seafood industry"				"My workplace or sector has a culture that is inclusive of women"			
Response	Always/ Usually	Sometimes	Rarely/ Never	N	Always/ Usually	Sometimes	Rarely/ Never	N	Strongly agree/ Agree	Neither	Strongly disagree/ Disagree	N
<b>All</b>					51.1	33.3	15.6	478				
<b>Women</b>	27.1	30.4	42.5	388	49.5	42.8	7.8	374	70.1	17.0	12.9	388
<b>Men</b>					70.2	25.0	4.8	104				
<b>Fishing</b>	22.7	24.2	53.0	66	55.4	36.9	7.7	65	68.2	22.7	9.1	66
<b>Aquaculture</b>	28.3	34.8	36.9	92	57.2	36.3	6.6	91	68.4	20.7	10.9	92
<b>Postharvest</b>	32.9	20.0	47.2	70	56.7	34.3	9.0	67	68.6	12.9	18.6	70
<b>Government</b>	28.9	27.5	43.4	69	35.9	57.8	6.3	64	68.1	17.4	14.4	69
<b>Service sector</b>	24.4	43.9	31.7	82	38.0	53.2	8.9	79	74.4	13.4	12.2	82
<b>Manager</b>	30.7	26.8	42.5	70	56.3	37.0	6.7	119	74.0	15.0	11.0	70
<b>Professionals</b>	23.9	32.8	43.2	33	39.7	49.6	10.7	131	70.9	14.9	14.2	33
<b>Clerical and Admin</b>	20.0	35.7	44.3	70	55.2	41.8	3.0	67	65.7	22.9	11.4	70
<b>Other</b>	35.1	26.3	38.6	57	50.9	40.4	8.8	57	64.9	19.3	15.8	57
<b>City</b>	23.5	31.7	44.9	183	44.5	46.2	9.3	173	71.1	16.4	12.6	183
<b>Regional</b>	30.3	29.3	40.5	205	53.8	39.8	6.5	201	69.3	17.6	13.1	205
<b>0-2 years</b>	20.0	23.3	56.6	60	43.8	42.1	14.0	57	70.0	18.3	11.7	60
<b>3-5 years</b>	33.9	21.0	45.2	62	57.4	36.1	6.6	61	69.4	21.0	9.7	62
<b>6-10 years</b>	39.1	25.0	35.9	64	50.0	41.9	8.1	62	65.6	17.2	17.2	64
<b>11-15 years</b>	28.6	40.8	30.6	49	40.8	49.0	10.2	49	65.3	18.4	16.3	49
<b>Over 15 years</b>	21.6	35.9	42.5	153	51.1	44.1	4.8	145	73.8	14.4	11.8	153
<b>Less than 5 people</b>	25.8	32.0	42.3	97	51.7	43.0	5.4	93	67.0	23.7	9.3	97
<b>5-20 people</b>	22.3	30.6	47.2	72	54.3	38.6	7.1	70	59.4	7.9	4.0	72
<b>more than 20 people</b>	29.2	29.7	41.1	219	46.9	44.1	9.0	211	52.7	12.5	13.3	219
<b>Female boss</b>	35.7	33.9	30.4	56	44.6	46.4	8.9	56	62.8	5.7	11.4	56
<b>Male boss</b>	25.6	30.0	44.4	277	49.6	42.0	8.4	264	52.2	12.4	10.3	277
<b>Family business</b>	24.0	28.2	47.9	142	57.3	35.5	7.2	138	71.1	18.3	10.6	142
<b>Not family business</b>	28.9	31.4	39.6	242	45.3	46.6	8.2	232	70.2	15.7	14.1	242

Question	"The culture of the Australian seafood industry is inclusive of women"				"Some leadership teams do not value the different perspectives that women bring to the team"				"Men have greater access to people who can champion them in their career than women do at my workplace or sector"			
Response	Strongly agree/ Agree	Neither	Strongly disagree/ Disagree	N	Strongly agree/ Agree	Neither	Strongly disagree/ Disagree	N	Always/ Usually	Sometimes	Rarely/ Never	N
<b>All</b>	37.6	35.4	27.0	478	52.7	29.3	18.0	478				
<b>Women</b>	35.5	35.3	29.1	374	55.9	28.6	15.5	374	41.0	30.2	28.9	388
<b>Men</b>	45.2	35.6	19.2	104	41.3	31.7	27.0	104				
<b>Fishing</b>	49.2	32.3	18.4	65	46.2	30.8	23.1	65	43.9	31.8	24.2	66
<b>Aquaculture</b>	36.3	39.6	24.2	91	55.0	30.8	14.3	91	36.9	28.3	34.8	92
<b>Postharvest</b>	43.3	31.3	25.4	67	49.2	34.3	16.4	67	48.6	22.9	28.6	70
<b>Government</b>	18.8	39.1	42.2	64	59.4	25.0	15.6	64	40.5	31.9	27.5	69
<b>Service sector</b>	26.6	35.4	38.0	79	68.3	22.8	8.9	79	37.8	36.6	25.7	82
<b>Manager</b>	42.0	35.3	22.7	119	55.4	27.7	16.8	119	41.0	33.1	26.0	70
<b>Professionals</b>	27.5	29.0	43.5	131	61.8	22.9	15.3	131	41.0	26.9	32.0	33
<b>Clerical and Admin</b>	44.8	40.3	14.9	67	40.3	44.8	14.9	67	38.5	28.6	32.9	70
<b>Other</b>	29.8	43.9	26.4	57	61.4	24.6	14.0	57	43.9	33.3	22.8	14
<b>City</b>	29.5	33.5	37.0	188	57.2	26.6	16.1	173	37.7	30.1	32.2	183
<b>Regional</b>	40.8	36.8	22.4	201	54.8	30.3	14.9	201	43.9	30.2	25.8	205
<b>0-2 years</b>	24.6	35.1	40.4	57	47.3	28.1	24.6	57	31.7	28.3	40.0	60
<b>3-5 years</b>	42.6	41.0	16.4	61	59.1	24.6	16.4	61	43.6	25.8	30.6	62
<b>6-10 years</b>	29.0	30.6	40.4	62	66.1	29.0	4.8	62	34.4	39.1	26.5	64
<b>11-15 years</b>	32.7	32.7	34.7	49	61.3	24.5	14.2	49	59.2	20.4	20.4	49
<b>Over 15 years</b>	40.7	35.9	23.5	145	51.7	31.7	16.6	145	40.5	32.0	27.4	153
<b>Less than 5 people</b>	46.2	34.4	19.4	93	49.4	35.5	15.1	93	36.1	40.2	23.7	97
<b>5-20 people</b>	44.2	37.1	18.6	70	55.7	24.3	20.0	70	40.3	22.2	37.5	72
<b>more than 20 people</b>	27.9	35.1	37.0	211	58.7	27.0	14.2	211	43.4	28.3	28.3	219
<b>Female boss</b>	42.9	28.6	28.6	56	60.7	25.0	14.3	56	35.7	41.1	23.2	56
<b>Male boss</b>	33.0	36.0	31.1	264	56.8	28.8	14.4	264	42.2	30.0	27.8	277
<b>Family business</b>	46.4	31.9	21.8	138	46.3	31.9	21.8	138	71.1	18.3	10.6	142
<b>Not family business</b>	29.7	36.6	33.6	232	61.6	26.3	12.0	232	70.2	15.7	14.1	242

Question	"Women are championed by industry leaders in the seafood industry"				"My job gives me the flexibility I need to manage my work and homelife"				"Having a family can have a negative impact on a women's career progression compared to men in the seafood industry"			
Response	Always/ Usually	Sometimes	Rarely/ Never	N	Strongly agree/ Agree	Neither	Strongly disagree/ Disagree	N	Strongly agree/ Agree	Neither	Strongly disagree/ Disagree	N
<b>All</b>	29.1	52.9	18.0	478					66.8	23.4	9.8	478
<b>Women</b>	25.1	54.8	20.1	374	75.3	14.2	10.5	388	71.4	22.7	5.8	374
<b>Men</b>	43.2	46.2	10.6	104					50.0	26.0	24.0	104
<b>Fishing</b>	37.0	49.2	13.8	65	75.8	15.2	9.1	66	60.0	27.7	12.3	65
<b>Aquaculture</b>	20.9	62.6	16.5	91	72.8	16.3	10.8	92	74.7	19.8	5.5	91
<b>Postharvest</b>	34.3	43.3	22.4	67	68.5	18.6	12.8	70	65.7	26.9	7.5	67
<b>Government</b>	17.2	59.4	23.4	64	81.1	7.2	11.6	69	78.1	18.8	3.2	64
<b>Service sector</b>	13.9	60.8	25.3	79	80.5	12.2	7.3	82	76.0	21.5	2.5	79
<b>Manager</b>	34.5	46.2	19.3	119	73.2	16.5	10.2	70	70.6	22.7	6.7	119
<b>Professionals</b>	19.9	55.7	24.5	131	80.6	9.0	10.5	33	80.2	16.8	3.0	131
<b>Clerical and Admin</b>	26.9	59.7	13.4	67	80.0	17.1	2.9	70	55.2	34.3	10.5	67
<b>Other</b>	15.8	64.9	19.3	57	61.4	17.5	21.1	57	71.9	22.8	5.3	57
<b>City</b>	22.0	54.9	23.1	173	78.7	13.1	8.2	183	68.8	25.4	5.7	173
<b>Regional</b>	27.9	54.7	17.4	201	72.2	15.1	12.7	205	73.7	20.4	6.0	201
<b>0-2 years</b>	15.8	56.1	28.1	57	81.7	8.3	10.0	60	59.7	33.3	7.1	57
<b>3-5 years</b>	24.6	57.4	18.0	61	72.6	12.9	14.5	62	68.8	24.6	6.6	61
<b>6-10 years</b>	24.2	56.5	19.4	62	73.5	17.2	9.4	64	80.7	14.5	4.8	62
<b>11-15 years</b>	20.4	53.1	26.5	49	69.3	16.3	14.3	49	79.6	18.4	2.0	49
<b>Over 15 years</b>	31.0	53.1	15.9	145	76.5	15.0	8.5	153	70.4	22.8	6.9	145
<b>Less than 5 people</b>	27.9	53.8	18.3	93	75.3	15.5	9.3	97	71.0	22.6	6.5	93
<b>5-20 people</b>	35.7	48.6	15.7	70	76.4	11.1	12.5	72	64.3	25.7	10.0	70
<b>more than 20 people</b>	20.4	57.3	22.3	211	74.9	14.6	10.5	219	73.9	21.8	4.2	211
<b>Female boss</b>	28.6	50.0	21.4	56	60.0	12.9	7.1	56	73.3	19.6	7.1	56
<b>Male boss</b>	23.1	56.8	20.1	264	57.0	9.5	8.4	277	73.1	22.0	5.0	264
<b>Family business</b>	32.6	52.9	14.5	138	69.7	16.9	13.4	142	66.7	26.1	7.2	138
<b>Not family business</b>	20.7	56.5	22.8	232	79.0	12.4	8.7	242	74.6	20.7	4.8	232

Question	"I have the same chance for promotion or get a leadership role as the men in my workplace or sector"				"Women have equal chance of promotion and leadership roles as men in the seafood industry"				"Women undersell their experience and capabilities"			
Response	Strongly agree/ Agree	Neither	Strongly disagree/ Disagree	N	Strongly agree/ Agree	Neither	Strongly disagree/ Disagree	N	Always/ Usually	Sometimes	Rarely/ Never	N
<b>All</b>					29.5	32.8	37.7	478	58.6	36.0	5.4	478
<b>Women</b>	52.9	23.2	23.9	388	24.6	35.3	40.1	374	65.7	30.5	3.7	374
<b>Men</b>					47.2	24.0	28.9	104	32.7	55.8	11.5	104
<b>Fishing</b>	54.5	30.3	15.1	66	36.9	35.4	27.7	65	61.6	33.8	4.6	65
<b>Aquaculture</b>	50.0	27.2	22.9	92	26.4	36.3	37.4	91	65.9	28.6	5.5	91
<b>Postharvest</b>	57.2	18.6	24.2	70	29.9	35.8	34.4	67	47.7	49.3	3.0	67
<b>Government</b>	52.2	18.8	29.0	69	12.5	35.9	51.6	64	76.6	20.3	3.1	64
<b>Service sector</b>	48.8	22.0	29.3	82	15.2	34.2	50.6	79	77.2	21.5	1.3	79
<b>Manager</b>	63.0	18.9	18.1	70	30.3	34.5	35.3	119	63.0	32.8	4.2	119
<b>Professionals</b>	47.7	21.6	30.6	33	19.1	29.8	51.2	131	71.0	26.0	3.1	131
<b>Clerical and Admin</b>	52.9	25.7	21.5	70	28.4	41.8	29.9	67	62.6	34.3	3.0	67
<b>Other</b>	42.1	33.3	24.6	57	21.1	42.1	36.8	57	63.2	31.6	5.3	57
<b>City</b>	52.5	18.6	29.0	183	20.2	35.3	44.5	173	64.8	31.8	3.5	173
<b>Regional</b>	53.1	27.3	19.6	205	28.4	35.3	36.3	201	66.6	29.4	4.0	201
<b>0-2 years</b>	53.4	28.3	18.3	60	21.0	42.1	36.9	57	64.9	28.1	7.1	57
<b>3-5 years</b>	61.3	16.1	22.6	62	31.2	44.3	24.6	61	60.7	36.1	3.3	61
<b>6-10 years</b>	48.5	18.8	32.8	64	14.5	37.1	48.4	62	67.7	30.6	1.6	62
<b>11-15 years</b>	40.8	18.4	40.9	49	20.4	22.4	57.2	49	77.5	20.4	2.0	49
<b>Over 15 years</b>	54.9	27.5	17.7	153	29.0	32.4	38.6	145	63.4	32.4	4.1	145
<b>Less than 5 people</b>	49.5	30.9	19.6	97	33.3	32.3	34.5	93	62.4	33.3	4.3	93
<b>5-20 people</b>	62.5	22.2	15.3	72	32.9	32.9	34.3	70	77.2	20.0	2.8	70
<b>more than 20 people</b>	51.1	20.1	28.7	219	18.0	37.4	44.6	211	63.5	32.7	3.8	211
<b>Female boss</b>	60.7	14.3	25.0	56	26.8	26.8	46.4	56	66.0	32.1	1.8	56
<b>Male boss</b>	50.2	24.5	25.3	277	21.2	37.9	40.9	264	65.9	30.7	3.5	264
<b>Family business</b>	54.9	25.4	19.7	142	33.3	32.6	34.1	138	61.6	34.1	4.3	138
<b>Not family business</b>	52.1	21.5	26.5	242	19.4	36.2	44.4	232	68.9	27.6	3.5	232

<b>Question</b>	"Women choose a more balanced lifestyle over career progression in the seafood industry"			
<b>Response</b>	Always/ Usually	Sometimes	Rarely/ Never	<i>N</i>
<b>All</b>	33.5	58.2	8.4	<b>478</b>
<b>Women</b>	35.6	55.1	9.4	<b>374</b>
<b>Men</b>	26.0	69.2	4.8	<b>104</b>
<b>Fishing</b>	46.2	44.6	9.2	<b>65</b>
<b>Aquaculture</b>	40.7	52.7	6.6	<b>91</b>
<b>Postharvest</b>	38.8	50.7	10.5	<b>67</b>
<b>Government</b>	35.9	57.8	6.3	<b>64</b>
<b>Service sector</b>	88.7	10.1	1.3	<b>79</b>
<b>Manager</b>	42.0	47.1	10.9	<b>119</b>
<b>Professionals</b>	29.8	58.0	12.2	<b>131</b>
<b>Clerical and Admin</b>	37.3	58.2	4.5	<b>67</b>
<b>Other</b>	33.4	61.4	5.3	<b>57</b>
<b>City</b>	31.7	60.7	7.6	<b>173</b>
<b>Regional</b>	38.8	50.2	11.0	<b>201</b>
<b>0-2 years</b>	22.9	59.6	17.5	<b>57</b>
<b>3-5 years</b>	39.3	54.1	6.5	<b>61</b>
<b>6-10 years</b>	29.0	66.1	4.8	<b>62</b>
<b>11-15 years</b>	40.8	46.9	12.2	<b>49</b>
<b>Over 15 years</b>	40.0	51.7	8.3	<b>145</b>
<b>Less than 5 people</b>	36.6	51.6	11.9	<b>93</b>
<b>5-20 people</b>	45.8	48.6	5.7	<b>70</b>
<b>more than 20 people</b>	31.7	58.8	9.5	<b>211</b>
<b>Female boss</b>	37.5	57.1	5.4	<b>56</b>
<b>Male boss</b>	33.8	56.1	10.2	<b>264</b>
<b>Family business</b>	47.8	41.3	10.8	<b>138</b>
<b>Not family business</b>	28.0	63.8	8.2	<b>232</b>

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