

Supporting underutilised rural women into the food and fibre sector workforce

Market research findings

May 2024



Executive summary

Introduction

MPI recently sponsored a small-scale study exploring the opportunity to formally recognise the skills and knowledge rural women have acquired informally living on-farm with their farming spouse. Scarlatti has been contracted to undertake a two-part analysis to explore this opportunity further starting with a market size analysis, followed by a piece of market research to test the value proposition of programmes that formally recognise the skills rural women have developed. This report presents the findings from the market research analysis.

An [online survey](#) was used to engage with the target cohort who had the following characteristics to collect insights on their aspirations to enter the workforce, their competency at a range of soft and technical skills, and their preferred pathway into the workforce:

- Woman,
- Aged between 18 and 65 years of age,
- In a relationship with someone working in a food and fibre industry, and
- Not currently working full time.

We received 138 responses with 48 aligning with the target cohort criteria. Thirty-four indicated they aspire to enter the workforce soon while 14 do not.

Findings

The findings we draw from the survey's responses that align with the target cohort (48) include:

- Children, time, needing to commute and family were the top four selected barriers rural women face that have prevented them from entering the sector's workforce. Not being aware of the employment opportunities available to them was a close fifth.
- Generally, the respondents that aspire to enter the workforce are highly capable with over 90% of respondents somewhat or very effective in a range of soft but highly transferrable skills, and nearly 70% being somewhat or very effective in business administration related activities. Over 70% of respondents also already hold a formal qualification at some level.
- Over 60% of respondents aspiring to enter the workforce indicated they would prefer to do so by leveraging the formal and informal skills they already have and engage with employers/respond to job advertisements now.
- The remaining 40% aspiring to enter the workforce indicated they prefer/need to engage in formal training first. Barriers that prevented them from engaging with this training included access related barriers (e.g., cost, children, family, and time) and not being aware the training and workforce opportunities available to them.

Implications for designing pathways into the workforce for rural women

From the survey's findings, we identify the following three implications for designing pathways into the workforce for rural women:

1. There are a lot of very talented, skilled, and experienced rural women in the food and fibre sector that are underutilised, although engaging them effectively will be challenging.
2. These women generally lack awareness of the workforce and training opportunities available in the sector. A focus on building awareness of these opportunities may be necessary to generate demand for the workforce pathways before investing too much in their design.
3. Most rural women Scarlatti surveyed would prefer to enter the workforce by leveraging the formal and informal skills they have already developed. These results highlight a potential opportunity to support rural women into the workforce by providing clarity on the recruitment process, instilling self-confidence to approach employers, and working through some tips and tricks to effectively communicate the value of their skills and experience. This pathway may be more effective than designing a pathway that recognises informally developed skills to engage this cohort in the workforce.

We recommend undertaking a series of follow-up interviews with survey respondents to validate these implications, assess the extent to which rural women appreciate the skills they have as an enabler to entering the workforce, and evaluate how effective pathways into the workforce need to be designed.

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Introduction

Context

MPI recently sponsored a small-scale study exploring the opportunity to formally recognise the skills and knowledge rural women have acquired informally via living on-farm with their farming spouse. The outcomes from the study were positive and piqued interest in understanding the market potential (e.g. size and demand) for these types of programmes. Scarlatti has been contracted to undertake a two-part analysis to explore this opportunity further. This involves the following activities:

1. **Market size analysis** to estimate the number of rural women in the target cohort and their relevant characteristics / attributes,
2. **Market research** to test the demand for programmes that recognise the skill sets rural women have developed informally.

The following report presents the findings of the market research analysis.

Target cohort

The market size analysis using IDI data recently concluded there are 59,000 rural women who are currently married to or in a de facto relationship with someone working in the food and fibre sector workforce. Of these women, nearly 15,200 (~25%) are either not employed or are employed casually / part-time in the food and fibre sector workforce themselves – the findings from this analysis can be viewed on the [accompanying dashboard](#).

The 15,200 number was agreed as the cohort that should be targeted during the market research analysis.

Research objectives

The focus of the market research analysis was to engage with as many of the target cohort as possible to better understand:

1. Whether they would like to increase their utilisation in the food and fibre workforce,
2. How competent they are in a series of soft and technical skills generally valued by employers,
3. How their competency has been developed (e.g. formally vs informally),
4. The barriers they have faced previously to engage with training and/or the workforce,
5. Their preferred pathway into the workforce assuming an absence of all barriers.

Where we refer to a respondent's technical competency, we are referring to their ability to administrate an agribusiness as the focus for this work. While we appreciate rural women have a vast range of technical skills, we used business administration as a starting point and asked them to comment on other technical skills they consider themselves capable at separately.

Approach

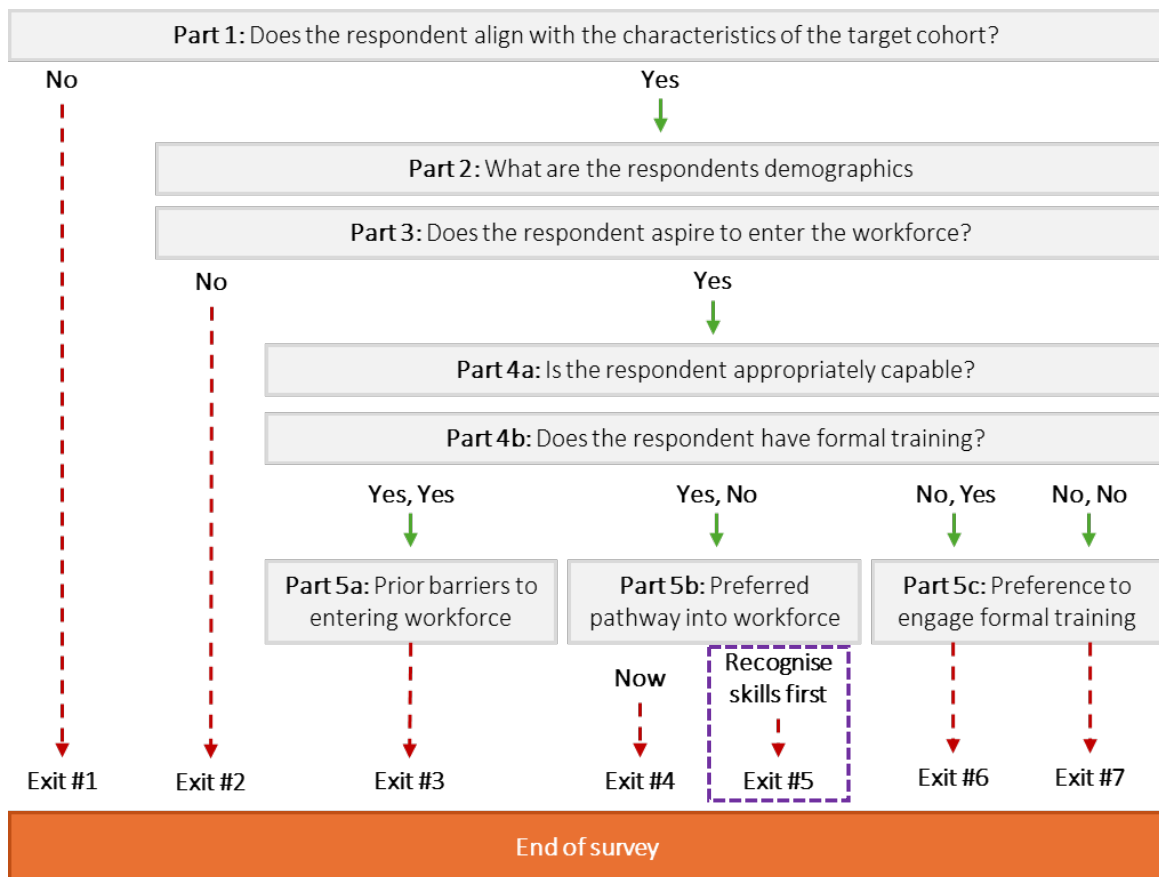
Survey design

We developed a survey using our internal surveying software *Confer* to engage the target cohort. The survey was structured into the following five parts:

1. Confirm alignment with the target cohort attributes
2. Demographic questions
3. Aspiration to enter the workforce
4. Skills and experience
5. Preferred pathway into the workforce

Within each part of the survey, there were several variations of questions presented to respondents depending on how they responded to previous questions. The survey logic (Figure 1) was used to segment the cohort into groups with similar characteristics and preferences to enter the workforce. For example, rural women who are interested in having their existing capability formally recognised before entering the workforce (refer to the research context above) will be segmented along the pathway leading to Exit #5 from the survey. The final survey can be viewed [here](#).

Figure 1: Rural women survey logic



Distribution

We started distributing the survey to engage the target cohort using Meta advertising on Facebook as a high reach, low-cost approach to collecting responses. We followed this up by connecting with the following food and fibre organisations asking them to share the survey on our behalf within their networks:

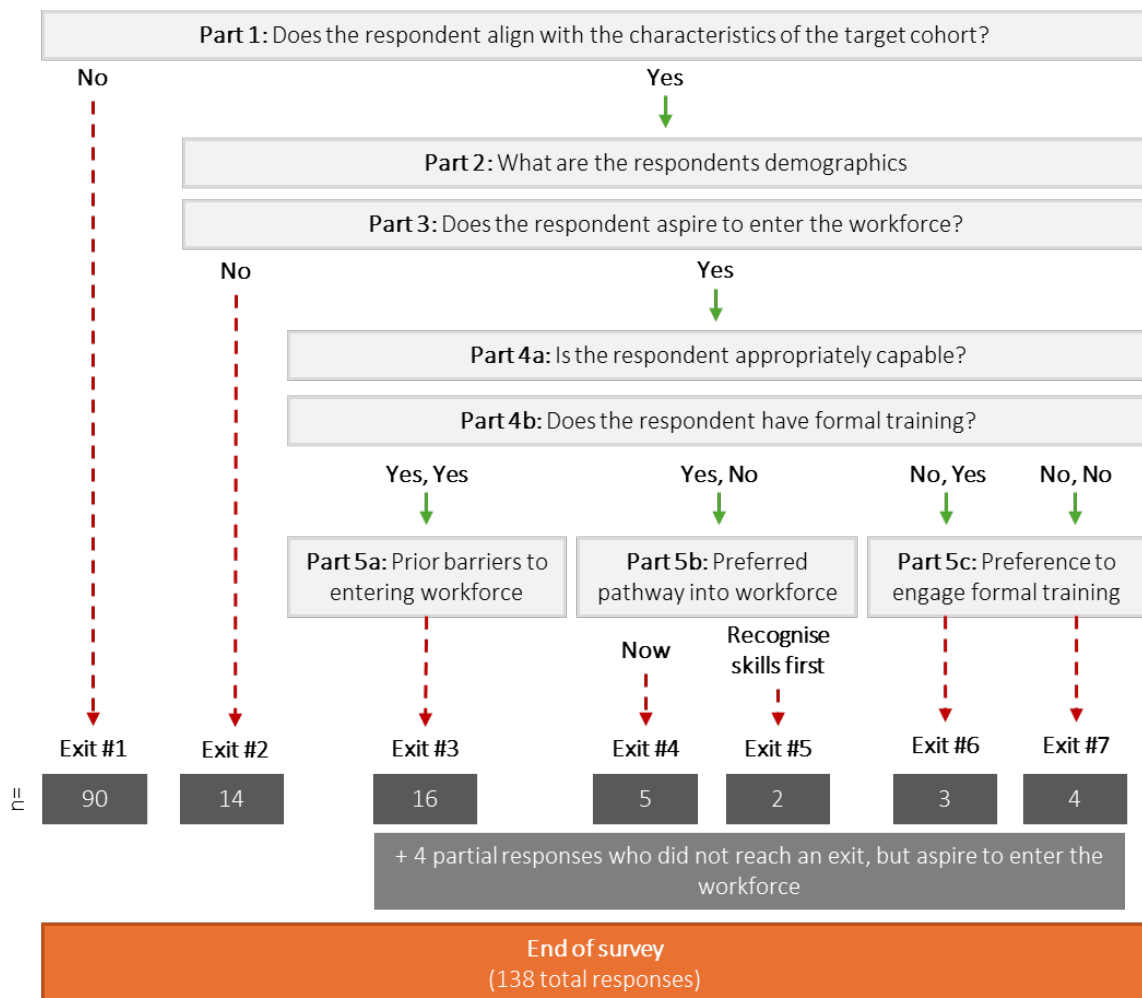
- Rural Women New Zealand
- Ministry for Primary Industries (MPI)
- Food and Fibre Centre of Vocational Excellence
- NZ Institute of Primary Industry Management (NZIPIM)

In most cases, these organisations were still one step removed from the target cohort and they were needing ask people in their networks to share the survey further. Several other organisations were contacted but unable to share the survey for various reasons.

Responses

We received a total of 138 responses to the survey with 48 aligning with target cohort criteria. Of these 48 respondents, 34 aspire to enter the food and fibre workforce soon, while 14 do not (Figure 2).

Figure 2: Number of responses received for each survey exit



Survey findings

Alignment with the target cohort

Of the 138 respondents who were judged to not align with the target cohort, we found that:

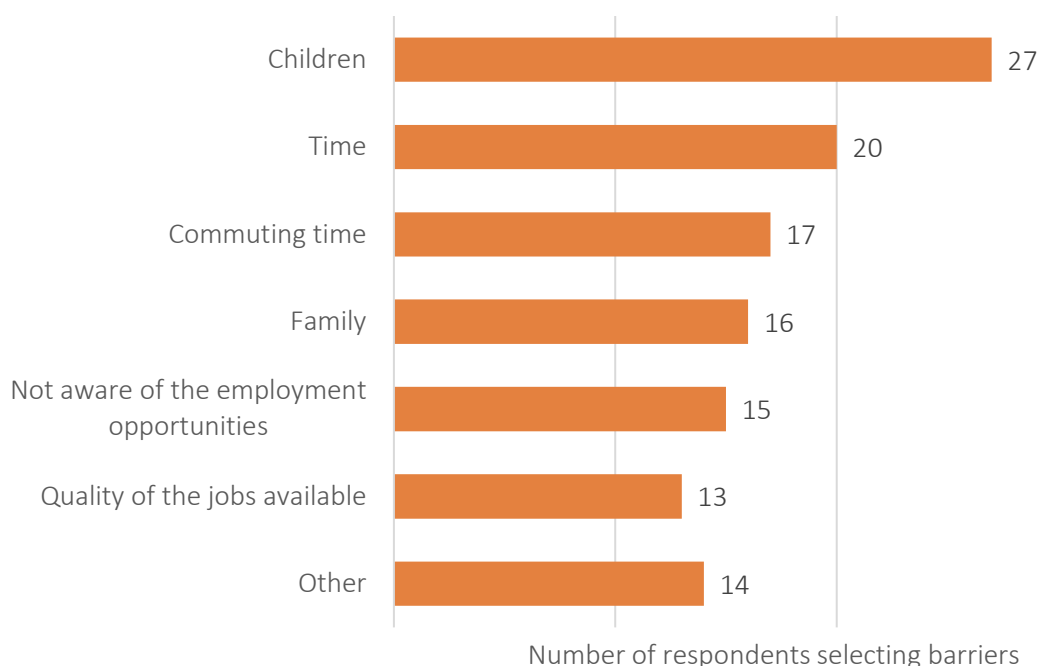
- 38 did not align because they did not identify as being female, were not between 18 and 65 years of age, and/or because they were not married to or in a de facto relationship with someone working in the food and fibre sector,
- 52 did not align because they were already employed full time.

This left 48 responses who aligned with each of the four target cohort criteria for this analysis.

Barriers to entering the workforce

The 48 respondents in the target cohort were then asked to indicate what barriers they face that have prevented them from entering the workforce before. Respondents were able to select as many barriers as they had faced from a list of 10 options. Children was the most selected barrier (58% of respondents), followed by time (48%) and needing to commute (38%) (Figure 3). A third of respondents also indicated they weren't aware of the employment opportunities available to them in the food and fibre sector and a similar number were concerned about the quality of jobs.

Figure 3: Barriers respondents face that prevent them from entering the food and fibre sector workforce



Aspiration to enter the food and fibre workforce

34 of respondents indicated that, in an absence of the barriers they have faced, they would aspire to enter the food and fibre sector workforce soon, while 14 did not. On average, the 34 respondents

indicated they would like to increase their utilisation by around 115%¹ per week as most respondents indicated they would aspire to become employed full time in the sector (Table 1).

Table 1: Respondents' aspirations to increase their utilisation in the food and fibre sector workforce

| Level of employment | Hours per week | | Current distribution | Aspired distribution | Change |
|-----------------------------|----------------|--------------|----------------------|----------------------|---------|
| | Range | Midpoint (a) | (b) | (c) | (c – b) |
| Not employed | 0 | 0 | 11 | 1 | -10 |
| Part-time employment (low) | < 18 | 8 | 5 | 7 | 2 |
| Part-time employment (High) | 18 – 36 | 24 | 18 | 5 | -13 |
| Full time employment | 36+ | 40 | 0 | 21 | +21 |

Of the 34 that aspire to increase their utilisation in the food and fibre workforce, most indicate they have an interest in the sheep and beef industry with dairy and horticulture close behind (Table 2). Eighteen respondents already have some formal experience working in one or more of the food and fibre industries with an average of 5.8 years in accrued experience. Further, their partners (hypothesised to be a source of informal knowledge) have accrued an average of 6.6 years working in the food and fibre industries across a range of roles up to farm owner.

Table 2: Experience accrued working in food and fibre industries by respondents and their partners

| | Respondents' with an interest in... | Respondents' with experience in or exposure to... | Respondents' with a partner working in... |
|------------------------|-------------------------------------|---|---|
| Dairy | 12 | 20 | 11 |
| Sheep and beef | 26 | 29 | 20 |
| Horticulture | 10 | 5 | 3 |
| Forestry | 3 | 1 | - |
| Average tenure accrued | N/A | 6.67 years | 6.56 years |

Respondents could select more than one industry for each of these options if they chose.

Ninety-five percent of respondents aspiring to enter the workforce have also accrued experience volunteering within their local communities (e.g. school PTAs, rural committees, and community groups) fulfilling a range of roles including as secretary and treasurer – both which have skills transferrable to a professional context.

Existing capabilities

Respondents aspiring to enter the workforce were asked to indicate how effectively they perform a series of soft and technical activities involved in or valuable to the administration of an agribusiness.

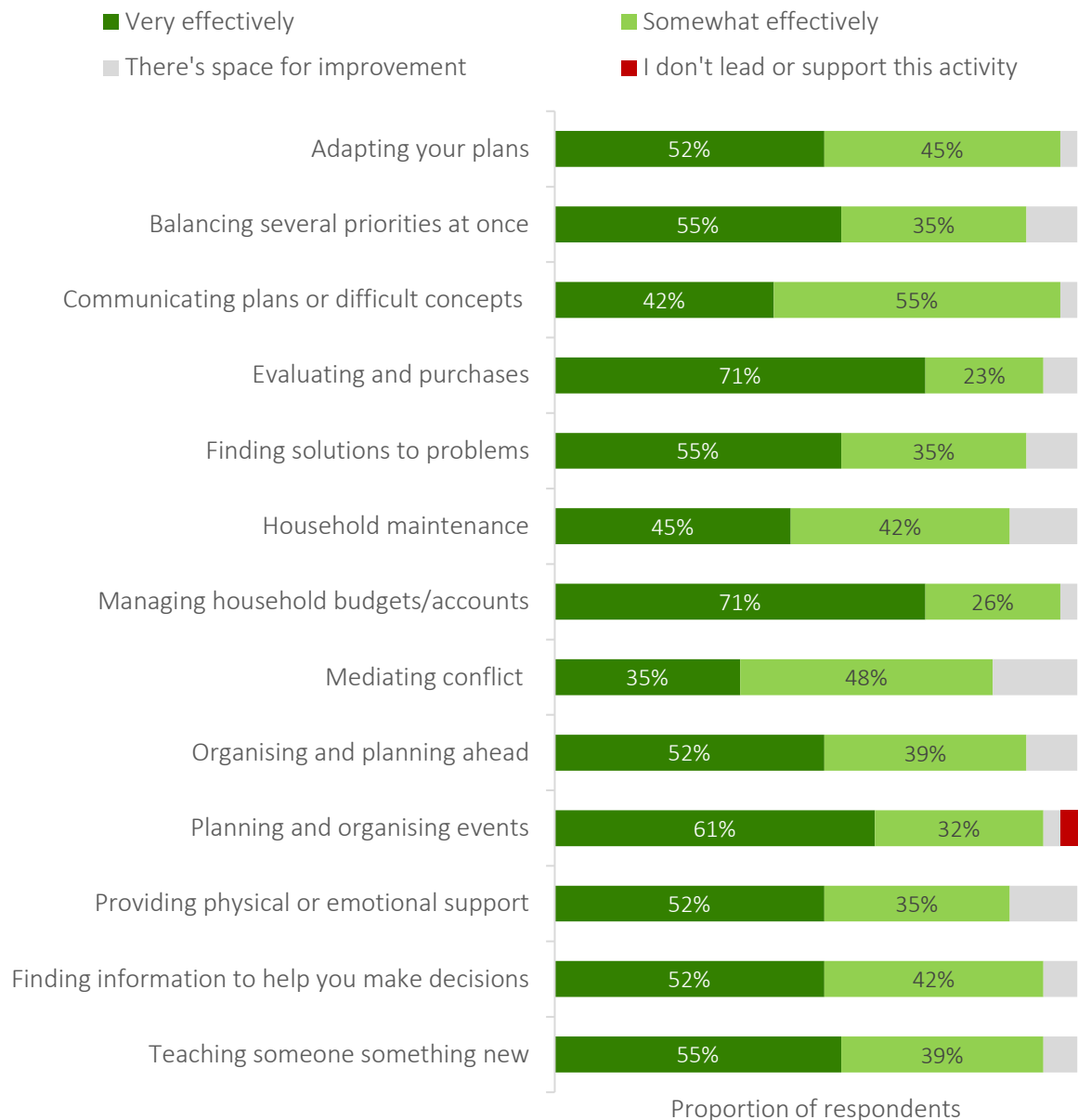
Soft transferrable skills

Respondents were presented with a list of 13 personal and household activities that would require a series of highly transferrable soft skills to complete effectively. For example, effectively 'balancing several activities or priorities at once' would require someone to have excellent multi-tasking and prioritisation skills. Over 90% of respondents indicated they perform at least 50% of the activities

¹ Calculated as the percentage change between the dot product of columns a and b, and columns a and c in Table 1.

somewhat or very effectively – indicating a generally high level of competency among the respondents in the transferrable skills valued by employers (Figure 4). Aside from one instance, all respondents perform these activities to some extent.

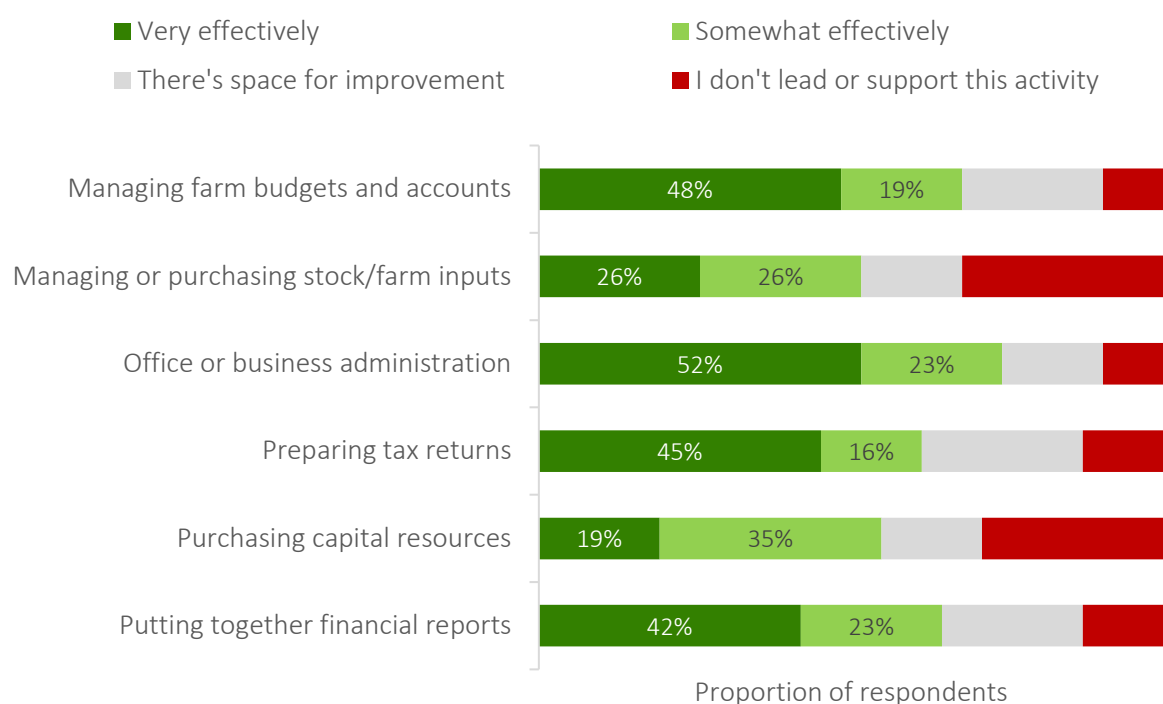
Figure 4: *The effectiveness in which respondents complete personal and household activities*



Technical skills

Respondents were then presented with a list of six activities specific to the administration of an agribusiness requiring several technical skills to complete effectively. Administrating an agribusiness was one of the skillsets rural women were hypothesised to have and one which is regarded to be transferrable between agribusinesses, it was therefore used a starting point for this analysis that could be built on in follow-up interviews. Respondents were considered capable in the context of this survey if they respond somewhat or very effective to at least 50% of these activities. According to this definition, 23 respondents (68%) are considered capable with 11 respondents indicating they complete all six tasks somewhat or very effectively (Figure 5).

Figure 5: The effectiveness with which respondents complete business administration activities



In addition to the business administration skillset, respondents were asked about other skillsets or capabilities they perceived themselves to be capable in. Other areas of high competence include a deep understanding of the sector and context, as well as being able to communicate effectively with stakeholders of the food and fibre sector.

Level of formal training received

Of the 34 respondents aspiring to enter the food and fibre sector, 74% (25) have achieved a formal qualification at some level, while a further 6% (2) had started a formal qualification but not completed it. Eighteen of those with a formal qualification have studied something of direct or indirect (e.g. transferrable skills such as business management) relevance to the food and fibre sector while the remaining have achieved a qualification relevant to another sector. Completed qualifications were of varying levels from micro-credentials and diplomas to degrees - one respondent even had an MBA.

Preferred pathway to enter the food and fibre sector workforce

Based on a combination of their capability at performing the business administration activities above and their level of formal training received, respondents were asked to indicate their preferred pathway into the workforce. The following three pathways were identified for respondents to react to:

1. Leveraging their existing competency (whether developed formally or informally) and engage with employers to respond to job advertisements now,
2. Where competency has been developed informally, having their competency formally recognised against a qualification using an accelerated pathway (e.g. RPL),
3. Where the required level of competency has not quite been achieved, engaging with formal training to develop, and communicate their competency.

Table 3 below shows how respondents with different combinations of capability and training indicated they would prefer/need to enter the food and fibre workforce through one of the above three pathways.

Table 3: Preferred pathways into the food and fibre sector workforce

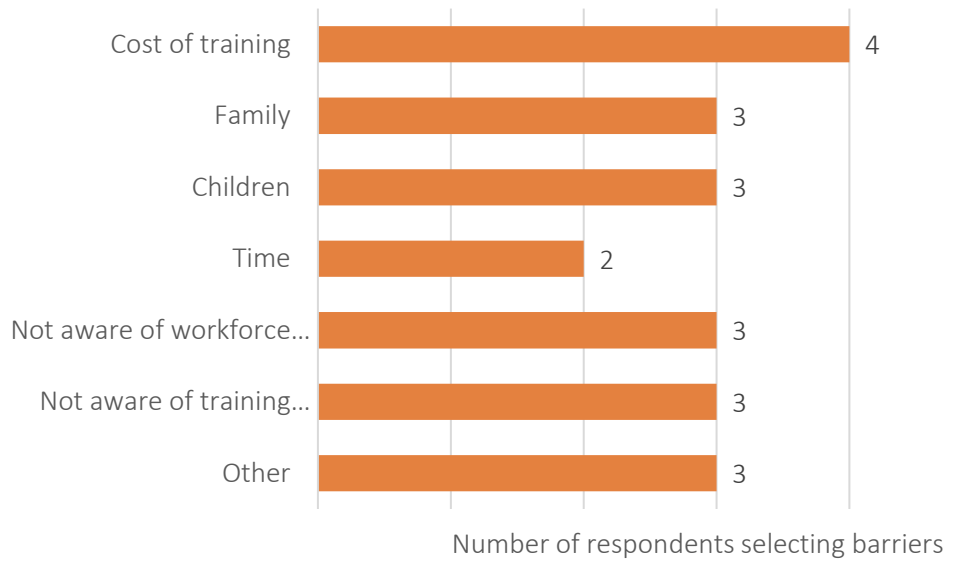
| # | Capability | Training | Preferred pathway | Survey exit (Figure 1) | Size* |
|--|------------|----------|---------------------------------------|------------------------|-----------|
| 1 | Adequate | Formal | Now, leveraging existing skills | 3 | 16 |
| 2 | Adequate | Informal | Now, leveraging existing skills | 4 | 5 |
| 3 | Adequate | Informal | Formal recognition of existing skills | 5 | 2 |
| 4 | Inadequate | Formal | Formal training first | 6 | 3 |
| 5 | Inadequate | Informal | Formal training first | 7 | 4 |
| Dropped out of survey before reaching an exit | | | | | 4 |
| Total number of respondents aspiring to enter the workforce | | | | | 34 |

Sixty two percent of those aspiring to enter the workforce prefer to leverage their existing skills/competency and engage with employers and job advertisements themselves. As most respondents indicated they already had achieved a formal qualification, it is not surprising this was their most preferred pathway into the workforce, using the qualification as proof of their competence. Interestingly, five of the seven respondents who had developed their skills informally also indicated they would prefer to leverage their existing skills without gaining formal recognition first. The remaining two indicated they *would* prefer to have their skills formally recognised first to communicate their potential value with prospective employers.

Barriers to engaging with formal training

The nine respondents who indicated they would prefer to engage with formal training before entering the food and fibre workforce (Table 3) were asked about the barriers they face that have prevented them from engaging with formal training before. Respondents were able to select as many barriers as they had faced from a predetermined list of 12 known barriers to engaging with formal training, many of which are the same as the barriers to entering the workforce mentioned earlier (Figure 6). Respondents selected a greater range of barriers to engaging with training than they did barriers to entering the workforce.

Figure 6: Barriers respondents face that prevent them from engaging with formal training



Cost of training was the most selected barrier to engaging with formal training (44% of respondents), with children and family the next most selected barrier (33% of respondents). A third of all respondents also indicated they were unaware of the training and workforce opportunities available to them. These barriers start to suggest what pathways into the workforce involving formal training will need to address and/or mitigate.

Synthesis of survey findings

Implications for designing workforce pathways for rural women

There are a lot of very talented and experienced rural women underutilised within sector, although effectively engaging with them will be challenging

These women effectively perform a range of soft and technical skills in their day to day lives. Most (according to the responses to this survey) have also achieved formal qualifications at varying levels, although for various reasons do not actively use the skills they have developed.

While engaging this target cohort could help to address workforce challenges the sector is currently facing, they are likely to be very challenging to target and engage with effectively and cost-efficiently. As we found with this survey, the high-reach low-cost channels that are typically used for attraction initiatives (e.g. online promotion, social media, etc.) will likely engage the wrong cohort of rural women such as those who already work full time in the sector. The target cohort of rural women will be managing several personal, family, and professional commitments at once and will likely be more effectively engaged via low-reach high-cost channels such as via the community groups they engage with. Effective targeting of attraction initiatives was identified as one of the key design principles for good attraction as part of FFCoVE's [attraction and retention research programme](#).

Rural women lack a general awareness of the opportunities available to them in the workforce and to engage with formal training

We heard from a third of respondents that they were generally unaware of the opportunities available to them in the workforce and in training. Before designing either of the three pathways identified for underutilised rural women to enter the workforce (Page 10), it may be necessary to develop material that builds awareness of the opportunities available to rural women and communicates the value proposition to them of the three pathways.

When it comes to entering the workforce, respondents identified several barriers they face that prevent them from entering the workforce (Page 7). For the most part, these were their children and lack of time. Both would be challenging to mitigate with the design of a workforce pathway, whereas respondents' lack of awareness to the opportunities available to them in the workforce could be addressed. To build the value proposition for entering the workforce, material could aim to communicate the soft and technical skills employers in the industry are seeking (i.e. the skills gaps) with links back to how the soft and technical skills and experiences rural women have could help. As respondents who selected a lack of awareness as a barrier also selected children and lack of time, pathways would need to mitigate these as well to support their engagement.

When it comes to engaging with formal training, rural women cited access related barriers (e.g. children, family, time, and cost) and a lack of awareness of the training opportunities available to them as the barriers they face. Off the back of the Covid-19 lockdowns, training provision has evolved to address access related barriers to engaging in training by making distance and asynchronous approaches mainstream learning options so the learning can fit around the learner's schedule. To build the value proposition for entering the workforce, material could aim to build awareness of the flexible learning modes available as mitigations to some of the key barriers they face.

Rural women prefer to enter the workforce directly leveraging the skills they have already without formal recognition, and could benefit from support with the hiring process

When rural women are effectively competent (regardless of their formal training experience), we heard they would prefer to enter the workforce by leveraging the skills they already have. This highlights a potential opportunity to support rural women into the workforce by providing clarity on the recruitment process, instilling self-confidence to approach employers, and working through some tips and tricks to effectively communicate the value of their skills and experience. This pathway may be more effective than designing a pathway that recognises informally developed skills to engage this cohort in the workforce.

Recommendations for next steps

With regards to the implications identified above, we recommend a series of online interviews as the next steps that would help:

1. Validate the survey responses we received,
2. Understand how the target cohort of rural women can be most effectively engaged with,
3. Assess the extent to which the target cohort of rural women appreciate that the soft and technical skills they possess (whether developed formally or informally) are valued by employers and an enabler for them to enter the workforce,
4. Evaluate how each the three pathways into the food and fibre workforce would need to be designed to effectively support rural women and mitigate the prevailing barriers to engagement.

Collectively, this work will validate and/or characterise the implications for designing pathways that support underutilised women in the food and fibre sector workforce.