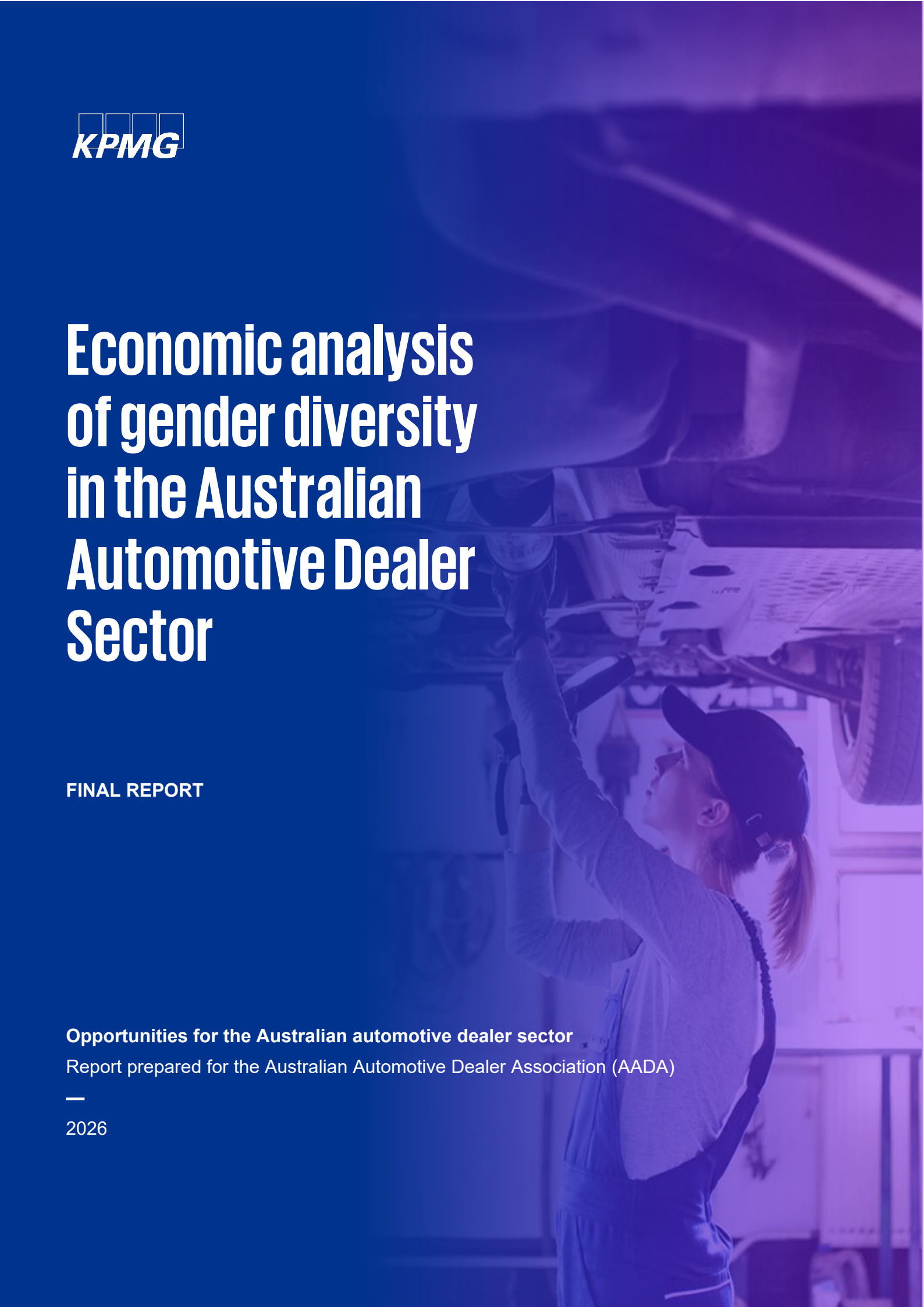
KPMG

Economic analysis of gender diversity in the Australian Automotive Dealer Sector

FINAL REPORT



Opportunities for the Australian automotive dealer sector

Report prepared for the Australian Automotive Dealer Association (AADA)

—

2026

Acknowledgement of Country

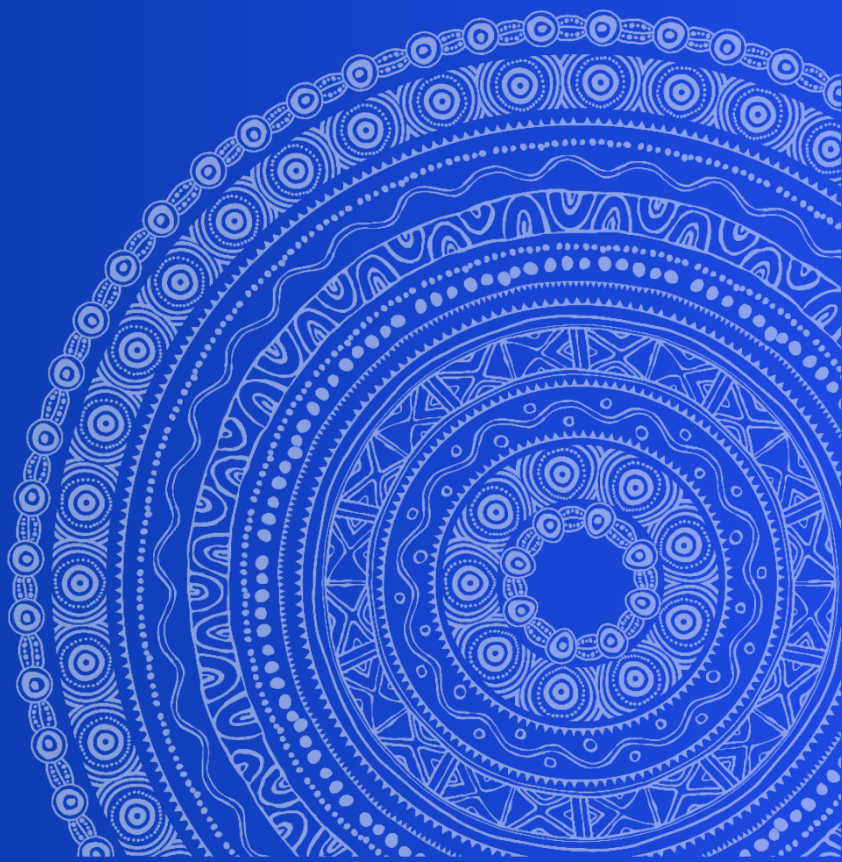
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At KPMG, our future is one where all Australians are united by a shared, honest, and complete understanding of our past, present, and future. We are committed to making this future a reality. Our story celebrates and acknowledges that the cultures, histories, rights, and voices of Aboriginal and Torres Strait Islander People are heard, understood, respected, and celebrated.

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Executive summary

A significant sector with an underused source of talent

Australia's automotive dealer sector generates **$21.5 billion in annual GVA**, **$91.3 billion in sales** and employs more than **64,000 people across 3,910 dealerships**. Yet, despite the size and contribution of the sector to the Australian economy, women are significantly underrepresented in the workforce. At a time when the sector faces major challenges – pressure on margins, persistent skills shortages, rapid technology and product change, evolving buyer behaviour and shifting customer expectations – improving attraction, retention and progression of women is a strategic workforce opportunity, and estimates indicate a potential sector-wide revenue benefit of over $400 million.

Current sector performance

23%
of employees are women

14%
of managers are women
vs 43% nationally

8%
of CEOs are women -
pipeline narrows with seniority

5%
of technical trade roles
held by women

31%
female attrition
vs 23% for men

15%
midpoint pay gap
vs 11% nationally

What the performance data shows

Dimension	Performance and implication
Participation	Female representation has remained broadly unchanged at around 1 in 4 over the past decade indicating that the sector is not fully accessing the available talent pool while competing for scarce technical and customer-facing skills.
Retention and progression	Women leave the sector at materially higher rates, including around parental leave and return-to-work. Promotion rates are similar (3.7% for women and 3.6% for men) so retention, not promotion, is the primary constraint on there being more women in senior roles.

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Role mix	Women occupy 74% of clerical and administrative roles but only 5% of workshop trades. Because trades are the largest occupational group and a feeder into service and operational leadership, there are flow-on implications for progression to more senior roles.
Pay gap	The pay gap largely reflects where women work. Women comprise only 16% of the highest-paid quartile and are underrepresented in trades, sales and senior leadership.
Training pipeline	Women account for only 14% of car-retailing apprenticeship commencements and were 11% more likely than men to exit before completion between 2012 and 2024, weakening the pipeline into technical and operational careers.

$67–$100M
Estimated annual avoided replacement cost

$228-457M
Indicative annual revenue uplift

Retention is the most immediate value opportunity

Closing the female attrition gap could retain approximately **1,250 additional women each year**. The report also estimates that a 0.25%–0.50% performance uplift across $91.3 billion of sector sales would equate to approximately **$228–$457 million in annual revenue**.

Significant revenue uplift opportunity

The report estimates that a modest 0.25%–0.50% performance uplift across $91.3 billion of sector sales, due to addressing the attrition gap could equate to approximately **$228–$457 million in annual revenue**.

What is driving current performance?

1. Weak sector proposition

Many women see only mechanics and vehicle sales, not careers across finance, operations, technology, HR and leadership. New car dealerships recorded the lowest reputation rating assessed — **5.5 out of 10**. Among women not considering the sector, **45%** said it felt irrelevant and **24%** cited poor reputation.

2. Narrow entry pathways

Traditional sourcing, sector-experience requirements and male-dominated networks reproduce the existing workforce profile. Yet demand exists: **77%** of women open to working in the automotive sector would consider an apprenticeship or traineeship; consideration is strongest for operational and supply-chain workers (**41%**) and mid-career women (**39%**).

3. Workplace culture barriers

Consultations identified enduring “boys’ club” perceptions, bullying, harassment and pressure on women to prove credibility. Only **43%** of AADA members reporting to WGEA have a diversity and inclusion policy. Respect and trustworthiness were each selected by **55%** of potential entrants as important workplace values.

4. Inflexible operating practices

Long hours, weekend rosters and rigid return-to-work arrangements are poorly aligned with caring responsibilities. Only **47%** of AADA members have a flexible work policy, compared to more than **85%** across comparator sectors of construction, mining and energy. Work-life balance is essential to **76%** of women considering the sector.

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5. Invisible pathways to leadership

Women report needing to work harder to establish competence but see few role models in their dealership or the broader sector. Only **35%** of surveyed women agreed that dealerships offer great career pathways for women. Mentoring, sponsorship and visible leaders are not yet consistently embedded.

6. Limited accountability

Only **43%** of AADA members have an equal remuneration policy and **45%** conduct gender pay gap analysis. Reporting at group or entity level can mask dealership-level issues, while many smaller dealerships capture little consistent workforce data.

Opportunities to improve

Priority	Practical focus for members	Value created
Attract	Promote the full range of dealership careers; partner with schools, TAFEs and communities; use visible female role models; broaden sourcing and remove unnecessarily narrow experience requirements.	Larger recruitment pools, improved reputation and better access to transferable skills.
Retain	Set clear behavioural expectations, provide trusted reporting channels, act promptly on misconduct, and hold leaders accountable for respectful and inclusive workplaces.	Lower turnover, stronger engagement, safer workplaces and reduced replacement cost.
Flex	Pilot flexible working schedules, rostered days off including weekends, part-time and job-share models, hybrid work where suitable, and tailored return-from-parental-leave transitions.	Better retention at key life stages, broader candidate pools and improved workforce sustainability.
Build	Expand targeted apprenticeships and traineeships; identify high-potential women; embed mentoring, sponsorship, leadership development and diverse succession planning.	Stronger technical and leadership pipelines, more role models and improved succession.
Measure	Capture gender data by dealership, role, seniority, pay, promotion and exit; conduct pay gap analysis; review progress at executive level; and support confidential AADA sector benchmarking.	Clear baselines, targeted investment, accountability and earlier identification of retention risk.

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Purpose and method

The AADA commissioned KPMG to undertake an economic analysis of gender equity within the Australian automotive dealer sector. The purpose of the study is to assess current workforce outcomes, understand the drivers of gender representation and remuneration patterns, and identify opportunities to improve participation, retention and progression of women across the industry.

This study provides **the first detailed gender workforce and economic analysis focused on AADA members and the broader new car dealership workforce**.

A mixed-methods research approach was adopted to provide robust, quantitative evidence of workforce outcomes and qualitative insights into the factors influencing those outcomes. The methodology combined:

- Analysis of workforce composition, remuneration and vocational education datasets
- Literature review and comparison with other industries
- Stakeholder consultations across the automotive dealer sector
- A survey of potential female workforce entrants to the sector
- Economic analysis of workforce trends and opportunities.

Findings were triangulated across sources. WGEA results primarily reflect the 49 AADA member organisations with 100 or more employees which have submitted reports included in the WGEA Employer Census 2024-25 and should be read as indicative of larger members rather than representing the full membership.

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01

1 Introduction

This section outlines the context, purpose and rationale for examining gender equity within the Australian automotive dealer sector. It highlights the sector's economic significance, the workforce challenges facing dealerships, and the opportunity to strengthen access to talent through improved female participation and progression. The section also presents the business case for gender equity, drawing on evidence linking more diverse workforces to stronger customer alignment, improved talent attraction and retention, enhanced productivity and innovation, and better financial performance.

Context

The Australian automotive dealer sector[1] is a significant contributor to the national economy, generating approximately $21.5 billion in annual gross value added (GVA) and supporting employment, investment and economic activity across metropolitan, regional and rural Australia.[2] Key indicators of sector performance are summarised in Figure 1.

Figure 1: Australian automotive dealer sector performance, 2026

GVA	Sales	Dealerships	Employees
$21.5B	$91.3B	3,910	64,045

Source: Australian Automotive Dealer Association (2026). Dealernomics 2026 – Automotive Statistics [accessed: https://www.aada.asn.au/dealernomics-2026/]

While the economic performance of the sector is strong, automotive dealerships are operating in an increasingly challenging workforce environment.[3] Pressure on dealerships is being driven by a combination of factors as illustrated in Figure 2 and detailed further below.

Figure 2: Australian automotive dealer sector challenges



[1] For the purposes of this report, the Australian Automotive Dealer Sector captures franchised new vehicle dealerships, including sales, service, parts and dealership administration.
[2] Australian Automotive Dealer Association (2026). Dealernomics 2026 – Automotive Statistics [accessed: https://www.aada.asn.au/dealernomics-2026/]
[3] McKinsey (2019). As dramatic disruption comes to automotive showrooms, proactive dealers can benefit greatly. [accessed: https://www.mckinsey.com/~/media/McKinsey/Industries/Automotive%20and%20Assembly/Our%20Insights/As%20dramatic%20disruption%20comes%20to%20automotive%20showrooms%20proactive%20dealers%20can%20benefit%20greatly/As-dramatic-disruption-comes-to-automotive-showrooms.pdf]

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Key challenges facing the sector, include:

- **Persistent skills shortages and increasing competition for labour** are making it more difficult for dealerships to recruit and retain qualified employees across both technical and customer-facing roles.
- **Supply chain disruptions** and fluctuations in vehicle availability continue to create operational challenges and can affect dealership sales performance and customer satisfaction.
- **Emerging vehicle technologies**, including increasing vehicle electrification and digitalisation, are changing the skills and capabilities required across the workforce and increasing demand for specialist expertise.
- **Changing customer expectations** are placing greater emphasis on trust, transparency, convenience and customer experience, requiring dealerships to continually adapt how they engage and support customers.[4]
- **Ongoing profitability pressures**, driven by intensifying competition, tightening new vehicle margins and rising operating costs, are increasing the need for dealerships to improve productivity and maintain a sustainable competitive advantage.[5]

Together, these factors increase the importance of workforce capability and resilience. As businesses in the automotive dealer sector adapt to changing technologies, evolving customer expectations and ongoing commercial pressures, their ability to attract, retain and develop skilled talent will become increasingly critical to supporting future growth and competitiveness.[6]

For many organisations in the sector, workforce capability has become a key strategic business issue. Access to skilled employees directly influences customer experience, operational performance, succession planning and long-term profitability. As competition for talent intensifies, dealerships that can effectively attract and retain employees will be better positioned to sustain growth and remain competitive.

Within this context, gender equity should be viewed as a workforce and business performance issue rather than solely a diversity initiative. Women currently represent approximately one-fifth of the Australian automotive dealer workforce, making the sector one of Australia's most male-dominated industries.[7] This means the sector is not fully accessing the available talent pool at a time when workforce constraints are becoming increasingly acute.

Low female participation has implications beyond workforce diversity. It can limit recruitment outcomes, constrain leadership pipelines and reduce workforce resilience. Increasing the participation and progression of women in the industry presents an opportunity to expand access to talent, strengthen retention, build future leadership capability and better align workforce composition to customer expectations. For dealerships facing ongoing workforce shortages, improving gender representation is therefore not simply a social objective. By helping businesses access a broader talent pool, improve workforce capability and better reflect their customer base, it can support productivity, strengthen organisational performance and contribute to long-term profitability and business value.

1.1 The importance of gender equity in the workforce

Improving gender equity is often considered a diversity objective, however, it can also deliver tangible business benefits. For businesses in the Australian automotive dealer sector, increasing the participation and progression of women can help address several of the workforce and commercial challenges facing the sector outlined above. A growing body of evidence suggests that organisations with more gender-diverse workforces are better positioned to attract talent, improve organisational performance and drive long-term business success.

Organisations with more gender-diverse workforces have been shown to benefit across multiple dimensions of business performance. These include improving access to talent in constrained labour markets, strengthening workforce productivity and collaboration through a broader range of perspectives and experiences, better reflecting and responding to customer preferences, and supporting stronger financial performance over the long term.[8] Collectively, these outcomes can enhance organisational resilience and strengthen a business's ability to adapt and compete in a changing operating environment.

[4] Automotive Mastermind (2021). 4 ways for dealerships to create a transparent customer experience. [accessed: https://www.automotivemastermind.com/blog/dealerships/4-ways-to-create-a-transparent-customer-experience/]
[5] Pitcher Partners (2026). The top 10 challenges defining the Australian automotive industry in 2026. [accessed: https://www.pitcher.com.au/insights/the-top-10-challenges-defining-the-australian-automotive-industry-in-2026/]
[6] Mining and Automotive Skills Alliance (2026). Transitions in focus – the automotive industry [accessed: https://ausmasa.org.au/news-and-events/automotive-research-bulletin-may-2026/]
[7] Australian Bureau of Statistics, Employed Persons by Industry Group of Main Job (ANZSIC 3911)
[8] WGEA (2018). Workplace gender equality: the business case. [accessed: https://www.wgea.gov.au/publications/gender-equality-business-case]

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For automotive dealerships, these benefits are particularly relevant given the workforce and commercial challenges facing the sector. Improving gender equity provides an opportunity to strengthen workforce capability, enhance customer engagement, build future leadership pipelines and support sustainable business growth. The following sections examine four key business benefits associated with improving gender equity in the automotive dealer workforce, namely:

Figure 3: Benefits of gender equity in the workforce



Alignment with consumer preferences

Women represent a significant proportion of automotive consumers and are estimated to influence approximately 85 per cent of vehicle purchasing decisions. [9] As a result, understanding and responding to the preferences and expectations of female customers is important for dealerships seeking to remain competitive. Consultation with AADA members highlighted that some customers, especially female customers, prefer interacting with, and purchasing from, female car salespeople on the dealership floor.

> ***"Nine times out of ten, the female is the one influencing that [purchase] decision… our workforce should reflect that."*** *– Dealer Principal, Large Corporate Dealership (QLD)*
>
> ***"When a woman walks into the dealership and she will automatically, 99.9% gravitate towards a woman sales consultant. I just think it's the emotional aspect of it, you know, from a woman to a woman. She's going to give me the truth and not be the used car salesman, which I feel in the world, in automotive, it has such a bad rap."*** *– Sales Consultant, Large Corporate Dealership (NSW)*
>
> ***"People will naturally gravitate to a female because, in my experience, they know that they're going to get honesty, they're going to get transparency, they know they're going to get an element of empathy."*** *– Sales Consultant, Large Corporate Dealership (NSW)*

While customer preferences vary, these insights suggest that increasing the representation of women in customer-facing roles may help dealerships better engage a customer base in which women play a significant role in vehicle purchasing decisions. A more gender-diverse workforce can bring a broader range of perspectives to customer interactions, supporting stronger communication, greater empathy and a more tailored customer experience. In a market where purchasing decisions are influenced not only by product features and price, but also by trust, relationships and service quality, these capabilities can provide an important source of competitive differentiation.

For business leaders in the automotive dealer sector, improving gender representation is a commercial opportunity. Better aligning the composition of the workforce more closely with the preferences of female customers to engage with female salespeople can strengthen customer engagement, enhance the dealership experience and support stronger sales performance. As customer experience becomes an increasingly important driver of purchasing behaviour and brand loyalty, dealerships that can effectively connect with a broader range of customers may be better positioned to grow market share and build long-term customer relationships.

[9] Forbes (2022). 7 Reasons there are few women in automotive leadership new research. [accessed: https://www.forbes.com/sites/joanmichelson2/2022/01/28/7-reasons-there-are-few-women-in-automotive-leadership--new-research/]

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Improved access to talent

Access to skilled labour is a persistent challenge for the automotive dealer sector.[10] Demographic change, on-going skills shortages and increasing competition for technical talent are making it harder to recruit and retain the workforce needed to meet customer demand, expand operations and adapt to industry change. Jobs and Skills Australia (JSA) list automotive electricians and motor mechanics as occupations with skills shortages in every state and territory across Australia.[11] JSA estimates that there are currently 39,800 job vacancies across automotive and engineering trades positions nationally.[12] These challenges are expected to intensify over coming decades as Australia's population ages, with the total working age population projected to decline by around eight percentage points by 2047.[13] This could equate to 2.7 million fewer people of working age than would otherwise be the case.[14,15]

Figure 4: Workforce statistics

39,800 job vacancies

across Automotive and Engineering Trades Workers

8%↓

Projected drop in the **working age population** over the next 20 years

Competition for skilled workers is becoming increasingly intense. The rise of electric vehicles, self-driving cars and alternative fuel technologies are all changing the capabilities that dealerships require across both technical and customer-facing roles.[16] During consultations, stakeholders raised that dealerships are no longer competing only with each other for talent, but with industries such as mining, construction and energy that require many of the same technical capabilities and are often able to offer higher remuneration. As a result, attracting and retaining skilled employees is becoming a strategic differentiator rather than simply an operational challenge.

> ***"I lost two salespeople in one week, both to the mines just last month"*** *– Dealer Principal, Large Corporate Dealership (QLD)*
>
> ***"They're on cracking money, like entry-level to drive a big truck is $140,000. I lost the first year ... young fellow that we'd employed, and we were putting him through a programme to become a technician ... He lasted 3 months and he came and said to me, 'I'm going to the mines'."*** *– Dealer Principal, Large Corporate Dealership (QLD)*

For business leaders in the automotive dealer sector, this means future workforce success will depend not only on competing more effectively for existing talent, but also on reaching new sources of talent. Women remain significantly underrepresented across the automotive dealer sector workforce, representing one of the industry's largest untapped labour pools. Improving the attraction, retention and progression of women provides businesses in the sector with an opportunity to expand the available talent pipeline, reduce recruitment constraints and strengthen workforce capability at a time when skilled labour is increasingly scarce.

Enhanced productivity and workforce dynamics

Beyond expanding the available talent pool, greater gender diversity can benefit automotive dealerships by strengthening decision-making, problem-solving and innovation. A substantial body of research shows that diverse teams are associated with stronger problem-solving, better decision-making and greater innovation because they draw on a broader range of perspectives, experiences and approaches.[17] For example, a study by Havard Business Review found that more diverse teams perform better when responding to new, uncertain and complex challenges because the bring different ways of thinking, processing information and approach decision. In contrast,

[10] Motor Traders' Association of NSW (2025). MTA NSW Warns that Australia's Automotive Skills Shortage is Now a National Productivity Crisis. [accessed: https://www.mtansw.com.au/news-media/news-articles/mta-nsw-warns-that-australia-s-automotive-skills-shortage-i.aspx?srsltid=AfmBOopD1nMC9TUF-5ZLqWvXxFZ5DgK2JYDWHMDCyQb2SF8a1Hubnvuj]
[11] Jobs and Skills Australia (2025). Occupation Shortage List by ANZSCO. ANZSCO's 321111 and 321211.
[12] Jobs and Skills Australia (2026). Total New Vacancies – Occupations. Occupation code 32
[13] CEDA (n.d). The economic impact of Australia's ageing population. [accessed: https://www.ceda.com.au/research-and-policy/research/health-ageing/the-economic-impact-of-australia%E2%80%99s-ageing-populati]
[14] Indicative estimate only. CEDA projects that the proportion of Australians of traditional working age (15-64 years) will decline by approximately eight percentage points by 2047. Applying this eight-percentage point change to the ABS projected Australian population of 34 million in 2047 yields an indicative reduction of approximately 2.7 million people of working age (34 million × 8%).
[15] ABS (2022). Population projections Australia. 2047 medium series. [accessed: https://www.abs.gov.au/statistics/people/population/population-projections-australia/latest-release]
[16] EpicFlow. Key technology trends in the automotive industry in 2026. [accessed: https://www.epicflow.com/blog/5-latest-trends-in-the-automotive-industry/]
[17] Fuentes-Fuentes Et. Al. (2023). Gender diversity, inclusive innovation and firm performance. [accessed: https://onlinelibrary.wiley.com/doi/full/10.1002/sd.2615]

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more homogenous teams can be constrained by shared assumptions and narrower approaches to problem-solving.[18] Another study found that inclusive organisations are six times more likely to be innovative and agile, and eight times more likely to achieve better business outcomes.[19]

Research has also shown that gender diversity contributes to healthier workplace dynamics, with inclusive workplaces associated with higher employee engagement, stronger collaboration, and lower turnover, all of which support productivity and reduce the costs associated with recruitment and workforce disruption.[20,21] For automotive dealerships, more gender diverse teams can support more effective decision-making and encourage innovation. This is particularly important as the sector navigates significant technological change, including the growing adoption of electric vehicles, advances in vehicle software and connectivity, and increasing demand for digital and customer-centric sales and service experiences.

> ***"I think that having diversity in any area is important, [for example] the conversations that we have around strategy or innovation"*** *– Human Resources, Large Corporate Dealership (QLD)*
>
> ***"We have showed some statistics that if you have a better gender balance customers trust them and companies actually make more money."*** *– Human Resources, Large Corporate Dealership (SA)*

Stronger financial performance

A substantial body of research links gender diversity in leadership to improved financial performance. Organisations with more gender-balanced executive teams and boards are more likely to outperform their peers on measures such as profitability and value creation. For example, a study by McKinsey found that companies in the top quartile for gender diversity in their executive teams were 25 per cent more likely to experience above average profitability.[22] The study also found that companies with executive teams made up of more than 30 per cent women were significantly more likely to outperform those with lower representation. Similarly, a study by BCG similarly found that companies with above average gender diversity on their management teams reported innovation revenue that was 19 percentage points higher than that of companies with below-average leadership diversity.[23]

Figure 5: Gender equity and financial performance

Companies in the top quartile for gender diversity on their executive **are 25% more likely to outperform their peers on profitability**

Companies with above-average gender diversity **report innovation revenue 19% higher** than that of companies with below average diversity

Research also indicates that gender equity can strengthen workplace culture and improve retention, delivering significant operational and financial benefits. High workforce turnover creates costs associated with recruitment, onboarding, training, lost productivity and vacant positions. Organisations undertaking actions such as gender pay gap analysis, flexible work strategies and gender equity targets have been found to have substantially lower resignation rates among women, whereas organisations that failed to implement these measures recorded persistently higher female resignation rates, suggesting a clear retention cost to inaction.[24] It has also been found that undertaking a gender pay gap analysis is associated with reductions in women's relative resignation rates of up to 18 percentage points for managers and 16 percentage points for non-managers.[25]

[18] Havard Business Review (2017). Teams Solve Problems Faster When They're More Cognitively Diverse. [accessed:
[19] Deloitte (2018). The diversity and inclusion revolution: Eight powerful truths. [accessed: DI_Diversity-and-inclusion-revolution.pdf (SECURED)]
[20] Nawal & Alfawaz. (2025). Enhancing organizational performance: how gender diversity enhances employee engagement and commitment. [accessed: https://www.nature.com/articles/s41599-025-04441-7]
[21] WGEA (2025). Gender Equity Insights. [accessed: https://www.wgea.gov.au/sites/default/files/documents/BCEC-WGEA-2025-Gender-Equity-Insights-Report.pdf]
[22] McKinsey & Company (2020). Diversity wins: How inclusion matters. [accessed: https://www.mckinsey.com/featured-insights/diversity-and-inclusion/diversity-wins-how-inclusion-matters]
[23] BCG (2018). How Diverse Leadership Teams Boost Innovation. [accessed: https://www.bcg.com/publications/2018/how-diverse-leadership-teams-boost-innovation]
[24] WGEA (2025). Gender Equity Insights. [accessed: https://www.wgea.gov.au/sites/default/files/documents/BCEC-WGEA-2025-Gender-Equity-Insights-Report.pdf]
[25] *Ibid.*

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While gender diversity alone does not guarantee improved financial performance, the weight of evidence suggests that it is a meaningful contributing factor. For industries such as automotive retail where margins can be tight and competition is strong, leveraging the performance benefits associated with a more diverse and inclusive workforce represents a tangible opportunity to enhance long-term business success.

> ***"I can confidently say if there are more women sales consultants we would do more sales. From a performance point of view… there is a clear benefit"*** *– Sales Consultant, Large Corporate Dealership (NSW)*

1.2 Purpose of the study

The purpose of this study is to provide, for the first time, a detailed gender workforce and economic analysis of the Australian automotive dealer sector, with a particular focus on AADA members and the broader new car dealership workforce. It set out to identify the barriers and opportunities influencing women's participation in the industry and build a practical evidence base to help dealerships attract, retain and advance more women across all areas of their business.

The aim of this study was to:

- **Provide dealership leaders with a clear picture of the current workforce landscape**, including where women are represented, underrepresented and exiting the industry across dealership functions and career stages.
- **Identify the workforce, cultural and operational barriers limiting the attraction, retention and advancement of women**, and highlight the factors that enable dealerships to build and retain diverse talent.
- **Assess the business implications of current workforce trends**, including the impact on talent attraction, retention, succession planning, productivity and long-term workforce sustainability.
- **Benchmark the automotive retail sector against leading industries and international automotive markets** to identify practical opportunities for improvement and lessons that can be applied within Australian dealerships.
- **Highlight the actions, policies and practices most likely to improve workforce participation and retention**, drawing on evidence from within and beyond the automotive sector.
- **Provide dealership executives with evidence-based recommendations** to support workforce planning, strengthen talent pipelines and improve the industry's ability to attract and retain the skills needed for future growth.

By combining quantitative analysis with insights from stakeholder consultations and an industry survey, the study seeks to build a robust evidence base to inform decision-making and policy development within the sector. The scope of this work included:

- Conduct quantitative analysis using industry employment data, surveys, and workforce statistics.
- Undertake qualitative research through interviews and case studies with women currently, formerly employed or currently not employed in the sector but would consider working for a new car dealership.
- Review education and training pathways, including apprenticeships and vocational programs.
- Assess workplace culture, recruitment practices, and career progression opportunities in other male-dominated industries.
- Compare findings with international best practices and industries with higher female participation.

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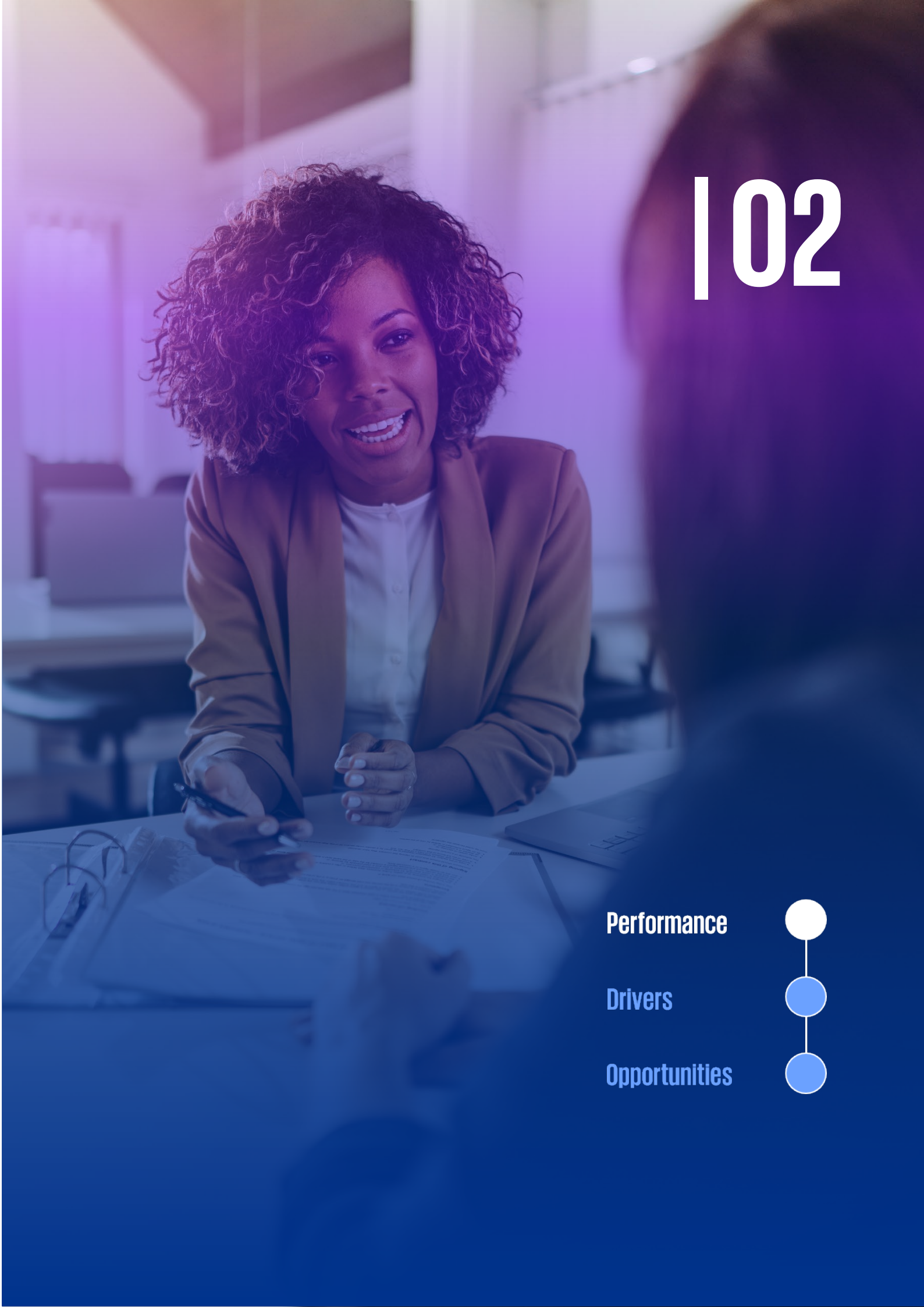
1.3 Approach

A mixed-methods research approach was adopted to provide both quantitative evidence of workforce outcomes and qualitative insights into the factors influencing those outcomes. The methodology combined:

- Analysis of workforce, remuneration and vocational education datasets
- Stakeholder consultations with business leaders and employees across the automotive dealer sector
- A survey of potential female entrants to the Australian automotive dealer sector
- Literature review and comparison with selected comparator industries
- Economic analysis of workforce trends and opportunities.

The combination of these methods enabled triangulation of findings and supported the development of evidence-based conclusions regarding gender equity within the sector. Detailed descriptions of the approaches that underpin the study are contained in the Appendices.

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02

Performance

Drivers

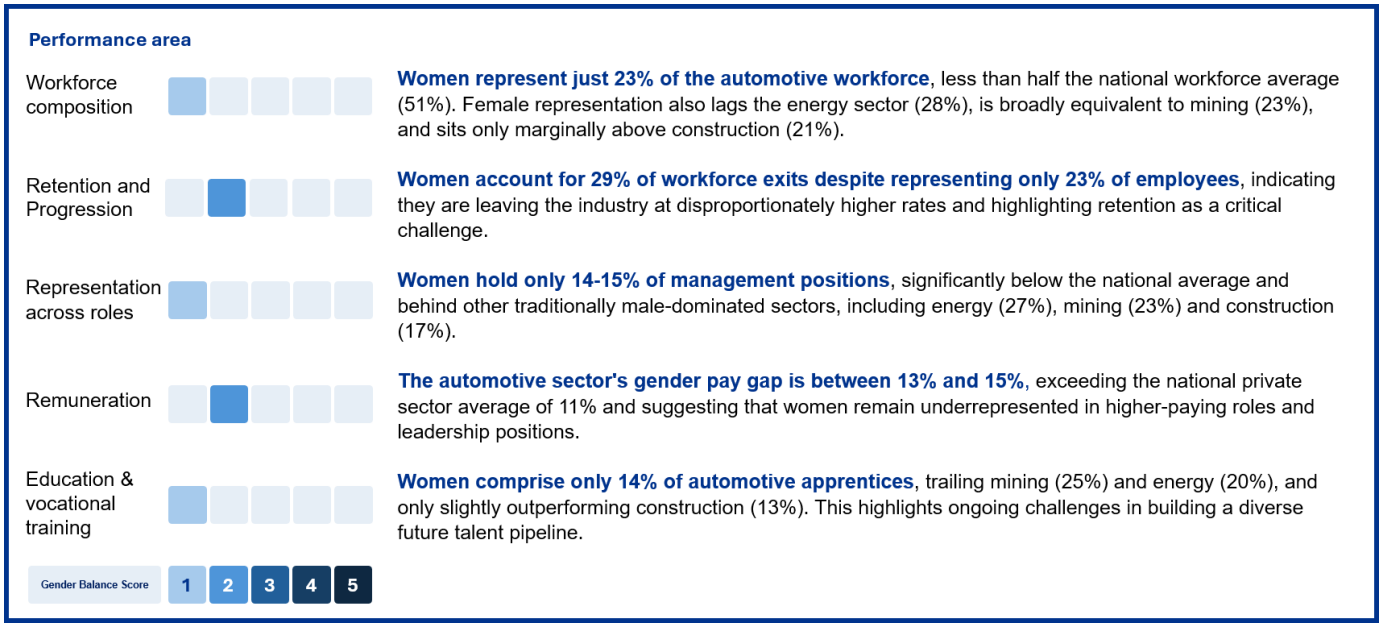
Opportunities

2 How is the sector currently performing?

This section provides an overview of the current state of gender diversity in the automotive dealer sector, as well as overall industry performance. It explores the industry's economic contribution, workforce composition and demographic profile, as well as key trends in employment and vocational pathways. These insights establish a baseline understanding of the sector's workforce and labour market dynamics, highlighting both areas of strength and emerging pressures.

Despite growing recognition of the business benefits associated with gender diversity, outcomes across the automotive dealer sector remain well below both national benchmarks and many comparable industries. Women remain underrepresented throughout the workforce, experience higher rates of attrition, and are less likely to be represented in leadership and technical career pathways. Collectively, these trends suggest that the sector is not fully accessing the available talent pool at a time when workforce capability has become a critical business issue.

Figure 6: Australian automotive dealer sector industry score card (relative to national averages)



Refer to Table 9 in Appendix A for details on the Gender Balance Scorecard assessment.

The following section assesses the sector's performance across the following key factors:

- **Workforce composition**: Measures the representation of women across the workforce and provides an indication of the sector's ability to attract female talent.
- **Retention and progression**: Assesses whether women remain in the workforce at comparable rates to men, providing insight into employee experience, workplace culture and inclusion.
- **Representation across roles**: Examines the representation of women in management and leadership positions to assess career progression opportunities and leadership diversity.
- **Remuneration**: Evaluates differences in remuneration between women and men, highlighting potential disparities in reward and access to higher-paid roles.
- **Education and vocational training**: Assesses participation in training, development and career pathways that support future workforce and leadership diversity.

Collectively, these measures provide a holistic view of the sector's ability to attract, retain, develop and advance women, while identifying potential barriers to progression and inclusion. Further detail on the relationship between the underlying metrics and the resulting scorecard scores is provided in the Appendix A.

This section assesses gender diversity outcomes for the 49 AADA member organisations that reported through the WGEA Employer Census 2024-25, referred to throughout this report as AADA members. It is important to note that

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WGEA reporting is mandatory only for private sector employers with 100 or more employees. The 49 AADA member organisations captured in the Employer Census are therefore predominantly larger dealer groups and do not represent the full AADA membership, which includes a substantial number of smaller businesses not subject to WGEA reporting. Results should be read as indicative of larger member organisations rather than the membership as a whole. To the extent that smaller businesses have different workforce profiles, gender diversity outcomes across the full membership may differ from, and could be less favourable than, those reported here.

Results are benchmarked against:

- The car retailing industry (ANZSIC industry class 3911), the closest available WGEA benchmark for the automotive dealer sector. Where Australian Bureau of Statistics labour force data is used, the benchmark is the broader motor vehicle retailing industry (ANZSIC industry group 391), and this is noted where it applies.
- The electricity, gas, water and waste services industry (referred to as the energy sector), the construction industry and the mining industry. These comparators were selected because they are traditionally male-dominated industries with workforce gender profiles broadly comparable to automotive retailing, providing a more meaningful benchmark than national figures alone.
- The national workforce, representing all WGEA-reporting employers.

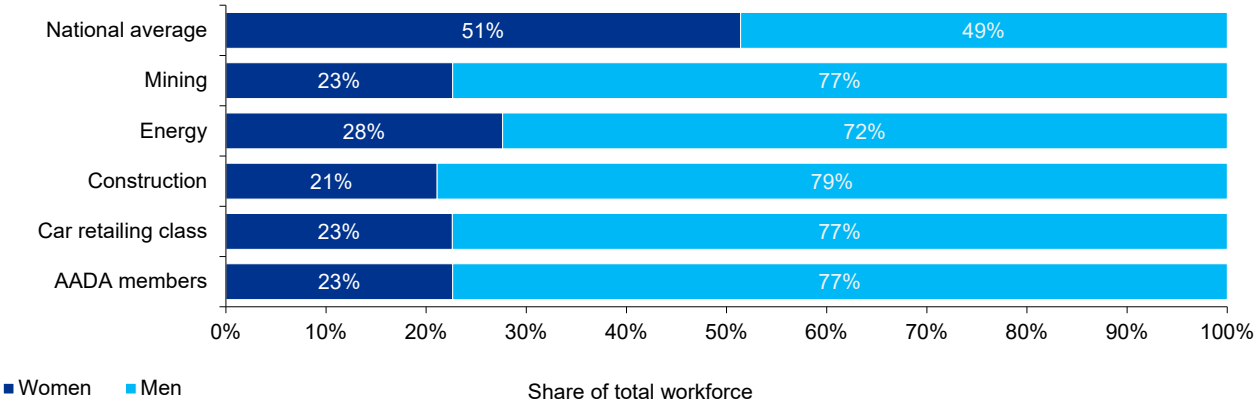
Throughout this report, the automotive dealer sector (or "the sector") is used as a broad term for the industry, encompassing new car retail, service, parts and corporate functions. References to a dealership denote an individual business or site.

2.1 Workforce composition

Businesses in the automotive dealer sector remain a heavily male-dominated workplaces. Women account for just 23 per cent of the workforce across both AADA member companies and the broader car retailing class, meaning fewer than one in four employees are women.[26] This is significantly below the national workforce average, where women make up around half of all employees, as shown in Figure 7.

The similarity in headline gender composition between AADA members and the broader car retailing class (WGEA, class 3911) suggests the reported cohort is broadly representative of the industry on this measure (see Section 2 for reporting coverage and limitations).

Figure 7: Gender representation across total workforce, 2025



Source: WGEA, Employer Census 2024-25

Note: AADA members refers to WGEA-reporting member organisations, representing approximately 20 per cent of the estimated AADA member workforce

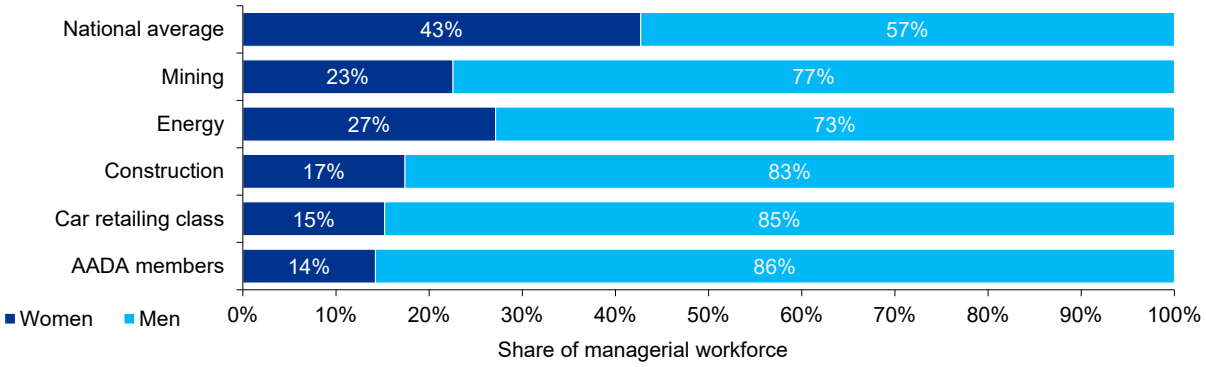
As illustrated in Figure 8, the gender gap is more pronounced in leadership roles. Leadership representation matters beyond the roles themselves: management positions shape workplace culture, influence hiring and promotion decisions, and provide the visible role models that support attraction and retention of women across the wider workforce. Low female representation in leadership therefore compounds the sector's participation challenge. Women hold only 14 per cent of management positions in AADA member companies and 15 per cent across the car retailing industry. This is nearly 30 percentage points below the national average for women in management

[26] The similarity between AADA members and the broader Car retailing class under WGEA (ANZSIC 3911) suggests that AADA membership is representative of the industry in terms of headline gender composition.

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(43 per cent) and lags other traditionally male-dominated industries, including construction (17 per cent), mining (23 per cent), and energy (27 per cent), as reflected in the graph below.

Figure 8: Gender representation across managerial roles, 2025

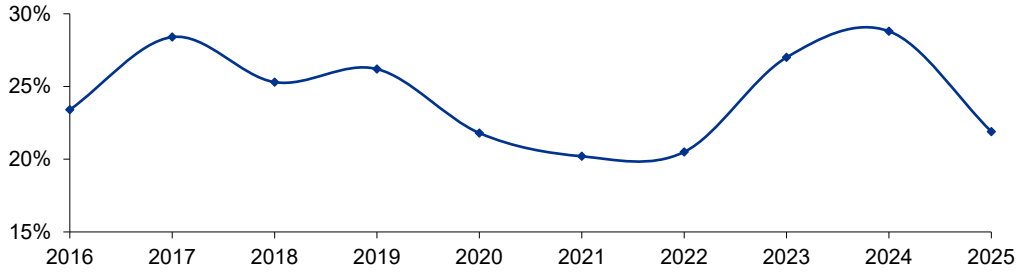


Source: WGEA, Employer Census 2024-25

Note: AADA members refers to WGEA-reporting member organisations, representing approximately 20 per cent of the estimated AADA member workforce

Gender representation in the Australian automotive dealer sector has remained consistent over the past decade. While female representation has fluctuated year to year, there is no evidence of any sustained upward or downward trend over time as illustrated below.

Figure 9: Female share of total Australian automotive dealer sector workforce, 2016 to 2025



Source: Australian Bureau of Statistics, Employed Persons by Industry Group of Main Job (ANZSIC 3911)

For a sector of its size and economic importance, persistently low female participation represents a structural constraint. While the automotive dealer sector has maintained relatively stable levels of female participation compared with other male-dominated industries, significant opportunities remain to broaden the talent pool from which the sector recruits. As competition for skilled workers intensifies, increasing the participation and progression of women will help businesses in the sector access a larger workforce, strengthen capability, and support future growth and transformation. This places businesses in the sector at a disadvantage in increasingly tight labour markets, limiting their ability to attract and retain the workforce needed for growth and transformation.

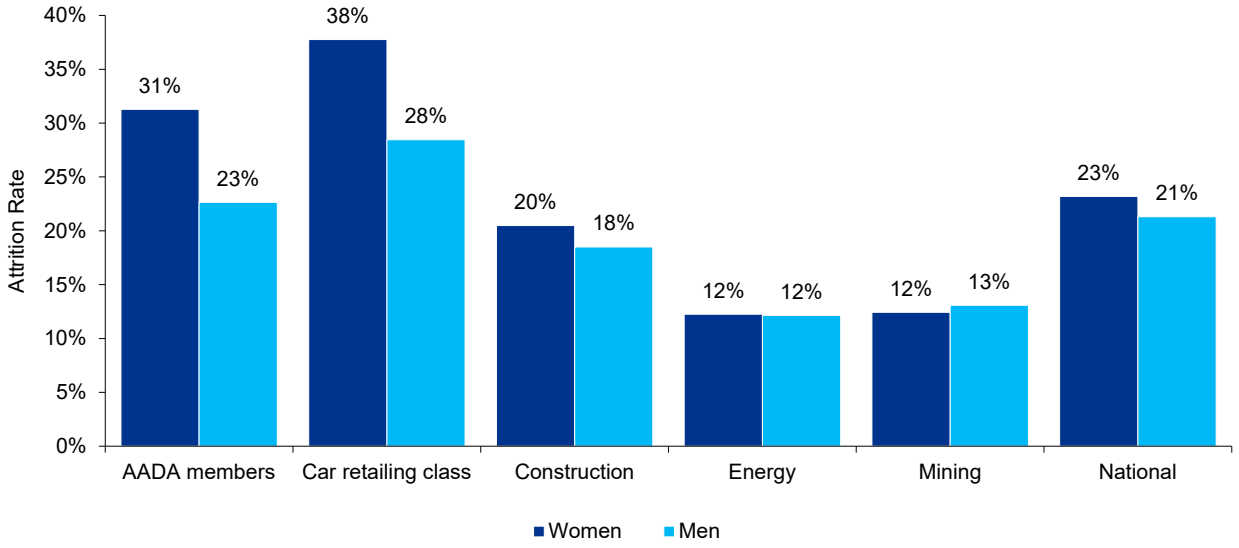
2.2 Retention and progression

Workforce movement data indicates that retention of female employees is a core challenge for the sector. Attrition in both AADA members and the car retailing industry is substantially higher than in comparable male-dominated industries and the national benchmark, and the gap is most pronounced for women. Across AADA members, 31 per cent of female employees exited their roles in 2024-25 compared with 23 per cent of male employees, while in the car retailing industry attrition reached 38 per cent for women against 28 per cent for men. By contrast, female attrition was 20 per cent in construction, 12 per cent in energy and 12 per cent in mining, at or near male rates in each case, and 23 per cent nationally. Attrition rates for women are significantly higher than those for men across both AADA member organisations and the broader automotive dealer sector and are higher than those observed in comparable male-dominated industries. This suggests that the sector is losing female employees at disproportionate rates which can constrain efforts to improve workforce diversity, reduce the pool of experienced

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female talent available for progression into leadership roles, and increase recruitment and training costs associated with replacing departing employees.

Figure 10: Attrition rate across industries by gender (2025)

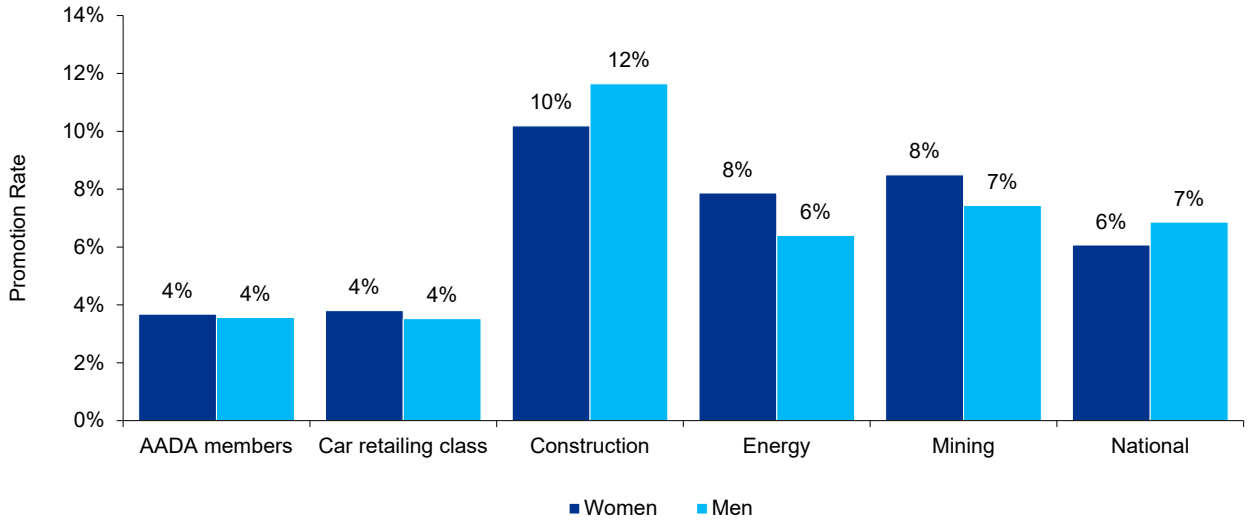


Source: WGEA, Employer Census 2024-25

Note: AADA members refers to WGEA-reporting member organisations, representing approximately 20 per cent of the estimated AADA member workforce

Promotion rates, by contrast, are broadly comparable across genders. Women were promoted at a similar rate to men overall (just under 4 per cent), as shown in Figure 11. This is consistent with promotions from non-manager to manager roles (0.8 per cent compared with 0.9 per cent). This indicates that underrepresentation at senior levels is driven less by unequal promotion rates than by the combination of a small pool of women in feeder roles and higher female attrition.

Figure 11: Promotion rate across industries by gender (2025)



Source: WGEA, Employer Census 2024-25

Note: AADA members refers to WGEA-reporting member organisations, representing approximately 20 per cent of the estimated AADA member workforce

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Parental leave and workforce participation patterns provide further insight into where attrition is concentrated. Among AADA members, women account for approximately 98 per cent of primary carer leave and the vast majority of exits during or following parental leave periods.[27] When considered alongside national workforce patterns, where women work part-time at higher rates than men in every industry yet 92 per cent of manager roles are held on a full-time basis,[28] the data suggests a structural misalignment between career progression pathways and flexibility requirements.

These patterns are consistent with attrition being concentrated around the parental leave and return-to-work life stage rather than distributed evenly across careers. Women account for 85 per cent of AADA member employees who ceased employment during paid parental leave and represent 29 per cent of all resignations despite comprising 23 per cent of the workforce. At the same time, women are promoted at rates broadly in line with their workforce share (23 per cent of all promotions), yet their representation declines steadily with seniority, from 16 per cent of other manager roles to 12 per cent of senior managers and 8 per cent of CEOs. Taken together, this points to retention, rather than a lack of advancement opportunities, as the primary constraint on female representation at senior levels: women are progressing into management at comparable rates but are not being retained long enough, in sufficient numbers, to sustain the pipeline into senior leadership.

In effect, businesses in the sector are investing in developing female talent but are not retaining it. This represents a direct loss of capability, leadership potential, and return on investment in training, concentrated at precisely the career stage where employees would otherwise progress into senior roles.

Comparator sectors have moved to institutionalise the conditions that support mid-career retention: flexible working policies are in place at 96 per cent of energy sector employers, 92 per cent in mining and 85 per cent in construction, compared with just 47 per cent of AADA members.[29] Without similar adaptation, the sector risks falling behind in building sustainable leadership pipelines, particularly as workforce expectations continue to evolve.

Consultation feedback reinforced this, with businesses that have introduced flexible arrangements describing them as a recent departure from historically rigid full-time-only roles:

> ***"We looked at [implementing] job sharing, staggered start times, part-time work, and casual work. Prior to this, there was just no part-time work at all. They would not allow any [flexibility]. If you had a child, they wouldn't let you come back. They would say, 'I'm sorry, there's no part-time job. Either work full-time or don't come back'."*** *– Human Resources, Large Corporate Dealership (SA)*

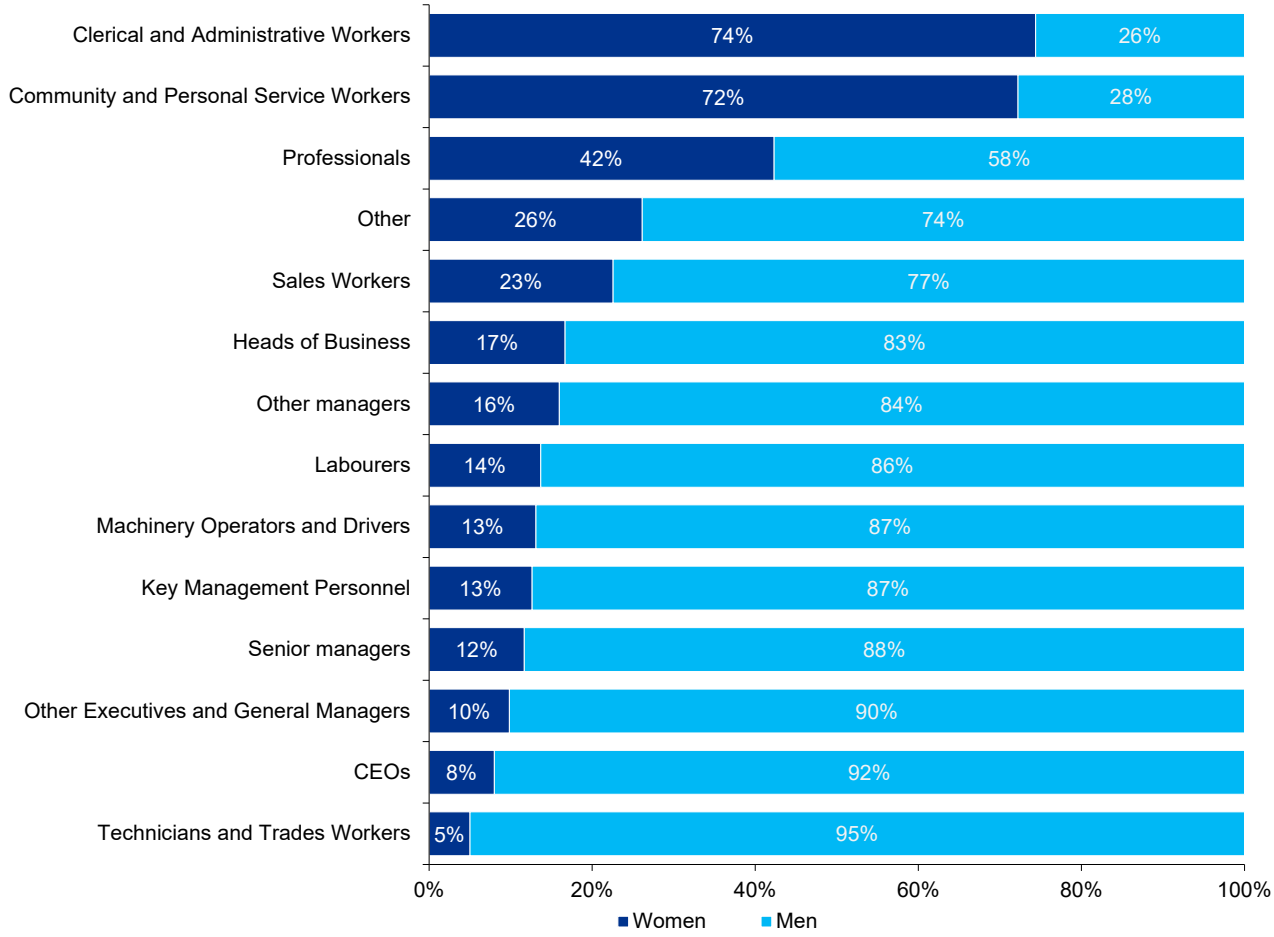
2.3 Representation across roles

Female representation in the Australian automotive dealer sector is not only low overall, but highly uneven across roles. As illustrated in Chart 6, women are concentrated in clerical and administrative roles, where they account for 74 per cent of employees in those roles. Representation declines across higher-value roles, with women holding a smaller share of sales and professional positions, and just 5 per cent of workshop trade roles (Figure 12). Women are also significantly underrepresented in manager level roles and above holding less than 20 per cent of these roles across AADA members. The gender concentration in trades is particularly significant. Trade roles are the largest occupational group in the automotive dealer sector.[30]

[27] WGEA (2025) Employer Census 2024-25. [accessed: https://www.wgea.gov.au/data-explorer]
[28] WGEA (2025) Australia's Gender Equality Scorecard 2024-25 (November 2025). [accessed: https://www.wgea.gov.au/publications/australias-gender-equality-scorecard]; WGEA (2025) Ages and Wages. [accessed: https://www.wgea.gov.au/publications/ages-and-wages-2025]
[29] WGEA (2025) Employer Census 2024-25. [accessed: https://www.wgea.gov.au/data-explorer]
[30] WGEA (2025) Australia's Gender Equality Scorecard 2024-25 (November 2025). [accessed: https://www.wgea.gov.au/publications/australias-gender-equality-scorecard]; WGEA (2025) Ages and Wages. [accessed: https://www.wgea.gov.au/publications/ages-and-wages-2025]

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Figure 12: Gender representation by occupation, AADA members (2025)



Source: WGEA, Employer Census 2024-25

Note: AADA members refers to WGEA-reporting member organisations, representing approximately 20 per cent of the estimated AADA member workforce

Other traditionally male-dominated sectors have made more visible progress in addressing occupational segregation through targeted apprenticeship pathways and recruitment initiatives.

Case study: Targeted apprenticeship pathways as the entry point for women in trades

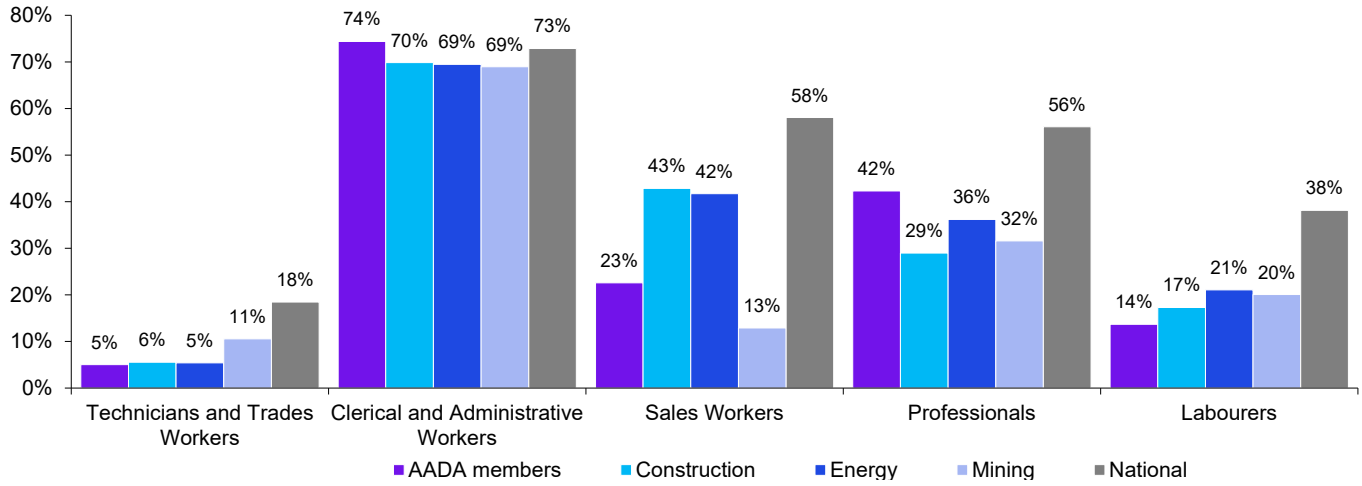
Rail, like automotive retail, has historically drawn its technical workforce and operational leadership from male-dominated trades, with women representing a small minority of apprentices and tradespeople. Sydney Trains set out to shift this at the entry point, through targeted recruitment of women into engineering and maintenance careers, dedicated apprenticeship pathways into traditionally male-dominated rail trades, and investment in specialised skills-development facilities and retention programs for women completing their training.

The results demonstrate that occupational segregation can be shifted through deliberate intervention. Women represented 11 per cent of all Sydney Trains apprentices in 2026, following a 50 per cent increase in the annual female apprentice intake, while more than 93 per cent of women completing apprenticeships since 2022 have secured ongoing employment.[31] For the automotive dealer sector, where women hold just 5 per cent of trade roles and the apprenticeship pathway feeds directly into service management and operational leadership, the Sydney Trains experience shows that the composition of the future leadership pipeline can be changed by acting where careers begin.

[31]NSW Government (2026). Sydney Trains boost women in trades as new skills centre prepares next generation of rail talent. [accessed: https://www.nsw.gov.au/ministerial-releases/sydney-trains-boost-women-trades-as-new-skills-centre-prepares-next-generation-of-rail-talent]

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Figure 13: Female representation in key occupations, AADA members, national and comparator industries (2025)



Source: WGEA, Employer Census 2024-25

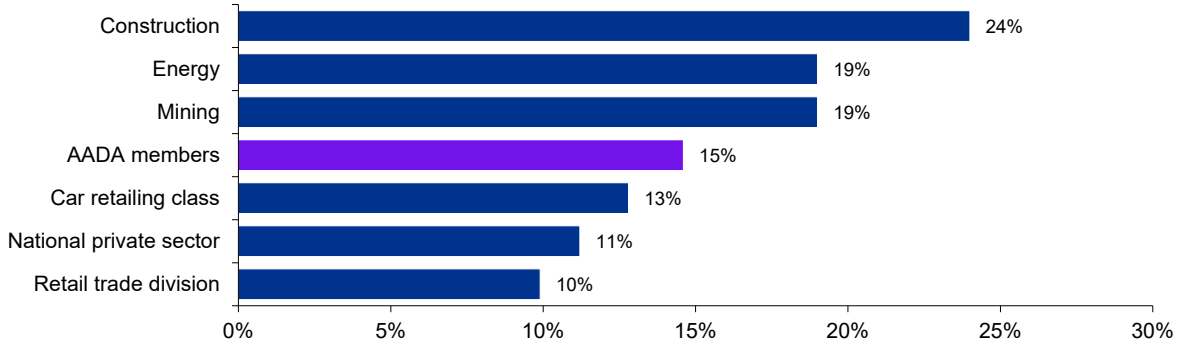
Note: AADA members refers to WGEA-reporting member organisations, representing approximately 20 per cent of the estimated AADA member workforce

This occupational structure has the potential to constrain the advancement of women into future leadership roles. Service and operational management roles in dealer businesses typically require technical experience gained in the workshop, meaning trade roles function as the entry point to the sector's operational leadership pathway. Among AADA members, women hold just 5 per cent of trade roles (Figure 12) and 12 per cent of senior manager positions (Figure 13), and their representation declines at each successive management tier. The pathway through which operational leaders typically emerge is therefore one that women rarely follow. Without intervention, this will continue to limit both leadership gender diversity and the availability of skilled leaders, particularly as demand for technical capability grows with electrification and digital transformation.

2.4 Remuneration

AADA members exhibit a wider gender pay gap than the populations they sit within.[32] The mid-point of AADA member gender pay gaps is 15 per cent, meaning half of AADA members report a gap above this level and half below. This exceeds the equivalent mid-point for the car retailing class, the wider retail trade division, and the national private-sector benchmark of 11 per cent. While not as large as the gaps observed in mining, construction and the energy sector, it places AADA members toward the higher end of the industry range, as shown in Figure 14.

Figure 14: Mid-point gender pay gap comparators, 2025



Source: WGEA, Employer Gender Pay Gaps dataset, 2024-25

Note: AADA members refers to WGEA-reporting member organisations, representing approximately 20 per cent of the estimated AADA member workforce

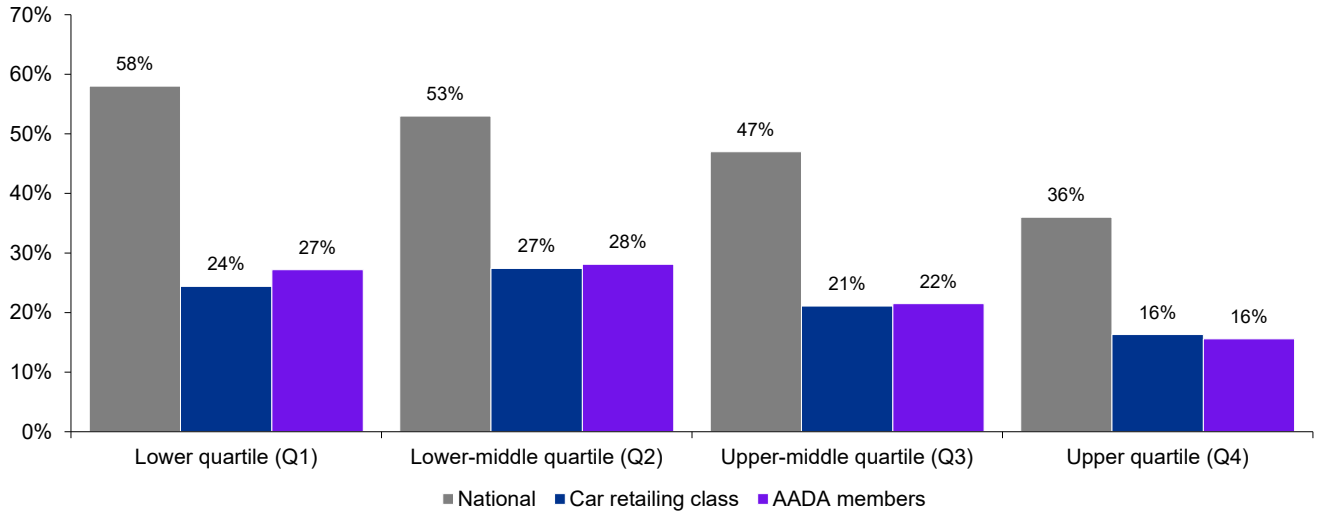
[32]Gender pay gaps are each employer's average total remuneration gap, with group figures shown as the mid-point of employer-level gaps. The gender pay gap is not a measure of unequal pay for equivalent work. The full method is set out in Appendix A: Quantitative Analysis.

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Importantly, the AADA member pay gap is not primarily driven by differences in pay within like roles, but by where women sit across the pay distribution. Among AADA members, women are concentrated in lower-paid functions and are underrepresented in higher-paying roles, including trades, sales and senior leadership (Figure 12)

Pay quartile data reinforces this point. Women's share of AADA members' two lower pay quartiles (27 and 28 per cent) exceeds their overall workforce share of 23 per cent, while their share of the highest-paid quartile (16 per cent) falls well below it, as shown in Figure 15. The same skew is evident in the car retailing class. While the gap to the national figures largely reflects women's lower overall participation in the sector, the tilt within the sector's own quartiles reflects the same structural segregation observed in workforce composition: women are not only fewer in number, but disproportionately absent from the sector's best-paid roles.

Figure 15: Female workforce composition by pay quartile, 2025



Source: WGEA, Employer Gender Pay Gaps dataset, 2024-25

Note: AADA members refers to WGEA-reporting member organisations, representing approximately 20 per cent of the estimated AADA member workforce

The quartile patterns above are not unique to the automotive dealer sector; similar skews are evident across other male-dominated industries. Where measurable progress has been made, it has come through sustained, deliberate intervention. Within automotive retail itself, the clearest example is the United Kingdom, where dealer groups have achieved significant improvement in female representation and leadership through coordinated, CEO-led commitment, as outlined in the case study below.

Case study: CEO-led commitment to gender balance in UK automotive retail

The Automotive 30% Club is a voluntary network of chief executives from UK automotive retail, manufacturing and supplier businesses, founded with the aim of filling at least 30 per cent of key leadership positions with women by 2030. Its members include some of the UK's largest dealer groups. The club operates without quotas, relying instead on CEO-level commitment: members share what has worked in their businesses through structured forums on talent attraction, promotion and retention, run public campaigns featuring female role models in technical and leadership roles, and partner on apprenticeship initiatives that promote automotive careers to women.

In January 2026, the club announced it had reached its 30 per cent leadership target five years ahead of schedule. Women now make up 32 per cent of the combined workforce across member organisations, which together employ around 115,000 people, compared with 19 per cent across the wider UK automotive sector. The club attributes this progress to sustained leadership attention and the systematic removal of bias from the policies and processes that had historically excluded female talent, noting that removing these barriers widened members' access to high-performing talent pools. For the Australian automotive dealer sector, the experience demonstrates two things: that meaningful change in gender balance is achievable within automotive retail itself, and that it moves fastest when dealer group leaders drive it directly rather than delegating it as a compliance exercise.[33]

[33]Automotive Management (2026) *Automotive 30% Club hits 30% female leadership target five years early*. [accessed: https://www.am-online.com/news/automotive-30-club-hits-30-female-leadership-target-five-years-early]; The Automotive 30% Club, *About the Club*. [accessed: https://www.automotive30club.co.uk]

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For AADA members, the message is similar. The gender pay gap is a visible symptom of deeper structural issues. It signals not only inequity in outcomes, but inefficiency in how talent is allocated and developed. For CEOs and business leaders, this represents both a reputational risk and a performance issue, particularly as transparency around pay and ESG metrics continues to increase. Addressing the drivers of the pay gap is therefore central to improving both workforce equity and overall business performance.

2.5 Education and vocational training

Education and vocational trends in car retailing

It is estimated that Australia faces approximately 40,000 unfilled mechanic and automotive technician roles nationwide and as many as 40 per cent of these will go unfilled[34]. This is despite many automotive technical roles being on the government Occupation Shortage List for over a decade[35].

National Centre for Vocational Education Research data indicates that apprentice and trainee commencements in Automotive[36] fell significantly in 2012-14 and have been in a stable long-term trend at around 3,500-4,000 new apprentices each year, approximately one-third of the level in 2012.

The proportion of women commencing automotive apprenticeships has trended positively over the past decade to 11 per cent in 2025, but at a modest annual growth rate.[37] However, the female share of automotive apprenticeships has not kept up with growth in comparator sectors of Construction and Mining. In particular, the proportion of women entering apprenticeships in the mining sector has doubled over the decade from 8 per cent to 17 per cent.[38]

Stakeholder consultations with AADA member executives and their staff in areas of Queensland and Western Australia highlighted the intense competition they face from the mining sector to attract and retain qualified apprentices. The primary driver of this is the significantly higher salaries on offer compared to the earning capacity in automotive retail roles.

This is reflected in completion rate of apprenticeships across sectors. In the period of 2012-23, 51 per cent of male apprentices compared to only 43 per cent of females in automotive managed to complete the qualification. In Construction the situation was slightly better at 52 per cent of males and 49 per cent of females completing their apprenticeship. However, in Mining 62 per cent of males and 63 per cent of females completed their apprenticeship.[39]

This highlights that the availability of education and vocational training is not sufficient. The must be clear pathways for apprentices, with suitable incentive and compensation, to encourage them to complete their qualification and remain in the sector.

Figure 17: Commencing automotive apprenticeships

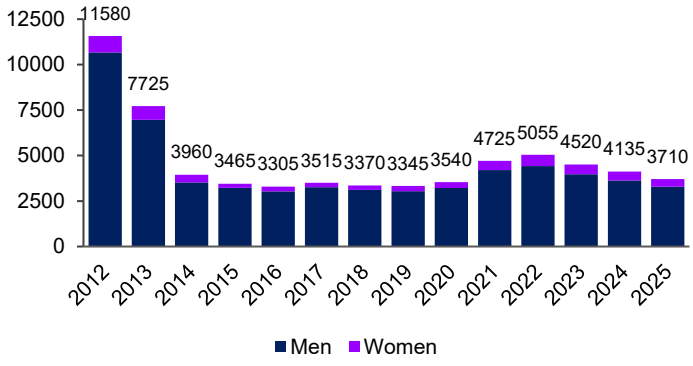
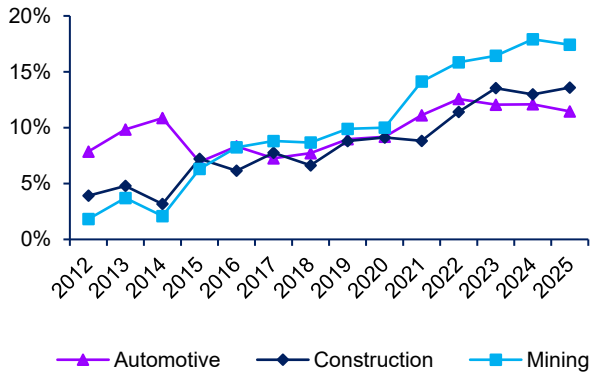


Figure 16: Proportion of female apprentice commencements



[34] Australian Automotive Dealer Association, 2025 Core Skills Occupation List Submission
[35] Jobs and Skills Australia [accessed: https://www.jobsandskills.gov.au/data/occupation-shortage/occupation-shortage-list]
[36] National Centre for Vocational Education Research DataBuilder, [accessed: https://www.ncver.edu.au/databuilder/index.html]. Includes AUR30405 - Cert III in Automotive Mechanical Technology, AUR30605 - Cert III in Automotive Specialist, AUR30308 - Cert III in Automotive Electrical Technology, AUR31005 - Cert III in Automotive Sales, AUR32412 - Cert III in Automotive Refinishing Technology, AUR30805 - Cert III in Automotive Vehicle Body
[37] Ibid.
[38] Ibid.
[39] Ibid.

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Source: NCVER apprenticeships DataBuilder (2012-25)

Case study: Financial incentives for trainees to grow their skills

A prestige dealer recognised the importance of incentivising apprentices as an effective feature of their employer value proposition and used it to attract and retain talent in a tough market. The leadership devised a structured program of development for apprentices, providing a transparent pathway the recruits could visualise their progression and the financial incentives they would be rewarded with for achieving each milestone.

The program provides apprentices with extra perks, remuneration and bonus payments as rewards for moving up through a defined skills progression pathway, according to their specialism.

The HR leader described the program to apprentices as "*for those who are willing to invest [time] … we're willing to invest in your development, we're willing to invest in your training, and we'll pay you for it once you get the certification. And that payment will continue.*"

The focus for this group has been maintenance, systems and diagnostic certifications. The program success has been led to endorsement and certification by the vehicle OEM.

The benefit of this program for the business has been the high (over ninety per cent) completion rate for apprentices who move into permanent roles and the extended retention with graduates staying on for an average of three to five years.

Drivers of differences in attrition

Across automotive retail, as well as the identified comparators there are several well-established barriers that would be expected to contribute to higher female attrition in apprenticeships. Evidence across the apprenticeship system suggests that women are more likely to experience isolation as a very small minority, weaker informal support networks, poorer access to meaningful development opportunities, and greater exposure to unsupportive supervision and poor working conditions once they enter a trade pathway. These pressures are compounded by the fact that women are more likely to commence apprenticeships later in life, when lower training wages and limited flexibility can create additional barriers to completion. In this sense, some portion of the gender attrition gap observed in car retailing is likely reflective of broader structural issues that also affect women in other low-participation industries such as construction, mining, energy and related technical trades, rather than a dynamic unique to automotive alone.

However, unlike construction, mining and energy, car retailing sits at the intersection of broader trade-based barriers and a set of additional workplace dynamics inherent to the sales element of the role that may intensify them. In customer-facing dealership roles, women can be exposed to gendered treatment from colleagues and supervisors, as well as from customers. This is consistent with broader apprenticeship survey evidence showing relatively high exposure to workplace bullying among non-completers in sales roles more broadly, and with automotive research highlighting that women in the sector commonly face belittling comments and a need to continually prove legitimacy in roles still widely perceived as male. On that basis, the larger attrition delta in car retail may reflect a compounding effect, as women are not only entering a male-dominated trade environment, but also one shaped by the additional expectations and frictions of sales and customer service work.

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03

Performance

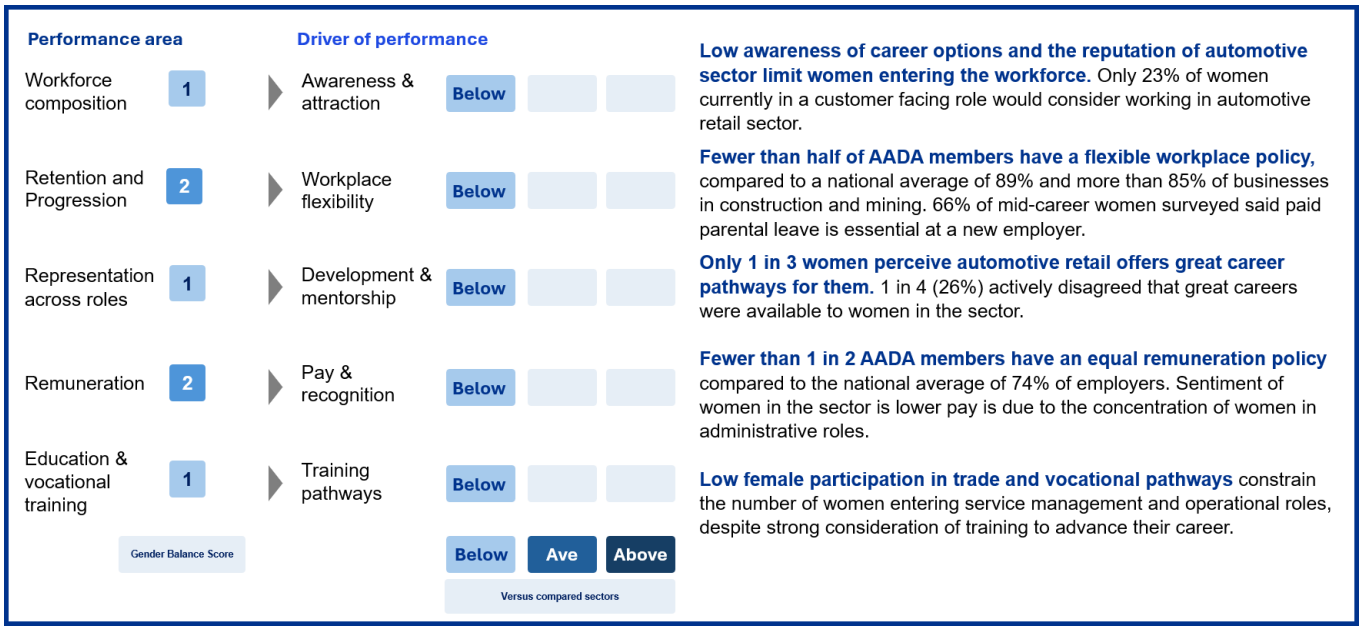
Drivers

Opportunities

3 What is driving performance?

The workforce outcomes observed across the automotive dealer sector are shaped by a combination of sector perceptions, workforce practices, and structural factors that influence how women are attracted, recruited, retained, and progressed. While low representation is often viewed as a pipeline issue, stakeholder consultations suggest the challenges extend across the entire employee lifecycle, from awareness of dealership careers, through to advancement into senior leadership positions.

Figure 18: Australian automotive dealer sector industry performance scorecard



Refer to Table 9 in Appendix A for details on the Gender Balance Scorecard assessment.

This section explores the key performance drivers identified in direct consultations and a survey of women working outside of the automotive sector, as contributing to current performance outcomes.

- **Awareness and attraction**: Assesses the consideration and reputation of the automotive retail sector by women as an indication of the sector's ability to attract female talent.
- **Workplace flexibility**: Evaluates the essential and important benefits for women when seeking new employment.
- **Development and mentorship**: Assesses the perception of the sector in providing career advancement opportunities for women and the role of informal or formal mentors in supporting their development.
- **Pay and recognition**: Considers the approach to equitable remuneration policy in the sector and the importance of salary in choosing a new employer.
- **Training pathways**: Assesses participation in training, development and career pathways that support future workforce and leadership diversity.

This chapter examines how perceptions of the sector influence attraction, the barriers that affect entry into the sector, the workplace experiences that shape retention, and the factors influencing career progression and leadership representation. Together, these insights provide important insight into why gender representation has remained largely unchanged over time and where opportunities for improvement exist.

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3.1 Awareness and attraction

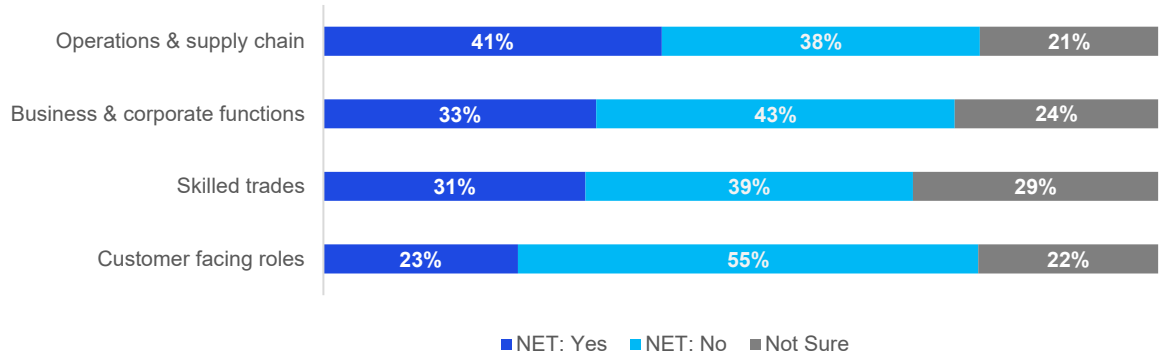
Visibility and awareness

Low awareness and consideration of automotive retail careers emerged as one of the earliest and most significant barriers to increasing female participation in the sector. Stakeholders consulted consistently noted that many women have limited exposure to the breadth of careers available within dealerships prior to entering the workforce, with awareness often confined to traditional perceptions of mechanics and vehicle sales.

> ***"You don't realise from the outside looking in what career pathways are available at a car dealership… You just think you sell cars or you're a mechanic."*** *– Dealer Principal, Large Corporate Dealership (QLD)*
>
> ***"You can't aspire to be what you can't see ... if it's not visible, you don't know it's an available pathway."*** *– Dealer Principal, Large Corporate Dealership (QLD)*

As a result, career opportunities across customer service management, finance, operations, human resources, technology, and leadership are frequently overlooked. This is particularly significant given that women working in roles with highly transferable skills are among the most likely to consider a career in automotive retail. Survey findings show that women in operational and supply chain roles are the most likely to consider working in the automotive dealer sector (41 per cent), followed by those in business and corporate functions (33 per cent).

Figure 19: Consideration to work in the Australian automotive dealer sector by current role



Q. Would you consider working in these industries? (Operation & supply chain n=83, Business & corporate functions n=200, Skilled trades n=62, Customer facing roles n=348) NET: Yes = Yes, definitely + Yes, probably, NET: No = No, definitely not + No, probably not

Source: AADA Survey Data (2026)

Academic research highlights that exposure to visible role models and information about career pathways plays a significant role in shaping career aspirations in traditionally male-dominated industries.[40] Consultation with stakeholders revealed that careers in automotive retail are rarely promoted through schools, career advisors, or tertiary pathways as a career option for women. Increasing visibility of the sector's diverse career opportunities through schools and early career education initiatives will be critical to broadening awareness, challenging misconceptions, and encouraging more young women to consider automotive as a future career pathway.

Reputation of sector

Through consultation, stakeholders expressed that sector reputation remains a significant barrier, as perceptions of automotive retail as a male dominated sector discourage many women from considering a career in the sector.

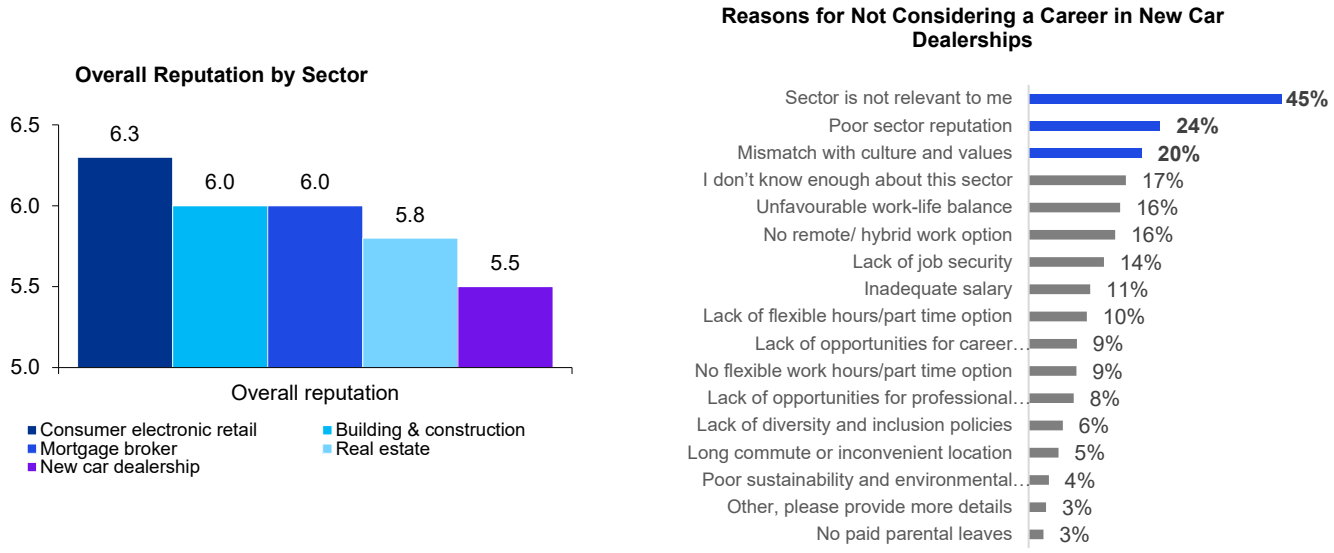
[40] Dasgupta, Nilanjana. (2011). Ingroup Experts and Peers as Social Vaccines Who Inoculate the Self-Concept: The Stereotype Inoculation Model. Psychological Inquiry. 22. 231-246. Available at: https://www.researchgate.net/publication/254310678_Ingroup_Experts_and_Peers_as_Social_Vaccines_Who_Inoculate_the_Self-Concept_The_Stereotype_Inoculation_Model

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> ***"We're fighting against a preconception of what our industry is like … there is a stigma against our industry."*** – *Human Resources, Small-to-medium sized Dealership (NSW)*
>
> ***"There is a stigma … it is more a male dominated industry."*** – *Dealer Principal, Small-to-medium sized Dealership (TAS)*

Survey findings echo this, with almost a quarter of women (24 per cent) citing the sector's poor reputation as a reason they would not consider a career in automotive retail. The most cited reason was that the sector lacked relevance to them (45 per cent). Persistent stereotypes and the limited visibility of women in automotive retail can further reinforce perceptions that the sector is not relevant to women. Reflecting these challenges, new car dealerships received the lowest reputation rating of all industries assessed, scoring an average of 5.5 out of 10 (where 10 represents a highly positive reputation and 0 represents a highly negative reputation).

Figure 20: Reputation of the Australian automotive dealer sector



Q. How would you rate the overall reputation of the following sectors? (Total Sample n=754) Scale of 1 to 10 where 10 represents a highly positive reputation and 0 represents a highly negative reputation

Q. Why would you not consider working in Automotive - New car dealerships? (Those who would not consider n=351)

Source: AADA Survey Data (2026)

For dealerships, this presents a dual challenge, attracting women into the sector and changing perceptions among individuals who may never have direct exposure to a dealership workplace. Leaders in the industry suggested that improving the visibility of women working successfully across different dealership functions could help challenge existing stereotypes and broaden perceptions of the sector.

3.2 Entry barriers

Training pathways

Stakeholders identified training pathways as one of the most significant structural constraints on female participation in automotive retail. This was particularly evident in technical and trade occupations, where female representation remains extremely low. Several stakeholders noted that dealerships draw heavily from apprenticeship and vocational education pathways that have historically attracted very few women. This is reflected in NCVER data, which shows that more than 500 apprenticeships commence in car retailing each year on average, yet women account for just 14 per cent of these commencements. As a result, dealerships often compete for a small number of female candidates within already limited talent pools. This challenge is evident across the broader Australian apprenticeship system. While women represent almost half of the Australian workforce, they account for

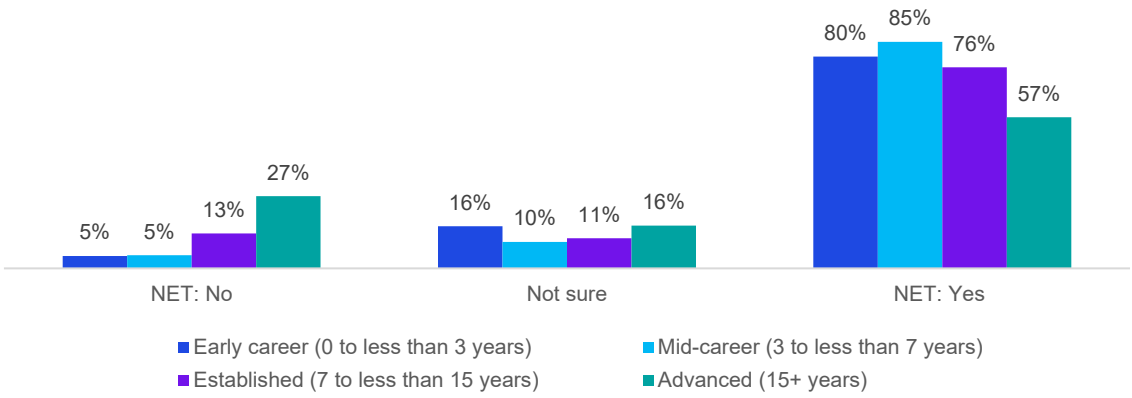
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only around 28 per cent of apprentices and trainees nationally,[41] reflecting longstanding gender segregation within vocational pathways. Research suggests that women entering trade pathways frequently encounter barriers including workplace culture challenges and lower levels of support and mentoring.[42]

> ***"I do think that there's gender bias. I think it's male-dominated workshops [and given] the culture of what goes on in some workshops… it's a harder path to forge"*** – *Executive, Large Corporate Dealership (VIC)*

Despite these challenges, survey findings indicate strong interest in vocational pathways among women open to a career in automotive retail. More than three quarters (77 per cent) said they would consider undertaking an apprenticeship or traineeship to advance their career, demonstrating the potential of these pathways to attract new female talent. Interest was particularly strong among women in the mid-career (85 per cent) and early career (80 per cent) stages, highlighting a significant opportunity to increase female participation through well promoted, accessible, and inclusive training pathways.

Figure 21: Likelihood of considering an apprenticeship or traineeship among women considering a career in the automotive dealer sector



Q. Would you consider pursuing an apprenticeship or traineeship to develop new skills or advance your career? (Early career n=45, Mid-career n=82, Established career n=66, Advanced n=32) NET: Yes = Yes, definitely + Yes, probably, NET: No = No, definitely not + No, probably not

Source: AADA Survey Data (2026)

Trade and vocational pathways often serve as an entry point into service management and broader operational leadership roles. Consequently, low female participation at the apprenticeship and traineeship level can have long term implications for gender diversity across leadership positions within the sector. Several stakeholders suggested that greater engagement with schools, vocational education providers, and industry training organisations could help improve awareness and participation earlier in the talent pipeline. The strong level of interest identified in the survey suggests that the challenge may be less about willingness to undertake training, and more about ensuring women are aware of these pathways, see them as accessible, and are actively encouraged to pursue them.

Recruitment

Stakeholders generally viewed recruitment processes in the automotive dealer sector as gender neutral. However, many acknowledged that traditional recruitment practices can inadvertently reinforce existing workforce patterns. For example, job advertisements, candidate sourcing channels, and employee referral networks often draw from historically male-dominated talent pools. Several stakeholders also noted that job descriptions can emphasise

[41] Smith, E. (2025) 'How women are disadvantaged in the Australian Apprenticeship System', The Economic and Labour Relations Review, 36(3), pp. 635–658. Available at: https://www.cambridge.org/core/journals/the-economic-and-labour-relations-review/article/how-women-are-disadvantaged-in-the-australian-apprenticeship-system/19BAE6388CE60C527023936CCD25425C

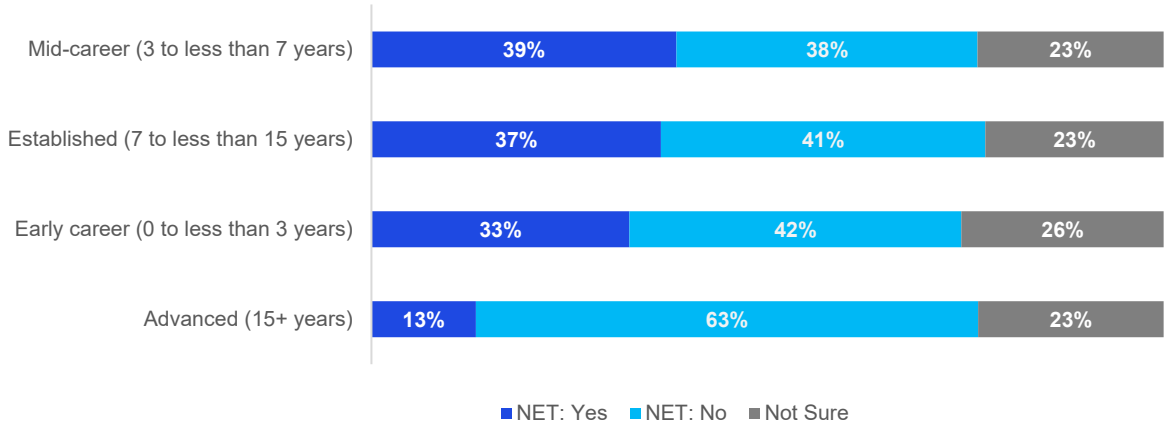
[42] Ross, I. and Paul, L. (2024) Strategic review of the Australian apprenticeship incentive system – fact sheet for women apprentices in male-dominated trades - department of employment and workplace relations, Australian government. Available at: https://www.dewr.gov.au/australian-apprenticeships/resources/strategic-review-australian-apprenticeship-incentive-system-fact-sheet-women-apprentice

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sector experience or technical knowledge in ways that discourage potential applicants from non-traditional backgrounds.

Survey findings highlight a particularly strong opportunity to attract women in the mid-career stage. Among women surveyed, those in the mid-career stage were the most likely to consider a career in automotive retail, with 39 per cent indicating they would consider working in the sector. This compares with just 13 per cent of women who were advanced in their careers (15+ years). These findings suggest that efforts to increase female recruitment may be most effective when focused on experienced professionals who are established in their careers and open to new opportunities but have not yet reached the later stages of their working lives.

Figure 22: Consideration to work in the automotive dealer sector by career stage



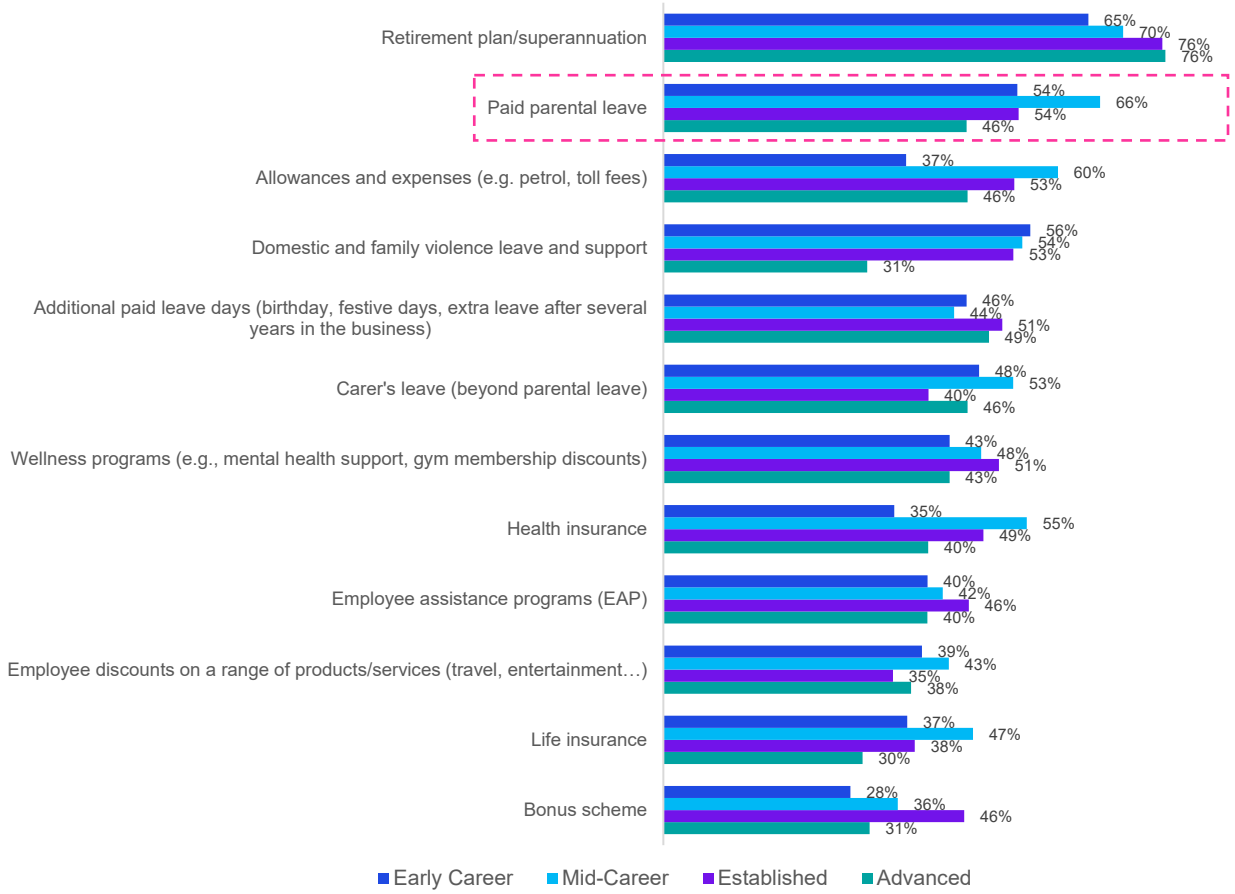
Q. Would you consider working in these industries? (Early career n=136, Mid-career n=211, Established n=179, Advanced n=228) NET: Yes = Yes, definitely + Yes, probably, NET: No = No, definitely not + No, probably not

Source: AADA Survey Data (2026)

For this group, employment benefits and workplace support can play a critical role in employer choice. Notably, paid parental leave emerged as a major factor influencing consideration, with 66 per cent of mid-career women identifying it as an essential employment offering. Given that many women at this career stage are balancing professional advancement with family responsibilities, family friendly policies may represent a significant opportunity for dealerships to strengthen their value proposition and attract experienced female talent.

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Figure 23: Essential employee benefits for those considering the automotive dealer sector by career stage



Q. Which of the following employee benefits are essential, nice to have or neither of them, when considering a new employment? (Early Career n=45, Mid-career n=82, Established n=66, Advanced n=32,)

Source: AADA Survey Data (2026)

Importantly, stakeholders also consistently emphasised that hiring decisions are driven by skillset and cultural and personality fit rather than gender. Success in automotive roles was seen as being more closely linked to attributes such as adaptability, resilience, drive, and strong interpersonal skills. Many women working in the sector also expressed a preference to be recognised and rewarded on merit, rather than through quotas, citing concerns about perceptions of being hired simply to "tick a box."

> ***"If you can do the job then and you show potential, it doesn't matter whether you're male or female, you've just got to be the right person."*** *– Dealer Principal, Large Corporate Dealership (QLD)*
>
> ***"We're not doing something for ticking a box. We're not just doing something for the sake of it. If we're doing something, it's got to be meaningful." –*** *Human Resources, Large Corporate Dealership (QLD)*

Some dealerships reported success when taking a more proactive approach to recruitment, including reviewing job advertisements, broadening sourcing strategies, and actively encouraging applications from women. However, these practices were not consistently applied across the sector. Overall, stakeholders viewed recruitment as an important enabler of greater female participation, but not the primary driver of current workforce outcomes. Broader attraction and talent pipeline challenges facing the sector were seen as more significant barriers to increasing female representation.

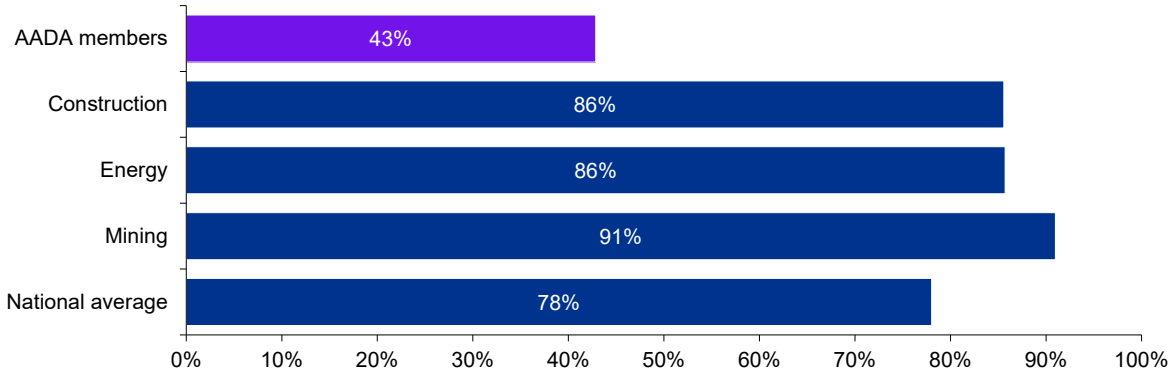
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3.3 Workplace experience

Culture and inclusion

Workplace culture and inclusion emerged as one of the most significant barriers to attracting and retaining women in the automotive dealer sector. As shown in Chart 17, WGEA data revealed that just 43 per cent of AADA members have diversity and inclusion policies, which is almost half the rate of comparator industries such as construction, energy and mining, and significantly below the national average. This implies that many dealerships may not yet have formal frameworks to guide inclusive workplace practices, respond to workplace issues or communicate expectations regarding behaviour and culture.

Figure 24: Share of employers with a diversity and inclusion policy or strategy, AADA members and comparator industries, 2024-25



Source: WGEA, Employer Census 2024-25

Note: AADA members refers to WGEA-reporting member organisations, representing approximately 20 per cent of the estimated AADA member workforce

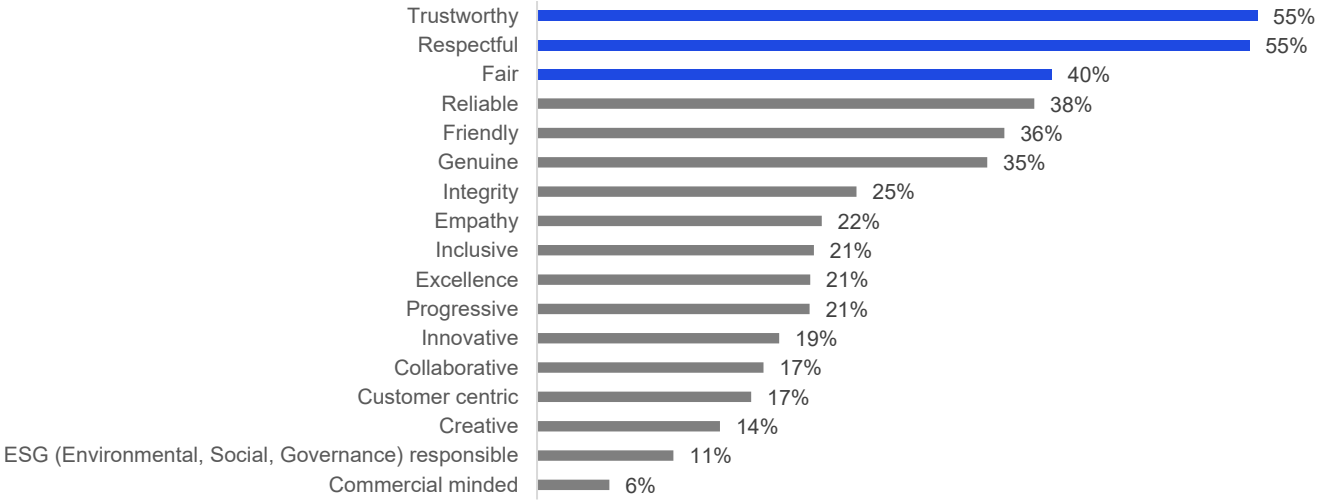
Stakeholders described an enduring perception of dealership environments as "boys' clubs", shaped by experiences of sexist attitudes, bullying, harassment, and workplace behaviours that have historically been tolerated or overlooked. In consultations, women working in the sector expressed feeling pressure to adapt to established workplace norms, developing a "thick skin" to navigate challenging workplace dynamics, with stakeholders describing during consultations:

> ***"This 'boys club' mentality … a lot of it is the way they were brought up in dealership land as well when they started. That's how it used to be and that's how they've continued it…"*** *– General Manager, Large Corporate Dealership (NT)*
>
> ***"Women felt it was very 'sharky'… some didn't enjoy that environment and left."*** *– Human Resources, Small-to-medium sized Dealership (NSW)*
>
> ***"When I first got here... the 'Wild West' was really what rang in my head, a lot of the stuff that was going on, the behaviours, the attitudes towards women."*** *– Executive, Large Corporate Dealership (QLD)*

Women working in the sector also described feeling they needed to work harder than their male counterparts to establish credibility, gain recognition, and access progression opportunities. False assumptions about women's technical knowledge, leadership capability, or suitability for certain roles continue to influence workplace experiences and career advancement. While these barriers were not universal across all dealerships, stakeholders noted that perceptions of culture can be just as influential as lived experiences in shaping women's decisions to enter, remain in, or leave the sector. For dealership CEOs and dealer principals, this highlights that improving female participation is not solely about recruitment. Retaining women within the sector requires workplaces where employees feel respected, supported, and able to succeed. This is reflected in the survey findings, which indicate that respect (55 per cent), trustworthiness (55 per cent), and fairness (40 per cent) are among the most important workplace values for women considering a career in automotive retail.

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Figure 25: Values important when considering a new employer among those considering the automotive dealer sector



Q. Which of the following values are the most important to you when considering a new employer? (Those who would consider automotive n=225)

Source: AADA Survey Data (2026)

As competition for talent continues to intensify, workplace culture is likely to become an increasingly important differentiator between dealerships that successfully attract and retain diverse talent and those that do not. Strong leadership, clear standards of behaviour, trusted reporting mechanisms, and visible commitment to inclusion therefore represent not only a workforce initiative, but an important component of long-term business sustainability and performance.

Importantly, consultations also revealed some evidence of positive change in the sector. Many dealership leaders acknowledged that workplace expectations have shifted over time, with stronger emphasis now being placed on respectful workplaces, accountability, and inclusion. Stakeholders highlighted examples where dealer principals and senior leaders had taken decisive action to address inappropriate behaviour, demonstrating the critical role leadership plays in setting expectations and shaping workplace culture, as shown in the case study below. These examples suggest that cultural change is achievable, but requires ongoing commitment, visible leadership, and consistent reinforcement of expected behaviours.

Case study: Dealer principals as the circuit breaker for poor behaviour

A female dealership employee described a workplace culture where inappropriate behaviour from a male manager went unchecked, creating discomfort and uncertainty for younger women in the business. According to the employee, women were subjected to late night messages, inappropriate comments, and conduct that repeatedly blurred professional boundaries. The issue was particularly concerning for younger female employees, who often felt reluctant to speak up given the power imbalance involved.

Reflecting on the impact of these behaviours, she noted that **“you can't feel like you're a piece of meat at work. It's just not comfortable. Because that's how people start leaving.”** The employee also highlighted broader patterns of sexualised attitudes towards women in dealership environments, noting that young women were sometimes viewed through a gendered lens rather than recognised for their professional capability and contributions. As she explained, new female recruits could be treated as “a new toy” rather than valued for their skills and potential.

Over time, concerns about the manager's conduct were escalated to the Dealer Principal. Recognising the impact on the female employees, they investigated the matter and ultimately terminated the manager's employment. For employees, this demonstrated that inappropriate behaviour would not be tolerated and that leadership was prepared to take decisive action. This example highlights the pivotal role Dealer Principals play in setting the standard for workplace culture. While policies and reporting mechanisms are important, stakeholders

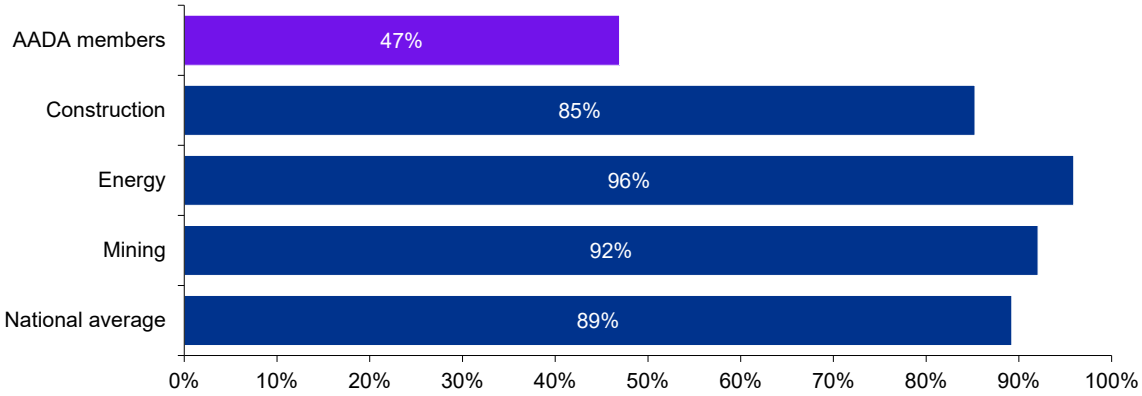
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consistently emphasised that workplace norms are ultimately set by the actions of dealer principals and senior leaders.

Workplace flexibility

A lack of workplace flexibility emerged as a key constraint to increasing female participation in the automotive dealer sector. WGEA data indicates that AADA members lag both the national average and several comparable industries in the adoption of formal flexible working policies. As shown in Figure 26, only 47 per cent of AADA members reported having a flexible working policy, compared with 89 per cent of employers nationally and between 85 and 92 per cent of employers across the construction, energy and mining sectors. While these industries have traditionally faced many of the same workforce challenges as automotive retail, they appear to have made greater progress in formalising flexible work arrangements as a strategy to attract and retain talent.

Figure 26: Share of employers with a flexible working policy or strategy, AADA members and comparator industries, 2024-25



Source: WGEA, Employer Census 2024-25

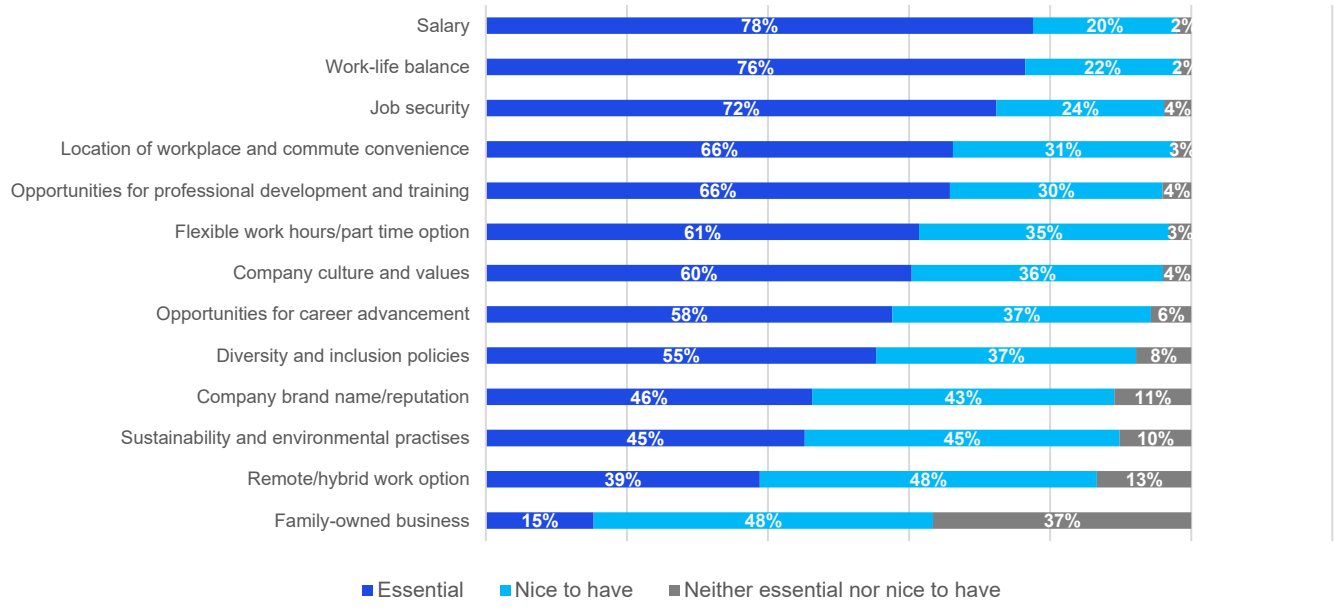
Note: AADA members refers to WGEA-reporting member organisations, representing approximately 20 per cent of the estimated AADA member workforce

Flexible and adaptable ways of working represent a significant opportunity to attract and retain more women in automotive retail. Stakeholders in the sector highlighted that long workdays, weekend requirements, and the lack of flexibility can be difficult to balance with caring responsibilities. This is particularly relevant given that women continue to shoulder a disproportionate share of unpaid care and domestic work in Australia, with women with children under 15 spending an average of 7 hours and 29 minutes per day on unpaid work, compared with 5 hours and 2 minutes for men.[43] While long and inflexible working hours have historically been viewed as a standard feature of dealership operations, sector leaders noted that they can discourage some women from entering the sector and contribute to women leaving at key life stages, particularly following the transition to parenthood. This challenge is reinforced by the survey findings, which show that work-life balance is one of the most important workplace factors for women considering a career in automotive retail. More than three quarters (76 per cent) rated work-life balance as essential in a prospective employer.

[43] Australian Bureau of Statistics (2025). How Australians use their time. Available at: https://www.abs.gov.au/statistics/people/people-and-communities/how-australians-use-their-time/latest-release

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Figure 27: Factors important when considering a new employer among those considering the automotive dealer sector



Q. Which of the following factors are essential or nice to have when considering a new employer? (Those who would consider automotive n= 225)

Source: AADA Survey Data (2026)

The relationship between workplace flexibility and women's workforce participation is well established in both Australian and international research. OECD analysis has identified family-friendly workplace policies, flexible work arrangements, childcare availability and parental leave provisions as important drivers of women's labour force participation and employment retention.[44] Similarly, WGEA highlights workplace flexibility as a key mechanism for expanding talent pools, improving employee retention, supporting career continuity following parental leave, and reducing barriers to workforce participation.[45] Leaders across the automotive sector described flexibility as one of the most practical and immediate levers available to dealerships seeking to expand their talent pool and improve retention. Importantly, they emphasised that flexibility does not necessarily require fundamental changes to dealership business models. Rather, it often involves relatively small adjustments to rostering practices, start and finish times, parental leave transitions, and workplace arrangements that better accommodate employees' personal and family commitments.

Stakeholders highlighted several examples of dealerships successfully implementing more flexible approaches without compromising customer service, productivity, or commercial outcomes. These included part-time arrangements, flexible start and finish times, nine-day fortnights, occasional weekends off, and creating family-friendly workplaces where employees could bring children to work when necessary. The COVID pandemic further challenged many longstanding assumptions about how dealership operations needed to be structured, demonstrating that greater flexibility could be introduced while maintaining business outcomes.

> ***"We opened [flexible hours] up to existing staff, both men and women. And [it was] life changing … as far as turnover of staff [was concerned]."*** *– Human Resources, Large Corporate Dealership (SA)*
>
> ***"We just pushed back our opening time from 8 to 8.30, which meant zero for our customers. It really wasn't a big deal. But it meant an awful lot to our staff, particularly our single mums in the sales department."*** *– Dealer Principal, Large Corporate Dealership (QLD)*

[44] OECD. (2013). *Drivers of Female Labour Force Participation in the OECD*. OECD Social, Employment and Migration Working Papers No. 145. Paris: Organisation for Economic Co-operation and Development. Available at: https://www.oecd.org/en/publications/drivers-of-female-labour-force-participation-in-the-oecd_5k46cvrgnms6-en.html

[45] Workplace Gender Equality Agency (WGEA). (2024). *Policy and strategy guidance: Flexible working arrangements*. Australian Government. Available at: https://www.wgea.gov.au/sites/default/files/documents/Policy-and-strategy-guidance-flexible-working-arrangements.pdf

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While working from home and hybrid working conditions are not feasible for sales, service, and technical roles, sector leaders expressed that hybrid arrangements may be suitable for some customer care and administrative functions. Overall, there was strong support for dealerships to pilot and test a range of flexible working models to broaden the pool of female talent available to the sector. Stakeholders noted that more flexible working arrangements can deliver benefits beyond attraction, including improved employee wellbeing, stronger retention, and greater long-term workforce sustainability.

Workplace policies

Workplace policies and practices were identified as an important factor influencing women's experiences in the automotive dealer sector, with stakeholders emphasising that their effectiveness depends on consistent implementation and leadership accountability. While many dealerships have formal policies and procedures in place, employee experiences were often shaped more by leadership behaviours, management capability, and workplace culture than by policy alone.

A notable theme was the difference between larger corporate dealership groups and small-to-medium sized businesses. Larger organisations were generally more likely to have dedicated HR functions, formal workplace conduct policies, structured reporting mechanisms, leadership development programs, and broader people and culture frameworks. Several HR leaders described how these capabilities had been progressively developed as their organisations grew, expanded through acquisitions, and sought greater consistency across multiple dealership locations.

> ***"[When I started] we had 700 staff and there was not a [single] HR manager. There were no policies or procedures in place ... There was no training in place..."*** *– Executive, Large Corporate Dealership (QLD)*

By contrast, small-to-medium sized dealerships were more likely to rely on direct relationships with owners and senior leaders, with workplace culture often shaped through personal leadership rather than formal HR structures. While this could create highly supportive environments, outcomes were also more dependent on individual management capability and commitment. Overall, stakeholders suggested that accessible HR support, leadership accountability and consistent implementation were critical. Whether delivered through a dedicated HR team or owned by business leaders, clear responsibility for people and culture was viewed as critical to creating inclusive workplaces and improving the attraction, retention, and progression of women in the automotive dealer sector.

Pay and recognition

Pay and remuneration were not widely identified as direct barriers to women's participation in the automotive dealer sector during consultations. Instead, stakeholders consistently pointed to broader workforce patterns that influence earnings outcomes, particularly the concentration of women in administrative and support functions and their underrepresentation in sales, finance and insurance (F&I), dealership management, and senior leadership roles, which are typically among the higher-remunerated positions within dealerships. As shown in Chart 21 and Chart 22, however, AADA members reported lower levels of formal pay equity practices than both the national average and several comparable industries.

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Figure 28: Share of employers with an equal remuneration policy

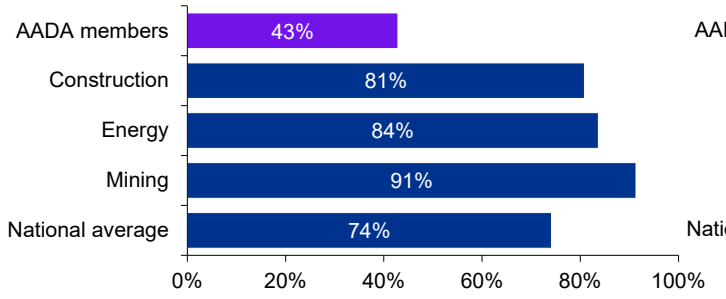
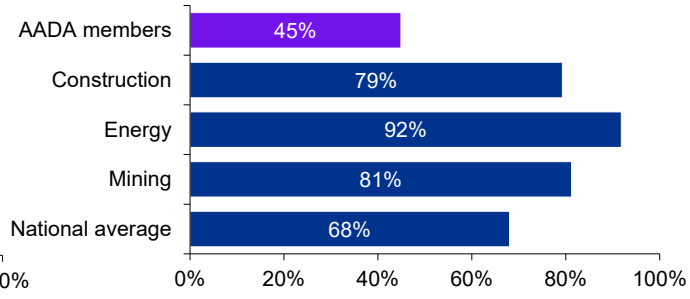


Figure 29: Share of employers who conducted gender pay gap analysis



Source: WGEA, Employer Census 2024-25

Note: AADA members refers to WGEA-reporting member organisations, representing approximately 20 per cent of the estimated AADA member workforce

Only 43 per cent of AADA members reported having an equal remuneration policy, compared with a national average of 74 per cent, while adoption was considerably higher in construction (81 per cent), energy (84 per cent), and mining (91 per cent). Similarly, only 45 per cent of AADA members reported conducting gender pay gap analysis, compared with 68 per cent nationally, and between 79 and 92 per cent across the construction, mining, and energy sectors.

These findings suggest that, while pay equity may not be perceived as a significant issue within many dealerships, there may be limited visibility of gender-based earnings differences across the sector. Without formal remuneration policies or regular pay gap analysis, dealerships may find it more difficult to identify whether disparities exist between comparable roles, monitor workforce trends over time, or understand how occupational segregation and career progression patterns contribute to differences in earnings outcomes.

Importantly, consultation findings indicate that stakeholders generally viewed gender differences in earnings as arising less from unequal pay for equivalent work and more from unequal representation across occupations and levels of seniority. Women were frequently reported to be concentrated in administrative, customer service and support functions, while men were more commonly represented in sales, management, and other revenue-generating roles with greater earning potential. Stakeholders also noted that women remain underrepresented in many senior leadership positions, further contributing to differences in overall earnings across the workforce. Participants highlighted that some dealership functions provide strong earning opportunities for women. Notably, aftercare and F&I roles were often identified as areas where women are well represented and highly successful. Several stakeholders described women excelling in customer-focused, relationship-driven positions and achieving strong financial outcomes in these roles. This suggests that women's earning potential within the sector is not inherently limited but rather influenced by the distribution of women across different career pathways and leadership positions.

Commission-based remuneration was also discussed during consultations. Stakeholders noted that many dealership roles rely heavily on performance-based incentives, particularly within sales functions. While these arrangements can create significant earning opportunities, some stakeholders suggested they may be more challenging for employees balancing caring responsibilities or seeking flexible work arrangements, particularly where success is linked to long working hours, weekend availability, or extensive customer contact. Although this issue was not raised as a widespread barrier, it highlights the interaction between remuneration structures, workplace flexibility, and workforce participation.

Taken together, the findings suggest that improving earnings outcomes for women is likely to depend less on addressing direct pay inequities and more on increasing female representation in higher-paying and leadership roles, expanding access to career progression opportunities, and improving visibility of workforce data. The relatively low uptake of equal remuneration policies and pay gap analysis among AADA members also points to an opportunity for dealerships to strengthen workforce monitoring and accountability. As more dealerships collect and analyse workforce data, sector leaders will be better positioned to understand where disparities exist, identify their drivers, and evaluate whether initiatives aimed at increasing female participation are translating into improved career and earnings outcomes.

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3.4 Career progression

Women in leadership

Stakeholders consistently identified the lack of visible female leaders as a key barrier to attracting and retaining women in the automotive dealer sector. Stakeholders in the sector have reflected that women remain significantly underrepresented in senior leadership and dealership principal roles, limiting the availability of role models for younger female employees. Stakeholders described the sector as making progress, but from a very low base, with advancement pathways for women often relying on exceptional individual effort rather than established career pipelines. Leadership in the sector suggested that increasing the visibility of women in leadership positions would help challenge perceptions that automotive careers are primarily for men and demonstrate that progression is achievable.

This view is supported by research on women in male-dominated industries, which shows that exposure to female role models and leaders can strengthen women's confidence, leadership aspirations, and motivation to pursue advancement opportunities.[46]

More broadly, stakeholders felt that the limited presence of women in leadership reinforces challenges across the employee lifecycle, influencing attraction, retention, career confidence, and perceptions of belonging within the sector. As a result, increasing the visibility of female leaders was viewed as an important step in building a more inclusive industry and encouraging more women to see automotive retail as a viable long-term career.

> ***"There's never been more than four female dealer principals at any conference."*** *– Dealer Principal, Large Corporate Dealership (QLD)*
>
> ***"I think bringing women into these leadership roles has certainly opened up opportunities for younger women coming through."*** *– Dealer Principal, Large Corporate Dealership (QLD)*

Career Progression

Women working in automotive retail reflected that career progression can be more challenging in traditionally male-dominated dealership environments, where credibility and leadership potential are not always assumed in the same way as they are for men. Many described feeling a greater need to continually demonstrate their capability, expertise, and commitment before being considered for advancement opportunities, recognition, or leadership roles. As a result, some women perceived that they must work harder than their male counterparts to achieve the same progression and professional recognition.

> ***"I think women tend to work harder because I feel like we think we've got something to prove when we probably don't."*** *– Dealer Principal, Large Corporate Dealership (QLD)*
>
> ***"I do feel like as a woman, you do need to work harder to show the same level of skill. You know, I think that you need to go above and beyond to put yourself in that position, to be getting that position, to be getting that job..."*** *– General manager, Large Corporate Dealership (NSW)*

These experiences are consistent with academic research, which found that women leaders in male-dominated industries often face ongoing pressure to prove their competence and credibility, with many reporting a need to continually re-establish their reputation when moving into new roles.[47] The research also found that women were often expected to outperform male colleagues in order to gain equivalent levels of respect and acceptance.[48] This

[46] Boerner, S., Schwarzmaier, M. and Tagos, I. (2025) 'Female motivation to lead: The impact of same-sex role models and female leadership strength awareness', *Frontiers in Psychology*, 16. Available at: Frontiers | Female motivation to lead: the impact of same-sex role models and female leadership strength awareness

[47] O'Brien, W., Hanlon, C. and Apostolopoulos, V. (2023) 'Women as leaders in male-dominated sectors: A bifocal analysis of gendered organizational practices', *Gender, Work & Organization*, 30(6), pp. 1867–1884. Available at: Women as leaders in male-dominated sectors: A bifocal analysis of gendered organizational practices - O'Brien - 2023 - Gender, Work & Organization - Wiley Online Library

[48] Ibid.

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perception is reflected in the survey findings, with only 35 per cent of women agreeing that the new car dealership sector offers great career pathways for women, while more than a quarter (26 per cent) disagreed. This suggests that concerns about progression opportunities may extend beyond the experiences of women already working in the sector and influence broader perceptions of automotive retail as a long-term career destination for women.

Figure 30: Perceptions of career pathways in the automotive dealer sector



Q. To what extent do you agree or disagree with the following statements about the new car dealership sector? (Total sample n=754) NET: Disagree = Strongly disagree + Somewhat disagree NET: Agree = Strongly agree + Somewhat agree

Source: AADA Survey Data (2026)

Stakeholders noted that these barriers are often reinforced through everyday workplace experiences with colleagues and customers. Many women reported feeling a greater need to prove their competence before being taken seriously, while assumptions about women's automotive knowledge or technical capability remained common. Over time, these experiences can undermine confidence, create frustration, and make career progression feel less attainable. Addressing these perceptions and experiences will be critical to ensuring women can see clear, achievable career pathways within automotive retail and are supported to progress into leadership positions over the long term.

Development and mentorship

Mentorship, sponsorship and career development were consistently identified as important enablers of women's career progression in the automotive dealer sector. Many participants attributed their advancement to supportive leaders who recognised their potential, encouraged them to pursue stretch opportunities and actively advocated for their progression. Beyond formal mentoring relationships, stakeholders emphasised the importance of sponsorship, where Dealer Principals, managers and senior leaders create visibility, open doors to new opportunities and support women to move into leadership roles.

Women who had progressed into senior positions often described having influential champions who challenged them to step outside their comfort zone and provided guidance at key career transition points. This is consistent with research on women in male-dominated industries, which has found that mentoring and support from managers or champions can play a critical role in helping women navigate career pathways, access opportunities, and progress into leadership positions.[49] Women in the sector also highlighted the importance of structured leadership development and mentoring programs in building confidence, capability and career aspirations. Several stakeholders noted that increasing access to mentors, sponsors and visible female role models could help create clearer career pathways, strengthen retention and improve the representation of women in senior operational and leadership roles across the sector.

> ***"Having someone like leadership standing beside and endorsing women in the industry. I think that's what it takes because it's that peer modelling."*** *– Human Resources, Large Corporate Dealership (WA)*
>
> ***"We created the Women's Leadership Program. We made everyone be part of this program, whether you're male or female. We provided role models, female role models in the business so people could come in and aspire to be, you know, like-minded people like them they could aspire to work towards."*** *– Human Resources, Large Corporate Dealership (SA)*

[49] Ibid.

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04

Performance

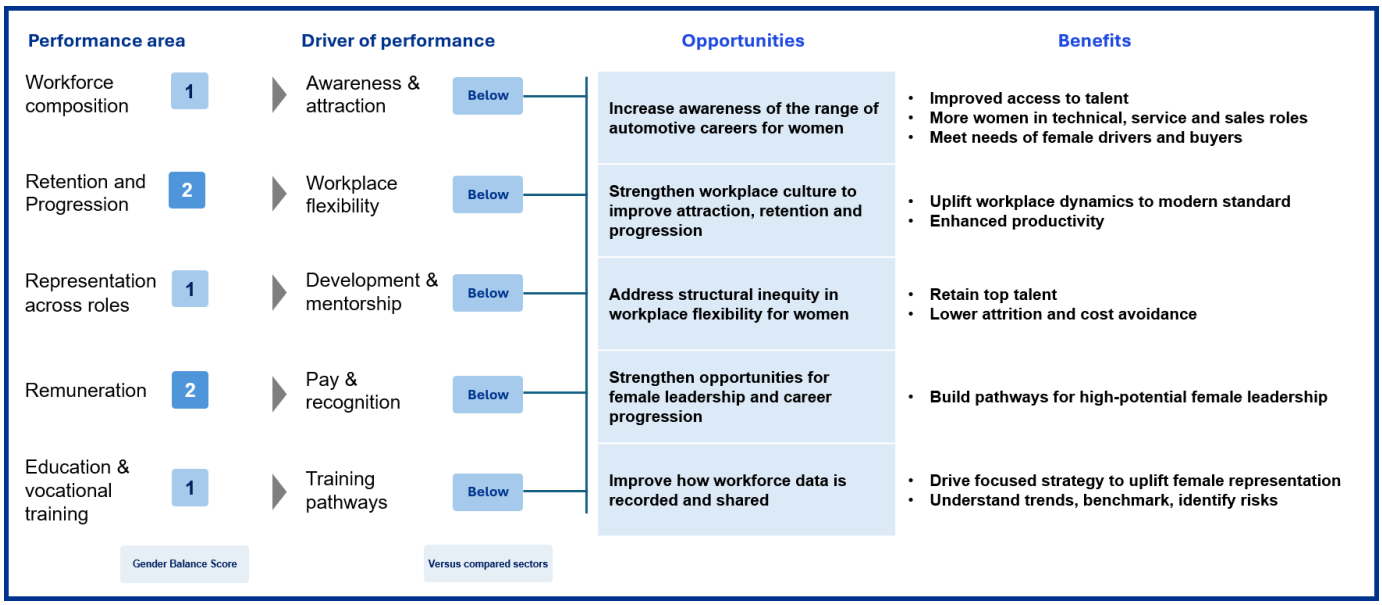
Drivers

Opportunities

4 Opportunities for improvement and potential benefits

This section outlines the key opportunities available to increase female participation in the automotive retail industry. Drawing on stakeholder consultations, it identifies four interconnected areas for action: increasing awareness and consideration of automotive careers among women, strengthening workplace culture, improving workplace flexibility, and expanding opportunities for leadership and career progression. For each opportunity, the section highlights practical actions that can be undertaken by small-to-medium sized dealerships, corporate dealership groups, industry bodies and policymakers, alongside the potential workforce and business benefits associated with these initiatives. Together, these opportunities provide a roadmap for improving attraction, retention and progression outcomes for women across the industry.

Figure 31: Australian automotive dealer sector industry performance, drivers and opportunities summary



Refer to Table 9 in Appendix A for details on the Gender Balance Scorecard assessment.

Improving female participation in the automotive retail industry is a challenge that will require coordinated action across multiple parts of the sector. The barriers identified through this report are interconnected and influence different stages of the employee lifecycle. For example, increasing awareness of automotive careers may encourage more women to consider the industry, but attracting and retaining talent also depends on workplace culture, access to flexibility, career development opportunities, and visible pathways into leadership.

As a result, meaningful change is unlikely to occur through a single initiative, a narrow focus on representation targets, or within a short timeframe. While increasing the number of women working in the industry is an important outcome, sustainable progress ultimately depends on creating workplace environments where women feel welcomed, valued, supported and able to succeed. Many of the challenges identified reflect longstanding perceptions of the industry, established workplace practices, and broader social and workforce trends that have developed over many years. Addressing these issues requires more than improving workforce metrics alone; it requires a cultural shift that makes automotive retail a more attractive and inclusive career destination for women. Progress is therefore likely to be gradual and cumulative, requiring sustained commitment from dealership leaders, industry bodies, education providers and policymakers.

Importantly, the opportunities presented in this section should not be viewed as standalone initiatives. Rather, they are mutually reinforcing areas of action. Improvements in one area, such as workplace culture, can strengthen outcomes in others, including attraction, retention and career progression. Similarly, increased visibility of women in leadership can help challenge stereotypes, demonstrate that success is achievable within the industry, and improve awareness of automotive careers among future employees. The overall objective is not simply to increase

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female participation for its own sake, but to foster workplaces and career pathways that enable a broader and more diverse talent pool to thrive. While individual dealerships will differ in their needs, resources and operating environments, the opportunities outlined in this section represent practical areas where targeted action can contribute to a more inclusive, sustainable and resilient automotive workforce over time.

4.1 Opportunities to improve diversity performance

Increase awareness of automotive careers for women

A key opportunity to increase female participation in the automotive industry is addressing the low awareness and consideration of the sector as a career pathway. Women working in the industry consistently reported limited visibility of automotive careers prior to entering the workforce, with many unaware of the breadth of roles available within dealerships, the strong earning potential on offer, and the diverse career pathways available beyond traditional perceptions of mechanics and vehicle sales. This is demonstrated in the following case study.

Case study: Discovering an automotive career by chance

One woman described entering the automotive industry by accident. She joined a dealership as a receptionist with little understanding of the sector. Reflecting on her entry to the industry in that first role, she explained that it was "more probably just a coincidence than it was automotive." What began as an entry-level reception role evolved into a career in finance, operations and business leadership. Over time, she progressed into accounting positions, became a Financial Controller, completed further qualifications, and ultimately moved into a General Manager role.

A key factor in her progression was discovering the scale and complexity of dealership operations. As she recalled, she was "immediately taken by how complex it was" and "how much actually went into running a dealership." Rather than being drawn by a passion for cars, she was attracted to the pace, variety and business challenges the industry offered.

Her story highlights the breadth of opportunities available within automotive retail, extending well beyond vehicle sales and technical trades. More broadly, it reflects a key theme emerging from the research: many women have limited awareness of the diverse career pathways available within dealership businesses. Increasing visibility of opportunities within dealerships could help attract more women to the industry and demonstrate that dealerships can offer rewarding long-term careers that are often overlooked.

Actions to increase awareness of automotive careers for women are outlined in Table 1.

Table 1: Actions to increase awareness of automotive careers for women

Group	Actions
Actions for small-to-medium sized dealerships	• Partner with local schools, TAFE's and community organisations to promote automotive careers to women and girls • Offer work experience placements and dealership visits for students • Highlight female employees and leaders in recruitment materials and local marketing • Encourage female staff to participate in community and career events
Actions for corporate dealerships	• Develop structured school engagement, cadetship and internship programs. • Increase visibility of female leaders through internal and external communications. • Promote diverse career pathways across dealership operations, leadership, technical and support functions. • Include gender diversity objectives within attraction and recruitment strategies.

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Group	Actions
Actions for industry and policymakers	• Lead industry-wide awareness campaigns promoting automotive careers for women. • Develop resources for schools, career advisers and parents. • Showcase successful women across leadership, technical, sales and operational roles. • Challenge industry stereotypes by promoting contemporary dealership careers and career pathways.

Strengthen workplace culture to improve attraction, retention and progression

Workplace culture was consistently identified as one of the most significant barriers to attracting and retaining women in the automotive industry. While many organisations have made progress, participants described enduring perceptions of "boys' club" environments, alongside experiences of bullying, harassment and behaviours that discourage women from remaining in the industry. This is highlighted in the following case study.

Case study: The Power of Leadership in Driving Cultural Change

One female leader reflected on entering the automotive industry at a time when inappropriate comments, jokes and discussions about women were far more common and often went unchallenged. As she noted, **"women used to be the butt of jokes in automotive."**

While she acknowledged that these behaviours have not disappeared entirely, she described a significant cultural shift driven by stronger leadership and accountability. Leaders are increasingly promoting women into senior roles, speaking positively about their contributions, and setting clearer expectations around respectful workplace conduct. Importantly, she observed that organisations are now taking meaningful action when standards are breached, including terminating employees for serious misconduct. In her view, visible leadership action sends a powerful message about what behaviour is and is not acceptable.

This experience highlights that workplace culture can change. While historical norms may have discouraged women from entering or progressing within the industry, strong leadership, clear accountability and a commitment to inclusion are helping create workplaces where women feel more respected, supported and able to succeed.

> **"They've definitely put their money where their mouth is in terms of 'We're not going to accept this behaviour and we're going to show that we're not going to accept that behaviour'."**

Actions to strengthen workplace culture to improve attraction, retention and progression for women are outlined in Table 2.

Table 2: Actions to strengthen workplace culture to improve attraction, retention and progression for women

Group	Actions
Actions for small-to-medium sized dealerships	• Dealer principals visibly champion respectful and inclusive behaviours. • Establish clear expectations regarding workplace conduct. • Address inappropriate behaviour consistently and promptly. • Recognise and celebrate women's achievements within the business. • Provide employees with trusted pathways to raise concerns.
Actions for corporate dealerships	• Embed diversity and inclusion metrics into leadership accountability frameworks. • Implement regular training on respectful workplaces, unconscious bias and inclusive leadership. • Establish formal HR and reporting processes.

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Group	Actions
	• Monitor gender differences in promotion, performance and turnover. • Support employee networks, mentoring and sponsorship programs.
Actions for industry and policymakers	• Develop industry guidance and resources on inclusive workplace practices. • Share case studies and examples of dealerships successfully improving culture. • Facilitate forums for dealerships to exchange good practice. • Promote industry standards regarding workplace behaviour and inclusion.

Increase workplace flexibility

Flexible and adaptable ways of working represent a significant opportunity to attract and retain more women in automotive retail. Long working hours, weekend work and inflexible rostering were frequently identified as barriers, particularly for employees with caring responsibilities. Many organisations in the sector are already piloting flexible working arrangements and realising benefits as outlined in the following case studies.

	Dealership Case Studies: Piloting Flexible Working
1	Rigid working hours historically creating barriers for employees with caring responsibilities, particularly women. The business shifted away from fixed start times and introduced flexible arrangements tailored to individual needs. For example, employees were no longer required to start at a set time. **"If you need to drop your son to school… start at 9, that's not a problem… you need to leave early, you leave early"** Additional flexibility included staggered hours and allowing time off for caring duties or family commitments. The business also introduced allowing sales staff to take weekends off periodically. **"We let them have a Saturday off a month so they could watch their kids play sport".** The impact was immediate and material, with the interviewee describing the changes as **"life changing… as far as turnover of staff".** This case shows that relatively simple adjustments to working patterns can significantly improve retention, particularly for employees with caring responsibilities.
2	Flexibility was applied to support women returning from parental leave, addressing a key point where many women exit the industry. A female employee returning from maternity leave was placed on a flexible work agreement to ease her transition back to work: **"We put her on a flexible work agreement… to ease her back into the industry… and kept her on that as long as she needed".** This allowed her to gradually increase hours and rebuild capacity without the pressure of immediately returning to full-time work. The leader of this dealership acknowledged that implementing flexibility in customer facing roles is challenging, noting **"it is absolutely a challenge… we run our businesses thin"**, but still prioritised retention over rigid structures. The key outcome was the ability to retain skilled female talent who would otherwise likely exit the workforce at a critical life stage. This highlights that even in operationally constrained environments, targeted flexibility can be effective when applied at key transition points.

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3	Flexibility was introduced through informal hybrid working arrangements to support women balancing work and family responsibilities. Rather than requiring full-time on-site presence, some employees were able to split their time between the dealership and home. As described by one employee, **"She does two days at work and one day at home… another does two or three days at work and one day at home"** These arrangements were applied across roles where elements of work could be completed remotely, particularly tasks that could be managed via email and systems rather than face to face customer interaction. This flexibility allowed women to remain engaged in the workforce while managing caring responsibilities, particularly after returning from parental leave. It also provided continuity for the business, enabling experienced employees to stay rather than exit due to rigid full-time requirements. While not formalised across all roles, the case demonstrates that hybrid working can be effectively implemented in parts of dealership operations. It highlights that even partial flexibility, rather than full-time remote work, can materially improve retention outcomes. More broadly, this approach shows that targeted flexibility, applied to the right roles and life stages, can help overcome one of the key structural barriers limiting women's participation in the automotive industry.

Actions to increase workplace flexibility are outlined in Table 3.

Table 3: Actions to increase workplace flexibility

Group	Actions
Actions for small-to-medium sized dealerships	• Trial flexible start and finish times. • Introduce period weekends off for customer-facing employees. • Explore part-time and job-share arrangements. • Support employees returning from parental leave through tailored transition arrangements. • Create family-friendly workplace practices where appropriate.
Actions for corporate dealerships	• Pilot and evaluate new rostering and flexible work models across dealership networks. • Introduce formal flexible work policies. • Establish consistent approaches to parental leave transitions. • Identify roles suitable for hybrid work arrangements. • Measure retention and engagement outcomes associated with flexibility initiatives.
Actions for industry and policymakers	• Share successful dealership case studies and flexible work models. • Develop practical guidance on implementing flexibility in customer-facing environments. • Promote evidence demonstrating the business benefits of flexibility. • Facilitate industry discussions on workforce sustainability and retention.

Strengthen opportunities for female leadership and career progression

Women remain underrepresented in many leadership and operational management roles despite strong representation in some support functions. Increasing female leadership representation presents an opportunity to strengthen talent pipelines, improve retention and create more visible role models within the industry.

Actions to strengthen opportunities for female leadership and career progression are outlined in Table 4.

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Table 4: Actions to strengthen opportunities for female leadership and career progression

Group	Actions
Actions for small-to-medium sized dealerships	• Identify and support high-potential female employees. • Provide mentoring and development opportunities. • Increase visibility of female leaders within the business.
Actions for corporate dealerships	• Introduce structured leadership development programs. • Establish sponsorship and mentoring programs. • Incorporate diverse talent into succession planning. • Monitor leadership pipeline indicators and promotion rates by gender.
Actions for industry and policymakers	• Develop leadership development opportunities for women across the industry. • Facilitate peer networks and mentoring opportunities. • Showcase successful female leaders and their career pathways. • Support leadership capability development across dealerships.

Improve how workforce data is captured, stored and shared

There is inconsistent collection of workforce gender data across the sector, particularly in relation to workforce composition, role levels, remuneration and retention. This can make it challenging for dealerships to establish a baseline, identify potential barriers to women's progression, and assess whether initiatives to improve female participation are delivering measurable outcomes. In many dealerships, gender diversity competes with other operational priorities, which can limit the focus placed on collecting and analysing workforce gender data.

Reporting requirements also differ across the industry. Larger dealer groups that meet the 100-employee threshold report to the WGEA, but many groups operate across multiple business entities, and entity-level reporting can mask underrepresentation at the dealership level or leave smaller entities below the threshold. Most individual dealerships sit below the threshold and are not required to report at all, and in many cases workforce data is not captured in any form. Improving data capture would give businesses a clear baseline to measure change over time and give the industry the visibility needed to identify trends and target support.

Actions to improve workforce data capture and reporting are outlined in Table 5:

Table 5: Actions to improve how workforce data is captured, stored and shared

Group	Actions
Actions for small-to-medium sized dealerships	• Establish a simple, consistent way to capture and store workforce data, including gender representation across roles, seniority, pay and retention. • Record workforce data in the same format each year to establish a baseline and track change over time.
Actions for corporate dealerships	• Capture and monitor workforce data at the individual dealership level, not only at the group or entity level, to identify where women are underrepresented across the business. • Continue to report to WGEA where the reporting threshold is met and use the results to inform workforce planning rather than for compliance alone.
Actions for industry and policymakers	• AADA to coordinate a regular collection of workforce data from members, for example through a periodic survey every twelve months, to monitor female participation across the industry and identify trends. • Design any industry collection to keep member data confidential and report results in a way that supports benchmarking without identifying individual dealerships.

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4.2 Benefits of improving gender equity performance

The potential benefits of improving gender diversity in the Australian automotive dealer sector are summarised in Table 6.

Table 6: Benefits of improving gender equity performance

Actions to improve gender performance	Benefits for the sector
Increase awareness of the range of automotive careers for women	• Larger and more diverse recruitment pipelines across sales, service, technical and leadership roles. • Improved ability for dealerships to address workforce shortages. • Greater female representation across all areas of dealership operations. • Enhanced industry reputation as an inclusive and progressive employment sector. • Improved long-term workforce sustainability through access to a broader talent pool.
Strengthen workplace culture to improve attraction, retention and progression	• Improved attraction and retention of female employees. • Reduced staff turnover and associated recruitment and onboarding costs. • Higher levels of employee engagement, wellbeing and job satisfaction. • Safer and more respectful workplace environments. • Increased employee confidence in leadership and organisational processes. • Stronger employer brand and reputation among prospective employees. • Greater diversity of perspectives and ideas contributing to business performance.
Address structural inequity in workplace flexibility for women	• Greater workforce participation by women, particularly those with caring responsibilities. • Improved retention of skilled employees during key life stages such as parenthood. • Reduced turnover and loss of organisational knowledge. • Increased employee wellbeing and work-life balance. • Improved employee engagement and productivity. • Enhanced ability to attract candidates who may not otherwise consider dealership careers. • Stronger workforce sustainability in a competitive labour market.
Strengthen opportunities for female leadership and career progression	• Increased representation of women in leadership and decision-making roles. • Stronger internal talent pipelines and succession planning outcomes. • Improved retention of high-performing female employees. • Greater visibility of role models for current and prospective employees. • Increased employee confidence in career development opportunities. • More diverse leadership teams with broader perspectives and experiences. • Enhanced organisational performance through improved leadership capability

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Actions to improve gender performance	Benefits for the sector
Improve how workforce data is captured, stored and shared	• A clear baseline of gender representation across roles, seniority, pay and retention, against which progress can be measured. • Better visibility of where women are underrepresented and where they exit the business. • The ability to measure whether initiatives to improve female participation are working, supporting better targeting of effort and investment. • An industry-wide view of female participation that AADA can use to identify trends, benchmark performance and target support. • Improved workforce planning and earlier identification of retention risks. • Greater transparency and accountability on gender diversity across the sector.

Improving gender equity in the automotive dealer sector will require coordinated action across the employee lifecycle, from attracting more women into the industry through to supporting their progression into leadership roles. Global evidence shows that organisations with greater gender diversity in leadership consistently outperform their peers financially. Companies in the top quartile for executive gender diversity are 39 per cent more likely to outperform financially than organisations in the lowest quartile for gender diversity.[50] Given AADA recently reported an annualised $91.3 billion of sales,[51] a modest improvement in financial performance associated with greater gender diversity could deliver a substantial commercial return. An uplift of only 0.25% to 0.50% would equate to approximately $228 million to $457 million in additional annual revenue across the sector.

Importantly, the opportunity extends beyond improving workforce diversity. By attracting and retaining more women, dealerships can better reflect the customers they serve, expand access to a broader talent pool in a constrained labour market, strengthen workforce capability through more diverse perspectives and experiences, and enhance organisational performance over the long term. The AADA members represent approximately 64,045 employees as of March 2026,[52] including approximately 14,500 women (22.7 per cent).[53] Among them, women leave at a rate around 9 per cent higher than men[54]. If attrition of women were reduced to the same rate as men, the industry could retain approximately 1,250 additional women each year. With an average automotive dealer salary of $106,000, and replacement costs typically estimated at fifty to seventy-five per cent of annual salary (equivalent to six to nine months' pay), the annual cost of this excess female attrition is estimated to be between $67 million to $100 million. [55,56]

The findings of this report suggest that four priority areas offer the greatest opportunity for change: increasing awareness of automotive careers, strengthening workplace culture, improving workplace flexibility, and creating clearer pathways to leadership and career progression. While no single initiative will address the challenges identified, together these actions can help expand access to talent, improve retention, strengthen leadership pipelines and create more inclusive workplaces. As workforce shortages, changing customer expectations and industry transformation continue to reshape the sector, organisations that successfully harness the full potential of Australia's talent pool will be better positioned to drive productivity, competitiveness and sustainable growth. Gender equity should therefore be viewed not only as a workforce objective, but as a strategic opportunity to strengthen the future performance and resilience of the Australian automotive dealer sector.

[50] McKinsey and Company. (2023). *Diversity matters even more: The case for holistic impact.* Available at: https://www.mckinsey.com/featured-insights/diversity-and-inclusion/diversity-matters-even-more-the-case-for-holistic-impact
[51] Australian Automotive Dealer Association (2026). *Dealernomics 2026.* Available at: https://www.aada.asn.au/dealernomics-2026/
[52] Ibid.
[53] Based on KPMG analysis of WGEA data for AADA members.
[54] Based on KPMG analysis of WGEA data for AADA members.
[55] The cost of replacing an employee includes recruitment, onboarding, training expenses and productivity losses.
[56] Society of Human Resource Management. (2026). *Measuring the Return on Developing your Leaders.* Available at: Measure the Return on Developing Leaders

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Table 7: Summary of performance, drivers, opportunities and benefits

Current sector performance	Performance drivers	Improvement opportunities	Dealer and sector benefits
Workforce participation (Low) Women represent 23% of the auto-motive dealership workforce. Less than half the national workforce average (51%)	**Awareness and attraction (Low)** Low awareness of career options and the reputation of automotive sector limit women entering the workforce. Only 23% of women currently in a customer facing role would consider working in automotive retail sector.	• Partner with local schools and TAFEs to offer work experience and traineeships • Highlight female employees and leaders in recruitment materials • Lead industry-wide awareness campaigns promoting automotive careers for women. • Develop resources for schools, career advisers and parents.	**Improved access to talent** • Expanded access to workforce capacity at a time with skills shortages and high competition for labour. • Strengthened recruitment pipelines across technical, customer-facing and leadership roles. • Meet needs of female drivers and buyers
Retention and progression (Med) Women represent 29% of exits despite representing only 23% of employees, indicating they are leaving the industry at higher rates than they are entering	**Workplace flexibility (Low)** Fewer than half of AADA members have a flexible workplace policy, compared to a national average of 89% and more than 85% of businesses in construction and mining. 66% of mid-career women surveyed said paid parental leave is essential at a new employer.	• Dealer principals as champions of respectful and inclusive behaviours. • Experiment with flexible role design. • Embed diversity and inclusion metrics into leadership accountability frameworks. • Develop industry guidance on sustainable flexibility and inclusive workplace practices.	**Stronger financial performance** • Evidence indicates businesses with higher gender diversity perform better financially. • Stronger retention reduces workforce costs associated with turnover, vacancies and recruitment.
Representation across roles (Low) Women hold only 14-15% of management positions, which is significantly below the national average and below other male dominated sectors such as energy, mining and construction	**Development and mentorship (Low)** Only 1 in 3 women perceive automotive retail offers great career pathways for them. 1 in 4 (26%) actively disagreed that great careers were available to women in the sector.	• Identify and support high-potential female employees. • Provide mentoring and leadership development opportunities. • Develop leadership development opportunities for women across the industry	**Enhanced leadership, workforce dynamics and retention** • Gender diversity brings a broader range of perspectives and approaches to leadership • Gender diversity fosters a modern workplace dynamic. • Women in leadership supports retention of women in the business and sector
Remuneration (Med) The sectors gender pay gap is between 13-15%, with women underrepresented in high-paying leadership roles and dominating lower paid positions such as clerical and administrative workers	**Pay and recognition (Low)** Fewer than 1 in 2 AADA members have an equal remuneration policy compared to the national average of 74% of employers. Sentiment of women in the sector is lower pay is due to the concentration of women in administrative roles.	• Consider structured incentives for skills progression, including partnering with OEM. • Develop equal remuneration policy. • Explore industry approach to equal remuneration policy.	**Supports retention of trainees and high performing talent** • Avoidance of replacement costs
Education and vocational trends (Low) Women comprise only 14% of automotive apprentices, highlighting challenges in building the sectors future talent pipeline	**Training pathways (Low)** Low female participation in trade and vocational pathways constrain the number of women entering service management and operational roles, despite strong consideration of training to advance their career.	• Partnering with schools and TAFEs • Consider structured incentives for skills progression, including partnering with OEM.	**Build talent pipeline for automotive dealership sector** • Establish the sector as an attractive career pathway for in-demand trades.

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Appendices

Appendix A: Research methodology

The AADA commissioned KPMG to undertake an economic analysis of gender equity within the Australian automotive dealer sector. The purpose of the study is to assess current workforce outcomes, understand the drivers of gender representation and remuneration patterns, and identify opportunities to improve participation, retention and progression of women across the industry.

A mixed-methods research approach was adopted to provide robust, quantitative evidence of workforce outcomes and qualitative insights into the factors influencing those outcomes. The methodology combined:

- Analysis of workforce composition, remuneration and vocational education datasets
- Literature review and comparison with other industries
- Industry stakeholder consultations across the automotive dealer sector
- A survey of potential female workforce entrants to the sector
- Economic analysis of workforce trends and opportunities.

The combination of these methods enabled triangulation of findings and supported the development of evidence-based conclusions regarding gender equity within the sector.

Research Framework

The study was structured around four key research questions:

01 | How is the automotive dealer sector currently performing?

- Workforce composition
- Gender representation
- Leadership participation
- Remuneration outcomes
- Education and training pathways

02 | How does the sector compare with other industries?

- Industry benchmarks
- Leading practices
- Workforce participation trends

03 | What factors are driving current outcomes?

- Awareness and attraction
- Recruitment and entry pathways
- Workplace experience
- Career progression and leadership opportunities

04 | What opportunities exist to improve gender equity and workforce outcomes?

- Short-term actions
- Longer-term structural reforms
- Potential business and workforce benefits

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Analysis of workforce composition, remuneration and vocational education

Quantitative analysis was undertaken to establish an evidence-based assessment of workforce performance outcomes across the automotive dealer sector. The analysis draws on three main datasets. WGEA data covered workforce composition, movements and pay for larger dealership groups. ABS data set the sector against the whole automotive retail industry and the wider labour market. NCVER data covered the vocational training pipeline that feeds the sector's technical roles. Together the three sources place detailed employer data against the size and shape of the industry.

The analysis drew on multiple data sources, including:

- Workplace Gender Equality Agency (WGEA)
- Australian Bureau of Statistics (ABS)
- National Centre for Vocational Education Research (NCVER).

Workplace Gender Equality Agency (WGEA)

WGEA data was used to analyse:

- Workforce composition
- Gender representation by occupational category
- Manager and leadership representation
- Recruitment and promotion outcomes
- Separation rates
- Parental leave trends
- Gender pay gaps
- Pay quartile distribution.

WGEA data provided the primary source for analysing workforce dynamics among larger dealership organisations and enabled benchmarking against other Australian industries. All WGEA figures in this report come from the WGEA employer census for 2024 to 2025 (*WGEA, Data Explorer and public employer datasets, 2024 to 2025*). WGEA reporting is a legal obligation for non-public-sector employers with 100 or more employees (*Workplace Gender Equality Act 2012*). The dataset is therefore a near-complete record of larger private-sector employers, not a survey sample. It records data by reporting employer, identified by Australian Business Number (ABN), not by parent corporate group.

The analysis used two populations within the WGEA data as described in Table 7.

Table 8: Populations used in quantitative analysis

Population	What it is	Purpose
AADA member cohort	The WGEA reporting entities confirmed as belonging to AADA members, matched by ABN and combined into one population.	Describes the workforce of AADA's own members. This is the cohort the report speaks to directly.
Car Retailing (ANZSIC class 3911)	All WGEA-reporting employers classified to Car Retailing, covering 123 reporting employers and 35,805 employees.	Provides a stable, sector-wide benchmark. It includes non-member and used-car retailers, so it describes the sector rather than the membership.

Building the AADA member cohort involved three steps. First, members confirmed the full set of subsidiary ABNs under which they report to WGEA. Second, AADA confirmed the member list and the reporting entities representing each member. Third, a digits-only match linked each confirmed ABN to the census, so formatting differences did not block a match. The matched entities then formed one member population.

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The ABN match matters as group structures are fragmented in the data. A single listed group may report through many separate entities. The public-facing ABN is often not one of those in the dataset. A match on group name, or on a single ABN, would understate member representation. The subsidiary-level confirmation step avoids this.

Note on gender pay gap measurement

The gender pay gap reported for each employer is the average total remuneration gender pay gap. It is calculated as the difference between average total remuneration for men and women, expressed as a percentage of average male total remuneration, consistent with WGEA published methodology. Total remuneration includes base salary, superannuation, bonuses, overtime and allowances. Part-time and casual salaries are annualised to full-time equivalents before averages are calculated.

Figures for the AADA member cohort and comparator groups are the mid-point of employer-level gaps: the point at which half of employers in the group have a larger gap and half a smaller one. The mid-point is not skewed by extreme results at individual employers and matches the presentation WGEA uses for industry-level results.

The gender pay gap reflects differences in earnings across all roles, levels and working patterns. It is not a measure of unequal pay for equivalent work.

Australian Bureau of Statistics (ABS)

ABS datasets were used to examine:

- Industry employment levels
- Workforce demographics
- Labour market participation
- Occupation profiles
- Industry economic contribution
- Comparisons with other sectors.

ABS data provided broader labour market context and supported analysis of the automotive retail industry's position relative to the wider Australian workforce. Industry employment and the gender split come from ABS Labour Force data, at the Motor Vehicle Retailing level (ANZSIC group 391) (ABS, Labour Force, Australia, Detailed, data cube EQ06, Employed persons by industry group and sex).

The two main sources sit at different levels of the classification, which matters for how they are compared. The WGEA benchmark uses Car Retailing (ANZSIC class 3911), a four-digit class, while the ABS figures use Motor Vehicle Retailing (ANZSIC group 391), a three-digit group that also includes motorcycle and other motor vehicle retailing. The two describe related but not identical populations. The report uses each at its own level, WGEA at class level for detailed employer analysis and ABS at group level for whole-of-industry context and compares them at a high level rather than as direct equivalents.

National Centre for Vocational Education Research (NCVER)

NCVER apprenticeship and training data was analysed to assess:

- Apprenticeship commencements
- Completion rates
- Attrition rates
- Gender participation in vocational pathways
- Comparisons with other trade-based industries.

This analysis enabled examination of workforce pipeline challenges and the role vocational pathways play in shaping future workforce composition.

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Comparator Industry Analysis

Given the automotive dealer sector shares characteristics with other male-dominated industries, selected comparator industries were examined to identify transferable insights and emerging practices.

Comparator industries included:

- Construction
- Mining
- Energy and utilities.

These sectors were selected due to similarities in:

- Workforce gender composition
- Reliance on vocational pathways
- Technical and trade-based occupations
- Skills shortages
- Workforce attraction challenges.

The analysis considered workforce participation trends, apprenticeship outcomes and examples of initiatives designed to improve female participation and retention.

Literature review

Literature Review

A targeted literature review was undertaken to identify:

- Evidence on the relationship between gender diversity and business performance
- Australian and international workforce trends
- Existing research on automotive workforce participation
- Barriers affecting women in male-dominated industries
- Leading practices and successful interventions from comparable sectors.

The review incorporated research from government agencies, industry bodies, academic studies and major economic and workforce reports. Findings from the literature were used to contextualise industry data and identify potential opportunities for action.

Consultations Industry consultation

Stakeholder Consultations

Consultations were undertaken with a range of stakeholders across the automotive dealer sector, with coverage every state and territory (except for ACT), including metro areas and regional locations. Specific roles included:

- Owner, Chief Executive Officer
- Chief Operating Officer, Chief People Officer
- Dealer principals, general managers and department heads (e.g. financial controller, service manager, human resource manager)
- Female employees working within the sector (e.g. after-sales, customer service, reception, vehicle sales, vehicle servicing)

The consultations explored perceptions and experiences regarding:

- Attraction to the industry
- Recruitment practices
- Workplace culture

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- Retention challenges
- Career progression
- Leadership pathways
- Flexible work arrangements
- Opportunities for improvement.

Qualitative findings were used to provide context to quantitative workforce outcomes and identify potential drivers of observed trends. Further details on the consultation approach are outlined in Appendix B.

Industry Perception Survey

A survey was designed to understand perceptions of the automotive dealer sector among women who could potentially enter the industry.

The survey included approximately 750 working-age Australian women (18 to 64 years) who met screening criteria designed to identify respondents with skills or experience potentially transferable to automotive retail roles. Women already employed within the automotive industry were excluded from participation.

The survey examined:

- Awareness of automotive careers
- Industry perceptions
- Employment preferences
- Career decision drivers
- Barriers to considering automotive careers
- Attractiveness of alternative industries
- Potential motivators to enter the sector

To improve representativeness, survey responses were weighted based on age and state distributions and adjusted using screener incidence rates among working-age Australian women. Further details on the survey approach are outlined in Appendix C.

Synthesis and Analysis

Findings from all research streams were synthesised to identify:

- Key workforce outcomes
- Common themes across quantitative and qualitative evidence
- Structural and cultural drivers of current performance
- Areas of alignment and divergence across data sources
- Opportunities for improvement.

This approach enabled conclusions to be supported by multiple sources of evidence and ensured that recommendations reflected both workforce data and stakeholder experience.

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Gender Balance Scorecard

A gender balance scorecard provides a practical and consistent framework for assessing workforce outcomes across the key dimensions of gender equality: participation, retention, leadership representation, gender pay equity and talent pipelines. By translating underlying metrics into a common five-point scale, the scorecard enables organisations to quickly identify areas of strength and areas requiring attention, while supporting comparisons over time. Scores range from 1 (significant gender imbalance) to 5 (gender-balanced or leading-practice outcomes), with higher scores reflecting stronger outcomes for women's representation, progression and inclusion. For the automotive dealer sector, the scorecard can be used to establish a baseline, monitor progress, evaluate the impact of initiatives, and track whether outcomes for women are improving, stagnating or declining over time. The thresholds below show how the underlying metrics translate into scorecard scores.

Table 9: Translation of underlying metrics into Gender Balance Scorecard scores

Measure	Score 1	Score 2	Score 3	Score 4	Score 5
Participation (% women in workforce)	<30% women	30% to <40%	40% to <50%	50% to <60%	≥60% women
Retention (women's attrition relative to men's)	Women's attrition >10% higher than men's	Women's attrition 5% to 10% higher	Women's attrition within ±5% of men's	Women's attrition up to 5% lower	Women's attrition >5% lower than men's
Leadership (% women in leadership roles)	<20% women leaders	20% to <30%	30% to <40%	40% to <50%	≥50% women leaders
Gender Pay Equity (median pay gap)	Pay gap >15%	Pay gap >10% to 15%	Pay gap >5% to 10%	Pay gap >0% to 5%	Pay gap ≤0%
Talent Pipeline (women in feeder/management roles)	<25% women	25% to <35%	35% to <45%	45% to <50%	≥50% women

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Appendix B: Consultation approach

To explore perceptions of gender diversity and identify opportunities to increase female participation in the Australian automotive dealership sector, KPMG conducted a program of qualitative stakeholder consultations. A total of 21 in-depth interviews were undertaken with participants across the automotive industry. The sample included representatives from:

- Four (4) small-to-medium sized dealerships (including family-owned dealerships)
- Seven (7) large corporate dealerships
- Ten (10) employees working across a range of automotive groups.

This mix of participants provided perspectives from both organisational leaders and employees, enabling the research to capture experiences across different dealership operating models, organisational structures and career stages. Interviews were conducted via Microsoft Teams and lasted approximately 45 minutes each. All interviews were recorded with participant consent to support accurate analysis and reporting.

A semi-structured discussion guide was used to ensure consistency across consultations while allowing participants to share their individual experiences and perspectives in depth.

Key topics explored included:

- Perceptions of gender diversity in the Australian automotive dealership sector
- Barriers and drivers influencing women's attraction to the industry
- Recruitment and workforce attraction strategies
- Workplace culture, inclusion and employee experiences
- Career progression, leadership pathways and retention of women
- Current initiatives and opportunities to improve female representation across dealership businesses.

Interview recordings and transcripts were analysed using Microsoft Copilot to support the initial review, summarisation and organisation of insights. Findings were then subjected to thematic analysis, with responses synthesised into recurring themes and patterns.

All interview recordings and transcripts were stored securely for the purposes of analysis and reporting. Consistent with KPMG's information management and privacy requirements, recordings and transcripts will be deleted following completion of the project and delivery of the final report. Findings have been reported in an aggregated and de-identified manner, with participant quotations used to illustrate key themes. This approach enabled the identification of key barriers, enablers and opportunities for increasing female participation in the automotive dealership sector.

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Appendix C: Survey methodology

A sample of n=750 Australian women who could potentially enter the automotive industry was collected. Whether a candidate was considered as a potential entrant to the industry was based on working age (18 – 64), whether they were currently working in a role, or searching for a role, with transferrable skills relevant to the automotive industry, and whether they were either currently working in an adjacent sector or willing to switch from their current non-adjacent sector. Women who were already working in the automotive industry were not included within the sample.

The sampling applied a nationally-representative on-entry approach. Due to the complex nature of the eligibility requirements of this sample, data was weighted using the incidence rate of working age women that passed the screener section and completed the survey within the broader group of all working age women who completed the screener section. The sample of working age women who completed the screener section was tracked against the distribution of women by state and age across Australia to produce a representative sample.

The average survey completion duration was approximately 10-minutes and consisted of 21 questions covering the follow topic areas:

- **Respondent profile:** Collected demographic information and employment status.
- **Industry choice drivers:** Explored factors that influence consideration of alternative industries
- **Industry perceptions:** Assessed perceptions of automotive retail and comparable industries.
- **Career consideration:** Measured likelihood of considering employment across different industries.
- **Motivators and barriers:** Identified factors influencing respondents' willingness to work in automotive and comparator sectors.
- **Decision-making factors:** Examined the reasons behind respondents' industry and career preferences.

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Appendix D: Assumptions and limitations

Assumptions

The analysis was developed using a combination of industry quantitative data, stakeholder consultations, industry surveys, and literature review. Assumptions that underpin the findings and conclusions presented in this report are outlined in Table 10.

Table 10: Analysis assumptions

	Assumption
Representativeness of industry data	• Workforce trends and gender outcomes observed within AADA member businesses are assumed to be broadly representative of the Australian automotive dealer sector. • WGEA reporting entities are assumed to provide a reasonable proxy for large dealership groups operating across Australia. WGEA reporting covers employers with 100 or more employees, so this assumption applies to the larger-employer segment of the sector rather than to all dealerships. • Australian Bureau of Statistics (ABS) and National Centre for Vocational Education Research (NCVER) data are assumed to accurately reflect broader workforce and apprenticeship trends relevant to the dealer sector. Noting that ABS industry figures are reported at ANZSIC group level rather than the WGEA class-level benchmark.
Reliability of stakeholder inputs	• Information provided through consultations, interviews and stakeholder engagement processes is assumed to have been provided in good faith and reflects participants' genuine experiences and observations. • Stakeholder views are assumed to provide valuable insight into workforce drivers and barriers, even where views differ across organisations or individuals.
Survey assumptions	• Respondents accurately reported their attitudes, experiences and perceptions. • The weighting methodology applied to survey results is assumed to adequately adjust for sampling effects and produce findings that are broadly representative of the target population. • Stated intentions regarding employment preferences, career choices and perceptions of the automotive dealer sector are assumed to be reasonable indicators of potential workforce behaviour, while recognising that intentions do not always translate into actual employment decisions.
Economic and workforce relationships	• Observed relationships between gender diversity and business outcomes identified in the literature are assumed to be broadly applicable to the Australian automotive dealer sector. • Evidence from other industries has been used where automotive-specific evidence was unavailable. It is assumed that findings from comparable industries provide a useful indication of potential outcomes within the dealer sector. • Workforce participation, retention and progression trends are assumed to be influenced by the structural, cultural and organisational factors identified through the research process.
Data comparability	• Data sourced from different organisations and reporting periods are assumed to be sufficiently comparable to support high-level analysis and conclusions. • Occupational classifications and industry definitions are assumed to align closely enough across data sources to enable meaningful comparison, subject to the class-versus-group scope difference noted in this report.

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Limitations

The findings of this report should be considered in the context of the limitations outlined in Table 11.

Table 11: Analysis limitations

	Limitations
Coverage of the member cohort	• The AADA member cohort is not a full representation of AADA members. It holds the member ABNs confirmed by and matched at the time of analysis by AADA. • WGEA records data by reporting entity (ABN). The member view therefore is dependent on the ABN list to be an accurate representation. Since groups commonly report under many separate entities.
Data availability and coverage	• The analysis relies on publicly available datasets, administrative data sources and information provided by stakeholders. Data availability constrained the level of detail possible in some areas of analysis. • Some workforce datasets do not distinguish between franchised automotive dealerships and other automotive retail businesses. As a result, findings relating to the broader motor vehicle retailing sector may not fully reflect the experience of all dealerships. • WGEA data is limited to organisations that meet legislative reporting thresholds and therefore may not capture the experiences of smaller dealerships. • ABS figures use ANZIC group 391 (Motor Vehicle Retailing). This is broader than the WGEA class 3911 (Car Retailing) benchmark, so the report compares the two only at a high level.
Correlation versus causation	• The report identifies relationships and associations between workforce characteristics, gender representation and business outcomes. The analysis does not establish direct causal relationships. • Improvements in gender representation may contribute to improved organisational outcomes; however, these outcomes are also influenced by a range of other business, economic and workforce factors.
Stakeholder consultation limitations	• Consultation findings are qualitative in nature and may not be representative of all views across the industry. • Participants were selected to provide a range of perspectives; however, consultation outcomes reflect the experiences and opinions of those who participated rather than the entire sector.
Survey limitations	• Survey findings reflect perceptions and self-reported intentions at a point in time. • Actual career decisions may differ from survey responses due to changing economic conditions, individual circumstances, or factors not captured in the survey. • Survey results are subject to standard sampling error and response bias risks associated with survey research.
Comparisons with other industries	• Benchmarking against industries such as construction, mining, energy and rail has been undertaken to provide context and identify potential lessons. Differences in workforce structures, operating environments and occupational composition may limit the direct transferability of findings. • International examples and case studies have been included where relevant; however, differences in labour markets, regulatory settings and cultural factors may affect their applicability to the Australian automotive dealer sector.
Changing workforce and market conditions	• Workforce demographics, labour market conditions, economic circumstances and employer practices continue to evolve. • Findings presented in this report reflect conditions at the time of analysis and may change as new data becomes available or industry conditions shift.

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Interpretation of findings

This report is intended to provide an evidence-based assessment of workforce participation, progression and gender equity within the Australian automotive dealer sector. The findings should be interpreted as directional indicators to support strategic decision-making rather than precise forecasts or predictions of future workforce outcomes. The report is not intended to provide legal, regulatory or industrial relations advice. All recommendations should be considered alongside the specific circumstances, objectives and operating environment of individual dealership groups and businesses.

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Appendix F: Glossary of key terms

Table 12: Glossary of key terms

Term or acronym	Definition
Australian Automotive Dealer Association (AADA)	National industry association representing franchised new-car dealers in Australia.
Australian and New Zealand Standard Industrial Classification (ANZSIC)	Standard framework used to classify businesses and industries for statistical analysis.
Australian Bureau of Statistics (ABS)	Australia's national statistical agency and a source of workforce and industry data used in the report.
Chief Executive Officer (CEO)	The most senior executive responsible for leading an organisation.
Environmental, Social and Governance (ESG)	Factors used to assess an organisation's environmental and social impacts and its governance practices.
Finance and Insurance (F&I)	Dealership function covering vehicle finance, insurance and related products.
Gross Value Added (GVA)	Measure of the economic value generated by an industry, calculated as output less intermediate inputs.
Human Resources (HR)	Business function responsible for workforce policies, recruitment, employee relations and development.
Jobs and Skills Australia (JSA)	Australian Government agency providing labour-market, workforce and skills analysis.
National Centre for Vocational Education Research (NCVER)	National body responsible for research and data on vocational education and training.
Organisation for Economic Co-operation and Development (OECD)	International organisation that undertakes economic and social policy research and analysis.
Technical and Further Education (TAFE)	Public vocational education and training providers in Australia.
Workplace Gender Equality Agency (WGEA)	Australian Government agency responsible for promoting and improving workplace gender equality and administering employer reporting requirements.
Workplace Gender Equality Agency Employer Census	Annual dataset compiled from reports submitted by eligible Australian employers to WGEA.

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Inherent Limitations

This report has been prepared as outlined with the AADA in the scope section of the engagement letter / contract dated 24 April 2026. The services provided in connection with this engagement comprise an advisory engagement, which is not subject to assurance or other standards issued by the Australian Auditing and Assurance Standards Board and, consequently no opinions or conclusions intended to convey assurance have been expressed.

No warranty of completeness, accuracy or reliability is given in relation to the statements and representations made by, and the information and documentation provided by stakeholders consulted as part of the process.

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