



TOI MAI

Workforce
Development
Council

Investment Advice

Overview

April 2023

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Overview and organisational priorities

This advice is submitted to the Tertiary Education Commission (TEC) in accordance with the functions of Workforce Development Councils set out in sections 366 (j) and 411 of the Education and Training Act 2020. This is the second round of advice sought from WDCs (the first theme-level advice was submitted in December 2022). In this second round of advice, WDCs have been asked to provide advice on the mix of vocational education and training that will inform content in the TEC's Supplementary Plan Guidance, to be published in early June 2023.

This document provides an overview of our sectors and advice, and needs to be read alongside the accompanying detailed data scan and insights in Appendix A.

Toi Mai is confident that the advice provided in this document and the Appendix is robust and evidence based with feedback from peak industry bodies integrated. Having said that, the following considerations underpin this advice:

- Toi Mai is a newly established organisation with recently formed subsectors (Ngā Peka o Toi), described in more detail on page 5. Only one (Toi Pāho) has a Workforce Development Plan. The remainder are scheduled for completion between now and the end of calendar year 2024.
- Although TEC has directed us to prioritise funding advice between our sectors, Toi Mai is unable to pit one off against another due to:
 - historic underfunding for many of our industries and vocational qualifications
 - the wide and diverse span of our sectors and providers; and
 - the absence of an overarching future-focused national industry policy to guide industry prioritisation.
- There is low data quality and availability across Toi Mai industries, particularly those in the creative and cultural sectors, which makes it hard to advise on actual numbers of funded learners required. Some sectors were not previously covered by industry training organisations (ITO). The hairdressing and beauty, equine, conservation, recreation and (parts of the) performing arts sectors are the exception here as they were covered by former ITOs. For the rest, most vocational education pathways are poorly developed or non-existent and data sources are limited, or non-existent in the case of Toi Māori.
- Toi Mai is in an extended discovery phase focused on developing stakeholder relationships with industry, providers, and key organisations. Over the next few years we anticipate getting to more granular levels of advice as we complete sector specific workforce development plans.

It is also important to acknowledge that workforce development gaps experienced by Toi Mai industries are not simply related to the provision of qualifications or investment in funded enrolments in the formal VET sector. Other priorities to be addressed include:

He wai mārama: making Ngā Peka o Toi roles visible, coherent and accessible

- Career pathways into, and knowledge about, Toi Mai industry roles are currently invisible and there are many biases at school level that rule rangatahi out of Toi Mai careers before they even leave school.

- A large proportion of the Toi Mai workforce is mid-career changers for whom current vocational education assumptions and provision do not suit (even after the vocational reforms).

Hei wao taunga manu rere: supporting people to enter and grow in our workplaces

- Many of the industries covered by Toi Mai do not provide culturally safe and inclusive workplace environments for workers, underpinned by a lack of awareness of what businesses and industries need to do to support workforce diversity and equity.
- There is an absence of diversity in senior and management roles in some Toi Mai industries.

Hei rākau whai hua: delivering training that meets the needs of Ngā Peka o Toi

- Formal government education funding, qualification and provider settings are still not fit for purpose or nimble enough to address industry need, despite the vocational reforms.
- A large proportion of the businesses Toi Mai covers are self-employed contractors/independent earners and SMEs that are too small to provide work-based learning.
- Current Unified Funding System (UFS) settings do not incentivise Te Pūkenga and other providers to deliver to smaller cohort, high technical skill-based qualifications needed by Toi Mai industries.

Hei aka here tahi, ka pū orange rau: working collectively to build and maintain a healthier Wao Nui o Toi

- It appears failed policy, industrial infrastructure and productivity settings may be contributing to insecure and unsustainable careers in the creative industries.
- Industrial classification metrics that disregard Ngā Toi Māori occupations and industries may be in potential breach of the government's Tiriti o Waitangi Article 2 responsibilities.
- Beyond the reporting and advising relationship of Toi Mai to the TEC, there is a need for a more cohesive partnership across education, government and industry to build a healthy and collaborative industry/training/workforce ecosystem. Toi Mai is working on this aspect and will be seeking support on this.

Ngā Peka o Toi – Toi Mai subsectors

The Baseline Data and Engagement project funded by TEC's COVID-19 Response Project Fund in December 2021 enabled us to develop a six-sector segmentation of our industries based on shared purpose and function rather than the ANZSIC and ANZSCO codes that do not reflect the diversity of Toi Mai occupations and industries. These are:

Toi Māori (Practitioners specialising in the creation of taonga works)

Toi Pāho (Broadcast and Screen)

Toi Puaki (Expressive Arts)

Toi Whānui (Enabling Technologies)

Toi ā-Ringa (Art and Design)

Toi Ora (Sport, Recreation and Cultural Organisations).

Each sector segmentation is a peka (tree branch) and part of the greater ngahere of Te Wao Nui o Toi. Te Wao Nui o Toi draws inspiration from Te Wao Nui a Tāne (The Great Forest of Tāne Mahuta), and uses the metaphor of a great, diverse, healthy and thriving ngahere (forest) ecosystem to describe the responsibility of Toi Mai towards the industries and occupations we were allocated by our Order in Council.



Toi Māori

Practitioners specialising in the creation and composition of taonga works and the oral arts. For example, weavers, carvers, tohunga tā moko, writers, musicians, mōteatea and kapa haka performers, composers and choreographers, visual artists, designers, waka and whareniui designers and builders. Low data makes it challenging to assess employment in this sector.



Toi Pāho

Content delivered through broadcast and screen media: film, radio, television and online interactive media, which includes advertising and the Game Development industry. Toi Pāho is the sector that creates engaging screen-based moving image and audio content for wide distribution. Of the Toi Mai sectors this is the largest employer of Māori and coped best throughout the pandemic.



Toi Puaki

Expressive art forms and technologies in music, stage, theatre, events, dance and creative writing. Toi Puaki, as part of one of the creative sectors, applies the creative process to show, reveal and give testimony (puaki) to ideas and thoughts through artistic and performance skills. This sector has the highest rates of self-employment and was one of the most negatively impacted by COVID-19 with the widespread closure of venues.



Toi Whānui

Innovative and emerging technology platforms, products and services for industry and end-users, including Artificial Intelligence, Cyber Security, Virtual Reality and Software as a Service (SaaS). Toi Whānui involves inventions that are applied to enable and improve user capabilities. It is the largest of the Toi Mai workforces and has grown rapidly (largely through migration), but has low employment of Māori, Pacific people and women.



Toi ā-Ringa

Hands-on (haptic/tactile) art and design, hairdressing, beauty, fashion, advertising, visual media and communication. Toi ā-Ringa uses a range of tools, materials and technologies to shape creative outputs. Almost three in four people in this sector are women, and hairdressing is the largest of the Toi ā-Ringa occupations.



Toi Ora

Activities and places that foster the social, physical and mental wellbeing of the people of Aotearoa. This includes sport and recreation organisations, as well as cultural organisations that welcome visitors and share, or conserve, our natural environment and culture (parks, zoos, galleries, libraries, archives and museums). Toi Ora is the sector that provides places and facilities for New Zealanders and visitors to engage with activities for relaxation, education, research, conservation, wellbeing and human connection. Of all the Toi Mai sectors this has the greatest regional presence.

Toi Mai Workforce Overview

TOI MAI
Workforce
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Toi Mai Total

GDP

GDP 2022

\$19,225M NZ total **\$357,710M**

GDP per FTE 2022

\$147,950 NZ total **\$148,629**

WORKFORCE

Total 'core' workforce size 2019

161,076

NZ total **2,648,000**

Total 'casual' workforce size 2019

169,906

Year on year % workforce size change



Total 'core' workforce size 2020

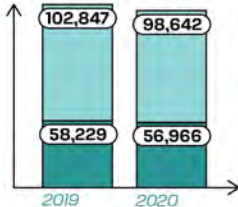
144,674

NZ total **2,715,000**

Total 'casual' workforce size 2020

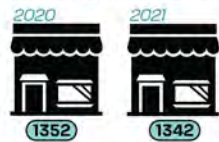
164,284

% of NZ workforce



MĀORI BUSINESS

Number of Māori businesses



9%

% of Māori businesses

% of significant employers of Māori **4%**

Number of significant employers of Māori 2020

526

RETENTION

1 yr retention **70%**

3 yr retention **42%**

5 yr retention **30%**

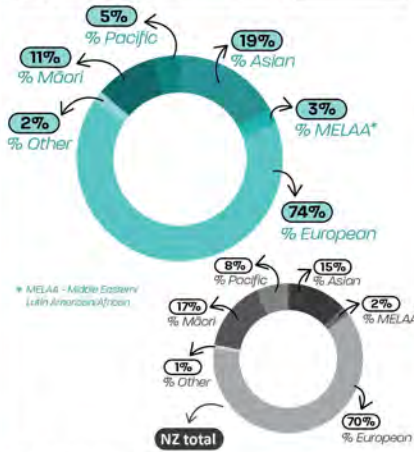


How long a cohort of new entrants will remain working in an industry before leaving

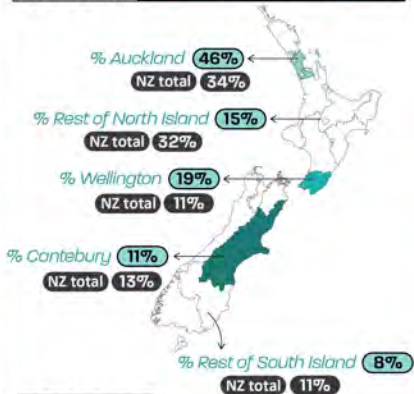
AGE



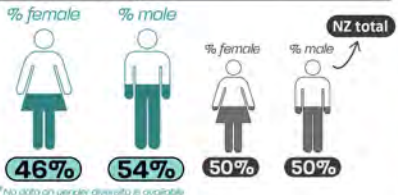
ETHNICITY (total response)



REGION

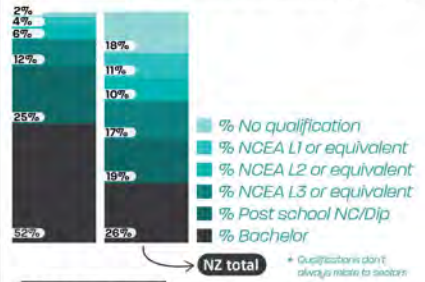


GENDER



*No data on gender diversity is available

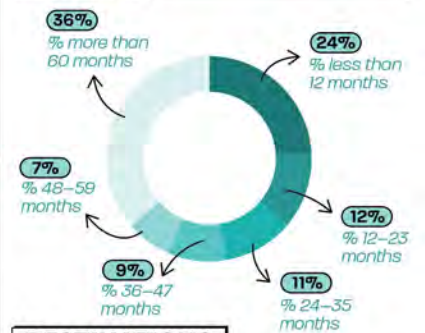
HIGHEST QUALIFICATION



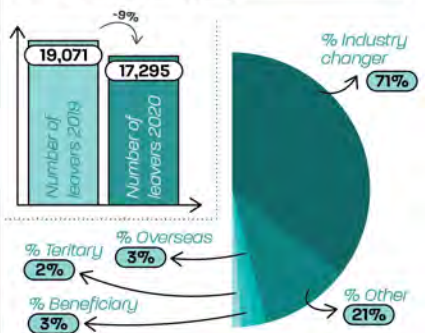
ORIGINS



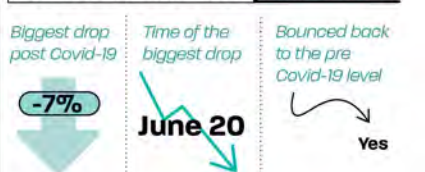
TENURE



DESTINATIONS



COVID-19 IMPACT



Calculating current and future demand for Toi Mai qualifications

Evidence-base

Te Taumata Tiroiro Rāngai (Toi Mai Strategy and Insights Team) has primary responsibility for gathering evidence-based data and providing advice to TEC. From ground zero on start-up, when there was no centralised database of information about Toi Mai industries, the team has been accessing data from Infometrics, Scarlatti and the IDI, and commissioned research and industry surveys (Screen and Tech) to start informing our advice to TEC. We still have only early data on most industries and will not be in a position to provide granular enrolment and pathways advice until we have completed all our WDPs by the end of calendar year 2024.

Approach to Mix of Provision

The approach taken by Toi Mai to prioritising the mix of vocational education and training advice is as follows:

Industry feedback from the past 17 months underpins our advice.

We have focused on the five largest qualifications/occupations per subsector and particular qualifications/issues beyond the five biggest quals highlighted by peak bodies as important.

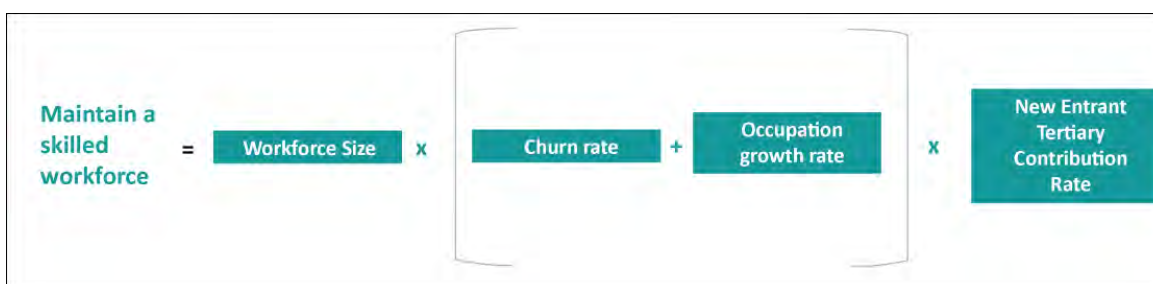
We have based our investment advice to TEC on a calculation assessing workforce size, attrition/churn rate, forecasted growth rates, and tertiary graduates.

We have verified with peak industry bodies the accuracy of the estimated number of new skilled entrants needed by industry for a certain role or occupation.

Due to time and resource constraints with this April advice we have not yet developed a process for integrating the intelligence gathered through the endorsement process to inform advice to TEC; but over 2023/24 we will build this into the process.

Due to time and resource constraints, we have also not yet developed a formalised approach to engage providers on how they can operationalise your advice; but over 2023/24 we will build this into the process.

Calculation to assess current and future workforce skill shortages



Maintain a skilled workforce – Estimated number of people needed by industry for a certain role or occupation.

Workforce size – Number of employees / Employment size (based on Infometrics data).

Churn rate / Attrition rate – Percentage of people who move out of the industry at a

particular period (with the BED project report as data source).

Occupation growth rate – Growth in employment size / how much employment is growing or shrinking across a certain period (based on Infometrics data).

New Entrant Tertiary Contribution Rate – Percentage of people entering the industry who come from tertiary (based on Scarlatti data).

Please see Appendix A for the detailed data scan and insights.

Toi Whānui – Emerging Technologies

The New Zealand technology sector is fast-growing, with ongoing and consistent growth. Overall, the sector contains a range of industries, which include software development, IT services, telecommunications, e-commerce, fintech and digital media, among others. The sector is a significant contributor to the New Zealand economy, with the potential to create many high paying jobs and drive innovation and exports.

The largest occupations in the New Zealand tech industry include:

Software Developer/Engineer, ICT Support specialist, ICT Project Manager, Business Analyst, Network and Security Specialist and Software Tester/Testing Analyst with a growing need in specialisations including cyber security, software sale, IT project management and leadership and upskilling packages on vendor specific cloud platforms.

Note: Game Development is included under Toi Pāho.

Digital skills

Due to the way it was set up and funded, Toi Mai is focused on upskilling and reskilling for the digital technology workforce (the top half of the pyramid below) only. However, the rest of the economy and post-secondary population also needs digital technology skills development and training. How this is to be enabled requires further consideration by government.



Barriers

Despite all the benefits and opportunities provided by the tech industry, only 4% of the digital tech workforce is Māori, while Pacific Peoples represent only 2.8%, and women make up just 27% of the digital technologies workforce. The participation rates of neurodivergent and disabled people is less known. However, Internet NZ reports that those with disabilities face greater digital exclusion than almost all other groups. Participation of LGBTQIA+ people in the tech workforce is even harder to gauge.

Toi Mai has been engaging with affected communities as part of qualitative research into the barriers faced by learners and workers in the technology workforce. Recommendations for how to address these barriers will be included in the Toi Whānui WDP which is about to get underway.

Significant student and industry demand for technology bootcamp courses not met by current TEC funding

Bootcamp-style technology providers which run shorter and intense work-ready programmes are experiencing continued growth in demand from students. Industry have indicated the need for more work ready juniors which bootcamp-style provision delivers. Providers' immediate challenge is to secure TEC funding to meet current student demand.

Despite the short-term decrease in numbers due to the ending of the TTAF, bootcamp-style providers expect demand of approximately +20% year on year for the next three years. Providers' ability to serve student and industry demand is limited in part by TEC funding constraints. It is difficult for providers to invest in serving the demand (through marketing and additional delivery capacity) due to current EFTS caps and lack of long-term funding certainty.

There is significant social and economic value transitioning people into work in tech, of which bootcamp providers do relatively quickly. Increasing the funding certainty for technology providers would enable them to invest and attract underrepresented audiences, particularly Māori, Pacific and people based in the regions.

Some tech bootcamp-style providers are expanding with regional campuses planned and pilot partnerships for the wider regions, which also matches Regional Skill Leadership Group regional workforce development need.

Toi Whānui Investment Advice

Occupation/ Qualification	Increase/ Reduce/ Change	Notes
Systems Analyst	Maintain	Consolidate existing provision to lift quality
Software Tester/ Engineer	Increase for career changers	Most grads will start as testers, move on to engineers over time. Limited training aimed at career changers
IT Support Technician	Maintain	Major feeder for further learning. Shift to work-based learning to attract diversity
Web Developer	Maintain	Greater diversity needed
Cybersecurity	Increase	Need for a new L4 introductory micro-credential to improve diversity & accessibility

Māori Data Analytics	N/A	Need for new micro-credentials covering Māori/ iwi data analytics, storing iwi related data and Māori data governance more broadly
Project Manager IT Sales Product Managers	Create & increase provision for career changers. SaaS Academy is scoping these needs further.	Product sales and IT project & product managers have been identified by industry as a significant need which career changers are often well suited to. Current training options do not enable graduates to be work ready for IT product manager roles. Need for short training options to enable career changers to upskill into these non-technical roles, as well as a need to support intermediate staff already working in IT to upskill into project management roles. Investment is needed into both qualification and programme development to meet this need.
Cert in Info Tech (L4,5)	Maintain	Feeder course for improving diversity of tech sector
Cert in Computing (L2,3,4)	Maintain	Important for digital literacy across economy
ALL – Māori & Pacific	Increase and broaden provision	MPTT funding is working but stops at Level 4. Work readiness in tech is level 5–6. MPP also funds scholarships in tech, these should apply to vocational education not just degree level.

Note: There are many micro-credentials in development across the sector. As part of our Toi Whānui Workforce Development Plan we will bring providers together with the aim to consolidate and prioritise these

Toi Mai recommends TEC investment in the following new qualifications for Toi Whānui in 2024

Toi Peka	Qualification Title	Status
Toi Whānui	NZC in Applied Software Development (Level 6)	Listed with NZQA Aug 2022
	NZC in IT Support (Level 5)	Skill standard development underway for work-based learning programme development in 2024
	Micro-credential – foundation digital skills (Level 3) – bridging to L4 qualifications	In planning, expected to be available for 2024 delivery

GDP

GDP 2022

\$8,931M NZ total **\$357,710M**

GDP per FTE 2022

\$177,272 NZ total **\$148,629**

WORKFORCE

Total 'core' workforce size 2019

54,930

NZ total **2,648,000**

Total 'core' workforce size 2020

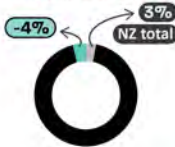
52,930

NZ total **2,715,000**

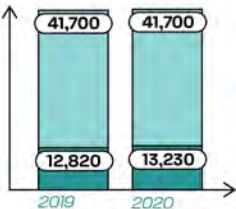
Total 'casual' workforce size 2019

54,120

Year on year % workforce size change

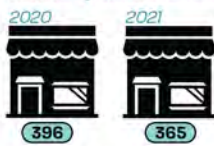


% of NZ workforce



MĀORI BUSINESS

Number of Māori businesses



5%

% of Māori businesses

% of significant employers of Māori

3%

Number of significant employers of Māori 2020

97

RETENTION

1 yr retention

79%

3 yr retention

47%

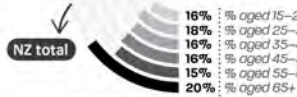
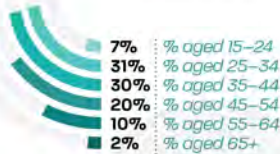
5 yr retention

27%

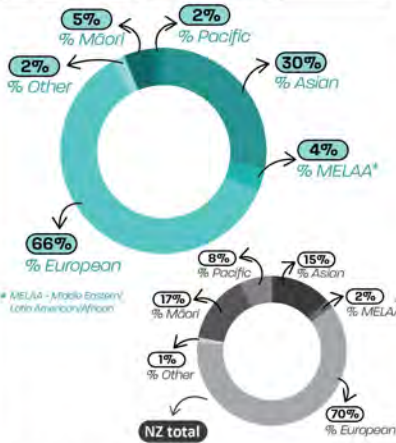


How long a cohort of new entrants will remain working in an industry before leaving

AGE

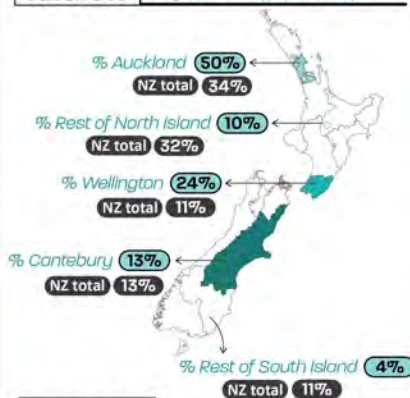


ETHNICITY (total response)

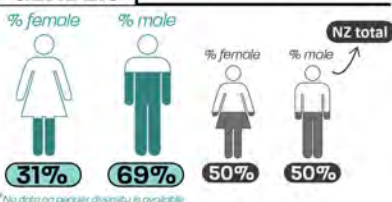


REGION

The regional distribution of people in the workforce

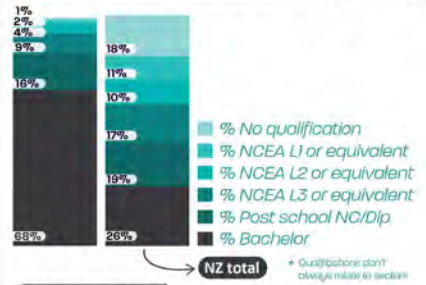


GENDER

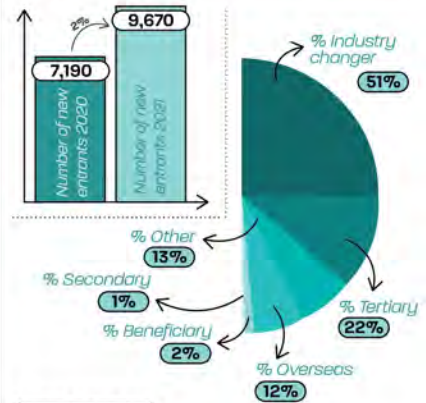


*No data on gender diversity is available

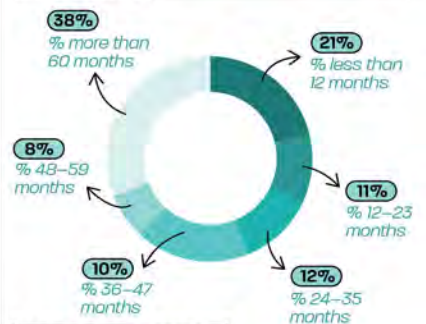
HIGHEST QUALIFICATION



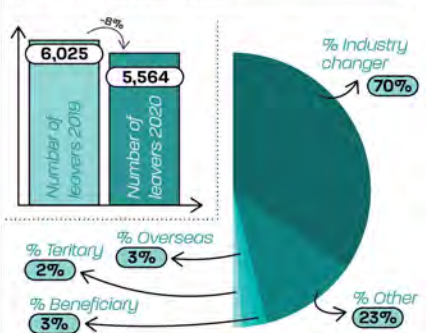
ORIGINS



TENURE



DESTINATIONS



COVID-19 IMPACT

Change in employee numbers followed after Covid-19

Biggest drop post Covid-19

Kept growth trend even during Covid-19

Toi Pāho – Broadcast & Screen

Toi Pāho covers occupations that deliver moving image and audio content through broadcast and screen media: film, radio, television, and online interactive media, which includes advertising and the game development sector.

Occupations in Toi Pāho include: Game Artist, Photography Assistant, Lighting Director, Camera, Costume, Animation Supervisor, Camera, Sound Technician, Composer, Digital Imaging Technician, Editor, Construction/Props Maker, Game Programmer, Writer, Journalist, Producer, Radio Presenter, Television Reporter, Vlogger, Wardrobe Coordinator, Foley Artist, Grip, Gaffer, Creative Director, Account Manager, Media Buyer, Columnist, News Editor, Feature Writer (and many more)

Toi Mai investment advice for the Broadcast & Screen sector is informed by extensive consultation with the sector to develop the Toi Pāho below-the-line Workforce Development Plan https://www.toimai.nz/assets/Uploads/Toi-Mai-Forms/FINAL_Te-Wao-Nui-o-Toi.pdf

The Toi Pāho report contains many recommendations relating to career pathways and options for those seeking to be employed in the screen sector. Toi Mai looks forward to discussing these with TEC once we have received and consolidated feedback from industry (expected by the end of May 2023).

Toi Pāho Investment Advice

Occupation/ Qualification	Increase/ Reduce/ Change	Notes
Journalist	Increase	Need specialised, work-based training especially those with lived experience of being Māori and fluency in te reo. The Te Rito partnership of four media organisations (NZME, Whakaata Māori, Newshub and Pacific Media Network) backed by NZ on Air's Public Interest Journalism Fund has been an exemplar of the type of apprenticeship-style funding and training that needs greater investment.

Below the Line Occupations such as: Camera operator Costume Art Dept Editor Grip Gaffer Game developer Animator Construction Location	Increase	<p>Continued growth in this sector through the pandemic, coupled with poor alignment of training to extant skills shortages, has resulted in the sector asking for more work-based or work-integrated short courses / micro-credentials that are industry-led, stackable and nimble.</p> <p>There is an oversupply of graduates with level 7+ degrees and yet they are not well-prepared for entry to the sector.</p> <p>Review and develop VET training at levels 4–6 and ensure all graduate performance outcomes align closely with industry and are industry endorsed (review of level 5/6 Dip Screen Production is underway).</p> <p>Increase upskilling/professional development opportunities for those employed in a gig-based workforce that are short, accessible and relevant.</p> <p>Increase provision of sector specific, short business skills courses to equip workers for work in a gig economy (as contract workers or self-employed)</p> <p>Shorter, work-based training courses open the doors to a more diverse workforce, including Māori, Pacific, women and other underserved communities and enable sustainable career pipelines for the sector.</p> <p>The sector is noted for its mid-career changers. There is need for more short courses that facilitate relatively swift entry to this sector</p>
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Toi Mai recommends TEC investment in the following new qualifications for Toi Pāho in 2024

Toi Peka	Qualification Title	Status
Toi Pāho	NZC in Content Creation (Level 4)	Listed with NZQA Feb 2023
	NZD in Content Creation (Level 5)	Listed with NZQA Feb 2023
	NZD in Journalism (Level 5)	Listed with NZQA March 2023
	NZC in Screen Industry Craft (Level 4)	In development, expected to be available for 2024 delivery
	Micro-credential – Introduction to Aotearoa New Zealand Screen Industry (Level 3)	In development, expected to be available for 2024 delivery

GDP

GDP 2022

\$2,988M NZ total **\$357,710M**

GDP per FTE 2022

\$188,282 NZ total **\$148,629**

WORKFORCE

Total 'core' workforce size 2019

26,100

NZ total **2,648,000**

Total 'casual' workforce size 2019

27,235

Year on year % workforce size change



Total 'core' workforce size 2020

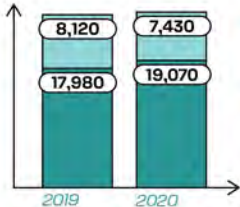
25,415

NZ total **2,715,000**

Total 'casual' workforce size 2020

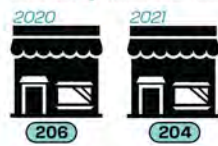
27,230

% of NZ workforce



MĀORI BUSINESS

Number of Māori businesses



13%

% of Māori businesses

% of significant employers of Māori **8%**

Number of significant employers of Māori 2020

53

RETENTION

1 yr retention



3 yr retention

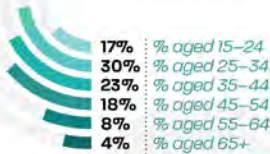


5 yr retention

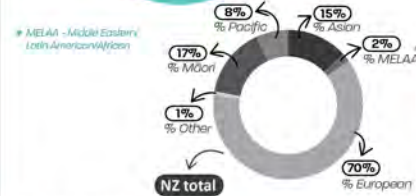
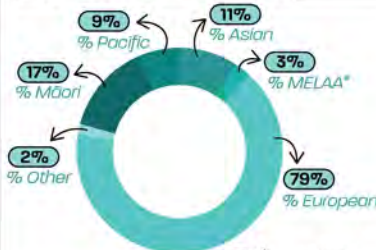


How long a cohort of new entrants will remain working in an industry before leaving

AGE

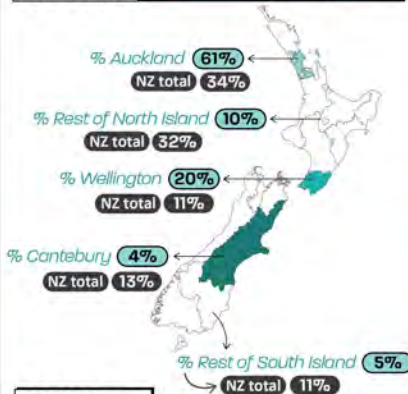


ETHNICITY (total response)

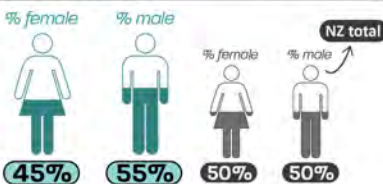


REGION

The regional distribution of people in the workforce

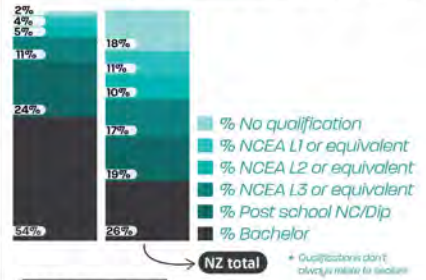


GENDER

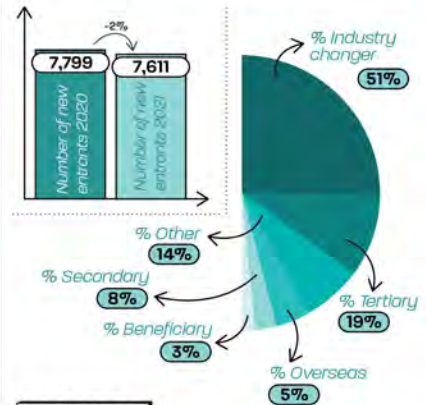


*No data on gender diversity is available

HIGHEST QUALIFICATION



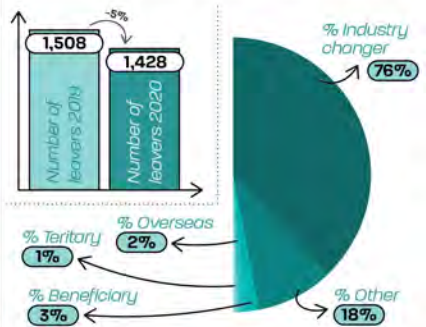
ORIGINS



TENURE



DESTINATIONS



COVID-19 IMPACT

Change in employee numbers before and after Covid-19

Biggest drop post Covid-19



Time of the biggest drop



Bounced back to the pre-Covid-19 level

Close to pre-Covid-19 level

Toi Ora – Sport, Recreation and Cultural Organisations

Toi Ora covers occupations that engage users in activities and technologies that foster wellbeing, physically, mentally and socially.

Occupations in Toi Ora include: Construction diving, Fitness Instructors, Sports coaches and/or instructors, Kaimahi in art galleries, libraries, archives and museums, environmental conservation, outdoor guides and outdoor education leaders.

The advice below is split into Sport and Recreation; and Galleries, Libraries, Archives, Museums, & Iwi Records (GLAMIR)

Toi Ora Investment Advice: Sport and Recreation

Occupation/ Qualification	Increase/ Reduce/ Change	Notes
Construction divers	Increase	Increase provision. Please see note below for further details*
Fitness instructors	Increase	Industry needs to grow back to pre-covid levels
Lifeguards	Increase	National shortage of lifeguards. Many pools closing early (seasonal) or having to run at reduced capacity. Support for micro-credentials for Pool Lifeguard Awards.
Swimming coach / instructors	Maintain	National shortage of swim instructors / important role for national swimming capability.
Diving Instructors (open water)	Maintain	A previous version of this advice incorrectly recommended a decrease to provision. This was an oversight by Toi Mai that we have since clarified with TEC.
Outdoor Education (guides and instructors)	Increase	Expensive courses to run with respect to tutor/learner ratios, outdoor trips, equipment etc. Providers are concerned that UFS changes to their funding categories will further inhibit their ability to produce well-equipped graduates for the industry. Support for micro-credentials in Rafting industry.
Park Ranger / Conservation Officer	Increase	Limited on the job training available in current qualification provision(s) leading the sector to develop their own on the job study programmes to deliver the breadth of skills industry require. Micro-credentials may be developed in future to support work-based learning.

*Currently no vocational education funding for commercial diver training

Toi Mai represents both recreation and construction and commercial diver training. Commercial diving is an application of professional diving where the diver engages in underwater work for industrial, construction, engineering or maintenance purposes. Commercial diving was classified as an essential service in the COVID-19 level 3 and 4 lockdowns.

The construction diving industry has provided detailed evidence of significant workforce and skill shortages in their sector. Toi Mai and Waihangā Ara Rau have carried out further research to verify

the shortages and demonstrate the future construction and infrastructure project pipeline needs.

The overall number of Worksafe NZ issued new Certificates of Competence (CoC) for construction divers has decreased drastically over the last five years from 102 in 2018 to 22 in 2022. Commercial dive employers have provided evidence of the pressure this is putting on their existing staff and their businesses as they have to turn work away due to trained staffing shortages.

As with any industry, it is very difficult to quantify and forecast exact vacancies needing to be filled. The need for qualified graduates also includes science (NIWA), aquaculture, Police, and Navy as well as smaller construction diving companies. Averaging new WorksafeNZ CoCs issued over the past five years equates to 64 new CoCs per year. This number also includes new immigrants to New Zealand with overseas construction diving qualifications that meet the WorksafeNZ requirements and divers returning to the industry.

Industry have stated clearly that there is a significant shortage of commercial divers in New Zealand and Toi Mai shared their concern that there is currently no TEC funding to support providers offering our qualifications in construction diving.

Toi Mai is advising that the small and niche construction diving industry be considered a priority in TEC's investment for 2023 and 2024.

Toi Ora Investment Advice: Galleries, Libraries, Archives, Museums, & Iwi Records (GLAMIR)

Occupation/ Qualification	Increase/ Reduce/ Change	Notes
Conservator	n/a	No provision of conservator qualifications in Aotearoa which contributes to workforce shortages. The sector is seeking to develop an entry level qualification for an Indigenous Conservation Technician.
Archivist; Records Manager	Increase	More emphasis is given to digital skills and consequently investment needs to prioritise capability in the learning and development of digital skills.
Librarian	Maintain	Good sector initiatives to support workforce capability and funding available to aid workforce growth and diversity.
Museum Educator	Maintain	There are no museum educator qualifications currently.
Museum Curator	Maintain	Sector feedback suggests ideal vocational pathway is studying NZC in Museum Practice – Level 4 prior to moving into degree level qualifications (instead of the other way around). There is an emergent need for qualifications in targeted Curatorial qualifications, but we do not have sufficient information to advise on this yet.

Toi Mai recommends TEC investment in the following new qualifications for Toi Ora in 2024

Toi Peka	Qualification Title	Status
Toi Ora	Micro-credential – Exercise Fundamentals (Level 3)	In development, expected to be available for 2024 delivery
	Micro-credential – Community Coach/Leader	In planning, expected to be available for 2024 delivery
	Micro-credentials – Conservation	Identified need, may be available for 2024 delivery

GDP

GDP 2022

\$5,015M NZ total **\$357,710M**

GDP per FTE 2022

\$119,047 NZ total **\$148,629**

WORKFORCE

Total 'core' workforce size 2019

40,642

NZ total **2,648,000**

Total 'core' workforce size 2020

34,574

NZ total **2,715,000**

Total 'casual' workforce size 2019

46,892

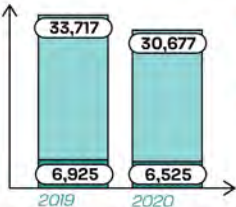
year on year % workforce size change



Total 'casual' workforce size 2020

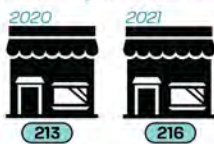
43,018

% of NZ workforce



MĀORI BUSINESS

Number of Māori businesses



13%

% of Māori businesses

% of significant employers of Māori

5%

Number of significant employers of Māori 2020

156

RETENTION

1 yr retention

49%



3 yr retention

19%



5 yr retention

9%

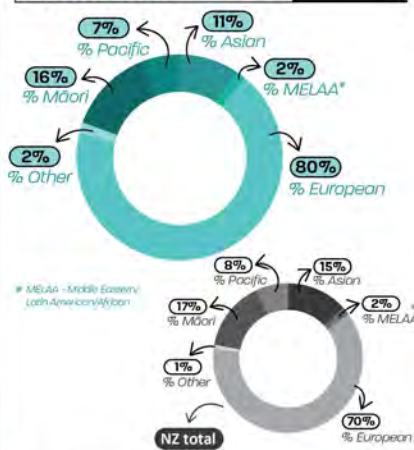


Having a cohort of new entrants will retain working in industry before leaving

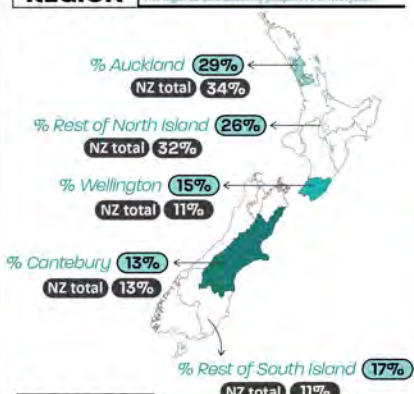
AGE



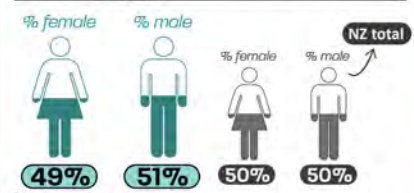
ETHNICITY (total response)



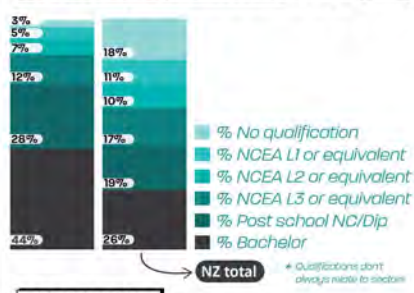
REGION



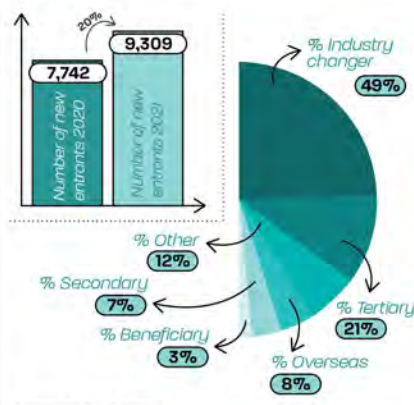
GENDER



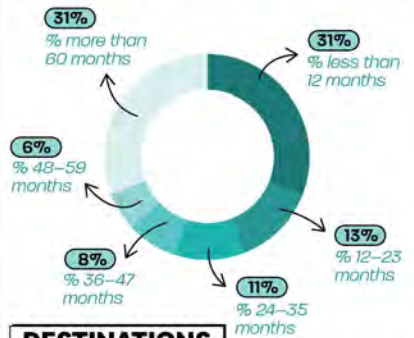
HIGHEST QUALIFICATION



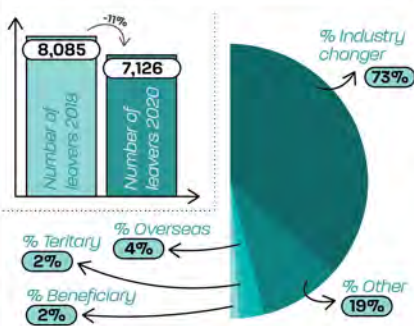
ORIGINS



TENURE



DESTINATIONS



COVID-19 IMPACT



Toi ā-Ringa – Art and Design

The Toi ā-Ringa sector includes hands-on (haptic/tactile) art and design, hairdressing and barbering, beauty, fashion, advertising, visual media and communication. Toi ā-Ringa practitioners use a range of tools, materials and technologies to shape creative outputs. Almost three in four people in this sector are women, and hairdressing is the largest of the Toi ā-Ringa occupations.

Toi ā-Ringa Investment Advice

Occupation/ Qualification	Increase/ Reduce/ Change	Notes
Fashion / Apparel Industry	n/a	Oversupply of fashion graduates with degrees. To look at technical related new quals in collaboration with Hanga Ara Rau. There is a shortage of graduates with technical and operational skills.
Hairdressing and barbering	Maintain	Toi Mai is addressing qualifications to improve training delivery.
Floristry	Maintain	Good sector initiatives to support workforce capability and funding available to aid workforce growth and diversity.
Make-up	Maintain	Increase work-based learning and connection to the industries they serve, eg. the screen sector

Toi Mai recommends TEC investment in the following new qualifications for Toi ā-Ringa in 2024

Toi Peka	Qualification Title	Status
Toi ā-Ringa	Micro-credentials – Business Skills for Creative sector/ freelancing in gig economy (Levels 3–5)	In planning, expected to be available for 2024 delivery

GDP

GDP 2022

\$2,470M NZ total **\$357,710M**

GDP per FTE 2022

\$102,835 NZ total **\$148,629**

WORKFORCE

Total 'core' workforce size 2019

27,024

NZ total **2,648,000**

Total 'casual' workforce size 2019

28,599

Year on year % workforce size change



Total 'core' workforce size 2020

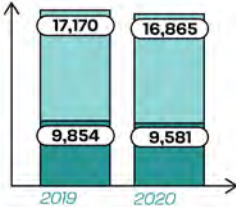
22,655

NZ total **2,715,000**

Total 'casual' workforce size 2020

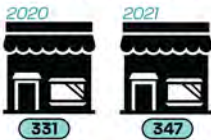
28,546

% of NZ workforce



MĀORI BUSINESS

Number of Māori businesses



9%

% of Māori businesses

% of significant employers of Māori **4%**

Number of significant employers of Māori 2020

172

RETENTION

1 yr retention

69%



3 yr retention

33%



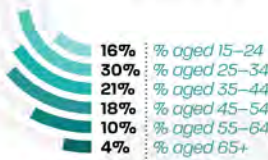
5 yr retention

17%

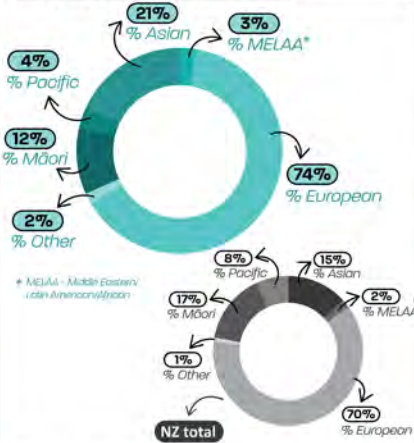


Having a cohort of new entrants will remain working in an industry before leaving

AGE

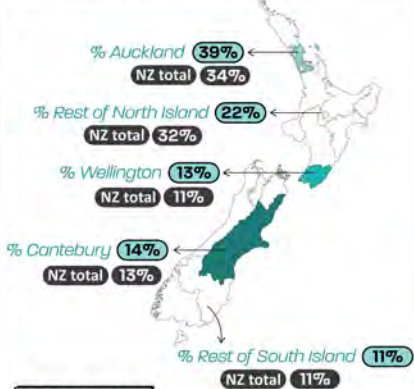


ETHNICITY (total response)

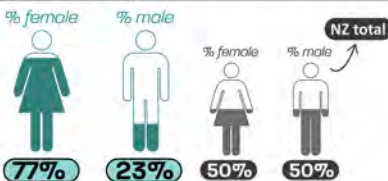


REGION

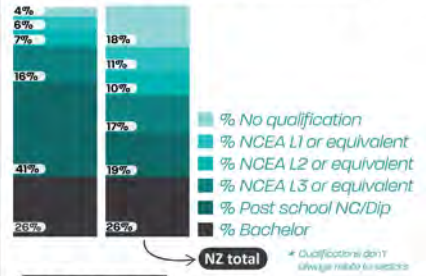
The regional distribution of people in the workforce



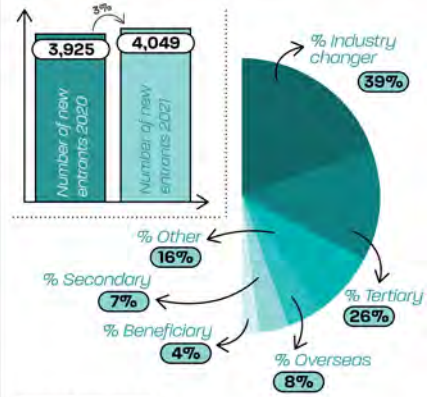
GENDER



HIGHEST QUALIFICATION



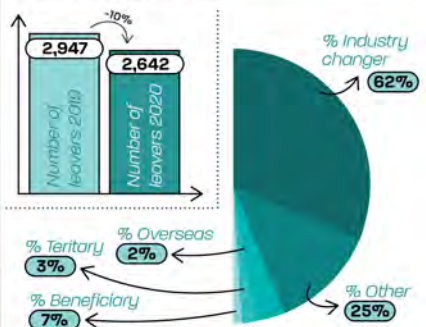
ORIGINS



TENURE



DESTINATIONS



COVID-19 IMPACT

Change in employee numbers before and after Covid-19

Biggest drop post Covid-19

Hardly dropped

Toi Puaki – Expressive Arts

Toi Puaki includes the expressive and performing arts and technologies in stage performance, production and design, music distribution and creative writing

Disciplines include (but are not limited to):

- Dance: Kapa Haka, Pacific dance, Contemporary, Ballet, Jazz, Urban, Hip-hop
- Music: Waiata, Pacific music, Hip-hop, R&B, Reggae, Opera, Orchestral, D.J.
- Theatre: Haka Theatre, Pacific Theatre, Theatre, Musical Theatre, Improv
- Circus: Aerial, Acrobatics, Dancers, Poi swingers, Fire dancers, Clown and Mime
- Spoken-Word: Poetry, Comedy
- Written Word: Creative Writing
- Multi-discipline: Works that combine multiple art forms

Small courses

Toi Puaki industry feedback to Toi Mai includes frustration that the UFS does not incentivise provider delivery of the small but highly skilled programmes that support this complex sector. For example, the number of piano tuner graduates needed each year is small (5–10), but the impact on the music is huge.

Toi Mai has observed with concern a number of recent music programme closures by vocational providers (e.g. Te Pūkenga/MAINZ, Weltec/Whitireia), aligned with a trend towards degree and university provision. Universities have greater access to capital resources to fund recording studios and rehearsal spaces. However, this takes music training increasingly out of reach for learners who are unable to access university education or music education outside the big cities. With most university music provision currently being accessed by Pākehā learners, there is an urgent need for sub degree provision targeted at underserved and regional learners.

Music courses may never attract large enrolments, but this does not mean they are not highly skilled or contributing to an industry of huge cultural importance and with massive export potential.

Toi Puaki Investment Advice

Occupation/ Qualification	Increase/ Reduce/ Change	Notes
Musician	Increase	With borders re-opening, Recorded Music NZ says touring for NZ artists internationally is back at pre-Covid levels. NZ artists being recognised globally impacts all industries of Aotearoa and therefore should be considered in assessing investment decisions for this sector, not just consideration of domestic retention and skills need.

Event Operators	Increase	Massive shortage post Covid with a high number of technicians leaving the industry. Peak bodies covering festivals, theatre, dance and music, have all experienced difficulties securing technical event skills for their live events.
Author	N/A	Qualifications for Creative Writing (which produces Author) currently sit with Te Pūkenga as the qualification developer. A review of these qualifications has just begun and in this process, qualifications will be transferred to the guardianship of Toi Mai.

Toi Mai recommends TEC investment in the following new qualifications for Toi Puaki in 2024

Toi Peka	Qualification Title	Status
Toi Puaki	NZC in Piano Tuning and Technology (Level 4)	In development, expected to be available for 2024 delivery. Designed to work as an apprenticeship programme
	New qualification for Circus	Identified need, may be available for 2024 delivery
	Micro-credential – Digital/Creative Entrepreneur (Level 3)	In planning, expected to be available for 2024 delivery

GDP

GDP 2022

\$663M

NZ total
\$357,710M

GDP per FTE 2022

\$102,465

NZ total
\$148,629

WORKFORCE

Total 'core' workforce size 2019

12,380

NZ total
2,648,000

Total 'core' workforce size 2020

9,100

NZ total
2,715,000

Total 'casual' workforce size 2019

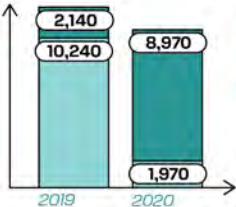
13,060

Year on year % workforce size change
-26%

Total 'casual' workforce size 2020

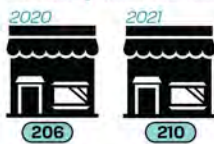
11,560

% of NZ workforce
0%



MĀORI BUSINESS

Number of Māori businesses



15%
% of Māori businesses

% of significant employers of Māori
9%

Number of significant employers of Māori 2020

48

RETENTION

1 yr retention **88%** 3 yr retention **27%** 5 yr retention **12%**

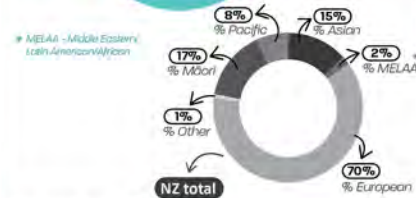


How long a cohort of new entrants will remain working (not industry) before leaving

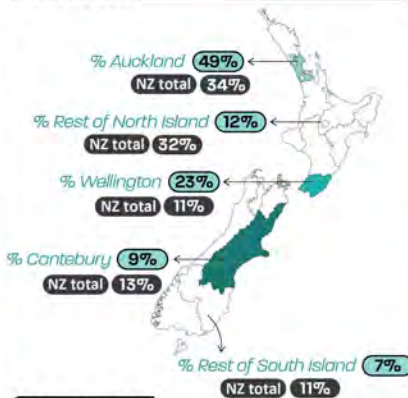
AGE



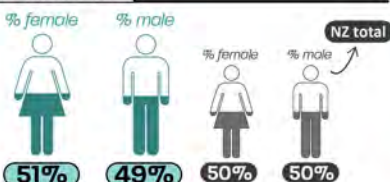
ETHNICITY (total response)



REGION

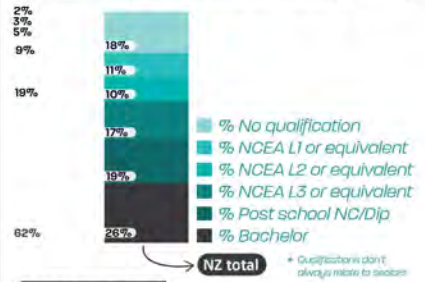


GENDER

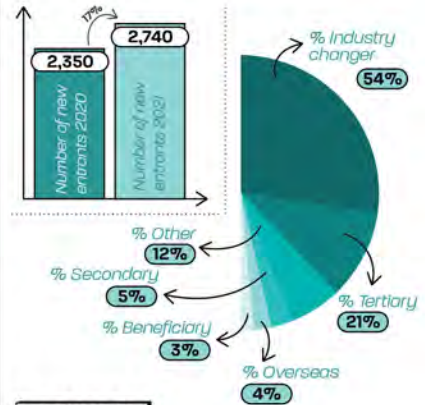


*No data on gender diversity is available

HIGHEST QUALIFICATION



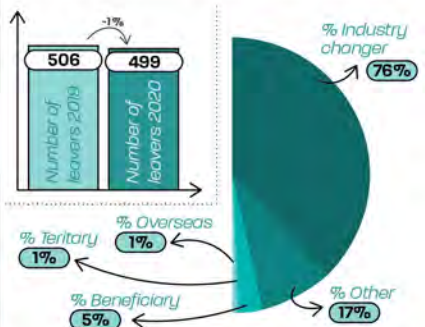
ORIGINS



TENURE



DESTINATIONS



COVID-19 IMPACT



Toi Māori – Practitioners that specialise in the creation of taonga works and the oral arts

The following occupations have been identified as existing within Ngā Toi Māori. Note, this list is not exhaustive:

Weavers, carvers, tohunga tā moko, writers and musicians specialising in te reo Māori, pūrākau, whakapapa and kōrero a iwi, mōteatea, kapa haka composers and choreographers, visual artists, designers and graphic designers, waka and whare designers and builders, museum curators, conservators, researchers, educators and repatriation specialists, archivists, kaiako / teachers or instructors. Some of these occupations also exist in other Peka, e.g. museum occupations that currently fall under Toi Ora.

Qualification Developers for Toi Māori

Most of the qualifications and standards available to ākonga in the Toi Māori sector are currently held by the Ratonga Tohu Mātauranga Māori / Māori Qualifications Service at NZQA.

While there may be good reasons why NZQA retains this role, the split of responsibilities means we have no national overview of who is providing what and where, whether ākonga are being trained in the areas of greatest industry need or the destination graduates are going post study, no way of connecting provision with demand, and no way of targeting qualification development to industry need.

There are also no industry ANZSIC codes assigned to Toi Māori occupations (which is why an infographic for Toi Māori is consequently not available). The absence of occupational coding is a major barrier to Toi Mai being able to provide advice to TEC and create qualifications to meet industry need.

There are also no Toi Māori jobs listed on Tahatū. Toi Mai has commenced engagement with TEC to discuss adding Toi Māori jobs onto this platform.

Toi Mai has already commenced engagements with the Toi Māori sector to identify their qualification and training needs in advance of a major piece of work in 2023–24 to form a Ngā Toi Māori Workforce Development Plan. This aim is to render the wide range of Toi Māori industries and occupations visible so we are better able to provide skills and workforce leadership and provide advice to the TEC on its investment in vocational education and training.

Toi Mai understands that a significant proportion of skill development and training already occurs informally and often within cultural settings including wānanga and hui, processes which take place all over ngā motu. As part of the Toi Māori WDP, we will map both formal and informal training in the sector to identify how best Toi Mai and TEC can support VET in this vitally important sector.

Toi Māori Investment Advice

Occupation/ Qualification	Increase/ Reduce/ Change	Notes
Toi Māori qualifications	n/a	Insufficient data to assess main occupations in Toi Māori, but this is a critical industry to develop awareness of and supporting vocational education and training in, in the future.