TOI MAI 2025 DIGITAL SKILLS SURVEY RESULTS

TOI MAI
Workforce
Development
Council

Summary

Toi Mai Workforce Development Council released the first vocational digital technology workforce development plan, *Te Wao Toi Whānui (the Toi Whānui Forest)* in 2024 and also released a report *Tāngata Whaikaha in Tech* in January 2025.
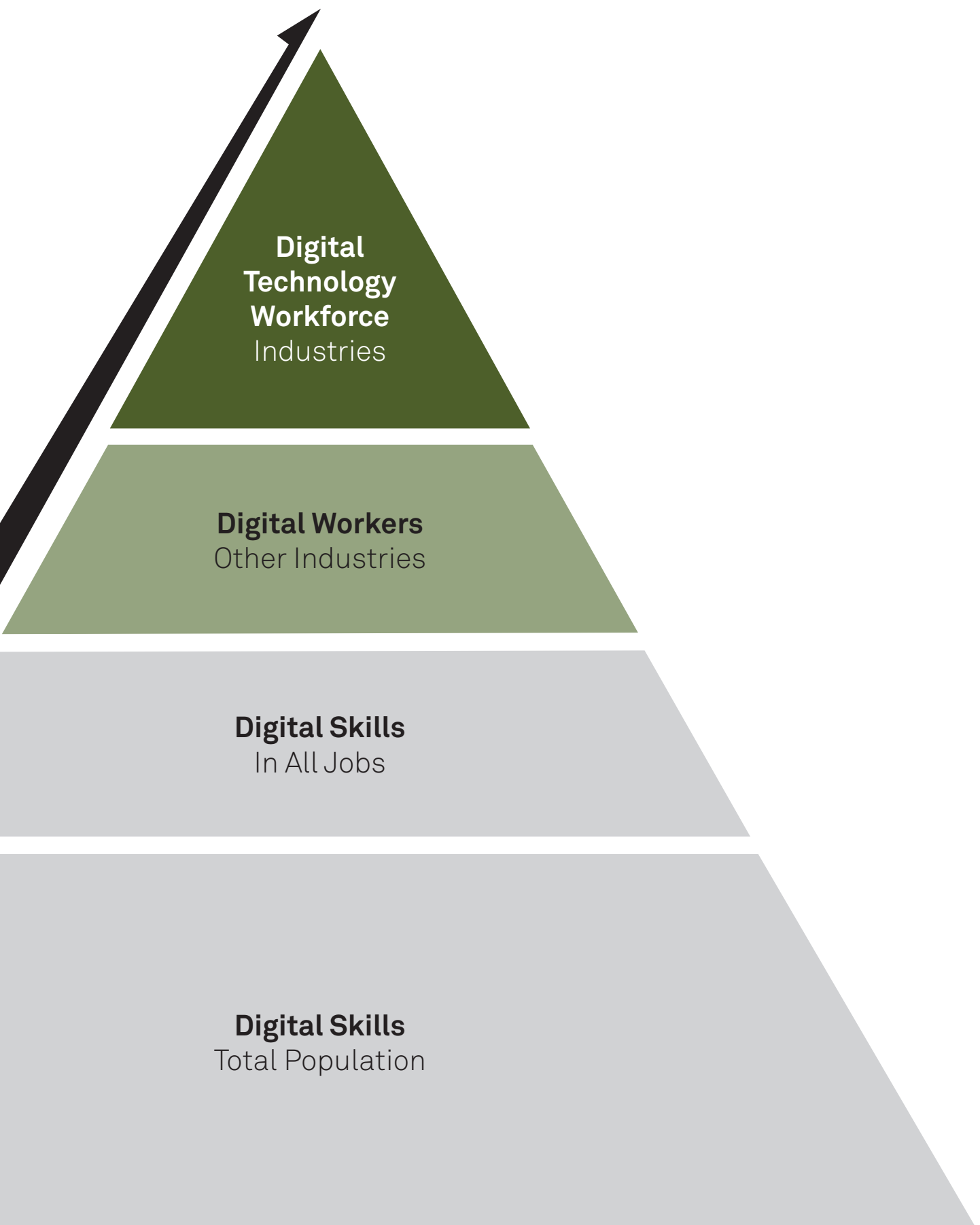
In conjunction with NZTech, Toi Mai also ran a digital skills survey which provided insights for NZTech's third edition of the digital skills report, *Digital Skills Aotearoa: Digital Skills Tomorrow, Today* published in 2023.

This year (2025) Toi Mai Workforce Development Council ran a digital skills survey again. In total, there were 67 responses ranging from individuals and organisations, including SMEs through to large multinational companies with a presence in New Zealand, and government organisations.

This document provides high level results from the survey, with a focus on skills, as well as training information provided by the Tertiary Education Commission and StatsNZ, and a snapshot of information on the sector provided by NZTech.

The survey concentrated on digital technology workers and teams within companies and adheres to the definition of digital technology workers as outlined by NZTech in *Digital Skills Aotearoa: Digital Skills Tomorrow Today.*

Digital Skills

**Digital
Technology
Workforce**
Industries

Digital Workers
Other Industries

Digital Skills
In All Jobs

Digital Skills
Total Population

Aotearoa New Zealand's tech sector is growing, creating jobs and valuable exports.

New Zealand's tech sector had

24,012

firms in 2024

StatsNZ, 2025

New Zealand's startups raised

$467m

in funding in 2024

StatsNZ, 2025

New Zealand's tech sector exported

$11.4b

worth of goods and services in 2024

StatsNZ, 2025

New Zealand's tech sector invested

$1.2b

in R&D in 2024

StatsNZ, 2025

Softwares exports grew

20%

in 2024

StatsNZ, 2025

New Zealand's tech sector employed

119,520

people in 2024

StatsNZ, 2025

Tech was New Zealand's

3rd

largest export in 2024 after Dairy ($20.5b) and Tourism ($15.8b)

StatsNZ, 2025

Auckland's tech sector employed

52%

of all IT workers, 62,504 people in 2024

StatsNZ, 2025

New Zealand's tech sector contributed

$24b

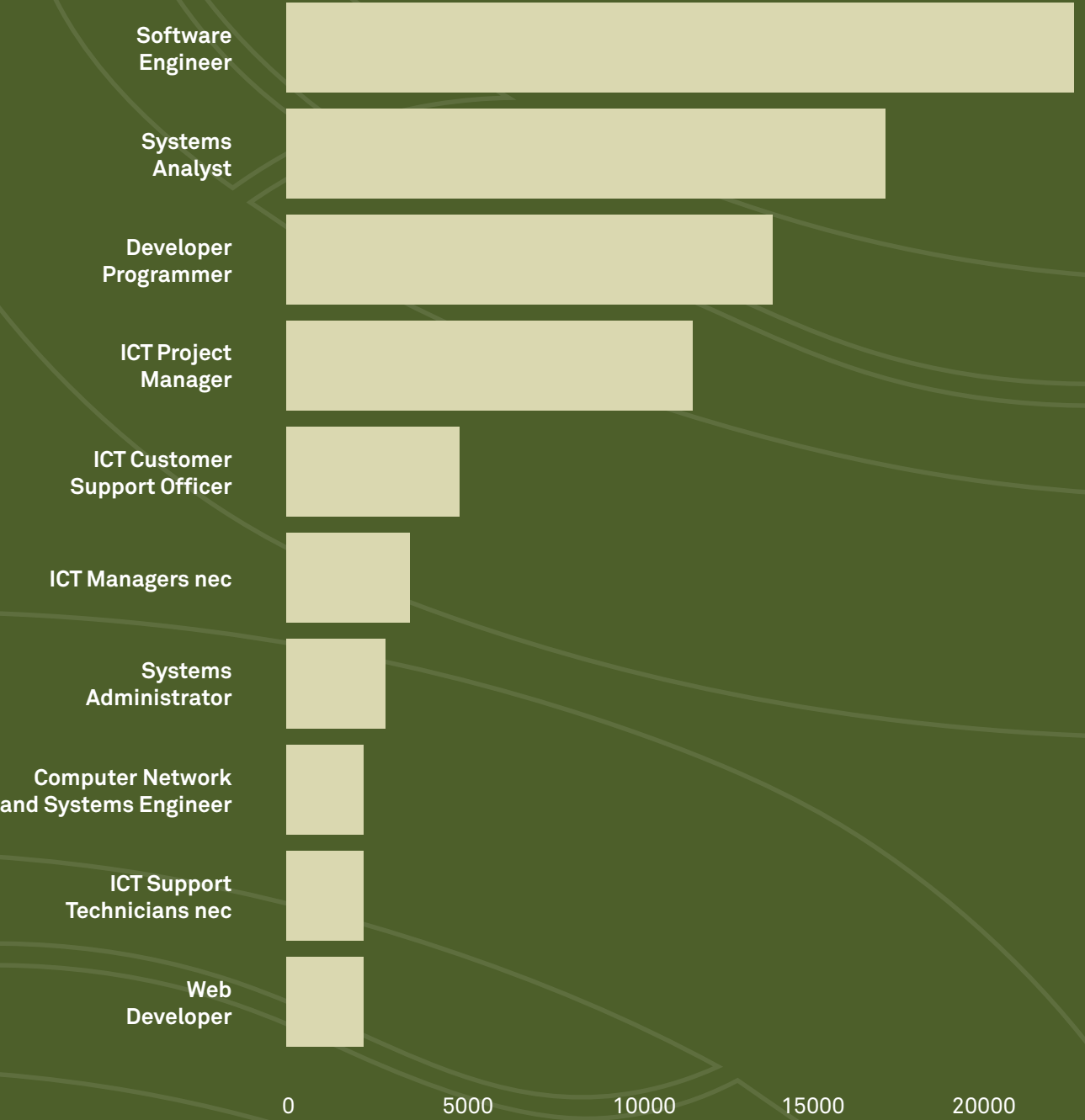to GDP in 2024

StatsNZ, 2025

New Zealand's tech sector took

729

tech visas in 2024

Immigration NZ, 2025

Data source: NZTech

Top 10 IT Occupations in the Census 2023

| Occupation	Value
Software Engineer	~22500
Systems Analyst	~17000
Developer Programmer	~14000
ICT Project Manager	~11500
ICT Customer Support Officer	~4800
ICT Managers nec	~3300
Systems Administrator	~2700
Computer Network and Systems Engineer	~2100
ICT Support Technicians nec	~2100
Web Developer	~2000

0   5000   10000   15000   20000

*nec = not elsewhere classified
Data source: Statistic New Zealand

Training

Overall, participation in tertiary Information Technology training has rebounded from the decline prior to (and bottoming out during) the COVID pandemic.

IT Training Participation Rebounds to Pre-COVID Levels in 2025
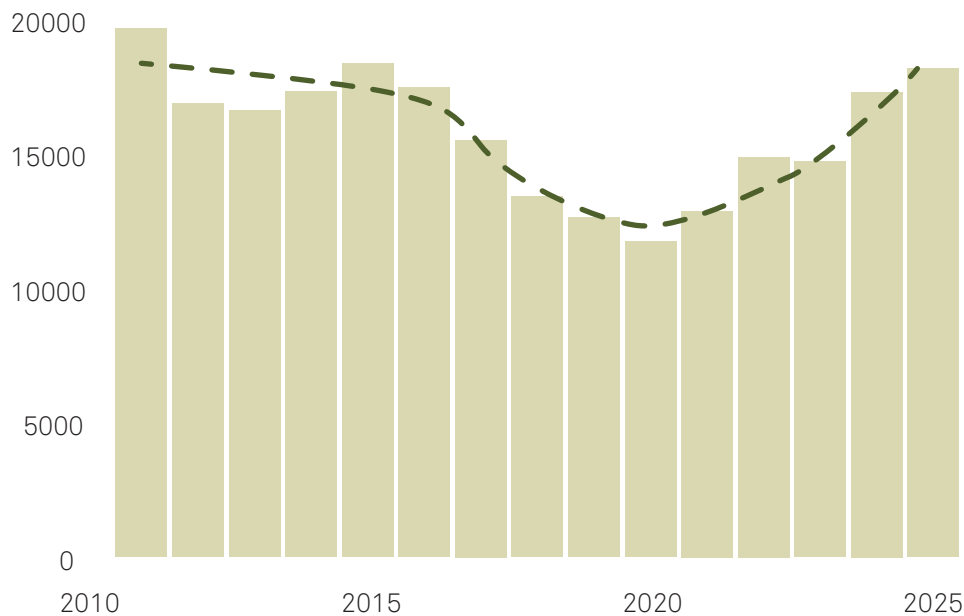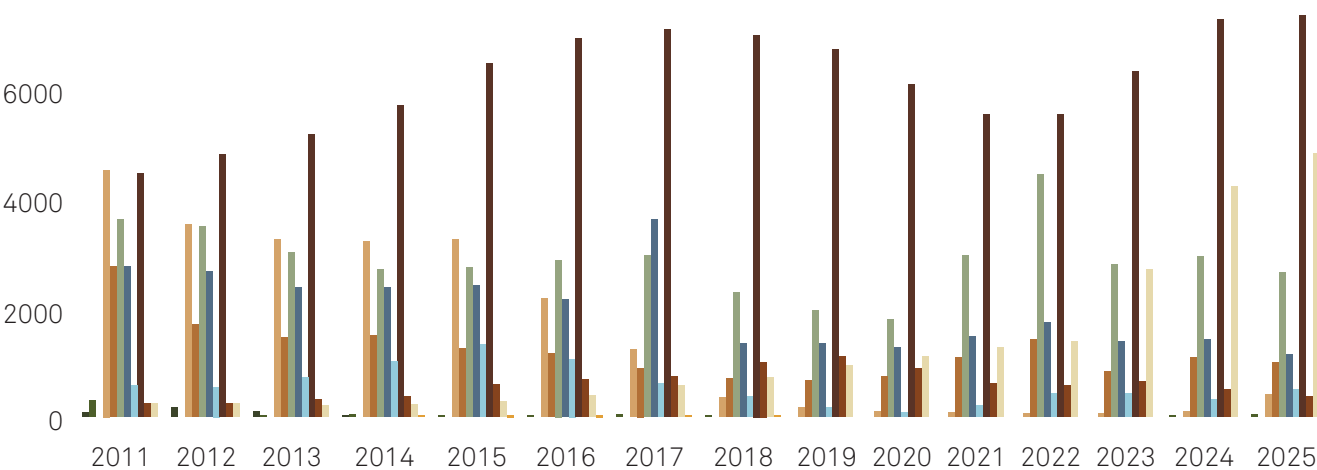

Data source: Tertiary Education Commission

Mimicking the rise of tertiary education IT provision, bachelor and master degrees have increased in popularity; in contrast vocational provision has declined, especially after the increases experienced during the discontinued Targeted Tertiary Apprenticeship Fund (TTAF) in 2021 and 2022 which included vocational IT qualifications.

IT Provision By Reporting Year and NZQF Level

Qualification or programme NZQF level

- No NZQF level
- 1
- 2
- 3
- 4
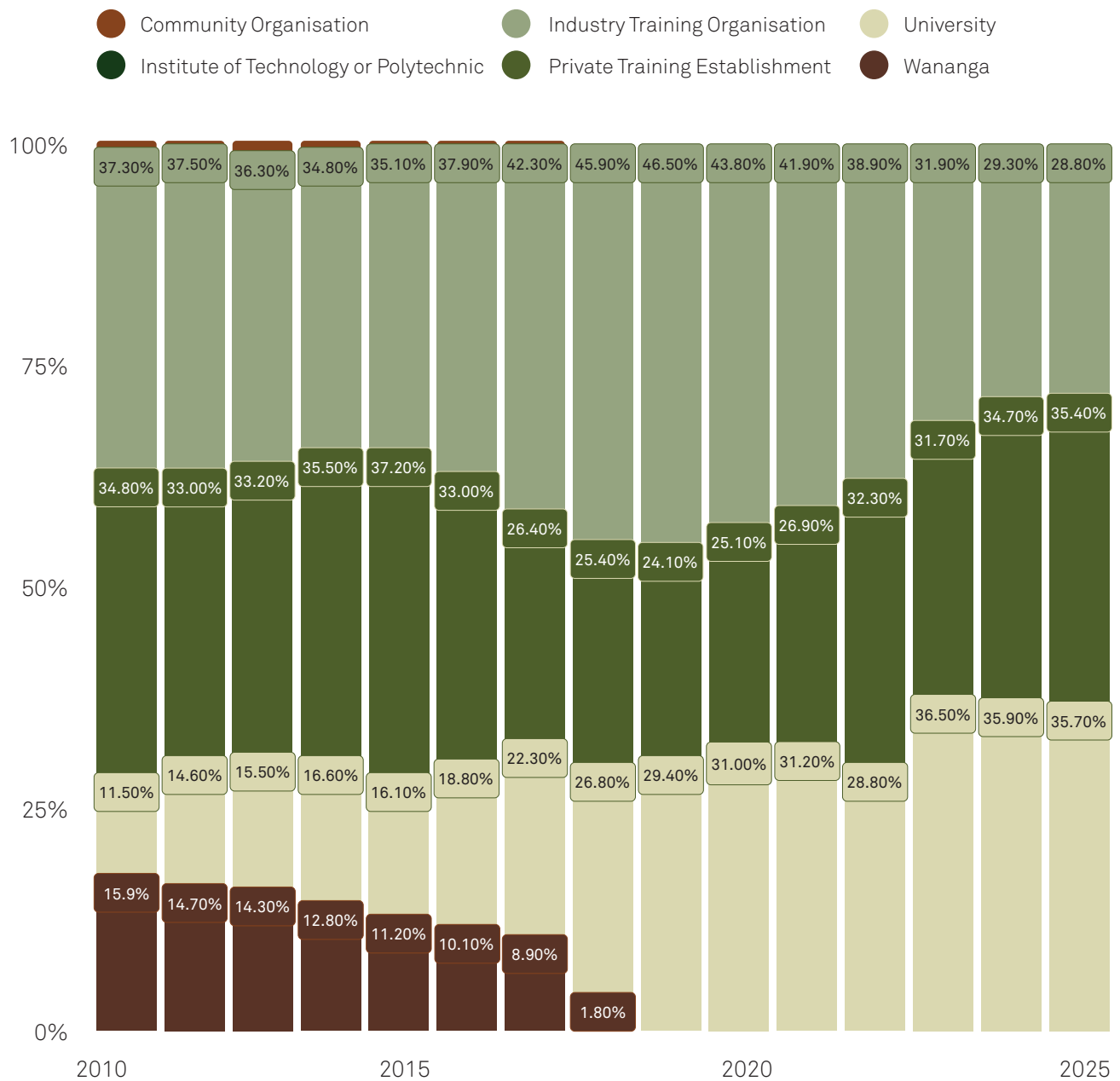- 5
- 6
- 7 (non degree)
- 7 (degree)
- 8
- 9
- 10

Data source: Tertiary Education Commission

Both Private Training Establishments (PTEs) and Universities have grown market share in IT training and the Institutes of Technology and Polytechnic (ITP) sector has experienced gradual decline, from a peak of almost 46% in 2018 to 29% in 2025.

IT Provision By Reporting Year and Provider Type

Provider Type

- ● Community Organisation
- ● Industry Training Organisation
- ● University
- ● Institute of Technology or Polytechnic
- ● Private Training Establishment
- ● Wananga

Data source: Tertiary Education Commission

Digital Skills

The Digital Skills Survey asked a series of questions, focusing on current and future skills needs for digital technology workers and teams in companies. We received 67 responses (4 non-profit / charity, 17 public sector, 46 private sector).

While there has been a decline in employment in the sector (in concert with employment across the entire economy) respondents were generally positive about future recruitment and hiring in the sector over the last 12 months.

There was also a positive outlook for future hiring with over 51% of respondents expecting an increase in hiring for roles in the next year.

Areas such as development and testing, and cloud and infrastructure were among the most in demand areas for future roles.

Are you in the process of recruiting or have you recruited for a digital/tech over the last 12 months?
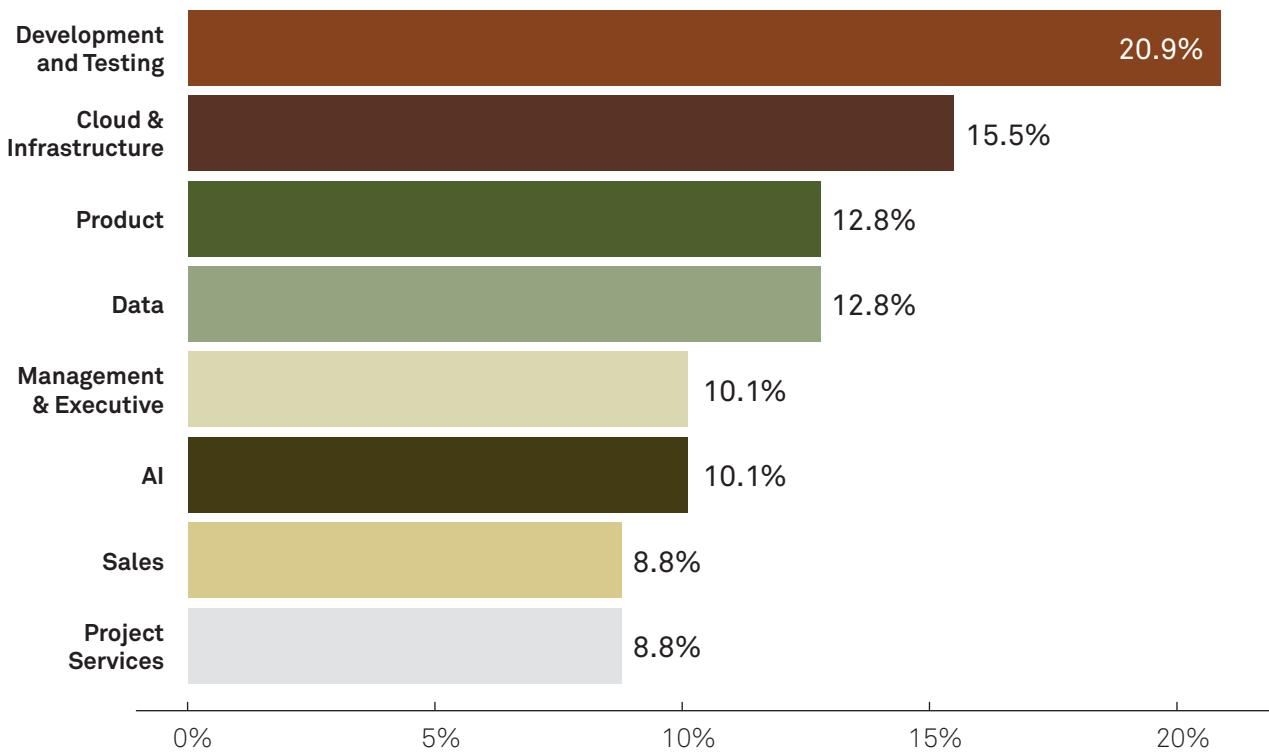

34%

66%
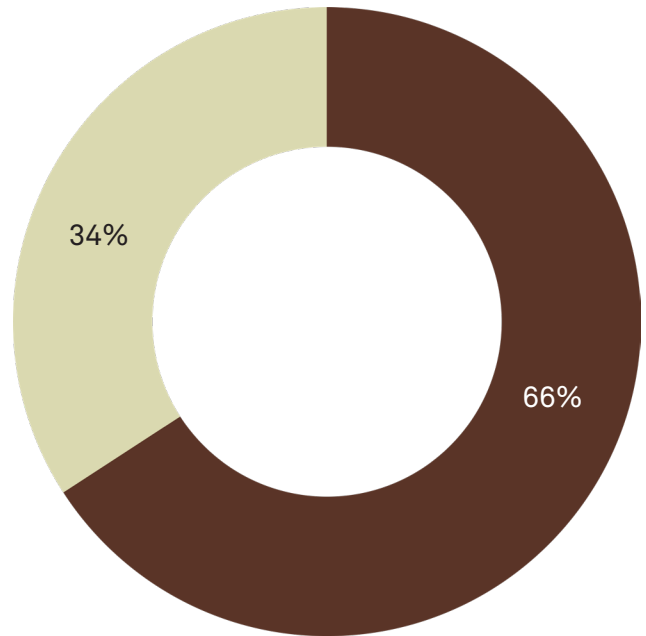
Toi Mai Digital Skills Survey 2025

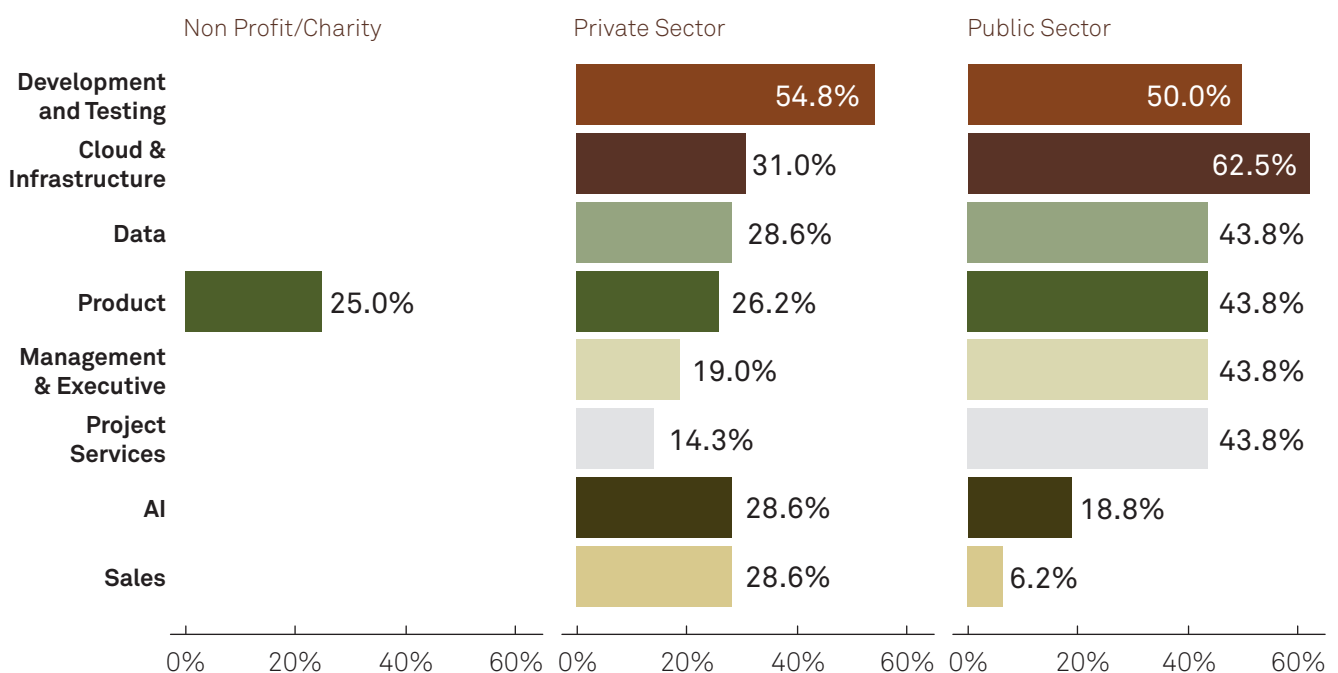**Do you expect roles recruited for to increase or decrease over the next 12 months?**

15%

51%

34%

● Decrease   ● Don't Know   ● Increase
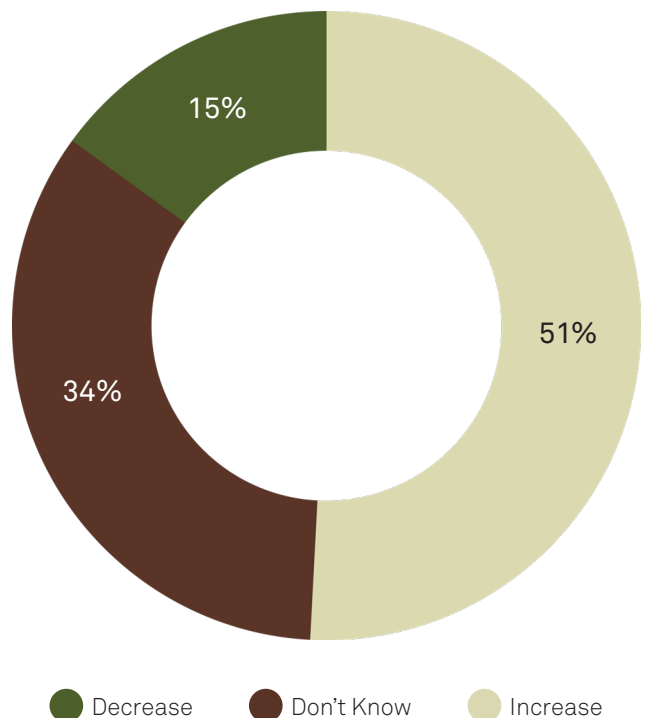
Toi Mai Digital Skills Survey 2025

Which of the following areas are you recruiting roles for, currently or over the last 12 months?

Area	Percentage
Development and Testing	20.9%
Cloud & Infrastructure	15.5%
Product	12.8%
Data	12.8%
Management & Executive	10.1%
AI	10.1%
Sales	8.8%
Project Services	8.8%

Toi Mai Digital Skills Survey 2025

Split into sectors, Development and Testing are in demand for the private and public sectors. Cloud and Infrastructure, in particular, has emerged as a sought after skill area.

Which of the following areas are you recruiting roles for, currently or over the last 12 months?

Area	Non Profit/Charity	Private Sector	Public Sector
Development and Testing		54.8%	50.0%
Cloud & Infrastructure		31.0%	62.5%
Data		28.6%	43.8%
Product	25.0%	26.2%	43.8%
Management & Executive		19.0%	43.8%
Project Services		14.3%	43.8%
AI		28.6%	18.8%
Sales		28.6%	6.2%

Toi Mai Digital Skills Survey 2025

For future software needs, Artificial Intelligence (AI) has become the highest desired skill requirement across both public and private sectors.

Which software development skills and languages will your organisation need most in the next two years?

Skill	Non Profit/Charity	Private Sector	Public Sector
Machine Learning / AI	25%	64.3%	68.8%
Full Stack	50%	52.4%	37.5%
Azure		16.7%	62.5%
SQL/MySQL	50%	21.4%	43.8%
Python		35.7%	37.5%
Javascript		40.5%	25.0%
AWS		31.0%	25.0%
Wordpress	25%		
React	25%	31.0%	18.8%
PHP/Drupal	25%	16.7%	
C#	25%	23.8%	12.5%
.NET		11.9%	25.0%
Unreal		16.7%	
C++		16.7%	6.2%
Java		9.5%	12.5%
Unity		7.1%	
Precision Ag			6.2%
I am not sure		2.4%	6.2%
Pick		2.4%	
Not sure at the moment		2.4%	
Not as applicable for us, I don't think		2.4%	
NextFlow		2.4%	
Microsoft 365		2.4%	
Kotlin, Objective-C		2.4%	
Flutter		2.4%	
AI prompts		2.4%	
Accessibility		2.4%	

Toi Mai Digital Skills Survey 2025

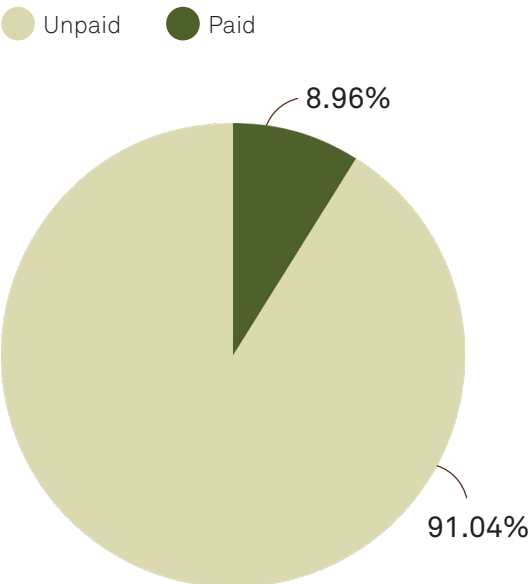# Work-based Learning and Internships

The survey asked a series of questions around work-based learning and internships in the industry. In the vocational digital technology workforce development plan, *Te Wao Toi Whānui*, there was strong desire among industry for more work-based learning opportunities and internships; however survey responses indicated this remains a challenge.

Has your organisation engaged with digital technology interns in the last 12 months?
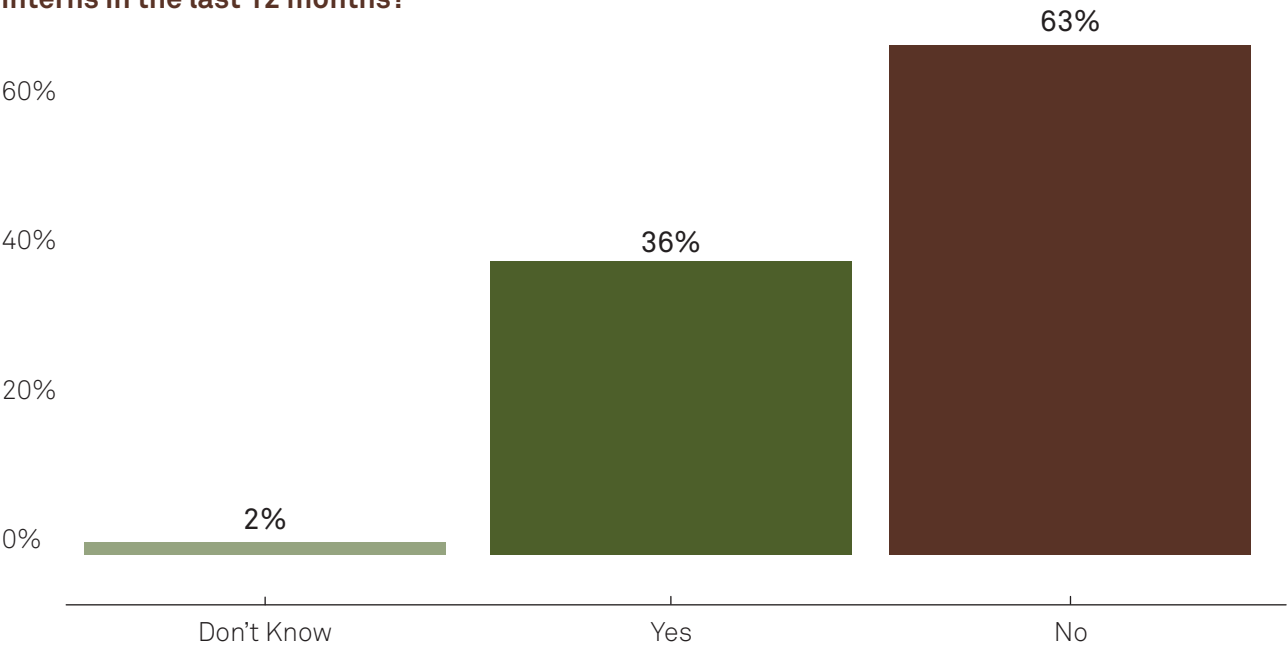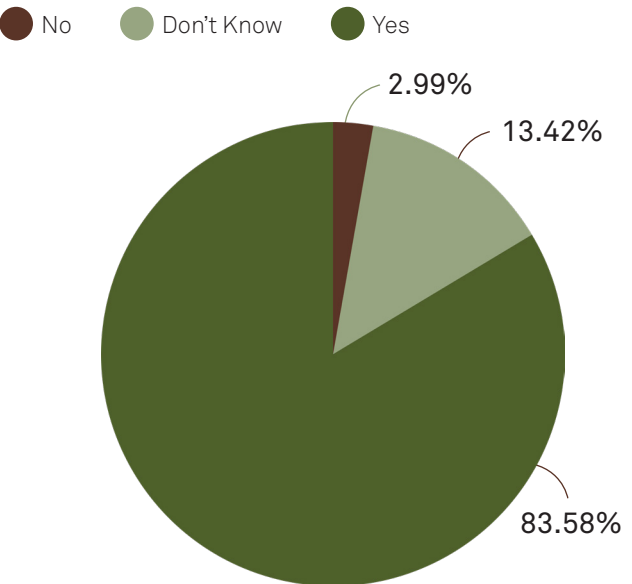

Toi Mai Digital Skills Survey 2025

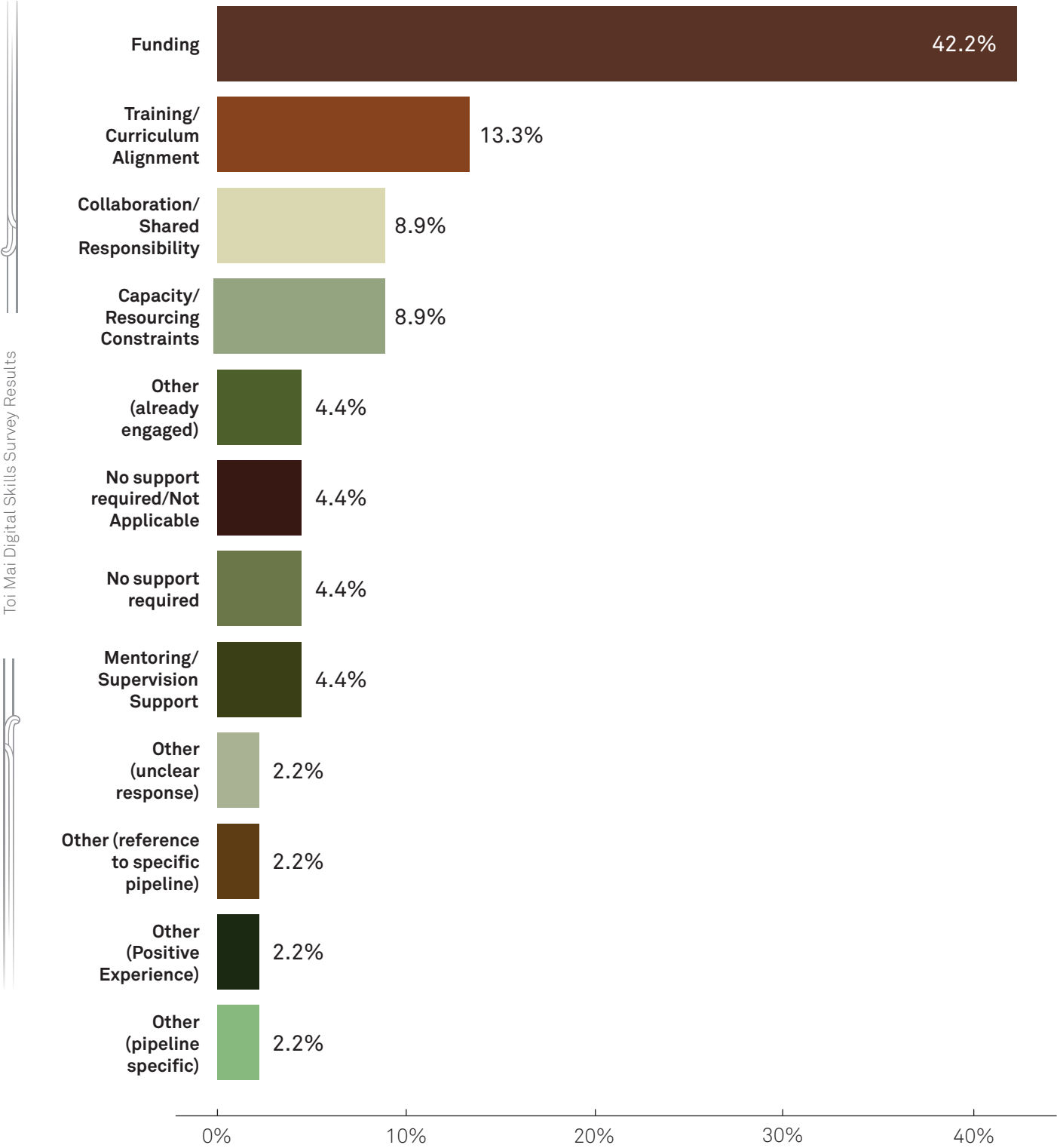91% said interns should be paid while in the workplace.

84% said they would support qualifications that included work integrated learning / work-based learning / digital apprenticeships.

Funding remains the largest factor for
organisations to take on digital apprentices.

**What type of support does your organisation need to take
on a digital apprentice?**

| Category	Percentage
Funding	42.2%
Training/Curriculum Alignment	13.3%
Collaboration/Shared Responsibility	8.9%
Capacity/Resourcing Constraints	8.9%
Other (already engaged)	4.4%
No support required/Not Applicable	4.4%
No support required	4.4%
Mentoring/Supervision Support	4.4%
Other (unclear response)	2.2%
Other (reference to specific pipeline)	2.2%
Other (Positive Experience)	2.2%
Other (pipeline specific)	2.2%

Digital Capacity and SFIA

Over half respondents said digital capability among technology staff was being measured or tracked.

Is digital capability being measured or tracked in your organisation?

Response	Percentage
No	54%
Yes	36%
Don't Know	10%

Toi Mai Digital Skills Survey 2025

0% 20% 40%
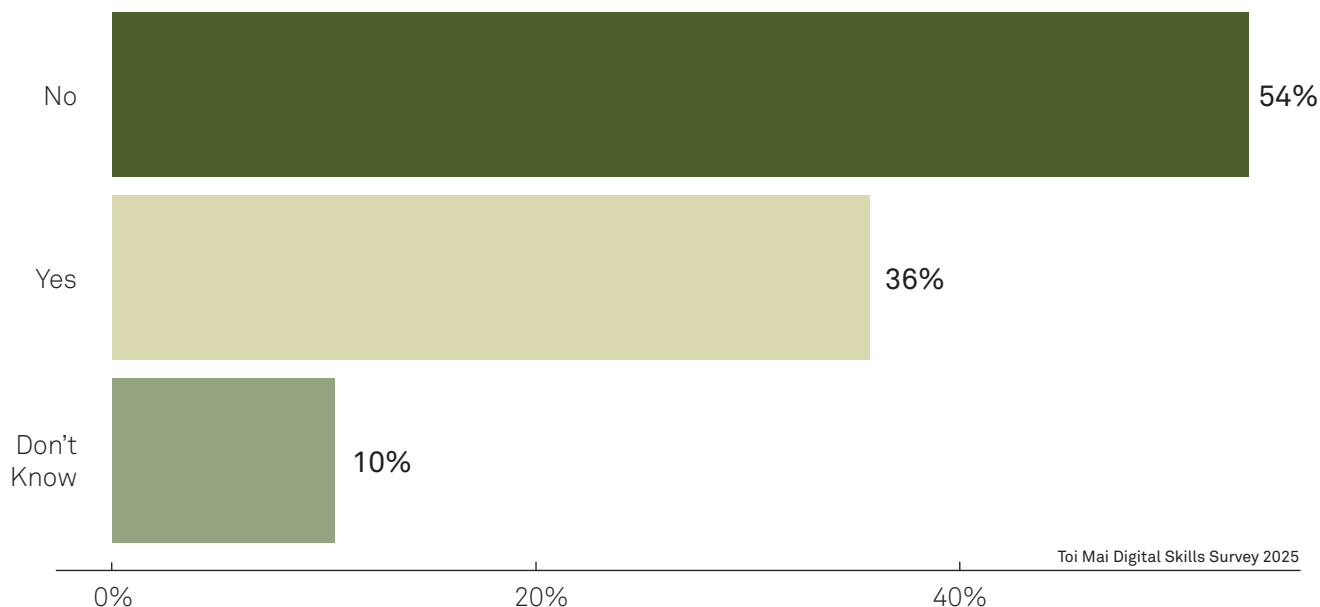
Over 75% of respondents said they were not using any capability frameworks in which to measure digital skills (including Skills for the Information Age).

Are you currently using a capability framework for digital skills, such as Skills Framework for the Information Age (SFIA)?

Response	Percentage
No	78%
Yes	22%

0% 20% 40% 60% 80%

Toi Mai Digital Skills Survey 2025

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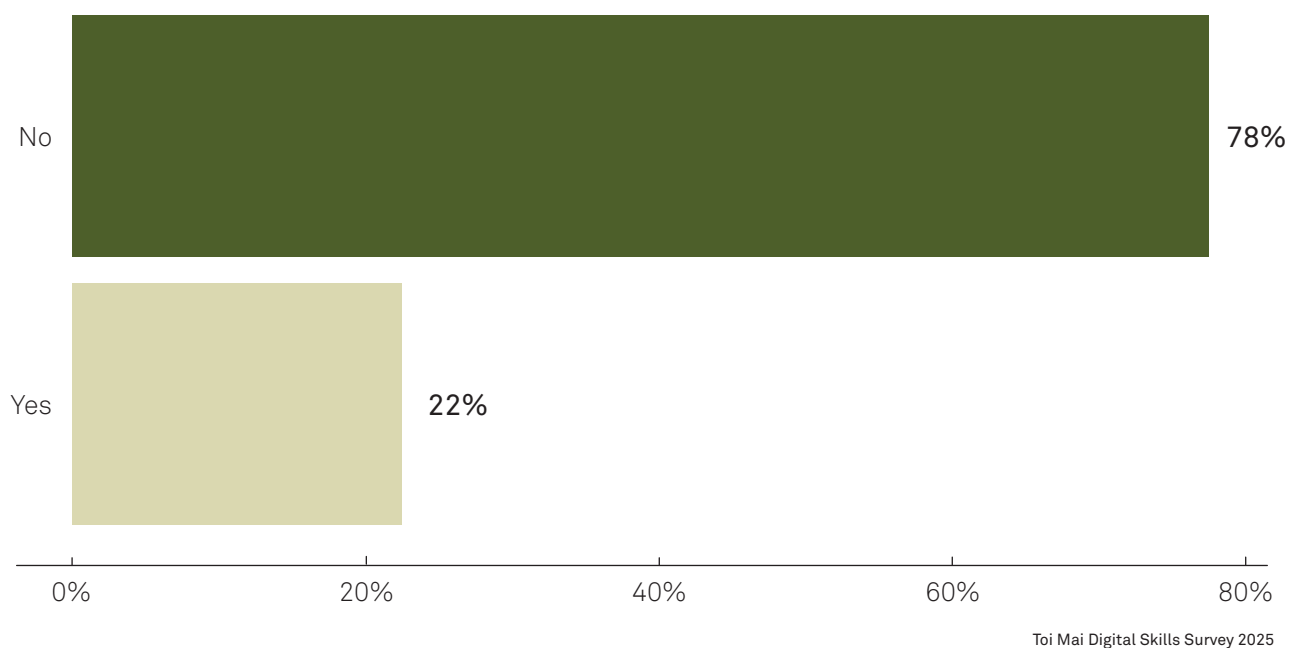
Short term horizon

When comparing responses to organisations that said they had shrunk, grown or remained the same size over the last two years, there was a notable shift to projected growth for organisations over the next two years.

Perceived Organisational Trend: Past vs Future

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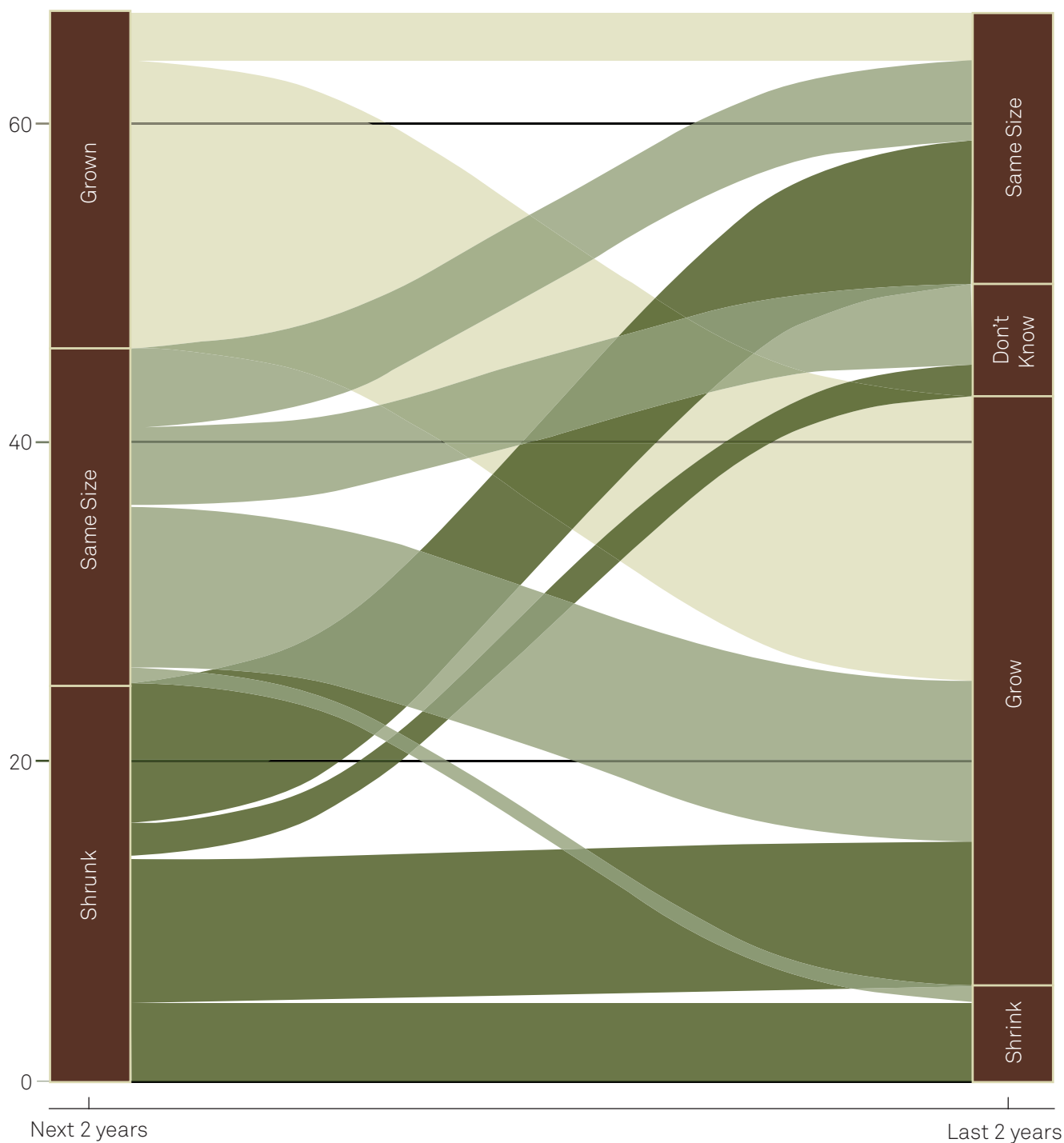
Coda

Once Toi Mai Workforce Development Council is disestablished at the end of 2025, qualification development and assurance, as well as advice to TEC, will shift to the new Electrotechnology and Information Technology (ETIT) Industry Skills Board. ETIT will also become the voice of industry for the vocational Information Technology sector.

Information, such as the Digital Skills survey, will be handed to ETIT and will help form the direction of future qualification development in the Information Technology space.