



RINGA HORA
Services
Workforce Development Council

Investment Advice

April 2023

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Executive summary

The Services sector is central to life in Aotearoa, making up a third of the workforce and half of the businesses in New Zealand, with two out of every three people having worked in the industry at some point in their careers. As such, the sector represents a diverse range of people, including our Māori, Pacific and Tāngata Whaikaha | Disabled People workers.

The Services sector workforce is dynamic and mobile, with people moving quickly and easily between jobs, and although heavily impacted by COVID-19, the sector and its workforce has proven its resilience. This resilience has been critical in light of recent weather events across the motu and increasing economic pressures.

However, despite the Services sector making up a third of the workforce and half of the businesses in New Zealand, the Services sector only makes up one-sixth of vocational education provision. As such, there is an increasing role for Ringa Hora to support the Services sector in achieving long-term, transformational change to tackle current and future skill shortages, adjust to the future of work by promoting a strong skills base, and ensure the right training is available at the right time. Therefore, we recommend to TEC to give effect to the proposed pan-industry investment priorities:

- promote transferable foundation and core skills
- support the alignment of qualifications
- promote qualifications and credentials tailored to their preferred learning environments

- promote career pathways and career changes
- promote transitions into work
- support flexible, tailored learning options
- support equity outcomes for underserved learners.

More information on the proposed investment priorities can be found within the report, as well as industry-specific advice and detailed recommendations on programmes, delivery, regional responses, and qualification priorities where relevant.

This advice has been developed using industry insights from our engagement activities, administrative data and research commissioned by Ringa Hora. Ringa Hora is committed to continuously improving our database and building strong industry, iwi, and hapū relationships to support future investment advice and workforce development planning, including those groups where data may be less readily available currently.

Introduction and Background

Ka mua, ka muri. Walking backwards into the future.

We believe that the future of the Services sector is exciting; it's a future with people at the centre and endless possibilities for people to choose their own paths. It's a future in which industry and businesses can thrive and are empowered to determine their own direction. It's a future where vocational education is equitably accessible to everyone across Aotearoa, from our largest cities to our smallest towns. It's a future where people gain skills for life, wherever it takes them. As we prepare for the future, it's also important to acknowledge that the Services sector faces constant pressure due to the ongoing impact of COVID-19, chronic skills and labour shortages across all industries, and increasing economic and social uncertainties.

The recent weather events across Aotearoa and inflationary pressures are causing further disruptions to the sector. As businesses across the country focus on rebuilding and other immediate issues, there is an increasing role for Ringa Hora to better complement industry activities with medium to long-term skills initiatives.

Our investment advice is a key lever for Ringa Hora to support the Services sector in achieving this long-term, transformational change in the vocational education system.

Our Investment Advice

Ringa Hora has a statutory role in providing investment advice to the Tertiary Education Commission (TEC). This report represents our investment priorities for the 2024 funding year.

The priorities in this investment advice have been identified through internal development using industry insights from our engagement activities, administrative data and research commissioned by Ringa Hora. We have tested the concepts proposed with the industry where possible through industry engagement hui and partnerships.

This advice has been guided by the following:

- the desire to see transformational change
- the potential to impact immediate or long-standing change
- the degree to which investment is possible and achievable for providers.

We acknowledge that some groups are not as well covered in our advice, such as Tāngata Whaikaha | Disabled People, LGBTIQ+ communities, migrant communities, refugee communities and some specific industry groupings. Ringa Hora is committed to continuously strengthen industry insights to support future investment advice and workforce development planning. In addition, Ringa Hora will continue to build strong industry, iwi, and hapū relationships to help test and collaborate on these priorities. We will provide TEC with these insights as they emerge beyond the annual investment rounds.

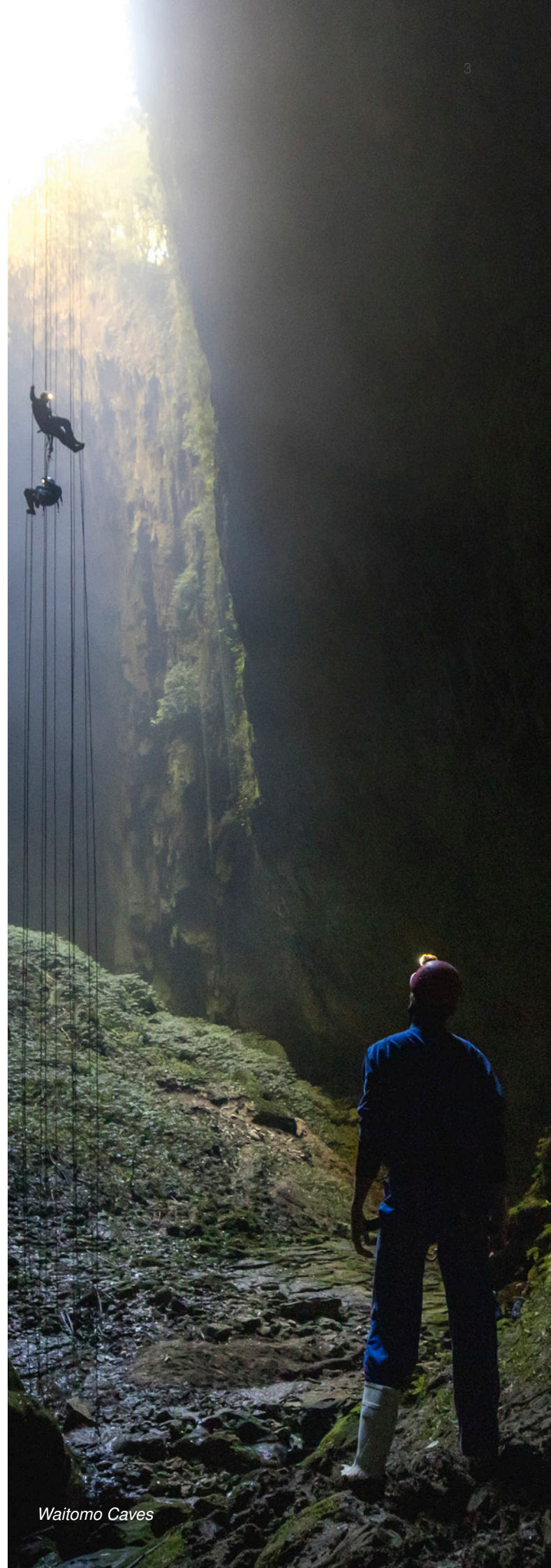
We have recommended to TEC to give effect to proposed investment priorities where we have accumulated sufficient evidence. These recommendations on the investment priorities are formed based on available data and estimates. Equally, we have signalled areas where there are gaps in our understanding – which we will continue to work with industry representatives to populate. Refer to Annex 1 for the detailed methodology.

Our environment

The Services sector faces a series of challenges that will influence the industry's decision-making in the next year. Some of these factors include the recent natural disasters, the ongoing impact of COVID-19, inflationary pressures, changes in technology, legislation and regulatory practice, and chronic international labour shortages in specific fields.

At a regional level, it is important to note the impact of recent weather events in regions such as Te Tai Tokerau, Tāmaki Makaurau, Te Tai Rāwhiti, Hawke's Bay, and Waikato, which will require significant support to aid the short-term recovery response. In the medium to long term, there is a need to support the rebuilding process, redeploy the workforce to meet labour needs, build the resilience of the labour market and businesses, and build the resilience of the labour market, businesses, iwi and Māori.

In terms of the regulatory environment, changes such as the Fair Pay agreements and Immigration rebalance, Reform of Vocational Education, and Industry Transformation Plans will have varying impacts on the future workforce for the Services sector and in specific Services sector industries.



Waitomo Caves

Our context

Ringa Hora Services Workforce Development Council is one of six Workforce Development Councils (WDCs), established in 2021 as part of the Reform of Vocational Education (RoVE), with a mandate to help drive transformational change in the vocational education system.

Ringa Hora derives its name from the following context: 'Ringa' means 'Hands' and 'Hora' means 'Spread Out.' 'Ringa Hora' therefore symbolises the upturned, outspread hands of the Services sector, representing the manaakitanga and hospitality of our workforce and industries.

Ringa Hora serves a large number of people in a wide range of businesses within the Services sector. These people do everything from working in airports, selling houses, and cleaning buildings to serving front of house in a restaurant. Ringa Hora has created ten industry groupings based on the types of things businesses focus on and the types of roles people play. While these groups are different, they all have people at their heart. These industry groupings include:



Our strategic direction

Our role is to channel and amplify the voice of the Services sector within the vocational education system by providing investment advice to TEC, as well as setting standards, developing qualifications, and helping shape the vocational education curriculum. We partner with industry, highlight their needs and advocate to affect system changes. Our aim is to support Service industries to tackle current and future skill shortages, adjust to the future of work, build a strong skills base, and have the right training available at the right time.

The organisation has four main priorities:

- giving effect to Te Tiriti o Waitangi and supporting Māori-Crown relationships
- enabling a vocational education system that is led by industry priorities and insights
- contributing to an excellent vocational education system that offers fit-for-purpose programmes, standards, and qualifications
- being regionally responsive by ensuring that vocational education is accessible and relevant for the regions of Aotearoa.

Giving effect to Te Tiriti o Waitangi

Ringa Hora aims to support Māori to succeed as Māori by upholding Te Tiriti o Waitangi. We are doing this through:

- **Embedding Te Reo Māori.** Ensure Te Reo Māori is appropriately embedded into Ringa Hora's operation.
- **Partnerships with hapū, iwi and Māori Organisations.** Build and maintain genuine partnerships with hapū, iwi, and Māori organisations so that Māori voice is authentically considered and applied in organisational priorities.
- **Mātauranga Māori Provision.** Develop and implement approaches that give authentic consideration to the application of Mātauranga Māori within education product design and quality assurance processes.
- **Mātauranga Māori Provision.** Develop and implement approaches that give authentic consideration to the application of Mātauranga Māori within education product design Māori.
- **Embedded Mātauranga Māori/Cultural Capability.** Embed Māori culture capability within the organisation to address te ao Māori complexities regarding equity, Māori stakeholder engagement and the application of Māori voice within organisational priorities.

Services sector in Aotearoa

The sector currently has **946,000** people, over a third of the New Zealand workforce.



This number could be as **large as 1.17 million**, including non-conventional workers, such as part-time, casual, temporary, and seasonal workers. These workers play a crucial role in the economy and are represented by young persons, women, and Māori.

The Services sector is a core part of the New Zealand economy.



The sector has over 306,000 businesses, representing approximately half of all businesses in the country.



The Services sector contributes approximately \$109 Billion per year to New Zealand's Gross Domestic Product, about 30% of the country's total economic activity.



Most businesses within the Services sector are small businesses employing, on average, three people.

Our people are our biggest taonga. With an estimated two out of every three people working in the industry at some point in their careers, we represent a diverse range of people, and this includes our Māori, Pacific and Tāngata Whaikaha | Disabled People workers.



- Māori represent 14% of the total Services sector workforce. There is an estimated 130,000 Māori in the Services sector.
- The Services sector also includes many Māori-owned businesses, with roughly 7,000 out of the 370,000 businesses in the sector being owned by Māori.
- Pacific peoples make up 8% (76,000) of the total 946,000 workers.
- Asian workers represent approximately 24% (227,000) of the Services sector workforce.
- Rangatahi (15–24-year-olds) represent more than 19% of the Services sector workforce. This number varies significantly between each Service industry.

The backgrounds of those who enter the Services sector is diverse. Many who join the Services sector will be entering the workforce for the first time, others might be making career shifts from outside or within the Services sector, and some may stay within the sector. Most of the workforce can move quickly and easily between jobs.



The most significant percentage of new entrants into the industry come from industry changers rather than tertiary or secondary education or otherwise, except for Hospitality Services, where the highest proportion comes from overseas.



Our workforce is dynamic and mobile, and many seem to move quickly and easily between jobs. However, the overall size of the Services sector workforce remains relatively stable, and this diverse mix of people and skills helps to strengthen the sector.

1 in 3

There is a yearly turnover of approximately 1 in 3 across the core Services sector workforce.

38%

Notably, 38% of workers who change industries continue to work within the Services sector.

80%

In 2020, roughly 80% of the people who left the sector transitioned into another industry. A similar proportion of people managed to transition into a new job within three months.

The workforce has proven its resilience and ability to pivot from COVID-19. This is a critical characteristic that will support the sector in recovering from current and future shocks, such as natural disasters and economic upheaval.



In 2021, the Services sector saw a drop in its workforce size for the first time since 2010. This was a drop of 0.9% to 925,000 workers. However, in 2022, there was a strong rebound with a workforce increase of 2% (20,000 workers) to approximately 945,000 workers.



GDP has also shown a strong recovery with a 9% increase in 2022 after a 1% drop in 2021.



The COVID-19 pandemic temporarily impacted workforce churn, with a slowdown in the number of workers entering (40,000 fewer) and leaving (13,000 fewer) the sector.



Vocational education in the Services industry

How does vocational education impact the services industry

Vocational education plays a critical role in addressing the Services sector's challenges. By providing training and upskilling opportunities, vocational education can help bridge the gap between the supply of workers and the demand for skills. This is particularly important in light of the COVID-19 pandemic, which has led to significant changes in consumer behaviour and the types of services in demand.

Make-up and composition of vocational education for the Services sector

In 2022, 49,000 ākonga were studying towards Services sector qualifications. Of these ākonga and qualifications:

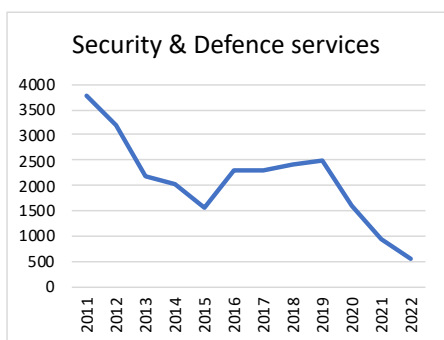
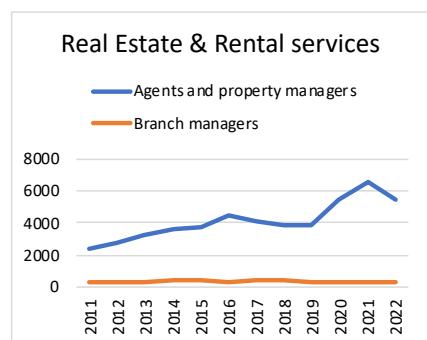
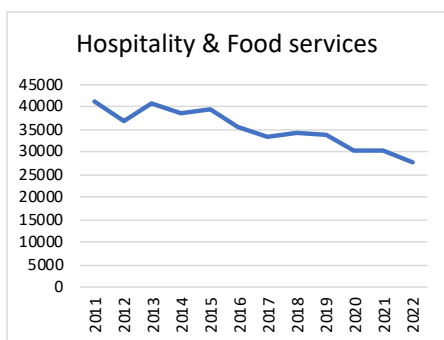
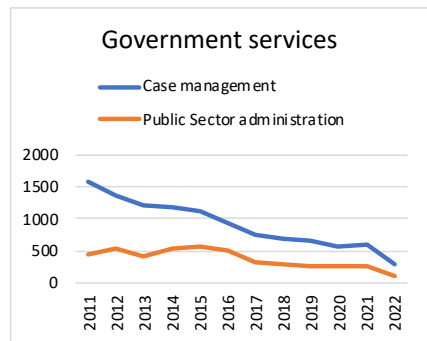
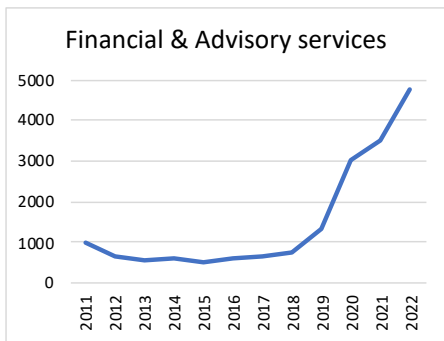
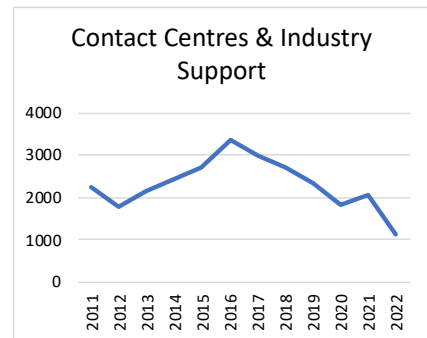
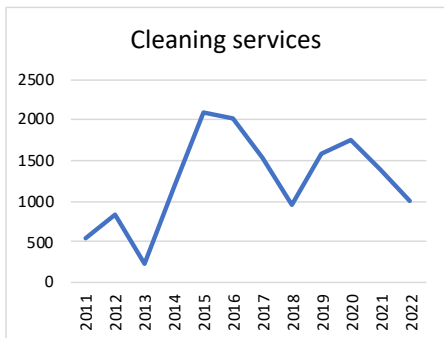
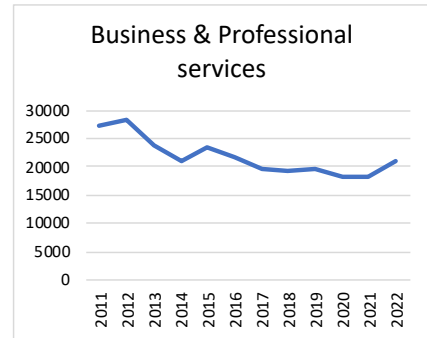
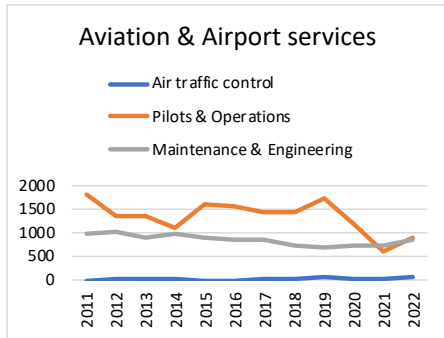
- Business and management courses are our largest provision, with 15,500 learners, followed by cookery and real estate.
- While our total number of learners has remained steady over the past five years, our mix of provisions has changed. We have seen significant growth in industries where new regulations have required training to become licensed, such as banking and finance, and property management. In contrast, there have been notable decreases in the retail trade and security services provision.
- COVID-19 significantly impacted tourism studies, with the number of learners studying towards a tourism qualification halving since 2019.

Changing delivery options for ākonga

Since COVID-19, there has been a drop in the volume of delivery, while the number of learners has remained steady. This may be indicative of the preference of learners and employers towards shorter courses and micro-credentials to fill skill needs quickly.

Online learning has become increasingly important for the Services sector throughout COVID-19, with an increase from 6,600 extramural learners in 2019 to 17,000 in 2022. Business management, real estate, office administration, and banking and finance provision account for most of this increase.

Number of Learners per Services sector industry



Utilisation of vocational education in the Services sector

Despite making up a third of the workforce and half of the businesses in New Zealand, the Services sector only contributes to one-sixth of vocational education provision. This could reflect the relatively low entry thresholds and opportunities to upskill the sector on the job.

Regulations and licensing requirements placed on some service industries have resulted in greater uptake in vocational education, granting the opportunity to upskill the workforce and improve practices. A recent example of this is the financial and advisory industry. The industry has increased enrolments in the New Zealand Certificate in Financial Services from under 800 in 2018 to 4,800 in 2022. The Property Management industry is now also undergoing similar requirements. In the Real Estate industry, regulations have seen the number of qualified professionals increase together with industry growth from under 1,000 in 2003 to over 10,000 in 2022.

There is a growing reliance on migrant workers to fill the Services sector skill needs. The number of Services sector workers with work visas has more than doubled in the last decade (48,000 in 2010 to 128,000 in 2019). Historically, industries with little to no reliance on migrant workers are now turning to migration to fill skills needs. For example, the Aviation industry had fewer than 30 migrant workers in 2010 compared to over 300 in 2019. COVID-19 and subsequent recovery exposed this as a vulnerability for the sector, with migrant labour sources cut off. Growth in workers with work visas stalled, and the supply of working holidays was cut off, leaving a shortfall of around 40,000 workers in 2021¹.

Transition of skills from education to the workforce

Post-study outcomes data estimates that 67% of all vocational graduates in the Services sector are in full-time employment the year post-study. 20% choose to continue their education and transition into higher-level studies. The median income for these Services sector graduates shows steady progression, increasing from \$51,000 in the year after graduation to \$63,000 nine years post-study.

There are some significant differences in the employment outcomes of graduates between services industries. For example, graduates in the finance and advisory industry tend to be older with 40% being over 40 years of age and likely having prior work experience in the field. On the other hand, graduates in the tourism and travel industry tend to be younger, with 70% being under 25 and having limited work experience. These differences in the demographics of the students may explain some of the variation in employment outcomes within the Services sector.

¹ Scarlatti, Ringa Hora Core workforce, 2022: <https://www.sweetanalytics.co.nz/portals/wdc-dashboard-ringa-hora/>

Alignment of qualifications and micro-credentials

We also recognise the shift in the qualifications space. We have heard from industry that the appetite for foundational and core skills is increasing. There is a growing recognition of the common skill and experience requirements for people starting out in the Services sector, as well as an acknowledgement of the current career pathways that see people engaged in similar learning for credit towards different qualifications.

We know that people move between industries in the Services sector and want portable credentials that tell the story about their skills, competencies, knowledge and experience. As such, we support the need for short, sharp, stackable credentials which will improve work readiness and transience.

We currently have 30 existing entry-level Services credentials (Level 2 and 3) that share similar outcomes. Ringa Hora is currently developing a new Future of Services Sector skills qualification and/or credential to be introduced in 2024 which will bring together multiple entry-level qualifications into a consolidated qualification and/or credential that can be utilised across industries. This qualification and/or credential will give greater assurance to the consistency of skills in businesses and create clearer career options for employee growth and development.



Challenges and opportunities for Ringa Hora and the Services sector

This section outlines challenges and opportunities within the vocational education system that the Services sector faces, including:

- identified gaps in strategies/plans/knowledge at a sector level
- anticipated changes in labour market demand for skills over the short to medium term
- identified gaps in the network of training provision within regions and mismatches in supply and demand for training.

Services sector challenges

National challenges

At a national level, pan-sector research suggest that New Zealand's need for workers could outstrip supply by a quarter of a million people as of 2048². This trend is likely to worsen with an aging population. The food, hospitality and personal services industry has been highlighted as having the third largest gap between those entering and those exiting the industry³.

The labour and skills shortages are further compounded for the Services sector as many of the businesses in the Services sector had experienced huge uncertainties in its operating environment driven from COVID-19 and the recent natural disasters. For many businesses, particularly the small to medium enterprises, they have not only lost a significant portion of the existing workforce, they are also being required to pivot their operations differently to respond to the rapidly changing customer demands.



Raglan Roast

² BusinessNZ, February 2023: <https://businessnz.org.nz/wp-content/uploads/2023/03/updated-11am-The-future-of-workforce-supply-Sense-Partners-PDF.pdf>

³ Statistics New Zealand, Sense Partners



Regional challenges

At a regional level, the impact of recent weather events has significantly affected regions such as Te Tai Tokerau, Tāmaki Makaurau, Te Tai Rāwhiti, Hawke's Bay, and Waikato. These areas will require significant support to aid the short-term recovery response.

In the medium to long term, there is a need to support the rebuilding process, redeploy the workforce to meet labour needs, build the resilience of the labour market and businesses, and limit the impact on priority labour market groups, iwi, and Māori.

Unanticipated future shocks, economic upheaval, and climate change are also a growing concern as sustainability becomes increasingly important for both consumers and the industry as a whole.

In addition, with a growing demand for services, the workforce is struggling to keep up, particularly in the tourism and travel industries in regions such as Rotorua and Central Otago, where the number of visitors and tourists has grown post-COVID-19.



Te Tākinga Marae, Rotorua

Meeting the needs of diverse ākonga

The tertiary education system is responsible for reducing barriers for Māori, Pacific People, and Tāngata Whaikaha. There is evidence that embracing and celebrating diversity makes businesses more attractive to potential kaimahi and customers and creates economic and social benefits for employers, the workforce, and the wider community⁴. Ringa Hora encourages investment that addresses current gaps and seizes opportunities for underserved or underrepresented groups.

Māori in the Services sector

With an estimated 130,000 full-time Māori workers and a growing number of young Māori who have been through a kaupapa Māori education, there is a push for further embedding te ao Māori values in the Services sector.

Despite the growing presence of Māori in the Services sector, current statistics suggest that Māori within the sector are more likely to be employed in lower-wage roles. There is an urgent need to forge more tangible career pathways and lift the proportion of Māori in leadership roles and higher-wage roles to enhance the industry's value proposition domestically and internationally.

Our recent research⁵ has shown that for Māori, the Services sector is important not just because of the levels of employment and business opportunities that it provides but also in terms of the reasons why those opportunities are pursued.

Māori businesses are often te ao Māori and

kaupapa Māori orientated. Recruitment is often relational and trust-based, with employers often hiring whānau and friends first. This is a strength for the Services sector. However, there are limited business supports that are targeted to support these businesses. Whilst smaller businesses were impacted heavily by COVID-19, businesses owned by iwi or larger umbrella companies had more financial insulation.

Specific focus areas for vocational education provision include the need to:

- **Improve foundation & core skills** – creating pathways into technology and digital literacy and *promoting numeracy and literacy* to remove barriers and improve the accessibility of training, education, and work.
- **Promote transitions to work** – supporting more Māori into the workforce through methods like *improved pastoral care*—targeted funding towards training and upskilling Māori. Apprenticeships seem to be a popular model for the sector.
- **Promote Māori leadership** – supporting more Māori into leadership positions. Micro-credentials could support career entry points and improve career pathways.
- **Support Māori businesses** – providing more Māori-specific mentoring, which would help Māori businesses thrive into the future.
- **Build industry value of Mātauranga Māori** – increasing the inclusion and value of Mātauranga Māori within vocational education to improve participation of Māori learners and acknowledgement of te ao Māori skills and knowledge systems.

⁴ Why Diversity - DiversityWorks 2022: <https://diversityworks.nz.org.nz/why-diversity/>

⁵ What makes the Services sector resilient research 2022: <https://www.ringahora.nz/latest-news/explore-our-latest-research-what-makes-the-services-sector-resilient/>



Pacific in the Services sector

COVID-19 heavily impacted Pacific peoples, with many young people leaving school early to work in low-wage jobs as a means of helping support their households. This compromised their career options and further educational opportunities. This is likely to be additionally exacerbated by other issues and potential shocks such as natural disasters, climate change and economic upheaval. In addition, young Pacific people are affected by a growing digital divide, education affordability, and a lack of culturally receptive support in many workplaces.

Many industries have expressed an interest in addressing this barrier and upskilling their Pacific workers. However, there is often a lack of understanding of how to approach this. Moreover, where this training is delivered, it is often not tailored to Pacific in its mode and delivery. For example, there is a cost for learners, and access issues such as level of numeracy and literacy, or digital literacy may act as barriers to entry. This issue is particularly pronounced in industries like Security, Defence & Government, where a significant proportion of the workforce comprises Pacific workers and in-person training, such as conflict resolution, is necessary.

Therefore, it is important to create an environment where employers are incentivised to upskill the Pacific workforce and see the value in committing to this. This can be done through:

- **Improving foundation and core skills** – promoting foundational skills such as customer service as well as core skills such as numeracy, literacy, and digital literacy to remove barriers for learners to access training, education, and work.
- **Promoting career pathways** – upskilling those already in the industry and supporting them into leadership and management roles.
- **Promoting transitions to work** – supporting more Pacific into the workforce (for example, through improved pastoral care).

Our recommendations to TEC

The pan-industry and industry-specific advice will provide detailed recommendations on programmes, delivery, regional responses, and qualification priorities where relevant. All recommendations have been developed using available data and assumptions.

Pan-industry advice

As the work environment is changing rapidly, we have been hearing that our sectors want and value people with essential and transferrable skills and are looking for short, sharp, stackable credentials. With over 30 existing entry-level services credentials (see Annex 3) that share similar outcomes, we recommend that resources be directed towards an agreed set of core skills that support work readiness across our broad industries. This could be delivered through a new Future of Services Sector skills credential and/or qualification which will give greater assurance to the consistency of skills in our businesses and create clearer career options for employee growth and development.

There is also a strong desire from the industry for training needs to fit around the context of the industry, both in terms of short, sharp, stackable learning and having multiple modes of delivery to suit the nature of the Services sector, which often does not have standard operating hours.

Although it varies across the different industries within the Services sector, a significant proportion of young workers and small business owners are operating in the sector. Many of them have experienced significant change in the last couple of years and are facing great uncertainties. There is a need for training to better target young workers entering our sector and for provision to better support small businesses to deliver this training to enhance resilience.

As for those already working in the Services sector, having clear career pathways is key to ongoing development. In addition, for many industries there is a need to lift the middle

management capability. For some sectors, these career paths are considerably less well-defined and visible than others. Developing career paths and linking them to upskilling opportunities will enable people to move within an industry or to different parts of the economy. Recognition of skills and qualifications across different parts of the economy opens possibilities for managing the seasonality of employment and broadens the range of options for workers who do not wish to be constrained by narrow career paths. This also includes better opportunities to channel a diverse workforce into specific industries, such as Aviation or Finance.

There is an ongoing need to incentivise better pastoral care provision from vocational education providers and increase provision. Pastoral care and support are vital to ākonga Māori. It recognises that many learners' success will be achieved through innovative programme design and by supporting these learners through their learning journey.

Lastly, we consider supporting Māori success is fundamental to the success of the New Zealand economy. We have observed the continued growth of Māori businesses. However, there is an ongoing opportunity to broaden te ao Māori competencies across the Services sector for both Māori and non-Māori businesses. Te ao Māori perspectives must be embedded in the education system and business, which would provide solutions for all learners and businesses. This will require genuine partnership and embracing Te Tiriti o Waitangi by people from across New Zealand and all parts of the economy.

Key recommendations

GIVE EFFECT:

- TEC to enable the alignment of qualifications by:
 - Funding the new qualification being developed by Ringa Hora: Future of Services Sector skills. This new product is due to be introduced in 2024 and will gradually replace up to 30 entry-level qualifications and credentials. (See list of the relevant qualifications attached at Annex 3.)

HAVE REGARD

- TEC to fund flexible, tailored learning by:
 - Funding digital and online learning options
 - Funding in person training where needed
 - Funding mixture of on-job training and structured learning
 - Funding local and regional training and provision
- TEC to fund transferrable foundational and core skills by:
 - Supporting cross-industry qualifications and micro-credentials focused on core skills (e.g. customer service, communication and problem solving) and foundational learning (e.g. numeracy, literacy and digital literacy).
- TEC to further workforce mobility by:
 - Funding micro-credentials in specialised skills, such as technology and health and safety.
- TEC to promote career pathways for career changes and existing staff by:
 - Funding further management and leadership training targeted towards career changes and existing workforce in the Services sector.
- TEC to enable transitions into work by:
 - Funding more pastoral care training and learning opportunities for learners, especially for Māori and Pacific.
- TEC to promote equity outcomes for underserved learners by:
 - Funding more programmes which embed te ao Māori worldview into learning
 - Funding targeted programmes for Māori, Pacific, wāhine and rangatahi.

Industry-specific advice

Building on recent research conducted as well as the insights we have gathered by engaging with industry, a number of cross-cutting themes across all industries have been identified, including:

- chronic labour and skills shortages,
- competitive job markets (both internationally and domestically)
- a high turnover and
- upcoming industry changes (i.e., technological, legislative, and regulatory) impacting the way the industry works and the qualifications required.

Detailed insights and data on these themes for each industry is included in Annex 3.

Where possible, we have included the scale of provision required in our advice. Where the information is not currently available, we will continue to enhance our understanding for future investment advice. This is particularly relevant for industries which have historically been under-represented or may have limited existing data.

Aviation & Airport Services

The industry was significantly impacted by COVID-19 and lost 30% of their workforce due to a disrupted and severely constrained travel market. The industry has recovered quickly and has been rebuilding their workforce with many recruits being those returning to previously displaced roles. Air New Zealand reported the biggest recruitment drive in the airline's history⁶, recruiting 3,000 people since January 2022- 2,000 of which in the six months up to 31 December. Despite this, it is anticipated that skills and training demand will remain high due to an increasing demand as post-COVID-19 international travel grows.

There are still significant shortages for specific skill sets within the workforce, particularly as international demand for engineers and pilots increases. Air New Zealand have also identified a shortage of new ground staff and difficulty retaining lower-paid workers, particularly in Auckland, Christchurch and Wellington. This, combined with an aging workforce, means a need to promote more rangatahi and career changes in the industry to replace those who leave. The shortages are further compounded by increasing competition internationally for these skills.

The industry as a whole also has the lowest representation of Māori, especially in higher-wage roles such as pilots and flight instructors. In comparison, there is high Pacific representation. However, these workers occupy lower paid roles e.g. the ground crew and baggage handlers. In addition, Aviation & Airport Services has one of the lowest proportions of Tāngata Whaikaha in the industry. There is an increasing opportunity for the industry to support more entry points and expand the pathways into the industry, particularly for Māori, Pacific, Tāngata Whaikaha, and other diverse communities. Education provision needs to be more accessible for all workers and target historically underserved learners like Tāngata Whaikaha. Doing so will attract more Tāngata Whaikaha into the industry and further upskilling opportunities will encourage retention.

⁶ Air New Zealand – demand driving strong recovery, Air New Zealand Media Release, February 2023: <https://www.airnewzealand.co.nz/press-release-2023-air-new-zealand-demand-driving-strong-recovery>

Aviation & Airport Services key recommendations

GIVE EFFECT:

- TEC to address specialised training qualifications for skills shortages by funding additional provision in:
 - New Zealand Diploma in Aviation (Level 5)
 - New Zealand Diploma in Aviation-Flight Instructor (Level 6)
 - New Zealand Diploma in Airline Preparation (Level 6)
- TEC to address anticipated increase in demand for aviation support services including:
 - Support the industry to return to pre-COVID-levels by funding an additional 1,300 - 2,000 learners in New Zealand Certificate in Airport Operations (Level 4) with strands in Airport Customer Service, Airport Maintenance, Airport Safety, and Aviation Security.
 - Support the industry to return to pre-COVID-levels by funding additional 350-500 learners in New Zealand Certificate in Aviation (Ground Handling) (Level 3) with strands in Air Cargo, and Ramp Operations.

HAVE REGARD:

- TEC to fund more career progression programmes for Māori, Pacific, women and other under-represented groups in higher wage roles within the sector.

Regional Considerations: Advice from RSLGs supports need for investment in aviation in Marlborough





Cleaning Services

Since COVID-19, there has been an increase in demand for cleaning services. The industry is struggling to meet this demand due to low retention rates and workforce shortages across all levels, from entry-level roles to supervisor and team leader roles.

The industry has a large proportion of Māori, Pacific and migrant workers in the workforce. For many, English is their second language. There are low levels of literacy within the workforce, and a high percentage of the workforce have no post-school qualifications. In addition, many face time constraints for training due to part-time hours.

Cleaning also has the highest proportions of Tāngata Whaikaha (3.8%) compared to the total proportion in the workforce (2.6%). Therefore, there needs to be consideration of how education provision is made more accessible to ensure the best outcomes for all workers.

Cleaning Services key recommendations

HAVE REGARD:

- TEC to support flexible learning opportunities for cleaning qualifications and credentials by
 - Funding online and video options which may aid accessibility for part-time workers and those with low literacy levels.
- TEC to fund further opportunities for micro-credentials in health and safety training.
- TEC to fund foundational learning which could lower numeracy and literacy barriers.
- TEC to support upskilling of career changes and existing staff especially in lower wage roles to support career pathways and progression.



Contact Centres & Industry Support Services

There has been a steady increase in demand for Contact Centre services in the last few years. The upward trajectory is further accelerated by the COVID-19 pandemic and the recent weather events. Automation helped reduce the more basic interactions, however, it also meant that the nature of issues needing to be resolved by contact centre operators have become more complex, and the level of skill required has risen considerably.

The industry is increasingly demanding staff who excel in customer service, problem-solving and can rapidly adopt technology while being able to work beyond the standard 9–5 settings.

In combination, Contact Centre & Industry Support services face a series of labour market challenges with a competitive job market for highly skilled staff. The increased requirements mean the industry is facing further difficulties in attracting, upskilling, and retaining staff..

Contact Centres & Industry Support Services key recommendations

GIVE EFFECT:

- TEC to fund the new Future of Services Sector skills qualifications and/or credentials that bring together multiple entry-level qualifications into a consolidated qualification and/or credential that can be utilised across industries. This qualification and/or credential is currently being developed by Ringa Hora and due to be introduced in 2024.

HAVE REGARD:

- TEC to support upskilling of career changes and existing staff especially in lower wage roles to support career pathways and progression by:
 - Funding more micro-credentials focused on technology.
 - Funding more foundational learning which could lower numeracy and literacy barriers.

Regional Considerations: Advice from RSLGs supports need for investment in Industry Support services in Nelson Tasman.

Hospitality & Food Services

The Hospitality industry suffered significantly during COVID-19, with lockdowns, health regulations and border closures creating challenging business conditions. While the industry bounced back to pre-COVID-19 trading levels by late 2022, this has played out differently across businesses and regions and there is still limited industry growth with only 0.37% in 2022, the smallest seen in more than 10 years⁷.

In addition, the industry is facing significant staffing shortages, with an estimated 30,000 additional workers needed to meet current demand. In particular, there are shortages of chefs, customer service positions, and attendants⁸. This shortage has been exacerbated by the industry having relatively high levels of turnover, overseas workers being slow to return to New Zealand, and many young people who traditionally work in the sector heading overseas for delayed OEs.

To tackle the skills shortage, the industry needs effective solutions for attracting and retaining employees, including competitive wages, good working conditions, and investment in training and professional development that meets the needs of the highly mobile workforce. The industry is requesting transferable, short, and stackable training. This training should be fit-for-purpose and flexible enough to be done in a time and place that suits businesses and learners.

Hospitality & Food Services key recommendations

GIVE EFFECT:

- TEC to support specialised, fit-for-purpose training qualifications by
 - Funding anticipated new qualifications in cookery (Levels 3 to 6). Ringa Hora is currently developing the Culinary Koha project which is expected to introduce cookery Levels 3 to 6 to address skills shortages in the hospitality sector.
- With a projected 3.5%* growth in the hospitality industry and 4,200 chefs currently on skills visas which require Level 4+ qualifications, we recommend TEC further fund the following
 - A 500-1,000 increase of provision of New Zealand Certificate in Cookery (Level 4 to 6) to meet industry demand and reduce reliance on migrant skills.
 - New Zealand Diplomas in Hospitality Management available at Levels 5 and 6 to support management level training across the industry.
- TEC to support regional need by
 - Increasing funding in Food, Hospitality and Personal Services Certificate (Level 1-3) in Tāmaki Makaurau.

HAVE REGARD:

- TEC to invest in flexible, tailored learning options by
 - Funding mixture of on job training and structured learning
 - Funding digital learning options where relevant
- TEC to increase funding for fit-for-purpose cross-industry qualifications focused on core skills such as customer service, communication and problem solving.
- TEC to increase funding in micro-credentials to support early entry into the workforce, career progression and pathways.

Regional Considerations: Advice from RSLGs supports need for investment in hospitality in the following regions:

- Nelson Tasman
- Te Tai Poutini
- West Coast
- Tāmaki Makaurau
- Taranaki
- Manuwatū-Whanganui
- Pōneke

⁷ 2022 Hospitality Report, Restaurant Association, December 2022: <https://www.restaurantnz.co.nz/trends/2022-hospitality-report/>

⁸ Tourism in New Zealand, IBIS World, August 2022: <https://www.ibisworld.com/nz/industry/tourism/1903/>

*Statistics on the growth of the hospitality industry comes from Infometrics.



Security & Defence Services

The Security and Defence industry has grown significantly over the last decade, with the security workforce increasing by 30% in the past 6 years.

With the return of public events post-COVID-19, the demand for security services is anticipated to rise. Additionally, there has been an increase in reported crimes, particularly ram raids which have featured prominently in recent media. This has placed increasing demands on the security industry, especially given the legislative limitations on security staff when responding to crime. As such, there has been a push for security staff to undertake more specialised training. A key barrier to this training is the limited number of industry-endorsed trainers/providers offering the relevant skills, especially given the nature of the training needs to be tailored to different location and context and is often required to be delivered face to face.

However, industry at a recent Security hui noted that there had been a recent decline in the uptake of industry qualifications. Pastoral care has been identified as an essential element to promote new entrants into vocational education and support retention. In addition, clearer career pathways need to be developed as this will support attraction and retention of staff in the industry. Industry have also identified a middle management gap and have signalled that higher level qualifications, for example at Level 5, may be needed to address this issue.

Security has one of the highest proportions of Tāngata Whaikaha (3%) compared to the total proportion in the workforce (2.6%). Therefore, there needs to be consideration of how education provision is made more accessible to ensure the best outcomes for all workers.

The Defence Force is also expected to grow, with the Government committing to expanding operations in the South Pacific⁹. However, the Defence Force has identified attraction and retention as key areas for focus as it has lost 30% of its uniformed staff in two years, highlighting a shortage in a number of skills, particularly in the combat support squadrons¹⁰.

There are currently approximately 12,000 New Zealand Defence Force staff, excluding reservists¹¹. These workers were vital in recent efforts to support cyclone-affected regions across the motu.

The Defence Force has a clear pathway for workers to progress within their careers. Members of the Defence Force usually choose a particular trade and are provided training through a wide variety of tertiary education paths spanning across university, technology and trade training. This, combined with the strong links the defence sector has with vocational education provision, means that the defence sector is relatively well served in regards to career progression. However, the Defence Force has identified attraction and retention as key areas for focus.

Note that the Defence Force has one of the lowest proportion of Tāngata Whaikaha (1.7%). This could be an opportunity to improve accessibility for all workers.

⁹ Defence in New Zealand industry report, IBIS, June 2022: <https://www.ibisworld.com/nz/industry/defence/589/>

¹⁰ 'Defence Force spends \$60m to stop its staff walking out the door', Stuff News Media Release, 2023: Defence Force spends \$60m to stop its staff walking out the door | Stuff.co.nz

¹¹ Defence Force facts and figures, Ministry of Defence Website, June 2022: <https://www.defence.govt.nz/engage/defence-force-facts-and-figures/>


Security & Defence Services key recommendations

GIVE EFFECT:

- Support the security industry to return to pre-COVID-19 level of projected growth of 900 learners a year (up from 500). the increase should spread across the following:
 - National Certificate in Security (Level 3)
 - National Certificate in Security (Level 4)
 - New Zealand Diploma in Security (Level 6).
- TEC to support upskilling of career changes and existing staff especially in lower wage roles to support career pathways and progression by increasing the funding in management courses:
 - Certificate in Security Management-Supervision (Level 5) and Diploma in Security Management (Level 6).
- TEC to fund specialised training qualification to be delivered in-person:
 - Conflict management (Level 3 and 4)– particularly for those based outside the main centres.

HAVE REGARD:

- TEC to increase funding in pastoral care within security and defence training and learning, especially for Māori and Pacific learners.
- TEC to increase funding in more short, stackable micro-credentials.



SECURITY

Tourism & Travel Services

The Tourism industry is one of New Zealand's most important economic growth drivers. Tourism has been signalled as a Government priority in its economic strategy through the Tourism Industry Transformation Plan (ITP) and the subsequent He Mahere Tiaki Kaimahi | Better Work Action Plan. The Tourism ITP highlighted people as the foundation of enabling the Tourism industry, and fit-for-purpose education and training was a priority. He Mahere Tiaki Kaimahi emphasises investment in tourism workers as fundamental to achieving transformational shifts and Ringa Hora has committed to partner with people from across the industry to ensure fit-for-purpose education and training.

The industry was significantly impacted by COVID-19 and lost 30% of their workforce due to a disrupted and severely constrained travel market¹². While they recovered quickly, the workforce is gradually rebuilding to meet an increasing demand as post-COVID-19 domestic and international travel grows. Demand for tourism offerings is also evolving with customers increasingly demanding more meaningful, connected experiences and a shift to smaller volume, higher yield products. The industry is now predicted to have an annual growth of 5.7% between 2023 and 2028. Despite this growth, the industry has reported difficulty recruiting the staff to fill these positions due to limited applicants. In particular, there are shortages of chefs, customer service positions, and attendants¹³. In addition, there is a demand for customer service skills with recent industry engagement highlighting the importance of these service skills for work readiness.



¹² Scarlatti, Ringa Hora Core workforce, 2022: <https://www.sweetanalytics.co.nz/portals/wdc-dashboard-ringa-hora/>

¹³ Tourism in New Zealand, IBIS World, August 2022: <https://www.ibisworld.com/nz/industry/tourism/1903/>

Tourism & Travel Services key recommendations

GIVE EFFECT:

- TEC to fund 200 (50%) more learners in tourism management.
- Gradually lift provision to pre-COVID-19 levels in tourism studies over the next three years. Provision dropped from approximately 4,200 learners to 1,700 per annum*. Therefore, TEC to fund on average an increase of 800 learners each year over the next three years.
- TEC to support cross-industry qualifications focused on core skills (e.g. customer service, communication, and problem solving by
 - Funding the new Future of Services Sector skills qualifications and/or credentials that bring together multiple entry-level qualifications into a consolidated qualification and/or credential that can be utilised across industries. This qualification and/or credential is currently being developed by Ringa Hora and due to be introduced in 2024.
- TEC to fund more micro-credentials. Suggested courses identified in Government's Tourism Industry Transformation Plan include:

<ul style="list-style-type: none"> ○ Biodiversity and conservation ○ New Zealand history ○ Mātauranga Māori ○ Tikanga Māori ○ Te reo Māori ○ Business management ○ Leadership development ○ Problem solving 	<ul style="list-style-type: none"> ○ Customer service ○ Customer management ○ Systems design ○ Innovation ○ Technology literacy ○ Story-telling ○ Guiding ○ Communication ○ Health and safety.
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- TEC to support regional need by:
 - Increasing funding in Tour Guiding (Level 4) in the Nelson Tasman region.

HAVE REGARD:

- TEC to support upskilling of career changes and existing staff especially in lower-wage roles to support career pathways and progression.
- TEC to support management-level training across the industry to further enhance industry resilience.

Regional Considerations: Advice from RSLGs supports need for investment in tourism in the following regions:

- | | |
|--------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> • Nelson Tasman • Te Tai Poutini in West Coast • Tāmaki Makaurau | <ul style="list-style-type: none"> • Taranaki • Manuwatū-Whanganui • Pōneke |
|--------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|



Business & Professional Services

Business and Professional Services represent diverse industries, such as legal services, accounting, sex-work, business administration, and labour associations. Some occupations in this industry require high-level qualifications, while others have limited education and training options. Technology is an increasingly important part of the sector, as is health and safety, which is becoming a compliance requirement for many parts of the industry.

Business management training is vital for the industry, however, training on this could be better contextualised for parts of the industry like parking services or sex-work services where there are currently limited relevant options.

The industry has the lowest Pacific participation out of all 10 industry groupings Ringa Hora serves. We consider there is an increasing opportunity to target training which can support women, Māori, and Pacific ākonga not only to improve numbers within the industry but also those in leadership roles. This could be done through further supporting flexible delivery options and targeted management programmes.

Business & Professional Services key recommendations

GIVE EFFECT:

- TEC to increase funding in cross-industry qualifications focused on core skills (e.g. customer service, communication, and problem solving) by
 - Funding the new Future of Services Sector skills qualifications and/or credentials that bring together multiple entry-level qualifications into a consolidated qualification and/or credential that can be utilised across industries. This qualification and/or credential is currently being developed by Ringa Hora and due to be introduced in 2024.
- TEC to increase funding in supervisor and management capability qualifications, particularly entry-level management training. This training would target those who are currently working in the Services sector to help lift the overall capability of the workforce, as well as building resilience to respond to ongoing uncertainties. For example increase funding in:
 - New Zealand Certificate in Business (First Line Management) (Level 4).
 - New Zealand Diploma in Business-Leadership and Management (Level 5).
 - New Zealand Diploma in Business-Leadership and Management (Level 6).
 - New Zealand Diploma in Business-Māori Business and Management (Level 6).

HAVE REGARD:

- TEC to increase funding in programmes and delivery options for women, Māori, and Pacific ākonga.
- TEC to increase funding in shorter courses and micro-credentials.

Regional Considerations: Advice from RSLGs supports need for investment in Business and Professional services in Tāmaki Makaurau.



Government Services

Government Services represents both central and local governments. Over the past five years, employment in the public sector has increased steadily by 15%. However, the industry is facing key labour shortages, including a shortage of project managers, building inspectors, IT teams, accountants, regulators, and engagement/communications specialists. In addition, the industry has identified skills shortages in key areas such as regulatory and industry demand for core skills, particularly in regional councils.

There is no clear, established entry point or career pathway into government employment. Instead, industry has reported that government roles appear transient in nature, with many jumping between central and local within their career depending on their personal need. To support improved career pathways, the industry could pursue a nationally recognised qualification that supports a set of common core skills that could be accepted across the Government Services industry, facilitating ease of transition and change across departments for employees. An example of this is the delivery of Regulatory Compliance Qualifications, which SkillsOrg has successfully delivered in the past. The G-REG initiative and Regulatory Compliance Qualifications are due to be refreshed in 2023 and sit under the Te Pūkenga umbrella for delivery.

There is also increasing demand to lift te ao Māori competency for those working in central and local Government, particularly those working with iwi, hapū and Māori communities. While engagement with local iwi varies depending on the local government location and their relationship with their local iwi, it is a significant core government policy direction, and the sector needs to explore opportunities to improve engagement with iwi and ensure that Māori perspectives are integral to decision-making processes.

Government Services key recommendations

HAVE REGARD:

- TEC to increase funding in cross-industry qualifications focused on core skills (e.g. customer service, communication and problem solving) which have wider focus to support cross agency work career pathways and mobility throughout government. For example the regulatory skills are offered in the G-REG. Government Services is not currently included in Future of Services Sector skills, however, there is scope for this to be included at a later stage.
- TEC to increase funding in programmes and delivery options for women, Māori, and Pacific ākonga.



Financial & Advisory Services

There had been a gradual increase in financial and advisory services industry, and the recent weather events and economic conditions meant that there had been a further lift in demand. In terms of the existing workforce, the regulatory changes and an aging workforce mean that there are increasing gaps in the industry's ability to respond to the demand.

As it stands, there have been perceived barriers for industries to attract new entrants as the industry predominately targets career changers rather than those leaving the education system. This also implies vocational education considerations that could be explored, including providing tailored training to fit around the learner, especially those needing to undertake study outside the standard hours, creating career pathways within the industry – especially for Māori and Pāsifika learners, promoting numeracy and literacy, and supporting the development of registered and licensed financial advisors.

Financial & Advisory Services key recommendations

HAVE REGARD:

- TEC to increase funding in programmes and delivery options for women, Māori, and Pacific ākonga.
- TEC to increase funding in management capability across industries.
- TEC to support career pathways by upskilling career changes and existing staff.



Retail & Distribution Services

There has been a significant fluctuation in the retail industry in the last few years. The inflationary pressure and economic slowdown meant that some retailers are experiencing declines in sales in-store and online. The retail industry also has one of the highest staff turnovers and typically loses 50% of its staff within 12 months of entering the industry.

The movement in consumer demanding more flexibility (online, in-store, picked up, delivery, opening hours) also meant that the skills requirements for those working in the industry had shifted upwards – especially around supporting literacy and problem-solving skills for those already working in the industry to help retain them in the industry.

Retail & Distribution Services key recommendations

GIVE EFFECT:

- TEC to increase funding in cross-industry qualifications focused on core skills (e.g. customer service, communication, and problem solving by
 - Funding the new Future of Services Sector skills qualifications and/or credentials that bring together multiple entry-level qualifications into a consolidated qualification and/or credential that can be utilised across industries. This qualification and/or credential is currently being developed by Ringa Hora and due to be introduced in 2024.

HAVE REGARD:

- TEC to increase funding in micro-credentials for technology upskilling.

Regional Considerations: Advice from RSLGs supports need for investment in retail and trade services in the following regions:

- Nelson Tasman
- Te Tai Poutini in West Coast
- Tāmaki Makaurau
- Tairāwhiti
- Southland
- Manuwatū-Whanganui.



Real Estate & Rental Services

The Real Estate & Rental Services industry is vulnerable to economic conditions. It has been in the public spotlight in the past few years due to the limited availability of rental housing, high-interest rates, and large changes to property prices. The number of real estate agents fluctuates considerably with these changing conditions in the housing market and economy more generally. In the next few years, the prospects for employment growth in real estate agent will look relatively muted. There is an ongoing need for branch managers, an occupation requiring a Level 5 qualification.

Significant change is also on the horizon for residential property managers as the legislation to regulate the industry further (to be introduced in mid-2023) looks set to put licensing and qualification requirements in place. This will require a significant change in practice in the sector and a step change in the level of training in the sector.

The sector is increasingly focusing on equity considerations and ensuring that the workforce better reflects the customers and communities they serve. Māori and Pacific people have traditionally been under-represented in the sector, particularly in sales agent roles.

The Real Estate & Rental Services industry is comprised of many self-employed and sole traders, who can be more vulnerable to economic upheaval and upcoming changes such as the housing crisis, the predicted cooling residential market, commercial conditions, consolidation of industry players, and the limited diversification of the industry, limited connection with Māori and privacy concerns.

Real Estate & Rental Services key recommendations

GIVE EFFECT:

- TEC to increase funding in management qualifications by increasing funding by 5-10% in Certificate in Real Estate (Branch Manager) (Level 5).

HAVE REGARD:

- TEC to support additional demand in response to upcoming regulatory changes. As of the 2018 census there were 7,900 property managers employed in New Zealand. New legislation will require property managers to become licenced and qualified. It is anticipated we may need an additional 1,000 learner placements to respond to demand. Therefore, TEC should:
 - Increase the funding in New Zealand Certificate in Residential Property Management (Level 4) for an estimated 1,000 learners.
- TEC to increase funding in flexible learning options for workers.
- TEC to support upskilling of existing staff especially in lower-wage roles to support career pathways and progression.

Regional Considerations: Advice from RSLGs supports need for investment in Real Estate in Manuwatū-Whanganui.

Annex 1: Methodology for Investment Advice

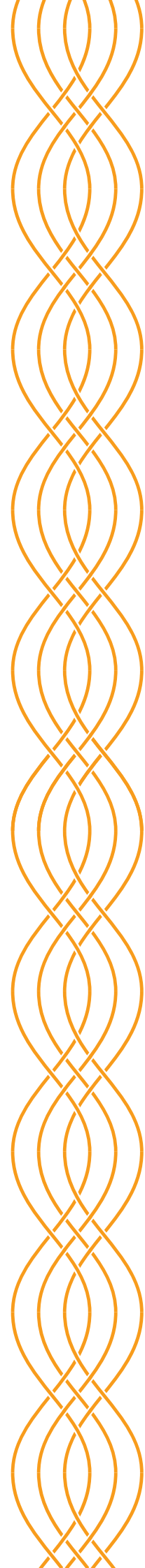
How we developed our advice

Our advice to TEC has been provided in three categories as outlined by TEC: “Give Effect” (recommending priority action), “Have Regard” (recommending secondary action/taking note). We have signalled where more information is needed.

This advice has been informed by our criteria framework. Our criteria framework takes an industry-by-industry approach looking at the changes, shortages, employment outcomes and accessibility of training and education in each industry. The framework was created to guide when Ringa Hora should recommend for TEC “Give Effect” or “Have Regard” and is based on available quantitative and qualitative evidence:

- Change: evidence of industry growth, workforce pipeline disruption, aging workforce.
- Shortage: evidence of labour shortage in volume, at specific levels or in specific roles and/or a skills shortage.
- Employment outcome: evidence of link between education provision and employment outcome or of a skills mismatch in the industry (i.e., provision is not currently meeting demand).
- Accessibility: diversity of the workforce (looking at where there is a high or low representation and/or at specific levels or in specific roles) and/or where there are learning and training needs for the workforce (i.e., mode or delivery requirements).

If the material accumulated to date does not cover the domains above, it has been flagged as having Additional information required on the depth and quantum of demand. This will be marked as an area that Ringa Hora can build on in future investment advice.





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