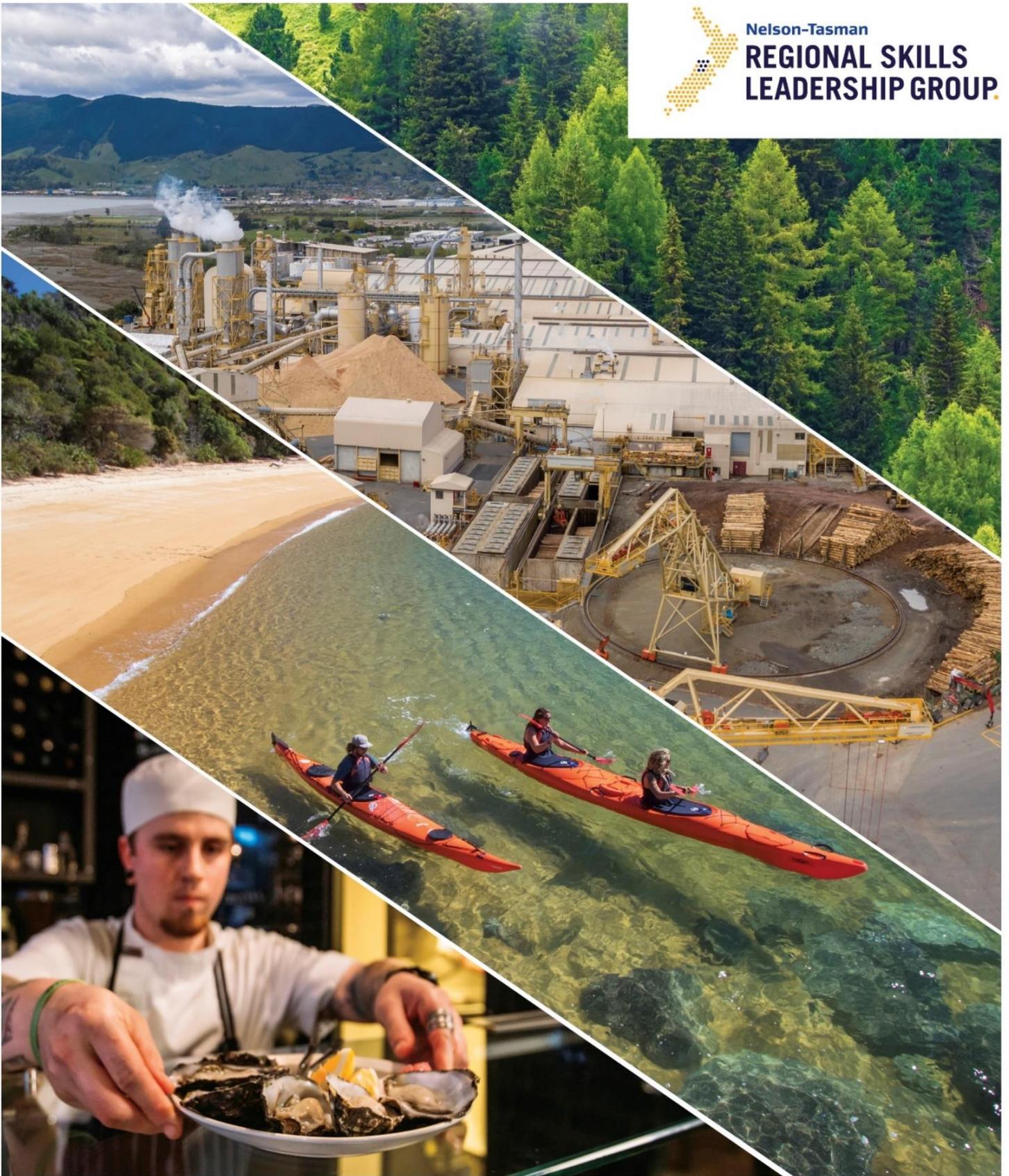




Nelson-Tasman  
**REGIONAL SKILLS  
LEADERSHIP GROUP.**



# **Te Mahere Ohumahi ā-Rohe o Te Taihu o Te Waka-a-Māui**

Nelson Tasman Regional Workforce Plan 2023

# Titiro whakamuri Kōkiri whakamua

Look back and reflect so you can move forward

## **Nelson Tasman RSLG Regional Workforce Plan 2023**

This document reflects the views of the Nelson Tasman RSLG. It does not reflect the views of the Ministry of Business, Innovation & Employment or any other agency and is not government policy.

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## He kupu takamua nā ngā Hoa-toihau | A foreword from our Co-Chairs

Kia ora tatou

In June 2022 the Nelson Tasman Regional Workforce Plan was launched for the purpose of helping our region better understand, coordinate, and respond to our labour market challenges. As Co-chairs of the Nelson Tasman Regional Skills Leadership Group (RSLG) we would like to take this opportunity to extend our thanks and gratitude to our RSLG members, our community and our business sector for your insights, perseverance, and willingness to contribute to the ongoing improvement of our region's labour market.

During the last year the Nelson Tasman RSLG has been on a continuous learning journey. We have sought out our regional stakeholders to converse and listen to gain a better understanding of our labour market challenges. Nelson Tasman has strong collaboration across both economic and social development, highlighted by the Te Taihū Intergenerational Strategy as the unifying regional strategy to address those issues. That regional collaboration has continued to strengthen over the last year, with an increasing number of shared regional plans and actions (e.g., the [Nelson Tasman Regeneration Plan](#) released by the Kōkiri Forum). The RSLG work reflects that collaboration, focusing our regional workforce planning, regional actions, and national advice to the Tertiary Education Commission (TEC), on sectors identified as having the most opportunity to address our regional economic challenges and enhance wellbeing.



Alongside several challenges recognised in the 2022 Regional Workforce Plan (RWP) we identified opportunities to work with sectors, and to understand the challenges associated with our older worker demographic and the opportunities of our rangatahi workforce. We recognise the significant challenges with productivity and wages in certain sectors, which along with seasonality exacerbate workforce issues. We continue to work collaboratively to ensure a more productive, resilient Nelson Tasman.

In the year ahead we will continue gathering our regional economic, industry and community plans into a wider workforce development framework, to focus on developing the skills we need to build the resilience and wellbeing of our communities. We will continue working collectively with Te Taihū Iwi; our regional partners; our education and vocational training providers; and with the Workforce Development Councils (WDCs) as they develop qualifications and training that meets the needs of our regional industries.

We will also continue to be your voice in providing advice to central government about what is needed in our region to enhance our workforce development, in a way that supports our regional economic development direction and meets our aspirations and the wellbeing of our communities.

Thank you for your ongoing support and we look forward to working together with you on this journey.

Justin Carter, Iwi Co-Chair

Ali Boswijk, Co-Chair

## Tō mātou whakakitenga | Our vision

Our communities and people are enabled to thrive, ensuring Nelson Tasman is not only a great place to live, but also a great place to work

Our vision aligns with Te Tauihu Intergenerational Strategy. To achieve this vision, we have three workforce outcomes, each with a specific set of aspirations for Nelson Tasman:



We have highly productive, well-functioning sectors, with welcoming workplaces that offer decent work.



We anticipate and plan for the future.



We provide support for our people and our businesses, through a responsive education, vocational training, and career development environment.

## Tō mātou horopaki ā-rohe | Our regional context

Welcome to the Nelson Tasman Regional Workforce Plan (RWP) 2023. This document reviews and builds on our 2022 RWP, as part of a yearly review process. A full review is planned in 2025.

In this RWP you will find last year's highlights showcasing some of our region's achievements, the lessons we have learnt as we progress our actions, the actions we will focus on this year, the advice we provided to the Tertiary Education Commission (TEC) to help focus their funding decisions for 2024, and our progress against the year one priority actions. In addition, we are reporting on the regional workforce challenges

and opportunities of two new sectors important to our region's growth – the visitor economy, and forestry and wood processing.

The lack of regionally specific data continues to limit our ability to identify gaps and plan solutions to workforce and skills challenges. Generally, the quantitative evidence base for the Nelson Tasman labour market is poor, mostly attributable to our small population base and margins of error. We continue to highlight the need for better regional data. To supplement and add depth to the available data, we remain focused on gathering qualitative regional evidence.

## Key labour market indicators

The Nelson Tasman economy performed well in the year to March 2022, with both GDP and the number of filled jobs increasing to pre-COVID-19 levels, after decreasing in 2021. GDP was up 5.6% and the number of filled jobs increased 2.3% from a year earlier.<sup>1</sup>

Productivity increased by 3.2% from the year earlier compared with a national increase of 2.3%. Despite this growth, our region's productivity remains the second lowest in New Zealand and our wages are the lowest in New Zealand.<sup>2</sup>

The key main urban areas of Nelson, Richmond, and Motueka had 79% of the region's employment in 2022. While job growth over the past decade has been slower in Nelson City (0.5%pa), it has been particularly rapid in Richmond (4.5%pa) and Motueka (3.1%pa), and other (mainly rural) areas (2.8%pa)<sup>3</sup>.

For the March 2023 quarter, our regional employment rate was 68%, unemployment was 3% and the labour force participation rate was 70%. The proportion of people who indicated they would like to do more paid work (underutilisation rate) was 10%. The working age population grew 7%, increasing to 92,900. The number of people employed grew 6%, increasing to 62,900<sup>4</sup>. Filled jobs grew by over 1,700 between April 2022 (46,290) and April 2023 (48,000)<sup>5</sup>. During 2022, the number of Māori in employment grew by 5.5%.

Nelson Tasman has a higher level of self-employment at 18% compared to the national rate of 16%. In addition, 96% of our businesses employ less than 20 people. These two facts highlight the need for a collective regional approach to workforce planning and development.

In 2021, Nelson Tasman had 1,500 school leavers of which just over a quarter (27%) had their first enrolment in further study in the Nelson Tasman region<sup>6</sup>. For the March 2023 quarter, Nelson Tasman youth (15–24-year-olds) not in education employment or training (NEET) continued to be relatively high at an estimated 15%, (noting the data combines Marlborough, Nelson Tasman, and West Coast regions). The NEET rate was 18% for 20–24-year-olds but only 5% for 15–19-year-olds.<sup>7</sup>

Our region's key production, processing and manufacturing focuses of forestry, horticulture, and the ocean economy have all expanded strongly over the past decade. Among broad industry groups, manufacturing was the largest contributor to regional GDP in 2022. Other key employing industries include health care and social assistance, construction, retail, professional services, accommodation and food services, and education.<sup>8</sup>

### Proportion of GDP



#### Biggest contributors to economic growth, 2012-2022

Construction	\$222m
Professional, Scientific & Technical Services	\$194m
Retail Trade	\$158m
Manufacturing	\$139m
Health Care & Social Assistance	\$100m
All other industries	\$711m
<b>Total increase in GDP</b>	<b>\$1,524m</b>

### Proportion of Filled Jobs



#### Industries that created the most jobs, 2012-2022

Construction	2,068
Manufacturing	1,188
Health Care & Social Assistance	957
Professional, Scientific & Technical Services	954
Agricultural, Forestry & Fishing	694
All other industries	3,685
<b>Total increase in employment</b>	<b>9,547</b>

Source: Annual Economic Profile, Infometrics, accessed 7 June 2023

## Regional workforce outlook for our priority sectors



### Construction<sup>9</sup>

Construction is a significant employer in and contributor to the Nelson Tasman economy and has been so for the last 10 years.

In 2022 it was the third largest contributor to the region's GDP at \$5.07m (8.2% of the region's total GDP). Construction made up 10.2% of filled jobs and construction was the fourth largest sector for self-employment at 31%.<sup>11</sup>

In the year to March 2022, its contribution to the region's employment grew by 6.8%, making it the sector that created the most jobs in the region.

Between 2012 and 2022, construction was the single biggest contributor to economic growth in Nelson Tasman - \$222m out of a total increase in GDP of \$1,524m. It was also the industry which created the most jobs - 2,000 out of 9,500.

Workforce demand profiling indicates an ongoing demand for construction workers with relevant qualifications. Critical workforce shortages are expected in residential and non-residential building construction, road and bridge construction, electrical services, and painting and decorating services.<sup>12</sup>



### Aquaculture<sup>10</sup>

Nelson Tasman has more than 2,700 jobs in fishing, aquaculture, and seafood processing, representing 4.7% of employment, compared to 0.4% nationally. The region, together with Marlborough, has the highest share of employment in New Zealand dedicated to ocean food production.

Nelson Tasman is also a leading region in industries that support the ocean economy, including boat building and repairs, textiles (ropes), scientific research, and specialisations in high-value products such as nutraceuticals and fish oils.

This clustering of activity, coupled with the supporting infrastructure, builds the region's competitive advantage in the ocean economy. The [New Zealand Government's Aquaculture Strategy](#) outlines opportunities to grow the aquaculture industry to \$3 billion in annual sales by 2035, up on \$600+ million in annual sales when the strategy was released in 2019.



Forecast job openings for Nelson Tasman show gaps in key sectors, including construction. Table 1 below shows industries where demand is expected to be high in the region in 2028.

**Table 1: Forecast skill shortages for Nelson Tasman in 2028**

In 2028, jobs in these industries are expected to make up a considerable number of all job openings in the region and demand is expected to be higher than the national average

<b>Retail Trade</b>	<b>Manufacturing</b>	<b>Health Care &amp; Social Assistance</b>	<b>Construction</b>	<b>Agriculture, Forestry &amp; Fishing</b>
» Supermarket & Grocery Stores	» Seafood Processing	» Hospitals	» House Construction	» Apple & Pear Growing
» Hardware & Building Supplies Retailing	» Log Sawmilling	» Aged Care Residential Services	» Electrical Services	» Logging
» Car Retailing	» Reconstituted Wood Product Manufacturing	» Other Allied Health Services	» Non-Residential Building Construction	» Vegetable Growing (outdoors)
» Department Stores	» Wine & Other Alcoholic Beverage Manufacturing	» Other Health Care Services	» Road & Bridge Construction	» Dairy Cattle Farming
» Other Store-Based Retailing	» Other Machinery & Equipment Manufacturing		» Painting & Decorating Services	» Other Agriculture & Fishing Support Services

In 2028, jobs in these industries are expected to make up a considerable number of all job openings in the region

<b>Accommodation &amp; Food Services</b>	<b>Professional, Scientific &amp; Technical Services</b>	<b>Education &amp; Training</b>
» Cafes & Restaurants	» Management Advice & Other Consulting Services	» Secondary Education
» Accommodation	» Scientific Research Services	» Primary Education
» Takeaway Food Services	» Legal Services	» Higher Education
» Pubs, Taverns & Bars	» Engineering Design & Consulting Services	» Preschool Education

Source: 2028 Infometrics forecasts for the Nelson Tasman Region, ANZSIC Level 1 and Level 4



## Ngā hua nui ā-rohe nō te tau kua hipa | Regional highlights from the last year

Te Taihū Intergenerational Strategy states that *'transformative change often starts small, but it is strategic and enduring'*. This resonates as we continue to work collectively across our region to identify and deliver actions and initiatives for our region's workforce, allowing our economy, our businesses, and most importantly, our people to thrive.



### **We have created a collaborative strategic approach to regional workforce issues and opportunities**

We have worked collaboratively with a wide range of organisations, businesses and community leaders to understand, identify and resolve regional workforce challenges. This has included industry bodies such as Aquaculture NZ. We have been able to develop and access funding for the implementation of a national workforce aquaculture plan, which includes a stocktake of the aquaculture workforce. Alongside the Nelson Regional Development Agency (NRDA) we have worked with our region's forestry and wood processing businesses to understand their workforce challenges.

We have built strong relationships with the six Workforce Development Councils (WDCs) that set standards, develop qualifications, and help shape the curriculum of vocational education for the industries they represent. We have worked closely with Te Pūkenga | NMIT - the main regional provider of vocational education for our region - and our other vocational providers to understand the offerings, opportunities and challenges in meeting our workforce development needs.

The Tertiary Education Commission (TEC), whose functions include funding and monitoring the performance of the tertiary education sector, is a key partner in supporting a collaborative regional strategic approach to addressing our workforce challenges. We have developed and delivered advice to the TEC on the vocational training our region and industries need to thrive. By clearly understanding our regional workforce needs, TEC will be able to ensure provision of vocational training to meet the identified demand. Alongside our recommendations, we also highlighted the need for detailed regional workforce data and

further research to help us understand the opportunities and challenges for our demographic key groups.



### **We are shaping regional solutions to meet regional labour market needs**

Through gathering regional insights and collaborating with organisations, agencies, and employers, we have been able to identify and shape regional solutions for our key sectors and demographic groups.

One of our focuses this year has been to understand how to support our young people transition from school to employment in our region. We have also started to deliver the actions the Older Workers subgroup identified to support the reskilling, upskilling and job shaping that will enable our older workers (50+ years) to continue in paid employment if they wish to do so.

We have seen significant progress on our aquaculture actions and will continue to support the work to map and promote aquaculture career pathways. We have had success with some of our construction actions, noting the ongoing work to gain funding for developing a skills pipeline to support capital projects. We have investigated opportunities to provide more allied trades training in the region and supported Etco, the Electrical Training Company, to establish a strong regional presence.





## **We have coordinated information and led discussion about the local labour market**

Our quarterly regional local insights reports have increased awareness and understanding of our regional workforce issues and opportunities. We gathered these insights through our collaboration with local organisations, agencies, and employers.

The significant challenge of our low regional productivity and ‘sunshine-wages’ alongside the importance of developing our regional workforce was highlighted several times on the front page of regional newspapers. The funding support to implement the Aquaculture Workforce Plan received both national and regional media attention.



## **We are using our role to influence government decision makers**

Along with NRDA, we have worked to coordinate and deliver a regional response to Industry Transformation Plans for the Tourism and the Forestry and Wood Processing sectors. We have contributed to national public consultation on aspects of immigration; changes in the education system; and the reshaping of the careers system.

Looking ahead, we are refining and focusing our current priorities and have taken the opportunity to actively recruit new RSLG members who can bring a youth voice and community perspective to our group.



## Ngā rāngai mātāmua hou | New priority sectors

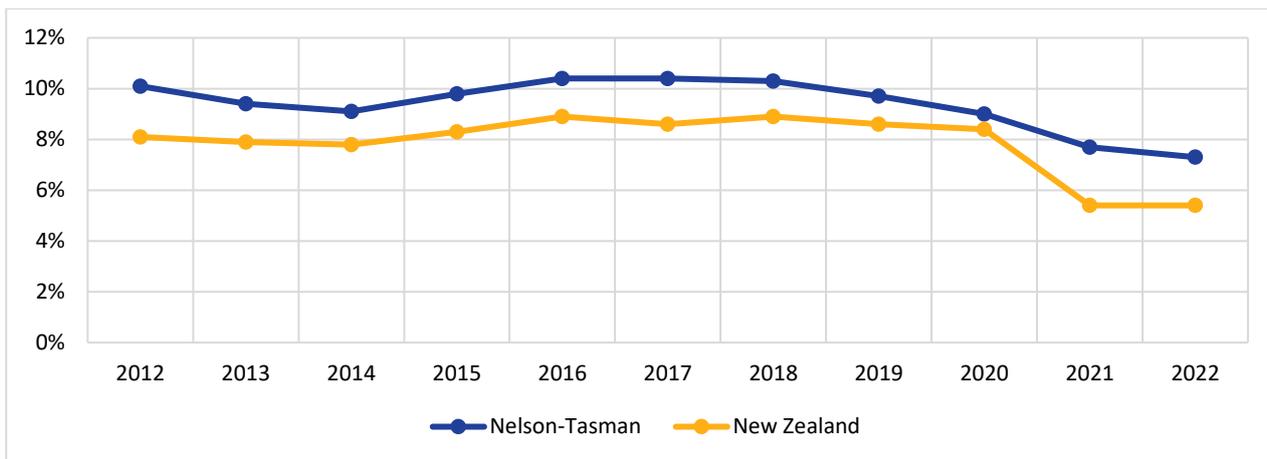


### The Visitor Economy

Nelson Tasman offers visitors diverse and colourful experiences whether they are based in nature or in the culture and the arts of the region. The natural landscape with a unique combination of alpine and coastal environments and three national parks are a major drawcard for visitors. The region also offers cultural, creative experiences and has built a reputation as a centre for the arts. This is supported by markets, a wide calendar of events and opportunities to engage with local artisans at work.

The visitor economy is comprised of both tourism and hospitality businesses contributing \$233 million towards GDP in Nelson Tasman in 2022, 3.8% of Nelson Tasman's economic output. Growth in the industry in Nelson Tasman has averaged 3.6% over the last ten years, compared with 2.4% in New Zealand<sup>13</sup>. Overall, tourism employment in the region accounts for 7.3% of total regional employment or 4,295 full time equivalent jobs. This was the seventh largest employment sector in the region in 2022.

#### Tourism share of total employment, 2012-2022



The composition of the workforce changes as people move into, around, and out of the sector, with some more physically demanding jobs less appealing to an aging workforce. Work in the visitor economy has always had seasonal peaks and troughs and many businesses rely on working holiday visa makers to fill workforce gaps. During the COVID-19 pandemic, closed international borders and a downturn in business has resulted in approximately 1,000 less people working in the industry in Nelson Tasman in 2022 as compared with 2019. Changes in immigration settings have compounded the situation by reducing access to temporary migrant workers<sup>14</sup>. Employment forecasts to 2028 show high visitor sector labour demand for the region<sup>15</sup>.

Vocational education for tourism and hospitality is largely provided in the region by the national vocational education provider Te Pūkenga | NMIT and Service IQ. NMIT has offered education and training in tourism and hospitality for three decades with a range of programmes in travel and tourism, cookery and food and beverage from Levels 3 to 5. Te Pūkenga | NMIT's two-year, Level 4 and 5, Adventure Tourism and Guiding programme has shown consistent demand attracting domestic and international students.

In the current economic situation with low unemployment and high labour demand, there has been a significant reduction in people applying for programmes at Te Pūkenga | NMIT and an increase in the number of learners in the

workplace<sup>16</sup>. This situation could change as the economy tightens and there is less demand for labour. Evidence from the industry<sup>17</sup> indicates employers across most sectors want training to be short and sharp, delivered when they need it and created to be the least disruptive to their

## Visitor Economy opportunities and challenges

The development of tourism products and experiences discussed within the Nelson Tasman Destination Management Plan 2021-2026 aligns with the Te Taihū Intergenerational Strategy 2020 which highlights further development of Māori tourism experiences across the region. The Strategy recommends the initiation of a Māori tourism strategy to facilitate and enable new iwi-based business, partnerships and co-investment opportunities.

In addition, the Destination Management Plan recommends further food and beverage and arts and creative development across the region and to support business cases for new and vibrant visitor experiences. The opportunities for new visitor experiences will have a flow on effect with increased demand for labour. There are also a number of major events forecast over the next five years that will stimulate demand for the region and will require additional labour supply. Events are year-round and are effective in filling the troughs in demand. There are over twenty events scheduled in the 2023/2024 year that require commercial accommodation for more than 100 people. There is also a wide calendar of other business and leisure events focused on the local market<sup>18</sup>.

The national Tourism Industry Transformation Plan<sup>19</sup> underpins government action for the visitor sector. The Plan identifies and reinforces the systemic challenges facing the sector workforce. The sector is composed of mostly small and medium sized enterprises. Some businesses lack the scale, systems and capacity to effectively

operations. The increasing demand for and development of micro-credentials and other short courses necessitates the development of these programmes by WDCs with associated government funding.

manage human resources and they struggle to attract and retain people with the skills the industry needs, particularly from the domestic workforce<sup>20</sup>. The hospitality sector and some of its subsectors, particularly restaurant, café operations, pubs and bars, are characterised globally by relatively high business and workforce churn and entry-level front-line roles that generally require no prior training. Other parts of hospitality such as hotel operations have clearly defined career progression particularly in the larger hotel brands.

Occupations in the tourism sector such as travel agents; tour, attraction and adventure operators and guides; wellness, cultural and culinary experiences; and event operators have varying requirements for training. Career progression is clearly delineated in some parts of the sector. Travel agents require qualifications to manage compliance and international rules and obligations. Outdoor adventure companies must manage health and safety and pre-employment guide training is the norm.

The first phase of implementing the national Tourism Transformation Plan is a Tourism and Hospitality Accord outlined in 'The Better Work Action Plan', which will set voluntary employment standards for businesses and drive transparency and awareness of workplace practices and standards. This will enable both workers and consumers to identify businesses that meet standards relating to decent pay, appropriate training and career progression, and a safe and supportive work environment.

## Visitor Economy regional actions

Priorities 2023-2024		Priorities 2024-2025	
<b>Action</b>	Create the framework for collaboration that will provide a critical feedback loop to help guide industry progression.	<b>Action</b>	Strengthen the profile of the industry to address visitor economy skills shortages.
<b>Activities</b>	<p>Create a working group of regional stakeholders to support national leadership initiatives that focus on increasing the sustainability of the sector: Tourism Industry Transformation Plan; Better Work Action Plan; Tourism and Hospitality Accord.</p> <p>The working group will facilitate and champion the following activities:</p> <ul style="list-style-type: none"> <li>» Coordinate action to positively impact perceptions of a career in tourism where people can develop valuable transferable skills.</li> <li>» Support the delivery of the new NCEA Tourism Achievement Standards at NCEA Levels 2 and 3 at the region’s secondary schools.</li> <li>» Stimulate action with employers to implement the Tourism and Hospitality Accord to foster staff retention. Showcase and promote best practice actions in staff management.</li> <li>» Foster events sector development with the pipeline of events planned for the region to meet the demand for suitably qualified staff for the event sector.</li> <li>» Target TEC, Ringa Hora and Te Pūkenga to ensure that events training is available for the region and awareness of training options is highlighted and promoted.</li> </ul> <p><i>Suggested Partners include: NRDA, SPICE, Chamber of Commerce, Industry Associations: Restaurant Association, Hospitality NZ, Te Pūkenga, Tourism and Hospitality Businesses, Secondary Schools Tourism Educators</i></p>	<b>Activities</b>	<p>Continue the working group activity to enhance the perceptions of employment in the sector and the effective recruitment and retention of employees (group to include Arts and Creative Lead, and Culinary Leads).</p> <p>Champion the actions within the Nelson Tasman Destination Management Plan to support new jobs within the region’s visitor economy, reduce the seasonality of the sector and create more meaningful employment: food and beverage and arts and creative initiatives and events.</p>
		<b>Action</b>	Advocate for Māori tourism development and support Māori tourism businesses.
		<b>Activities</b>	<p>Foster regional Māori tourism development initiatives. Advocate for funding and support to Māori tourism businesses. Showcase these developments.</p> <p><i>Suggested Lead and Partners: Iwi, Wakatu Inc, Toiere Māori Business Network, Chamber of Commerce, Māori Tourism operators, Te Puni Kōkiri, NZ Māori Tourism</i></p>





## Forestry and Wood Processing

Our region has a competitive advantage in forestry and logging, sawmilling, and forestry support services, making us a potential leader in our ability to add value in forestry and wood processing. Nelson Tasman is home to one of the largest MDF plants in the world and New Zealand's highest concentration of specialist wood processing, particularly in laminated and structural wood products and glues used in these production processes.

The national [Forestry and Wood Processing Industry Transformation Plan](#) released in November 2022 and quoted below, highlights the importance of the sector workforce in achieving the proposed actions. These actions aim to increase New Zealand's onshore wood processing capacity and capability, maximise the value of our wood, and drive innovation through developing new industries, products, technologies, and markets.

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*“Transformation (of the Forestry and Wood Processing sector) will require a greater level of collaboration across the sector, the right skills, the right regulatory settings and the science system all working in concert, to create more higher-paid jobs, build resilience in the sector and support our climate change goals. As the benefits of transformation are fully realised, our regional communities will have access to high wage jobs, a more diverse range of work through training opportunities ... moving from volume to value, and developing a high wage, low emissions economy.”*

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### Forestry and Wood Processing opportunities and challenges

The Forestry and Wood Processing sector accounts for more than 2,000 jobs in Nelson Tasman, or 3.6% of employment, compared to a 1.3% share nationally. Around 5% of the nation's standing volume of plantation forests is in our region. The Nelson Tasman Regeneration Plan names forestry and wood processing as a key economic driver. NRDA also notes the potential of the sector to lift productivity, and therefore regional outcomes and wages<sup>21</sup>.

Nationally, the forestry and wood processing sector is experiencing a range of long-term

strategic challenges and opportunities<sup>22</sup>. The volume of logs harvested has roughly doubled since the year 2000, although the overall harvest volume is expected to decline due to a reduction in planting since the boom of the 1990s. Over the same timeframe, wood processing capacity has not grown. There are missed opportunities to maximise the value of creating finished wood products in New Zealand, with most logs being exported offshore. Global demand for wood is expected to quadruple by 2050.

**Table 2: Components of the Forestry and Wood Processing Sector**

Sub-Industry	Nelson Tasman						New Zealand		
	GDP		Employment		Businesses		GDP	Employment	Businesses
	Level	% of total	Level	% of total	Level	% of total	% of total	% of total	% of total
Logging	\$43.9m	25.1%	411	20.0%	30	7.9%	32.9%	14.9%	10.0%
Log Sawmilling	\$36.9m	21.1%	469	22.9%	18	4.8%	11.6%	17.4%	3.9%
Reconstituted Wood Product Manufacturing	\$26.2m	15.0%	318	15.5%	6	1.6%	2.1%	3.2%	0.3%
Wooden Structural Fittings & Components Manufacturing	\$17.3m	9.9%	245	12.0%	27	7.1%	15.7%	23.4%	12.6%
Forestry	\$14.1m	8.1%	130	6.3%	228	60.3%	14.6%	6.6%	53.2%
Timber Wholesaling	\$12.9m	7.4%	119	5.8%	9	2.4%	4.7%	5.1%	3.4%
Forestry Support Services	\$11.2m	6.4%	193	9.4%	33	8.7%	6.6%	12.0%	8.2%
Timber Resawing & Dressing	\$8.60m	4.9%	110	5.4%	9	2.4%	3.7%	5.5%	1.5%
Other Wood Product Manufacturing n.e.c.	\$1.92m	1.1%	26	1.3%	9	2.4%	4.5%	6.7%	5.1%
Prefabricated Wooden Building Manufacturing	\$1.65m	0.9%	22	1.1%	9	2.4%	1.1%	1.6%	1.5%
Veneer & Plywood Manufacturing	\$0.40m	0.2%	6	0.3%	0	0.0%	2.3%	3.5%	0.3%
Wood Chipping	\$0.00m	0.0%	0	0.0%	0	0.0%	0.1%	0.1%	0.2%
<b>Total</b>	<b>\$175m</b>		<b>2,049</b>		<b>378</b>				

Source: Draft NRDA Forestry and Wood Processing Sector Profile, January 2023 (unpublished)

The forestry workforce is experiencing significant changes in the type and nature of the work, with an accompanying shift in the type of skills and knowledge required to do the job. Entry into forestry management generally requires a degree-level qualification, while mechanisation of harvesting practices has seen workforce changes from physically wielding chainsaws to sitting in a cab operating million-dollar machines. Corresponding changes in business models include a division between land ownership and forestry ownership; sub-contracting; part ownership of logging crews; and machine sharing<sup>23</sup>.

The wood processing sector has also seen changes in workforce skills and experience, including increasing requirements for digital skills and the operation and maintenance of what are often bespoke pieces of machinery developed by individual processing businesses. Additional challenges include an ageing workforce with 41.6% aged 45-64 years, higher than all other industry workforces in New Zealand. One in five workers in this sector have no formal qualifications and 28%

of employees are labourers compared to 10.7% for all industries.

Logging, sawmilling and wood product manufacturing are all forecast to have critical workforce shortages by the year 2028. Attraction challenges include rural depopulation and perceptions of the work being unsafe and physically demanding.

The forestry industry has some well-developed career pathway information, but there is a lack of education around the opportunities and types of jobs in the wood processing sector. This makes it harder to attract younger workers and retain older workers. Employers require support and education about how to actively retain their older workers, including upskilling opportunities and reshaping of roles. Diversity is a challenge for the sector - it is dominated by male workers (82%) compared to the national male labour force (52%). Māori workers are overrepresented in lower wage roles. Leadership positions tend to be occupied by Pākehā men, with women, Māori and other ethnicities underrepresented.

Despite the challenges the industry faces nationally, Nelson Tasman has the highest employment by region in the specialist manufacturing sector. There is significant potential for commercial uses of engineered wood products in the construction sector - Nelson's airport terminal showcases this use. There are further

opportunities for wood product manufacturing to capitalise on demand for housing and sustainable building practices. Nelson Tasman also has the highest number of scientists per capita in New Zealand, providing significant sector opportunities to add value to our logs<sup>24</sup>.



## Forestry and Wood Processing regional actions

Priorities 2023-2024		Priorities 2024-2025	
<b>Action</b>	Establish a framework for collaboration across the Nelson Tasman forestry and wood processing sector, to enable a collective response to the economic development opportunities and workforce planning requirements.	<b>Action</b>	In partnership with NRDA build on the framework for collaboration that has been established.
<b>Activities</b>	<ul style="list-style-type: none"> <li>» Acknowledge the partnership between NRDA and RSLG in working together to advance our respective objectives - economic development and workforce planning and development - for the forestry and wood processing sector.</li> <li>» With NRDA, explore establishing a potential collaboration with two groups of key regional businesses:               <ul style="list-style-type: none"> <li>○ Forestry (including forestry management, silviculture and harvesting)</li> <li>○ Wood Processing (including solid wood manufacturing, and wood panel and plywood).</li> </ul> </li> <li>» Inform both sector groups' understanding of the workforce planning necessary to achieve their economic development objectives.</li> <li>» Provide support for regional applications for the government's <u>Wood Processing Growth Fund</u> aiming to increase productivity and volume of domestic processing of wood, and boosting high value, high wage jobs.</li> </ul>	<b>Activities</b>	<ul style="list-style-type: none"> <li>» Expand the concept of collective action to guide and coordinate development of a shared workforce planning capability across the forestry and wood processing sectors in Nelson Tasman.</li> <li>» Share examples of good practice and knowledge regarding workforce planning and development approaches (noting this includes actions to increase regional awareness of career pathways, opportunities and employment in the forestry and wood processing sector).</li> <li>» Encourage collaboration between these regional groups and the relevant WDCs to make sure the regional voice of industry is heard and WDCs engage in supporting the workforce planning and development.</li> </ul>



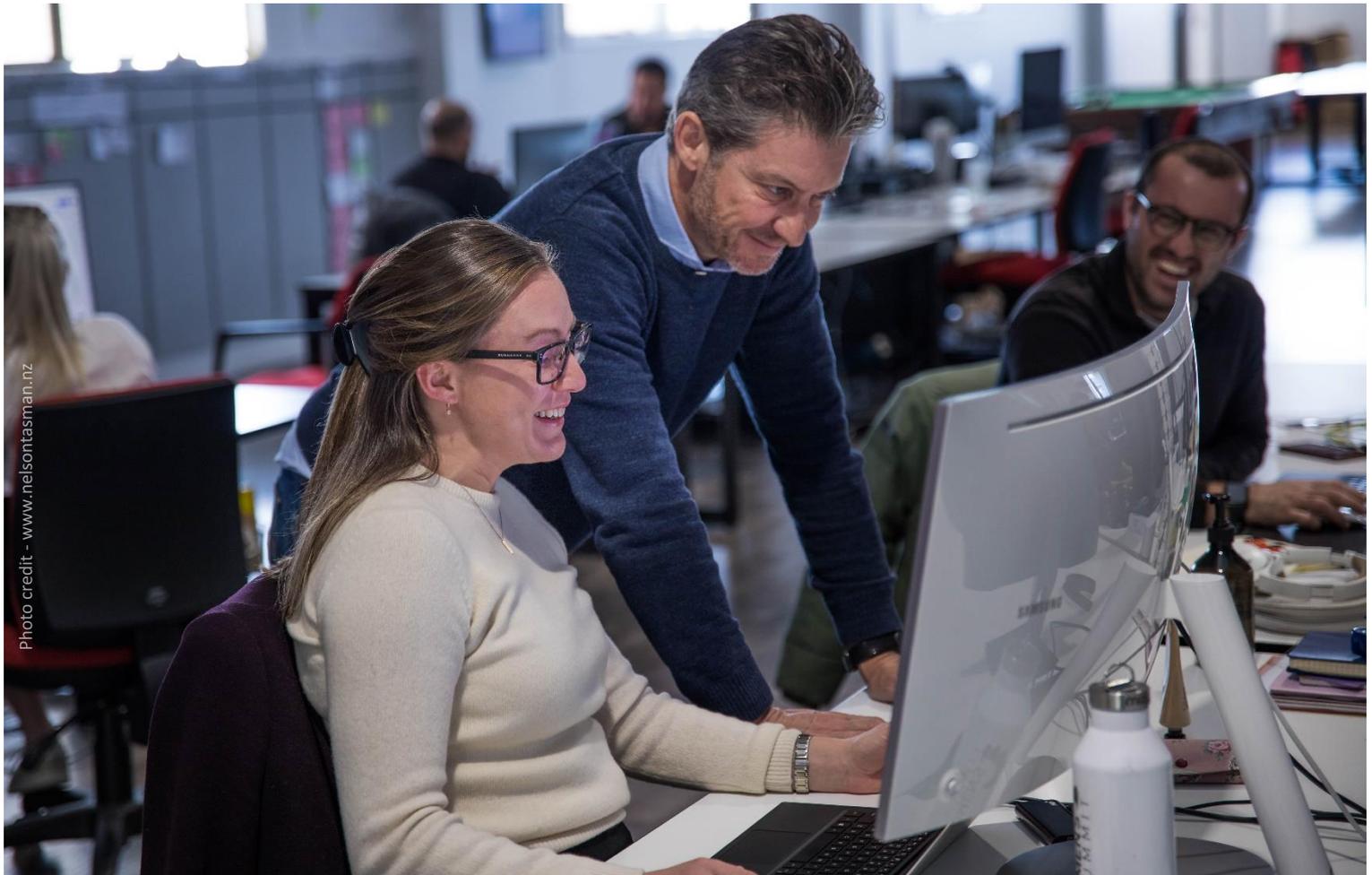
## Tō mātou arotahinga mō te tau e heke mai ana | Our focus for the next year

Over the next 12 months we will continue to work on some of the actions that we started this year. For more detail see the section on [progress updates on our focus areas and sectors](#).

The new regional actions we will focus on this year are those we have not yet started and include our two new sectors – Forestry and Wood Processing and the Visitor Economy.

In delivering these regional actions, we will maximise the opportunities for partnership with Te Taihū iwi and support the aspirations of the Māori workforce, advocating for Mā Māori, Mō Māori, ki a Māori solutions to workforce and skills issues.

We note the connections to [Te Taihū Intergenerational Strategy](#), specifically:





## Aquaculture

Our focus	Regional actions
<p>Continue working in partnership to advance priority actions in the National Aquaculture Workforce Plan</p>	<p>Support the implementation of the National Aquaculture Workforce Plan, including:</p> <ul style="list-style-type: none"> <li>» <b>Projection workstream:</b> gathering current and future workforce data to inform our national and regional advice regarding future training and skills development</li> <li>» <b>Perceptions and Pathways workstreams:</b> supporting the promotion of aquaculture related careers and training opportunities in our region</li> </ul> <p>Establish a regular national RSLG forum with a focus on aquaculture workforce development, to share information and collaborate in the provision of advice.</p>



## Construction

Our focus	Regional actions
<p>Maximise the opportunity of regionally planned construction and infrastructure</p>	<p>Advocate for and support the delivery of a regional construction coalition to establish construction skills pipelines.</p> <p>This includes continuing to strengthen access to allied trades training and promoting training and skills development in construction and infrastructure roles.</p>



## Forestry and Wood Processing

Our focus	Regional actions
<p>Establish a framework for collaboration across the region's forestry and wood processing sector, to enable a collective response to the economic development opportunities and workforce planning requirements</p>	<p>Acknowledge the partnership between NRDA and RSLG in working together to advance our respective objectives - economic development and workforce planning and development - for the forestry and wood processing sector.</p> <p>With NRDA explore establishing a potential collaboration with two groups of key regional businesses:</p> <ul style="list-style-type: none"> <li>» Forestry (including forestry management, silviculture and harvesting)</li> <li>» Wood Processing (including solid wood manufacturing, and wood panel and plywood).</li> </ul> <p>Inform both sector groups' understanding of the workforce planning necessary to achieve their economic development objectives.</p> <p>Provide support for regional applications for the government's <u>Wood Processing Growth Fund</u> aiming to increase productivity and volume of domestic processing of wood and boosting high value, high wage jobs.</p>



## Visitor Sector

Our focus	Regional actions
<p>Create the framework for collaboration that will provide a critical feedback loop to help guide industry progression</p>	<p>Create a working group of regional stakeholders to support national leadership initiatives that focus on increasing the sustainability of the sector: Tourism Industry Transformation Plan; Better Work Action Plan; Tourism and Hospitality Accord. The working group will facilitate and champion the following activities:</p> <ul style="list-style-type: none"> <li>» Coordinate action to positively impact perceptions of a career in tourism where people can develop valuable transferable skills.</li> <li>» Support the delivery of the new NCEA Tourism Achievement Standards at NCEA levels 2 and 3 at the region’s secondary schools.</li> <li>» Stimulate action with employers to implement the Tourism and Hospitality Accord to foster staff retention. Showcase and promote best practice actions in staff management.</li> <li>» Foster events sector development with the pipeline of events planned for the region to meet the demand for suitably qualified staff for the event sector.</li> <li>» Target TEC, Ringa Hora and Te Pūkenga to ensure that events training is available for the region and awareness of training options is highlighted and promoted.</li> </ul>



## Older Workers

Our focus	Regional actions
<p>Increase our shared understanding of our region’s older workers and their aspirations</p>	<p>Share data and insights regarding the region’s older workers, including regularly sharing the demographic related regional workforce data.</p> <p>Showcase examples of employers supporting the attraction and retention of older workers within the region, with a spotlight on our focus sectors.</p>



## Rangatahi

Our focus	Regional actions
<p>Rangatahi better understand our regional industries, the roles within those industries, and the opportunities available in Nelson Tasman</p>	<p>Increase the awareness of training options and career paths for rangatahi that enable them to stay in or return to our region. This includes improving the connections between our regional industries, employers and secondary schools.</p>

## Ngā matea pūkenga ā-rohe – he kupu | Regional skills needs – TEC advice

In May 2023 the RSLG provided advice to the TEC to help guide their investment process and decisions for 2024 funding for the Nelson Tasman region.

To shape our recommendations, we consulted a wide cross section of stakeholders including key regional industry employers, tertiary education organisations, WDCs, central and local government, Māori/iwi, unions, and other key community representatives. Similar issues were raised in almost every conversation, summarised in the overarching advice below. The sector and demographic advice reinforce training and skill needs in the priority sectors, industries and demographic groups identified in our RWP 2022 as well as the two new sectors - Visitor Sector and Forestry and Wood processing.

### Our overarching advice

Desired Outcome	Recommended Action
Joined up regional workforce data	TEC lead a collective approach to deliver regional workforce and learner data and evidence for each of the 15 RSLG regions, developing data sets with other relevant agencies (eg, MBIE; MSD; MoE and WDCs). This should include strengthening provision of iwi/Māori data.
Strengthened cultural capability and capacity	TEC identify and fund Mā Māori Mō Māori, ki a Māori solutions to build Māori cultural capability and capacity for both learners and educators.
Ongoing access to strategically important learning	TEC ensure additional funding support for delivery of courses strategically important to regions, where low learner numbers mean delivery is financially non-viable for providers.
Leadership and management capability development at all levels	TEC fund upskilling and reskilling for regional industries, with a priority focus on middle level managers.
Digital and technology skills development for workers of all ages	TEC fund digital and technology skills development at all levels to support adoption of technology and continuous improvement.
Alignment with industry needs for upskilling and reskilling with flexible and portable learning and credentials	TEC fund flexible and nimble delivery of niche programmes using stackable skills recognition eg, micro-credentials.
Skills that support sustainable practices for business	TEC prioritise access for current and future workforces to upskill and reskill regarding design, planning, and working in ways that eliminate waste and pollution, circulate products and materials, and regenerate nature.
Careers advice and support that enhances attraction and retention of skilled workers of all ages	TEC invest in regional careers systems to better support relationships between careers education and regional industry and organisations.

## Our advice specific to sectors

### Aquaculture

- » Maintain access to and provision of all education and training essential to the aquaculture sector, including:
  - aquaculture specific Level 3 and 4 certificates, degree in aquaculture and marine conservation, and post-graduate study in aquaculture
  - role-specific skipper, deckhand, boat master, radio operator, diving, fish farming, seafood processing, and aquaculture technician
  - generic first aid, health and safety, and confined space training.
- » Fund and support aquaculture apprenticeships (Hatchery, Fish and Shellfish).
- » Fund and support engineering and automation skills needed by the aquaculture sector.
- » Address the need for training to support entry level employees in a primary products food processing operation, ensuring they have the skills and knowledge to work in a laboratory, environmental or product quality role.
- » Consider supporting the development of a partnership between research institutes and Te Pūkenga focused on industry hubs in Tai Tokerau, Bay of Plenty, Te Taihū and Murihiku.

### Construction

- » Encourage continuity of provision by continuing to fund the full suite of trades training and pre-employment provision in the region, including foundation skills; pre-employment/first year of apprenticeship; remaining apprenticeship years.
- » Increase student numbers and ring fence to ensure training volumes reflect current and forecast construction workforce demand, including:
  - continuity of learning for those already in the apprenticeship system
  - broadening access to a wider range of allied trades.
- » Investigate alternative approaches to work based training delivery, including a 'group training' approach as offered by some providers.
- » Support access to leadership/supervisory training for final year apprentices and those who have completed their training.
- » Acknowledge and address the need for training for skilled trades assistants, noting engineering firms require this role/skill set when working on large projects.

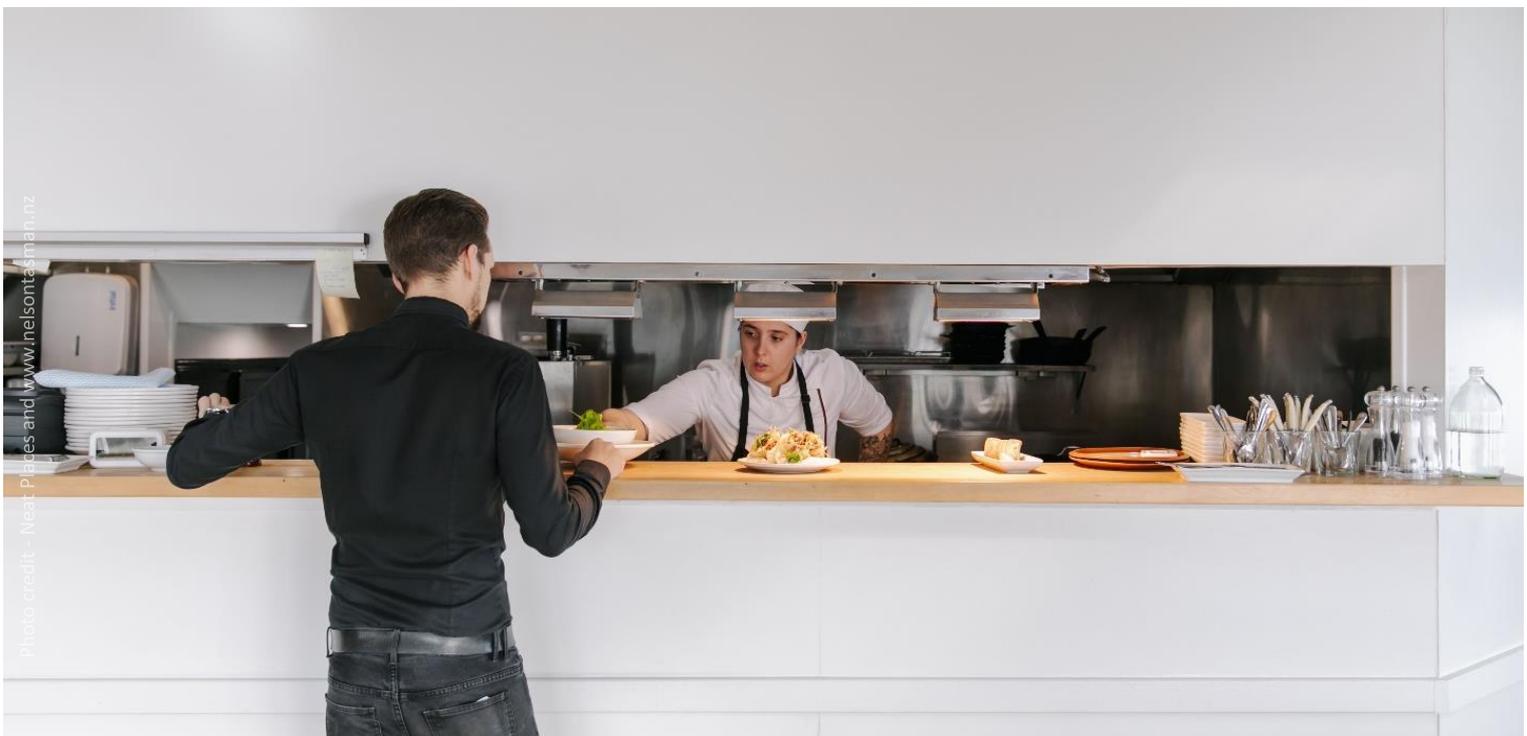


## Forestry and Wood Processing

- » Maintain access to and provision of all forestry and silviculture education and training, including:
  - forestry specific industry foundation skills; Forest Harvesting Operations; Tree Felling and Clearing (non-production); Forestry Industry Operations (planning and management); Forestry Crew Management; Diploma in Forest Management
  - silviculture specific Level 3 and 4 qualifications
  - generic first aid, health and safety.
- » Maintain funding, access to and provision of all 23 qualifications, education and training essential to the wood processing sector, particularly those in the areas of solid wood, wood panel and plywood, and pulp and paper.
- » Maintain access to and provision of all apprenticeships essential to the wood processing sector.
- » Increase and coordinate regional vocational training regarding use of wood products for the Construction sector.
- » Fund and support engineering and automation skills needed by the forestry and wood processing sectors.

## Visitor Sector - Tourism/Accommodation and Food

- » Increase funding for tourism and hospitality education to enable the region to have the capacity to address the skills shortages and changing labour market requirements for multiskilled staff with transferable skills.
- » Require study options to be as flexible as possible, in both entry level roles and management level, to address the various needs of learners and employers whether in the workplace or campus based or both.
- » Fund team leadership and management training so managers are better equipped to coach and develop staff.
- » Fund 'shorter and sharper' courses in hospitality and management skill areas.
- » Robust funding of outdoor adventure guide training is required. Current TEC funding levels should be retained. There is a shortage of suitably trained outdoor adventure guides in the region. Training is particularly essential before they enter the workforce.
- » Fund the delivery of event training in the Nelson Tasman region to meet the demand for suitably qualified staff for forecast events and skills shortages for the event sector.
- » Provide targeted funding towards training and upskilling Māori tourism businesses to enable them to become self-sufficient and support capability building within regional Māori business networks.



## Our advice specific to demographic groups

### Older Workers

- » Specifically fund bespoke training and support that enables reskilling and upskilling for older workers (50 years plus), in recognition that they are a critical section of the workforce, and are a heterogeneous group with varying needs not easily met in standard training options.

This training and support should include:

- age-appropriate cohorts
- a focus on upskilling and reskilling.
- » Training and support for employers in job shaping to adapt their workplace and business practices, increasing their ability to attract and retain a wider range of workers.

### Rangatahi

- » Continue to fund existing entry level training provision in the Nelson Tasman region.
- » Increase access to industry related learning and standards by schools, trades academies and other foundation providers.
- » Increase funding for Trades Academies, working closely with MoE, in recognition of the regional growth in both student numbers and increasing costs (eg, transport).

- » Continue to offer and promote access to career development training and qualifications supporting career planning and development.
- » Identify and act to close gaps in pre-employment service offerings, including but not restricted to enabling access for rangatahi to:
  - a broad-based modularised Trades option covering a range of trades/allied trades
  - foundation level support for computer design/animation.



# Ngā kōrero ahunga whakamua mō ā mātou kaupapa hei arotahi me ngā rāngai | Progress updates on our focus areas and sectors

The [Nelson Tasman 2022 RWP](#) set out actions we will take to respond to our local labour market challenges and opportunities for two demographic groups and two sectors that have been our focus for the last year. This section provides a progress update on these actions and next steps. We have also been busy talking to stakeholders and collating information to include our two new sectors – Forestry and Wood Processing and Visitor Sector.

## Aquaculture

We have supported implementation of the following actions:

- » Projections work to forecast the scale and capability of the future aquaculture workforce to 2035.
- » Pathways and Promotion work to map existing roles and career pathways; the skills training and qualifications for those roles; and identify opportunities to promote them.
- » Work with Muka Tangata and Te Pūkenga to deliver updated and existing qualifications in ways that allow more people to participate.
- » Collaborate and coordinate nationally with other RSLG with regional aquaculture workforces.
- » Support NRDA in their work leading to the development of a Te Taihū Oceans Economy Strategy.
- » Partner with government and industry to develop and deliver a National Aquaculture Workforce Strategy and an agreed Workforce Action Plan.

### Key milestones and activities

Aquaculture NZ (AQNZ) published the National Aquaculture Workforce Strategy in October 2022.

Regular collaboration and information sharing between RSLG and aquaculture workforces has ensured a cohesive approach to national advice to TEC, with stronger partnerships between RSLG and central government such as MPI; MBIE Sector Workforce Engagement Programme (SWEP); Just Transitions; and with Muka Tangata and Hanga Aro Rau WDCs.

The RSLG connected SWEP with AQNZ to secure funding for AQNZ to coordinate a two-year implementation programme. Implementation of the Aquaculture Workforce Action Plan and the related RSLG actions are progressing at pace. Working groups with industry and government representation have been formed for the Perceptions and Projections workstreams. Work has begun to gather up-to-date data on the current workforce by workplace, providing regional level information. The first round of data is expected by June 2023.

NRDA successfully partnered with central government and local industry to fund and establish the new 'Moananui – Blue Economy Cluster' project. This project aims to accelerate the growth of ocean-related businesses, enhance Nelson Tasman regions competitive advantage overseas, create more jobs to boost the local economy, and focus efforts on low carbon, sustainable initiatives. We have supported them in this mahi.

### Next steps

Through regular information sharing across RSLGs we will develop coordinated national advice for training and development of the aquaculture workforce, based on our increased understanding of current and future workforce size and skills required to support industry productivity.

Continue working with NRDA and begin working with Moananui, specifically in understanding and promoting science related roles in the aquaculture and related processing sectors.

## Construction

We have supported implementation of the following actions:

- » Advocate for developing skills pipelines that support significant capital projects.
- » Support and increase trades promotions in schools.
- » Investigate opportunities for more allied trades training locally.

### Key milestones and activities

We connected with our partners to advocate for our regional construction sector. We are still working to help secure the investment needed to enable collective action. Work to develop a skills pipeline is ongoing.

Along with all eight iwi of Te Taihū, NRDA, Nelson Tasman Chamber of Commerce, Te Pūkenga and WDC, we supported a regional bid to MSD in July 2022 for a Te Taihū Job and Skills Hub. The proposal was reshaped in October 2022 to focus on seeking the specific MSD Jobs and Skills Hub product for the Nelson Tasman region. Although the funding proposal was not approved, we were able to collectively investigate and better understand projected labour needs within the construction sector and related industries.

To provide more regional allied trades training, we engaged with Etco (electricity trades training including plumbing and drain laying) to support them finding facilities to run classes for their apprentices, and to champion their plan to establish a permanent regional training centre.

We continue to work with Top of the South Trades Academy supporting Trades in schools, contributing a strategic overview in our engagement with both Waihangā Ara Rau and Hanga Aro Rau WDCs. We continue to promote strategic engagement by partnering with others to bring schools and industry together in a Pathways Leadership Breakfast event (see Rangatahi section).

### Next steps

A construction skills pipeline remains a focus. We are currently seeking ways to secure investment to support our desired collective approach.

We will continue to support Etco to deliver electrical, plumbing and drain laying trades training in the region.

To maximise the opportunity of social procurement for government funded capital projects, we will continue to build on relationships with SWEP and Te Puni Kōkiri while partnering Waihangā Ara Rau and Hanga Aro Rau WDCs to strengthen skills pathways in construction.

We will identify, foster, and develop partnerships between industry and schools generated from the June 2023 Pathways Leadership Breakfast.



## Forestry and Wood Processing

- » To collate and develop information to understand regional need/engage with industry and develop priority workforce actions for inclusion in the RWP 2023.

### Key activities

We supported NRDA to develop a regional submission to the national Forestry and Wood Processing Industry Transformation Plan, working closely with Muka Tangata and Hanga Aro Rau.

We met with a range of local businesses and developed a summary of the workforce challenges and opportunities in the forestry and wood processing sectors. We agreed on a set of regional actions to be delivered over the next two years.

In April 2023 we provided regional advice to TEC about vocational education and training for this sector.

## Visitor Sector

- » To collate and develop information to understand regional need, engage with our Visitor Sector employers and develop priority workforce development actions for inclusion as a new sector in the 2023 Regional Workforce Plan.

### Key activities

We led the development of a regional submission to the government's Tourism Industry Transformation Plan, working closely with Ringa Hora WDC.

In our December 2022 Local Insights Report we noted the workforce constraints that were being felt in the region's tourism and hospitality sectors, with some businesses reducing their service offering due to staff shortages.

In early 2023 we developed a summary of the workforce challenges and opportunities in the Visitor Sector and agreed on a set of regional actions to be delivered over the next two years.

In April 2023 we provided regional advice to TEC about vocational education and training for this sector.



## Older Workers

- » Establish and lead a central and local government subgroup to collaborate in supporting older workers to participate in our region's economy.
- » Explore micro-credentials and other training to support older workers to reskill and upskill.
- » Collaborate to develop and deliver projects that support employers to attract and retain older workers, including showcasing successful examples.

### Key milestones and activities

We established a subgroup of central and local government, and regional business members to collaborate in supporting older workers to participate in our region's economy. The terms of reference and a provisional action plan to deliver a two-year programme relating to the RSLG eight regional actions regarding older workers have been developed.

We supported a successful bid for a pilot funded by the Office for Seniors to support senior entrepreneurs. The pilot is now underway in Nelson Tasman. Developed and managed by the Nelson Chamber of Commerce supported by Nelson City Council, with Business Assist and Age Concern, the pilot is called 'Primetime'. It aims to work with up to 16 individuals, supporting them via a mix of training and mentoring as they establish/start up a business. In addition to supporting older workers in entrepreneurial activity, the project will gather valuable insights to inform workers and employers in ways to attract and retain older workers in the Nelson Tasman workforce.

We worked with the WDC and provided recommendations to TEC to explore and develop micro-credentials for supporting older workers to reskill and upskill.

### Next steps

Finalise activities to further deliver all eight regional actions over the next two years, and report on progress to change behaviour and perceptions to maximise the contribution of older workers.

Continue to develop a relationship with MPI and Workbridge as they deliver the Primary Partnership programme, including sharing their successes in job shaping, reskilling, upskilling and retention.



## Rangatahi

- » Work alongside and support regional youth-based organisations, such as the Nelson Tasman Youth Workers Collective, to collate better data on our rangatahi.
- » Ensure increased awareness of training options and career paths for our rangatahi that enable them to stay in or return to our region, including improving the connections between our regional industries and employers and our secondary schools.

### Key milestones and activities

We established a working relationship with the Nelson Tasman Youth Workers Collective and supported funding applications to enable them to continue their work in sharing information and building a collective approach to supporting our region's rangatahi.

We researched opportunities and barriers for rangatahi as they transition from education to vocational training and employment via discussion with the Nelson Tasman Youth Workers Collective and a small online survey.

We are continuing to work with Pathway Navigator partners to support the continuation of the programme in some of our secondary schools. This programme is developed and funded by the regional MoE office, Nelson City Council, and Tasman District Council. It targets 16–18-year-olds who have stopped attending school and supports them and their whanau to develop and implement a plan to transition into vocational education, employment, or other learning.

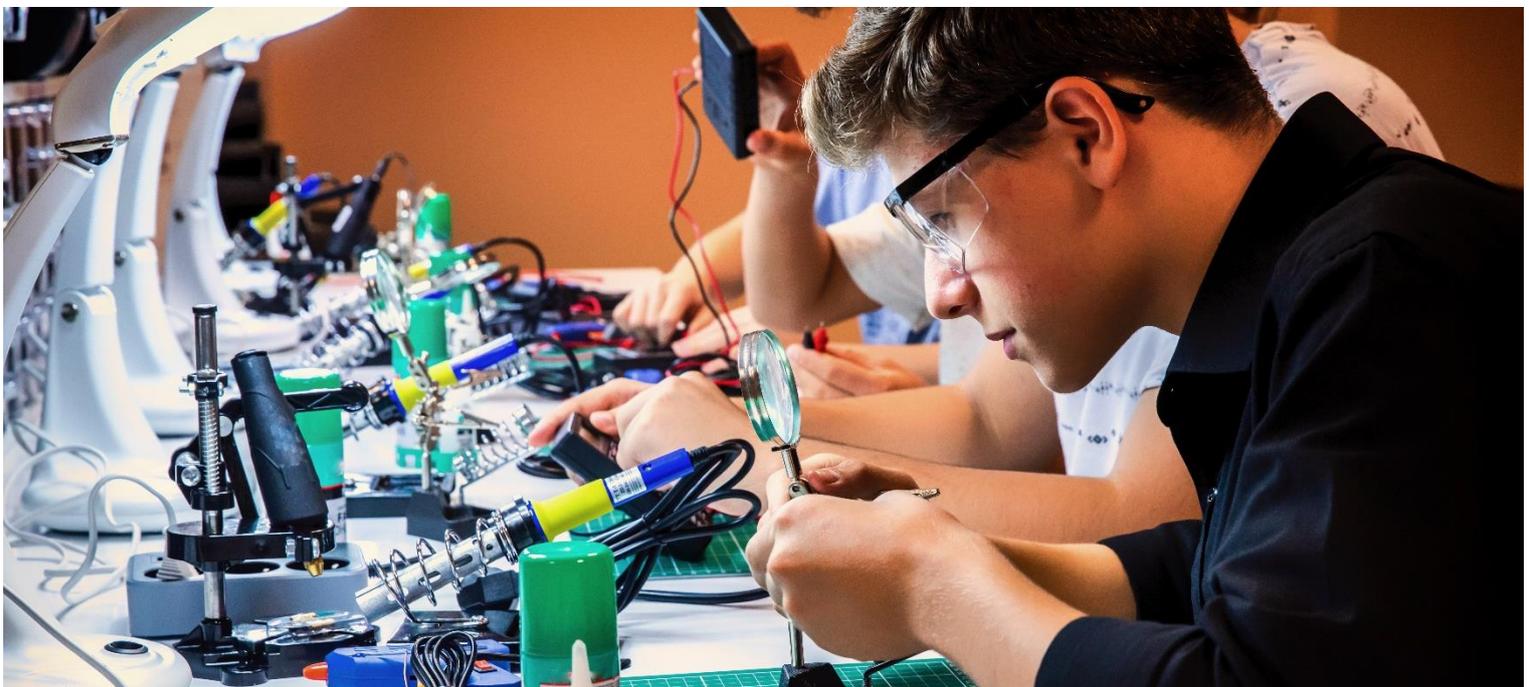
In April 2023 we provided regional advice to TEC about vocational education and training for rangatahi.

### Next steps

Engage with agencies supporting rangatahi to collect better data regarding transition from education to the workforce.

Continue our partnerships with CATE, MoE, the Pathway Navigator Programme, and TEC to provide advice and support in developing effective regional careers information and transition support.

In July 2023 we will be partnering with the Nelson Tasman Chamber of Commerce, NRDA, MoE and CATE Nelson to deliver a Pathways Leadership Breakfast. The purpose of the event is to bring industry leaders and school leadership together to identify, discuss and create opportunities to connect local businesses with schools and school students. The event will also provide the opportunity to create follow up actions to enable better connections between industry and schools in our community.



## Ā mātou mema | Our members



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RSLG  
Nelson Tasman



**Justin Carter**  
Iwi Co-Chair,  
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**Arthur Graves**  
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**Sharon McGuire**  
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**Grahame Andrews**  
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- <sup>3</sup> Nelson-Tasman Regional Economic Briefing – 2022 data update, Benje Patterson, March 2023 (unpublished)
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- <sup>19</sup> Ministry of Business Innovation and Employment (2021) [Tourism Industry Transformation Plan](#)
- <sup>20</sup> Ministry of Business Innovation and Employment (2023) He Mahare Tiaki Kaimahi Better Work Action Plan, page 13
- <sup>21</sup> Nelson Tasman generated \$105,070 of GDP per filled job in 2022, less than the New Zealand average of \$132,815. Source: [Nelson Tasman Productivity Gap - 2022 supplementary update](#), Benje Patterson, People and Places, February 2023
- <sup>22</sup> Cabinet paper released under the OIA [‘Releasing the final Forestry and Wood Processing Industry Transformation Plan’](#)
- <sup>23</sup> Mike Fraser Logging [YouTube video](#) history of company, changes over time particularly in the last 30 years.
- <sup>24</sup> NRDA submission to MPI responding to consultation on the Draft Forestry Industry Transformation Plan 6 October 2022

