INDUSTRY PROFILE

Tranzqual Industries

Road Transport Warehousing & Logistics Passenger Services Stevedoring & Ports

Tranzqual ITO
SETTING TRANSPORT & LOGISTICS STANDARDS

INDUSTRY TRAINING FEDERATION
LEADING A SKILLED FUTURE

Industry Profile Report

Tranzqual ITO

This industry profile provides key data for industry sectors supported by Tranzqual ITO based on 2006 census data.

Tranzqual ITO is able to produce reports specific to our industries using Australian and New Zealand Standard Industrial Classifications codes (ANZSIC). This report includes data for the four industry sectors listed below.

I am pleased to share this report with Tranzqual ITO partners and stakeholders.

Please note the ANZSIC codes do not always align themselves precisely with our industry sector boundaries and some occupations in your industries may be supported by other ITOs.

If you have any questions regarding the following reports please contact Tranzqual's Research Manager. Call 0800 4QUALS (478257) or email kate.brazier@tranzqual.org.nz.

INDUSTRY SECTOR	SECTOR INDUSTRIES INCLUDED IN REPORT	NUMBER IN SECTOR	SECTOR CROSS REFERENCE
Road transport	Road Transport	22884	Includes 360 couriers
	Other Transport	1377	and 10,794 truck drivers
Warehousing and logistics	Warehousing and Logistics services	4290	Includes 1377 truck drivers
	Courier pick-up and storage services	5703	
	Other warehousing and storage services	5163	
Passenger services	Interurban and rural bus transport	1818	Includes 474 truck drivers
	Urban bus transport	3846	
	Taxi and other road transport	3507	
	Passenger car rental and hiring	2910	
	Other motor vehicle and transport equipment rental and hiring	1035	
	Scenic and sightseeing transport	1788	
	Other transport support services	2748	
Stevedoring and ports	Stevedoring services	963	Includes 69 truck drivers
	Port and water transport terminal operations	1920	
	Other water transport support services	864	

Wayne Smith
Chief Executive Officer

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Introduction

To understand the skill needs of an industry it is important to examine characteristics of the industry and how these compare to the New Zealand workforce as a whole. This provides the opportunity for more detailed future planning as well as highlighting challenges and opportunities for the industry.

This report examines a range of topics relating to the characteristics of workers and firms in Tranzqual industries. Topics have been chosen based on their relevance to industry development and skill and training needs as well as practical considerations about available data.

Topics have been grouped into seven sections in this report. The first section provides an overview of Tranzqual industries. The second examines the characteristics of people working in these industries. The third section focuses on qualifications of these workers. Fourthly, types of work and work conditions in the industries are examined. Firms are considered in the fifth section and the final two sections present possibilities for further investigation and where to find more information.

Each section is split into a number of subsections. Each subsection examines a particular topic such as wages, secondary qualifications, or firm size in detail.

Unless otherwise specified data reported is from Census 2006. The Census provides a very rich source of data as it covers the entire population and asks a range of questions. However, it should be kept in mind that this data is from a single point in time in March 2006 so industries may have changed in terms of worker numbers or characteristics since that time and also that Census data is entirely self-reported.

Further information about the topics covered in this report including detailed data can be obtained by contacting the Industry Training Federation.

An overview of Tranzqual industries

This section provides a high level overview of Tranzqual industries. This information is useful to get a general idea about ITO coverage and how this has changed over time. The variables covered in this section provide context for the variables covered in the rest of the report.

The industries, as defined for this report, are outlined in the first part of this section. This is particularly important as different people or groups can have very different understandings of what is included in an industry. This is followed by analysis of the number of workers and number of firms in the industries to give an idea of the size of the market. Finally, changes in worker and firm numbers over the past five years are examined to represent how the market is changing over time.

Defining Tranzqual industries

Industries in New Zealand and Australia are classified using the Australian and New Zealand Standard Industrial Classification (ANZSIC) 2006 . The Australian Bureau of Statistics and Statistics New Zealand jointly developed this classification to improve the comparability of industry statistics between the two countries and with the rest of the world. An individual business entity (or 'unit') is assigned to an industry based on its predominant activity. ANZSIC is hierarchical with four levels of classification. At the most detailed level, the class level, there are over 500 separate industry codes.

For the purposes of this report Tranzqual industries are defined as including the ANZSIC 2006 industries listed below. Further detail about the definitions of individual industries can be found in the ANZSIC 2006 Classifications booklet which is available from the Statistics NZ website. The number of workers from the 2006 Census in each included industry is also shown to give an idea of the relative size of the individual industries.

INDUSTRY	WORKERS
I462300 Taxi and Other Road Transport	3,507
I462200 Urban Bus Transport (Including Tramway)	3,846
I462100 Interurban and Rural Bus Transport	1,818
I461000 Road Freight Transport	22,884
I529200 Freight Forwarding Services	4,290
I521200 Port and Water Transport Terminal Operations	1,920
I521100 Stevedoring Services	963
I510200 Courier Pick-up and Delivery Services	5,703
L661900 Other Motor Vehicle and Transport Equipment Rental and Hiring	1,035
I502900 Other Transport n.e.c.	1,377
I529900 Other Transport Support Services n.e.c	2,748
I530900 Other Warehousing and Storage Services	5,163
I521900 Other Water Transport Support Services	864
L661100 Passenger Car Rental and Hiring	2,910
I501000 Scenic and Sightseeing Transport	1,788

Worker numbers

The number of workers is an important metric because it provides information about the number of people that might be affected by any changes to training or changes to industries more generally. While worker numbers is an important metric, other factors also contribute to an industry's 'importance'. Some very small industries are crucially important due to their economic, social or strategic value so size alone is not necessarily an indicator of potential gains to be made from upskilling.

There are several sources for the number of workers by industry, each of which may give different results but also can have particular advantages. Two sources that are commonly used are the Census and Business Demography. The Census has the advantage of covering all people and allows detailed breakdowns by other demographic variables, however, all data is self-reported and the Census is conducted only every five years. Business Demography does not allow such detailed analysis and relies on accurate reporting by firms but has the advantages of being produced annually and having a more reliable means of assigning workers to particular industries. Both sources are reported here to give a more complete picture of the available information and to enable industry to choose the most appropriate measure for their particular purposes. Information from the Census relates to March 2006 while information from Business Demography relates to February 2008.

At the time of the 2006 Census there were 60,816 people working in Tranzqual industries. This represents 3.06% of all people working in New Zealand (NZ).

The most up to date Business Demography data available relates to February 2008. At that time there were 62,380 people working in Tranzqual industries or 3.17% of all workers.

Characteristics of workers in Tranzqual industries are examined in more detail in sections two and three.

Questions to consider about number of workers:

- *How might the number of workers in the industry affect skill or training needs or how training can be delivered?*
- *What information is available about how the industry might change in the future and what impacts this might have on number of workers and their skill needs?*

Number of firms

The number of firms is important to consider as it provides a measure of the number of different workplaces people are working in and therefore gives an indication of the concentration of the industries. From a training point of view these factors can have an impact on the number of employers that ITOs have to work with, as well as the ways that training is targeted.

Information about firms is available from Statistics New Zealand's Business Demography data. This dataset includes all businesses that are considered to be 'economically significant'; in practical terms this includes all businesses that are GST registered or have annual sales or expenditure of at least $30,000. In this report firms that do not have any workers, such as registered businesses that are currently inactive, are excluded from analysis.

In February 2008 there were 4,757 businesses in Tranzqual industries. This represents 3.14% of all NZ businesses.

Characteristics of firms in Tranzqual industries are examined in more detail in section five.

Questions to consider about number of firms:

- *How might the number of firms in the industry affect skill or training needs or how training can be delivered?*
- *What information is available about how the industry might change in the future and what impacts this might have on number of firms?*

Growth in Tranzqual industries

Over time industries can grow or decline in terms of numbers of firms and workers. There are many reasons why growth or decline may occur, including prevailing economic conditions, changes in technology and a range of other reasons. Examining trends in the growth or decline of firms and workers in industries is useful as it may give insights into changes in the market, help project growth or decline, and inform the types of training needed. For example, rapidly expanding industries may need to invest primarily in training new workers with specific skills while industries experiencing declining numbers may need to focus on training existing workers in using new technologies or undertaking a wider range of activities.

Growth or decline in the number of workers gives an indication of whether total employment in an industry is increasing or decreasing. In the five years to February 2008 the number of workers in Tranzqual industries increased from 54,640 to 62,380, an increase of 14.2%. This rate of growth is the same as the rate of growth of 14.4% in the total number of NZ workers over the same period. This means that Tranzqual industries employed a similar share of all workers in 2008 and 2003.

Growth or decline in the number of firms can differ from the changes in worker numbers if firms are merging and becoming larger or if new smaller firms are being started, so it's important to also consider changes in the number of firms. In the five years to February 2008 the number of businesses in Tranzqual industries increased from 4,422 to 4,757, an increase of 7.6%. This rate of growth is marginally slower than the rate of growth of 10.6% in the total number of NZ businesses over the same period. This means that Tranzqual industries made up a smaller share of all businesses in 2008 than in 2003.

Questions to consider about industry growth:

- *How have changes to industry size over the past five years impacted on demand for skills and training?*
- *What have been the drivers of changes in industry size over recent years?*
- *How will growth over the next 5-10 years compare to over the past five years?*

Who is working in the industry?

This section examines the characteristics of people working in Tranzqual industries. The demographic information in this section is useful when considering skill needs, as different groups may have different needs or require different types of learning to maximise their potential in their industry. As people working in industries become increasingly diverse training also needs to be diverse to best meet the needs of these groups.

Considering industry demographics is particularly important in the face of the tight labour market that New Zealand has experienced over the past decade. While conditions may ease somewhat due to changes in the economy in the short term, both skills and labour are still likely to be in relatively short supply in the foreseeable future. With labour and skills in short supply industries need to consider how non-traditional labour sources or groups that have typically been under-represented can be better utilised. In addition, better understanding of future needs will assist with matching labour supply to labour demand which may help decrease the intensity of skill shortages.

Gender

The gender composition of industries is important to consider when thinking about the future and skill needs as demographic and social patterns change over time. For example, gender composition may have an impact on preferred hours of work or on preferred styles of learning.

Tranzqual industries have a considerably higher proportion of males than the average across the NZ workforce with 75.8% being male compared to 52.9% of the total workforce.

Questions to consider about gender:

- *If one gender is over-represented what underlying factors cause this? (For example- industry tradition, type of work, hours, etc.)*
- *If one gender is under-represented in the industry what, if anything, has been done to address this? If strategies have been put in place, have they been effective? And how might this impact on future industry composition?*
- *Does the gender of trainees in your industry reflect the gender composition of the industry? If not, what might cause the difference?*
- *How might the gender distribution of the industry affect skill or training needs or how training can be delivered?*

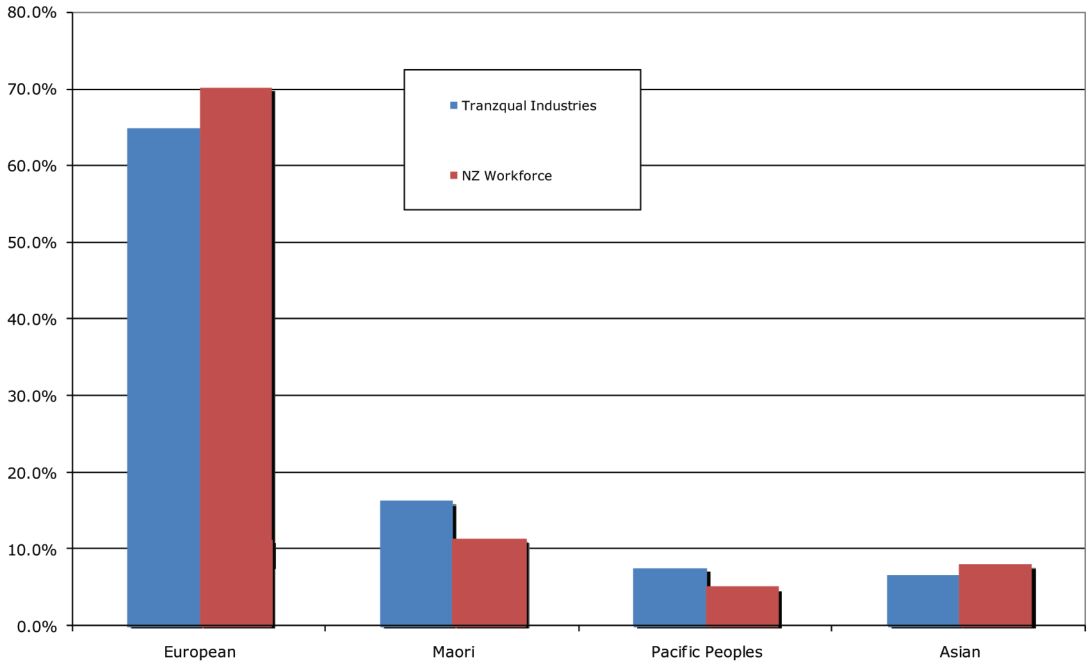
Ethnicity

Another factor that may impact on thinking about the future of the industries and skill needs is ethnic composition. It is particularly useful for planning given the changing ethnic composition of New Zealand with considerable growth expected in the Asian and Pacific Peoples ethnic groups in particular. This is also useful for creating targeted programmes, such as for marketing or engaging with stakeholders.

In Census 2006 people could identify as belonging to one or more of over 200 ethnic groups. As people can belong to more than one ethnic group the total responses add to more than 100%. This section focuses on four commonly identified groupings of ethnicities- European, Maori, Pacific Peoples and Asian.

In Tranzqual industries 65% of workers identify as European, 16.3% identify as Maori, 7.6% identify as Pacific Peoples and 6.6% identify as Asian, compared with the total NZ workforce where 70.3% identify as European, 11.4% identify as Maori, 5.1% identify as Pacific Peoples and 8.1% identify as Asian. Tranzqual industries have a higher proportion than the total NZ workforce for the Maori and Pacific Peoples ethnic groups but lower for the European and Asian ethnic groups. This is shown in figure 1 below.

Figure 1: The ethnic composition of Tranzqual industries compared to all industries



Source: 2006 Census of Population and Dwellings, Statistics New Zealand

Questions to consider about ethnicity:

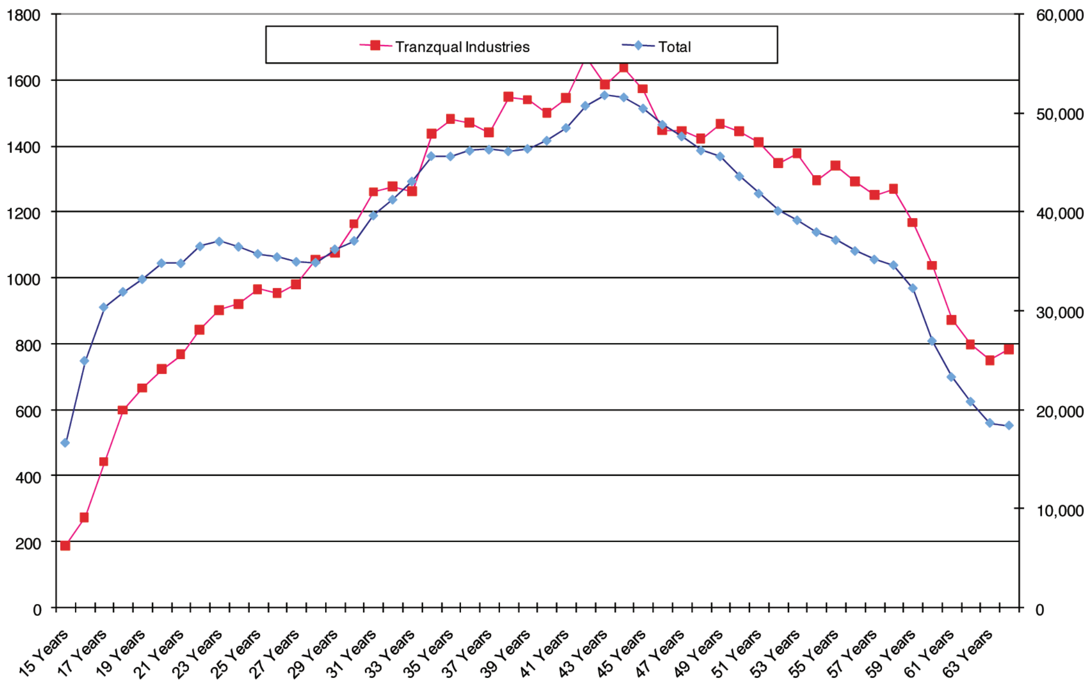
- *If the ethnic composition is different to the New Zealand mix what underlying factors cause this? (For example- industry tradition, type of work, hours, etc.)*
- *Will future changes to New Zealand's ethnic mix have any implications for the industry?*
- *If any ethnicities are under-represented in the industry what, if anything, has been done to address this? If strategies have been put in place, have they been effective? And how might this impact on future industry composition?*
- *Does the ethnic mix of trainees in your industry reflect the ethnic composition of the industry? If not, what might cause the difference?*
- *How might the ethnic distribution of the industry affect skill or training needs or how training is delivered?*

Age

The age distribution of an industry is an important demographic factor to consider for both the future of the industry and skill needs. Different age cohorts can have different learning needs that may impact on how training programmes are offered. For example, young workers may be more comfortable with new technologies while older workers may have extensive industry experience. The age profile is also important when thinking about retirement, industry succession planning and job design.

Tranzqual industries have a median age of 42, which is 2 years older than the median age across the NZ workforce. The largest differences in the age profile between Tranzqual industries and the NZ workforce as a whole are a higher proportion of people aged 55+ and a lower proportion of people aged 15-24. This is shown in figure 2 below.

Figure 2: The age distribution for workers aged 15-64 in Tranzqual industries compared to all industries



Source: 2006 Census of Population and Dwellings, Statistics New ZealandQuestions to consider about age:

Questions to consider about age:

- *If the age distribution is different to the NZ mix what underlying factors cause this? (For example- skills required, type of work, hours, etc.)*
- *Does the age profile of trainees in your industry reflect the age composition of the industry? If not, what might cause the difference?*
- *How might the age distribution of the industry affect skill or training needs or influence decisions about how training is delivered?*
- *Has the industry done anything to encourage people of different ages into the industry or to stay in the industry?*

Migrants

Migrants from overseas are important to the New Zealand labour market as they can provide an important source of labour, bring in needed skills and provide cultural diversity. Migrants make up nearly a quarter of the New Zealand labour market, a larger proportion than in many similar OECD countries. The prevalence of migrants in an industry is important to consider when thinking about training and skill needs as migrants may have different training needs such as adapting to New Zealand industry standards and requirements or language and cultural needs. The prevalence of overseas born workers also means that it is important to consider how overseas gained skill, experience and qualifications should or can be recognised.

Two factors that might influence the training needs of migrants are the length of time they have been in New Zealand and country of birth. Migrants who have been in New Zealand for shorter periods of time or are from non-English speaking countries are likely to have greater needs than migrants who have been in New Zealand for some time or who are from English speaking countries.

There are 11,487 workers in Tranzqual industries who were born overseas. These workers make up 18.9% of the industry, a smaller proportion than the national average of 23.6% of workers born overseas. Workers in Tranzqual industries who were born overseas have generally been in NZ for a slightly longer time, 24.4% have been in NZ for less than five years compared to 28.2% of all overseas born workers. A detailed breakdown of workers born overseas by length of time in NZ is shown in table 1 below.

Table 1: The length of time in NZ for overseas workers working in Tranzqual industries compared to all industries

TIME IN NZ	ROAD TRANSPORT	ALL NZ INDUSTRIES
<1 year	3.5%	4.9%
1-2 years	7.7%	10.5%
3-4 years	13.1%	12.8%
5-9 years	15.5%	16.6%
10+ years	60.1%	55.2%

Source: 2006 Census of Population and Dwellings, Statistics New Zealand

The most common countries of birth for overseas born workers in Tranzqual industries are shown in table 2 below. This table only shows the top 10 most common countries.

Table 2: The 10 most common countries of birth for overseas workers working in Tranzqual industries

COUNTRY OF BIRTH	NUMBER OF WORKERS	% OF ALL MIGRANTS IN THE INDUSTRY
England	2,295	20.0%
Samoa	1,458	12.7%
India	1,023	8.9%
Fiji	900	7.8%
Australia	693	6.0%
China, People's Republic of	465	4.0%
South Africa	438	3.8%
Scotland	402	3.5%
Tonga	294	2.6%
Cook Islands	291	2.5%

Source: 2006 Census of Population and Dwellings, Statistics New Zealand

Questions to consider about migrants:

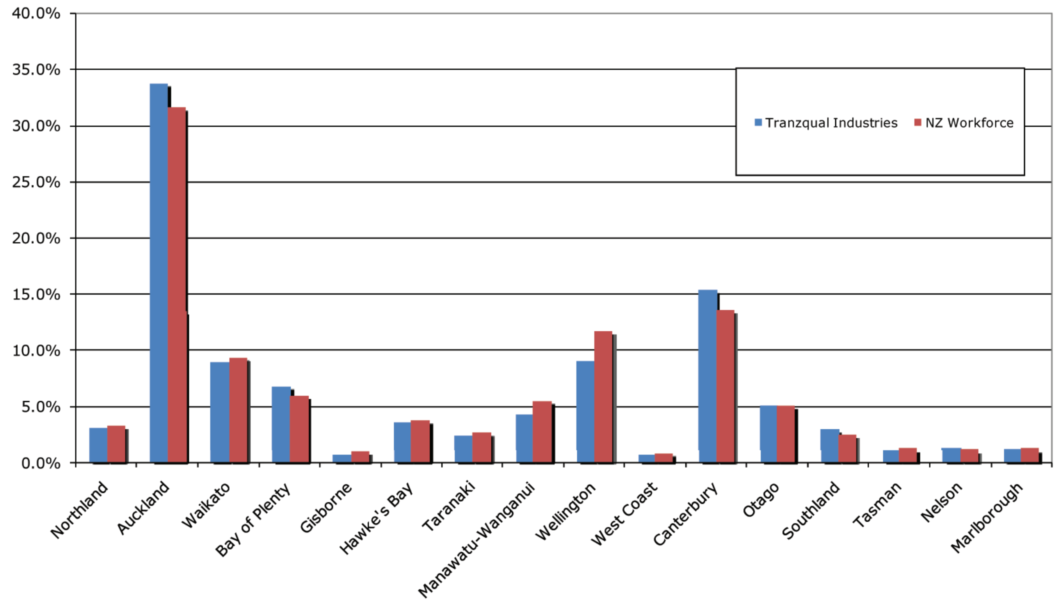
- *If the industry has a large proportion of migrants, what underlying factors cause this? (For example- skills required, type of work, hours, pay, etc.)*
- *Has the industry done anything to encourage migrants into the industry?*
- *How might the profile of migrants in terms of length of time in NZ or countries of birth of workers in the industry affect skill or training needs?*
- *Does the industry have any training tailored to or aimed specifically at migrants?*

Region

Some industries are spread across New Zealand while others are concentrated in a particular region or regions. The concentration of an industry may have an impact on how training is delivered and also on how resources are spread around the country. The particular regions where industries are located also has an impact on future planning as different regions are projected to grow and develop differently over time.

The regional council areas with the largest number of workers employed in Tranzqual industries are Auckland Region, Canterbury Region and Wellington Region. These regions employ 33.8%, 15.4% and 9% respectively of all workers in Tranzqual industries. The regional distribution for all regions is shown in figure 3 below. The regions where Tranzqual industries are most over-represented are Southland Region, Bay of Plenty Region and Canterbury Region.

Figure 3: The proportion of people working in Tranzqual industries by region compared to all industries



Source: 2006 Census of Population and Dwellings, Statistics New Zealand

Questions to consider about regional distribution:

- *If the regional distribution is different to that for all industries what underlying factors cause this? (For example- location of materials, type of work, commercial centres, urban/rural nature of industry, etc.)*
- *How might the regional distribution of the industry affect skill or training needs or how training is delivered?*

What skill levels do people in the industry have?

This section examines the skill levels of people working in Tranzqual industries. The current skills of workers are obviously very important to consider when thinking about future skill and training needs. Unfortunately, the skills of workers are very difficult to measure or quantify. One frequently used proxy for general skill level is level of qualification. Using qualifications as a proxy has some shortcomings including not capturing information about specific skills, skills that are not covered by formal qualifications, or the actual quality of skills, but can still provide a very useful indicator of the overall level of skill of workers.

Qualifications of workers in Tranzqual industries, as reported in the 2006 Census, provide an indication of the current skill level of the workforce as a whole. Census data about qualifications relates to both secondary and post-school qualifications. The current level of qualifications held by workers in an industry is important to take into account when considering skills and training needs. People with low or no qualifications may need different types of training and may have different learning needs than people with advanced qualifications. For example, people with few qualifications are likely to have greater literacy and numeracy needs. In addition, people with low or no qualifications, who may not have had positive education or training experiences in the past, may need more active support when undertaking training.

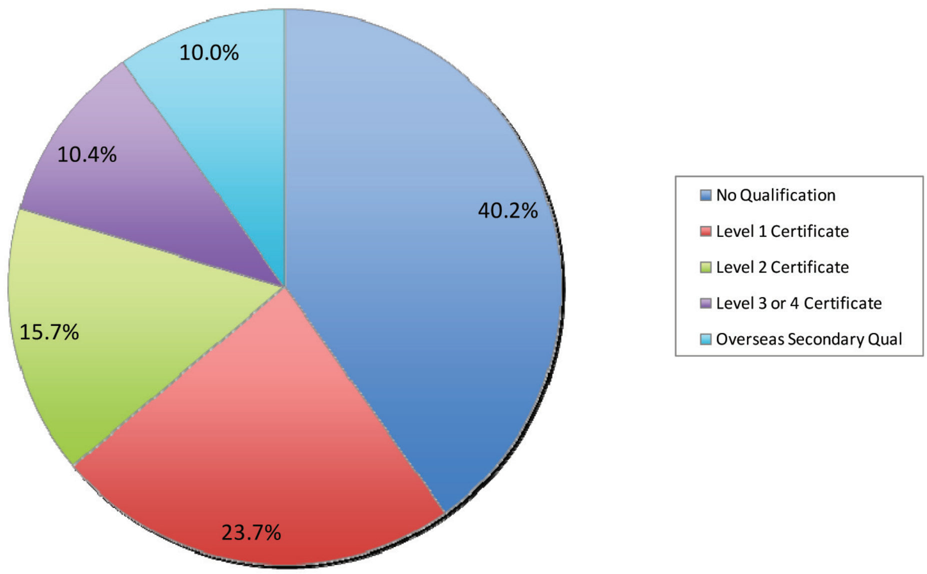
This section also includes two topics based on the 2006 Adult Literacy and Life Skills (ALL) Survey. The first contains information about the critical foundation skills of literacy and numeracy. Information about literacy and numeracy is crucial when considering skill and training needs for an industry as these skills provide the basis for other types of skill development. The second provides information about participation in upskilling. This measure is important because it gives an indication of the number of workers who are participating in further training. More information about the ALL survey is available from the Ministry of Education on the Education Counts website at: www.educationcounts.govt.nz/goto/all.

Secondary school qualifications

Secondary school qualifications are those gained while in secondary school- usually completed while a person is a teenager or young adult. Secondary qualifications are important to consider as they provide core skills and are often a basis for further learning. These qualifications are usually relatively general rather than focusing on a specific field. Information from the Census relates to all people aged 15 and over that were employed so includes young people who are employed but have not yet completed secondary school.

People working in Tranzqual industries on average have lower qualifications earned at secondary school than the average for all workers. In particular, 40.2% of workers in the industries have no formal secondary qualification compared to 25.1% of the total workforce while 10.4% have a level 3 or 4 Certificate compared to 19.7% of all workers.

Figure 4: The proportion of people working in Tranzqual industries by highest secondary qualification



Source: 2006 Census of Population and Dwellings, Statistics New Zealand

Questions to consider about secondary qualifications:

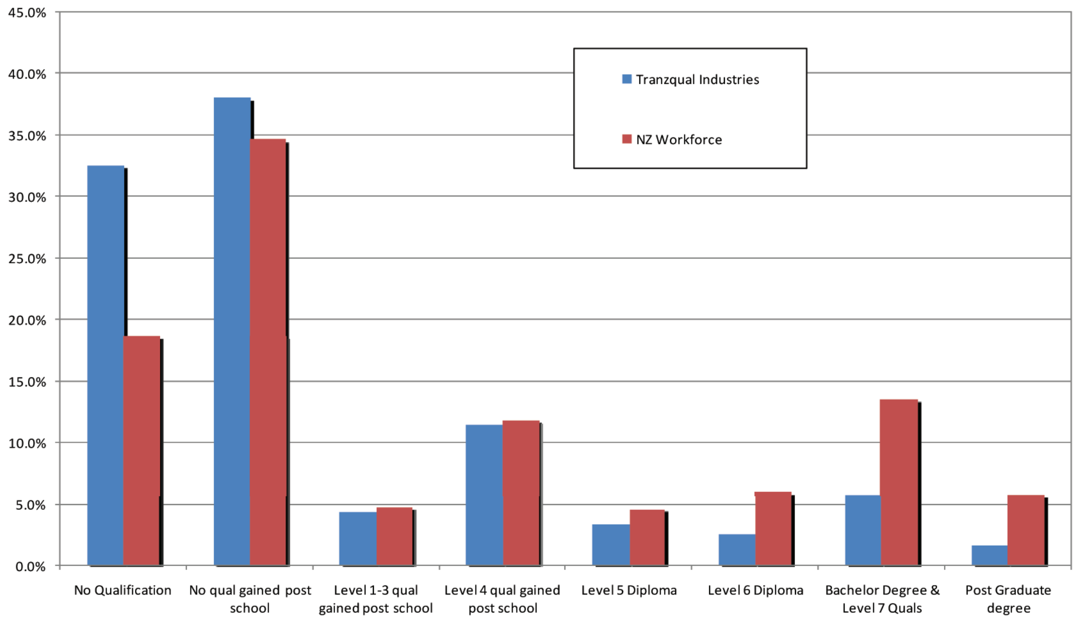
- *What issues, if any, does the level of secondary qualifications for workers present for the industry?*
- *How have training programmes been adapted or influenced to meet the needs of workers based on their secondary qualifications?*
- *How can the ITO support industry to engage and support workers who have low or no secondary qualifications into training?*

Post-school qualification

Post-school qualifications include all qualifications completed throughout adulthood other than those gained at secondary school. These qualifications can be completed through a range of providers and include qualifications gained through industry training. Post-school qualifications are important to consider as they are often more specific to industry needs than school qualifications.

In Tranzqual industries 70.8% of workers have no post-school qualifications, 15.8% have a certificate (level 1-4) gained after leaving school, 6% have a diploma (level 5 or 6) and 7.3% have a bachelor or higher degree. This compares to 53.5% of all workers who have no post-school qualifications, 16.6% with a certificate, 10.6% with a diploma and 19.4% with a bachelor or higher degree.

Figure 5: The proportion of people working in Tranzqual industries by highest post-school qualification



Source: 2006 Census of Population and Dwellings, Statistics New Zealand

Questions to consider about post-school qualifications:

- *What challenges, if any, does the distribution of workers' post-school qualifications pose for the industry?*
- *How can workers be encouraged to increase uptake of relevant post-school qualifications to meet skill needs?*

2 Highest post school qualification is the highest qualification, if any, gained after leaving secondary school. This may in a small number of cases be lower than a qualification a person has gained at school.

Fundamental skills - literacy and numeracy

A particular skills issue that is facing many industries is low literacy and numeracy. Raising levels of these fundamental skills can lead to increased productivity of workers, better functioning businesses, greater worker opportunities, a basis for development of further skills and ultimately more productive and economically successful industries. While these skills are critical, the problem may not be obvious where workers adopt coping mechanisms. In addition, the stigma that is often attached to low levels of literacy and numeracy means that many workers are reluctant to ask for or receive training in these areas. Identifying literacy and numeracy issues in the workplace can lead to better provision of training solutions that incorporate literacy and numeracy most effectively.

The Adult Literacy and Life Skills (ALL) Survey is an international comparative assessment that provides information about the literacy and numeracy of adults aged 16 to 65 years-old. The ALL survey in New Zealand was conducted on behalf of the Ministry of Education in conjunction with the OECD and a range of international agencies in 2006. ALL measures literacy and numeracy skills through participants completing a booklet of test items. In this report 'low' literacy or numeracy includes people in the lowest two of five categories for literacy or numeracy.

In the ALL survey respondents that were employed were categorised into nine industry groupings. These groupings are based on the International Standard Industrial Classifications 1989 (ISIC) so differ slightly from ANZSIC industrial classifications but are similar enough to allow meaningful comparison. The largest share of workers in Tranzqual industries fall within the "Transport & Communications" ISIC grouping.

In the transport & communications group 42.7% of workers were found to have low literacy, compared to the 40% of workers nationally who have low literacy.

In the transport & communications group 51.4% of workers were found to have low numeracy, compared to the 46% of workers nationally who have low numeracy.

Questions to consider about fundamental skills:

- *How do the findings from ALL compare to anecdotal or other evidence about literacy and numeracy in the industry?*
- *What challenges do literacy and numeracy issues present for providing training in the industry?*
- *How have training programmes been adapted to include literacy and/or numeracy?*

Participation in upskilling

Information about participation in upskilling is important to consider when examining skills in an industry as it can give information about the number of people that are involved in learning in a formal sense and also those that are involved in increasing their knowledge and skills more generally. Continuing learning is important to people of all ages regardless of its exact content as it encourages ongoing skill development.

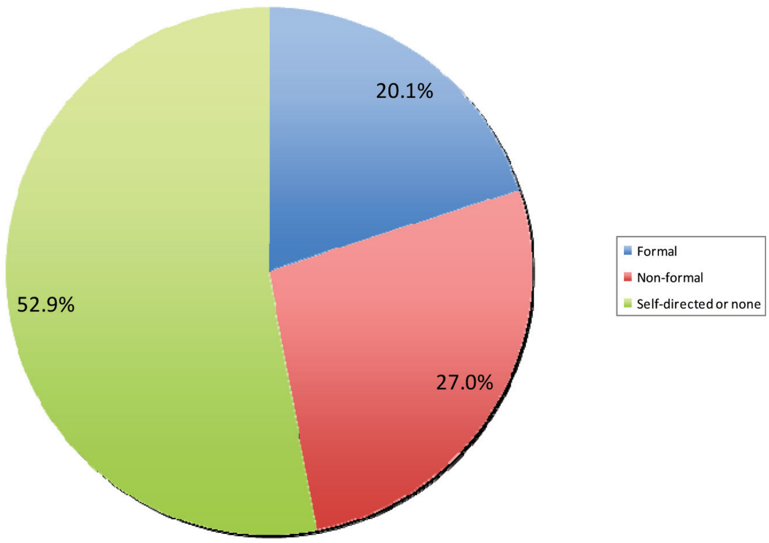
The ALL survey collected information about upskilling by asking respondents to identify the types of upskilling that they were involved in over the past year from a list of 30 options. These upskilling activities ranged from things like full time tertiary study to taking a guided museum tour. Activities were categorised into three groups for analysis. These are:

- Formal up-skilling refers to full-time or part-time participation in any course that is part of a programme of study leading toward a certificate, degree or diploma (for example, participation in a plumbing apprenticeship).
- Non-formal up-skilling refers to participation in any course that is not part of a programme of study leading toward a certificate, degree or diploma (for example, participation in a photography course at night-school).
- Self-directed or none refers to either no participation in any up-skilling activities, or participation in up-skilling activities such as guided tours, trade fairs or learning from instructional media.

As with information from ALL about literacy and numeracy, information from ALL about upskilling of those that were employed was categorised into nine industry groupings. These groupings are based on the International Standard Industrial Classifications (ISIC) so differ slightly from ANZSIC industrial classifications but are similar enough to allow meaningful comparison. The largest share of workers in Tranzqual industries fall within the "Transport & Communications" ISIC grouping.

In the transport & communications group 20.1% of workers were engaged in formal upskilling, compared to 23.2% of workers nationally. In addition, a further 27.0% of workers were engaged in informal upskilling, compared to the 29.1% of workers nationally. The remaining 52.9% of workers in the transport & communications group were either engaged in self-directed learning or no learning at all compared to 47.7% of workers nationally.

Figure 6: The proportion of people working in Tranzqual industries by participation in upskilling



Source: Adult Literacy and Life Skills Survey, Ministry of Education

Questions to consider about upskilling:

- *How do the findings from ALL compare to anecdotal or other evidence about upskilling in the industry?*
- *What characteristics of the industry contribute to the pattern of participation of upskilling in the industry?*
- *Is the current level of participation in upskilling in the industry seen as too low? If so, what has been done to encourage workers to participate in upskilling?*

What types of work are people in the industry doing? And what are work conditions like?

The types of work and the way in which people work provide important insights into an industry as well as its training and skill needs. Working conditions such as hours of work and pay are an important factor in determining what types of workers are recruited and retained in an industry. The types of jobs people are doing is also an important factor as it has an impact on who is attracted to an industry and also what skill and qualification levels workers need. These factors also have an impact on training needs as they can affect what types of training are most needed and what training models might be most appropriate.

In this section the occupation of workers in Tranzqual industries are considered first to get an insight into the types of work people are doing. Subsequently income and hours of work, two key measures of work conditions, are examined. Worker turnover rates are then examined to get an idea of worker stability in the industry. Finally, work conditions in the road transport and logistics industries in Australia are examined to compare what is happening between the two countries and provide an insight into movements within our common labour market.

Occupations

Most industries employ people to perform a wide variety of tasks or jobs. For example, a service industry may employ people to work directly with customers, people to do accounts and payroll, managers, people who do marketing and a range of other jobs. It is important to understand what types of jobs most people in an industry are doing in order to work out what types of skills need to be developed for the majority of workers and also what training should be considered for jobs which are essential but might not be seen as the core business.

Jobs in New Zealand are classified using a skill-based classification known as the Australian and New Zealand Standard Classification of Occupations (ANZSCO) 2006. ANZSCO identifies a set of occupations covering all jobs in the Australian and New Zealand labour markets, defines these occupations according to their attributes and groups them into categories.

Occupations in ANZSCO are classified into eight major groups. Occupations in these groups share similar tasks and also broadly similar skill levels. The eight major groups are Managers, Professionals, Technicians & Trades Workers, Community & Personal Service Workers, Clerical & Administrative Workers, Sales Workers, Machinery Operators & Drivers and Labourers. Examining the proportions of workers in an industry that are employed in occupations in each of these groups can give a general idea about the major types of work and also the general skill levels of occupations within an industry.

The percentage of workers in Tranzqual industries employed in each major group is shown in table 3 below along with the same breakdown for all workers in New Zealand. The most common major occupational group for people working in Tranzqual industries is the Machinery Operators & Drivers group. Of all people working in Tranzqual industries 45.7% of people work in this group compared to 6.1% of all workers in New Zealand.

Table 3: The percentage of people working in Tranzqual industries and all NZ industries by major occupation group

MAJOR GROUP	TRANZQUAL	ALL NZ INDUSTRIES
Managers	12.8%	18.2%
Professionals	4.3%	20.0%
Technicians & Trades Workers	3.7%	12.9%
Community & Personal Service Workers	2.3%	8.4%
Clerical & Administrative Workers	19.3%	12.9%
Sales Workers	4.6%	9.9%
Machinery Operators & Drivers	45.7%	6.1%
Labourers	7.3%	11.7%

Source: 2006 Census of Population and Dwellings, Statistics New Zealand

The categories at the most detailed level of the ANZSCO structure are called 'occupations'. An occupation is defined as a set of jobs that require the performance of similar or identical sets of tasks. As it is rare for two actual jobs to have identical sets of tasks, in practical terms, an occupation is a set of jobs whose main tasks are characterised by a high degree of similarity. There are just under 1000 separate occupations defined in ANZSCO.

There were people working in 546 different ANZSCO occupations in Tranzqual industries at the time of the 2006 Census. However, the majority of people work in a small number of these occupations. The most common occupation in Tranzqual industries is 'Truck Driver (General)' which is the occupation of 20.9% of people working in the industry. The ten most common occupations of workers in Tranzqual industries are shown in table 4 below.

Table 4: The number of people working in Tranzqual industries by occupation and the share of all workers in the industry in each occupation

MOST COMMON OCCUPATIONS	NO. OF WORKERS IN TRANZQUAL INDUSTRIES	% OF ALL TRANZQUAL WORKERS	NO. OF WORKERS IN TOTAL NZ WORKFORCE	TRANZQUAL WORKERS AS % OF TOTAL NZ WORKERS IN EACH OCCUPATION
Truck Driver (General)	12,714	20.9%	25,551	49.8%
Taxi Driver	3,972	6.5%	4,626	85.9%
Bus Driver	3,657	6.0%	4,464	81.9%
Courier	2,868	4.7%	4,221	67.9%
Storeperson	2,055	3.4%	18,330	11.2%
General Clerk	1,866	3.1%	55,548	3.4%
Chief Executive or Managing Director	1,542	2.5%	38,130	4.0%
Despatching and Receiving Clerk	1,458	2.4%	4,962	29.4%
Sales Representatives nec	1,413	2.3%	39,126	3.6%
Waterside Worker	1,194	2.0%	1,530	78.0%

Source: 2006 Census of Population and Dwellings, Statistics New Zealand

Questions to consider about occupations:

- *Are there any occupations in this industry that might be covered by one or more other ITOs?*
- *What sorts of different training needs do people working in different occupations within the industry have?*
- *What challenges does the occupational profile present for recruiting or retaining staff in the face of labour and skill shortages?*

Income

Income is one of the most fundamental and tangible measures of the returns that individuals get from work. Therefore, information about income is important to know when considering how to attract people to an industry, possible problems with staff retention and when comparing an industry with other similar industries. Both average income as well as the distribution of income are important to consider. It should be noted, in some industries, such as those with large numbers of volunteers, non-monetary returns (such as a sense of contributing to society or personal satisfaction) can also play an important role in attracting and retaining people.

One important factor that can impact on income is the number of hours a person works. In industries with a high proportion of part time work, average incomes will be lower than an industry where people work longer hours even if all other factors are the same. Similarly, in some industries incomes are high due to long hours of work. Therefore, this information about income should be considered in conjunction with the information about hours of work that is presented in the following section.

Information in the Census is about gross total personal income rather than income from only wages and salaries. Therefore, other sources of income including government transfers (such as benefits), investment income and rents are included in Census measure. However, wages and salaries represent the majority of total personal income and so total personal income is a reasonable proxy for income from work.

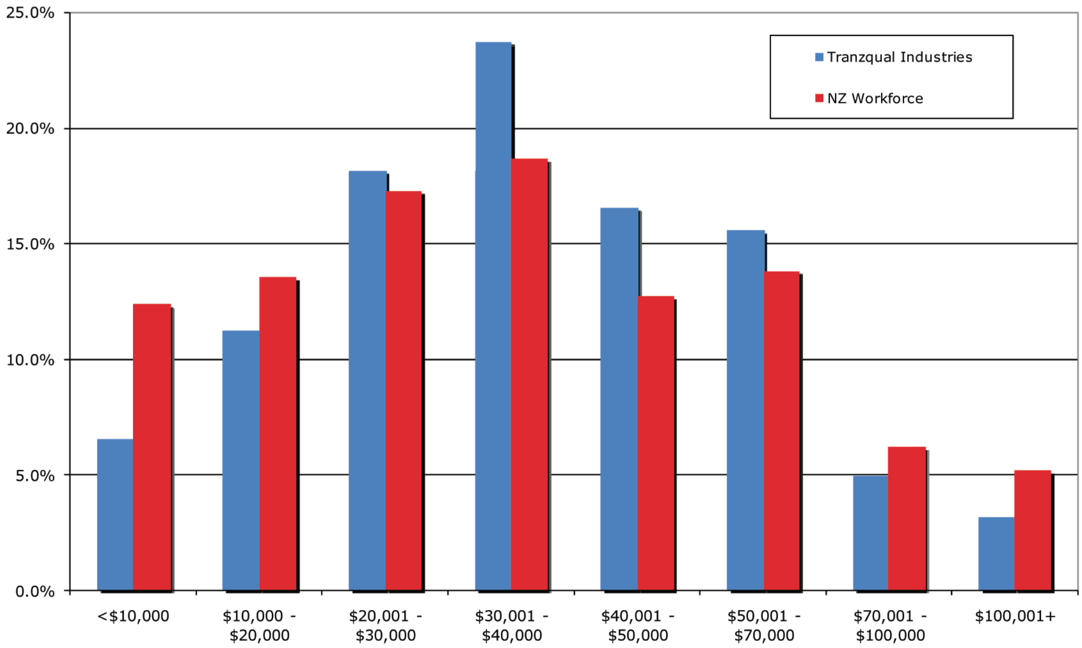
At the time of the 2006 Census, the mean (average) income for people working in Tranzqual industries was $39,300, which is within $1,000 of the national average ($38,900).

The Quarterly Linked Employer Employee Dataset (LEED) contains information about the amount of money people earn from wages or salaries and in late 2008 was released using ANZSIC 2006 industry classifications. This information has the advantage of separating wages and salaries from other income sources but some information, such as income distribution, is not available so LEED should therefore be used in conjunction with, rather than replace, census data on income.

In the year to September 2007, the mean earnings from wages and salaries for people working in Tranzqual industries was $45,479, which is slightly higher than the national average of $44,120.

A second income variable that is useful to consider is the distribution of workers in an industry across income bands. There are differences between Tranzqual industries and all NZ industries in the spread of workers across income bands. The largest differences in the income distribution between Tranzqual industries and the average across NZ industries are a higher proportion of people earning $30,001 - $40,000, and a lower proportion of people earning <$10,000.

Figure 7: The proportion of people working in Tranzqual industries by income band



Source: 2006 Census of Population and Dwellings, Statistics New Zealand

A third income variable that is useful for industries to examine is the ratio of earnings between existing staff and new hires, a measure found in LEED. This is useful to consider because:

"When labour is hard to get, businesses are likely to use earnings to both retain and attract employees.... An increasing ratio of new to continuing jobs suggests that businesses were using earnings to attract new staff. A decreasing ratio suggests businesses were trying to retain labour rather than attract new staff. "

In the year to September 2007 new staff in Tranzqual industries earned on average 83.8% of the average earnings for existing staff. This is a slightly smaller pay gap than the industry average five years ago when new staff earned on average 81.4% of the average earnings for existing staff.

Questions to consider about income:

- *What impacts do average income and income distribution have on the industry's ability to attract and retain staff?*
- *How does the industry's income distribution impact on training or skill needs or preferences?*
- *Are there factors that mean that income by itself is not a fair representation of returns people get by working in the industry or what might attract them into the industry?*

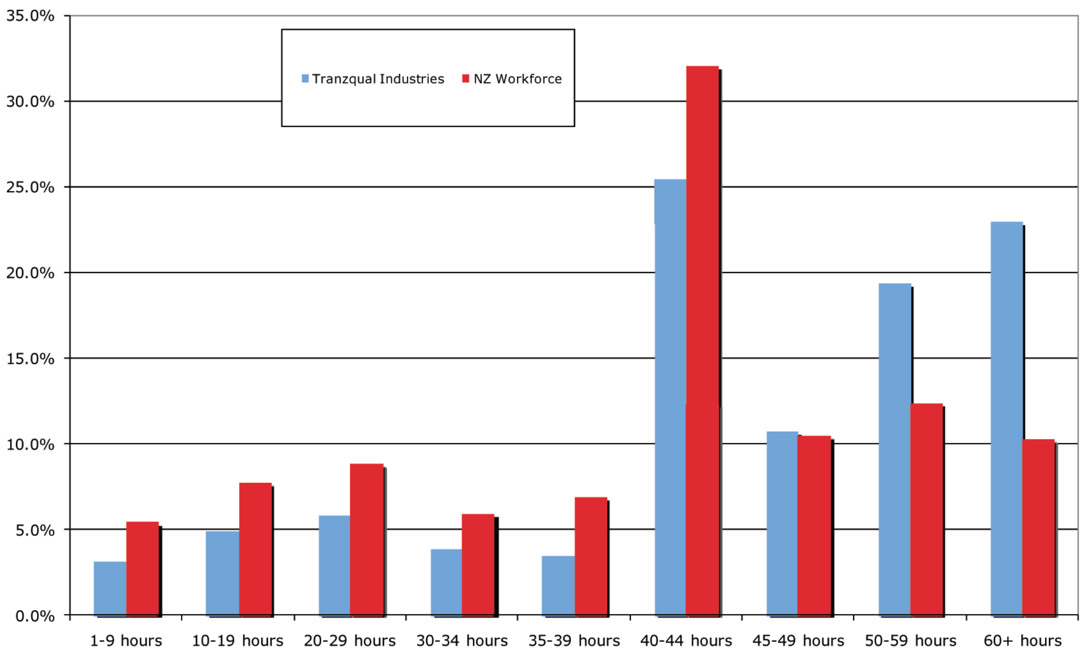
Hours worked

The number of hours that people work per week is an important indicator of work conditions. Hours of work can vary considerably from industry to industry due to the prevalence of part time work, the degree of shift or on call work, and in some cases the nature of the work. Hours of work can have a significant impact on the types of people who work in an industry. For example, industries with a considerable proportion of part time work are likely to attract significant numbers of students and young people while industries with very long hours are less likely to be appealing to people with young children. Training and skill needs may also be impacted by hours of work. For example, if an industry has large numbers of workers working very few hours it may be more difficult for training to take place, and employees or employers may be less likely to take up training opportunities.

Over time the number of hours that people work per week has changed considerably. The percentage of people who work the 40 hours per week that was once considered standard has decreased while the proportions of people working part time or working very long hours have both increased.

In Tranzqual industries 29% of workers work around 40 hours per week (35 - 44 hours), a smaller proportion than the 39% of all workers who work that number of hours. Part time work is less common in Tranzqual industries than in NZ as a whole with 14.1% of workers working less than 30 hours compared to 22% of all NZ workers. Very long hours of work are more common in Tranzqual industries than in all NZ industries, with 42.4% of people in the industry employed for more than 50 hours compared to 22.7% of all workers.

Figure 8: The proportion of people working in Tranzqual industries by hours worked per week



Source: 2006 Census of Population and Dwellings, Statistics New Zealand

Questions to consider about hours worked:

- *What impact does the hours of work profile for the industry have on the industry's ability to attract and retain staff?*
- *Does anything about the hours of work profile in the industry impact on how employees can best access training or how the ITO needs to arrange training?*
- *How have jobs and processes in the industry been changed to meet the needs of staff to work non-standard or flexible hours? If so, what changes have been made? If not, what opportunities for this exist?*

Worker turnover rates

Worker turnover is a measure of the number of people who either start a new job in an industry or leave their existing job in the industry. This provides information about the level of change in workers in an industry. Worker turnover is important for an industry to consider because a rapidly changing workforce may be less productive as new people take time to develop industry specific skills. At the same time, some degree of worker turnover is positive because new workers bring new skills and new ideas into an industry.

From a training point of view, a high level of turnover may mean more training in core industry skills is needed if there are large numbers of new employees. Large numbers of departing employees may impact on training completions and also on the number and quality of more senior staff to arrange and support training or mentor trainees. In addition, training can be used to encourage workers to stay in an industry longer through providing development and career pathways.

Information about worker turnover is available from the Quarterly Linked Employer Employee Dataset (LEED). This provides a measure of the turnover on a quarterly basis using the numbers of people starting new jobs in an industry or leaving existing jobs in the industry. The latest LEED information available relates to the September 2007 quarter. Results reported here are an average of four quarters to account for seasonal variation.

On average in the year to September 2007, 19,689 people started a new job in a Tranzqual industry per quarter while 20,040 people per quarter left or finished their jobs in an industry.

New starts and departures resulted in a turnover rate of 16.1% of workers per quarter in Tranzqual industries per quarter in the year to September 2007, a slightly lower rate than the national turnover rate of 17.4%.

The turnover rate in Tranzqual industries in the year to September 2007 was also slightly lower than the rate five years earlier, in the year to September 2002, when the rate was 17.1% per quarter.

Questions to consider about worker turnover:

- *What impact does worker turnover have on the industry?*
- *How does the level of worker turnover impact on training provided in the industry?*
- *How has provision of training impacted on worker turnover?*

Special topic- the Road Transport and Logistics industry in Australia

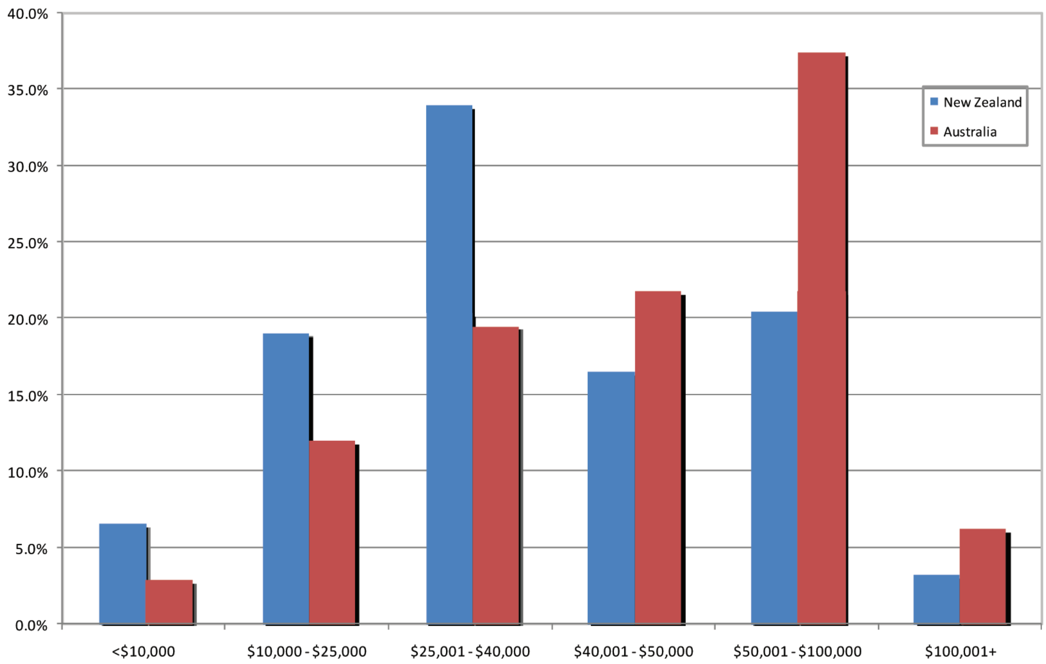
Skill and labour shortages have been a problem for many industries in NZ over the past decade as demand for labour has been strong while the supply of labour has been more limited. One of the factors that has impacted on labour supply is emigration of New Zealanders, particularly to Australia. Migration of New Zealanders to Australia has been high over the past decade, and has increased in the past few years reaching a 30-year high of 34,000 in late 2008. One of the reasons why some workers are moving to Australia is the perception of better employment opportunities and working conditions in Australia, particularly in respect to higher incomes. Since we share a common labour market with Australia workers can easily move between the two countries to take advantage of these different conditions.

In this section some key indicators – industry size, income and hours worked – are examined for Tranzqual industries in Australia using the Australian 2006 Census. Comparisons can be made between the two countries since industries in NZ and Australia are classified using the same classification system, ANZSIC 2006. However, these figures should be treated as indicative only as there are some differences in the way the data is collected, particularly for income. The figures also relate to a slightly different time period as the Australian 2006 Census was conducted in August 2006 while the New Zealand 2006 Census was conducted in March 2006.

In 2006 there were 289,430 people working in road transport and logistics in Australia or 3.18% of the total Australian workforce compared to 3.06% of the NZ workforce. This means that the road transport and logistics industry is larger in Australia in terms of numbers of workers, and slightly larger in terms of share of all workers.

In order to compare incomes all income figures from the Australian Census have been converted to New Zealand dollars using the exchange rate from August 2006. In general the income distribution of workers in Tranzqual industries is lower in New Zealand than in Australia. In particular, 25.7% of NZ workers in Tranzqual industries earn less than $25,000 a year compared to only 14.9% of workers in Australia. In addition, only 23.7% of workers in the industry in NZ earn more than $50,000 per year while in Australia 43.7% of workers in the road transport and logistics industries earn more than this amount. A detailed breakdown of income distribution in New Zealand and Australia is shown in Figure 9 below.

Figure 9: The income distribution of people working in Tranzqual industries in New Zealand and Australia



Source: 2006 Census of Population and Dwellings, Statistics New Zealand and 2006 Census of Population and Housing, Australian Bureau of Statistics

In Tranzqual industries in NZ, 29% of workers work around 40 hours per week (35 - 44 hours), a smaller proportion than the 33.6% of Australian workers in the industry who work that number of hours. Part time work is less common in Tranzqual industries in NZ than in Australia with 14.1% of workers in NZ working less than 30 hours compared to 18.7% of workers in Tranzqual industries in Australia. Very long hours of work are more common in Tranzqual industries in NZ than in Australia, with 42.4% of people in the industry in NZ employed for more than 50 hours compared to 33.3% of those in Australia.

Questions to consider about conditions in Australia:

- *What reasons may contribute to the differences in work conditions in the industry between New Zealand and Australia?*
- *Is there any evidence of workers in the industry in New Zealand moving to Australia because of work conditions? If so, how has this impacted on the industry in New Zealand?*
- *What challenges do differences in work conditions between New Zealand and Australia present for the industry in terms of training and skill development?*

What are characteristics of firms in the industry?

Information about the characteristics of firms is important when thinking about the nature of the industry and also training and skill needs. Characteristics such as firm size, location and the prevalence of owner operated firms can have a considerable impact on the ease of accessing training, the range of skills needed, and how an ITO can best communicate with the industry as a whole.

In this section firm size is the first topic examined. Secondly, employment status (the percentage of workers who are employees, employers and self-employed) is analysed. This is followed by analysis of the spread of workers in firms in major urban, small urban and rural areas. Finally firm births and deaths, new and closing firms, are examined in the final part of this section.

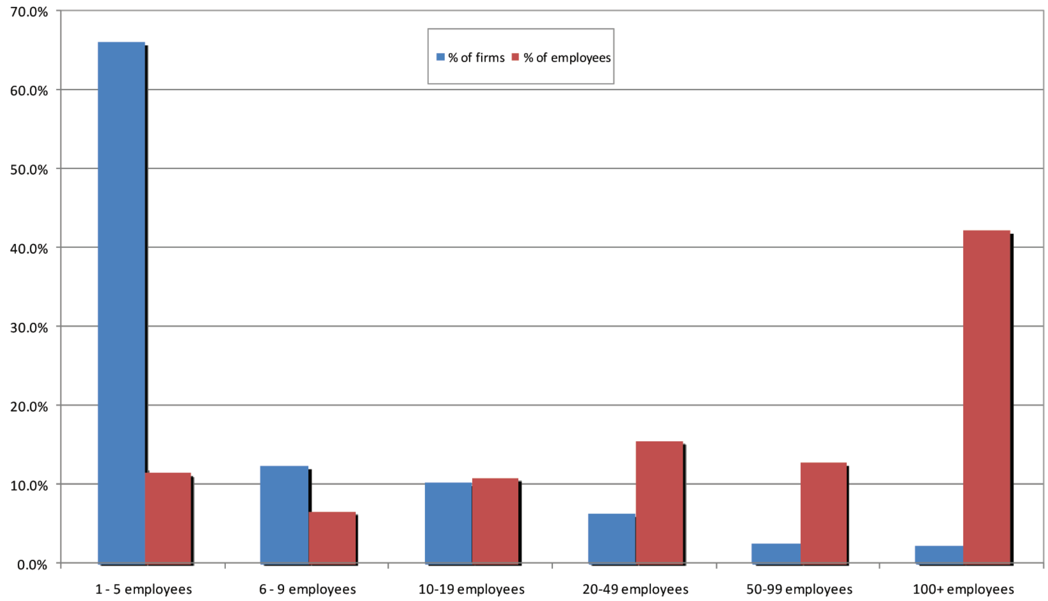
Firm size

Firm size is a measure of the size of firms in terms of number of employees. In this section both the number of firms with various employee number bands as well as the numbers of workers employed at those firms are examined. The size of firms in an industry is important to consider when thinking about skill and training needs as it can impact on the types of training needed, ease of participating in training, and likelihood of accessing skill and training resources. Firms that do not have workers, such as those that are registered but currently inactive, are excluded from this analysis.

Across all NZ industries the vast majority of businesses are small (79.8%), employing fewer than 10 people, or medium (17.1%), employing 10 – 49 people. However, the majority of people work in very large businesses with nearly half of all workers (46.6%) working in a business of 100 people or more.

Like the majority of NZ industries, small firms make up the largest share of all firms in Tranzqual industries. Tranzqual industries are comprised of 78.6% small firms (1-9 employees), 16.6% medium sized firms (10-49 employees), 2.5% large firms (50-99 employees), and 2.2% very large firms (100+ employees). In terms of workers small firms employ 18.2% of all workers in Tranzqual industries while medium sized firms employ 26.6% of workers, large firms employ 12.9% of workers and very large firms employ 42.3% of workers. A detailed breakdown of firms and employees by firm size is shown in figure 10 below.

Figure 10: The proportion of firms and employees in Tranzqual industries by firm size



Source: Business Demography, Statistics New Zealand

Questions to consider about firm size:

- *What characteristics of the industry cause the distribution of firm sizes shown above?*
- *Are there any sizes of firms that are more likely than others to be engaged in industry training? If so, why?*
- *What challenges does the profile of firms by size for your industry present in terms of industry training?*

Employment status

Employment status is a measure of workers' employment arrangements with the firm they work for. Close to 80% of workers in New Zealand are employees, which means they have an employment contract and receive remuneration, usually in the form of wages or salaries. People who are self employed work in a business that they own and are classified as either 'employers' if they have staff or 'self employed without employees' if they do not. Unpaid family workers are people who work without pay in a business owned by a relative, the majority of these workers work in agriculture or in small shops such as dairies and takeaway services.

Employment status is an important indicator to consider when examining training needs as Industry Training currently only covers employees. This means that industries that have significant numbers of people who are not employees may face issues around accessing training.

Like the majority of industries in NZ, most workers in Tranzqual industries are employees, with 77.5% being employees. This is in line with the 78.4% of workers in all industries that are employees. Compared to all NZ industries, Tranzqual industries have similar proportions of people that are employers and unpaid family workers, as well as a similar proportion of people that are self-employed without employees. A detailed breakdown is shown in table 5 below.

Table 5: The percentage of people working in Tranzqual industries and all NZ industries by employment status

EMPLOYMENT STATUS	TRANZQUAL	ALL NZ INDUSTRIES
Employee	77.5%	78.4%
Employer	6.5%	7.4%
Self-employed without employees	15.0%	12.2%
Unpaid family worker	1.0%	2.1%

Source: 2006 Census of Population and Dwellings, Statistics New Zealand

Questions to consider about employment status:

- *How do characteristics of the industry influence the patterns of employment status?*
- *Does anything about the employment status profile in the industry impact on how training can be accessed or how the ITO needs to arrange training?*
- *Does the industry include people who are not counted as being in employment (for example volunteers)? If so, how have their training been taken into account?*

Location of firms

The region and types of areas in which firms are located has an impact on future planning for the industry as well as on skill and training needs. The location of firms and workers is important to consider in the face of an increasing shift of people from rural to urban areas. This will impact on industries that are heavily concentrated in rural areas as they may face shortages of workers and some industries may face shortages of customers or clients. Conversely, industries that are concentrated in urban areas may experience an increase in labour supply. In terms of skill development and training, the location of firms impacts on how training is best accessed or delivered. In urban areas there is generally better access to training providers such as Institutes of Technologies and Polytechnics (ITPs), Private Training Establishments (PTEs), and Universities, while in more rural areas training might be best accessed using new technologies, distance learning, or all on-job methods.

The region in which firms are located can provide insight into where the industry is concentrated and therefore where there may be a need for a particular focus in terms of training and labour supply. It is also useful to know if there are regions where there is an over-representation of firms as these are areas where the industry may comprise a larger share of employment opportunities than would otherwise be expected.

The regional council areas with the largest number of businesses in Tranzqual industries are Auckland Region, Canterbury Region and Wellington Region. These regions have 35.4%, 13% and 10.8% respectively of all businesses in Tranzqual industries. The regions where Tranzqual industries are most over-represented are Nelson Region, Auckland Region and Wellington Region.

Further insights can be found by looking at the location of firms in terms of whether they are in an urban or rural area. In this section the location of firms have been divided into three types of areas: major urban areas, small urban areas, and rural areas based on the Territorial Authority in which they were located. These groups were chosen based on several characteristics including population, the prevalence of different types of tertiary providers, the range of services available and the variety of types of industries and occupations present. Major urban areas include the greater urban areas around Auckland, Hamilton, Wellington, Christchurch and Dunedin, small urban areas include smaller cities and provincial centres such as Tauranga, New Plymouth, Nelson and Timaru, while rural areas are areas outside of the main or small urban areas.

The largest percentage of people working in firms in Tranzqual industries are located in major urban areas, with 58.8% of people working in firms in these areas compared to 23.2% in small urban areas and 18% in rural areas. This distribution is similar to the distribution for all industries although Tranzqual industries have marginally higher proportions of people in firms in major urban and small urban areas and a marginally lower proportion in rural areas. A detailed breakdown is shown in table 6 below.

Table 6: The percentage of people working in Tranzqual industries and all NZ industries by location of firms

URBAN/RURAL SPLIT	TRANZQUAL	ALL NZ INDUSTRIES
Major urban	58.8%	56.4%
Small urban	23.2%	22.3%
Rural	18.0%	21.3%

Source: 2006 Census of Population and Dwellings, Statistics New Zealand

Questions to consider about location of firms:

- *What impact does the location of firms in the industry have on the industry's ability to attract and retain staff?*
- *Does anything about the location of firms in the industry impact on how employees can best access training or how the ITO needs to arrange training?*

Firm births and deaths

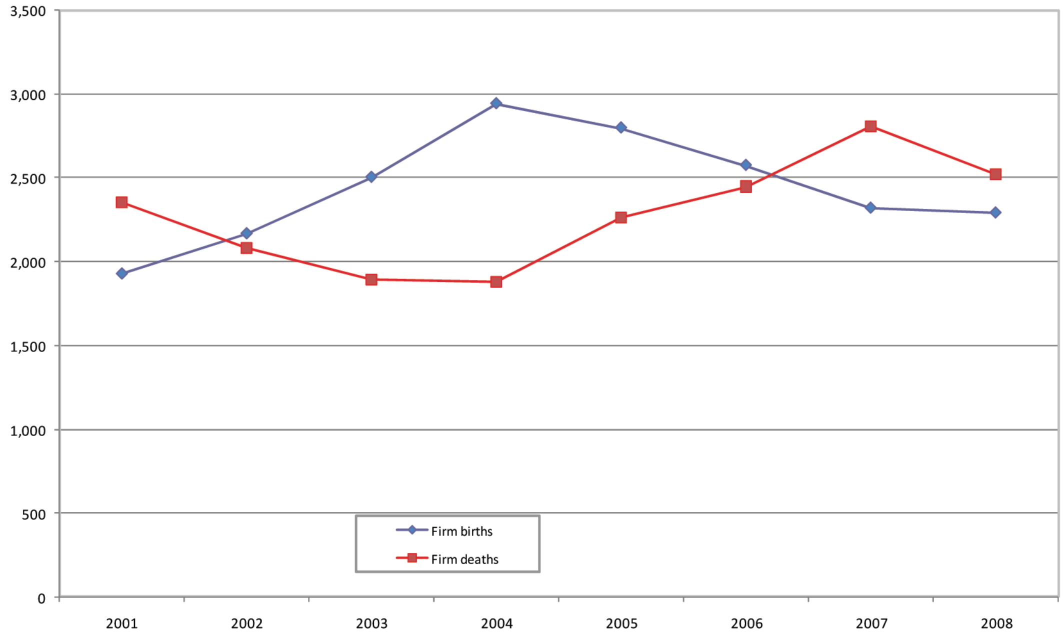
One of the types of information available from Business Demography data relates to firm 'births' and firm 'deaths'. A firm birth is defined as a new enterprise being created while a firm death is defined as an existing enterprise closing.

Firm births and deaths are important to consider both from an industry perspective and also from a training perspective. In terms of industry, firm births provide an indication of people's willingness and confidence in starting enterprises in the industry, while firm deaths provide an indication of the survival of firms. In terms of training, an industry with high rates of firm births may have unique training needs as new firms will need to put training arrangements in place, while industries with high rates of firm deaths need to consider the impact of closure on existing trainees.

The latest available information about firm births and deaths relates to the year to February 2008. In the year to February 2008 there were 2292 firm births in Tranzqual industries or 4.1% of all firm births in the same period. While many of these firms had no workers, new firms collectively employed 878 people. In the year to February 2008 there were 2523 firm deaths in Tranzqual industries or 4.8% of all firm deaths in the same period. While many of these firms had no workers, collectively closing firms employed 730 people. The net result of firm births and deaths in Tranzqual industries in the year to February 2008 was a decrease of 231 firms, but an increase of 148 people.

The changes in firm births and deaths over time can be driven by a range of factors including changes in the economy more generally, changes in the size of firms in the industry, and changes in perceptions about the viability of operating a business in the industry. There were 212 fewer firm births in Tranzqual industries in the year to February 2008 than in the same period in 2003. There were 629 more firm deaths in Tranzqual industries in the year to February 2008 than in the same period in 2003. Annual firm births and deaths from 2001 – 2008 are shown in the figure below.

Figure 11: Firm births and deaths in Tranzqual industries 2001 - 2008



Source: Business Demography, Statistics New Zealand

Questions to consider about firm births and deaths:

- *How do patterns of firm births and deaths compare to anecdotal evidence of firm dynamics?*
- *What drivers are causing the observed pattern of births and deaths? How is this pattern expected to change in the next few years?*
- *What, if any, consideration has been given to training needs for people working in new firms?*
- *What, if any, consideration has been given to the needs of people who were still actively involved in training in a firm that has now closed?*

What other information might be useful?

While this Industry Profile covers key baseline information about Tranzqual industries there is also a great deal of other information which may be useful for informing industry planning and considering skill and training needs. Some of this information is currently available from other sources, including the ITO or industries themselves, some is not yet available but will be in the future and some will require further research. This section outlines some of these types of information.

Multiple variable breakdowns

Most of the information in this industry profile is based around analysis of industry by a single variable such as region or gender. More in depth analysis involving multiple variables such as industry by age and ethnicity could be done using existing statistical information held by the ITF or through obtaining further cross tabulations from Statistics New Zealand.

Length of time in industry

An important indicator for determining skill and training needs is the length of time that workers have been in the industry. This is important as people who have been in the industry for a long period of time are likely to have different training needs from people who have just started. In addition, the average length of time is important because it can influence the timing or types of training provided. This information is not currently available from any official data sources but is possibly something that ITOs or other industry groups could investigate.

Detailed qualification information

The information included in this industry profile is very high level as it only includes the level of a persons highest qualification rather than any information about the subject or field of qualifications a person holds or any detail about particular skill. This is something that could be investigated further to provide information about more specific training needs.

Where to go for further information

The information is this report has come from a range of sources including Statistics New Zealand, the Ministry of Education, and the Australian Bureau of Statistics. These organisations all hold information that can be very useful when doing analysis about industries, skills, and other labour market issues. This section provides a short overview of the information available from each source and links to information available on the internet.

There is also a range of other organisations that have relevant information available about specific industries or provide economic commentary such as the Ministry of Agriculture and Fisheries, the Department of Labour, leading banks, and economic consulting agencies.

Statistics New Zealand

Statistics New Zealand is New Zealand's national statistical office and is the country's major source of official statistics. There are a range of statistics that are relevant to industry, skill development and the labour market including 2006 Census, Business Demography, the Linked Employer-Employee Dataset (LEED), and the Household Labour Force Survey (HLFS). All of these are available on the Statistics New Zealand website: www.stats.govt.nz

Ministry of Education

The Ministry of Education is the government's lead advisor on the New Zealand education system. As part of this role they collect a range of education statistics and undertake research on educational topics including the ALL survey which features in this report. This information is available on the Ministry of Education's 'Education Counts' website: www.educationcounts.govt.nz

Australian Bureau of Statistics

The Australian Bureau of Statistics (ABS) is Australia's national statistical agency and provides statistics on a wide range of topics including industry and the economy. Many of the classifications used by the ABS are the same as those used by Statistics NZ which enables direct comparison of statistics. Data and other information is available on the ABS website: www.abs.gov.au

Industry Training Federation

The Industry Training Federation (ITF) is a membership-based organisation, representing the 39 Industry Training Organisations (ITOs) in New Zealand to improve the policy for and delivery of industry skill development and workplace learning. A range of information about skills as well as research on training and skill development is available from the ITF website: www.itf.org.nz

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