

Early Childhood
Education
Workforce Report

December 2025



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Introduction

Early childhood education (ECE) plays a foundational role in shaping the educational journey of Aotearoa New Zealand's children. Despite its significance, there has been no comprehensive modelling to understand workforce demand and supply.

Toitū te Waiora is the Workforce Development Council responsible for developing and maintaining ECE qualifications that sit below degree-level, setting the standards and moderating the attainment of those qualifications, and conducting workforce analysis.1

We have partnered with the Early Childhood Council to produce this report on the ECE workforce. The Early Childhood Council is the largest peak body for childcare centre providers, representing more than 1.500 centres across New Zealand.²

We prepared this report to present new information about the ECE workforce, specifically the ECE workforce forecast model and the factors affecting workforce demand and supply.

Early childhood education (ECE) plays a foundational role in shaping the educational journey of Aotearoa New Zealand's children.





Methodology

The ECE sector defines itself and its workforce in a variety of ways. For the purposes of this report, we use 'ECE service' to broadly describe all types of services providing education and care to children under six years of age. At times this report may refer to specific types of services explicitly. We use 'aualified ECE teacher' to describe teachers who hold a degree-level qualification, and 'broader ECE workforce' to describe teachers who are in training, or who hold a diploma or certificate. We have summarsied the different types of

ECE services in Appendix A and B.

Our preparation for this report included:

- Research in the Stats NZ Integrated Data Infrastructure (IDI) to inform discussion about health and safety and work, workforce demographics, and work arrangements.
- Desktop research to inform discussion about population trends, drivers of supply and demand, market and workforce demographics, and the legislative and regulatory environment.
- Testing assumptions and draft findings with the Early Childhood Council, the Ministry of Education, and the Toitū te Waiora ECE National Industry Advisory Group.³
- To inform discussion of workforce and market demographics, we used data published by the Ministry of Education on the Education Counts website, under the ECE Census programme.

This data enables a detailed look at the workforce and the market it serves, without placing additional administrative burden on operators within the ECE industry. We supplemented this data with additional information from Stats NZ Infoshare and the Stats NZ Integrated Data Infrastructure to inform demand and supply forecasting.

Detailed information about how we collected, transformed, and used data in this report can be found in the supporting documents package. https://toitutewaiora.nz/early-childhood-educationworkforce/

Access to some of the data used in this study was provided by Stats NZ under conditions designed to give effect to the security and confidentiality provisions of the Data and Statistics Act 2022. The results presented in this study are the work of the author, not Stats NZ or individual data suppliers.

These results are not official statistics. They have been created for research purposes from the Integrated Data Infrastructure (IDI), which is carefully managed by Stats NZ. For more information about the IDI please visit https://www.stats.govt.nz/ integrated-data/.

The results are based in part on tax data supplied by Inland Revenue to Stats NZ under the Tax Administration Act 1994 for statistical purposes. Any discussion of data limitations or weaknesses is in the context of using the IDI for statistical purposes and is not related to the data's ability to support Inland Revenue's core operational requirements.



The Early Childhood Education Sector

The ECE sector in Aotearoa New Zealand is diverse. There are numerous types of ECE services available, and each have different ownership and governance structures, operating models, philosophies, and legislative and regulatory requirements that shape their workforces.

The different types of ECE services are summarised at Appendices A and B.

Typically, population distribution drives the location of ECE services, which tend to be offered in areas where families reside. For example, with a higher concentration of working parents in the Auckland Region, there is a higher concentration of ECE services available. Similarly, areas of higher Māori and Pacific populations have higher concentrations of Te Kōhanga Reo and Pacific language ECE services.

While the government does not directly own or run ECE services, it sets the legislative and regulatory frameworks that underpin licensing and funding of services. The Education and Training Act 2020 and the Education (Early Childhood Services) Regulations 2008 and their subsequent amendments outline the requirements for the ECE sector, including the licensing of services, funding eligibility, teacher qualifications and practising certificate requirements.



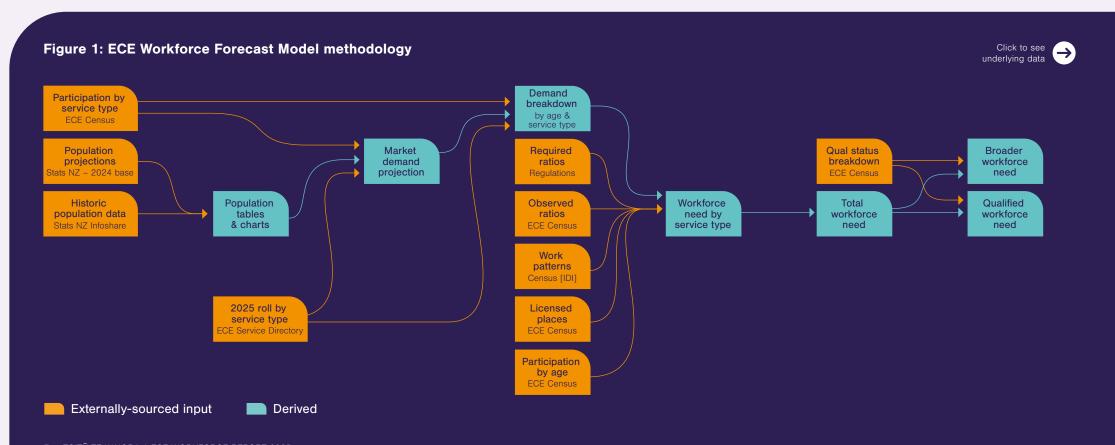
Workforce Forecast Model

We have developed an ECE workforce forecast model, which uses historic ECE data alongside Stats NZ population projections and census data about work patterns in ECE to predict sector needs between now and 2035.⁴ ECE has not previously been included in education workforce projections. Our methodology is described below.

The ECE Workforce Forecast Model shows the minimum staff required, based on mean observed staffing ratios, assuming low, medium, or high demand scenarios occur. The demand scenarios are based on high, medium, and low forecast populations for under-five year olds, taking births, migration, and participation trends into account.

The model forecast within 0.7 percent of the actual demand for ECE services in 2025.

The model suggests the current supply of teachers for centre-based, teacher-led ECE services nationally, if maintained at current levels, will be sufficient for future years.



However, ECE services, peak bodies, regulators, and other organisations with an interest in early learning regularly cite workforce shortages in the ECE sector. Demand for services, and supply of workforce may look different at a regional level, or by type of service. In other words, there may be enough places for children and the minimum number of teachers and other staff in centre-based, teacher-led services overall nationally, but not necessarily in the specific ECE service that a parent wishes to use, in the location they want, on the days they want. Some ECE services have wait-lists which differ by age and region.

The forecast model does not set a 'target' for the size of the workforce. It describes the forecast minimum size of the workforce, given a range of demand scenarios. It does not mean that ECE services are or will be 'over-staffed'.

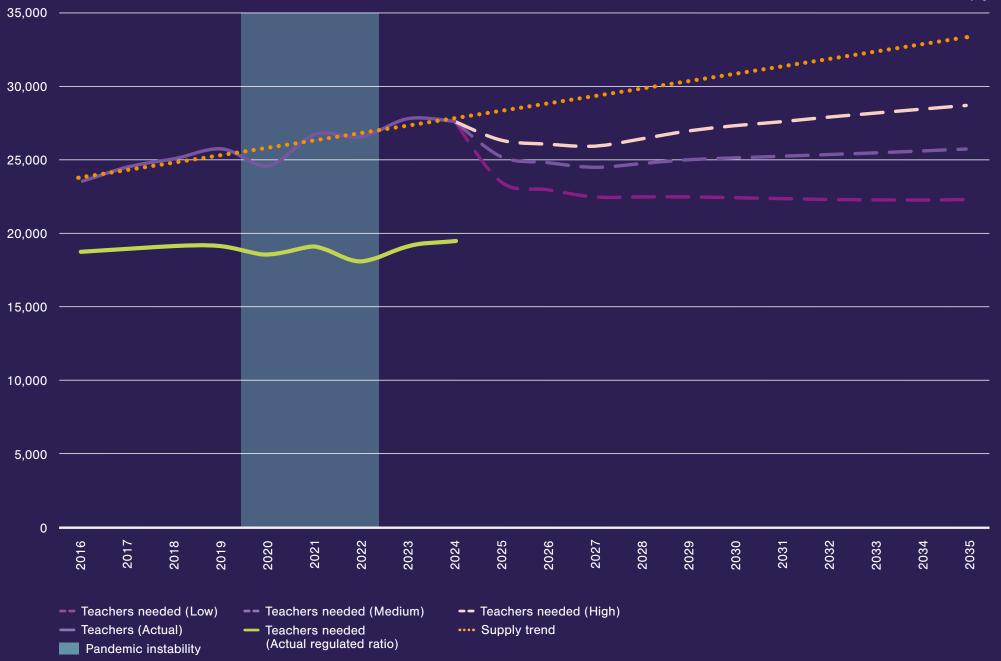
Many services choose to staff above minimum ratios to provide a higher level of service to their children. Some services choose to staff above the minimum

ratios to ensure workforce capacity for non-contact activities. Some services can and do staff above minimum ratios because they can charge parents more to cover the increased personnel expenditure. Conversely, some services in lower socio-economic areas may not be able to charge parents more, so may operate nearer the minimum requirements.



Figure 2: Forecast total FTE workforce, for centre-based, teacher-led services





Factors affecting demand

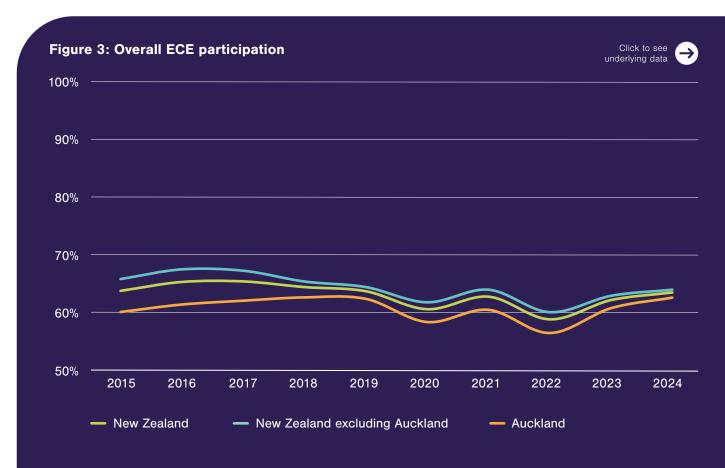
Our model shows that population is by far the strongest predictor of demand for ECE services. At any time, 60 to 65 percent of the under-five population are participating (enrolled) in some type of ECE service. Figures 3 and 4 show participation trends over the last decade.⁵

Auckland participation trends differ to the rest of the county. Four-year-olds' participation in Auckland was lagging behind the rest of the country in 2015 but was slightly higher by 2019. Participation of four-vear-olds in Auckland bounced back faster than the rest of country post-Covid-19. Auckland appears to be on track to exceed national average participation for four-year-olds again in 2026 if the current trend continues. Auckland's participation rates for younger children are on track to equal or exceed the national average soon too.6

In 2015, there was a slump in the number of births in New Zealand which resulted in a decline in ECE enrolments from 2016 to 2019. A similarly low number of births in 2022 is compounded by the lowest natural increase in population globally since World War Two and expectation that global fertility rates will further decline.7

With no expected recovery to pre-Covid-19 birth rates in the near term, we expect demand for ECE services to decrease over time, which may see a reduction in the size of the workforce in response. This won't necessarily impact service quality or adult-to-child ratios, because there will likely be smaller markets to serve.

Overall, workforce trends suggest that demand for ECE teachers is likely to remain at or above current levels, despite a potentially shrinking population aged under 5 years.

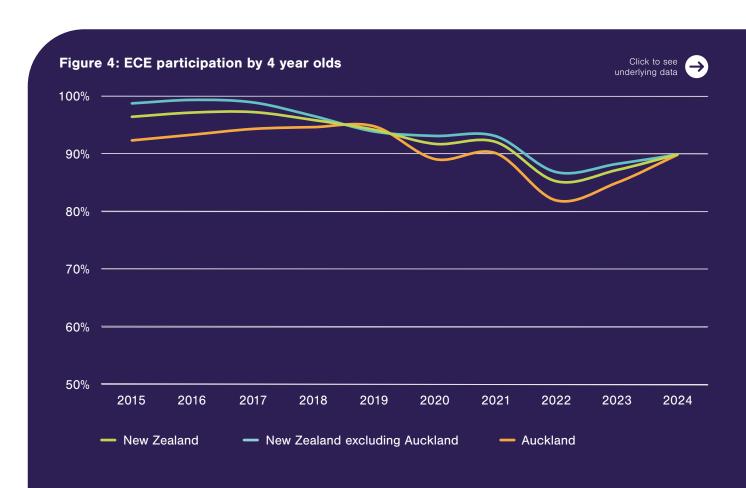


A marked improvement in participation rates at all ages could help offset stagnation in the under-five population over the next decade, and ease the forecast drop in demand.

It is also important to note that ECE workforce growth has departed from participation demand in the past. Despite declining participation between 2016 and 2019, the ECE workforce continued to grow in FTE and headcount. This reflects ECE services' commitment to ensuring service quality, and some stability in the workforce.

We reiterate, while the overall forecast appears sufficient at an aggregated national level, the regional story will be different. Detailed regional analysis is needed. Application of the Ministry of Education Equity Index is needed to understand supply and demand through an equity lens.

We have published the workforce forecast model, metadata, and underlying datasets alongside this report and strongly encourage further analysis. It can be found here: https://toitutewaiora.nz/earlychildhood-education-workforce/



We expect that demand for ECE services will be generally stable between now and 2035, with slow and manageable growth after 2027.

Participation in ECE has returned to near prepandemic levels, although small variations in the number of participants can be expected between now and 2030. The variation is expected because birth rates dropped as New Zealand moved into post-pandemic recovery, with the number of births in 2022 the lowest since 2015. This will impact on demand for ECE services through to 2027 as there will be fewer children of ECE age.

From 2030 to 2035, participation is expected to stabilise, eventually reaching numbers similar to those seen in 2024. This is due to a small recovery in birth numbers since 2022, but no expected increase in births between 2028 and 2033. However, if births, migration, and rates of participation in ECE move towards unusually high or low levels, this could significantly change expected demand.

The demand and supply model has only considered population change and regulatory settings (eg staffing ratios) as the primary drivers of demand.

Demand for ECE services is also influenced by arrange of economic, social, and political factors. ECE services are a critical enabler for parents to participate in work. Factors that affect demand for ECE services include household discretionary income, workforce participation rates of parents (and particularly of mothers), trends for office-based working compared to remote working, childcare subsidies and incentives, and unexpected events such as the Covid-19 Pandemic.



Factors affecting supply

We expect that there will be enough ECE teachers to meet the demand for services overall, if current trends continue. However, the supply of teachers may not meet demand in specific regions, or in specific types of services. This forecasting model presents a national-level perspective.

Staffing ratios

The Ministry of Education stipulates the requisite staffing ratios for each type of ECE service it funds. which varies by the age of children receiving the services. Staffing ratios are the ratio of adults to children. These are outlined at Appendix B. Of the ECE services who participated in the 2024 Early Childhood Education Census, staffing levels

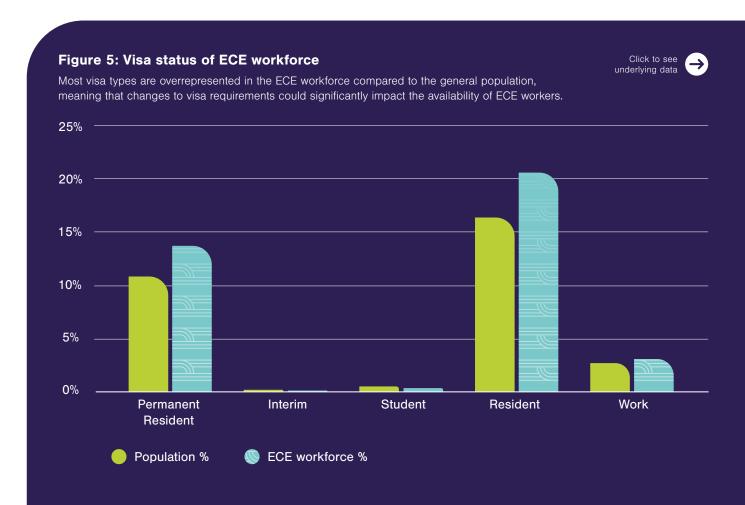
Attracting people to the ECE workforce

were generally above the requisite ratios.8

There have been numerous government initiatives in recent years to attract people to ECE and broader teaching professions. These initiatives are aimed at enticing people to undertake training to become a qualified ECE teacher, encouraging former ECE teachers in New Zealand and overseas to return to the New Zealand workforce, and attracting overseas ECE teachers to New Zealand, Initiatives have included recruitment campaigns, targeted scholarships, finders' fees, and overseas relocation grants.9

Pre-primary teaching is a Tier 2 occupation on the New Zealand Green List, which means that applicants who meet Teaching Council requirements for registration and practising certification can be considered for residency after just two years of employment in New Zealand.¹⁰

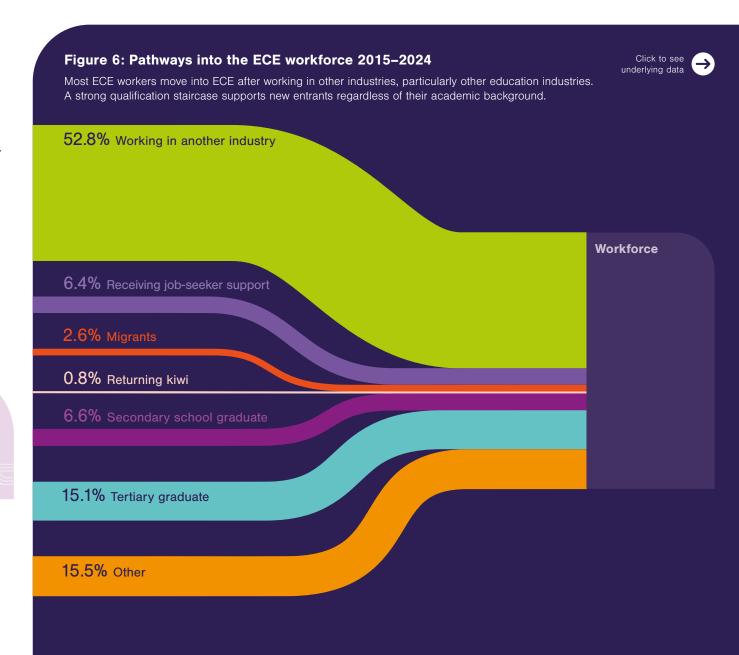
Around 38 percent of the workforce are not New Zealand citizens (compared to around 30 percent of the general population). Figure 5 shows the visa status of the ECE workforce in comparison to the general population. The ECE workforce is slightly more likely to hold resident or permanent resident status than the general population.¹¹



More than half of the ECE workforce joined after working in other industries. Those industries were predominantly the broader education sector, hospitality, retail, social services, business and contact centres. Around 15 percent of the ECE workforce joined after completing tertiary education. Others joined straight from school, were migrants or New Zealanders returning from overseas, and just over 6 percent of the ECE workforce moved off benefit support to join the ECE workforce.¹²

More than half of the ECE workforce joined after working in other industries





Retaining the ECE workforce

On average, someone will spend three to four years employed in the ECE workforce. In 2023, most of the ECE workforce had been employed for more than five years.

Retention of the ECE workforce is a pressing issue. Various studies and surveys have identified factors contributing to workers exiting the sector. These include increasing workload, workforce stress, and low pay.13

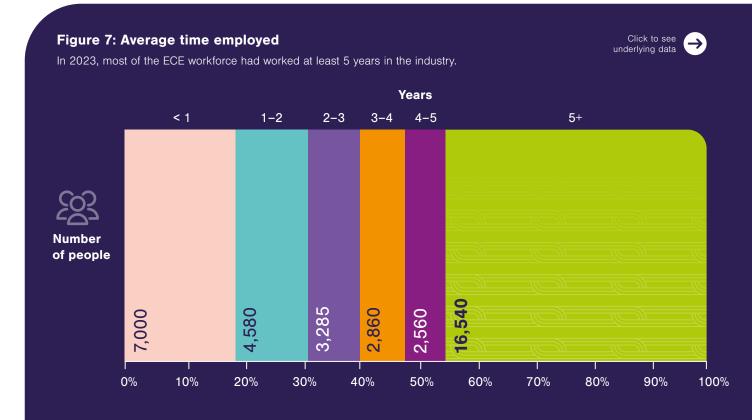
And despite initiatives to recruit for a more diverse ECE workforce, nearly one in four people leaving the industry between 2015 and 2024 were Māori - well above their one in five presence in the workforce.14 Other ethnic groups exit the ECE workforce at a lower rate than their presence in the workforce.

This suggests that it may be difficult to recruit and retain ECE teachers with Māori cultural awareness or capability.

Around 10 percent of those leaving the ECE sector in 2023 moved onto benefit support.¹⁵

One in four people leaving the industry between 2015 and 2024 were Māori well above their one in five presence in the workforce

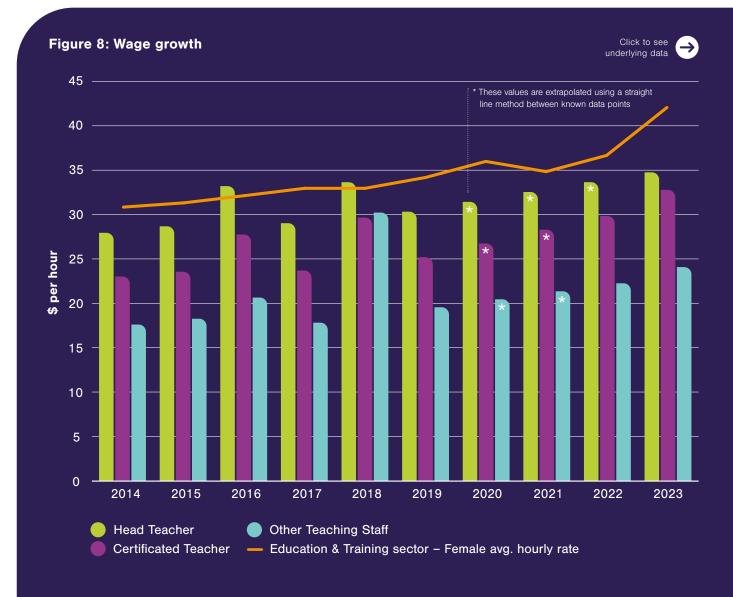




Remuneration

In 2024, the mean hourly rate for employees in the broader education and training sector was \$39.41. This was more than \$4 per hour more than the 2023 average hourly earnings for head teachers and certified teachers, and more than \$15 per hour above the hourly earnings for workers categorised as 'other teaching staff' in the 2023 Early Childhood Council Remuneration Survey.¹⁶

Despite increasing wages for head teachers, certificated teachers, and other teaching staff in recent years, ECE staff continue to be paid significantly less than their colleagues in other areas of education and training (Figure 8 refers). Introduced in 2021, Pay Parity is a government initiative to ensure minimum salary scales are offered across centre-based ECE services by offering higher funding rates to services that opt-in to participate. The intent is to recognise the value of certificated teachers' expertise. However, some argue that there is a disconnect between salaries and funding rates, and that Pay Parity may have contributed to the closure of some ECE services. The staff of the contributed to the closure of some ECE services.



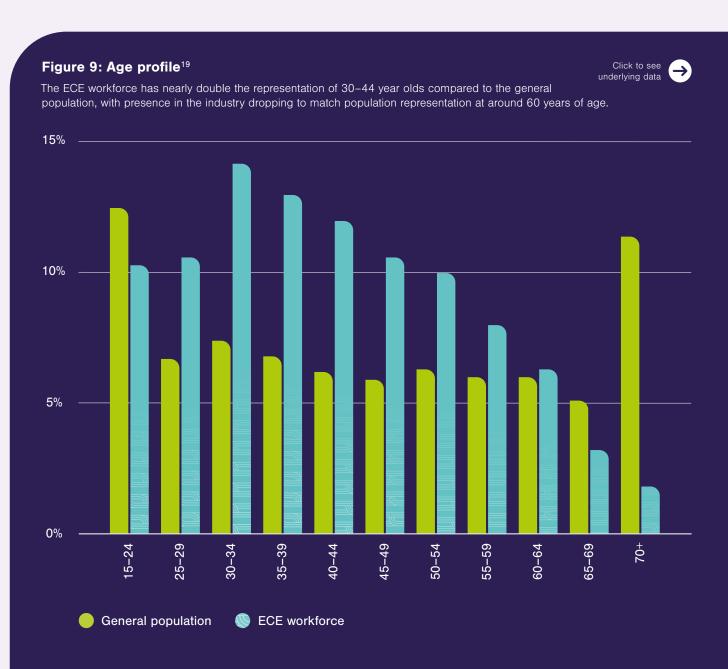
Workforce demographics

The demographic profile of the ECE workforce has remained static over time despite efforts to grow diversity. The future ECE workforce in Aotearoa New Zealand is likely to maintain its current demographic profile which is shaped by long-standing patterns in enrolment in training and qualification pathways.

Age Profile

The ECE workforce has nearly double the representation of 30-44 year olds compared to the general population. Those aged over 65 have much lower representation in the ECE workforce than representation in the population.

Nearly four in five of the ECE workforce are aged under 55. Demographics suggest that the workforce are likely to retire at 65, and may change industries before that age. While under 45s are present at nearly twice the rate of their representation in the general population, representation drops off rapidly after age 50.



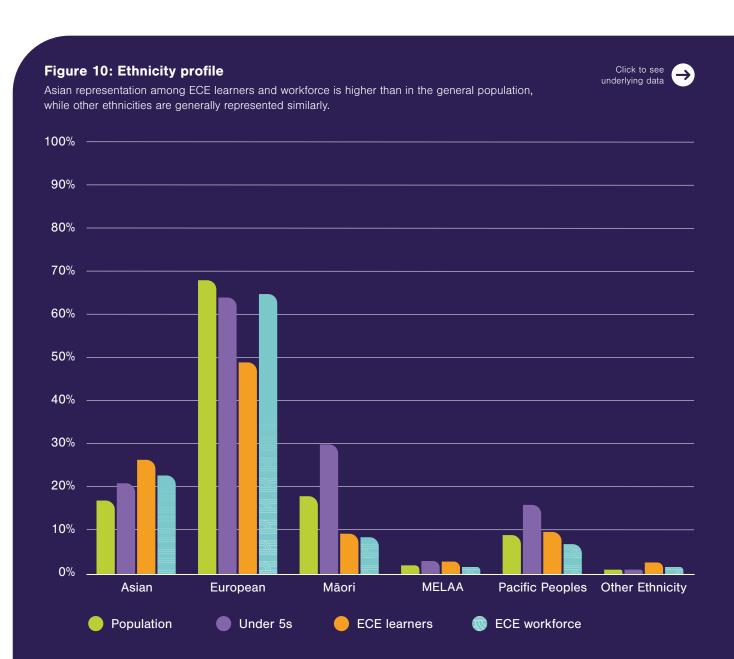
Ethnicity profile

Research and policy consistently confirm the ECE workforce needs to reflect the diversity of the communities it serves in order to improve equitable educational outcomes for Māori and other ethnic groups attending ECE.20

There have been numerous government initiatives to increase diversity in the ECE workforce, with a particular focus on supporting Māori and Pacific Peoples into the workforce.²¹ Māori and Pacific participation in the workforce is similar to the proportion of Māori and Pacific Peoples in the general population. However, these groups are under-represented when compared to the proportion of the population aged under five years, in which 30 percent of children are Māori and 16 percent are Pacific Peoples.

A growing Asian population in New Zealand has been met with similar growth in participation of Asian identities in ECE qualifications and the ECE workforce. Asian identities are well represented in the workforce (21 percent) when compared to the proportion of Asian identities in the general population (17 percent) and the proportion of population aged under five years (21 percent).22

However, current workforce diversity may not be sustained, as trends in enrolments show that Māori and Pacific identities are represented at a declining rate among learners enrolled in ECE qualifications below degree-level. Representation of both ethnic identities is down by at least 4 percent from 2018 to 2023. Representation of Asian identities is 28.7 percent, and this has been increasing over time.²³ Figure 10 refers.

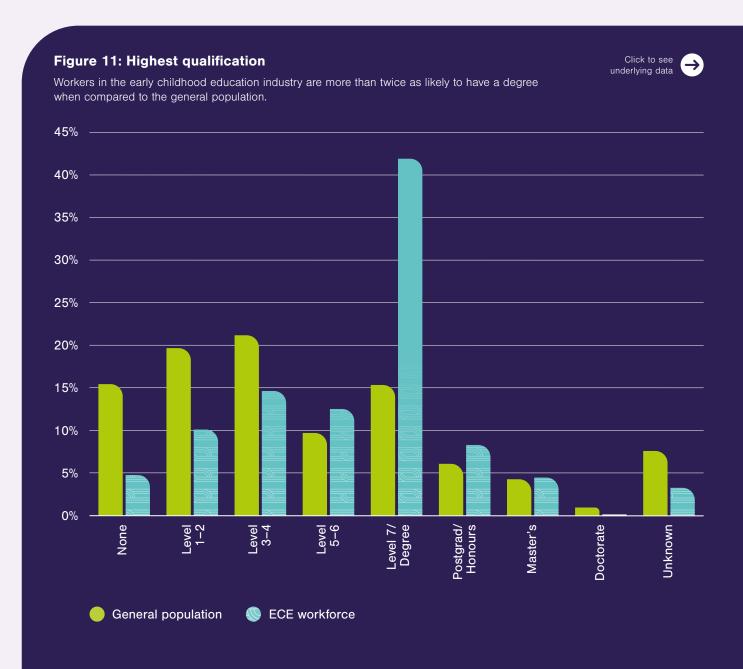


Workforce qualification

It is generally accepted that teacher training and qualification positively impact on children's learning outcomes. There are ECE-specific qualifications available at Levels 2 to 7 of the New Zealand Qualification and Credentials Framework, and there are numerous options for postgraduate study in the field.²⁴

Teaching qualifications at degree-level and higher are overseen by the Teaching Council of Aotearoa New Zealand and the New Zealand Qualifications Authority. Programmes leading to these qualifications are typically designed and delivered by universities and polytechnics. Only teachers holding these qualifications and a Practising Certificate issued by the Teaching Council of Aotearoa New Zealand are considered 'qualified teachers'.

Toitū te Waiora is the standard setting body for ECE qualifications at Levels 2 to 6 (certificates and diplomas). Programmes leading to these qualifications are typically designed and delivered by polytechnics and private training establishments. In 2023, the ECE workforce was more likely to hold a degree-level qualification than the general population. Figure 11 compares the highest level of qualification of the ECE workforce compared to the highest level of qualification for the general population.



The Ministry of Education stipulates the proportion of staff in an ECE service that must be qualified.²⁵ The level of qualification required differs and is dependent on the type of ECE service funded and the age of children receiving the services (as described in Appendices A, B and C). Overall, the majority of ECE services exceed the minimum requirements for qualified staff.²⁶

Figure 12 shows the proportion of qualified staff in each type of ECE service.

Below degree-level, the New Zealand Certificate in Early Childhood Education and Care (Level 4) is the prevalent qualification studied. Figure 13 on page 19 shows enrolments and completions in ECE qualifications at Levels 2 to 6 (below degree level). It is important to note that ECE learners often study part-time, so it is expected that enrolments will outweigh completions by at least two to one.²⁷ ECE services and tertiary education organisations that offer ECE qualifications say that qualifications at Levels 2 and 3 are essential for creating accessible qualification pathways, and that these qualifications are particularly valuable for those new to studying in New Zealand or who do not yet meet the entry criteria for Level 4 qualifications.

Figure 14 on page 20 demonstrates the qualification pathways that may be taken in the ECE workforce.

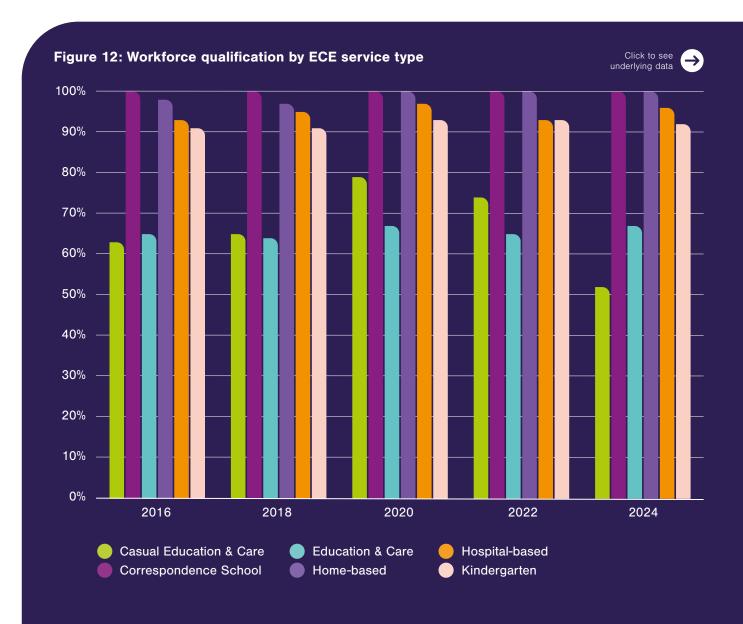
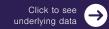
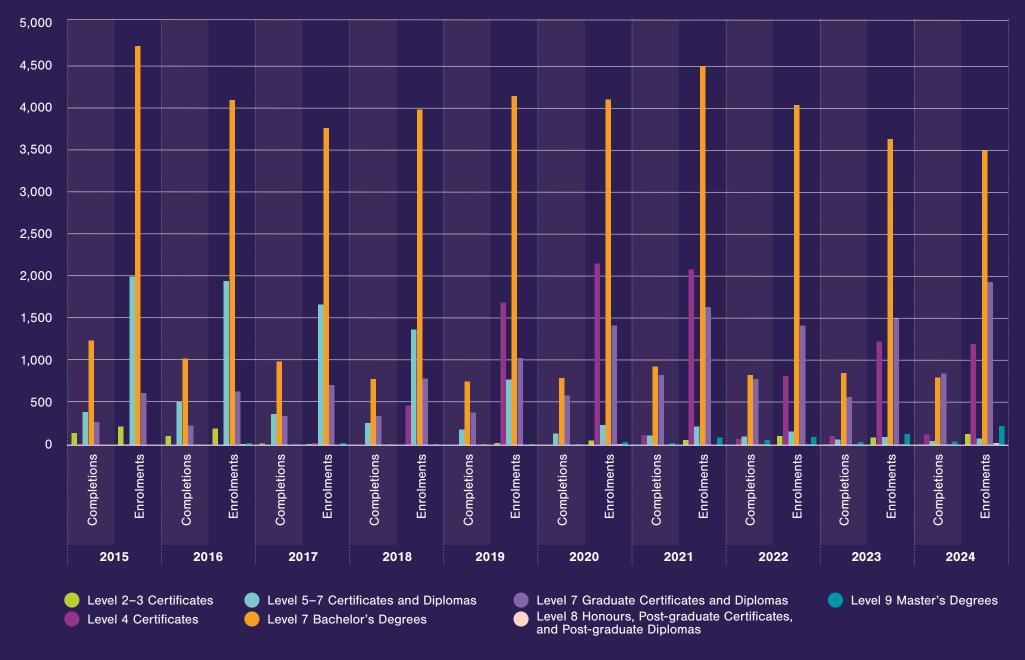
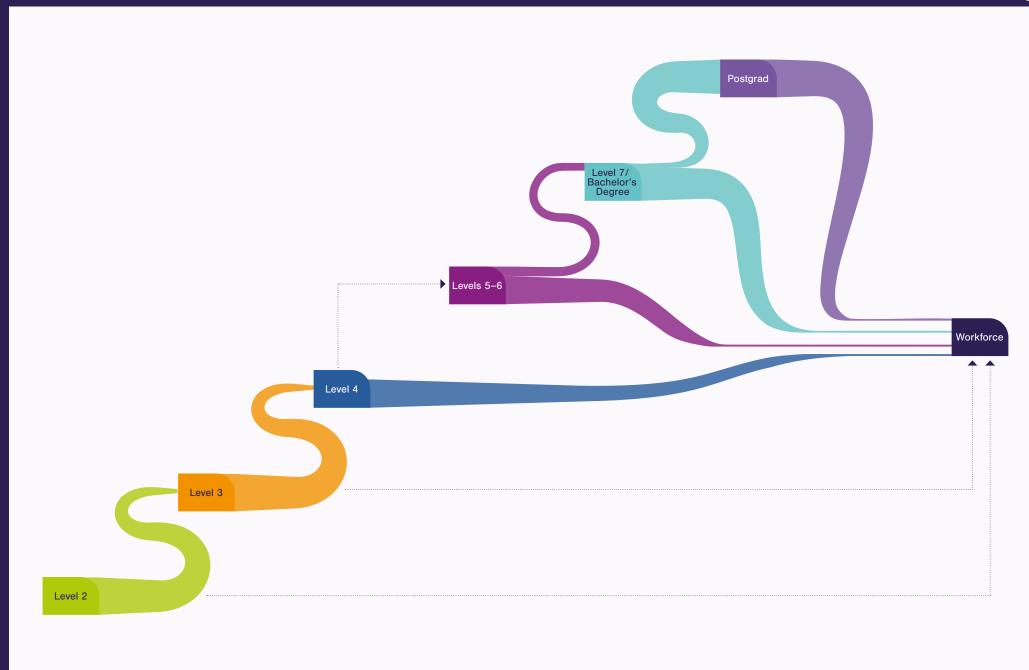


Figure 13: Enrolments and completions of ECE qualifications²⁸



Most people who study early childhood education at tertiary level pursue a Bachelor's degree. Since 2019, level 4 certificates have also attracted a notable number of enrolments. Due to a high incidence of multi-year and part-time study, completions are always expected to have much lower numbers than enrolments.





Health, safety, and wellbeing of the ECE workforce

Looking after children and babies is a significant responsibility, and there are numerous health, safety, and wellbeing risks associated with the ECE workforce. These risks include workplace stress, lifting and carrying children, moving equipment, violence, infections, slips, and falls.²⁹

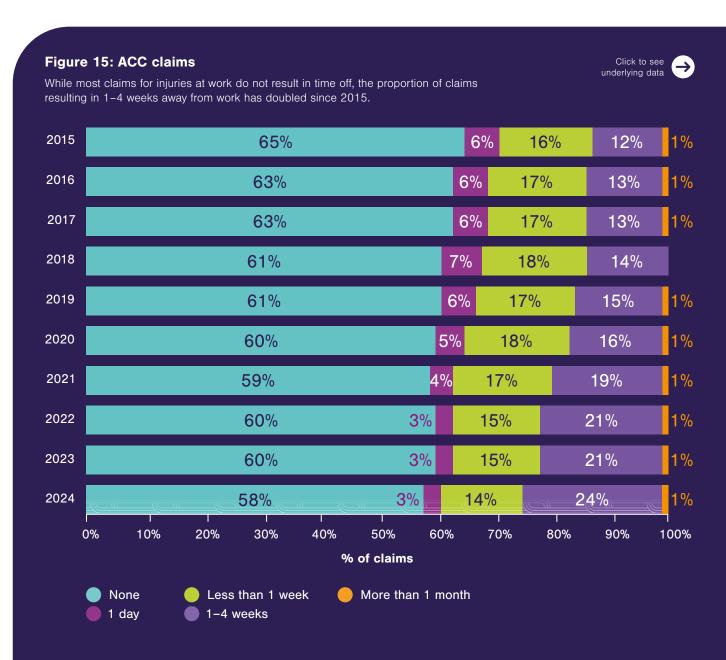
Numerous studies have identified that workplace culture, safety, and workplace stress is frequently experienced by the ECE workforce. Workplace stress is often cited as a factor in decisions to exit the workforce.30

Each year, around 5,000 ACC claims are made by ECE workers. While most do not require time off work, there is significant disruption to delivery of ECE services for the 40 percent of claims that do require time off work. Absences impede the ability of ECE services to meet regulatory and quality standards, interfere with daily operations, and increase staffing costs.

Since 2015, there has been an increase in the proportion of ACC claims resulting in one to four weeks off work across all sectors and industries. In 2015. 12 percent of ACC claims in ECE led to one to four weeks off work. By 2024 that had increased to 24 percent.

Workplace stress is often cited as a factor in decisions to exit the workforce

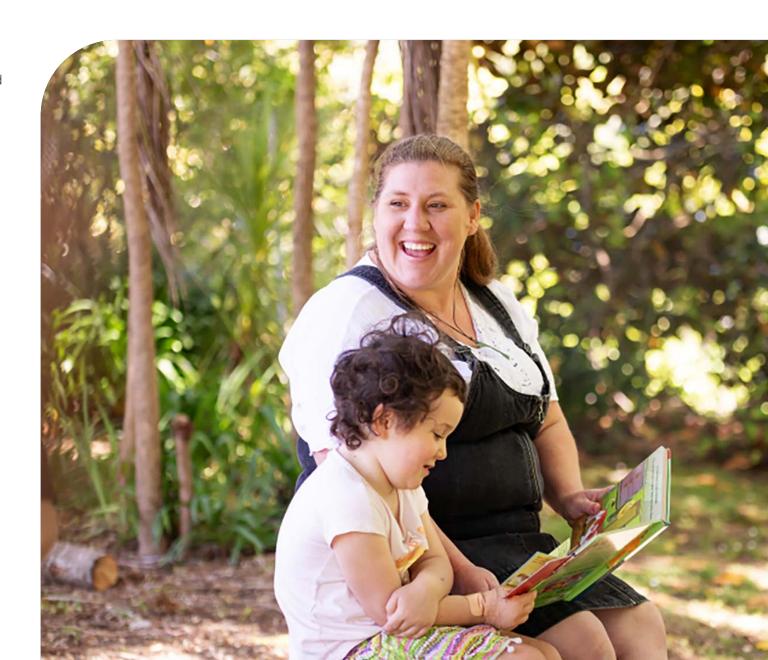




Future focus

Toitū te Waiora will be disestablished in December 2025. We have made the underlying data used in this report on our website. We have also published the ECE workforce forecast model so that others can build on the work we started.

From January 2026, the Education, Health and Community Industry Skills Board will assume the responsibilities previously held by Toitū te Waiora.



Appendices

Appendix A: Description of ECE services³¹

Service Type	Description			
Centre-based	Facilities that provide care or education for three or more children aged under six years old. While these centres may follow different educational philosophies, they must all meet Ministry of Education funding and regulatory standards.			
Home-based	Provide care or education in a home setting, either the child's, the educator's, or another nominated home. Like centre-based services, they must meet Ministry of Education funding and regulatory standards.			
Hospital-based	Provide care or education to three or more children under six who are receiving hospital treatment. They are licensed and include the involvement of Hospital Play Specialists, professionals with at least a Level 7 ECE qualification, and are typically registered with the Hospital Play Specialist Registration Council.			
	These services exclude care for siblings or staff children, which are considered centre-based.			
Te Kōhanga Reo	Licensed total-immersion Māori language programme for children under six, grounded in te ao Māori, a Māori worldview. Governed by Te Kōhanga Reo National Trust, they aim to revitalise te reo and tikanga Māori, while following government regulations and specific cultural guidelines.			
Playcentre	Licensed early learning services co-managed by parents and staff, under governance of Playcentre Aotearoa. They follow government regulations and offer child-led, play-based learning in a whānau-centred environment.			
Kindergarten	Licensed, teacher-led ECE services for children aged two to five years, offering sessional or full-day care. They are a form of centre-based service and are supported by Kindergarten Associations. They follow government regulations and receive a special government funding rate under a collective agreement.			
Pacific ECE and language nests	Licensed, teacher-led environment rooted in Pacific identifies, languages, and values. They offer bi-lingual and immersion pathways that preserve and pass on Pacific cultural knowledge within the Te Whāriki curriculum.			
Te Kura	Te Aho I Te Kura Pounamu (Te Kura) offers a free, individualised ECE programme for children aged two to six who can't attend local services due to location, health, or personal reasons.			

Appendix B: Additional information about ECE services

ECE Service Type	Centre- based	Kindergarten	Home-based	Te Kōhanga Reo*	Playcentres	Other>
Number of ECE services	2,666	674	248	416	382	3*
Proportion of all ECE services	53.9%	13.6%	5%	8.4%	7.7%	0.5%
Number of licensed places	148,433	26,672	15,965	11,909	10,523	560
Proportion of all licensed places	69.3%	14.1%	7.5%	5.6%	4.9%	0.3%
Number of children attending	139,041	27,565	9,887	8,512	9,592	381
Proportion of all children attending ECE services	71.3%	14.1%	5.1%	4.4%	4.9%	*
Number of staff (total)	28,087	4,573	511	*	*	126

^{*} Education Counts does not collect or publish data for this type of measure and service type(s)

> Other licensed services include hospital-based, casual education, and Te Kura ECE services

Appendix C: Staffing ratios by type of ECE service

Service Type	Age Group	Required Adult: Child Ratio
Kindergarten (all day or sessional)	Under 2 years	1:5
Kindergarten (all day)	2 years and over	1:10
Education & Care	Under 2 years	1:5
	2 years and over	1:10
Home-based Services	All ages	1:4
Hospital-based Services	2 years and over	1:10
	Under 2 years	1:5
Playcentre	All ages	1:5
Te Kōhanga Reo	Under 2 years	1:4
	2 years and over	1:6
Kindergarten (sessional)	2 years and over	1:15

Endnotes

- 1. More information on Toitū te Waiora can be found here: Home Toitū te Waiora
- 2. More information on the Early Childhood Council can be found here: Home | Early Childhood Council
- 3. Information about the ECE National Industry Advisory Group can be found here: National Industry Advisory Groups - Toitū te Waiora
- 4. The ECE workforce forecast model was peer reviewed by the Ministry of Education and the Public Service Commission. Ownership of the model will be transferred to the Ministry of Education in December 2025.
- 5. More detailed participation data and graphs are available in the dataset accompanying this report.
- 6. More detailed participation data and graphs are available in the dataset accompanying this report.
- 7. Department of Economic and Social Affairs, United Nations (2025) World Fertility 2024. https://www.un.org/development/desa/pd/sites/www.un.org.development. desa.pd/files/undesa_pd_2025_wfr_2024_final.pdf
- 8. Ministry of Education. (2025, February). Early Childhood Education Census. https://www.educationcounts.govt.nz/statistics/services
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- 11. Te Mata Rauranga Workforce Skills Data and Insights. (2025, April). *Toitū te* Waiora Workforce Dashboards. https://www.workforceskills.nz/sector-insights/ toitu-te-waiora/workforce-2
- 12. Te Mata Rauranga Workforce Skills Data and Insights. (2025, April). *Toitū te* Waiora Workforce Dashboards, https://www.workforceskills.nz/sector-insights/ toitu-te-waiora/workforce-2
- 13. Selected examples include:
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