

Adult and Community Education (ACE) Environmental Scan 2025

Full Report

Completed for ACE Aotearoa
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Summary of findings

This Adult and Community Education (ACE) Environmental Scan was commissioned by ACE Aotearoa to provide an updated understanding and current insights into the scope, scale and impact of ACE in New Zealand. It includes consideration of how societal changes and events experienced in recent years have impacted ACE since ACE Aotearoa's 2019 and 2021 scans.

ACE provision is diverse and wide reaching

This scan has shown that there is some form of ACE coverage across all territorial authorities of New Zealand.

ACE is delivered in many forms by diverse providers (funded and non-funded) to learners from many different backgrounds who engage in ACE for a variety of reasons.

ACE provides lifelong learning opportunities for adults and communities across all life stages. ACE courses exist across a continuum of hugely diverse subjects and types.

Features that facilitate ACE learner participation and outcomes

The scan has identified several distinctive features of ACE that are key facilitators to learner participation, continued engagement and positive pathways and outcomes – including for learners who have not previously had positive learning experiences. These features include:

- diverse ACE courses and providers that meet multiple needs and interests
- wide geographical reach
- provision that caters for all and is easily accessible, including for learners previously underserved
- expertise in foundation learning
- quick adaptability to respond to need and demand
- non-threatening learning environments
- providers that are representative of and embedded in their communities
- an ethos of non-competitive delivery.

ACE enriches lives

ACE is recognised as being transformative to people's circumstances and lives. Providers identified that their ACE provision builds foundation and life skills, supports health and wellbeing, strengthens cultural identity and enables personal growth through learning and developing new interests, knowledge, skills and competencies. ACE also contributes to positive community change and resilience, fostering knowledge and awareness of societal issues, active citizenship, social cohesion and environmental issues.

Characteristics of the ACE tutor workforce

There is limited information about the ACE workforce available from national and international literature.

ACE providers responding to the survey for this scan identified a predominantly female and mature tutor workforce with more tutors being in the 41–65 age range.

All three ACE environmental scan surveys completed since 2019 have shown that tutors are valued and selected for their subject matter knowledge, which remains the main selection criterion for many providers. Different courses and organisations require teaching- or adult educator-related experience and/or qualifications, but these criteria appear less prevalent, particularly in more recent years. For each survey, about 65% of providers have reported that all their tutors are paid, while about 12% have indicated that all or most of their tutors are volunteers.

Conversations with providers indicated variance in whether tutors are paid only for their teaching time, or also for aspects such as lesson planning and professional development time. A key barrier to participation in professional development is the inability to pay tutors for this time. Tutors' lack of time to attend is also a barrier where tutors have other employment and voluntary roles.

ACE learners are diverse in demographics and circumstances

The total number of ACE learners nationwide is unknown due to the absence of a national register and because national data is predominantly for funded provision only. Available figures are variable and conservative. These point to ACE reaching more than 90,000 learners each year, though this number is likely far greater.

ACE learners are diverse in age, ethnicity and background. New Zealand European and Māori learners are strongly represented in ACE, though for funded provision, this depends on the type of provider and the nature of the courses they deliver. For example, about 40% of funded learners enrolled with Rural Education Activity Programmes (REAPs), Community Education Providers and Te Pūkenga subsidiaries in 2024 were Māori. For Private Training Establishments (PTEs), Māori enrolments were 11%, but Asian enrolments were 51%, reflecting the high provision of English language courses by PTEs.

Overall, there seems greater female than male participation in ACE in New Zealand. There is strong participation in ACE by older learners. Except for 2024, highest TEC-funded enrolments since 2018 have consistently been in the 60+ age group. All ACE environmental scan surveys have indicated strong participation of learners in the 45–64 age group.

Learners come to ACE from a wide range of backgrounds and for diverse reasons. More than half (56%) of 2025 survey respondents identified that their learners come to ACE with no or low previous qualifications. Respondents identify strong participation from learners who may be retired or semi-retired, in part-time or full-time employment, unemployed or newcomers to New Zealand. More than 40% identify that their learners are typically upskilling.

Providers commonly reported a shift in learner needs in recent times, with learners presenting with greater challenges and more complex needs.

ACE contributes to improved wellbeing as well as educational outcomes

Across all three ACE environmental scans (2019, 2021, 2025), there are core outcomes of ACE that are consistently reported by providers. These are:

- improved self-confidence and self-belief
- greater social connection and participation
- improved skills, knowledge and cognitive abilities
- contributing skills and knowledge to communities

- improved health and wellbeing
- enhanced cultural knowledge and identity
- improved literacy, numeracy and language
- progression to further study or training
- employment.

This scan has highlighted the importance of not just understanding and valuing the educational-, employment- and economic-related outcomes of ACE, but also the significant wellbeing and quality-of-life-related outcomes reported, and the contribution of ACE to government and societal priorities. ACE is also reported as contributing significantly to dimensions of social cohesion, including increasing people's sense of belonging, sense of worth and connectedness.

As is reported in other jurisdictions, there is a lack of recognition and evidencing of the social wellbeing outcomes that ACE contributes to, and its social impact in New Zealand.

There is no systematic evidencing of ACE learner outcomes at a national level, including the contribution of ACE and the difference it makes to government-funded and targeted educational delivery areas of priority.

As the 2019 scan found, there is also a gap in understanding the ACE experience, and the difference ACE makes from the learner perspective at a national level.

ACE's national profile needs strengthening

A consistent theme from the scan research is that ACE is under-recognised and undervalued. Providers considered that outside the sector, there is a lack of understanding about the diverse ACE courses provided and the impact and value of ACE. There is a common view that there is a need to nationally raise the profile of ACE and increase understanding of the significant value it contributes.

Funding is the most pressing challenge identified

Government funding decisions over several decades have had a substantial influence on the scope and scale of ACE in Aotearoa. Funding stands out as the sector's most significant pressure point. This is partly because, in recent years, ACE providers are responding to learners with increasingly complex and diverse needs, while working to remain highly accessible and responsive to their learners and communities.

Learners' increased needs and decreased funding are key trends most experienced in recent years

The three trends most identified and experienced by more than 40% of 2025 survey respondents in recent years were:

- learners presenting with more complex needs and challenges
- decreased funding
- changes in learners' circumstances and reasons for enrolling.

Respondents linked these trends to the increased cost of living pressures, changes in government and policy, COVID-19 and increased unemployment.

Ensuring the full potential of ACE

Despite key challenges and trends, 2025 survey respondents indicated confidence that their organisations are well positioned to meet the needs of learners and communities into the future.

ACE's distinctive strengths, such as accessibility, flexibility, responsiveness and community connection, are highlighted by the UNESCO Institute of Lifelong Learning as important to build the competencies needed to adapt and thrive in times of rapid change and uncertainty, including through experiences of conflict, extreme climate events and technological change (UIL, 2024).

Three key areas of focus emerge as important to ensure ACE can continue to fully contribute to the social cohesion, wellbeing, educational and economic outcomes evidenced in this scan: strengthening ACE's visibility, building wider understanding and recognition of the value ACE contributes, and increasing levels of funding.



1. ACE Environmental Scan: Background and purpose

ACE Aotearoa is the lead organisation for the adult and community education (ACE) sector in Aotearoa, and a membership organisation representing the wider sector. Its focus spans strategic sector leadership, capability building and sector coordination.

In 2025, ACE Aotearoa commissioned this environmental scan of the sector to provide current understanding and insights into the scope, scale and impact of adult and community education in New Zealand. This included consideration of the impact of significant events that have affected, and continue to affect, society since the COVID-19 pandemic.

The scan will contribute to ACE Aotearoa's work to inform a clear vision, priorities and direction for the future of the ACE sector.

This scan builds on the inaugural 2019 ACE Environmental Scan, as well as insights from the subsequent 2021 scan survey and three case studies. The 2021 survey replicated the 2019 survey instrument, with an added question area to understand the impacts of COVID at that time.

1.1 Scope

The primary focus of this scan has been to understand more about:

- the scope and scale of ACE delivery, including who delivers ACE, how it is funded and what ACE looks like in Aotearoa today
- trends and challenges experienced with ACE delivery, including impacts of significant events such as COVID-19, extreme weather events, the economic downturn and technological advancements
- ACE capability and capacity, including information on the ACE workforce
- the learners who participate in ACE
- the outcomes and value-add for learners as a result of ACE participation
- future focus considerations.

Key insights for this scan have come primarily from the perspective of diverse providers across Aotearoa who provide ACE in its many different forms.

TEC data has also been considered to provide a macro understanding of the breadth and scale of ACE-funded delivery over time.

Understanding ACE today has also been supported by the review of findings from the surveys of ACE providers as part of the 2019¹, 2021 and 2025 ACE environmental scans, which have largely used the same survey instrument and survey questions.

¹ The ACE survey that informed the 2019 ACE Environmental Scan report closed at the end of 2018 but was reported in 2019 – for simplicity, the survey is referenced in this report as a 2019 survey.

1.2 Approach

As with the 2019 ACE Environmental Scan, an iterative mixed-methods approach was used. This comprised a review of current literature, documents and web-based information about ACE, an online survey and in-depth conversations with ACE providers. Data provided by the Tertiary Education Commission (TEC) about funded ACE providers and courses has also been reviewed.

1.2.1 Review of literature, documents and web information

The research for the scan included a review of published literature and documentation, accessed through an internet search for material about ACE produced since 2018² and relevant to the scope of this work. This scan focused on Aotearoa literature and documentation but also included recent international material. This step was ongoing across the entire research process, informing the revision and addition of survey questions, qualitative conversation questions, and the analysis of findings from the survey, interviews and TEC data.

1.2.2 Online survey of ACE providers

An online survey of ACE providers was conducted between early September and late October 2025, and was open for seven weeks.

The survey was administered by ACE Aotearoa through the platform SurveyMonkey. ACE Aotearoa provided the survey link to ACE providers identified through its member database and to e-news subscribers, and encouraged participation.³

The survey instrument largely replicated the instrument used for the 2019 and 2021 ACE environmental scans. Some questions and response options were revised, and others added to the initial instrument.⁴ That process of revision was informed by a full review of the 2019 and 2021 survey questions and the findings and responses provided, including 'other' responses and comments shared. Qualitative insights and findings from the 2019 ACE Environmental Scan also informed this review. Questions added to the 2025 survey reflected an intended focus on understanding the changes and impacts experienced as a result of significant events that have taken place since the last environmental scan, such as COVID-19, extreme weather events and the economic downturn.

A total of 110 ACE providers completed the 2025 survey. The 2019 survey had 73 respondents and the 2021 had 72. The surveys have been anonymised, so it is not possible to know whether the same respondent organisations have completed each survey. However, because the survey has been administered to ACE Aotearoa's member base and subscribers each time, it is likely that a core of the respondents have been from the same organisations.

The majority of the 2025 survey respondents (78%) receive some form of government funding for their ACE delivery, while 22% do not. More than half of the survey respondents are community organisations. A breakdown of the percentage and number of respondents by 'provider type' is in Appendix A. Appendix B shows the diverse types of organisations that responded to the survey.

² The date from which research for the last ACE environmental scan was completed.

³ Providers were asked to allocate just one person in their organisation to respond to the survey and with oversight and understanding of the various aspects of their service, including about their funding, delivery, tutors, learners and learner outcomes.

⁴ The survey contained 36 questions that mostly offered specific response options to be answered. A number of questions gave an 'other' option, or asked respondents to provide further comment to understand their answer choices.

The survey asked ACE providers about their organisation, nature of ACE provision, courses, learners, funding and costs, tutors, governance and management, outcomes and value-add of ACE provision. It also asked about key challenges and trends experienced in recent times, and future-focused related questions.

1.2.3 In-depth conversations with ACE providers

Semi-structured conversations were held individually with 10 ACE providers, involving 14 participants, between November 2025 and January 2026. The conversations were guided by prepared questions, which enabled exploration of the survey findings and the scoped focus areas of the environmental scan.

Participants were purposefully selected to achieve broad sector representation and were from ACE organisations representing older people, Māori, Pacific peoples, Deaf people, a Workers' Educational Association (WEA), an ACE school-based provider, Rural Education Activities Programmes (REAP), libraries, and a provider of English language courses for former refugees and migrants. Half of the participating organisations receive some form of government funding and half do not.

Interviews were conducted by online video meetings (Zoom), except for two that were by phone. Conversations typically ran for one hour, though a few went longer, up to two-and-a-half hours.

1.2.4 Analysis

Findings from the survey and qualitative conversations were separately analysed and considered collectively. Findings were also considered alongside the previous environmental scan survey findings and reports. The findings were also examined in relation to key themes from the literature and documents reviewed.

1.2.5 Report

This report brings together the key findings from all components of the research and highlights the picture of ACE in Aotearoa that has emerged in relation to the key parameters informing the environmental scan. Accordingly, the report is structured as follows:

- Overview of ACE in Aotearoa
- Scope, scale and breadth of ACE provision
- ACE workforce: capability and capacity
- ACE learners
- Impact and value of ACE: Learner outcomes
- Key recent challenges to ACE delivery
- Key recent trends
- Future focus.

1.3 Challenges and limitations

The main challenges and limitations of this scan are similar to those identified in the 2019 ACE Environmental Scan report, namely:

- It remains impossible to understand the full scale of ACE provision in Aotearoa, given the numerous people and providers who facilitate ACE that is not funded by the TEC and the absence of any systematic collation of such information.
- Aside from the information regularly published by ACE Aotearoa highlighting ACE providers, learners, people, communities and events, there is limited recent literature published about ACE in Aotearoa. In particular, there is a dearth of data and information published about non-TEC funded ACE.
- ACE learner enrolment data published on the Ministry of Education 'Education Counts' website differs from data provided by the TEC and does not provide data for all of the provider types included by the TEC. TEC data provides important insights into the breadth and scale of funded ACE delivery, but only for funded ACE provision. There is no equivalent collection of data for providers and learners engaged in non-funded ACE.
- Whereas TEC funding is allocated to core priority provision, and data is collected showing providers and learners engaged in this provision, there is no national data on the impact and outcomes of this provision and the contribution that ACE makes in these priority areas. Providers' perspectives on the impact and outcomes of their provision, as gathered for this and previous scans, contributes to fill this gap.
- With the completion of three ACE environmental scan surveys that have used largely the same survey tool, administered in the same way and completed by similar types of ACE providers, it has been possible and useful to compare the findings over time. However, because the specific organisations responding to each survey were not necessarily the same, observations of similar or different sector trends or differences over time can only be considered as indicative rather than conclusive.
- Because the survey and qualitative research completed for this scan comes from the perspective of ACE providers and individuals with oversight of their organisations, it does not include the direct insights of ACE learners and tutors. Moreover, there is no national survey or data source, nor seemingly published research, which has widely captured learners' perspectives and experiences of ACE and the difference it makes. Published information available about the ACE workforce is similarly limited.

Despite these limitations, the participation of ACE organisations in the environmental scan survey and in-depth conversations has provided important insights into ACE in New Zealand, including the impact of significant societal events and changes in recent times. These insights, synthesised with insights from the literature, TEC funding information, and findings from previous ACE environmental scans, contributes to build and inform an understanding of ACE in New Zealand today and over time.

2. Overview of ACE in Aotearoa

2.1 What is ACE?

ACE is a part of the tertiary education sector in Aotearoa and is distinct for its less formal provision of lifelong learning. It is delivered in many different contexts, and encompasses significantly diverse providers, courses and learners from across life stages.

ACE exists across a continuum of provision. At one end are personal-interest courses developed and delivered to interested community members. At the other are programmes that lead to lower-level qualifications. In between, the diversity is significant, including wellbeing-focused courses, knowledge-building courses in areas such as active citizenship and sustainability, foundation courses that build literacy, numeracy and language, and core skills, and courses that build cultural identity and language, grow skills and knowledge in niche areas, and provide professional and technical development opportunities.

ACE learning might take place in a classroom, but equally it can take place outdoors, on a marae and in settings natural to the people who take part and the learnings that take place. As an ImpactLab report completed by English and Tanioka (2023) for ACE Aotearoa summarised:

“Adult and Community Education (ACE) is a process whereby adults choose to engage in a range of educational activities within the community. The practice fosters individual and group learning which promotes empowerment, equity, active citizenship, critical and social awareness and sustainable development. ACE occurs alongside the formal education system and is therefore accessible to all. It promotes a culture of lifelong learning. It happens in a wide range of contexts in both structured and spontaneous forms, all of which have their own value” (slide 3).

2.2 Long history of ACE in Aotearoa

A historical snapshot of ACE in Aotearoa, along with its developments up to 2021, including the advent of the COVID-19 pandemic, is outlined in an article by Amundsen (2020) published in the Australian Journal of Adult Learning. A high-level summary of the key post-colonial developments over this period identified in that article can be found in Appendix C.

Amundsen discusses how traditionally (and contemporarily) Māori learnt on the marae by listening and participating in oratory, learning informally through iwi and whānau relationships, and formally through systems such as whare wānanga. Post-colonisation, the earliest example of ACE is from 1842. Amundsen’s coverage of key milestones shows the ACE sector has experienced a turbulent history in our country. The article identifies how changing government policy and funding of ACE has impacted the sector over time, including the withdrawal and narrowing of funding for ACE organisations and programmes. The timeline shows the ACE sector is resilient. It refers to the establishment and experiences of different ACE organisations who, despite being impacted by funding and other pressures, remain viable and a core part of the ACE sector today.

The Amundsen article ends with the advent of COVID-19 lockdowns and significant disruption to ACE delivery, including barriers to digital access. Around the same time in 2021, ACE Aotearoa conducted an environmental scan survey, which also asked providers about the effects of COVID-19 on their ACE delivery. The main impact was the need to use mixed delivery methods to continue offering programmes of learning. For 35% of respondents, services continued as normal, whereas 26% halted or removed some services, and 22% added new services. A quarter of respondents indicated that learner numbers had increased, whereas for 31%, learner numbers decreased.

This environmental scan follows on from that time, to provide a snapshot of what ACE looks like in Aotearoa several years on, including insights from ACE organisations on the trends they have experienced over these years.

2.3 Distinct features of ACE

The 2019 ACE Environmental Scan reported “ACE is described as unique for its ability to reach and engage learners in ways that other parts of the education sector cannot” (Chauvel, 2019, p. 31).

As reported by Devlin and Wu (2022), ACE:

“offers a gateway for all adults to return to learning at any stage along the learning timeline, no matter their age, gender, culture, ability or previous educational experience or attainment. The sector recognises that there is no ‘traditional student’, only a spectrum of learners with their own needs and preferences to be taken into account” (p. 46).

Across the reviewed literature, the ACE sector, and participants to the 2019 and 2025 scans, the following are distinct, valued and commonly described features of ACE:

- **Diverse delivery**

There is significant diversity in ACE course provision catering to wide ranging needs, interests and life stages.

- **Wide geographical reach**

ACE is delivered in some form everywhere in Aotearoa.

- **Caters for all**

ACE is inclusive and open to people from all backgrounds, abilities, learning and life stages.

- **Reaches the underserved**

ACE can make a significant difference for those who have been underserved through mainstream, formal education:

“ACE in Aotearoa serves a critical role in supporting the education, social engagement and connections of people in our regions and communities, especially for adults and young people who missed out on early education opportunities” (2025 survey respondent).

- **Quick to adapt**

ACE providers can quickly develop and deliver new courses in response to need and demand, including innovative and bespoke courses developed alongside, and tailored to, learners and communities.

- **Highly accessible**

Typically, ACE courses are relatively short in duration and of no or little financial cost to learners and have no entry criteria. ACE offers viable learning pathways for those who may be financially disadvantaged, and/or have limited time.

- **Non-threatening**

ACE learning spaces and environments are informal, strongly supportive, safe, inclusive, caring and community focused. Typically, there are no exams or assessment, which removes stress from learning.

- **Expertise in foundation learning**

“The ACE sector has strong expertise in delivering basic adult education programs (e.g. language, literacy, numeracy and digital) that offer pathways into further learning and work, as well as essential life skills” (Devlin & Wu, p. 46).

- **Representative of communities**

ACE organisations are representative of their communities, providing spaces specifically where people feel comfortable and can learn with others from the same backgrounds and cultures; for example, for men, Deaf people, Pacific peoples, older people.

- **Embedded in communities**

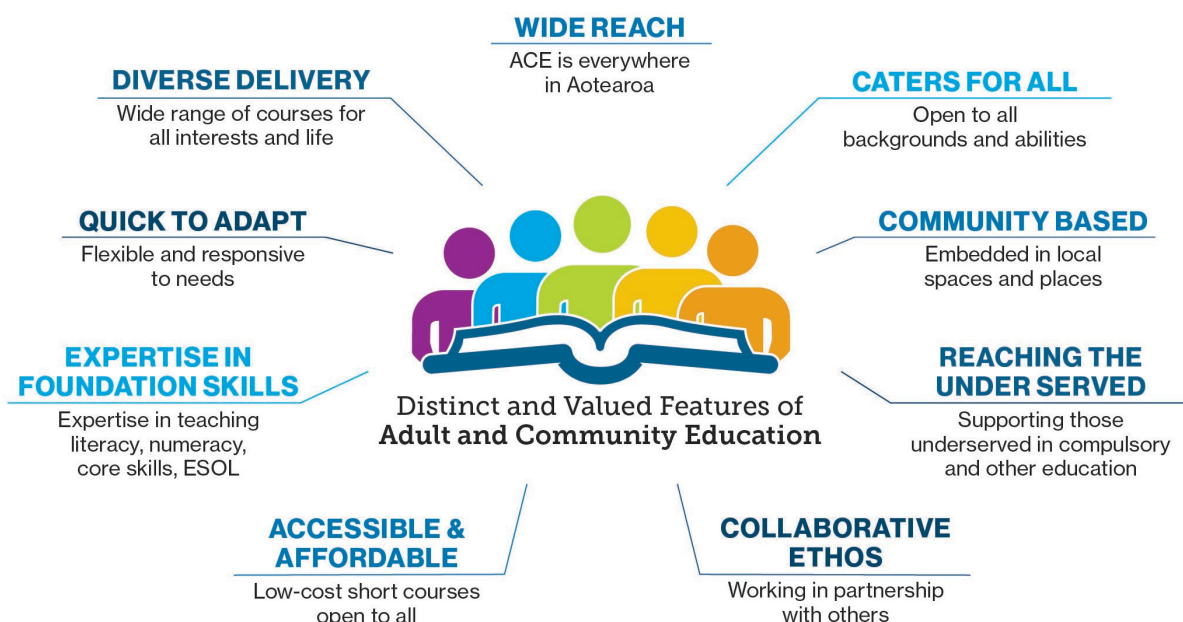
ACE is embedded in local communities, often delivered in non-traditional settings such as community centres and spaces, libraries, churches, marae or outdoors.

- **Ethos of non-competitive delivery**

ACE providers often work in partnership with others to ensure the needs of communities and learners are well understood and met. As noted from interviews conducted for the 2019 scan, ACE providers *“showed a purposeful focus on seeking to avoid competition and the same delivery as other local providers”* (though funding challenges were identified as a potential threat to this) (Chauvel, 2019, p. 10).

These valued features of ACE are summarised in Figure 1 below.

Figure 1: Distinct and valued features of ACE⁵



These are defining characteristics of ACE that are important to recognise, value and sustain. These features are central to the hallmark of successfully reaching and engaging people from all life stages and backgrounds, including those who have been disengaged from education and employment, and enabling and supporting them into new pathways.

When announcing a funding boost to the sector in 2020, former Minister of Education Chris Hipkins, recognised that:

“ACE is accessible, inclusive and tends to be relatively inexpensive, which reduces barriers to participation and provides pathways to employment and further education and training.”

ACE organisations spoken with for this scan discussed how the high relevance of ACE courses, alongside welcoming and supportive learning environments, are key to initially encouraging learners to participate and engage. Once they start, this is often the beginning of a learning pathway as learners discover multiple opportunities available and experience enjoyment and success.

Different participants of the scan also commonly stressed the importance of the flexibility of ACE to learner success:

“Flexibility is important. The time, the place, the setting. Learning is at the time that suits the learners. If the time doesn’t end up working, we will change it. For example, moving a language class to weekends because the evening didn’t work. Learning takes place at people’s own pace. Also, learning takes place in settings where people feel comfortable and is not limited to a classroom.”

⁵ The diagram is AI generated but was created solely based on the information conveyed by the author in the text describing these features. Post-creation, the diagram was revised to ensure it accurately represented the text. Aside from this diagram, no AI tools were used to prepare this report.

“We can be so flexible and can adapt, respond, pivot and react quickly. Unlike other education settings, it doesn’t take months to write a new course and get it up and running. Students talk to the tutors about the courses they want. If there’s no such course and demand, then we’ll create a new course, and quickly. We did this for AI. We got several AI courses up and running for different contexts and they were full.”

“Flexibility is key. You can learn in your own time, in your own way and space. You are not told this is how you have to learn, this is how you have to be assessed. This is key to success, as is the level of support that is provided.”

2.4 Providers of ACE

ACE is delivered in many forms, including by individuals with a particular passion and skill, private businesses wishing to give back to their communities, community organisations or groups, or tertiary education providers. Learning may not even involve a tutor but may occur through the sharing of ideas and knowledge in a group setting. ACE organisations are highly diverse and representative of different communities.

ACE delivery in New Zealand is a mix of government and non-government funded provision. The Tertiary Education Commission (TEC) is the government agency that allocates, administers and reviews funding specifically for ACE. Organisations that do not receive TEC ACE funding may of course be funded by other government agencies for programmes and services not classed as ACE, but which contribute to adult and community education and lifelong learning.

2.4.1 Non-TEC funded providers

Non-TEC funded ACE provision is financially supported by learner fees, community funding, private organisations, donations, grants and bequests. Large, established providers of ACE, for example, some Workers’ Educational Associations (WEA), Men’s Sheds, SeniorNet, U3As, are not funded by the TEC. Unfunded ACE provision is also delivered by diverse individuals, entities and community organisations that include:

- women’s centres
- libraries
- digitally focused organisations
- organisations representing prisoners
- universities
- culturally identified groups and organisations.

2.4.2 TEC funded providers

TEC ACE funding is categorised in relation to three types of ACE for different providers as set out below.

- **ACE (Schools) fund**
this is funding for provision by a state, state integrated or charter school.
- **ACE funding for Search and Rescue and Emergency Management**
provided by two Government Training Establishments (GTEs).

- **ACE (Communities) fund**

this is funding provided for the delivery of ACE by:

- Wānanga
- Te Pūkenga subsidiaries, as they were called prior to 2026 (and previously Institutes of Technology and Polytechnics)
- Private Training Establishments (PTEs)
- REAP
- Community education providers.

In 2024⁶, the TEC funded a total of 77 providers. Table 1 shows the number of ACE providers funded by these provider categories:

Table 1: Number of providers funded by TEC in 2024 by provider type

Provider type	Number funded by TEC in 2024
PTE	23
Community Education Provider	22
School	14
Te Pūkenga subsidiary	12
Wānanga	2
GTE	2
REAP	2
Total	77

Source: Tertiary Education Commission data

It is impossible to know the number of non-funded, and overall total number of providers who deliver ACE in Aotearoa, as there is no national register of all providers or self-reporting provision. The 2019 scan identified a minimum of 600 organisations but that the real number would be much higher.

2.5 Geographic coverage of ACE in Aotearoa

There is some form of ACE coverage across all territorial authorities in Aotearoa. When considering the ACE coverage provided by the survey respondents of this scan alone, all of the possible geographic territorial authority response options were selected by the 110 respondents when asked where they delivered ACE.

TEC data showing funded provider’s geographic delivery also shows wide coverage by territorial local authority. Appendix D provides a table of this provision each year from 2018 to 2024 for each authority. The data reflects the number of funded providers delivering in a particular area. However, where this shows one or two providers delivering in an area, it may not necessarily mean limited provision, as these could be large providers delivering a range of ACE services. Therefore, it is difficult to draw conclusions about access from the data.

The TEC data does show four areas where there was no funded provision in 2024, or where there has been no funded provision over the years – Carterton, Hurunui, Mackenzie District and Otorohonga. Responses to the survey from the ACE Environmental Scan 2025 show current ACE provision in these areas.

⁶ The latest year for which data has been provided by the TEC.

2.6 ACE learners

ACE learners come to ACE from diverse backgrounds and circumstances. Roughly half of the ACE providers who have completed each of the three environmental scan surveys identify that their learners come to ACE with no or low previous qualifications, are retired or semi-retired, or are in different types of employment arrangements.

One large nationwide provider spoken with for this scan said at least 50% of its 5,000 to 6,000 learners enrol with no or low qualifications, having exited the formal education system “*with nothing*”.

Table 2: Typical circumstances of ACE learners by survey respondents

Typical learner circumstances	% indicating these circumstances
Low or no qualifications	56%
Retired or semi-retired	47%
Upskilling	44%
Long-time out of education or employment	44%
New to New Zealand	44%
Full-time employed	42%
Learning difficulty or disability	40%
Negative prior learning experience	39%

Source: ACE Environmental Scan 2025

Table 2 shows the typical circumstances of ACE learners most indicated by the providers who responded to the 2025 survey.

Other circumstances included 26% who identified learners being new to the area, 22% saying their learners had recently had a job loss, 21% whose learners were seeking a career change, 17% who said learners were new parents, and 14% who said it was typical for their learners to be in the Corrections system.

Thus, ACE is catering to significantly diverse learning needs and to learners who engage in ACE for many different reasons.

2.7 ACE Aotearoa

ACE Aotearoa is the lead organisation for the ACE sector and is an ACE membership organisation. Since 2022, it has received government funding of \$1.2 million a year from the TEC to support its work. When initially providing this funding, the then government recognised the important role and work of ACE Aotearoa and set expectations for the funding:

“The funding will also support the ongoing operation of ACE Aotearoa who play an important leadership and coordination role across the sector and will help ensure the effective implementation of this initiative throughout New Zealand.”

“I expect this funding to be used for sector capability building activities, including strategic leadership of the ACE sector...” (Hipkins, 2020).

TEC funding is allocated to ACE Aotearoa to enable it to perform strategic sector leadership, capability building and coordination. As part of this, ACE Aotearoa has developed and facilitates core activities and initiatives targeted to sector capability building and growth, and to support quality teaching and learning.

ACE Aotearoa has an ACE Sector Steering Group that provides sector leadership through advice to government and discussion of issues that the members identify as important within ACE. The Group meets four times a year, including with the TEC and Ministry of Education, to update them on what is happening in the sector, to outline the impacts of new policies and requirements on learners and providers, and to consider how the ACE sector's interests can be best served (ACE Aotearoa, 2024).

ACE Aotearoa provides a professional development programme focused on enhancing teaching practice in the ACE sector and equipping educators with tools, strategies and knowledge to better support adult learners' needs. Examples include workshops such as Successfully Teaching Adults, ACE Teaching Standards, and Supporting Neurodiverse Learners. It also provides professional development grants to the sector to support the professional learning needs of ACE educators and providers (ACE Aotearoa, 2024).

ACE Aotearoa has developed ACE Teaching Standards to support those involved in teaching and learning across the ACE sector. The standards set out what good tutoring looks like in practice and what ACE learners have a right to experience when they learn with ACE providers. ACE Aotearoa has also developed an ACE Quality Assurance Framework for providers of community learning which describes a capable learning organisation. Organisations may apply for an ACE Quality Assurance quality mark as formal recognition of meeting the criteria for a quality approved learning organisation (ACE Aotearoa, n.d.⁷).

Each year, ACE Aotearoa delivers an annual conference and Hui Fono based on topics of high relevance to the sector. For example, the Hui Fono 2024 theme was He Waka Eke Noa: Together Towards Tomorrow, aimed at capturing a vision of unity, community and social cohesion at a time of concerns about displacement as a result of COVID-19 and devastating weather events in many parts of Aotearoa (ACE Aotearoa, 2024). In 2025, the theme was AI | AI – Bridging Artificial and Ancestral Intelligence.

ACE Aotearoa supports a well-established annual Adult Learners' Week He Tangata Mātauranga which celebrates and promotes the value of lifelong learning. This is an initiative of the United Nations Educational, Scientific and Cultural Organization (UNESCO) and is celebrated in more than 40 countries. It honours the achievements of adult learners who have returned to learning and the dedication of the educators who walk alongside them. It also showcases the learning opportunities available across communities and raises the profile and benefits of community education and lifelong learning.⁸ Learners are encouraged to talk about their learning journeys and how their learning has enhanced their lives.

ACE Aotearoa holds the following international memberships:

- Asia South Pacific Association for Basic and Adult Education (ASPBAE)
- International Council for Adult Education (ICAE)
- Adult Learning Australia (ALA).

New Zealand holds the presidency of ASPBAE with Peter-Clinton Isaac Foese elected to this role for the period 2025–2028 (ACE Aotearoa, 2025). Prior to this appointment, Foese had been on the ASPBAE Executive Council as the representative for the South Pacific region.

⁷ 'n.d.' refers to 'no date'.

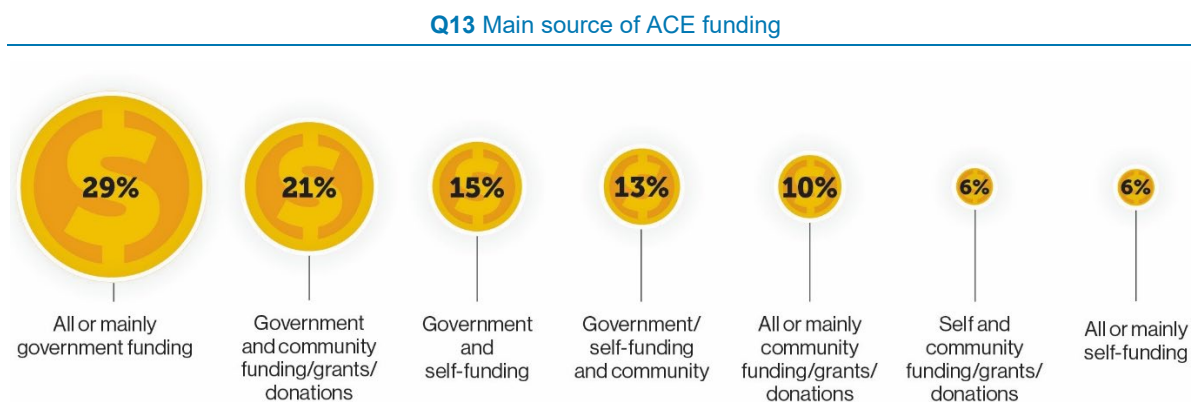
⁸ <https://www.aceaotearoa.org.nz/events/adult-learners-week-he-tangata-mātauranga>

3. Scope, scale and breadth of ACE provision

3.1 Funding of ACE provision

Figure 2 shows the main types of income for ACE delivery received by the ACE providers who took part in the ACE Environmental Scan 2025 survey.

Figure 2: Main source of ACE income accessed by 2025 survey respondents



Source: ACE Environmental Scan 2025

As with the 2019 and 2021 environmental scans, ACE income in 2025 is accessed from a mix of sources, with all or mainly government funding the main source for 26 to 32% of respondents across the three surveys.

Similar to the previous surveys, about 80% of 2025 survey respondents received some form of government funding to deliver ACE.

In 2025, 22% of respondents received no government funding:

- 10% accessed mainly community funding, grants, donations
- 6% were mainly self-funded
- 6% were self-funded and received community funding, grants, donations.

3.1.1 TEC ACE funding

In 2024, the TEC funded 77 providers to deliver ACE as identified in Table 1. Total funding for this provision was almost \$33.5 million.

Table 3 shows total amounts of TEC ACE funding each year for 2018–2024 and by the different provider types that were funded.

Table 3: ACE funding allocations by provider type and reporting year (2018–2024)⁹

Provider type	Allocation by reporting year						
	2018	2019	2020	2021	2022	2023	2024
CEP ¹⁰	\$2,062,623.00	\$3,230,917.00	\$4,183,038.09	\$5,175,855.37	\$5,291,604.05	\$5,462,022.83	\$5,594,970.96
GTE	-	\$2,644,000.00	\$2,691,591.99	\$2,734,656.50	\$2,767,472.38	\$2,843,577.90	\$2,985,756.79
PTE	\$7,716,090.00	\$7,462,847.00	\$8,011,866.25	\$9,126,191.35	\$9,089,605.96	\$10,143,974.57	\$10,524,860.45
REAP	\$2,467,830.00	\$2,514,825.00	\$2,822,692.85	\$2,929,575.94	\$2,964,730.85	\$3,584,415.30	\$3,677,489.28
School	\$3,082,802.00	\$2,859,517.00	\$2,742,388.20	\$3,654,012.38	\$4,498,468.15	\$4,348,438.00	\$4,055,806.08
Te Pūkenga	\$5,939,777.00	\$4,763,195.00	\$5,000,616.54	\$4,975,444.43	\$4,387,136.52	\$4,505,142.77	\$4,494,119.91
Wānanga	\$1,983,878.00	\$1,983,878.00	\$2,018,352.64	\$1,809,600.69	\$1,531,315.90	\$1,914,946.09	\$2,010,693.39
Total ACE Allocation	\$23,253,000.00	\$25,459,170.00	\$27,470,546.56	\$30,405,336.66	\$30,530,333.81	\$32,802,517.46	\$33,343,696.86

Source: Tertiary Education Commission data

As Table 3 shows, there has been an overall incremental increase of funding since 2018, equating to an extra \$10 million by 2024. Across the last seven years, this equates to an average increase of at least \$2 million a year. However, for 2022 and 2024, actual year-to-year funding increases were much lower – about \$125,000 for 2022 and about \$540,000 for 2024. Funding levels have not returned to the levels of about \$44 million in 2008-09, before significant government funding cuts at that time.

Community education providers (CEPs) and PTEs have had the largest increase in funding over the last seven years.

An increase in funding was allocated to ACE as part of the government's 2020 Wellbeing Budget. An extra \$16 million was allocated over four years to the sector. This was targeted to help providers meet the increased needs for training and upskilling, including rebuilding night classes. It was intended to give about 11,000 learners more opportunities to learn and “*expand courses to better support people displaced from work and facing barriers to entering the labour market, and people experiencing social isolation*” (Hipkins, 2020).

While the \$16 million increase in funding after 2020 is not shown in the funding figures reported in Table 3, TEC enrolment data (provided in Table 16 later in this report) shows that there was an increase in funded ACE learner enrolments by 15,850 between 2020 and 2021.

For PTEs, REAP and CEP providers, the TEC determines the appropriate total amount of ACE funding for each provider.

⁹ The data provided by the TEC identified this as the final approved allocation for the respective year. The dollar figure does not take into account any recoveries or amendments, therefore the value may not be reflective of a provider's value of delivery.

¹⁰ Community Education Provider.

Schools funding, through a community education collective agreement with the Ministry of Education, is based on a fixed hourly rate for a minimum number of hours of ACE provision per learner per year. This hourly rate changed little year-to-year until 2022, when it increased from around \$7 to \$10 an hour, and rose again to \$11.39 in 2026. Wānanga and Te Pūkenga subsidiaries also have a prescribed fixed funding rate per Equivalent Full-time Student, that has not changed a lot over time – from \$4,444 in 2018 to \$5,297 in 2026.

3.1.2 TEC funding priorities

TEC funding allocations are based on government funding priorities each year. Since 2021, TEC ACE funding for schools has prioritised learners with the highest need and those who have been traditionally under-served, such as Māori, Pacific peoples and disabled learners.

The ACE (Communities) fund for Wānanga and Te Pūkenga subsidiaries has prioritised the learning of foundation skills, re-engagement of learners whose previous learning was not successful, and progression into formal tertiary education.

3.1.3 TEC programme eligibility

The type of government-funded ACE programmes has changed over time, influenced by different governments and policies. For example, following the election of a new National government in 2008, amid a global financial crisis, there were large funding cuts to the sector. *“Government funding also narrowed down to a small range of specific programmes – literacy, numeracy, digital and te reo (Māori Language). Personal enrichment courses were considered an individual benefit rather than a public good, and the cost borne by the learner”* (McGregor, 2021, p. 81).

Under the Labour government, and the 2020 Wellbeing Budget that allocated increased funding for ACE, the type of programmes funded were extended to include taster courses and a focus on improving employability and improved health and wellbeing.¹¹ Courses supporting digital inclusion and Pacific languages were also expressly included and recognised as courses that promote social and cultural inclusion and participation.

From 2021, the TEC-funded priority programme areas have been to:

- **Promote social and cultural inclusion and participation, including courses such as:**
 - English language
 - NZ Sign Language
 - te reo Māori
 - Pacific languages (especially Realm languages)
 - Asian languages
 - digital inclusion
- **Raise foundation skills**
 - literacy, numeracy and digital literacy
- **Improve employability, including through:**
 - courses focused on life skills (for example, financial literacy)
 - Introductory taster courses

¹¹ See for example the TEC's Funding Conditions catalogues for 2020 and 2021 relating to the ACE funds and for subsequent years: <https://www.tec.govt.nz/funding/funding-conditions-and-mechanisms/funding-conditions/funding-conditions-by-year>.

- **Improve health and wellbeing including through courses in:**

- parenting, mental health and resilience, conflict resolution, anger management.

The ACE sector's contribution to these priorities is important, given its track record and its ability to contribute to national gaps and strategic goals relevant to these priorities. For example:

- A recent OECD (2024) report found 26% of adults in New Zealand have low literacy proficiency and 28% have low numeracy proficiency. Performance declines between 2014 and 2022-23 are particularly large in New Zealand compared with other countries.
- The Crown's Strategy for Māori Language Revitalisation 2019–2023 set goals for 2040, including at least one million New Zealanders having the ability and confidence to speak basic te reo Māori, and 150,000 Māori aged 15 and over speaking te reo Māori as much as English.
- Digital literacy, particularly for older and rural people, is vital. Many services are now provided online and there are fewer banks, postal services, government agencies and social services situated locally. Technological advancement and concerns of misinformation and disinformation also make this an essential learning area. The Office for Seniors' 2023 briefing to the incoming minister identified 25% of people aged 65+ were digitally excluded, and that *"digital engagement can play a significant role in improving social outcomes and individual wellbeing"* (p. 11).
- New Zealand is experiencing increasingly high unemployment, recorded at 5.4% in the December 2025 quarter, alongside a NEET (Not in Employment, Education or Training) rate of 13.2% for youth aged 15–24 in the same period (Stats NZ, 2026).
- More than 40% of people who do not achieve any school qualifications never engage in employment or any further education or training (Ministry of Education, n.d.-a).
- 56% of survey respondents of the ACE Environmental Scan 2025 identified their learners come to ACE with low or no qualifications.

Moreover, as reported later in this document regarding the impact and outcomes of ACE, wellbeing outcomes are identified as a significant result of ACE provision.

3.1.4 Tertiary Education Strategy

New Zealand's Tertiary Education Strategy 2020–2025 (superseded by the Tertiary Education Strategy 2025–2030) informed the priorities for tertiary education outlined above and strongly recognised the place of ACE in contributing to barrier-free, accessible education that is available to all learners (Objective 2). While there has been no dedicated ACE or lifelong learning strategy to guide the work and priorities of the sector, Priority Objective 2 of the Tertiary Education Strategy explicitly recognised the valuable role of ACE in supporting the development of foundation skills for adult learners. A specific action identified for government to further this objective was to *"invest in Adult and Community Education to provide more ākonga or learners with accessible education and pathways to further education, training and employment"* (Ministry of Education, n.d.-b, end page).

Other objectives of the Strategy strongly aligned with the contribution and outcomes of ACE. For example, Objective 1: Learners at the Centre, recognised that wellbeing is fundamentally entwined with learning. As discussed later in this report, wellbeing outcomes for learners as a result of ACE are identified as some of the main outcomes of ACE. Objective 4 recognises lifelong learning and reskilling opportunities as an important part of a future of learning and work.

A new Tertiary Education Strategy 2025–2030 was released in December 2025 by the Ministry of Education, informing funding priorities and decisions for the next five years. This is referred to later in this report as part of considering the focus of ACE looking ahead.

3.2 Breadth and nature of ACE provision

3.2.1 TEC funded programme priorities

Table 4 shows learner numbers by TEC primary priority funded provision across different ACE providers in 2024. This shows the breadth of courses delivered through TEC ACE funding and the number of learners engaged across courses aimed at growing people's personal, cultural, foundation and core skills, and health and wellbeing.

Data provided by the TEC does not report provision by Wānanga and Te Pūkenga in this way and therefore is not included in this summary. However, a scan of the different courses delivered by Wānanga and Te Pūkenga subsidiaries from the TEC data shows a diversity of delivery across introductory and specialised foundation courses supported through ACE funding. Examples of the breadth of this delivery include courses delivered by Te Pūkenga subsidiaries in:

- agriculture, environmental and horticulture-focused courses
- architecture and building (for example, carpentry and joinery)
- creative arts (for example, fashion design, performing arts, visual arts and crafts)
- cultural studies
- engineering and related technologies (for example, welding skills)
- food and hospitality (for example, cookery)
- health (courses such as massage therapy, nutrition and dietetics)
- management and commerce (such as digital basics, digital citizenship, keyboarding, introductory courses in Microsoft PowerPoint, Excel and Word)
- literacy and numeracy, employment and life skills.

ACE courses delivered by two Wānanga have included courses in the areas of creative and performing arts, te reo Māori, and tikanga and whakapapa training.

Table 4 provides data specific to schools, PTEs, REAP and CEP providers. It shows that in 2024, English language courses (including ESOL) had highest learner numbers – reaching 19,325 learners, primarily delivered by PTEs. Demand for English language provision has also increased consistently year-to-year (Table 5).

Table 4: 2024 learner numbers by TEC-funded provider type and primary priority provision

Provider type & provision	Te Reo Māori	English Language	NZ Sign Language	Employability Skills	Digital Inclusion	Health & Wellbeing	Other Language	Foundation Skills	Total Learners	TEC ACE \$ Allocation 2024
School	3,105	3,080	605	3,580	240	6,370	1,250	2,065	20,295	\$4,055,806
PTE	780	15,530	995	1,960	1,740	580	100	1,730	23,415	\$10,524,860
REAP	2,145	45	150	2,610	460	2,480	105	1,750	9,745	\$3,677,489
CEP ¹²	1,770	670	35	1,195	2,225	1,355	10	1,240	8,500	\$5,594,971
Total learners	7,800	19,325	1,785	9,345	4,665	10,785	1,465	6,785	61,955	

Source: Tertiary Education Commission data

¹² Community Education Provider.

Health and wellbeing courses had the next highest numbers, engaging 10,785 learners. About 60% of this delivery was by schools and nearly 25% by REAP. This is also an area of funded provision that has increased year-to-year (Table 5).

A total of 9,345 learner enrolments were for Employability Skills provision and 7,800 for te reo Māori, across the different provider categories.

3.2.2 Differing trends in priority provision enrolments alongside competing needs

Qualitative comments from two ACE school providers indicated a reduction in te reo Māori enrolments in recent times. A review of TEC data appears to support this, with ACE school enrolments in te reo Māori recorded at 3,105 in 2024, compared with 4,280 in 2023 and 5,780 in 2021.

Participants from other provider types had either not experienced reduced te reo Māori enrolments, or believed demand remained, but that other reasons could account for lower enrolments observed in recent years.

A te reo Māori organisation said people were placed on wait lists due to demand. Strong demand and continued wait lists were also the subject of a recent Listener article (Middleton, 2025). Further, a high percentage of ACE Environmental Scan 2025 survey respondents identified te reo Māori as a main area of course provision (see Table 7 below).

Another participant thought lower overall recent enrolments could reflect the significant surge in enrolments in te reo Māori courses seen several years ago at the time of the introduction of the Crown's Māori revitalisation strategy, and while still strong, have since tapered off.

Two other providers spoke of a recent increased demand for other areas of priority provision, which may be overshadowing enrolments in other areas, such as te reo Māori.

For example, one provider who delivers a range of courses has continued to have high demand for te reo Māori course delivery but has also observed increased demand in other areas such as for health and wellbeing courses. This aligns with increasing enrolments in TEC-funded health and wellbeing provision in Table 5.

A large provider described a significant shift in learner needs, with a greater need for intensive support in foundation learning, overtaking te reo Māori provision. This was not because people did not want to learn te reo, but because of the sheer need for foundation and life-skills courses. This included a notable increase in people struggling with getting by day-to-day, increased anxiety and mental health challenges, and gaps in resilience and coping skills, as well as basic knowledge – for example, learners who did not know their address, middle name or what a birth certificate was.

Partly, this shift in needs is seen as a hangover from gaps in learner engagement, motivation and support, and social connectedness experienced through COVID-19 because learners were no longer engaged and supported through in-person learning. One provider also described learners having increased feelings of failure and low confidence, and needing high levels of encouragement and support because their needs have not previously been sufficiently met, or they have not succeeded through learning experiences and courses provided by other education providers. Further, there has been a recent trend of closures and/or reduced youth and social services in many communities, which has meant that ACE foundation providers are now receiving referrals to support learners with more complex and challenging needs than before.

Table 5 shows potentially noteworthy changes in learner numbers by priority provision apparent from the TEC reported data.

Table 5 Changes observed in learner numbers by primary priority provision, 2021–2024

Changes in learner numbers by primary priority provision		2021	2022	2023	2024
Te reo Māori	Decrease in 2024	10,275	9,730	9,055	7,800
English language	Increased in 2023 and 2024	15,235	15,305	18,180	19,325
Foundation	Fluctuations and decrease in 2024	6,470	8,895	8,835	6,785
Health and Wellbeing	Increasing year-to-year	7,345	8,365	9,075	10,785
Digital inclusion	Decrease in 2024	4,625	4,895	5,355	4,605
NZ Sign Language	Fluctuations and decrease in 2024	2,170	1,940	2,360	1,785

Source: Tertiary Education Commission data

Table 6 also shows similar trends apparent from TEC data for expected hours of delivery across the primary priority areas when considering 2024 data compared to 2023 (decreases are shaded in red and increases in green).

Table 6: Differences in provider expected delivery hours, 2023–2024

Expected program hours	Te Reo Māori	English language	NZSL ¹³	Employability Skills	Digital Inclusion	Health & Wellbeing	Other Language	Foundation Skills
2024	194,030	570,095	28,094	158,171 ¹⁴	143,664 ¹⁵	164,286	22,006 ¹⁶	133,220
2023	205,567	514,831	38,127	154,424	162,989	152,051	20,675	186,540

Source: Tertiary Education Commission data

For foundation skills, it is not known what may underlie, or how significant, the apparent dip is in learner numbers and delivery hours from 2023–2024. However, given high need and the importance of such courses, along with the national issue of declining literacy and numeracy performance as reported by the OECD (2024), it seems worthy to note. Decreasing NZ Sign Language provision also seem notable.

3.2.3 Diversity and breadth of ACE provision across survey respondents

Table 7 shows the significant diversity and breadth of the main categories of ACE courses delivered by the organisations that completed the ACE Environmental Scan 2025 survey. Foundation and te reo Māori courses featured prominently.

As with the two previous environmental scan surveys, the following three main areas of course delivery featured prominently (each identified by 46% of respondents):

- digital literacy
- employment preparation, upskilling, professional development
- literacy and numeracy.

Furthermore, 40% or more of respondents indicated that their main course delivery focused on: life or core skills, health and wellbeing, quality of life, fitness and exercise, and te reo Māori and mātauranga Māori.

¹³ New Zealand Sign Language.

¹⁴ Learner numbers were higher for employability skills in 2024 (9,345) than 2023 (8,325).

¹⁵ Learner numbers were lower for digital inclusion in 2024 (4,605) than 2023 (5,355).

¹⁶ Learner numbers were slightly higher for 'other languages' in 2024 (1,465) than 2023 (1,390).

Table 7: Diverse main course provision by 2025 survey respondents

Main course category	% of survey respondents
Digital literacy	46%
Employment preparation, upskilling, professional development	46%
Literacy and numeracy	46%
Life skills / core skills (e.g. communication, self-management)	45%
Health and wellbeing, quality of life, fitness and exercise	41%
Te reo, tikanga, mātauranga Māori	40%
English language	34%
Art, craft photography	33%
Budgeting / financial literacy	29%
Home and gardening	27%
Languages and culture	26%
Sustainable living, community gardening	26%
Driver licensing	21%
AI (Artificial Intelligence) literacy	20%
Family and whānau safety, resilience, development	20%
New Zealand Sign Language	20%
Leadership training and skills	19%
Performing arts, dance, drama, music, song	18%
Te Tiriti education	18%
Parenting	16%
Food and wine	14%
Business management (running a business)	13%
Civic education	13%
First aid, health and safety	9%
Technical (e.g. furniture)	8%
Science, philosophy, literature, the arts	8%
Preparation for tertiary study	7%
Trades (e.g. construction, electrical engineering)	7%
NCEA	6%
Media and design	5%

Source: ACE Environmental Scan 2025

3.2.4 Main areas of enrichment through course provision

After being asked to identify their main areas of course delivery, survey respondents were then asked, at a higher level, to indicate what best categorised and summarised their main ACE provision (they were able to select more than one response category). The survey responses to this question are summarised in Table 8.

Table 8: Main ACE provision by enrichment identified by 2025 survey respondents

Main areas of enrichment by ACE provision	% of survey respondents
Foundation learning and skills (literacy and numeracy, digital literacy)	55%
Health and wellbeing	55%
Life skills	54%
Cultural enrichment (language, cultural learning)	51%
Personal enrichment (interests learning, personal knowledge and skills)	51%
Community development, building and enrichment	34%
English language teaching	31%
Professional enrichment and vocational education (workplace learning)	23%
Environmental and sustainability education	21%
Youth development and leadership	17%
Civic education	11%

Source: ACE Environmental Scan 2025

The categories of enrichment (survey response options) relate to the different learning and growth impacts of main course provision. All but two of these themes were response categories also used in the 2019 and 2021 surveys. These were developed initially by drawing on similar themes used in earlier Australian ACE environmental scans but adapted to be more reflective of ACE delivery in an Aotearoa context (adding for example 'cultural enrichment'). The 2025 survey used the same themes (slightly reworded) but also added the two themes 'environmental and sustainability education' and 'civic education' in response to previous survey responses and to more fully reflect different ACE delivery.

As with the two previous surveys, more than half of respondents identified that their main ACE provision contributed to:

- personal enrichment
- cultural enrichment
- foundation learning and skills
- health and wellbeing.

Life skills was also a category selected by 55% of the 2025 respondents – though this was selected to a lesser extent in 2021 (28% of respondents) and 2019 (41%). This could reflect TEC funding eligibility extending to programmes that have a life-skills focus in 2021, but this has also become an increasingly important area of ACE provision.

Community development as a main area of enrichment was less prominent in the 2025 survey, with 35% of respondents identifying this, compared to 49% in the 2021 survey and 62% in 2019. It is hard to know what the reasons may be behind this, but it seems important to note.

Nearly a quarter (23%) of the 2025 survey respondents identified vocational or professional enrichment as a main contribution of their delivery. This was lower than the previous two surveys (37% and 38% respectively). This might also reflect the TEC's expansion of priority provision and broader funding focus since 2021.

Overall, these findings show the predominant focus of ACE delivery in developing, growing and enriching learners in areas of personal and core knowledge and skills, cultural understanding and connection, and health and wellbeing.

3.2.5 Course hours

Fifty percent of the 2025 survey respondents indicated that on average, the duration of their courses were 20 hours or less a week:

- 25% said courses averaged less than 10 hours a week
- 25% said courses averaged between 11 and 20 hours a week.

About 30% said the average course hours varied a lot depending on the courses delivered. A small number (5%) indicated an average course duration of 80+ hours. These respondents have diverse delivery, including an art studio for people with disabilities, a school-based learning provider and an English language provider.

3.2.6 Course costs

As with the 2019 ACE Environmental Scan, most survey respondents identified that their ACE activities and courses were free for learners or were less than \$50. This was indicated by 71% of respondents.

A further 11% indicated that costs vary significantly depending on the course. Otherwise, 14% said that costs were between \$50 and \$100, and 5% delivered courses that cost learners more than \$100 but less than \$200.



4. ACE workforce: Capacity and capability

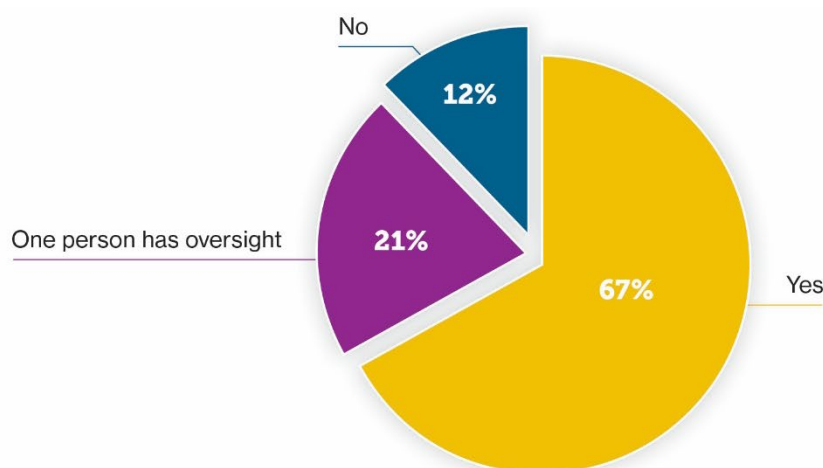
4.1 Organisation governance and management

The ACE Environmental Scan 2025 findings show that:

- 67% of respondent organisations have a governance and management structure in place overseeing their ACE delivery
- 21% have one person responsible for governance and management
- 12% (11 respondents) have no governance and management structure in place.

Figure 3: Governance and management structure of 2025 survey respondents

Q4 Do you have a governance and management structure overseeing your ACE delivery?



Source: ACE Environmental Scan 2025

The percentage of survey respondents without a governance and management structure, or with one person responsible, was higher than the 2019 and 2021 scans. This is shown in Table 9.

Table 9: Organisation governance and management identified by survey respondents

Organisation governance and management	2019 survey	2021 survey	2025 survey
Has a governance and management structure	90%	75%	67%
One person responsible	7%	15%	21%
No governance or management structure	3%	10%	12%

Source: 2019, 2021, 2025 ACE environmental scans

The 11 respondents to the 2025 survey who did not have a governance and management structure in place were asked why they did not have one.

Responses indicated that organisations were new and still establishing, had just one person responsible, or operated within an organisation whose governance and management structure sat at the overall organisation rather than being ACE specific. As the following quotes show, this includes individuals providing ACE services to give back, to share their expertise, and to encourage engagement in learning in their areas of passion:

“I’m a [...] consultant and coach and my courses are short and day workshops. I do this in my own business but offer the same value on a much lower cost to ACE to reach women who otherwise may never access such a service.” (Survey respondent)

“The services I provide are specialist to a specific kaupapa. This is my passion space where I get to give back to groups, roopu, whānau who need specific programme facilitation, tailored workshops.” (Survey respondent)

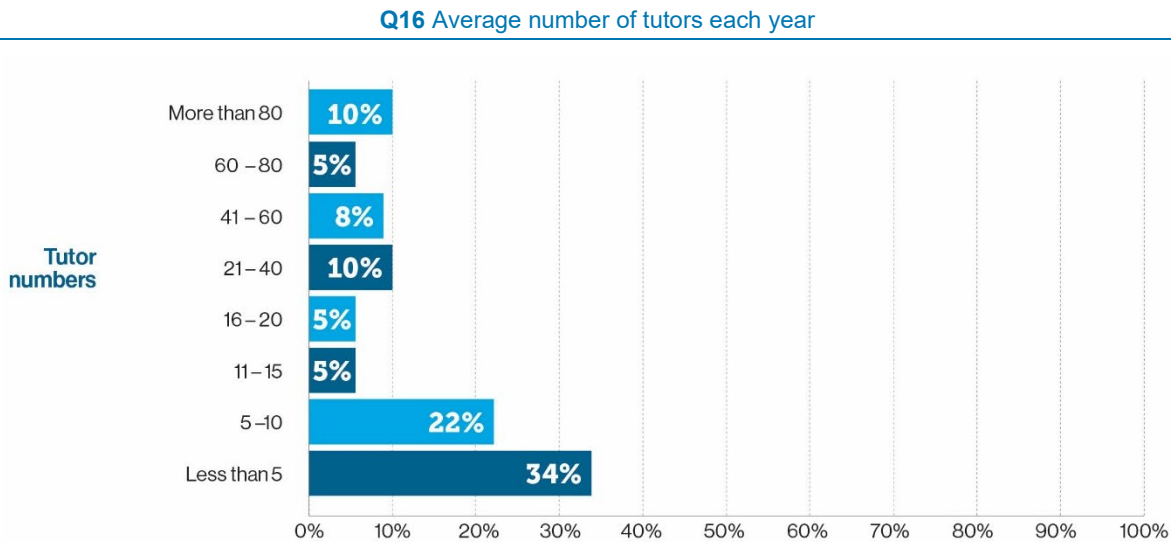
4.2 ACE tutors

There is little information in the literature about the ACE tutor workforce. The ACE Environmental Scan 2025 survey findings provide some insights, as reported below.

4.2.1 Tutor numbers

As with the 2019 scan, Figure 4 shows the number of tutors by organisation identified by 2025 survey respondents varies a lot.

Figure 4: Average number of tutors identified by 2025 ACE provider survey respondents



Source: ACE Environmental Scan 2025

For example, 34% of respondents said their organisations had fewer than five tutors, whereas 33% had 20 or more. Average numbers by organisation will depend on the size and scale of provision.

When comparing tutor numbers over time, Table 10 shows the average annual tutor numbers reported across the three environmental scans are not too dissimilar over the years.

Table 10: Average tutor numbers reported across three ACE environmental scan surveys

Average number of tutors	2019	2021	2025
Less than 5	26%	38%	34%
5–10	25%	18%	22%
11–15	8%	6%	5%
16–20	8%	11%	5%
20+	33%	28%	33%

Source: 2019, 2021, 2025 ACE environmental scans

For organisations responding to the 2019 survey with more than 20 tutors, 46% had an average of 2,000+ learners participating in ACE each year. This was similar to the 2025 survey, where 42% of providers who had more than 20 tutors had an average of 2,000+ learners participating in ACE each year.

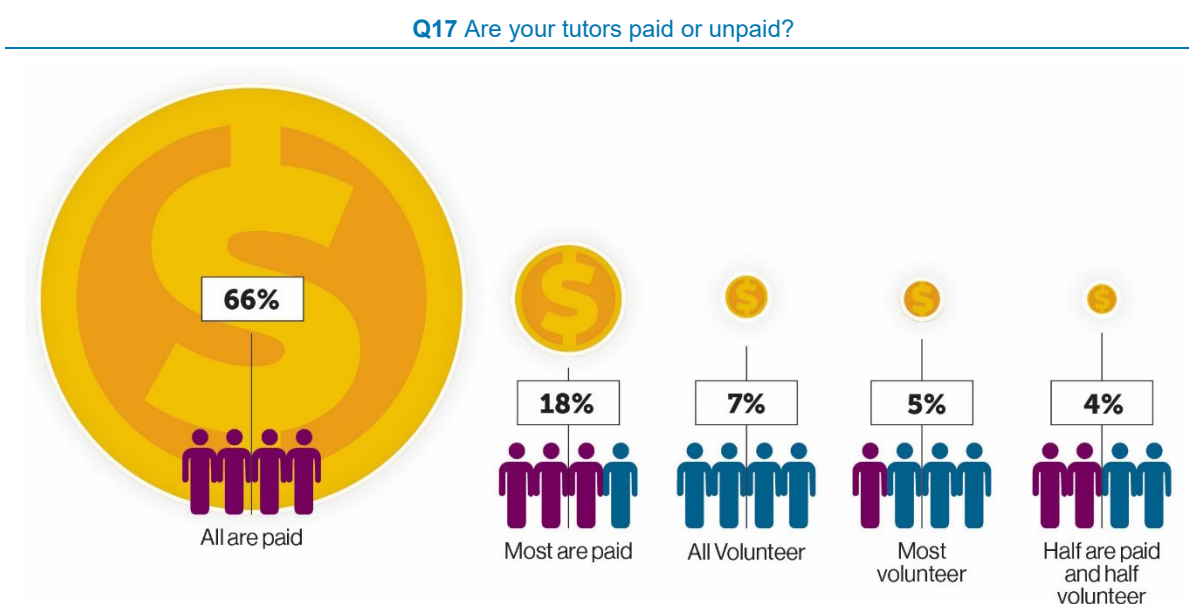
4.2.2 Employment arrangements

Participants spoken with for this scan commonly indicated that their tutors were part time and on fixed or short-term contracts. In the ACE in Schools context, the Ministry of Education and Post Primary Teachers' Association (2025) 'Community Education Collective Agreement 2025-2028' recognises the strong predominance of fixed-term employment under the agreement, which ACE in Schools tutors come under.

Paid tutors

Figure 5 shows 84% of 2025 survey respondents identified their tutors were all or mostly paid.

Figure 5: Percentage of paid and volunteer tutors: 2025 ACE provider survey respondents



Source: ACE Environmental Scan 2025

Qualitative comment from the scan highlighted that tutors are paid for their delivery time, but some organisations may not be able to pay tutors for their time in planning and preparation nor for professional development offered by the organisation. The sense was that this was not uncommon.

There also seems to be significant variance in the average hourly rate that tutors are paid. For example, one organisation indicated that the average hourly rate was \$25, whereas another paid their tutors \$46 an hour.

Schools-based ACE tutors who come under the aforementioned Community Education Collective Agreement receive between \$36 and \$48 an hour (depending on teaching qualifications, hours of teaching experience and tertiary tutoring experience).

Overall, the variance observed in the hourly pay rate range seems to align to general tutoring rates across the education sector. For example, the organisation '[Payscale](https://www.payscale.com/research/NZ/Job=Tutor/Salary)'¹⁷ identifies tutors in New Zealand are paid an hourly rate of between \$21.84 and \$48.03 – with the average hourly rate \$27.93.

According to one participant who joined a conversation for the scan, the ability to pay only to the lower end of the average hourly rate limits the pool of tutors they can attract.

Interestingly, another participant shared that although all tutors in its organisation are paid, there is purposefully no differentiation in pay by role seniority across their organisation. Further, despite all being paid, much work is also undertaken voluntarily beyond that which is paid.

Volunteer tutors

From the ACE Environmental Scan 2025, 12% of respondents indicated that most or all their tutors are volunteers, and 4% indicated they have a mix of paid and volunteer tutors.

Table 11 shows the percentage of paid and volunteer tutors identified in the surveys completed in 2019, 2021 and 2025.

Table 11: Paid and volunteer tutors identified across three ACE environmental scans

Paid and volunteer tutors	2019 survey	2021 survey	2025 survey
All are paid	63%	67%	66%
Most are paid	8%	14%	18%
Some paid / some volunteer (half and half)	18%	7%	4%
All volunteer	8%	6%	7%
Most volunteer	3%	7%	5%
Some volunteering contribution	29%	20%	16%

Source: 2019, 2021, 2025 ACE environmental scans

Across each of the three surveys, about 65% indicated that all their tutors were paid.

While the extent of volunteering differs somewhat across the surveys, each identify a reliance on volunteer tutors to varying degrees.

The three scans consistently show that in about 12% of organisations all or most of their tutors are volunteers.

In addition to volunteer tutoring roles, ACE Aotearoa annual reports show a high proportion of volunteers overall attached to ACE organisations, with volunteer numbers higher than tutors each year:

- **2023:** 1,200 tutors; 1,300 volunteers (ACE Aotearoa, 2023)
- **2024:** 1,338 tutors; 1,557 volunteers (ACE Aotearoa, 2024).

Presumably this includes all forms of volunteering, in addition to tutoring roles.

¹⁷ <https://www.payscale.com/research/NZ/Job=Tutor/Salary>

There is a dearth of information about the role and motivations of volunteers in the ACE sector in Aotearoa. One provider indicated all its courses had a paid tutor, but some also had volunteers in support roles. Another organisation with a small number of volunteers reflected that their volunteers do so for the love of the organisation and wish to give back. The 2022 Australian ACE Environmental Scan (Devlin & Wu, 2022) referred to the importance of volunteering for ACE providers as it aids low-cost service provision, and provides a stepping stone to other work opportunities.

Reciprocal partnering

Some ACE providers partner with other ACE organisations whose tutors come into their community spaces to engage their learners in new learning opportunities. Partnering may also take place due to a need to rely on external tutors with the capability to deliver to meet needs.

For example, in the context of libraries, the Whānau Learning team at Auckland Council Libraries has established strategic partnerships with literacy and learning providers such as Literacy Aotearoa. Through such partnerships, partner organisations can contribute their expertise in these areas of learning to reach learners in comfortable and familiar spaces, and where learning communities already exist.

For organisations such as Deaf Aotearoa, due to capacity and capability restraints, it has been necessary to use external tutors, alongside a small internal tutor pool, to be able to provide ACE learning to the Deaf community. However, Deaf Aotearoa's ideal and vision is to have a sufficient internal cohort of Deaf tutors – to build their capability in developing and delivering an array of ACE courses to Deaf people, and to create more pathways for Deaf educators and mentors.

This vision is identified as important to encourage and improve Deaf people participating in learning and to counter significant access barriers due to the rarity of an interpreter being proactively available in mainstream courses. It would also counter the high costs of using New Zealand Sign Language interpreters and the disconnect that can happen between tutors and learners when adding an interpreter to the learning environment. It recognises the overall greater connection and effectiveness achieved when learning and teaching is Deaf to Deaf. However, to date, this has not been possible due to the limited staff able to undertake this role, and the inability to fund and provide the level of professional development required to achieve this vision. Currently, there are no resources or targeted funding to realise this.

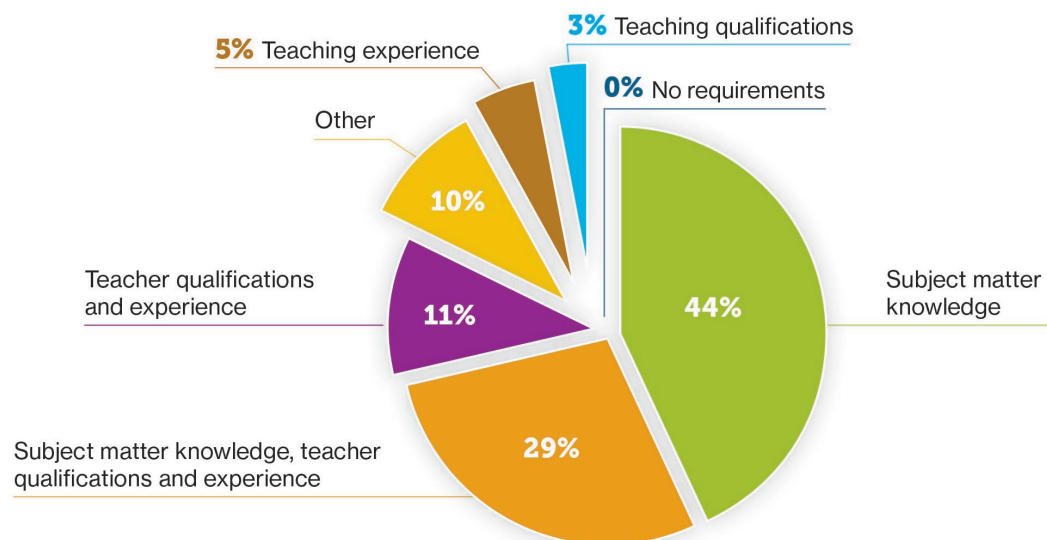
4.2.3 Tutor selection

As with the previous ACE environmental scan surveys, respondents have identified subject matter knowledge as a key requirement in their selection of tutors. In relation to this, the 2019 scan also reported providers who *“described the value to learners of tutors who are experts in particular skills areas and who bring to their teaching a lifetime of knowledge and passion to impart their knowledge”* (Chauvel, 2019, p. 34).

As Figure 6 shows, 44% of respondents indicated subject matter knowledge was a key requirement for tutor selection. A further 29% identified subject matter knowledge, together with teaching experience and teaching qualifications (or other adult education certificate) as key requirements.

Figure 6: Tutor selection requirements by survey respondents

Q18 Overall, what requirements inform your selection of tutors?



Source: ACE Environmental Scan 2025

Table 12 shows that subject matter knowledge has been identified as a core requirement for tutor selection over the last three surveys. This is potentially even more relevant in 2025, though different tutor selection requirements will also depend on the particular ACE courses providers deliver.

Table 12: Tutor selection requirements by survey respondents

Tutor selection requirements	2019	2021	2025
Subject matter knowledge (no teaching experience or qualifications required)	34%	32%	44%
Subject matter knowledge, teaching experience and qualifications	25%	25%	29%
Teaching qualifications and experience	22%	22%	11%
Teaching experience	9%	11%	4%
Teaching qualification	5%	4%	3%
No requirements	3%	5%	0

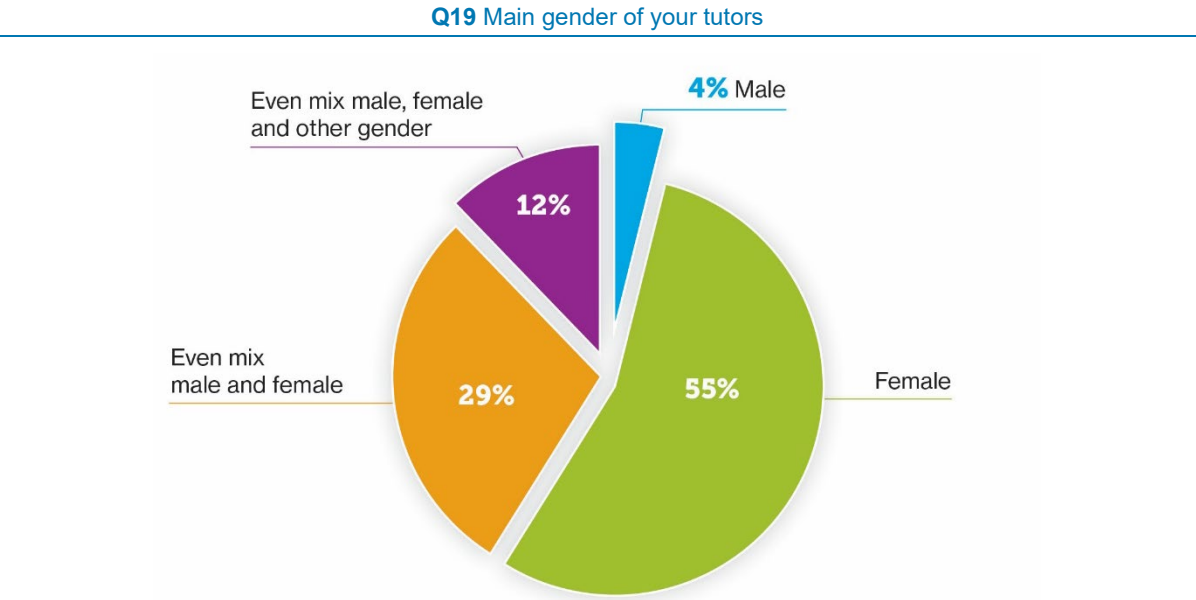
Source: 2019, 2021, 2025 ACE environmental scans

4.2.4 Main gender of tutors

Survey respondents were asked about the main gender of their tutors. This was not a question asked in previous surveys.

Figure 7 shows more than half (55%) indicated the main gender of their tutors was female, with 29% identifying an even mix of male and female, and 12% an even mix of male, female and other gender.

Figure 7: Main gender of tutors by survey respondents



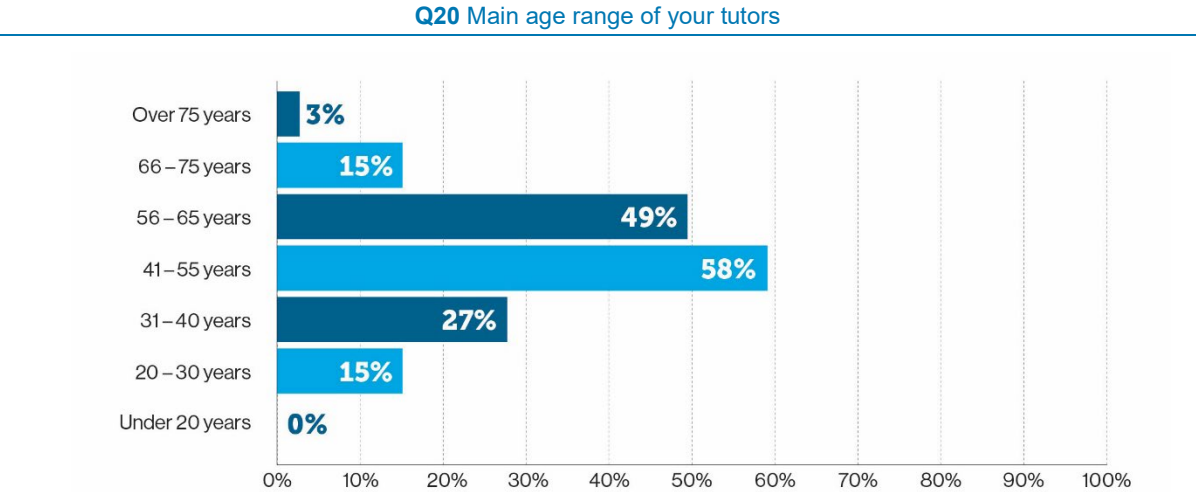
Source: ACE Environmental Scan 2025

Just 4% of respondents indicated the main gender of their tutors was male.

4.2.5 Main age of tutors

ACE organisations surveyed have a mature tutor workforce. Figure 8 shows about half or more identified the main age of their tutors is in the 41–65 age range.

Figure 8: Main age range of tutors by survey respondents



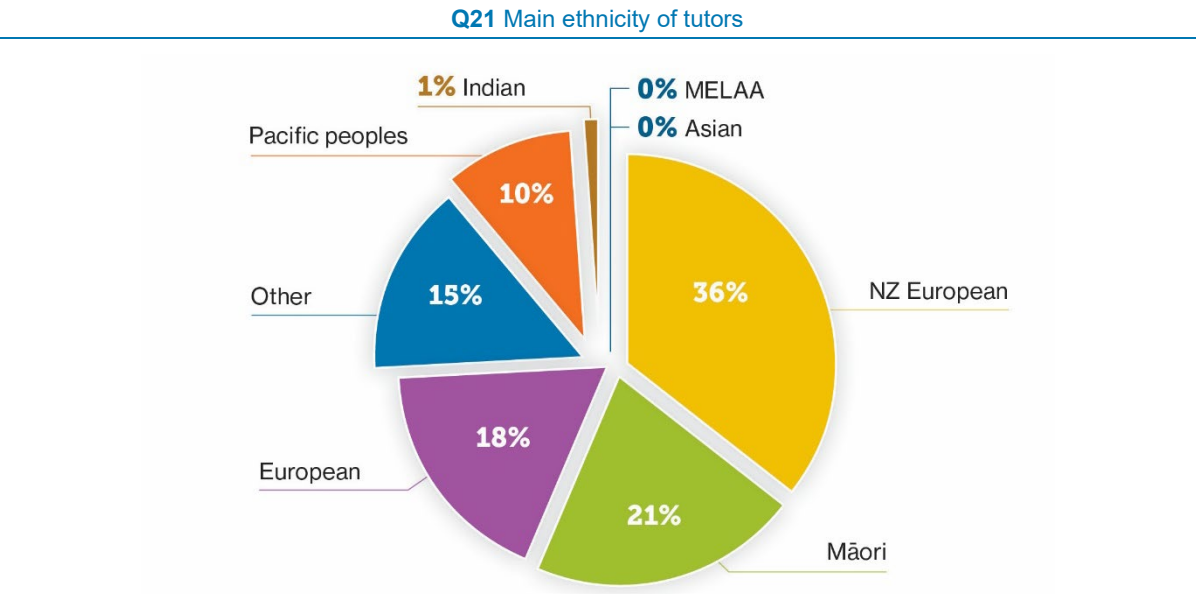
Source: ACE Environmental Scan 2025

Around a quarter (27%) indicated the main age range of their tutors was the 31–40 age group. None identified that their main tutor age group was less than 18 years, and 15% identified the 20–30 age group.

4.2.6 Main ethnicity of tutors

Figure 9 shows the main ethnicity of tutors reported by the organisations that responded to the 2025 Environmental Scan survey.

Figure 9: Main ethnicity of tutors by survey respondents



Source: ACE Environmental Scan 2025

Fifteen percent of respondents indicated ‘other’ to the question of main tutor ethnicity. Most said this was because their tutors were an even mix of different ethnicities.

Table 13 provides a comparison of the main learner ethnicities and main tutor ethnicities identified by 2025 survey respondents.

Table 13: Comparison of main tutor and learner ethnicities¹⁸ by survey respondents

Ethnicity	Tutors	Learners
NZ European	36%	40%
Māori	21%	18%
European	18%	3%
Pacific peoples	10%	10%
Asian	0%	7%
Indian	1%	1%
MELAA ¹⁹	1%	1%

Source: ACE Environmental Scan 2025

This shows broad alignment in representation, except for European and Asian ethnicities.

¹⁸ Source: ACE Environmental Scan 2025 survey.

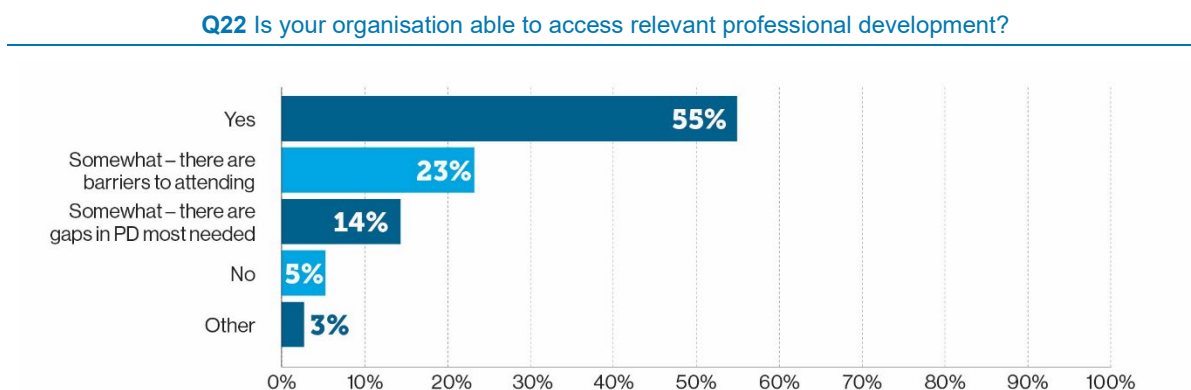
¹⁹ Middle Eastern, Latin American, African.

4.2.7 Tutor professional development

The 2025 survey asked organisations if they were able to access relevant professional development.

As Figure 10 shows, most can, at least to some extent, though there are challenges.

Figure 10: Access to professional development by survey respondents



Source: ACE Environmental Scan 2025

Survey respondents were asked to comment on any challenges they had accessing professional development. Cost and time to attend were the main issues identified by those who indicated barriers to access. This included a lack of funding for professional development, tutors wanting to be paid to attend but the organisation does not pay for professional development time, and tutors not having the time to attend due to other roles.

One respondent commented that there had been a “*decrease in voluntary commitment to tutor PD*”. Another, from a coordinator perspective stated:

“Apart from a few funded courses, all our courses have to be self-funded. As a part-time coordinator, there is very little time to upskill and participate in activities outside of our programme.” (Survey respondent)

Other barriers mentioned by one or more respondents were: limited opportunities due to geographical location, difficulties with access due to the need for interpreters, and difficulties knowing what professional development to best assign to tutors.

Respondents did not provide any comments to understand what specific gaps there may be with the types of professional development needed but not currently provided.

Comments from participants who took part in a conversation for the 2025 scan added to these insights.

For example, from a governance and management perspective, an expectation from tutors that they would be paid for professional development time made this very expensive for the organisation in the absence of funding for it – “*it makes it unaffordable*”. Also, another organisation commented that since its tutors were all contractors, they did not necessarily want or have the time for professional development.

One participant (non-funded) identified a need for professional development targeted at directors, not just tutors, to build knowledge about funding acquisition, effective management and marketing.

Similarly, a national executive of a non-funded nationwide organisation considered that local managers and coordinators at the grassroots level needed support with strategising, fundraising and effective delegation. This is particularly important in volunteer-led contexts, where people often take on everything themselves – an unsustainable approach that can detract from leadership and operational performance. Buy-in to access professional development could be a key challenge. This organisation stressed that external professional development support needed to be seen to align closely with the organisation's operations.

At the same time, another grassroots community organisation considered that ACE Aotearoa had provided instrumental professional development support at a governance and management level.

“We love that ACE Aotearoa is there for professional development, both online and face-to-face. They provide opportunities for tutors as well as governance and management.”

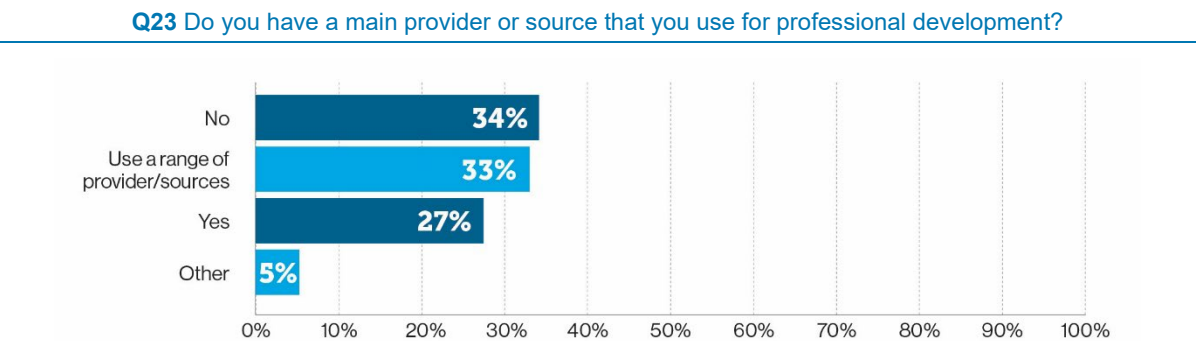
Through this professional development, the provider said their organisation was able to set itself up as a legal entity. It enabled them to apply for government funding, write policy and become a truly bicultural organisation that now worked in partnership with iwi. They also considered that ACE Aotearoa was strongly committed to co-design, having worked alongside and supported the organisation with course development.

This provider also commented on the high quality and relevance of workshops and training provided by ACE Aotearoa.

Professional development provision

The survey asked respondents if they had a main provider or source of professional development. Figure 11 shows mixed responses.

Figure 11: Main source of professional development by survey respondents



Source: ACE Environmental Scan 2025

Of the 27% of respondents (n=20) who did have a main provider of professional development, ACE Aotearoa was the most commonly named provider among those who chose to respond to this question. A few indicated that professional development was provided internally.

A provider who participated in a conversation for the scan discussed how its niche and specific provision required tailored professional development that was not available externally. Therefore, professional development had to be internally provided to its tutors.

This provider was committed to, and took pride in, paying its tutors for professional development time. It ensured that professional development was regularly provided over a number of days each year in recognition of the positive impact on teaching quality and consistency. However, the cost of sending all tutors to external professional development, such as conferences, was prohibitive. The participant considered that professional development might be more engaging if delivered by external rather than internal colleagues, and was aware that professional development tailored to their organisation's specific needs could be sought through the ACE Aotearoa professional development fund. However, this would not enable a programme of ongoing professional development. At a macro level, they considered that the funding model needed to better cater to diverse professional development needs, rather than requiring providers to seek this "*cap in hand*".

ACE Aotearoa receives professional development grant funding from the TEC to allocate to providers to enable specific and targeted upskilling of educators. This is the fund referenced in the previous paragraph. Table 14 shows the amount of grant funding requested and allocated annually for 2023–2025.

Table 14: ACE professional development grant funding: Demand and availability

ACE Aotearoa professional development grants				
Year	\$ applied for	\$ allocated	# applications	# awarded
2023	\$596,109	\$156,570	23	12
2024	\$485,230	\$129,770	25	12
2025	\$248,074	\$133,160	25	12

Source: ACE Aotearoa Annual Report 2023

The lower amounts of funding sought in 2024 and 2025 reflect a higher number of smaller grant applications and fewer larger innovation grants compared with 2023. The number of applications received has been similar across all three years, while the number awarded has been exactly the same. In all years, the total amount of funding applied for has far exceeded that available for allocation.

The ACE Aotearoa Annual Report 2023 shows that overall, ACE Aotearoa engaged 514 participants in professional workshops.

5. ACE learners

5.1 Learner numbers

The 2019 ACE Environmental Scan reported on the significant challenge or impossibility of accounting for the numbers of ACE learners in New Zealand. This situation continues as there is no register or self-reporting tool to nationally collect this information.

The TEC (and presumably the Ministry of Education) only collects data on funded providers. ACE Aotearoa is only able to reliably collect information from its members and through periodic research such as this.

Information collected is predominantly for funded provision. However, there is extensive non-government funded provision undertaken across the country in vastly different forms. For example, if considering just the learner numbers reported by the 16 non-funded providers who responded to the 2025 survey, their combined total average number of learners each year is between 2,465 and 4,340.²⁰ Thus, learner numbers identified from the TEC and ACE Aotearoa are highly conservative and are only a partial representation.

5.1.1 ACE Aotearoa reported numbers

ACE Aotearoa annually surveys its members and asks about numbers of learners and programmes. This information is reported each year in its annual report. Table 15 summarises this information year-to-year since 2019. The right hand column also shows the number of ACE Aotearoa members who provided this information each year.

Table 15: ACE Aotearoa annual learner numbers

Year	Number of ACE learners	Number of ACE programmes	By # ACE Aotearoa member respondents
2019	67,459	9,970	27
2020	46,997	4,291	32
2021	62,220	12,127	25
2022	111,300	10,260	48
2023	81,876	7,036	39
2024	80,630	6,868	38

Source: ACE Aotearoa annual reports

²⁰ These numbers reflect that the relevant survey question response options gave respondents a selection of a range of learner numbers to select from, for example, 151–250.

As shown, reported numbers of more than 80,000 in 2023 and 2024 are based on enrolments from only about 40 organisations. Yet the number of funded and non-funded ACE organisations is likely to be in the hundreds, including individual ACE providers who engage thousands of learners each year.

5.1.2 TEC reported numbers

According to data provided by the TEC, shown in Table 16, 89,490 learners were enrolled in ACE in 2024. These enrolments are with just 77 providers. With the exception of university enrolments (n=290), this figure represents TEC-funded ACE only.

Table 16: TEC-funded ACE learner enrolments by provider type 2018–2024

Provider type	Learner enrolments ²¹						
	2018	2019	2020	2021	2022	2023	2024
CEP ²²	4,900	5,840	6,625	6,935	7,290	8,065	8,625
GTE	-	4,550	4,475	5,265	5,640	7,065	6,820
Te Pūkenga	26,640	22,360	16,890	18,910	16,520	14,640	15,040
PTE	25,725	20,225	17,240	21,350	23,835	25,300	23,695
REAP	8,795	8,580	6,965	7,635	9,280	10,065	10,980
School	19,880	19,510	15,820	23,595	21,355	21,235	20,485
Wānanga	3,070	2,440	815	1,020	2,805	3,740	3,550
University	205	330	395	360	225	155	290
Total	89,215	83,835	69,220	85,070	86,955	90,255	89,490

Source: Tertiary Education Commission data

Table 16 shows total enrolments in 2024 were about the same in 2018 and 2023, but there was decline and divergence in the years between. The decline in enrolments was most notable in 2020, with the commencement of COVID-19 lockdowns in Aotearoa. Numbers then lifted sharply in 2021 and have increased since then. This was supported by the government's \$16 million funding boost in 2020, allocated over four years to 2024. Now that enrolment numbers have been restored, their trajectory post-2024 will depend on subsequent government funding.

Despite a return to similar 2018 enrolment numbers in 2023 and 2024, Table 16 also shows that funded ACE enrolments by provider type have shifted dramatically for some providers over this period. For example, enrolments with CEPs have increased, whereas enrolments with Te Pūkenga subsidiaries have reduced significantly since COVID, during a time of vocational reform and significant changes to that sub-sector. Wānanga ACE learner numbers declined from 2019 but are higher in 2023 and 2024 than they were pre-COVID-19.

5.1.3 Ministry of Education reported numbers

ACE learner numbers reported by the Ministry of Education through the Education Counts website, shown in Table 17, are significantly different than that of data by the TEC, showing only 17,250 enrolled in ACE in 2024. Differences in TEC and Education Counts reported data were noted in the 2019 ACE Environmental Scan report.

²¹ The TEC has rounded learner enrolment numbers to the nearest 5. Due to rounding, the underlying values may not add up exactly to total values. Values between one and four were withheld for privacy.

²² Community Education Provider

Table 17: Education Counts ACE learner enrolment data by provider type, 2017–2024

	2017	2018	2019	2020	2021	2022	2023	2024
University	2,935	2,830	2,765	1,810	1,010	925	870	445
Te Pūkenga	27,770	26,580	26,810	20,835	20,735	18,810	13,310	5,790
Wānanga	2,970	2,665	1,985	720	930	1,975	2,535	2,370
PTE	4,140	3,325	730	810	970	555	695	375
Total²³	37,545	35,230	32,100	24,145	23,575	22,130	17,300	17,250

Source: Education Counts²⁴

The differences are explained, to an extent, by the fact that Education Counts' data covers only ACE enrolments with Te Pūkenga subsidiaries, universities, Wānanga and PTEs. TEC data includes learners enrolled with these providers, but also CEPs, GTEs, schools and REAP. However, Education Counts' learner enrolment data for these four provider types is notably different from the TEC data for the same provider types. This merits exploration given it is the Education Counts' data, not TEC data, that is the only source of ACE enrolment data published and publicly provided.

For the purposes of this report, reliance has been given to TEC data, which covers all funded ACE provision. As the funder of ACE, TEC collects data based on direct reporting from providers. The TEC also provided the data specifically to inform this scan with an understanding of its focus and that of the 2019 ACE Environmental Scan.

5.1.4 Environmental scan reported numbers

The ACE Environmental Scan 2025 shows annual ACE learner enrolments with individual providers ranges significantly. For example, as shown in Table 18, 52% of respondents indicated that their ACE enrolments are typically 250 or fewer learners annually, 4% (three respondents) typically have more than 10,000 learners enrolling in their ACE courses each year, and 10% (seven respondents) have more than 4,000 enrolling each year.

Table 18: Average annual learner enrolments identified by survey respondents

Annual average number of learners	Percentage of survey respondents
250 or less	52%
251 – 1,200	22%
1,201 – 4,000	15%
4,001 – 7,000	6%
7,001 – 10,000	0%
10,000+	4%

Source: ACE Environmental Scan 2025

Qualitative comment provided for the environmental scan showed some variation in the extent to which organisations have experienced recovered learner numbers since COVID-19, but overall feedback reflected high demand for ACE today. For example, one large school provider with annual enrolments of about 8,000, spoke of having to “*put the brakes on*” due to huge demand overtaking physical classroom and amenity space.

²³ The sum of learner numbers by the various subsectors do not add to the total learner numbers each year. The Education Counts excel data table notes that students are counted in each subsector they enrol in, and once in total. This means the sum of the various subsectors may not add to the total.

²⁴ <https://www.educationcounts.govt.nz/statistics/tertiary-participation>

5.2 Gender

TEC data reported in Table 19 shows female enrolments have been higher than male enrolments every year since 2018. Across 2021–2024, the average female-to-male ratio has been 70:30.

Table 19: Number of TEC-funded learners by gender, 2018–2024

TEC enrolment data	2018	2019	2020	2021	2022	2023	2024
Male	30,605	27,205	21,465	23,575	22,820	24,530	25,075
Female	55,780	52,630	43,780	56,805	57,260	58,155	57,120
Another gender/ gender diverse ²⁵	-	5	20	-	10	20	45
Total number of enrolments	86,385	79,840	65,265	80,380	80,090	82,705	82,240
% of female enrolments	65%	66%	67%	71%	71%	70%	69%

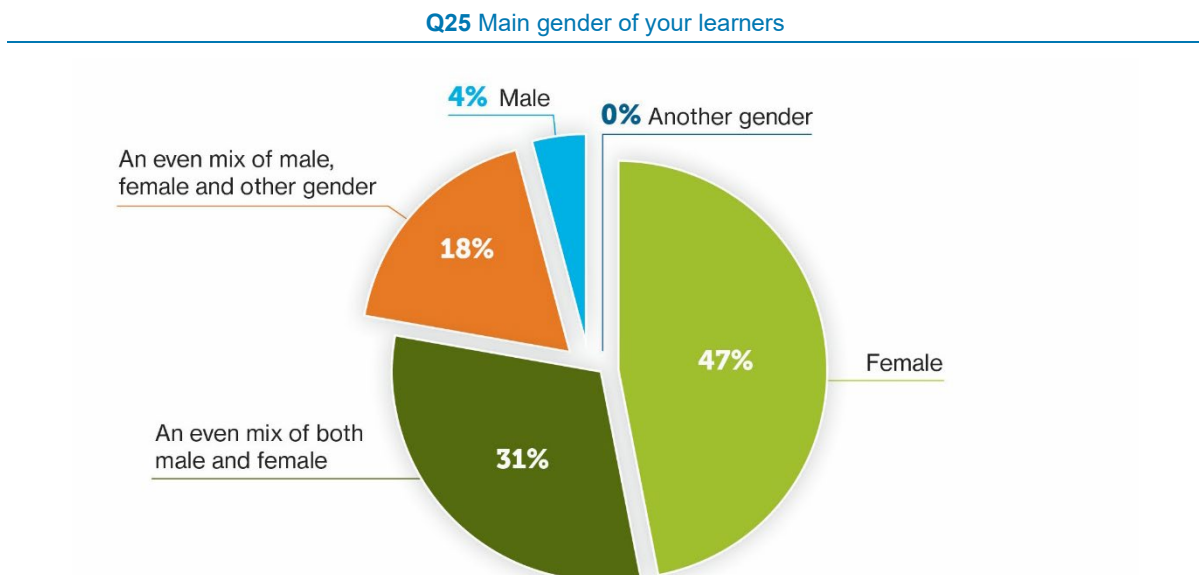
Source: Tertiary Education Commission data

There is a similar trend when considering TEC data for enrolments by different provider types, though for Community Education Providers, REAP, PTEs and schools combined, there is a slightly higher average female to male ratio of 73:27.

The exception is for Search and Rescue and Emergency Management ACE provision. In these courses, male enrolments were higher than female enrolments each year from 2018 until 2021, but there was an increase in female enrolments in 2021, which balanced the male and female gender ratio of enrolments in 2022, and that has continued. Notably, this shift followed the COVID-19 pandemic lockdowns.

As shown in Figure 12, the 2025 survey findings, like the TEC data, shows a trend of mainly higher female than male learner enrolments.

Figure 12: Main gender of learners identified by survey respondents



Source: ACE Environmental Scan 2025

²⁵ The TEC notes that in April 2021, Stats NZ updated their sex and gender statistical standards, whereby the “Gender diverse” response category was changed to “Another gender”. These response options are not a reporting option for ACE in Schools, Community Education Providers, PTEs and REAP (nor for Search and Rescue and Emergency Management in 2018).

When comparing the main gender of learners identified by respondents over the last three surveys (Table 20), the 2025 survey had a greater percentage of respondents indicating mainly female learners with fewer indicating an even mix of male and female.

Across all years, only a small percentage have identified a main male demographic.

Table 20: Main gender of learners identified across three ACE environmental scan surveys

Main gender	2019 survey	2021 survey	2025 survey
Both male and female	79%	71%	31%
Female	19%	24%	47%
Male	1%	4%	4%

Source: 2019, 2021, 2025 ACE environmental scans

A master’s thesis completed in New Zealand by Jennifer Leahy (2016) looked at what prompted women to engage in ACE and the subsequent impact on their lives:

“Key themes highlighted women’s involvement in ACE was an opportunity for women to meet new people, manage the impact of social isolation and to experience and/or enjoy the mutual support of other women. ACE was also undertaken for practical reasons such as financial accessibility and fewer barriers to participation. Other themes identified were around opportunities available for women to develop their confidence and enhance their personal development. For some women, this subsequently had positive impacts on their families” (p. 2).

5.2.1 Participation by gender influenced by type of provider and provision

Participation by gender varies significantly depending on the organisation in which ACE learners enrol, as is naturally the case where organisations are specifically for men, such as Men’s Sheds, or for women, such as women’s centres. Course type also influences gendered participation. For example, a review of the 2024 TEC data shows a high proportion of female enrolments compared to males in New Zealand Sign Language (88%) and te reo Māori (79%) courses, and a lesser uneven gender mix in programmes such as ‘other language’ (63% female) and ‘Employability Skills’ (65% female).

One English language provider indicated a female-to-male participation rate of about a 60:40, reflecting that many of their learners were former refugees and newcomers to New Zealand who may enrol as family groups, meaning both men and women shared a common purpose for participating and learning.

Information and literature from overseas about Men’s Sheds highlights their broad reach, the factors that encourage men to join, and the significant benefits of participation. The 2022 Australian ACE Environmental Scan (Devlin & Wu, 2022) refers to Men’s Sheds as having boosted male participation in ACE in that country. Recent New Zealand research about Men’s Sheds (Pio, 2025) discusses similar aspects of participation and positive outcomes for participants.

5.2.2 International variance

There appears to be little current information about gendered participation in ACE in the literature. From what is available, it seems that Australia may have a less gendered difference than New Zealand. The 2022 Australian ACE Environmental Scan (Devlin & Wu, 2022) references 2020–21 data reported by the Australian Bureau of Statistics (2022), showing that 1.2 million Australians aged 15–74 years (6%) had participated in ‘personal interest learning’ in the past 12 months, with slightly higher female participation (7%) than male (5%).

The Australian Bureau of Statistics also reported 4.4 million (23%) participated in ‘work related training’ – that is, training completed for work but not forming part of a qualification. Among the 4.4 million Australians who participated, rates were similar for females (24%) and males (23%).

The Adult Learning Australia website states that “*Western Australia has the greatest gender gap when it comes to adult learning, with 36.5% of women compared to 45.8% of men involved in formal and non-formal learning.*”²⁶

A recent report by Workers’ Educational Associations (WEA) in the United Kingdom highlights a significant difference in male and female enrolments. In 2023/2024, of 18,706 learners, 75% were female.

5.3 Age

Tables 21 and 22 show that, according to TEC data, learners aged 60 and over have consistently recorded the highest enrolment numbers in ACE Community and Schools²⁷ and ACE in Tertiary Education Institutes (TEIs)²⁸ since 2018, except for 2024. Strong participation by learners aged 40 years and over, and particularly those aged 60 and over, was also reported in the 2019 Environmental Scan.

Table 21: Learners enrolled by age group, TEC ACE Community and Schools, 2018–2024

ACE Community and Schools: Total # learners enrolled by age group, 2018-2024										
Year	16–19	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60 & over
2018	3,305	3,060	3,670	3,785	3,670	3,855	3,475	3,490	3,045	8,730
2019	3,460	3,120	3,375	3,810	3,395	3,605	3,475	3,480	3,100	9,980
2020	2,855	2,350	2,790	3,120	3,265	3,075	3,040	2,740	2,535	7,980
2021	2,990	2,745	3,050	3,840	3,695	3,730	3,735	3,590	4,390	10,425
2022	3,275	2,505	3,050	4,210	3,690	3,765	3,375	3,310	2,765	12,200
2023	3,680	2,885	3,085	4,045	3,885	3,925	3,375	3,490	2,975	12,975
2024	6,480		14,725			22,650				9,895

Source: Tertiary Education Commission data

TEC advised it had changed its reporting of learner age groups to align with Stats NZ data reporting for data collected in 2024. Therefore, for the reporting of enrolments in 2024, TEC has grouped some of the age-range bands together into broader age bands, resulting in fewer age bands reported overall. This can be seen for the 2024 enrolments by age for ACE Community and Schools in Table 21. Because learner enrolments by age are reported across a broader age span in 2024, the number in the ‘60 and over’ age group appears much lower when compared with other age groupings. Irrespective, two trends can be seen. First, enrolments in the ‘60 and over’ age group increased most notably post-2020. Secondly, enrolments in the ‘60 and over’ age range decreased markedly in 2024.

The TEC has provided 2024 age-specific data for ACE in TEIs in the same way as previous years, as shown in Table 22.

²⁶ <https://ala.asn.au/?s=gender+gap>

²⁷ This refers to ACE delivered by CEPs, schools, REAPs, and PTEs.

²⁸ This refers to ACE delivered by Te Pūkenga subsidiaries, Wānanga, and universities and includes enrolments for one PTE where age-related data is reported for 50 learners in 2023.

Table 22: Learners by age group, TEC ACE in TEI enrolments, 2018-2024

ACE in TEIs: Total # of learners enrolled by age group, 2018–2024										
Year	16–19	20–24	25–29	30–34	35–39	40–44	45–49	50–54	55–59	60 & over
2018	1,040	2,505	2,400	2,415	2,180	2,140	2,395	2,400	2,535	3,955
2019	1,035	1,990	2,485	1,990	1,915	1,795	1,925	2,135	2,010	3,585
2020	940	1,620	1,515	1,495	1,295	1,180	1,350	1,310	1,175	2,420
2021	1,080	1,385	1,695	1,535	1,435	1,280	1,340	1,290	1,310	3,215
2022	1,180	1,625	1,715	1,610	1,500	1,235	1,190	1,120	995	2,615
2023	865	1,255	1,575	1,655	1,300	1,205	1,235	1,070	1,010	2,680
2024	1,605	1,810	1,785	1,705	1,445	1,270	1,105	1,000	755	1,790

Source: Tertiary Education Commission data

For ACE in TEIs, Table 22 shows a decline in the enrolment among learners aged 60 years and over in 2024 compared to 2018–2023, and a more even spread of ACE enrolments across all age groups in 2024 compared with ACE Community and Schools. A comparison of the 2023 and 2024 enrolments in Table 22 shows an increase across the 16 to 44 age groups in 2024, notably for the 16–19 age group since 2018. Enrolments across the 45 years and over age groups declined. Despite this, learners 60 years and over continue to show strong participation in ACE.

As identified in the 2019 scan, and discussed later in this report, ACE provides significant lifelong learning opportunities and wellbeing-related benefits for older learners. Further, the unique nature of ACE as a welcoming space that is open to all ages encourages participation from older learners. The intergenerational participation and reciprocal learning of older and younger learners together is also a valued feature of ACE.

Of late, there has been commentary about older people remaining in the workforce longer in Aotearoa²⁹ because of cost of living pressures. Older workers also face challenges finding employment when they want or need to change roles. Alongside a wish for greater social connection, those factors may also be a key factor contributing to the rise in older people participating in ACE in the immediate post-COVID years. The reasons for the decrease in enrolments for those aged 60 years and over shown by the TEC data specifically for 2024 have not been identified.

In discussing these observed trends with providers during qualitative conversations, one large provider confirmed that it continued to have a large cohort of older learners and had not experienced a decline in that demographic.

Another provider had not experienced a decline in enrolments for learners aged 60 years and over in the last few years. However, they had purposefully grown their younger age group, focusing on evening and weekend courses.

As seen in Table 23, a high proportion of survey respondents indicated their main learner cohorts were in the 26–44 (67%) and 45–64 age groups (61%), compared with other age groupings. These were also the two main learner age groups indicated in previous environmental scan surveys – though unlike 2025, more than 50% of the earlier survey respondents indicated the main age range of their learners was 18–25 and 65–75.

²⁹ Te Ara Ahunga Ora New Zealand Retirement Commission reports that at 24%, New Zealand has one of the highest rates of people aged 65+ still working compared for example to Australia at 12% and the United Kingdom 10%. Among New Zealanders aged 65–69, 44% still have jobs. Many workers in their 50s and 60s struggle to find jobs when they want or need to change roles – <https://retirement.govt.nz/policy-and-research/retirement-income-policy-review/2019-review-of-retirement-income-policies/work-and-the-workforce>

Table 23: Main age range of learners identified across three ACE environmental scan surveys

Main age range of learners	2019 survey	2021 survey	2025 survey
Under 18 years	23%	18%	14%
18–25 years	51%	54%	25%
26–44 years	71%	93%	67%
45–64 years	70%	78%	61%
65–75 years	58%	67%	36%
Over 75 years	36%	29%	18%

Source: 2019, 2021, 2025 ACE environmental scans

Overall, the three surveys consistently show participation in ACE across all life stages.

5.4 Ethnicity

TEC 2024 data for learners enrolled in ACE across all provider types, as seen in Table 24, reveals the highest representation by ethnic group was European (37%), followed by Māori (25%) and Asian (22%). Only 5% identified as Pacific peoples, slightly lower than the 5.9% who identified as Middle Eastern, Latin American, African (MELAA).

Table 24: TEC-funded learners by ethnicity, 2024

2024	European	Māori	Pacific peoples	Asian	MELAA	Other	Unknown
Total % of learners (n=77,565)	37% (28,745)	25% (19,540)	5% (3,810)	22% (17,390)	5.9% (4,565)	4% (3,320)	0.25% (195)

Source: Tertiary Education Commission data

The 2024 data reported in Table 24 is similar to 2023 TEC data (reviewed but not reported here) and is not too dissimilar to 2017 TEC funded enrolments by ethnicity reported in the 2019 ACE Environmental Scan. However, in 2017, 30% of learners enrolled were reported as Māori and 8% Pacific peoples.

Table 25: TEC-funded learners by ethnicity by provider type, 2024

2024	European	Māori	Pacific Peoples	Asian	MELAA	Other	Unknown
Schools (n=18,110)	43%	13%	9%	24%	2%	8%	0.3%
PTEs (n=22,305)	15%	11%	4%	51%	15%	4%	0.07%
REAP (n=6,900)	55%	42%	0%	0.7%	0.7%	1%	0.4%
CEPs ³⁰ (n=7,635)	33%	40%	10%	9%	3%	3%	0.07%
Te Pūkenga (n=13,720)	47%	40%	2%	6%	4%	2%	0
University (n=240)	21% (50) ³¹	13% (30)	56% (135)	10% (25)	0	0	0
Wānanga (n=3,220)	8%	88%	3%	1%	0.2%	0.5%	0
Sars/EM (n=5,435)	84%	7%	0.3%	1.4%	0.1%	5%	1.7%

Source: Tertiary Education Commission data

³⁰ Community Education Providers.

³¹ Number of learners are also shown, given enrolments are small.

Table 25 reports 2024 TEC data for learner enrolments by ethnicity for each of the ACE provider types, revealing divergent enrolment trends depending on the provider. The highest enrolments by ethnicity for each provider type are in bold.

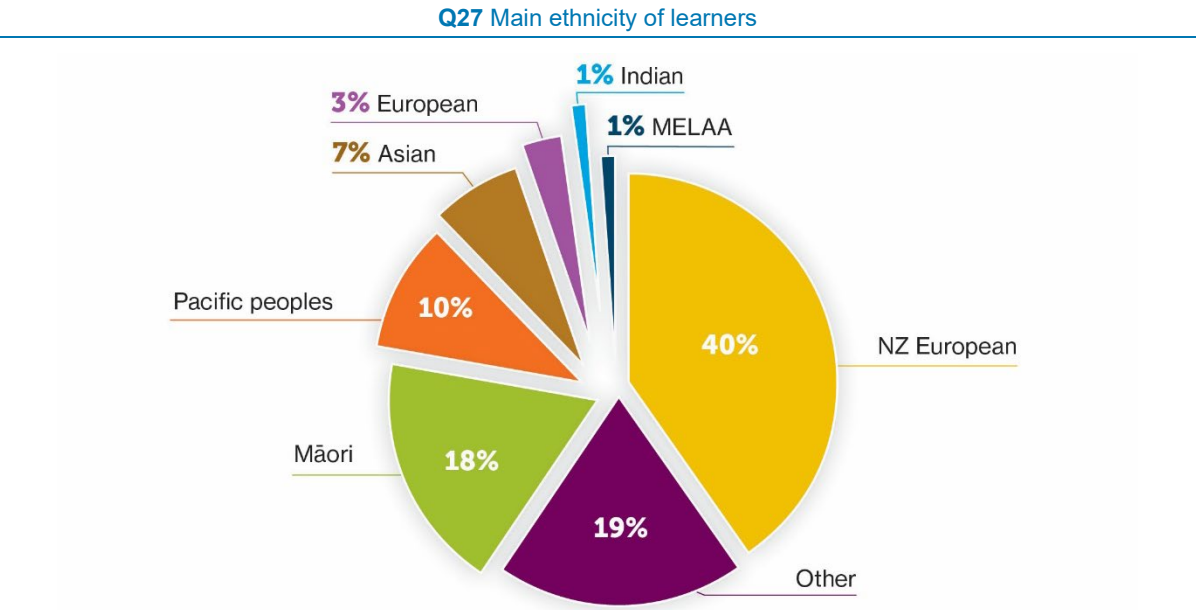
In 2024 Māori made up about 40% of ACE learners enrolled with REAP, CEPs and Te Pūkenga subsidiaries. Further, 88% of learners enrolled in ACE courses with Wānanga identified as Māori.

More than half of TEC ACE-funded enrolments at PTEs in 2024 were Asian learners and about one quarter of ACE enrolments in schools were Asian. This will reflect the English language courses delivered by these providers (as seen in Table 4 in this report).

ACE university enrolments are small, but more than half were Pacific peoples – an insight into their participation that warrants further investigation. Schools and CEPs had about 10% of Pacific peoples enrolled in TEC-funded ACE in 2024, higher than other provider types. The majority of learners enrolled in Search and Rescue and Emergency Management courses were European (84%).

Figure 13 shows main learner ethnicities identified by the 2025 survey respondents across their funded and non-funded provision.

Figure 13: Main ethnicity of learners identified by 2025 survey respondents



Source: ACE Environmental Scan 2025

Forty percent of survey respondents indicated their learners were mainly New Zealand European, 19% mainly Māori, 10% Pacific peoples and 7% Asian. ‘Other’ responses mostly referred to providers indicating their learners were an even mix of ethnicities.

6. Impact and value of ACE: Learner outcomes

6.1 Significant and wide-ranging outcomes

A key finding of the 2019 Environmental Scan related to the wide-ranging social, economic, cultural, environmental, learning, wellbeing and community outcomes learners achieved through ACE, including:

- progress to further or higher study and employment
- upskilling, job promotion, improved skills and knowledge
- improved confidence, self-belief, societal interaction, sense of community, participation and connectivity – including for older New Zealanders, newcomers to New Zealand, people living rurally, ESOL learners, Māori, Pacific peoples and second-chance learners
- citizens who are more knowledgeable and skilled, culturally and environmentally aware, connected, resilient and informed about personal, whānau and financial wellbeing.

The 2019 report discussed the important contribution of ACE to the government's priorities of education supporting literacy and numeracy, English language, te reo Māori and New Zealand Sign Language.

The 2025 survey asked respondents to indicate the common outcomes and/or value-add for learners completing their ACE courses. As with the 2019 and 2021 surveys, the following learner outcomes were those most consistently identified:

- 82%:** improved confidence and self-belief
- 75%:** improved societal interaction, participation, connectivity
- 68%:** contributing skills and knowledge to communities
- 66%:** improved health and wellbeing
- 65%:** improved skills, knowledge, cognitive abilities
- 62%:** improved cultural knowledge and identity
- 58%** improved literacy, numeracy, language
- 49%** progress to further study or training.

These consistent findings confirm the core outcomes that ACE contributes to and underscore in particular the contribution of ACE to learner wellbeing alongside growth in skills and knowledge, literacy, numeracy and language, and pathways to further learning and training.

Other outcomes reported by between 24% and 46% of 2025 survey respondents are:

- employment (46%)
- technological advancement (36%)
- enhancement to economic situations (26%)
- improved involvement in children's learning (26%)
- consciousness and understanding of civic rights and responsibilities (25%)
- living sustainably, reduced environmental impact, improved food security (24%).

The wide-ranging nature of the outcomes that ACE contributes to also came through strongly in the qualitative conversations with ACE providers. Providers spoke not only about the important learning outcomes being achieved, but also about how participation and success in ACE builds confidence, sense of belonging, self-belief and value. Social connections and relationships are also gained through participation in ACE courses. People connectedness, social inclusion, sense of achievement and purpose were deemed significant in contributing to improved mental and social wellness.

The broad nature of ACE courses (for example, civic learning, te Tiriti, learning about different cultures, AI, food security, sustainability) broadens peoples' understanding of society and the world and how they participate in community and everyday life. Participants also talked about how ACE helps people navigate changes at different and later stages of life. Some described experiences where participation in ACE had been a lifeline and, in some cases, life-changing or even lifesaving.

Through ACE, people discover that despite past experiences, they are capable of learning, that learning can be enjoyable, and that there are multiple areas of learning they can explore. This is described as a key trigger for embarking on a learning journey and lifelong learning. Ongoing learning may continue through ACE and informal learning, or lead learners into formal and accredited education. However, there is no national tracking of such pathways for ACE learners, and it is therefore not possible to understand the full extent of these outcomes in Aotearoa.

6.1.1 Specific outcomes for different societal groups

The different providers engaged with as part of the scan helped to illustrate the outcomes that learners from different societal groups achieve through participation in environments with like-minded peers. Examples are as follows.

- **Deaf learners**

According to Deaf Aotearoa, many Deaf adults have experienced inconsistent or incomplete access to education, often leading to language deprivation. This can have lasting effects on communication, literacy, and confidence. Participation in courses provided by Deaf Aotearoa provide Deaf learners "*access to education that is culturally relevant, linguistically accessible and empowering*" (ACE Aotearoa, 2025, p.11).

- **Te reo Māori**

In addition to increased understanding and comprehension of te reo and tikanga Māori, and the confidence to speak the language and engage in te ao Māori, wider outcomes gained for Māori learners include pride in self and identity, gaining confidence to help their children's learning and engage with school staff, and positive shifts in mental and spiritual wellbeing. For non-Māori, knowledge of history and te ao Māori has grown societal consciousness, social cohesion and informed advocates of te Tiriti.

- **Pacific languages**

Through language courses, many Pacific peoples – particularly New Zealand-born – are learning about their heritage and culture for the first time, contributing to positive self-identify and cultural pride. Through this self-growth, parents are also gaining the confidence to engage with school governance, management and teachers about their children's experiences and outcomes.

- **Former refugees and migrants**

English classes for former refugees and migrants are essential to their transition into a new country and society, providing a safe and encouraging learning environment. These courses develop English communication skills that strengthen social connection and cohesion and reduce isolation.

- **Older learners**

Recent research about New Zealand Men's Sheds found that:

"Men's Sheds offer a unique, male-friendly environment for shared activities, skills exchange, and peer support" and provide "a place of camaraderie, shared purpose, social connection and lifelong learning. For many men, the Shed is more than just a workshop – it's a place where they can regain a sense of identity, purpose and belonging. The peer support and companionship they find there not only improves their own mental wellbeing but can also have positive ripple effects for their families/whānau and wider communities" (Pio, 2025, pp. 4–5).

Anecdotally, Men's Sheds are attributed to saving lives.

Research for both 2019 and 2025 ACE environmental scans highlight the high participation in ACE from people in older age groups (and seen through TEC data), showing the importance of ACE and lifelong learning to their wellbeing.

The 2019 scan reported that through ACE, semi-retired, retired and older learners experience wide-ranging wellbeing benefits, including greater connectivity, reduced loneliness, improved health, stronger support networks, a sense of purpose, and opportunities to share and update skills.

The importance of lifelong learning in later years is recognised in New Zealand's Strategy for Seniors, 'Better Later Life', which states enhancing opportunities for participation and social connection as a key action. One aspect of this is lifelong learning, recognising *"lifelong learning helps people develop resilience, respond to changes, and maintain physical and mental fitness and dexterity"* (Office for Seniors, 2019).

6.1.2 Recognising contribution to wellbeing outcomes and social cohesion

Internationally, the contribution and importance of ACE to the achievement of wellbeing and social outcomes – in addition to learning, employability and economic outcomes – is recognised and stressed as significant. The outcomes identified in international literature align closely with those that ACE providers in Aotearoa have identified through the environmental scans.

Australia

The article *"Public Financing of Popular Adult Learning and Education – A Case Study Australia"* (Lucardie, 2019) discusses how participation in ACE helps adults broaden their perspectives of the world, pursue active citizenship through greater awareness of social issues such as sustainable living, build resilience and improve life satisfaction through new knowledge and skills, improve basic literacy and numeracy, build relationships and explore alternative work options.

WEA UK

WEA UK's 2025 Impact report, 'Beyond Skills: Healthy Minds and Connect Lives', surveyed its learners about wider outcomes of WEA learning. The survey had 1,690 respondents, all of whom were learners enrolled in any WEA course in 2023/24 (predominantly in England). The report found:

- all surveyed (99.9%) identified improvements in confidence and self-belief
- more than 4 in 5 (84%) adult learners with pre-existing mental health conditions had improved wellbeing
- 75% reported improvements to wellbeing after completing face-to-face courses, and 80% from online courses.

The WEA report concludes that: *"Against a backdrop of rising social isolation and increasing division, community adult learning offers a beacon of hope in fostering connectedness, togetherness and collective resilience"* (WEA, 2025, p. 4).

This is particularly relevant to the Aotearoa context, given that community connectedness and participation are reported as key outcomes of ACE, alongside increasing concern about the erosion of social cohesion in times of rapid change and its recognised importance to wellbeing.

A recent report by The Helen Clark Foundation (2025), raises concern about the potential erosion of social cohesion in Aotearoa when comparing New Zealand to Australia. The report references nationwide 2024 Talbot Mills survey results showing New Zealand lags behind Australia across nearly every social cohesion dimension: sense of belonging, sense of worth, participation, and acceptance and rejection. Significantly, providers participating in this scan have identified these first three dimensions of social cohesion as core outcomes resulting from ACE.

A 2021 report by Sir Peter Gluckman and others commented on the rapid and pervasive change we are experiencing across most aspects of our lives, placing compounding pressures on individuals, societies and governments. In this context, societal wellbeing is dependent on maintaining social cohesion (Gluckman et al., 2021).

Ireland

A profile of adult learning and education in Ireland recognises that while community education provides learning focused on objectives of employment, upskilling and progression to higher education and training, *"community education providers also offer valuable non-formal learning opportunities that lead to a range of positive personal and social outcomes and in many cases act as a bridge to formal learning"* (Cobain, 2021, p. 90).

However, like New Zealand, Ireland is without a tool to measure the social and wellbeing outcomes of ACE.

Ireland has developed a tool to understand 'distance travelled' in terms of foundation skills. The 'Pobal Distance Travelled' tool measures five 'soft skills' areas for people completing the 'Social Inclusion and Community Activation' programme: literacy and numeracy confidence, goal setting and self-efficacy, communication skills, connection with others and general work readiness. *"However, a tool to measure the wide-ranging impacts specifically of community education has yet to be developed."*

6.2 Understanding outcomes and the value of ACE

Systematically collecting data to understand the full breadth of ACE outcomes at a national level, including its social impact, appears to be a widespread challenge.

As well as the abovementioned Ireland experience, an Australian report by Cloutman (2021), referenced in the 2022 Australian ACE Environmental Scan (Devlin & Wu, 2022), referred to the profound effect non-accredited programmes have on student wellbeing, yet this has historically been poorly reported on and largely unacknowledged. The Cloutman (2021) report went on to say:

“there has been little data produced, systematically and over the longer term, that maps how students themselves feel, in detail, about the impact of non-accredited courses on their mental health and overall wellbeing, separate from their educational achievement... Nor has there been a concerted effort to map out the social impact of these types of courses” (p. 39).

“A key recommendation of the Cloutman report was for more robust evaluation of the impact of ACE programs on a learner’s wellbeing taking a broader return on investment approach” (Devlin & Wu, 2022, p. 36).

In New Zealand, ACE Aotearoa’s Sector Steering Group commissioned an ACE impact study completed by ImpactLab in 2021. The study used a social return on investment approach to estimate, in dollar terms, the social impact a programme achieves for participants over their lifetime. The study looked at four ACE providers and found a return of \$2.70 for every \$1 spent – more than double the initial investment (ACE Aotearoa, 2023, p. 11).

In 2023, Eastbay REAP, supported by REAP Aotearoa, commissioned ImpactLab to assess the social return on investment likely to be achieved for its own ACE delivery. The study found a return of \$4.90 for every \$1 invested (ACE Aotearoa, 2023, p. 11), representing more than a \$3 million social return in a single year by one REAP. This is also considered a conservative calculation, given it excluded measurement of dimensions such as increased self-esteem, confidence, sense of belonging and personal skill development. Outcomes included in the calculation were improvement in mental health, increase in academic achievement, employment, driver licensing and reduced need for emergency unemployment benefit (ACE Aotearoa, 2025, April 09).

Individual ACE providers also have their own specific frameworks, measures and benchmarks to track the progress, achievement and outcomes of their own learners and the added value of their ACE delivery. For example, in a conversation with REAP Aotearoa for this scan, it described processes focused on ensuring robust self-review. As its National Director explained:

“We need to know and want to engage in data so that we can change things if we are not getting results, and to respond quickly. We hold ourselves to account and look across all of our organisations to see if or where, we may be below benchmarks and if we are, we follow through to see what is going on. Impacts and outcomes are high on our priority. Each programme is designed to meet specific needs, such as employment. Our organisations are out there gathering the evidence, including through conversations with Police, MSD. We self-collect data on things such as identified increase in skills, percentage who have continued learning. Our learner evaluations ask about increased sense of belonging, contribution to the community, being comfortable to engage in the community.”

At the time of the 2019 scan, ACE Aotearoa had implemented a learner outcomes tool – based on surveys from registered ACE providers – to measure the difference made for learners participating in short, non-assessed courses of less than 10 hours. Information collected included the percentage of learners achieving their goals and their intentions to pursue further education. However, the tool encountered challenges and it is no longer used. ACE Aotearoa is now exploring the development of a new outcomes tool.

New Zealand does not currently have a national mechanism to capture ACE learner outcomes. Even education-specific outcomes, such as learner progression into formal education, are not tracked or reported on for specific funded provision. This is despite, for example, progression to formal education being a funding condition for Te Pūkenga subsidiaries and Wānanga.

This is the same situation identified in the 2019 ACE Environmental Scan, which reported limited national-level data captured on the impact of ACE and noted that TEC data was outputs – rather than outcomes – focused. For example, the 2019 scan stated: “While a significant component of ACE delivery is literacy and numeracy, English language (ESOL), te reo Māori, and New Zealand Sign Language, there is no national data available on the contribution of ACE to these key areas. However, ACE is a significant contributor to these national priorities” (Chauvel, 2019, p. 27).

TEC’s funding requirements and priorities direct funding to specific programme delivery and recognise the role of ACE in raising foundation skills, enhancing social and cultural cohesion, improving employability and improving health and wellbeing. Yet there is no associated reporting on ACE providers’ contribution to these aspects beyond funding and enrolments figures.

Priority 1 of the Tertiary Education Strategy 2025–2030 states that “*Provider’s performance in improving educational achievement should be assessed with a greater focus on ‘distance travelled’ or ‘value added’*” (Ministry of Education, 2025, p. 11). With regards to opportunities to strengthen measures, the Strategy elaborates further in relation to Priority 1– Achievement: “*At provider level, the TEC should explore developing ‘distance travelled’ measures and the success of programmes and providers in transitioning students into relevant employment or further learning*” (Ministry of Education, 2025, p. 27).

Both measures, applied to ACE, could add to the evidence base and understanding of ACE’s contribution to improved educational, employment, economic, social, cultural, community, environmental and wellbeing outcomes, and overall quality of life in Aotearoa.

Increased evidence of ACE outcomes could in turn contribute to lifting the profile of the sector, how it is valued and the funding it receives.

One further notable gap that persists in understanding the outcomes and value of ACE, and reported in the 2019 scan, is the absence of national survey data or research on learners’ experiences and perspectives of ACE in Aotearoa and the outcomes they achieve, beyond insights captured at an individual provider level.

6.3 Undervalued and not understood

All 10 participants spoken with for the scan considered that ACE was not valued or understood by those outside the ACE sector, and that there was a key need to lift the profile of ACE. The following are the verbatim comments from five of the participants:

“ACE is not at all valued. People outside the sector have no idea. ACE lacks visibility. I’m not sure why. Years ago, there was much more funding and ACE was much more visible.”

“Maybe ACE courses are viewed as ‘less than’. Sad how it’s viewed. Could be the narrow narrative that ACE is just for those with no qualifications, ESOL...”

“There is small recognition of the work that we do and could do. We lack a public profile. It’s the complete opposite in Australia – the government there is bending over backwards to provide support.”

“Very under-rated and only narrowly understood.”

“Outside of the sector, ACE is probably just seen as a feel-good thing but without knowing of the huge contribution it makes – to language learning, social connectivity, how it provides a safe way for people to keep up with what’s going on in society – whether digital learning, te reo, supporting older people to keep-up, and getting started on a learning journey...”

One participant even questioned if the name ‘Adult and Community Education’ was contributing to a view that the sector was not as important as other parts of the education system and thought it needed review.

Overall, the same sentiment is reported about ACE in Australia, where there is *“a sense that while popular [ACE] is ‘good’, it is an individual pursuit, a private good and is not essential in society. This lack of support has resulted in less government funding, the development of user pays systems (fees), and the application of market forces on the types, topics and delivery of popular [ACE]...”* Yet *“Popular [ACE] has played a significant role in Australian society for individuals, families and communities. Participation in these learning programmes helps adults to broaden their perspectives of the world, their society and other cultures”* (Lucardie, 2021, p. 119).

Participants of this scan acknowledged ACE Aotearoa for its work supporting ACE providers, raising public awareness of ACE activities and contribution and facilitating key annual events. However, the challenge to raise awareness beyond the sector remained. A couple of participants acknowledged the need to tell their stories better, while recognising that limited resources made this difficult. Staff are so busy *“just doing”*, everyone has little capacity left for communications.

There was a shared view from participants of a key need to raise the profile of ACE outside of the sector, including improving understanding of what ACE is and its value to society. A couple of participants considered this could be achieved by a national campaign with high visibility such as billboards, television and social media campaigns. This is also a view expressed by a previous director of ACE Aotearoa in a case study about ACE in Aotearoa published in a recent international article, who recommended that *“the ACE sector needs:*

- *A clear, compelling message on the value it adds to society*
- *A strong campaign to communicate this message to stakeholders and the community”* (McGregor, 2021, p. 86).

7. Key recent challenges to ACE delivery

As with previous surveys, and shown in Table 26, funding was the key challenge most prominently identified by the survey respondents, with 64% identifying this.

Table 26: Key challenges to ACE delivery identified by survey respondents

Key challenge	% of respondents
Funding	64%
Responding to diverse learner needs and interests	31%
Time and space to raise awareness of ACE courses, offerings and services	29%
Sufficient resourcing and infrastructure (i.e., venue)	27%
Attracting learners	27%
Measuring, demonstrating value	26%
Up-skilling and developing tutors	25%
Recruiting quality teachers	23%
Wellbeing and burnout of personnel	18%
Currency with new technology	15%
Sustainability	14%
Quality assurance, continuous self-improvement	12%
Ageing workforce	9%
Administration and management	8%
No key challenges	6%
Other	10% ³²

Source: ACE Environmental Scan 2025

The next two key challenges most identified (by about 30% of respondents) were: 'Responding to diverse learner needs and interests' and having 'Time and space to raise awareness of ACE courses, offerings and services'. These two challenges were added as new response options to the 2025 survey because qualitative feedback from the previous environmental scans identified these as challenges. They have continued as key challenges for providers in recent times.

Table 27 shows the findings to this question from the 2019, 2021 and 2025 surveys.

³² For the nine respondents who indicated 'Other', the key challenges that they identified related to: personnel matters – a lack of organisational governance experience and a lack of tutors; being a new enterprise; government changes directly affecting funding and programme provision; government funding having discontinued or misaligned with learner/community needs; expenditure and the challenge of keeping courses affordable and covering running expenses, and challenges with learners registering for a course but not showing-up or lacking commitment.

Table 27: Key challenges for ACE providers (survey respondents)

Key challenges recently experienced	2019 survey	2021 survey	2025 survey
Funding	77%	65%	63%
Responding to diverse learner needs and interests	n/a ³³	n/a	30%
Time and space to raise awareness of ACE courses, offerings and services	n/a	n/a	29%
Sufficient resourcing and infrastructure	42%	29%	27%
Attracting learners	37%	31%	26%
Up-skilling and developing tutors	36%	24%	25%
Measuring value	27%	21%	25%
Recruiting quality teachers	42%	35%	23%
Wellbeing and burnout of personnel	n/a	n/a	18%
Currency with new technology	n/a	n/a	15%
Sustainability	45%	39%	14%
Quality assurance, continuous self-improvement	16%	14%	12%
Administration and management	18%	25%	8%

Source: 2019, 2021, 2025 ACE environmental scans

Key challenges such as ‘Recruiting quality teachers’ and ‘Organisation sustainability’ were identified by more respondents in the 2019 and 2021 surveys than they were in 2025. Funding has dominated in all surveys.

7.1 The challenge of funding

Qualitative feedback from the 2019 ACE Environmental Scan highlighted that significant shifts in funding over time, including its precarious nature, created uncertainty, limited longer-term planning and reduced the breadth of course delivery.

Funding remains a key challenge for ACE providers in 2025. Survey respondents and ACE providers who participated in qualitative conversations provided extensive comments about this key challenge, offering valuable insight into the underlying reasons. The remainder of this section summarises the contributing issues identified.

7.1.1 The amount of funding is limited and insufficient

Providers described funding as ‘just not being enough’, limiting provision and available only to cover course delivery. Funding is not available for key, time-intensive administration tasks such as student enrolment, course development, preparation and planning, staff development, quality assurance and the high-level pastoral care many learners require.

“The system just does not have enough money for funding in it. Funding is not sufficient for what we do. Higher needs have come through the door. We are seeing providers no longer delivering as there is not enough funding to be able to meet needs.”

“Funding is just not enough. We want more funding so that we can more comprehensively respond to our community and so that funding reflects what we are actually paying for.”

³³ n/a indicates these questions were not asked in the survey for that year.

In the foundation learning context, one provider described the increasingly intensive support learners required due to growing literacy and numeracy challenges and complex learning needs, with funding insufficient to meet the level of need and few alternative funding options available.

The situation had been made worse where other organisations had left the community or were unable to meet learners' needs. This provider was clear that, as an ACE organisation, they do not turn people away or limit the support they offer. However, this means they are delivering a significant number of unfunded hours, resulting in financial loss.

Funding does not extend to the additional activities and responses providers put in place to reduce barriers and support individual learner success. For example, two providers spoke of providing childcare within courses to support parents to participate fully in learning, but this is not funded.

“The system itself does not consider the challenges that working with our people bring.”

7.1.2 No or minimal funding increases in recent years

A few providers referred to funding having flatlined or only increased by small amounts in recent years, with no Consumer Price Index adjustment, while the costs of operations – including venue, utilities, tutors and staffing costs – have increased. One provider spoken with said this resulted in increasing fees for some courses. Others have seen staff leave, because with the increased cost of living they can no longer afford to keep doing what they do for altruistic reasons.

The uncertain and short-term nature of funding was also identified as a contributing factor to tutors being on short-term contracts and the challenges of retaining them.

7.1.3 Funding model lacks flexibility and hinders responsiveness

Several participants described the funding system as not supporting truly responsive, flexible delivery – drivers that are a hallmark of ACE.

There is also inconsistent understanding of how TEC funding may be applied when courses need to change, which may be constraining responsiveness or leading to unfunded delivery. This was a similar finding in the 2019 scan.

For example, one large provider spoke of the rigidity of funding and belief that once TEC funding was allocated for specific courses, it could not be applied to other ACE courses if a new demand or need arose. The example given was that of pivoting to respond to strong interest during the year in AI courses, and successfully delivering AI courses that were fully subscribed, yet there was no flexibility to seek additional funding within the current funding round.

However, another large provider, who also identified a need for greater flexibility and adaptability with funding, understood that they could apply for additional funding through the year and that existing funding could be applied to new courses, provided this was reported to the TEC.

The change from TEC bulk-funding to 'mix of provision' funding in the last couple of years is said to have contributed to inflexibility and an increased need to provide granular detail when applying for and reporting on funding.

“Now it's line-by-line. Very detailed. Numbers, hours, budget. But this is all hard to predict seven months out. It's very confining but I do my best to work in and around it. Before it was more flexible and open-ended, though under bulk-funding it was more complicated. Flexibility is not so easy. We are stuck. So we have to charge at our own cost and use organisation resources and find other means to pay for staff and meet their delivery hours.” (ACE provider)

Related to this concern is the difficulty in providing the level of detail required about intended course delivery months in advance, as applications for funding need to be made in July the previous year.

“You need to apply for TEC funding in July each year for the following year ahead and so you have to give it your best guess. Funding is for programmes to meet the needs of the community. How can you understand this well so many months out in the year before. Needs change so quickly. Being responsive is at the heart of ACE.” (ACE provider)

A couple of providers specifically discussed the need for a funding model based on ‘high trust, high accountability’ and demonstrated performance.

“Rather than having us have to set out, in granular specification what we need and plan to do, why we need to do it, how many numbers we’ll have doing it (and remembering this is six months in advance), it should be high trust, high accountability. We trust you to deliver to [learners’ and communities’] needs and have allocated you x [amount] or upped your allocation based on what you’ve told us. Then get us to report on that delivery.”

“There should be a high level of trust. We know our communities well.”

7.1.4 Funding model geared to the formal tertiary sector and larger organisations

A few providers discussed challenges associated with the funding model which they considered was geared towards larger organisations and tertiary education institutes rather than community organisations. Such challenges are said to include:

- complexities with funding applications and requirements associated with enrolments and reporting
- concerns that contestable funding favours larger, well-resourced organisations over smaller organisations that may be best able to meet their communities’ needs
- the absence of a relationship manager or an existing relationship with the TEC, which it was thought limited TEC’s familiarity with an organisation’s contexts, contributions, strengths and challenges, and the cyclical factors that may impact performance at different points in time.

Organisations felt that they were only being seen by their numbers, inputs and outputs, rather than by their contribution and impact.

7.1.5 Unable to access funding

Funding, both government and non-government provided, is described as currently over-prescribed, leaving some ACE providers unable to access it. One non-funded provider spoken with for the scan said this led their organisation to make an ethical decision not to seek community funding for the time being.

A non-funded organisation for seniors discussed the hard work, challenges and lack of success in seeking both local and national government funding. Having always operated without government funding, the organisation noted the irony that its success to date without funding may potentially count against it when applying for funding – despite now facing real challenges on its ability to expand provision to meet need and demand.

The absence of ACE or other targeted funding in New Zealand for key community organisations representing older people and supporting lifelong learning is notable. For example, organisations such as Men's Sheds, SeniorNet and U3A do not receive funding. This could reflect a purposeful choice by such organisations to be member-driven and independent of government, or reflect government policy and siloed funding settings.

This seems to be the opposite situation in other jurisdictions. For example, while the establishment and operation of Men's Sheds in Australia is quite different from New Zealand, one million dollars in funding each year is provided to support Men's Sheds in Australia. A specific established contestable government fund is in place and aimed at supporting Men's Sheds to better respond to the needs of their members and communities.

The National Shed Development Programme is a programme of the Australian Government Department of Health, Disability and Ageing. It provides direct financial assistance for the purposes of supporting the health and wellbeing of members, delivery of activities and programmes, facilities and the sustainability of Sheds. Grants can be given for the building or refurbishment of Sheds, and to contribute to wellbeing.

Similarly, the government in Ireland has an established fund in place aimed at supporting Men's Sheds with their operational costs such as power and insurance.

However, as reported earlier, the importance of lifelong learning and social participation and connection for older people is well recognised, and there is high participation of older people in ACE.

7.2 The challenge of time and space to raise awareness of ACE

A theme reported earlier in this report is the perceived low profile, limited understanding and undervaluing of ACE in Aotearoa from those outside the sector.

From the perspective of a few providers spoken with for this scan, there is little additional time and few resources available to raise the profile of ACE in their communities, including marketing and raising awareness of ACE courses, offerings and services. There is little to no budget available for this, and it is overtaken by the demands of other priorities, such as course development and scheduling, tutor recruitment and organisation, supporting learners with course planning, queries and enrolment processes.

“Marketing is really hard. There is so much more we could do, but we just do not have the time or resource. Each time a new person enrolls, there's a lot of time and work required. And as new courses develop, new tutors need to be found... It all takes time.”
(ACE provider)

A participant from a non-funded community organisation said their key on-the-ground personnel and volunteers in coordination and management roles have variable comfortability and skills in marketing and profile-raising activities, as well as limited time to do so. Targeted training and support for volunteers, coordinators and others in these roles was considered lacking in this regard.

Feedback on the key challenge of responding to diverse needs and interests was largely provided to the survey question about recent trends – specifically the trend of learners presenting with greater and more complex needs, and changes to learner demographics. Therefore, this is reported on in the next section.

8. Key recent trends

Survey respondents were asked about main trends experienced with their ACE delivery in the last five years. The three trends with the highest responses were:

- learners presenting with more challenges or complex needs (46%)
- decreased funding (45%)
- learner circumstances or reasons for enrolling having changed (43%).

Table 28 shows the percentage of respondents identifying different key trends experienced.

Table 28: Key recent trends experienced by survey respondents

Key recent trends experienced with ACE delivery	% of respondents
Learners presenting with more challenges, more complex needs	46%
Funding has decreased	45%
Learner circumstances or reasons for enrolling have changed	43%
Tutor availability has decreased	31%
Learner demographic has changed	26%
Online learning: demand for this mode has increased	26%
Learner numbers have increased	25%
Partnering with other organisations has increased	24%
Increased demand or need for tutor professional development and upskilling	19%
Learner numbers have decreased	18%
Main course delivery has changed	15%
Other	11%
Partnering with other organisations has decreased	6%
Tutor availability has increased	5%
Funding has increased	3%
Online learning: demand for this mode has decreased	3%

Source: ACE Environmental Scan 2025

Of the 110 respondents, 73 chose to provide optional comment about reasons for the trends identified – comments either related to a specific trend or to more than one trend. These insights were valuable to understand more about the trends identified and are summarised below, alongside related feedback provided by participants who took part in conversations following the survey.

A couple of respondents commented on interrelated, contributing factors that traverse different key trends affecting ACE delivery in the last five years. Their comments are as follows:

“Funding cuts have required service adjustments and stronger partnerships to sustain delivery. Learner needs have become more complex due to rising cost-of-living pressures, employment instability and mental wellbeing challenges. This has changed demographics and reasons for enrolment. Demand for online learning has dropped as many learners now prefer in-person, relationship-based learning and community connection post-COVID.” (Survey respondent)

“Governmental changes affecting funding, programme provision and partnerships with other tertiary providers. COVID lockdowns have increased demand for flexible study arrangements such as online learning, learner needs have become more complex due to various factors, learner numbers have increased due in part to high unemployment within the motu.” (Survey respondent)

Whereas these two survey respondents had differing experiences of demands for online learning post-COVID, they both highlighted the impact of funding shifts on changed provision and partnering. They also highlighted higher unemployment or employment instability as a contributor to key trends experienced, and learners’ needs having become more complex.

Feedback from respondents about the trend of decreased funding is reflected in the commentary about key challenges summarised in Section 7. Respondents provided comment specific to the factors contributing to the other two most identified trends. This is summarised below.

8.1 Learners with greater challenges, complex needs and change in learner demographics

Survey respondents’ observations about the reasons for the two trends of learners presenting with more challenges or complex needs, and changes in learner demographics, were intertwined and were said to relate to:

- there being more complexities for whānau and the challenges they need to deal with
- learner needs becoming more complex due to rising cost-of-living pressures, employment instability and mental wellbeing challenges. This has changed learner demographics and reasons for enrolment (referred to below)
- changes in the demographic of prisoners
- rising and higher unemployment
- the removal of first-year fees-free funding
- government focus on growing international numbers
- increased need from migrants and former refugees looking for language classes and social connection
- learners’ diverse range of socio-economic and cultural backgrounds, literacy levels, accessibility needs and disabilities
- more people identifying with neurodiversity: *“With more people identifying with neurodiversity, it has become more difficult to teach with mainstream style teaching, needing more one-on-one and catered towards their needs which can be stressful at times and difficult to manage the class.” (Survey respondent)*

One large national provider whose learner cohort is about 50% of people with no or low qualifications, described a shift in its learner profile that has taken place, particularly for youth. With a reduction of local organisations and social services, they are now picking up and supporting a new cohort of disengaged learners coming from different referral pathways – for example, referrals from Oranga Tamariki and learners on curfew. These learners have much more complex needs, meaning that more intensive, one-on-one support is required. There is also a need to run foundation courses separate from other adult learners, given needs are so different (but without additional funding).

8.2 Learners' circumstances and reasons for enrolling have changed

"The cost-of-living crisis has definitely impacted the reasons for learners enrolling on our programmes." (Survey respondent)

Related to the above key trend, survey respondents identified the following factors as having influenced a shift in learners' reasons for enrolling in ACE courses:

- *"the cost of living crisis, COVID, change of government"*
- *"higher unemployment, learners who had jobs now looking to upskill to change careers and employment"*
- *"more people wanting to study nationally recognised qualifications due to pay related motivation"*
- *"with an ageing population, older people are seeking courses for social connection and the sharing of knowledge, as opposed to upskilling".*

8.3 Decreased tutor availability

About one third (31%) of the survey respondents identified decreased tutor availability as a recent trend. Several respondents also commented on this trend, identifying the following contributing factors:

- challenges of attracting tutors as the pay system is not good. There is constant tutor turnover due to an expectation of higher wages that cannot be met
- tutors are now more likely to have to take on other or increased levels of work to make ends meet, impacting availability
- volunteer tutors are less available and more difficult to recruit as they are now more likely to have increased competing demands on their time
- the ageing of quality, experienced tutors.

"Our tutors are not as available as they once were as they are likely to have other jobs, so we need to work classes around this. To do this we run some courses in the evenings and in the weekends." (Survey respondent)

Findings from research conducted by Volunteering New Zealand (Go, 2024) about changes in the availability of volunteers may be relevant to this trend identified, and the volunteer ACE workforce. These findings include that:

"Some voluntary organisations have struggled to recruit new volunteers during the rising cost-of-living. Social conditions increase demand for services, while fewer volunteers are available" (Go, 2024, p. 8).

“There has been an increase in the number of volunteers performing ‘casual volunteering’ of a few hours a month.” This is as opposed to a greater volunteer time commitment... “This trend is reflected across the board, with casual volunteering on the rise across different sectors of volunteering, across the regions, and among different age groups (except those aged 76 years and over, where casual volunteering is not prevalent)” (Go, 2024, p. 12).

8.4 Comments about other trends

Other more general comments from survey respondents about recent trends are as follows:

“We have experienced a demand with our ACE courses and sometimes run out of funding due to numbers of learners.”

“The funding rate for ACE has stayed almost static while the costs of tutors, rents and resources have increased.”

“Post COVID engagement has decreased and not bounced back. Challenges are many providers offering similar courses, lack of time, money for constant networking, promotion of programmes.”

“Participants are too shy, anxious, unsure of what to expect when they come to a course. Sometimes this self-doubt will stop them from attending even if they have enrolled.”

“Changing circumstances of those in the older age bracket – more are working longer, have more debt and financial hardship.”

8.5 Key societal events impacting recent trends experienced

As well as asking respondents to spontaneously comment on the factors that they saw as having contributed to the trends they identified, the 2025 survey then had a subsequent question that listed different societal changes or events in the last few years and asked respondents to indicate if any had played a key part in these trends.

Table 29 shows the percentage of respondents indicating the specific events that have impacted.

Table 29: Societal events impacting recent trends by survey respondents

Societal events	% of respondents
Increased cost of living	72%
Change in government, government policies	68%
COVID-19	62%
Redundancies, increased unemployment	40%
Growth of AI, technological advancement	35%
Extreme weather, climate-change related events	22%
Closure of factories, businesses	19%
None of the above	9%

Source: ACE Environmental Scan 2025

The three events identified by more than 60% of respondents are:

- increased cost of living:72%
- change in government, government policies:68%
- COVID-1962%

Redundancies and increased unemployment were identified by 40% of respondents.

These responses align with the qualitative feedback reported above. It confirms the role that these events have had in shaping the key trends experienced, particularly impacting trends of learners with more complex needs, changed learner circumstances, changed learner demographics, changed reasons for enrolling, decreased funding and decreased tutor availability.

8.5.1 COVID-19

Respondents' comments about the impact of COVID-19 also related to the following trends of decreased learner numbers and attendance, and less demand for online learning.

Decreased learner numbers were linked to experiences of COVID-19 lockdowns, and which have taken a long time to recover from. However, there was an overall sense that learner numbers have now returned to pre-COVID levels. This is seen in the TEC data. Providers seem to be experiencing high demand, although some are still challenged.

A few respondents' comments about a trend of decreased learner attendance indicate this as a longer-term impact of COVID-19, with the observation that learners were now absent for longer periods due to illness than before.

A decrease in demand for online learning was also identified as a longer-term impact, with the view that following lockdowns and experiences of online learning during COVID-19, learners now preferred relationship-based, in-person learning and community connection.

8.6 Impacts of rapid change

Post-COVID, *"major ongoing technological, demographic, economic, social, geopolitical and environmental changes continue to challenge individual and societal resilience in profound ways"* (Gluckman et al., 2021, p. 4).

The crucial place of adult learning and education in times of rapid change, disruption and occurrences of adverse environmental and health events is discussed by the UNESCO Institute of Lifelong Learning (UIL) in a sixth global report working paper (UIL, 2024). This reports that in such times where people feel overwhelmed, uncertain and helpless, adult learning and education becomes essential.

Adult learning and education can empower adults to actively and positively transform their circumstances, their lives and communities. In such times, it is important to continually update knowledge and skills, participate in civic life and understand surfacing issues. Whereas traditional education systems can be slow to adapt, adult learning and education *"provides flexible, accessible and responsive learning opportunities that enable adults to build the competencies needed to thrive in an era of constant change"* (UIL, 2024, p.2).

This recognises the important contribution ACE can make due to the scope and nature of the learning it provides, alongside its unique features such as high levels of flexibility, responsiveness and accessibility.

Peter-Clinton Isaac Foase, President of the Asia South Pacific Association for Basic and Adult Education, also discusses the important place of ACE in these times. In an article for the ACE Aotearoa Spring newsletter (ACE Aotearoa, 2025), he points to the strength and importance of the ACE sector as a platform for collective learning and action, and to restoring a sense of connection and shared purpose at a time when many feel isolated through experiences of artificial intelligence, misinformation, conflict and emergencies, and polarising ideologies (pp. 12–15).

8.6.1 UIL member states' priorities for adult education

In 2023, UIL member states³⁴ identified four rapid and widespread contemporary changes as a key challenge and opportunity for adult education when determining priorities towards implementing the Marrakech Framework for Action³⁵. The four changes are economic transitions, climate change, digitalisation, and conflict and post-conflict situations.

Regarding economic transitions, the UIL refers to the place of adult learning and education's ability to help people – especially those unable to access formal education – to navigate economic transitions and an uncertain employment landscape through flexible learning pathways to upskill and reskill. This aligns closely to the economic focus of New Zealand's new Tertiary Education Strategy 2025–2030.

For climate change, ACE is recognised as fostering critical thinking and civic engagement important to understanding climate change and sustainability, and to helping “*build the grassroots movements necessary to hold leaders accountable and ensure the implementation of effective climate policies... [ACE] equips communities to challenge ineffective policies and demand stronger commitments to sustainability*” (UIL, 2024, p. 10).

For digitalisation – and notably the emergence of generative AI – the UIL report recognises the digitalisation of adult learning and education towards attaining the United National Sustainable Development Goal 4: inclusive and equitable lifelong opportunities for all. Online learning platforms and interactive technologies, including AI, are recognised as enabling education to be more flexible, interactive and accessible. Important to this is the enhancement of the digital competence of adult learners and ensuring this is equitable.

ACE is recognised as playing an important role in developing critical skills people need to safely and confidently navigate technological shifts and keep up with the growing role of digital technologies in everyday life. This includes in work, accessing government and health services, and participating in communities. “[ACE] can act as a driver of change by preparing individuals to critically engage with technological advances and address the societal challenges that arise from these changes, such as the ethical use of AI, data privacy concerns and the regulation of digital platforms” (UIL, 2024, p. 6).

³⁴ New Zealand is a member.

³⁵ A UNESCO commitment adopted in 2022 by 142 member states to advance adult learning and education towards 2030 and beyond.

9. Future focus

Despite the key challenges identified and reported in Section 7, survey respondents indicated confidence that their organisations are well positioned to meet the needs of learners and communities going forward. Respondents were asked to rate this level of confidence on a scale of 1 (very low) through to 5 (very high). The weighted response average was 3.9.

9.1 Importance of online learning in future ACE provision

Respondents were asked whether online learning has an important place in future ACE provision. Rating this on a scale of 1 (very low importance) to 5 (very high importance), the average response was 3.8, indicating importance, though 9% were unsure and did not provide a rating.

Comments made by respondents about online delivery indicated there is demand or a place for online learning for three main reasons:

1. to meet the needs of learners who prefer the flexibility and ability to work remotely
2. to enable access and participation, particularly to meet demand in remote or rural areas where it can be challenging to attend in-person and where tutors may not be based
3. in response to increased costs of living and travel costs.

“We have many calls to deliver our programmes in rural or remote areas. It's difficult, and expensive to deliver in spaces where we have no facilitators, so online learning is critical.” (Survey respondent)

Further, the option of online learning becomes critical when communities are physically cut off due to road closures, transport challenges and communications' failures during severe weather events. This has been experienced across parts of New Zealand since 2023, including Tairāwhiti, Hawke's Bay, Coromandel and parts of Eastern Bay of Plenty.

Others who had seen a decline in demand for online learning attributed this to a strong post-COVID preference for in-person, relationship-based learning and social connection, and the sense of belonging and feeling valued that comes with in-person togetherness.

All providers spoken with for this scan considered face-to-face, in-person learning was far preferable to online learning for ACE, particularly given the higher level of learner engagement it enables. But there was also recognition that online options are important for providing access, especially where in-person learning is not possible or preferred, and for learners in rural or isolated locations. If online learning was delivered well, much could be achieved.

For funded provision, it is a positive shift that the TEC has removed a 2025 funding condition that stipulated ACE programmes could only be delivered face-to-face, unless approval was granted for another form of delivery in exceptional circumstances (TEC, 2025). For 2026, TEC-funded ACE programmes can be delivered:

- synchronously online (delivered in real time to the learner) where this is in the best interests of the learner/s. This requires consideration of ‘enabling access to education’ and the organisation’s ability to deliver effectively (including delivery method, pastoral care and learning support); or
- asynchronously with prior approval from the TEC and if there are exceptional circumstances (TEC, 2026).

Hence, it will be important to keep focus on how online ACE provision unfolds in the future, alongside sector support needs and opportunities for shared and continuous learning.

9.2 Importance of AI and technological developments in future ACE provision

Survey respondents considered that AI and technological developments have an important place in future ACE provision. Rating this importance on a scale of 1 (very low importance) through to 5 (very high importance), the average response was 3.8 – though 11% of respondents did not provide a rating as they were unsure.

Three providers spoken with for the scan mentioned the demand for, and importance of, providing ACE courses to support AI literacy and use, but also for people to learn about the issues and challenges with AI, and how to spot misinformation and disinformation.

“Disinformation is a threat. We educate our staff and the public. This will continuously evolve. We will continuously look at what we can do to educate the public. AI is a change area and major objective for ACE.” (ACE provider)

One large provider said it has seen demand for AI courses overtaking demand for basic computing, and accordingly responded to that demand by delivering AI courses that are at full capacity, and tailored to using AI in different contexts.

A couple of providers also spoke of the functional benefits AI had provided in their administrative work, such as writing course descriptions, planning and developing learning plans.

ACE Aotearoa is keeping at the forefront of supporting the sector’s focus on AI. Its 2025 conference – *AI | AI: Bridging Artificial and Ancestral Intelligence* – engaged participants in thinking about the safeguarding of ancestral knowledge from misuse and enabling Indigenous communities to lead and define how their histories and wisdom are used in the digital age. The conference also examined the integration of ancestral intelligence, including indigenous language, cultural data, values and historical knowledge, into modern technologies like AI. Use of AI as a tool for good to share ACE stories, expand access to learning and preserve culture for future generations was a key focus (ACE Aotearoa, 2025, July 02).

ACE Aotearoa’s 2026 conference responded to feedback from the previous year and continued this work, moving beyond theory and ethics to the practical application of artificial and ancestral intelligences for transformative learning.³⁶

³⁶ <https://www.aceaotearoa.org.nz/events/ace-conference>

9.3 Funding and funding priorities

The significant funding challenges identified through this scan confirm this is an important area of continued focus, alongside the unfunded work of ACE providers in responding to learners' increasingly diverse and complex needs – particularly in foundation learning.

Both funded and non-funded ACE provision contributes significantly to enriching people's lives across all life-stages and in many different ways, delivering on wellbeing, social cohesion and quality of life outcomes. As discussed, there is a need to better understand, track, value and recognise these outcomes.

New Zealand's latest Tertiary Education Strategy 2025–2030 published in December 2025 (Ministry of Education, 2025) will guide sector funding and priorities over the next five years. Unlike its predecessor, this Strategy lacks specific reference to ACE, including in a section that refers to 'provider roles and expectations' in delivering the Strategy and only lists formal tertiary education providers. From an external sector perspective, and in the absence of a specific ACE or national lifelong learning strategy, this seems to neglect recognition of the important contribution and place of ACE in the adult learning landscape in Aotearoa. Nonetheless, the objectives of the Strategy are ones that the ACE sector is a proven and strong contributor to.

For example, the overarching objective of the Strategy is for a *“tertiary education system that enables people to succeed with knowledge and skills that advance an innovative, high-productivity economy, and improve quality of life”* (p. 6). The Strategy's focus on economic growth, and the skills and knowledge needed for this, includes tertiary education systems that help underserved communities realise aspirations.

ACE has a core role in supporting people to develop knowledge and skills and contribute to the economy and improve peoples' quality of life. As seen through this scan, and recognised by the UIL, ACE has a key place in being able to help people – especially those who have been unable to access formal education – navigate economic transitions and an uncertain employment landscape by engaging in flexible learning pathways to upskill and reskill (UIL, 2024, p. 10). In addition, information on learner participation in ACE reported in this scan shows strong participation of underserved learners in ACE.

Priority 1 of the Strategy is 'Achievement' and ensuring that students and trainees gain skills that lead to good careers and economic security. This priority recognises the importance of strong pathways between school, tertiary education and work. ACE is a vital and strong 'in between' pathway for those not in the formal education system. Its breadth of courses that focus on skills development, upskilling, entrepreneurship, financial literacy and subsistence are important to this. A high proportion of ACE learners initially come to ACE without such skills.

Access and participation in training and education for all is another of the Strategy's priorities (Priority 3). It is well recognised that a hallmark of ACE is its ability to attract and engage people in successful learning who have disengaged from formal education settings. This priority specifically refers to ensuring foundation education programmes meet the needs of young people with limited work experience and educational achievement, and supporting adults with low or no qualifications to re-engage with education – both of which are at the core of ACE.

Overall, with regards to the priorities of the Strategy, as recognised in the latest Australian ACE Environmental Scan, ACE providers:

“Engage people who are socially and educationally disadvantaged, providing opportunities to access pathways to formal education, training and/or jobs.”

“The ACE sector has strong expertise in delivering basic adult education programs (e.g. language, literacy, numeracy and digital) that offer pathways into further learning and work, as well as essential life skills. Many ACE providers also provide or partner with social and community services to support learners through life challenges or barriers to learning” (Devlin & Wu, 2022, p. 46).

9.4 Understanding value-add and the outcomes of ACE

As this and the 2019 Environmental Scan show, there remains a gap in national tools or funder reporting on the value-add and outcomes being achieved by ACE. This remains as a future focus for the sector.

One significant gap is the absence of any national process or research to gather ACE learner voices from across the diverse parts of the sector, to understand the learning experience and how ACE adds value and changes lives. Similarly, much more could be understood about the ACE tutor workforce, both paid and unpaid.

One participant considered that a universal ACE student management system would be ideal.

As mentioned earlier, the new Tertiary Education Strategy has a specific focus on improving understanding of learner pathways, distance travelled and the value of outcomes – providing an opportunity for improvement in this area.

9.5 ACE Aotearoa

While the 2025 survey did not specifically ask respondents about ACE Aotearoa, several spontaneous comments were shared in response to the open-ended ‘any comments’ option. These comments were largely complimentary of the value and work of ACE Aotearoa. Examples include:

“ACE [Aotearoa] is the glue that holds us all together – providing professional development, support, networking, information on trends, and most importantly an informed voice to be heard by Government.”

“I have attended two ACE Conferences in Wellington and Christchurch. Both have been inspirational and transformational and I have been able to fill my own kete so that I can go back home and continue serving as a tutor.”

“ACE Aotearoa is exceptional and most efficient in its operation ... ACE [Aotearoa] offers outstanding courses and the Hui Fono are exceptional, uplifting and great for networking. Thank you ngā mihi.”

The conversations that took place with ACE providers as part of this scan included a question about how ACE Aotearoa could support their organisation and/or the sector better.

Predominantly, participants spoke of the contribution that ACE Aotearoa makes, and that what it currently does meets both organisation and sector needs well. For example:

“There is nothing more ACE Aotearoa could do. They do really well. I really appreciate them. It’s been great to have [them here in our community]. I feel very well supported. I feel that I can contact them whenever. I love what they do – the conferences, online resources. I know that they are there to liaise with the TEC. Keeps us visible.”

Participants described ACE Aotearoa as highly responsive and accommodating. It was considered to have ‘a powerful punch for a small organisation’, with a couple of participants referring to feeling secure knowing they have this sector support and representation, and an organisation who liaises with the TEC and the Ministry of Education on issues affecting the sector.

Most commented on the professional development provided by ACE Aotearoa and were complimentary about its relevance, impact and quality – especially the quality of the facilitators. Key events and resources were also appreciated, for example, regular newsletters that share stories about what diverse providers across the country are doing, giving them inspiration and ideas.

“All of our staff attended the ‘Successfully Teaching Adults’ workshops. It was a big help for our staff who run and facilitate different sessions with adults from diverse backgrounds, to be able to learn techniques. We haven’t been able to offer this ourselves. The Adult Learners’ Week is important, celebrating literacy and bringing everyone together. ACE Aotearoa is amazing. Very supportive. What they do and provide is more than enough for us.” (Survey respondent)

9.5.1 Broadening and increasing professional development

As reported earlier in this scan, there appears to be an opportunity for ACE Aotearoa to consider a need for professional development provision for directors, managers and coordinators, including at the grassroots level, in areas such as effective systems and management, delegating, seeking and applying for funding, fundraising, strategising and marketing. There may also be a need to review how professional development can be contextualised for organisations who provide niche or specific ACE provision. Further, the continued demand exceeding funding available for professional development grants may be an area for exploration with the TEC.

9.5.2 Supporting UNESCO learning city status

One international initiative that Aotearoa is not yet a part of is the UNESCO Global Network of Learning Cities. Launched in 2013, cities can apply for UNESCO recognition as a learning city that promotes lifelong learning for all. Currently there are 425 learning cities across 91 countries. According to the UNESCO webpage, *“UNESCO Learning Cities are dynamic communities where learning is embedded in everyday life – across schools, workplaces, libraries, homes and public spaces. They create opportunities for all: reskilling and upskilling workers to meet evolving job markets, providing literacy for those who missed out in early years, equipping youth and adults to take climate action, empowering citizens of all ages to navigate and shape the AI era, and fostering entrepreneurial mindsets.”*³⁷

³⁷ <https://www.unesco.org/en/articles/72-cities-46-countries-join-unescos-global-network-learning-cities>

During the qualitative conversations, one of the participants indicated they had been in discussion with ACE Aotearoa about the potential of applying for Auckland to become a UNESCO learning city. This seems a valuable opportunity and focus for sector support, and one that ACE Aotearoa is supporting.

9.5.3 Political engagement

One provider suggested it would be beneficial for ACE Aotearoa to engage with political parties in the lead-up to the 2026 election to understand each party's position on ACE and share this with the sector.

9.5.4 Relationship building and growth

Another area for ongoing consideration is continued work to build relationships across the ACE sector and with different organisations. Several participants spoke positively about new relationships established with ACE Aotearoa and the potential and hope of what could be achieved through opportunities to continue to collaborate.

One participant from a small community with little ACE provision thought it would be of real value if ACE Aotearoa could come to such communities to raise understanding of what ACE looks like and inspire participation in the community. This participant also suggested a one-day hui of all ACE organisations – not based on one theme, but focused on connections, sharing and growth.

This links to an identified need to better understand and engage the non-funded ACE sector. Relevant questions raised by one participant included: how can ACE Aotearoa or the ACE sector be more inclusive of non-funded ACE providers, to ensure their voice is heard and their experiences and needs represented? And how can non-funded providers be better supported to strengthen the quality of their provision?

9.5.5 Increasing the profile and understanding of the value of ACE

A common key theme that has emerged from this scan is the need to raise the profile of ACE outside the sector, to increase understanding of what ACE is, and the significant individual, whānau, community, societal and economic value it contributes. Raising political awareness presents as a key area for ACE Aotearoa's consideration. As one ACE provider commented during a conversation for the scan:

“ACE Aotearoa is in the space to advocate about the value that ACE adds and to make sure that we don't lose funding for it. Share about the value-add and the number of different ways that ACE is provided. Push it out wider. Build New Zealand's understanding. Ensure that ACE is understood, valued, not forgotten, and not taken off the political agenda.”

This need is multidimensional and reflects the diverse impact of ACE. On one hand, the significant work of ACE in supporting foundation, disengaged and underserved learners – their positive engagement, aspirations and success – needs to be better understood, measured and valued. On the other hand, the profile of ACE as not just 'foundation-focused' or for the underserved needs to be clearly seen. The contribution of ACE to skills and knowledge development across many areas – the pursuit of further education, better employment opportunities and entrepreneurship, civic participation, environmental sustainability, and the enrichment of lives, social cohesion and wellbeing – deserves to be well showcased, understood and furthered.

Appendices

Appendix A. ACE Environmental Scan 2025: Survey respondents by provider type

The following table provides a breakdown of the percentage and number of survey respondents by 'provider type'.

Provider type	% of respondents
Community organisation	48% (n=53)
School-based	14% (n=15)
Private Training Establishment	11% (n=12)
Rural education provider	9% (n=10)
Library ³⁸	5% (n=5)
Te Pūkenga subsidiary	5% (n=5)
Workers Education Association	3% (n=3)
Private business	3% (n=3)
Council (local government)	2% (n=3)
University	1% (n=1)

Source: ACE Environmental Scan 2025

³⁸ 'Libraries, private businesses and councils were not specific response options provided in the relevant survey question. However, through the 'other' survey response option, these responses were given.

Appendix B. Different community organisations and PTE respondents

Survey respondents to the 2025 scan were asked about the best categorisation of their organisation if they were a community organisation or PTE. The categorisation of organisation by percentage of respondents is shown in the following table:

Organisation category	% of respondents
Learning or education centre	25% (n=19)
Literacy and Numeracy provider	25% (n=19)
Community centre, house, space, hub	22% (n=17)
Cultural group	16% (n=12)
English language provider	15% (n=11)
Pacific Peoples organisation	12% (n=9)
Iwi or Māori organisation	11% (n=8)
Library	11% (n=8)
Rural education provider	9% (n=7)
Youth-focused group	9% (n=7)
Women's-focused organisation	9% (n=7)
Refugee or migrant service	8% (n=6)
Older person's focused organisation	7% (n=5)
Disability focus ³⁹	5% (n=4)
Marae	5% (n=4)
Men's focused organisation	4% (n=3)
Health provider	4% (n=3)
Church	3% (n=2)
Aged-care provider	1% (n=1)

Source: ACE Environmental Scan 2025

A rainbow organisation and an organisation for prisoners were among the respondents who selected the 'other' response option.

³⁹ This was not a specific survey response option, but was identified by respondents through the 'other' response option.

Appendix C. Timeline of milestones in ACE post-colonial history 1842–2021

The following timeline is compiled from the account of the history of ACE from an article on sixty years of adult learning in Aotearoa, by Diane Amundsen (2020).

1842	Mechanics Institutes in Wellington and Auckland offer evening classes to working men
1895	Manual Technical Instruction Act enables the establishment of technical schools and colleges offering evening classes in technical and general subjects
1915	Workers' Educational Association (WEA) formed, becoming the main adult education provider for men and women in literature, economics, psychology and the arts (WEAs remain today)
1947	National Council of Adult Education (NCAE) established to foster adult education and cultivate the arts
1960s	Movement-based education grows, focusing on social and political issues and Māori rights
1960s–1970s	University and WEA provision dominate alongside technical institutes
1970s	The concept of lifelong education emerges as a central focus
1972–1975	Labour Government expands adult education for social democratic and vocational purposes. ACE offered widely through community colleges and universities, notably through Centres for Continuing Education. Voluntary organisations are state funded REAP are instituted (and remain today) Adult Reading and Learning Assistance Federation literacy programmes grow significantly – the roots of which remain today in Literacy Aotearoa
1980s	Strong Māori educational growth Te Ataarangi is formed in 1982 (and remains today) Technical colleges become divided into upper secondary schools and Institutes of Technology and Polytechnics Community colleges proliferated regionally Decline in adult and community education funding
Approaching the 1990s	Funding stagnates; NCAE and other organisations decline. NZ Association for Community and Continuing Education has a key voice in the 'Save Adult Education' campaign (later becomes ACE Aotearoa as known today)
1990	Education Amendment Act begins a neoliberal tertiary education sector framework, merging all post-compulsory education under the umbrella of 'tertiary education' A focus grows on credentialed, job-outcome-centred education, diminishing social, community and active citizenship education Despite the ACE sector's economic setbacks, no community organisations closed down due to considerable reliance on voluntary and low-paid workers
2000s	Under a new Labour government, tertiary education expanded to include REAP, ACE-funded schools, voluntary organisations and community groups
2003	Tertiary Education Commission (TEC) established to oversee, plan, fund and monitor all post-compulsory education (as it is today) All post-compulsory education under one umbrella of tertiary education governance and funding TEC narrows ACE funding to governmental goals of raising foundation work-related skills
2008	National government introduces major ACE funding cuts ⁴⁰
2012	ACE funding to universities ceases; many Centres for Continuing Education close Non-formal education shifts toward formal tertiary providers 'User-pays' ideology develops. ACE funding focus narrowed to preparation for employment and skills for work
2020–2021	COVID-19 disrupts ACE delivery; many providers struggle with digital access barriers and large drop-offs in attendance Government invests an additional \$16 million over four years in the ACE sector through the 'Wellbeing Budget', including a focus on social cohesion, wellbeing and vocational programmes

⁴⁰ As reported in the 2019 ACE Environmental Scan, in 2010, WEA funding ceased and ACE in Schools lost about \$13 million of government funding, translating to a reduction in 212 schools delivering ACE in 2009 to 24 in 2010.

Appendix D. TEC-Funded provision by territorial authority 2018-24

The following table shows the number of TEC-funded ACE providers delivering in each territorial local authority in New Zealand, 2018–2024.

Territorial Local Authority	2018	2019	2020	2021	2022	2023	2024
Ashburton District	1	4	7	8	18	19	22
Auckland City	261	341	266	338	338	360	358
Buller District	24	54	48	48	80	87	82
Carterton District	5	1	2	6	0	0	0
Christchurch City	86	91	82	100	107	105	109
Central Hawke's Bay District	17	3	6	5	15	7	10
Central Otago District	12	12	13	105	105	117	89
Clutha District	0	0	0	24	18	3	3
Dunedin City	12	16	11	14	12	13	14
Extramural	0	0	0	6	20	13	4
Far North District	71	102	55	62	67	90	69
Franklin District	6	11	30	36	43	44	34
Gisborne District	44	38	33	36	36	33	27
Gore District	11	93	89	145	58	141	212
Grey District	9	6	11	10	18	31	47
Hamilton City	32	15	12	14	41	33	17
Hastings District	3	2	2	4	2	5	3
Hauraki District	2	4	1	4	8	31	34
Horowhenua District	10	14	13	18	33	17	16
Hurunui District	0	0	1	0	1	0	1
Invercargill City	4	6	6	16	19	21	23
Kaikōura District	1	1	2	0	47	50	18
Kaipara District	3	5	7	12	3	4	3
Kāpiti Coast District	11	10	6	11	13	7	6
Kawerau District	6	4	3	6	18	25	21
Lower Hutt City	21	20	14	14	18	8	14
Mackenzie District	0	0	0	2	3	1	0
Manawatū District	6	20	4	11	53	11	10
Manukau City	60	30	140	109	125	139	110
Marlborough District	32	33	34	73	110	130	100
Masterton District	54	66	76	75	103	68	50
Matamata-Piako District	2	2	2	3	7	3	3
Napier City	8	10	9	13	10	13	15
Nelson City	14	17	15	13	8	12	14
New Plymouth District	24	20	16	21	29	36	20
North Shore City	21	38	37	38	10	12	20
Ōpōtiki District	12	6	5	5	21	19	23
Ōtorohanga District	0	0	0	0	0	1	0

Territorial Local Authority	2018	2019	2020	2021	2022	2023	2024
Palmerston North City	10	31	16	27	22	37	22
Papakura District	6	7	35	57	74	74	69
Porirua City	15	28	22	21	21	16	19
Queenstown-Lakes District	5	17	56	58	35	49	63
Rangitikei District	14	26	19	33	39	57	66
Rodney District	4	3	5	3	4	4	5
Rotorua District	9	16	8	12	21	15	14
Ruapehu District	26	23	12	15	128	103	133
Selwyn District	1	1	5	4	4	6	4
South Taranaki District	3	1	6	1	2	2	4
South Waikato District	6	1	1	3	5	3	1
South Wairarapa District	14	4	10	19	15	11	18
Southland District	17	54	54	96	271	239	234
Stratford District	4	3	3	8	7	11	6
Tararua District	97	98	88	99	141	112	111
Tasman District	8	21	19	26	28	26	27
Taupo District	19	18	16	26	61	67	109
Tauranga City	9	8	9	16	10	17	21
Thames-Coromandel District	1	0	0	0	1	5	6
Timaru District	5	8	8	9	9	13	14
Upper Hutt City	7	9	10	13	10	6	5
Waikato District	10	27	32	50	37	21	27
Waimakariri District	3	5	4	3	3	3	4
Waimate District	0	0	1	2	1	1	3
Waipā District	2	2	2	3	2	2	3
Wairoa District	1	11	16	11	21	12	11
Waitākere City	61	50	62	75	119	131	82
Waitaki District	0	0	1	2	2	3	8
Waitomo District	0	1	0	0	0	2	2
Wellington City	75	85	75	75	65	81	86
Western Bay of Plenty District	18	24	16	21	24	14	19
Westland District	14	10	27	24	26	44	47
Whakatāne District	17	6	11	7	55	31	55
Whanganui District	15	15	16	16	26	19	15
Whangārei District	22	44	31	44	59	57	33

Source: Tertiary Education Commission data

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