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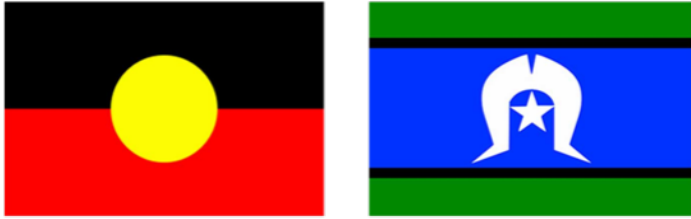
OUTDOOR EDUCATION INNOVATION HUB RESEARCH REPORT

Re-Imagining Workforce Development in the
Outdoor Industry for a Sustainable Future

Prepared by: School for the Visitor Economy

Final Report May 2024

Acknowledgement of Country



Victoria University acknowledges, recognises and respects the Ancestors, Elders and families of the Bunurong/Boonwurrung, Wadawurrung and Wurundjeri/Woiwurrung of the Kulin who are the traditional owners of University land in Victoria, the Gadigal and Guring-gai of the Eora Nation who are the traditional owners of University land in Sydney, and the Yulara/YUgarapul people and Turrbal people living in Meanjin (Brisbane).



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Acronyms

AAAS	Australian Adventure Activity Standard
AABAT	Australian Association of Bush Adventure Therapy
ABS	Australian Bureau of Statistics
ACARA	Australian Curriculum, Assessment and Reporting Authority
AGSM	Activity Group Skill Micro-credential
ANZSIC	Australian and New Zealand Standard Industrial Classification
ANZCO	Australian and New Zealand Standard Classification of Occupations
ATIC	Australian Tourism Industry Council
AQF	Australian Qualifications Framework
CALD	Culturally and Linguistically Diverse
D&I	Diversity and inclusion
HE	Higher Education
LGA	Local Government Area
LLEN	Local Learning and Employment Networks
NTP	National Training Package
OE	Outdoor Education
OEA	Outdoor Education Australia
OEG	Outdoor Education Group
OEIH	Outdoor Education Innovation Hub
OV	Outdoors Victoria
PAR	Participatory Action Research
RPL	Recognition of Prior Learning
VCE	Victorian Certificate of Education
VE	Vocational Education
VU	Victoria University
WTIF	Workforce and Training Innovation Fund

Definitions

Micro business: Business with less than 5 employees

Small business: Business with 5-19 employees

Medium business: Business with 20-199 employees

Large business: Business with more than 199 employees

Executive summary

This report presents the findings and recommendations from research undertaken for the project 'Re-Imagining workforce development in the outdoor industry for a sustainable future' investigating skills and labour issues for the industry and supported by the Victorian Government Workforce and Training Innovation Fund (WTIF). The research was conducted by Victoria University's School for the Visitor Economy (SVE) in collaboration with Box Hill Institute, the Outdoor Education Group (OEG) and the Outdoor Education Innovation Hub (OEIH) Industry Partner Group, which consists of outdoor education companies, volunteer organisations, industry associations, government officers and education institutions.

The larger project encompasses broad objectives around supporting the recovery, transformation and sustainability of the outdoor industry in Victoria through industry-lead, student-centred, and future-focused education training and research. The objectives of the research component of the project include:

- To determine the needs, preferences and priorities of prospective and aspiring employees.
- To investigate the ongoing professional development requirements of future talent to meet the medium and longer-term needs of the evolving outdoor business environment

The research is industry-informed and applied a Participatory Action Research (PAR) approach, which seeks to situate power within the research process with those who are most affected by a program. The participatory nature of PAR refers to the active involvement of stakeholders, such as practitioners, students and program managers. During a series of workshops, the research participants in this study were engaged in research design processes, strategising and proposing solutions to inform and endorse the recommendations for industry practices to meet the medium and longer-term needs of the evolving outdoor business environment. Using a mixed-methods approach, the research and analysis of survey data (n = 297 respondents) and rich qualitative data (n = 40 interviewees; 25 focus group participants) allowed for a holistic investigation of the outdoor education industry, as well as a deeper insight into the diverse experiences and perceptions of industry stakeholders (i.e., employers, employees, educators and students), including outdoor industry companies, volunteer organisations, industry associations and education institutions.

This report presents pressing and interrelated issues that require both immediate actions and long-term strategic planning to meet the medium- and longer-term needs of the evolving outdoor business environment. The key findings are encapsulated by the following themes:

- Acute skills and labour shortages and staff attraction and retention issues
- An unclear industry image and identity linked to a lack of exposure, data and strategy
- Barriers to diversity, inclusion and accessibility in the workforce and workplaces
- Increasing industry professionalisation, staff training and development

The study found that people who are employed, volunteer or aspire to be employed in the outdoor industry are mostly young, highly motivated, and passionate about the outdoors. Key motivators to join and stay in the industry are meaningful work and job content, the latter including interesting work and autonomy; yet employers are concerned about how they will attract and retain staff. There appears to be a considerable gap between the types of roles that aspiring employees seek and the types of roles in which outdoor industry staff are employed. This indicates that there is a mismatch between the types of job opportunities that are sought by people who are considering work or a career in the industry, and those that are on offer by industry, which may cause prospective employees to look elsewhere. There is a diversity of opinion on how to solve the workforce problems, but pay, working hours and conditions were identified as key issues of concern for employers, employees, volunteers, and aspiring employees alike.

Diversity, inclusion and accessibility emerged as critical issues in the outdoor workforce, which is predominantly white and male dominated, particularly in management. While it is acknowledged that more outdoor industry employers and organisations are moving towards supporting greater diversity and inclusion in the industry, the working conditions and discriminatory work cultures, (unconscious) gender bias and sexist attitudes create a range of challenges and barriers for employees and potential candidates, especially people with diverse backgrounds, which help to explain why they might not consider the industry as a career choice and/or decide to leave the industry. Further strategies need to be actioned to strengthen the industry's diversity, inclusion, and accessibility; proposed approaches ranged from the individual and organisational levels to industry and system-wide framework changes. Together, these actions and more collaborative efforts between industry stakeholders could help combat the challenges and barriers for minority groups working in outdoor education or seeking to advance their career in the profession.

Increasing professionalisation is seen as a key means of moving the industry forward. Approaches to achieving and demonstrating professionalisation in the outdoor industry, however, are contentious. Some stakeholders support self-regulation, while others seek to mandate standards. Regardless of the approach, more alignment, mapping and compliance work is needed to address education and training pathways and minimum qualifications, which need to be more clearly defined. Employers require or prefer employees to have certain qualifications due to safety and standards factors, in addition to compliance reasons to meet requirements for government, insurance policies and land managers. There is a lack of consistency, however, around how employers implement these requirements. There is also an apparent disconnect between outdoor industry graduates' readiness and the skills and knowledge required in the field (i.e., TAFE graduates lack critical thinking and facilitation skills and knowledge of educational theories, whereas university graduates' evidence of their competency to perform skillsets may not fit the compliance structures required by industry).

A key finding that has the potential to undermine industry efforts, is that the outdoor industry does not have a distinct identity with clear boundaries. The defining characteristics of the industry are contested due to the widely diverse forms of activity, settings and roles (e.g., educators, teachers, guides, tourism operators etc.) and purposes (e.g. profit, education,

recreation, welfare, health etc.), reinforced by a lack of workforce data and full and accurate representation in official statistics, for example, the Australian Bureau of Statistics (ABS), Australian and New Zealand Standard Industrial Classification (ANZSIC), and Australian and New Zealand Standard Classification of Occupations (ANZCO). Together, this has contributed to a problematic public image (i.e., low status), poor awareness and understanding of the industry and its job and career opportunities, which are central for recruiting and retaining skilled professionals and relieving labour supply issues. Essentially, the value of the industry is not captured and therefore cannot be articulated, despite the apparent social, economic and environmental benefits of being in nature and the outdoors, leading to a limited capacity for industry advocacy.

Limited access and exposure to the outdoors at a young age emerged as another critical finding that has implications for the ways in which society perceives the outdoor industry and potential interest in outdoor jobs and careers stemming from positive childhood experiences. Children from CALD communities and lower socio-economic families and schools were thought to be most impacted due to a range of socio-cultural and economic factors. These include parental attitudes, perceptions of the outdoors as unsafe, the perceived low status of outdoor jobs, as well as cost to schools and families to run and attend school camps.

Key recommendations relating to the industry's workforce and skills development are summarised as follows:

Action area 1: Industry image & identity	Action area 2: Staff attraction & retention
<p>Objective: To improve the image of the outdoor industry as an employer of choice, connect stakeholders, collect data and communicate the outdoor industry's socio-economic value</p> <ul style="list-style-type: none"> ▪ Support access and exposure to outdoors for young people, especially children from CALD and low socio-economic families/schools (e.g., formal inclusion of outdoor education in F-10 curriculum) ▪ Increase exposure and engagement with diverse communities to enhance awareness of the industry, jobs, careers and pathways (e.g., through schools, TAFEs, universities, jobs and fair expos, media, learning networks) ▪ Actively recruit through both industry networks and mainstream online employment platforms like Seek; develop and maintain an online 'Outdoor Industry Job Board' ▪ Investigate comparable models of industry development (e.g., tourism, care and 	<p>Objective: To raise employment standards and increase business capacity to access a skilled and stable workforce pipeline</p> <ul style="list-style-type: none"> ▪ Implement and communicate a total reward management strategy ▪ Undertake work analysis & job design processes to craft jobs that are mutually beneficial for employers & employees ▪ Provide professional development for employers & employees (both permanent & casual); enhance strategic HRM skills through internal & external resources (e.g., Australian Human Resource Institute) ▪ Review industry awards & working conditions (e.g., assess comparative industries, define different business requirements, explore industry-wide bargaining agreements) ▪ Balance staffing flexibility & job continuity (e.g., through job rotation, cross-skilling, job sharing)

emergency professions) to inform future strategies

- Build a consensus of industry identity through consultative workshops; outcomes can inform an industry-wide repositioning/rebrand
- Gather and share outdoor industry data (e.g., through building a digital data warehouse and dashboard); leverage insights to inform industry/business strategies and commentate the value of the industry to attract support, investment and funding
- Conduct further research (e.g., economic modelling, attitudinal analysis, impact analysis)

- Employ recruitment metrics to track & optimise hiring process & success where possible

Action area 3: Diversity, inclusion & accessibility

Objective: To foster inclusive, safe and supportive workplaces, a diversified workforce and employee wellbeing

- Build a shared and comprehensive understanding of diversity
- Diversity leadership by nominating leaders with diverse backgrounds to join industry boards
- Diversity messages in the industry by including more diverse representation in marketing and communications
- Support course scholarships to increase access for students from minority groups and lower socio-economic backgrounds
- Educate management and staff by providing diversity and inclusion training and workplace policies
- Protect staff by developing and implementing codes of conduct for both colleagues and clients
- Enhance physical accessibility of workplaces (e.g., through applying for grants, liaising with Parks Victoria, explore Universal Design for Learning)

Action area 4: Professionalisation, staff development and training

Objective: To strengthen internal and external collaboration, define clear pathways and develop a coordinated strategy for a sustainable and skilled workforce

- Continue and increase industry collaboration, internally and externally, including engagements with education providers
- Strengthen national peak body to advocate and support congruence across states and territories and develop national strategy
- Collaborate across industry associations in other sectors (e.g., VTIC, ATIC, AABAT) to explore mutual benefits
- Vocational and higher education providers to explore how to support students' competency-based and soft skills
- Enhance seamless education pathways and continuity through building a bridge between vocational and higher education sectors (e.g., AQF levels 1 to 10)
- Build cases for the inclusion of outdoor industry courses in government support schemes (e.g., Fee Free TAFE, Skills First and Training Needs List)
- Review of the Australian Adventure Activity Standard and consider revisions

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| <ul style="list-style-type: none"> ▪ Continue to develop and promote toolkits/resources in consultation with experts to support businesses to be more inclusive ▪ Continue to develop and deliver programs designed to engage more diverse groups in the outdoors ▪ Further research investigating how to best promote diversity, inclusion and accessibility in the outdoor industry | <p>and additions (e.g., include Mental Health First Aid; equivalent qualifications for minimum standards; requalification requirements; translation of university graduates' capacity)</p> <ul style="list-style-type: none"> ▪ Strengthen industry-informed training and education pathways; explore opportunities for new and existing educational offerings (e.g., Master of Outdoor Therapy) ▪ Engage in strategy development to build a strong strategic plan with shared goals, vision and mission for the outdoor industry ▪ Explore similar industries professional structures for frameworks that would support the outdoor industry (e.g., professional associations, unions, accreditation requirements) ▪ Further evaluation of OEIH AGSM courses long-term impact |
|--|--|

The above summary of the research findings and recommendations highlights that extensive industry collaboration and a systems thinking approach is needed to address a range of complex and interrelated issues. This report and the outcomes of this study underscore the need for outdoor industry stakeholders, including industry associations and peak bodies, employers, operators, government (local, state and federal) and other interested parties to collaborate productively to reimagine the outdoor industry to leverage its future potential and support sustainable workforce development, stakeholder wellbeing and industry resilience.

Contents

Acknowledgement of Country	2
Acronyms	4
Definitions	5
Executive summary	6
1.0 Introduction	13
1.1 Background	14
Industry value & professionalisation	15
Knowledge, skills & qualifications	17
Working conditions & employee work-related stress	18
Diversity & inclusion	18
Impacts of COVID-19, risk & resilience in outdoor education	19
Summary	19
2.0 Research methods and design	20
Methodology	20
Data collection methods	20
Limitations	22
3.0 Survey findings	23
3.1 Demographics & industry profile	23
Age, gender & identity	23
Professional & educational status and background	26
Business characteristics	33
3.2 Workforce attraction & retention	35
Labour & skills shortages	35
Barriers to entry/stay	37
Reasons and motivations to join and stay in the industry	39
3.3 Staff training and development	42
Career pathways and aspirations	42
Work readiness of graduates	44
Employers' opinions on training	44
Training & professional development provisions	45
3.4 Perceptions of the industry	47
3.5 Survey findings summary	51
4.0 Interview findings	52
4.1 Industry image, awareness & identity	52

Industry image	52
Industry awareness	54
Industry identity, collaboration & leadership	55
4.2 Staff attraction & retention	58
Demanding work & burnout	59
Casualisation & job security	61
Career progression	63
Awards & remuneration	64
4.3 Diversity, inclusion & accessibility	68
Women	70
LGBTQIA+ community	71
Body diverse people	72
People with disability	72
First Nations people	73
Diverse, inclusive & accessible practices	76
4.4 Professionalisation, training & development	78
Risk management, safety & standards	79
Education & training pathways	80
4.5 Interview findings summary	84
5.0 Conclusion	87
Contribution to knowledge and research gaps	88
6.0 Implementation plan & recommendations	90
6.1 Action area: Industry image & identity	90
6.2 Action area: Staff attraction & retention	93
6.3 Action area: Diversity, inclusion & accessibility	95
6.4 Action area: Professionalisation, training & development	97
7.0 References	100
8.0 Appendices	104
Appendix A: Statistical analysis	104
Appendix B: Tables	106
Appendix C: Interviewee attributes	118

1.0 Introduction

The rapid growth of the outdoor industry over the past decade has been a major catalyst for increasing structure and professionalisation in the industry state-wide and nationally. This is driven by increasing awareness of the value of outdoor experiences as a medium for important learning and wellbeing outcomes. The increasing demand for services, however, now outweighs the industry's capacity to deliver largely due to challenges related to skills and labour supply, recruitment and retention. These issues are long-standing but have been exacerbated by the many impacts of the COVID-19 pandemic. Within this context, the Outdoor Education Innovation Hub (OEIH) project, entitled 'Re-Imagining workforce development in the outdoor industry for a sustainable future', was funded by the Victorian Government Workforce and Training Innovation Fund (WTIF) to support the recovery, transformation, and sustainability of the outdoor industry in Victoria through industry-lead, student-centred, and future-focused education training and research.

The OEIH project is managed by the OEIH Working Group, which is convened by the Outdoor Education Group (OEG) in partnership with Box Hill Institute and Victoria University (VU), in collaboration with the OEIH Industry Partner Group (comprised of outdoor education companies, volunteer organisations, industry associations, government officers and education institutions). VU's School for the Visitor Economy (SVE) was contracted to deliver the research and evaluation components of the project.

This report presents the findings and recommendations from research undertaken for OEIH to investigate the skills and labour issues in the outdoor industry. The objectives of the research piece drawn from the WTIF Project Application document and addressed in this report are outlined as follows:

- Determine the needs, preferences, and priorities of prospective and aspiring employees.
- Investigate the ongoing professional development requirements of future talent to meet the medium- and longer-term needs of the evolving outdoor business environment.

The research was undertaken from August 2022 to April 2024 with ethics approval granted on 13 March 2023 by the VU Human Research Committee. This report is presented in six key sections: (1) an introduction and background section contains a review of literature and secondary data; (2) an outline of the research design and methods of primary data collection and analysis; (3-4) two separate sections present and discuss the research findings from surveys and interviews respectively; (5) a conclusion that summarises the report and key findings; and (6) an implementation plan with four action areas containing recommendations for strategies going forward. Appended to the report is statistical analysis, data tables and research participant attributes. A list of the references cited in the report is also provided at the end of the report.

1.1 Background

The following section provides an overview and summary of both the academic literature, technical reports and secondary data relating to the outdoor industry and outdoor education with the objective to provide an overview of key issues impacting on the industry and its future workforce development. Parts of this section are a synopsis of a larger literature review and reports produced to inform the research component of the broader OEIH project.

Perhaps a central issue for the outdoor industry is that the defining characteristics are contested. Despite a long and rich history as a type of learning and experience (Yildiz, 2022), there is no universal definition of the industry. One of the key points of difference is the extent to which the industry can be defined as 'outdoor education' or as an 'outdoor industry'. This contention arises due to the widely diverse forms of activity (e.g., natural science activities, high risk adventure activities, self-development etc.), the diverse settings that the industry encompasses (e.g. urban parks, residential camps, wilderness areas, etc.), the wide diversity of people who deliver outdoor education and/or services (e.g. teachers, biologists, tourism operators etc.), as well as the diverse purposes of the activity itself (e.g. for profit, education, recreation, welfare, health etc.) (Cox, 2023).

Numerous definitions are applied to the industry with emphasis on the purpose being multidisciplinary education and the setting being outdoors (Donaldson & Donaldson, 1958: 17; Council on Outdoor Education 1989: 31; Priest, 1986: 13). Other definitions have evolved that have a wider remit recognising the role of outdoor activity, education and enterprise as being part of the wider visitor economy. For the purpose of this research, inclusive definitions of the outdoor industry and outdoor education have been used as provided by OEIH (see below) and the WTIF Project Application document that positions the outdoor education and camps industry as “part of the wider outdoor sector within the visitor economy”.

“Outdoor education provides educational experiences that take place in natural environments, such as parks, forests, beaches, and camping grounds. The main goal of outdoor education is to provide students with hands-on learning opportunities in a unique setting, away from traditional classrooms. Outdoor education can take many forms, including camping trips, hiking expeditions, environmental studies, and outdoor adventure activities. By participating in outdoor education, students are able to develop their problem-solving and teamwork skills, as well as gain a deeper appreciation and understanding of the natural world. Additionally, outdoor education can help to improve physical health, mental well-being, and overall confidence. Overall, outdoor education is a valuable and enriching experience that can have a positive impact on students’ mental health, personal and academic growth.” Outdoor Education Innovation Hub, 2023

These definitions allow for a holistic overview of issues relating to the outdoor industry and outdoor education workforce development and are supported by the literature, which identifies four key sub-sectors within the outdoor industry, namely: (1) outdoor education, (2) outdoor recreation, (3) outdoor therapy, and (4) commercial aspects, such as tour operators

and the retail sector (Mann, 2003; Martin, 1999; Priest & Gass, 1997). As such, the following definition is used: **the Outdoor Industry is inclusive of any provision of outdoor experiences facilitated by an outdoor leader, such as in school-based settings (outdoor education), recreational settings (outdoor recreation), tourism settings (outdoor nature-based tourism), adventure experiences (outdoor adventure) and therapeutic experiences (adventure and nature-based therapy) (Cox, 2022).**

Industry value & professionalisation

Estimates of the value of the outdoor recreation sector are that it accounts for \$11 billion GDP and employs up to 30,000 people representing around 0.3% of all Australian employment (Marsden Jacob Associates, 2018). However, these figures are not fully reflective of the broader outdoor industry beyond the outdoor recreation sector and likely under-estimate the actual number of jobs given that many outdoor industry positions are within other sectors, such as the care industries. Sports and recreation jobs represent an increasingly important sub-component within the care industries alongside of aged care and disability services, children's education and care and health and human services. Various jobs could be classified as outdoor education (e.g., outdoor recreation leaders, lifeguards, sports coaches etc.). However, because they are undertaken within settings such as disability care services, they are classified under the ANZCO category 'Welfare, recreation and community arts worker'. Similarly, outdoor industry employment is likely to be part of the tourism workforce within the ANZIC jobs categories of 'sport and recreation services' and 'education and training'. **Much of the economic value of the industry is therefore disguised due to relevant jobs being dispersed and classified as belonging to industries where the primary focus is not on the outdoors.** The value of the industry is also diluted by inconsistent and/or unclear definitions of the outdoor industry. Projects are being undertaken by outdoor industry peak bodies, including work to measure the size and scope of the industry at state-levels, however, issues may emerge if the approaches and methods are inconsistent and may be incompatible.

A further issue is that the value of the industry is much greater than simply economic and there is some research undertaken to capture this value. For example, Williams and Allen (2012) identified that a very large proportion of young people participate in outdoor programs and report a range of social and personal development benefits from their participation. Thomas (2001) also recognised the range and scope of outdoor programs for education, adventure, corporate training and therapy. **There is little recent research, however, that attempts to capture the full social, economic and environmental value of the outdoor industry** and there are increasing calls from industry stakeholders for a better understanding of the role, impacts and benefits of outdoor education for future generations (National Outdoor Education Conference, 2022).

At a state level, reports show that Victoria's nature-based outdoor activity sector is a large part of the Victorian economy, with \$7.4 billion spent each year on nature-based outdoor activities and equipment (Marsden Jacob Associates, 2016). This expenditure contributes \$6.2 billion to Victoria's economy and supports around 71,000 direct and indirect full-time equivalent jobs. More recent research by Outdoors Victoria (2021) presents regional

economic impact figures focussed on the nature-based outdoor economy for camps and outdoor education sub-sectors:

- 5,425 employees
- 240 employers
- 2,400 volunteers
- 2 million participants
- \$374 million annual turnover
- \$134 million contribution to regional economy

A critical issue, however, is that demand for services is outpacing labour supply. As illustrated in the WTIF Project Application, the Outdoor Education Group (OEG), one of the largest providers of outdoor education programs for school students in Australia, grew by 10% per annum in the 5 years prior to 2020. This growth, combined with the impacts of COVID-19, has resulted in significant labour and skills shortages. This shortage has been similarly experienced across most industry sectors; yet while labour supply issues are easing at a national level for the tourism, hospitality and events sectors, partly due to the return of temporary workers following COVID-19 (TRA, 2023), the shortages remain acute within the outdoor industry.

Issues related to the value of outdoor education extend to the academic standing of the field and its perceived low status as both a profession and industry. **Scholars and industry practitioners argue that outdoor education is often undervalued, stigmatised, and misunderstood by various internal and external stakeholders, including teachers, administrators, parents and policy makers** (Dyment & Potter, 2015; Parker, 2013; Potter & Dyment, 2016). Regarding the latter, the undervaluing of outdoor education has been seen in its exclusion as a subject and learning process from the documents and policy that informed the development of a new National Curriculum in Australia (Gray & Martin, 2012).

From an industry and training perspective, a strong discourse surrounds the importance of accreditation for outdoor education (Hobbs, et al., 2018; Marchand, et al., 2019). As explained by Marchand et al. (2019: 352), “credentialing can signal a unified profession that agrees on the professional competencies required for effective professional practice”. It is argued that until collective agreement on the minimum qualifications and expectations for outdoor leadership education is achieved, the professional status of outdoor educators, leaders and managers will continue to be questioned, both from within and outside the industry (Hobbs, et al., 2018). At present, there is no accreditation or governing body in Australia’s higher education (HE) system to recognise the professional role of outdoor educators, nor guidelines for outdoor leaders regarding the knowledge and skills required for outdoor leadership (Polley, 2021). There are, however, core competencies and training pathways that are nationally recognised and articulation is possible from the vocational training package into undergraduate study (Dickson & Herbert, 2005). **Overall, the low value and low status attributed to the industry is a key problem for attracting and retaining skilled professionals and relieving labour supply issues.**

Analysis of secondary data undertaken by SVE researchers for the OEIH project reinforces the limited local talent pool. Within Victoria, there are currently four TAFEs, three universities and one privately operated training institution that provide qualifications specific to the outdoor industry. On average, these Victorian education institutes collectively provide around 245-290 graduates per year, which may represent a bottleneck effect for appropriately trained employees that meet industry needs in terms of the minimum qualification standards. From a school system perspective, there are 598 secondary or combined primary and secondary schools in the state of Victoria listed on the ACARA (Australian Curriculum, Assessment and Reporting Authority) website in August 2023, and only around one third (n = 211) offer VCE Outdoor and Environmental Studies. While there have been longstanding calls for the inclusion of a formal outdoor education curriculum in Victoria, only the senior years' curriculum (i.e., VCE) include Outdoor and Environmental Studies explicitly (Ambrosy & Allen-Craig, 2023). Using the data from ACARA, further examination of the schools' sector, region and socio-economic status highlighted that **outdoor education is less accessible for low socio-economic status school students**. Of the 211 schools that offer VCE Outdoor and Environmental Studies, 21% were categorised as low socio-economic status schools, in comparison to 76% that were mid and high socio-economic status schools. More research is needed to determine if this low level of exposure to the outdoor industry at a young age in school also contributes to the skills and labour shortages experienced by the industry.

Knowledge, skills & qualifications

There are gaps within the literature regarding the knowledge and skills, and the role of practical experience, required of outdoor education leaders (Marsden, et al., 2012). With specific regard to the HE sector in Victoria, **there appears to be a disconnect between outdoor education leadership graduate preparation and the practical experience required in the field** (Marsden, et al., 2012), as well as employer concerns about inconsistencies between graduates' capabilities and inaccurate perceptions of graduate's personal skill levels (Munge, 2009).

Academics have also recognised a lack of clarity about the knowledge, skillsets and experience of university outdoor education graduates (Thomas, et al., 2021). In comparison, the vocational education and training (VET) sector in Australia has a much clearer curriculum and well-defined assessment processes, achieved through a National Training Package (NTP). The development of threshold concepts in the university sector have been used in an attempt to combat the uncertainty about university graduates' knowledge, skills and experience levels (Thomas, et al., 2021). In the school sector, a set of qualification guidelines for teachers of outdoor education in schools was drafted by the Victorian Outdoor Education Association in 2004/5 that outline the disciplinary knowledge and skill areas required of outdoor education teachers (Martin, 2008) and Outdoor Education Australia (OEA, 2024) has developed guidelines for schools and tertiary institutions with recommended standards for professional outdoor education teachers. There is little recent research, however, on the skills and qualifications of outdoor educators. While it appears that more employees in the outdoor education workforce have qualifications in outdoor specific courses (e.g., Bachelor of Outdoor Leadership), the most recent studies are now very dated and primarily confined to the secondary school sector. **Research is required to**

gain more representative insights into the qualifications of outdoor educators in the current workforce, encompassing those working in outdoor education outside the school system.

Working conditions & employee work-related stress

While there is paucity of research on the experiences and career development of outdoor educators and leaders (Lewis & Kimiecik, 2018), notable exceptions exist. Key themes include the high risk of burnout (Lewis & Kimiecik, 2018; Gunn, 2006), poor working conditions (Thomas, 2001), and relatively low pay for hours worked (National Outdoor Education Conference, 2022). Due to the nature of work requiring considerable time away from home, one of the known flow-on effects is an inability to maintain relationships (Thomas 2001). Another factor that may contribute to employee work-related stress and burnout is the high-level of risk management required to be undertaken by outdoor educators and leaders in terms of managing the mental and physical health and safety of participants (Dallat, 2009). **More research is needed to determine how this impacts those working in the industry and if this is an influencing factor for prospective employees considering work as an outdoor educator.**

Diversity & inclusion

The literature collectively calls for the need for greater diversity and inclusion in the industry (Loeffler, 2021; Roberts, 2018; Rogers, et al., 2019). Various studies show that outdoor education is predominantly accessed and led by a white male population, which is often reflected in the sample of research participants (Rogers et al., 2019). This exposes a need for further research that examines diversity and inclusion issues in the outdoor industry from the perspectives of under-represented populations. Studies of diversity and inclusion in Australian outdoor education programs also appear limited and **there is much opportunity to further explore the diversity and inclusion practices in outdoor education in Australia**, especially as diverse populations increasingly access the outdoors for its range of benefits, including mental health and wellbeing (Rose et al., 2018). While studies have found that outdoor educators personally place a high value on diversity and inclusion, there is a lack of awareness around how to implement diversity and inclusion practices, especially in terms of recruiting, empowering, supporting and retaining people from diverse backgrounds (Rogers et al, 2019). **The need for leadership and workforce training on diversity management and workplace inclusion is therefore apparent from this study.**

A considerable body of literature exists in the outdoor education literature on gendered experiences. Outdoor education is described as a male-dominated industry and a number of studies have highlighted how this impacts the inclusion and experiences of women working in the field (see: Gray, 2016; Gray, Allen-Craig & Carpenter, 2007; Wright & Gray, 2013). **Collectively, the literature offers suggestions for building a more inclusive outdoor education industry in terms of gender equity and inclusivity.** Strategies include the need for affirmative action measures, female-only programs, greater promotion of female role models and mentors and actions that expose and challenge practices that serve to marginalise women and reinforce male privilege (Allin, 2004; Allen-Craig et al., 2020; Gray, 2016).

While a number of important studies have examined the value of First Nations principles and practice for the outdoor industry and students' learning outcomes (see: Spillman, 2017; Stewart, 2004; Gordon & Spillman, 2021), **an apparent gap in the research emerges regarding a lack of Indigenous voices in terms of their perceptions and experience of the outdoor education industry, both as students and professionals.**

Impacts of COVID-19, risk & resilience in outdoor education

An increasing theme in the wider tourism literature is the need for a greater focus on risk management and building resilience given the industry's inherent reliance on nature-based assets and vulnerability to natural disasters and other shocks. This has been brought into sharp focus during and after the emergency phase of the COVID-19 pandemic. However, despite the devastating impacts on the outdoor industry, there is little empirical evidence of this in Australia. Evidence from other countries, however, provides useful insights. For example, in Britain, it was estimated that the outdoor industry lost income of approximately AUD\$490 million. Extensive business closures and the loss of approximately 25% of jobs were also documented in the industry (Institute of Outdoor Learning, 2020). Similarly, the related tourism industry workforce was decreased by 60% over the course of 2020 and 2021 (TRA, 2023). The pandemic did, however, prompt industry discussions to learn about impacts from other countries and to plan strategies for surviving and building resilience into the future (Quay et al., 2020). Key strategies for Australia included the need to adopt strategies to prevent disease transmission, to embrace adaptation strategies such as the development of online learning resources and to develop longer term improvement strategies to build resilience to future events (Priest, 2022). This failure to capture the real impacts is reflective of the deeper issue related to the lack of a clear definition of the industry and limited capacity to advocate on its own behalf. Further, **given the likelihood of future shocks that will occur at greater frequency and intensity, there is a need for industry development strategies focussed on building industry resilience.** As highlighted by related literature, sustainable workforce management is a key element of industry resilience (Gamage et al., 2023).

Summary

Overall, there is not a large body of literature relating directly to workforce sustainability in the outdoor industry, however, there are some explanations for why skilled labour supply is an ongoing problem and where the gaps are in terms of research and development. A key issue is the lack of a clear definition of the industry and that workforce data is poorly captured by official statistics. This contributes to a poor public understanding of the industry and the extent to which there are career opportunities. The industry is widely viewed as having a low status with poor pay and working conditions, despite the considerable social, economic and environmental benefits generated by the industry. These benefits are poorly understood and there is a significant gap in the literature in relation to the extent to which the true value of the industry is measured. A further issue contributing to labour supply include conditions that discourage the attraction and retention of women and people from diverse backgrounds. There is also relatively little research that explores how and why these industry characteristics are sustained. Finally, in the context of climate change, there is little exploration in the literature of building industry capacity to prepare, respond and recover from shocks, such as the COVID-19 pandemic.

2.0 Research methods and design

Methodology

Researchers employed a Participatory Action Research (PAR) approach, which seeks to situate power within the research process with those who are most affected by a program (see: AIFS, 2015; Bergold & Thomas, 2012; Kemmis & McTaggart, 2007; Kindon et al., 2007). The participatory nature of PAR refers to the active involvement of research stakeholders, such as practitioners, students, and program managers. Research participants are engaged in strategising and proposing solutions to inform and endorse program improvements and recommendations for industry practices to meet the medium and longer-term needs of the evolving outdoor business environment. The project employed a mixed-methods research methodology and collected both quantitative and qualitative data to meet the research objectives.

Data collection methods

In the first stage of primary data collection, conducted between March and November 2023, online surveys were designed to provide a holistic investigation of the outdoor industry. The survey and sampling design was in part informed by advice provided by the OEIH Working Group, who have extensive knowledge of their industry and connections to key leaders and networks. Survey respondents were invited to participate using a range of channels, including industry networks, newsletters, social media groups and by email invitation. Researchers also attended seven in-person events, including careers fairs and an open day, where young people and career changers were invited to complete the aspiring employee survey, as well as an industry conference, where people working in the industry were invited to complete the employer and employee surveys.

Three separate questionnaires contained a series of closed and open-ended questions and were designed in consultation with the industry partners to capture data relevant to the respective respondent group. The survey sample was generated using non-random convenience methods and hence is not necessarily representative of the broader populations. While a total of 416 survey responses were generated, 119 incomplete or duplicated responses were excluded from the analysis, resulting in 297 usable responses, distributed across the three groups as follows:

- Employers (n = 41)
- Employees and volunteers (n = 128)
- Aspiring employees (n = 128)

In the second phase of data collection, forty semi-structured interviews were conducted between September 2023 and January 2024 to gain a deeper understanding of the diverse experiences and perceptions of research stakeholders, including:

- Industry experts, employers and managers (n = 13)
- Employees and volunteers (n = 13)
- Aspiring employees (n = 14)

Purposive (or judgemental) sampling was used to select interviewees, which is a non-probability sampling technique that utilises researcher experience, judgement and knowledge to select participants based on a desirable characteristic (Zikmund et al., 2013). Diverse voices were sought by the researchers and interviewees were selected based on their individual experience and unique outlooks and invited to partake in an online interview lasting 30-60 minutes. Interviews were continued until a point of saturation, which is reached when “no new theoretical insights are being gleaned from the data” (Baker & Edwards, 2012: 12).

As shown in Figure 1, three participatory workshops were held throughout the research process. These enabled researchers to actively involve research stakeholders in the research design and validation of research findings. The final workshop involved four focus groups with diverse stakeholders (n = 25), including representatives of outdoor industry companies, volunteer organisations, industry associations and education institutions (i.e., employers, employees, educators and students).

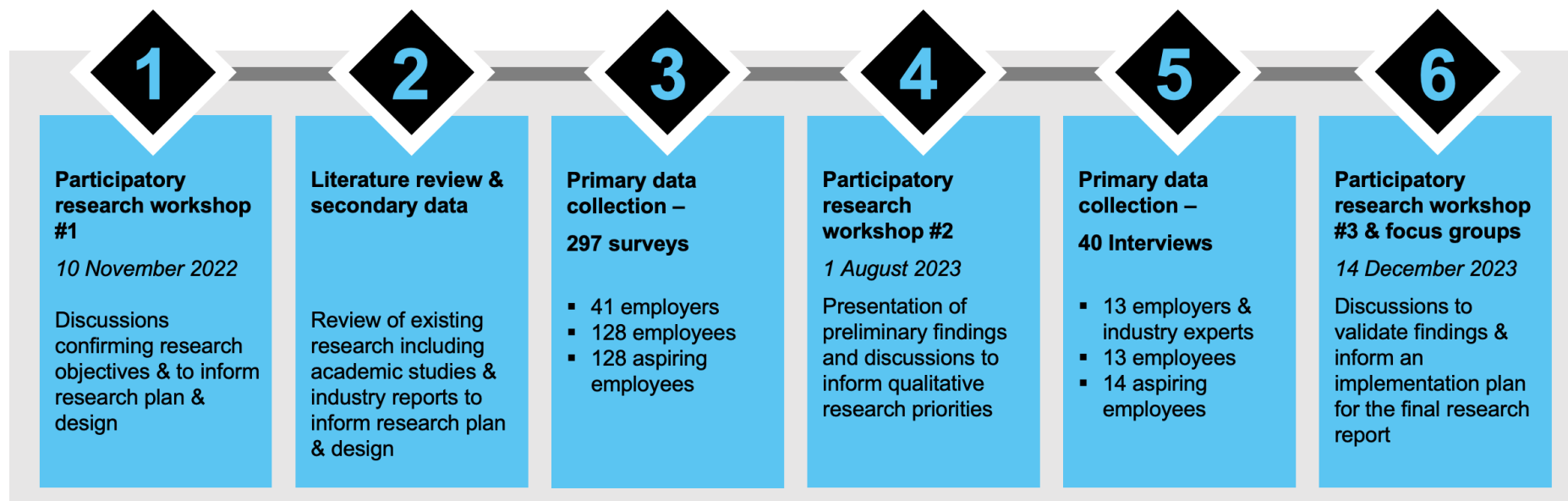


Figure 1 – Research process with data collection phases

The first workshop, held in the initial stages of the project, enabled discussions that confirmed the research objectives and informed the research and evaluation plan and design. The second workshop consisted of a presentation to the OEIH Industry Partner Group with the preliminary survey findings from the quantitative component of the research, which were used as a basis for a discussion informing the qualitative research priorities. The final and third workshop also involved an update of the research progress and subsequent discussion in the form of focus groups to validate the research findings and inform an implementation plan for the final report with recommendations for research stakeholders.

Limitations

Several limitations are noted regarding the research design and methods used in this study. The first relates to the virtual conduct of the project. While remote interviews and focus groups allowed for increased participation from industry stakeholders, it is acknowledged that face-to-face interviews have the potential to enhance rapport between the interviewer and interviewee (Jennings, 2001). This limitation was mitigated through the Participatory Action Research approach taken whereby researchers established relationships and earned stakeholder trust through attendance at fortnightly working group meetings, facilitating industry partner workshops and holding presentations.

Data saturation emerged as another methodological issue. While the repetition of somewhat similar viewpoints was achieved for most themes, certain stakeholder groups were under-represented in the research, namely people living with disability, First Nations and body diverse people. This was attributed to the heterogeneity of the population from which the sample was drawn, and challenges associated with sampling and gaining access to under-represented and hard-to-reach minority groups. The themes concerning these communities are therefore representative of a relatively small group of people only.

Further sampling limitations are acknowledged, whereby the survey sample may not be generalisable to the broader population due to the convenience sampling approach used. A random sampling technique would have required further time and resources that were not available for this research. As such, the conclusions drawn are representative of the research participants only. Another sampling issue arose regarding access to participants in the school system. Researchers completed the Victorian Government Department of Education's ethics process and were granted approval on 14 July 2023 to contact school principals, who were asked to invite outdoor education schoolteachers and their students to participate in the research. A random selection of 50 schools offering VCE outdoor education was generated using representative ratios based on school type (i.e., public, independent, Catholic), socio-economic status, and location. While all were invited to participate in the study by email, only two schools responded. Both required Melbourne Archdiocese Catholic Schools ethics approval, however, the timing did not align with data collection and this further approval was not sought. The overall low response rate is attributed in part to the heavy workload of schools, conditions that did not allow for research incentives to be used, as well as the complicated processes required (i.e., researchers sought consent from principals, who sought consent from teachers, who sought consent from parents to provide the survey link to students). This limitation contributed to the non-participation from aspiring employees directly through schools, however, it was mitigated by accessing school aged young people through data collection taking place at the four careers events.

3.0 Survey findings

This section presents the findings drawn from the analysis of the survey data using Qualtrics and descriptive statistics. Appendix A contains the frequency tables showing the full breakdown of response frequencies and percentages for each sub-section.

3.1 Demographics & industry profile

Age, gender & identity

The people who work or aspire to work in the outdoor industry are relatively young. Of the employees surveyed for this study, 68% were under the age of 35. Similarly, of the aspiring employees, 76% were under the age of 35, although this group skewed lower with most aged 16-17. Many aspiring employees reported that they are still completing school, indicating that **there is an opportunity to engage with secondary school/ VCE students as a promising source of future workforce talent**. In contrast, only 44% of the employers in the industry were under the age of 35. This is shown in Figure 2 below:

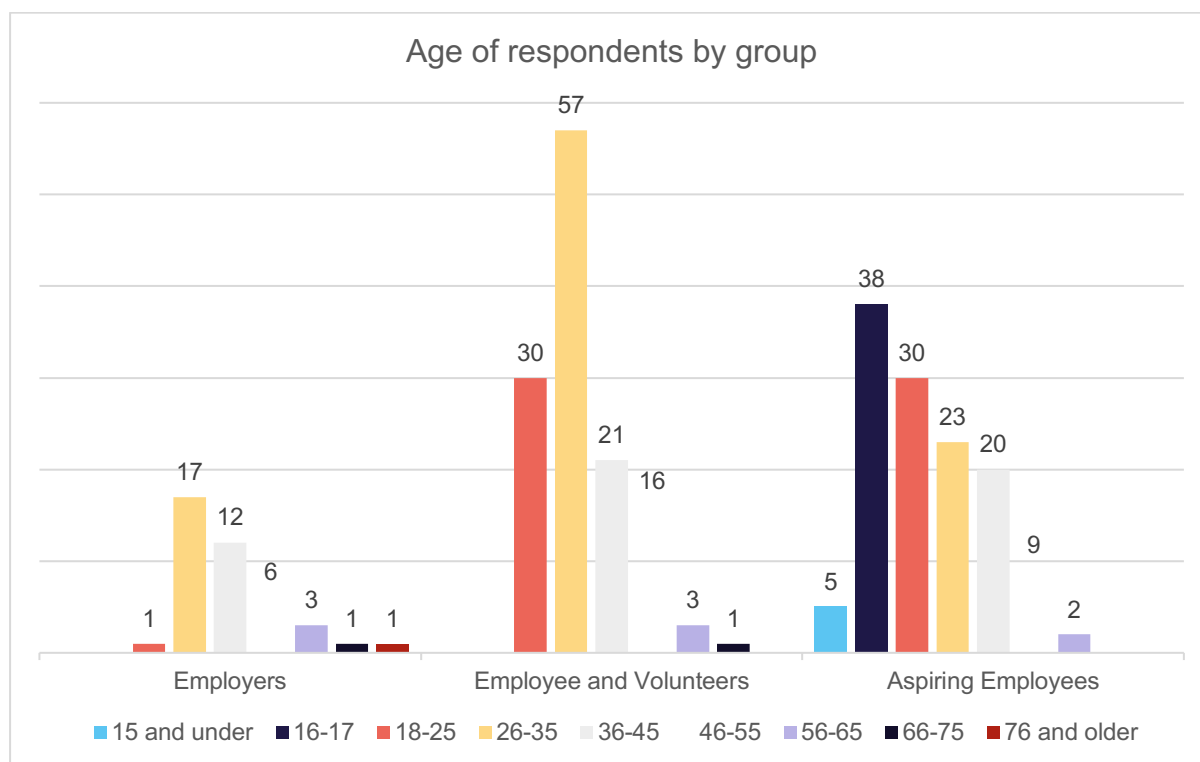


Figure 2 – Age of survey respondents by group

The employer group is largely made up of men (68%), while the employees and volunteers and aspiring employees were more evenly split in gender. Figure 3 below illustrates this finding. Gender imbalances and its effects on the management of companies and career opportunities will be discussed in the interview findings section of this report. This discussion will also include the problems associated with predominately male managers for women and gender diverse people in the workforce.

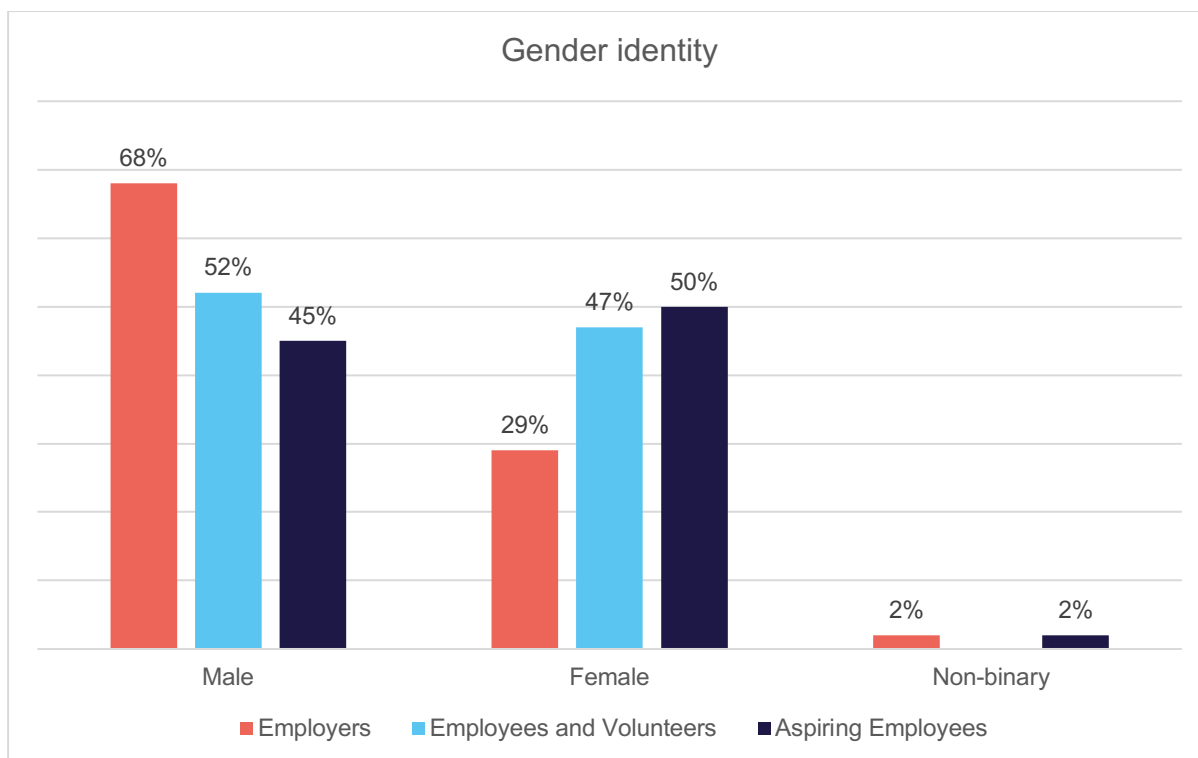


Figure 3 – Gender identity of survey respondents

Figure 4 below represents the percentages of survey respondents who identified as belonging to minority groups in comparison to the Australian average. Samples skewed higher for LGBTQIA+ than the national average in Australia and skewed lower for people with culturally and linguistically diverse (CALD) backgrounds and people with disability.

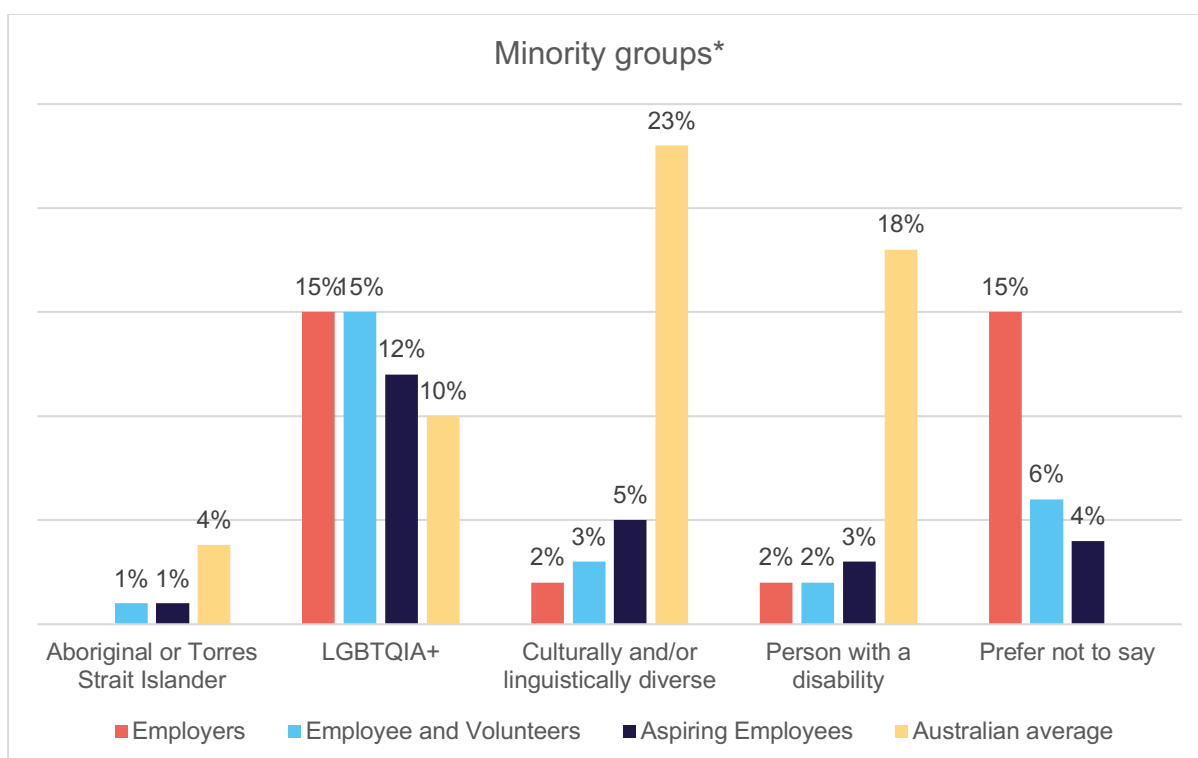


Figure 4 – Minority group identity of survey respondents compared to national average (*respondents could select more than one answer)

The relatively large representation of LGBTQIA+ people in the outdoor industry workforce suggests that organisations and employers should provide management and staff with appropriate training and policies on gender and sexuality diversity to encourage inclusive practices.

The ancestry of the three groups surveyed are shown in Figure 5 below. As can be seen, there was relatively low cultural diversity across all groups in comparison to the broader Australian population with many of the research participants belonging to predominantly white cultures.

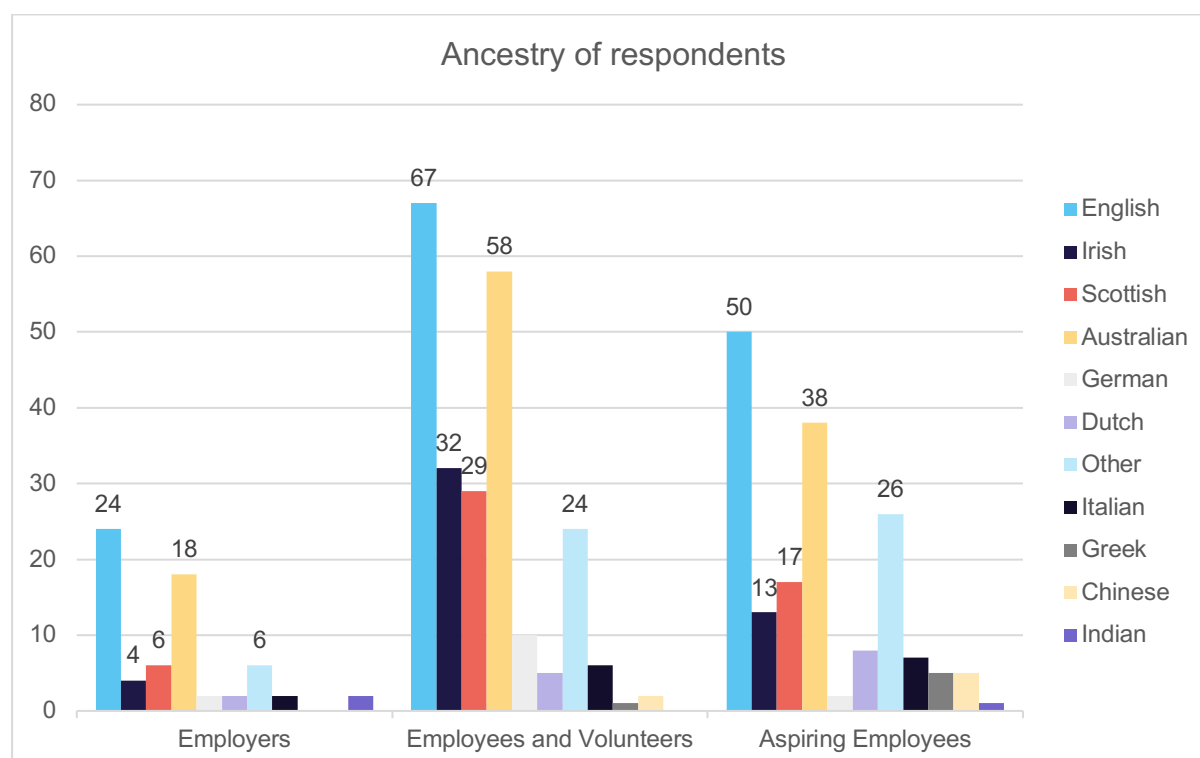


Figure 5 – Ancestry of respondents

Almost all respondents stated that they spoke English at home (100% of employers, 99% of employees and volunteers and 97% of aspiring employees). Findings related to languages spoken at home support the dominance of Anglo-Saxon background respondents. Only 10% of employers, 4% of employees and volunteers and 15% of aspiring employees say that they speak a language other than English at home. The lack of diversity in the industry and its effects on the workforce are discussed more in the interview findings section of this report.

Professional & educational status and background

Figure 6 below describes the role/s that employees and volunteers stated that they worked in, with most classifying themselves as outdoor activity guides/ instructors (n = 57) or outdoor educators (n = 48).

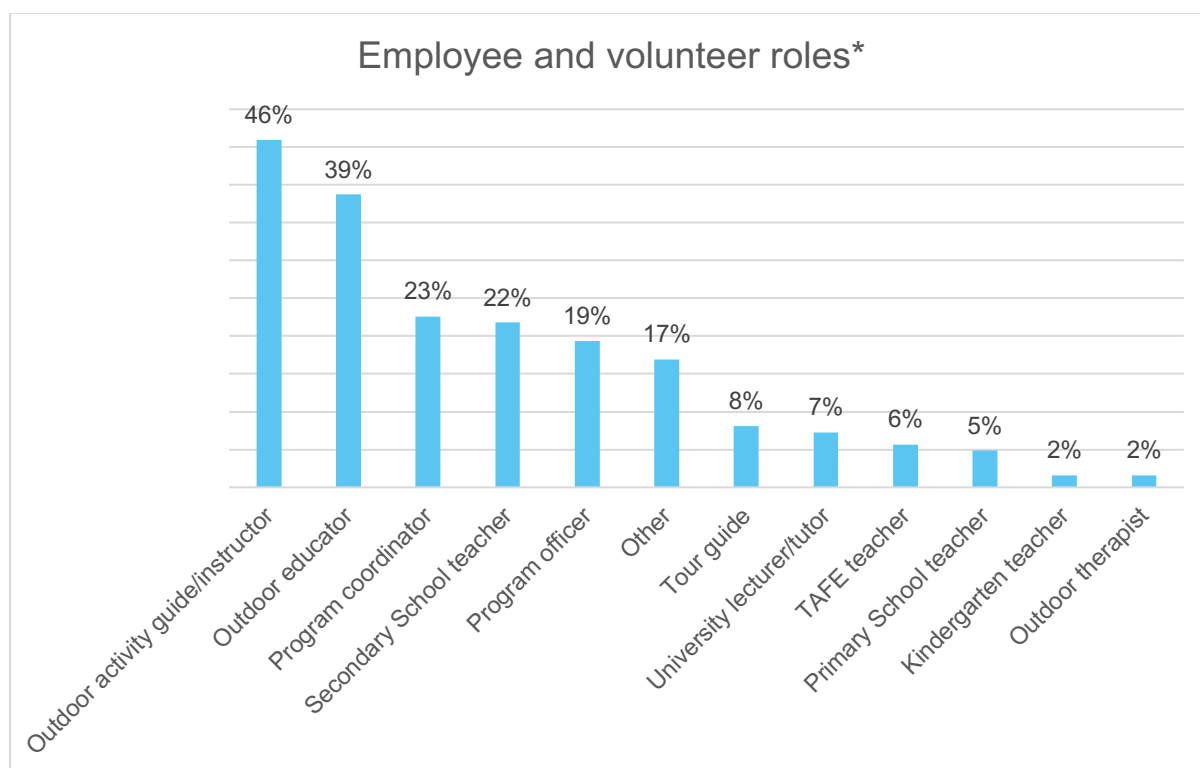


Figure 6 – Employee and volunteer roles (*respondents could select more than one answer)

Figure 7 below shows the industries in which aspiring employees stated that they currently and previously worked. The vast majority identified hospitality (n = 50) as the main sector, followed by the 'other' category (n = 20), which included a wide range of industries, from administration, sales and warehousing to automotive, construction and mail services. Given the relatively young age of most of the aspiring employee respondents, a high level of work experience in hospitality is unsurprising with many entry-level and casual positions available in this sector. **The large variety of other industries, however, is notable as only some of these sectors may provide transferable skills (e.g., care industries, military and tourism), and this finding reveals an opportunity to recruit from less obvious industries (e.g., administration, sales and retail).**

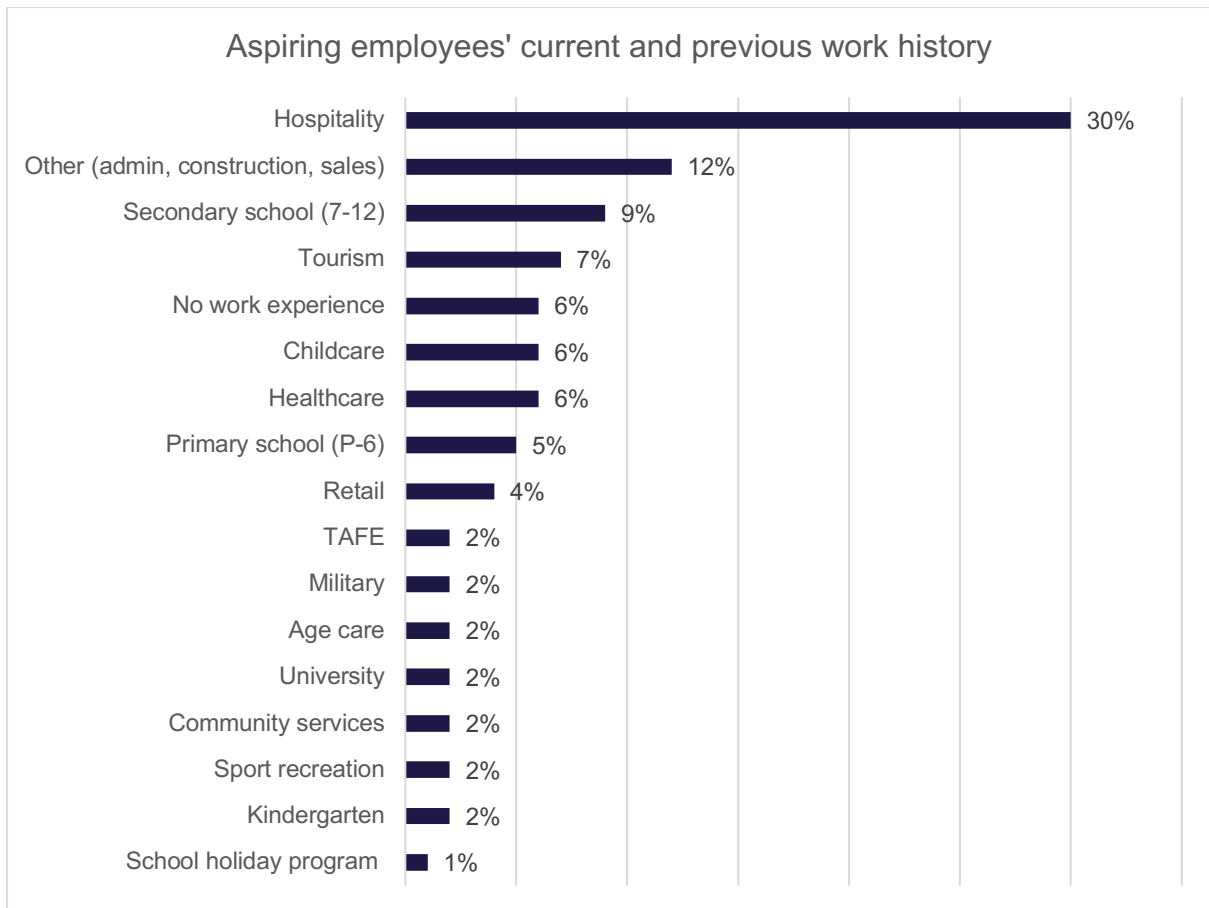


Figure 7 – Aspiring employees' current and previous industries

Aspiring employees were asked if they were considering enrolling in an outdoor qualification (e.g., outdoor leadership or outdoor recreation course). The results are displayed in Figure 8 below and show that most (87.25%) had an interest or already enrolled.

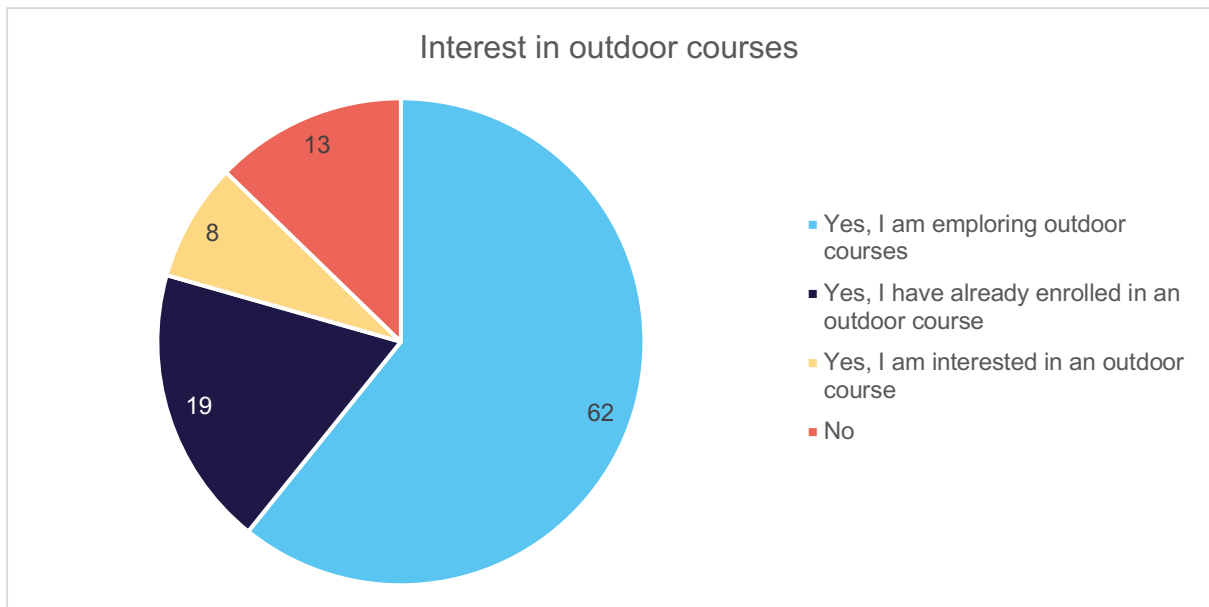


Figure 8 - Aspiring employees' interest in outdoor industry courses

Aspiring employees were also asked about the types of job roles that they were interested in working. A very high majority of respondents would like to be an outdoor activity guide/instructor (n = 76) and/or outdoor educator (n = 61) and almost half would like to be a tour guide (n = 48). This finding may suggest that awareness of employment opportunities in the industry are therefore traditionally associated with such roles.

Figure 9 describes employment status by respondent group, whereby 83% of employers were employed on a full-time basis, while 44% of employee respondents were employed on a full-time basis, of which almost half (46%) are employed as teachers, mainly in secondary schools. **This finding heralds the high rate of precarious work and high casualisation, especially in outdoor educator & activity guide/instructor roles.**

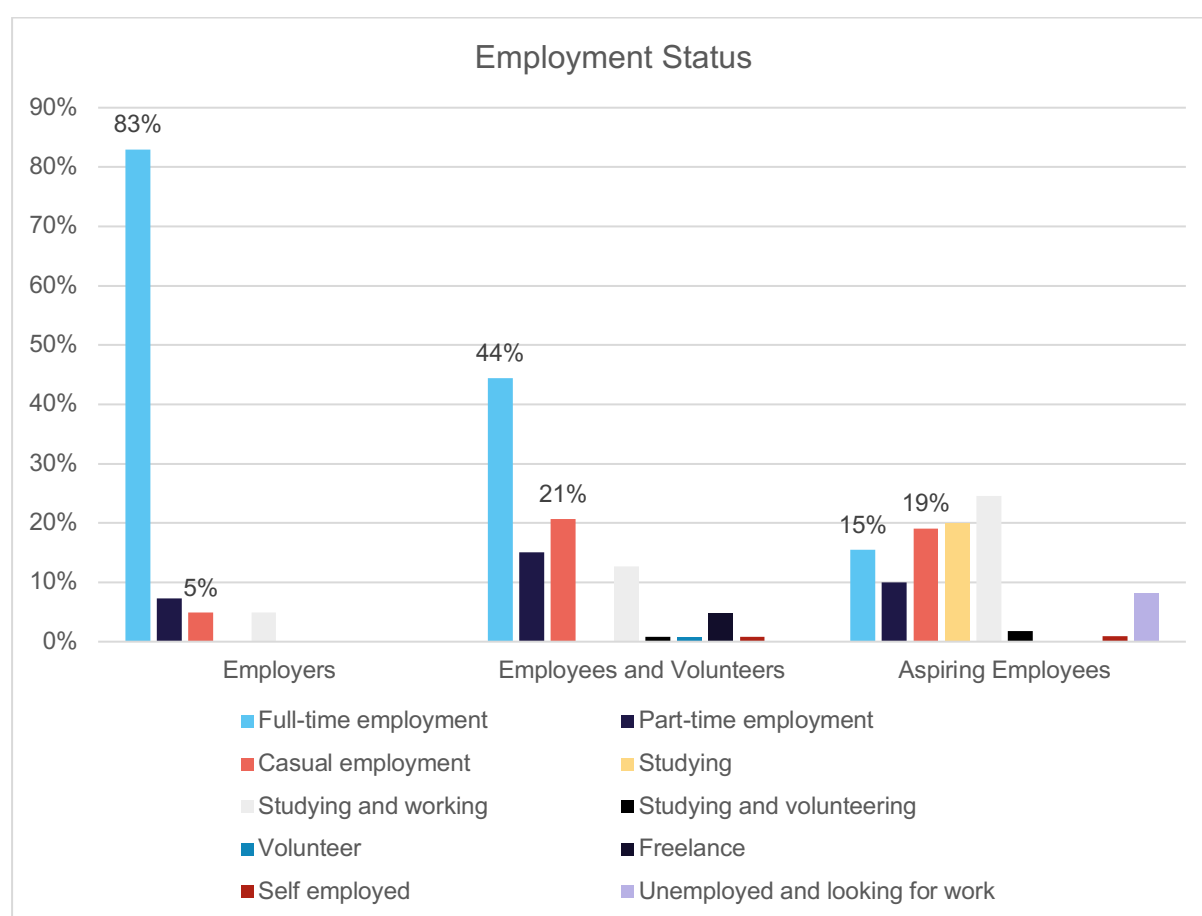


Figure 9 – Employment status by respondent group

The salary brackets of respondent groups are displayed in Figure 10 below. As expected, management and leadership roles generally have higher remuneration. The dispersion of salaries was quite wide; most employers sit in the \$60,000 to \$140,000 bracket, whereas most employees selected the \$18,200 to \$100,000 bracket and most (close to 40%) were skewed towards the lower end of this range. Most aspiring employees had a salary bracket of under \$18,200 or less.

Further analysis (see Appendix B) shows that employees in teacher and program coordinator roles were mostly positioned towards the higher end of this range, while those in outdoor activity guide/instructor, outdoor educator and program officer roles were mostly positioned towards the lower end. Research participants in full-time roles also tend to have a higher salary than those with casual employment. **Together, these findings expose a risk to outdoor industry staff retention, and especially SMEs, if front-line casual employees do not have career progression opportunities into program coordination and management roles, they may look for more secure and highly paid employment opportunities, potentially within the school sector.**

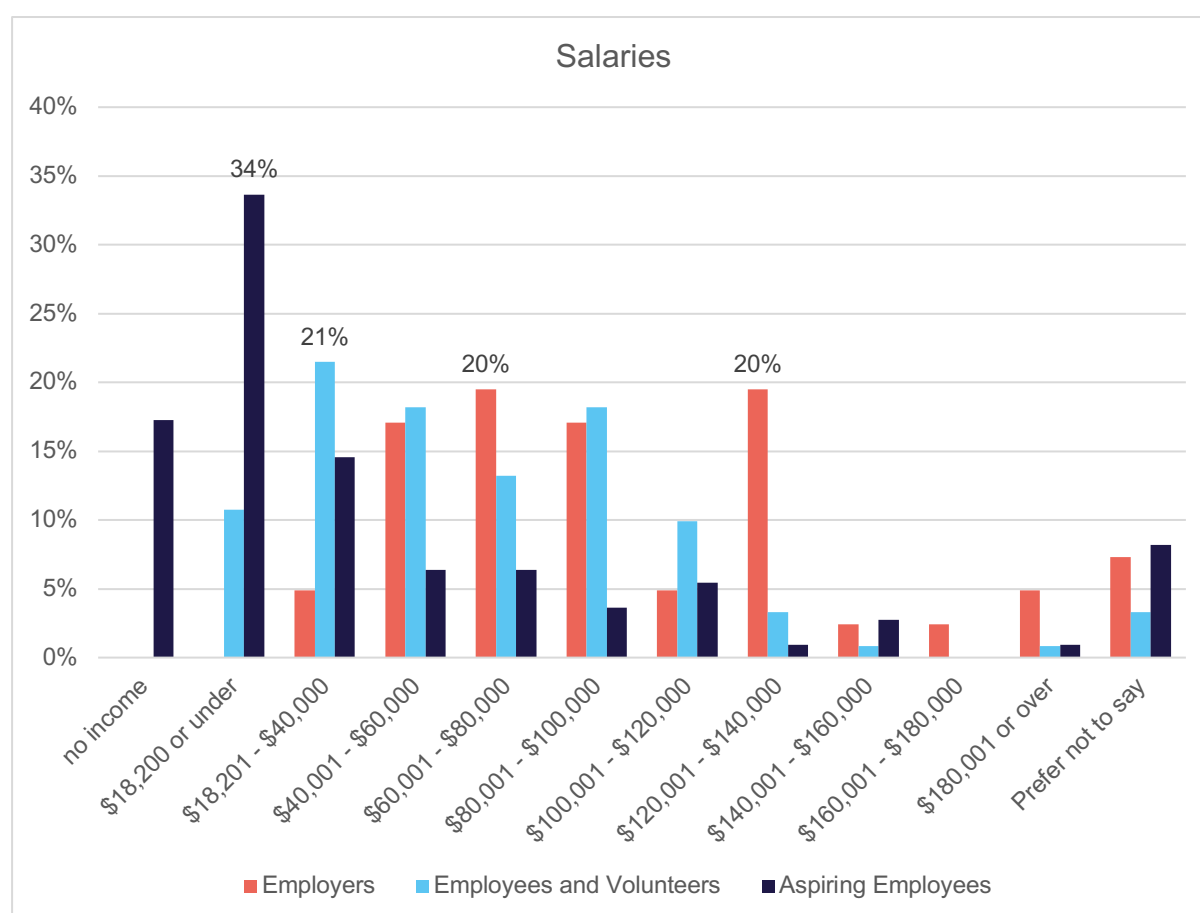


Figure 10 – Salaries of respondents

Figure 11 on the following page shows a comparison of the type of roles that employers offered, versus employees' self-classified roles, against the roles that aspiring employees are seeking. As can be seen here, most employees identified themselves as outdoor activity guides/ instructors (46%) and most aspiring employees would like this type of job (78%). Employers mostly labelled their staff as outdoor activity guides/ instructors (66%). The role of outdoor activity guide or instructor may have a more technical and specific connotation (i.e., it may be more easily explained to others outside the industry), whereas the role of an 'outdoor educator' may be more generalised and not as easily explained. This finding is explored further in the interview findings where a strong theme concerning the industry's identity emerged.

This graph also shows that there is a considerable discrepancy between some of the types of roles that aspiring employees seek and the types of roles in which staff in the workforce are employed. For example, 36% of aspiring employees sought a role as an outdoor therapist, but only 5% of employers reported the recruitment of outdoor therapists and only 2% of employees surveyed were employed in this role. Similar scenarios played out with the roles of outdoor education primary school teacher and outdoor education kindergarten teacher. This may highlight the low level of awareness of the types of jobs available in the industry for aspiring employees.

Further responses provided by aspiring employees revealed other roles of interest. In particular, 49% of aspiring employees were interested in working as a tour guide, which highlights how perceptions of the industry can cross into travel and tourism. Five other potential employee respondents wanted to work as park rangers. **Further responses provided by current employees who specified working in other areas highlighted the wide variety of roles available in the industry**, including administration, human resources, project management, hospitality, tour guiding and wilderness first aid. The employer group were specifically asked if they employed trainees, of which 32% did. This finding shows that there is a relatively high level of traineeships provided by the employer respondent group.

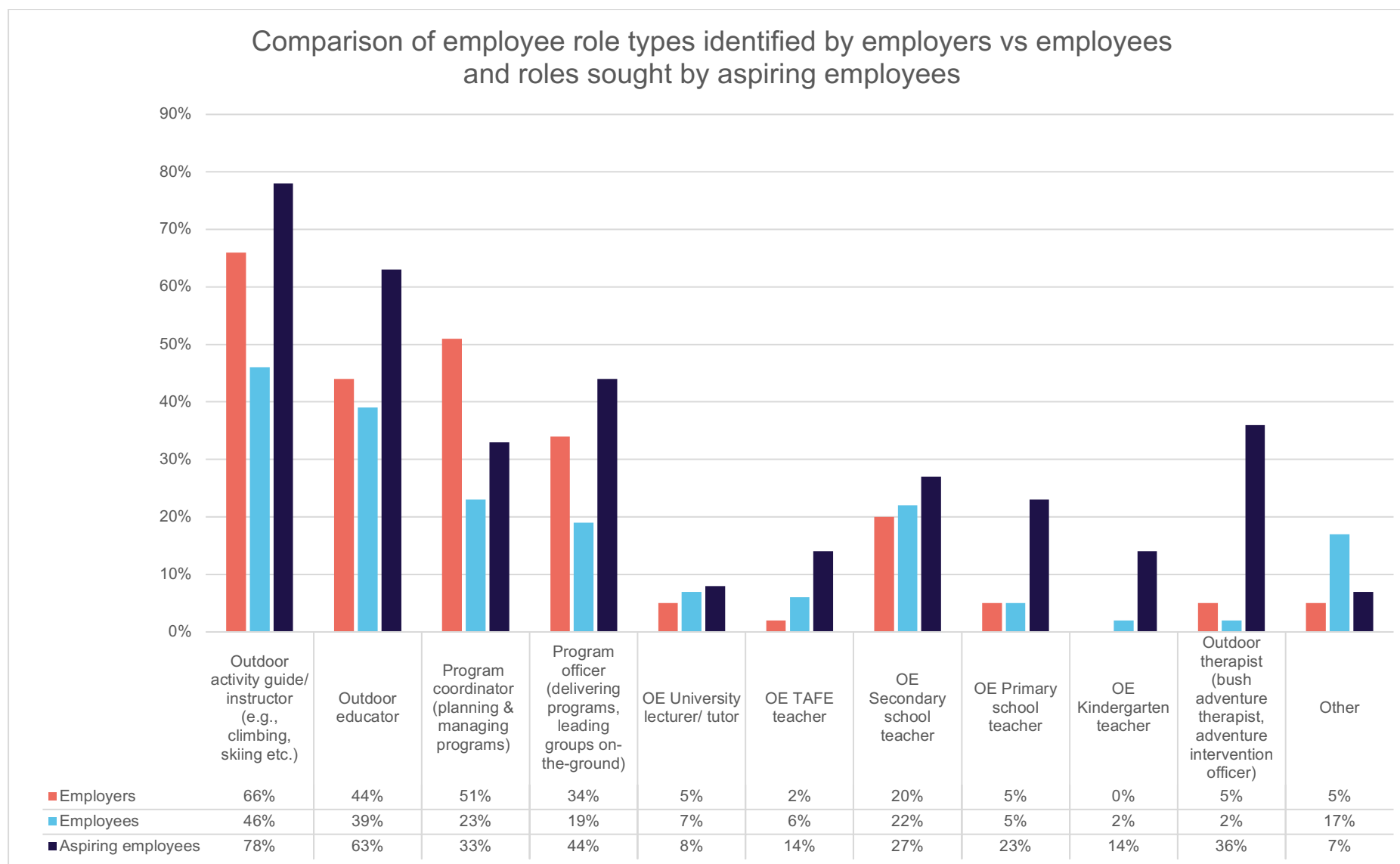


Figure 11 – Comparison of employee role types identified by employers versus employees, and roles that aspiring employees seek

The highest level of qualification for each group is represented in Figure 12 below. This does not necessarily mean that these qualification levels are in courses related to the outdoor industry. Employees are more likely to have a tertiary level education than employers. The aspiring employees skew lower in education levels as a large proportion are still in school or currently studying at TAFE or university. Almost 90% of employees have a vocational or higher education qualification, demonstrating **there is a high level of education in the workforce overall.**

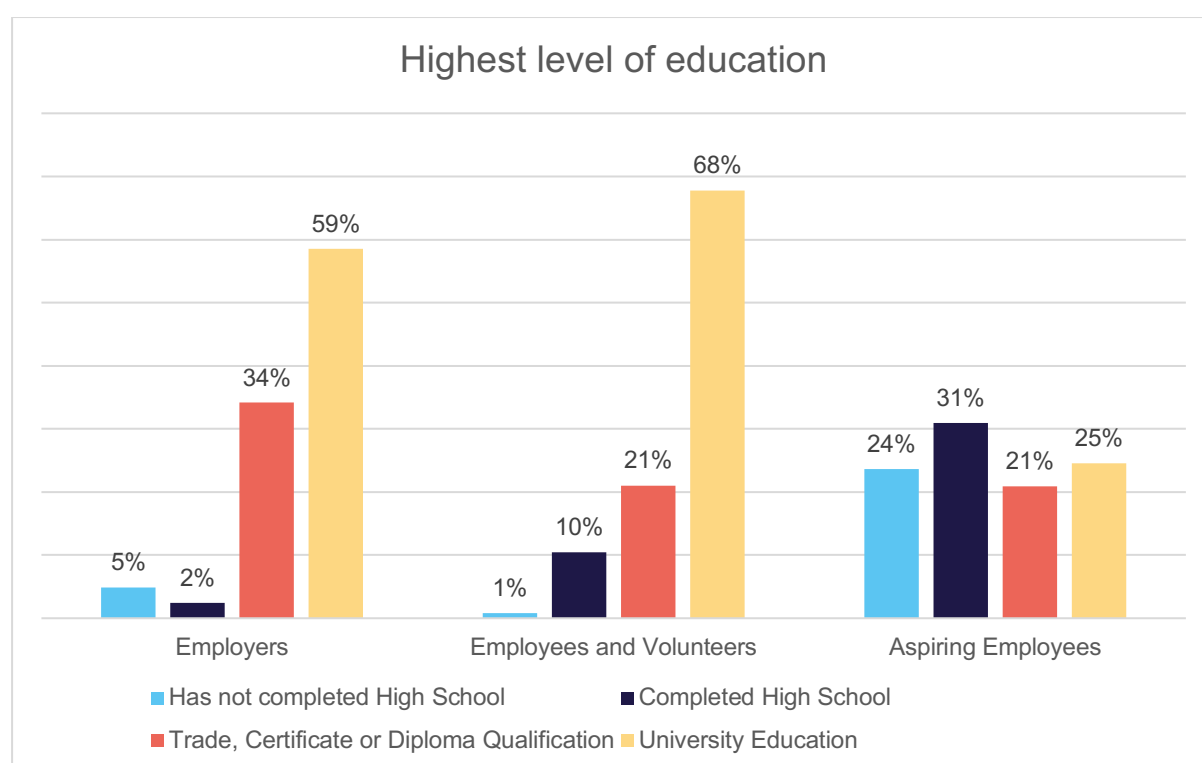


Figure 12 – Highest level of education by respondent group

Figure 13 below focusses on outdoor industry specific courses (e.g., outdoor education/ leadership/ recreation). As is evident in the data sets, employees and volunteers are more likely to have a tertiary or certificate qualification in a relevant course to the outdoor industry. Employers were fairly evenly split between holding certificates, diplomas and degrees.

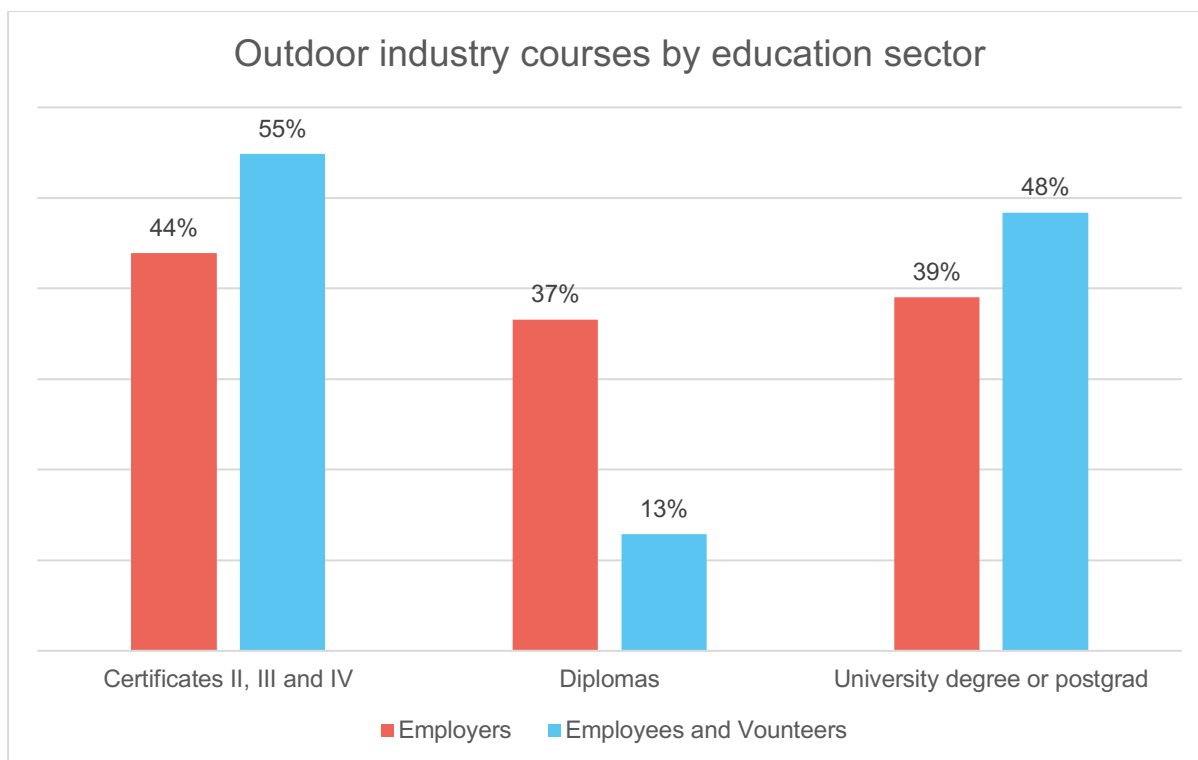


Figure 13 – Outdoor industry specific courses by respondent group and education industry (*respondents could select more than one answer)

Business characteristics

The location of the employers' operations is displayed in Figure 14, showing that most are based in Victoria, followed by New South Wales.

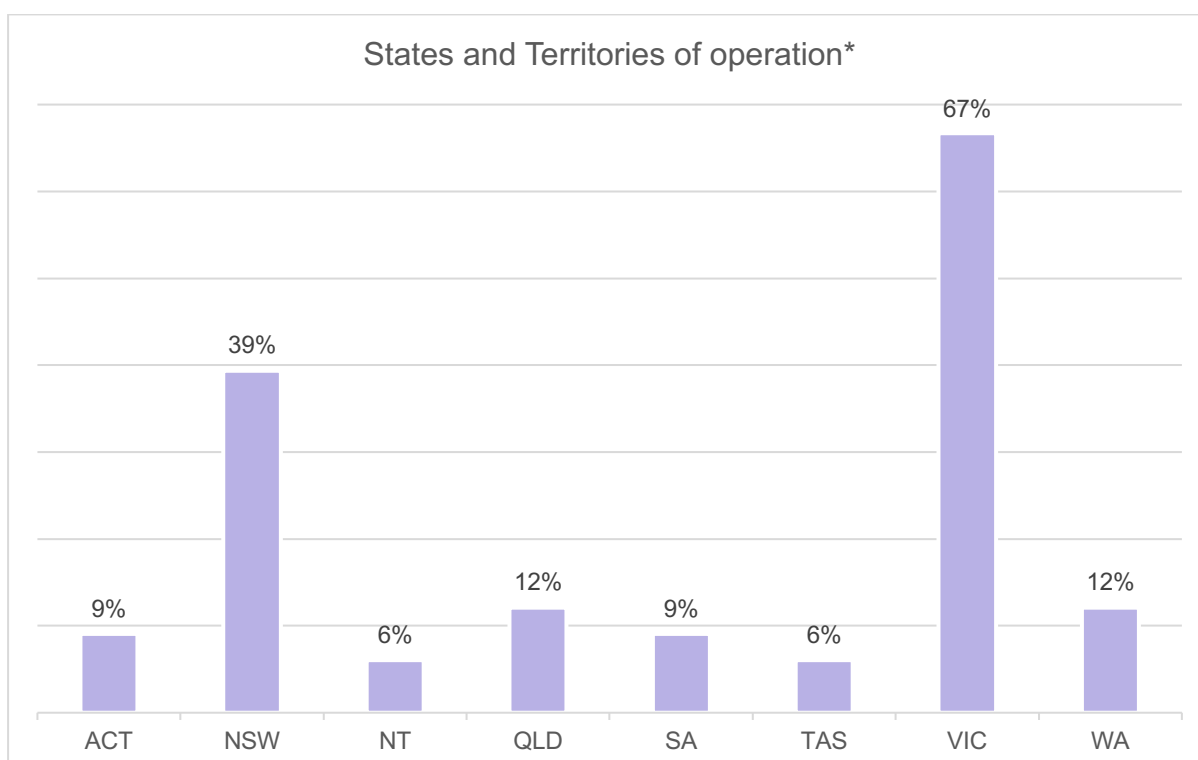


Figure 14 – States and territories where businesses operate (*respondents could select more than one answer)

As can be seen in Figure 15, a large majority of outdoor industry organisations work with schools. International and domestic tourism, along with corporate professionals are also large markets for the industry.

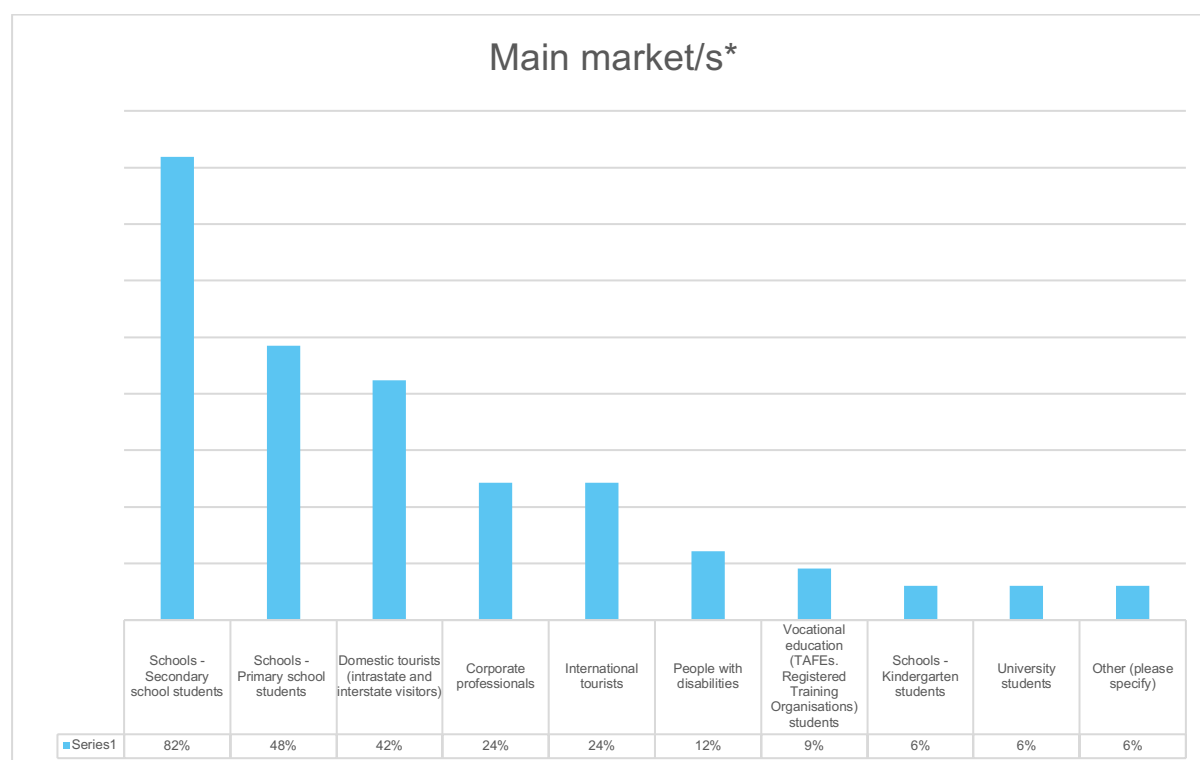


Figure 15 – Main markets that businesses service (*respondents could select more than one answer)

Most of the employer respondents were from medium and small businesses, as shown in Figure 16. As noted previously, a risk to staff retention is presented if the outdoor industry is comprised predominantly by SMEs that can only offer entry-level and casual employment with little or no career progression opportunities.

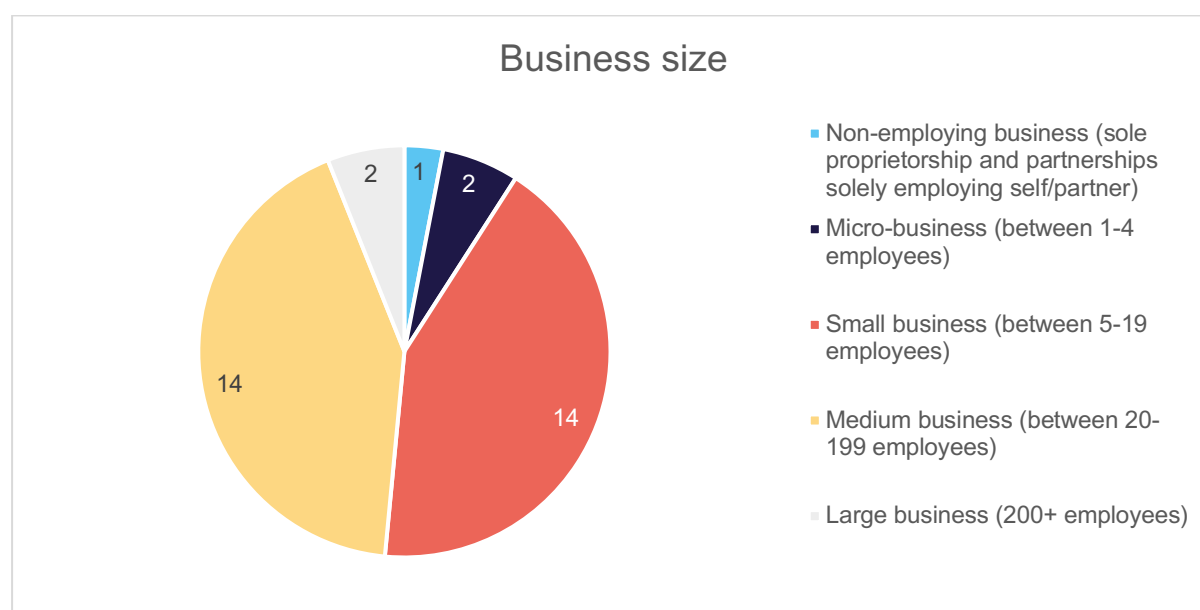


Figure 16 – Business size

Figure 17 shows the main service/s that businesses provided, the majority being overnight multi-day trips. The large proportion of overnight multi-day trip services may be linked to employee stress and burnout, as these trips can be physically demanding and require long working hours and for staff to be away from home and family. These themes are explored more in the analysis of open-ended survey responses and the interview findings in Section 4 of the report.

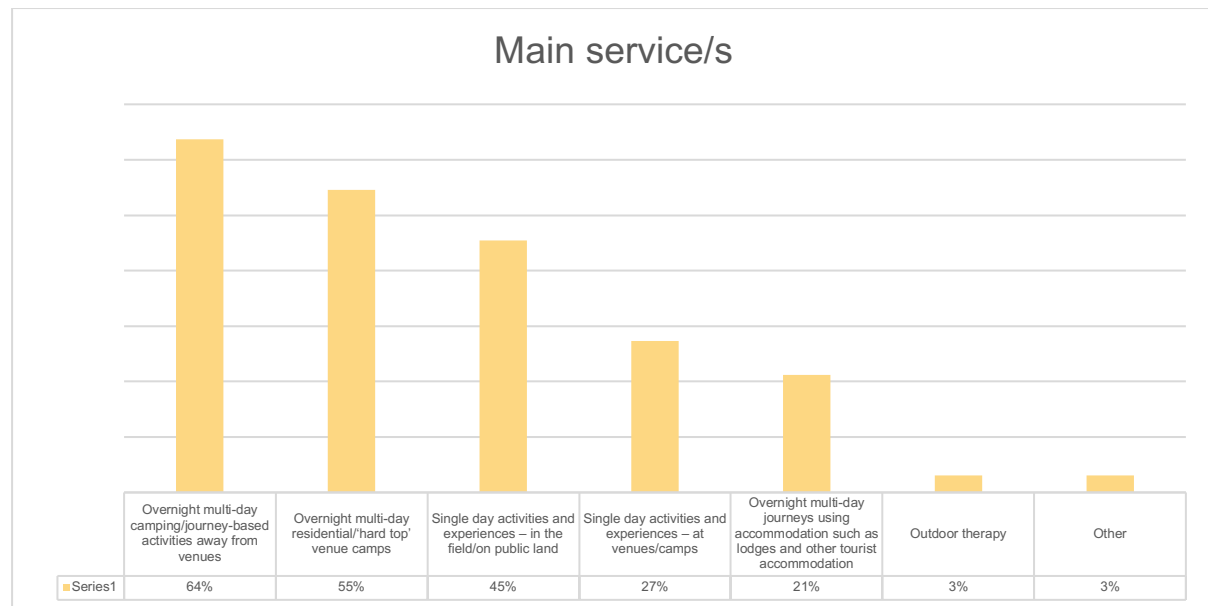


Figure 17 – Main services provided by outdoor businesses (*respondents could select more than one answer)

3.2 Workforce attraction & retention

Labour & skills shortages

As demonstrated in Figure 18, when employers were asked 'over the past 12 months, has your organisation experienced labour or skills shortages for any of the following types of staff?' they were more likely to have experienced labour and skills shortages for front-line staff, rather than in management.

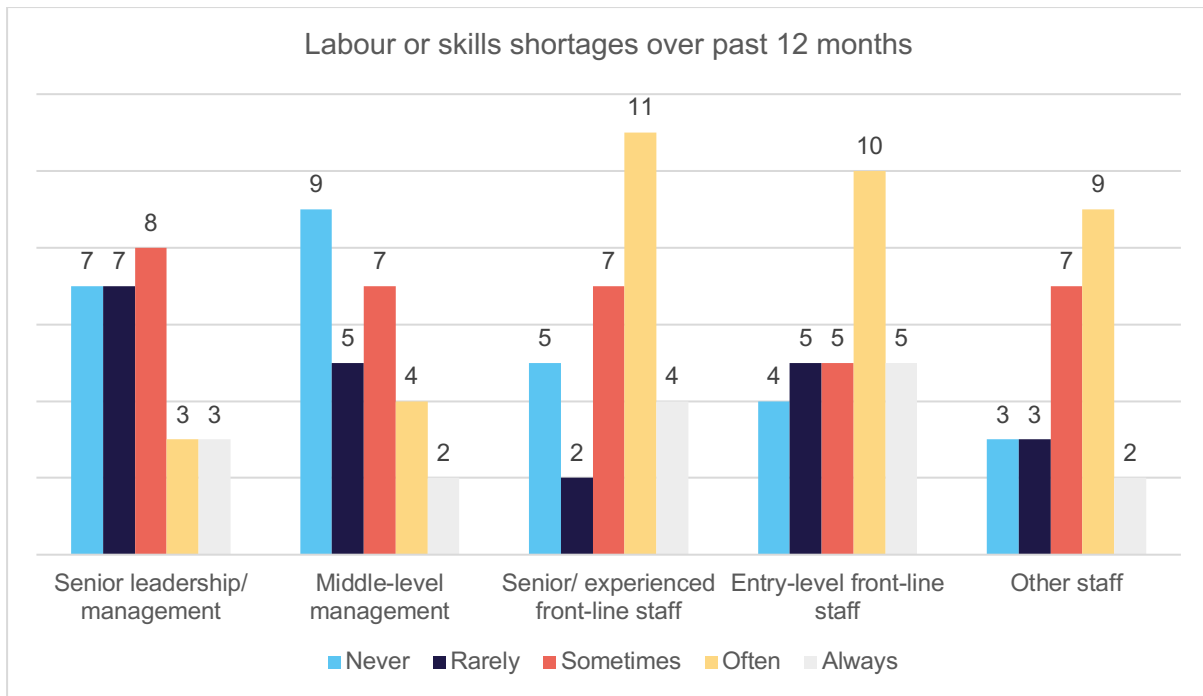


Figure 18 – Labour or skills shortages over past 12 months by type

Most employer respondents are worried about retaining their current staff and attracting skilled staff, while they are somewhat less worried about their business prospects, as shown in Figure 19.



Figure 19 – Employers' staffing and business confidence for the next 12 months

Employers were asked an open-ended survey question as to the key causes of low staff retention and high staff turnover in the outdoor industry. **Many employers mentioned pay or salary as reasons why staff leave the job, alongside long working hours, poor working conditions, time away from families and burnout.** Some also mentioned poor culture within the industry and that staff are not treated with respect or valued. These findings reflect business awareness regarding the poor working conditions and low remuneration in the industry. A selection of quotes from employers is displayed below:

“Transient workforce, salary comparison, growth opportunity, feeling undervalued.”

“A history of worker abuse by employees and a lack of flexibility in the workforce. Burn out rate is so high due to poor pay and conditions for workers, no ability to progress in careers ... providers paying their top tier management top dollar and having side companies turning crazy profits with side companies providing services such as equipment hire, all the while front line staff being left behind.”

“Casualisation of sector. Programs designed for participants not staff with regards to long term sustainability.”

“The transient nature of outdoor staff, long workdays/trips leading to too much time away from home/family/friends, perceived low wages, lack of career progression options, jobs not seen as "real" jobs (public perception issue), staff shortages leading to unsustainable workload for existing employees.”

“Poor culture within organisations. Staff are not treated with respect nor do many organisations have the leadership skills to build positive cultures that provide a meaningful and supportive environment.”

Barriers to entry/stay

Employers and employees had different perceptions as to the barriers to entry and career opportunities in the outdoor industry, with employers rating certain barriers as being more concerning compared to employees' experiences. For example, parental attitudes were seen as much more of a barrier by employers (33%) than employees and volunteers (8%) and aspiring employees (0%). **The disparity in responses between these two groups regarding barriers may mean that there is a lack of understanding or concern by employers as to the issues that are really affecting employees.** The potential employee group were asked a qualifying question 'Are there any barriers preventing you from entering a job/career in the outdoor industry?' of which 66% (n = 51) answered no. The remaining 34% (n = 26) were further queried on the nature of the barriers they faced. Their responses are captured in Figure 20 below.

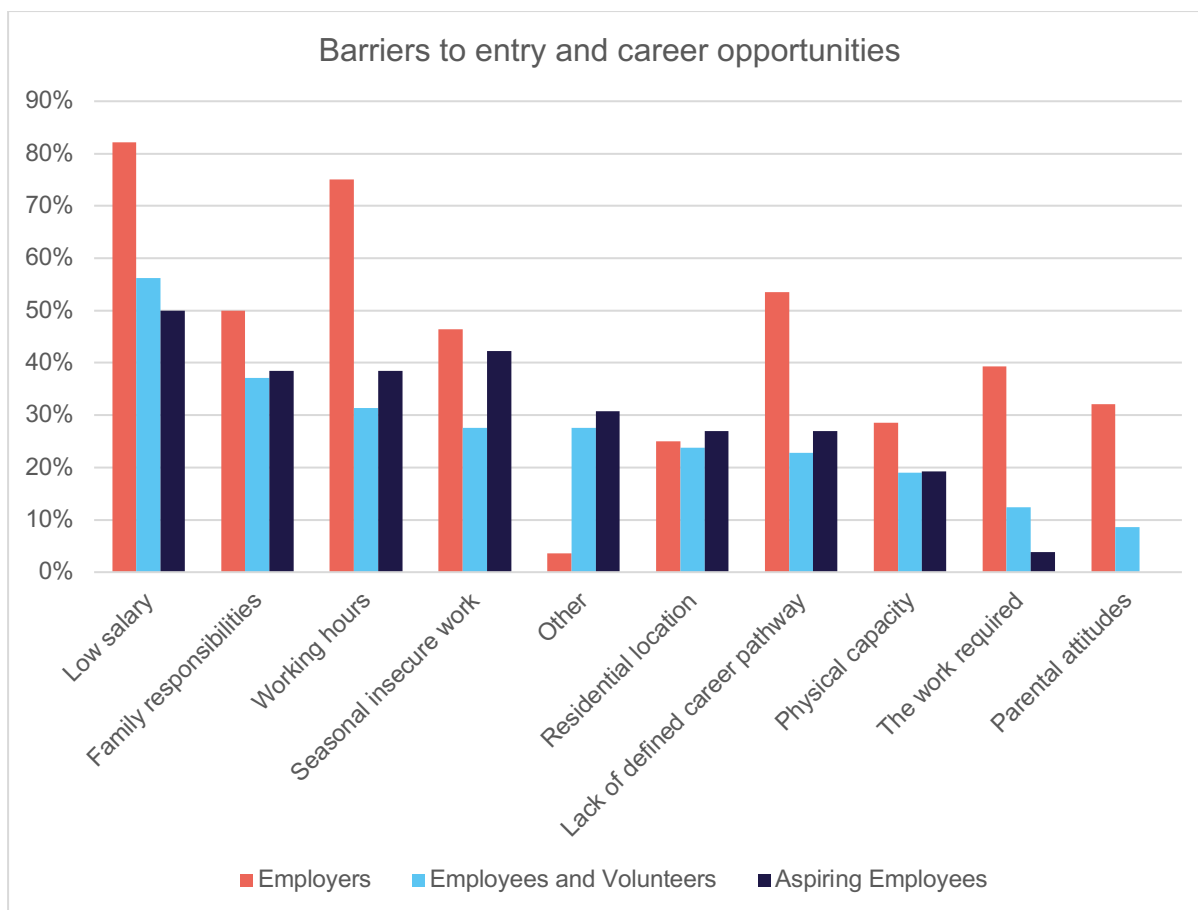


Figure 20 – Barriers to entry and career opportunities

One employer indicated an ‘Other’ reason and stated that all the barriers were over the long-term, while 29 employees stated ‘Other’ reasons, of which a sample are shown below:

“All above, definitely low salary and balancing family/life responsibilities, lack of clear quals and job descriptions is high up there.”

“Have been in and out of the industry. The first was for family and the second was due to mental exhaustion.”

“Lack of union and fair salary.”

“Being treated badly by management. Working in unsafe conditions, being regularly injured at work.”

“Workplace culture in large OE businesses or TAFEs can be negative and slow to change.”

“Minimal/non-existent belief and care for OE within schools, limiting budgets, leading to unsafe practices and no support.”

Potential employees mentioned the following as potential barriers to entry:

“Providing an income for family whilst studying”.

“I worry that there won't be work for someone of my age as the industry seems to mainly consist of young people (understandably!) (I'm 51). I want flexible work and I'm not sure how flexible this work will be.”

“Mortgage responsibilities hamper study opportunities.”

“Lack of job experience and specific training”.

“\$ to undertake further study.”

Reasons and motivations to join and stay in the industry

Employees and aspiring employees were asked to rank 12 key motivators for joining and staying in the outdoor industry. As shown in Figure 21 below, **the key motivators ranked number one by employees to join and stay in the industry are: (1) meaningful work and, (2) job content (interesting work and autonomy)**. While the larger dataset shows that salary was important, and was the main barrier to staying in the industry (as shown previously in Figure 20), this particular finding suggests that **monetary rewards were less important to employees than the intrinsic motivators to have meaningful and interesting work**. While benefits and job security skewed towards being less important, relationships with co-workers was seen as moderately important, along with opportunities for growth and development.

Aspiring employees' top motivators were similar to employees and volunteers, however, salary and benefits were more important to this group. Meaningful work was ranked the top motivator, followed by salary, which was ranked in the top three by half (50%) of aspiring employees. Recognition and praise, as well as job content (interesting work and autonomy) skewed towards being less important with the latter ranked the least important by almost 30%, while opportunities for growth and development relationships were moderately important. **This finding suggests that in addition to the intrinsic motivator to have meaningful work, extrinsic and monetary rewards are more important for aspiring employees and employers can attract and recruit new entrants through offering competitive salaries and benefits.**

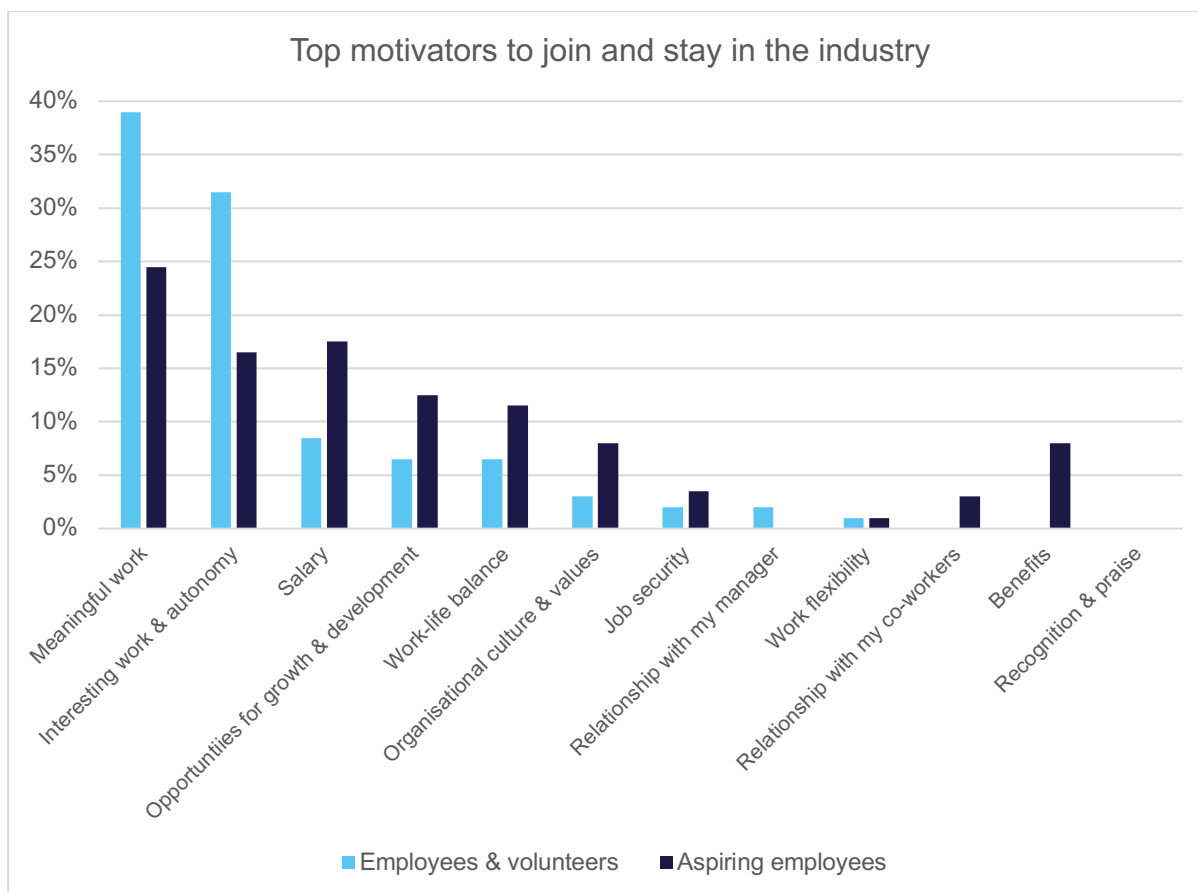


Figure 21 – Motivators ranked most important for joining and staying in the industry by employees and volunteers and aspiring employees

When asked to elaborate on what motivated them to work in the outdoor industry, 103 employees completed the open-ended question. Many spoke of their love of the outdoors and nature, the enjoyment of working with young people and sharing their knowledge. Quite a few mentioned that this was something they had wanted to do since they studied Outdoor Education at school. The below quotes represent the key themes:

“Loved Outdoor and Environmental Studies subject in high school and I was over the moon when I found out I could make a career out of being outside!”

“To educate others about the wonderful things nature can teach us. Creating a space for adolescents and adults to explore and learn in a nature-based environment away from the four walls of a classroom.”

“Passing on my passion to others, especially to those who are less privileged in society or who haven't been able to have the same opportunities that I've had. The outdoors has done so much for me, so I'd love to do the same for others.”

“Outdoor education was a beacon of light when I needed it the most, if I can facilitate that for others I would be very happy.”

“I want to allow others to have positive experiences in nature that they otherwise might not have.”

Employees indicated how long they thought they would stay in the outdoor industry. The majority (57%) responded more than ten years, with each time bracket (e.g., 7 years or more, but less than ten years) thereafter decreasing in respondent numbers, as shown in Figure 22 below. No employees responded that they would stay in the industry less than a year. **This finding highlights the passion and commitment of the workforce, despite the barriers to entry and retention.**

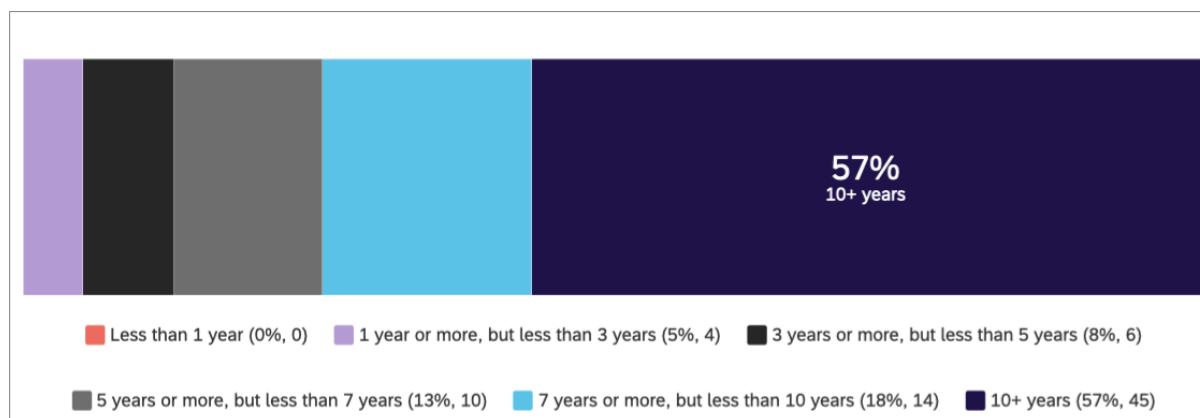


Figure 22 – Employees' intended time to stay in industry

When asked an open-ended survey question **regarding what would need to change to stay longer in the industry, most employees responded higher salary (n = 37), followed by improved work-life balance (n = 15) and more job security and reliable work (n = 11).** Some also mentioned that the public perception of the industry needs to change so that it is valued and receives more government support (n = 9). Other themes concerned needing more local work (regional and urban areas) to reduce commute times and accommodation issues (n = 7), as well as more career progression opportunities (n = 6) and job flexibility for family responsibilities (n = 5). The written survey responses echo the interview findings, which are explored in more detail in Section 4. A selection of quotes from employees is displayed below demonstrating the major themes as well as some individual concerns:

"Pay is the limiting factor in the industry. The quantity of work we do does not equate with what we are paid."

"More work in my region, appropriate work for my age and capacity."

"The physical demand and the lack of work life balance".

"I am hoping that achieving a secure position at a school will allow me to stay in the industry. If this is not possible, being paid for hours worked rather than a daily rate would be a good place to start."

"Acknowledgement of the time we give up in our lives - evenings on program, early starts long days etc."

"I would want to feel safe at work."

3.3 Staff training and development

Career pathways and aspirations

Employee and volunteers were asked to describe their career pathways and aspirations in the outdoor industry in two open-ended questions. **The pathways into the industry are extremely varied, however many of the respondents describe volunteering or working in the field while studying.** Quite a number started as trainees and many have undertaken courses such as certificates, diplomas and degrees in the outdoor industry. Some employees and volunteers took gap years to work in the industry and then decided to take a different career path, whereas others describe a career pathway that began in the field, which led to further study and then progressed to management positions:

“Was accepted into University (Bach of Ex Sp Sci). Took at gap year. Worked at [a] Camp ... Loved it! Went to Uni, did placement in a hospital. Decided the outdoors was more for me instead of being in hospital setting. The gap year really opened my eyes & experience to the industry & the joy I got from being a part of it”.

“Started in American Summer Camps for a couple of gap years, wanted to do that when I got home. Started to work at a hard-top Camp before anything else, then in 2020 started my Bachelors in Outdoor Leadership ... and started to work with [a large employer] at the start of my second year.”

“Straight into the workforce after completing Uni. I have progressed from group leading into a management role.”

“Trainee, studied Sport's science, followed by addition diploma in 'Outdoor Adventures and Nature Guiding', seasonal employment as a white water guide, full-time employment as a Group Leader, then Program Coordinator, then Head of Operations.”

Analysis of the 90 open-ended responses to the question about career aspirations identified a number key themes, including aspirations to own a business, work in the university or TAFE sector, work in schools, find permanent work, work and travel overseas, and undertake further study. Some employees wanted to remain in their current positions working with their preferred companies, while the majority sought career progression. One person said they would leave the industry if working conditions did not change. **These findings regarding career aspirations reinforce that despite the workforce challenges, many employees aspire to remain in the industry and want to progress in their careers.** As discussed more in the interview findings in Section 4, this appears to be linked to the passion and commitment of workers to the industry.

Figure 23 below represents the strength of these key themes regarding employees and volunteers' career aspirations.

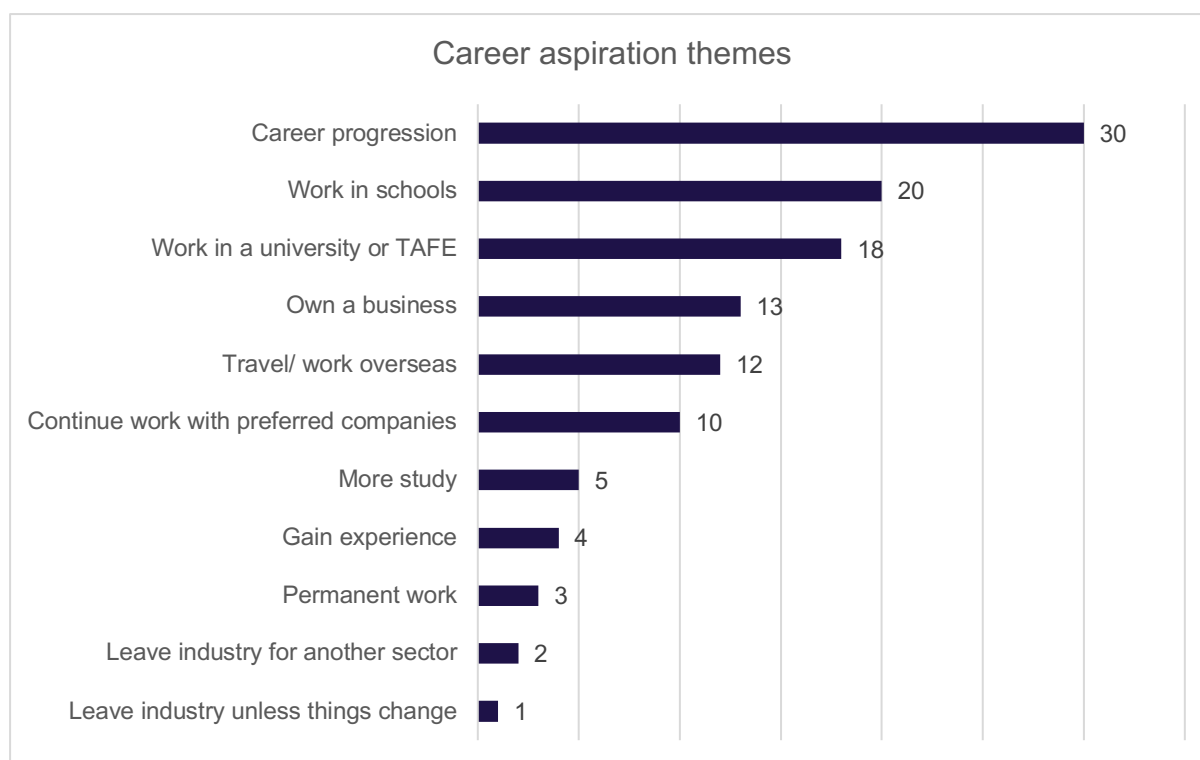


Figure 23 – Employee and volunteer career aspiration themes

Almost three quarters of employers (73%) require or prefer employees to have qualifications, including qualifications from a university, TAFE or private registered training organisation.

When asked why qualifications were important, several employers cited safety and standards, in addition to compliance reasons to meet requirements for government, insurance policies and land managers:

“For insurance, to match in with the AAAS [Australian Adventure Activity Standard], as a requirement to work with department of education and to provide a base level of training on which a professional worker can be developed.”

“They are often required by insurance or land managers and are helpful for demonstrating level of expertise to clients.”

“Canyoning quals are a requirement of our Parks Ecopass. Our staff having formal qualification delivered in a similar way for technical roping activities helps us to be on the same page as an organisation. For us to take on the training burden of delivering a full range of roping skills to staff would not be practicable. I also doubt it would be acceptable to our insurer.”

Work readiness of graduates

As demonstrated in Figure 24, more than four out of five employees thought that their training provider prepared them for the industry. Graduates' work readiness is discussed further in the interview findings in Section 4, which show that employers found otherwise.

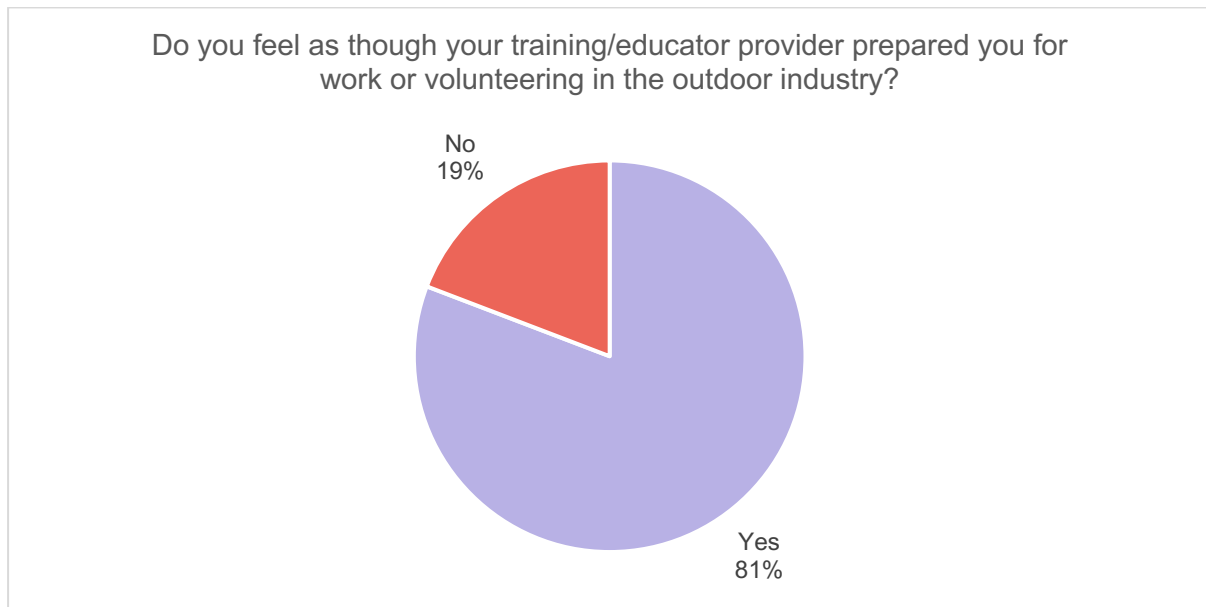


Figure 24 – Graduates' preparedness to enter the industry

Employers' opinions on training

Figure 25 below outlines whether employers agree or disagree that the training on offer is what they need, is affordable and responsive. As can be seen, the results are quite mixed. About half of the employers believe that training organisations are not responsive to their needs or that training is affordable. The kind of training that is offered is more acceptable to employer respondents.

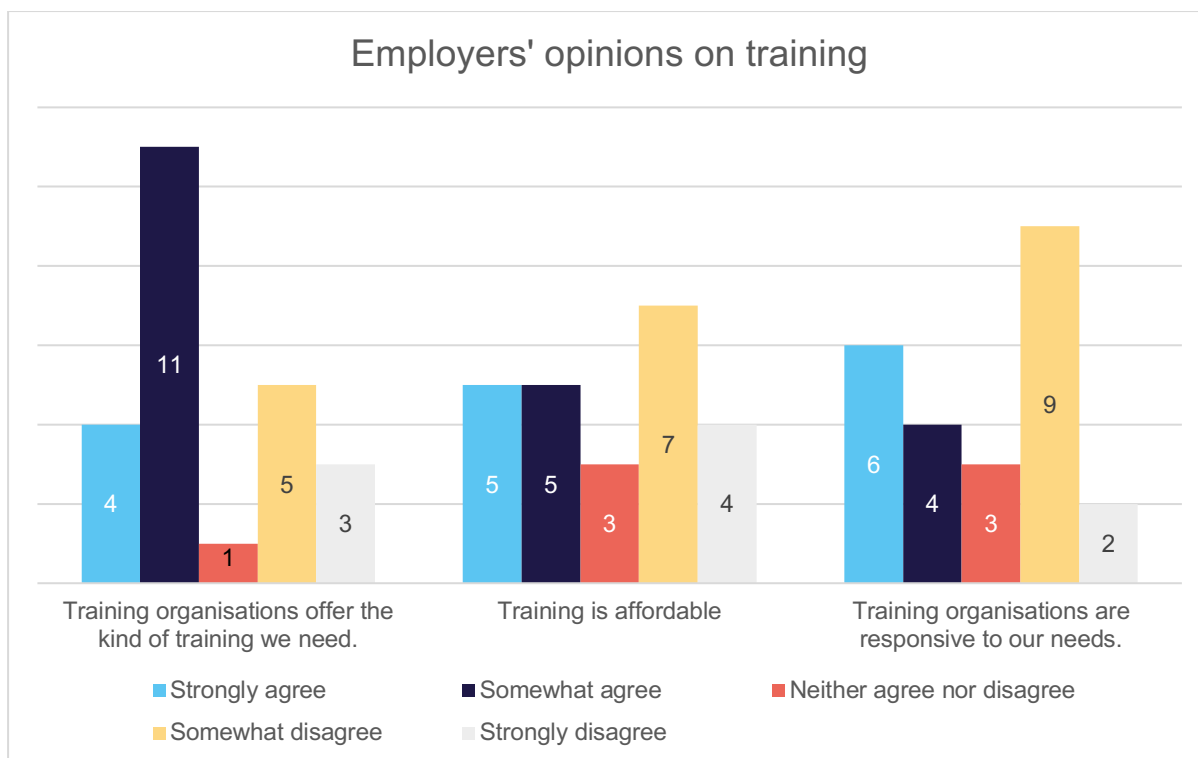


Figure 25 – Employers opinions on training

Training & professional development provisions

Of the employers surveyed, 82% stated that their organisation allocated a budget for staff to undertake professional development activities. Permanent staff are provided with substantially more training days than casual staff, as illustrated in Figure 26. Most employers provided onboarding training, safety training and technical skills training. **In a highly casualised industry, the unequal access of professional development opportunities by permanent and casual staff potentially represents a key barrier for employee retention and engagement.**

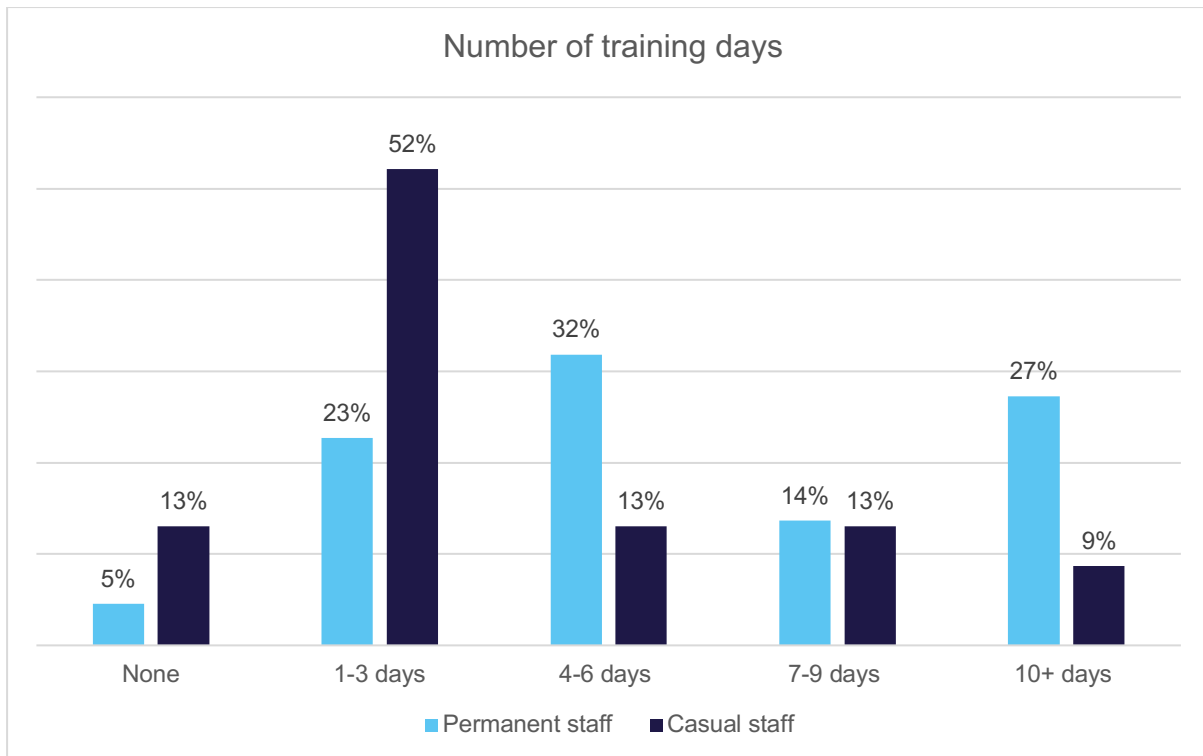


Figure 26 – Average length of training provided/allowed per a year per employee

The vast majority of employers reported that their organisation provided onboarding/ orientation/ new employee training, as well as safety and technical skills training, as presented in Figure 27 on the next page. When asked to specify technical skills training, employers identified activities that may have a higher risk profile, such as high ropes and swift water. Others mentioned that they conduct activity inductions or activity specific training. **Around half of employers offered diversity/ inclusivity/ equity training, teamwork training, and/or Indigenous knowledge training, exposing an opportunity to increase training in these areas at an organisational level.** Themes surrounding diversity, inclusion and accessibility are explored further in the interview findings.

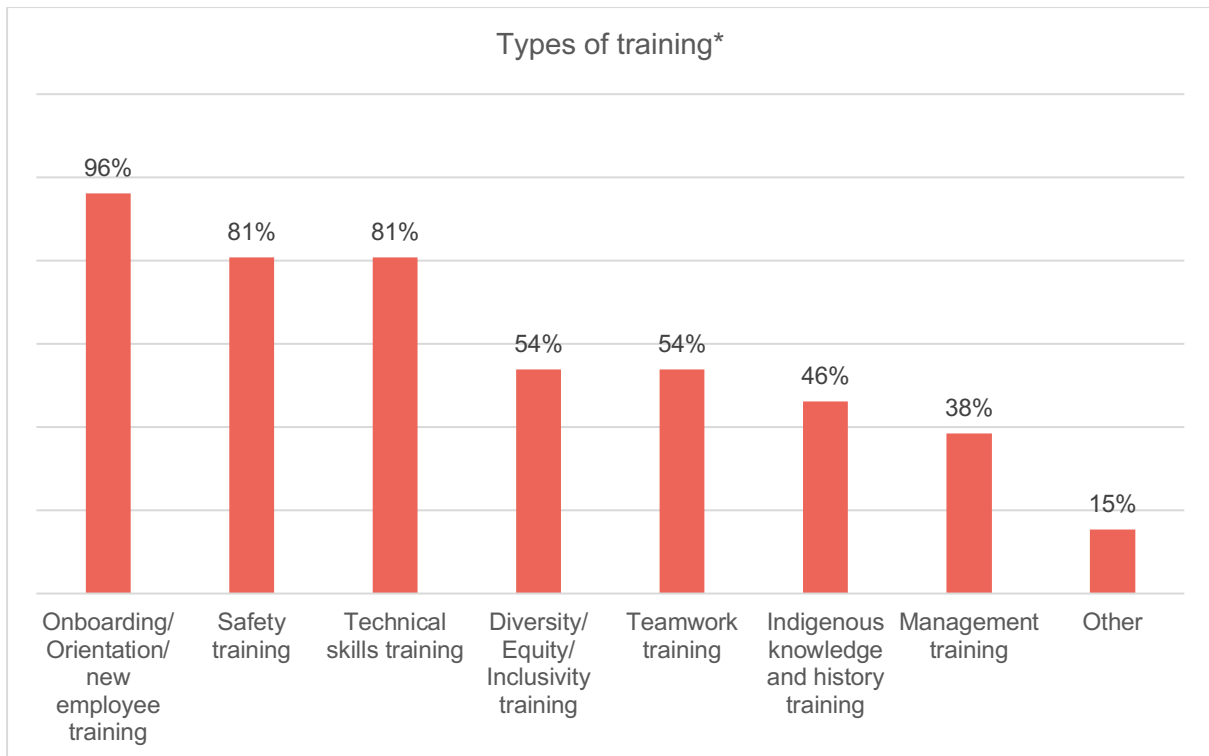


Figure 27 – Type of training offered by employers (*respondents could select more than one answer)

3.4 Perceptions of the industry

Each of the survey groups were asked questions about the perception of the outdoor industry. As can be seen from the charts on the following pages (Figures 28, 29 and 30), all three groups believed that outdoor industry work is meaningful, and that work is not boring. Aspiring employees demonstrate less certitude on the work conditions of the industry, including whether salaries are competitive, whether career progression exists and whether jobs in the outdoor industry are secure. While this may not be surprising considering the limited work exposure of aspiring employees to the industry, **an opportunity is presented to increase public awareness of the career opportunities and work conditions of the outdoor industry.**

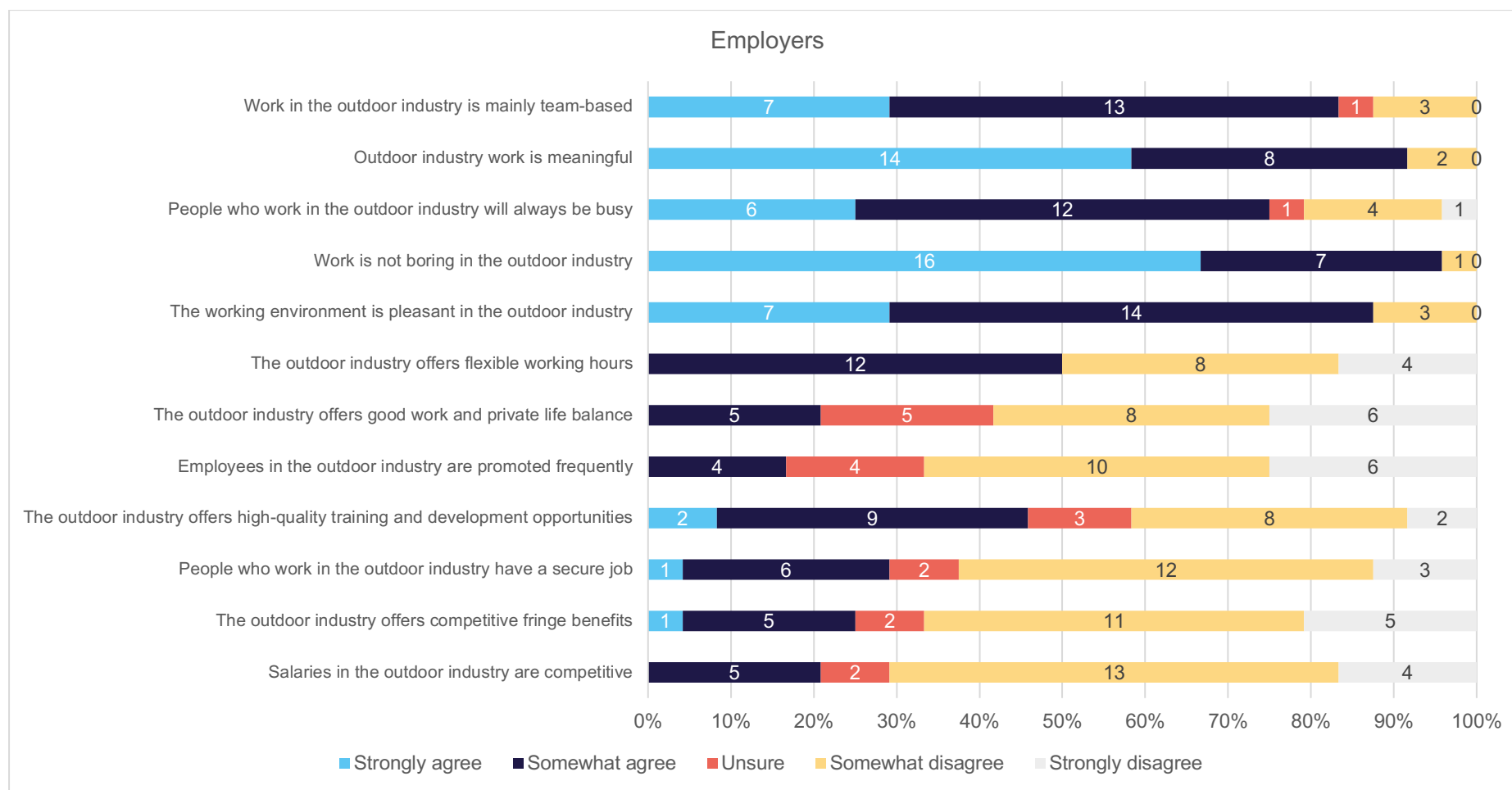


Figure 28 – Perception of the outdoor industry by employers

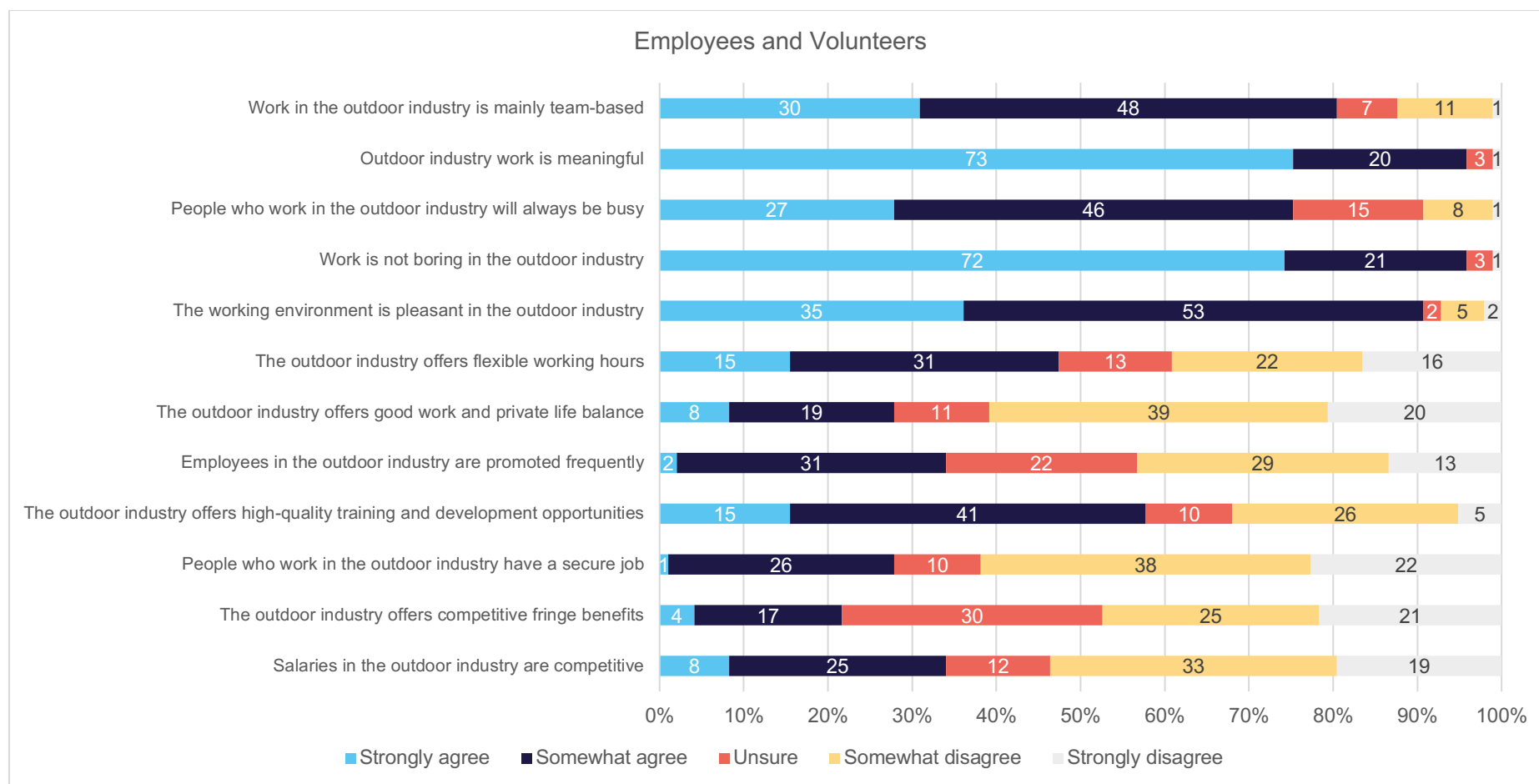


Figure 29 – Perception of the outdoor industry by employees and volunteers

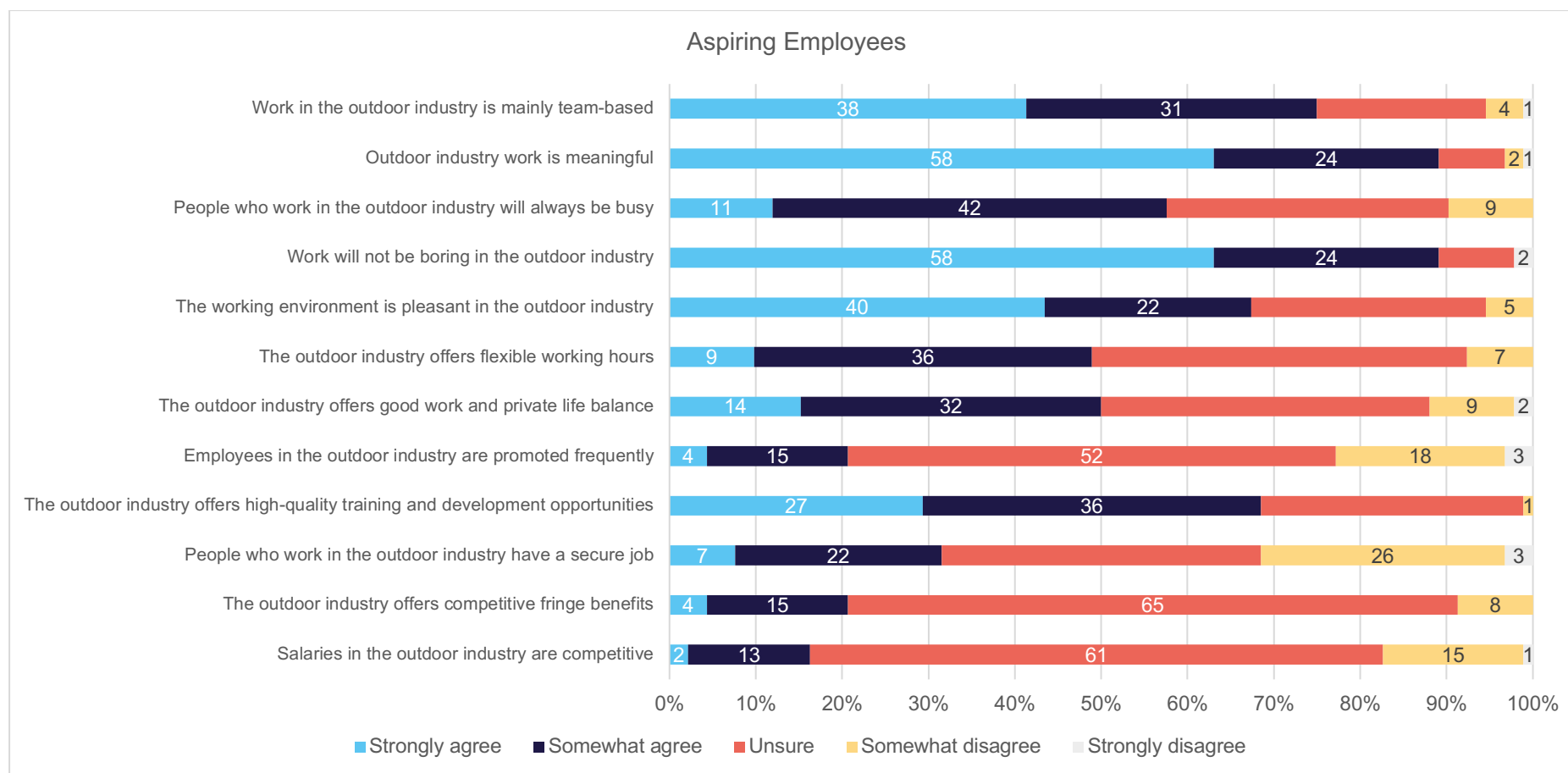


Figure 30 – Perception of the outdoor industry by aspiring employees

3.5 Survey findings summary

Findings from the survey data analysis encompass several focus areas, including workforce demographics and organisations' profiles, staff attraction and retention issues, training and professional development concerns, and initial insights into perceptions of the outdoor industry. Key findings are outlined as follows:

- People who are employed, volunteer or aspire to be employed in the outdoor industry are mostly young, highly motivated, and passionate about the outdoors. While aspiring employees are more extrinsically motivated by salary and benefits than existing employees, a top motivator for both groups to join and stay in the industry is meaningful work. Yet, employers are very concerned about how they will attract and retain staff, especially front-line workers. Opinions differ on how to solve the workforce problems, but pay, working hours and conditions were identified as issues of concern for all three groups. There is an opportunity to recruit from secondary schools/ VCE students with most aspiring employees still completing school.
- The findings suggest a high level of precarious work, and lower rates of pay for front-line workers. Full-time staff and teacher and program coordinator roles, however, were mostly positioned towards the higher end of the salary bracket. A risk is exposed for casual staff retention, and especially SMEs, if career progression opportunities into more secure and highly remunerated employment opportunities are not available.
- A considerable discrepancy emerged between some of the types of roles that aspiring employees seek (e.g., outdoor therapist) and the types of roles in which staff in the workforce are employed (e.g., outdoor educator and activity guide). This suggests that the types of job opportunities that are sought by some people who are considering work in the industry are not necessarily available, which may demotivate and lead them to look elsewhere. At the same, this finding may indicate that aspiring employees' expectations do not match reality, highlighting the importance of clear and accessible information sources about the employment opportunities in the industry.
- Further, while the industry is broad and encompasses a wide variety of jobs, the findings around career pathways and aspirations suggest that employment opportunities are mainly associated with activity/tour guides and outdoor education positions, which underscores the importance of future work to delineate the boundaries of the industry.
- Another disparity in responses regarding barriers between employers and employees/ volunteers/ aspiring employees may mean that employers see certain issues as more critical and may lack awareness or understanding of other barriers.
- Representation for people from minority groups was relatively low across all respondent groups and particularly in management. A gender imbalance is observed in the employer group, which is male dominated. While respondent numbers skewed higher for people who are sexuality and gender diverse, people with CALD backgrounds and people with disability were lower than the national average.
- Importantly, despite the workforce challenges, many employees aspire to remain in the industry and want to progress in their careers.

4.0 Interview findings

This section of the report draws on the qualitative data (interviews and focus groups) to discuss themes relating to the outdoor industry's sustainable workforce development. A list of interviewee attributes is found in Appendix C. Data were analysed using NVivo software. Recurrent topics emerged as central issues to sustainable workforce development, which are captured by the following themes: (i) public awareness and the industry's image and identity, (ii) staff attraction and retention linked to working conditions, (iii) challenges surrounding diversity, inclusion and accessibility, and lastly (iv) increasing professionalisation in the industry and staff training and professional development. These are explored in the following sub-sections using excerpts from the interviews to further illustrate the findings.

4.1 Industry image, awareness & identity

Analysis of the data identified that the skills and labour issues in the outdoor industry are underpinned by pervasive image and identity problems, reinforced by little understanding of the scope of the industry, low awareness of its existence, and contested definitions. These themes are detailed in the following sub-sections.

KEY THEMES FOR INDUSTRY IMAGE, AWARENESS & IDENTITY

Image: Interviewees perceive that the outdoor industry is not viewed as a serious industry. The image of the industry is of a macho, male dominated culture, and of fun, low level and temporary jobs, with little prospect of career progression. Some CALD communities may view working in the outdoor industry as a low prestige job.

Awareness: The complex nature of the industry, along with much of the industry being out of sight, a lack of childhood camps experience, jobs being advertised on closed social media groups and a lack of marketing, could impact awareness of the industry.

Identity, collaboration & leadership: Defining industry characteristics are contested, and some interviewees believe the industry is being identified inaccurately. As such, the identity of the outdoor industry is unable to be clearly formed nor its value communicated adequately. Further, national statistics are not collecting sufficient data. Negative narratives and self-talk undermine the industry's self-image and turn away aspiring employees. An industry 'reset' and the formation of an employee association were suggested as possible solutions.

Industry image

Interviewees perceive that **society undervalues the outdoor industry and believe that many people do not see it as a 'serious career' nor a 'real job'**. This was a sentiment that some research participants worried was shared by influential people working/ educating/ leading in the field itself, albeit a minority. The industry is largely seen to offer temporary jobs with very little career progression. The following interview excerpts reflect this theme:

"I think that at the core of part of the [workforce] issue that ... there's still a perception about our industry that it is part of the leisure industry and the recreation industry. The component around outdoor education isn't well and truly understood, even though a lot of young people do outdoor education camps as part of their schooling. There's still an element of the job being perceived by especially older people, so

staffs' parents in particular, as a fun, temporary job, something that you do on your gap year, something that you do before you get a 'real job'. There is a lot of misunderstanding, as far as what the skill set involves, and the responsibility involved in looking after people in the outdoors, as well as the education component, that's not really appreciated. A lot of it is perceived as what is usually depicted in tourism advertising, so your peak experiences, so someone dangling on the rope, or someone climbing or someone white-water rafting is often the perception that people have as far as what this job involves". P3, Employer

"That perception or misperception of the industry or jobs, what your day is like, it doesn't just extend to universities or TAFEs or whatever. I've experienced that within my own organisation where we have people who, they're going to clients and to the schools, and they're talking to people in the public and stakeholders and whatever, about outdoor ed ... but if I try and explain to them that it's not all sunshine and rainbows all the time, I do have to wake up at all hours of the night because I've got a student who's been sick in their tent or whatever it is. It's hard work. We love it. I would not be doing this if I didn't love it, but that doesn't mean that it's all Cherry Ripe and easy going all the time. I think we need that support a bit more within the industry and making people who want to come into the industry more aware of that as well". P45, Employee

A number of interviewees across the employer and employee groups felt as though roles were both portrayed and perceived as being 'fun' and having low levels of responsibility. This in turn led **some employers to believe that aspiring and current employees' expectations of the industry do not align with reality in terms of working conditions, setting them up for disappointment.** One interviewee made an association between outdoor education and the 'Camp America' brand, which is a summer job for young people in the USA, often used as work experience during a gap year before undertaking further education. The implications for pricing and remuneration were explored by interviewees, illustrated by one industry expert below:

"I think society as a whole undervalues the outdoor industry, outdoor recreation and what it provides. So, they're not willing to pay for a quality product. A psychologist costs \$200 an hour to go to. People want to pay \$200 for half a day in the field or a day in the field. So, if you're only paying very low rates how do you pay your staff? How do you invest in them? ... I don't think it [society] values the skill that it actually takes to become an outdoor guide ... you need to spend thousands of hours, tens of thousands of hours to look at all of the challenging ideas ... you need to be able to do it [outdoor skill sets] when it's raining, when it's sunny, when it's cold, when it's hot ... The outdoors is such a dynamic environment; if someone in the outdoors screws up, someone dies. If someone in an office screws up, someone loses money." P10, Industry expert

The vast majority of research participants saw the industry as having very little diversity (i.e., the outdoor industry is predominantly white and male-dominated). While diversity in the industry is explored more in Section 4.3, **in terms of image, there were a range of**

perceptions tied to more typically masculine qualities. A number of interviewees believed many people are only aware of the more risky, high-adrenalin activities and perceive the industry to be 'rough and tough' and macho. One interviewee found that parents voice fears about programs being run like harsh military style boot camps for children.

The attitudes of parents, teachers and career advisors were seen to dissuade children/students from studying or working in outdoor education, in part because they do not see it as a viable profession and/or career option. Other reasons included an increasing risk aversion from parents/ guardians and a lack of perceived prestige or cultural appropriateness (e.g., women working closely with men), especially from CALD communities and cultures with strong family/ community bonds and influence. Different cultural views of the outdoors included a fearfulness of the outdoors/ wilderness, as well as stigma associated with working outdoors as a low prestige job, as articulated by the following interviewee:

"... part of the cultural challenges for CALD families like Africans to be involved in outdoors ... There is a stereotype, a kind of stigma that is seen with working outside ... it's not seen as a highly prestigious job". P39, Prospective employee

Industry awareness

Participants believed that there is low public awareness of the industry, together with the type of jobs and opportunities to advance within it. Several employees found that people outside the industry do not understand their job; at the same time, staff found it difficult to explain their work themselves, partly because their roles vary considerably depending on the employer and across different programs. The limited understanding of the industry, restricted to group leader roles, was linked back to its image:

"I think the image that this industry has is very much a group leading image, people that are with clients delivering an activity, there is not a good understanding, not at the societal level, not even as people that are starting in the industry. There's so much more behind the scenes that you can get involved in and progress in a variety of aspects". P3, Employer

"... with regards to pathways and moving forward, I'm going to be honest, I'm still a little bit unsure as to what they are. Because I think, for a lot of people, the perception is if you get into it, you're just going to be a facilitator. That's pretty much what you're going to do for the rest of the time that you work for that camp or something like that. You're not going to step sideways into a management role or logistics support role. Because those roles aren't sold. All of the information about that is not presented to people to have a look at ... I don't think it's well defined, or the information is not well delivered." P18, Prospective employee

"I actually don't know much about what jobs are available. My impression was there's not many jobs available in that industry. I had a quick look [on Seek]." P17, Aspiring employee

Interviewees provided a diverse range of potential reasons impacting awareness and understanding, including: (i) the broad and complex nature of the industry comprised of various sub-sectors, (ii) many camps are not physically apparent due to remote locations, (iii) a lack of exposure to the outdoors and camps for children from lower socio-economic families and CALD communities, (iv) jobs are mainly advertised through industry networks, word-of-mouth and closed social media groups, and, (v) a lack of marketing for the whole of the industry. Many aspiring employees learnt about the outdoor industry by chance through meeting other people who work in the industry (e.g., a neighbour, friend of friend).

According to one employer, a potential solution is to be more explicit about the different training, education and career pathways to enter and advance in the industry and to present this information at jobs and career fairs and expos as well as have discussions within organisations so that employees are aware of the professional development and career progression opportunities available to them.

Industry identity, collaboration & leadership

Fuelling the outdoor industry's public image and low awareness issues, analysis of the data indicated that the industry suffers from a lack of identity, with a number of factors feeding into this. First, **the industry is unable to form and communicate a clear identity or measure its value due to insufficient data.** This finding is exemplified below:

"I really struggle – what is the outdoor industry worth? Could you pull out a number for me? How many employees do we have? The fact that we can't answer basic information about an industry that we're all passionate about. It makes it very hard to actually make any meaningful change, because if we make change, how do we articulate what that change was?" P10, Industry expert

"The Marsden Jacob report [from 2016 and 2018] ... That was done in Victoria, then New South Wales and [nationwide] ... But Marsden Jacob report is the best thing that we've got at the moment, other than that, we've got terrible data. Which is one of the reasons that my argument is that we do a terrible job of arguing to the public broadly, about the value of outdoor [industry]." P12, Industry expert

Second, the industry is being identified inaccurately in broader reporting, if at all. For example, it was explained by interviewees that the current codes being used in national statistics (e.g., ANZCO) do not fully reflect the industry. **The implications of imprecise data are critical for industry advocacy, where a case cannot be built to apply for government support and funding.** Fixing these data gaps was proposed as a means to acquire a more comprehensive understanding of the scope of the industry to move forward. The latter finding is set out as follows:

"The ANZCO codes for the Bureau of Statistics and other applications in terms of employment data, and all those kinds of things are horrendous for our industry, because we're spread across so many different places that there's no way of being able to say what we're actually worth and what we do. There's not a shortage of

research around the health impacts of what we do. But it's, but again, it's kind of like blurry and grey in its boundaries ... levers that would transform our industry into the future... would be the identity lever, who is in our industry, if we could actually name that boundary and draw a line around that to say, 'we include this, but we exclude that', that would make a huge difference. And as an example, our industry currently does a pretty poor job of including retail, wholesale and distribution of outdoor equipment inside its boundaries, whether or not that should be in or out. Currently nobody knows" P12, Industry expert

"One thing that we're really bad at as an industry is advocacy. We are split into 17 different bodies or whatever it is. You've got camps. Tourism is split from recreation. We've got 7 different state bodies, so we're spending the funding we do get multiple times over just to keep the office doors open and not actually able to invest back in the industry because we've got a lot of operational overheads and we can't be strategic. I look at what an industry like the caravan industry has done. They have a caravan industry association where they don't just have the business owners, they have the trade supplies. So, if you supply wheels to caravans, you're a trade supplier, you've got the caravan manufacturers, you've got the caravan park owners, you've got the companies that supply towels to caravan parks for their cabins, their supplier, they're part of the industry group. So, they have made themselves like a \$20 billion industry group who gets access to government support." P10, Industry expert

Third, there appeared to be a lack of coordinated effort to address these issues, in part because the defining characteristics of the industry are contested due to the diverse forms of activity, settings and roles (e.g., educators, teachers, guides, tourism operators etc.) and purposes (e.g., for profit, education, recreation, welfare, health etc.). A number of interviewees felt that **the industry works in 'silos' and that infighting amongst outdoor industry leaders and operators, as well as negative narratives and internal dialogue, undermined the industry in terms of its own self-image and in turn, attracting and retaining talent.** Staff observed tension in leadership and believe some organisations are uncollaborative and unwilling to change. Some providers have found that graduates enter the industry expecting that they will only stay a couple of years in the industry, which is attributed to negative self-talk by industry professionals and trainers.

"My observations are there's lots of talk going on, and lots of people trying to work in silos and do their own thing, but there's not that much collaboration. Yet, they'll all talk about all the let's work together, but when it comes to the crunch, they go off and do their own thing." P37, Industry expert

"I think those things [e.g., industry advocacy] need to be presented as a unified front. I don't see that at the moment. One of my disappointments about adventure therapy is it seems to be getting further and deliberately isolating itself, from outdoor education more and more and I quite disagree with that." P27, Employer

Importantly, strengthened leadership and more collaboration between operators was proposed as a solution by a number of interviewees in the form a professional association for employees, solidifying and strengthening a national peak body, and more informal and frequent industry catch-ups:

“A professional association for outdoor leaders, would go a long way to addressing these issues by bringing the voice of the employees into the room, actually talking to them and addressing their needs. I know that a lot of minorities will agree that the important thing is actually having a voice in the room. I think that in the outdoor industry employees are actually treated as a minority, especially when it comes to these types of conversations ... it would be great to have an effective federal body that the Outdoor Council of Australia should be taking a lead on many of these issues at that federal level, we don't have an effective voice at the federal level. If I had a million bucks to make one intervention, that is where I would put it.” P12, Industry expert

“I feel like there's no real collaboration between the providers. I feel like the only time we all actually get-together and collaborate is when we've got the OV conference once a year ... the most important aspect of that get-together is collaborating and catching up and just speaking and getting updates from all of the other providers, including the smaller providers in the industry who are quite often overlooked when we look at those general meetings between those big organisations. I feel if we collaborate a little more, even just with having providers and training providers and anyone else that's sort of included in the industry, having catch-ups and collaborations ... on a much smaller scale, just for everyone to just get together, catch-up, talk about common issues, common solutions, things we can share ... Everyone is being extremely secretive around this industry, just keeping everything really close to them and their chest. I think if we just opened it up just a little bit and collaborated, at least with, "Hey, where's everyone's pressure points?" ... I think there's a way of having those conversations without laying your business model down on a table for everyone to see.” P8, Employer

External collaboration with the education system and other sectors was identified as a means to support the industry to establish strong structures and systems.

Partnering and working with universities was seen as important to generate research that could be leveraged to communicate the value of the outdoor industry to government and attract more support. Collaboration was also sought with vocational and higher education providers, internally and externally with industry, to enhance course pathways and to inform course design based on industry needs. One employer saw the advantages of building more relationships with universities by offering to present to students and provide mentorship, which in turn led to student internships and in some cases employment. Collaborating with other sectors was also seen as a way to promote positive ambassadorship across different industries. This would then lead to increased awareness, better understanding and improved image. The following quote encapsulates some of these ideas:

“So this is a question that goes to so many things. It's quality of training and education supported by the government, better cooperation with our partners in quality delivery of training, including that research communication, because if the government appreciate why it matters, and we're prepared, then we get better access to funding. So, I think it goes back to really good, collaborative approach to what we do.” P3, Employer

Another proposal to move forward was an industry-wide rebrand to address the industry's problematic public image and low awareness. Subsequent focus group discussions with employees in particular shaped this idea further and suggested looking at this process as a **‘reset’ to firstly address working conditions, but with the ultimate goal to foster industry collaboration and form and market a clear and unified identity.** Building a strong brand identity was seen as a way to attract skilled talent and industry support and funding. The quotes below exemplify some of these thoughts:

“The whole sector needs to band together and do a marketing campaign for a couple of years to really set expectations to highlight opportunities, to show people the growth, to show people the skill set that can be achieved through learning outdoor education, because it's so transferable ... It's all about a strong branding, rebranding for Victoria or Australia. I think New Zealand had done it well, parts of America have done it really well. They've really changed the whole perception of adventure tourism and nature play and nature outdoor ed on its heads. It turned into a profession and a sector rather than a bespoke little industry sort of thing ... I really think it comes down to rebrand. I've called it marketing but it's a rebrand of the sector. If we rebrand ourselves, not only to the government, not only to ourselves, not only to our training partners, to the private business, the big schools, to the mum and dad organisations, we get more people through the door that are interested in the sector because it's an amazing sector and we do amazing things with all our clients.” P2, Employer

“It's how you build the brand and the image and the reputation. Build the capacity so that it attracts good people and attracts good funding. So all of a sudden, the product sells itself because it's got a really good brand within the community. People want to then attach themselves to that brand maybe in a commercial sense, which then starts to generate the revenue that you can then reinvest back into the industry. So until we can do that, we sort of will just keep going around in circles.” P37, Industry expert

4.2 Staff attraction & retention

The intensive work environment and low employment conditions contributed to the outdoor industry's poor image as an employer. **The industry's structure and operating model (i.e., industry seasonality and precarious work, the demanding nature of outdoor jobs, a fragmented awards system, and a lack of a diverse employee base) generated negative outcomes at the employee and organisational levels.** These included employee demotivation, job dissatisfaction, emotional exhaustion, burnout, turnover, and labour shortages. As a result, most interviewees voiced the importance of meeting workforce expectations and improving working conditions to address chronic labour and skill gaps in the industry. Within this background, interviewees identified several inter-related factors that undermined the ability of the industry to position itself as an employer of choice.

KEY THEMES FOR STAFF ATTRACTION & RETENTION

Demanding work & burnout: The physically and emotionally demanding work, along with irregular and long hours, limited opportunities to rest with back-to-back programs, unpredictable weather conditions, poor group dynamics and lack of work-life balance are causing burnout within the outdoor industry. Significant amounts of time away from home and family, demotivated many participants, but particularly women with dependent children and other caring responsibilities.

Casualisation & job security: The outdoor industry is highly seasonal, and some employers do not offer ongoing work to staff. Businesses rely on casual and freelance employees, who are often under-employed and supplement their income by working in other industries. These employees fund their own requalification. The casual nature of the industry is a barrier for people entering the industry and is leading employees to transition to more permanent jobs.

Career progression: There is a perceived lack of career path opportunities leading to senior or management roles. Limited career advancement options act as an employee disincentive, causing experienced employees to leave creating skill shortages at the middle management level. A further disincentive is few professional development opportunities.

Awards & remuneration: Concerns were raised about low pay, volatile pay, differences in pay rates across employers, unclear or no information about pay, lack of recognition of work value and the marginalisation of casual employees. Problems with pay stem from the lack of clear award conditions and that diverse awards are applied. These awards are only partially aligned with the actual conditions of work and the work performed. There is contention within the industry about the role and value of greater unionisation. Pay issues are currently exacerbated in the context of post-COVID-19 skill shortages where there is intense competition between employers for skilled staff.

Demanding work & burnout

The first factor relates to the physically and emotionally demanding work demands in the outdoor industry. High job demands in the form of long and irregular hours, physically demanding tasks, limited opportunities to rest, unpredictable weather conditions, poor group dynamics (such as the involvement of inexperienced helpers and junior employees in school camps), and lack of work-life balance were reported. Here, several points can be made. To begin with, the combination of labour shortages, limited job resources and inadequate organisational support appeared to exacerbate those job demands and stress for employees, as exemplified below:

“Sometimes safety just didn’t seem as much the focus as it was to just do the program, get things done, be efficient, manage all of these things, but you’re not even getting four hours’ sleep. You would be in awful conditions. Sometimes you just were so ill prepared. You just wouldn’t get information before a trip. Then you’re literally put in a situation where... you’d be lumped with a group of kids who might have really intense, multifaceted problems, whether it’s behavioral, medical. You’re literally given that information in the moment that you see them. You have to, at some point, analyse all that information, have a bit of an action plan as to how you’re going to manage that.... The conditions you work in are really hard. I remember rocking up to a program where there were wind gusts of 60 or 70 kilometers per hour. My two co-workers had been setting up camps... in the rain in this gusty wind for like six hours or seven hours. One of them was just in tears, having a breakdown

because they didn't have the support. They had big marquees that had just flown away, and they were having to just deal with it. They were understaffed, but nothing was being done to rectify that. Then after that, those two people still had to go into a [multi-day] program for a week in those same conditions." P29, Employee

A considerable number of employees referred to experiencing burnout. In addition to those factors discussed above, staff attributed the following factors to their work-related stress: (i) exhaustion linked to advocating for more diversity and inclusion in the industry, (ii) the high level of responsibility for participants' safety, (iii) heavy workload with back-to-back programs and the physically demanding nature of fieldwork, (iv) job insecurity and extra administration associated with being a casual employee or freelancer having to find and schedule jobs, navigating differing company policies and procedures, (v) managing participants mental health, behavioural and medical problems, and (vi) working in extreme weather conditions. One solution proposed by an employee was for organisations to offer more professional development and job flexibility, enabling staff work across different parts of the business (e.g., from fieldwork to office-based administration and product development).

"Burnout is a real deal and we have a high turnover of staff. I was able to manage my own burnout because I spaced my programs out so that I'm not working back-to-back. But when I first started working in the industry, that didn't happen, I just wanted work all of the time, and there was a high need. So after three years of working out in the field full-time I couldn't do it anymore. I had to change roles. So I think that there needs to be better pathways for people to be trained up as somebody who works in the field as a group leader direct with direct delivery. Also coupled with the support of the potential of upskilling to admin roles and product development roles and having a balance of that. So I think there's some scope there for that running smoother and having opportunities for people to have different loads in different areas in an easier way." P6, Employee

In terms of leaving the industry, some employees needed to take breaks but returned because they are passionate about the work. Others felt that they have hit career 'ceilings' or 'roadblocks' and are looking to leave and find opportunities in other industries. Many staff move temporarily or permanently into adjacent roles with more clearly defined career progression options that still allow them to work in the outdoors (e.g., tourism, teaching). Others move to industries where their skills are transferable (e.g., service industries, education system, health care system, emergency services). Beyond burnout and work-related stress, reasons for leaving cited also included loss of work due to injury and visa challenges for international staff.

Additionally, the lack of work-life balance emerged as a barrier for staff retention. The nature of outdoor work required workers assigned to multi-day programs to spend significant amounts of time away from home and family. In turn, this demotivated women with dependent children and other caring responsibilities from returning to work after

experiencing motherhood. It also appeared that male workers faced covert pressures in managing their work and family obligations:

“I get the opinion that if you asked for parental leave, as a man in those industries, some of the smaller employers would probably laugh at you.” P14, Employee

One employer further remarked that work-life balance considerations were not confined to workers with family commitments, but employees generally were attracted to roles that did not necessitate overnight stays. Unfortunately, as supported by the survey findings in Section 3, such roles were said to be scarce:

“Most people looking for ongoing work are also looking for work where they can go home every night... especially if you have a family or a partner... or you might have other commitments, pets, children, there’s so many things that stop you from being able to go away for five days at a time... people are looking for some sort of work, that’s more like a nine to five... this balance can only be offered by the hard top camps because there’s no overnight required for that kind of work, but then there’s not as many of those in Victoria because journey camps are much more popular, especially with secondary schools.” P8, Employee

Nonetheless, some interviewees were of the view that roles with traditional working times were available, provided that employees were made aware of these opportunities and were willing to move across sub-parts of the industry.

Importantly, numerous strategies were proposed to address the above-mentioned challenges. Amongst these feature: (i) the implementation of mentorship and communities of practice as key support mechanisms for women employed in outdoor workplaces; (ii) providing voice to employees to facilitate meaningful and inclusive conversations; (iii) undertaking strategic workforce planning and allowing personal downtime in-between overnight trips, thereby safeguarding employees’ mental health and wellbeing; (iv) providing people management and mental health training to managers; (v) establishing clear career pathways for employee advancement through continuous training and professional development; and (vi) more broadly, fixing the data gaps to acquire a comprehensive understanding of the scope of the industry.

Casualisation & job security

Many parts of the outdoor industry are characterised by highly seasonal patterns of work with high and low periods. Employers therefore find it difficult to offer ongoing work to staff when there is little or no demand from clients for programs and camps during certain times of the year. Some locations are more seasonal than others depending on the climate. As a result, **many casual or freelancer employees find that they are under-employed at certain times throughout the year and need to supplement their income by working in other industries, such as tourism and hospitality.** While some employers would like to

offer more permanent roles to staff, lower and/or fluctuating demand from clients has led some businesses to rely on freelancer and casual employment contracts. The combination of high workforce casualisation and lack of secure work deterred employees from either joining or staying in the industry. This finding originated from employers, employees, and potential candidates. In the words of one employer:

“Attracting good talent is challenging enough, let alone them not having security themselves. That’s a big part of the give and take, to give them security so that they can put their full effort into their work and not be worried about what’s going to be happening next week or not getting hours.” P5, Employer

The casualisation of the workforce meant that many staff have insecure and sporadic work with no leave entitlements. Further, it means they bear the cost of their requalification required by the employer:

“If I’m a casual employee, there is no requirement for that [costs relating to the renewal of first aid qualifications, working with children checks] to be borne by the employer. As a business owner, they would say, ‘Well, why should I pay for that when you’re using that qualification across five different employers? I’m not seeing the full benefit, why aren’t they chipping in?’. So, by the casualisation of the workforce, that means that those costs are borne by the employee, and it causes all these things where the employee is worse off.” P12, Industry expert

However, differences regarding the industry’s attractiveness were noted across groups. It was suggested that **young workers, especially those without financial commitments, are more likely to engage with the outdoor industry, which provides them opportunities for fun and varied experiences (i.e., different activities, destinations, venues and travel). In contrast, workers with caring responsibilities and mortgages generally prefer stable income streams and are therefore more likely to try to transition from frontline positions to office-based roles or exit the industry altogether.** Similarly, it was reported that individuals from CALD backgrounds value stable and rewarding careers, hence their lack of attractiveness to the industry as a career preference. This finding is illustrated below:

“I can speak to the Chinese culture and Indian culture and why people from those areas may not be joining this sector as much. With regards to those communities, they’re very academic-driven... For them, it’s about having a stable life in a good occupation... and white-collar jobs (like doctors, engineers, architects) ... A fair bit of that has to do with not understanding what the progression might [be] or what the opportunity is [in the outdoor sector], because at the end of the day, people from those backgrounds want stability, because they’ve not seen it as much” P9, Employer

While conceding that casualisation can present its own set of challenges, one mature-aged worker still expressed some satisfaction with this form of employment as it allowed them to access a variety of different work opportunities:

“I’m not used to being a casual employee because I have had an odd 40 years of constant permanent employment. Being used to the insecurity of the casual workforce is a little bit unusual for me... But I’m not in a situation where that should really bother me now. I can afford not to work... I love the variety of work that I get by having multiple employers” P26, Employee

To improve conditions for casual and freelance staff in terms of permanency of employment and access to finance, one industry expert proposed the idea of a holding company, where a group of employers across the industry would agree to have an entity hold staff on a permanent basis and employees would move across different organisations based on the availability of work. Further details regarding how this would work in practice are provided below:

“What would have to happen is, a number of employers across the sector, would have to buy in to that idea and then form a holding company. So that holding company would then hold the freelancers and casuals on a permanent basis. Each one of them would have a job plan for the year. We’re going to work for X for that many months, then to the ski industry, so you might have all the four main ski resorts locked into this as well. Then you go to that rafting company on the Snowy. So you basically have to have a heap of companies buy into it, tip money into it, to then know that for the long term future of the industry, dishing in a bit to have a particular person or people managing that programme would mean that they’ve got a couple of 1000 of people that are a whole lot less likely to leave the sector, rather than resigning to the fact at the moment you might get two years out of every one that we bring into the sector, which is ridiculous, not sustainable.” P1, Industry expert

Career progression

While there appear to be many potential career pathways across different types of organisations (micro to large), roles (e.g., group leader, activity provider, outdoor education teacher, program coordinator, logistics, human resources) and sub-sectors (e.g., outdoor education, outdoor recreation, outdoor therapy, commercial aspects such as tour operators and retail sector), many employees experience that there is little career progression into more senior roles. **Limited upward mobility emerged as a disincentive for employees.** Mixed findings regarding career progression opportunities were, however, reported. On one hand, some interviewees elaborated on how the limited career advancement options in the outdoor industry prompted employees to pursue opportunities in other industries once they were ready to take on additional responsibilities and step up the career ladder:

“I would be interested in seeing the ratio of entry level roles, mid-level roles, senior manager roles, and owner in a business. How the ratio of those roles in the outdoor

industry and tourism industry compares to other industries? Because I know in the corporate world you might have a for every five entry level roles, you've got three to two to one. I think it would be more like 1:50 in the outdoor sector because I think there's a lot more guiding roles than progression. So if you don't give people progression and pathways within businesses or within the industry, their skills will get recognised from outside of industry. For me, I love hiring outdoor guides. I know the skill sets that they have are brilliant in our workforce. A lot of outdoor guides go into things like emergency services because of their leadership skills, risk management skills, dealing with stressful situations" P10, Industry expert

On the other hand, one participant indicated that the exodus of young workers from the industry creates significant talent gaps in middle management positions. This strips the industry of valuable mentors, thereby accentuating workforce turnover issues:

"We've got a lot of people that are very fresh to the industry, and that personally love doing it. And that's why they've just gotten into this industry. And they're just finding their footing in what this means as far as a career. Then we've got people that have stuck around for a lot longer. So, we've got the people in one to two years of experience, and we've got people in the five plus years of experience. But we are really missing the conversion between the two... So there's definitely a gap in our industry collectively, that we're struggling to fill with those really important key players that mentor people that are just getting started and that support the people that have stayed for a while" P3, Employer

Ongoing professional development of existing employees was also highlighted as a challenge (discussed more in Section 4.4), especially for micro and small businesses. According to one industry expert, one way to guard businesses from a deskilling workforce is through the establishment of Central Hub of Skills where economies of scale and consistent messaging around professional development can be achieved.

Awards & remuneration

The fourth factor pertains to the remuneration structure of the industry. Key concerns raised by interviewees include: (i) low compensation, (ii) income volatility, (iii) significant pay differentials across employers, (iv) the lack of recognition and pay for the full work effort needed to deliver on place-based learning outcomes of programs, (v) and the marginalisation of casual workers in terms of their inability to recover certain job-related expenses, thereby negatively impacting their take-home pay. The following quotes exemplify some of those concerns:

"Hours would be 24/7, I'm assuming. For a week or a few days [at a time]. I'm not really sure about the pay, but probably not as good as what I'm getting at Coles, to be honest." P22, Aspiring employee

"I'm not meaning to sound selfish, but it's just something that comes up a lot for us is pay... It's really hard to justify doing the really long hours and traveling around so much to not be paid your worth... It's just frustrating... As an outdoor educator, you want to research and you want to plan place-based lessons and learn about the area you're going into, and we're not getting paid for that. And that's hours out of our weekend." P13, Employee

These challenges were found to be symptomatic of a broader employment regulation issue around award classification. As reported by one interviewee, the outdoor industry is large and complex and embraces a wide variety of jobs. The diverse roles can fit multiple award categories such as retail, fitness, health, and miscellaneous award rates. Employees at private schools under the teaching award reported having more job security as they are more often employed on permanent contracts with higher wages. The absence of a dedicated industrial award to govern the minimum terms and conditions of work was said to create vastly different pay rates and subjective employer interpretation of job conditions:

"Why aren't we retaining staff? It's the pay and conditions. One thing we are still fighting is to get recognised with Fair Work... there's not an award wage for the outdoor industry... If you're running an outdoor education trip where you're at camping for a week and you're hiking, you work 7am till 10pm at night and you're still out in the field in the tent with the kids till 7am the next morning. You're still expected to respond to all of these things [customer demands], and I don't think our pay and our economic model for the outdoor industry actually supports that because often staff are out in the field, they're not allowed to have a beer. I use the beer test as 'Am I allowed to have a beer?' Because if I'm not, you should be paying me. We've got that economic gap that we're probably not paying our staff enough for what we're asking them to do." P10, Industry expert

High workforce casualisation and poor working conditions and remuneration has built and reinforced a common culture of loyalty to the industry, but not the employers, as people move around the industry constantly. This is illustrated by the following aspiring employee:

"I'm kind of planning on using [one of the large employers] to get trained up really well, because I've heard they train really well. And then outsource and move to a private school or something who pay a bit more, because I feel like I can't go to a private school right now because I don't have any real qualifications." P22, Aspiring Employee

It is unclear to prospective employees which award an employer is using and the only way to find out is to request this information from the employer or by relying on advice provided by friends and contacts working in the industry. Several aspiring employees mentioned that they did not think jobs existed in the industry as they could not find them on mainstream online employment marketplaces, such as Seek. Others in this respondent group were

uncertain of the industry's or organisations' pay rates, but thought remuneration would generally be low, based on word-of-mouth. More clarity around working conditions and wages is sought by prospective and current employees, as well as more detailed job descriptions. Several employees wanted employers to publish their pay rates in their job ads to provide transparency across the industry.

"I found it a little bit hard to wrap my head around the pay structure. Obviously because there are various roles, that you know, depends on if you're a trainee or if you're full time employed and then if you're I think it's a camp leader or journey leader or expedition leader. So there's different pay structures and also when you're in the field. I just couldn't get my head around how it all works." P33, Aspiring employee

Many employees believed that the various awards used are not appropriate for their roles nor meet the needs of the industry because they do not take into account the distinctive nature of the work and multi-day programs. Both employers and employees would like to see a more consistent approach around conditions in the industry. Participants shared different views, however, on how to achieve this. While some industry experts and employees support an award or industry-wide bargaining to establish a baseline, others voiced concerns that this would not offer the flexibility required by the dynamism of the industry and self-regulation through industry collaboration would be preferred. Some participants were in favour of a unionised approach, whereas others advised against what they described as an adversarial approach and instead emphasised the importance of having a professional association lead industry changes. One interviewee explained how modifying the 'miscellaneous award' to embrace multi-day programs may address the pay issues for employees working in multi-day programs. Some of these views are outlined below:

"The [outdoor industry] award would be super handy for everyone to have a base level understanding. Sure, people are going to pay overs at times, but to have a base level understanding of an expectation of what the employee can have, I think helps them understand the worth and what the value is and also the employer ... It gives a base level understanding. There's no baseline at the moment. You reach out with employers and employees, and it is wild the difference in what someone can get for a day's work or three days work. It's incredible. I think that's definitely top of the priority list." P41, Industry expert

"I believe a unionised approach across the whole industry needs to be undertaken with working hours at the forefront. Too often employees are caught out working extended hours with no reimbursement. The employers that are leading the field with appropriate conditions are top private schools, but this approach should be taken by all companies. Consideration needs to be given to higher levels of supervision and responsibilities with often young and untrained staff given high responsibilities with only a single field manager taking all responsibility." Employer, Survey respondent

Competition for staff recruitment has increased, especially post easing of COVID-19 restrictions. There is a perception that some businesses are compromising on minimum standards and paying higher price-per-day salaries to attract staff. This is leading to unrealistic and unsustainable pay expectations and staffing issues where freelancers/casual employees will wait to the last minute to sign contracts because they will be paid more:

“Historically, you would sign up for a programme for the year. Now, it's turned into the Wild West of who can hold out the longest because they know the longer they wait, the closer to the programme, the more money someone's going to pay them because there is a lack of staff in the industry. It's turned into this bidding war of the Wild West, and no one commits in advance because they get the lowest rate. Whereas if you hold out to two days before, someone's going to pay you danger money to jump on the trip.” P41, Industry expert

Some interviewees issued a note of warning around the unintended consequences of pay increases in the industry. It was argued that increased labour costs would make essential outdoor programs such as school camps too onerous and hence inaccessible for low-income and marginalised communities and schools. Furthermore, external influences, namely the increased cost of living pressures, risks of recession, and recent changes in the leave entitlements of public-school teachers, were said to further threaten the demand for outdoor experiences:

“There are people shouting loud and clear that the only way to look at awards is to pay a certain amount per hour, because in their world, a 9-to-5 is all they'll ever have to deal with. Now, we still want to pay per-the-hour, but it has to be applied very differently... If an award came in and we had to double our daily rate just because there's no compensating factors, we couldn't afford to operate. No school would pay that amount. Prices have skyrocketed over the last three years and clients still want to pay the same amount they were paying in 2018 per person per day.” P2, Employer

“Because of the time in lieu system that has been brought in for school teachers... meaning if a school camp happens, and this is just the public school sector, teachers actually get time in lieu for every single hour... what it means is that a lot of schools are not doing camps anymore, or they are on a limited budget. And so they are outsourcing to outdoor education companies a lot less. The public school sector is a big market for them [outdoor education companies]. And so there is a direct loss of income. When there's a loss of income for businesses, then they obviously can't pass that on to higher employment wages. Also as a country, we're hitting a bit of recession. Tourist numbers are lower. And then the tourist numbers that are out here aren't spending as much per capita. And so again, there's less opportunities for employees to pick up more work. That puts business into a careful mind frame.” P11, Employee

The above line of argument was, however, disputed by a handful of interviewees. While acknowledging the importance of pricing outdoor programs reasonably to promote inclusive and accessible experiences, one participant stated:

“Another common argument is, if employees were actually paid for 24 to 48 hours that they’re on program, at the rate that the current award says, then people who could be experiencing the outdoors would be priced out of the marketplace. And my argument is that this is an endemic problem of the industry to fail to communicate its value...it’s not the job of employees to take a pay cut in order to subsidise outdoor programs. It’s the job of the industry to educate the community about the value of outdoor programs, so that they’re willing to pay what they’re really worth.” P12, Industry expert

As a final note, the data revealed tension points between workers’ desire for financial prosperity and their intrinsic motivation. Despite their low earnings, employees still valorised the opportunity to work in a profession that facilitates connections with nature and delivers meaningful outcomes, both personally and towards the wider community:

“I’ve just always loved the outdoors, nature, sharing the love of it... That’s why I want to be an outdoor educator: to actively create bonds between nature, the natural world, wild spaces, and people so they can actually care and respect and look after them, particularly moving forward with climate change” P14, Employee

However, the above finding should be interpreted with caution. It does not suggest that some employee groups are more intrinsically motivated than extrinsically motivated. What it indicates is that although employees are passionate about the outdoor industry and are not in it for the money, they still need fair wages for survival. In other words, their desire for financial security and benefits can be rated as high as their intrinsic motivation and passion.

4.3 Diversity, inclusion & accessibility

The interview data revealed additional barriers for minority groups to join and stay in the industry. Amongst these feature issues discussed previously, including the perception of the outdoors being a place to be feared for some cultures, as well as the lack of understanding and exposure to the outdoors for some CALD communities and people from lower socio-economic backgrounds. Other key barriers identified in the analysis concerned the absence of diverse voices at the leadership level and lack of inclusive representation in marketing and communications about the industry. The minimum educational threshold and associated educational costs also make the industry less accessible and attractive to people from lower socio-economic backgrounds, international students and refugees.

KEY THEMES FOR DIVERSITY, INCLUSION & ACCESSIBILITY

There are clear and strong employment barriers for minority groups to enter the industry. There is a lack of diversity in leadership positions and little representation of diversity in industry communications and marketing. The minimum educational threshold and associated educational costs also make the industry less accessible and attractive to some people with diverse and lower socio-economic backgrounds.

Women are increasingly employed in the industry but remain underrepresented in senior roles. Sexist attitudes, sex-based harassment, gender-based bullying and the poor alignment with care responsibilities create barriers to staying in the industry. Menstruation and menopause are also difficult for female staff to manage during field trips.

CALD community members can be presented with additional barriers to join and stay in the outdoor industry, including visa restrictions, the perception of the outdoors as unfamiliar and/or unsafe for some cultures, and discriminatory work cultures.

LGBTQIA+ community members are increasingly represented but there is a need for diversity and inclusion training for employers, managers and staff to build inclusive and welcoming work cultures and encourage retention.

Body diverse people are discouraged from entering the industry due to a pervasive stereotyped image of what an outdoor employee should look like. Industry practices such as 'slow outdoors' and 'lead from behind' and wider representation of people of diverse body types need to be adopted.

People with disability are marginalised due to perceptions of risk and cost associated with their inclusion. There is a need for greater adoption of inclusive practices by employers.

First Nations people are underrepresented in the industry due to employer hesitance to successfully and appropriately identify, access and engage with First Nations people. There are concerns about tokenism as well as differences in philosophy of working in the outdoors. Issues relating to pay and conditions also apply to first nations workers.

Overall, increasing diversity requires structural change led by organisations, educational institutions and peak industry bodies.

There appears to be very little cultural diversity in the outdoor industry. One employer estimated less than 5% or even 1%. The casualised nature of the workforce makes it difficult for international aspiring employees to find work due to visa restrictions. Most aspiring employee who are students found that their course had little cultural diversity. Language is a barrier due to the importance of communication in many of the roles, although speaking another language is valued to provide translation and interpretation for international clients.

Many employers expressed that they value diversity in their workforce, however, there appears to be low engagement, attraction and inclusion of people with diverse backgrounds in much of the outdoor industry. There is also an economic interest in diversifying the workforce in part because clientele are increasingly diverse and there is client demand for diverse staff. There was some indication that employers with family-oriented cultures adopted a caring employment approach, which translated into higher engagement with workers with intellectual disabilities. Many employees believe structural

change is needed to address the lack of diversity and inclusion in the industry and that this should be led by organisations, educational institutions and peak industry bodies.

Education and training providers played a key role in setting the scene for new entrants in terms of their understanding of diversity, inclusion and accessibility in the industry. Some aspiring employee students found that their course did not include any First Nations learnings; others felt the inclusion of Indigenous education was a strength of their course and highlighted the importance of having First Nations educators deliver this content. There were mixed student experiences in terms of diversity, inclusion and accessibility course content, which varied from being a central focus to not present at all:

“Everything we were taught was also focused on how you can include people with a disability, whether it be physical, mental or otherwise. It was totally about making it inclusive. I enjoyed that part of the course and thinking of ways to make it inclusive.”

P24, Prospective employee

“I feel like in my training course, Cert IV, we talked about lots of things, but we never talked about diversity, or different barriers for students and colleagues that might be in place in terms of disability, diversity, skin colour. I think there's so much space to talk about those things in a TAFE course, like I did. Even in a first aid course, which I feel like is a part of outdoor education training, your description on if someone is unwell is 'pale, cool, clammy'. Descriptions of skin texture and colour and skin colour change on how to judge a person's state is only for people with white skin.” P25, Employee

Women

There appears to be a greater proportion of women working in entry-level and mid-management positions than in senior roles. Women are also seen to have better soft skills. There is largely a lack of female representation, however, in senior management and leadership in the outdoor industry. In terms of gender-balance in courses, some aspiring employee students found that their classes were male-dominated, whereas other found it was relatively balanced. One employer found that the gender ratio of new entrants fluctuated with every graduate cohort.

While many employers and employees do not see barriers for women, some women spoke of gender-specific challenges related to caring responsibilities as well as discomfort related to their menstrual cycle or menopause working in intensive physical activities and/or multi-day programs. One participant also expressed regret that women's physiological needs were generally overlooked by the industry:

“From a female point of view, I can't really think the industry considers and respects a woman's menstruating cycle, and in the weeks that they move through. Unless you're able to choose when you get out in the field and work to best support yourself, then I think it's a really hard industry to work in, as a woman who's trying to move with their cycle.” P13, Employee

Moreover, there was some indication that **female workers experienced additional challenges, particularly considering the highly masculine outdoor workplaces**. Of concern, reports of gender-based bullying and sexual harassment emerged from the data. Female workers from CALD communities appeared to face an extra layer of discrimination based on both gender and ethnicity. There is a perception that many women leave the industry when they want to have children due to a lack of flexibility and work-life balance in the industry. The casualised nature of the workforce means that parental leave is not available to many staff.

Research participants signalled that misogynistic and sexist attitudes still exist in the industry and several female interviewees spoke about experiences of uncollaborative and/or inappropriate behaviour and even harassment from male colleagues or clients. A number of women did not feel supported by their employers when dealing with such challenges, such as the following employee:

“I don't feel supported or empowered to have conversations with people about unfair treatment or unfair comments, I definitely did not resonate with and definitely I'm much more likely to stick around if I feel like I can have that conversation. In particular, I would probably say, more often I've experienced that as a woman, as opposed to a queer person. I've had multiple conversations or had multiple scenarios where co-workers or male teachers thought they knew more and better and would over-step without collaboration. I didn't really feel fully supported in trying to manage that or just feeling like I could draw a line where that's not on.” P28, Employee

LGBTQIA+ community

While there appear to be more people in the workforce that identify as LGBTQIA+ than other minority groups, one interviewee thought that this was a coincidence as opposed to an active effort by employers to recruit and support this group. One interviewee experienced inappropriate language and jokes about people who are gender or sexuality diverse. To help address such challenges, they suggested diversity and inclusion (D&I) training for employers, managers and staff run by a provider with appropriate expertise. This would also transfer the responsibility to educate employers and staff onto organisations and leadership, removing the misplaced pressure on staff that identify as LGBTQIA+ to provide this education themselves:

“My current workplace had diversity training at the start of the year, but run by a trans person who works in outdoor ed. The older people that work at this workplace had lots of very confronting questions for this person. Having space to ask those questions was triggering for some people at the workplace. It was an open space to talk about those things. Definitely at this workplace [it felt it was run in a good way]. Previous workplaces probably would benefit from that hugely, because after jokes were called out, they didn't really know how to handle that. They were asking me how to handle that. I think that's great in one way, but also putting a lot of responsibility on someone who's a part of that community to educate them when I think it's their

responsibility to educate themselves. The training that we did do was awesome. It was great. I think everyone should do it.” P25, Employee

Body diverse people

Body diverse interviewees perceived barriers to studying and working in the outdoor industry largely due to a lack of representation across industry advertising and images in the media and social media more broadly. To address this issue, not-for-profit organisations have been established to encourage people to get involved in the industry regardless of body size, speed and ability. Inclusive practices include pacing the activity to the slowest person and having the facilitator lead from the back of the group so that no one is left behind. The excerpts below reflect these views:

“If you think about the people that are normally in the outdoors, there's a bit of a stereotype of people that you're seeing in the media and all of this. They look a certain way, and they dress a certain way. There's not as much representation of people like me in the outdoors. So, camping or kayaking. We've got people that do multi-day hiking, pack and carry, all these awesome things, because we're all capable of doing these things. We just might be slower. Or sometimes we're not even slower. Sometimes we just live in bigger bodies.” P40, Volunteer

“Our leaders always lead from the back. So no one ever feels like they're behind everyone else. We pace it to the slowest person, and that was always so important because even me, I've always been super adventurous over the years, but I've always been one of the slowest people. That feeling of being at the back and you feel like everyone is judging you. ‘Ohh, she's so slow. What's wrong with her? She's so unfit’. Everyone else has got to the top of the hill and you get there and they go ‘Ohh. Now let's go. And I'm like, but I need a break too’.” P35, Employer

People with disability

Most employers and employees were not aware of working with people with a disability, indicating a low level of inclusion and accessibility. There is a perception that risk management presents a barrier to some people with physical or mental disability for certain outdoor activities that require a high level of physicality or responsibility for participants' safety.

For a number of employers, cost was seen as a barrier to increasing the accessibility of sites (e.g., redeveloping sites with accessible facilities, bathrooms and ramps). There were also difficulties in employing people with physical disabilities as field staff, for example, in terms of liaising with Parks Victoria to create wheelchair-accessible routes. **While some activities and journey-based programs presented challenges, office-based roles and some hard-top camps were seen as accessible and presented job opportunities for people with disability.** The quotes below reflect these sentiments:

“There's a lot of hard top camps in Victoria that are really accessible to people with both physical and intellectual disabilities, where high ropes courses have been

modified, giant swings, all that sort of stuff can be modified for almost anyone with a physical disability. But if you look at journey type programs, it gets a little more difficult to make it accessible. It's something we've been looking into as well, how do you make these kind of programs wheelchair accessible. You need specific tents, you need to make sure that the paths that we want to bush walk are even and level and not too steep, all those sorts of things. So, it can be quite difficult to make those sort of remote journey programs accessible to people with physical disabilities, especially if parks haven't made paths that are wheelchair accessible, because there's a lot of things that we can't do ourselves, we can't just go into the national park and just pave out a path for a hiking trail, you know, it has to already be there." P8, Employer

"There's a lot of administration and compliancy work that is required by every single company. There is policy writing, there is ordering, there is warehouse management, there is driving, there is logistics, there is food packing, there is gear maintenance. So, there is a tonne of work that is part of the outdoor sector that is not holding a rope and being in charge of someone's life." P3, Employer

Employer practices that supported inclusion and accessibility for people with disability included: (i) offering neurodiverse staff additional time before the start of a program to ensure ample opportunity has been provided for employees to ask questions and seek clarification, (ii) encouraging staff with a disability to bring a support person with them to work, (iii) providing opportunities for interested staff with a disability to provide basic training to colleagues, (iv) inviting clients, schools and parents to visit sites to assess their suitability, and (v) modifying facilities where possible (e.g., accessible bathrooms, ramps high ropes infrastructure).

First Nations people

Attracting, recruiting and retaining First Nations employees also ties back to the pay and working conditions in the industry, however, one Indigenous interviewee feared that First Nations employees could feel as though their employment was tokenistic if they were the only person with Indigenous heritage. The tension between financial and altruistic motives appeared to be more pronounced for some First Nations individuals. This finding stems from one First Nations employee who explained how they could earn high wages working as a freelancer, but viewed it more valuable to share culture with other communities and reduce stereotypes around First Nations people:

"If I want to do this on my own, I can be charging, for a cheap thing would be \$1,200 a day. I could go as high as \$2,500 a day. That's probably one reason that not many First Nations people get in with an organisation. Go out on your own and you earn far more money, but I was taught by Uncle and Auntie and everyone, it's not about the money. You need enough money to live on... with everything that's going down at the moment [cost of living pressures]. But it's not about the money... It's about teaching people. It's about educating. It's about letting people understand that black fellas are smart, have a lot of knowledge, and we've got a fairly good idea what we're talking about." P36, Employee

One First Nations employee would prefer to follow Aboriginal belief systems when it came to recruiting and training an Indigenous 'apprentice', who would traditionally be selected by the Elders and then taught by an Aunty or Uncle who had permission to share this knowledge. Another Indigenous employee explained that some First Nations people may not be aware of their mob or even their Indigeneity and having systems in place (e.g., linking employees to professional development opportunities such as training and/or mentorship) would support staff to bring more cultural awareness into their practice:

"I'm an Indigenous Australian myself and I haven't received any sort of encouragement within the training space or in a workspace to participate or explore that, unless I specifically sort it myself. So, I have a large amount of cultural awareness within my practice, that I do bring to work and training, but actually, specifically, having a space that that is drawn out and encouraged and appreciated, hasn't really been there as a whole across the board, for me, in this industry ... I think that's a missed opportunity. If companies can actually open up to the idea that there's going to be people coming through that are their employees that are on their own journeys that might not know they're Indigenous yet or might find out they're Indigenous throughout their own personal journey and to have those pathways ready and open for them to explore. Build those connections. Could be quite beautiful. Then build that organic connection to those companies." P38, Employee

Other solutions to engage, attract and retain more First Nations people in the outdoor industry workforce included building connections with Elders, respecting practices to connect to country (e.g., allowing personal time before/after programs for staff to connect to country, always practicing Acknowledgement of Country), involving Indigenous staff and connections within companies to advise and/or lead on planning and policy development (e.g., Reconciliation Action Plans), as well as having strong support networks for Indigenous students in TAFEs and universities. Some of these ideas are exemplified as follows:

"It's going to take a while to get First Nations people into it [the outdoor industry]. They need to look at it as a specialist position [cultural officer] ... If you just want to get people into the general, group leaders and that, they need to 1) go through schools and 2) get to know and develop those relationships with their Elders ... going into communities and getting to know the Elders, developing a relationship with them, seeing who they'd recommend, because they might have someone who they would think would be perfect for the role. Then they could support that person into doing that." P36, Employee

First Nations knowledge and practice are seen as strongly linked to the outdoor industry. While some providers would value having First Nations employees, they are not being approached by First Nations people for positions; other providers perceive that companies are somewhat apprehensive of Indigenous practices:

I think barriers to entry around First Nations would be around the cultural differences and the risks around First Nations people having other pressures on them on their activities, as in sorry business and other family things that come before work and business. I think that makes companies a little bit wary... I think there's opportunities opening up for First Nations people quite quickly, and that will continue to expand in the coming years. P5, Industry expert

Some providers find it challenging and do not know how to successfully identify, access and engage with First Nations people and communities, suggesting that company-wide cultural awareness training is required to help build better connections. As a result of this lack of knowledge, some engagements with First Nations people were found to be limited in depth, as outlined below:

"Major barriers to that [engaging with First Nations communities] is access. It's incredibly difficult in so many parts of Australia to even identify who are the custodians of the land, how to access them, how to talk to them, what they can deliver, what they want to deliver, what they will deliver, that's incredibly difficult ... then the engagement has seemed to be very limited in its spectrum, that it tends to be very restricted to a Welcome to Country or an Acknowledgement of Country, but not necessarily much more depth than that." P3, Employer

Resources are available to help organisations make contact with their local Aboriginal community, including the ACECQA (Australian Children's Education and Care Quality Authority, n.d.) guide to engaging with Aboriginal communities. **This finding suggests that further training and education is required to improve company and management understanding and skills in terms of engaging with First Nations communities.**

Another potential barrier for First Nations people to join and work in the industry was thought to stem from differing relationships to the outdoors, with the onus on employers and companies to connect and engage with Indigenous communities to understand their approaches better, as suggested by one employer:

"Aboriginal Australia has got such a strong connection to country, but I think it is in a very different ... the Western mentality is about conquering nature ... how I use the outdoors, as opposed to Aboriginal and First Nations, Torres Strait Islander, which is about how you connect with the outdoors, and how do you live in harmony in the outdoors. It's a lot less about what you gain from it ... that's a core difference in how we're approaching the outdoors, potentially at the core of why [First Nations] people are not necessarily engaging in outdoor recreation the way that Western society engages in outdoor recreation and that's why they're not necessarily part of the workforce. However, that's something that we can take ownership of and have better accountability for in reaching out to First Nation people and starting to understand how they are going after the land and starting to pass on those stories ... learning to

participant and engage better with First Nation people to deliver content and support the delivery of adult education programmes.” P3, Employer

Diverse, inclusive & accessible practices

Solutions were proposed on four levels – individual, organisational, industry and whole system level. First, on an individual level, a white, male interviewee refused to accept a position on an industry board if it meant that another candidate from a minority group would not be represented. Other employers and industry experts offered mentorship or encouraged staff from minority groups to apply for roles or promotion. Another interviewee highlighted the importance of inviting speakers with diverse backgrounds to present at industry conferences and workshops.

At the organisational level, it was felt that organisations need to firstly acknowledge that there are diversity and inclusion problems in the industry and then have clear, company-wide policies and all-staff training to hold businesses accountable and to support staff. Other initiatives included: (i) diversifying organisational leadership and staff and forming committees and working groups to address diversity and inclusion issues, (ii) having systems in place to connect staff from minority groups, such as a mentorship program, (iii) protecting staff by using a code of conduct so that clients are contractually obliged to behave appropriately and treat outdoor staff with respect and dignity. The following quotes exemplify some of these thoughts:

“I would really encourage more businesses to work on that diversity and put policies into that. I think overall that most companies have gender policies, whether that's meeting set quotas and also set quotas in management levels. Then on diversity quotas, as well. It always seems hard when you have got to put it into policy. But if people don't put it into policy, then no one's held accountable to it and don't encourage it. I'm very passionate about that in my workplaces.” P11, Employer

“I think also people having clear policies about where they [organisations] stand with a lot of these things like minority groups in particular. Are you an organisation that prioritises inclusive practice around access? Or are you not? Some people seem to really want to be but then their policies don't seem like they reflect that in supporting their staff to make good decisions and feel supported and backed in those decisions.” P28, Employee

“A lot of companies now have a diversity person allocated as a leader for the diversity inclusion space. I really think it needs to be a diverse leadership, body and group. It shouldn't just be up to one person to identify with all marginalised people, causing more issues because that one person has to be an expert for all types of people. That's very, very difficult. It's great to see companies are putting money into trying to be diverse and inclusive, but by allocating it to one role is still segregating that diversity. I think it's very important that we actually show that representation through the entire leadership.” P38, Employee

Third, at the industry level, more immediate priorities included having diverse representation on industry boards and developing and marketing the professional image of the industry to

remove the perceived lack of prestige for family members to see the industry as a viable career option. Another was for further development of 'toolkits' to help assist outdoor providers to be more inclusive of minority groups. A key suggestion included forming strategic partnerships (e.g., Vic Health, Parks Victoria and Outdoors Victoria) and applying for funding to develop programs to introduce the industry to different groups, build relationships and showcase jobs and careers in the outdoors. Outlined as follows:

"I want to keep looking at how do we diversify and become more inclusive and how we might partner up with someone and we might run some Indigenous camps and camps for low socio-economic families that can't afford to send kids to camp, that there's a programme where it can be funded through whatever the programme is to get more of them to go on camp. I think there's lots of opportunities. It's just about getting the right programme and the funding model to be able to deliver it. I think as a whole the outdoors industry is not a very financial industry where they can afford to put those type of programmes in place and cover the costs. They'll need to partner with a funding partner to be able to deliver that." P37, Industry expert

Finally, whole system approaches included both more immediate and longer-term actions, from involving/ consulting representatives and staff from minority groups when writing plans, policies, strategies or initiatives that concern them, to adopting new models/ approaches/ frameworks that focus on well-being (as discussed earlier). For First Nations engagement, building trusted relationships with Elders and communities was seen as vital, as well as initiatives to attract younger First Nations people, such as student scholarships to attend courses with gear and travel allowances for Indigenous people from remote and lower socio-economic communities and have strong peer support networks in TAFEs and universities.

According to various employees and aspiring employees, **positive experiences of the outdoors in early childhood (e.g., camping with family, school camps, studying outdoor education) led them to an interest in the outdoor industry and profession.** Yet, as outlined in the background section of this report, there are barriers to young people accessing and experiencing the outdoors with many public schools with students from lower socio-economic backgrounds not offering camps or outdoor education as a subject. Schools are also shortening or cancelling camps due to increasing costs linked to new requirements to provide time-in-lieu to teachers. One interviewee saw a missed opportunity to engage with youth in the outdoors because Scouts and Guides are not as prevalent as they once were. Another explained that pre-school and primary school aged children in the African community have much more influence on their parents than high school aged children and hence suggested engaging younger children with the outdoors. Another interviewee saw the importance of setting up programs that ensure school groups have positive experiences of the outdoors on school camps. This was linked to adopting a focus on personal development and wellbeing.

A number of industry initiatives were seen to enhance diversity and inclusion in the outdoor industry, including the government funded 'Positive Start' program to support students from lower socio-economic backgrounds to access school camps, the Australian Camps

Association's 'People Outdoors' program for people with disability, as well as not-for-profit organisations including First Hike Project, supporting youth from refugee backgrounds with outdoors experiences, and Escaping Your Comfort Zone, which provides slower outdoors experiences for body diverse women and non-binary people.

While outdoor education in Australia has strong ties to environmental ethos, various research participants feel that the outdoor industry is underpinned by a Western approach (i.e., the focus has traditionally been placed on conquering nature, the utilitarian use of outdoor spaces and a sense of competition to be the strongest/fastest). Several interviewees suggested that **a more eco-centric approach and wellbeing framework would align better with the educational components of the outdoor industry, as well as First Nations' approaches** (i.e., the focus is on respecting and connecting with nature and acknowledging its therapeutic benefits). Such approaches to the outdoors can also be seen as barriers/opportunities to engage with certain CALD communities. A number of interviewees supported recentering the outdoor industry around wellbeing and public health in order to highlight its value to participants as well as society. This would in turn lead to increased awareness and attract support from government and the private sector. Some of these ideas are reflected below:

"I think the current outdoor education model is outdated. In terms of program design, I think that there's real opportunity for outdoor education as a whole, just offering different types of programs that really helped to develop and work on well-being ... that integrates outdoor education and First Nations culture as a whole school approach. I think there's real opportunity for that, where we can collaborate with different disciplines and create some really epic programs. If wellbeing is one of the key frameworks that outdoor education is trying to provide as in terms of outcomes, then I think there's a capacity for us to change the model that we use." P6, Employee

4.4 Professionalisation, training & development

The interview data revealed the importance of greater professionalisation and accreditation to improve the industry's working conditions, image and public perception. Industry leaders are focussed on increasing professionalisation through the qualification and requalification of staff, as well as organisations' compliance with standards and business accreditation.

KEY THEMES FOR PROFESSIONALISATION, TRAINING & DEVELOPMENT

The outdoor industry needs greater professionalisation and accreditation to improve working conditions, image and public perception. Voluntary compliance of risk management and safety standards currently lead to a wide variation in safety practices across the industry. Calls are made for mandatory compliance systems to improve quality and industry image.

Education and training pathways are currently disjointed and dualistic. TAFE trained employees are perceived to lack skills related to critical thinking and strategic management while university trained employees' acquisition of technical or hard skills is not well understood. There is a need to strengthen collaboration between industry and the education system as well as between the vocational and higher education sectors to enable synergistic learning experiences using known training and educational structures, such as the AQF. There is also a need for traineeships, short courses, and affordable training to encourage entrance by people from diverse and lower socio-economic backgrounds.

Risk management, safety & standards

The Australian Adventure Activity Standard (AAAS) and related Good Practice Guides developed by state outdoor bodies have provided a voluntary good-practice framework and improved the industry's understanding of risk management and how safety standards are measured in the outdoor industry, enabling more providers to secure insurance.

Several interviewees explained that certain activities in the outdoor industry have the potential for risk and hence require regulation to ensure safety, including a minimum standard of qualification. In practice, though, there is inconsistency with some providers promoting high standards with no flexibility and others hiring unqualified staff. This was the experience of several employees, represented by the following quote:

"When I look at other roles that are available, other casual roles, there are operators that are also letting leaders or facilitators teach with zero qualifications or logbook experience in that area. People leading kayak journeys when they've never been in a kayak before sort of thing. It's this real mismatch of some employers expecting really high standards and high logbook hours and wanting you to do all their own training before they'll let you do something, versus some employers that are happy to take the risk and send you out with kids without actually any qualification. The bigger the business, the more regulated they are in terms of their risk profile they're willing to take on." P14, Employee

Several interviewees suggested that mandating the AAAS as a way to increase industry safety and professionalisation. At the same time, one interviewee explained that parts of the AAAS are still quite vague and only refer to the vocational education sector and that more alignment, mapping and compliance work is needed when it comes higher education and degrees. Other industry leaders see increased regulation as a barrier to operations, especially for small businesses who cannot afford the associated costs. As the following series of quotes demonstrate, there is contention in the industry regarding the optimal approach to enhancing professionalisation and standards:

"We can't become too regimented as it will destroy smaller providers, because there is no way small providers can ever keep up with a highly regulated currency of skills." P2, Employer

“It's when and how bad things go wrong in the outdoors, these activities are inherently dangerous, but that's also what gives them the thrill and the enjoyment, which is why we accept risk to do them. So, we need to fulfill our duty of care, that we're removing all of the controllable risks. It is just the random factors that come in and for me it doesn't matter if it's a small or large business. Everyone needs to do it. It may look different. The documentation might be more complex, or there might be more training systems because you've got multi levels of staff ... but the key safety things still need to be addressed. The ones that go 'regulations are too much' are the ones that want to keep doing things the way they're doing. It's about controlling their world, not what's best for the industry, because the thing is good compliance costs money.” P10, Industry expert

There is a perceived lack of accountability in term of self-regulation with research participants observing little risk management in many businesses, both large and small (e.g., risk assessment documents, operating procedures, maintenance and inspection records, incident and emergency response plans, induction and training). One industry expert explained that allocating resources to risk management, compliance and attracting and retaining qualified staff would pay off in the long run because it would lead to more business and outside investment, in turn, elevating the industry's professional image and working conditions:

“My view is someone is always paying the price somewhere. You save money in risk management. You're going to cost money in insurance. You're going to cost money in lack of return customers, because if they don't have a good, safe experience, they stop spending money in the industry. Their friends will stop spending money in the industry. Sponsors and industry and venture capital don't invest in the industry. I think that's going to be a big shift in the future. We're going to see outside money coming in and trying to invest in because it is a very immature industry compared to the rest. If we can show we are an accredited business and all of our staff have university qualifications, we can start charging more. We can professionalise the industry. In Europe, mountain guides are up there with lawyers and doctors. They are the cream of society.” P10, Industry expert

Education & training pathways

The current education and training pathways appear to be confusing for some participants. Although individuals can enter the industry via two main pathways – namely the TAFE pathway or the Higher Education pathway, including certificates II, III or IV or diploma in Outdoor Recreation/ Leadership or Bachelor of Outdoor Education/ Leadership – these pathways have several limitations.

First, the education system itself can be difficult to access. While some Outdoor Recreation/Leadership certificates are Fee Free TAFE courses in several states, they are only accessible to permanent residents and Australian citizens, thereby creating employment

barriers for prospective international students and refugees. The additional costs of these courses, such as gear and associated background checks (e.g., Working with Children Check) mean that individuals from low socio-economic backgrounds are disadvantaged. These Fee Free TAFE courses are also not guaranteed to be funded by State Governments in future years.

Second, various interviewees highlighted that TAFE courses did not instil critical soft skills (e.g., dynamic group management, communication, critical thinking, interpersonal, self-awareness) into their curriculum. Another workforce skills shortage was found in outdoor professionals' knowledge of education methodology and teaching pedagogy, which are not embedded in the training package. Students attributed this in part to the fast pace of TAFE courses with a large body of content delivered over a relatively short period of time. Some of these views are represented below:

"Skill-wise, staff go through the TAFE pathway. They study for 12 months, and then they are qualified to go out in the field, essentially, they can go on to a diploma, but a lot of people do that set for these 12 months, and then they start working, which gives them all the hard skills, and we don't find many challenges with your hard skills in the outdoors. But we are finding a lot of staff, don't necessarily come with the soft skills that are needed to be an efficient staff member on school camps. So communication skills, self-management skills." P8, Employer

"There's a lack of a focus on the experiential education methodology and teaching to it and just people understanding the different theories, which is what the methodology is that outdoor ed uses, we just use it in the outdoors. Because there's a lack of that being included in the [training] packages." P9, Employer

"You see that people who studied at [university] definitely are far more equipped than people who just come out as a one-year TAFE grad or whatever. They just get more experience. They get more exposure. They get better training. It's more nuanced because they do it over a period of three years and they get to specialise. Whereas we're doing what isn't even a full year. It ends up being what maybe eight to 10 months. It's a bit of a crash course. In that time, you do placements, you do trips, but I don't know, maybe it's the fact that the courses try and offer a lot ... probably scratching the surface. In the time that you have in a TAFE course, it's just not enough to become competent." P29, Employee

Third, a lack of clarity exists regarding university course assessment outcome processes. These processes do not provide graduates with clear proof of National Training Package (NTP) competency-based skills, which some employers quote as an insurance requirements, although other employers do not have this same requirement, highlighting a lack of consistency. A Certificate IV is currently seen as the preferred minimum standard to enter the industry; however, some employers would like the minimum standard to be raised to degree qualified to acknowledge the critical thinking skills required in the profession. University qualified graduates, however, have found that some employers require them to undertake further training to receive NTP competencies found in the vocational education

sector, even though they may have covered the learning outcomes of these competencies within their university education:

“They [employers] care [about qualifications] in terms of younger people like me entering the industry. They're much more aware that they want people with degrees ... and making me jump through those hoops in terms of not recognising the actual hard skills. It's a real problem between, particularly for the university sector, because the TAFE, hard skills are very competency-based and are ticked off really clearly for employees - that they can do this. Whereas the university system, although it's tried to map against those TAFE, hard skills, where you're crossing over, obviously, there's further learnings that you're putting on top, but it's not actually competency-based. If someone has done a TAFE unit, they know what this means. For the university sector, it's really difficult to try and prove those hard skills ... For a long, long time, the university sector has had real difficulty with the reverse recognition of prior learning, if that's a thing. So, justifying your university learning to the TAFE.”
P14, Employee

A number of industry experts and employers felt that **strengthening collaboration between industry and the education system, as well as further collaboration across the vocational and higher education sectors, would result in a more synergistic acquisition of knowledge and skills and smoother educational pathways with defined professional outcomes.**

Paid traineeships were attractive to aspiring employees, as were courses eligible for Fee Free TAFE and undertaking a series of shorter modules (e.g., Activity Group Skill Micro-credentials, or AGSMs), especially for mature aged students, who did not want to be away from work or family for extended periods of time on camps. Despite a keen interest, full-time study for a year or more was also seen as challenging due to financial responsibilities, as articulated by the following interviewee:

“Earlier this year I was sort of in between work and I thought maybe I want to pursue something I'm really passionate about. So I looked into courses. There were multiple options and then I looked into TAFE and they had their Outdoor Ed Certificate IV in outdoor leadership or guiding. I thought that sounded really great. I went to the open day. I had a chat to the guy there. He was really helpful through the whole thing. And it was hard for me because I just needed to pay my way. I've got a lifestyle I'm going to lead, and I can't go from a full-time wage, to studying three days a week. It just wasn't really feasible for me.” P16, Aspiring employee

For these reasons, **short courses were largely more attractive than longer courses requiring time away from paid work and personal responsibilities.** Many of the aspiring employees interviewed had considerable experience in the outdoors in a personal or volunteer capacity. All but one thought that a series of short courses (e.g., AGSMs) would be

sufficient for them to gain the skills required to feel competent to enter the industry. While it was acknowledged that their hard skills required certification, they also believed they had already acquired the necessary soft skills through their previous work experience and careers in other sectors. Some expressed concern, however, that employers might have a problem with the short courses. Some of these ideas are outlined below.

“I think I need the qualification to be able to work in the industry, you need at least a Cert III to be able to work in the industry. That’s what I’ve heard. But if it was just short courses, and you could work in the industry from that then I think that would be pretty good.” P19, Aspiring employee

“I think that’s a better model than [having to] take a year off. Just because I probably have to study and work at nights and then just save up money for the periods of excursions, because it seems like for the courses I’ve looked at, you need to go camping for a week or two. So yeah, the module-based thing sounds much more achievable. You can do it with your annual leave ... that sounds quite manageable compared to a year-long commitment.” P20, Aspiring employee

Another prospective employee, however, thought that short courses would not provide the necessary soft skills required to work in the industry. This view was also voiced by several industry experts and employers. Rather, short courses were mostly seen as a way to specialise in specific activities and upskill current employees.

“I don’t think it [a short course] is going to give you the full qualifications that you need. I think it will allow you to pick up additional training, to be able to pick up the additional disciplines. I think what they’re offering is going to lack with regards to facilitation ... I don’t think those short little courses are going to provide the necessary soft skills, the facilitation part at the different [age] levels.” P18, Aspiring Employee

“Would employers hire staff doing short courses? For some elements you could, but for other elements ... as an entry into the sector, you couldn’t, so perhaps that question needs to be fanned out a little bit more. Because it’s really dependent on their role as to whether or not you could offer employment based off completion of one or two short course units, or three or four, even.” P2, Employer

One aspiring employee thought that only having short course qualifications would have negative implications for remuneration:

“I think, well you do need the Cert IV now ... it certainly dictates your wage, like what they pay you. If you just have a short course, they pay you the lowest rate and then

they said if you get your Cert III and they pay you another rate and then you get your Cert IV and they pay you the top rate.” P24, Aspiring employee

Several industry experts and employers thought that the increasing professionalisation of the industry means that the development and provision of **short courses will be needed for the requalification of existing staff, and that short courses will also assist people transitioning from other sectors to enter the outdoor industry faster**. Some of the more mature aspiring employees felt that short courses would be appropriate for them to enter the industry because they had already acquired the necessary soft skills through their careers in other sectors.

Some employers observed that graduates are not always workplace ready and require more upskilling when they enter the industry. Once graduates have entered the workforce, however, many find that ongoing training and professional development opportunities are not presented. These sentiments are reflected in the interview excerpt below:

“The training does not prepare you to do any more work beyond the field work ... once you want to move to into leadership to management to somewhere senior, there is no training provided to do those roles [which] are very different than being in the field. I would say, entering the profession, the training is very good, but progressing through your career to do other work, not very much. There's no time because you are worked to the bone. All the companies out there, say I want to give you more training, we just don't have the time. Then you as a person, you're burnt out and then you don't want to do more.” P15, Employee

4.5 Interview findings summary

Overall, the key findings from the interviews support and build upon much of the literature, indicating that the skilled labour supply issues in the outdoor industry stem from a variety of factors, namely:

- The boundaries of the industry are not clearly defined, in part due to a lack of workforce data and full and accurate representation in official statistics, meaning that its value is not captured (i.e., social, economic and environmental benefits). This contributes to a problematic public image, poor awareness and understanding of the industry and its job and career opportunities, and a limited capacity for industry advocacy.
- Parts of the industry appear fractured and negative narratives and self-talk undermine the industry's self-image and potentially turn away aspiring employees. More collaborative and coordinated efforts, potentially in the form of an industry 'reset' and/or rebrand, as well as the formation of an employee association were suggested as possible solutions.

- Children from lower socio-economic families and CALD communities appear to lack exposure to the outdoors and school-based outdoor education camps. Contributing factors include parental attitudes and socio-cultural perceptions of outdoor environments as dangerous and the perceived low status of outdoor work, as well as access issues and financial barriers in terms of the cost of programs.
- Interview findings reinforce that various working conditions in the outdoor industry do not support employee attraction and retention, including physically and emotionally demanding work resulting in burnout, high casualisation and job insecurity, limited career advancement opportunities and low/ volatile pay, differences in pay rates across employers, unclear or no information about pay, and lack of recognition of work value. Pay issues are currently exacerbated in a highly competitive environment with employers competing to recruit skilled staff.
- There is a lack of clear award conditions and diverse awards are applied that may only partially align with the actual conditions of work and the work performed. Contention exists within the industry regarding the role and value of greater unionisation and industry-wide bargaining agreements.
- The outdoor workforce is predominantly white and male. While it is acknowledged that more outdoor industry employers and organisations are moving towards supporting greater diversity and inclusion in the industry, stereotypes and some working conditions and work cultures expose a range of challenges and barriers for employees and potential candidates, especially people with diverse backgrounds, which help explain why they might not consider the industry as a career choice and/or decide to leave the industry.
- Further strategies need to be actioned to strengthen the industry's diversity and inclusion; strategies proposed ranged from the individual and organisational levels to industry and system-wide approaches. Together, these actions and more collaborative efforts between industry stakeholders could help combat the challenges and barriers for minority groups working in the outdoor industry or seeking to advance their career in the profession.
- Employers require or prefer employees to have certain qualifications due to safety and standards factors, in addition to compliance reasons to meet requirements for government, insurance policies and land managers, although there is a lack of consistency around how employers implement these requirements. At the same time, the pay levels for those with higher education is not significantly different to employees with vocational qualifications, which does not provide financial reward nor motivation for employees to complete further qualification.
- There is a disconnect between outdoor industry graduates' readiness and the skills and knowledge required in the field (i.e., some TAFE graduates appear to lack critical thinking and facilitation skills and knowledge of educational theories, whereas university graduates' assessment outcome processes do not follow the NTP competency-based procedure to prove certain skillsets creating complexity for university graduates who may have the skillsets, but not the NTP competency to acknowledge their capacity).

- To support synergistic learning experiences, there is a need to strengthen collaboration between industry and the education system, as well as between the vocational and higher education sectors through the use of structures to support educational pathways such as the AQF. There is also a need for traineeships, short courses, and affordable training to encourage entrance by people from diverse and lower socio-economic backgrounds.
- Approaches to increasing professionalisation in the outdoor industry are contentious with some stakeholders supporting self-regulation, while others seek to mandate standards; regardless of the approach, more alignment, mapping and compliance work is needed when it comes to education and training pathways and minimum qualifications, which need to be more clearly defined.

5.0 Conclusion

The outdoor industry is in a state of recovery, rapid growth, and transformation with a future-focus in terms of supporting sustainable workforce development, improving structures, and increasing professionalisation. While the social, economic and environmental value of the industry is emerging, the benefits for the industry and its workforce are not being realised. These issues led to the formation of the Outdoor Education Innovation Hub, supported by the Victorian Government, designed to provide industry-informed, future-orientated, and student-centred outdoor industry education, training and research. The research pertaining to the larger OEIH project, captured in this report, was guided by the two-fold objective to determine the needs, preferences and priorities of prospective and aspiring employees, and investigate the ongoing professional development requirements of future talent to meet the medium and longer-term needs of the evolving outdoor business environment. The key findings from this research, as well as the contribution to knowledge and research gaps, are summarised in the following sub-sections.

Using mixed-methods and a participatory approach that actively involved industry stakeholders, this research provides a holistic investigation of the outdoor education industry, as well as a deeper insight into the diverse experiences and perceptions of industry stakeholders, including outdoor industry companies, volunteer organisations, industry associations, education institutions, the workforce and prospective employees.

The findings highlight that employers are concerned about how they will attract and retain staff and that there are a combination of issues presenting major obstacles to building a sustainable workforce. A key issue is that many of the working conditions in the outdoor industry do not support employee attraction and retention. For example, physically and emotionally demanding work results in work-related stress and burnout; precarious work and high casualisation creates job insecurity and volatile pay; a lack of clear award conditions and diverse awards, combined with labour and skill shortages, has led to significant differences in pay rates and work conditions across employers; and little job flexibility, where front-line fieldwork staff rarely have office-based duties, exacerbates limited career advancement opportunities. The finding that some businesses appear uncollaborative, further fuels these problems because a coordinated effort is required to address workforce development as a systemic issue.

Diversity, inclusion and accessibility emerged as critical issues in the outdoor industry workforce, which is predominantly white, and male dominated, particularly in management. While more outdoor industry employers and organisations appear to want to move towards supporting greater diversity and inclusion in the industry, the tough working conditions and discriminatory work cultures, (unconscious) gender bias and sexist attitudes expose a range of challenges and barriers for employees and potential candidates, especially people with diverse backgrounds. These findings help to explain why people might not consider the industry as a career choice and/or decide to leave the industry. Increasing diversity requires structural change led by organisations, educational institutions and peak industry bodies.

Increasing professionalisation is seen as a key means of moving the industry forward. Approaches to achieving and demonstrating professionalisation in the outdoor industry, however, are contentious. Some stakeholders support self-regulation, while others seek to mandate standards; regardless of the approach, more alignment, mapping and compliance work is needed to address education and training pathways and minimum qualifications, which need to be more clearly defined. Employers require or prefer employees to have certain qualifications due to safety and standards factors, in addition to compliance reasons to meet requirements for government, insurance policies and land managers, although there is a lack of consistency in how requirements are implemented. There is also a disconnect between outdoor industry graduates' readiness and the skills and knowledge required in the field (i.e., TAFE graduates lack critical thinking and facilitation skills and knowledge of educational theories, whereas university graduates lack industry accepted evidence of their competency to perform skillsets).

A key finding that has the potential to undermine industry efforts, is that the outdoor industry does not have a distinct identity with clear boundaries. The defining characteristics of the outdoor industry are contested due to the widely diverse forms of activity, settings and roles (e.g., educators, teachers, guides, tourism operators etc.) and purposes (e.g., profit, education, recreation, welfare, health etc.), reinforced by a lack of workforce data and full and accurate representation in official statistics. Together, this has helped lead to a problematic public image (i.e., low status), poor awareness and understanding of the industry and its job and career opportunities, which are central for recruiting and retaining skilled professionals and relieving labour supply issues, as well as a limited capacity for industry advocacy. The value of the outdoor industry is not captured and therefore cannot be articulated, despite the seemingly obvious social, economic and environmental benefits of nature and the outdoors.

Another important finding, which may feed into the misconceptions about the outdoor industry and the lack of skilled labour, is that children from lower socio-economic families and CALD communities appear to lack exposure to the outdoors. In part, this is linked to access barriers to school-based outdoor education camps. These exposure and access issues appear to be fuelled by parental attitudes, the perceived low status of outdoor jobs, financial barriers/ the cost of programs, as well as a fear of outdoor environments that may be instilled in some communities.

Contribution to knowledge and research gaps

This research has helped to address apparent gaps in the academic and grey literature relating to the outdoor industry and outdoor education. Specifically, the research contributes to existing knowledge by:

- Examining diversity and inclusion issues in the outdoor industry from the perspectives of under-represented populations, including women, people with CALD backgrounds, and people who identify as gender and sexuality diverse, body diverse and/or neurodiverse.

- Examining diversity and inclusion issues in the outdoor industry from the perspectives of under-represented populations, including women, people with CALD backgrounds, and people who identify as gender and sexuality diverse, body diverse and/or neurodiverse.
- Adding First Nations voices in terms of their perceptions and experience of the outdoor industry as practitioners - the perceptions and experience of Indigenous outdoor students remain an important focus for future research.
- Providing insights into the qualifications of the current outdoor industry workforce, encompassing those working within and outside the school system - more research is required to gain a more representative sample from the states and territories and nationally.
- Providing datasets that can be used by industry to advocate for change, support and assistance from state and federal government.

An opportunity remains for further research to help capture the full social, economic and environmental value of the industry, potentially in the form of an economic analysis, to determine the direct and indirect impact and value of the outdoor industry. Another part of this should include exploration of how to measure and capture the health and wellbeing benefits of the outdoor industry, considering the strong links to public, physical and mental health. Findings from such research could be used to support discussions around industry identity and potentially inform and underpin the development and implementation of a possible industry 'reset' or 'rebrand'. Another piece of research that would support such efforts would be an evaluation and assessment of similar industries professional structures for frameworks that would support the outdoor industry, for example, professional associations, unions, accreditation requirements.

While acknowledging the challenges with sampling and gaining access to under-represented and hard-to-reach minority groups, future research should further amplify the voices of people with diverse backgrounds in the outdoor industry, particularly the perspectives of people living with physical disability. The latter were not included in this study, due to the barriers mentioned above. Furthermore, some external stakeholder views, such as those of parents, family members, teachers and career advisors, would be worth investigating to confirm the findings in this research regarding their perception of the outdoor industry as a promising career option and how they might influence young people/students, as well as their peers.

Finally, being nature-based, the threats presented by climate change, extreme weather and natural disasters are especially acute for the outdoor industry. There is a need for industry development strategies focussed on building industry, organisational and workforce resilience, and more research is needed to examine how the outdoor industry can apply such principles and practices.

6.0 Implementation plan & recommendations

The outdoor industry is in a state of transformation and its economic and socio-cultural value is becoming clear. Informed by multiple sources of primary and secondary data, the implementation plan outlined below provides recommendations on immediate priorities and longer-term strategies to address the evolving workforce challenges and needs for the outdoor industry's sustainable future. Recommendations relate to the industry's workforce development and skilled talent and are positioned across four critical action areas, namely:

- Industry image and identity
- Staff attraction and retention
- Diversity, inclusion and accessibility
- Professionalisation, training and development

The intention of the implementation plan is to enable outdoor industry employers and stakeholders to capitalise on new opportunities for sustainable growth. It is recognised that many of the issues identified, such as labour shortages, are an outcome of systemic issues that will require long-term structural reform and extensive collaboration between industry and government to resolve. As such, strategies are proposed as short-term and long-term measures necessary to address the relative vulnerabilities identified by the research.

6.1 Action area: Industry image & identity

Despite having important connections to health, wellbeing and personal development outcomes, the outdoor industry appears to have an image problem with little public recognition of the industry's socio-economic value. Implications for sustainable workforce development include a low status and poor awareness and understanding of the industry and its job and career opportunities, which are central for recruiting and retaining skilled professionals. The outdoor industry's formalised governance and structure are still emerging and there is need for further strategy building through which to plan and drive the industry's development. These issues are underpinned by a lack of a clear industry identity, whereby the boundaries of the outdoor industry are contested by different internal stakeholders. Further, workforce data are not fully captured by official statistics (e.g., ABS/ ANZSIC/ ANZCO). Extensive industry collaboration, consensus of industry identity and a clear plan are needed to guide industry development, advocacy, investment and funding that will help leverage the outdoor industry's socio-cultural and economic benefits and potential. Within this context, the following recommendations are proposed.

Industry Image & identity		
Immediate priorities	Details	Required stakeholders
<p>Increase exposure and engagement</p> <p><i>*Also links to Action Area 6.4</i></p>	<p>Increase awareness and support a better understanding of the jobs, careers and pathways available in the industry by engage with diverse communities.</p> <p>Support access and exposure to the outdoors for young people, especially children from CALD communities and low socio-economic families and schools, through school-based camps and programs (e.g., early childhood programs including bush kindergarten, formal inclusion of outdoor education in F-10 curriculum in addition to VCE curriculum).</p> <p>Continue to build a presence and visibility at the major job and career fairs and expos (e.g., VCE and Careers Expo, Melbourne Career Expo, Victorian Careers Show, university and TAFE career days).</p> <p>Engage and network with education systems (e.g., schools, TAFEs, universities, LLENs) and present to students, educators and career practitioners (e.g., peak bodies and operators to attend careers days and events hosted by education providers and LGAs, speak to classes, attend and present at meetings and conferences, such as the Australian Centre for Career Education conference etc.).</p> <p>Gain media exposure through social media, newspapers, TV and radio.</p>	<p>Operators, employers, peak bodies, education system</p>
Active recruitment beyond industry	<p>Active recruitment beyond internal industry networks and social media groups. Post job advertisements on mainstream online employment marketplace platforms, such as Seek.</p> <p>Develop and maintain an online 'job advertising board' for the industry. This could serve the dual purpose of: (1) providing a platform for employers to advertise more broadly, and (2) act as a key point of information for the workforce and prospective employees to learn about the type of roles available in the industry, as well as form expectations around working conditions, allowing them to make more informed decisions about entering or staying in the industry. This platform may be best managed at a national level using a central hub to attract and support international workers and people who want interstate work experience, and to foster interstate industry collaboration.</p>	<p>Operators, employers, peak bodies</p>

Investigate comparable models of industry development	As a basis for improving industry image, explore and document models of industry development in comparable industries (e.g., education, the care professions or tourism), both locally and internationally, to inform future strategies.	Government, peak bodies, universities.
Build a consensus of industry identity	Bring stakeholders together to build a consensus of the industry identity, for example, through a series of industry stakeholder consultation workshops. Without an encompassing identity the industry will remain fragmented and continue to struggle to access government and societal support and lift the public image.	Government, peak bodies, universities/TAFE, employers and businesses

Industry Image & identity		
Longer-term strategies	Details	Required stakeholders
Further research for the evolving outdoor business environment	<p>More research to build a strong industry identity for industry advocacy and data-driven/ evidence-based decisions.</p> <p>Research gaps and opportunities include:</p> <ul style="list-style-type: none"> ▪ Apply economic models - direct and indirect - to determine socio-economic impact and value of the outdoor industry. ▪ Identifying and investigating the views of parents, family members, teachers and career advisors on how they perceive the outdoor industry as a career option and how they influence young people/ students/ networks/ peers. ▪ Further exploration of how to measure the health and wellbeing impact and value of the outdoor industry. ▪ Examine how the outdoor industry can apply resilience and regeneration principles and practices. <p>Examine how to approach the broader OEIH project objective of 'A Resilient Foundation for the Future' measurement and success in the long term.</p>	Peak bodies, universities, government
Data warehouse/dashboard	Explore possibilities of developing a digital data warehouse to support outdoor industry associations and businesses with insights, for example into online exposure, bookings and marketing.	Peak bodies, universities

	See: Australian Tourism Data Warehouse (ATDW) national platform jointly owned and managed by all Australian state and territory government tourism bodies; Tourism Research Australia data warehouse; Caravan Industry Association of Australia data dashboard - caravanstats.com	
Industry-wide repositioning/rebrand	Industry-wide repositioning/rebrand to practice, communicate and increase awareness of the values, professionalism, pathways and inclusivity of the industry. Repositioning or rebranding the industry can enhance the industry's image to attract new entrants. Change the language being used to dispel societal misconceptions and combat the negative internal dialogue in the industry. Build professional identities beyond 'activity provider' (e.g., with a focus on conquering nature) and develop roles that focus on more eco-centric approaches to education (e.g., respecting and connecting with nature and acknowledging therapeutic benefits).	Employers, operators, peak bodies, employees
Attract support and funding	Use data to attract support and funding to support priority area activities through communicating the values of the industry (e.g., learning outcomes, personal growth, mental and public health benefits, social change) to government bodies and private investors.	Peak bodies

6.2 Action area: Staff attraction & retention

The outdoor industry requires employees with specific hard and soft skillsets to deliver quality and safe experiences. The acute skills and labour shortages reported by employers hence presents significant challenges, which are reinforced by a highly competitive external labour market, where other sectors are recruiting from the same talent pool and offer more lucrative rewards and job security. Addressing this problem requires a combination of strategies, collaboration from businesses, industry and government, and transformational change to improve employment conditions. The following actions are proposed in this wider context.

Staff attraction & retention		
Immediate priorities	Details	Required stakeholders
Strategic and data-driven recruitment processes	Diversify recruitment channels to access diverse and multigenerational employees and volunteers (e.g., engagement with CALD community leaders, First Nations Elders, disadvantaged schools, and disability associations).	Peak bodies, employers, operators

**Also links to Action Area 6.1*

Total reward management strategy	Implement and communicate a total reward management strategy (that embraces both financial and non-financial factors, including organisational culture, provision of gear and personal protective equipment, training, recognition and meaningful work) to motivate current and aspiring employees.	Peak bodies, employers, operators
Job design	Undertake work analysis and design processes to craft jobs that are mutually beneficial for employers (in terms of enhancing performance) and employees (in terms of job autonomy and work-life balance considerations).	Employers, operators, peak bodies
Professional development for employees and employers	Provide accessible, value-for-money and engaging workforce development programs to both permanent and casual staff.	Peak bodies, employers, operators
<i>*Also links to Action Area 6.4</i>	Enhance the strategic HRM skills of business owners and managers through formal training, mentoring and coaching, and engagement with the Australian Human Resource Institute (AHRI).	

Staff attraction & retention		
Longer-term strategies	Details	Required stakeholders
Review industry awards and working conditions	<p>Include the following considerations in a review of the working conditions and awards used in the industry:</p> <ul style="list-style-type: none"> Identify and assess comparative industries (e.g., Mining and construction industries with Fly-in Fly-out arrangements, long-haul tourism, nursing/ care/ emergency industries with shift work outside 9-5pm) Define the differing business requirements in the industry Explore industry-wide bargaining agreement options, benefits and challenges, noting that diversity and inclusion policies, as well as a code of conduct for the industry could be embedded within this (see action area on diversity, inclusion and accessibility) 	Employers, operators, peak bodies, union, government
Business flexibility – job security balance	<p>Achieve a balance between staffing flexibility and job continuity through various measures:</p> <ul style="list-style-type: none"> Job rotation and cross skilling across departments in large organisations 	Peak bodies, employers, operators

	<ul style="list-style-type: none"> Permanent part-time and job sharing across SMEs. This requires broader stakeholder collaboration and sustained industry commitment to connect casual workers to other work opportunities during off-peak seasons 	
Recruitment metrics	Explore the use of recruitment metrics (e.g., time to hire, applicants per opening, candidate job satisfaction, etc.) to track hiring success and optimise the hiring process in outdoor organisations.	Employers, operators
Further research	Examine how to approach the broader OEIH project objective of 'Careers in the Outdoor not just Jobs' measurement and success in the long term.	Peak bodies, universities, government

6.3 Action area: Diversity, inclusion & accessibility

Outdoor industry employers and organisations are moving towards supporting greater diversity and inclusion in the industry. Discriminatory work cultures, (unconscious) gender bias and sexist attitudes, however, appear to exist in parts of the industry. This presents significant barriers and challenges for staff and prospective employees, especially people with diverse backgrounds, and helps to explain why some people might not consider the industry as a career choice and/or decide to leave the industry. Additional strategies are necessary to strengthen the industry's diversity and inclusion, ranging from the individual and organisational levels to industry and system-wide approaches. Together, these actions and more collaborative efforts between industry stakeholders could help combat the challenges and barriers for minority groups working in the outdoor industry or seeking to advance their career in the profession. The following recommendations are suggested to encourage employer adoption and implementation of diversity and inclusion (D&I) principles and practises in all aspects of operations, from recruitment and retention strategies to messages and policies.

Diversity, inclusion & accessibility		
Immediate priorities	Details	Required stakeholders
D&I strategy	Build a shared and comprehensive understanding of diversity in terms of gender, race, ethnic background, (dis)ability, body size, age, etc.	Employers, operators, employees, peak bodies
Diversify leadership	Nominate leaders with diverse backgrounds to industry boards, potentially through the use of quotas.	Employers, operators, peak bodies
Diversify messages	Include more diverse representation in marketing, social media, images, communications etc.	Employers, operators, peak bodies

Scholarships	Support scholarships (e.g., to fund enrolment fees, gear, travel allowance) for people from minority groups and lower socio-economic backgrounds to attend outdoor specific short courses, vocational and higher education courses.	Education system, private sector, government
D&I training <i>*Also links to Action Area 6.2</i>	Educate management and staff by providing diversity and inclusion training, including but not limited to: anti-racism training, conflict management training, cultural awareness and sensitivity training, disability training, diversity and inclusion training, workplace bullying, harassment and discrimination training. Ensure training is delivered by an appropriate trainer with expertise.	Employers, operators, peak bodies
D&I company policies <i>*Also links to Action Area 6.2</i>	Develop and implement diversity and inclusion company policies, including but not limited to: recruitment and selection policy, flexible working policy, work-life policy, workplace bullying, harassment and discrimination policy, disability and reasonable adjustments policy, mental health and wellbeing policy. Consult appropriate expertise where necessary.	Employers, operators, organisations
Code of conduct <i>*Also links to Action Area 6.2</i>	Protect staff by developing and implementing a code of conduct whereby clients are colleagues are contractually obliged to behave appropriately and treat outdoor staff with respect and dignity.	Employers, operators, organisations

Diversity, inclusion & accessibility		
Longer-term strategies	Details	Required stakeholders
Enhance the physical accessibility	<p>Apply for grants to increase the accessible use of facilities, equipment, vehicles, course areas and instructional methods.</p> <p>Liaise with Parks Victoria to identify and develop more accessible parks.</p> <p>Apply for grants and invest in accessible facilities and infrastructure.</p> <p>Explore the concepts and practice of Universal Design for Learning (UDL) to facilitate access and participation by all people regardless of their age, size, ability or disability.</p>	Employers, operators, peak bodies

D&I toolkit/resources	<p>Develop and promote additional toolkits/resources to support businesses to be more inclusive of different groups, both in terms of participation and workforce employment, including but not limited to: physical disability, neurodiversity, invisible disability, body diversity, First Nations, LGBTIQA+, CALD community. NB: A physical disability toolkit has been developed by Outdoors Victoria, in collaboration with industry organisations, to provide a resource for outdoor providers to be more inclusive of participants living with a physical disability. Another toolkit is currently being developed for participants with intellectual disabilities and a wide range of disabilities and neurocognitive diversity. Extending these toolkits to the workforce would further support D&I in the industry and support and funding opportunities can be sought.</p> <p>Consult with industry experts and leading organisations and develop best practice case studies.</p>	Peak bodies, employers, operators
Programs to engage more diverse groups	Develop and deliver programs designed to engage more diverse groups in the outdoors (e.g., People Outdoors program for people with a disability; First Hike Project for people from refugee backgrounds).	Peak bodies
Further research	<p>Further exploration of how to promote diversity, inclusion and accessibility in the outdoor industry most effectively.</p> <p>Examine how to approach the broader OEIH project objective of 'Everyone's Outdoors' measurement and success in the long term.</p>	Peak bodies, universities, government

6.4 Action area: Professionalisation, training & development

The significant growth of the outdoor industry has provided an impetus for more structure and professionalisation. There is contention amongst industry stakeholders, however, on the best means to achieve and demonstrate professionalisation, and approaches proposed range from self-regulation to mandating standards. More clarity around education and training pathways and minimum qualifications is also required, including clear definitions and further alignment, mapping and compliance work. At the same time, graduates' readiness does not always meet the skills and knowledge required in the field. This partly based on a quality and risk management standpoint; another part concerns compliance factors to meet the requirements of regulatory bodies and insurers. It is within this background that the following recommendations are suggested.

Professionalisation, training & development		
Immediate priorities	Details	Required stakeholders
Industry collaboration and cooperation	Bring together associations, organisations and peak bodies to partner and work collaboratively on joint projects and campaigns (e.g., industry repositioning/rebrand).	Employers, operators, peak bodies
Vocational and Higher Education collaboration	<p>Enhance education pathways and continuity through building a bridge and increased collaboration between vocational and higher education sectors so that students can continue their education and qualification seamlessly from short courses and certificates through to post-graduate degrees (e.g., AQF levels 1 to 10).</p> <p>Continue and increase engagements and collaboration between industry and education providers to support industry-informed curriculum and training package design in line with provided government structures (e.g. AQF).</p> <p>Courses need to increase industry exposure for students to be workplace ready, for example through internships/ work integrated learning/ traineeships.</p>	Employers, operators, peak bodies, education system
National peak body	Strengthen national peak body to support congruence across the states and territories and develop national strategy and advocate for industry to government.	National, state and territory peak bodies
Collaborate across industry associations in other sectors	There are clear links between the outdoor industry and other sectors and especially tourism. Collaboration across industry associations, such as Victorian Tourism Industry Council (VTIC), Australian Tourism Industry Council (ATIC), Australian Association of Bush Adventure Therapy (AABAT), Outdoor Healthcare Australia (OHA) and Outdoors Victoria (OV) could have mutual benefits in terms of advocating for the sectors.	Peak bodies
Build cases for government support schemes for training and education	Build cases and nominate outdoor industry training and courses for inclusion in government support schemes, such as Fee Free TAFE, Skills First and Training Needs List, which offer subsidies from the Victorian Government and support accessibility for eligible students.	Peak bodies
Improve translation of university graduates' employability	Work with universities and employers to ensure a greater understanding of and improved translation of graduate's employment capacity. May need clarification within the AAAS to support this translation.	State/National Peak bodies

Professionalisation, training & development		
Longer-term strategies	Details	Required stakeholders
Further evaluation of AGSMs	Continue to evaluate the outcomes of Activity Group Skill Micro-credentials for industry, employer, workforce suitability and staff and aspiring employee professional development. Longitudinal evaluation can assess the number of short course participants that continue to enrol in further vocational and/or higher education.	Peak bodies, education system
Dual sector education system	Universities to explore how to support students' competency-based skills; TAFEs to explore how to improve graduates' soft skills, in line with AQF level remit. For example, short courses and micro-credentials may be embedded into other qualifications.	Education system, universities, TAFEs
Review of AAAS	<p>Include the following considerations in a review of the Australian Adventure Activity Standard:</p> <ul style="list-style-type: none"> ▪ Mental Health First Aid added to minimum standard ▪ Equivalent qualifications for the minimum standard ▪ Frequency of renewal (e.g., requalification every 1-3 years for Wilderness First Aid, CPR, certain skill sets and activities) ▪ Clarification within the AAAS of translation of university graduates' capacity 	Peak bodies
Training and education pathways	Strengthen industry-informed training and education pathways and explore opportunities for new and existing educational outdoor specific offerings (e.g., modules, customised programs, specialised technical degree, Master of Adventure Therapy).	Peak bodies, education system, universities, TAFEs
Strategy development	Engage in strategy development to build a strong strategic plan for the outdoor industry with shared goals, vision and mission. This will require exploration of the best ways to approach strategy development for the industry in terms of bringing together stakeholders, goal setting, clarifying a future vision for the industry and formulating a strategic plan to get there with indicators to measure success.	Peak bodies
Professionalisation structures	Explore similar industries professional structures for frameworks that would support the outdoor industry. E.g., Professional associations, unions, accreditation requirements.	Peak bodies, universities
Further research	Examine how to approach the broader OEIH project objective of 'Earn while you Learn' measurement and success in the long term.	Peak bodies, universities and government

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8.0 Appendices

Appendix A: Statistical analysis

CROSS TABULATION X – SALARY BRACKET AND PROFESSIONAL STATUS

What is your salary bracket in the outdoor industry? * What best describes your professional status? - Selected Choice
Crosstabulation

Count

		What best describes your professional status? - Selected Choice						Total
		Full-time employment	Part-time employment	Casual employment	Studying and working	Other (please specify)	Freelance	
What is your salary bracket in the outdoor industry?	\$18,200 or under	1	1	5	5	0	1	13
	\$18,201 - \$40,000	4	6	10	6	0	0	26
	\$40,001 - \$60,000	7	2	9	1	2	1	22
	\$60,001 - \$80,000	9	4	1	2	0	0	16
	\$80,001 - \$100,000	17	3	0	0	1	1	22
	\$10,001 - \$120,000	10	1	0	0	0	1	12
	\$120,001 - \$140,000	3	0	0	0	1	0	4
	\$140,001 - \$160,000	1	0	0	0	0	0	1
	\$180,001 or over	1	0	0	0	0	0	1
	Prefer not to say	2	2	0	0	0	0	4
Click to write Choice 12		0	0	1	0	1	0	2
Total		55	19	26	14	5	4	123

CROSS TABULATION X – SALARY BRACKET AND ROLE

Role	Salary										
	\$18,200 or under	\$18,201 - 40,000	\$40,001 - 60,000	\$60,001 - 80,000	\$80,000- 100,000	\$100,001 -120,000	\$120,001 - 140,000	140,001 - 160,000	160,001 - 180,000	\$180,001 or over	Prefer not to say
Outdoor activity guide/instructor	19.6%	28.6%	19.6%	10.7%	7.1%	1.8%	1.8%	0	0	1.8%	5.4%
Outdoor educator	10.6%	31.9%	21.3%	10.6%	12.8%	4.3%	4.3%	0	0	0	2.1%
Program officer	8.7%	26.1%	21.7%	21.7%	13.0%	0	0	0	0	0	4.3%
Other	9.5%	23.8%	9.5%	14.3%	14.3%	19.0%	0	4.8%	0	4.8%	0
Tour guide	10.0%	20.0%	40.0%	0	0	0	10.0%	0	0	10.0%	0
Program coordinator	0	3.6%	21.4%	32.1%	25.0%	3.6%	7.1%	0	0	0	7.1%
Kindergarten teacher	0	0	0	50.0%	50.0%	0	0	0	0	0	0
Primary School teacher	0	0	0	33.3%	50.0%	0	0	0	0	0	0
Secondary School teacher	3.7%	0	14.8%	3.7%	44.4%	22.2%	7.4%	0	0	0	0
TAFE teacher	14.3%	0	0	0	42.9%	28.6%	14.3%	0	0	0	0
University lecturer/tutor	11.1%	33.3%	0	0	44.4%	11.1%	0	0	0	0	0
Outdoor therapist	0	0	0	0	0	0	50.0%	0	0	0	50%

Appendix B: Tables

TABLE 1 – GENDER, AGE AND MINORITY GROUP IDENTIFY OF SURVEY RESPONDENTS

Variable	Response	Frequency	Percentage	Frequency	Percentage	Frequency	Percentage
		<i>Employers</i>		<i>Employees & volunteers</i>		<i>Aspiring volunteers</i>	
Gender	Male	28	68%	67	52%	55	45%
	Female	12	29%	60	47%	62	51%
	Non-binary	1	2%	1	1%	3	2%
	Prefer not to say	0	0%	0	0%	2	2%
Age	15 and under	0	0%	0	0%	5	4%
	16-17	0	0%	0	0%	38	30%
	18-25	1	2%	30	23%	30	24%
	26-35	17	41%	57	45%	23	18%
	36-45	12	29%	21	16%	20	16%
	46-55	6	15%	16	13%	9	7%
	56-65	3	7%	3	2%	2	2%
	66-75	1	2%	1	1%	0	0%
	76 and older	1	2%	0	0%	0	0%
Identity	Asylum seeker	0	0%	0	0%	0	0%
	Aboriginal or Torres Strait Islander	0	0%	1	1%	1	1%
	LGBTQIA+	6	15%	19	15%	13	12%
	CALD	1	2%	4	3%	5	5%
	Person with a disability	1	2%	3	2%	3	3%
	Prefer not to say	6	15%	7	6%	4	4%

TABLE 2 – BIRTH COUNTRY OF SURVEY RESPONDENTS

Variable	Response	Frequency	Percentage	Frequency	Percentage	Frequency	Percentage
		<i>Employers</i>		<i>Employees & volunteers</i>		<i>Aspiring employees</i>	
Country of birth	Australia	33	83%	113	88%	102	84%
	Canada					1	1%
	China					3	2%
	Colombia			1	1%		
	Eritrea					1	1%
	France	1	3%	2	2%		
	India	2	5%			1	1%
	Iran					1	1%
	Iraq					1	1%
	Ireland			1	1%		
	Kenya					1	1%
	Malaysia			1	1%	1	1%
	New Zealand			1	1%	2	2%
	Papua New Guinea					1	1%
	Singapore					1	1%
	Swaziland			1	1%		
	The former Yugoslav Republic of Macedonia	1	3%				
	United Kingdom	2	5%	7	5%	5	4%
	United States	1	3%			1	1%
	Zimbabwe			1	1%		

TABLE 3 –YEAR OF ARRIVAL IN AUSTRALIA OF SURVEY RESPONDENTS WHO WERE BORN OVERSEAS

Variable	Response	Frequency	Percentage	Frequency	Percentage	Frequency	Percentage
		<i>Employers</i>		<i>Employees & volunteers</i>		<i>Aspiring employees</i>	
Year of arrival in Australia	1969			1	7%		
	1973					1	5%
	1978					1	5%
	1986					1	5%
	1988					1	5%
	2000					1	5%
	2001			2	13%		
	2003	1	14%	3	20%		
	2007					1	5%
	2008					2	11%
	2009	1	14%	2	13%		
	2011			1	7%	2	11%
	2013			1	7%		
	2015			1	7%		
	2016	1	14%			1	5%
	2017	1	14%	2	13%		
	2019	1	14%			1	5%
	2020	1	14%			2	11%
	2022			2	13%	2	11%
	2023	1	14%			2	11%

TABLE 4 – CITIZENSHIP/VISA TYPE OF SURVEY RESPONDENTS WHO WERE BORN OVERSEAS

Variable	Response	Frequency	Percentage	Frequency	Percentage	Frequency	Percentage
<i>Employers</i>				<i>Employees & volunteers</i>		<i>Aspiring employees</i>	
Australian citizenship or visa type	Australian citizen			1	7%		
	Permanent resident					1	5%
	Student visa					1	5%
	Working holiday visa					1	5%
	Temporary work visa					1	5%
	Bridging visa					1	5%
	Other			2	13%		

TABLE 5 – ANCESTRY OF SURVEY RESPONDENTS

Variable	Response*	Frequency	Percentage	Frequency	Percentage	Frequency	Percentage
<i>*Respondents could select more than one answer</i>		<i>Employers</i>		<i>Employees & volunteers</i>		<i>Aspiring employees</i>	
Ancestry*	English	24	59%	67	53%	50	45%
	Irish	4	10%	32	25%	13	12%
	Scottish	6	15%	29	23%	17	15%
	Chinese			2	2%	5	5%
	Italian	2	5%	6	5%	7	6%
	German	2	5%	10	8%	2	2%
	Indian	2	5%			1	1%
	Greek			1	1%	5	5%
	Dutch	2	5%	5	4%	8	7%
	Australian	18	44%	58	46%	38	35%
	Other	6	15%	24	19%	26	24%

TABLE 6 – LANGUAGE/S OF SURVEY RESPONDENTS

Variable	Response*	Frequency	Percentage	Frequency	Percentage	Frequency	Percentage
<i>*Respondents could select more than one answer</i>		Employers		Employees & volunteers		Aspiring employees	
Language/s spoken at home*	English	41	100%	125	99%	107	97%
	Arabic			1	1%		
	Cantonese					2	2%
	Vietnamese	1	2%				
	Italian					2	2%
	Greek					2	2%
	Hindi	2	5%				
	Spanish			1	1%	3	3%
	Punjabi	1	2%				
	Other (please specify)			3	2%	7	6%

TABLE 7 – EMPLOYMENT STATUS OF SURVEY RESPONDENTS

Variable	Response	Frequency	Percentage	Frequency	Percentage	Frequency	Percentage
		Employers		Employees & volunteers		Aspiring employees	
Employment status	Full-time employment	34	83%	56	44%	17	15%
	Part-time employment	3	7%	19	15%	11	10%
	Casual employment	2	5%	26	21%	21	19%
	Studying and working	2	5%	16	13%	27	25%
	Volunteer			1	1%		
	Studying and volunteering			1	1%	2	2%
	Freelance			6	5%		

Self employed	1	1%	1	1%
Studying			22	20%
Unemployed and looking for work			9	8%

TABLE 8 – SALARY BRACKET OF SURVEY RESPONDENTS

Variable	Response	Frequency	Percentage	Frequency	Percentage	Frequency	Percentage
		<i>Employers</i>		<i>Employees & volunteers</i>		<i>Aspiring employees</i>	
Salary bracket	No income					19	17%
	\$18,200 or under			13	11%	37	34%
	\$18,201 - \$40,000	2	5%	26	21%	16	15%
	\$40,001 - \$60,000	7	17%	22	18%	7	6%
	\$60,001 - \$80,000	8	20%	16	13%	7	6%
	\$80,001 - \$100,000	7	17%	22	18%	4	4%
	\$100,001 - \$120,000	2	5%	12	10%	6	5%
	\$120,001 - \$140,000	8	20%	4	3%	1	1%
	\$140,001 - \$160,000	1	2%	1	1%	3	3%
	\$160,001 - \$180,000	1	2%				
	\$180,001 or over	2	5%	1	1%	1	1%
	Prefer not to say	3	7%	4	3%	9	8%

TABLE 9 – HIGHEST LEVEL OF EDUCATION OF SURVEY RESPONDENTS

Variable	Response	Frequency	Percentage	Frequency	Percentage	Frequency	Percentage
		<i>Employers</i>		<i>Employees & volunteers</i>		<i>Aspiring employees</i>	
Highest level of education	No formal school			1	1%	1	1%
	Primary school					3	3%
	Year 10/ equivalent	2	5%			22	20%
	Year 12/ equivalent/ VCE/ VCAL	1	2%	13	10%	34	31%
	Trade or technical qualification	1	2%	1	1%	2	2%
	Certificate	2	5%	14	11%	11	10%
	Diploma	10	24%	7	6%	5	5%
	Advanced Diploma			2	2%	3	3%
	Associate degree	1	2%	2	2%	2	2%
	Bachelor degree	11	27%	50	40%	16	15%
	Postgraduate certificate/diploma	9	22%	17	14%	4	4%
	Master degree	4	10%	16	13%	6	5%
	Doctorate/ PhD			1	1%	1	1%

TABLE 10 – TYPES OF COURSES COMPLETED BY SURVEY RESPONDENTS

Variable	Response*	Frequency	Percentage	Frequency	Percentage
		<i>Employers</i>		<i>Employees & volunteers</i>	
	<i>*Respondents could select more than one answer</i>				
Courses	Cert III Outdoor Leadership	1	2%	18	15%
	Cert II Outdoor Recreation	12	29%	40	32%
	Cert IV Guiding	2	5%	7	6%
	Dip Outdoor Leadership	4	10%	4	3%

Dip Outdoor Recreation	6	15%	7	6%
Dip Outdoor Education	1	2%	2	2%
Bach OE (Environmental Science, Sustainability, Sport & PE)				
Bach Outdoor Leadership	2	5%	5	4%
Bach Education (OE)	4	10%	10	8%
Bach Physical Education	6	15%	12	10%
Bach Tourism (Nature Tourism, Ecotourism)				
Other	12	29%	53	43%
Bach OE (Environmental Science, Sustainability, Sport & PE)				

TABLE 11 – MAIN PLACE/S OF OPERATION

Variable	Response*	Frequency	Percentage
<i>*Respondents could select more than one answer</i>		Employers	
State/ Territory	VIC	22	67%
	NSW	13	39%
	QLD	4	12%
	WA	4	12%
	ACT	3	9%
	SA	3	9%
	NT	2	6%
	TAS	2	6%
	Outside Australia	0	0%

TABLE 12 – MAIN MARKETS

Variable	Response*	Frequency	Percentage
<i>*Respondents could select more than one answer</i>		Employers	
Market	Schools - Secondary school students	27	82%
	Schools - Primary school students	16	48%
	Domestic tourists (intrastate and interstate visitors)	14	42%
	Corporate professionals	8	24%
	International tourists	8	24%
	People with disabilities	4	12%
	Vocational education (TAFE, RTO) students	3	9%
	Schools - Kindergarten students	2	6%
	University students	2	6%
	Other (please specify)	2	6%

TABLE 13 – SERVICE/S PROVIDED

Variable	Response*	Frequency	Percentage
<i>*Respondents could select more than one answer</i>		Employers	
Service/ experience	Overnight multi-day camping/ journey-based activities away from venues	21	64%
	Overnight multi-day residential/ 'hard top' venue camps	18	55%
	Single day activities and experiences – in the field/ on public land	15	45%
	Single day activities and experiences – at venues/ camps	9	27%
	Overnight multi-day journeys using accommodation such as lodges and other tourist accommodation	7	21%

Outdoor therapy	1	3%
Other	1	3%

TABLE 14 – ROLES OF EMPLOYERS

Variable	Response*	Frequency	Percentage
<i>*Respondents could select more than one answer</i>		Employers	
Roles	CEO/Director	14	34%
	Mid-level Manager	12	29%
	Other	8	20%
	Senior Manager	6	15%
	Owner and manager	3	7%
	Human Resources Manager	2	5%
	Professional Development Manager	2	5%

TABLE 15 – SIZE OF BUSINESSES

Variable	Response*	Frequency	Percentage
<i>*Respondents could select more than one answer</i>		Employers	
Size of business	Small business (between 5-19 employees)	14	42%
	Medium business (between 20-199 employees)	14	42%
	Micro-business (between 1-4 employees)	2	6%
	Large business (200+ employees)	2	6%
	Non-employing business (sole proprietorship and partnerships solely employing self/partner)	1	3%

TABLE 16 – NUMBER OF STAFF TYPES EMPLOYED

Variable	Response	Frequency	Percentage
		Employers	
Type of staff	Outdoor educators	18	72%
	Trainees	13	52%
	Outdoor ed teachers – Secondary School (7-12)	8	32%
	Outdoor ed teachers – Primary School (F-6)	2	8%
	Outdoor ed teachers – University Lecturer/ Tutor	2	8%
	Other	2	8%
	Outdoor education teachers – TAFE Teacher	1	4%
	Outdoor activity guides/instructors (e.g., climbing, skiing)	0	0%
	Outdoor education teachers – Kindergarten	0	0%
	Outdoor therapists (e.g., bush adventure therapist, adventure intervention officer)	0	0%

Program officers (e.g., delivering programs, leading groups on-the-ground)	0	0%
Program coordinators (e.g., planning and managing programs)	0	0%

TABLE 17 – ROLES OF EMPLOYEES

Variable	Response*	Frequency	Percentage
<i>*Respondents could select more than one answer</i>		Employees	
Roles	Outdoor activity guide/instructor	57	46%
	Outdoor educator	48	39%
	Program coordinator	28	23%
	Secondary School teacher	27	22%
	Program officer	24	19%
	Other	21	17%
	Tour guide	10	8%
	University lecturer/tutor	9	7%
	Primary School teacher	6	5%
	TAFE teacher	7	6%
	Kindergarten teacher	2	2%
	Outdoor therapist	2	2%

TABLE 18 – ROLES OF INTEREST FOR ASPIRING EMPLOYEES

Variable	Response*	Frequency	Percentage
<i>*Respondents could select more than one answer</i>		Aspiring employees	
Role/s of interest	Outdoor activity guide/instructor	76	78%
	Outdoor educator	61	63%
	Tour guide	48	49%
	Program officer	43	44%
	Outdoor therapist	35	36%
	Program coordinator	32	33%
	Secondary School teacher	26	27%
	Primary School teacher	22	23%
	Kindergarten teacher	14	14%
	TAFE teacher	14	14%
	University lecturer/tutor	8	8%
	Other	7	7%

TABLE 19 – PERCIEVED BARRIERS TO ENTRY AND CAREER OPPORTUNITIES BY GROUP

Barriers to entry and career opportunities	Employer perceptions	Employee and Volunteer perceptions	Aspiring Employee perceptions
Low salary	83%	60%	40%
Working hours	79%	33%	40%
Lack of defined career pathway	54%	25%	30%
Family responsibilities	50%	36%	20%
Seasonal insecure work	42%	29%	40%
The work required	38%	16%	10%
Physical capacity	33%	20%	30%
Parental attitudes	33%	8%	0%
Residential location	25%	24%	30%

Appendix C: Interviewee attributes

Number	Stakeholder type	Cultural background	Gender	Pseudonym
1	Industry expert	Australia	Male	P1
2	Industry expert	Australia	Male	P10
3	Industry expert	Australia	Male	P4
4	Industry expert	Australia	Male	P5
5	Industry expert	Australia	Male	P7
6	Industry expert	Australia	Male	P37
7	Industry expert	Australia	Male	P12
8	Employer	Australia	Female	P2
9	Employer	France	Female	P3
10	Employer	Germany	Female	P8
11	Employer	India	Female	P9
12	Employer	Australia	Male	P27
13	Employer	Australia	Female	P35
14	Employee	First Nations	Female	P6
15	Employee	Australia	Male	P11
16	Employee	Australia/ New Zealand	Female	P13
17	Employee	Australia/ Lebanon	Male	P14
18	Employee	Australia/ Malaysia	Female	P15
19	Employee	Australia	Non-binary	P25
20	Employee	Australia	Male	P26
21	Employee	Australia	Female	P28
22	Employee	Australia	Female	P29
23	Employee	First Nations	Female	P36
24	Employee	First Nations	Female	P38
25	Employee	Australia	Male	P23
26	Volunteer	Australia	Female	P40
27	Prospective employee	Thailand/ England	Female	P16
28	Prospective employee	Iran/ Australia	Male	P17
29	Prospective employee	Australia	Male	P18
30	Prospective employee	Australia	Male	P19
31	Prospective employee	Australia	Male	P20
32	Prospective employee	Singapore	Female	P21
33	Prospective employee	Australia	Male	P22

34	Prospective employee	Australia/ England	Female	P24
35	Prospective employee	Australia	Female	P30
36	Prospective employee	Australia/ Italy	Male	P31
37	Prospective employee	Australia/ Canada	Female	P32
38	Prospective employee	Australia	Male	P33
39	Prospective employee	Africa	Female	P34
40	Prospective employee	Africa/ Australia	Female	P39