2013

National Outdoor Sector Survey

Outdoor Council of Australia

SERVICE SKILLS AUSTRALIA

Acknowledgements

The 2013 National Outdoor Sector Survey was undertaken as a joint project between the Outdoor Council of Australia and Service Skills Australia.

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This document is supported and endorsed by the outdoor recreation industry. Whilst the document sits with Service Skills Australia (the Industry Skills Council for the outdoor recreation sector) it is owned and maintained by the sector, for the sector. Service Skills Australia acknowledges the contribution of the Sport, Fitness and Recreation Industry Advisory Committee in the preparation of this document.

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+61 2 8243 1200
Level 10, 171 Clarence Street Sydney NSW 2000
www.serviceskills.com.au

Survey overview

The National Outdoor Sector Survey (NOSS) was undertaken by Service Skills Australia (SSA) in conjunction with the Outdoor Council of Australia (OCA) in 2010 and 2013 with the aim to gain insight into the profile of the workforce in the outdoor recreation sector.

The 2013 survey received 471 responses nationally. After data cleaning and removal of any duplicate responses, the analysis contained in this report is based on the responses from 275 organisations. The responses of sole traders have not been included in this analysis. Given the small number of responses overall, and in particular for certain questions, we advise that there be a degree of caution used when considering the results.

The report has been split into three main sections; the first being an overview of the organisations that responded to the survey, the second section deals with current paid workforce trends and the third section looks at the volunteer workforce.

Each of the sections highlights the main discussion points that can be taken from the survey data and uses this and anecdotal information from our interactions with industry to pose key questions with the intention of triggering ongoing discussions within the sector.

The hope for the survey was that by gathering data on a regular basis the survey could help to fill the gaps in workforce data that currently exists in the sector due to the lack of usable data being collected by the Australian Bureau of Statistics.

To be able to provide a better picture of the sector as a whole the research will need to be more widely promoted to the industry to highlight to them its value in identifying where the sector is headed.

Key Messages

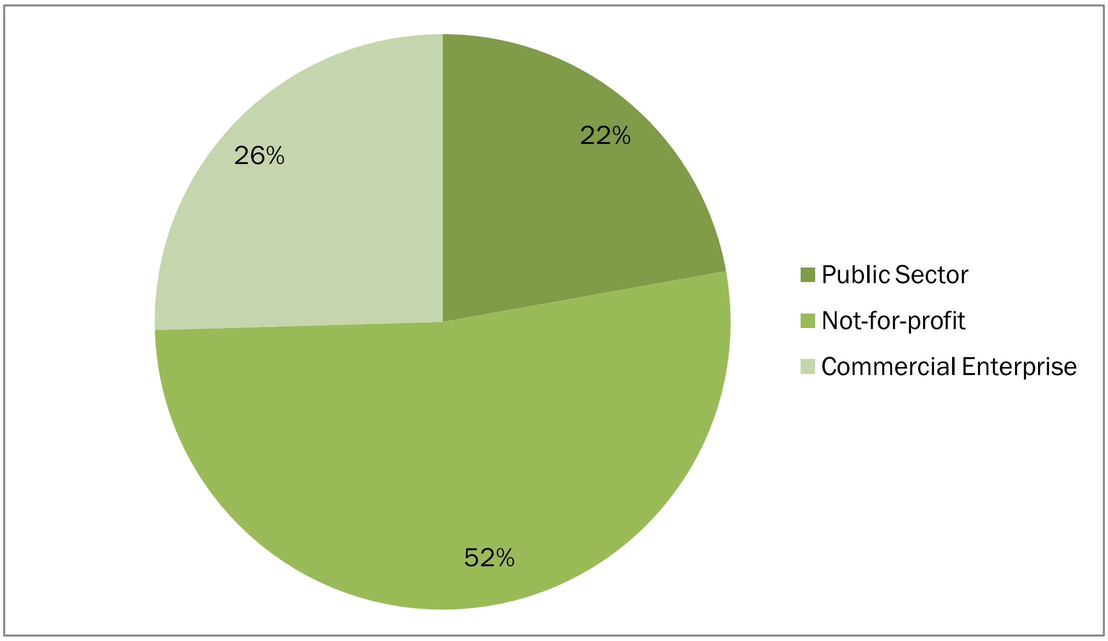
The key findings from the research are as follows:

- Outdoor Adventure Leaders are in high demand in the industry.
- The need for Outdoor Adventure Leaders is expected to continue to increase.
- The majority of roles in the sector are offered on a part-time/casual basis.
- Outdoor Adventure Leaders need to be skilled in at least 5 activities.
- Formal training or professional registration is not seen as a priority for the industry with the focus being on relevant experience.
- Average staff turnover is 17.2% within organisations that answered the survey. This is slightly higher than the national average across all industries which is 13% but many organisations claim to retain staff for 10+ years.
- Cost and accessibility are the main reasons given for no training being provided.
- Demand for volunteers in the industry continues to be high but retention is an issue.
- Training for volunteers is not seen as a necessary investment by organisations that participated in this survey.

Respondent organisation overview

Of the 275 organisations that responded to the survey the breakdown by sector is outlined in Figure 1 below. The majority of organisations that replied to the survey identified themselves as not-for-profit organisations with the remainder split approximately 50/50 across the public sector and commercial enterprises. It is noteworthy that in 2010 it was also the not-for-profit sector that represented the largest section of the sample.

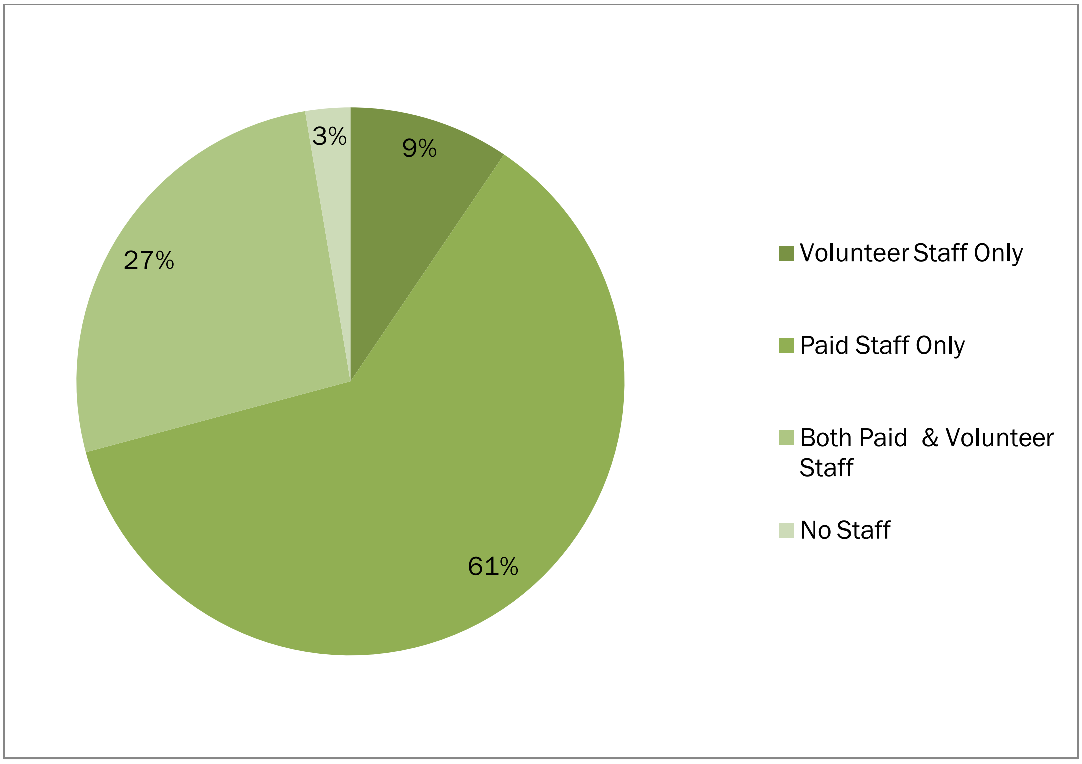
Figure 1: Percentage share of respondent organisations by institutional type. (n=275)



Type of respondent organisation

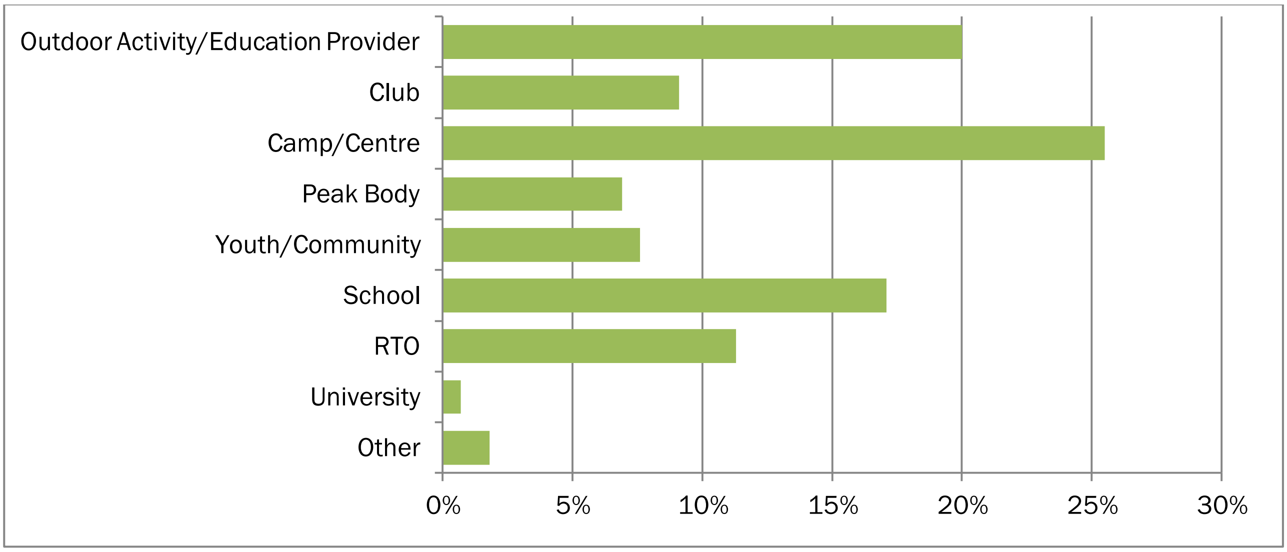
The share of different types of staff that are employed or engaged by the organisations is outlined below in Figure 2. The majority utilise paid staff (81%), with approximately a third of these companies also employing volunteers. A small portion of organisations rely solely on volunteer workers and there was also a small proportion that indicated they had no staff and it is assumed that these are sole operators. The high number of volunteer staff used can be explained by the number of not-for-profit organisations in the sample where more volunteer staff are required due to funding/budget constraints.

Figure 2: Percentage share of respondent organisations by staff type. (n=275)



Organisations were asked to specify their goods and service provision in the industry with the largest proportion of organisations identifying themselves as camps or centres, followed by outdoor providers and schools. Respondents could select more than one response with 67 organisations (24%) identifying themselves as having more than one function.

Figure 3: Percentage Share of Organisations by Main Goods and Service Provision Type. (n=275)[1]



[1]Outdoor Activity/Education Provider' subsumes the categories of Outdoor Activity and Tour providers and Outdoor Education providers due to the degree of overlap between these categories.

The majority of respondent organisations (85%) indicated that they provide outdoor activities and within these organisations the most commonly provided activities were bushwalking, camping and canoeing/kayaking, as outlined in Table 1 below. Over 90% of organisations indicated that they provide more than one activity.

Table 1: Number and percentage share of activity-providing organisations by activity provision (n=235)

Activity Provided	Number	Percent
Bushwalking	194	70.50%
Camping	190	69.10%
Canoeing/ Kayaking	187	68.00%
Team building activities	169	61.50%
Abseiling	156	56.70%
Ropes courses	140	50.90%
Rock climbing	138	50.20%
Orienteering	136	49.50%
Mountain biking/ Cycling	134	48.70%
Expeditioning	125	45.50%
Nature studies	93	33.80%
Archery	91	33.10%
Conservation activities	81	29.50%
Flying Fox	81	29.50%
Boating/ sailing	69	25.10%
Surfing	64	23.30%
Snorkelling	61	22.20%
Caving	57	20.70%
Rogaining	57	20.70%
Fishing	56	20.40%
Skiing	50	18.20%

Activity Provided	Number	Percent
Horse riding	37	13.50%
White water rafting	37	13.50%
Snow-boarding	36	13.10%
Canyoning	34	12.40%
Scuba diving	25	9.10%
Stand up paddle boarding	25	9.10%
Surf life saving	25	9.10%
Four-wheel-driving	24	8.70%
Kite flying	20	7.30%
Fossicking/ Collecting	14	5.10%
Trail running	12	4.40%
Motor/ Trail bike riding	11	4.00%
Sail-boarding	9	3.30%
Kite surfing	4	1.50%
Skateboarding	4	1.50%
Other	4	1.50%
Jet skiing	3	1.10%
Rollerblading	3	1.10%
Hang/Para gliding	2	0.70%
Bungee jumping	0	0.00%

Location of respondent organisations

The large majority of respondent organisations are state based (with either single site or multiple sites in that state) as displayed in Figure 4. The national distribution of these single state organisations is shown in Figure 5. There was a relatively low response rate from organisations located in Victoria and this should be taken into consideration when using the results, with the largest amount of responses from organisations being based in New South Wales and Queensland. As a result it is not possible to analyse the data based on state.

Figure 4: Dispersal of organisations by site location (n=275)

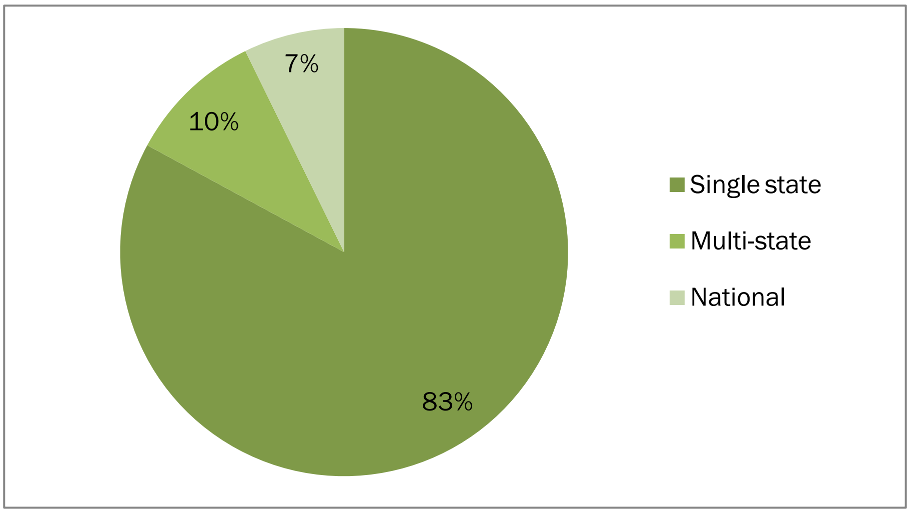
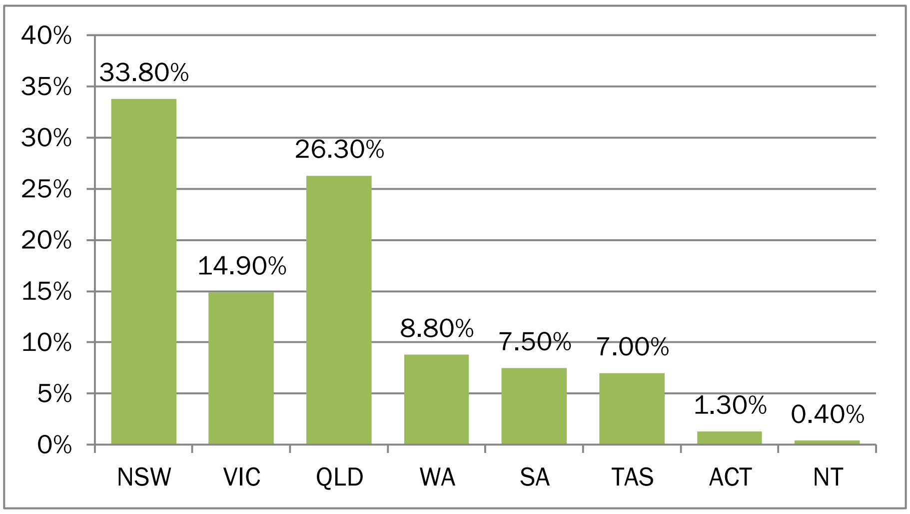
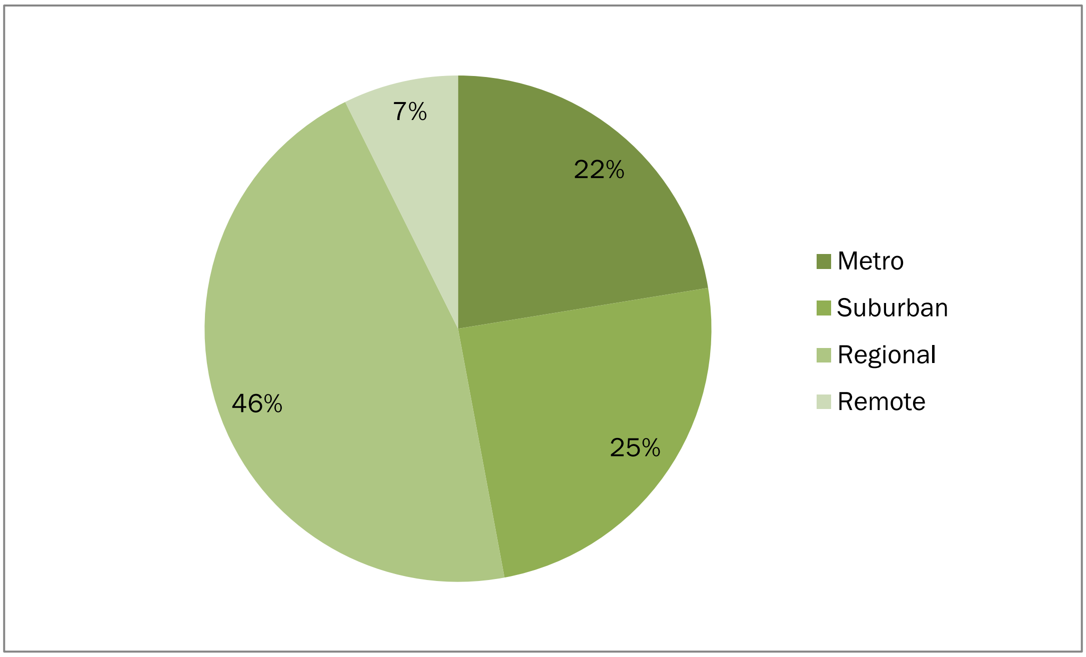


Figure 5: Percentage share of single state organisations by state location. (n=228)



A small proportion of organisations surveyed considered their location to be remote with the majority of organisations identifying themselves as being based in regional locations. Additionally, almost half of the organisations identified themselves as located in Metro or Suburban locations.

Figure 6: Percentage share of respondent organisations by location type. (n=273)



Key issues affecting paid staff

This section outlines the key findings in relation to the issues that affect paid staff in the outdoor sector. The data for organisations that engage both paid staff and volunteers have been included in this analysis. There are five keys issues covered in this section: current workforce and staffing needs, sources of labour, outdoor adventure leader recruitment and training and development.

Current workforce and staffing needs

The average number of staff employed per organisation is outlined below in Table 2 along with the split of full time and part time staff. Table 3 is the same data but it has been adjusted to remove the effect of size, which is a more accurate representation of the actual make up of the industry.

The average share of part time and full time staff indicates that part time staff account for 54% of all staff employed, supporting the anecdotal reports of the high proportion of part time workers in the outdoor sector. Part time in this report is defined as staff who work less than 35 hours per week on average.

Table 2: Key employment statistics.[2] (n=204)

Average Number of Staff per Organisation	49
Average Number of Full Time Staff (35+ hours a week) per Organisation	28
Average Number of Part Time Staff (<35 hours a week) per Organisation	21

Table 3: Employment figures adjusted to remove the effect of size. (n=204)

Average Share of Full Time Staff per Organisation (35+ hours a week)	47%
Average Share of Part Time Staff per Organisation (<35 hours a week)	54%[4]

[2] Organisation 'TAFE' (outlier) excluded for average purposes.
[4] Ratio of full to part time does not equal 100% due to an allowed margin of error.

It can be seen in Table 4 that based on the survey responses, part time work in this sector is concentrated in the role of Outdoor Adventure Leader.

According to the responses from 143 organisations, there were 1,237 Outdoor Adventure Leaders recorded as being in employment at the time of the survey was undertaken. This was broken down into 987 part-time workers and 250 full-time workers.

Table 4: Average number of paid positions by occupation per organisation. (n=143)

Job Role	Full Time	#	Part Time	#
Chief Executive/ Managing Director	0.7	98	0.2	29
Manager	1.0	143	0.0	4
Human Resources Manager	0.1	15	0.0	5
Volunteer Manager	0.0	4	0.0	3
IT/ Finance/ Operations Manager	0.4	63	0.1	20
Program Manager	0.8	121	0.1	19
Outdoor Adventure Leader	1.7	250	6.9	987
Outdoor Coordinator	0.2	34	0.3	43
Workplace Trainer and/ or Assessor	0.1	12	0.1	18
Outdoor Teacher – Schools	0.7	107	0.8	115
Outdoor Recreation Teacher/ Trainer - Voc. Ed.	0.3	40	0.8	121
Outdoor Recreation Teacher/ Lecturer - Higher ed.	0.2	33	0.1	16
Administration	0.9	133	0.7	98
Reception/ Customer Service	0.6	79	0.3	43
General Maintenance (Groundsperson, cleaner, etc.)	0.9	135	1.0	142
Chef/ Cook	0.6	90	1.3	186

Fifty organisations indicated that they had at least one vacancy at the time of the survey, with the total number of vacant positions for each role displayed in Table 5. Again, Outdoor Adventure Leader positions were the highest ranking on the list of vacancies.

Table 5: Total number of current vacancies by job role. (n=193)

Job Role	Total
Outdoor Adventure Leader (Guide/ Instructor)	203
Outdoor Recreation Teacher/ Trainer – Voc. Ed.	36
Chef/ Cook	18
Program Manager	11
Volunteer Manager	9
General Maintenance	9
Outdoor Coordinator	6
Administration	5
Reception/ Customer Service	5
Manager	4
Workplace Trainer and/ or Assessor	3
Outdoor Teacher - Schools	2
IT/ Finance/ Operations Manager	1

The current employment figures of Outdoor Adventure Leaders identified previously in Table 3 together with the 203 vacancies identified in Table 4 implies that, based on the responses of 193 organisations at the time of this survey, a total of approximately 1,440 Outdoor Adventure Leaders are currently employed or required.[3]

The 2011 Census estimated that 1,859 Outdoor Adventure Leaders were employed nationally, with 1,071 full-time workers and 636 part-time workers. Given that this survey was based on a small proportion of organisations in the industry and has managed to account for close to all of the employed Outdoor Adventure Leaders, this gives weight to the industry's long-held belief that the Census figures severely under represent the actual number of workers in the industry. However, the reversal in the prominence of part-time workers between this survey and the Census results suggest there could be a double-counting of workers in this survey who work full-time hours through holding a number of part-time jobs at more than one organisation.

It is also of note that 43.8% of organisations reported having difficulties finding staff, with the highest proportion of respondents having particular difficulty recruiting Outdoor Adventure Leaders. This implies that there may be a shortage of recruits available to fill this role. This theory has been supported by anecdotal information from the industry, with suggestions that it could be related to the casual and part-time nature of jobs available.

Table 6: Roles that organisations have difficulty finding staff. (n=185)

Job Role	Total	Percent
Outdoor Adventure Leader	58	31.4%
Chef/ Cook	15	8.1%
Outdoor Recreation Teacher/ Trainer - Voc. Ed.	14	7.6%
General Maintenance	13	7.0%
Manager	12	6.5%
Program Manager	12	6.5%
Outdoor Coordinator	10	5.4%
Outdoor Teacher - Schools	9	4.9%
Administration	8	4.3%

[3] Please note that this figure is not a full time equivalent figure due to respondents not being required to differentiate between full time and part time vacancies.

Reception/ Customer Service	8	4.3%
Workplace Trainer and/ or Assessor	6	3.2%
Outdoor Recreation Teacher/Lecturer - Higher Ed.	4	2.2%
Chief Executive/ Managing Director	3	1.6%
IT/ Finance/ Operations Manager	3	1.6%
Human Resources Manager	2	1.1%
Volunteer Manager	1	0.5%
No difficulty finding staff	104	56.2%

Question for industry: Given what has been outlined above and that the Outdoor Adventure Leader role is primarily part-time/ seasonal, what strategies are being implemented by employers to attract and retain applicants in these roles?

The majority of organisations that took part in this survey have indicated that they either provide or encourage employees to undertake formal training in order to help meet their recruitment needs. Approximately a third of respondents also indicated that they were establishing more flexible work arrangements, recruiting apprentices/ trainees, creating structured career paths and/or subcontracting some business functions out of the organisation.

The primary reasons identified for the difficulty in recruiting staff is that applicants did not have the required qualifications, education or skills. This was primarily attributed to training that was either unavailable, unaffordable or of poor quality.

Table 7: Organisational actions to address recruitment difficulties. (n=79)

Action	Total	%
Providing formal or informal training for employees	53	67.1%
Encouraging employees to undertake formal training	43	54.4%
Establishing more flexible/ improved work arrangements	29	36.7%
Recruiting apprentices or trainees	29	36.7%
Creating structured career paths for employees	27	34.2%
Sub-contracting some functions out of the business	26	32.9%
Making a concerted effort to attract more diverse sources of labour (e.g. indigenous people, mature age workers etc.)	17	21.5%
Restructuring the business	9	11.4%
We have not responded in any way	6	7.6%
Other	1	1.3%

It was also indicated by many that recruitment difficulties were due to applicants not having adequate work experience, as shown in Table 8, yet Table 9 indicates that only a quarter of respondents believed that there was a lack of opportunities to gain experience. This would suggest that the retention of staff with experience within the industry is a key issue.

Table 8: Reasons for recruitment difficulties. (n=80)

Reason	Total	%
Applicants didn't have the required qualifications or education	50	62.5%
Applicants didn't have the required skills	47	58.8%
Applicants didn't have the right work experience	39	48.8%
Lack of applicants	39	48.8%
Applicants lacked the appropriate flexibility for the role	28	35.0%
Employers from other industries were more attractive	14	17.5%
Outdoor recreation employers in other locations were more attractive	11	13.8%
Other outdoor recreation local employers were more attractive	9	11.3%
Other	2	2.5%

Table 9: Reasons for the lack of available staff. (n=78)

Reason	Total	%
There is a lack of available/ affordable training	46	59.0%
There is a lack of quality training courses	36	46.2%
The content being taught is not aligned with business needs	25	32.1%
There are a lack of opportunities to gain relevant work experience	21	26.9%
The attitude of candidates is ill-suited to the role	14	17.9%
The aptitude of candidates is ill-suited to the role	13	16.7%
There is a high drop-out rate in training	11	14.1%
Unsure	11	14.1%
Candidates have poor literacy and numeracy	6	7.7%
Other	2	2.6%

Question for industry: What are the barriers to providing affordable training?

Question for industry: What impact does informal training have on workforce mobility within the industry?

Sources of Labour

Approximately 16.5% of respondent organisations indicated they had at least one member of staff employed on an international visa. Figure 7 displays that international employees are most commonly on temporary skilled migration visas (e.g. 457) or are working holiday makers.[5]

Table 10 shows that international staff are most likely to be employed in the role of Outdoor Adventure Leader as would be expected based on the shortage of candidates identified in the previous section.

Figure 7: Percentage share of total international staff by visa type. (n=28)

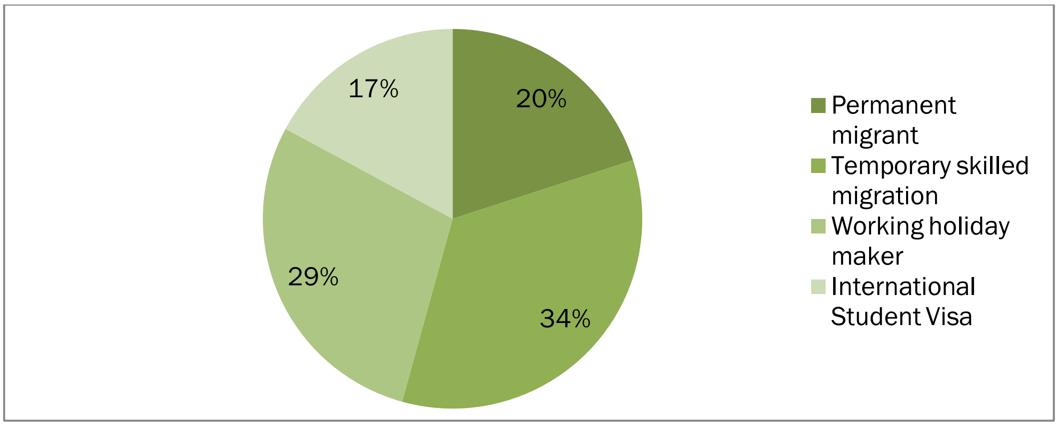


Table 10: Total number of workers on visas by occupation. (n=28)

Job Role	Total
Outdoor Adventure Leader	17
Program Manager	6
Manager	4
Chef/ Cook	3
Administration	2
General Maintenance	2
Workplace Trainer and/ or Assessor	1
Outdoor Teacher - Schools	1

[5] Note that this is based on a small sample size and there was missing data for four organisations.

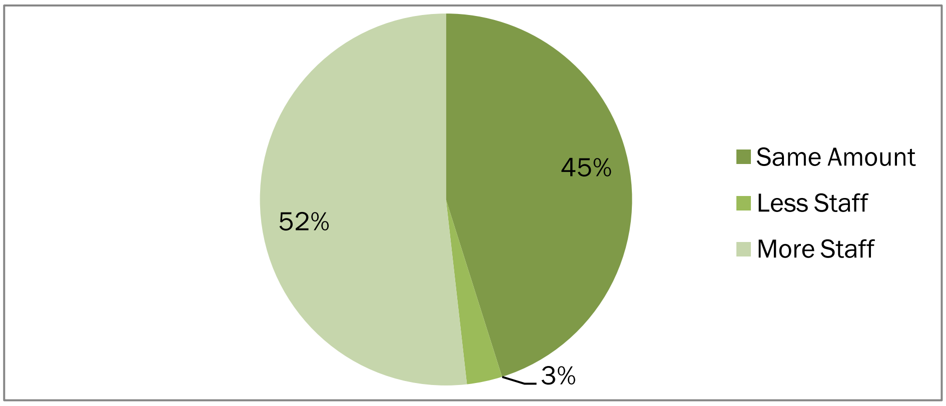
Out of 195 respondents, 41% of organisations had hired staff to fill new roles in the preceding 12 months with a total of 1.3 new staff hired on average. Additionally, the majority of respondents indicated that they had replaced all staff that had departed but approximately a quarter reduced staff numbers by not replacing those positions. The remainder of respondent organisations claimed to have no departures.

Table 11: Number and share of replaced paid staff following departures. (n=195)

Organisation Action	Total	%
Replaced all departures	85	43.6%
Partially replaced departures	19	9.7%
Did not replace departures	32	16.4%
Had no departures	59	30.3%

It is also noteworthy that very few organisations predict that they will have less staff in the next 12 months, with the majority expecting to expand on their current workforce.

Figure 8: Percentage share of respondent organisations by forecast recruitment needs in the next 12 months. (n=195)



Question for industry: It has been indicated that there is growth occurring in the sector, what would you attribute this growth to?

Table 12, similar to the results from Table 5, indicates that the future need for staff is estimated to primarily be in the roles of Outdoor Adventure Leader followed by Vocational Education Teacher and Chefs/Cook.

As many as an additional 454 Outdoor Adventure Leaders are expected to be required in 2014, representing a growth rate of 32% based on current employment and vacancy figures in this report.[6]

Table 12: Total forecast recruitment demand in the next 12 months by job role. (n=195)

Job Role	Total
Outdoor Adventure Leader	454
Outdoor Recreation Teacher/ Trainer - Voc. Ed.	34
Chef/ Cook	26
General Maintenance	21
Program Manager	18
Outdoor Teacher - Schools	17
Administration	15
Manager	12
Workplace Trainer and/ or Assessor	12
Volunteer Manager	10
Reception/ Customer Service	10
Outdoor Coordinator	7
IT/ Finance/ Operations Manager	5

[6] These figures are not full time equivalent due to respondents not being required to differentiate between full time and part time vacancies and future employment requirements.

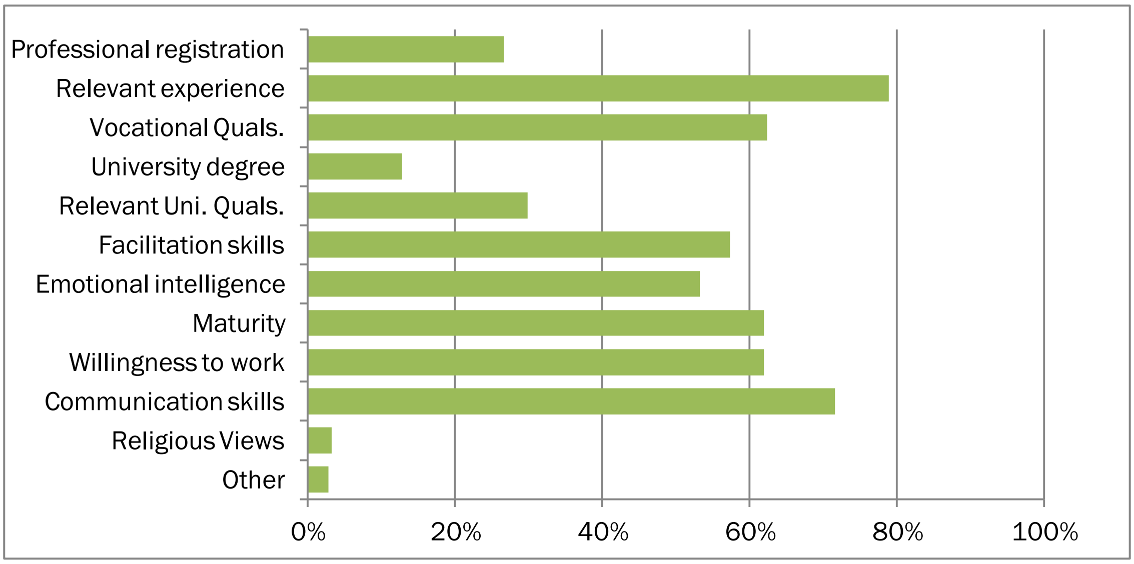
Question for industry: What effect will it have on the industry if these Outdoor Adventure Leader roles cannot be filled by appropriately qualified staff?

Outdoor adventure leader recruitment

Given the prominence of the job role of Outdoor Adventure Leaders in this sector, analysis was conducted on the factors affecting recruitment for this particular role.

The organisations in this survey identified that the most common criteria used when hiring Outdoor Adventure Leaders is relevant experience, closely followed by communication skills. Vocational qualifications were used as a criteria for recruitment by only 62% of organisations. This was followed by the 'employability skills' of maturity, willingness to work, facilitation skills and emotional intelligence.

Figure 9: Criteria used when hiring outdoor adventure leaders. (n=161)

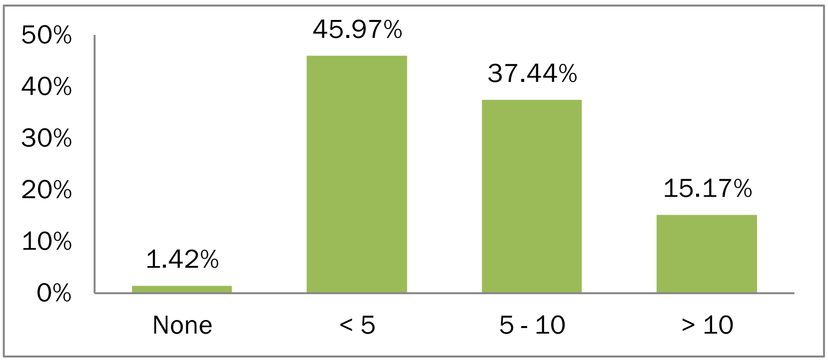


It is noteworthy that professional registration is not commonly used as criteria for recruitment. This raises the question of whether professional registration provides any benefit to individuals that undertake it, or to those businesses that employ Leaders with registration—perhaps it is not being widely marketed to the public as a standard that identifies bona fide Outdoor Adventure Leaders.

Question for industry: What should NOLRS offer to increase industry awareness and take up?

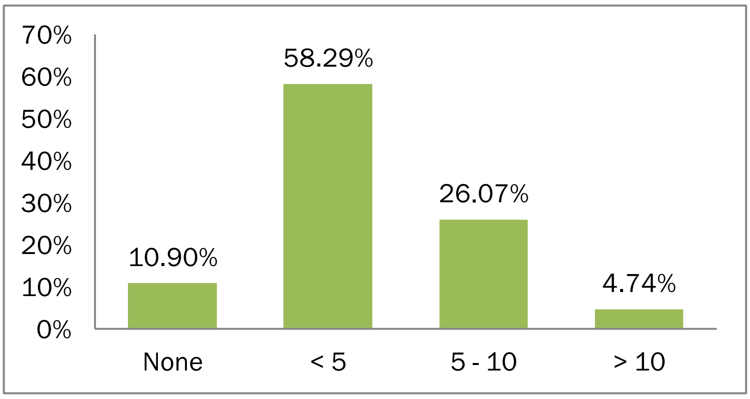
The majority of respondents indicated that Outdoor Adventure Leaders were expected to deliver between 1-5 activities, as indicated in Figure 10, with the average being 7 activities which has also been supported by anecdotal information provided by the industry. However, over 10% of organisations indicated that they did not require Outdoor Adventure Leaders to hold any qualifications or professional registration in the activities being provided, see Figure 11. This is expected given the large share of organisations that identified relevant experience to be a key factor taken into consideration when hiring Outdoor Adventure Leaders.

Figure 10: Number of activities outdoor adventure leaders are expected to deliver. (n=211)



Question for industry: What is the optimum number of activities Outdoor Adventure Leaders should be qualified in to maximise their employability?

Figure 11: Number of activities Outdoor Adventure Leaders must be qualified or have professional registration in (n=211)



Question for industry: Does the current training package allow staff to be skilled in a sufficient number of activities to meet industry need?

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Level 10, 171 Clarence Street Sydney NSW 2000
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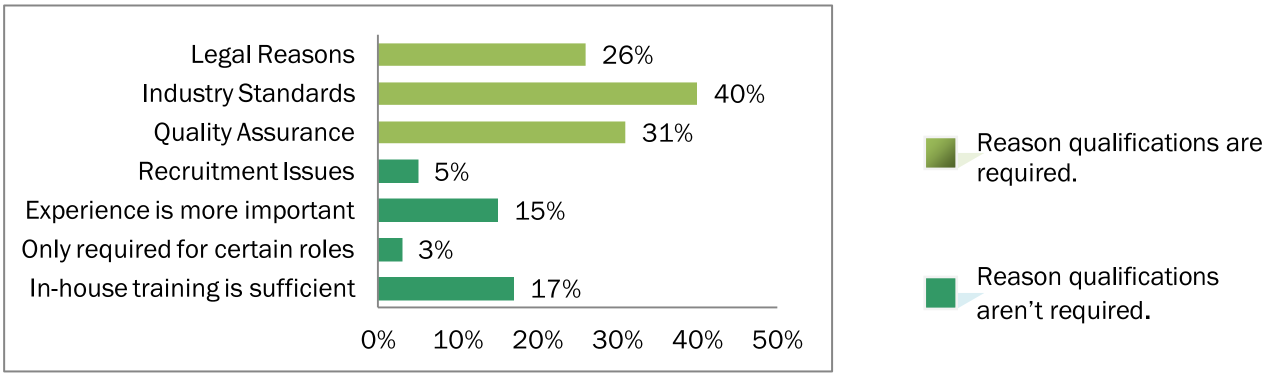
A majority of organisations stated that their reasons for employing qualified staff were to meet the industry standards, for legal reasons (i.e. regulatory or insurance compliance) or quality assurance. Conversely, the main reasons given as to why formal qualifications were not required was that relevant experience is more important to employers and the belief is that in-house training is sufficient to provide leaders with skills needed to undertake the role, as shown in Figure 12.

Figure 12: Reasons for or against requiring qualified outdoor leaders (n=187).[7]



This data implies that, while there is significant industry support for qualified staff in order to provide a high quality and safe service, there are some employers that do not value qualifications.

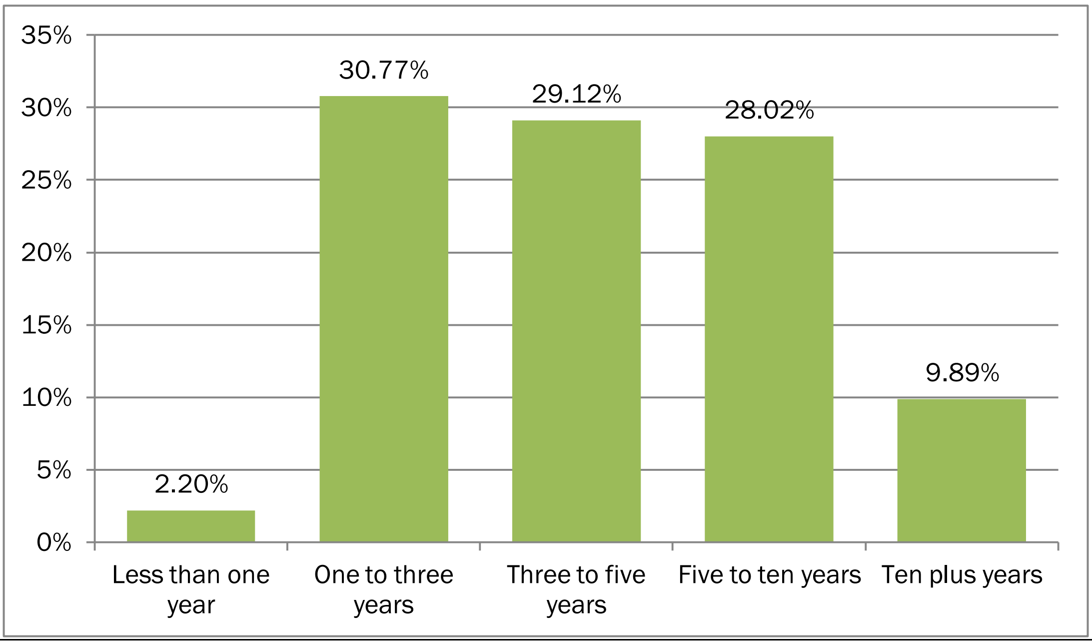
[7] Open responses, back coded into appropriate categories

Staff retention

On average, respondent organisations estimate that they have an annual staff turnover rate of 17.2% (i.e. on average, 17.2% of each organisation's staff leave each year), which is slightly higher than the rest of Australian industries according to surveys run by the Australian Human Resources Institute and the Australian Institute of Management, in which the average staff turnover rate across all industries is approximately 13%.

As indicated in Figure 13, there is an equal share of organisations that are able to retain staff for either an average of less than 3 years, 3-5 years or 5-10 years. Surprisingly, some organisations have also indicated that they tend to retain staff beyond ten years on average.

Figure 13: Share of respondent organisations by average staff retention duration. (n=182)



Out of 182 respondents, 13.7% organisations indicated that they have difficulty retaining staff. Although this number is relatively small, it can be seen from Table 13 below that retention primarily relates to the role of Outdoor Adventure Leaders. Of the respondents who indicated that they had retention difficulties, the overwhelming reason given was the short term seasonal/ casual nature of the work, which has been identified earlier in this report.

This reiterates the need for the industry to come up with an innovative solution to address the transient nature of the workforce and offer staff flexible employment options to entice them to stay in the workforce long term.

Table 13: Number of respondent organisations indicating retention difficulties by job role. (n=25)

Job Role	Number of organisations	Share of organisations
Outdoor Adventure Leader	19	10%
Chef/ Cook	3	2%
Manager	2	1%
Program Manager	2	1%
Outdoor Coordinator	2	1%
Outdoor Teacher – Schools	2	1%
Outdoor Recreation Teacher/ Trainer - Voc. Ed.	2	1%
General Maintenance	2	1%
Human Resources Manager	1	1%
Administration	1	1%
Workplace Trainer and/ or Assessor	0	0%
Outdoor Recreation Teacher/ Lecturer - Higher Ed.	0	0%
Reception/ Customer Service	0	0%
No difficulty retaining staff	159	82%

Table 14: Share of respondent organisations by reason for difficulty retaining staff. (n=38)

Reason	Total	%
Seeing the role as a short-term option or due to seasonal/casual nature	30	78.9%
Not being able to progress their career any further	15	39.5%
Dissatisfaction with the conditions (e.g. hours)	13	34.2%
Dissatisfaction with the pay	10	26.3%
Staff being poached by another industry	8	21.1%
Leaving to undertake study	6	15.8%
Staff being poached by another outdoor recreation business	5	13.2%
Not being a good match for the role	3	7.9%
Having a poor work ethic	3	7.9%
Location	3	7.9%

Training and development

The majority of surveyed organisations provided training that is informal and on-the-job. Only two respondent organisations indicated they provided no form of funding for learning and development activities.

Table 15: Number and share of respondent organisations by level of financial assistance provided for learning and development activities. (n=182)[8]

Learning and Development Activity	Fully Paid		Part Paid		None	
	Total	%	Total	%	Total	%
On-the-job informal training	146	81.1%	26	14.4%	8	4.4%
Internal or external accredited formal training	72	42.6%	65	38.5%	32	18.9%
Professional development	112	62.6%	57	31.8%	10	5.6%
Internal or external professional registration	41	30.8%	28	21.1%	64	48.1%

As outlined in Table 16, the main training needs identified are in specialised outdoor activity skills, as has been determined previously, but there is also a need for other 'softer' skills such as group management or facilitation. This has also been confirmed anecdotally as a key need for staff.

Table 16: Share of respondent organisations by training needs. (n=180)

Training Need	Total	%
Specialised outdoor activity skills	120	66.70%
First Aid	87	48.30%
Group management skills	79	43.90%
Facilitation skills	77	42.80%
Behaviour management skills	66	36.70%
Management skills	61	33.90%
Marketing skills	60	33.30%
WH&S	55	30.60%
Food handling	47	26.10%

[8] Note that some respondents opted out of answering different parts of the question. Therefore these percentages are based on the total number of respondents for each individual form of training.

Administration	44	24.40%
Business skills	43	23.90%
Facilities operations	33	18.30%
Front-line service	29	16.10%
Digital literacy skills	27	15.00%
Basic literacy and numeracy skills	10	5.60%
No training is required	17	9.40%
Unsure	5	2.80%

Question for industry: Does the current training package meet these needs?

As shown in Table 17 respondents most commonly indicated that training had not been provided by their organisation because they could not afford to pay for it or because staff did not have the time.

Table 17: Share of respondent organisations by reasons for not providing required training to staff. (n=181)

Reason	Total	%
We currently do not have any need for training	68	37.6%
The organisation cannot afford to pay for it	49	27.1%
The staff do not have the time for training	40	22.1%
The staff cannot afford/ are unwilling to pay for it	31	17.1%
We are planning to organise it in the near future	30	16.6%
Haven't found an appropriate/satisfactory provider	27	14.9%
Cannot justify the time and cost involved	18	9.9%
We are not sure where to get the training from	17	9.4%
The quality of the training on offer is insufficient	16	8.8%
More training is not necessary but preferable	15	8.3%

Given that many organisations believed they could not afford to provide training to their staff, it is unsurprising that 84% of the 181 respondents indicated interest in government programs that subsidise training.

It is also noteworthy that based on NWDF data only 9 outdoor recreation organisations took up available funding, this may be due to the availability of funding being poorly promoted to the industry. The NWDF program ceased in 2014 and will be replaced by the Industry Skills Fund which is due to be rolled out in early 2015. The outdoor recreation industry will need to ensure it maximises the uptake of any future funding.

We would also expect that changes happening currently in the VET system will further impact the accessibility of training for the sector. It is also interesting to note that there were 140 reported cases (across 194 respondent organisations) where local staff undertook their training overseas. Anecdotally, industry have commented that they believe the prevalence of overseas training is increasing in response to the increasing cost of nationally accredited outdoor recreation training in Australia.

Question for industry: Are international courses of sufficient quality compared to Australian courses? Do international standards need to be implemented?

Key issues affecting volunteer staff

This section includes the key points that were highlighted through the research in relation to volunteer staff that are engaged in the outdoor sector. As with the paid staff data, organisations that engage both types of staff have been included in this analysis. There are three keys issues covered in this section: current volunteer demand in the industry, retention and training and development.

Current volunteer demand in industry

Out of 181 organisations, 54.1% of the respondents surveyed engage volunteers. It must also be noted here that not-for-profit organisations made up 61% of the sample and as a result this figure may be inflated.

Of those organisations that do employ volunteers, 106 organisations engage less than 150 volunteers and 11 organisations employ over 150 volunteers. The figures below show the regularity with which the volunteers are engaged by these organisations.

Figure 14: Average share of volunteers by type for organisations currently engaging less than 150 volunteers. (n=106)

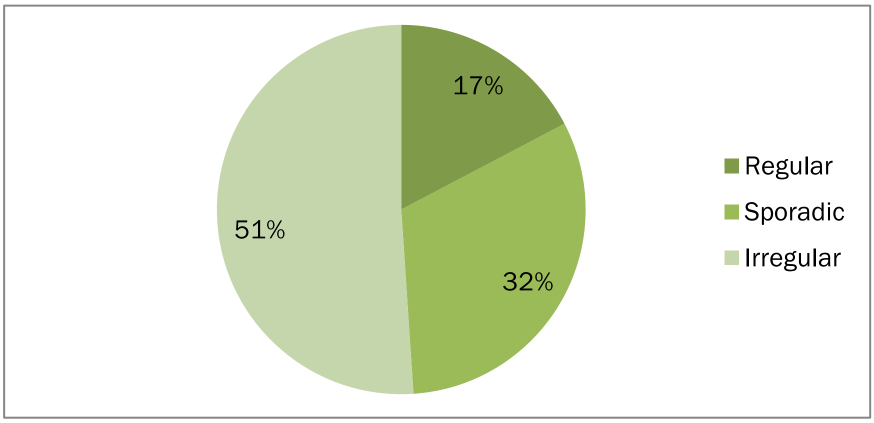
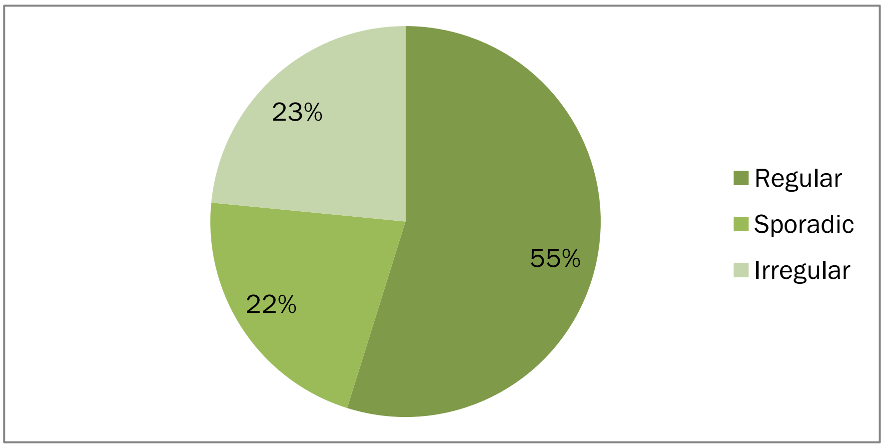


Figure 15: Average share of volunteers by type for organisations currently engaging more than 150 volunteers. (n=11)



The volunteer roles most in demand in the sector are activity guide/ leader/ instructor, closely followed by volunteer board/ committee members.

Table 17: Volunteer role by share of respondent organisations. (n=121)

Volunteer Role	Total	%
Activity guide/ leader/ instructor	75	62.0%
Board/ Committee member	68	56.2%
Administration	55	45.5%
Event management	51	42.1%
Food preparation/ Maintenance	41	33.9%
Finance	33	27.3%
Marketing	24	19.8%
Customer service	23	19.0%
Grant writing	21	17.4%

It is of note that, on average, an additional 313 volunteers is required per organisation. However, this figure is significantly skewed by larger not-for-profit organisations such as Scouts/Girl Guides who rely heavily on volunteer staff to run their programs. For smaller organisations, the average number of additional volunteers required is approximately 12. Consistent with the make-up of volunteer roles, activity leader/ instructor is the role with the greatest additional demand.

Table 18: Current volunteer vacancies for respondent organisations. (n=117)

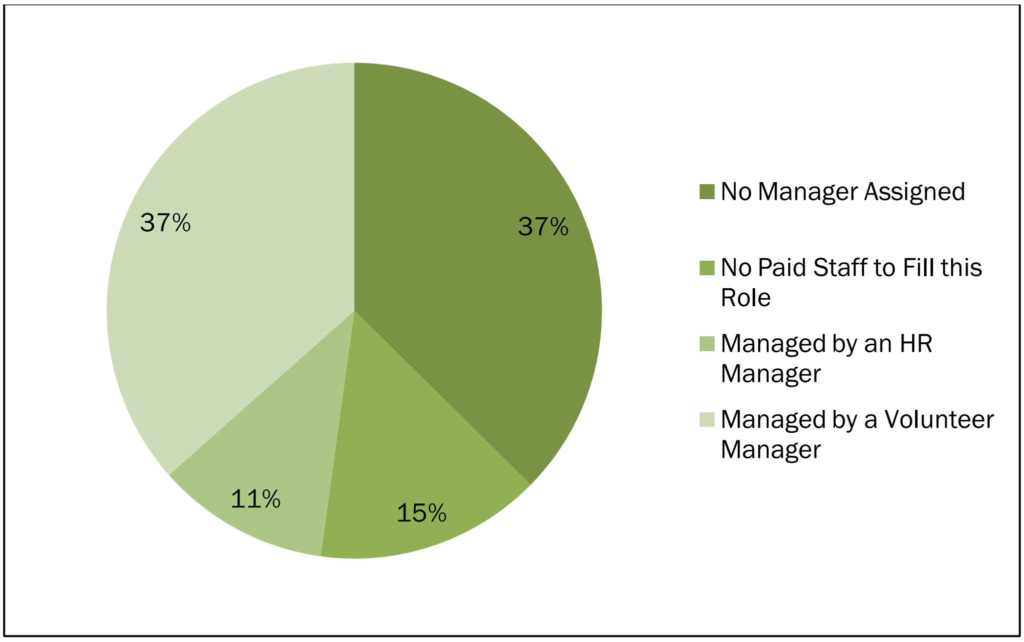
Organisations who require volunteers (n=117)	55%
Average number required over all respondents (n=60)	313
Average required for smaller volunteer organisations (n=49)	11.6
Average required for larger volunteer organisations (n=11)	1601

Table 19: Demand for additional volunteer roles by share of respondent organisations. (n=116)

Volunteer Roles	Total	%
No additional volunteers required	53	45.7%
Activity guide/ leader/ instructor	45	38.8%
Event management	29	25.0%
Administration	24	20.7%
Marketing	23	19.8%
Board/ Committee member	22	19.0%
Grant writing	21	18.1%
Food preparation/ Maintenance	20	17.2%
Customer service	10	8.6%
Finance	10	8.6%

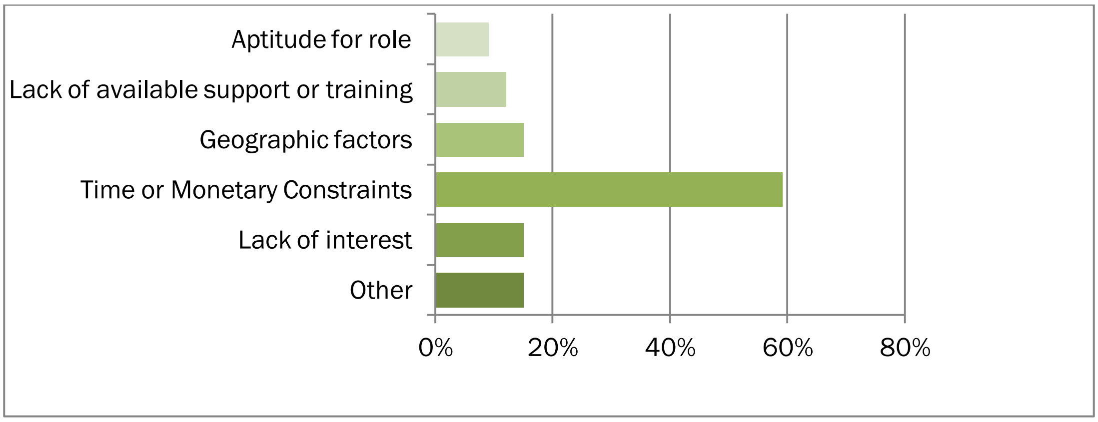
Just over half of the surveyed organisations indicated that they have no management structure for volunteers. Dedicated Volunteer Managers were present in 37% of respondent organisations, with the remainder being managed by a Human Resources department.

Figure 16: Volunteer Management in the Organisation. (n=115)



Out of the 117 organisations that employed volunteers, 26.5% of respondents said they had difficulty retaining volunteers. The primary reason cited for difficulty in retaining volunteers is the time or monetary constraints of volunteers to be able to continue their participation.

Figure 17: Reasons for difficulty retaining volunteers. (n=32) [9]



[9] Open response coded into appropriate categories

Training and development

As with the paid workforce, the most common form of training provided to volunteers was on-the-job and the areas where training is needed also matches those of the paid workers, as outlined below.

Table 20: Number and share of respondent organisations by level of financial assistance provided for learning and development activities for volunteers. (n=118) [10]

Learning and Development Activity	Fully Paid		Part Paid		None		N/A	
	Total	%	Total	%	Total	%	Total	%
On-the-job informal training	50	40.7%	24	19.5%	25	20.3%	24	19.5%
Internal or external accredited formal training	20	16.3%	20	16.3%	42	34.1%	41	33.3%
Professional development	28	22.8%	29	23.6%	36	29.3%	30	24.4%
Internal or external professional registration	10	8.4%	11	9.2%	41	34.5%	57	47.9%

[10] Please note that some respondents opted out of answering different parts of the question. Therefore these percentages are based on the total number of respondents for each individual form of training.

Table 21: Share of respondent organisations by volunteer training needs. (n=116)

Training Need	Total	%
Specialised outdoor activity skills	59	50.9%
Group management skills	44	37.9%
First Aid	42	36.2%
Facilitation skills	32	27.6%
Behaviour management skills	31	26.7%
Management skills	27	23.3%
Administration	27	23.3%
Marketing skills	24	20.7%
WH&S	24	20.7%
Food handling	22	19.0%
Facilities operations	19	16.4%
Business skills	16	13.8%
Front-line service	14	12.1%
Digital literacy skills	11	9.5%
Basic literacy and numeracy skills	3	2.6%
No training is required	24	20.7%
Unsure	5	4.3%

The key reasons why training and staff development was not offered to volunteer staff was the organisation did not identify a need for it, the organisation could not afford to or did not have time to invest in the training needs of its volunteers.

Table 22: Share of respondent organisations by reasons for not providing required training to volunteers. (n=125)

Reason	Total	%
We currently do not have any need for training	50	43.5%
The organisation cannot afford to pay for it	44	38.3%
The volunteers do not have the time for training	36	31.3%
The volunteers cannot afford/ are unwilling to pay for it	32	27.8%
We are planning to organise it in the near future	14	12.2%
Cannot justify the time and cost involved	14	12.2%
We are not sure where to get the training from	9	7.8%
Haven't found an appropriate/ satisfactory provider	9	7.8%
More training not necessary but preferable	4	3.5%

As the majority of respondents indicated that training was not required or provided to volunteers, this could be a barrier to retaining them in their roles longer.

Summary

As outlined at the beginning of this report due to the small number of responses to this survey, Service Skills Australia advises that caution be used when considering the findings presented in this document.

Service Skills Australia is interested in receiving further feedback from industry on the information presented in this report, particularly on the questions that were posed throughout and has set up a follow up online survey that can be accessed using this link: www.surveymonkey.com/s/8C86ZV8

The information from the follow up survey will be used to feed into the continuous improvement process for the outdoor recreation components of the training package and to inform our 2015 Environmental Scan. To download a copy of the 2014 Environmental Scan from the SSA website, please visit our website: www.serviceskills.com.au/our-environmental-scans.