

A person wearing a red life jacket, a white helmet, and a black wetsuit is rappelling down a waterfall. The water is turbulent and white with foam. The person is smiling and has their arms outstretched. A thick rope is attached to their harness and extends upwards. The background shows a rocky riverbed with some green moss.

Outdoor Recreation

OUTDOOR RECREATION IS CHARACTERISED BY PHYSICAL ACTIVITIES UNDERTAKEN IN OPEN, OUTDOOR SPACES FOR THE PURPOSE OF ENJOYMENT, RATHER THAN COMPETITION.

66% INCREASE

IN THE NUMBER OF EMPLOYED OUTDOOR ADVENTURE INSTRUCTORS BETWEEN 2006 AND 2011.

3% GROWTH

IN PARTICIPATION IN NATURE-BASED TOURISM BY INTERNATIONAL VISITORS

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Overview

Outdoor recreation is characterised by physical activities undertaken in open, outdoor spaces for the purpose of enjoyment, rather than competition, which would be classified as sport. The outdoor recreation sector is exceptionally diverse, with major intersections with the education, tourism, hospitality and community sectors. In the Australian and New Zealand Standard Industrial Classification (ANZSIC) system, what can be described as the 'outdoor' sector is predominantly found within school education and recreational activities, but is also captured in goods and equipment rental and hiring, transport-based sightseeing and accommodation.²⁴

The types of organisations or enterprises that are related to outdoor recreation activities include:

- outdoor activity providers
- outdoor activity tour providers
- recreational camps or centres
- adventure, eco or nature-based tourism operators
- outdoor artificial amusement venues (e.g., tree top adventure parks)
- outdoor education providers and programs
- schools with outdoor education teachers
- clubs, associations and peak bodies for outdoor recreation activities
- youth and community groups (e.g. Girl Guides, Scouts)
- recreation or adventure-based counselling and therapy providers.

Given the outdoor recreation is composed of a wide range of sub-sectors and job roles, there are substantial difficulties in collating statistics that capture the true size of the sector in terms of both output and employment. Since this is an ongoing struggle for the sector, the Outdoor Council of Australia partnered with Service Skill Australia to undertake regular projects to obtain better information.

The available ABS participation data for a select range of outdoor recreation activities indicate that some have seen substantial increases over the last six years, as shown in Table 4. While some categories merge both sporting and recreation forms (cycling, snow sports, horse riding, sailing), large increases have been seen in canoeing/kayaking, rock climbing/abseiling/caving and cycling/BMXing and steady large numbers in bushwalking.²⁵ Additionally, the census has indicated that there was a 66 per cent increase in the number of outdoor adventure instructors between 2006 and 2011.²⁶ Overall, this data supports industry feedback of increasing demand for outdoor recreation activities.

TABLE 4. PARTICIPATION IN SELECTED OUTDOOR RECREATION ACTIVITIES, 2011–12

	Estimated Participation ('000s)			Per cent change 05/06–11/12
	2005–06	2009–10	2011–12	
Cycling/BMXing	1,011.7	1,141.4	1,366.1	35.0
Bush walking	519.5	412.3	436.5	-16.0
Fishing	250.9	239	247.2	-1.5
Surf sports	N/A	226.6	226.1	N/A
Horse riding/Equestrian activities/ Polo	127.3	144.5	148.8	16.9
Canoeing/Kayaking	66.2	112.9	141	113.0
Ice/snow sports	155.2	119.7	138.7	-10.6
Waterskiing/Powerboating	100.6	107.4	88.9	-11.6
Sailing	94.3	72.6	68.4	-27.5
Scuba diving/Snorkelling	N/A	N/A	65.6	N/A
Trail bike riding	N/A	125.4	65.1	N/A
Rock climbing/Abseiling/Caving	35.3	58.1	57.5	62.9

Source: ABS, 2012, *Participation in Sport and Physical Recreation, Australia, 2011–12*, Cat. no. 4177.0.



Latest Intelligence

Legislation, Licensing and Activity Standards

Despite the inherent risks involved in outdoor activities and advocacy on behalf of the sector, there is currently little regulation of the outdoor activity industry. However, foundations for this have been progressively built over the last decade through the development of industry-based Adventure Activity Standards (AAS) and licensing requirements. Since the 2004 endorsement by the Federal Sport and Recreation Ministers' Council to institute state and territory AASs, these have since been developed and adopted in Victoria, South Australia, Tasmania, Western Australia, Queensland and New South Wales. These standards recognise the need for appropriate levels of skills and knowledge in the outdoor recreation sector to enable compliance with safety standards and to encourage the development of responsible environmental, cultural, and corporate management.

Licensing systems have also been in place for some time in Tasmania and New South Wales, yet these generally merely require operators to hold the correct level of insurance and to document their operational standards and procedures. In an effort to raise standards, the NSW Outdoor Recreation Industry Council (ORIC) has worked with National Parks and Wildlife to make a longer commercial license available to those operators who have achieved NARTA and T-Qual Accreditation. Furthermore, canyoning qualifications and the wilderness first aid skill set have become a regulatory requirement in the Blue Mountains. Guides will also be required to be reassessed to show current competency in their vertical and swift water rescue skills.

Even without a strong regulatory system, the industry clearly endorses the importance of qualified staff. Just under 90 per cent of respondents in the 2013 National Outdoor Sector Survey (NOSS13) indicated that they required their employed outdoor leaders to be qualified to deliver at least one activity, with just over 30 per cent requiring qualifications for at least five activities. While 40 per cent indicated that industry standards were the motivation, 31 per cent identified that 'quality assurance' motivated this need.

Adventure Tourism

Australia is seen as an international leader in eco and nature-based tourism—a sector that is experiencing global growth. A study by Tourism Research Australia has shown that 'experience seekers' make up 49 per cent of visitors to Australia.²⁷ Tourism Australia's market research has also found that 'nature' was the number one experience motivating consumers in key international source markets to visit Australia.²⁸ Together, these indicate that the provision of quality nature-based activities is a key drawcard for Australia's significant tourism industry. Over the seven years to 2009, there has been an average increase of three per cent per annum in the number of international visitors participating in nature tourism.²⁹ There are also significant numbers of domestic overnight and day visitors who take part in nature-based activities—over 12 million in each in 2009—yet there has been little growth over the seven years to 2009.

However, the future is likely to see further increases due to the concerted efforts by governments to invest in developing nature-based tourism. At a federal level, the Australian Government released a grant in 2012 to develop and implement Experience Development Strategies for four of Australia's 16 iconic 'National Landscapes', as well as product and industry development for an additional eight sites.³⁰ The aim of this project was to improve the selection of nature-based tourism experiences available to visitors, and to boost Australia's regional tourism areas. The Victorian Government has also highlighted investment in nature-based tourism products in the *Victoria's 2020 Tourism Strategy*, and has recently passed legislation to assist the development of tourism operations in Victorian national parks.³¹ Similarly, the Queensland Government identified the importance of nature-based or eco-tourism through the release of the *Queensland Ecotourism Plan 2013–2010*, which aimed to develop the industry such that it becomes Australia's 'top' nature-based destination.

Outdoor Education in Schools

Outdoor education involves providing students with practical and active learning experiences in natural environments and settings. These activities can be provided by staff employed by the school or can be outsourced to outdoor education providers. Those involved in leading these activities are trained either through the vocational qualifications in outdoor recreation, university-level qualifications in outdoor recreation or a teaching degree with some subjects in outdoor recreation. However, it has been reported that some may also only have in-house or induction training. Many school students also undertake the Duke of Edinburgh Award Scheme as an extra-curricular activity. A component of this award scheme is the completion of an 'adventurous activity', which requires the student to complete two 2–4 day journeys using outdoor recreation as a medium.

The industry reports that outdoor education is highly valuable in terms of its ability to develop technical skills to undertake different activities safely in the natural environment, an appreciation for the environment, as well as broader personal development in terms of leadership and interpersonal skills. This was recognised in the first national curriculum, when it stated that outdoor recreation is, 'an important part of learning in the Health and Physical Education curriculum as they promote lifelong physical activity. They also contribute to health and wellbeing through direct personal experiences and connections with natural environments. Outdoor activities provide a valid environment for developing movement competence, promoting a sense of wellbeing and enhancing interpersonal skills.'

As the school education system currently stands, the provision of outdoor education in schools is highly dependent on the resources of the school, as well as the Principal's—or other decision maker's—appreciation of the benefits of outdoor education. This makes the inclusion of outdoor education in schools highly disparate. However, the sector is also reporting that outdoor education has been a growing field.

An opportunity for implementing a more standard approach to the provision of outdoor education was the development of the first national curriculum. The national Health and Physical Education curriculum was completed in July 2013 and will be implemented from February 2014. The outdoor sector provided strong input and the result was that outdoor recreation and education were identified throughout the curriculum in the following ways:

- 'All students at appropriate levels across the continuum of learning from Year 5 to Year 10 will participate in...recreational activities in natural/outdoor settings' (of which access to facilities, equipment and teacher expertise will dictate the type of activity).
- Students will also explore, at appropriate intervals during Foundation to year 10, safe practices when in the outdoors under the 'safety' area of learning.

- Outdoor recreation was listed in the curriculum content descriptions and elaborations for health and physical education across the entire schooling period (foundation years and years 1–2, 3–4, 5–6, 7–8 and 9–10).
- Outdoor education was listed as a specialist subject that could meet the content areas and performance standards for outdoor recreation, and learning the importance of ‘connection to place and communities’ for health and wellbeing. It could also draw on curriculum content from Geography and Science.
- Developing an understanding of the importance of recreation, as well as learning in and about the outdoors, was also included as a necessary principle that needs to be understood by students for the cross-curriculum priority of ‘sustainability’
- Navigation of the outdoors was listed as an activity that can develop or apply the general capability of ‘numeracy skills’.³²

These inclusions will mean that all school students will have a potentially greater level of engagement with outdoor recreation and outdoor education, with the implication that the number of trained staff to deliver this to students will need to increase nationally.

Changes to the VET Market

The funding arrangements for qualifications under VET reform are progressively being released in each state and territory. Table 5 indicates the funding announcements that have been made to date for the outdoor recreation qualifications. As indicated, there is an absence of any funding for training in outdoor recreation in the Northern Territory, Western Australia and the Australian Capital Territory. Since outdoor recreation qualifications are not on the Western Australian provisional priority industry qualifications list, places will be subject to capping and higher student fees, unless undertaken as an apprenticeship or traineeship.

TABLE 5. FUNDING OF OUTDOOR RECREATION QUALIFICATIONS UNDER VET REFORM PROGRAMS^j

Qualification	Jurisdiction						
	VIC	SA ^k	NT	ACT	QLD	WA	NSW
Certificate II in Outdoor Recreation	\$8.00 per hour	✓ TGSS, FF					✓
Certificate III in Outdoor Recreation	\$1.50 per hour	✓ TGSS			✓		✓
Certificate IV in Outdoor Recreation	\$1.50 per hour	✓					✓
Diploma of Outdoor Recreation	\$1.00 per hour	✓					

j Correct as at 16 December 2013

k TGSS refers to the Training Guarantee for SACE Students. This means that qualifications listed as TGSS on the Skills for All Funded Training List will be fully-funded for South Australian students who are 16 years or over and who are enrolled and working towards completing the South Australian Certificate of Education (or equivalent). Full eligibility criteria are available at the following website: skills.sa.gov.au/for-training-providers/training-school-students/training-guarantee-for-sace-students. FF denotes ‘fee free’.

Given that the cost of delivering outdoor recreation qualifications is relatively high due to the large number of units of competency, high staff-to-student ratios and a significant amount of required field experience, changes to funding in vocational education are severely affecting this sector's provision of training. This is particularly concerning in an industry characterised by high levels of risk. Training in this industry is also highly 'geographically specific' as some types of outdoor activities require certain physical environments, such as snow fields or waterways. As such, it is crucial that there are adequate numbers of providers in total, but also that there is also an adequate number of providers across the diverse types of landscapes to provide training across all types of activities.

Due to an increasingly constrained funding environment and greater competition due to contestability of funds, some providers have begun to rationalise the provision of outdoor recreation training. In New South Wales, the incoming Smart and Skilled reforms have led to decisions to cut funding and staff number around the delivery of outdoor recreation, with certain skill areas only being provided at commercial rates. Further afield, the Tropical North Queensland Institute of TAFE has also recently discontinued its provision of the Certificate IV in Outdoor Recreation. The funding cuts in Victoria led to some registered training providers, such as Swinburne, to withdraw from providing outdoor recreation courses entirely. However, in response, industry came together to set up their own institute, the Murrindindi Training Institute, and continued lobbying of the government saw higher levels of funding restored in the next budget, enabling providers of outdoor recreation training in Victoria to remain viable.



Workforce Development Needs

Managing Seasonality

Seasonality is a pervasive issue for a sector ruled by the climate, with major implications for its workforce. Rather obviously, the season governs when certain outdoor activities can occur. For example, alpine-based activities clearly only occur during snowfall in winter. In the outdoor education sector, this is evident with most demand occurring in school terms one and four.

While those working in outdoor education benefit from the degree of predictability from bookings made well in advance by schools, those working the outdoor adventure sector report that bookings emerge up until the last minute. Even within the confines of demand within certain seasons, the changes in the weather on a daily basis means that demand can spike unexpectedly. Weekends will also tend to have greater demand than during the week. The overall result is that obtaining continuous work is difficult in this sector.

This seasonality is managed by the industry in a variety of ways. In its most simplistic, businesses will opt for a core number of staff, with a periphery of casual workers or contractors to meet any shortfalls. However, industry reports that businesses will still often be unable to meet all demand at short notice and will often have to turn customers away. For the individual who takes on the intermittent work, they will work for a range of businesses to make up full-time work. Across the seasons, they can opt to work in activities that are based on a different climate, and may require as many as six activity skill areas to gain employment across the year, or they can choose to travel to countries in the northern hemisphere. More advanced ways of managing the workforce involve regional arrangements, such as that currently being trialled in the Snowy Mountains and South Coast of New South Wales, whereby workers will have a pre-existing arrangement to shift between two employers in the different regions according to the season. Finally, the sector also reports, that it can be an

attractive work option for those who do not wish to work full-time, or those supplementing other jobs.

While the flexible nature of casual and freelance-style work can be attractive to some, the sector notes that it is an impediment to workforce development in many other ways. The most notable is the difficulty in being able to offer standard workplace-based models of training in terms of taking on full-time trainees. With a full-time trainee required to work a minimum number of hours per week, this can be virtually impossible to guarantee given the seasonal and unpredictable nature of customer demand. There is the potential for alternative models that are more suitable for the nature of the industry to be trialled. Industry reports that the casualised nature of the industry does also deter some people from entering the industry, or encourages some to exit the industry when they reach a certain life-stage.

Requirements for Journey-Based Work

Another key factor for the workforce in the outdoor sector is the working conditions associated with field work. Taking a group of clients into uncontrolled-environments for long stretches of time is physically and intellectually intensive and also requires staff to be away from home and their families. Journey-based work also requires staff to hold the higher level qualification—the *Certificate IV in Outdoor Recreation*, which reflects the higher skills required to manage more complex environments and to work independently. However, this qualification is said to be in shorter supply than the *Certificate III in Outdoor Recreation*. Supervising trainees for journey-based work is also particularly difficult due to the independent nature of the work, the need for the supervisor to also be responsible for the clients and finally, the inherently risky environment makes it challenging to gradually adjust the difficulty of tasks depending on the experience of the trainee.

Retention and Career Pathways

The sector reports that a workforce development issue is the relatively flat organisational structures that can encourage turnover. This is due to the small number of higher-level management roles required compared to the field work roles, which limits progression opportunities. This is also amplified by working conditions for field work roles that are not easily suited to all individuals, as mentioned previously.

However, the sector's breadth across areas like tourism, education and community services provides a variety of work settings and an ability to broaden skills, and the skills involved are highly transferable to a range of other industries. For example, many staff in the outdoor recreation sector reportedly transition into areas such as emergency or ambulance services, education and tourism, and are valued for their proven leadership capabilities and high levels of initiative.

Volunteers

While paid staff are a significant component of the workforce, particularly in the adventure tourism and outdoor education sectors, there is considerable use of volunteers in the youth and community sectors. The NOSS13 found that 36 per cent of organisations reported having volunteers, with the most common roles being activity guide or instructor followed by board or committee member. These organisations, which tend to be 'not-for-profit', such as Girl Guides or Scouts and local activity clubs, can be almost entirely run by volunteers. The sector reports that finding volunteers is not particularly problematic, with younger generations showing significant interest. However, there are challenges in terms of managing the need for a certain level of skills in a high-risk environment, which often has implications for insurance. This is particularly problematic given the limited resources of the sector and the lack of time on the part of volunteers to undertake training. One community organisation's analysis of its volunteer workforce indicated that

greater segmentation of roles, which reduces the skill needs of that role, is the necessary strategy to manage the mismatch in the skill 'supply' of available volunteers. Volunteering is reportedly also a pathway into paid work in the sector, thus playing a potentially important workforce development role for the sector.

The NOSS13 revealed much about the sector's volunteer needs, with 55 per cent indicating a need for a greater number of volunteers—on average, an additional 313 were required per organisation. However, industry validation of the results indicated this would not capture the board and committee volunteer roles that have significant upskilling needs rather than any need to increase their numbers. In addition, the survey reported that the greatest areas of volunteer training need are specialised activity skills, followed by group management, first aid and facilitation. Interestingly, this closely resembled the priority training needs for paid outdoor sector staff.

Data for Workforce Planning

As noted in the overview of this section, there is great difficulty obtaining statistics that quantify the breadth of the outdoor sector. While the occupation of 'outdoor adventure guide', which encompasses outdoor adventure instructors, outdoor adventure leaders and outdoor education teachers, is specific to the sector, a large number of occupations that the sector employs are generalist occupations, such as managers, program managers, administrators, chefs and general maintenance workers.

Without a defined industry for working in the outdoors within the ANZSIC system, those working in generalist occupations in the outdoor sector are untraceable. As an indicator, this is demonstrated below with the occupation 'Outdoor Adventure Guide', which when cross-referenced with industry of employment, is found across 31 sub-industries see Table 6. This subsequently poses great difficulty in understanding and forecasting the workforce needs of the sector.

This is further complicated by the potential under-identification of those working in the sector in the specific occupation of outdoor adventure guide. The recent census estimated that there were 1,859 outdoor adventure guides, which industry believes is a significant underestimation. The NOSS13 somewhat substantiates these claims with 1,237 outdoor adventure guides recorded by only a portion of the industry's organisations (143 organisations).

TABLE 6. NUMBER OF EMPLOYED OUTDOOR ADVENTURE GUIDES BY SUB-INDUSTRY

ANZSIC Sub-industry (3 digit level)	Number of Outdoor Adventure Guides Employed in Sub-industry
School Education	441
Amusement and Other Recreation Activities	381
Adult, Community and Other Education	379
Travel Agency and Tour Arrangement Services	84
Scenic and Sightseeing Transport	78
Sports and Physical Recreation Activities	78
State Government Administration	56
Accommodation	54
Education and Training, nfd	52
Tertiary Education	43
Religious Services	34
Inadequately described	33
Parks and Gardens Operations	23
Sports and Recreation Activities, nfd	15
Fishing, Hunting and Trapping, nfd	13
Recreational Goods Retailing	11
Civic, Professional and Other Interest Group Services	11
Preschool and School Education, nfd	10
Residential Care Services	8
Other Social Assistance Services	7
Motor Vehicle and Transport Equipment Rental and Hiring	6
Other Personal Services	6
Health Care and Social Assistance, nfd	5
Other Administrative Services	5
Hunting and Trapping	5
Regulatory Services	4
Aquaculture	4
Social Assistance Services, nfd	4
Adult, Community and Other Education, nfd	3
Not stated	3
Child Care Services	3
Total	1,859

Source: ABS, 2013, *Census TableBuilder (Census of Population and Housing 2011)*

Current Impact of the SIS10 Sport, Fitness and Recreation Training Package (Outdoor Recreation)

Enrolments¹

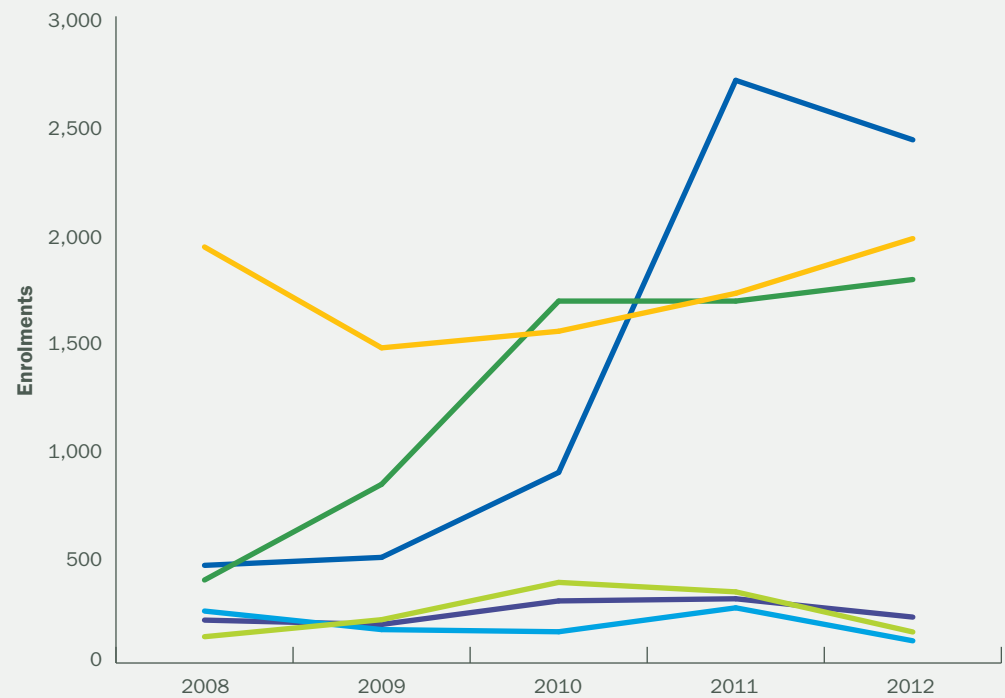
Figure 13 indicates that there has been a substantial increase in the number of publicly funded enrolments in the *Certificate IV in Outdoor Recreation* in 2011 and 2012, as well as representing the highest number of enrolments overall. This qualification is significant as it equips individuals with the skills to lead journey-based outdoor activities. Subsequently, for organisations and enterprises that only provide journey-based activities, this is considered the entry qualification. The *Certificate III in Outdoor Recreation* has also seen a shift upwards in enrolments in the last two years. This qualification equips people to conduct activities that might be onsite in a highly supported environment or offsite, generally with a higher qualified staff person directly supervising the Certificate III-qualified person.

The industry also heavily uses the many skill sets available for outdoor recreation, such as activity skill sets for bushwalking or abseiling, but also wilderness first aid. Industry typically requires workers to be competent in at least three skill areas, but often up to six. Hence, these skill sets represent a pathway to broaden the skill areas held by an individual and to broaden their employability, particularly across seasons. Recognising the importance of these skill sets, the Queensland Strategic Investment Fund provided subsidised training in skill sets in abseiling, climbing, surfing, mountain biking, bushwalking and high ropes for existing workers in the industry.

Representatives from training providers in outdoor recreation have reported a shift in the last five years of an increasing number of mature-age candidates enrolling in these courses. Many of these students have come from unrelated fields but are seeking to pursue their passion for the outdoors as their career.

¹ Note on enrolment and completion data: NCVER's VET provider collection provides information on publicly funded training programs delivered by government funded and privately operated training providers and therefore excludes any training activity not in the receipt of government funds. However, this excluded data will be available in coming years as mandatory 'total VET activity' reporting requirements came into effect in January 2014.

FIGURE 13. OUTDOOR RECREATION QUALIFICATION ENROLMENTS, 2008–2012



Qualification	2008	2009	2010	2011	2012
Certificate II in Outdoor Recreation	1,930	1,462	1,539	1,715	1,969
Certificate II in Outdoor Recreation (Multiple Activities)*	122	201	374	330	144
Certificate III in Outdoor Recreation	385	829	1,679	1,679	1,779
Certificate III in Outdoor Recreation (Multiple Activities)*	241	155	145	256	103
Certificate IV in Outdoor Recreation	453	490	884	2,703	2,427
Diploma of Outdoor Recreation	199	179	288	298	213

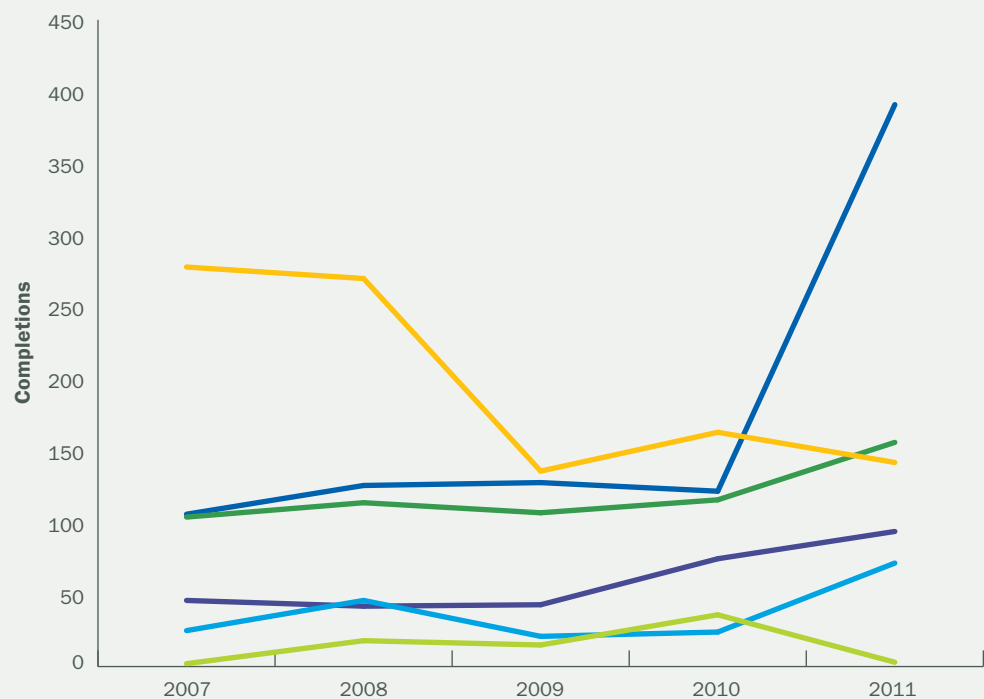
Source: NCVET VOCSTATS (<http://www.ncver.edu.au/resources/vocstats/intro.html>), extracted on 05/09/2013

* Denotes qualifications deleted from the Sport, Fitness and Recreation Training Package

Completions

Mirroring the trends seen in enrolments, Figure 14 indicates that there has been a significant increase in the supply of *Certificate IV in Outdoor Recreation* graduates in 2011. Graduates at the Certificate IV level have also made up the bulk of recent graduates, overtaking the Certificate III. While not as prominent, there have also been continual increases in graduates from both the *Certificate III in Outdoor Recreation* and the *Diploma of Outdoor Recreation*. The completion figures are significantly lower compared to enrolment figures, which is attributable to the high numbers of enrolments in skill sets or standalone units of competency that are not recorded as a completion of the full qualification, despite being recorded as an enrolment.

FIGURE 14. **OUTDOOR RECREATION QUALIFICATION COMPLETIONS, 2007–2011**



Qualification	2007	2008	2009	2010	2011
Certificate II in Outdoor Recreation	278	270	136	163	142
Certificate II in Outdoor Recreation (Multiple Activities)*	2	18	15	36	3
Certificate III in Outdoor Recreation	104	114	107	116	156
Certificate III in Outdoor Recreation (Multiple Activities)*	25	46	21	24	72
Certificate IV in Outdoor Recreation	106	126	128	122	391
Diploma of Outdoor Recreation	46	42	43	75	94

Source: NCVER VOCSTATS (<http://www.ncver.edu.au/resources/vocstats/intro.html>), extracted on 05/09/2013

* Denotes qualifications deleted from the Sport, Fitness and Recreation Training Package

Outdoor Recreation Occupations in Demand

ANZSCO Code	Occupations	Training Package Qualification	Justification/evidence
4522	Outdoor Adventure Guide	Site-based guides under supervision: <i>SIS30413 Certificate III in Outdoor Recreation</i> Journey-based, independent guides: <i>SIS40313 Certificate IV in Outdoor Recreation</i>	<p>The sector reports increasing difficulty recruiting qualified outdoor adventure guides, particularly following a continuing reduction in the provision of these courses nationally.</p> <p>Industry reports use of 457 visas and the need to restrict its provision of services at times due to a lack of staff to meet customer demand. Journey-based, independent guides are cited as being in greater shortage than those needing to operate at the Certificate III level.</p> <p>The Department of Employment estimates a decrease of 100 staff between November 2012 and 2017. However, it should be noted that the employment figures for an occupation of this small size can be highly volatile.</p>



