

Keynote Presentation:

Outdoors WA Conference

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“Challenges and Opportunities in the Outdoor Adventure Industry”



Transforming the Outdoor Adventure Industry for 21st Century Success & Sustainability

If you were given the task of envisioning and constructing a vision for the Australian outdoor adventure industry in 10 years:

- Does the industry need to change?
- What would you want to transform the industry into?
- What would be the core components of such a vision?
- What would be the core elements of the strategy to realise such an outcome on the ground over (say) 10 years?
- What would be the respective roles and responsibilities of each of the key stakeholders in creating such an outcome?
- What new things do you want to do, and what old things do you want to cease to do?



Even though we often have great difficulty in defining what the outdoor adventure industry is and what its operating environment looks like today, what do we want it to become, how do we get there and how do we know when (or if) we arrive?

What are some of the issues that we must confront?



To get to the future first one must make three journeys involving:

- Hindsight
- Insight
- Foresight



Presentation Overview

- History
- Driving forces
- Learnings
- Achievements
- Are we there yet?
- Options for the future and how we get there
- Issues to address in moving forward



What is the Outdoor Adventure Industry?



Defining the Outdoor Adventure Industry Today

In trying to define who we are today, there are two major issues:

- the diversity of the outdoor industry; and
- the complexity of the environment in which we operate



Diversity of the Outdoor Adventure Industry

- What we do (ie. the types of activities)
- Where we do them
- What equipment we use
- Why we do them
- Who does them (& who else is present)



The Outdoor Adventure Industry

Retailers

Planners

Land managers



Policy developers



"Hindsight"



NORLD Symposium Outcomes (1992)

- Provide a forum for communication/co-operation between all involved in outdoor recreation/outdoor education
- Establish agreement on common practices and core competencies in outdoor recreation/outdoor education
- Provide the basis for relating outdoor recreation/outdoor education policies to national land management and other strategies

- *Are we there yet?*



National Products 1992-2007

- National Outdoor Recreation Activity Standards (1997) “**NORLD competencies**”
- National curriculum (eg Certificate IV in Outdoor Leadership) 1997, 1998
- Introduction of **Traineeships & Apprenticeships** in Outdoor Recreation
- National Outdoor Recreation Industry **Training Package** 1999
- National Outdoor Recreation Industry **Training Package** 2003
- National Outdoor Recreation Industry **Training Package** ? 2008
- National Outdoor Leader Registration Scheme (**NOLRS**) 2003
- Adventure Activity Standards (**AAS**) in Vic (2003), SA (2006), Tas. & WA (2007), NSW & Qld (2008)
- **Accreditation** (ACA, ORIC, NARTA, AHIC, TAA, Eco Tour Guide)



Structural Changes 1992-2007

- Aust Outdoor Education Council (AOEC) (from various state outdoor education associations)
- Outdoor Recreation Council of Aust. (ORCA) 1996
- Outdoor Council of Aust. (OCA) 2003
- State camping associations, then Aust. Camping Assoc. Inc then Aust Camps Assoc. Pty Ltd
- Establishment of a number of state associations, such as QORF, NTORC, TasORC, ORC, RecSA
- Restructuring of what is now Outdoors WA and ORIC.
- Establishment of Industry Training Advisory Bodies at state and national levels (eg. Future Now; SRTA now Service Skills), and other associated bodies such as the Recreation Industry Training Company (RITC)



Conferences 1992-2007

- **NORLD**
 - Port Sorrell, Tas 1992; SA, 1993)
- **National Outdoor Education Conferences**
(1993, 1995, 1997, 1999, 2001, 2003, 2007)
- **Outdoor Recreation Council of Australia (ORCA)**
 - Managing Risk in Outdoor Organisations (1996)
 - Leading Outdoor Organisations (1998)
- **Outdoor Council of Australia (OCA) National Outdoor Conference**
 - ‘the challenges we face’ (2005)
- **Australian Camping Assoc International Camping Congress**
- **Australian Camps Association National Conference 2006, 2007**
- Various state conferences



State-Specific Achievements

What are WA's?



Achievements 1992-2007

- Greater **discussion** on common issues and sharing of resources between states
- Greater agreement on outdoor leadership **competencies and common practices**
- Greater **interaction** between land managers and the outdoor adventure industry
- Greater awareness by outdoor leaders of what constitutes a 'safe, quality' program
- Greater **awareness by other stakeholders** (eg. clients, insurers, land managers) of what would be considered 'best practice'
- Increased **professionalism**

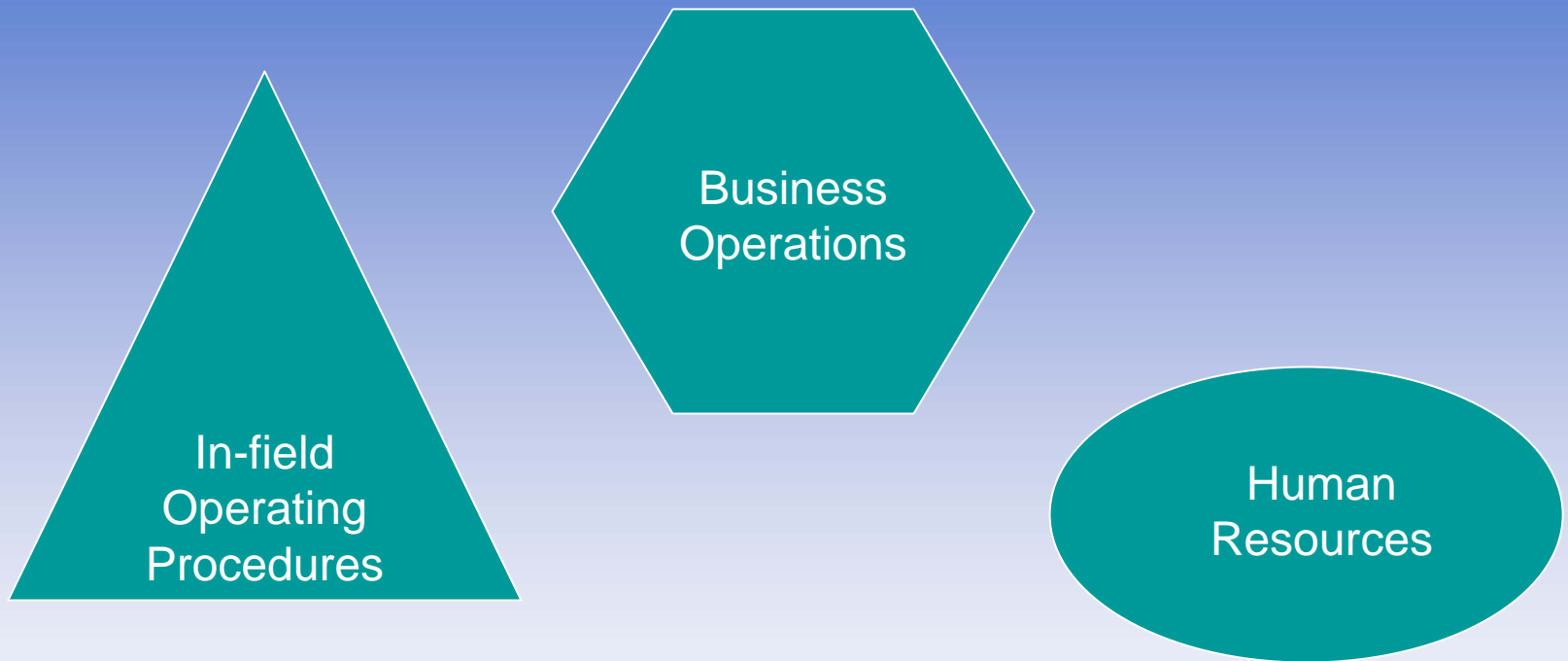


Achievements 1992-2007 (cont'd)

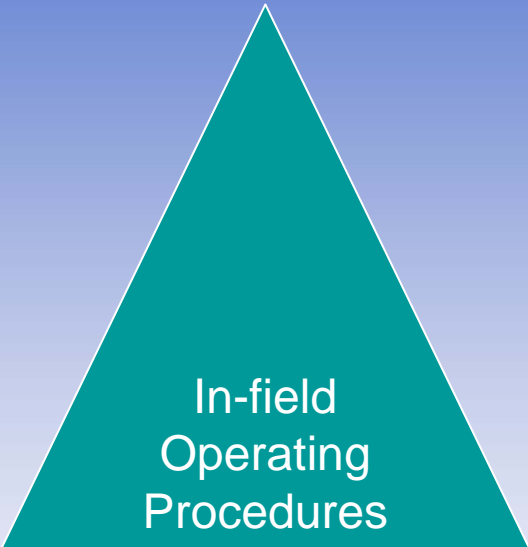
- Have we achieved greater quality (ie. better outdoor leaders and programs), or have we just better defined what the components of 'quality' are?
or
- Are all the individual pieces of the jigsaw puzzle still waiting in the box to be joined into a picture of a quality industry?



What are we Trying to Quality Assure?



What is the Process and 'Benchmark'?



In-field
Operating
Procedures

- Legislation
- Australian Standards (Compliance and Advisory)
- Codes of Conduct/Practice
- Licensing and Permit requirements
- Guidelines
 - Education Department
 - Adventure Activity Standards (Vic, SA, Tas)
 - * Planning
 - * Responsibilities of Trip Leader
 - * Equipment
 - * Environment and conduct

<http://www.orc.org.au/aas/index.htm>

<http://www.recreationsa.org/default.php?bgc=304798&pid=aas/home>

<http://www.development.tas.gov.au/sportrec/projects/advenactstandards.html>



What is the Process and 'Benchmark'?

Accreditation
& Registration
Schemes



Human
Resources

- Code of Conduct/Code of Practice
 - Experience & ongoing professional development
- +
- Competencies (from National Training Packages) or outcomes equivalent to competencies
 - tour guide (generic)
 - * GOA National Tour Guide (<http://www.goa.org.au>)
 - ecotour guide (generic)
 - * Eco Guide Australia Certified Guide (<http://www.ecotourism.org.au/ecoguide.asp>)
 - on road cycle tour guide/MTB tour guide
 - * National Outdoor Leader Registration Scheme (NOLRS) (<http://www.outdoorcouncil.asn.au/nolrs/index.htm>)
 - cycle coach/official
 - * National Coaching/Officiating Accreditation Scheme (<http://www.cycling.org.au>)



National Outdoor Leader Registration Scheme (NOLRS)

Registration is available within the NOLRS for the following activities:

- Abseiling (Artificial Surfaces)
- Abseiling (Natural Surfaces)
- Bushwalking
- Challenge Ropes Course (High Ropes)
- Challenge Ropes Course (Low Ropes)
- Climbing (Artificial Surfaces)
- Climbing (Natural Surfaces)
- On Road Cycle Touring
- Mountain Biking



What is the Process and 'Benchmark'?



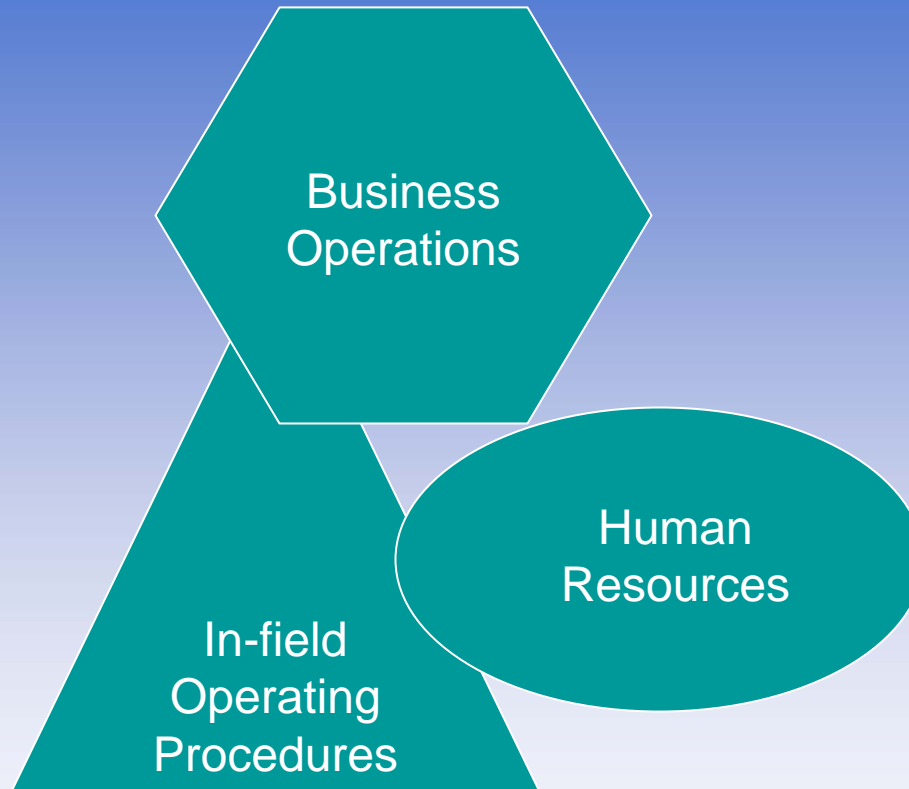
Business
Operations

- Accreditation assesses workplace practices, systems and procedures across all tourism and associated businesses
- Accreditation is concerned with all the 'back of house' elements of your business. Therefore, Accreditation requires businesses to have relevant licences and insurances in place and have documented business planning, policies and procedures
- Generic requirements common to all TAAL endorsed programs. Sector specific programs are available eg.
 - Accommodation
 - Camping and Recreation
 - Education and Training Services
 - Events and Conferences
 - Guiding Services
 - Nature based Tourism
 - Retail

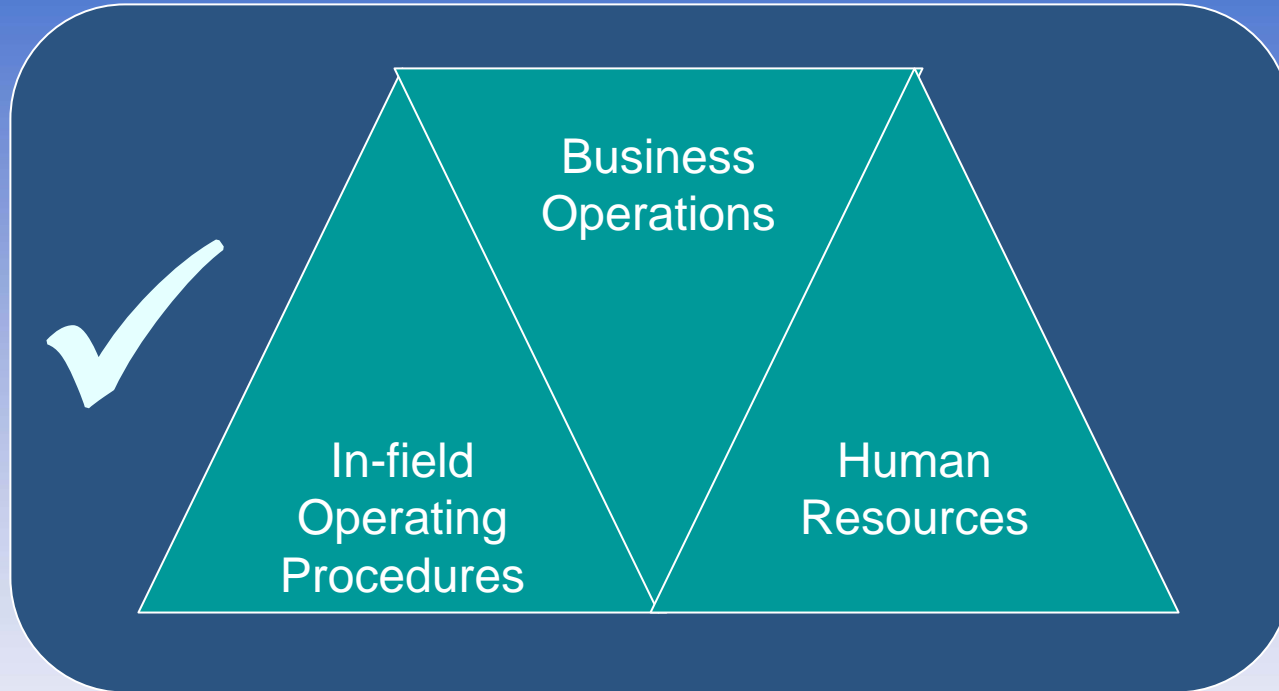
(http://www.qualitytourism.com.au/default.aspx?page_id=139)



Our Current Quality Tool Kit



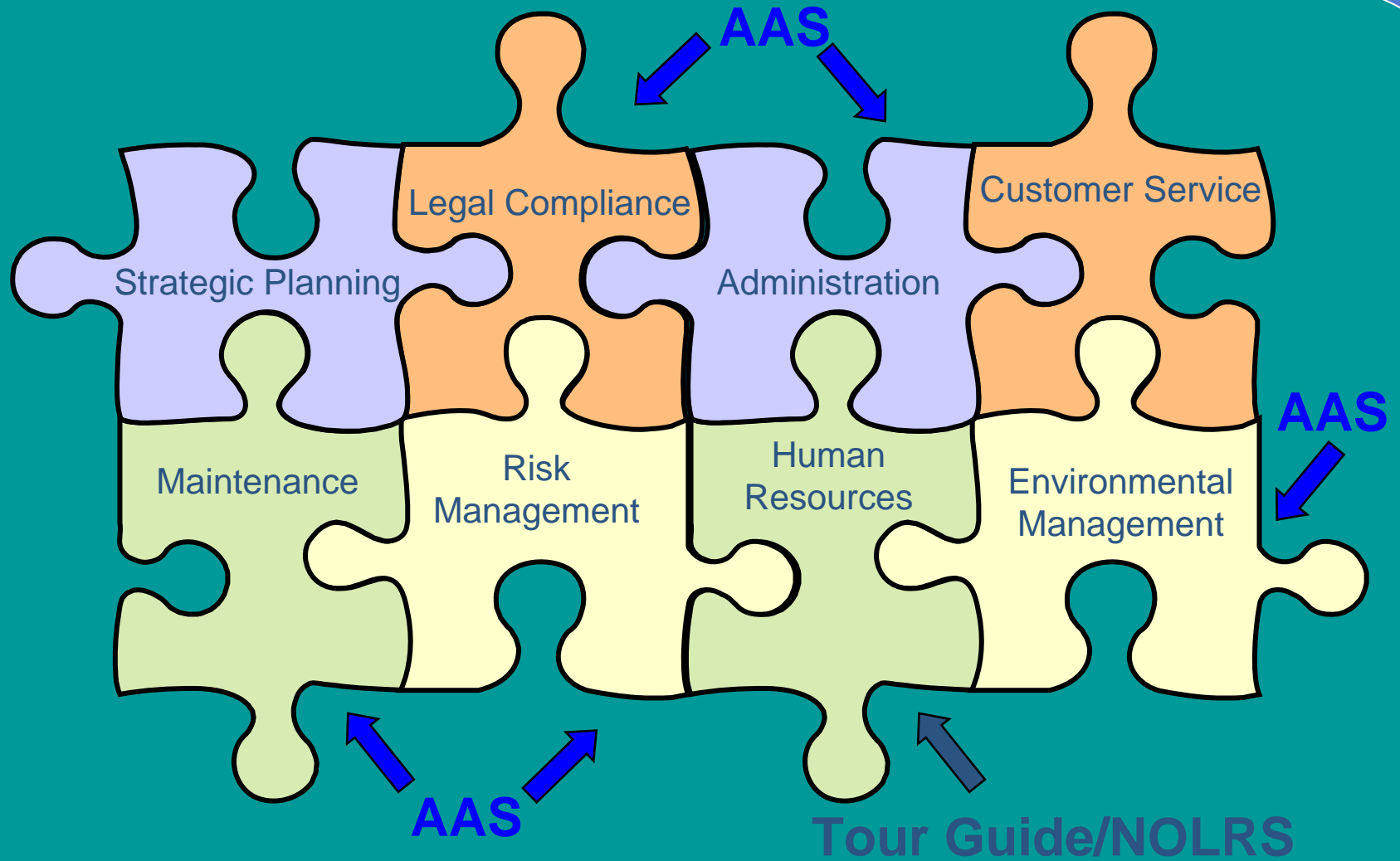
Our Preferred Quality Tool Kit



**Accreditation of all aspects of operation
based on clearly defined benchmarks**



Our Preferred Quality Tool Kit



Some Disappointments.....

- Loss of access to some areas for recreation due to Forest Agreements process
- Loss of tertiary level courses which enable the development of outdoor leaders through an education pathway other than the VET system
- Ongoing inability of various government agencies to collaborate effectively to resolve outdoor recreation issues
- Still greater and unexplored opportunities for communication/co-operation
- Need to consolidate and 'sell' and implement nationally what we have achieved with respect to agreement on common practices and core competencies. That is, it is still implemented 'ad hoc'; state by state
- Need to raise the 'national' profile to augment successes at the state/territory level



Learnings from the Journey

- Disparate, dispersed, diverse and 'disorganised' industry
- Highlighted similarities and differences
- Accurate and effective communication is essential
- "Why wasn't I told?"
- Conflicts of interest, commercial or otherwise
- Lengthy process
- The illusive "they"
- Commercial versus altruistic reasons
- There will always be the 'knockers'
- Many dedicated, hard working individuals willing to give of their time and energy
- The goalposts always change!



What were the driving forces for these initiatives of the past 15 years?

Have they changed?

Do they need to change?



“Insight”

into the Australian and WA Outdoor Industry



Industry Trends

Social

- Rising participation in individualised, unstructured/informal recreation and outdoor recreation as opposed to participation in organised sport;
- Increased demand for activities which are convenient, close to home, and which provide high levels of satisfaction due to time constraints ie. less travel time;
- Rising activity sophistication with higher expectations of service;
- Increasing demand for activities offering perceived risk, excitement, and vertigo;
- Increasing need to respond appropriately to the ageing of the population;
- Decreasing willingness to volunteer;
- Decreasing activity levels (in some activities) and increasing population obesity;
- Increasing numbers and frequency of short-term recreation fads vs long term recreation trends; and
- Increasing impact of technology-based recreation eg. new products and Internet access



Trends (cont'd)

Economic

- Changes in work patterns with higher proportions of part-time, casual employment and unemployment;
- Increasing demand for risk management, protection from liability and litigation; and
- Increasing separation between rich and poor and thus low cost vs expensive recreation activities.

Cultural

- Increasing influence of multi-culturalism and cultural links on recreation pursuits.

Environmental

- Increasing interest in the environment and outdoor recreation and subsequent need for sustainability of recreation opportunities; and
- Climate change and the impact of drought and weather extremes.

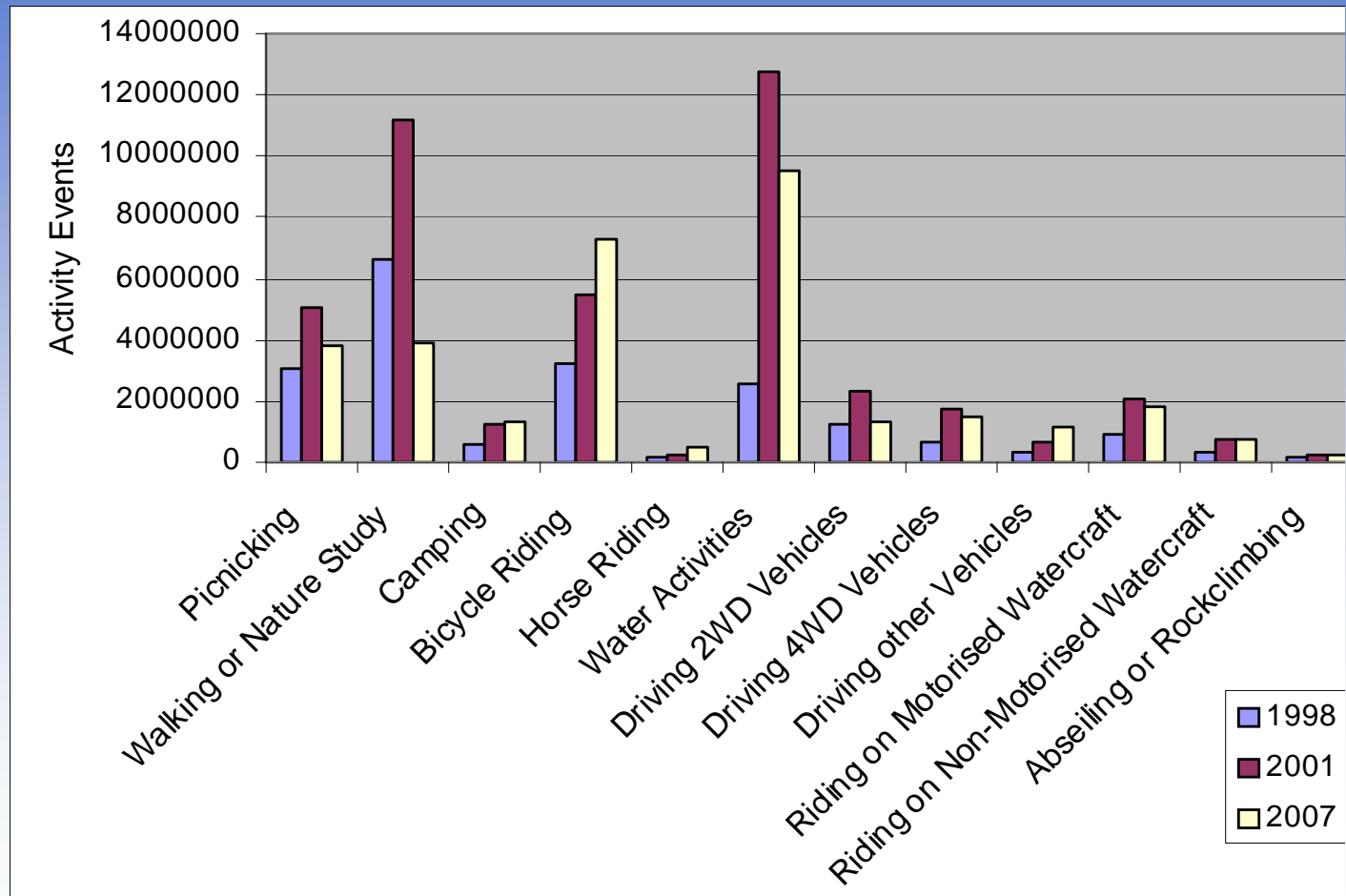
Political

- Rationalisation of local and State Government services leading to a withdrawal of services and increasing opportunity for private service provision.



2007 SEQ Outdoor Recreation Participation

Activity events of outdoor recreation activities



Participation Statistics

Australian sport and physical activities
(ranked on ABS2001 national participation rates*)

Participation rates* (%)

Australia Queensland

Walking for exercise	25.3	23.9
Aerobics / fitness	10.9	8.9
Swimming	10.9	9.9
Golf	7.5	7.3
Tennis	6.8	5.1
Cycling including BMX and mountain bikes	5.7	4.3
Football (joint data for AFL, ARL, RU, Touch)	5.1	4.5
Running	4.6	3.5
Fishing	3.5	4.9
Bushwalking	3.2	3.2
Netball	3.1	3.3
Soccer (outdoor)	2.6	1.8
Cricket (outdoor)	2.5	2.3
Basketball	2.4	1.6
Yoga	2.1	2.2
Surfsports	2.0	2.2
Lawn bowls	1.9	2.7
Dancing	1.8	1.7
Squash	1.7	no data
Volleyball	1.1	1.5

Source: ABS 2001



Some Current Issues Affecting the Outdoor Industry

Access-related

- Outdoor recreation not seen as a valid land use in its own right and consequently poorly planned for, especially for some 'hard to place' activities
- Conflict between user groups (activity groups, types of user)
- Increasing/changing demand and sufficient access to meet demand
- Choice in range of recreation opportunities not available within "reasonable" proximity, leading to overuse of some locations
- Lack of understanding of land tenure and associated legislation
- Poor communication between landholders & community resulting in misunderstandings
- Differing requirements/inconsistencies for permits
- Insufficient research on impacts caused and how to manage
- Restriction of access due to fear of litigation
- Management of areas which cross tenure



Issues (cont'd)

Workforce-related

- Time
- Inadequate numbers of skilled leaders
- Lack of cost effective, industry indorsed skills recognition
- Confusion about accreditation and registration options
- Expectations of clients vs willingness to pay
- Increasing professionalism and decreasing volunteerism
- Increasing 'paperwork' requirements
- Poor industry profile (eg. as a career) and marketing of benefits

Other

- High incidence of obesity
- Many competing leisure activities
- Large volume of "noise" makes it difficult to get messages out
- Funds!



WA Survey Data

- Impediments to growth (time, staff/volunteers)
- Employment characteristics
- Skill shortages
- Delivery of suitable training
- Staff retention
- Access to land/water for activities
- Implementation of accreditation



“Foresight”

Have the goalposts moved and/or do we need to modify our original strategy?



Participation

- US trend data suggests that increasing focus on activities “Done in a Day”
- ‘Back to basics’ philosophy in some schools
- Emphasis on urban/close to home activities due to fuel costs, decreased time, etc
- New activities (eg. Parkour, recreational tree-climbing, trail running)
- Growth in some activities (eg. MTB, cycling)
- Change in focus on some activities (eg. adventure races)
- Group activities based on public or organised transport as issues of ageing, fuel costs and transport congestion change behaviour patterns
- Impact of ageing population on activity choices



Workforce

- Longevity rates rising, along with a continuing trend to have fewer children; with a booming economy, demand for labour exceeds supply
- Smaller working age population: 66% of population is aged 15-64 yrs; by 2050 it will decline to 57%.
- An employee's market; the skills shortage is a demographic reality and will be with us for a generation or more
- Length of time with an employer is in freefall (Av. = 15 years in 1960, 2006 average tenure is 4 years)
- There are more careers on offer; Av. school leaver today will have at least 6 distinct careers in their working life
- Generation Y demand work/life balance from the start of their career – they don't feel the need to earn it. (over 40% of Gen Y is employed on a casual basis)
- Australians work the longest hours of any OECD country (20% of employees work >50 hours/week)
- Traditionally, older workers were supervisors/managers, younger were apprentices & 'juniors'. Now a flatter structure with teams of varying ages



Characteristics of Generation Y Employees

	Baby Boomers Born 1946-1964 Aged 40's & 50's	Generation X Born 1965-1979 Late 20's & 30's	Generation Y Born 1980-1994 Teens and 20's
Values at work:	Work ethic Industry-focus	Achievement Company-centric	Ownership Individuality
Motivations for work:	Financial security Responsibility	Career progression Opportunity	Job variety Creativity
Influences over career choice:	Parents Authorities	Careers Advisors Experts	Internet Peer Groups
Shapers of career perception & views:	Tradition Reputation	Observation Recommendation	Perception Experience
Key management tools:	Recruiting Supervising	Training Promoting	Innovating Empowering
Key communication tools:	Technical data Evidence	Visual examples Demonstration	Hands-on learning Participation
Typical training style:	Formal Monologue	Programmed Dialogue	Interactive Multi-modal
Typical leadership style:	Control Thinkers	Coordination Doers	Consensus Feelers
Influencers and Values:	Local Long-term needs	Regional Medium-term goals	Global Short-term wants
Management approach	Telling "Yes boss"	Selling "What's in it for me"	Involving "Here's what I think"



What will be the impact of.....

- Skill shortages
- Identified impediments to growth
- Increasing competition for open space (for housing, infrastructure such as roads, transmission lines, dams)
- Higher densification in urban areas increasing the need for open space/parks
- Difficulty in provision of land particularly for hard to place activities (eg. Trail bike riding, down hill MTB)
- Inadequate public land for recreation; how will the provision or acquisition of publicly accessible land be funded?



What will be the impact of current initiatives?

- Training Package review with identification of Skill Sets (& therefore greater links to NOLRS)
- Development of Adventure Activity Standards (with links to NOLRS and accreditation) in all States
- Discussion Paper and 2008 Outdoor Summit
- (Hopefully) a National Outdoor Industry Strategy



The Outdoor Adventure Industry of the Future

- Where to from here?
- How?
- Who?



Challenges for the Future

Short to medium term

- Ensuring better planning for provision of places to conduct outdoor activities
- Dealing with all the factors impacting upon skill shortages
 - industry endorsed, cost effective skills recognition
 - access to suitable training
 - staff retention

Ongoing

- Defining who we are and spreading a simple, united message
- Dealing with opposition to change
- Dealing with diversity and complexity
- Dealing with passive players
- Dealing with ill informed players



Who will take us there?

Managers

Respond to change

Path Takers

Do the thing right

Guided by Fate

Control

Work *in* the organisation

Probable Futurist/Prophet

Problem Centred Strategist

Leaders

Create and Shape change

Path Maker

Do the right thing

Guided by Destiny

Facilitate

Work *on* the organisation

Preferred Futurist/Visionary

Mission Directed Strategist



If you were given the task of envisioning and constructing a vision for the Australian outdoor adventure industry in 10 years:

- **What do you want to transform the industry into?**
- **What would be the core components of such a vision?**
- **What would be the core elements of the strategy to realise such an outcome on the ground over (say) 10 years?**
- **What would be the respective roles and responsibilities of each of the key stakeholders in creating such an outcome?**
- **What new things do you want to do, and what old things do you want to cease to do?**



- **What are OCA and Outdoors WA doing to prepare the industry for the future? Is it enough?**
- **What are YOU doing to lead the industry into a desirable future? Are you a manager or a leader?**
- **Is it “they” or “I” who will lead?**
- **What is the Government doing? How can we influence the outcomes?**

- **Where are we at on our journey?**



It is the journey, rather than the destination, that is important



There are a few people who *make things happen*,
there are rather more who *watch things happen* and
there is the rest of humanity who say *what
happened*

President of Columbia University in the 1890s

