September 2025

Submission to Jobs and Skills Australia

Core Skills Occupation List – Outdoor Leader or Guides and Outdoor Guide Trainers

Introduction

Outdoors NSW & ACT, as the peak body for outdoor recreation, education, adventure tourism, outdoor events, and nature therapy, welcomes the opportunity to provide a submission to the Core Skills Occupation List review. The Outdoor Census (2024–2025) highlights acute workforce shortages in outdoor guiding occupations, placing at risk the sector's ability to deliver safe, high-quality outdoor experiences across New South Wales, the ACT, and nationally.

We strongly urge Jobs and Skills Australia to consider Outdoor Guides and Outdoor Guide Trainers for inclusion on the immigration priority list, ensuring accessible visa pathways that can address immediate workforce shortages while supporting the long-term development of this essential industry.

Workforce Shortages and Barriers to Hiring Australians

The 2024 Outdoor Census identified a need for almost 12,000 additional qualified outdoor workers in NSW and the ACT alone, rising to a shortfall of 14,350 in January 2025 if unmet demand is included. Employers consistently report difficulty finding staff with the Certificate III in Outdoor Leadership and Wilderness First Aid, as well as higher-level Diplomas and Degrees in outdoor disciplines. While training pathways exist, they are limited in number and inconsistent in availability, resulting in insufficient graduates to meet workforce demand.

Barriers to hiring Australian workers include:

- High casualised employment structures, and seasonal.
- Rising operational costs that limit organisations' ability to sponsor visa holders.
- Limited professional development pathways in Australia compared to international counterparts, reducing opportunities for local workers to upskill into advanced guiding and training roles.

Entry-Level Pathways

Australian workers do have clear entry points into the sector, typically via Certificate II and III in Outdoor Leadership, supported by short courses such as Wilderness First Aid. Many organisations also provide casual or volunteer positions as stepping stones into the industry. Traineeships are an increasing attractive option for employers but access to training limits this potential.

Progression beyond entry-level is limited, with fewer Diploma or Degree programs and minimal structured professional development for experienced staff. This restricts the growth of a mature, highly skilled domestic workforce.

International Skills Gap

Compared to Australia, international outdoor industries—such as those in New Zealand, Canada, and the UK—have more advanced training frameworks and professional recognition systems. Their guides and trainers often hold higher-level, tiered qualifications that embed technical, leadership, and specialist expertise. Australia, by contrast, remains in the early stages of building this maturity, leaving us reliant on attracting internationally trained guides and trainers to supplement our workforce while we continue to develop our own systems.

Visa Barriers

The current migration framework is a critical barrier for outdoor occupations. The sector is not recognised as a priority area, meaning visa applications are frequently delayed or disregarded. This has practical consequences: many employers are reluctant to advertise internationally, knowing the chances of successful visa approval are slim.

Additional difficulties include:

- Salary thresholds that exceed typical earnings for outdoor guides, making common visa categories inaccessible.
- High sponsorship costs that are unfeasible given increasing operational expenses.
- A mismatch between regional visa frameworks and the reality of the industry: while organisations may have city-based offices, nearly all outdoor guiding work occurs regionally or remotely.

Prior to COVID-19, temporary skilled migrants were a vital part of the outdoor workforce. Border closures and visa delays have since cut off this supply, with no clear pathway for their return. Without reform, the industry remains unable to access this critical source of skilled labour.

Why Demand Will Grow

The demand for outdoor guides and trainers will continue to rise sharply over the next five years due to:

- Tourism Australia's active marketing of eco-tourism and adventure tourism to international visitors, positioning Australia as a global destination for nature-based experiences.
- The rapid growth of nature therapy, with outdoor therapy activities now embedded in 35% of outdoor organisations (up from just 4% in 2024).
- An escalating mental health crisis, with outdoor experiences increasingly prescribed as part of community wellbeing strategies.
- The recognition by educators and parents that children must spend less time on screens and more time outdoors, with outdoor education fostering resilience, teamwork, and personal development.

These factors place outdoor occupations at the heart of Australia's tourism, education, and health agendas.

Recommendations

To secure the future of this essential workforce, we recommend that:

1. Outdoor Leader or Guides and Outdoor Guide Trainers be added as priority roles.
2. Visa salary thresholds and sponsorship requirements be adjusted to reflect the realities of outdoor occupations.
3. Regional visa frameworks be reformed to recognise that outdoor guiding is inherently regional, regardless of head office location.
4. Fast-tracked visa pathways be established for internationally trained guides and trainers, complementing efforts to strengthen domestic training and professional development.

Conclusion

The outdoor industry is at a crossroads. Without urgent attention to workforce shortages and visa access, Australia risks losing its ability to deliver safe, sustainable, and high-quality outdoor experiences. At the same time, the sector is uniquely placed to support national priorities in tourism, health, education, and community wellbeing. Recognising outdoor guiding occupations on the immigration priority list is essential to meet demand, attract international expertise, and secure the future of this vital industry.

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THE OUTDOOR INDUSTRY

In NSW and the ACT

Data compiled from the 2024 & 2025 Outdoor Census

YEARS OF ADVOCACY

ABOUT OUTDOORS NSW & ACT

Our organisation exists to lead a thriving sustainable outdoor industry.

Outdoors NSW & ACT is the peak body supporting the Outdoor Recreation, Education, Adventure Tourism and Outdoor Events and Therapy sectors that connect the community to nature for their health, development, skill-building, and wellbeing.
We provide our industry with a larger voice, opportunities, and leadership. Members receive business and activity support, marketing, and opportunities that build their capacity to remain a sustainable entity.

ABOUT THE OUTDOOR CENSUS

The Outdoor Census is a vital initiative to gather real-time, evidence-based data from across the outdoor sector. It plays a crucial role in capturing the needs, challenges, and opportunities faced by outdoor providers, educators, guides, and businesses operating across NSW and the ACT. The Census helps build a picture of the current state of the industry—something that has long been missing from national datasets.

For Outdoors NSW & ACT, the Census is more than just a survey—it's a key tool in delivering on our mission to support, connect, and grow the outdoor industry. This data strengthens the sector's voice when advocating for policy change, funding, and strategic support. The insights from the Outdoor Census also ensure we're representing our members with clarity, credibility, and impact.

2024
KEY TAKEAWAYS

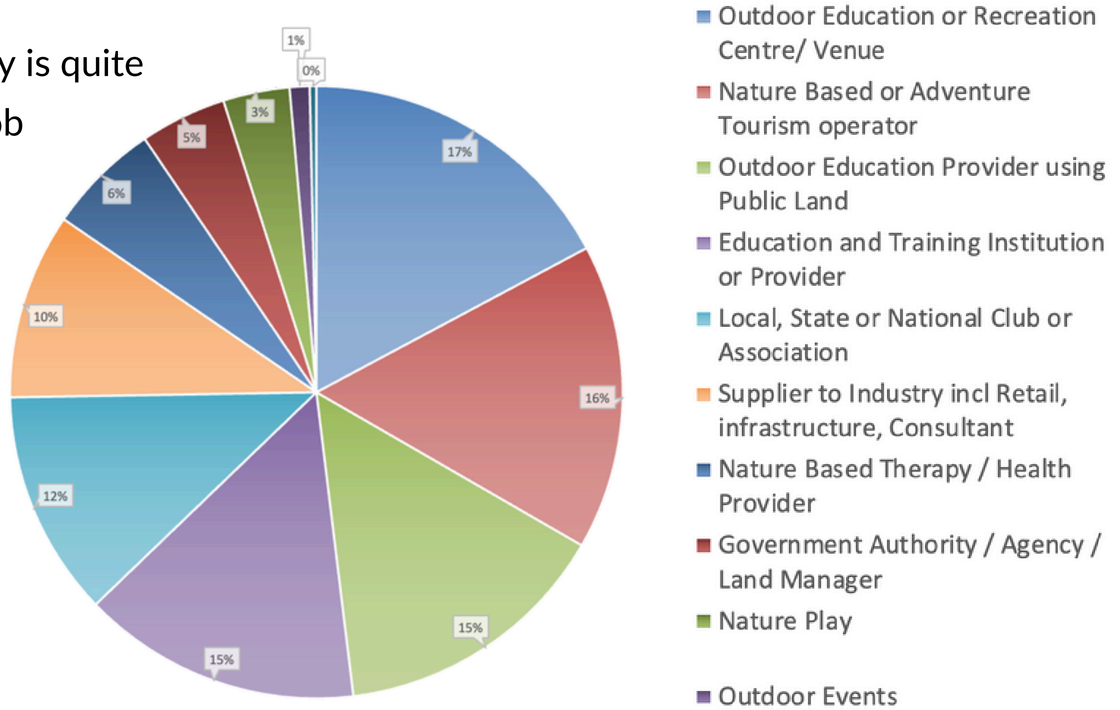
43,719 Outdoor Workers

(decline of 12.3% since 2023, and a decline of 42% since 2019)

72% of workers hold accredited qualifications of which 78% hold Accredited **Outdoor** Qualifications

2% growth in participant numbers was predicted in January 2024 for the 2024 calendar year however the results provided in January 2025 showed a 1% decline in 2024.

Thr Outdoor Industry is quite diverse with many job opportunities across all sectors of the industry



73% of all organisations supply services direct to consumers, while 27% of the organisations provide services to the industry itself.

DEMAND FOR NEW EMPLOYEES WAS EVIDENT

An average of 8 extra workers were needed per business, 7 of which required Outdoor accredited qualifications, thus **11,959 workers in NSW & ACT were needed with an outdoor qualification.** The priority qualifications are indicated in the table below.

Activity Certi or Cert II	Certificate III in Outdoor Leadership	Certificate IV in Outdoor Leadership	Diploma in Outdoor Leadership	Degree in Outdoor associated field	Wilderness First Aid	Other quals
804	1261	3719	775	561	4008	832

2025
KEY TAKEAWAYS

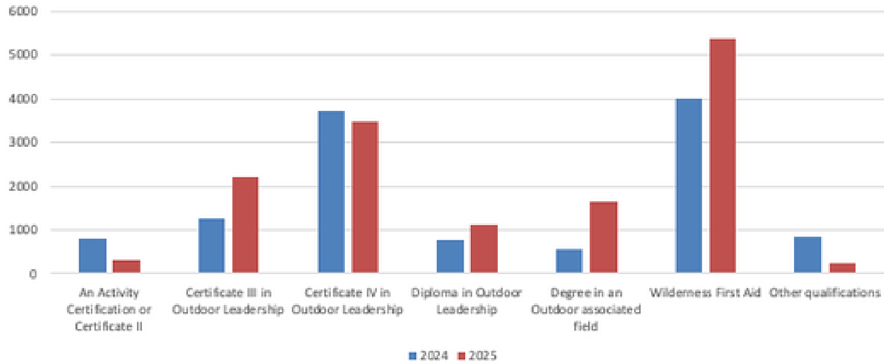
Qualifications still sought after

Employers noted more need for Certificate III graduates and Wilderness First Aid, with a surprising increase in demand for higher education in Diplomas and Degrees in Outdoor disciplines.

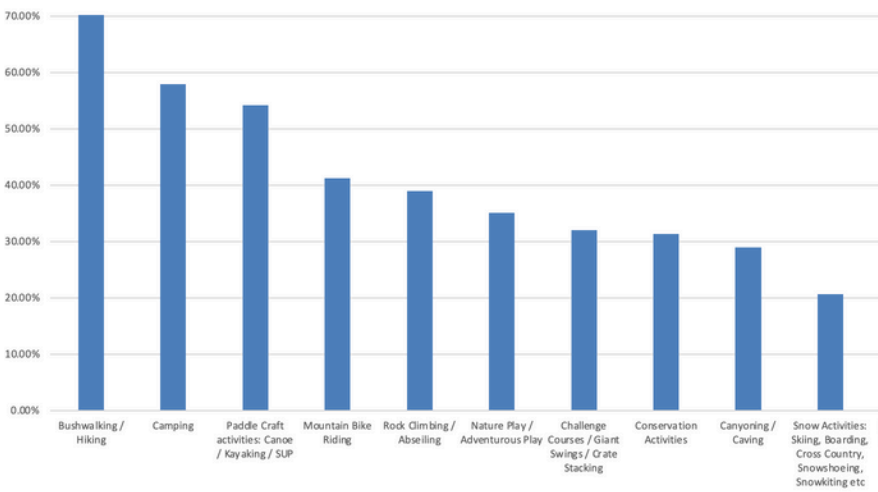
The **demand for workers is still strong with a potential 14,350 people employed in the industry should they have been available in January 2025.**

42,056 Outdoor Workers

3.8% decline on 2024
44% decline since 2019



This showcases the increased reliance on the SIS Sport & Recreation Outdoor Leadership qualifications in the industry. But also highlighting the increased need for management skills as employers seek higher qualifications.

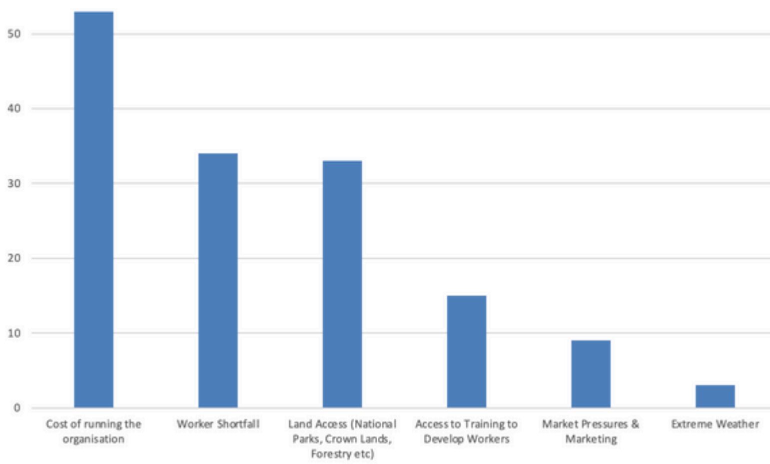


The most conducted activities in the industry by the organisations are;

- Bushwalking / Hiking
- Camping
- Paddle Craft
- Mountain Bike Riding
- Roping Activities
- Nature Play *

*Nature play has increased in ranking since 2024 when it constituted only 4% of the market yet activities are now imbedded in 35% of the activities.

Organisations in the industry highlighted the top reason for their inability to maximise their potential was the cost of running the organisation (52%), with worker shortfall (34%), and land access (33%) also contributing highly to the challenges.



The industry's net promoter score (NPS) dropped from 33 in 2024 to 14 in 2025. This is reflective of the number of challenges organisations are seeing in the industry and how it effects morale.

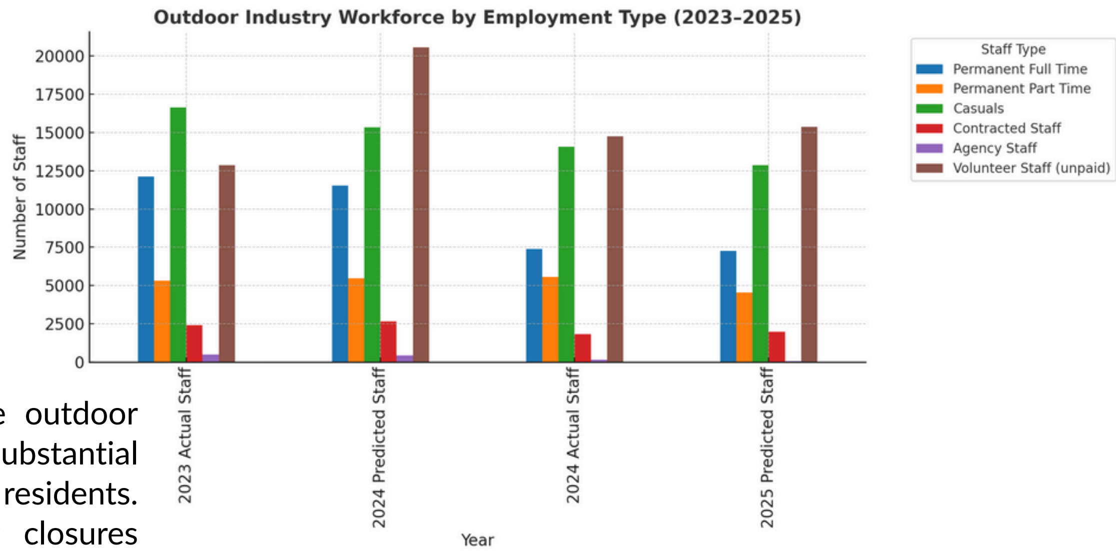
YEARS OF ADVOCACY

2024 VS 2025

STAFF

2019 - 75,000* staff
2023 - 49,862 staff
2024 - 43,719 staff
2025 - 42,056 staff

*Marsden Jacobs Report, 2019



Prior to COVID-19, the outdoor industry employed a substantial proportion of temporary residents. The pandemic's border closures and ongoing visa processing delays saw workforce numbers drop sharply to 49,862 in 2023. While there was a predicted recovery to 56,003 in 2024 this did not eventuate as ongoing labour shortages, reducing capacity in qualification delivery and competition from other industries have contributed to numbers falling to our **lowest level** in 2025.

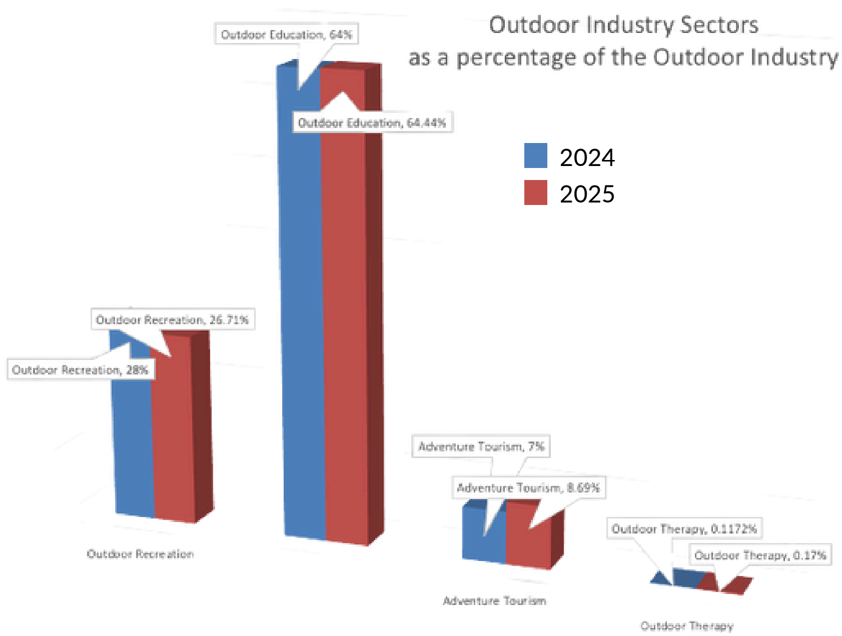
The organisations in the outdoor industry indicated they have an average of 16% attrition year to year.

Reasons for staff leaving in 2024 included...	Percentage of employers
• Relocation (Seasonal work, university, travel, moving towns/overseas)	**21%**
• Pursuing further education or study-related reasons	**17%**
• Seeking full-time employment or career growth	**15%**
• Burnout and work-life balance challenges	**14%**
• Retirement or leaving due to personal reasons	**11%**
• Casual employment limitations	**10%**
• Other opportunities or career changes	**8%**
• Volunteer/Seasonal Staff leaving after completing their commitment	**4%**
• Conflict or poor fit	**3%**

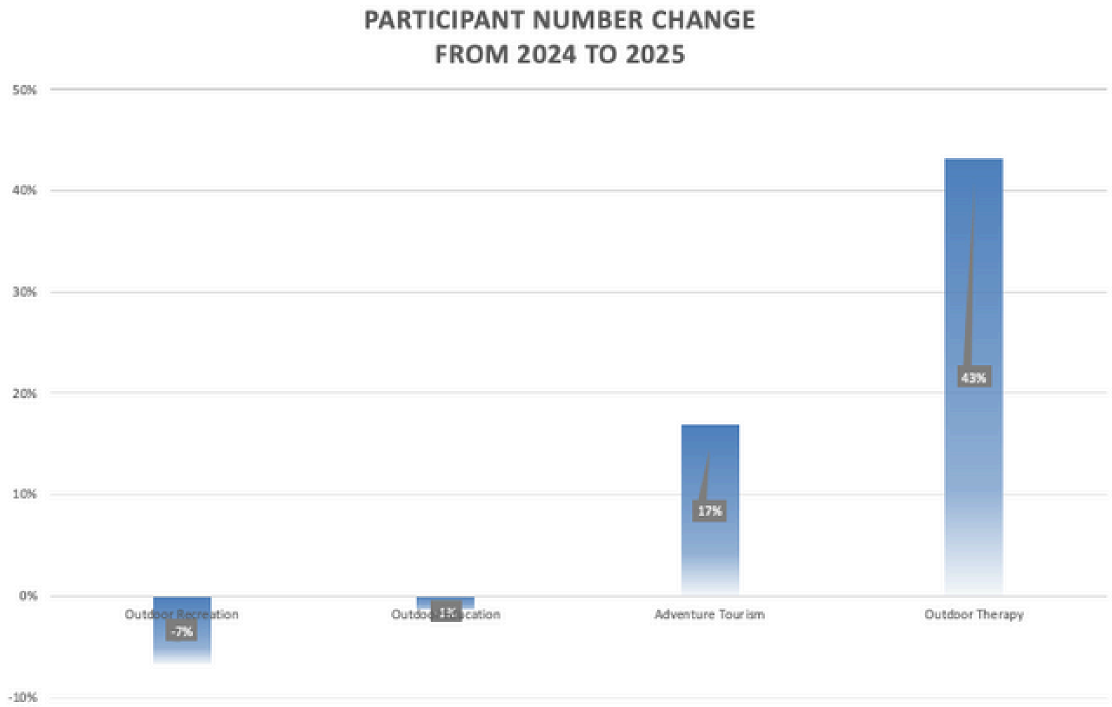
PARTICIPANTS

Outdoor Education participants dominate the outdoor industry across all four sectors, followed by Outdoor Recreation. It is important to note the **sector percentage of the whole industry has shifted from recreation to tourism**, the change in participant numbers is indicating a growth in the minority sectors. The demand continues to grow as indicated by the employers ability to employ more staff, should they be available.

NOTE: this census only measures participants that dependently led by the organisations that complete the census and do not include passive recreators conducting their own activities.



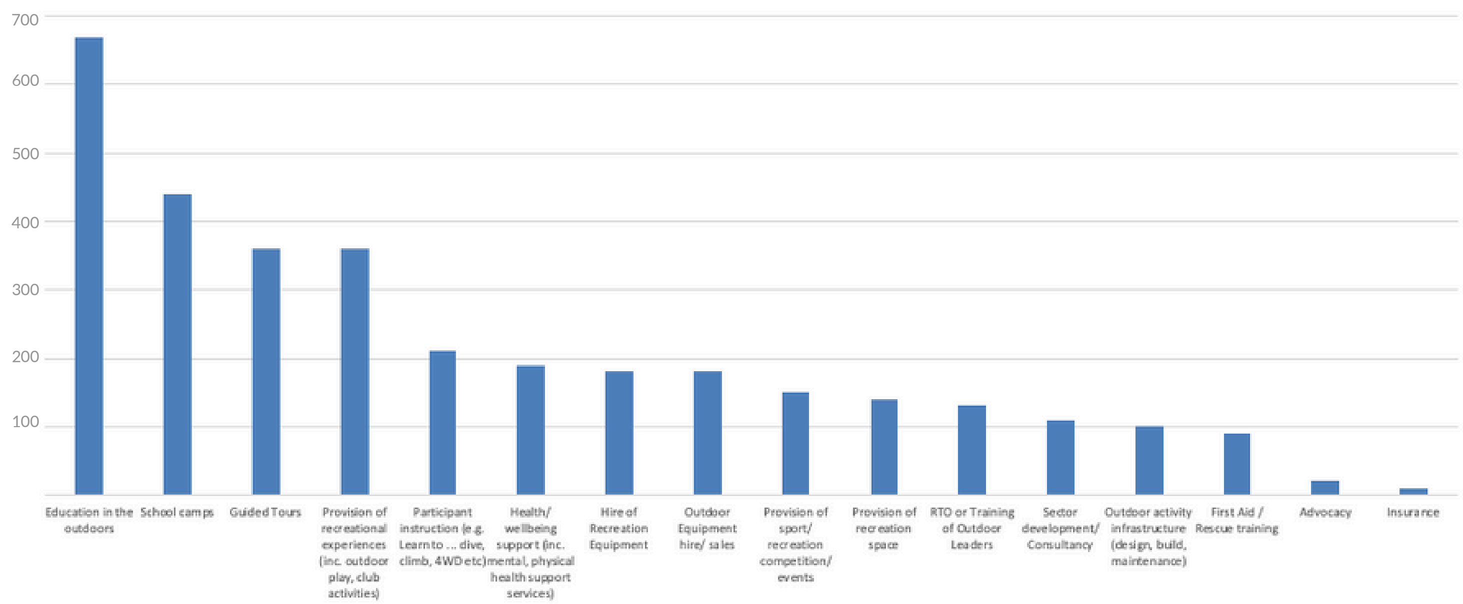
2024 VS 2025 CONT.



Overall numbers of participants have dropped in outdoor recreation and education, being the two largest sectors. This seems to be influenced by the inability of recruiting vacant positions or management having the time to recruit further staff. The two smaller sectors of the industry, adventure tourism and outdoor therapy are seeing a growth in participants. **Worker shortfall remains at the second most inhibiting reason that limits organisational growth.**

ORGANISATIONS

The offering by the outdoor industry is varied, and this graph shows the organisations main services, experiences or activities that they provide. This was the first year this question was asked so can not be compared to recent years.



This graph shows that education in the outdoors is the most common service provided by organisations in the outdoor industry, followed by school camps, guided tours and recreational experiences. The 6th most common activity is health and wellbeing support, again highlighting the focus of this sector across all organisations and not just the ones that categorised themselves as nature therapy organisations.

CHALLENGES FACING THE INDUSTRY

- **Workforce shortages and skills gaps**
- Rising **operational costs**
- Barriers to **land and waterway access**
- Seasonal and casual employment **structures limiting retention**
- **Maximising the potential** of the industry
- Keeping up with the **growth of tourism and therapy areas** with the right skills

KEY TAKEAWAYS

The Outdoor Census data shows a critical need for:

- **Workforce Attraction** - Bringing in new people into the outdoor industry
- **Workforce Development** – Investment in training and accredited qualifications
- **Visa and Migration Pathways** – Faster processing, policy allowances and conditions for skilled outdoor workers
- **Mental Health and Retention Strategies** – Addressing burnout and retaining employees in the industry
- **Sector Shifts** - Consider the growth in tourism and therapy and if they are catering for in the strategies
- **Collaborating as an Industry** - The industry needs to work together towards solutions to these problems.

Disclaimer

The data analysis presented herein is based on information collected from a census conducted within the outdoor industry across New South Wales (NSW) and the Australian Capital Territory (ACT). The census received a total of 193 submissions (2024) and 128 subnmissions (2025) and was supplemented with data from the Australian Bureau of Statistics (ABS).

While every effort has been made to ensure the accuracy and completeness of the data, the following points should be considered:

1. Sample Size and Representation: The census captured responses from 321 surveys, which may not fully represent the entire outdoor industry in NSW and the ACT. The findings should be interpreted with this in mind, recognising that certain sectors or demographic groups may be underrepresented.
2. Data Accuracy: The data has been analysed based on the submissions received and ABS data available at the time. However, the accuracy of the data relies on the accuracy of the information provided by the respondents and the currency of the ABS data. Any errors, omissions, or misrepresentations in the original data sources may affect the final analysis.
3. Assumptions and Estimations: In cases where data was incomplete or ambiguous, reasonable assumptions and estimations have been made to complete the analysis. These assumptions may influence the outcomes and should be considered when interpreting the results.
4. Temporal Relevance: The data reflects the state of the outdoor industry as of January 2024 & January 2025. Changes in the industry after this period are not captured in this analysis and should be taken into account when applying these findings to future contexts.
5. Limitations of ABS Data: The ABS data used in this analysis was the most current available at the time. However, it may not fully align with the specific needs or nuances of the outdoor industry in NSW and the ACT. Users of this analysis should be aware of these limitations.

Outdoors NSW & ACT and its affiliates accept no responsibility for any errors or omissions in the data or for any actions taken based on the information provided in this analysis.

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