

— Outdoor recreation

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The outdoor recreation workforce is made up of the professional guides and instructors who manage visitors' experiences in the wild places of New Zealand.

From mountain biking and bushwalking through to rock climbing and kayaking, outdoor recreation staff represent a broad spectrum of disciplines and practice areas. Their purpose and drive comes from a belief in the value of the natural world as the setting for education, exercise, relaxation and self-growth.

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Industry structure



OUTDOOR EDUCATORS

Councils, community groups and any of the approximately 70 Christian Camps that offer outdoor experiences, tertiary institutions, secondary teachers, and non-profit outdoor centres like Hillary Outdoors, Outward Bound and Whenua Iti Outdoors.



OUTDOOR LEISURE GROUPS

Non-profit clubs and groups like the New Zealand Alpine Club and Federated Mountain Clubs (FMCs), youth groups such as Scouts and Guides, and council-run outdoor programmes and community groups.



COMMERCIAL OUTDOOR OPERATORS

Adventure tourism operators like Zip Trek, Queenstown Rafting, Fat Tyre Adventures, North West Adventures and Waitomo Adventures.



OUTDOOR SPACES KAITIAKI

Rangers employed by the Department of Conservation and regional councils, who monitor and maintain wilderness areas including national parks, regional parks, forests and wetlands. City council staff who manage and develop parks and reserves.

Workforce profile

There were some 12,164 people employed in outdoor recreation in 2018, or 0.48% of New Zealand's total workforce.

Some 52% of workers in the sector were male – about on par with the national gender split.

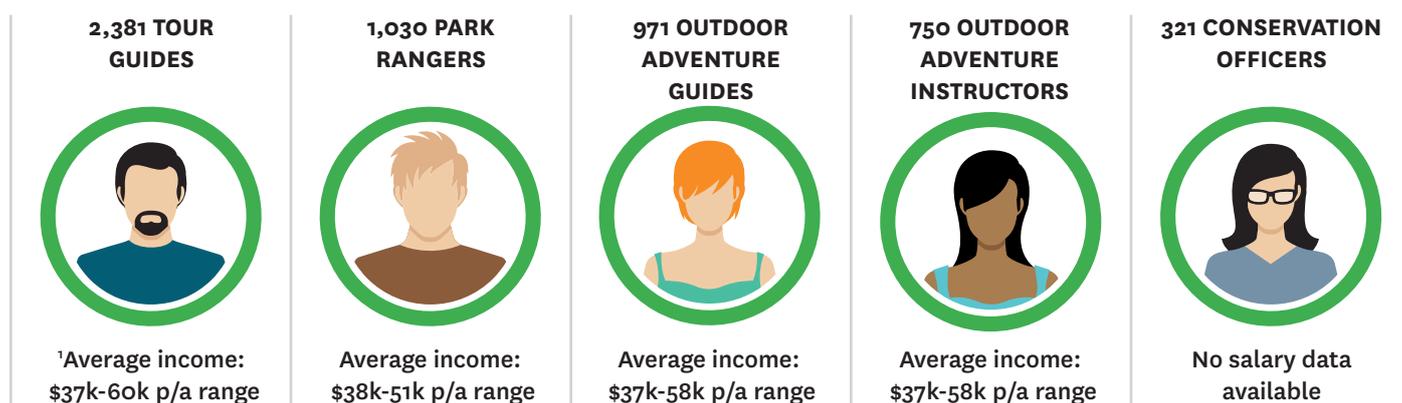
The outdoor recreation workforce, which was characterised by a growth plateau between 2010 and 2015, is now continuing on a strong upward trend. It grew by 5.1% in 2018, compared to a national growth figure of 3%.

It is forecast to continue growing, reaching 14,485 filled jobs by 2024, with between 300 and 400 new job openings each year.

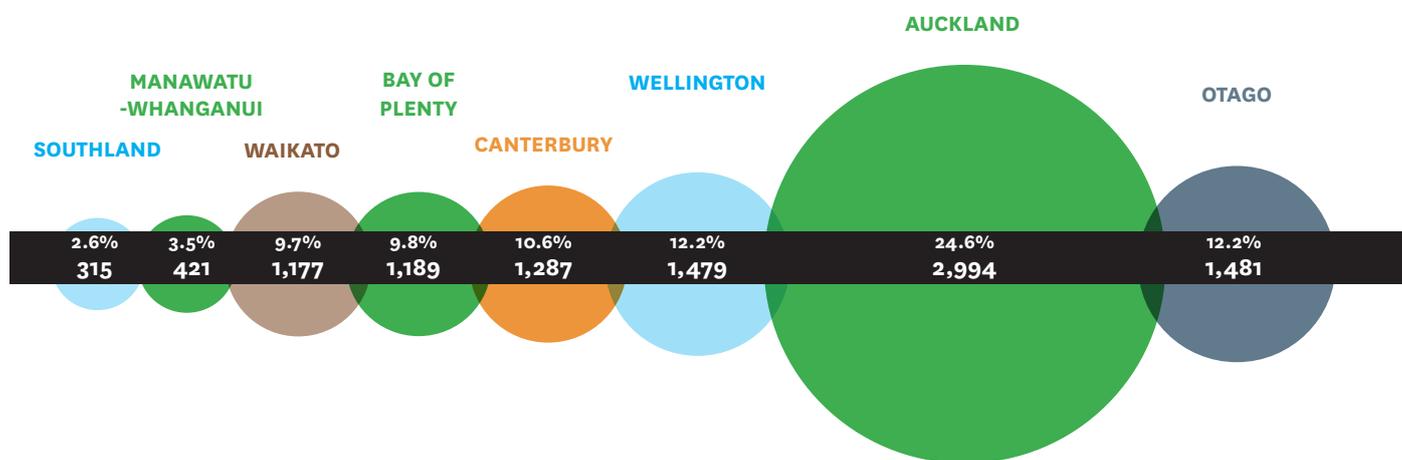


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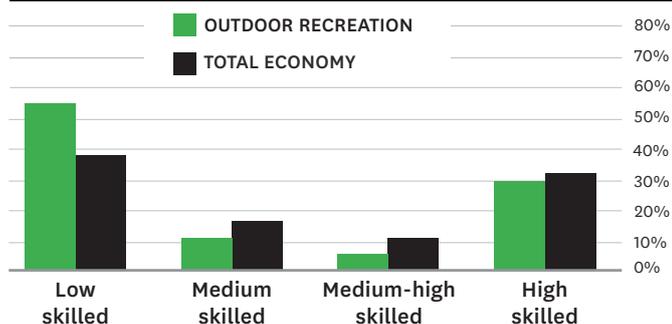
TOP FIVE JOBS BY VOLUME IN 2018



REGIONAL EMPLOYMENT (JOBS) IN 2018



SKILL LEVEL



AVERAGE EARNINGS

In 2017, the average annual income in outdoor recreation was \$53,400, compared to \$58,900 for the economy as a whole.

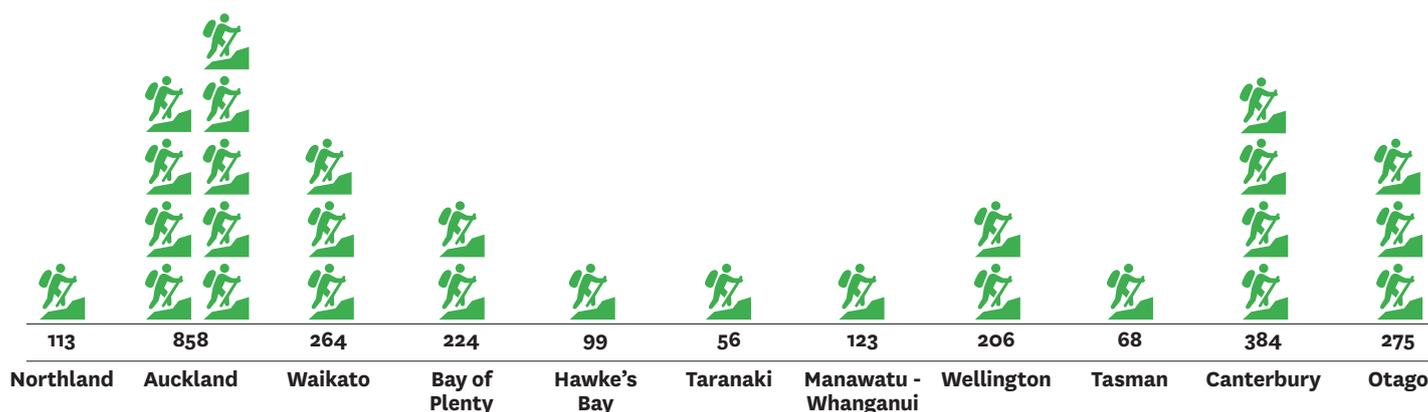
EARNINGS GROWTH

Industry salaries grew by an average of 3% per year between 2007 and 2017.

SELF EMPLOYMENT

The self employment rate in 2018 was 16.6% or 2,024 people.

REGIONAL BUSINESS UNITS



Economic impact

The outdoor recreation sector generated \$845 million in GDP in 2018, a contribution of 0.35% of the total economy.

The increase of 3.4% in 2018 capped off four years of GDP growth, and was slightly above the national GDP growth rate of 3.2%.

For the year, the industry produced \$77,543 in GDP per head (full-time equivalent). This figure was down 1.7% from 2017.

There were 2,876 businesses operating in outdoor recreation during the year, with an average of 4.2 employees in each business.

The total number of outdoor recreation businesses was up 2.5% from the previous year. Over the past five years, the number of businesses in the industry has increased by 16%.

By contrast, business units across the economy as a whole have grown by 7.4% in that time.

ECONOMIC CONTRIBUTION
\$845M
GDP
0.35% of New Zealand's GDP in 2018

Workforce challenges

A Skills Active survey of the outdoor recreation workforce found that for many organisations, recruiting local candidates is not easy. Some 40% of respondents said they had frequent problems finding New Zealand candidates, and another 40% said it was occasionally a problem.

“We are recruiting a lot from the UK at the moment as the contractor pool of New Zealanders gets smaller and smaller every year,” one respondent said.

The biggest recruitment barrier was the work-readiness of applicants.

“From my observation the skill level of instructors is lower now than it has been for 20 years. Some applicants can't

give a grid reference... Many have done no or few personal trips,” one respondent said.

Other barriers putting off potential candidates were seasonal work, remote locations and relatively low pay. Many respondents cited outdoor instructors as the hardest roles to fill.

Asked about the pressures impacting their industry, many respondents cited a higher compliance load.

Themes and trends

Environmental threats linked to a warming world are affecting outdoor operators around the country.²

The Christchurch Adventure park, which had to rebuild after the Port Hills fire, lost tree cover from 240 of its 365 hectares – meaning more exposure to the weather, and drainage and erosion issues.³

Efforts to prevent the spread of kauri dieback have seen some 30 DOC tracks closed.⁴ In the Waitakere Ranges, operators have said the public perception is that the entire range is closed, which is keeping people away despite

many areas being open.⁵

Increasingly, operators who use the conservation estate are applying the Tiriti o Waitangi principle of co-governance with Māori, in the way they design and run their activities.⁶

Meanwhile, increased funding is coming online for programmes that open the outdoors to groups with historically lower levels of participation. For instance, through the 2019 Young Women's Activation Fund, there will be a pool of \$2 million for a number of projects including the Girl Guiding New Zealand community scheme, and Dirt is Good, a mountain biking initiative in Porirua.⁷



Active Careers through
On-Job Qualifications

²Climate change implications for New Zealand, 2016, Royal Society of NZ ³Christchurch Adventure Park celebrates one year of being back open after Port Hills fires, December 2018, Stuff

⁴Track closures to prevent the spread of kauri dieback, Department of Conservation ⁵Kauri dieback killing businesses as well as trees, as track closures begin to bite, July 2018, Stuff

⁶Partial review of Conservation and National Parks policies to give better effect to Treaty principles, August 2019, Department of Conservation ⁷Nine projects to receive funding support through Sport NZ's Young Women's Activation Fund, October 2019, Sport NZ