Queensland Outdoor Sector Survey 2010: Outline of Results

This survey has been designed and delivered by the Queensland Outdoor Recreation Federation (QORF)

Date: *December 17, 2010*

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1.0 Introduction

This report summarises information collected from a survey compiled by the Queensland Outdoor Recreation Federation (QORF). The survey aimed to collate data from the outdoor sector in Queensland with the purpose of indicating and quantifying industry trend data and identifying areas in which organisations require further assistance. The survey captured a state wide overview of the outdoor industry and it's progression over time, aiding QORF in advocating on future matters specific and relevant to the outdoor industry. The report includes information on user groups that took part in the survey, how the information was gathered, feedback received, and conclusions and recommendations made based on survey results.

1.1 Background

Following on from previous Queensland Sector Surveys in 2006 and 2008, the Outdoor Sector online survey was revised. This was done for three reasons. One, to make the survey commitment for respondents less demanding; two, to capture key, current issues for investigation; and three to enable the sector in Queensland to focus on responding to the National Outdoor Survey. This latter survey was developed in collaboration with Service Skills Australia to begin to capture more rigorous and complete data on the size and scope of outdoor recreation/ education in Australia and required some detailed effort to complete. To complement this survey, yet still provide more complete details regarding the outdoor recreation sector for the state of Queensland, a revised State Survey was developed.

2.0 Method

Targeted electronic invitations were sent to over 150 outdoor recreation organisations that compile QORF's membership base providing an explanation of the survey and a link to the survey website. This information was also distributed through the October QORF e-newsletter.

Prior to completing the survey, participants were informed of the purpose of the survey and the estimated time it would take to complete. Participants were asked a series of questions in the following areas:

About Your Organisation
Organisation Employment/Volunteer Structure
Ownership
Organisation Status
Activities
Organisation Training/Education Information
Standards
Funding/Sponsorship
Turnover
Products and Services Requirements

3.0 Results

A About your organisation

A1. To which regional area/s do you/your organisation provide services?

121 organisations took part in the survey, although not all participants completed every question. Respondents to the survey predominantly provided services around the Brisbane area, however organisations provided services across a broad geographic area in the South East of the state:

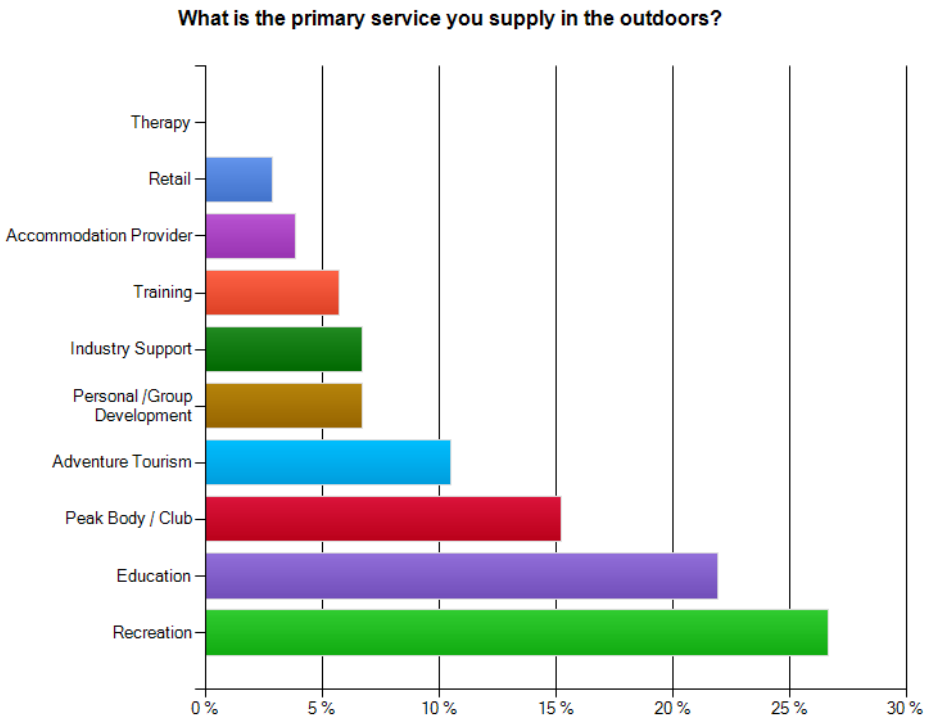
- 32% Brisbane
- 28% Sunshine Coast
- 27% Gold Coast
- 23% Ipswich/Boonah

Other respondents provided services, variously Interstate, in Northern NSW, or to Toowoomba, Darling Downs, Central Queensland, Rockhampton, Wide Bay, Bundaberg, Maryborough, Gympie, Townsville and Mackay.

Over 55% of organisations that responded had been involved in the outdoor sector for over 16 years.

A2. What is the primary service you supply in the outdoors?

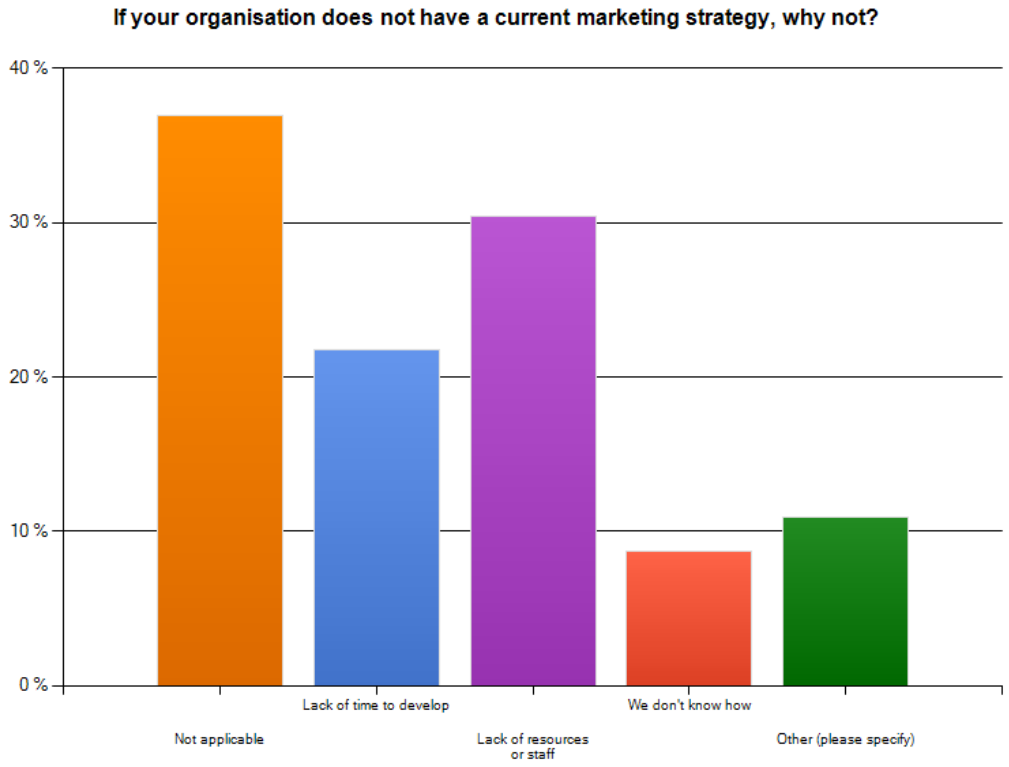
27% of respondents indicated the main service supplied by their organisation was recreation, 22% said education and 15% said they were the peak body or club for an activity. No one who identified as primarily an Adventure Therapy organisation responded to the survey.



A3. Does your organisation have a current marketing strategy/plan?

Just over half (53.5%) of respondents indicated they did have a current marketing plan, leaving 46.5% indicating their organisation did not have a marketing plan.

The reasons for not having a marketing plan varied. 37% of respondents without a plan indicated that a marketing plan was not applicable to their circumstances. An additional 30% said a 'lack of resources or staff' prevented their organisation having a marketing strategy and 22% indicated 'lack of time' was the biggest issue. 'Lack of capacity' to create a marketing plan was noted, with 8% (or 4) respondents providing this answer. An additional 5 respondents provided an 'other' response and variously indicated they did not need a plan, were still seeking clarity about their role in outdoor recreation and/or were in the process of currently developing plans.

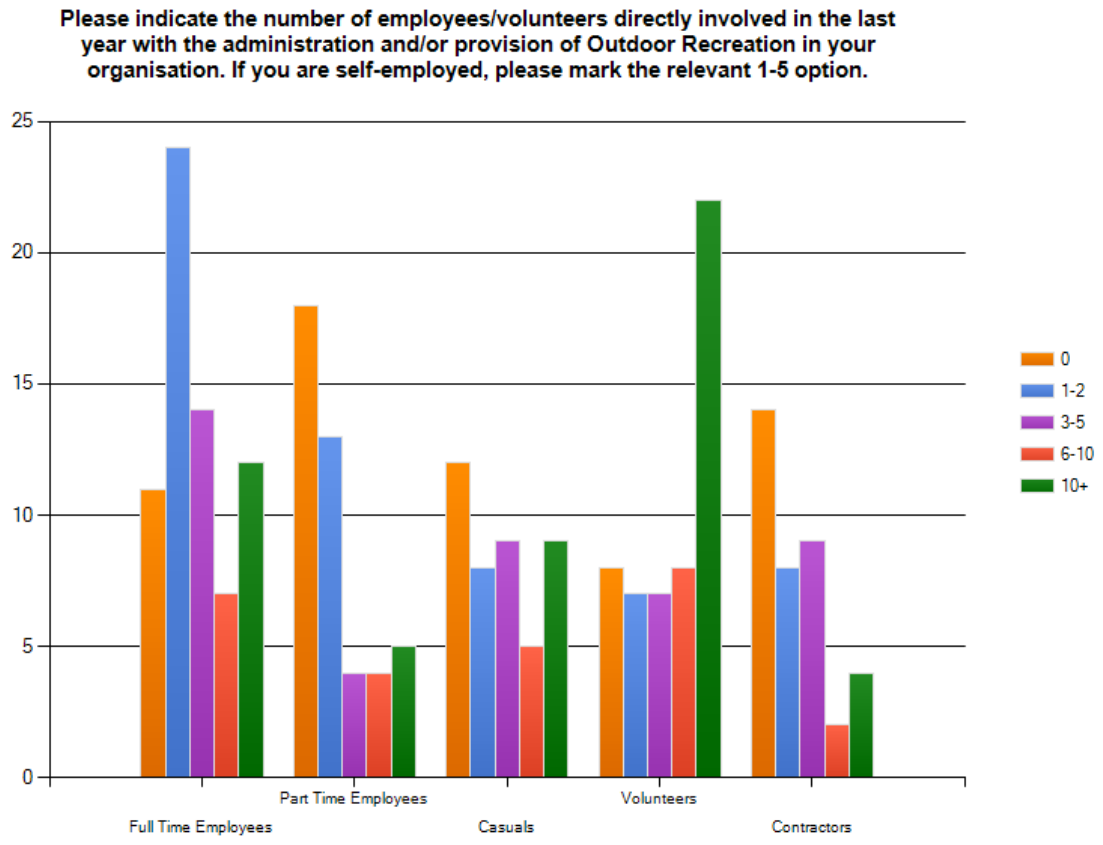


A4. Does your organisation have a current strategic or business plan?

While 29% indicated their organisations did not have a business plan, 71% said that they did. Of those that did not, the largest reason given was that it was 'Not applicable' (38%), followed by 'Lack of staff or resources' (28%) and 'Lack of time' (24%). Only 2 organisations said they did not know how to develop a business plan. Three respondents provided an 'Other' response indicating that either outdoor recreation was a small part of their organisation therefore there was no specific plan for this component of their business, that they were a small group of volunteers, or that they were in the process of developing a plan.

B Organisation Employment/Volunteer Structure

B1. Please indicate the number of employees/volunteers directly involved in the last year with the administration and/or provision of Outdoor Recreation in your organisation.



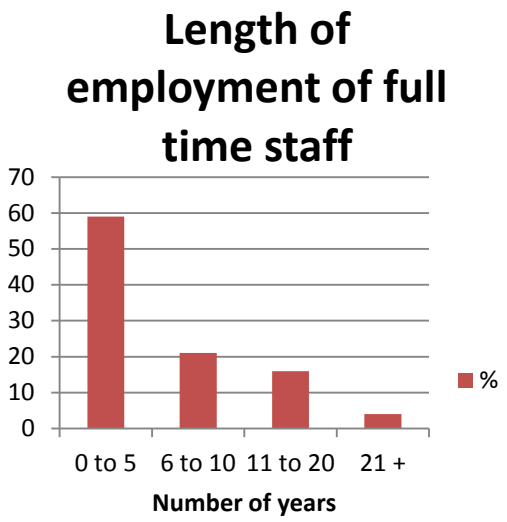
- Full time – 35% of respondents indicated they had 1-2 full time staff, with a further 21% having 3-5 full time staff. 17% of respondents indicated they had 10 or more staff in this capacity, with a further 16% having no full time staff.
- Part time – 41% said they had no part time staff and 30% had 1-2 part time staff
- Casuals – 30% had no casual staff, while 21% had either 3-5 or 10 or more casual staff
- Volunteers –42% of responding organisations have 10 or more volunteers
- Contractors – 38% of respondents had no contractors in their organisation, while 24% had 3-5 contractors

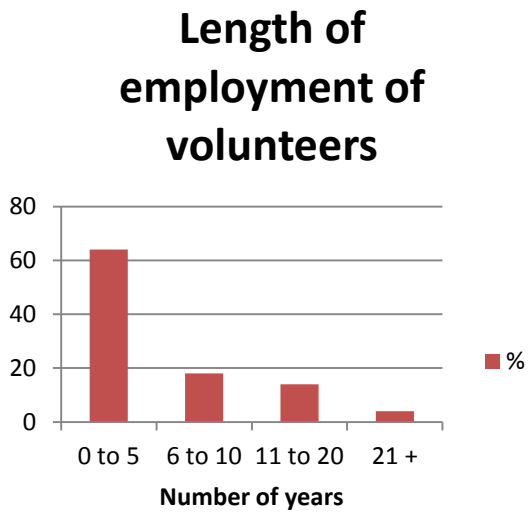
B2. Estimate the percentage of your annual recreation related workload that would be completed by each of the five employment categories

- The majority of respondents (29%) indicated that full time staff completed 61-80% of their organisations workload. More than 51% of respondents noted that full time staff did between 61 and 100% of required work.
- 45% of respondents indicated that volunteers completed 81-100% of their workload.
- The majority of respondents indicated that part time, casual staff and contractors completed the least of their workload (0-20%).

B3. Estimate, in years, the average length of employment for each classification within your organisation

- The majority of organisations (59%) noted that full time staff would remain with a company for 1-5 years, 21 % for 6 to 10 years and 16% for 11 to 20 years;
- Part time staff tend to be employed with an organisation for a lesser period, with 89% of respondents explaining that part-time staff stay for 0-5 years;
- 64% of respondents indicated that volunteers stay for 0-5 years, although 18% commit to an organisation from between 6 and 10 years.





B4. What are the commonly stated reasons for departure when outdoor recreation staff or volunteers have left your organisation?

There was no single reason that stood out as why people left the outdoor field, however there were consistent responses for a number of reasons proposed. For example, the most common responses for why people leave the sector were:

- ‘Relocating to another area’ (31%),
- ‘Retirement’ (28%),
- ‘Career change’ (27%),
- ‘Career progression’ (22%),
- ‘Stress/burnout/fatigue’ (22%) and
- ‘Family reasons’ (21%).

The least commonly reported response was ‘Expired qualifications’ (3%).

Understandably, some organisations also pointed out that junior volunteers leave a role as they move onto university or into the paid workforce.

C Ownership

C1. Which of the following best describes the ownership structure of your organisation?

34% identified their organisation as an Independent not for profit entity
25% Commercial enterprise/Sole Trader/Listed Company
15% were Government Agencies or Public Sector
10% were Private/ Independent Schools
10% indicated they were members of larger not for profit groups (such as Churches)

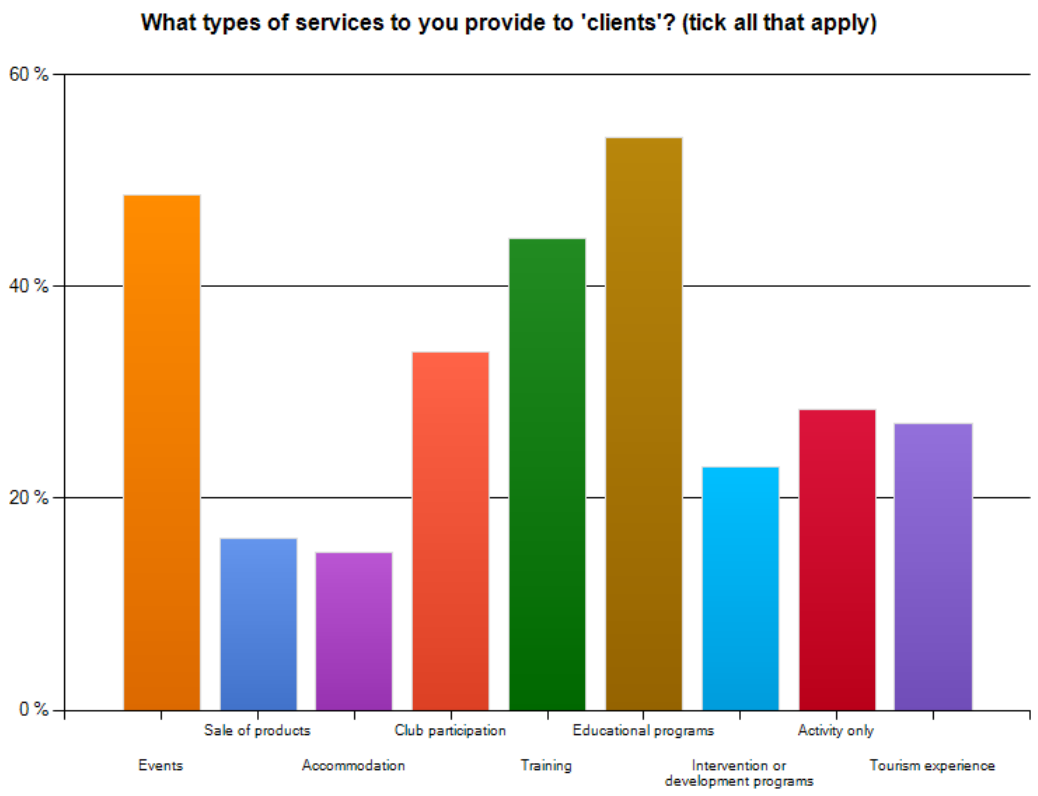
C2. What types of services do you provide to clients?

Organisations provide a range of services to their clients. Most common services provided by organisations included:

- educational programs (54%),
- delivery of Events (48%), and
- provision of Training (44%).

Less common, but also identified as services to the sector, were

- Club participation(33%),
- Activity only (28%),
- Tourism experience/s (27%),
- Intervention for development programs (23%),
- Sales of products (16%), and
- Accommodation (15%).



C3. On average, how many people would you provide a service or outdoor experience to in a year?

These results were collated as an average reply and as a total number, across a range of common services in the outdoor sector. Though only 67 organisations (55%) completely answered this question, the findings indicate that the respondents deliver services to a millions of people, predominantly through tourism, events and education.

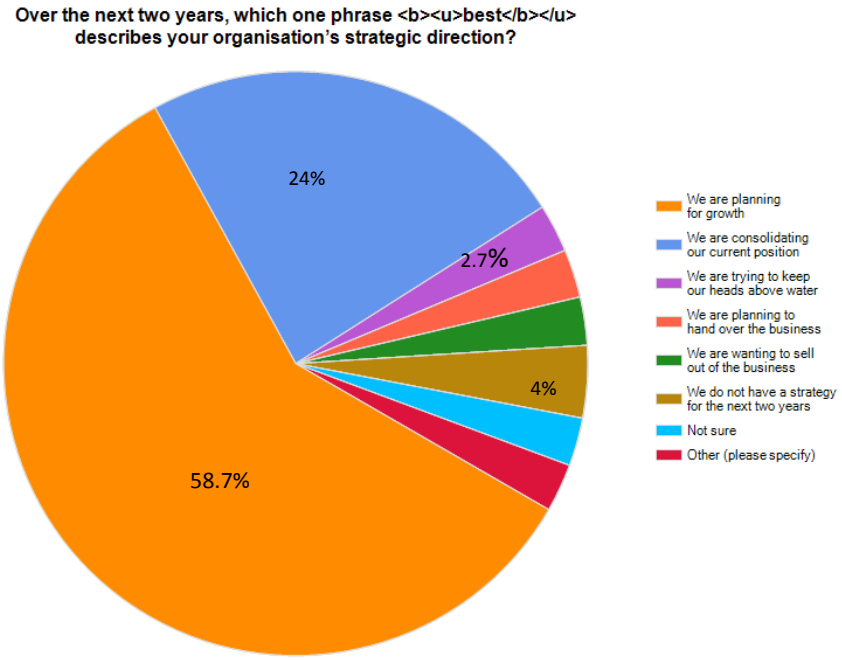
Service	# of responses	Response Average	Response Total
Events	33	6,755	222,942
Activity Program – Education	31	2,283	70,801
Activity Program – Recreation	29	1,083	31,426
Activity Program – Intervention/ Development	15	985	14,785
Sale of Goods	14	220	3,088
Club/ Group Recreation	23	2,269	52,198
Training	34	439	14,935
Accommodation	11	4,005	44,056
Tourism Experiences	20	73,970	1,479,405
	Total	**583,338**	**3,500,032**

D Organisation Status

D1. Over the next two years, which one phrase best describes your organisations strategic direction?

The majority of respondents are planning for growth in the next two years (58.7%), with an additional 24% consolidating their current position. 4% of respondents do not have a strategy for the next two years, with the remaining respondents equally indicating they will be:

- Trying to keep their heads above water;
- Planning to hand over their business;
- Wanting to sell out of their business;
- Unsure of their strategic direction; or
- Looking to retire or reduce their workload (other).



D2. Do you consider there to be impediments to growth in your organisation?

More than 77% of respondents believe there are impediments to their growth as an organisation. Impediments were rated on a scale of issues from High Impact through to Low Impact or Not Applicable with the following results:

High Impact

- Retaining quality staff/ volunteers – 35.8%
- Increases in costs (e.g. transport, permits, insurance) – 30.4%
- Availability and access to suitable sites – 29%
- Lack of time – 28.8%

Medium Impact

- Availability and access to suitable sites – 39.1%
- Lack of time to work ON the business rather than IN the business – 35.5%
- Lack of government funding – 34.3%
- Increases in costs – 33.3%
- Lack of time – 33.3%

- Tied down in legislation and regulations – 32.3%
- Lack of funds – 29.9%
- Lack of suitable staff/ volunteers – 29.2%

Low Impact

- Willingness of staff to attend training – 54.8%
- Lack of business/ marketing skills/ knowledge – 45.3%
- Tied down in legislation/ regulations – 44.6%
- Availability of suitable business skills training – 42.6%
- Lack of suitable mentor/ business advisor – 41.3%

As can be seen there are consistent issues that impact on organisations capacity to grow, particularly focused on costs, staffing, time and access to suitable venues.

E Activities

E1. What outdoor/adventure activities does your organisation offer as part of its "core business"?

Though not an exhaustive list, the following represent the most popular responses for activities delivered through respondents business programs:

- **Bushwalking – 45.5%**
- **Camping – 42.9%**
- Canoeing – 32.5%
- Team Building/ Initiatives – 29.9%
- Abseiling – 27.3%
- Ropes Course – High/ Low – 26%
- Climbing – 20.8%
- Adventure/ Challenge Course – 20.8%
- Orienteering – 16.9%
- Rockclimbing – 15.6%
- Cycling – 15.6%
- Kayaking (Flat water/white water) – 15.6%
- First Aid – 14.9%
- Mountain Bike Riding – 11.7%
- Nature Studies – 11.7%
- Birdwatching – 11.7%
- Four Wheel Driving – 10.4%
- Surfing – 10.4%

E2. Clientele

Type: Respondents were asked to indicate the proportions of listed groups that made up their clientele. The results reflect the most popular responses and indications of how exclusive each client group is:

- General Public including tourists (66.7%) made up between 5 and 100% of clients, with a heavy emphasis on this group comprising 80 -100% of client group.
- School/ Education Groups were a consistently identified client segment (61.7%)
- Community Groups (38.3%)
- Corporate Groups (31.7%)
- Special Needs (26.7%)
- At risk clients (23.3%)

- Religious/ Church Groups (16.7%)
- Other (8.3%) – some people indicated that their members comprised 100% of their clients, while others noted that groups other than those listed contributed some clients to their organisations.

Locations: Most organisation indicated that at least some of their client groups came from the 'local' area (within 200km radius); with the remaining clients predominantly coming from the 'rest of Queensland'. Interstate and international clients were identified by 26 respondents, with 3 organisations indicating that international clients made up at least half their clientele.

Age: The most commonly identified group of clients were 13-18 years of age (44 responses); followed by 26-45 year olds (41 responses). These figures do not indicate that these groups were the predominant client for these organisations; rather that they were the most common age groups found to make up at least part of the client base for more organisations.

For every age grouping, there was at least one organisation that identified at least 50% of their clients came from that age grouping (e.g. one organisation noted 80% of their clients were 66+).

E3. Land Use
The largest number of respondents indicated they used **at least some public land** for the delivery of their services, with more than half of the 47 responses showing they relied on public land for at least 50% of their access. In the main National Parks and State Forests were most heavily used public lands, followed by 'reserves', 'conservation parks' and 'roads'. Forest Reserves and other areas such as beaches and climbing cliffs were also identified as public lands that were used.

Forty two respondents indicated they used **private land**, some for 100% of their program delivery and half for at least 50% of their land access.

Rivers and dams (25 responses) and **estuary/seas** (19) were also identified as sites used for outdoor programs and activities.

F Organisation Training/Education Information

F1. Professional Development
82.8% of respondents indicated they do provide **formal training or professional development** for their staff/ volunteers/ committee.

Those that do not identified that they variously:
- Already employ qualified staff or contractors
- Lack time for training
- Find training too expensive or
- Lack access to quality training.

Organisations who do not offer training were very small in number therefore the reasons for not providing were almost as diverse as the number of respondents.

F2. *The **National Outdoor Recreation Industry Training Package** is a set of nationally endorsed standards & qualifications for recognising and assessing the skills of people in the outdoor recreation industry. Do you use the qualifications and competencies within the Outdoor Recreation Training Package for any of the following uses:*

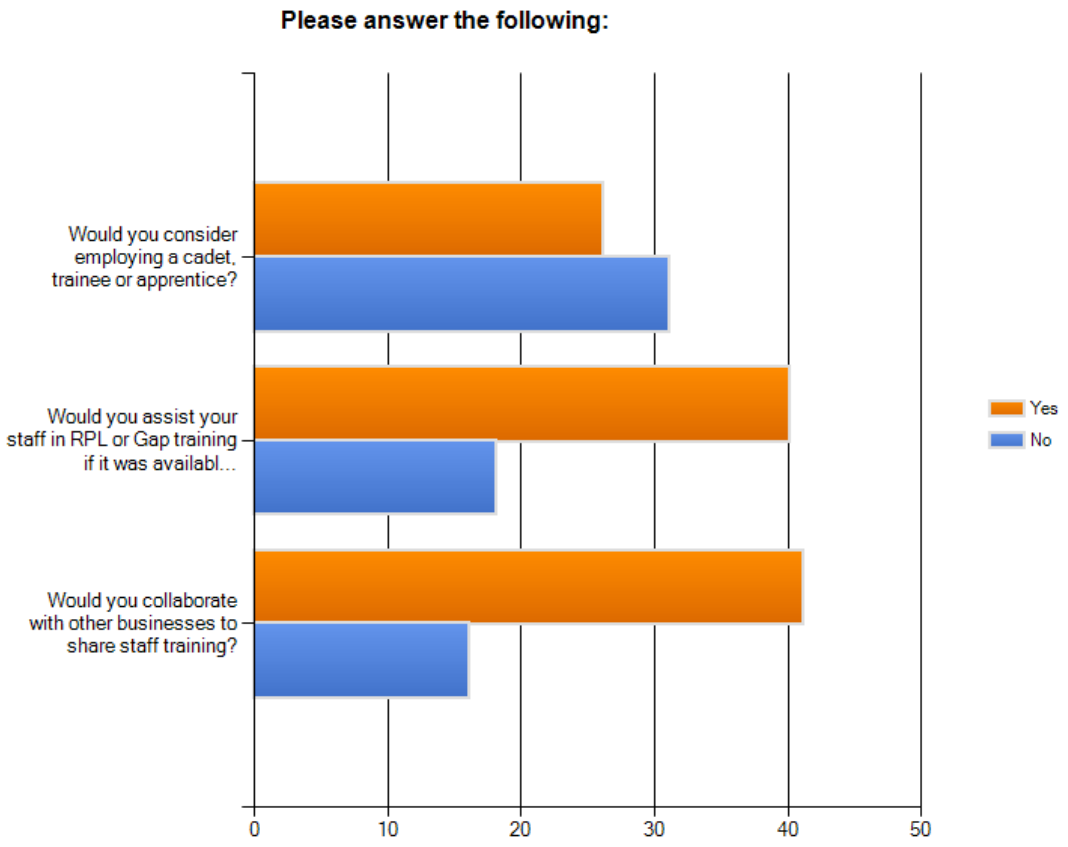
In the main the sector use NOLRS as a guide to professional development needs (46.4%). They do not use NOLRS as the basis for job descriptions or performance reviews; to determine salary; or as a benchmark for employment.

F3. Employment

To assist in understanding the sector's interest in existing training opportunities three key questions were asked, namely:

1. Would you consider employing a cadet, trainee or apprentice?
2. Would you assist your staff in RPL or Gap training if it was available and affordable?
3. Would you collaborate with other businesses to share staff training?

The results revealed people were interested in collaboration and assisting staff with RPL or Gap Training, in particular (see chart below).



F4. Skill Shortages

Questions were also asked about staff skill shortages. These were found most commonly to lie with:

- Outdoor recreation activity skills (54%)
- Risk Management (48%)
- Current legislation/ Standards (46%)
- Activity and Program Management (45.1%)
- Marketing (43.1%)
- Business Development/ Planning (43.1%)
- Governance (40.8%)

There was no consistency regarding how training in these areas could best be achieved, although 32% indicated that outdoor recreation activity skills were best delivered through **face to face training**. Risk Management and Activity & Program Development had at least a quarter of respondents suggesting that **self-paced online learning** could be appropriate.

G Standards

G1. Adventure Activity Standards (AAS)

65.5% of respondents are aware of the development of the AAS. Twenty six people indicated how they used these documents in their workplace/s indicating they were used:

- As a training tool
- As a reference tool
- As a guide for development of policies and procedures/ codes of practice
- They are incorporated into risk assessments and SOP's
- For planning and risk management
- As a minimum guide
- As the basis for planning and running activities

G2. Safety Standards

- 83.5% of respondents indicated they have documented and reviewed safety standards for their organisation/ activities.
- 93% maintain internal records of accidents and incidents
- 17% record these with their organisation/ peak body
- One organisation indicated they did not record accident/ incident data
- Annual reviews were most commonly reported methods for reviewing evaluating accident/ incident data; followed by Revision of SOP's/ RAM's
- Twenty one organisations indicated they reviewed their accident/ incident data at least monthly
- An additional 10 respondents noted they reviewed this data after each accident/ incident or after any event that was run

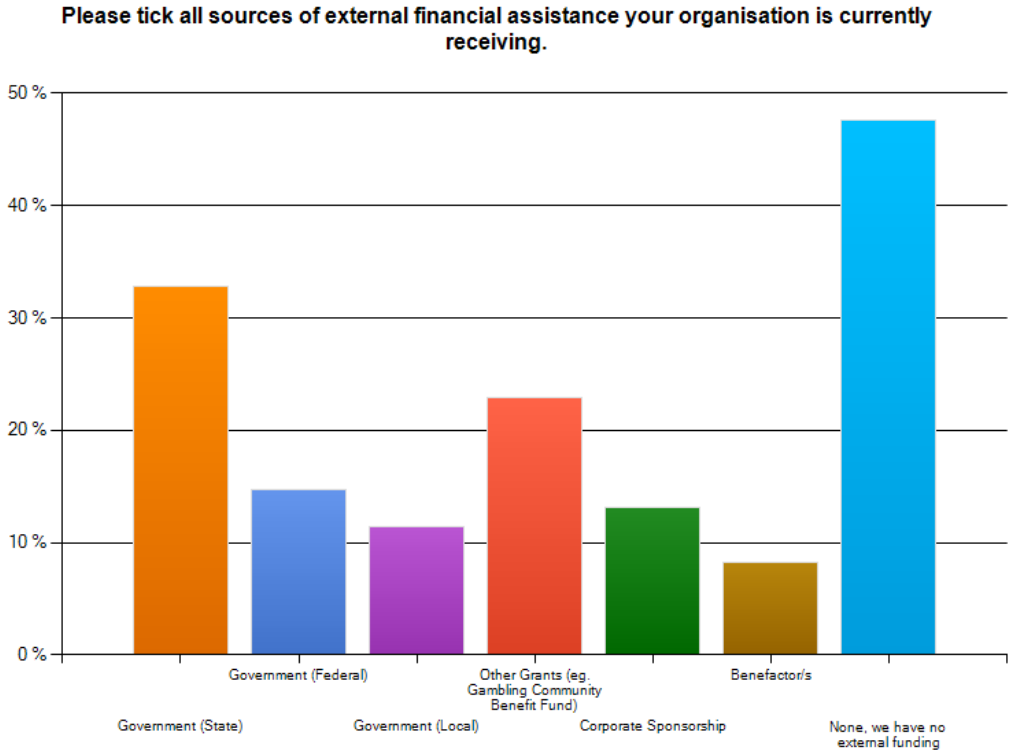
H Funding/Sponsorship

H1. External financial assistance

47.5% of respondents receive no external funding. Of the organisations that did receive financial assistance, funding sources included:

- State Government 32.8%
- Other grants (e.g. Gambling Community Benefit Fund) 23%
- Federal Government 14.8%
- Corporate sponsorship 13.1%
- Local Government 11.5%
- Benefactors 8.2%

(See table below)



H2. What percentage of your income does each funding source provide?

For those that did receive external funding, State Government provided the highest percentage (50%) of income. The second highest percentage of income was from 'Other' sources, which included private clients, association prizes and awards, organisation members and schools.

What % of your total income does each funding source provide?	
Answer Options	**Response Percent**
Government (State)	50.0%
Government (Federal)	21.4%
Government (Local)	26.2%
Other Grants (e.g. Gambling Community Benefit Fund)	38.1%
Corporate Sponsorship	21.4%
Benefactor/s	11.9%
Other	42.9%

H3. How would you describe your experience of applying for external funding?

30.5% of respondents to this question indicated their experience of applying for funding had been a positive one, with comments including the following:

- Moderately difficult but successful

- Fair and accessible
- Fair but tricky
- Relatively straightforward
- Easy and successful
- Moderately easy to comply, return is small but valuable
- Successful but timing of funding programs is an issue to work with Council budget & timeframes

Meanwhile, 69.5% suggested their funding application experience had been more difficult, with comments including:

- Very difficult, have looked into the process but found it too hard with limited support
- Time consuming with no guarantee of success
- Difficult in all aspects
- Difficult to find funding relevant to our organisation
- Inaccurate guidelines
- Not successful and difficult to do for State funding
- Time consuming and at times frustrating. Seems like hoop jumping with applications focussed on the wrong agenda for our sector
- Funding seems to go to larger organisations all the time with small business missing out

H4. Turnover

Participants were asked to indicate their organisations gross turnover for the most recent financial year. Reponses demonstrate that the most common response (44.8%) indicating outdoor organisations turnover between 0 and $100,000 per annum, although the next most common turnover at 15.5% was in excess of $2 million annually:

- 27.6% - $0 - $50,000
- 17.2% - $50,001 - $100,000
- 15.5% - Greater than $2 million
- 8.6% - $200,001 - $300,000
- 6.9% - $100,001 - $200,000
- 6.9% - Between $1 million and $2 million
- 5.2% - $400,001 - $ 500,000
- 3.4% - $300,001 - $400,000

I Products and Services Requirements

Which of the following types of services might your organisation be interested in?
The highest percentage response for each service asked can be seen below.

- Regional Networking Opportunities 46.6% said Interested
- Development of Operational Plans/Strategic Plans 43.9% said Interested
- Insurance information 42.4% said Interested
- Marketing & Promotion of Organisation 42.4% said Interested
- Assistance with Staff Training 35.7% said Interested
- Activity Skills Training 31.6% said Interested
- Event Management 31.6% said Interested

4.0 A National Survey

In addition to the Queensland Outdoor Sector Survey, QORF played a lead role in the development of a national survey of the outdoor sector (2010) to begin to build a picture of the qualifications and skill needs for our paid and unpaid workforce. The need for a national survey becomes evident when the outdoor industry is discussed. In Australia, workforce participation is reported based on numbers of paid employees and the Australian Bureau of Statistics (ABS) do not yet produce total labour force figures that simultaneously account for paid workers, unpaid volunteers and those who participate as both a paid worker and unpaid volunteer.

At present, the ABS data on volunteering is collected through two avenues – one question in the census which occurs every five years; as well as a set of questions in their General Social Survey (which occurs every five or six years). Meanwhile figures on paid workers per industry are gathered from the Labour Force Survey component of the Monthly Population Survey (ABS 2010). Subsequently, due to the differing collection methodologies, these two sets of data cannot be cross pollinated to produce

a) statistics that reflect the proportion of a given industry's workforce occupied by unpaid (volunteer) workers, or
b) identify the outdoor recreation component of any data, as this sector is seen to be a small part of a wider sport, fitness and recreation industry.

To redress some of these concerns, the Outdoor Council of Australia negotiated with Service Skills Australia to conduct a national survey seeking to define the sectors size, range of services and qualification profile to inform workforce development and begin to quantify involvement in the outdoor sector. As with any survey, this process was problematic as there remain gaps in our shared understandings of the outdoor sector, our desire to capture complexity of data in a survey, and our capacity to communicate simply.

The National Survey was disseminated through state and national organisations in the outdoor sector to try and capture a breadth of responses. This survey was particularly targeted to 'peak' body organisations rather than individual clubs, with, for example Scouts Australia asked to respond for Scouting throughout the country, rather than seeking State based, or Den based responses.

The results of the national survey are exploratory and not representative but they do indicate two things:

1. Queensland organisations did respond, providing 25.8% of national responses;
2. The Queensland findings from the National Survey, support and reinforce the state based results from the Queensland Survey.

325 national responses were received, with 84 of those coming from Queensland.

In brief, the Queensland responses to the national survey revealed:

- Majority of responses came from non-school, non-RTO's (72.6%), followed by Not-for-profits (39.3%) and Commercial enterprises (38.1%)

- The main activities organisations identified that they delivered as services were:
    - Camping (66.2%)
    - Bushwalking (62.2%)
    - Team-building (55.4%)
    - Canoeing (52.7%)

- There was an apparent emphasis on a full time workforce, however where there are volunteers, there are comparatively more volunteers that paid workers.

- The median tenure for workers are:
    - Volunteers 3.0 years
    - Part time 4.5 years
    - Full time 5.0 years

- In Queensland the qualifications profile of staff tends to be skewed towards people with Degrees, Certificate IV's and Diplomas. These qualifications vary although again the preponderance lies with qualifications in Outdoor Recreation, Education and Outdoor Education. (This result is common throughout the country with Bachelor Degrees and Certificate III and IV being evident).

- 90% of respondents provide access for formal training for the paid workers.

- The majority of respondents are anticipating progressive growth in workers over the coming 5 years.

- The majority of organisations receive no government funding (64.6%).

5.0 Summary

The results of both these surveys, combined with findings from the 2006 and 2008 Outdoor Industry Surveys consolidate understandings that we hold for the outdoor sector, including:

Workforce

- Staff work for organisations for a limited time frame
- Outdoor organisations struggle with retaining quality staff
- Training and professional development are part of the culture of outdoor providers
- Volunteers continue to contribute substantially to the workforce of the outdoor sector

Organisations

- Nearly half of all outdoor providers who responded do not receive any external funding
- Survey respondents are predominantly micro businesses
- Nearly 60% of outdoor organisations are planning for growth in the next two years

- Education, Events and Training services are most commonly reported services provided by the sector

Access

- Access to suitable and sufficient land and water remain a high impact concern for many outdoor providers
- Increasing costs (for permits, insurance and transport) are ongoing issues
- Public land including National Parks and State Reserves are the most used environments for outdoor activities, followed by private land, rivers/ dams and estuary/ seas