Outdoors Queensland's

Queensland Outdoor Census 2023

Outdoors Queensland

Live life outdoors

Queensland Outdoor Census 2023

September 2023

Author

Donna Little

Way To Be – waytobe.com.au

Acknowledgements

The authors and owners of the report would like to acknowledge the Traditional Owners and Custodians of the lands and waters upon which outdoor activities, programs and services are conducted in Australia; and we pay our respects to Elders past, present and emerging.

Consultations & Support

We are grateful to all who contributed and provided input and support to this project. Consultation was undertaken with a range of stakeholders to identify how to best shape, implement and distribute the Census including:

- Outdoors Queensland Board of Directors;
- Representatives from the Queensland Government Department of Tourism, Innovation and Sport (DTIS);
- Representatives of other Australian Outdoor Peak Bodies (e.g., Outdoor Council of Australia, Outdoors Vic, Outdoors NSW, Outdoors WA);
- Census Reference Group: *Murray Stewart (Director OQ), Esther Anderson (Snr Researcher QTIC), Kim Harrington (CEO Guides Qld), Jo O'Neill (Manager DTIS), Dom Courtney (EO OQ)*;
- Census distribution networks including: Qld Regional Tourism Organisations/ Destination Management Organisations, Local Government Authorities (LGA's), Regional Sport and Recreation Officers, QTIC.

Supplementary Document

A supplementary Methods and Census Guideline document sits alongside this report, to enable Outdoors Queensland to repeat the survey protocols in future iterations.

Project Funding

The project was funded through the Industry Peak Body Funding Agreement 2022-2023, part of the Active Industry Fund administered by the Queensland Government Department of Tourism, Innovation and Sport. Outdoors Queensland thank them for their support and guidance.

Glossary

Organisations

DTIS – Department of Tourism, Innovation and Sport

DMO – Destination Management/ Marketing Organisation

LGA – Local Government Authority

NFP – Not for Profit

NRO – National Recreation Organisation

NSO - National Sport Organisation

OQ – Outdoors Queensland Ltd

QTIC – Queensland Tourism Industry Council

SRO – State Recreation Organisation

SSO – State Sport Organisation

Regions

CQ – Central Queensland

DD/SW – Darling Downs/ South-West

FNQ – Far North Queensland

NQ – North Queensland

SEQ – South-East Queensland

WBB – Wide Bay Burnett

Executive Summary

This project seeks to identify and build understanding of organisations who comprise the Outdoor sector in Queensland. Designed for Outdoors Queensland (OQ) and funded by the Queensland Government Department of Tourism, Innovation and Sport (DTIS), this report summarises insights into the organisational types, participants and activities of outdoor focused organisations operating in the state of Queensland in 2023.

The findings illustrate broad insights from:

- 981 organisations that form the Outdoors Queensland Contact List; AND
- 324 unique organisations who completed the Census.

Key Finding

Outdoor organisations provide services to at least 991,791[1] Queensland participants or clients in an average month.

Contact List Snapshot

52% of outdoor organisations are based in South-East Queensland but service delivery is more dispersed. Organisations base of operations does not necessarily define area of service.

Just over a third of organisations have an element of Tourism (35%) with Outdoor Recreation (18%) the next most identified organisation type.

Most typical outdoor activities delivered are paddling, bushwalking/ hiking, initiatives, cultural/ heritage/ environmental interpretation and nature play.

Census Survey Snapshot

Outdoor organisations work with an average of 1011 participants or clients each month.

Nearly 300,000 participants or clients access outdoor services every month from the responding organisations.

The most reported outdoor services are Education in or through the outdoors; Recreational Experiences, and Sport/ Recreation Competitions or Events.

[1] This figure is an extrapolation of the Mean response to average number of monthly participant/ clients (1011) to the Outdoor Queensland Census Contact List (n=981).

The most frequently reported critical client types are recreational clients or members.

52% of Census organisations are based in Regional or Rural locations.

Fee for service or sales (50%) and Member Fees (27%) are the main sources of reported income.

Volunteers represent 59% of all identified workers.

Of paid workers, only 39% are employed on a Full-Time basis.

This inception project confirms the Queensland Outdoor Sector is diverse and multi-faceted in what it is doing, and where it is delivered. For example, diversity is seen in the range of activities, organisational types, structures, locations, clients/ participants serviced and in the size of the organisations involved. In brief, the project findings illustrate that the outdoor sector in Queensland:

- is characterised by large and small businesses;
- is strongly enabled by volunteers, yet supported by a dominantly part-time paid workforce;
- is accessible and embedded in communities in regional/ rural, urban and remote areas;
- services recreational, educational, therapeutic, developmental and tourism purposes; and
- supports people individually and collectively participating in outdoor activities and spaces as well as contributing to protecting and managing nature-based settings.

The outdoor sector includes those who are direct providers with activity participants, as well as people and organisations who a) **build** the sector's capacity to perform, b) **plan, manage and support** access and c) **enable** safe practices in the outdoors.

While the Outdoor Sector itself directly delivers, facilitates, and supports opportunities in the outdoors, its impacts spread wider. Evident from this project, the sector is permeated with aligned sub-sectors including,

tourism, recreation, schools and education, sports, events, local government, allied health, volunteerism, culture and heritage, state government agencies and land managers.

This report reminds us that while the breadth and complexity of the outdoor organisations in Queensland may still be emerging, the outdoor sector can:

i. benefit from embracing a singular, collective identity, and
ii. be celebrated for its contributions and importance across the breadth of community and other industries.

Foreword

Outdoors Queensland's tagline is "Live Life Outdoors".

Living life outdoors in Queensland allows volunteers to contribute to their communities, offers a fulfilling workplace for life, and provides a fun break from work and other responsibilities.

Although we recognise outdoor activities as part of our way of life, the scope and scale of the outdoor sector in Queensland (and Australia) has not been well-measured or fully appreciated.

Since the formation of QORF in 1996, our organisation has represented Queensland's outdoor organisations. We have always known that outdoor providers are spread across the State, delivering various activities in so many wonderful places, but we couldn't say how many organisations did what, with whom.

This first Queensland Outdoor Census has produced numbers to demonstrate what the outdoor sector does, where it does it, and how many people are involved. This report presents some truly impressive findings.

Some insights produced by this project will stand out for everyone. For example, in an average month, Queensland outdoor organisations collectively provide services to at least one million participants/ clients. At least a million people every month living life outdoors thanks to Queensland outdoor organisations – wow!

We find that volunteers represent 59% of the Queensland outdoor workforce. This can be an indicator of a strength of the outdoors - people are willing to work in the outdoors without being paid - and a challenge - our unpaid outdoor workforce may be taken for granted if we don't appreciate the value and importance of volunteers.

Some statistics may be of particular interest to parts of the sector – that is to be expected when the outdoor sector is so broad and offers its wares in different ways. This report's findings can be used to enhance our understanding and appreciation of the outdoor sector, to inspire discussion, and to drive insight into how the outdoor sector adapts and serves our communities.

This project presents a snapshot of the Queensland outdoor sector at a point in time. The intent is to replicate this process regularly and build information on trends and changes over the years. The methodology used will be shared with other jurisdictions, to enable a national analysis.

Outdoors Queensland thanks all involved in this first iteration of this project:

- Survey respondents provided information and gave valuable time to this project.
- The Queensland Government provided funding to Outdoors Queensland via an Industry Peak Body Funding Agreement as part of the Active Industry Fund.
- The Project Reference Group gave invaluable advice and expertise.
- Way To Be Consulting developed methodology, refined processes, analysed results, and created reports.
- Outdoors Queensland board and staff provided oversight, expertise, and hard work.

Outdoors Queensland will continue to encourage people to live life outdoors because our vision is a world where outdoor activities are a vital part of healthy lives. We would love outdoors people to consider this report – when you do that, please share what you learn, challenge what concerns you, and engage with us for the good of the Queensland outdoor sector.

Yours sincerely,

Dom Courtney
Executive Officer, Outdoors Queensland

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Project Rationale

The ability of the outdoor sector in Australia to clearly identify, engage and describe its collective contributors is unrefined. While state based peak bodies like Outdoors Queensland have a membership base and contact list of people who receive regular news and sector updates, rarely have the diverse organisations that comprise the sector been the focus of a comprehensive effort of detection and intentional engagement.

The Queensland Outdoor Census project was designed to identify and quantify the multi-faceted outdoor organisations operating in Queensland. The goal was to find and capture current information about the mix of organisations operating in the state and use that data to:

a) identify the breadth of the sector,
b) enhance awareness and understanding of the size and scope of the sector, and
c) build connections for the sharing of information, opportunities, trends, and challenges.

About the Census

In July 2023 Outdoors Queensland (OQ) conducted an online survey of organisations that promote, facilitate, or support outdoor participation in Queensland. The purpose was to initiate a targeted approach to identifying the mix of the outdoor sector in Queensland.

For the purposes of the census, the outdoor sector was broadly defined to include all:

- direct service providers of outdoor - activities, learning, interventions, and experiences,
- land and water or facility managers of places where outdoor pursuits take place,
- relevant education and training organisations, and
- sector support organisations (e.g. consultants, aligned peak associations, event organisers, safety/ rescue organisations, outdoor equipment retailers, conservation groups, etc).

The census sought to capture insights from all regions of Queensland, as well as across the known range of outdoor delivery modes and approaches including outdoor/ environmental/ adventure based: recreation, education, tourism and therapy.

OQ intend to repeat the census every four years until 2035, to:

- consolidate and promote the value of information to guide decision-making;
- enhance understanding of the number, type and diversity of organisations actively contributing to the outdoor sector;
- monitor and understand changes over time.

Reaching Likely Organisations

From March – June 2023 OQ built a Census Contact List from its existing organisational contacts (e.g., OQ members, general mailing list, Nature Play Qld contact list and other internal project contact lists). This was expanded through: i) a Web Scrape of outdoor organisations based in Queensland, and ii) a systematic online Manual Search (*refer to separate Methods Guideline for detailed information*).

An online census (short survey) was sent to all outdoor organisations identified on OQ's Census Contact List and distributed with the support of partner organisations (Refer Appendix 2).

Census Project Limitations

Contact List

A key limitation in understanding the outdoor sector in Queensland is the lack of an established, tested, and complete list of outdoor organisations operating in the state. The reasons for this are varied but include:

- the disparate nature of outcomes, clients and activities provided by outdoor organisations;
- the lack of any singular definition of the outdoor sector;
- a splintering of the sector by service type with each protecting their differences and unique qualities (e.g., recreation, education, therapy, tourism);
- the variety of type and management of the spaces, places and infrastructure of the outdoor sector;
- the multiple support and associated services that enable or facilitate outdoor engagements are often not recognised for the roles they play (inc. policy makers, workforce training organisations, community-based youth development organisations, specialised gear/equipment suppliers, safety managers, and conservation groups etc); and
- the independent nature of both organisations and participants involved in outdoor activities.

Even though Outdoors Queensland (OQ) engage on some level with representatives of each of these stakeholders, they did not have a comprehensive list representing the broader sector in their state. To redress this a strategic and systematic approach to building a current contact list was instigated using publicly accessible data sourced from online searching. This list is not deemed to be complete, but its development was strategic and intentional, aimed at identifying active organisations in each region of Queensland and across the range of Activities and Services, commonly referred to as outdoor related.

While the contact list provides a foundation for reaching out to the broader outdoor organisation community, partners were sought to extend the range of the Census. These included a mix of distribution allies including: QTIC, Regional Tourism Organisations/ DMO's, DTIS and their Regional Sport and Recreation Officers, and Local Government Authorities.

Census

The Census Survey is limited in its function. To mitigate survey fatigue, the census was kept intentionally short (7 minute/ 12 questions). This restricted the range and depth of questions asked.

The questions were designed to be straightforward and not require operationally specific knowledge. Additionally, questions predominantly did not force a single answer, with some allowing the respondent to pick up to three options. This allows for the complexity of outdoor organisations to be acknowledged, but it also removes the capacity for singular identification of, for example, organisation type.

To support census compliance, the questions were framed to seek readily available or easily estimated information, where necessary. Even so, not every response was complete, occasionally reducing the number of valid responses included in the results.

The decisions to prioritise ease of responding had an impact on the depth of analysis possible. For example, respondents could select up to three options to illustrate the type of organisation they represent and their main activities. This means some response totals may not be easily compared because the number of respondents is not consistent. Where relevant, qualifiers are offered in the findings to illustrate potential discrepancies; and at times actual counts are used, not percentages of number of responses.

Section One: Census Contact List

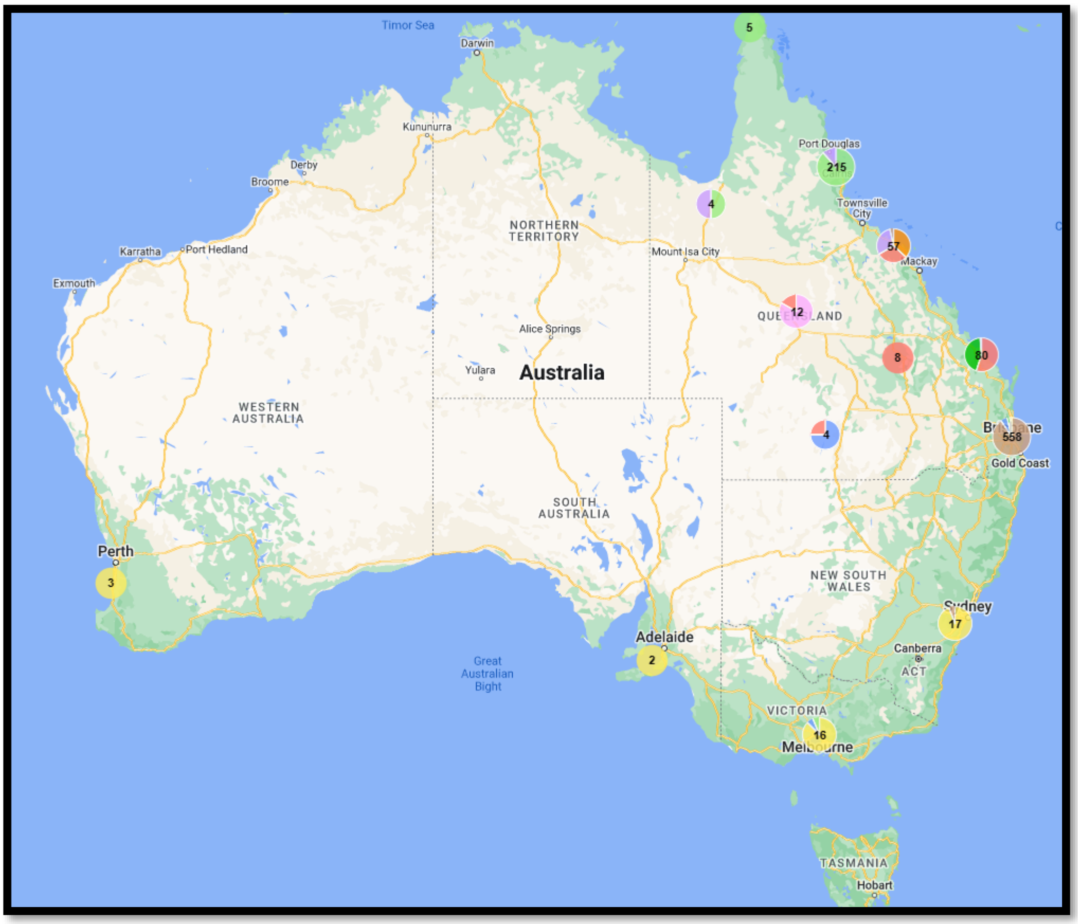
The Foundation of the Sample

Photo: Scott Mayall

A Census Contact List was built from existing Outdoors Queensland contact lists and expanded through a) a webscrape of outdoor organisations operating in Queensland; b) targeted and systematic manual online searches and c) mining existing databases such as NDIS and Queensland Governments' Outdoor and Environmental Education Centres.

After filtering to discard duplications, closed or inactive organisations, or those where no viable contact could be established, the resultant contact list comprised of 981 unique organisations.

Figure 1: 'Heatmap' of Outdoor Organisations operating in Queensland, Census Contact List

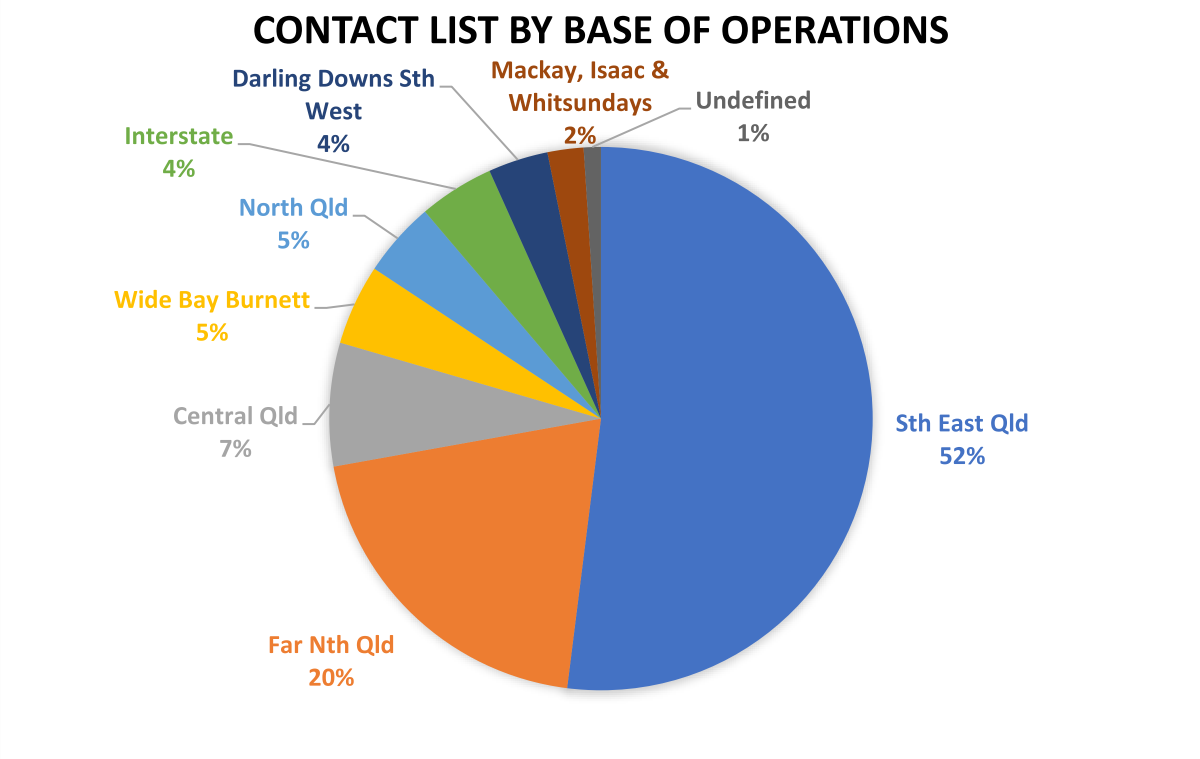


As illustrated in Figure 1, the Contact list includes a majority of organisations located in Queensland (some with multiple sites), as well as some based interstate. These include organisations based in NSW, Victoria, South Australia and Western Australia. Interstate operations represent 4% of the contact list (see Graph 1).

In total, South-East Queensland comprise 52% of contacts; with Far North Queensland (20%) the other substantive region of representation. All other regions individually form less than 10% of current known organisations.

While efforts were made to complete all contact information, 10 organisations (1%) have a base of operations coded as 'undefined'. These are organisations with known areas of operations, but with no clearly discernible physical location.

Graph 1: Contact list organisations Base of Operations



Where these figures show an overall picture, in practical terms the Contact List includes Queensland outdoor organisations who are based:

- as far north as Thursday Island, Cape Tribulation and Port Douglas;
- west into Mount Isa, Longreach, Quilpie and Paroo;
- central in Carnarvon Gorge, Injune, Miles and Bouldercombe; and
- east to K'gari (Fraser Island), Russell Island, Minjerribah (North Stradbroke Island), Cannonvale and Magnetic Island.

There are organisations based on the Atherton Tablelands, both sides of the Great Dividing Range; and along the border with NSW at Killarney, and in the Main Range.

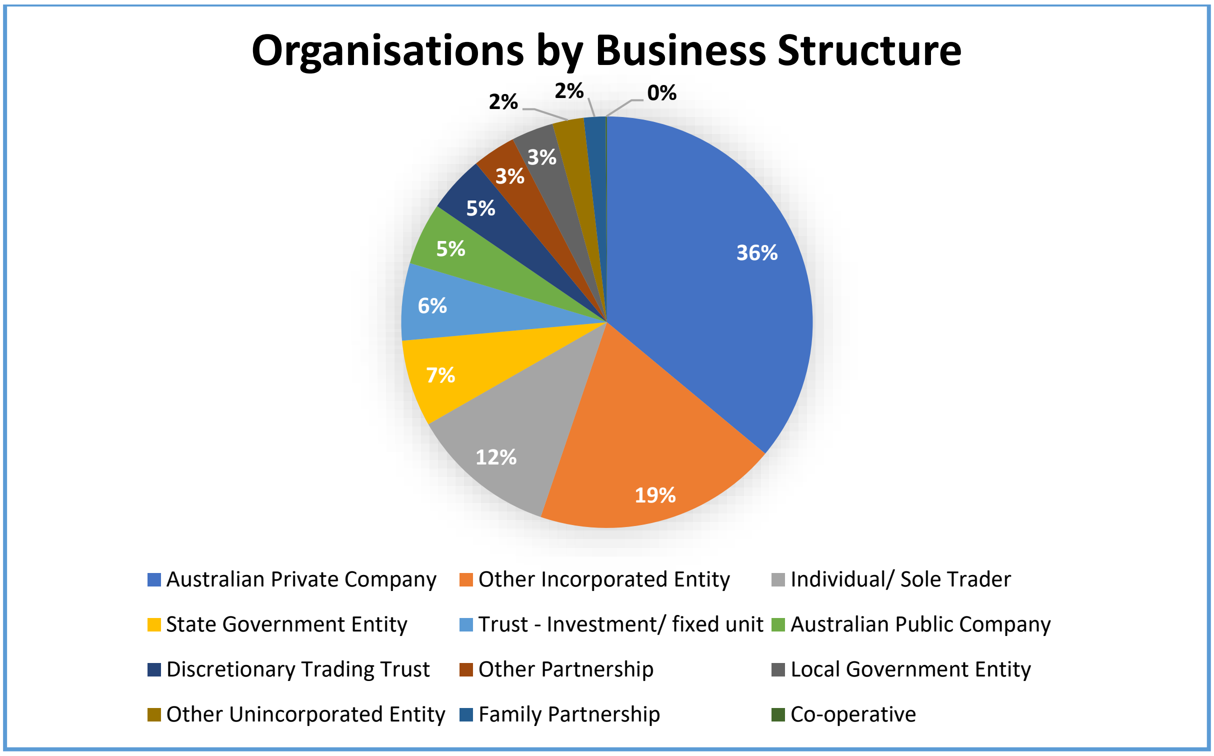
Organisation Business Structure

The outdoor sector is populated by a breadth of organisations with various business and governance structures. As part of confirming whether organisations were active, and to elicit any patterns, an effort was made to determine each organisations business structure. This was identifiable for 89% of organisations. The remainder were unidentifiable due to an inability to determine a business/ rather than trading name; or because some organisations were small enough not to be registered for an ABN.

This exploratory look at business structure revealed a mixture, with 60% being either an Australian Private Company (36%) or Other Incorporated Entity (19%). An additional 12% are designated as Individual or Sole Traders (see Graph 2).

The least commonly identified business structure was a Co-operative with just one (1) organisation registered to this type.

Graph 2: Percentage of Organisations by Business Structure



These findings can be condensed into five (5) main legal constructions namely:

- **Companies**: comprise 63% of organisations when Private and Public Companies, along with Other Incorporated and Unincorporated Entities are combined;
- **Sole Traders**: 11%;
- **Trusts** (including Fixed, Unit and Trading): 11%;
- **State/ Local Entities**: 10%; and
- **Partnerships** (Family and Other): 5%.

The dominance of companies is indicative of organisational structures that create a separate legal entity where company members have limited liability and operations are controlled by directors and owned by shareholders (business.gov.au). The overarching company status applies to Clubs and Associations, Private Schools, as well as Not-for-Profit Community organisations and some commercial operations.

Also notable is the relatively large proportion of organisations identified as sole traders. This business structure was most identified with small tourism operators.

Types of Organisations

The types of organisations captured in the contact list are diverse. Each contact was coded with up to three organisation types to accommodate the range of services and foci of the sector. While most organisations were defined by a singular 'type', many could be defined by 2 or 3 codes, with some combinations proving quite common. These include:

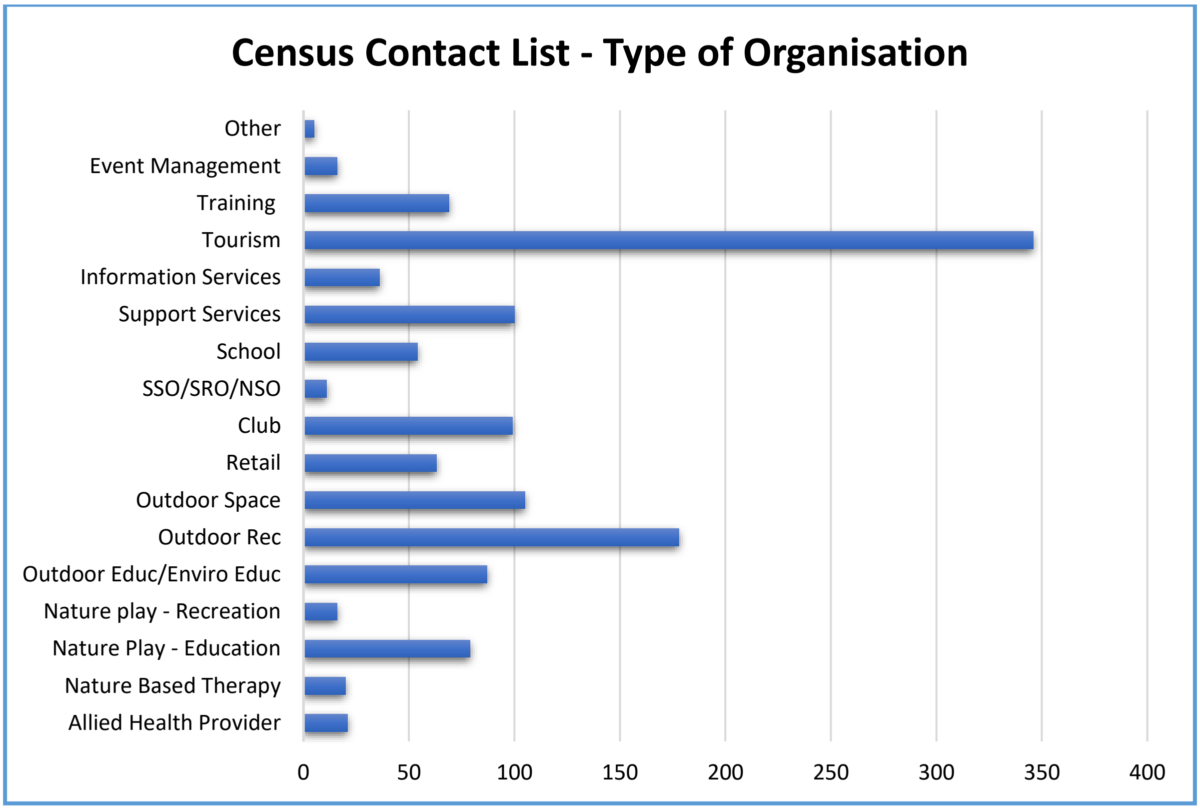
- Nature Play – Education + Nature Play – Recreation
- Outdoor Recreation + Outdoor Space

- Tourism + Outdoor Recreation
- Outdoor Education/ Environmental Education + Outdoor Recreation
- Support Services + Information Services
- Tourism + Training + Outdoor Recreation

The most common type of organisation is Tourism with 35% of all organisations including some tourism component as core or part of their organisation. Outdoor Recreation was the next most common type at 18% (see Graph 3).

Outdoor Space, Club and Support Service were the next most dominant types of organisations, each representing at least 10% of the contact list. Nature Play would reach the same threshold if Nature Play Education and Recreation were combined.

Graph 3: Contact list Types of Organisations



Core Business Activity

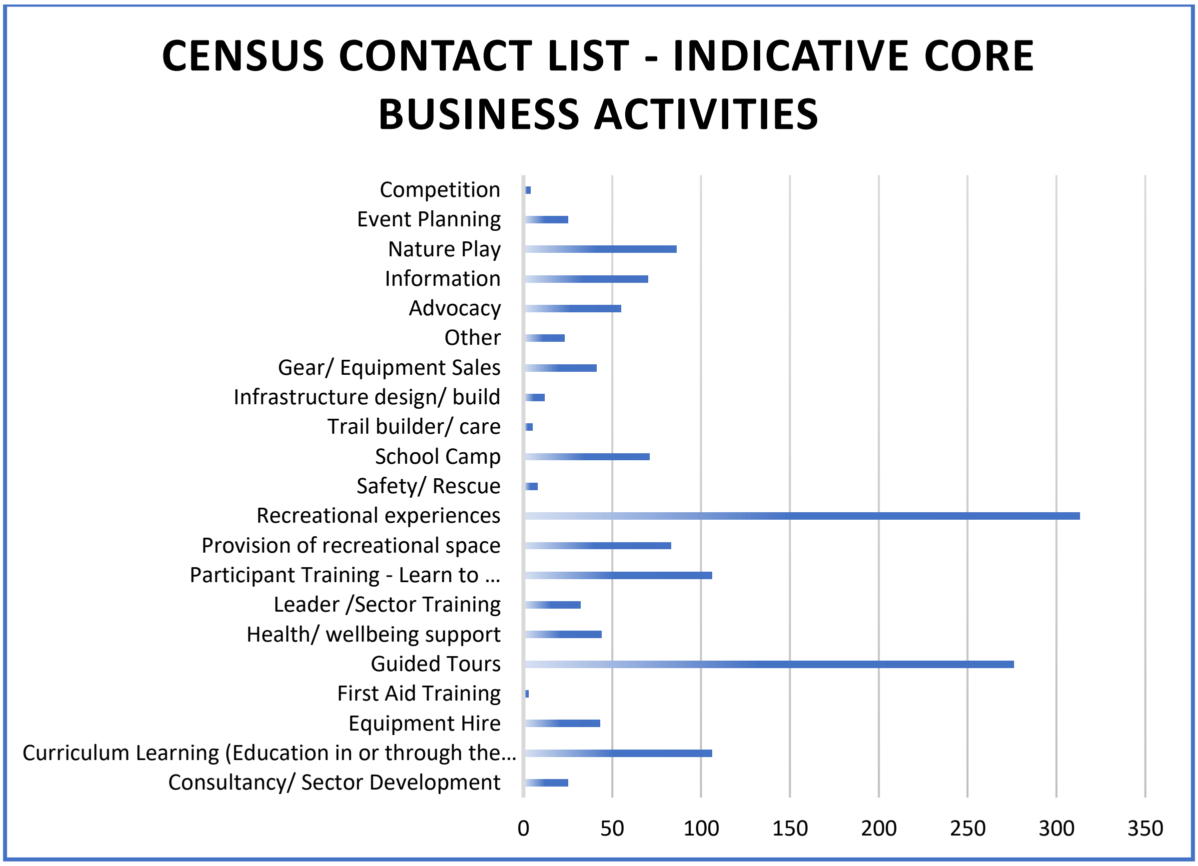
Where 'Organisation Type' represented the main intention of the organisation, 'Business Activity' was designed to capture what organisations are doing. Only two people were involved in coding data to determine the core business activities of each organisation to enable consistency. Again, multiple responses (up to three), were available for each organisation.

Unsurprising given the dominance shown in Organisation Type:

- the Provision of Recreational Experiences (32%) and Guided Tours (28%) are the most common business activities identified; with

- Curriculum Learning and Participant Training (e.g. learn to surf) each accounting for nearly 11% of business activity (see Graph 4).

Graph 4: Indicative Core Business Activities of Contact List Organisations



The least identified core activities to the organisations at less than 1% were First Aid Training, Trail Builders/ Trail Care and Provision of Competition. To qualify this finding, the coders were looking for core business activities – the things that appeared representative of one, or up to three of each organisations most typical actions. Thus, we cannot presume more organisations are not involved in the provision of competition etc, on some level in their business.

More than Just One Thing

*A regional **nature-based accommodation provider** actively attracts and services **domestic travellers** providing a range of cabins and camping sites. It also offers **guided tours** into the surrounding landscape; is well regarded in delivering curriculum-based learning for **school camps**; delivers **interpretive recreational experiences**; and contributes to **land care** and sustainable environmental management.*

Regions of Operations – Delivery of services, activities, experiences

Organisations' region/s of operation were defined to understand the footprint of services. This revealed that most Queensland-located organisations provide service only in their local area, however, 88 organisations (9%) service at least one other region. While multiple areas of service were most common for SEQ organisations, there was also some cross over between North and Far North Queensland.

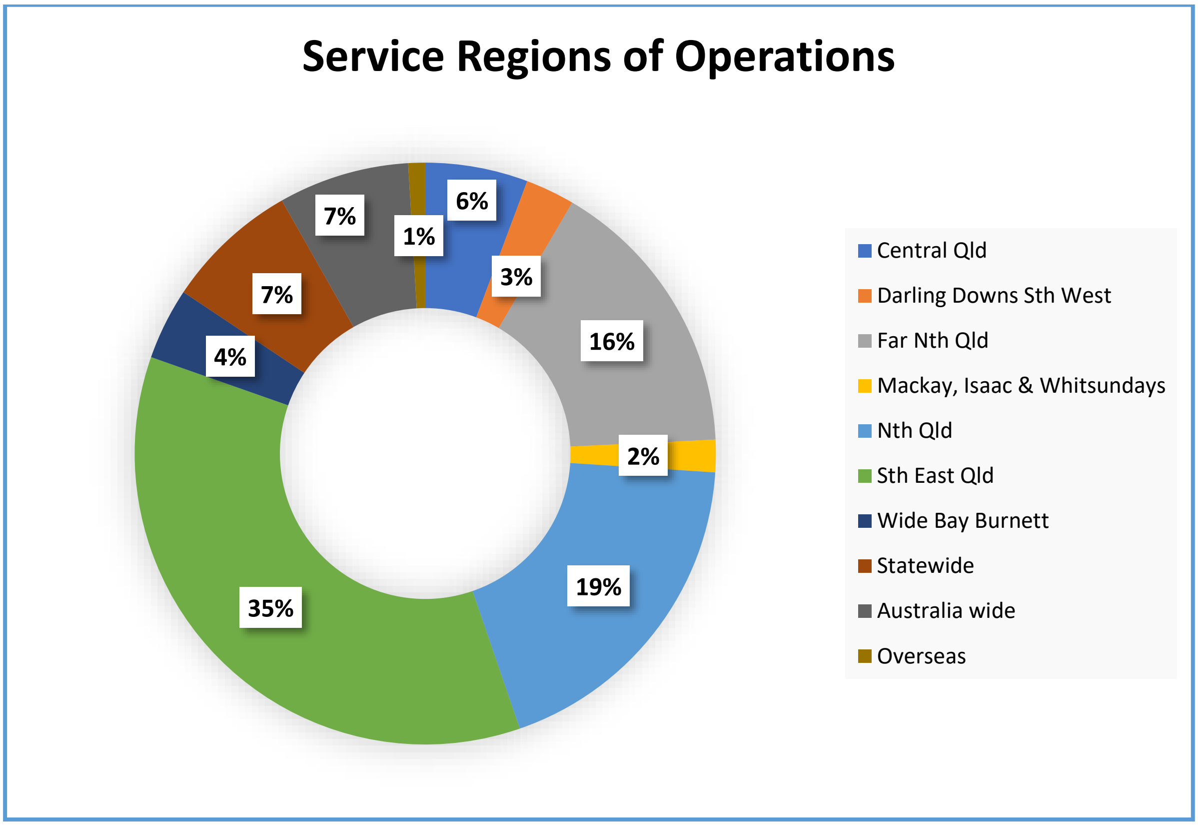
As would be expected from the distribution of Queensland's population, the greatest proportion of services and activities are provided in South-East Queensland (35%), North Qld (19%) and Far North Qld (16%). The next most common responses were the provision of service Statewide (7%), Australia-wide (7%) and Central Qld (6%) (see Graph 5).

The least serviced areas are:

- Overseas (1%),
- Mackay, Isaac & Whitsundays (2%),
- Darling Downs/ South-West (3%), and
- Wide Bay Burnett (4%).

The latter results may partially be explained by the fewer number of organisations listed who are based in those areas, and some isolation from more highly populated regions.

Graph 5: Regions of operation



How Organisations Differ

A Far North Queensland regional retailer has their dominant service market in South-East Queensland.

A remote North Queensland outdoor recreation provider coordinates a range of events, experiences, and participant activity training in their own region, and draws participants from across the state.

An urban school delivers outdoor education on campus but expands their footprint through off site programs and expeditions.

Organisations' Main Outdoor Activities

Using information gleaned from the online search, organisations' main outdoor activities were identified based on their public facing online information. Up to three (3) activities were able to be selected by the coders, and these were standardised through a drop-down menu.

The coding process revealed that while some direct activity providers offered one outdoor activity (e.g. Recreation/ Sport Clubs or Fishing tour operators), others had a mix that could easily exceed 5 activities. Multi-activity provision was particularly notable for outdoor recreation venues, schools, those providing school or recreation camps, and youth-based community organisations like Scouts, Boys Brigade and Girl Guides, for example.

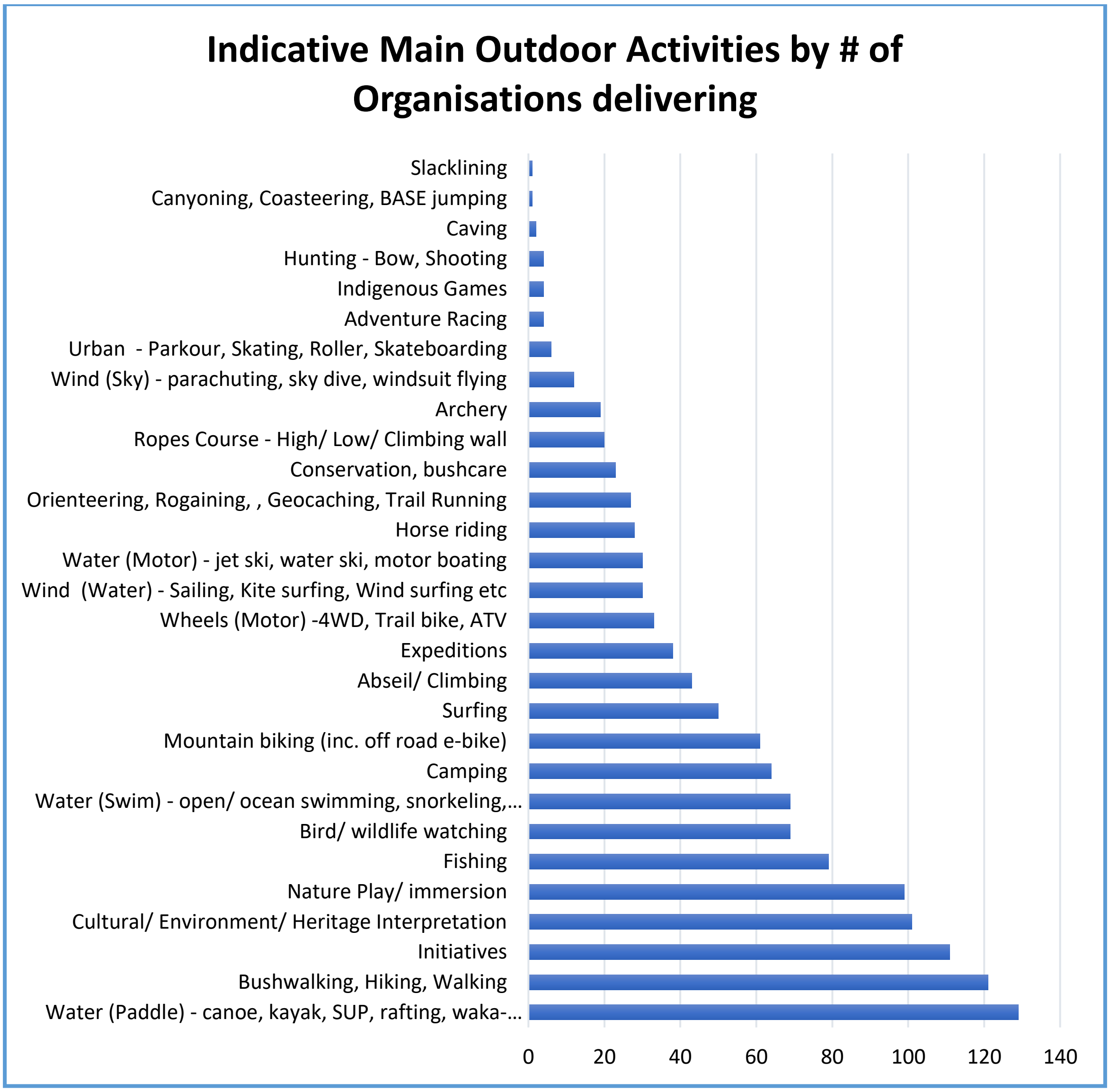
The coded responses reveal the 10 dominant groups of activities including:

- paddling (e.g., SUP, canoe, kayak, raft, outrigger) (129),
- bushwalking/ hiking (121),
- initiative activities[2] (111),
- cultural/ heritage/ environmental interpretation (101),
- nature play/ immersion (99),
- fishing (79),
- bird or wildlife watching (69),
- open water (e.g., swimming/ snorkelling/SCUBA) (69),
- camping (64), and
- mountain biking (61) (see Graph 6).

Five (5) of these require no specialist gear and none require remote or unusual environments for Queensland.

[2] Initiatives is a term used to group a range of team building, problem solving and pioneering activities often used to engage, build individual and group insight and elicit fun and trust. More than an icebreaker, initiatives or ABL (Adventure Based Learning) are typically used in corporate programs and community or school camps, as well as in leadership and health programs (e.g., those using nature and adventure with neurodivergent groups, or as therapeutic intervention).

Graph 6: An indication of the main outdoor activities



Outdoor Centres - A Complex range of Activities

Outdoor Education/ Recreation Centres, whether private or publicly owned, consistently offer a suite of activities and services. Typically, they provide a tailorable choice of activities, which include:

Abseil/ climbing; Ropes Course – High/Low; Water – paddle; Initiatives; Bushwalking hiking/; Camping; Expeditions; Cultural, environmental/ heritage interpretation. Other activities available might be Orienteering/ Rogaining/ Geocaching, Mountain biking; Water – Swim; and Archery.

Many Centres deliver with recreational, educational, or developmental purpose.

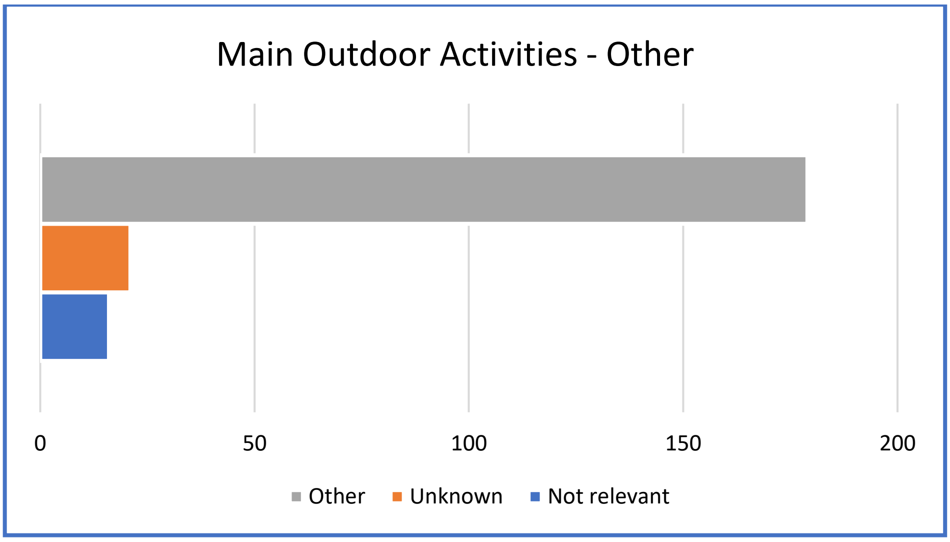
The least represented activities had fewer than 10 unique organisations providing them. These are: Slacklining (1), Canyoning/ Coasteering / BASE Jumping (1), Caving (2), Hunting (Bow, Shooting) (4), Indigenous Games (4), Adventure Racing (4), and urban adventure activities such as Parkour, Skating, Skateboarding (6).

The reasons for this disparity are currently unclear, but may reflect,

- a limited number of activity delivery providers,
- a lack of feasible environments (e.g., caving, canyoning),
- a lack of relevant representation captured in the Contact List, and /or
- lack of skill or expertise relevant to the activity (e.g., slacklining, indigenous games).

Because outdoor organisations include more than participation providers and it was not always possible to discern main activities, 216 organisations were coded as Not relevant (16), Unknown (21) or Other (179) (see Graph 7).

Graph 7: 'Other' and unidentified main activities



'Not relevant' was used to illustrate organisations with an aligned or support role with the outdoor sector, but no direct engagement with the outdoors. For example, this includes tourism/ outdoor marketing organisations, consultants working on sector development / services, research programs, and other allied services.

Those identified as 'Unknown' represent organisations providing direct service, but the activities themselves are unclear. For example, this includes Allied Health/ Nature Therapy providers who support or utilise outdoor activity or nature engagement, but their outdoor tools are not evident.

'Other' was the largest coded response and incorporates the range of support service organisations, land/ water managers, as well as some activities not readily covered by those listed above.

From an outdoor activity perspective, these include:

- Sandboarding
- Scenic tours (e.g., in National Parks)
- Floating down a river
- Mountaineering
- Indigenous based cultural tours
- Spearfishing
- Survival skills
- Cycling (not Mountain biking)
- Nature photography
- Ballooning (3)
- Indoor skydiving
- Kick-biking
- Stargazing (3)
- Segway riding
- Bungee jumping
- Bridge climb
- Gardening
- Ziplining (4)
- Skirmish/ Paintball (3)
- Trekking with donkeys

Evident from this is the range of activities embraced as outdoor activities are diverse, and an awareness that future coding will need to accommodate for this diversity. This may be through enhanced grouping of like pursuits (e.g., Water – paddle; Wheels – Motor); or by expanding codes as activities trend or are popularised.

'Other' also accounted for Services provided including:

- Trail development/ bushcare
- Land/ Water Management
- Marketing and Information services (inc. Visitor Centres, guides, websites, app development etc)
- First Aid/ Vertical rescue/ Tree loppers
- Outdoor retail provision/ supplies
- Insurers
- Accommodation providers
- Research, policy, and planning
- Training
- Networking services

Local & Regional Councils - The Contribution of 'Other Services'

Local and Regional Councils contribute valuable opportunities that enable individual and commercial outdoor activity, and support community connection with the outdoors. This is through their willingness to plan for participation and opening of the landscape, their partnerships with State, their ongoing management of natural spaces, their education of users, and through the provision of sufficient infrastructure (e.g., trails, parking, toilets, shade, horse trailer turn arounds, activity specific tracks) to make spaces welcoming, sustainable, and accessible.

Section Two: Census Findings

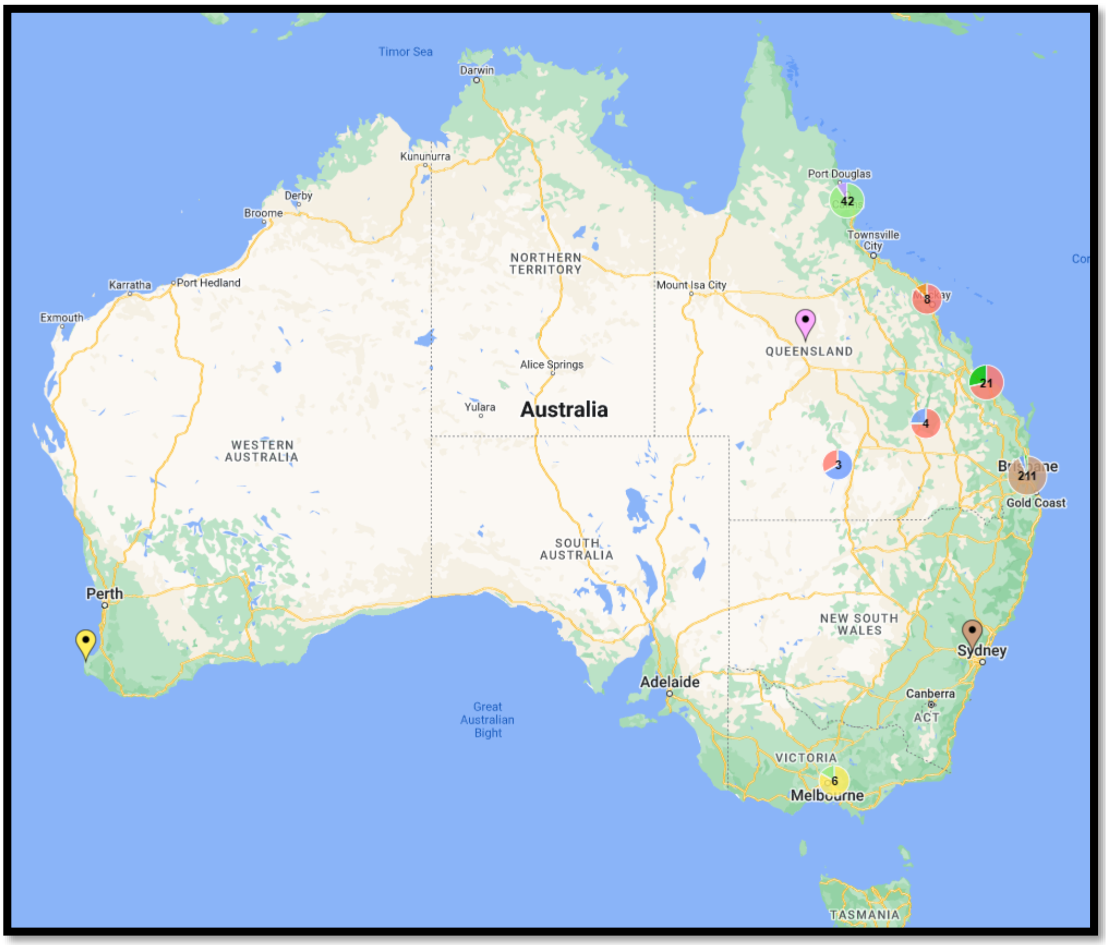
Photo: Thorp_Into the Light

Who Completed the Census?

The 2023 Outdoor Census was open to any organisation delivering, facilitating, or supporting outdoor activities, experiences and services in Queensland.

The census was completed by **324** unique organisations.

Figure 2: Heatmap of 2023 Census Respondents



As illustrated in Figure 2, census respondents represent multiple regions on the Australian mainland, with the majority having their base of operations in South-East Queensland (SEQ) (68.5%). An additional 11.4% of respondents are based in Far North Queensland (FNQ), with 6.5% from Central Queensland (CQ)[3].

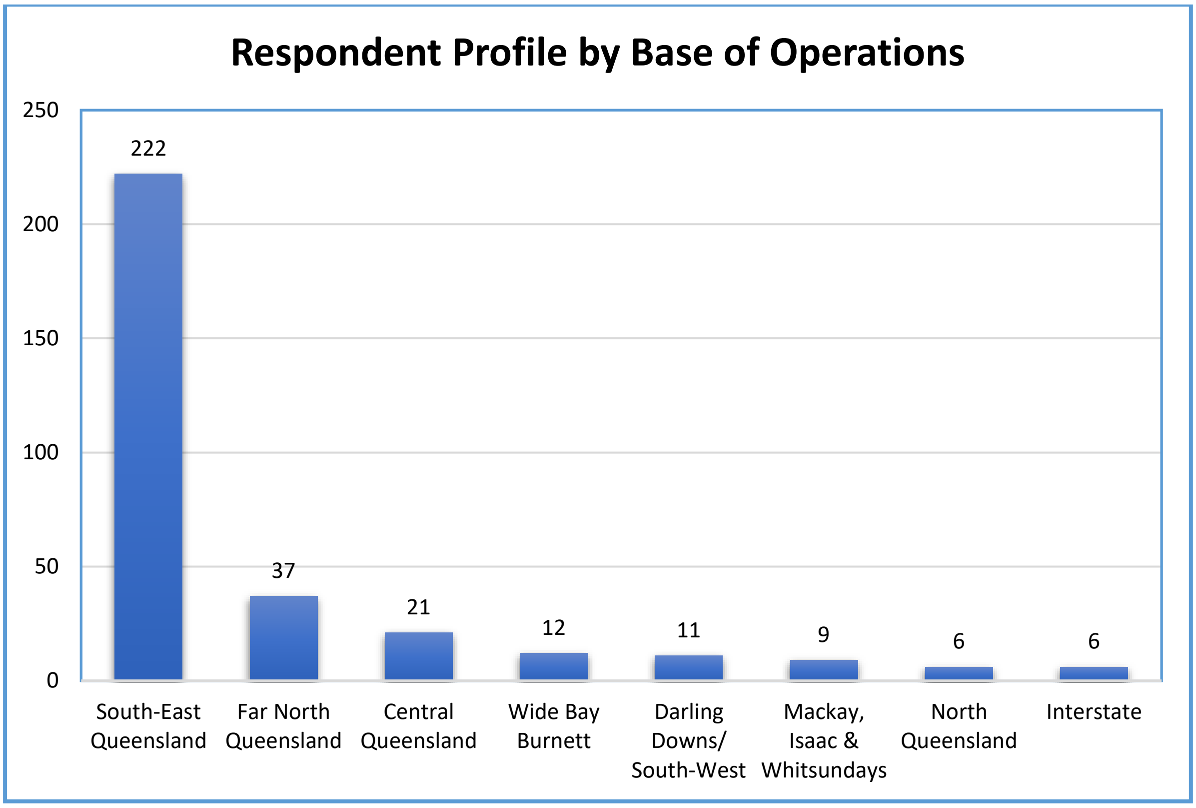
The remaining regional areas each represented less than 5% of the respondents (see Graph 8), with:

- 3.7% from Wide Bay Burnett (WBB),
- 3.4% from Darling Downs/ South-West (DD/SW),
- 2.8% from Mackay, Isaac & Whitsundays,

[3] The heatmap infers a predominance of coastal respondents. While this is illustrative, the pins represent regions and fail to pinpoint respondents based further north (e.g., Thursday Island) and west (e.g., Mt Isa).

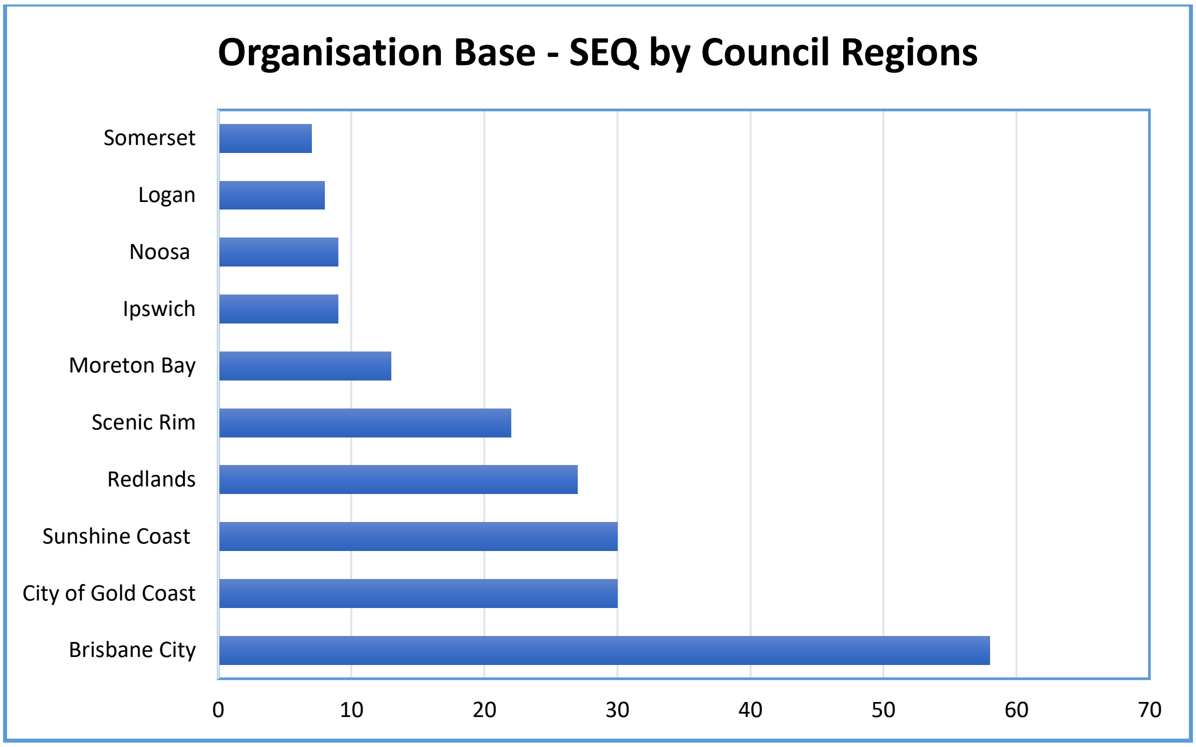
- 1.85% from North Queensland (NQ), and
- 1.85% based Interstate.

Graph 8: Respondent Profile by Base of Operations



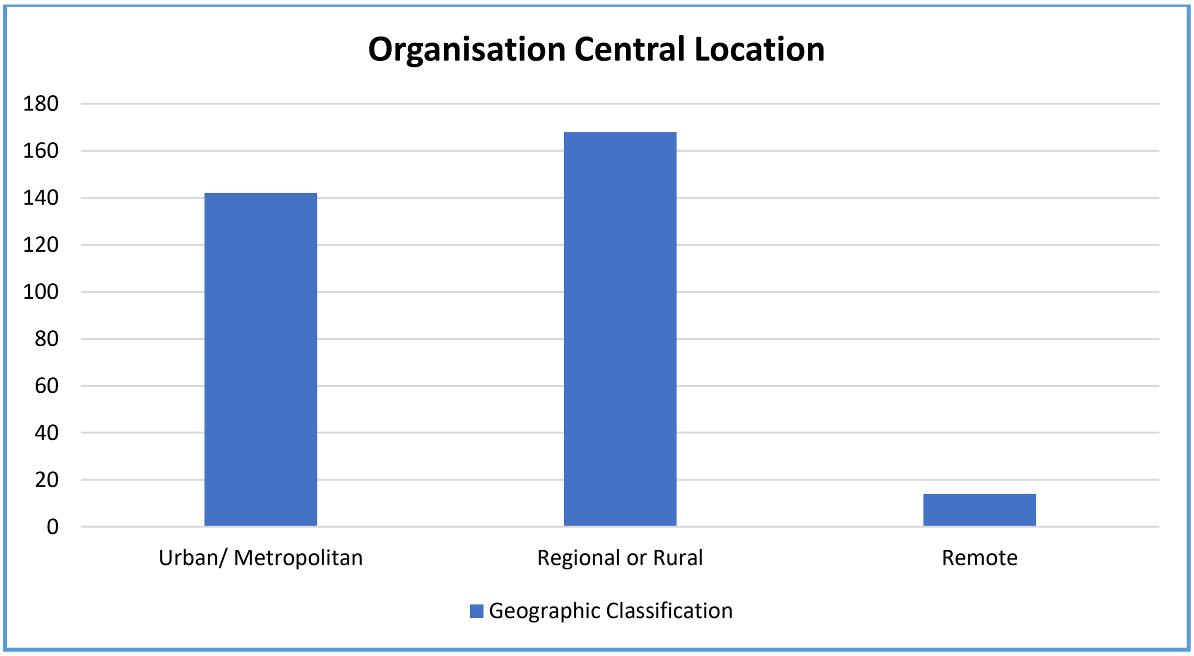
With such high representation from SEQ, this region was examined for greater granularity revealing that while 27% of respondents were based in the Brisbane City Council area, there was representation from across all South-East Queensland council regions (see Graph 9).

Graph 9: Council Breakdown for SEQ Organisations



Across all respondents, the majority viewed their base of operations as Regional or Rural (51.85%) or Urban/ Metropolitan (44%) (see Graph 10). Fourteen (14) respondents, or just over 4%, are based in Remote locations.

Graph 10: Self-Identified Regional Classifications

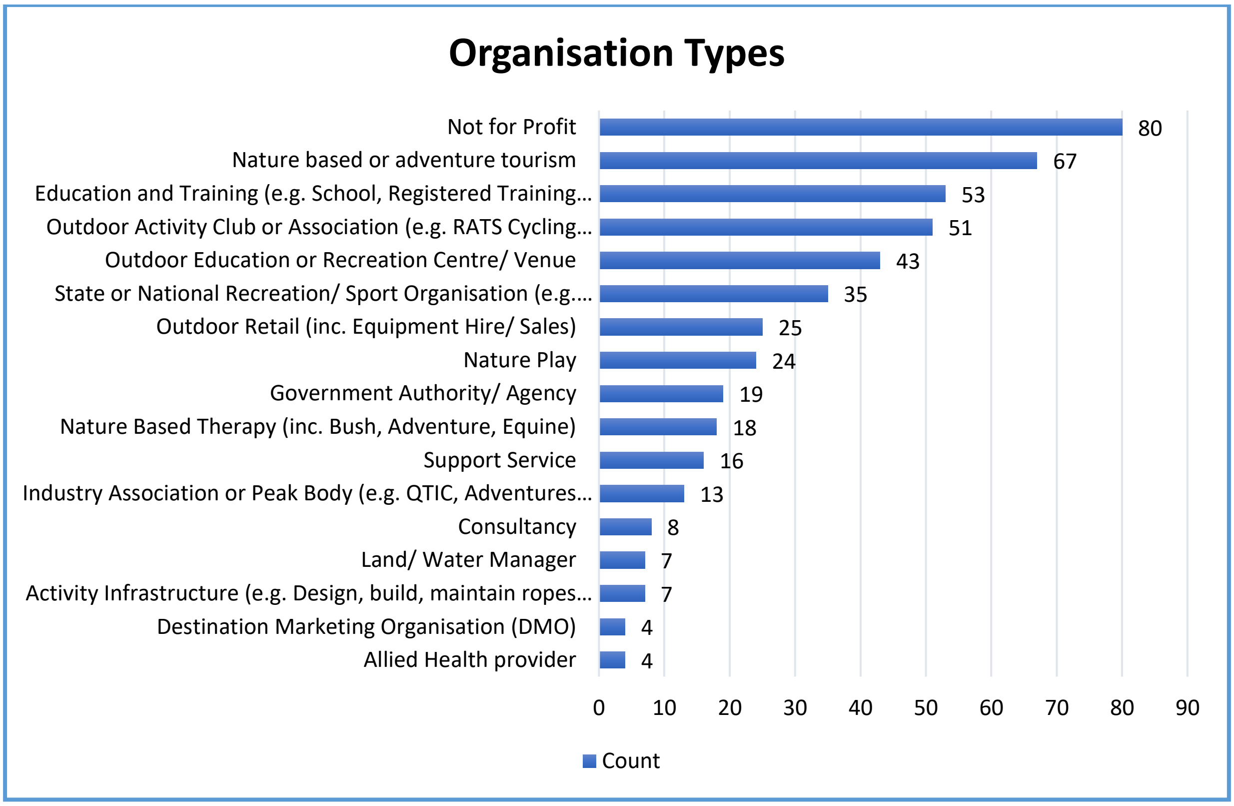


The Business of Outdoor Organisations

The respondents represented a wide range of organisation types as befits the diversity of the outdoor sector. Able to identify up to three (3) descriptors each, the most frequent representation was from Not-for-Profit organisations (25%)[4], with Nature-based or Adventure Tourism (20.5%), Education and Training providers (16%), and Outdoor Activity Clubs or Associations (15.75%) each having more than 15% of respondents (see Graph 11).

The organisation types respondents least identified were Allied Health Professional and Destination Marketing Organisation (just over 1% each).

Graph 11: Respondents by Organisation Type



Additional to the predefined category choices, 13 organisations identified as 'other' and categorised themselves as Conservation focused, Information services, Event providers, or Safety Support services.

Main Outdoor Services, Activities and Experiences Provided

Respondents were able to indicate up to three answers to illustrate the main outdoor services, experiences, and/or activities they provide. Collectively, and in order of frequency, five (5) services/ activities accounted for 60% of all valid responses, namely:

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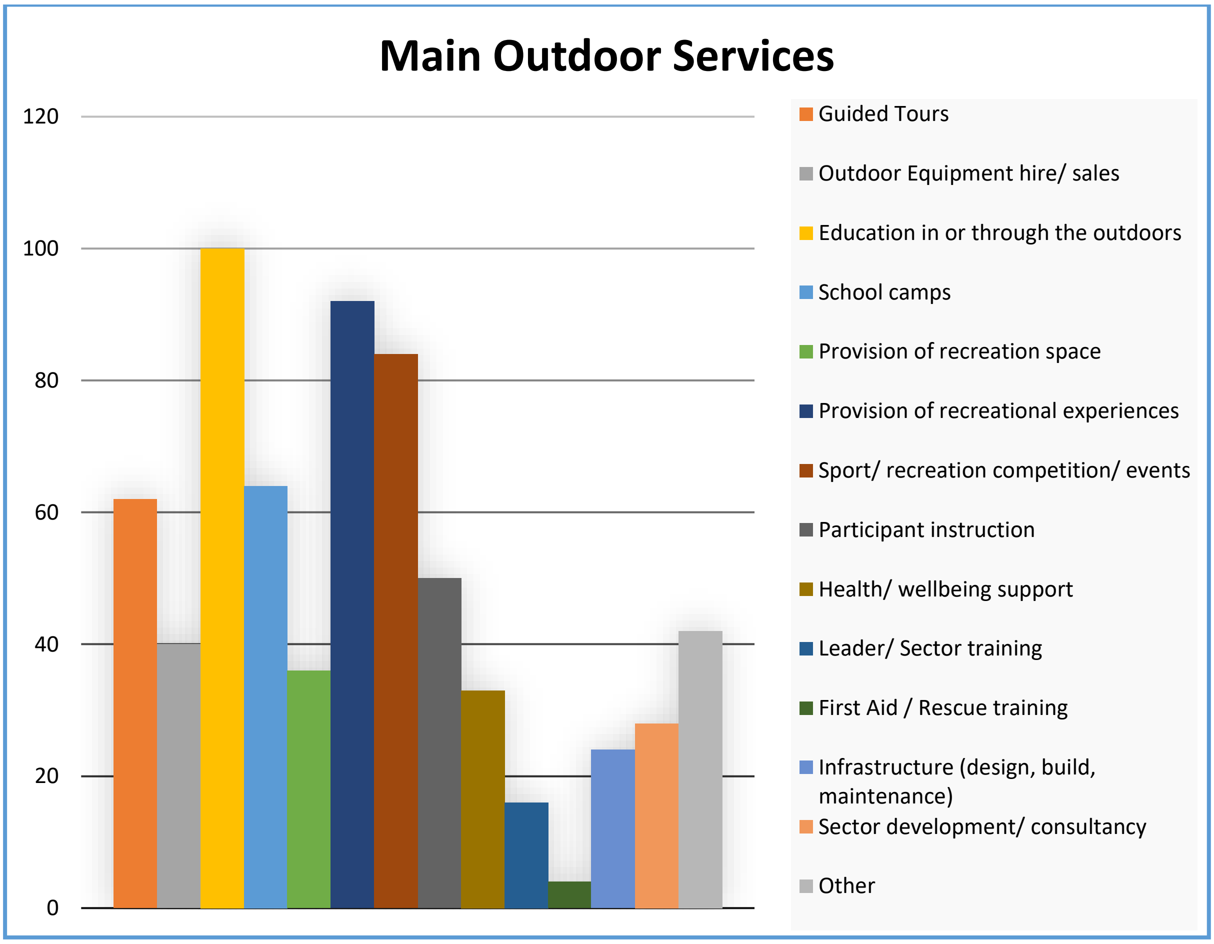
[4] Forty five of the eighty organisations (56%) who selected NFP, also identified as one other organisation type. Most typically, organisations picked a single organisation type or a unique combination. Three groups stand out as having 10 or more respondents choosing the same combination, namely: Nature or adventure tourism operator + Outdoor retail (4%); NFP + Outdoor Activity Club (6%); and NFP + Outdoor Education/ Recreation Centre (4%).

- Education in or through the outdoors,
- Provision of recreation experiences,
- Provision of sport/ recreation competition or events,
- School Camps, and
- Guided Tours (see Graph 12).

Forty-two, or 6% of respondents did answer 'Other'. While some of these responses constituted additional detail relating to activities already selected, there were additional services not captured in the options provided in the census, including:

- Land care/ nature regeneration;
- Information services (inc. development of guidebooks, promotional films);
- Member services;
- Advocacy; and
- Cultural mentoring/ Indigenous Tours.

Graph 12: Main Outdoor Services/ Activities/ Experiences



Organisations providing services with dominant foci on First Aid/ Rescue Training, Leader or Sector Training and Infrastructure design/ building/ maintenance were the least represented (> 4% each of valid responses) among the respondents.

Clubs and Associations – delivering services on multiple fronts

When responses are viewed across whole respondents it becomes clear that Outdoor Activity Clubs/ Associations cannot be contained to three main activities. Rather they highlight their activities include:

recreational experiences,
sport/ recreation competitions/ events,
participant instruction, and
leader/ sector training.

Many utilised the text option to note they also:

contribute to health/ wellbeing,
might deliver first aid/ rescue training; and
provide advocacy and representation for participants in their outdoor activity.

While paddling or horse-riding, bushwalking or trailbike riding might be their core pursuit, the activities of Clubs and Associations stretch far beyond coordinated participation.

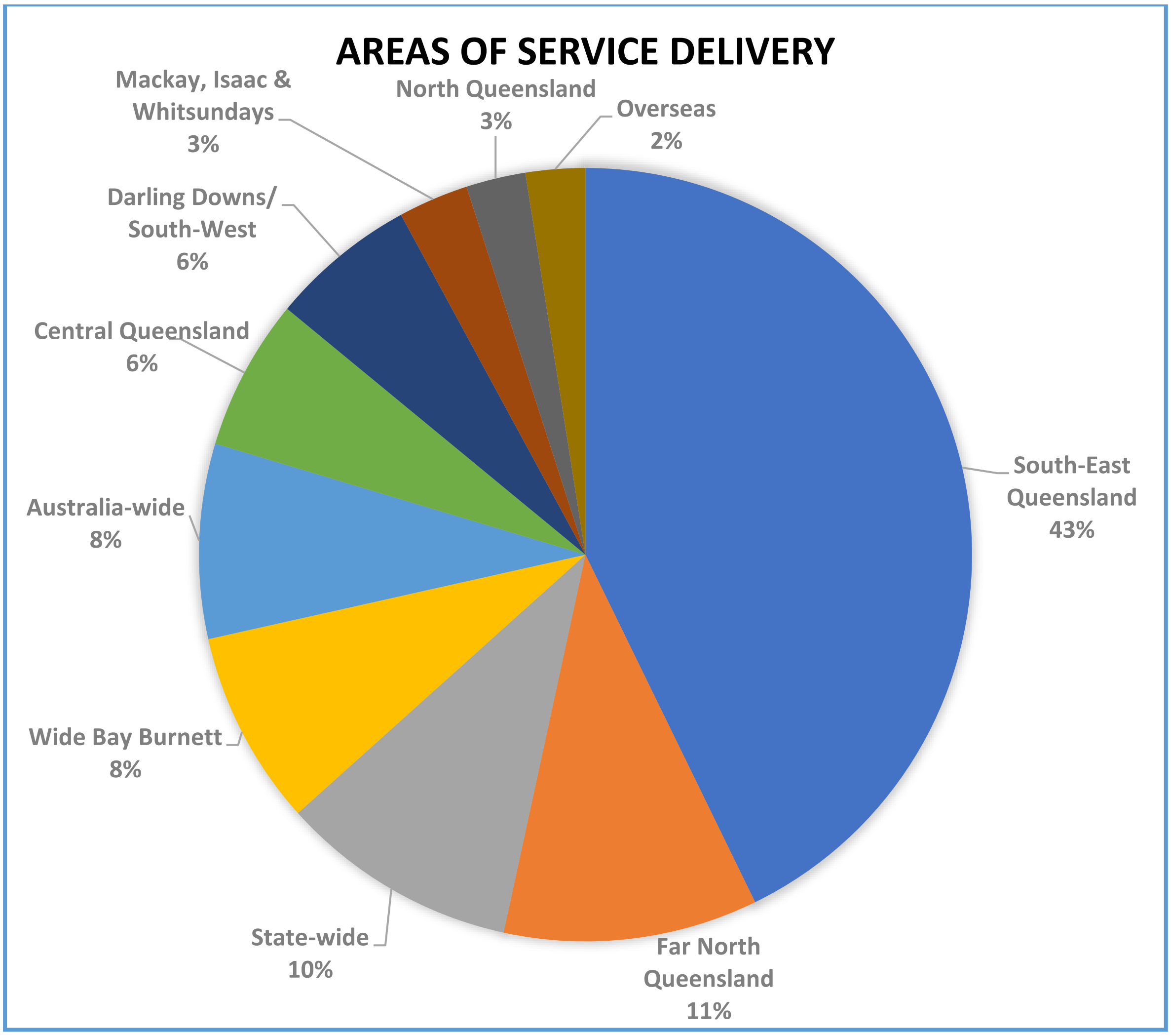
The Outdoor Sector - Reach to Clients, Customers, Participants

Where They Deliver

Nearly 43% of responding outdoor organisations deliver their services within South-East Queensland; and 10% deliver across the state. Not all organisations were limited to any one region of service delivery with 15% identifying they deliver services to more than one region. Of these, 8% provide their services across Australia; and 2.5% identify overseas.

The areas with the most service delivery from the responding organisations fall in SEQ, FNQ and State-wide, followed by WBB, and Australia-wide (see Graph 13).

Graph 13: Areas of Service Delivery



Qualities of Clients, Customers, Participants

Most organisations typically work with a range of clientele (see Graph 14).

Across the outdoor sector, nearly 90% of respondents work with adults at least some of the time. While the mix of clients vary, more than 66% of responding organisations also work with families, groups, teenagers, and youth.

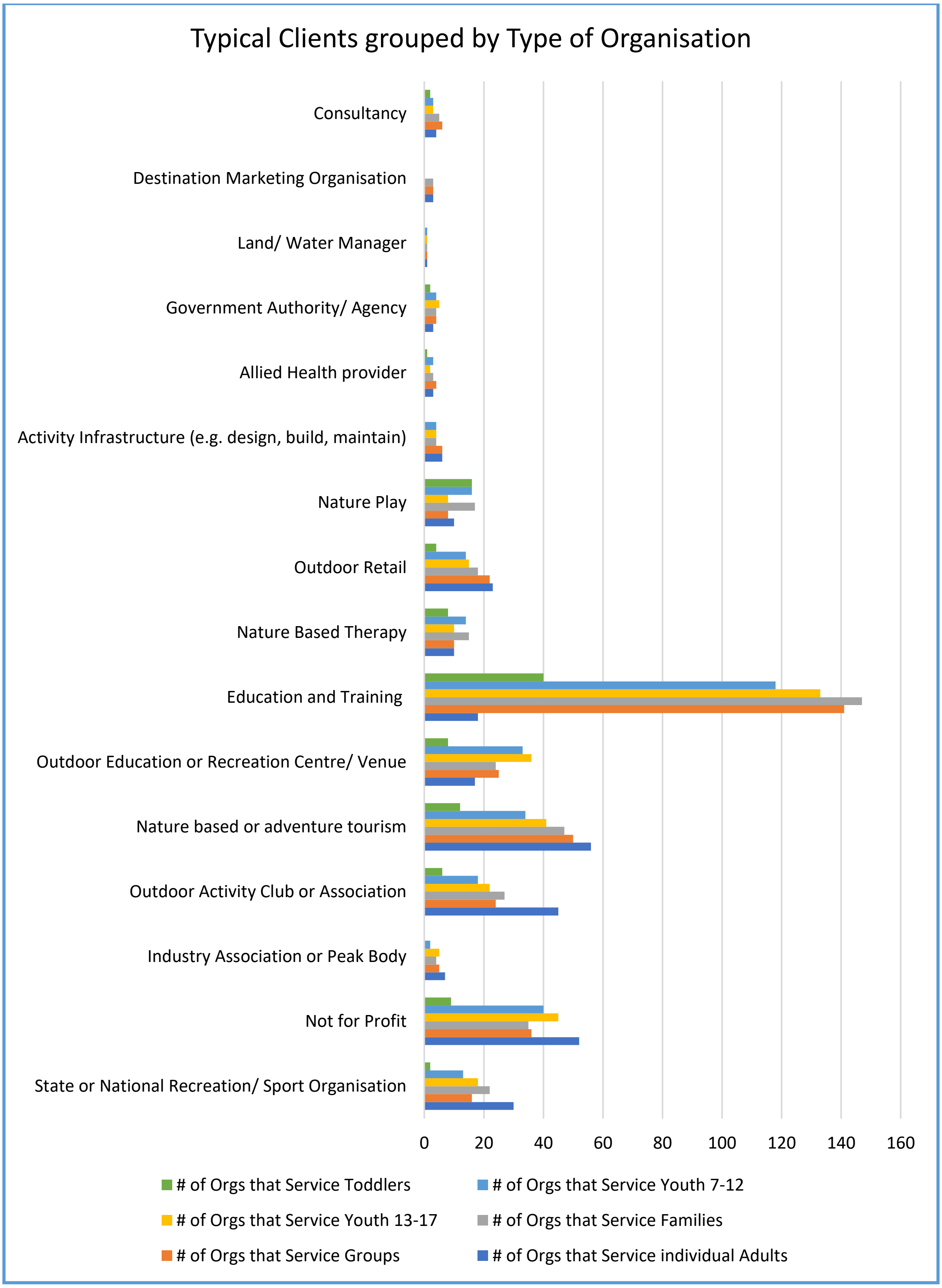
Toddlers were the least specifically serviced group, with 70% of respondents rarely or never working with them. Even so, for more than 20% or respondents, toddlers were a typical client. This response was dominated by organisations who identified themselves as Education and Training, Nature Play (Recreation and Education); and Nature based or adventure tourism (see Graph 9).

Graph 14: Typical Clients

When typical clients are examined according to the Type of Organisation, significantly greater numbers of Education and Training organisations provide services to Groups, Families, Youth 13-17, Youth 7-12 and Toddlers (not Individual Adults). Across these client types, Education and Training organisations were 3 times more likely to see these as typical clients (See Graph 9).

Reflective of the organisations participating in the census, Nature Based or Adventure Tourism, Not for Profits, and Outdoor Activity Clubs/ Associations are the next most numerous organisation types working with Adult Individuals, Groups, Families, and Youth (7-17) (see Graph 15).

Graph 15: Typical Clients by all Types of Organisations



Adult individuals were identified as the most dominant typical client (even if only minimally), by:

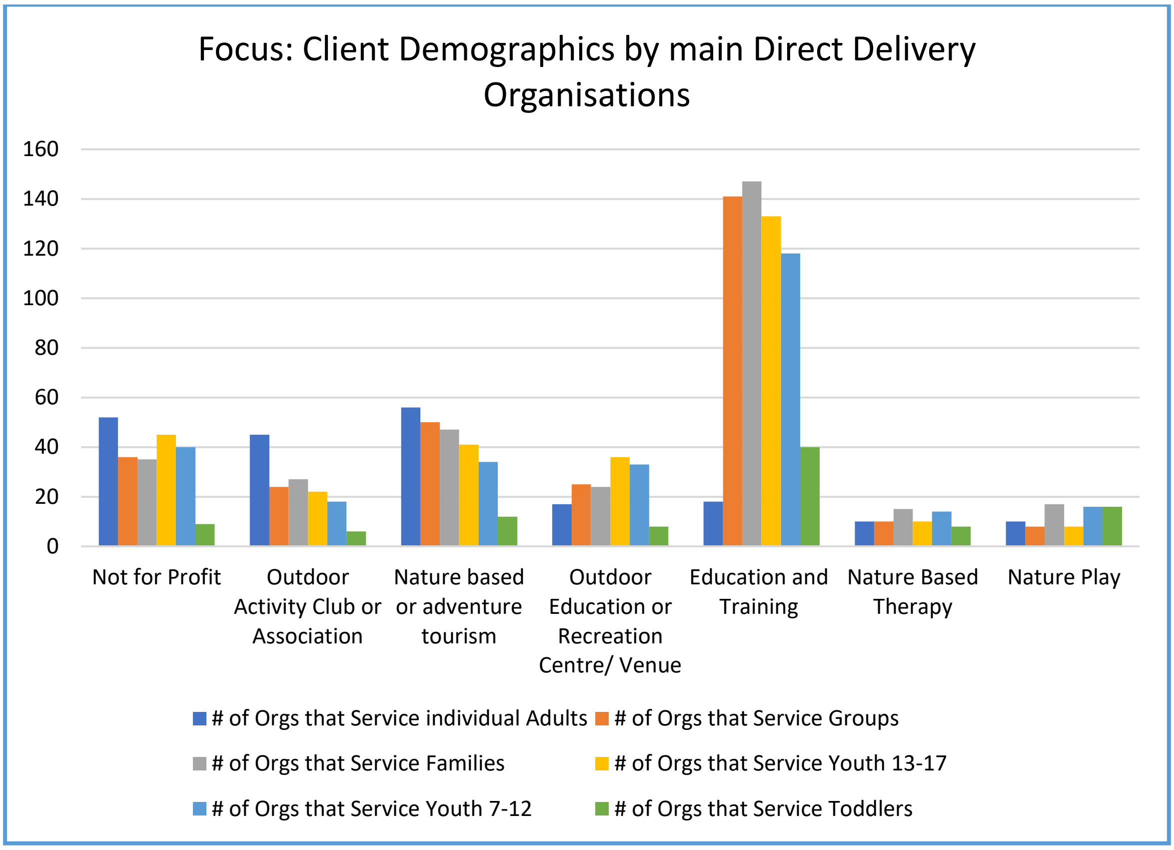
- Nature or Adventure Tourism;
- Not for Profit/ Community Organisations;

- Outdoor Activity Clubs/ Associations;
- State or National Sport or Recreation Organisations;
- Industry Associations/ Peak Bodies; and
- Outdoor Retail (with a small margin over Group clients).

As would be anticipated, Consultancies, Destination Marketing Organisations, Land/ Water Managers, Government Authorities/ Agencies, and Activity Infrastructure organisations have the lowest response rates with individual adult clients. The difference in responses can be partially explained by the fact that not all organisations connected to the outdoor sector provide direct delivery with participants. Instead, these organisations clients are captured as 'groups' (or industry/ government agencies) (see section Critical Clients).

A more focused illustration of the client types for organisations who do offer direct outdoor activity provision can be found in Graph 16. This highlights the diversity of clients serviced by organisations who identified direct service delivery priorities.

Graph 16: Focused insight of client demographics for largest direct outdoor activity providers

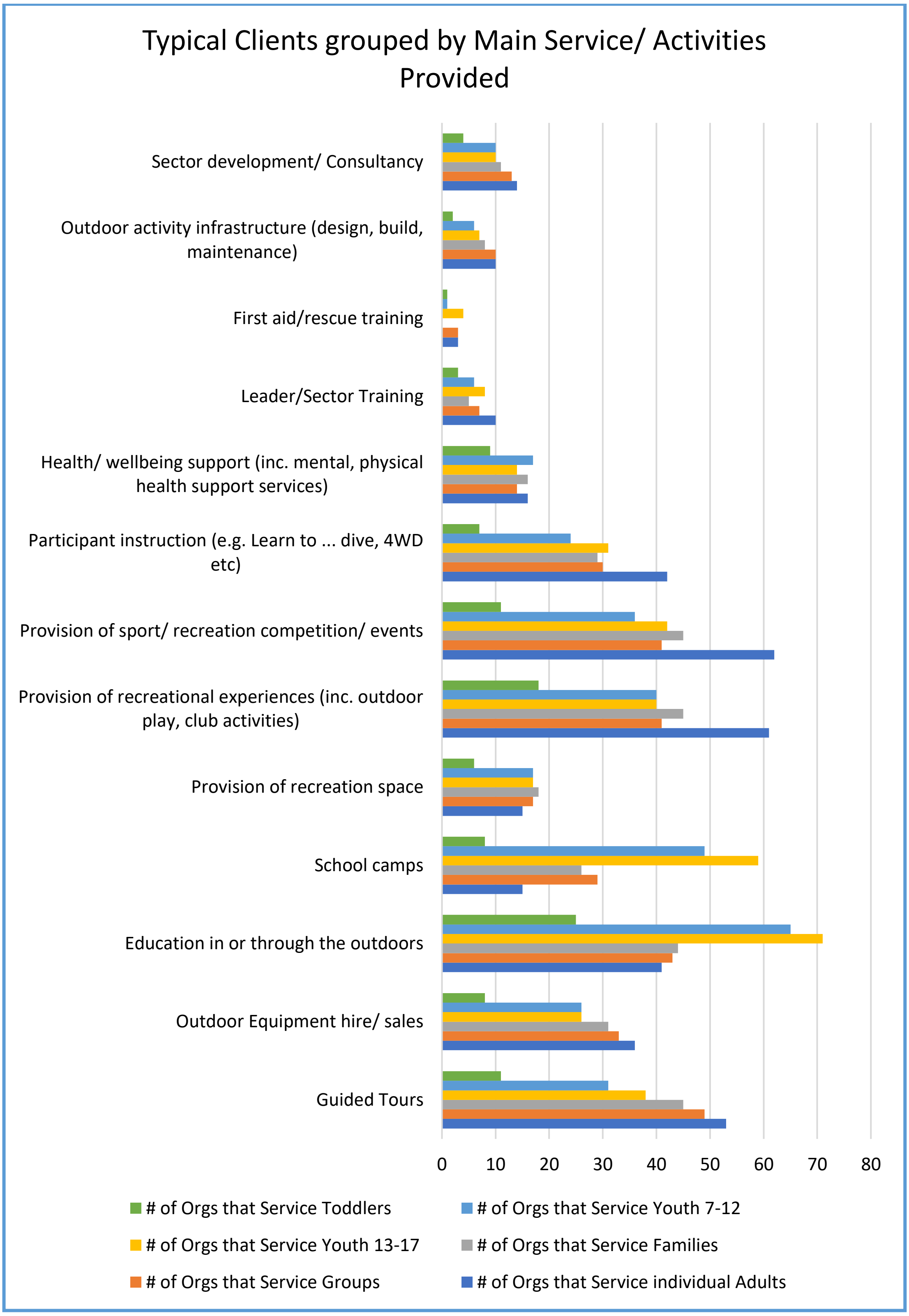


These insights are reinforced when typical clients are considered based on the services, activities or experiences being provided. For example:

- Education in or through the outdoors and School Camps typically work with Youth (7 - 12 & 13 - 17);
- Individual Adults are a dominant typical client for those providing sport or recreation Events or Competitions and Recreational experiences; as well as for those offering Guided tours and Participant instruction; while

- organisations offering Outdoor Equipment hire or sales, the provision of Recreation Space, and Health/ Wellbeing support tend to be relatively evenly distributed across most typical client types except for Toddlers (see Graph 17).

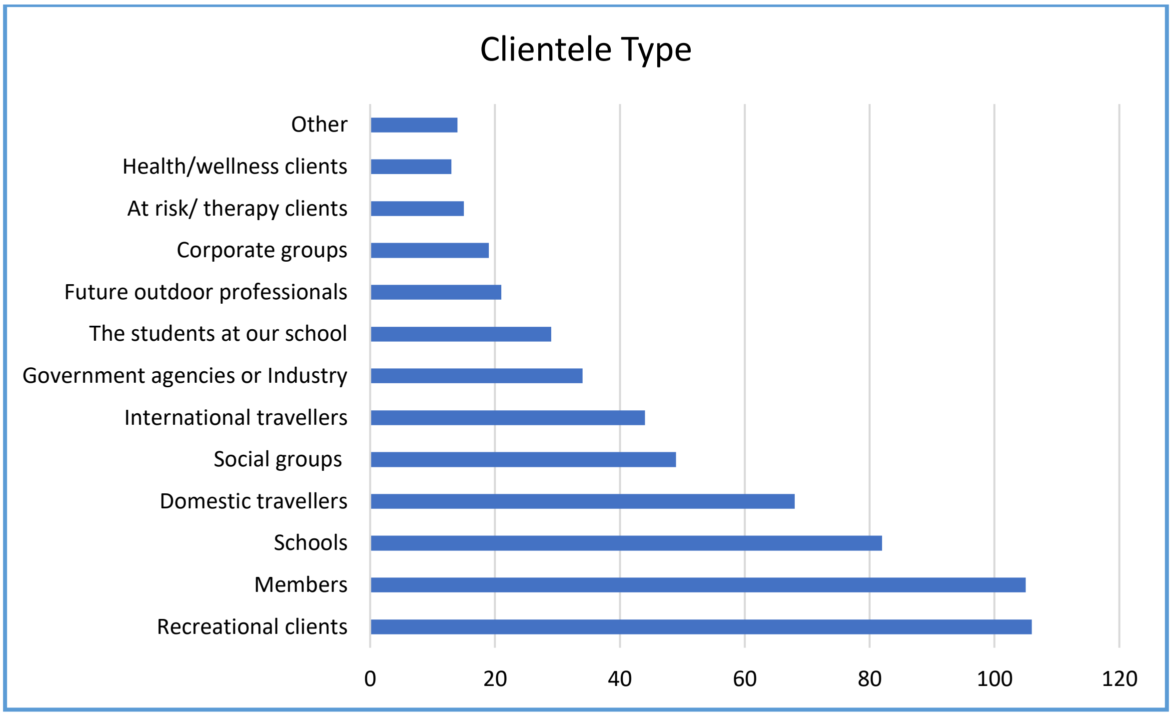
Graph 17: Typical Clients grouped by Services/ Activities



Critical Clients

Moving beyond demographics, more than 100 organisations reported their most critical clients were members and recreational clients, with schools and domestic travellers being the next most identified type of clientele (see Graph 18).

Graph 18: Critical Client Types



At risk/ therapy clients, Health/ wellness clients, Corporate groups and Future outdoor professionals were the identified least as critical clients; along with 'Other'. In this instance, 'other' included clients defined as:

- community organisations,
- sporting groups/ participants,
- churches,
- young children and their parents,
- the general public, and
- a collection of niche markets.

Government / Industry as Critical Clients

Government agencies or Industry are critical clients for a range of outdoor organisations including Activity Clubs, SRO's, Community Groups, Trail builders, Consultants/ Sector developers, Industry Associations, some Allied Health providers and Tourism operators, a Registered Training Organisation and other Government agencies.
With such disparate organisations recognising the centrality of government and/or industry as clients, the synergistic relationships required for developing, delivering, sustaining, and influencing the outdoor sector becomes evident.

This 2023 census found more organisations provide services for domestic travellers (68) than international travellers (44). While reasons for target markets were not sought, this response *may* be impacted by the residue of the international border closures of 2020 and 2021 as this census was conducted in 2023. This is a topic of potential future trend analysis.

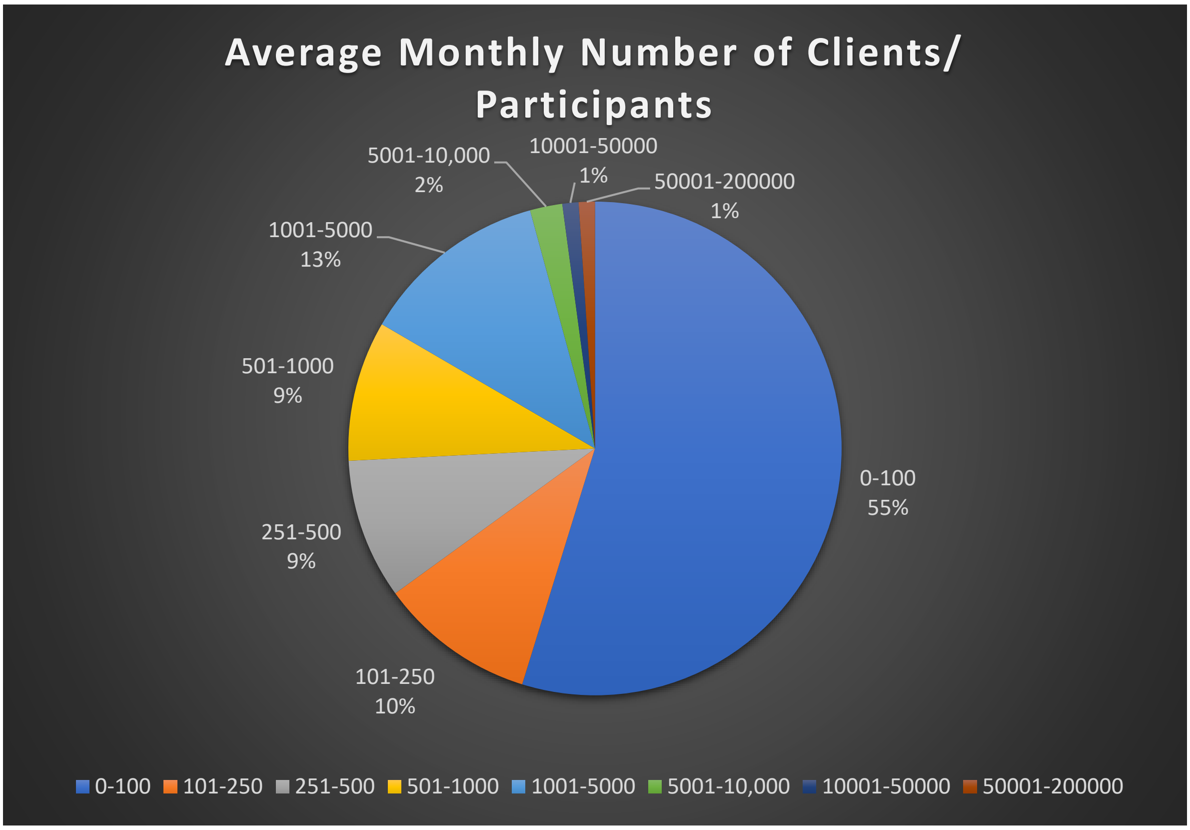
What is likely is the findings reflect the size and location of the organisations responding. A detailed review of actual responses shows those who nominated only domestic travellers were typically local and regionally based, with quite niche services. These providers are more likely known and accessible to domestic visitors with independent modes of transport.

Participant Numbers

All Valid Responses

Outdoor organisations work with varying numbers of people/ clients each month. On average 55% of responding outdoor organisations provide services for up to 100 clients/ participants per month (see Graph 19). Nearly two-thirds (65%) provide services to between 0 and 250 clients/ participants per month; and 74% provide services to up to 500 clients/ participants in an average month.

Graph 19: Average Monthly number of clients/ participants



More than one-fifth (22%) work with between 501 and 5000 client/ participants in an average month' while 4% of organisations indicated their average number of clients/ participants were more than 5,000/month (max 200,000).

When considered as a total, the valid responses of average monthly number of clients showed a total of 706,432 clients or participants across 289 organisations. On these figures the mean number of monthly participants was 2456, with a median of 100. This reflects a range of responses from between 0 to 200,000.

To clarify participation insights, outliers were identified and removed. This resulted in the data being refined to exclude non-outdoor focused[5] Government Agencies and City and Shire Councils (n of 16); as well as one large information-based organisation that contributed national, not State figures. While each of these participation figures are important and delivered valid numbers of people who accessed their services and/or used the lands/ waters they managed[6], their participation figures did skew the findings.

Once removed from the data set, the total average monthly participation was 276,952 from 272 organisations. Using this restricted respondent list, the mean number of participants was 1011[7].

Across the organisations,

- 56% service between 0-100 clients/ participants in an average month;
- 67% provide service to 0-250 clients/ participants;
- 77% of organisations service up to 500 clients/ participants; and
- 22% service between 501 and 10,000 clients/ participants (see Graph 20).

Once outliers were removed, the maximum client/ participant numbers were 40,000, with several other organisations working with 30,000+ clients/ participants in an average month. Important to note, cross referencing with types of organisations showed those servicing more than 500 people/ clients each month were diverse and included:

- NFP Community Organisations;
- Outdoor Recreation/ Education Centres;
- Nature/ Adventure Tourism Providers;
- Activity Associations; and
- Outdoor Retail (sales/ hire).

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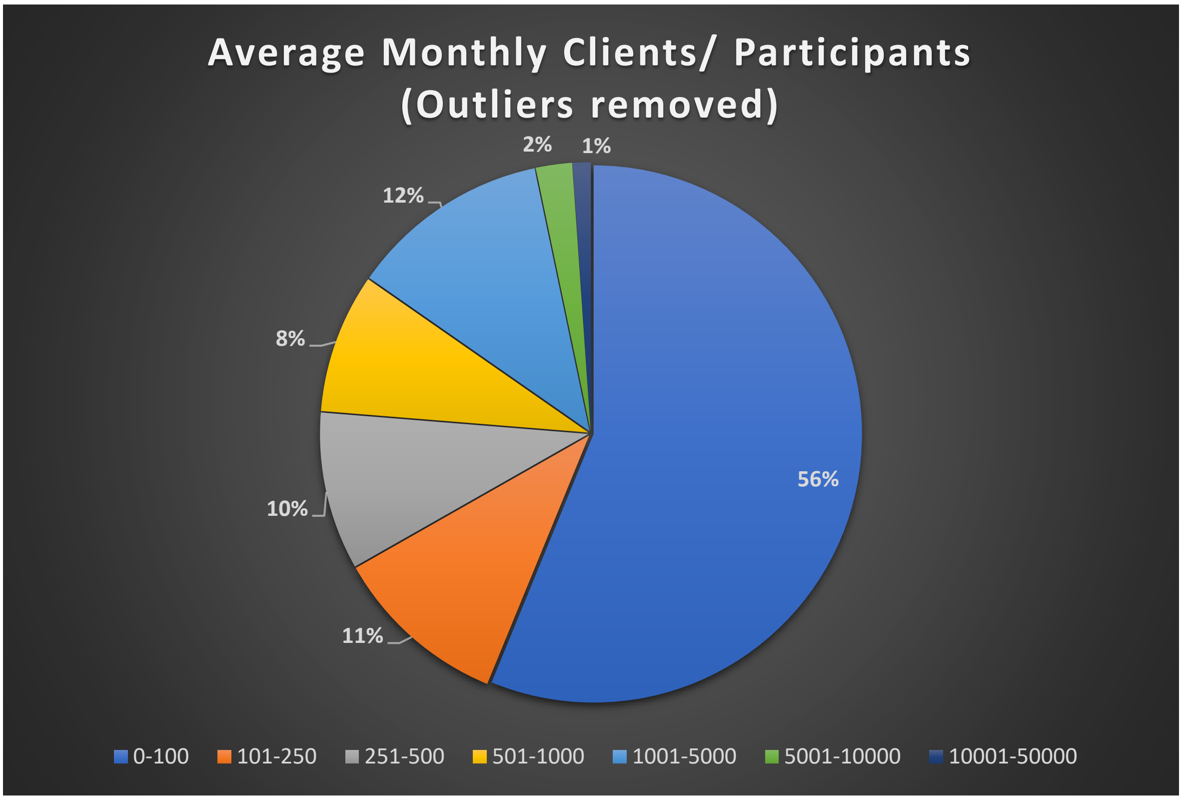
[5] Government agencies that are delivering outdoor programs or venues were sustained. 'Non-outdoor focused' refers to departments with a side interest in the outdoor sector but no direct role (e.g., Qld Police Service). City and Shire Councils were discounted as some of these reported large totals well beyond other organisations.

[6] To test the figures, three agencies who provided contact details and were known to the researchers, were directly contacted to clarify the foundation of the figures provided. Each respondent confirmed strong confidence in their counts. Indeed, direct communications revealed their participant numbers were organisationally viewed to be conservative averages.

[7] With the removal of outliers, the arithmetic average was identified as the best measure of average monthly participants/ clients and ensures all remaining data values are taken into account. The average was used to extrapolate to the Census Contact List. This resulted in an average value of 991,791 participants/ clients each month.

Graph 20: Average Monthly number of clients/ participants - Outliers Removed



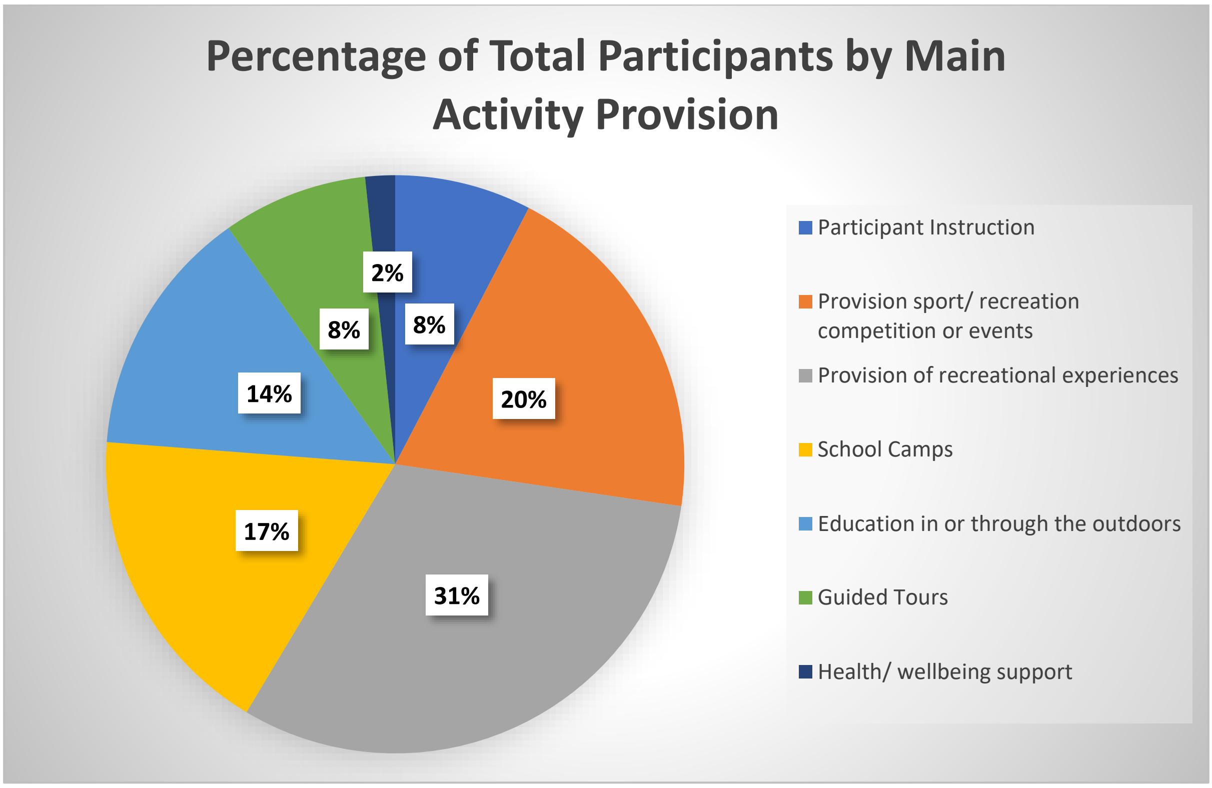
Snapshot: Participation in Outdoor Activity

While organisations were not asked for activity specific service numbers, we can infer that a lot of participation is accounted for in the direct delivery of activities. For example, when the total number of participants are mapped against Main Outdoor Activity, more than 58% of average monthly participants or clients are serviced by Direct Activity Providers (i.e., participant instruction, provision of competition/ events, school camps, education in or through the outdoors, guided tours, or health/ wellbeing support).

When we focus on these activity providers, a story emerges showing that nearly one third of participation is through the Provision of Recreational experiences, one-fifth in the Provision of Sport/ Recreation Competitions or Events, and just under one-fifth is through School Camps. That is, those who have large scale events or large client groups (e.g., schools, members) work with the most people in an average month.

For the respondents to this census only, Health/ Wellbeing Support, Participant Instruction and Guided Tours accounted for the least percentage of total monthly participation figures. It should be noted however that several large tourism providers did not provide participation numbers; and this insight does not illustrate how many people each organisation might independently service in different activities.

Graph 21: Percentages of Total Participants by Main Activity Provision



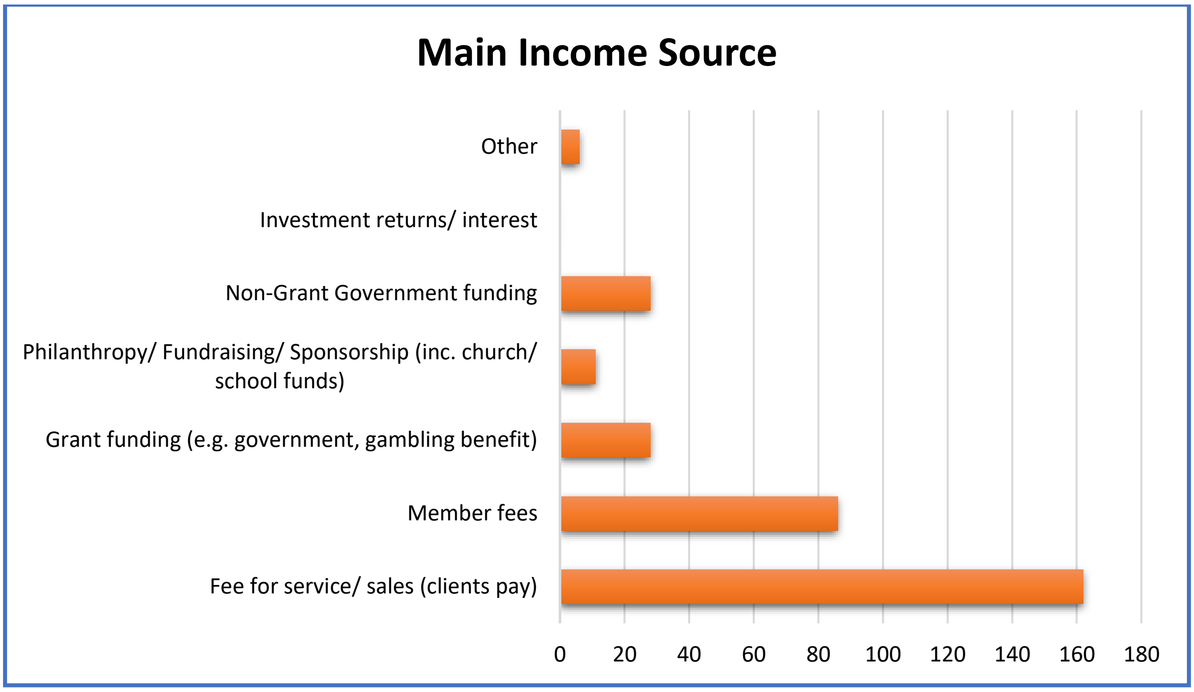
Main Source of Income

More than 50% of respondents identified Client fees or sales as their main source of income, with the next most common response being Member Fees (27%).

For 21% of organisations their main source of income was rendered via fundraising, grant funding or through non-grant government funding, with just under 2% of respondents noting 'Other' as their response. This included representation from organisations that were self-funded/ did not generate any income, secured income via advertising, or through rental fees from property.

No organisation considered investment returns or bank interest as their main source of income (see Graph 22).

Graph 22: Main source of income



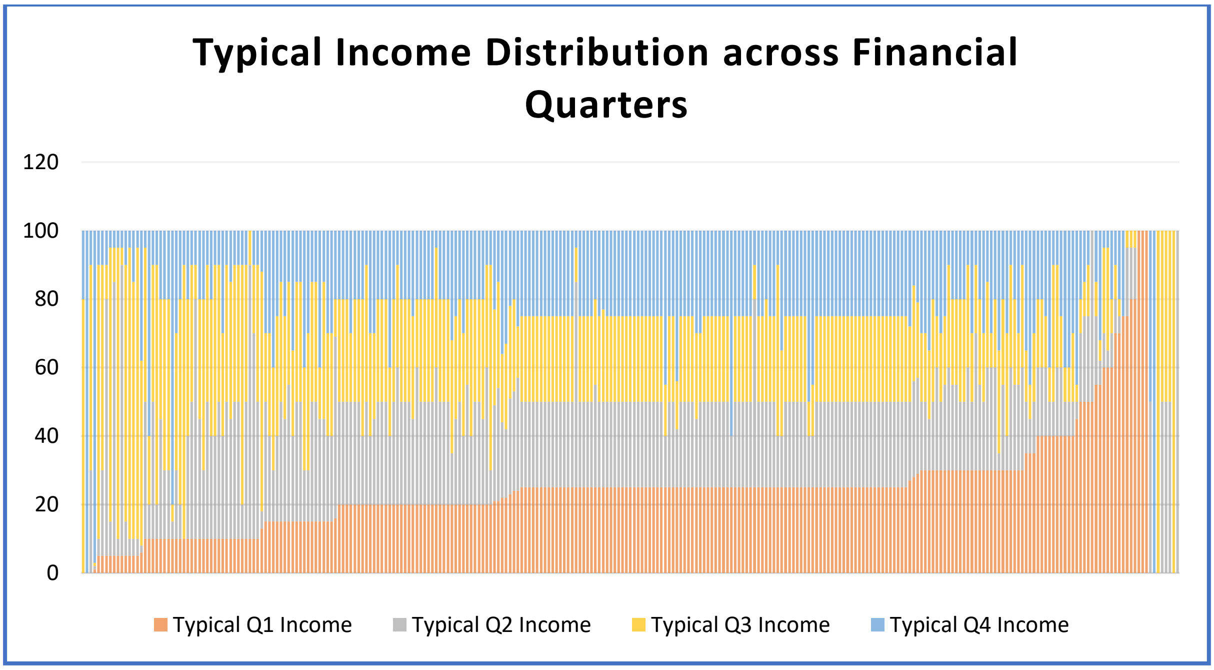
Financial Year Earnings

Many organisations earn their income relatively consistently across each financial year quarter (Q) with 26% of respondents reporting an even distribution (see Graph 23).

An examination of the data by financial quarter revealed that:

- July-September (Q3) did show slightly higher income returns when averaged across all valid responses; and
- fifteen percent (15%) of organisations income may be described as entirely unevenly distributed. That is, they earn more than 50% of their revenue in a single quarter. This can be illustrated by 15 Clubs/ Not for Profit organisations whose main income source is membership fees due Quarter 1, January to March.

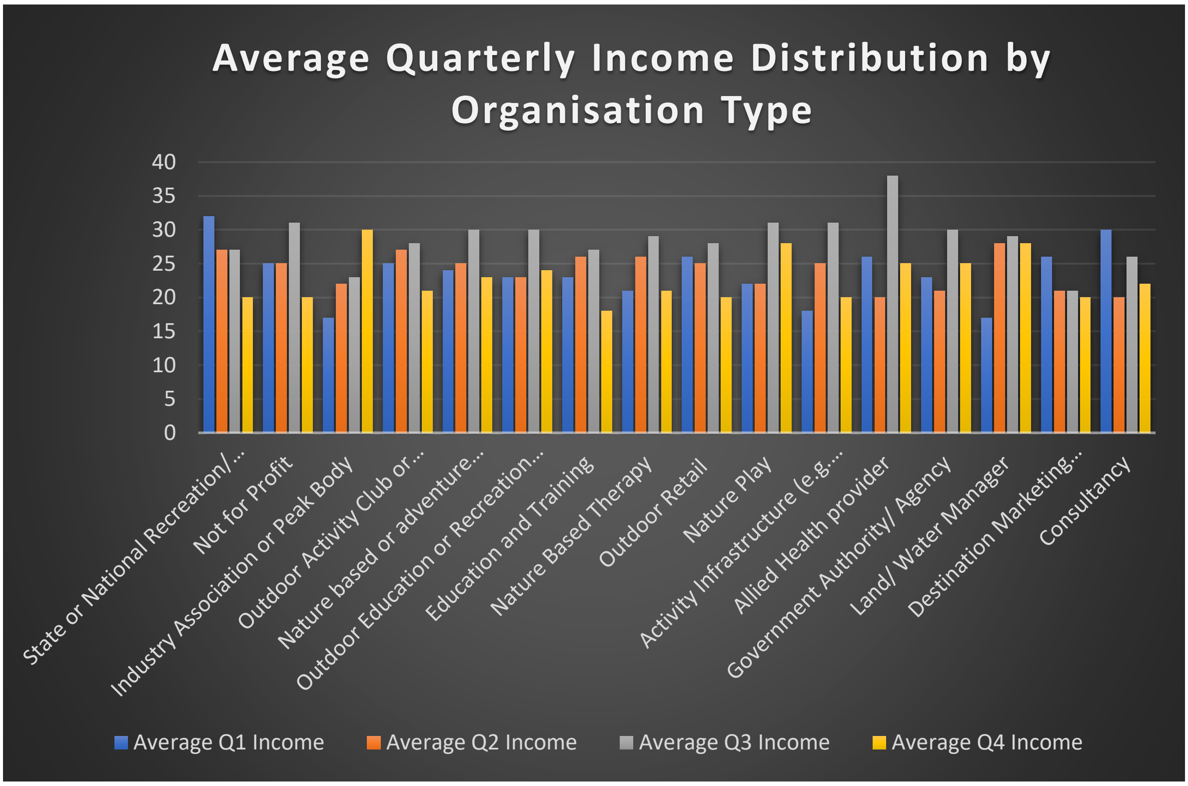
Graph 23: Typical income distribution across financial quarters



There were minimal income distribution differences when average distributions were refined by type of organisation though some patterns were revealed. Industry Associations/ Peak Bodies appear to earn most in Q4 (October-December); and Allied Health Providers earn more than a third of income in Q3 (July- September). Land/ Water Managers receive their least income in Q1 (January- March).

Overall, 13 of the 16 Types of Organisations indicated at least a small peak of income in Q3 (see Graph 23 – grey columns).

Graph 24: Average quarterly income distribution by Organisation Type

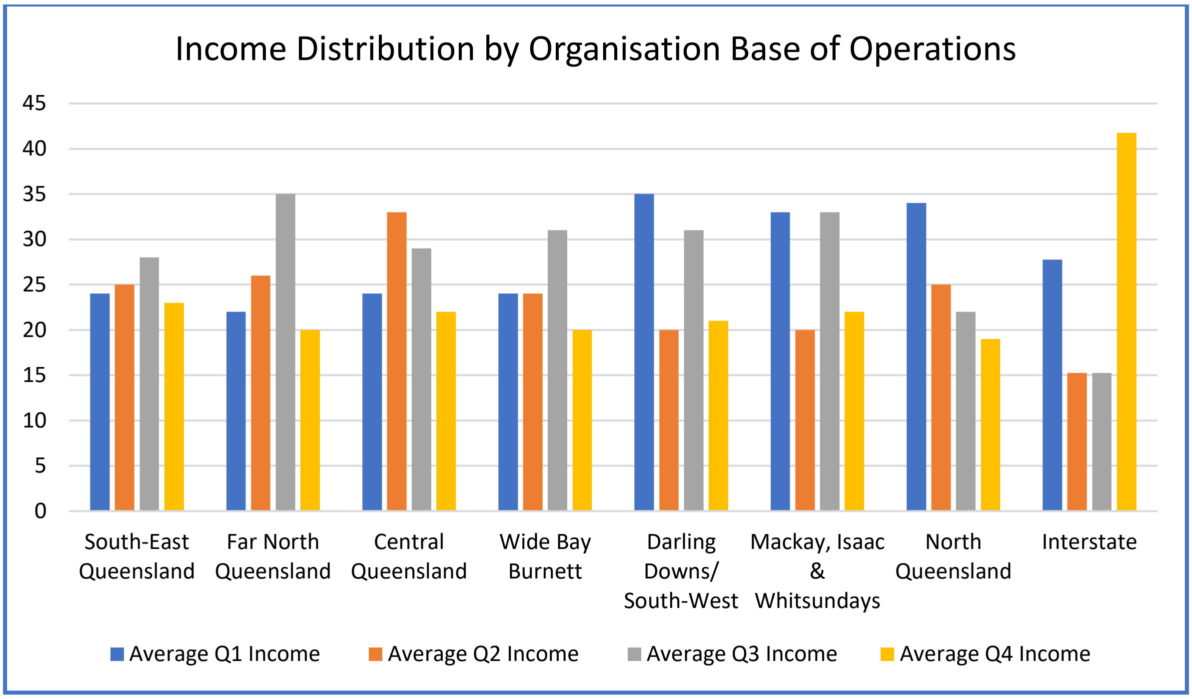


Income distribution becomes more nuanced when examined by organisations' Base of Operations (see Graph 25). When reviewed in this manner outdoor organisations that are based interstate earn the most in Q4 receiving more than 40% of their average income; whereas outdoor organisations in all Queensland regions cumulatively receive their lowest quarterly income in that same quarter (19-23% on average).

Across each region we find:

- **SEQ** organisations are **relatively even in income distribution** across all quarters with a slight drop in Q4;
- **FNQ** is lowest in Q1 and Q4, with a **peak in Q3** (35%);
- **CQ peaks in Q2** and Q3;
- **WBB** is relatively even in Q1 & Q2, **peaks in Q3** (33%) and drop in Q4;
- **DD/SW** is significantly **higher in income in Q1** (35%) and **Q3** (31%) and lowest in Q2 and Q4;
- **Mackay,** Isaac and Whitsundays **peak in Q1** and **Q3** and **substantially lower in Q2** and Q4**;**
- **North Queensland peaks in Q1** (34%) and gradually drops to a low in Q4 (19%); while
- **Interstate** providers earn nearly **70% of their total income in Q4 and Q1**.

Graph 25: Average income distribution by organisations' base of operations



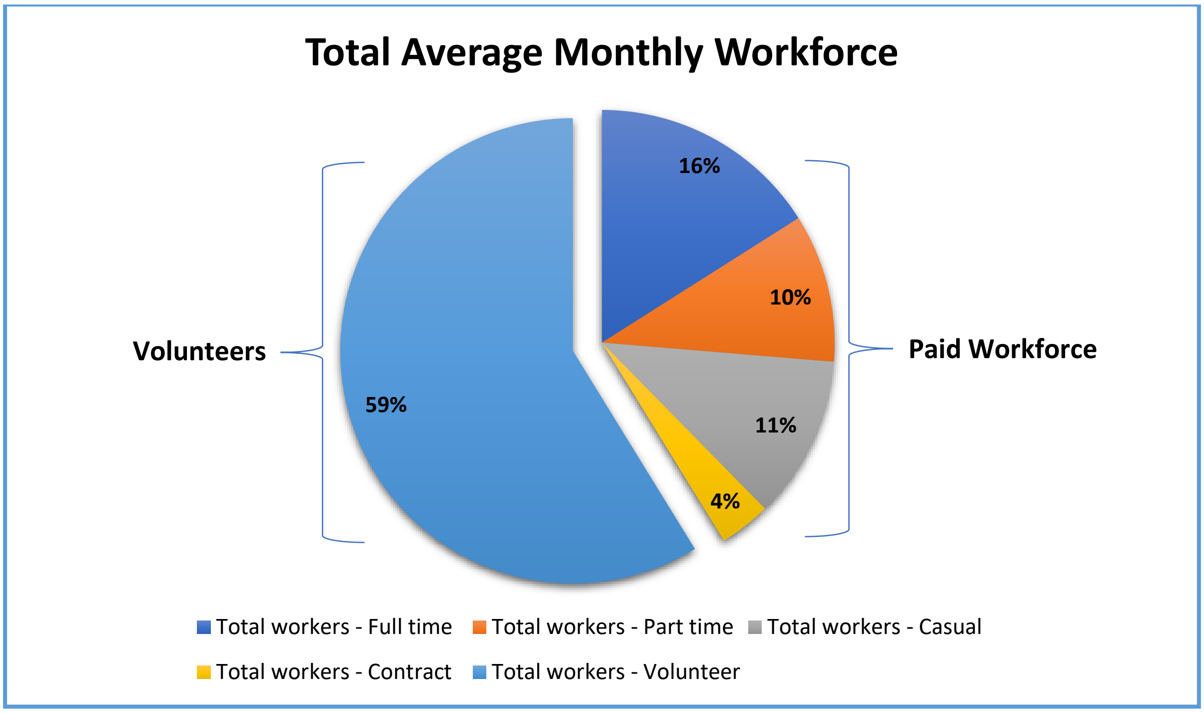
When seasonal and regional variations are considered, these findings make intuitive sense. Organisations based in the most northern region of FNQ tend to earn the greatest percentage of their total income in the cooler quarters (Q2 and Q3); along with organisations based in the dry heat of CQ. There are anomalies with this seasonal explanation as NQ shows greatest income generation in Q1 as do DD/SW and Mackay, Isaac and Whitsundays. For the northern areas this may be a function of a) the smaller number of respondents from those regions and lack of overall representativeness and/or b) the appeal of coastal and water-based opportunities at the end of the long Australian summer holiday period. This hypothesis would require further investigation and comparison across future census.

Workforce Insights

During an average month, Queensland outdoor organisations rely heavily on a volunteer workforce who represent 59% of all identified workers.

The remaining 41% of the workforce is paid but 25% of the total workforce are employed on a Part-time, Casual or Contract basis (see Graph 26).

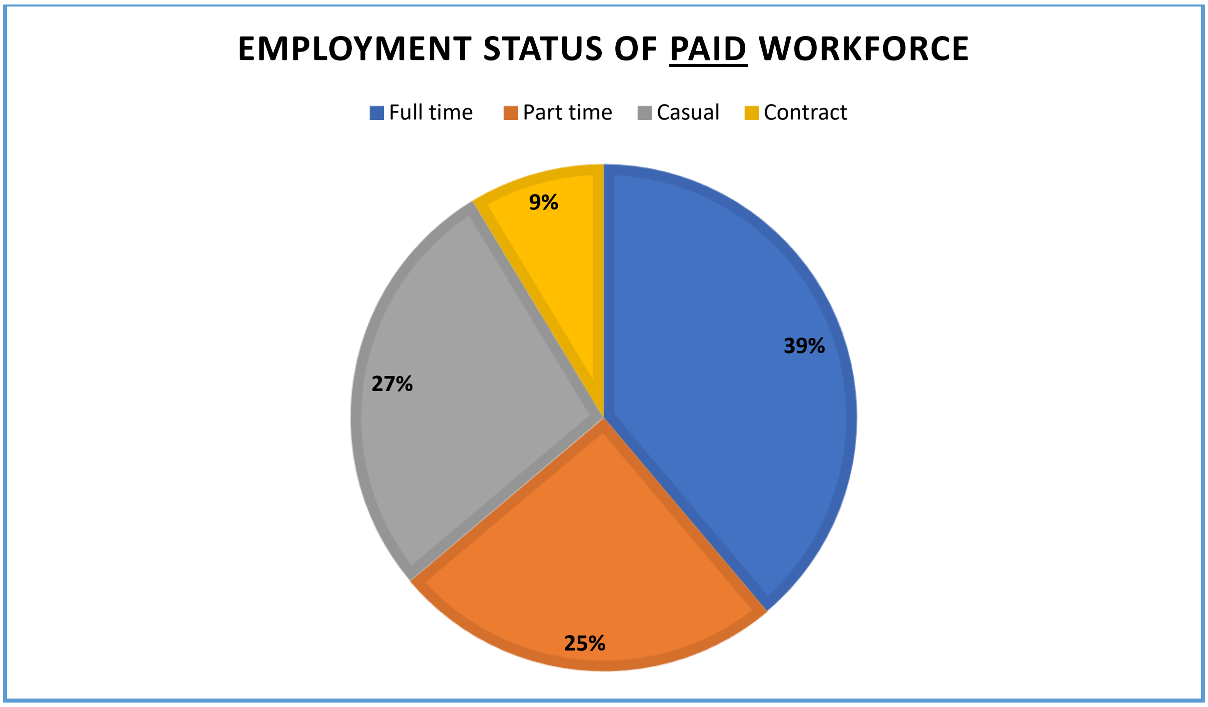
Graph 26: Average Monthly Total Workforce



Survey responses from 280 organisations indicate the outdoor workforce includes at least 4000 paid jobs (41% of identified workers), with 39% of those employed on a Full-Time basis (see Graph 27). To note, this is an underestimation of the paid workforce as these results exclude employees working for non-outdoor focused Government Agencies and City and Shire Council staff[8]; as well as those who did not complete this question.

[8] Prior to removing the non-outdoor focused Government agencies/ councils etc, one organisation accounted for 60% of all paid jobs reported in the survey. This was not deemed truly representative of outdoor or outdoor related staffing in the sector. Further interrogation revealed the question wording did not easily accommodate Government Authority/ Agencies staffing. The reported results do however include the Queensland Government run outdoor activity/ learning Venues and Education Centres, whose figures were verified for outdoor sector employment. It also excludes a handful of large commercial (Tourism and Recreation Venue) outdoor organisations who participated in the census but did not answer this question.

Graph 27: Employment status of the Paid Workforce



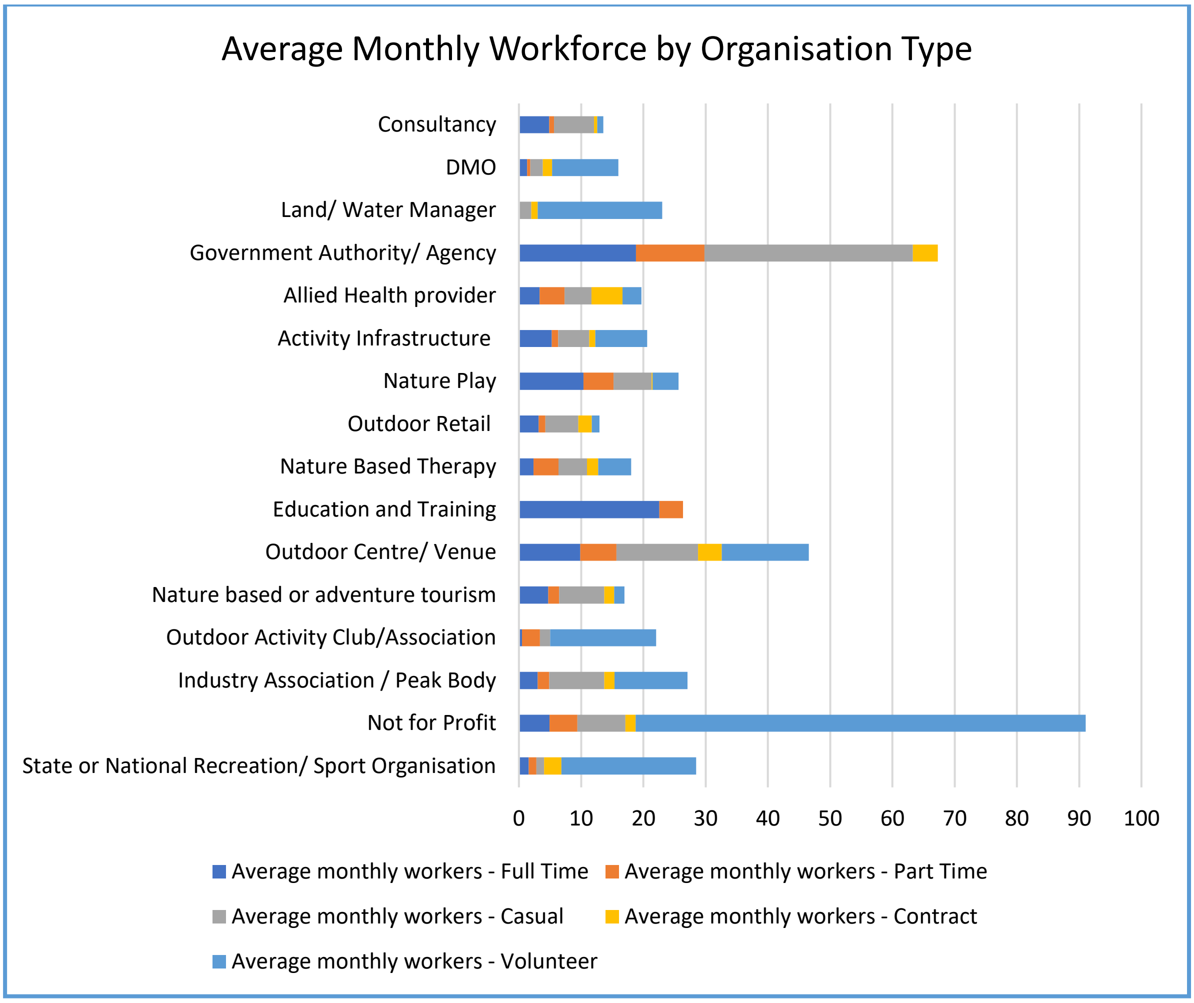
When the employment of workers is considered across different types of organisations the employment status of workers is clearer (See Graph 28). For example:

The Volunteer Workforce

- Volunteers are the dominant workforce for 9 (out of 16) of the Organisation Types.
  - Not for Profits indicate the greatest reliance on volunteers and utilise more than 30 volunteers each in an average month. For youth-based community organisations the number of volunteers reach into the multiple hundreds in an average month.
  - SSO's/ NSO's and Land/Water Managers each average at least 20 volunteers in an average month. Land/ water managers include organisations with trail, environment and bushcare responsibilities.
  - Outdoor Activity Clubs or Associations, Outdoor Centres/ Venues, Industry Peak Bodies and Destination Marketing Organisations, average more than 10 volunteers in a month; with many Activity Clubs relying on anywhere from 30 to 100 volunteers individually.

- Education and Training providers (inc. Schools and Registered Training Organisations), and Government Authorities/ Agencies are the only organisation types who do not indicate using any Volunteers.
  - This finding should be qualified by an understanding that some Government Agencies are also Land/ Water Managers who do work with trained Bushcare and Community volunteers to support the conservation and maintenance of outdoor spaces for participation purposes.

Graph 28: Average monthly workforce across Organisation types



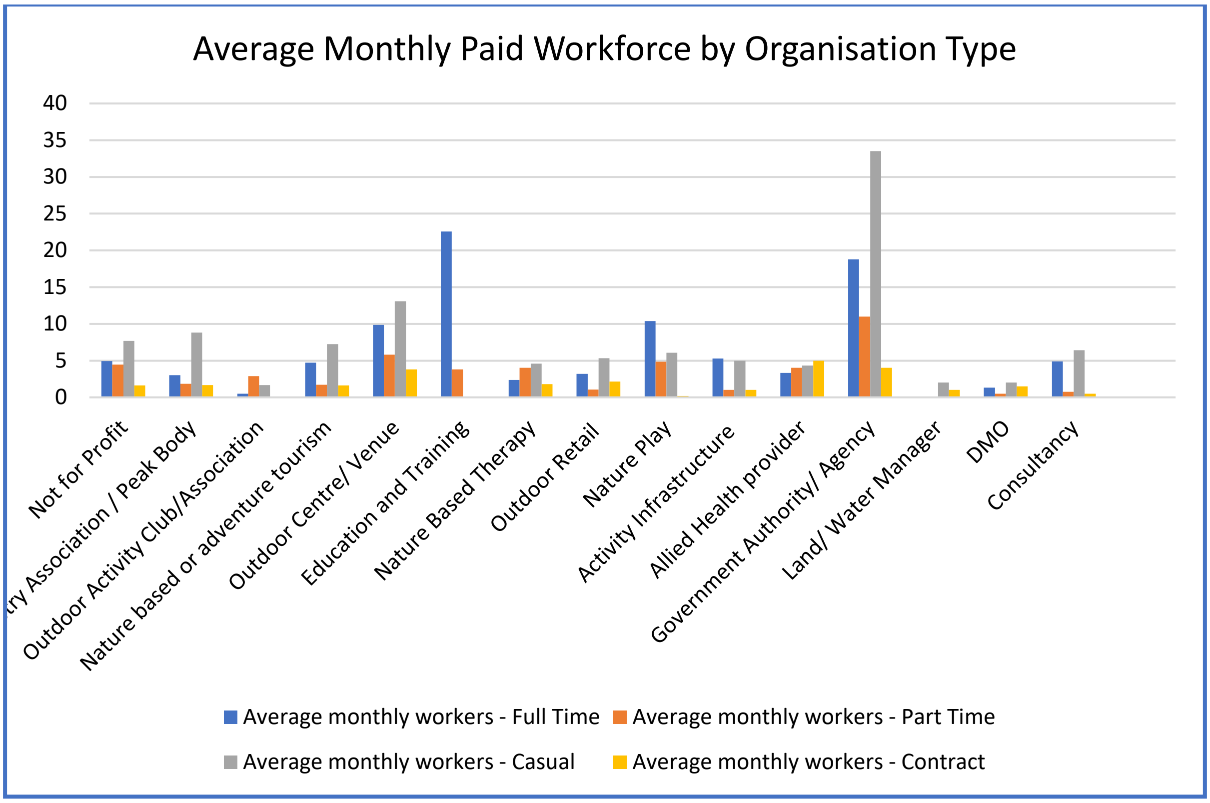
The Paid Workforce (see Graph 29)

- For these representatives of the outdoor sector, Contract work is the least identified employment type showing consistently low averages across different types of organisations.

- The average number of Full-Time staff was significantly higher in organisations that self-identified as Education and Training or Government Authority/ Agency (twice the average number of FT staff than the next highest); followed by Outdoor Education or Recreation Centre/ Venues and Nature Play. The majority of responding organisations represented are government owned or aligned, or commercially operated at scale.

- Part-Time and Casual employment figures are greatest with Government Authority/ Agencies and Outdoor Education or Recreation Venues.

Graph 29: Average monthly paid workforce by Organisation Type



Overall, the greatest number of total workers with more than 45 workers in an average month were found in:

- Not for Profits/ Community Groups.
  - 79% of their workforce works on a Volunteer basis.
- Government Authorities/ Agencies.
  - Unsurprisingly 100% of this workforce is in Paid employment.
- Outdoor Education/ Recreation Centre or Venues.

All other organisation types indicated total average monthly workforces of less than 30 people. Briefly, totals fall between 13/ 14 workers for Outdoor Retail and Consultancies, to 27/28 workers for Industry Associations/ Peak Bodies and SRO/ NRO's.

Key Takeaways

Conservatively, outdoor organisations are delivering, supporting, or facilitating at least 991,791 participants or clients in an average month.

Outdoor organisations service Queenslanders where they live.

Outdoor organisations are most commonly based east of the Great Dividing Range, but their services are not limited to these areas. While some organisations work locally, others service 2 or 3 regional areas or work Statewide.

Outdoor organisations come in all scales. Some are small operations (e.g., self-funded volunteer providers and sole traders). Others are large entities employing numerous staff and reaching deep into communities (e.g., government agencies/ schools; private and public companies). The sector has a mix of not-for-profit community organisations as well as large commercial operators and all iterations in between.

The scope of the sector is diverse and includes:

- organisations that deliver as well as those that support;
- organisations that educate and those that aim to heal;
- organisations that enable access and those that protect;
- organisations that show and share, and those that stretch and challenge;
- organisations that inform and those that advise.

Volunteers are the bedrock of the sector.

Volunteers enable and support access and opportunities, with more than half of respondents indicating volunteers form their largest workforce. But the sector is also grounded in a paid workforce especially in government organisations and commercial operations.

Outdoor Activities and Services are multiple and reflect need, purpose, access, and interest. For example:

- White water rafting is available where the rivers run fast and narrow - in Far North Queensland;
- Surfing is available where the ocean meets the coast – in South-East Queensland;
- Caving is an opportunity in those few Queensland locations where the geomorphology has formed safe access – in Central and Far North Queensland;
- Skydiving is found where the winds are appropriate and an airfield is nearby;
- Commercial activity providers and venues are found where there is a sufficient population to be a viable market.

Learning More – Extending and Building Outdoor Sector Insights

No one census in isolation is sufficient to understand or explain the Outdoor Sector. OQ acknowledge this through their commitment to ongoing Census' delivered in 4-year cycles, and through their intention to use the 2023 inaugural census as a kick-starter to engagement and further interim investigations with the Queensland outdoor sector.

Based on the findings and the process of this census, several options for further research are provided to illustrate how a much richer picture can be built; as well as some suggestions on how to prioritise or set decision making parameters.

Decision Making Parameters for OQ

- How regularly will outdoor organisations be willing to contribute information? (1, 2 or 3 times / year?)
- What types of inquiry-based engagements offer greatest efficiencies or response rate? (e.g., short one or two question polls? Short surveys of no more than 5 questions? Targeted questions on one topic? F2F/ Hybrid Forums?)
- What times of the year are most/ least conducive to sector responsiveness?
- What capacity does OQ have (or need) to analyse, share and respond to data captured?
- How current is the Organisation Contact List? When and how is that being refreshed, refined and quality checked?
- What level of detail and specificity is being sought in the data collection? E.g., general overview; or are there nuanced details that are required?
- What other outreach and support can OQ consistently and periodically offer to build trust, willingness and buy-in from the sector such that they invest their time in sharing information?

Options for Further Research

Sector Views and Perceptions e.g. challenges, opportunities and future strategic directions. These could have a range of foci, such as: planning and integration of outdoor infrastructure, workforce development needs; participation barriers and enablers; 3 – 5-year strategic priorities; compliance challenges; environmental changes and impacts; emerging trends/ innovations; impediments to sector growth; advancing sector and community sustainability etc

Targeted Organisation Predictions e.g. What is your projected revenue for 2025? What services/ organisation types do you think are going to do well over the next 2-5 years? And why? Are you expecting to grow your workforce/ participant numbers/ range of activities etc in the coming year? Etc (NB. Understanding the future state of the sector can help with resource planning/ advocacy).

Community Supported Action e.g. OQ can seek feedback on 2024/ 2025 plans or goals (for example). Having these ranked by outdoor organisations can be a valuable tool on what is important to the sector. OR seek insight into valid priorities or actions around addressing Climate Change and impacts on the outdoor sector.

Expand on Census Questions e.g. For organisations who answered Rarely for different client demographics, are they trying to gain traction with that groups? Would they appreciate support from Outdoors Queensland in targeting Youth (13-17) more? Do they plan or need to grow their paid workforce? How well are they securing and retaining quality volunteers?

Or Extension questions about Annual Financial turnover? Annual Staff turnover? Actual participation numbers for specific services/ activities provided (e.g. how many people did you provide service X to)?

Learn about the History of Organisations. E.g. How old is your organisation? What was your revenue/ workforce size 1 year ago, 5 years ago, 10 years ago etc. (Historical information can help inform trends that can assist with predictions).

Summary

The 2023 Queensland Outdoor Census provides the first detailed breakdown of how the breadth of the Queensland outdoor sector operates, the types of activities and services it provides, an indication of the number of participants or clients being served, and the distribution of services across Queensland.

The Queensland Outdoor Census confirms that Queensland's outdoor sector is represented by five broad sub-sectors namely:

- Outdoor recreation;
- Outdoor and environmental education;
- Outdoor tourism (adventure/nature-based tourism);
- Outdoor health (including adventure therapy); and
- Outdoor services (e.g. land and water management, infrastructure, sector training and development, other support services, retail sales etc).

Outdoor organisations are not necessarily siloed to a single sub-sector. Rather, many organisations operate across sub-sectors and with multiple service provisions and intentions. Thus, the capacity to deliver a single outdoor activity may be offered to provide recreation, education, tourism and health outcomes dependent on the participant and perspective of those involved. Additionally, organisational expertise might be used to inform trail development and land/ water management, to value add through the sharing of environmental interpretation, and/or to actively contribute time to trail care, environmental clean-ups and conservation. While organisations may very well operate only in one area, each sub-sector impact on the others and combined form the breadth of the sector.

The development of a state-wide Contact List and the responses from the Census provide an initial insight into the scope and diversity of services, activities and structures of outdoor organisations operating in Queensland. The findings of this initial iteration of the Queensland Outdoor Census indicate the need for further investigations to confirm and further elucidate the markets the sector is servicing, as well as to understand the unique and shared opportunities and challenges for these organisations now and into the future.

The need for this work to continue is obvious when we consider that:

- The current list of outdoor organisations is a start point, not a destination, with so many more organisations integral and aligned with the sector;
- With climate changing, resources reducing, populations ageing, and an ever-increasing range of competing options for people's time, money and energies, the Outdoor Sector will need to continue to adapt, innovate and evolve.

If the sector is to sustain relevance and affordability and be effectively visible; it needs to be counted to build recognition and cement its individual, communal and social value.

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Reference

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Appendix One: Outdoor Census Project Outline

Project outline: Queensland Outdoor Census

The Queensland Outdoor Census will deliver a dramatically improved understanding of the scale of the Queensland active outdoor industry through a comprehensive analysis of outdoor organisations.

Objective: Outdoors Queensland wants to better understand the Queensland outdoor sector

Why?

- So we have a realistic understanding of the outdoor sector based on data
- So we can better service the needs of outdoor organisations
- So we can assist decision-makers to be better informed regarding outdoor activities
- So Outdoors Queensland can increase organisational membership and associated revenue, increasing financial sustainability

Outcomes	Outputs
Better understanding over time of scope and range of outdoor organisations for Outdoors Queensland and Queensland government	Clearer picture of outdoor providers: - Number, type and size of organisations - Average financial turnover - Number of workers (paid/volunteer) - Number of members/customers/participants per year - Number of hours/days of outdoor activities delivered per year - Locations where operations are taking place - Types of outdoor activities being delivered
Increased capability for Queensland government to develop programs that meet needs of outdoor providers	Targeted programs/services based on data and understanding
Increased financial sustainability for Outdoors Queensland	Conversion of more outdoor organisations to membership = increased membership revenue
Improved capability for Outdoors Queensland to service members	Targeted services based on clearer understanding and data, leading to member retention
Improved understanding for decision-makers of services provided by outdoor organisations	- Summary of data in accessible format - Gather further data over time to understand trends

Context

A wide range of organisations across Queensland are involved in outdoor activities. Some organisations serve only their members, some target the general public, and others deliver to both members and other customers. Reasons for participation in outdoor experience vary from outdoor recreation, outdoor education, adventure tourism and adventure therapy (and may include a combination of these).

The Queensland Government provides services and develops grant programs to assist the active industry (comprised of active recreation, sport and fitness organisations), however there are gaps in knowledge of the active recreation space. A clearer understanding would help ensure that government services and programs best enable the active recreation industry to deliver outcomes aligned to government direction.

Outdoors Queensland is the peak body responsible for outdoor activities in our state, however does not have access to a reliable estimate of the number of outdoor providers in our state or a clear picture of the scope and range of outdoor activities.

Outdoors Queensland is a member-based organisation that has been operating since 1996, but does not have an accurate understanding of its potential organisational members. Note – while Outdoors Queensland has both organisational and individual members, and individual members are important supporters of the organisation, the focus of the Queensland Outdoor Census is on potential organisational members.

The Queensland Outdoor Census will be a comprehensive analysis of outdoor organisations. Gathering data from as many relevant organisations as possible will lead to increased awareness of Outdoors Queensland. It will also position Outdoors Queensland to conduct further qualitative surveys outside of the census, where questions could be asked regarding goals, operations and issues affecting ability to achieve goals.

An important element of the project is the development of a comprehensive Customer Relationship Management database, which could be incorporated into the Outdoors Queensland website. This CRM will allow Outdoors Queensland to engage in a meaningful manner with the expanded database of outdoor organisations.

The Census created by this project will be able to be repeated into the future. The Census is proposed to be conducted every four years (in 2023, 2027, 2031, 2035). Installing replicability from the outset allows for data to be updated in future years, so that trends analysis can be performed. Subsequent iterations of the census will provide layers of information and will help illustrate the status of the outdoor sector and patterns over time.

The methods and processes that will be used to conduct the Census will be established as part of the project. This will involve identifying and trialling methods, gathering data, and analysis/reporting. The data collection instruments and protocols will enable the Census to become a standard part of Outdoors Queensland's operations into the future.

This Census could be replicated by governments or peak body organisations in other Australian jurisdictions, potentially creating a national picture that will allow Queensland's outdoor industry to be bench-marked against other states and territories. That will be particularly relevant in the lead up to Brisbane 2032 Olympic/Paralympic Games, and in the years immediately following Brisbane 2032.

Appendix Two: Main Census Distribution Partners

Partner Organisation	Core Outreach	Distribution Support
DTIS – Sport and Recreation Regional Offices	Sport and recreation providers in each region who have applied for funding or utilise the support services of the Regional Offices.	DTIS Central Office coordinated mail out to each Regional Office, including a call to further promote through regional connections with LGA's (see below). Follow up nudge sent.
QTIC	Engagement with Regional Tourism Organisations (RTOs)/ DMO's (see below). Peak Body and Association data bases of QTIC's Associations Members.	QTIC coordinated mail out of promotional information to: QTIC Associations Council and each RTO/ DMO. Follow up nudge sent.
Regional Tourism Organisations/ **Destination Management Organisations**	Self-defined. Nature and adventure-based tourism operators and providers in each regional area.	Various. Regional communications included: direct e-communication, embedded in standard newsletter.
LGA's	LGA's invited through DTIS Regional Offices to promote to their sport/ recreation/ tourism outdoor sector providers, suppliers, stakeholders (self-defined).	Various distribution – regionally determined.