

# 2023 Outdoors Queensland Member Survey



## Executive Summary

The 2023 Outdoors Queensland Member Survey was conducted during November and December 2023. This survey expanded on the results of the Queensland Outdoor Census, conducted in mid-2023.

The Queensland Outdoor Census was focussed on facts about Queensland's outdoor organisations – how many organisations, where they are based, what they do, where they do it, who do they serve, and how many workers (paid and volunteer) are involved.

The 2023 Outdoors Queensland Member Survey focussed on opportunities and issues for organisations and the outdoor sector generally.

Respondents to the survey strongly indicated that their organisation's services are needed, and their clients/members are engaged. The key issue causing pain and concern for organisations is staffing/workers, especially suitable skilled workers.

When asked to rank a list of ways to help Queensland's outdoor sector grow, the following tactics ranked most highly:

- Promoting the lifestyle and health benefits,
- Emphasising differences from traditional sport, and
- Positive mainstream media stories.

When asked about the single, largest opportunity for outdoor activities in Queensland, the strongest theme from responses was Queensland's environment, weather, climate and nature are the greatest asset and opportunity.

When asked about the core roles Outdoors Queensland should focus on, the strongest responses were:

- Advocating for the outdoor sector and access to places
- Networking for members/stakeholders, and
- Communications/marketing/sharing information.

When asked what would help build better organisational capacity, the most popular answers were networking opportunities, resources to assist with attraction/retention of workers (paid and volunteer), information about possible revenue sources, and assistance with policies and procedure reviews.

Outdoors Queensland is grateful to all who contributed to the 2023 Outdoors Queensland member survey. The results of this process will help shape future services offered by Outdoors Queensland.

## Background and methodology

During November and December 2023, Outdoors Queensland surveyed available directors of Outdoors Queensland and representatives of our member organisations to obtain a deeper understanding of opportunities and issues in providing, servicing and delivering outdoor activities to our communities.

Outdoors Queensland (formerly known as Queensland Outdoor Recreation Federation or QORF) has served as the industry peak body for the outdoor sector of Queensland since its formation in 1996.

Our organisation has conducted several surveys of our members over the years<sup>1</sup>.

Our most recent previous member survey was conducted in May 2020 and was aimed at assessing the early impacts of COVID-19 on our members. This 2023 survey was about the sector as a whole – opportunities and issues, and how Outdoors Queensland might be able to assist.

In 2023, it is considered that the Queensland outdoor sector is comprised of organisations from five broad areas<sup>2</sup>:

1. Outdoor health,
2. Nature-based tourism,
3. Outdoor education,
4. Outdoor recreation,
5. Support services to the outdoor sector.

Outdoors Queensland staff selected and invited member organisations from these five subsectors to participate in the 2023 member survey.

The survey respondents are directors of Outdoors Queensland and financial members of Outdoors Queensland; they represent small and large organisations; come from government agencies, for-profit businesses and non-profit organisations; are located in different regions of Queensland; and deliver a wide range of services across the Queensland outdoor sector.

Twenty-two (22) interviews were conducted by Outdoors Queensland staff, either via video call or by telephone, using a set questionnaire. The interviews ranged in duration from 30 minutes to around an hour.

Having Outdoors Queensland staff conduct these interviews presented both pros and cons. This option had potential to influence answers provided by respondents (which may have been different if an independent interviewer had been used), however it also was a cost-effective option that allowed staff to build rapport with member representatives and deepen understanding of outdoor organisations served by Outdoors Queensland.

The questions and introductory information were provided to the survey participants in advance of their interview to allow time to prepare. Some people

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<sup>1</sup> Reports available online - <https://outdoorsqueensland.com.au/industry/research-master/member-surveys/>

<sup>2</sup> Source – 2023 Queensland Outdoor Census, report available at <https://outdoorsqueensland.com.au/queensland-outdoor-census/>

were unable to answer particular questions, however most survey respondents answered every question.

The first set of questions (Questions 1 to 5) were focused on the organisation that the person represents. These were followed by a group of questions about the outdoor sector in general (Questions 6 and 7) and questions about Outdoors Queensland's role/services (Questions 8 to 10). The next series of questions (Questions 11 to 15) focused on the relationship between the member organisation and Outdoors Queensland. The final question (Question 16) allowed the survey respondent to provide any information that had not been discussed.

For some questions, the respondents were asked to choose from pre-populated answers with options to select "Other" and provide more detail, while for other questions respondents were asked to answer the question in their own words. Outdoors Queensland staff later grouped those answers into general themes for analysis.

We are grateful to all who participated in the 2023 Outdoors Queensland Member Survey. We appreciate the time, thought and effort from all involved.

Some members who were approached were unable to participate in the process at the time it was being conducted. Where possible, an alternative member with a similar type of organisation was substituted for a member who was not available.

# Summary of Responses

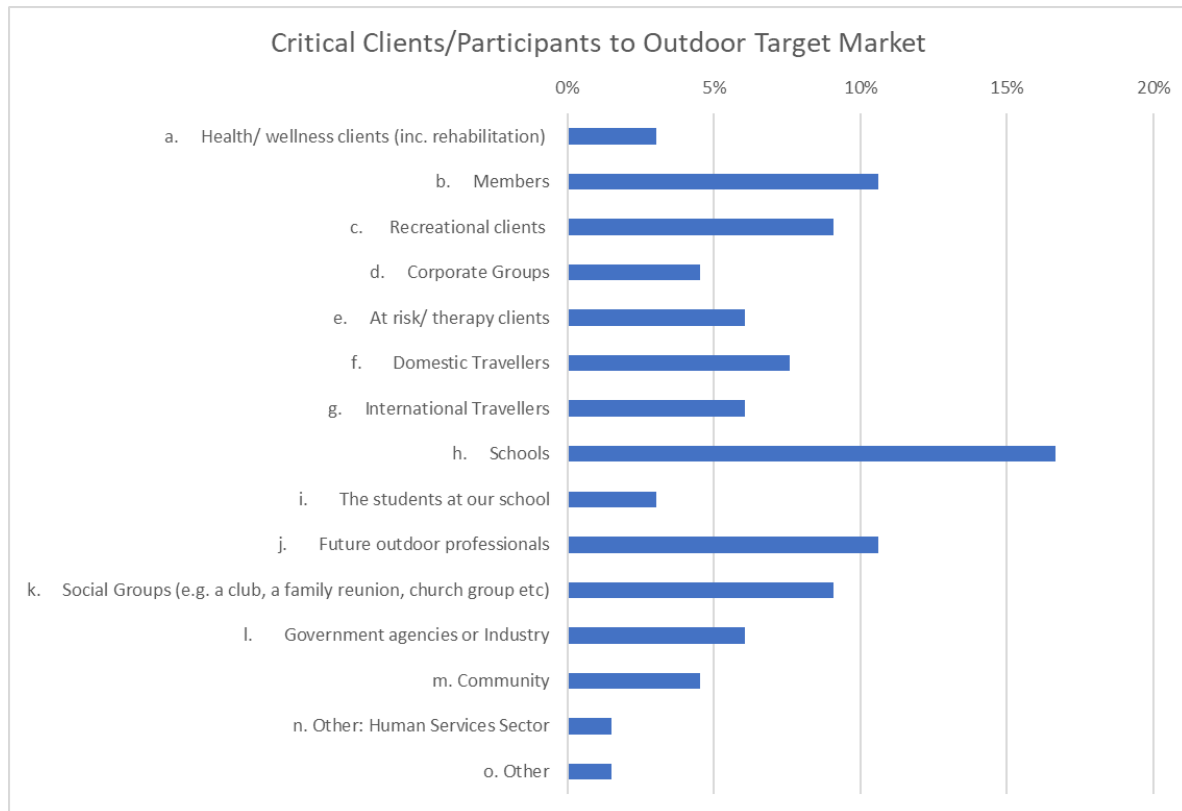
In Question 1, respondents were asked to describe the main services, experiences or activities provided by their organisation – they could select multiple answers from a list provided and could add other answers if necessary.

There was a great deal of variety, with the most popular options being school camps (13%), sector development/consultancy (11%), education on or through the outdoors (8%), leader/sector training (8%), and outdoor activity infrastructure (design, build, maintenance) (8%).



In Question 2, respondents were asked about the clients/participants who were critical to their target market – they could select more than one answer, and could add other answers if necessary.

At 17%, schools were the most popular response (which aligns with responses to Question 1), followed by members (11%), future outdoor professional (11%), recreational clients (9%), social groups (9%) and domestic travellers (8%).



Question 3a asked about the biggest opportunity for the respondent's organisation over the next 12 to 24 months. This question resulted in a wide variety of responses, ranging from developing new off-shoot businesses, increasing visibility to drive bookings, diversifying offerings, attracting new members, more collaboration and partnerships, capitalising on growth in the outdoor sector, and being ready to meet emerging trends.

Question 3b asked respondents to rank what might help make the opportunity identified in Q3a more achievable from the following list:

- Time – being able to prioritise time on this opportunity
- Treasure – money and people
- Talent – skills, knowledge, education, training
- Teamwork – collaboration and partnerships
- Other

The highest ranked response was “Treasure – money and people”, followed by “Teamwork – collaboration and partnerships”, “Talent – skills, knowledge, education, training”, “Time – being able to prioritise time on this opportunity”, and then “Other”.

Outdoors Queensland can assist members obtain Treasure (money and people) by promoting grant opportunities and linking organisations with workers. We are well-placed to assist our members in the Teamwork and Talent categories, which ranked second and third in the priorities. We cannot create more Time for our members, but we may be able to assist members with prioritising how they use their available time.

Question 4 asked about issues, competing positive factors, and impacts of a range of factors on the surveyed organisations.

Question 4a asked what causes the most pain or keeps you up at night as far as your organisation is concerned. Staffing/workers especially suitable skilled workers was the highest response (36%), followed by Other factors preventing focus on outdoor activities (16%) and Resourcing – money (12%).

Question 4b asked what helps people sleep soundly and what is the competing positive factor keeping them engaged in their organisations. Need for the services and that clients/members are engaged was the strongest response (42%), followed by Making a difference (25%), and Support from other staff/management (13%).

Question 4c asked respondents to rate the impact of selected factors on their organisations.

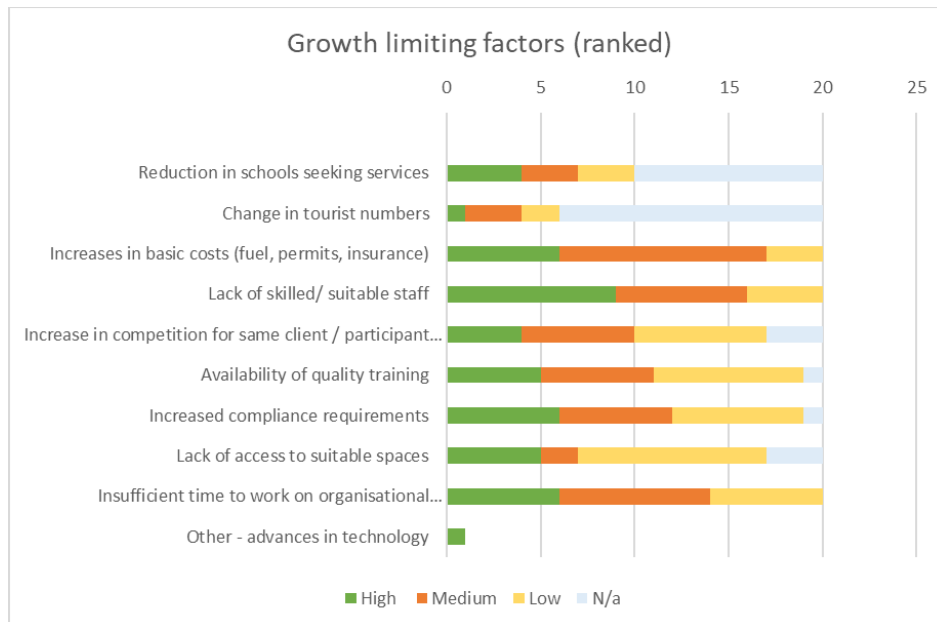
The factors with the highest ratings were:

- Lack of skilled/suitable workers,
- Increases in basic costs,
- Increased compliance requirements, and
- Insufficient time to work on organisational development.

The factors with the lowest ratings were:

- Lack of access to suitable spaces,
- Availability of quality training,
- Increase in competition for same client/participant base, and
- Increased compliance requirements.

Note – “Increased compliance requirements” appears in lists of both highest rating and lowest rating, possibly indicating different pressures being experienced by different types of organisations.



Question 5 asked what would help build better organisational capacity. The most popular responses to this question were:

- Networking opportunities (20%),
- Resources to assist with attraction/retention of workers - paid and volunteer (16%)
- Information about possible revenue sources (16%), and
- Assistance with policies and procedure reviews (12%).



Question 6 asked respondents to rate in order of priority a list of possible ways to help the outdoor sector grow. The most popular responses were:

- Promoting the lifestyle and health benefits,
- Emphasising differences from traditional sport, and
- Positive mainstream media stories.

Question 7 asked about the single, largest opportunity for outdoor activities in Queensland. The strongest theme from responses was that Queensland's environment, weather, climate and nature are our greatest asset and opportunity.

Question 8 asked about the core roles Outdoors Queensland should focus on. The strongest responses were:

- Advocating for the outdoor sector and access to places
- Networking for members/stakeholders, and
- Communications/marketing/sharing information

Several people also flagged incident response assistance and research as themes seen as core roles for Outdoors Queensland.

Question 9 asked about what topics would be of most interest for possible training sessions to be delivered by Outdoors Queensland. Responses to this question were quite varied, however the following received the most mentions:

- Risk Management including Australian Adventure Activity Standard and Good Practice Guides
- Business tips, including employment practice
- Marketing and social media training, and
- Land management, including Indigenous Cultural Heritage.

Question 10 asked specifically about whether respondents thought it would be useful if Outdoors Queensland offered to review policies/procedures. Most responses to this were very positive.

Questions 11 to 15 were focussed on the relationship between the member and Outdoors Queensland and specific Outdoors Queensland offerings. Responses to these questions are not summarised here, however those responses will be considered by Outdoors Queensland when making future operational decisions.

Question 16 invited respondents to provide any further comments. The most popular response to this question was that Outdoors Queensland should keep doing what it is doing and gratitude for the work done by Outdoors Queensland.

## Conclusion and Next Steps

The 2023 Outdoors Queensland Member Survey expanded on the results of the Queensland Outdoor Census, conducted in mid-2023.

The Queensland Outdoor Census was focussed on facts about Queensland's outdoor organisations – how many organisations, where they are based, what they do, where they do it, who do they serve, and how many workers (paid and volunteer) are involved.

The 2023 Outdoors Queensland Member Survey focussed on opportunities and issues for organisations and the outdoor sector generally.

This survey confirmed that staffing/worker availability (particularly skilled workers) continues to be the most pressing issue for many outdoor organisations. It also confirmed that outdoor organisations realise their products/services are needed and appreciated by their members/clients.

When asked what would help build better organisational capacity, the most popular answers were networking opportunities, resources to assist with attraction/retention of workers (paid and volunteer), information about possible revenue sources, and assistance with policies and procedure reviews.

When asked about the core roles Outdoors Queensland should focus on, the strongest responses were:

- Advocating for the outdoor sector and access to places
- Networking for members/stakeholders, and
- Communications/marketing/sharing information.

Outdoors Queensland will take this feedback on board as we plan for delivery of services in 2024 and beyond.

Respondents considered the following tactics as most important to help the Queensland outdoor sector to grow:

- Promoting the lifestyle and health benefits,
- Emphasising differences from traditional sport, and
- Positive mainstream media stories.

Outdoors Queensland can work on these tactics, however to achieve real progress, these topics will require contributions from outdoor organisations of all types across the state. Outdoors Queensland may be able to provide resources to the outdoor sector to promote lifestyle/health benefits of outdoor activities. We can help organisations to differentiate themselves from traditional sports clubs, and we can assist with crafting and obtaining positive media coverage.

When asked about the single, largest opportunity for outdoor activities in Queensland, the strongest theme from responses was Queensland's environment, weather, climate and nature are the greatest asset and opportunity. Outdoors Queensland believes that all people should have opportunities to make connections to Queensland's outdoors.

# Appendix 1 – Member Survey 2023

## Member Survey 2023

Thank you for agreeing to take part in the Outdoors Queensland Member Survey 2023



Why are we doing a survey?

- It is important that we know and understand what is happening in your world of providing, servicing and delivering outdoor opportunities to our communities.
- The information we gather will give a better insight into the current state of Queensland's outdoor sector and enable us to be a much stronger and more effective voice as we advocate on behalf of the sector.
- This information will help us improve our services to you and the outdoor sector.

Please note that while the information you share with us will be included in our analysis and final report, your details will remain confidential.

Please read through the following questions and take a little time to consider your answers. This will help the interview run more efficiently and take up less of your day.

### Questions

#### Tell us about your organisation?

1. How do you describe the main services, experiences or activities your organisation provides? Select one or more.
  - a. Guided tours
  - b. Outdoor Equipment hire/ sales
  - c. Education in or through the outdoors
  - d. School camps
  - e. Provision of recreational space
  - f. Provision of recreational experiences (inc. outdoor play, club activities)
  - g. Provision of sport/ recreation competition/ events
  - h. Participant instruction (e.g. Learn to ... dive, 4WD etc)
  - i. Health/ wellbeing support (inc. mental, physical health support services)
  - j. Leader/ Sector training
  - k. First Aid/ Rescue training
  - l. Outdoor activity infrastructure (design, build, maintenance)
  - m. Sector development/ Consultancy
  - n. Other: \_\_\_\_\_

2. What clients/ participants are critical to your outdoor target market?

Select one or more.

- a. Health/ wellness clients (inc. rehabilitation)
- b. Members
- c. Recreational clients
- d. Corporate Groups
- e. At risk/ therapy clients
- f. Domestic Travellers
- g. International Travellers
- h. Schools
- i. The students at our school
- j. Future outdoor leaders/professionals
- k. Social Groups (e.g. a club, a family reunion, church group etc)
- l. Government agencies or Industry
- m. Other (please specify) \_\_\_\_\_

3. Opportunities - We all have activities and practices that we could pursue, but we may not be ready for various reasons.

a. What do you see as the biggest opportunity for your organisation in the next 12 to 24 months?

b. What resources might help make that opportunity more achievable?

Number these in order of priority from 1 to 5, with 1 being the most important.

Do you have any other priorities that are not on this list already?

| 1 -5 | Statement  |
|------|--|
|      | Time – being able to prioritise time on this opportunity |
|      | Treasure – money and people                              |
|      | Talent – skills, knowledge, education, training          |
|      | Teamwork – collaboration and partnerships                |
|      | Other  |

4. There may be factors limiting growth in your organisation.

a. What causes you the most pain or keeps you up at night as far as your organisation is concerned?

b. What helps you to sleep soundly? What is the competing positive factor that keeps you engaged in your organisation?

c. Please rate the impact of the following on your organisation:

| Factor   | High Impact | Medium Impact | Low Impact | N/A |
|--|-------------|---------------|------------|-----|
| Reduction in schools seeking services                        |             |               |            |     |
| Change in tourist numbers                                    |             |               |            |     |
| Increases in basic costs (fuel, permits, insurance)          |             |               |            |     |
| Lack of skilled/ suitable staff                              |             |               |            |     |
| Increase in competition for same client / participation base |             |               |            |     |
| Availability of quality training                             |             |               |            |     |
| Increased compliance requirements                            |             |               |            |     |
| Lack of access to suitable spaces                            |             |               |            |     |
| Insufficient time to work on organisational development      |             |               |            |     |
| Other  |             |               |            |     |

5. Thinking about developing your organisation, what would help you to build better organisational capacity? Choose as many as apply:
- A. Resources to assist with attraction/retention of workers (paid and volunteer)
  - B. Volunteer development opportunities
  - C. Assistance with policies and procedure reviews
  - D. Resources regarding responsible access to outdoor spaces
  - E. Training focussed on inclusive practices for all people
  - F. Mentoring program
  - G. Access to specialist service providers
  - H. Networking opportunities
  - I. Information about possible revenue sources
  - J. Other \_\_\_\_\_ [provide detail]

### Sector Wide Opportunities

6. Which of the following do you believe would help the outdoor sector grow?

Number these in order of priority from 1 to 10, with 1 being the most important.

Do you have any other priorities that are not on this list already?

| 1 - 10 | Statement   |
|--------|---|
|        | Positive mainstream media stories                                 |
|        | More mass participation events                                    |
|        | Increased number of outdoor venues/infrastructure close to        |
|        | Increase in retail sales of outdoor gear                          |
|        | Targeting activities to niche markets (e.g. millennials, seniors) |
|        | Promoting the lifestyle, health benefits                          |
|        | Recognising our similarities and effectively collaborating        |
|        | Capturing youth participation to encourage family participation   |
|        | Emphasising differences from traditional 'sport'                  |
|        | Other:  |

7. We live in a dynamic world. What do you think is the single, largest opportunity for outdoor activities in Queensland? Why?

### About Outdoors Queensland

8. Outdoors Queensland aims to support the outdoors sector and encourage greater participation. What core roles do you believe Outdoors Queensland should focus on?
9. If Outdoors Queensland were to run a series of online training sessions, what topics would be most useful to you?
10. If Outdoors Queensland were to offer to review your policies and procedures – would you be interested, would that be useful? (Admin, Human Resources, public relations, marketing/social media, safety (AAAS), Health & safety ... )

### Outdoors Queensland and you!

11. Why did your organisation decide to become an Outdoors Queensland member?
12. Every month we send you our eNewsletter
- Do you read it?
  - Do you share it with your staff, Boards, colleagues, clients ...

- c. Do you know that you can send us articles, adverts and other material we could include?
13. Have you taken a good look at the Outdoors Queensland website?
- d. What pages / sections are most useful to you?
  - e. What information could we add that would be useful to you?
  - f. Would you use a member portal that required you to log in to access additional information/resources?
14. Social media
- g. Do you use social media to help promote, sell your organisation (or other)
  - h. Do you engage via Outdoors Queensland's social media?
  - i. Do you follow us?
15. Do you know about / have you used / do you have any feedback on the following Outdoors Queensland offerings:
- o the new member referral & rebate scheme
  - o Shop
  - o What's On – event calendar
  - o Sharing events and news items
  - o Job Board
  - o Coffee & Conversation
16. Is there anything else you want to share with Outdoors Queensland?