

Completed in partnership with



## National Outdoor Sector Survey 2010

*Quantifying the outdoor workforce*



November 2011

**National Outdoor Sector Survey 2010  
(NOSS10)**

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## Summary of recommendations

### *Greater clarity in defining, categorising and communicating ideas*

The ‘outdoor sector’ is a relatively new concept as uncovered through NOSS10. It does not directly align with existing statistical collections and the full extent of its coverage is still being uncovered. As such, one important outcome of this project is the **need to explore and better understand the complexity** of the outdoor sector (e.g. sole traders, volunteers, university-based RTOs, etc.) so that it may be communicated for future endeavours in an easy-to-understand manner.

### *Clearly communicating data needs and data limitations*

Though much thought had gone into the design of NOSS10, there were some unavoidable and unforeseen limitations that impacted on the quality of data received—this is often the terrain of new research areas. Consequently, the results of NOSS10 presented in this paper are exploratory and not representative. Even so, NOSS10 has provided OCA and SSA with a valuable set of insights and experiences that will serve to establish a strong foundation for future research projects of this kind.

One of the most significant lessons learned to carry forward are to **develop (and, subsequently, communicate to others) an awareness of the constraints** embodied by the data collection approach that has been adopted. For this project, SSA has attached a Quality Declaration Framework—as developed by the ABS—to assist in this process. Furthermore, in adding these data to the landscape of existing information pertaining to the outdoor sector, it is recommended that the OCA reassess its data needs for the future and how such information may be collected via a longitudinal research instrument.

### *Strategic planning to enhance industry ownership and project outcomes*

Ideally, an ultimate result of this first study will be an enhanced ability to better communicate with the various industries involved. This would create a sense of unity that may potentially bind these parties together for years to come, and not just for future iterations of this project. In order to achieve this goal, several new approaches—many of which appear to be relatively straightforward—will need to be adopted.

The most fundamental of these changes will be to establish a **central agency responsible for the ongoing management of a national outdoor sector contacts database**. This will facilitate enhanced and timely communication with stakeholders as well as remove the obstacle created by duplicate responses and the associated data management resources this issue demands. However, in order to be adopted across the board, this list may also need to be for research purposes only. Another important consideration following on from this move is to design and establish a longitudinal quantitative data collection mechanism in the form of an “administrative by-product”.

### *Refining the instrument and identifying areas for further research*

Regardless of the data collection process adopted for measuring the outdoor sector in the future (i.e. census, sample survey or administrative by-product), it is vital to first **reassess the data needs—both in terms of data quality and the additional information sought**. Some suggestions for further research include addressing workforce mobility (e.g. across states/territories and internationally) as well as attempting to measure the prevalence of formal skills sets (e.g. those recognised in the current outdoor recreation training package). These areas may be of great interest and relevance to the outdoor sectors and could, therefore, be potentially included as additional topics of research before re-embarking on this exercise or attempting to create a longitudinal measure.

Moreover, there may also be a need to seek further clarification on some aspects of the outdoor sector and its individual organisations through qualitative research (e.g. focus groups, interviews, workshops, etc.). The most efficient means of performing this activity may be to delegate this phase of the research to the most appropriate bodies in each state and territory. This will, however, require each body to be provided with a strict briefing on regarding data collection and desired outcomes.

### *Improving engagement with the significant cohort of volunteers*

One of the key findings from the survey results was the important role fulfilled by volunteers in the outdoor sector. Based on present data, the outdoor sector receives one volunteer involvement for approximately every five paid involvements (i.e. a ratio of 1:5)—this is, however, considered to be a significant under-calculation. In addition, responding organisations anticipated that staffing requirements for the next five years would rely on greater numbers of volunteers than on paid staff. In contrast, results for other questions show the following:

- A distinct lack of awareness regarding the number of volunteers utilised by the organisation versus the number of paid staff (see questions 14 and 23).
- A considerable lack of investment in the training and development of volunteers who provided their services to the organisation (see questions 20 and 29).
- A substantial lack of knowledge regarding the qualifications held by volunteers who provided their services to the organisation (see questions 21 and 30).

Although other results from this survey do not indicate volunteer tenure or turnover is an immediate concern, the points above highlight the potential to **better integrate volunteers into the outdoor sector workforce through improved volunteer management practices**. As argued in a recent paper, regardless of the capacity in which a person is providing their services (paid or unpaid), the skills required to fulfil the duties and expected outcomes of a given role still need to be of the same quality or standard.<sup>1</sup>

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<sup>1</sup> SSA, “Not Just a Volunteer: Embracing concepts and approaches from the paid sector”, prepared and presented by A. Pleffer at 13<sup>th</sup> National Conference on Volunteering, Volunteering Australia, 2010, p.2.

*Building on the momentum achieved for maximum benefit*

While NOSS10 was able to capitalise on impromptu resources made available to conduct a one-off exploratory questionnaire, this approach has since been revisited and refined in order to **better articulate the outdoor sector in the future** (particularly for the purposes of attracting funded training). For this to occur in a sustained fashion, it is recommended that NOSS12 and beyond:

- operate under a continued partnership between OCA and SSA
- focus on generating workforce data of a longitudinal nature
- are conducted on a biennial basis following the end of financial year
- consider piloting a 'destinations survey' (in partnership with the largest RTOs delivering the outdoor recreation training package) as a means of assessing how graduates utilise their qualification(s) in their career.

## Abbreviations and acronyms

|        |  |
|--------|--|
| ABS    | Australian Bureau of Statistics                              |
| ANZSIC | Australia and New Zealand Standard Industrial Classification |
| AQF    | Australian Qualifications Framework                          |
| CSH    | Community Services and Health                                |
| DEEWR  | Department of Education, Employment and Workplace Relations  |
| IBSA   | Innovation and Business Skills Australia                     |
| ISC    | Industry Skills Council                                      |
| NCVER  | National Centre for Vocational Education Research            |
| NOSS   | National Outdoor Sector Survey                               |
| OCA    | Outdoor Council of Australia                                 |
| QDF    | Quality Declaration Framework                                |
| QORF   | Queensland Outdoor Recreation Federation                     |
| RTO    | Registered Training Organisation                             |
| SSA    | Service Skills Australia                                     |
| VET    | Vocational Education and Training                            |

## Introduction

In August 2010, the Outdoor Council of Australia (OCA) began discussions with Service Skills Australia (SSA) about measuring and defining the ‘outdoor sector’ and its workforce. Through this consultation, a pilot questionnaire was designed and launched in September 2010. Following its distribution to industry—primarily through OCA and its contacts—the survey ran for four weeks and closed on October 20, 2010. After completing the process of cleaning the data (e.g. removing multiple responses, etc.) a total of **325** responses were collected.

The main purposes of this report are to share the outcomes of the pilot project with industry, to discuss the results and their limitations, and to raise broader awareness of the project and its objectives for future participation in this industry-driven initiative.

## Background

The outdoor sector has regularly raised concerns over the way that the breadth and depth of this collective is poorly described within the boundaries of existing data collections. Furthermore, evidence regarding the nature of the outdoor sector and its return to the national economy is often unavailable. This point is highlighted in the following excerpt from an OCA report,<sup>2</sup> which attempts to contextualise the broader role of outdoor sector in contributing to society and general wellbeing:

*Whilst the benefits of outdoor adventure activities are acknowledged, are the industry, its leaders and programs valued?*

*There is considerable evidence<sup>3</sup> to suggest that outdoor adventure programs can impact positively on young people’s attitudes, beliefs and self-perceptions, yet are parents prepared to pay the real cost of supporting outdoor education programs within schools? Does the education system itself value the learning outcomes that can be achieved through a well-developed outdoor education program?*

*To research the value of participating in outdoor activities, studies have been completed of the economic and noneconomic benefits. As outdoor adventure activities form the basis of the adventure tourism industry, their value (directly and indirectly) to the Australian economy is significant. Similarly, the economic value of participation can also be measured by improved health and wellbeing and therefore lower health care costs. Additionally, the value people attribute to outdoor activities, purely as a result of doing them, and the social capital developed through community-based clubs and organisations can also be of benefit to individuals and communities.*

Another significant report, *Beyond Blue to Green*, outlines the benefits of contact with nature and for mental health and wellbeing. It too elaborates on the advantages for children and young people, as well as for the elderly people and those with low incomes. Overall, the main findings reported:

- a clear association between close proximity to green spaces and reduced prevalence of depression, anxiety and other health problems

<sup>2</sup> OCA, [Active Australians Outdoor](#), May 2008, pp.17-18.

<sup>3</sup> University of Canberra, [Australian Outdoor Adventure Activity Benefits Catalogue](#), August 2008.

- high levels of contact with nature result in higher levels of self-worth and higher cognitive function for children, and
- restricted access to nature potentially results in serious negative effects on children's physical, emotional and cognitive development.<sup>4</sup>

Finally, a recent report from the United States identifies similar links in confirming both the relationship “between physical activity that takes place outdoors and positive health outcomes” as well as the capacity of outdoor recreation to enhance both physical health and emotional wellbeing. In one instance, the first point is poignantly articulated as a relationship of “mutual influence”:<sup>5</sup>

*That is, people who participate in outdoor recreation are disproportionately in good health, and people in good health disproportionately participate in outdoor recreation.*

Due to the difficulty encountered in attempts to articulate their return to the national economy, the outdoor sector has been at a distinct disadvantage when providing evidence to attract funding for training. In response to these concerns, the key focus of the questionnaire developed for this project was to gauge the scope of the industry from the perspective of employers or managers of organisations. This incorporated a review of existing industry data, which subsequently revealed the need for greater quality and clarity of data.

## Objectives

The National Outdoor Sector Survey 2010 (NOSS10) questionnaire was developed as part of conducting a national stocktake in order to begin the process of quantifying the outdoor industries in Australia. This includes defining the:

- size and turnover of the sector (incorporating volunteers)
- breadth and extent of the services offered, and
- capability of its workforce (i.e. qualification profile).

In this way, the industry is taking ownership of the issues and responding in a proactive manner in order to better describe the nature of the outdoor sector.

For this final report, these issues have been compiled into six key themes—each with a designated action seeking to address the specific concern.

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<sup>4</sup> Townsend, M. and R. Weerasuriya (Deakin University), [\*Beyond Blue to Green: The benefits of contact with nature for mental health and well-being\*](#), produced for beyond blue: the national depression initiative, April 2010.

<sup>5</sup> Godbey, G, [\*Outdoor Recreation, Health and Wellness: Understanding and enhancing the relationship\*](#), prepared for the Outdoor Resources Review Group “Resources for the Future” background study, 2009, pp.1, 14. Also see: Morris, L. et al, [\*Mental Health and Wellbeing in the ACT: Results of the Personality and Total Health \(PATH\) through life project\*](#), produced by Australian National University (ANU) and ACT Government Health Directorate, 2011, p.7; ABS, [\*“Sport and Physical Recreation”\*](#), in 4102.0 – *Australian Social Trends*, June 2011, p.4.



## Q&A: Quandaries and Actions

### Quandary #1: Catalyst

*The outdoor sector needs more detailed data about its workforce for the purposes of planning and lobbying.*

### Action

In August 2010, OCA and SSA commenced a research partnership to deliver a pilot questionnaire to explore the nature of the outdoor sector in greater detail than is currently available. Now known as the National Outdoor Sector Survey 2010 (NOSS10),<sup>6</sup> this joint project of OCA and SSA is set to continue as a biennial project in a modified format. The possible and desired long-term outcomes from this industry-driven project include a mechanism with which to collect longitudinal data, a pilot assessment of the occupational destinations of VET course completers (e.g. outdoor recreation), as well as the opportunity to investigate sector-specific issues such as workforce mobility.

NOSS10 was largely co-ordinated and disseminated by the OCA, with research design and analysis duties being conducted by the SSA research team. This project utilised personnel with experience in both qualitative and quantitative research, namely questionnaire design and methodology analysis. It has also drawn on diverse backgrounds spanning the fields of academic, industrial, market and social research.

Though many stakeholders are to be commended on their commitment to acting on the issues and needs identified by industry, one immediate limitation resulting from the swift launch and deployment of the project has been a lack of access to funding. NOSS10 did not receive any allotted budgetary funding from OCA or SSA and, thus, was carried out as an additional activity to current ongoing projects and daily tasks.

A potential advantage created by additional funding for NOSS10 could have been the opportunity to outsource the implementation of the survey to an external provider and host. In all likelihood, this would have sped-up the data collection process and, therefore, the subsequent data analysis and reporting processes as well. Even so, this lack of funding will have had little-to-no effect on the data quality associated with a sample survey directed at a target population that had not yet been completely identified, as was the case in this project (see Quandary #6 for more detail).

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<sup>6</sup> The original name for this project was the *Outdoor Industries Survey* (or OIS10).

### Quandary #2: Conundrum

*Outdoor sector data needs to be 'fit for purpose' as existing categories provided elsewhere offer no direct or convenient alignment.*

As the Industry Skills Council (ISC) that exclusively represents the service industries, SSA covers the following fourteen sectors:

|                      |                           |           |
|----------------------|---------------------------|-----------|
| BEAUTY               | FUNERAL SERVICES          | RETAIL    |
| COMMUNITY PHARMACY   | HAIRDRESSING              | SPORT     |
| COMMUNITY RECREATION | HOLIDAY PARKS AND RESORTS | TOURISM   |
| FITNESS              | HOSPITALITY               | WHOLESALE |
| FLORISTRY            | OUTDOOR RECREATION        |           |

Unlike student enrolment and completions data collated by the National Centre for Vocational Education and Research (NCVER), labour force data categories compiled by the Australian Bureau of Statistics (ABS) do not always conveniently align with the labour force coverage of ISCs. Despite this lack of alignment, SSA is able to approximate its total labour force coverage at 21.3% (or 2,435,300) based on the most detailed and most recent data available.<sup>7</sup>

More specifically, the sport and recreation industry—comprising the sectors of sport, fitness, outdoor recreation and community recreation—roughly equates to 1.0% (or 117,200) of the nation's workforce. This calculation is based on the Australia and New Zealand Standard Industrial Classification (ANZSIC) category "Subdivision 91 Sports and Recreation Activities". Subdivision 91 further incorporates "Group 913 Amusement and Other Recreation Activities", which accounts for approximately 0.1% (10,500) of all paid employees in Australia.<sup>8</sup> This is the closest possible estimation available of the outdoor recreation sector as 'outdoor recreational services' falls under "Class 9139 Amusement and Other Recreational Activities n.e.c." (not elsewhere classified) along with "Class 9131 Amusement Parks and Centres Operation" (see Figure 1.0).

<sup>7</sup> ABS, [6291.0.55.003 - Labour Force, Australia, Detailed, Quarterly, May 2011](#) (Released 16/6/2011); IBISWorld, [Industry Reports: I6641: Travel Agency Services in Australia, June 2011](#); Q9524 *Funeral Directors, Crematoria and Cemeteries in Australia, April 2011*; Q9526 *Hairdressing and Beauty Salons in Australia, April 2011*.

<sup>8</sup> DEEWR, [Employment Level by Industry Sector](#), Trend data based on ABS 6291.0.55.003 – Labour Force, Australia, February 2011.

**FIGURE 1.0 – OUTDOOR RECREATION AND ANZSIC CODING****Division R ARTS AND RECREATION SERVICES****↳ Subdivision 91 SPORTS AND RECREATION ACTIVITIES****↳ Group 913 AMUSEMENT AND OTHER RECREATION ACTIVITIES**

Class 9131 Amusement Parks and Centres Operation

**↳ Class 9139 Amusement and Other Recreational Activities n.e.c.****↳ Primary activities**

Amusement activity n.e.c.  
 Bungy jumping operation  
 Bush walking operation  
 Cave diving operation  
 Outdoor adventure operation n.e.c.  
 Recreational activity n.e.c.  
 White water rafting operation

Source: ABS, [1292.0 - Australian and New Zealand Standard Industrial Classification \(ANZSIC\), 2006 \(Revision 1.0\)](#), (Released: 19/09/2008).

One significant reason why the sport and recreation industry represents less than one percent is because these figures only incorporate the number of **paid** employees per industry and do not measure **unpaid** work carried out by volunteers. This is especially intriguing for sport and recreation where the latest statistics on volunteering provided by the ABS indicate that “sport and physical recreation organisations”:

- are the most likely to be fully staffed by volunteers (72.1%), and
- have the largest share of:
  - volunteer numbers (1.7m or 32.8%)
  - volunteering involvements (1.9m or 25.0%), and
  - annual hours of voluntary work (187.2m or 26.5%).<sup>9</sup>

At present, due to the differing collection methodologies regarding paid and unpaid employees, these two sets of data cannot be cross-pollinated to produce industry statistics that simultaneously account for:

1. paid workers
2. unpaid volunteers, and
3. those who were involved in both forms of work.

<sup>9</sup> ABS, [4441.0 – Voluntary Work, Australia, 2006](#), Released: 20/7/2007, pp.40, 56.

Another data collection issue in this area is measuring people versus measuring people's separate involvements. For example:

- Paid and unpaid work: the same ABS data estimate the number of people providing voluntary work in Australia to be in the vicinity of 5.2 million. Of this figure, 3.7 million (70.2%) were employed and, thus, operating in multiple capacities or 'involvements'.
- Multiple volunteering: nearly 2 in 5 volunteers (37.6%) provide their services to two or more organisations.<sup>10</sup>
- Multiple job holders: in 2007, 6.4% of employed people (658,700) had more than one job—a statistic that has remained consistently static since the 1990s.<sup>11</sup>

Evidently, the 'outdoor sector' concept expands far beyond the outdoor recreation sector. However, prior to deploying the questionnaire, there were two key difficulties in determining the full extent of which other sectors were involved:

1. Membership of the outdoor sector was significantly of a self-identified nature—that is, comprising people who (first) know of the term and (second) feel an association or relationship with the collective it attempts to capture.
2. Such a study had not been conducted before.

## Action

NOSS10 was initiated primarily as an exploratory exercise, taking into account existing data and industry consultation. While the questionnaire employed in this project has made an initial attempt to respond to these data needs, any attempts to accurately collect the level of intricate detail inherent in labour force categorisations are fraught with difficulty and will likely require further investigation that combines both quantitative and qualitative research approaches.

This pilot study has yielded some valuable results and brought to bear a significant set of lessons regarding the articulation of the outdoor sector and its workforce (see Appendices). Among those lessons, it has been identified that SSA has further overlap between its coverage and the outdoor sector occurring in the fitness, hospitality, retail and tourism sectors.<sup>12</sup> Furthermore—based on the qualification profile reported—some relevant training associated with several other workforce sectors and other ISCs was also captured (to some degree) by the outdoor sector, namely:<sup>13</sup>

<sup>10</sup> [Ibid](#), pp.20, 35; For comparison, the total labour force—employed and unemployed—for the same reference period (2006) was between 10.6 and 11.0 million (ABS [6202.0 – Labour Force, Australia](#)).

<sup>11</sup> ABS, [6361.0 - Employment Arrangements, Retirement and Superannuation, Australia, Apr to Jul 2007 \(Re-issue\)](#), Released: 2/6/2009, p.29; ABS, "People with more than one job", in [4102.0 - Australian Social Trends, Sep 2009](#), Released: 24/9/2009, p.1.

<sup>12</sup> Please note: the omission of 'sport' from this list is due to the strictly non-competitive nature of the vast majority of activities undertaken in the outdoor sector.

<sup>13</sup> The NOSS10 questionnaire was designed only to collect the occurrence of a qualification—as opposed to collecting the highest educational attainment of individuals or the frequency of each qualification held within individual organisations.

- Education, Business Services (Innovation and Business Skills Australia)
- Health (Community Services and Health)
- Horticulture (AgriFood Skills Australia)

Seizing on the education sector—given its dominance in the results—these data present opportunities for future collaboration regarding outdoor sector workforce issues as well as for NOSS12 and beyond.

Finally, SSA and OCA will continue to engage in discussions with the ABS regarding outdoor sector data needs and the potential for collaborative work in the future.

### Quandary #3: Complexity

*Outdoor sector data also needs to consider the measurement of various sectors and various types of worker.*

### Action

NOSS10 attempted to collect this information, taking into account some degree of limitation on the data as well as a reliance on estimated data provided by respondents. The following includes some examples of statements and actions listed in the Quality Declaration Framework (see Appendices):

Staff measurements represent involvements (i.e. jobs) and not people; therefore it is likely that the numbers collected for both paid and unpaid work bear this (somewhat increased) skew. This is an unavoidable consequence of the approach adopted—one person responding on behalf of an entire organisation—as it is very difficult to accurately measure those working in multiple capacities without direct contact with the individuals themselves.

Estimated figures pertaining to volunteering were often supplied with disclaimers in the additional comments section provided by the questionnaire—namely that volunteer work was regularly of a seasonal/ad hoc nature and typically occurred in the context of specific projects, events and programs. This was especially the case in smaller regions and states/territories (e.g. Tasmania).

Contracted and/or freelance staff were not explicitly separated as a category of respondents. While it is evident that some members of this cohort persevered in completing the survey, one participant sought further assistance with the uncertainty they experienced. Following appropriate consultation between OCA and SSA, it was concluded that—given the questionnaire’s intent to target organisations (including those that employed contracted/freelance staff)—this cohort would ideally be captured in NOSS10 by the organisations that paid for their services. However, it was also noted that there may be a need to reconsider the approach to measuring this cohort in the design of future longitudinal research.

Those who identified themselves as being ‘sole traders’ initially expressed uncertainty with how to proceed on questions pertaining to staffing arrangements. Once uncovered, OCA and SSA co-ordinated and implemented an immediate amendment to the survey that provided clear opportunity for those who identified as ‘sole traders’ to engage/re-engage with NOSS10. The hyperlink to the revised questionnaire was subsequently communicated through a redirection notice (on the opening page of the initial hyperlink) as well as through survey reminder notices emanating from both OCA and SSA. Even so, not all people who were self-employed and operated their business without any additional permanent paid staff selected the ‘sole traders’ option (question 11). Indeed, an unanticipated outcome was the many instances where responses from organisations of one permanent paid employee also indicated the existence of casual, contracted and/or volunteer workers. This will be an important consideration for the design of longitudinal research.

**Quandary #4: Consultation**

*Even with adequate preparation and consultation, the questionnaire design ultimately enacted some limitations on the data.*

**Action**

A discussion paper and roundtable industry consultation addressed ways to enhance NOSS12, with limitations to be communicated via a 'Quality Declaration Framework'.

The NOSS10 questionnaire was constructed with regular consultation between OCA and SSA over a three-week period and, subsequently, deployed online on September 22, 2010. The online survey was hosted through SSA's subscription account to the Survey Methods platform ([www.surveymethods.com](http://www.surveymethods.com)) and remained in the field for four consecutive weeks (closing on October 20, 2010). During this time, both OCA and SSA issued reminder notices that politely encouraged those who had not yet completed the online survey prior to consider doing so by its closing date.

The same questionnaire was also replicated in both Microsoft Word format (for electronically-completed responses) and Adobe Acrobat format (for printed postal responses)—the latter appears in the Appendices of this document. With the primary emphasis being on efficient completion and analysis, these alternate completion forms were designed as secondary collectors only for those who were experiencing difficulty with the online format. This was apparent either through direct contact with representatives of OCA and SSA, or through concurrent data management undertaken by SSA.

Considering that the questionnaire format is most conducive to a sole respondent completing in a single sitting, the survey specifically requested "one (1) representative from your organisation/company to complete" with a call to "describe our industry as accurately as possible". In essence, it was designed to target the most knowledgeable member of each responding organisation; however, it is likely (on some level) that such an outcome did not always transpire. Likewise, it is also likely that the most knowledgeable member did not always have the full extent of information sought by NOSS10. Though these outcomes may place limitations on some of the data, this approach was deemed to be the most appropriate course of action on this first attempt to articulate the outdoor industries. Having said this, Quandary #5 considers an alternative approach for future iterations of this exercise.

**Quandary #5: Centrality**

*The outdoor sector is characterised by many seemingly disparate entities with no central communication channel.*

**Action**

OCA and SSA will continue to progressively develop a research-only contacts database for this project over time and aim for more co-ordinated involvement of the relevant peak bodies and national organisations.

The approach to disseminating news regarding NOSS10—including the hyperlink to the online questionnaire—was primarily co-ordinated through OCA and its various industry contacts throughout the country. Secondary dissemination was carried out by SSA through a dedicated project page on its website and notifications to its subscribers.

Such an approach with this first attempt was largely out of necessity as it has been acknowledged that one of the greatest weaknesses of the outdoor industries is that it is currently characterised by many seemingly disparate entities. This particular trait makes it difficult for the stakeholders within the outdoor industries to recognise all other stakeholders with a vested interest in forwarding its agenda. Ideally, an ultimate result of this first study will be an enhanced ability to better communicate with the various industries involved, creating a sense of unity that will potentially bind these parties together for years to come.

One of the disadvantages to this reliance on multiple small organisations to distribute the link via their own communication means was an apparent lack of clarity around the NOSS10 being a joint effort of OCA and SSA. Also due in part to the swift launch and deployment of the project, there were examples of such communications making no references to SSA yet—upon clicking through to the online survey—participants would be presented with a questionnaire bearing the SSA name and logo (alongside reference to OCA). Additionally, an associated outcome of this particular approach was that many contacts received information pertaining to NOSS10 from multiple sources.

The advantage of these outcomes is that the following proposed solutions for future iterations of this exercise should be easy enough to implement, namely:

- Draw on the list of email contacts and organisations collected via NOSS10 to assist in building a nationwide database.
- Combine aforementioned details with existing list of OCA stakeholder contacts in order to create a central contacts list of stakeholders identifying with the outdoor industries.
- Institute SSA as the central agency for disseminating news regarding the 2012 National Outdoor Sector Survey (NOSS11) and beyond, with additional (though ideally minimal) reliance on external agencies to disseminate hyperlinks on SSA's behalf.



- In the event that further assistance is required from external agencies, this should incorporate the adoption of a one-size-fits-all letter comprising content generated by OCA (with relevant consultation) that addresses the key details of the project. This will minimise confusion and ensure that participants on the periphery are sufficiently informed.

Another disadvantage of this approach was the lack of co-ordination within the larger organisations who responded to the NOSS10. This resulted in many instances of multiple responses occurring from within the one related organisation—the most extreme example being eight responses, with one these being from the official national body. The most immediate setback to this outcome was the resultant resources required to sift through the data received and ‘clean’ responses where duplication was evident.

However, it is envisioned that this outcome could be avoided in the future simply by targeting the peak bodies and larger organisations through an additional data collection stage (prior to launching the survey to the broader industry). Particularly where national organisations are involved, such an early stage could allow further time to co-ordinate the data from different stages and to maximise its accuracy.

A final option for consideration in the future is to possibly set up an administrative process that maintains contact with the industry membership. It is envisaged that such a move would have two key benefits:

1. Ongoing management of the contacts database, including additions and subtractions to the membership, to facilitate enhanced and timely communication with stakeholders.
2. The ability to design and establish a longitudinal quantitative data collection mechanism that yields the content sought through NOSS in the form of an “administrative by-product”.

### Quandary #6: Collection

*NOSS10 was a self-operated, non-representative sample survey directed to an as yet fully-defined target population.*

### Action

NOSS12 and beyond will continue to adopt this approach, building on lessons learned, and working towards increased participation and survey completions.

### APPROACHES TO DATA COLLECTION

The three main data collection processes for quantitative data are:

1. Census—an official count or survey of a defined population.
2. Sample survey—a count that draws on only part of a targeted population.
3. Administrative by-product—a count drawn via a regular process of an organisation.

Where the main elements of data collection are considered as being **cost, time and quality**, each of these processes has its inherent bonuses and trade-offs. For instance, while a census will produce highly-detailed and highly-accurate data of an entire population (i.e. quality), it is characteristically costly and time-consuming to implement.

Sample surveys, however, pose a separate set of issues. If administered externally to a private list or panel, a sample survey may be remarkably time-efficient yet simultaneously be decidedly costly compared to a self-operated approach. If administered internally (i.e. self-operated), a sample survey can be comparatively cheaper to operate yet is likely to require sufficient time resources in questionnaire design and data analysis. Additionally, though one can theoretically exercise a degree of control over the quality of questionnaire design—self-operated or otherwise—significant limitations may occur in regards to data quality (namely accuracy and detail).

For instance, if the sample taken of a *target* population was not representative of the broader *total* population it intends to reflect,<sup>14</sup> any attempts to extrapolate its results will bear notable sampling errors and bias. This problem will also be further exacerbated if the size of the sample taken is insufficient. Put more succinctly, a census yields data for the total population targeted whereas a sample survey—at best, through best practice scientific means—may estimate the likely results of a census.

<sup>14</sup> Explained briefly, a 'representative sample' may be identified by proportionately aligning with key characteristics of the total population targeted. This may be based on individual measureable traits such as gender, age, suburb of residence, highest educational attainment, annual personal income, ethnic background, marital status, number of dependents and so on.

***To provide additional perspective, NOSS10 was a self-operated sample survey directed towards an as yet fully-defined target population. This means that the results presented in this paper are exploratory and not representative.***

Consequently, while significant data has come out of this process, it is important to be aware of the limitations experienced as a result of the ‘non-sampling errors’ encountered (see Appendix One for more detail).

In contrast to the census and sample survey approaches, once the collection instrument has been designed and implemented, the advantages of the administrative by-product approach are (ideally) a time-efficient completion method and accurate data obtained through administrative obligation. The caveat, however, is in the design of the collection instrument. As is the case with a census, in order to establish consistent measurement over a period of time, these collection mechanisms need to remain reasonably static and, thus, require a thorough and robust design.

## **SURVEY SUPPORT**

To ensure that problems raised by participants could be addressed in a timely manner, SSA also served as the primary contact for survey support. This occurred through both direct contact with SSA (via email or phone) and referred contact through OCA (typically via email).

As an additional means of maximising completion numbers, further recipients of survey support were actively identified through ongoing analysis of the data while the survey remained in the field. For instance, where it was evident that participants who registered non-completions on at least one occasion had failed to return to the questionnaire—in an effort to re-engage their organisation with the survey—these respondents were recontacted with a generic survey reminder notice. Accordingly, those who did return after initial non-completions and, subsequently, completed the survey were also identified so as to ensure they were not contacted unnecessarily.

Given that non-completions of a survey are to be expected on some level, the questionnaire for NOSS10 was specifically designed so that the first piece of information collected from every participant was an email address. Not only did this facilitate the ability to re-engage those who registered non-completions, it also assisted in providing a greater understanding of the reasons behind their non-completion—the immediate advantage of which was to apply this feedback back into the questionnaire design where possible.

## DATA CLEANING

Once the survey was closed (on October 20, 2010), participants that did not complete the questionnaire—by answering up to question 32, the last guaranteed compulsory question—were not included in the results.

As an extension of its data management strategies employed during the ‘field’ stage of NOSS10, SSA ran a quality check on these survey completions data only, which involved:

- Checking for multiple responses from the one organisation and analysing the consistency between the multiple responses of an individual organisation. This included excluding any answer outcome where the multiple responses generated conflict—namely in Yes/No answer options.
- Where multiple responses were evident, selecting the most appropriate set of answers provided by such an organisation as its official response and eliminating data duplication.
- Scrutinising figures that appeared obviously incongruous with the rest of the data received and/or figures that demonstrated a clear misunderstanding of a question’s intent.
- Scanning for evidence of ‘satisficing’ (i.e. half-hearted responses, incorrect completion due to lack of commitment or interest).<sup>15</sup>

The main purpose and benefit of this process was to maximise the quality of the results that were being drawn on for analysis. Consequently, NOSS10 collected a total of **325** completed responses.

### Final note

*Due to insufficient figures, the results presented in Appendix One are not segmented into state/territory categories.*

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<sup>15</sup> Krosnick, J.A. et al, “Satisficing in surveys: Initial evidence”, in *Advances in survey research*, M.T. Braverman and J.K. Slater (Eds.), San Francisco: Jossey-Bass, 1996, pp.29-44.

## Appendix One: Results

- Q3. Please identify the state(s) and/or territory(ies) in which your organisation/company is based.

|                                 | Number     | Percentage    |
|---------------------------------|------------|---------------|
| NSW                             | 62         | 19.1          |
| VIC                             | 76         | 23.4          |
| QLD                             | 84         | 25.8          |
| WA                              | 12         | 3.7           |
| SA                              | 28         | 8.6           |
| TAS                             | 17         | 5.2           |
| ACT                             | 16         | 4.9           |
| NT                              | 13         | 4.0           |
| National organisations          | 9          | 2.8           |
| Other multi-state organisations | 8          | 2.5           |
| <b>TOTAL (AUS)</b>              | <b>325</b> | <b>100.0%</b> |

- Q4. Is your organisation/company a school or registered training organisation (RTO)?

|                     | Number     | Percentage    |
|---------------------|------------|---------------|
| School and/or RTO   | 115        | 35.4          |
| School              | 59         | 18.2          |
| RTO                 | 41         | 12.6          |
| Both                | 15         | 4.6           |
| Not a school or RTO | 210        | 64.6          |
| <b>TOTAL (AUS)</b>  | <b>325</b> | <b>100.0%</b> |

- Q5. Please describe the ownership structure of your organisation/company.

|                                   | Number     | Percentage    |
|-----------------------------------|------------|---------------|
| Government agency / Public sector | 61         | 18.8          |
| Not-for-profit organisation       | 120        | 36.9          |
| Commercial enterprise             | 103        | 31.7          |
| Other                             | 41         | 12.6          |
| <b>TOTAL (AUS)</b>                | <b>325</b> | <b>100.0%</b> |

Q6. Does your organisation provide outdoor and adventure activities?

|                    | Number     | Percentage    |
|--------------------|------------|---------------|
| Yes                | 279        | 86.1          |
| No                 | 45         | 13.9          |
| <b>TOTAL (AUS)</b> | <b>324</b> | <b>100.0%</b> |

Q7. From the list below, please select all of the outdoor and adventure activities provided by your organisation/company.

|                             | Number | %    |                               | Number     | %        |
|-----------------------------|--------|------|-------------------------------|------------|----------|
| Bushwalking                 | 195    | 69.9 | Tour guiding                  | 39         | 14.0     |
| Camping                     | 186    | 66.7 | Horse riding                  | 34         | 12.2     |
| Team building / initiatives | 163    | 58.4 | Picnicking                    | 33         | 11.8     |
| Canoeing                    | 159    | 57.0 | Snowboarding                  | 32         | 11.5     |
| Orienteering                | 145    | 52.0 | Canyoning                     | 28         | 10.0     |
| Climbing                    | 141    | 50.5 | Four-wheel-driving            | 23         | 8.2      |
| Abseiling                   | 131    | 47.0 | Scuba diving                  | 18         | 6.5      |
| Ropes courses               | 131    | 47.0 | Yachting                      | 16         | 5.7      |
| Mountain bike riding        | 101    | 36.2 | Kite flying                   | 15         | 5.4      |
| Expeditioning               | 99     | 35.5 | Fossicking / collecting       | 13         | 4.7      |
| Nature studies              | 96     | 34.4 | Skateboarding / rollerblading | 9          | 3.2      |
| Kayaking                    | 95     | 34.1 | Waterskiing                   | 8          | 2.9      |
| Cycling                     | 89     | 31.9 | Sailboarding                  | 6          | 2.2      |
| Archery                     | 82     | 29.4 | Jet skiing                    | 4          | 1.4      |
| Conservation activities     | 80     | 28.7 | Windsurfing                   | 4          | 1.4      |
| Rafting                     | 71     | 25.4 | Hang- /para-gliding           | 3          | 1.1      |
| Surfing                     | 63     | 22.6 | Motor/trail bike riding       | 3          | 1.1      |
| Boating/sailing             | 60     | 21.5 | Ballooning                    | 2          | 0.7      |
| Fishing                     | 59     | 21.1 | Parachuting                   | 2          | 0.7      |
| Skiing                      | 57     | 20.4 | Hunting /shooting             | 1          | 0.4      |
| Snorkelling                 | 54     | 19.4 | Bungy jumping                 | 0          | 0.0      |
| Rogaining                   | 53     | 19.0 | Kite surfing                  | 0          | 0.0      |
| Caving                      | 46     | 16.5 | <b>TOTAL (AUS)</b>            | <b>279</b> | <b>-</b> |

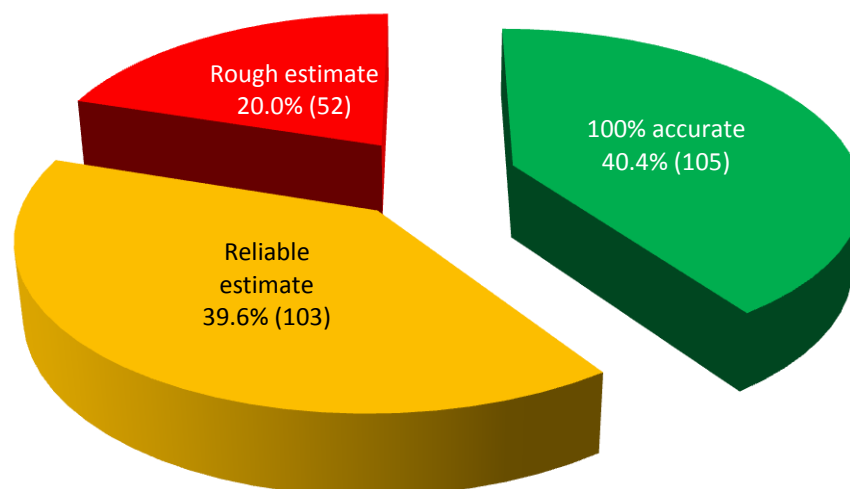
- Q8. Does your organisation/company also provide services other than the delivery of face-to-face outdoor programs?

|             | Number | Percentage |
|-------------|--------|------------|
| Yes         | 203    | 72.8       |
| No          | 76     | 27.2       |
| TOTAL (AUS) | 279    | 100.0%     |

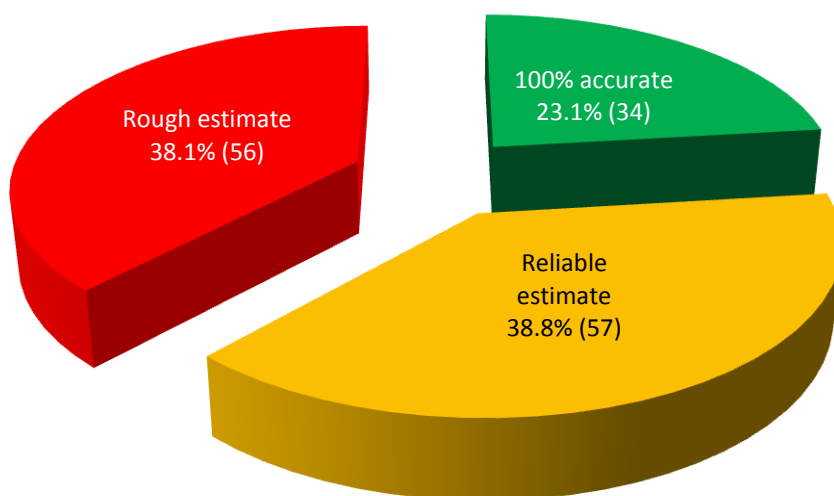
- Q11. Are you a *sole trader* or does your organisation/company have paid staff and/or volunteers?

|                         | Number | Percentage |
|-------------------------|--------|------------|
| Sole trader             | 40     | 12.3       |
| Staff and/or volunteers | 285    | 87.7       |
| TOTAL (AUS)             | 325    | 100.0%     |

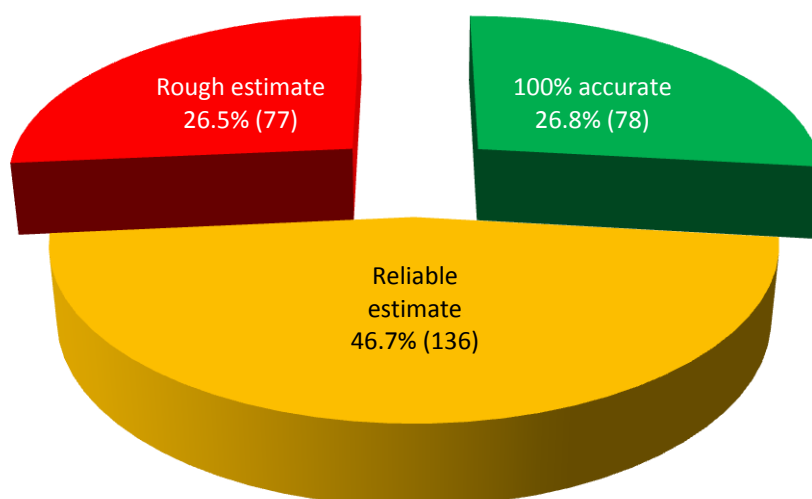
- Q14. Regarding the 2009 *calendar year* (Jan-Dec), are you able to *identify* or *estimate* the number of **paid staff** (including contractors) that worked in or provided services to your organisation/company?



- Q23. Regarding the 2009 *calendar year* (Jan-Dec), are you able to *identify* or *estimate* the number of (unpaid) **volunteers** that worked in or provided services to your organisation/company?



- Q32. Regarding the 2009 *calendar year* (Jan-Dec), are you able to provide accurate figures or estimates for the number of individual people who used the services of your organisation/company?





- Q15. Using the four (4) employment categories provided, please state the number of **paid staff** that worked in your organisation for the 2009 calendar year.

| OPTIONAL    | Number<br>(involvements) | Percentage | Median<br>(per organisation) |
|-------------|--------------------------|------------|------------------------------|
| Full-time   | 228,721                  | 67.2       | 3                            |
| Part-time   | 1,056                    | 0.3        | 1                            |
| Casual      | 3,014                    | 0.9        | 3                            |
| Contracted  | 107,382                  | 31.6       | 0                            |
| TOTAL (AUS) | 340,173                  | 100.0%     | -                            |

- Q24. Please state the number of unpaid **volunteers** that worked in your organisation/company for the 2009 calendar year.

|            | Number<br>(involvements) | Median<br>(per organisation) |
|------------|--------------------------|------------------------------|
| Volunteers | 72,347                   | 15                           |

- Q16. Using the four (4) employment categories provided (similar to above), how many hours do your **paid staff** (on average) work in a week?

| OPTIONAL    | Median<br>(per organisation) |
|-------------|------------------------------|
| Full-time   | 40                           |
| Part-time   | 20                           |
| Casual      | 12                           |
| Contracted  | 10                           |
| TOTAL (AUS) | 18,466.2<br>hours per week   |

- Q25. In an average week, what is the combined total number of hours worked by your (unpaid) **volunteers**?

|                             | Number    | Median<br>(per organisation) | Median<br>(per individual) |
|-----------------------------|-----------|------------------------------|----------------------------|
| Volunteer<br>hours per week | 327,720.7 | 20                           | 1.3                        |

- Q17. Please estimate the average duration of employment (in years and/or months) for the *full-time* and *part-time* **paid staff** only who work in your organisation.

| OPTIONAL  | Median<br>(per organisation) |
|-----------|------------------------------|
| Full-time | 5 years                      |
| Part-time | 3 years                      |

- Q26. Please estimate the average duration of employment (in years and/or months) for the (unpaid) **volunteers** only who work in your organisation/company.

| OPTIONAL   | Median<br>(per organisation) |
|------------|------------------------------|
| Volunteers | 3 years                      |

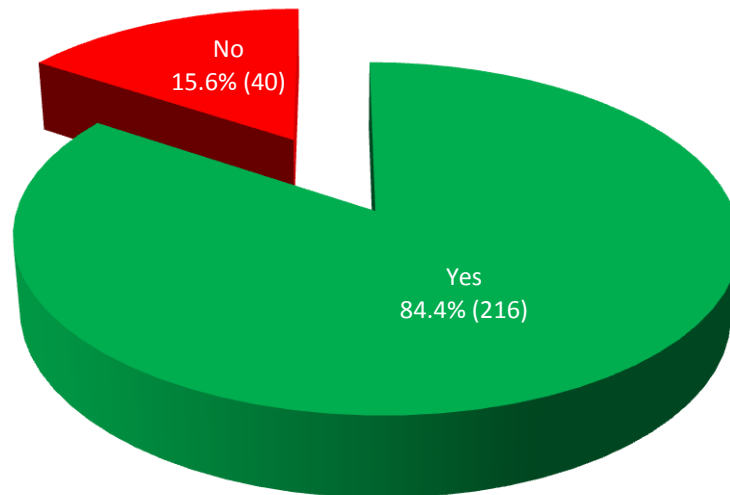
- Q19. Regarding your organisation's/company's staffing requirements, how many additional **paid staff** do you...

| OPTIONAL                              | Number | Median<br>(per organisation) |
|---------------------------------------|--------|------------------------------|
| Need now?                             | 446    | 1                            |
| Think you will need in 1 year's time? | 651    | 2                            |
| Think you will need in 5 years' time? | 1561   | 3                            |

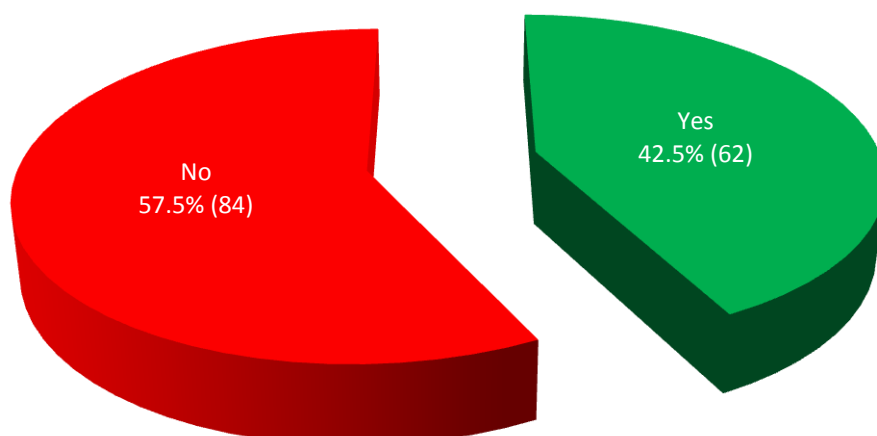
- Q28. Regarding your organisation's/company's staffing requirements, how many additional unpaid **volunteers** do you...

| OPTIONAL                              | Number | Median<br>(per organisation) |
|---------------------------------------|--------|------------------------------|
| Need now?                             | 14,302 | 2                            |
| Think you will need in 1 year's time? | 15,033 | 4                            |
| Think you will need in 5 years' time? | 18,459 | 6                            |

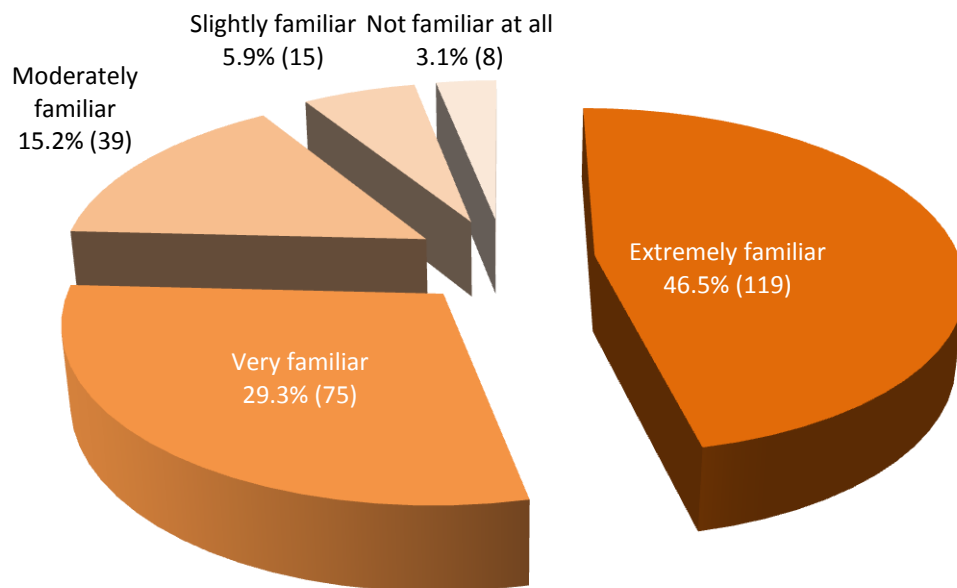
Q20. Does your organisation/company provide access to any formal training or professional development for your **paid staff**?



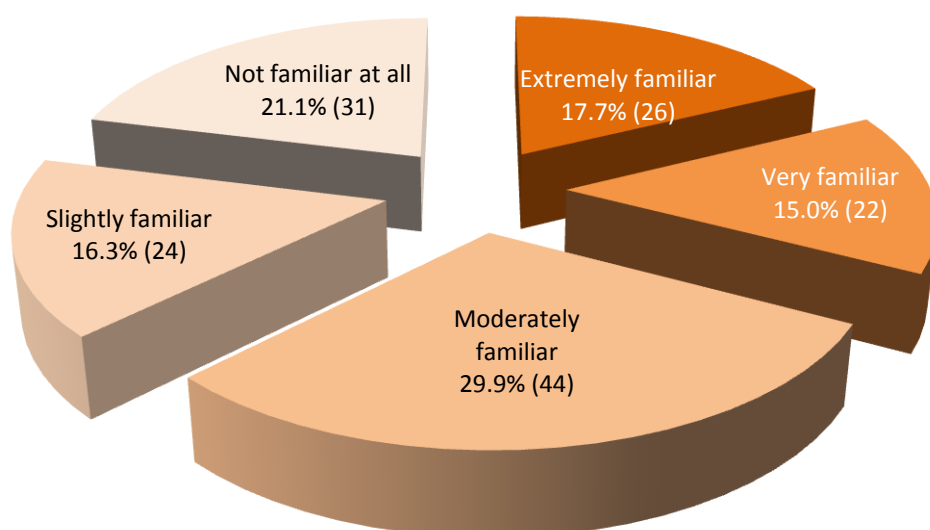
Q29. Does your organisation/company provide access to any formal training or professional development for your (unpaid) **volunteers**?



Q21. Using the following rating scale, how familiar are you with the qualifications held by **paid staff** in your organisation/company?



Q30. Using the following rating scale, how familiar are you with the qualifications held by (unpaid) **volunteers** in your organisation/company?



- Q33. Please enter your *accurate figure* or *estimate* for the number of people who used the services of your organisation in the 2009 calendar year.

|           | Number    | Median<br>(per organisation) |
|-----------|-----------|------------------------------|
| Customers | 5,231,653 | 1,000                        |

- Q34. For the 2009 *calendar* year, did your organisation receive any funding or financial assistance from the government?

| OPTIONAL     | Number | Percentage |
|--------------|--------|------------|
| Yes          | 117    | 36.0       |
| No           | 170    | 52.3       |
| Not sure     | 16     | 4.9        |
| Non-response | 22     | 6.8        |
| TOTAL (AUS)  | 325    | 100.0%     |

- Q35. What was your total turnover for the 2009 calendar year?

| OPTIONAL              | Total<br>(104) | Median<br>(per organisation) |
|-----------------------|----------------|------------------------------|
| Turnover (\$ million) | 201.6          | 0.24                         |

## Appendix Two: Quality Declaration Framework

### Institutional environment

*The institutional and organisational factors that have a significant influence on the effectiveness and credibility of the agency producing the statistics.*

#### Owner of the data collection

The data collection process was co-ordinated by the Outdoor Council of Australia and Service Skills Australia—each of which is a supplier of industry advice to the outdoor recreation sector.

Service Skills Australia was responsible for managing the data collection process, which was staffed by an experienced and qualified researcher.

#### Authority

The data was not collected in association with any legislation, but run under the authority of the Outdoor Council of Australia.

The Outdoor Council of Australia (OCA) is an incorporated, not-for-profit association of outdoor industry professionals in Australia. Its mission is to build a sustainable future for outdoor recreation in Australia by representing the views and needs of the outdoor sector to the community, industry and all levels of government. Additionally, the OCA:

- advocates for policies, strategies and actions that support and encourage the broader outdoor recreation sector
- promotes a philosophy and practice of sustainable interaction with the natural environment
- encourages organisational development within the outdoor community that enhances the delivery of services
- promotes best practices in standards and quality of leadership and training, and
- promotes the advancement of research on outdoor related issues and participation.

### Relevance

*The degree to which the data meets the real needs of clients.*

#### Purpose of collection

The outdoor sector has regularly raised concerns over the way that the breadth and depth of this collective is poorly described. Furthermore, evidence regarding the nature of the outdoor sector and its return to the national economy is often unavailable. As a result, the outdoor sector has been at a distinct disadvantage regarding their ability to provide evidence to attract funding for training and to articulate its contribution to the national economy. This project was a direct response to those concerns.

It is anticipated that the key users of this data will be those who comprise the target population of the questionnaire (i.e. organisations who identify with the 'outdoor sector' moniker).

### **Scope**

The population covered by this data collection comprises a sample of organisations and individuals in Australia that use outdoor adventure activities for the purposes of recreation, education, tourism, personal development and corporate development.

In order to participate in this research project, respondents will have first had to receive an email notification of some description (e.g. newsletter or reminder notice) informing them of the survey, its purpose and its aims. This means that participation was contingent on both having contact details registered with a peak body and access to the internet.

### **Reporting unit**

Data was collected from a sample of individuals who were either:

1. sole traders, or
2. members of an organisation reporting on behalf of all paid employees and unpaid volunteers who provided services to that organisation for the 2009 calendar year.

### **Frame**

The list of potential respondents was not drawn from a central list or database. Instead, the list resulted from disseminating the online questionnaire hyperlink through the OCA, the various industry contacts of the OCA, and subscribers to SSA's website and notification service.

The data quality issues resulting from this frame include:

- the possibility that not all relevant contacts were reached
- inability to provide direct communication to all relevant contacts through a central agency/list (e.g. changes to the survey)
- lack of clarity around the project's origins and intent

### **Key concepts**

The key concepts addressed in the data collection are:

- number of paid involvements
- number of unpaid (volunteer) involvements

- financial turnover
- financial expenditure on salaries and wages
- outdoor and adventure activities offered
- qualifications held by paid and unpaid persons

### **Mode of data collection**

NOSS10 adopted a “sample survey” approach, which was largely conducted by using the self-operated online survey platform, Survey Methods. Alternate completion forms were also offered and supplied in both paper and electronic formats.

While the sample acquired represents a broad cross-section of sole traders and organisations in the outdoor industries, from all states and territories of Australia, it cannot be considered a random sample or representative of all sole traders and organisations’ views.

### **Timeliness**

*The delay between the reference point and when data becomes available.*

### **Availability of data**

NOSS10 was developed as a one-off exploratory questionnaire. The reference period for this data collection largely requested answers based on the 2009 calendar year (i.e. January 1, 2009 to December 31, 2009).

### **Accuracy**

*The degree to which the data correctly describes what it was intended to measure.*

### **Non-sampling errors**

*Over-coverage—the possibility of including data from outside of the target population.*

- Some organisations that reported figures from the 2009 calendar year had since ceased operating in the outdoor sector.
- Some responses from university-based RTOs may have supplied figures beyond their RTO remit.



*Under-coverage—the possibility of not obtaining data from desired elements of the target population.*

- It is likely that not all relevant contacts were reached with the survey invitation.
- Some participants who registered partial survey completions did not later return to finalise a complete response.

*Measurement error—occurrences of respondents misunderstanding a question, not completely understanding the intent of a question, or finding a question too difficult to answer.*

- An apparent lack of clarity around the term ‘sole trader’—namely that some portion of those who identified themselves as being ‘sole traders’ expressed uncertainty with how to proceed on questions pertaining to staffing arrangements. As a result, some members of this cohort typically either sought further assistance or opted out of the survey.
- The qualification profile questions may have produced varying interpretation among respondents. Although it was acknowledged that the NOSS10 questionnaire would only capture the occurrence of a given qualification (at best, based on one person’s knowledge) and not the number of people holding that qualification, the effect of the following is unknown:
  - Omitting some levels within the Australian Qualification Framework (AQF) may have influenced the responses provided (e.g. Graduate Diploma).
  - The clarity of whether or not to include all qualifications that were known or simply those that respondents felt were relevant to the outdoor sector.
  - The clarity of whether to list all qualifications known to the respondent or to simply limit responses to each individual’s highest educational attainment.
  - The extent to which university degrees may have been more memorable and/or more highly-valued by some respondents.

*Non-response—inability to obtain complete data from all selected individuals.*

- Following data cleaning, NOSS10 collected a total of **325** completed responses. Participants that did not answer up to question 32 (the last guaranteed compulsory question) were not included in the results. A preliminary figure—not taking into account all instances of multiple responses and duplicated effort—on the number of partial/incomplete responses is estimated at 74.
- It is apparent that some participants lacked experience in navigating through online surveys and lacked computer literacy. Meanwhile, others appeared to experience unexplainable technical glitches with the online survey, possible due to software or hardware issues with their personal computer.
- Minimal non-response was generated by participants who did not correctly follow the instructions supplied, particularly in relation to the redirection notice regarding the updated hyperlink.
- Other partial/incomplete responses may point to participants who could not recall answers, could not access answers or did not possess sufficient knowledge to provide answers at the time of completion.

## Adjustments to data

As an extension of its data management strategies employed during the 'field' stage of NOSS10, SSA ran a quality check on the survey completions data only once the survey was closed (on October 20, 2010). This involved:

- Checking for multiple responses from the one organisation and analysing the consistency between the multiple responses of an individual organisation. This included excluding any answer outcome where the multiple responses generated conflict—namely in Yes/No answer options.
- Where multiple responses were evident, selecting the most appropriate set of answers provided by such an organisation as its official response and eliminating data duplication.
- Scrutinising figures that appeared obviously incongruous with the rest of the data received and/or figures that demonstrated a clear misunderstanding of a question's intent.
- Scanning for evidence of 'satisficing' (i.e. half-hearted responses, incorrect completion due to lack of commitment or interest).

## Coherence

*The degree the data can be brought together with other statistical information in a broad framework and over time.*

As this was a one-off exploratory questionnaire, changes to classifications or concepts over time are not applicable.

## Interpretability

*Availability of metadata to explain the data.*

### Internal accessibility of documentation for data collection

This Quality Declaration was originally made available to members of SSA and OCA only.

### External accessibility of documentation for data collection

The Quality Declaration is now publicly available via the final report for NOSS10.

## Accessibility

*Ease of obtaining the data.*

### Ease of obtaining permission to access data

Only SSA and designated OCA representatives who need access to the data in the course of their duties are provided with permission to access the unit record data.

**Ease of obtaining data without permission**

Data access is password-protected and stored on a secure server.

**Knowledge that data exists**

Information regarding NOSS10 was originally made available primarily through the SSA website. Other dissemination has occurred via:

- SSA's 2011 Environmental Scan and associated activities
- an Outdoor Industries session in Victoria organised by Verve (now SkillsHub)
- the Queensland Outdoor Recreation Federation (QORF) 2010 Outdoor Industry Survey Report and their 2010 Annual General Meeting.
- presentations during 2011 at the Victorian Outdoors Conference, the Outdoor Recreation Industry Conference (NSW) and the True North Outdoors Conference (QLD).

**Appendix Three: Questionnaire (Acrobat format)**

(please refer to next page)

## Survey: Outdoor Industries (Phase 1)

Service Skills Australia (SSA) together with the Outdoor Council of Australia (OCA) has developed a survey that we are asking **one (1) representative from your organisation/company to complete**.

This survey represents the first step in quantifying the outdoor industries. Therefore, in order to describe our industry as accurately as possible, **it is crucial that as many employers and operators in our industry complete the survey**.

SSA will be acting as host of the data and complying with all privacy requirements. The outcomes and results of the data will be shared with OCA executive to identify key messages and subsequently be shared with the industry more broadly.

This survey will be **active until Wednesday October 20, 2010** and takes approximately **15 minutes to complete**. Once completed, please return this form to **Dr Andrew Pleffer**, Research and Policy Advisor at Service Skills Australia, via email or post:

Level 10  
171 Clarence St  
Sydney NSW 2000

[apleffer@serviceskills.com.au](mailto:apleffer@serviceskills.com.au)

*We thank you for your support and look forward to sharing the outcomes of this important research with you in the near future.*

## Instructions

To complete the survey in the correct sequence, answer each of the mandatory questions (marked **\***) and follow the **red skip instructions**. In the absence of skip instructions, please respond to the questions in chronological order.

Check boxes in this form start off as being blank (☐). In the questions where you need to fill in a check box in order to register an answer, simply double-click on the ☐ and then select "Checked" inside the prompt box that appears. The result will be a completed check box: ☒. To uncheck a box, double-click on the ☒ and then select "Not checked" inside the prompt box.

Similarly, some text box questions start off as being empty ( ). In order to enter a typed response for such questions, you will first need to double-click on the shaded area and then enter your response under "Default text" in the prompt box that appears. To delete a typed response, double-click on the shaded area and delete the response entered under "Default text".

Alternatively, you may wish to complete by hand and scan your completed questionnaire before forwarding your responses to Service Skills Australia as per the contact details on this page.

**NOTE: IF COMPLETING BY HAND, PLEASE PRINT THIS SURVEY IN COLOUR.**

1. Please enter your **email address**.\*

2. Please enter the **full name of your organisation/company**.\*

Please do not enter acronyms (e.g. 'SSA').

3. Please identify the **state(s)** and/or **territory(ies)** in which your organisation/company is based.\*

☐<sub>1</sub> NSW

☐<sub>5</sub> SA

☐<sub>2</sub> VIC

☐<sub>6</sub> TAS

☐<sub>3</sub> QLD

☐<sub>7</sub> ACT

☐<sub>4</sub> WA

☐<sub>8</sub> NT

4. Is your organisation/company a **school** or **registered training organisation (RTO)**?\*

Please select one option only.

☐<sub>1</sub> School

☐<sub>2</sub> Registered training organisation (RTO)

☐<sub>3</sub> Both

☐<sub>4</sub> Neither

5. Please describe the **ownership structure of your organisation/company**.\*

You may enter further information in the "**Additional comments**" textbox provided.

Please select one option only.

☐<sub>1</sub> Government agency / Public sector

☐<sub>2</sub> Not-for-profit organisation

☐<sub>3</sub> Commercial enterprise

☐<sub>4</sub> If other, please specify

**Additional comments**

6. Does your organisation provide **outdoor and adventure activities**?\*

☐<sub>1</sub> Yes → **Go to Question 7 (Page 4).**

☐<sub>2</sub> No → **Go to Question 10 (Page 6).**

## 7. You answered "Yes" to question 6.

From the list below, please **select all of the outdoor and adventure activities provided by your organisation/company.\***

*If any relevant options are not listed, please enter these in the "Other" textbox provided.*

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> 1 Abseiling                | <input type="checkbox"/> 16 Fossicking/collecting           | <input type="checkbox"/> 31 Rafting                     |
| <input type="checkbox"/> 2 Archery                  | <input type="checkbox"/> 17 Four-wheel-driving              | <input type="checkbox"/> 32 Rogaining                   |
| <input type="checkbox"/> 3 Ballooning               | <input type="checkbox"/> 18 Hang-gliding/Para-gliding       | <input type="checkbox"/> 33 Ropes courses               |
| <input type="checkbox"/> 4 Boating/sailing          | <input type="checkbox"/> 19 Horse riding                    | <input type="checkbox"/> 34 Sailboarding                |
| <input type="checkbox"/> 5 Bungy jumping            | <input type="checkbox"/> 20 Hunting/shooting (recreational) | <input type="checkbox"/> 35 Scuba diving                |
| <input type="checkbox"/> 6 Bushwalking              | <input type="checkbox"/> 21 Jet skiing                      | <input type="checkbox"/> 36 Skateboarding/rollerblading |
| <input type="checkbox"/> 7 Camping                  | <input type="checkbox"/> 22 Kayaking                        | <input type="checkbox"/> 37 Skiing                      |
| <input type="checkbox"/> 8 Canoeing                 | <input type="checkbox"/> 23 Kite flying                     | <input type="checkbox"/> 38 Snorkelling                 |
| <input type="checkbox"/> 9 Canyoning                | <input type="checkbox"/> 24 Kite surfing                    | <input type="checkbox"/> 39 Snowboarding                |
| <input type="checkbox"/> 10 Caving                  | <input type="checkbox"/> 25 Motor/trail bike riding         | <input type="checkbox"/> 40 Surfing                     |
| <input type="checkbox"/> 11 Climbing                | <input type="checkbox"/> 26 Mountain bike riding            | <input type="checkbox"/> 41 Team building/initiatives   |
| <input type="checkbox"/> 12 Conservation activities | <input type="checkbox"/> 27 Nature studies                  | <input type="checkbox"/> 42 Tour guiding                |
| <input type="checkbox"/> 13 Cycling                 | <input type="checkbox"/> 28 Orienteering                    | <input type="checkbox"/> 43 Waterskiing                 |
| <input type="checkbox"/> 14 Expeditioning           | <input type="checkbox"/> 29 Parachuting                     | <input type="checkbox"/> 44 Windsurfing                 |
| <input type="checkbox"/> 15 Fishing                 | <input type="checkbox"/> 30 Picnicking                      | <input type="checkbox"/> 45 Yachting                    |

☐46 If other, please specify

8. Does your organisation/company also provide **services other than the delivery of face-to-face outdoor programs?\***

*Examples may include – but are not necessarily limited to – retail, tourism, hospitality, education and training, etc.*

- ☐1 Yes → **Go to Question 9 (Page 5).**
- ☐2 No → **Go to Question 11 (Page 7).**

9. You answered “Yes” to question 8.

Please enter a **brief description of the other services** that your organisation/company provides.\*

*Examples may include - but not necessarily be limited to - retail, tourism, hospitality, education and training, etc.*



**Go to Question 11 (Page 7).**



10. You answered “No” to question 6.

Please enter a **brief description of the services** that your organisation/company does provide.\*

*Examples may include – but not necessarily be limited to – retail, tourism, hospitality, education and training, etc.*



**Go to Question 11 (Page 7).**

11. Are you a **sole trader** or does your organisation/company have paid staff and/or volunteers?\*

- ☐<sub>1</sub> Yes, I am a **sole trader** → [Go to Question 12 \(Page 8\).](#)
- ☐<sub>2</sub> No, I have staff and/or volunteers → [Go to Question 14 \(Page 9\).](#)

12. Regarding qualifications that are relevant to the activities of your organisation, please indicate **what qualifications you hold**.

To answer this question, please enter the title(s) of the qualification(s) into the relevant textboxes provided below (e.g. "Outdoor Recreation", etc.).

If a qualification type is not listed, please enter this information into the text box labelled "Other".

|                        |  |
|------------------------|--|
| Certificate 2 in...    |  |
| Certificate 3 in...    |  |
| Certificate 4 in...    |  |
| Diploma in...          |  |
| Advanced Diploma in... |  |
| Degree in...           |  |
| Other...               |  |

13. Regarding your organisation's/company's staffing requirements, **how many additional paid staff do you...**

|  |  |
|--|--|
| <u>need now?</u>                             |  |
| think you will <u>need in 1 year's time?</u> |  |
| think you will <u>need in 5 years' time?</u> |  |



Go to Question 32 (Page 15).

14. Regarding the 2009 **calendar year** (Jan-Dec), are you able to **identify** or **estimate** the **number of paid staff** (including contractors) that worked in or provided services to your organisation/company?\*

- ☐<sub>1</sub> I am able to provide a figure that is **100% accurate**
- ☐<sub>2</sub> I am able to provide a figure that **may not be 100% accurate**, but is a **reliable estimate**
- ☐<sub>3</sub> I am able to provide a **rough estimate only**
- ☐<sub>4</sub> N/A: My organisation has **no paid staff** → **Go to Question 23 (Page 12).**

15. Using the four (4) employment categories provided, please state the **number of paid staff** that worked in your organisation for the 2009 calendar year.\*

*Please ensure that the data you enter here are the most accurate figures available.*

Full-time

Part-time

Casual

Contracted

16. Using the four (4) employment categories provided (similar to above), how many hours do your **paid staff** (on average) work in a week?\*

*For example, full-time = 40; part-time = 22; etc.*

Please feel free to offer further detail in the "**Additional comments**" textbox provided.

Full-time

Part-time

Casual

Contracted

**Additional comments**

17. Please estimate the **average duration of employment** (in years and/or months) for the full-time and part-time paid staff only who work in your organisation.

|                                | <u>Years</u> | <u>Months</u> |
|--------------------------------|--------------|---------------|
| Full-time (average job tenure) |              |               |
| Part-time (average job tenure) |              |               |

18. Please feel free to offer any further detail on the average tenure/duration of employment of your organisation's/company's *full-time and part-time staff only*.

|  |
|--|
|  |
|--|

*Some answers in the question below call for estimates based on anticipated growth.*

*If you feel you are unable to provide a reasonably accurate figure for a question, please leave that particular numeric box blank and enter a brief explanation in the "**Additional comments**" textbox provided.*

19. Regarding your organisation's/company's staffing requirements, how many additional **paid staff** do you...

|                                       |  |
|---------------------------------------|--|
| need now?                             |  |
| think you will need in 1 year's time? |  |
| think you will need in 5 years' time? |  |

**Additional comments**

|  |
|--|
|  |
|--|

20. Does your organisation/company provide access to **any formal training or professional development** for your paid staff?\*

☐<sub>1</sub> Yes

☐<sub>2</sub> No

21. Using the following rating scale, **how familiar are you** with the qualifications held by paid staff in your organisation/company?\*

*Please select one option only.*

☐<sub>1</sub> Extremely familiar

☐<sub>2</sub> Very familiar

☐<sub>3</sub> Moderately familiar

☐<sub>4</sub> Slightly familiar

☐<sub>5</sub> Not familiar at all

22. Regarding **qualifications that are relevant to the activities of your organisation**, please indicate which qualifications are held by paid staff in your organisation.

*To answer this question, please enter the title(s) of the qualification(s) into the relevant textboxes provided below.*

*If a qualification type is not listed, please enter this information into the text box labelled "Other".*

|                        |  |
|------------------------|--|
| Certificate 2 in...    |  |
| Certificate 3 in...    |  |
| Certificate 4 in...    |  |
| Diploma in...          |  |
| Advanced Diploma in... |  |
| Degree in...           |  |
| Other...               |  |

23. Regarding the 2009 **calendar year** (Jan-Dec), are you able to **identify** or **estimate** the **number of (unpaid) volunteers** that worked in or provided services to your organisation/company?\*

- ☐<sub>1</sub> I am able to provide a figure that is **100% accurate**
- ☐<sub>2</sub> I am able to provide a figure that **may not be 100% accurate**, but is a **reliable estimate**
- ☐<sub>3</sub> I am able to provide a **rough estimate only**
- ☐<sub>4</sub> N/A: My organisation has **no (unpaid) volunteer staff** → **Go to Question 32 (Page 15).**

24. Please state the **number of unpaid volunteers** that worked in your organisation/company for the 2009 calendar year.\*

*Please ensure that the data you enter here are the most accurate figures available.*

25. In an average week, what is the combined total number of hours worked by your **(unpaid) volunteers**?\*

*For example, if your organisation/company has four (4) volunteers with each contributing five (5) hours of work on a weekly basis, the answer required for this question would be "20" (i.e. 4 vols x 5 hrs = 20 hrs).*

Please feel free to offer further detail in the "**Additional comments**" textbox provided.

Total volunteer hours per week

**Additional comments**

26. Please estimate the **average duration of employment** (in years and/or months) for the (unpaid) volunteers only who work in your organisation/company.

|                              | <u>Years</u> | <u>Months</u> |
|------------------------------|--------------|---------------|
| Average volunteer job tenure |              |               |

27. Please feel free to offer any further detail on the average tenure/duration of employment of the **(unpaid) volunteers** working in/providing services to your organisation/company.

*Some answers in the question below call for estimates based on anticipated growth.*

*If you feel you are unable to provide a reasonably accurate figure for a question, please leave that particular numeric box blank and enter a brief explanation in the “**Additional comments**” textbox provided.*

28. Regarding your organisation’s/company’s staffing requirements, how many additional **unpaid volunteers** do you...

|  |  |
|--|--|
| <u>need now?</u>                             |  |
| think you will <u>need in 1 year’s time?</u> |  |
| think you will <u>need in 5 years’ time?</u> |  |

**Additional comments**



29. Does your organisation/company provide access to **any formal training or professional development** for your (unpaid) volunteers?\*

☐<sub>1</sub> Yes

☐<sub>2</sub> No

30. Using the following rating scale, **how familiar are you** with the qualifications held by (unpaid) volunteers in your organisation/company?\*

*Please select one option only.*

☐<sub>1</sub> Extremely familiar

☐<sub>2</sub> Very familiar

☐<sub>3</sub> Moderately familiar

☐<sub>4</sub> Slightly familiar

☐<sub>5</sub> Not familiar at all

31. Regarding **qualifications that are relevant to the activities of your organisation**, please indicate which qualifications are held by (unpaid) volunteers in your organisation.

*To answer this question, please enter the title(s) of the qualification(s) into the relevant textboxes provided below.*

*If a qualification type is not listed, please enter this information into the text box labelled "Other".*

|                        |  |
|------------------------|--|
| Certificate 2 in...    |  |
| Certificate 3 in...    |  |
| Certificate 4 in...    |  |
| Diploma in...          |  |
| Advanced Diploma in... |  |
| Degree in...           |  |
| Other...               |  |

32. Regarding the 2009 **calendar year** (Jan-Dec), are you able to provide accurate figures or estimates for the **number of individual people who used the services of your organisation/company?**\*

- ☐<sub>1</sub> I can provide figures that are **100% accurate**
- ☐<sub>2</sub> I can provide figures that **may not be 100% accurate**, but are **reliable estimates**
- ☐<sub>3</sub> I can provide a **rough estimate only**
- ☐<sub>4</sub> Neither, I am **unable to provide any numbers** → **Go to Question 34 (Page 16).**

33. Please enter your **accurate figure** or **estimate** for the number of people who used the services of your organisation in the 2009 calendar year.\*

*Please enter your response using numbers only.*

34. For the 2009 calendar year, did your organisation receive any funding or financial assistance from the government?

- ☐<sub>1</sub> Yes  
☐<sub>2</sub> No  
☐<sub>3</sub> Not sure

35. This question is optional.

What was your **total turnover** for the 2009 calendar year?

Total turnover (\$)

36. This question is optional.

For the 2009 calendar year, what was your **total expenditure on salaries and wages** (including superannuation, leave loading and workers' compensation)?

Total salaries & wages expenditure (\$)

37. This question is optional.

Finally, do you have any additional comments that you would like to make about the outdoor industries or any particular questions in this survey?

*If not, please leave textbox blank.*

Thank you for your participation.

*Sincerely*

*Service Skills Australia and Outdoor Council of Australia.*