QORF

Queensland Outdoor Recreation Federation Inc.

STRATEGIC PLAN 2008 - 2010

Developing the Outdoor Recreation Industry in Queensland

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Preamble

The **Queensland Outdoor Recreation Federation** (QORF) was formed in 1996, by a coalition of groups involved in outdoor recreation activities, to represent and advocate on behalf of stakeholders involved in the outdoor industry. QORF is now regarded as the peak body representing the interests of the outdoor recreation industry in this state.

One of the key roles for QORF is to be a hub between the outdoor recreation industry and all levels of government to contribute to the resolution of outdoor recreation - related issues. As such, QORF represents the diversity of opinions across the industry on any issue, and does not, on many issues, achieve consensus. QORF provides opportunities for stakeholders within the outdoor recreation industry to meet with key policy makers, and holds forums to encourage discussions on the issues that affect the industry.

WHAT IS THE OUTDOOR RECREATION INDUSTRY?

As its name and Mission indicates, QORF's primary role is with "outdoor recreation" and over the years this role has come to embrace all facets of the industry in which an outdoor (or simulated outdoor) recreation activity is conducted.

The recently released *SEQ Regional Outdoor Recreation Strategy Discussion Paper*[1] defines outdoor recreation as including a range of leisure, recreation or sport activities, undertaken in natural, rural and urban open space. Outdoor recreation activities require open space but, for safety or sustainability, may need built facilities such as amenities blocks, camping areas, car parks and tracks for walking, cycling, horse riding or off-road vehicles. Outdoor recreation activities include but are not limited to:

- **Abseiling**
- **Base-jumping**
- **Cycling:** road bikes – touring and road racing and mountain bikes – touring, downhill, mountain, cross-country and trials
- **Camping:** tent, caravan and campervan
- **Caving:** including cave diving
- **Climbing:** rockclimbing, canyoning and mountaineering
- **Canoeing and kayaking:** white water, flat water, surf and sea
- **Driving off-road vehicles** – touring, racing and challenge courses
- **Fishing:** line, spear and net
- **Gliding:** hang gliding and paragliding
- **Horse riding:** recreational trail riding and endurance competition
- **Hunting and shooting:** with firearms, spears, bow and arrows
- **Riding off-road motorcycle-like vehicles:** trail bikes, motocross bikes, trikes, quads, etc- recreational rides, touring, enduro and motocross
- **Picnicking**
- **Power boating:** motor boats, jet skis, etc. – recreational touring, racing and other forms of competition
- **Sailing:** yachts, sailboards, kiteboards and any other wind-powered vessels
- **SCUBA diving and snorkelling**

[1] Source: OUM (2007) SEQ Regional Outdoor Recreation Strategy Discussion Paper

- **Surfing:** surfboards, boogie boards, wave skis and surf skis
- **Swimming:** body surfing, swimming in rivers, creeks, waterholes and the sea
- **Walking:** walking, running, orienteering, rogaining and bushwalking
- **Water-skiing:** skiing, tobogganing, wake-boarding and para-sailing

This definition has been developed to align with planning processes and Regulatory Provisions within the *SEQ Regional Plan 2005-2026*. As a consequence, some activities such as parachuting and climbing or abseiling on artificial surfaces (eg. climbing walls) have been excluded because they take place in purpose-built facilities. QORF endorses a more inclusive definition of the industry which incorporates outdoor activities on 'simulated' surfaces and in purpose-built facilities.

Outdoor recreation activities are undertaken for a range of purposes including:

- **Non-competitive outdoor recreation** – activities in a non-competitive context (for example, bushwalking, bicycle touring, picnicking and camping)
- **Outdoor sports** – formally organised, competitive events such as orienteering, rogaining, surfing competitions, long distance off-road motorcycle racing, car rallies and endurance horse riding
- **Outdoor and environmental education** – using outdoor recreation activities to help achieve formal and informal educational outcomes
- **Health and lifestyle improvement** – active forms of outdoor recreation (walking, riding, canoeing, etc.) improve health and wellbeing or as part of a balanced lifestyle.
- **Recreation-based counselling** – using outdoor recreation activities for therapeutic outcomes – improved physical, psychological, social and spiritual well-being.
- **Recreation tourism, eco-tourism and nature-based tourism** – outdoor recreation activities provided by commercial tourism enterprises

This diversity within the industry is represented in Figure 1. As the focus of the activities and organisations which QORF increasingly represents is not purely "recreation", but encompasses education, sport, tourism, etc, a more meaningly way to refer to the industry is to identify what it has in common – the outdoor (or simulated outdoor) recreation activity. As a consequence, throughout this Strategic Plan, the term outdoor recreation industry and outdoor recreation activity is used to be an 'all encompassing' term to incorporate all facets of the industry and the clients which QORF represents.

Figure 1: QORF's primary stakeholders

Strategic Plan Scope

This Strategic Plan was developed through mid-2007 with input from the wider outdoor recreation industry and other interested parties.

This Strategic Plan sketches the current trends and future directions for the outdoor recreation industry in Queensland and maps out a place and role for QORF. The specific outcomes and initiatives detailed toward the end of this document will be implemented between 2008 and 2010.

The key challenges identified by this plan are:

1. maximising the usage of resources that might be applied to the outdoor recreation industry.
2. enabling additional places for outdoor recreation activities including private property, to cater for the expected growth in population and participation.
3. engaging with the community to enhance their appreciation of outdoor recreation.
4. building the capacity of outdoor recreation activity service providers.

It is envisaged that for all of the elements of this plan to be realised, QORF will need to enlist the support of a number of strategic partners. These partners include State and local governments, non Government organisations, QORF members and non members and consultants, including the services of Outdoors Queensland. Outdoors Queensland (OQ) was established in 2006 as a private (essentially non trading) company which administers a Unit Trust which lists QORF as the sole unit holder and beneficiary of any profits. (Appendix 1 details the role of Outdoors Queensland and its relationship with QORF). The outcomes within this Strategic Plan focus on six key areas:

- Leadership
- Places to Recreate
- Partnerships
- Community Engagement
- Innovation and Quality
- Management Excellence.

QORF and Industry Overview

In undertaking its role as an industry peak body, the Queensland Outdoor Recreation Federation is directed by its Mission and Values

QORF Mission and Values

The Queensland Outdoor Recreation Federation affirms the value and encourages the opportunity for all people to recreate outdoors.

The Queensland Outdoor Recreation Federation Inc. values:

- outdoor recreational experiences
- the intrinsic worth and fragility of all the natural environments;
- equity
- diversity of:
  - environments
  - groups/individuals
  - activities
  - experiences.

QORF Stakeholders/Clients

Members

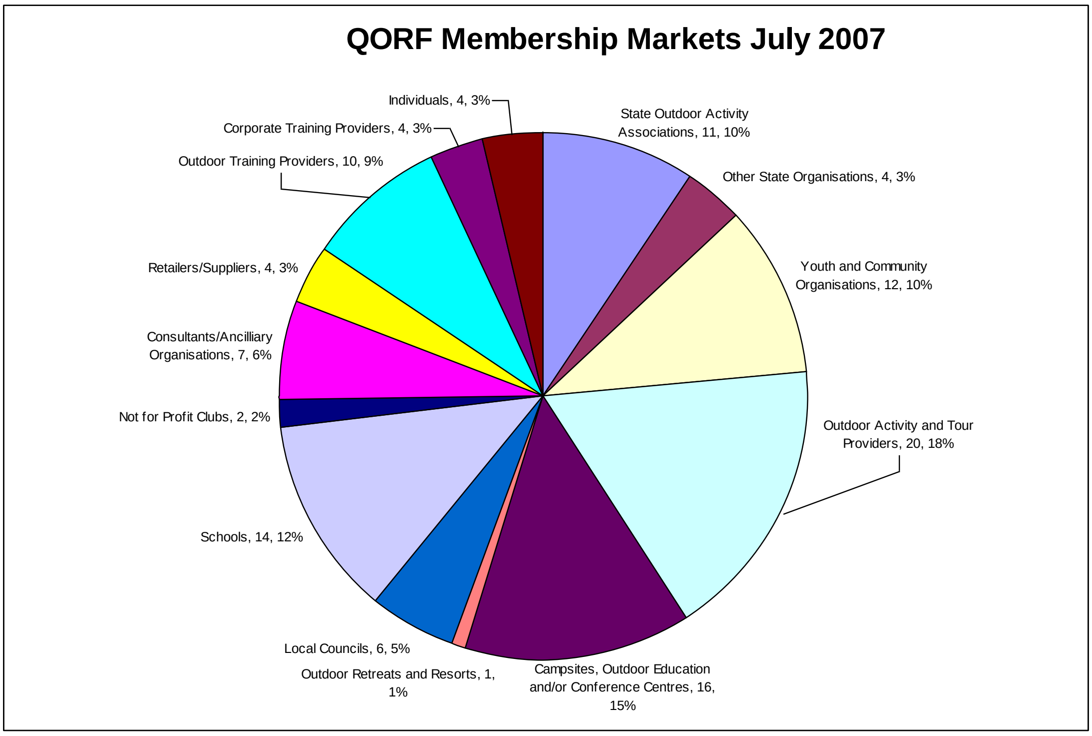
Membership of QORF is open to all individuals, enterprises and organisations with an interest in outdoor recreation activities. Members include:

- State Associations
- Youth and Community Organisations
- Outdoor Activity and/or Tour Providers
- Campsites, Outdoor Education and/or Conference Centres
- Local Governments
- Schools
- Not for Profit clubs/associations
- Consultants/Ancillary Organisations
- Retailers/Suppliers
- Outdoor Training Providers
- Corporate Training Providers
- Retreats/Resorts
- Individuals (eg. participants, leaders, guides, instructors)

Figure 2 depicts QORF Membership Market Subsets. A significant component of QORF's human resources are dedicated to advocacy/lobbying and strategic planning within the State. These initiatives which are undertaken to benefit some or all of QORF's members are labour intensive, and at times yield less visible outcomes or outcomes which take some time to come to fruition.

As the majority of QORF's other products and services currently exist to service the outdoor recreation leaders, instructors and resource managers, these are QORF's primary market segment. Instances within the market where outdoor recreation leaders, instructors and resource managers exist are represented in Figure 3 below, with QORF market share being calculated on its current membership levels. QORF to a limited extent provides some products and services to outdoor recreation participants. These products and services include information on places where they can go to experience an outdoor activity, or related to local access and permitting issues. The cost and resources associated with accessing this particular market is significantly greater than QORF's primary market.

Figure 2: QORF Membership Market Subsets



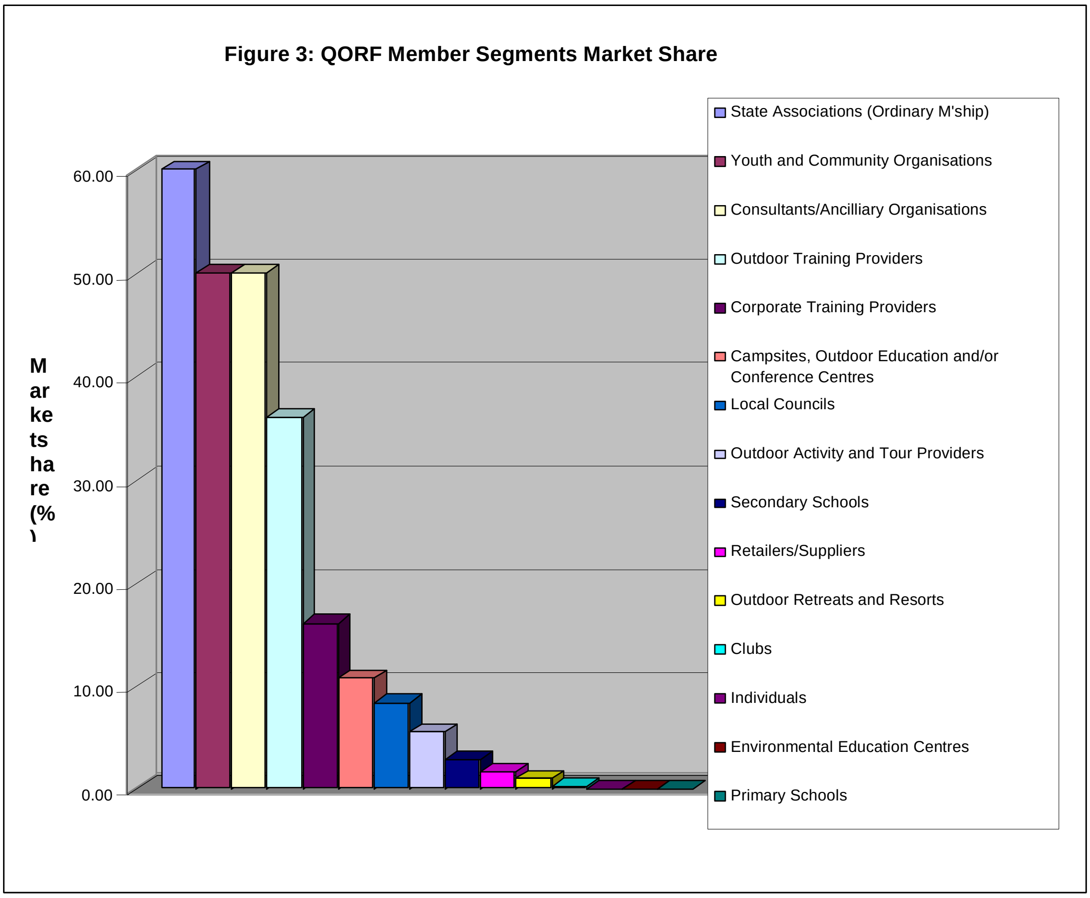


Figure 3 above depicts the proportions of each market subset that supports QORF through membership. Currently Outdoor Activity and Tour Providers constitute the largest market (18%), with potential for QORF to increase its marketshare within this subset (refer to Figure 2). The next largest buying subset consists of Campsites, Outdoor Education and Conference Centres (15%) followed by Schools (12%).

QORF's relatively low marketshare of a range of subsets present an excellent opportunity for the Federation to increase membership across these markets. However, the Federation should also assess the viability of each of these subsets on the following criteria:

- Current size of the market subset and whether subset is growing or declining
- Costs and resources associated with breaking into market subset
- Costs (including resources) associated with servicing market subset
- Compatibility with QORF's current business ie sufficient products and services available to effectively meet the needs of market subset
- Ability of QORF to satisfy needs of market subset
- Lifetime value of market subset considering transaction spend and frequency of spending

Non member Stakeholders

As QORF's role is to be a hub between the outdoor recreation industry and all levels of government and to contribute to the resolution of outdoor recreation-related issues, QORF's stakeholders are virtually infinite. However, QORF establishes different relationship with different stakeholders; as a client, a consultant, a service provider, etc. Appendix 2 provides an indication of the career paths within the industry and, more importantly, indicates some of the potential stakeholders of QORF.

QORF is also the recognised State Division of the Outdoor Council of Australia (OCA), the national peak body for the industry.

INDUSTRY CHARACTERISTICS

The outdoor recreation industry is still broadly a fragmented industry composed of a large number of small and medium-sized companies and not-for-profit clubs and associations. The reasons for this include the low barriers to entry (due to lack of economies of scale) which in turn permits constant entry by new companies and associations. Disparate customer demand results in often specialized service provisions - small job lots - no room for mass-production, no economies of scale / scope.

In terms of the overall lifecycle, the outdoor recreation industry straddles the embryonic[2] – growth[3] stages of development as it experiences increasing participation (sales), along with the emergence of new forms of outdoor recreation activity (new product development) and entry of new outdoor recreation activity providers (competition).

For those pursuing the outdoor recreation as a recreational pursuit (rather than as an educational or personal develop tool) the typical outdoor recreation customer shifts from one who is technically skilled and tolerant of some degree of 'service flaws' (and normally able to access clubs, 'closed' social networks or specialist businesses) to those who expect equipment to be highly engineered, simple to use and experiences that are easy to access.

While the traditional participant may not be well-heeled, they pursue outdoor recreation activities as part of their lifestyle. They form a relatively small niche market that are prepared to forego other consumer goods and experiences in order to obtain what they need to participate (ie. they perhaps could be said to be not particularly price-sensitive).

[2] Embryonic - just beginning to develop when technological innovation creates new market or product opportunities

[3] Growth - first-time demand is expanding rapidly as many new customers enter the market

QORF ROLE

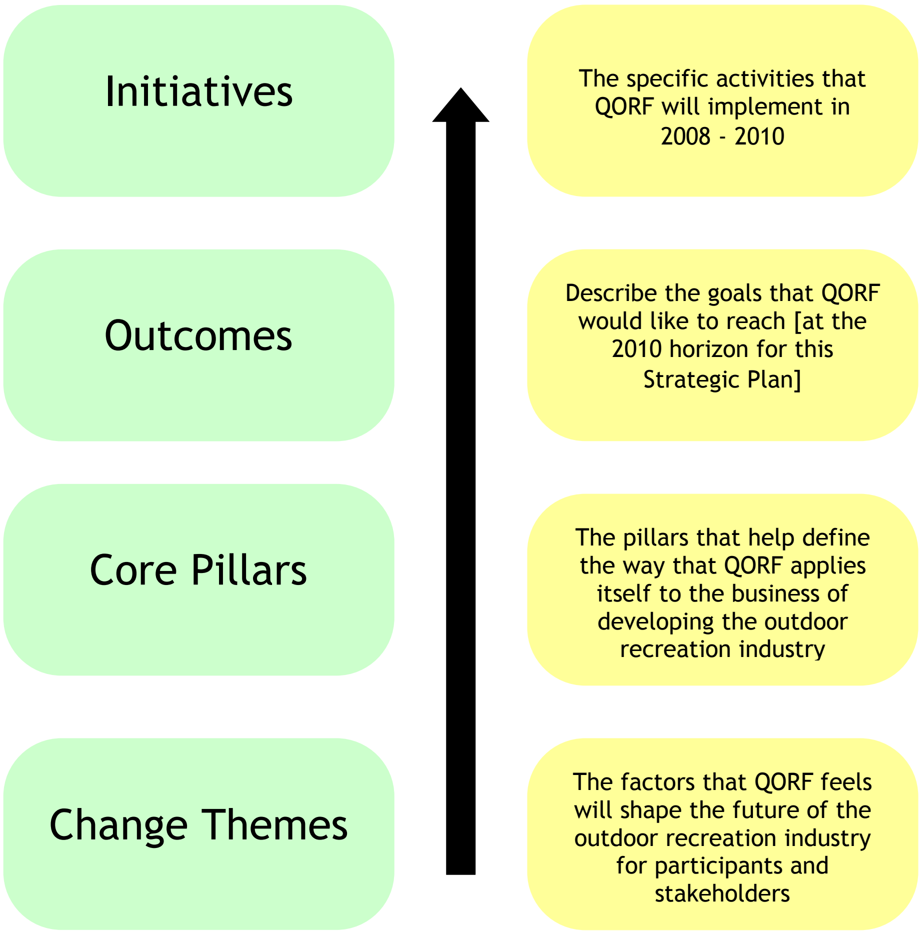
QORF represents the industry on an ongoing basis on a range of advisory and working groups (refer Appendix 3). QORF recognises that achieving its mission requires an integrated approach to all the stakeholders that make up the outdoor recreation environment. It is also recognised that QORF must work with a vast number of groups and individuals if it is to achieve its mission to encourage the opportunity for all people to recreate outdoors.

QORF consults with both its members and non-members on a wide range of matters that will impact upon the industry (eg. proposed changes to legislation) and provides input into draft Management Plans (eg. National Parks) in consultation with relevant stakeholder groups. QORF and its members have also been and are currently involved in several projects with outcomes that are relevant to the outdoor recreation industry.

QORF's most important strengths are its people. This is an often over-utilised phrase but in the case of professional service organisations like QORF, transactions with customers rely largely on the human provision of services. Whether it be advocacy, services, consultation, research, project management, developing events or running courses and conferences, people are the common denominator.

QORF is most exposed by the lack of capital and thus resources they have to provide distinctive and innovative products and services. QORF must focus its efforts on those activities most closely associated with industry peak bodies: advocacy, lobbying, provision of services to members, resolution of issues impacting upon members and the broader industry. Priority is directed to those products and services that require minimal staffing hours and outlay for maximum return.

Structure of the QORF Strategic Plan



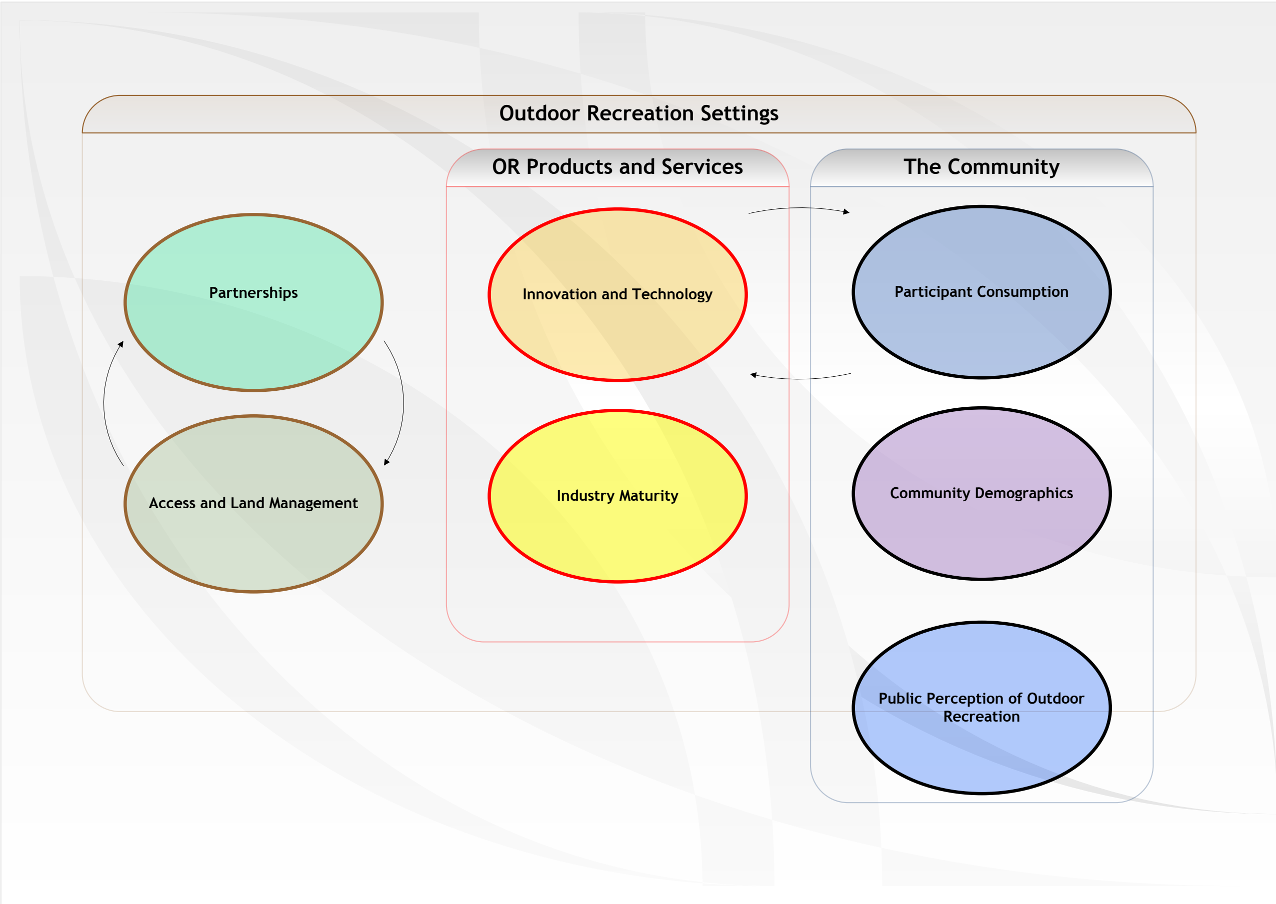
The 2008 – 2010 QORF Strategic Plan comprises several layers that build upon each other to complete a picture of the outdoor recreation industry, the current and future operating environment and the manner in which QORF will respond to that environment to achieve its Mission and core objectives for the industry.

Change Themes highlights the key themes that QORF sees as driving change in where and how places for outdoor recreation are available, how outdoor recreation products and services are 'built' and offered to the public, and why changes in the make-up of the community will ultimately influence the way that outdoor recreation is presented and recognised. The **Core Pillars** represent the key result areas that QORF will apply its resources to in the life of this plan.

The **Outcomes** describe the destination that QORF is aiming for in each of the key result areas.

Finally, the **Initiatives** go some way to describing the specific programs and activities that QORF will implement to help shape the future of the outdoor recreation industry.

Change Themes



This diagram illustrates the change themes identified as impacting upon the industry and driving change in where and how places for outdoor recreation are available, how outdoor recreation products and services are 'built' and offered to the public, and why changes in the make-up of the community will ultimately influence the way that outdoor recreation is presented and recognised.

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ACCESS AND LAND MANAGEMENT

To state the self evident, for outdoor recreation to flourish there need to be places for people to participate in paddling, bushwalking, cycling, climbing and the myriad of other outdoor recreation activities. While these activities nearly always occur in outdoor spaces and often in natural settings, they may also be indoors and in man-made environments. Access to a suitable number and diversity of outdoor places is now and will continue to be the most significant challenge to a viable future for the outdoor recreation industry.

These places (the bush, rivers, and cliffs) are to outdoor recreation what facilities (parks, fields, courts, and gymnasiums) are to sport. You can't have one without the other. Like sport, outdoor recreation sustainability and growth is dependant on availability of appropriate spaces and underpinned by sound planning and management. One point where sport and outdoor recreation depart is that we can't replace or easily rehabilitate a mountain range, or section of coastline, or wild river - the types of places we use for most outdoor recreation activities – when the ones we have are worn out.

Demand for Places for Outdoor Recreation Activities

With population growing (rapidly in SEQ) and land being a finite resource, the amount of this land that might be accessed for any kind of outdoor recreation purpose per person is decreasing. Add to this equation a generally increased demand for some outdoor recreation activities (increased number of participants x increased frequency of participation) and the need to balance the needs of various outdoor recreation activities. A complex stew made more so by challenges such as the drought which can temporarily (eg. there's no water to paddle in) or permanently (eg. changes to public access privileges) prevent participation.

Outdoor recreation is a competitor to other resource users – mining, farming, housing development and so on. Planning and managing for outdoor recreation is no easier than planning and managing land for these other purposes. The outdoor recreation industry needs to ensure that its needs are considered in the same light and at the same time as other "serious" land use decisions. This is especially so given the magnitude and diversity of demand for outdoor recreation opportunities.

A Complicated Land Management Environment

Outdoor recreation services[i] are provided by a plethora of public sector agencies with varying roles based on tenure (responsible for specific types of land), particular locations, thematic use of land (responsible for what activities people participate in), investment and occasional service provision. Past and present legislation, government policy and administrative arrangements and social history shape the responsibilities of these agencies. Additionally, private sector and community groups also provide some places for outdoor recreation activities.

To put this another way, no single agency has the legislative mandate, geographic scope, thematic responsibility or management resources to provide high quality services to the outdoor recreation industry across the full range of activity and setting combinations at all places in the landscape where they might occur. The reality is that without greater collaboration, land managers and planners will not be able to resolve much beyond their own immediate responsibilities, let alone build the case that outdoor recreation activity is a valid land use.

How do we know how much we need if we don't know how much we have?

Given the diversity of public agencies and the array of private owners who have a hand in providing places for outdoor recreation, it is no wonder that its difficult to say with certainty whether we have sufficient space that is well located and appropriate for the diversity of outdoor recreation activities. Resource auditing, using consistent descriptors and working toward a comprehensive outdoor recreation activity inventory, would greatly benefit the industry.

New Generation [Private] Land Tenure Arrangements that Support Outdoor Recreation

With land (and water) being a resource with absolute finite limits and severe restrictions on the capacity of government to acquire / release new land for outdoor recreation activity purposes, the challenge for the industry is to find existing land holdings that can meet the demands of users. With very little of the demand for places for outdoor recreation activities currently being met by private land holdings, they remain a resource well worth exploring.

Political Climate and Government Initiatives

The State Government has identified seven whole of Government priorities. Outdoor recreation is a consideration in three of these priority areas, either in contributing to the achievement of desired outcomes or as a consideration in improved planning:

Priority 1: Improving health care and strengthening services to the community

- support an increased quality of life through disease prevention and active participation

Priority 4: Managing urban growth and building Queensland's regions

- ensure that accelerated growth in South East Queensland is managed in an integrated and coordinated manner

Priority 5: Protecting the environment for a sustainable future

- protect Queensland's unique environmental and heritage assets
- promote sustainable development through responsible use of the State's natural resources

The local government amalgamations and an increasing emphasis on the development of Regional Plans provide opportunities for improved planning for outdoor recreation activities on a regional level.

PARTNERSHIPS

Many of the challenges confronting the outdoor recreation industry are too complex for any one organisation to resolve on their own. QORF will find it near impossible with its limited resource base to fulfil its strategic ambitions alone. However, QORF can be leaders in the evolution of the outdoor recreation industry by building partnerships and coalitions between itself and key government, private and community entities and defining the common purpose that these groups can work towards.

Foremost amongst the challenges requiring collaborative effort are those related to access and land management. Beyond this, QORF will need to create or encourage formal and informal partnerships between:

- various levels of government who have an interest in investing in or managing resources or services for outdoor recreation.
- various government agencies at the same level – state or local.
- government and community groups -for provision of services and [co]management of land resources.
- government and private sector operators -for provision of services and [co]management of land resources.
- the outdoor recreation industry and compatible industries (eg. tourism[ii], fitness) with an interest in driving community change (eg. physical activity levels).

With local government authorities (LGAs) one of the more significant players in the provision of places for outdoor recreation, it is uncertain the extent to which progress will be made given the phase of instability associated with the amalgamation of councils across the state. Many of these amalgamations will occur in areas of the state where significant outdoor recreation activity occurs.

Partnerships can benefit all outdoor recreation industry stakeholders by firstly sharing problems and their solutions, thus achieving "economies of scale" associated with both responsibility and resources. Beyond bringing more resources to the table, partnerships can expand the audience for any initiative – be that limited to the immediate partner or to third party audiences including the community. Partnerships offer all parties a kind of credibility they might not have on their own. Typically, the community perceives that initiatives have more merit if they go beyond the immediate benefit of one benefactor (win:win). Credibility in the eyes of the public translates to believability, which has to be present to motivate a change in behaviour.

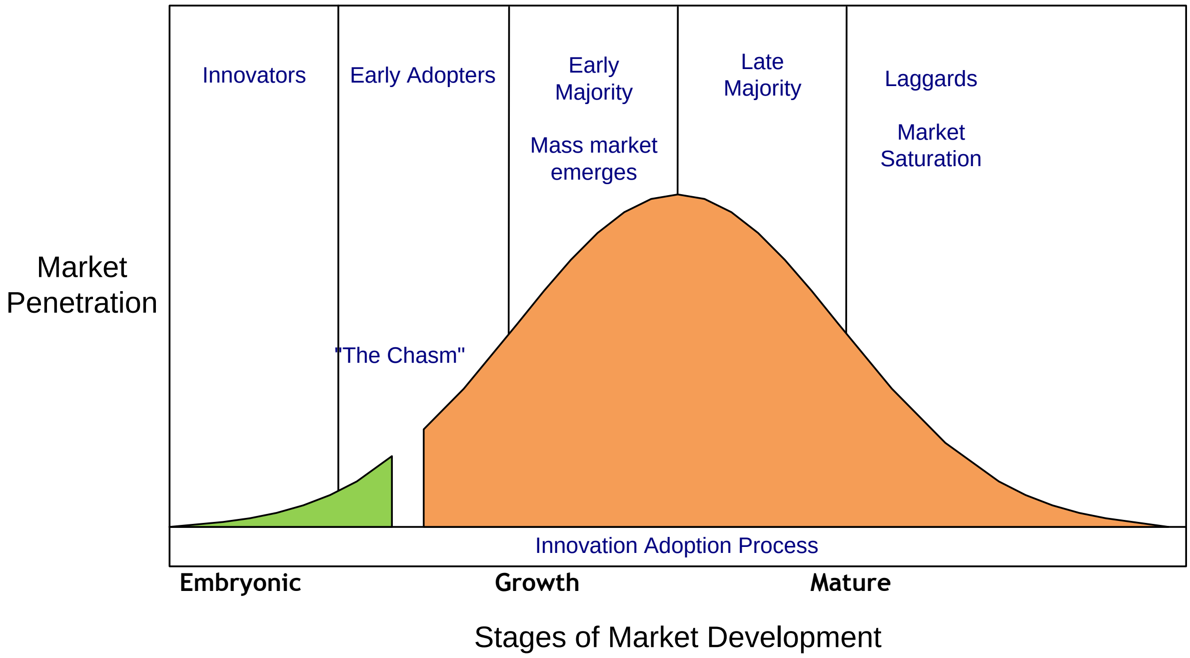
Partnerships with the outdoor recreation industry, either through QORF or directly with industry, are integral to the success of initiatives identified within the SEQ Regional Outdoor Recreation Strategy Discussion Paper and by State government (eg. some of the physical activity outcomes to be achieved by the Department of Local Government, Sport and Recreation)

INDUSTRY MATURITY

All industries progress through a life cycle from infancy through maturity. The outdoor recreation industry is a relatively immature industry compared to manufacturing industries like automotive or even related service industries like tourism. Like all maturing industries, there is going to be some growing pains along the way.

Some of the problems that beset immature industries include limited performance and poor quality of the first products / services; customer unfamiliarity with what the new product / service can do for them; poorly developed distribution channels; lack of complementary products and high production costs.

As well as resolving 'internal' (product / service) challenges, enterprises in immature industries need to build a market that is capable of sustaining their business and allow for future growth. This is illustrated in the diagram below that compares the stages of market development with market penetration. The curve indicates the broad consumer groups and their relative adoption of innovative products / services.



The challenge for immature industries is to bridge the chasm between the small market of innovators, into a phase of selling to early adopters. Early adopters represent not only a larger market share but also a group who influence the mass market. Early adopters are typically:

- Technologically sophisticated and tolerant of engineering imperfections
- Reached through specialized distribution channels
- Relatively few in number and not particularly price-sensitive

To cross the chasm between innovators-early adopters and the early majority enterprises should:

- Correctly identify the needs of the first wave of early majority users then alter the business model in response. This may mean shifting the value chain or distribution channels to reach the early majority.
- Design the product to meet the needs of the early majority so that the product can be modified and produced or provided at low cost.
- Anticipate the moves of competitors.

It is at this point that a mass market typically emerges and operators can start to look forward to profitability and sustainability.

Table 1 indicates some of the proven strategies that organisations and industries adopt in maturing marketplaces.

Table 1: Strategies for application in maturing marketplaces

<table>
<tr><th>Characteristics of Immature Industries</th><th>Generic Strategies</th><th>Solutions</th></tr>
<tr><td>Limited performance and poor quality of the first products / services</td><td rowspan="4">Development of distinctive competencies to differentiate from rivals
Focus on building sustainable competitive advantage.
Requires investment to develop products / services and to hone marketing and customer service capabilities
Strengthen business model to keep up with market and to survive any industry shakeout</td><td>Technological progress makes a product easier to use</td></tr>
<tr><td>Poorly developed distribution channels</td><td>Utilise IT and internet – to develop new business models and reach new clients rapidly (the early majority)
Partnerships, mergers or start new businesses to reach bigger markets to achieve cost leadership</td></tr>
<tr><td>Customer unfamiliarity with what the new product can do for them
Lack of complementary products</td><td>Key complementary products are developed that increase their value to customers</td></tr>
<tr><td>High production costs</td><td>Find ways to reduce production costs allowing organisation to lower prices</td></tr>
</table>

To a reasonable extent these characteristics and solutions hold true for the outdoor recreation industry. Some of the characteristics of outdoor recreation and its progress through an industry life cycle are:

- Outdoor recreation is not homogenous with all operators at the same stage of development. For example, some retailers march in beat with the best of the sector in terms of sophistication (manufacturing, distribution, inventory, marketing) while others remain relatively simple and straightforward.
- Turnover of small business operators who move in, try their luck and move on – sometimes because of poor operating practices, but also because of unsustainable market size.
- Lesser quality of product / service delivery, as enterprises refine their offerings and the industry as a whole adopts uniform standards / expectations. An accompanying pattern is: delivery quality incidents – more regulation – higher prices. Industry shake-out is part and parcel of the maturation process.

The challenge for QORF, along with industry partners, is to strengthen the value proposition so that enterprises are more internally viable and sustainable markets continue to grow. Industry accreditation frameworks and standards are one mechanism that QORF can utilise to help build better businesses and also enable consumers to discern between good and bad service providers. Enhancing staff retention with quality employment practices is crucial especially at a time of global skill shortages.

The industry life cycle, of course, also affects QORF's own offerings and the capacity of prospective customers to buy what QORF has to offer.

Community / Volunteer Outdoor Recreation

Many within our community (particularly children and families) engage with the outdoors and outdoor recreation activities through organised, community groups like the Guides and Scouts. For this group, outdoor recreation remains relatively unchanged - it's about kids, having fun, tradition, love of the outdoors and so on. Most notably however, outdoor recreation sustainability at a local level continues to depend upon a largely unpaid workforce of parents, friends, and committed community members.

Even though there are shifts in the balance toward a greater proportion of paid professionals, the ongoing scarcity of volunteers remains a feature of the landscape and is regarded as the major challenge across the community. Volunteer scarcity is primarily stimulated by:

- a decrease in willingness of community members to contribute their time and efforts, thereby creating a smaller labour pool and ensuring that more productivity is required from remaining workers to maintain, at a minimum, current levels of service.
- an increase in the expectations amongst consumers of the standard to which services should be delivered, therefore requiring higher skilled workers, often paid professionals.

The outdoor recreation industry can't lose sight of the fact that volunteers are just like everyone else in the community. Volunteers can't afford to (or necessarily want to) make significant contributions time wise and are more likely to seek defined / confined volunteer experiences.

PRODUCT INNOVATION AND TECHNOLOGY

In the 21st century, technology has an impact on all dimensions of our lives, including our leisure patterns and activities. Technology, in its more commonly accepted sense, can play a role in improving the quality and consumption rate of outdoor recreation activities. For example, it can act to remove knowledge barriers for current and potential users – where can I go to bushwalk, who can help me to learn how to rockclimb? The internet is a great way of distributing information of this kind.

Beyond this information management concept however, technology and innovation offer additional means of shaping a future for the outdoor recreation industry. Product innovation in materials and manufacturing has opened up a consumer market for outdoor recreation activities that were once the sole domain of private networks of hardcore climbers, paddlers and walkers. For example, contemporary fabrics used in outdoor clothing perform better in weather extremes, canoes are cheaper and lighter, climbing equipment is simpler to use, stronger and safer.

The knowledge economy will have far-reaching consequences and will certainly touch on service industries like outdoor recreation. We often hear that in the service sectors 'our people are our most important asset', yet many organisations grapple with understanding what that really means. Organisational culture, human resource practices, etc all play a role in allowing people to contribute to company success. Critical amongst these factors is the cultivation of an environment in which innovation in service delivery can flourish.

Industry growth is a function of increases in participation and increases in frequency of events. A simple innovation could be to put a 'new' twist on 'old' activities to make the activity more appealing and meet the needs of consumers - easy to learn and access, can be done in a day and require less specialised technical equipment. For example, using 'sit on kayaks' has made sea kayaking more accessible, albeit changing the nature of the activity along the way. The same can be said for resort dives, which happen in a quite restricted range of circumstances.

PARTICIPANT CONSUMPTION PATTERNS

There is now no doubt that participation in outdoor recreation activities is a feature of the Queensland lifestyle. Repeated studies have indicated that Queenslanders have a high level of participation in a variety of outdoor recreation activities, across a range of settings. Potential demand is likely to put more pressure on very natural and totally natural settings[4].

The most recent data available from the 2007 South-East Queensland Outdoor Recreation Demand Study (SEQORDS) indicates that picnicking, water activities, walking / nature study, camping and bicycle riding are the most popular outdoor recreation activities (see Appendix 4). Picnicking remains the most popular activity in South East Queensland, with 58% of respondents having participated in the previous year. However, the median rate of participation was only 3 times per year. Walking or nature study and water activities, on the other hand, whilst slightly less popular (35% and 54% respectively), were engaged in much more frequently, both having a median of 5 and 8 times respectively per year.

Growth in outdoor recreation activity comes from various sources: increases in participation (new participants and cross-over participants), increases in frequency of events (total outings) and

[4] QORF (2002) SEQ Outdoor Recreation Demand Study

increased participation in new activities (the most recent being parkour, trail running, recreational tree climbing).

Increased urbanisation of population has led to greater demand for "done in a day" activities. In turn, this can mean greater pressure on land, air or water resources located closer to metropolitan areas.

Traditionally, outdoor recreation activity was synonymous with the remote bush. But, as the population becomes more sedentary and outdoor enthusiasts increasingly seek activities that can be done in a day, "close to home" outdoor recreation opportunities are more important than ever. The outdoor recreation industry and policy makers must expand their focus to include metro-periphery and urban areas. This trend has more recently been exacerbated by the rising costs of fuel and concern about climate change and carbon emissions.

This trend is echoed beyond outdoor recreation in Federal Government tourism research that indicates that there is:

- A decline in overall domestic travel (though it remains important to people) as Australians travel less and for shorter periods[5].
- A shift toward people wanting quality experiences, which in the context of travel favours international rather than local destinations.

The shift in the composition of Australia's population (see Community Demographics) also has an impact on broad leisure consumption patterns. While there are variances in spending across generations there are some patterns that emerge. For instance, those who are younger and/or under greater than normal pressure allocate more to compensatory items that make them feel better.

Research has indicated that patterns of discretionary spending also vary with age. For example:

- Adultescents[iii] - tended to allocate their discretionary income to goods and services that would reward themselves now like DVDs, nights out, concerts and toys.
- DINKS allocate their discretionary income on goods and services that will secure their future or offer a reward for themselves now. Thus they are likely to allocate discretionary income to all the goods and services described above as well as household furniture and renovations.
- Families are also into securing their future, as well as taking care of their families, with discretionary income more likely to be allocated to home improvements, things for the children and school/university fees.
- Empty Nesters discretionary income is most likely used for investing and travel as well as to help their children establish themselves.

The increase in competition for time is most significantly affected by work hours and impacts on singles and families alike.

US research has indicated that activities that are easy to learn, easy to access, can be done in a day and require less specialised technical equipment will have broad appeal[6]. Outdoor recreation activity providers and stakeholders will need to keep this kind of consumer market information foremost in their minds as they move forward.

The industry should not forget the old adage that it is easier to keep current customers than it is to gain new customers. This holds true in participation. Finding triggers that encourage repeat participation in each activity will be important to growing the market. Repeat participants are more likely to purchase products and encourage friends and family to participate. Therefore, it is necessary to have continual contact with individuals who participate in "trials" to encourage repeat participation.

Tourists also play a significant role in participation in outdoor recreation activities in Queensland. Tourism Qld data indicates that:

- Domestic visitors to Qld participate in adventure activities in the following manner:

[5] Between 2000-01 and 2005-06 the average number of overnight trips per person in Australia declined at an average annual rate of 2%. The decline is largely driven by a large decrease in the number of trips taken by 'Adultescents'.

[6] Outdoor Industry Foundation (2006) Outdoor Recreation Participation Study

- 47% Bushwalking/rainforest walking
- 25% Other outdoor activities (horse-riding, rock climbing, 4WD)
- 26% Water activities (sailing, windsurfing, kayaking)
- 13% Snorkelling
- 13% Surfing
- 4% Scuba

- 42% domestic adventure visitors to Qld are aged (22-44 years); 31% (45-64 years); 22% (15-24 years)
- 63% of domestic adventure visitors are from Qld (Sydney 11%, Melbourne 10%, NSW non Sydney 7%)

Tourism Qld data also indicates that:

- International visitors to Qld participate in adventure activities in the following manner:
  - 72% Bushwalking/rainforest walking
  - 19% Other outdoor activities (horse-riding, rock climbing, 4WD)
  - 17% Water activities (sailing, windsurfing, kayaking)
  - 37% Snorkelling
  - 15% Scuba
  - 13% Surfing
- 43% international adventure visitors to Qld are aged (25-44 years); 28% (45-64 years); 23% (15-24 years)
- 19% of international adventure visitors are from UK; 17% Japan; 14%Europe; 11% NZ, 10% USA; 29% Other
- The market to grow most in the last 2 years is that aged 65+ (up 23.1%)

The release of the *Recreation Tourism Strategy* in 2008 will also have implications for the outdoor recreation industry.

COMMUNITY DEMOGRAPHICS

Population

Queensland's population growth is widely recognised with the attendant pressure on physical and social infrastructure a feature of much social / political commentary and community discussion.

Over the 10 years from 1995-96 to 2005-06 Queensland's population grew by 714,754 people (21%)[7]. In 2005-06 the annual growth was 76,392 (1.9%) which represents a slowing of the more rapid growth experienced over the past five years, with predictions this will decline again to around 1.6% by 2011.

Population growth of this magnitude has an impact on demand for public infrastructure (water, roads) and private assets alike (eg. housing). The implications for outdoor recreation of increasing population includes:

- Increased competition for the same outdoor settings from other users.
- Activity groups migrating to settings where there has previously been no outdoor recreation activity usage, or usage by different groups of users (conflict amongst users).
- Deterioration of the quality of the experience due to overcrowding.

[7] Australian Bureau of Statistics, Regional Population Growth, Australia, Cat. No. 3218.0

Age

Our community is experiencing a gradual ageing of the population with the median age expected to rise from 36 to 45 between now and 2051[8]. The Australian Local Government Association projects that older populations will continue to be concentrated in local government areas that are located along the east coast of Australia, particularly in Queensland. Their research indicates that while the impact on LGAs of ageing will be severe for the likes of care and transport, recreation and leisure are at a moderate risk with an ageing population.

Table 2: Current and projected PIFU demographic data for the 18 local authority areas within the SEQROC area in South East Queensland.[9]

Age classes	0-14	15-24	25-39	40-54	55-64	>64	Total
2001 age class totals	503,665	356,047	551,916	526,342	232,345	294,325	2,464,640
Proportion of 2001 total (%)	20	14	22	21	9	12	100
2016 age class totals	564,147	450,805	665,025	666,885	404,470	514,533	3,265,865
2001 to 2016 multiplier	1.120	1.266	1.205	1.267	1.741	1.748	1.325
Proportion of 2016 total (%)	17	14	20	20	12	16	100
2026 age class totals	590,098	458,525	718,989	728,662	468,232	744,668	3,709,174
2001 to 2026 multiplier	1.172	1.288	1.303	1.384	2.015	2.530	1.505
Proportion of 2026 total (%)	16	12	19	20	13	20	100

However, the impact of an ageing population may be more marked in some areas. (refer Table 3)

Table 3: Current and projected PIFU demographic data for the Redcliffe City Council area.

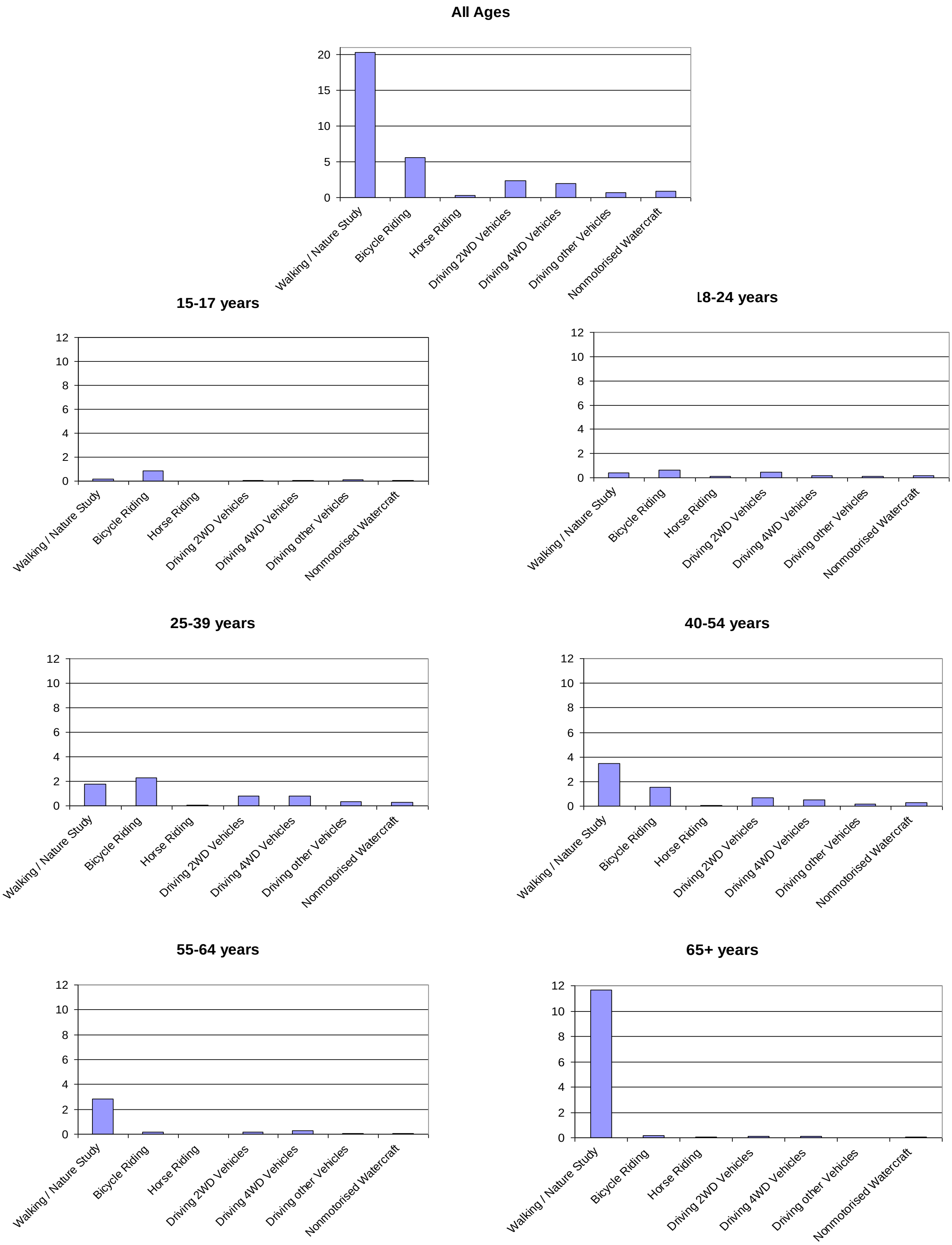
Age classes	0-14	15-24	25-39	40-54	55-64	>64	Total
2001 age class totals	9,080	6,057	8,889	10,656	5,769	9,440	49,891
Proportion of 2001 total (%)	18	12	18	21	12	19	100
2016 age class totals	8,255	6,484	8,520	10,854	8,075	13,573	55,761
2001 to 2016 multiplier	0.909	1.070	0.958	1.019	1.400	1.438	1.118
Proportion of 2016 total (%)	15	12	15	19	14	24	100
2026 age class totals	7,725	5,887	8,304	10,133	8,495	17,022	57,566
2001 to 2026 multiplier	0.851	0.972	0.934	0.951	1.473	1.803	1.154
Proportion of 2026 total (%)	13	10	14	18	15	30	100

8 Australian Local Government Authority. Planning for an Aged Community

9 Office of Urban Management (2007) Review of Recreation Participation and Demand Studies for Trail-based Recreation Activities: Technical Report No 1 to the SEQ Regional Trails Strategy

Current data indicates that the predominant age groups who actively participate in outdoor recreation activities are those in the 25-54 bracket, although participation rates differ from one activity to another.

Figure 4: Total number of annual activity events (millions) for each age class[10]



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[10] Office of Urban Management (2007) Review of Recreation Participation and Demand Studies for Trail-based Recreation Activities: Technical Report No 1 to the SEQ Regional Trails Strategy

Work : Life Balance

Increasingly we hear of the difficulties faced in deriving meaningful daily achievement and enjoyment from work, family, friends and self. Failure to balance these four quadrants of our lives often has a bearing on our capacity to participate in discretionary activities like recreation. Research has repeatedly shown that a lack of time is frequently cited as a barrier to participation in outdoor recreation[11].

Workforce

The outdoor recreation workforce, like other industries will experience ongoing skill shortages. This is due to a variety of factors, including:

- With longevity rates rising, along with a continuing trend to have fewer children and with a booming economy, the demand for labour exceeds supply
- A smaller working age population: 66% of population is aged 15-64 yrs; by 2050 it will decline to 57%.
- It is an employee's market; the skills shortage is a demographic reality and will be with us for a generation or more
- The length of time spent with an employer is in freefall (Av. = 15 years in 1960, 2006 average tenure is 4 years)
- There are more careers on offer; the average school leaver today will have at least 6 distinct careers in their working life
- Generation Y demand work/life balance from the start of their career – they don't feel the need to earn it. (over 40% of Gen Y is employed on a casual basis)[12]

	Baby Boomers Born 1946-1964 Aged 40's & 50's	**Generation X** Born 1965-1979 Late 20's & 30's	**Generation Y** Born 1980-1994 Teens and 20's
Values at work:	Work ethic Industry-focus	Achievement Company-centric	Ownership Individuality
Motivations for work:	Financial security Responsibility	Career progression Opportunity	Job variety Creativity
Influences over career choice:	Parents Authorities	Careers Advisors Experts	Internet Peer Groups
Shapers of career perception & views:	Tradition Reputation	Observation Recommendation	Perception Experience
Key management tools:	Recruiting Supervising	Training Promoting	Innovating Empowering
Key communication tools:	Technical data Evidence	Visual examples Demonstration	Hands-on learning Participation
Typical training style:	Formal Monologue	Programmed Dialogue	Interactive Multi-modal
Typical leadership style:	Control Thinkers	Coordination Doers	Consensus Feelers
Influencers and Values:	Local Long-term needs	Regional Medium-term goals	Global Short-term wants
Management approach	Telling "Yes boss"	Selling "What's in it for me"	Involving "Here's what I think"

[11] SRQ (2008) SEQORDS; Outdoor Industry Foundation (2006) Outdoor Recreation Participation Study

[12] Mark McCrindle (2007) Bridging the Gap: An employers guide to managing and retaining the new generations of apprentices and trainees

PUBLIC PERCEPTION

QORF believes that ultimately it is the outdoor recreation consumer (both active participants and passive observers) along with the predominant views of the community that will determine the shape of outdoor recreation in the future.

Research[13] has shown widespread public recognition of the positive contributions to quality of life resulting from participation in outdoor recreation activities. The public links use of these activities to overall happiness, family unity, health, improved educational opportunities and deterrence of crime and substance abuse.

Static growth or decline in participation in some outdoor recreation activities and the overall frequency of participation clearly put the benefits arising from participation at risk.

One of the major risks to current and future generations enjoying outdoor recreation activities is the encroachment of [urban] development on places. Therefore, one of QORF's cornerstone challenges is to reinforce the fact that outdoor recreation is a legitimate land use[14] along with agriculture, nature conservation, roads and residential development. This does **not** mean that outdoor recreation in general is more important than any other land use - just that it does deserve serious consideration in land use decision making.

As has been noted earlier, a decision to allocate an area to one or more outdoor recreation activities may as a consequence exclude all, or some, other uses of that area. Conversely, a decision to allocate an area to a particular land use (eg. nature conservation) is often explicitly or implicitly a decision to exclude one or more outdoor recreation activities.

Public opinion is shaped and influenced by what they see and hear as much as by what they experience first-hand. In fact, with a significant proportion of the community not having their own encounters with the outdoors recreation activities, it is reasonable to expect that they form their opinions and beliefs on what they consume in the media.

QORF has had an increasingly focussed attention on conveying messages via mass media by discussing issues that have some level of interest / impact on the community with media outlets. This will continue.

QORF's role is to engage with the public via various outlets to create a positive attitude toward the industry and supportive behaviour for its continued evolution and growth.

13 The Recreation Roundtable (2003) Outdoor Recreation in America 2003: Recreation's Benefits to Society Challenged by Trends

14 Outdoor Recreation in Queensland: The Big Issues http://www.qorf.org.au/01_cms/details.asp?ID=135

SWOT Analysis: QORF

QORF Internal Environment	
(Stick to and build on) **Strengths**	(Reduce) **Weaknesses**
▪ Recognised as the peak body by government ▪ Good representative cross section of market subsets support QORF through membership ▪ Management committee / board has extensive and broad areas of knowledge and expertise and active in supporting QORF's objectives ▪ High level of knowledge and experience of the Executive Officer and staff ▪ Strategic level communication with government agencies and various key government personnel ▪ Successful tendering and completion of projects ▪ Development and provision of useful industry information and advice ▪ Informative industry newsletter which receives positive feedback ▪ Frequent communication with membership and the outdoor recreation community ▪ Website is accessed extensively and which receives positive feedback ▪ Capacity to facilitate successful industry workshops and conferences ▪ Effectively represents the industry on an ongoing basis on a number of relevant industry and government Committees ▪ Successful working relationships and partnerships with other organisations such as RTQ ▪ Successful annual Awards event receives positive feedback from OR community	▪ QORF could be seen as primarily Brisbane focussed and providing services mainly to SE Queensland. ▪ Human and economic resources and time prevent QORF from servicing the needs of customers in regional areas ▪ Current staffing levels restrict the level of service offered to members and broader industry ▪ Hard to find staff with appropriate skills and knowledge of the industry ▪ Funding restricts the level of products and services that can be delivered ▪ The majority of government officers do not understand outdoor recreation, its size, the issues, complexity etc ▪ Not all activity specific outdoor activity peak bodies are members (bushwalkers, BMX, Sunfish, etc) ▪ Membership base alone is not enough to sustain the organisation ▪ Only moderate proportion of commercial operators and individuals are members, compared with the potential membership ▪ Inadequate data on OR participation, trends and economic contribution inhibits growth of the industry ▪ Outdoor recreation as an industry is an immature industry, and not recognised economically as a valuable contributor to the economy

Threat Matrix

The key threats for QORF from the external environment are included below. QORF should focus its attention on the threats that appear in the *High Probability* and *High Potential Severity* quadrant, and develop strategies to address or overcome these threats.

Potential Severity	Probability of Occurrence: Low	Probability of Occurrence: High
High	• QORF misses out on valuable and profitable consultancies due to new competitors entering the marketplace • Change in government causes QORF funding to be drastically reduced	• Government agencies unaware of, and do not endorse **national standards and initiatives**, impeding QORF's goal for regulation, and creating likelihood for more accidents • Increase in **fuel costs** causes people to recreate closer to home, causing overcrowding and overuse, particularly in SEQ • **Inadequate planning** for future needs results in limited access and/or limited opportunities • **Population growth** causes increased competition for settings • **Skills shortage** makes it difficult for organisations to locate and retain current staff
Low	• QORF loses market share and membership to competitors such as other professional associations • Irresponsible participation by specific activity groups antagonises the community against outdoor recreation in general • ACA does not renew MOU with QORF and competes with QORF on products and services including membership	• Declining level of support from volunteers adds additional costs for QORF to run outdoor events • Local government amalgamations inhibit outdoor recreation planning and initiatives at a local level • QORF member organisation causes an injury or death to a client, resulting in bad publicity for organisation, QORF and industry in general

Opportunity Matrix

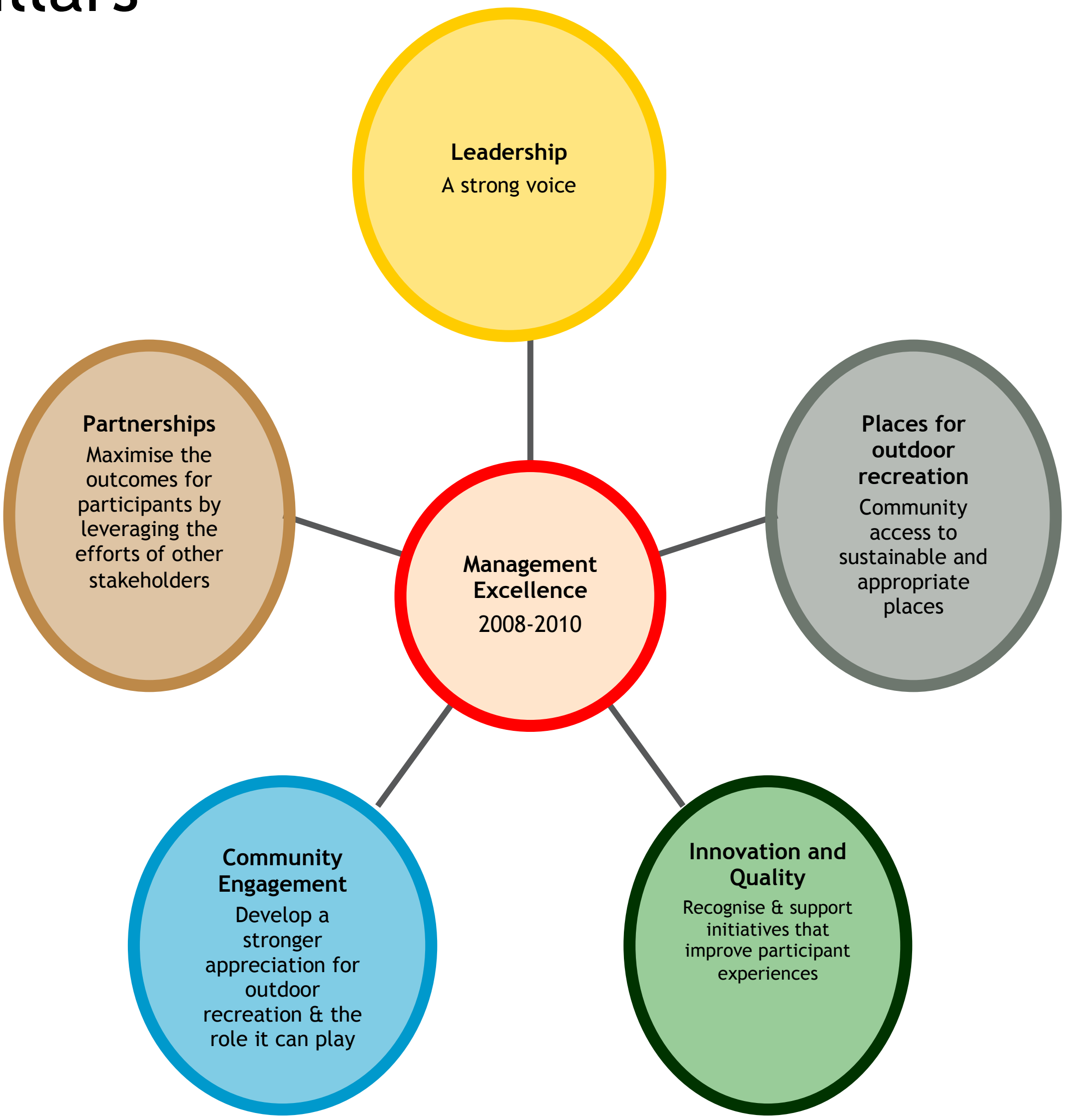
The key potential opportunities for QORF are identified in the matrix below. QORF should investigate the opportunities that appear in the *High Probability of Success* and *High Potential Attractiveness* quadrant. It is suggested that an Action Plan be developed to assist QORF in working towards capitalising on these potential opportunities.

Potential Attractiveness / **Probability of Success**	**Low**	**High**
High	• Opportunity to compete with other organisations for projects, and provide additional income for QORF • 'fee for service' products and services developed to generate income from QORF non-members • QORF receives substantial additional income through advertising opportunities such as the website, wall planner etc, with increased advertising charges justified by an increase in visitation on website and growing database • Finalise implementation of national initiatives such as AAS, QORF to be awarded key consulting role • QORF receives substantial income from corporate sponsors with capacity to offer generous income to fund QORF • QORF increases membership across subsets to generate substantial additional income	• SEQ Outdoor Recreation Strategy causes issues to gain a higher profile within State Government, placing outdoor recreation on the political radar, providing an opportunity to develop a **Qld Strategy** • Government attitude towards QORF and recognition of QORF's capacity to deliver quality results provides an opportunity for QORF to seek **additional funding and sponsorship** • Growth and support for internet by users presents an opportunity for QORF to capture additional markets with its successful **website** • Trend for activities that are **easy to learn and access** and can be **'done in a day'** provides insight into programming for future outdoor events • QORF could acquire additional funding through programs that adequately address the **Obesity Issue** • Increase profile of **Awards Event** with endorsement from Premier or Minister • QORF's knowledge of the outdoor recreation industry and track record with managing projects creates an opportunity for additional **consultancy work**
Low	• QORF runs an Outdoor Event to generate additional income	• QORF tenders for conferences to be run in Queensland

Summary of major opportunities for QORF and/or the outdoor recreation industry

- *Living the Queensland Lifestyle* Election Commitments provide an indication that outdoor recreation activities are on the Government's radar as an area requiring attention
- A new Minister and a change in priorities of the Department of Local Government, Sport and Recreation to take on lead agency role for outdoor recreation
- The review of the Sport and Recreation Development Program by the Department of Local Government, Sport and Recreation (and possible flow-on to other programs such as Minor Facilities, Major Facilities, Club Development, Local Sport and Recreation Program
- The establishment of a dedicated Outdoor Recreation Team within the Department of Local Government, Sport and Recreation
- The potential development of Recreation Activity Standards (with links to NOLRS and accreditation)
- The Outdoor Recreation Training Package review with identification of Skill Sets (and therefore greater links to NOLRS)
- The concerns regarding the quality of outcomes of training, the establishment of the Skills Alliance and the new AQTF standards
- The need to facilitate access to more areas for outdoor recreation activities and the need to build the capacity of the industry to input into both the planning for and management of areas for those activities
- The release of the *SEQ Outdoor Recreation Strategy* and the *Recreation Tourism Strategy* in 2008, and QORF's role in implementing any of the actions and in assisting the broader industry to do so
- The development of Regional Plans in other areas of the State, and the role that QORF and the industry plays in providing input
- The outcomes of the 2006 QORF survey, specifically:
    - the 58% of **non members** who responded
    - specific areas identified where **knowledge is lacking (**business development, marketing, outdoor skills, legal/legislation, industrial relations) and the potential to facilitate the development of products and services to meet this need
    - support for the implementation of **accreditation** and promotion of its benefits
    - potential to **brokerage** training, consultants and services.

Core Pillars



The core pillars define the way that QORF applies itself to the business of developing the outdoor recreation industry. They define the key areas in which QORF is seeking to make an impact and the objective of that impact. QORF may place a different emphasis in each key area and play a different role to achieve the overall desired outcome.

Outcomes and Initiatives

KEY RESULT AREA 1: LEADERSHIP				
Objective		**A strong voice for the outdoor recreation industry**		
Key Outcomes		**Deliverables**	**Responsibility**	**Timeline**
1.1 Strategic Direction: Clear statement of where the industry seeks to head (& QORF's role in shaping that future), based on identified trends and issues	1.1.1	Continue **biennial survey** to gauge industry trends and issues, using a set of core questions and additional sets as required	QORF and the outdoor recreation industry	2008, 2010
	1.1.2	Develop and promote a suite of easily explained & understood **policies, position statements and objectives** that highlight achievable industry development milestones for the outdoor recreation industry	QORF and the outdoor recreation industry	2009
1.2 Advocacy/Lobbying: The outdoor recreation industry achieves enhanced recognition & more effectively lobbies state and local governments / elected representatives	1.2.1	Use the 2008 National Outdoor Summit as a model and host an annual **State Outdoor Summit** or similar for leaders in government, industry and the community	QORF	Annually, from 2009
1.3 Governance: QORF governed in an effective manner in accordance with legislative requirements and best practice principles	1.3.1	Conduct **orientation/induction and professional development** for Management Committee members	MC	Annually
	1.3.2	Conduct annual formal **organisational performance and Management Committee review** and implement recommendations	MC	Annually
1.4 QORF Corporate Image: QORF's status as an industry peak body is evolved to one that can build higher value relationships	1.4.1	Improve **corporate image/branding** of QORF	QORF staff & MC	Ongoing
	1.4.2	**Promote QORF achievements** to a greater audience	QORF staff & MC	Ongoing
	1.4.3	Represent QORF at **strategic corporate functions**, expos, etc	QORF staff & MC	Ongoing

KEY RESULT AREA 2: PLACES TO RECREATE				
Objective		**Community access to sustainable and appropriate places for outdoor recreation activities**		
Key Outcomes		**Deliverables**	**Responsibility**	**Timeline**
2.1 Access to places: An increase in the quantity and quality of space available for outdoor recreation, thereby enabling greater participation	2.1.1	Develop and implement **model(s) for legal entities** (eg. a trust) which enable QORF to: ♦ advocate for trails (in general or specific trails); ♦ pursue funding for specific areas or trails; ♦ assume management responsibility for an area or trail, in conjunction with local clubs; ♦ act as brokers; and/or ♦ lobby for specific local outcomes associated with defined tenure and/or thematic use	QORF	2008 - 2010
	2.1.2	Prepare a **user-friendly resource** which identifies the range of options available to increase public access to public and private land (trusts, MoUs, etc). Include: ♦ case studies that illustrate how recreation users can take a greater burden of personal responsibility thus encouraging private land holders to open up landholdings ♦ model(s) for private landholders to open up their land to outdoor recreation users ♦ issues and solutions	QORF	2008 – 2010
2.2 Recreation planning and management: Outdoor places are better planned for and are more appropriate to the needs of users	2.2.1	Maintain **active involvement in Committees** to ensure that there is adequate planning for outdoor recreation activities and continued access to current land & water resources	QORF	Ongoing
	2.2.2	Work in conjunction with SRQ to build the capacity of clubs and commercial enterprises to provide **constructive input into planning processes**	QORF, SRQ	2008 - 2010
	2.2.3	Work in conjunction with SRQ and local governments to build the capacity of outdoor recreation clubs and groups of individuals to take the responsibility for the **long term management of facilities & areas of public land** (under a lease, Permit to Occupy or other agreement)	QORF, SRQ, LG	2009 - 2010

KEY RESULT AREA 2: PLACES TO RECREATE				
Objective		**Community access to sustainable and appropriate places for outdoor recreation activities**		
Key Outcomes		**Deliverables**	**Responsibility**	**Timeline**
2.3 User education: A community that better appreciates management practices associated with their participation and plays an active role in sustainability	2.3.1	Enhance the capacity within the industry to better **educate current and prospective participants** about their role in sustainable recreation by developing partnerships with organisations able to educate users (eg. Leave No Trace, Great SE, Weekender, equipment retailers)	QORF & partners	Ongoing

KEY RESULT AREA 3: PARTNERSHIPS				
Objective		**Maximise the outcomes for participants by leveraging the efforts of all outdoor recreation stakeholders**		
Key Outcomes		**Deliverables**	**Responsibility**	**Timeline**
3.1 Relationship building (non Government): QORF has defined relationships with key organisations that will enable the outdoor recreation industry to flourish	3.1.1	**Establish formal relationships** (partnerships, networks, industry placement, mentoring, membership, MoU), levering off other organisations and using models appropriate to specific purposes	QORF	2008 - 2010
	3.1.2	**Increase interaction with member organisations** at the grass roots level to inform them about QORF	MC, QORF, and its members	Ongoing
	3.1.3	Provide **forums and networks** for industry to learn about new developments, exchange ideas and provide their views. Options include: ◆ Member's network ◆ State conference ◆ Workshops ◆ Interaction in the workplace / at meetings held by members ◆ Breakfasts, Ministerial luncheons	QORF and industry experts	Ongoing
	3.1.4	**Create opportunities to engage meaningfully** with retailers and other industry stakeholders who have a vested interest	QORF	Ongoing
3.2 Local & State Government Engagement QORF has defined relationships with State and local government to improve communication and collaboration	3.2.1	Establish formal relationships to improve **engagement with local governments and LGAQ** (eg. formal networks, membership, MoU, quarterly meeting schedule, attendance at LG Sport & Rec Forum & LGAQ conference)	QORF LGAQ	2009
	3.2.2	Establish formal relationships to improve **engagement with State Government agencies** (eg. formal networks, MoU, meeting schedule with senior staff, newsletter articles, attendance at workshops & conferences)	QORF, QG agencies and Departments	2008
3.3 National and interstate partnerships: QORF has defined relationships with key stakeholders	3.3.1	Play an active role in driving **national initiatives** through OCA	QORF, OCA Other state divisions	Ongoing
3.4 Specific Event or Project Partnerships QORF has defined project/event partners	3.4.1	Pilot **specific events** in partnership with members who already conduct activities	QORF	Ongoing
	3.4.2	Manage or participate in **significant projects** (which are consistent with QORF's objectives) in conjunction with Government or non-Govt. partners	QORF	Ongoing

KEY RESULT AREA 3: PARTNERSHIPS				
Objective		**Maximise the outcomes for participants by leveraging the efforts of all outdoor recreation stakeholders**		
Key Outcomes		**Deliverables**	**Responsibility**	**Timeline**
	3.4.3	Develop and implement a multi-year **research schedule** which develops a picture of issues and trends within the industry that complements research undertaken by State Govt and NGOs	QORF in conjunction with PLA, DLGSR, RTQ, universities	Ongoing

KEY RESULT AREA 4: COMMUNITY ENGAGEMENT				
Objective		**Develop a stronger appreciation for outdoor recreation and the role it can play**		
Key Outcomes		**Deliverables**	**Responsibility**	**Timeline**
4.1 Community awareness: The Queensland community has a stronger appreciation for outdoor recreation and the role it can play in an active and healthy lifestyle	4.1.1	Create and implement at least **one big ticket, mass-market outdoor participation event** to demonstrate the role outdoor recreation activities can play in maintaining a physically active lifestyle and contribute to combating obesity	QORF	2009, then ongoing
	4.1.2	Target **niche markets** (eg. services to Over 50's, disabled) in conjunction with outdoor recreation activity operators and ensure training is available to deliver to these niche markets	QORF, RTQ	Programs from 2009
	4.1.3	Provide input into **State Physical Activity Strategy** and its implementation	SRQ, QORF	Ongoing
4.2 Community support: Improved support for outdoor recreation in the community	4.2.1	Shift the focus from marketing QORF to one of **promoting outdoor recreation activities** - directly and indirectly (through partnerships) and build services and convey messages to industry that are related to industry development	QORF	Ongoing
	4.2.2	Promote **QORF membership and its benefits** to identified niche markets to enable QORF to provide services to, and be representative of, the breadth of the industry	QORF	Ongoing
	4.2.3	Create a **network of QORF Ambassadors** to represent the industry and QORF, particularly in regional areas	QORF and its membership	2008 -2010
4.3 Capacity Building: Enhanced capacity of outdoor recreation industry	4.3.1	Provide **assistance to non government-funded member organisations** to build their capacity to deliver services and/or safe, quality programs	QORF	Ongoing
	4.3.2	Facilitate the **delivery of appropriate training** to industry (source providers, inform industry, etc)	QORF, RTQ, SRQ	Ongoing
	4.3.3	Promote the **value and benefits of outdoor recreation activities** with a focus on developing a preparedness to pay for infrastructure and services	QORF and members	Focus from 2009

KEY RESULT AREA 5: INNOVATION AND QUALITY				
Objective		**Recognise and support initiatives that improve outdoor recreation provision and participant experiences**		
Key Outcomes		**Deliverables**	**Responsibility**	**Timeline**
5.1 Industry profile as a career: Outdoor recreation is an attractive industry that recruits and retains workers	5.1.1	Maintain information (eg. **career case studies)** that describe occupations, the knowledge, skills and experience required and the training/professional development that individuals have undertaken	QORF RTQ	Ongoing
	5.1.2	Maintain distribution of **HR/IR related information** & promote importance of HR/IR to industry attractiveness & retention of workers	QORF	Ongoing
5.2 Workforce development: A skills and learning pathway that provides entry to the industry and ongoing workforce development	5.2.1	Support the development & implementation of initiatives within a **Skills Formation Strategy** to meet current & future skills shortages within the outdoor recreation industry	RTQ QORF	2008 -2009
	5.2.2	Promote the value of traineeships & the **cadetship model** and investigate the extension of the Diploma initiative to more participants	RTQ QORF	2008
	5.2.3	Create opportunities for **teacher / trainer professional development**	QORF, SRQ, DETA, RTQ	Ongoing
	5.2.4	Maintain **access to information about workforce development and training opportunities** relevant to the industry	QORF, RTQ	Ongoing
	5.2.5	Work in conjunction with RTQ, through its Special Initiative project, to develop suitable tools and processes to improve access to cost-effective **Skills Recognition**	QORF, RTQ	2008
	5.2.6	Assist RTQ in advocating for and implementing a **brokerage model for training and/or a preferred supplier model**	QORF, RTQ	Ongoing
5.3 Quality businesses &leaders: Increased awareness & uptake of the National Outdoor Leader Registration Scheme (NOLRS) and relevant accreditation programs	5.3.1	Provide support for organisations (not eligible under SRDP, CDP) for **training/RPL of volunteer leaders** to enable registration within NOLRS	QORF	Ongoing
	5.3.2	Promote the concept of Partnered Assessment Providers and map university, "in house" and private courses	OCA, QORF	2008
	5.3.3	Work in conjunction with SRQ to facilitate the development and implementation of **Adventure Activity Standards**	QORF, SRQ	2008
	5.3.4	Target key enterprises and assist them through the **accreditation process**	QORF	2008 - 2010
	5.3.5	Support **marketing of/by those who meet agreed industry standards**	QORF	Ongoing
	5.3.6	Promote to land managers and other consumers the **benefits of accreditation, AAS and NOLRS** in achieving safer, more sustainable outdoor activities	QORF, ACA, OCA	Ongoing

KEY RESULT AREA 5: INNOVATION AND QUALITY				
Objective		**Recognise and support initiatives that improve outdoor recreation provision and participant experiences**		
Key Outcomes		**Deliverables**	**Responsibility**	**Timeline**
5.4 Industry recognition: Recognise the best professionals and practices in outdoor recreation	5.4.1	Conduct the **annual QORF Awards** and focus on accompanying branding and recognition packages	QORF	Annually

Key Result Area 6: Management Excellence				
Objective		**Streamlined and responsive planning and management systems.**		
Key Outcomes		**Deliverables**	**Responsibility**	**Timeline**
6.1 Client Service: Responsive and customer-focussed service to clients and members	6.1.1	Clearly define what **QORF clients can expect to get from their involvement in QORF**, and align to what staff are expected to achieve	QORF staff	Ongoing
	6.1.2	**Monitor organisational performance** against key business criteria in monthly 'dashboard'	QORF staff & MC	Ongoing
6.2 Communication: Improved open channel communications with industry	6.2.1	Implement the *QORF Integrated Marketing and Communications Plan (2008-2010)*	QORF staff	2008 - 2010
	6.2.2	Maintain effective IT tools, equipment and information and records management systems	QORF staff	Ongoing
	6.2.3	Develop and implement a process to allow **better sharing of relevant industry information** internally and externally	QORF and industry	2008

Appendix 1:Relationship between QORF and OQ

The relationship between QORF and OQ is best represented in Tables 4 and 5 below. However, in summary:

- QORF identifies an industry need; OQ develops the tool to address that need
- QORF is the employer; OQ is the Contractor or employee
- OQ is involved in activities which are best undertaken by a Company or Trust and/or are outside the realm of an incorporated association.

Table 4: QORF and OQ Products and Services

QORF	OUTDOORS QUEENSLAND
Establishing Quality Assurance (through registration, accreditation, benchmarking etc)	Products and services to assist people or organisations to reach the “standard”
Frameworks	Deploy / Operationalise
One size fits all	Customised
Self serve	Personal Service
Information – a one-stop-shop Where do I …? How do I …?	Brokerage / Booking Fees for specific assistance or service
Government $$ -→ Research and Development →	Private Customers – building knowledge – (to feedback into QORF Research and Development)

Comparison of QORF and Outdoors Queensland:

Table 5: QORF and OQ Objectives and Governance

	QORF	OUTDOORS QUEENSLAND
History	QORF was formed in 1996 as a not-for-profit association consisting of a coalition of outdoor recreation groups to represent and advocate on behalf of the industry.	Outdoors Queensland was established in 2006
Purpose	Peak industry body and/or professional association representing outdoor recreation in Queensland	To provide products and services directly to business and government engaged in the outdoor recreation industry; and to provide some outdoor recreation opportunities to the community (or encourage participation in OR)
Organisation Type	An incorporated not-for-profit industry association	A private (essentially non trading) company which administers a Unit Trust which lists QORF as the sole unit holder and beneficiary of any profits
Tax Status	QORF is exempt from company tax on profits and receives an FBT rebate of [48.5%]	Any income transferred to the Trust is not taxable, as QORF (the beneficiary) is tax exempt
Vision	The Queensland Outdoor Recreation Federation affirms the value and encourages the opportunity for all people to recreate outdoors	Outdoors Queensland provides high quality products and services to stakeholders in the outdoor community in Queensland, nationally and internationally Financially support the operations of the peak industry body, the Queensland Outdoor Recreation Federation
Membership	Open membership comprising Ordinary and Associate Membership categories. Ordinary = State Associations/State coverage. Associate = all others	Membership limited in number to comprises the current QORF Management Committee
Pricing	Cost and pricing are minimised (cost recovery + minimal margin)	Product and service customisation allows for a premium pricing approach
Advocacy	QORF does not lobby for any one activity or interest group, but ensures that the interests of **all** are represented	Nil
Relationships: Government	QORF funded by SRR to achieve outcomes in the areas of advocacy/representation, education/training to industry and service delivery to members	OQ views government agencies as potential customers
Relationships: Customers	QORF has an almost open door policy when it comes to providing service to outdoor recreation stakeholders	OQ can forge a higher value relationship with particular client organisations who are prepared to pay for a higher quality and customised service

Appendix 2 :

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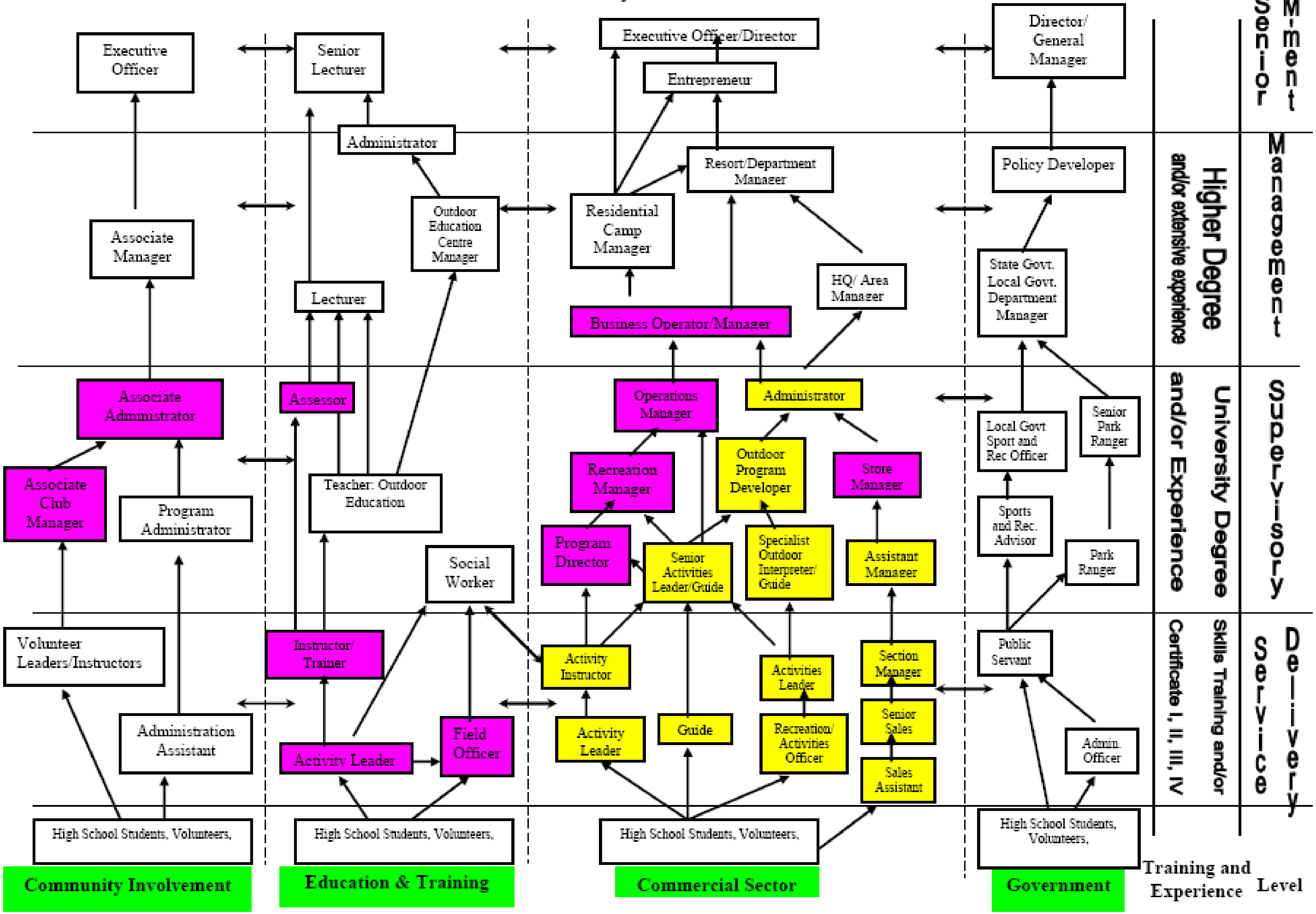
Career Pathways Outdoor Recreation



Appendix 3: QORF Representation

QORF fulfils one of its core responsibilities by representing the outdoor recreation industry in a range of forums including:

Access

- Outdoor Recreation and Regional Parks Working Group
- Regional Landscape and Open Space Advisory Committee
- Mountain Bike Forum / Mountain Bike Forum Steering Committee
- SEQ Trail Bike Management Forum / Steering Committee
- Rural Futures Forum

Training

- Recreation Training Queensland Management Committee
- Sport and Recreation Skills Alliance
- Sport and Recreation Industry Advisory Committee, Service Skills Australia (representing the Outdoor Council of Australia)
- National Industry Reference Group (for review of Sport and Recreation Training Packages, representing the Outdoor Council of Australia)

Other

- SEQ Local Government Sport and Recreation Professionals Forum
- BCC Sport, Activity and Health Advisory Committee
- Community and Industry Advisory Group, Moreton Bay & Catchments
- Outdoor Council of Australia Board
- NOLRS Sub-Committee

Appendix 4: Outdoor Recreation Participation

PARTICIPATION GROWTH

Key statistics from the 2007 SEQ Outdoor Recreation Demand Study (SEQORDS)[15] report indicate that picnicking, water activities, walking / nature study and camping are the most popular outdoor recreation activities.

Incidence and frequency of participation over the past 12 months, and the recreational setting in which this occurred

Activities	Percentage who participated in previous 12 months (2001 figures in brackets)	Actual population (based on ABS 2005 data)	Frequency (Median)	Activity Events per Year (Population multiplied by median)	Recreational Setting [a] (2001 figures in brackets)		
					Somewhat natural %	Very natural %	Totally natural %
Picnicking	58% (67%)	1278634	3	3835902	66(59)%	26(33)%	8(8)%
Walking or Nature Study*	**35% (49%)**	771448	5	3857240	47(49)%	36(34)%	15(17)%
Camping	30% (33%)	666400	2	1332799	33(29)%	45(51)%	20(20)%
Bicycle Riding	29% (26%)	610593	12	7327114	76(83)%	18(15)%	4(2)%
Horse Riding*	7% (7%)	160855	3	482565	47(27)%	44(46)%	**8(27)%**
Water Activities*	54% (56%)	1188358	8	9506865	71(62)%	**21(31)%**	7(7)%
Driving 2WD Vehicles *	**15% (24%)**	331558	4	1326234	43(35)%	**45(57)%**	14(8)%
Driving 4WD Vehicles	23% (23%)	505545	3	1516634	25(19)%	53(63)%	21(18)%
Driving Other Vehicles *	**11% (7%)**	233076	5	1165379	33(39)%	43(52)%	**24(9)%**
Riding on Motorised Watercraft *	**21% (27%)**	462869	4	1851475	52(40)%	34(46)%	14(14)%
Riding on Non-Motorised Watercraft *	**17% (19%)**	377517	2	755034	50(39)%	**36(47)%**	14(14)%
Abseiling or Rockclimbing	6% (6%)	132952	2	265903	45(52)%	32(24)%	23(24)%

[a] This is expressed as a percentage of the amount of time spent in all settings. The percentages provided for each of the three recreational settings add up to 100%

[15] Sport and Recreation Qld 2008

A slightly different picture is painted when frequency (ie. the median number of events that people participate in – eg. 4 picnics or 11 bicycle rides annually) is factored in to the equation. For example, this sees camping shuffled down the 'popularity' order and water activities and bicycle riding race toward the top as generally people go surfing and bike riding more often than they go camping.

Endnotes

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[i] Outdoor recreation services provided by state and/or local government agencies and/or the private sector and/or volunteer-based non-government organisations include:

- Planning (eg. local government recreation plans for specific areas; the recreation components of open space plans; management plans - which incorporate recreation sub-plans - for National Parks, Marine Parks, State Forests and other public land tenures; site management plans for private lands; etc.);
- Basic custodial land management (eg. wildfire suppression, erosion control, weed control, feral animal control and fencing);
- Resource management (eg. prescribed burning; management of noise, water or air pollution; landscaping; protection of key cultural heritage sites; management of water supply catchments; rehabilitation of damaged areas; maintenance of biological diversity; protection of rare and threatened species; etc);
- Risk management (eg. relocation or destruction of dangerous animals; education about dangerous weather or sea conditions; temporary closure of dangerous areas; warning signs; removal of damaged trees; etc)
- Enforcement (eg. patrols by enforcement staff, on-the-spot fines, confiscation of equipment, directions to leave an area or to stop doing a particular activity, etc.);
- Education and interpretation (eg. direction and educational signs, guided walks, guided drives, spotlighting, campfire talks, posters, information sheets, brochures, books, videos, maps, etc.);
- Outdoor recreation activity programs (eg. organised outdoor recreational walking, skills instruction, training for participants and officials, etc.);
- Provision of supervision, first aid, search and rescue (eg. SES, Surf Life Saving, Coast Guard, pool supervision, etc.);
- Organising external suppliers (eg. food and beverage suppliers, cleaners, entertainers, first aid, etc.);
- Marketing (eg. promotional events and advertising signs, brochures, books, videos, maps, etc.); and
- Financial and other forms of support to non-government outdoor recreation interest groups.

ii Groups Call for boost to nature-based tourism. 16.07.2007 http://www.smh.com.au/news/news/australia-falling-behind-on-naturebased-tourism/2007/07/16/1184559677362.html
TTF Australia (Tourism and Transport Forum) managing director Christopher Brown today said further investment in this growing tourism market could provide a new source of revenue for park conservation and research activities.

"We need to forge a new partnership between the tourism industry, tourism authorities, park managers and the conservation sector," Mr Brown said.

iii Individuals in their late 20s into 30s who think like a teenager. They are without serious commitments - no mortgage, no kids and possibly live with their parents. Given they are free from children, financial commitment and possibly no long-term partnership, they have a relative abundance of discretionary time and money.

iv Dept. Tourism, Industry and Resources. 2007. Changing Consumer Behaviour: Impact on the Australian Domestic Tourism Market.
Increasing competition for share of wallet and time: The TRC report found that 'the increasing competition for share of wallet and of time, the industry may need to accept that domestic travel is unlikely to return to historically high levels.' However the report also stated that 'changes in both communications and in product can increase share.'
The research identified that 'spending patterns and the benefits derived from it vary across the generations, although there are some constants: technology, cars and furniture.'

The Domesticate™ report stated:
'Generally those who are younger or more under pressure spend more on compensatory items to make them feel better about life. These tend to deliver instant gratification in a way that travel cannot.'

Latest data from Tourism Research Australia National Visitor Survey (NVS) suggest that:
- In contrast to travel, tangible products such as home entertainment systems offer immediate gratification

- More opportunities to repeat the experience. This is especially important if you feel under pressure or stressed. With home entertainment systems, the opportunities for "compensation" for these stresses are there every day.
- More visible and frequent opportunities for display to those for whom this matters.
- The opportunity to consume the product at your leisure and on your own. "Me time" is very important to people, especially those who are under pressure. Holidays are increasingly about negotiation of your needs with others with whom you go on holiday.'