AUSTRALIAN
CAMPS ASSOCIATION®
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PRICING AND OCCUPANCY

SURVEY REPORT

2022-2023 Financial Year

The Australian Camps Association is the national peak body for camps and associated providers.

The Australian Camps Association (ACA) is the national peak body for camps and associated providers. We develop, support and promote the delivery of camp experiences that provide positive community, social and personal outcomes.

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INTRODUCTION

The Pricing and Occupancy Survey has been conducted by the Australian Camps Association (ACA) since 2006. It is conducted every second year, and this report will reflect the financial year of July 2022 through to June 2023.

The Survey informs member practice by benchmarking prices, capacities and occupancy rates. It also identifies any relevant industry trends and flags areas where members may benefit from further professional development and support via the ACA and other avenues.

The data and information derived from the Survey is made available to all ACA members and to government bodies making investment and policy decisions that impact on the camping sector.

This Survey covered the 2022 – 2023 financial year and was conducted from July 2023 to October 2023.

As in previous Surveys, questions were grouped in sections:

Section 1	General Business Information
Section 2	Capacity and Occupancy Rates
Section 3	Marketing and Sales
Section 4	Rates, Activities and Charges
Section 5	Employment
Section 6	Financial Data

Additional supporting information is provided in appendices attached, including a quick reference guide to the Survey Questions.

All individual responses remain confidential. This Report is only published in aggregate form expressing percentages, totals, averages, etc. Individual site information is not published and will not be released to any member, external body, or organisation.

Before we conduct this survey in the future, I believe it is an opportune time to review all aspects of this survey to ensure it meets all stakeholders needs and to explore how we can collect a more extensive form of data without causing an inconvenience to members. I will also be canvassing all members for your feedback during this review process.

This Report may be used in future presentations made by the Australian Camps Association to members, government bodies and funding agencies.

The Australian Camps Association sincerely thanks those members who contributed to this Report.

Any increases or decreases noted are in comparison to the last report (2018/19).

Regards,

Peter McDougall
Chief Executive Officer
The Australian Camps Association
March 2024

DEFINITIONS OF TERMS USED IN THIS SURVEY

Activity Capacity	The number of guests that you can accommodate, or provide a service for, on any given day (i.e. not overnight).
Activity Day	The number of guests on site on any given day (i.e. not overnight), usually associated with activity providers and/or day programs.
Quality Tourism (QT)	Formerly known as the Australian Tourism Accreditation Program (ATAP).
Bed Capacity	The number of available paying beds on site.
Bed Night	The number of beds occupied by paying guests on any given night.
Booking	Any individual booking agreement or contract paid for and delivered.
Client	The person, group or organisation which books or pays for your facilities or services.
FTE	Full Time Equivalent, the total number of staff employed expressed in full time loads – e.g.: - Two staff each employed on a 0.5 basis (i.e. five days a fortnight) = 1 FTE - One full time staff member, one staff member employed two days a week (2/5 load or 0.4) and three staff members employed four days a week (4/5 load or 0.8) equates to 1 x 1.0 + 1 x 0.4 + 3 x 0.8 (2.4) = 3.8 FTE
Full Program	When all of the program or activities for a booking are conducted by your staff.
Guest	Anyone who visits your site or uses your services as the result of a booking.
Led Activities	Activities that are managed / supervised by your staff.
Led Journey Program	Off site camping managed / supervised by your staff.
NARTA	National Accommodation Recreation and Tourism Accreditation.
Occupancy Rate	The percentage of available paying beds occupied by paying guests in a given reporting period (see examples below).
Shared Program	Your staff and client staff/clients share in the delivery of the program.
Supported Journey Program	Guests are accompanied by one of your staff or are met at least once a day at activity venues or overnight stop points with food or other support.
Retention	Bookings that return to your site year on year.

EXECUTIVE SUMMARY

The Australian Camps Association sent the Pricing and Occupancy Survey via email to 176 member camps and adventure activity providers. The Survey was open from July 2023 to October 2023. There were 44 responses (41 camps and three outdoor activity providers) received; a response rate of 25%, this is an increase of 9% from previous Survey. Of the 44 respondents in this Survey, 19 respondents (43%) also participated in the previous Survey, meaning 57% of respondents to this Survey did not participate in the previous Survey.

It is important to note that when comparing data to previous Surveys, we are not comparing the same respondents. This will impact some of the data where you may notice an increase in particular activities (e.g. Surfing) which is due to an increase of respondents to this Survey in coastal areas (15%) is likely to be the cause of increases in some of the water/ocean-based activities (e.g. Surfing), rather than more businesses offering these activities across the sector.

Some respondents chose not to (or were not able to) answer all or part of some questions, particularly those relating to financial information. This has meant that some question's data sets are incomplete. Where this is the case, we have provided analysis only of those responses that have included complete data for that question.

Below are some general trends that have emerged since the last Survey (2018/19 FY):

- The average number of enquiries received by residential camps in a 12-month period is 357. On average, 9% (approximately 32 enquiries per respondent) of these enquiries are derived from a combination ACA's Booking Enquiry Service and direct enquires via ACA member website listings. (approximately 1,400 enquiries are received by the ACA p.a. and are then distributed to member camps).

- The school market continues to be the primary client type for respondents – government primary and independent secondary ranking as the top two as per the previous Survey.

- The categories of staff wages, unspecified and catering were ranked as the top three operating expense items for the 2022/23 FY.

- The most common activities offered remain low resource-intensive ones, such as campfires, low ropes, orienteering and team building.

SECTION 1

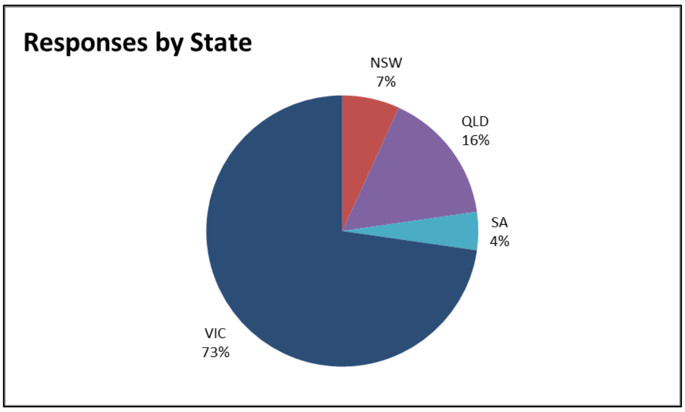
GENERAL BUSINESS INFORMATION

SECTION 1 - GENERAL BUSINESS INFORMATION

Responses to questions 1.1, 1.2, 1.3 are related to specific contact details and are not published.

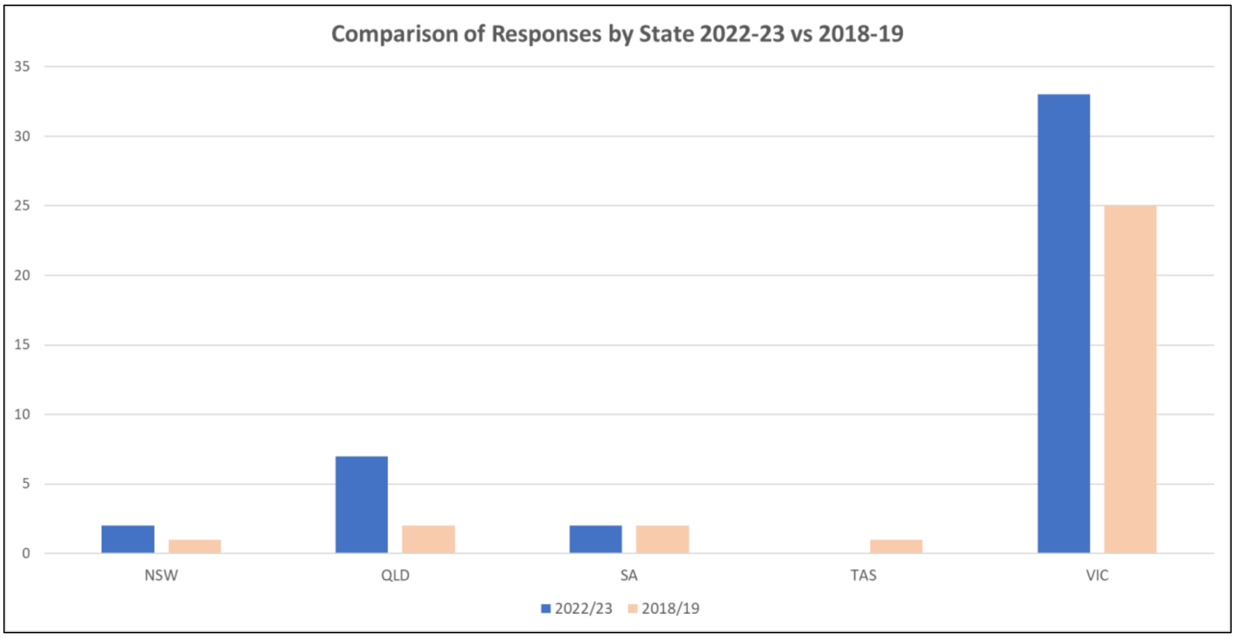
1.4 Business Location

State	Respondents
ACT	0
NSW	3
NT	0*
QLD	7
SA	2
TAS	0*
VIC	32
WA	0
TOTAL	**44**



This response by state remains consistent with previous Surveys. No responses were received from members in WA or ACT.

**At the time of the 2022 – 2023 Survey the Australian Camps Association did not have members located in the Northern Territory or Tasmania.*



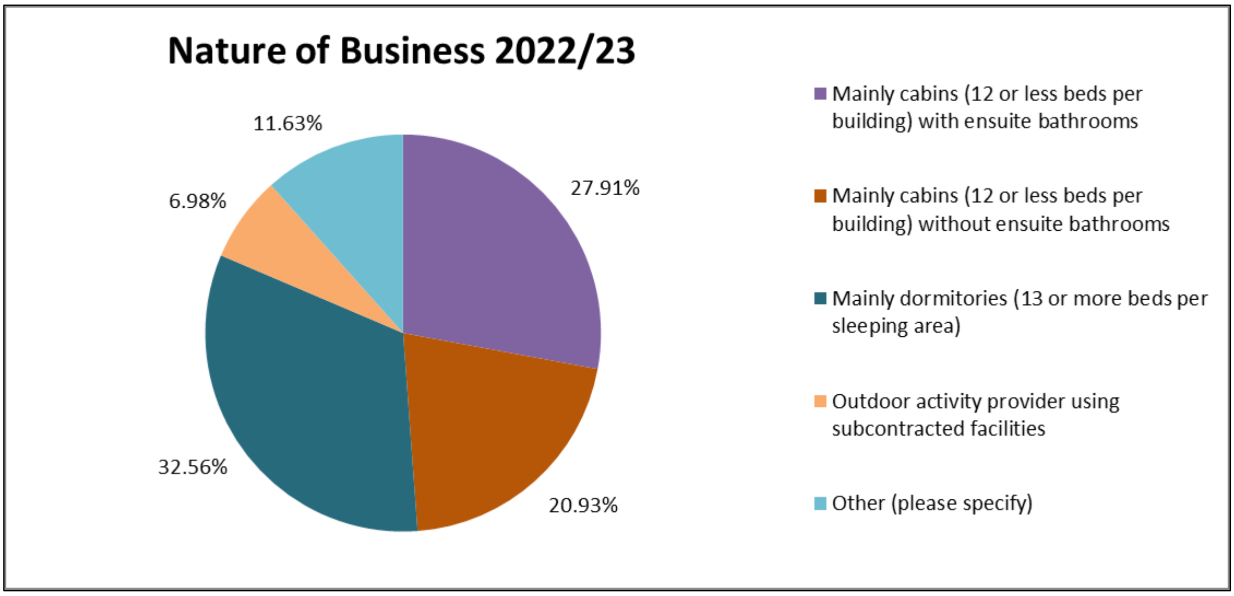
Question 1.5 is related to specific contact details and is not published.

1.6 Nature of the Business

Nature of Business	22-23 Respondents	18-19 Respondents
Tent sites only	0 (0%)	0%
Tent sites with some cabin accommodation	0 (0%)	13%
Mainly cabins (12 or less beds per building) with ensuite bathrooms	12 (28%)	36%
Mainly cabins (12 or less beds per building) without ensuite bathrooms	9 (21%)	16%
Mainly dormitories (13 or more beds per sleeping area)	14 (33%)	32%
Activity centre with no overnight accommodation	0 (0%)	0%
Outdoor activity provider using subcontracted facilities	3 (7%)	3%
Other	5 (12%)	0%
TOTAL	**43**	

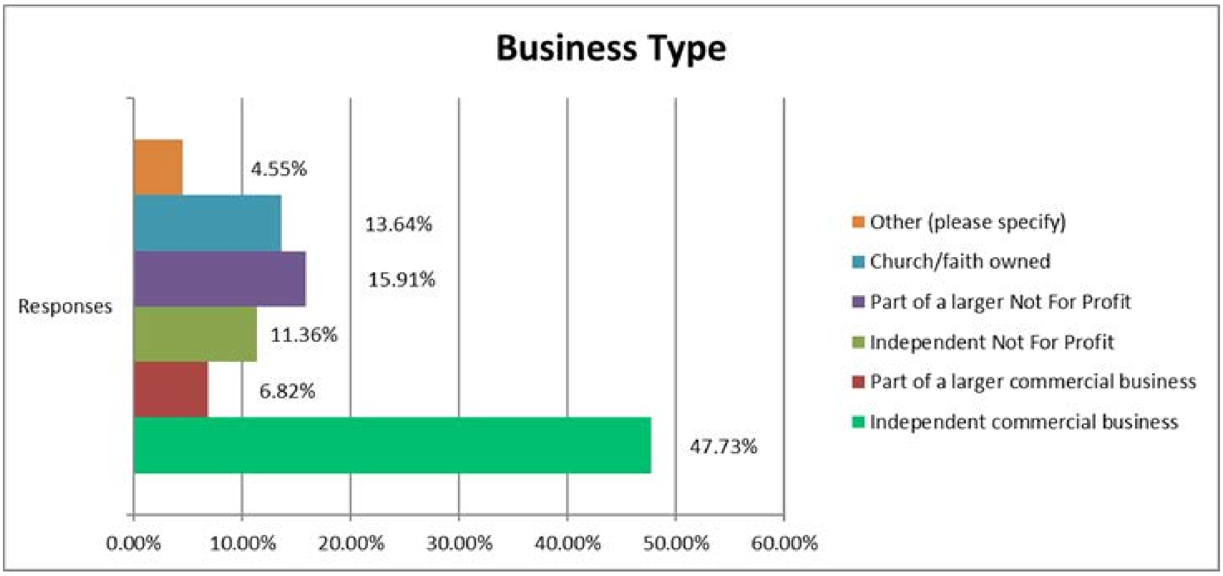
When we compare the data between the 2022-23 and the 2018-19 Surveys:

- 'Tent sites only' and 'other' response options were introduced for this survey (Zero respondents provided tent sites only). Responses to 'Other', forming almost 12% of the responses, were Cottage, Lodge (with either toilet block facilities or ensuites), Activity Centre with overnight accommodation and catering, and Camp Out. This potentially would reduce the response percentage for in other response categories.
- No respondents for 'tent sites with some cabin accommodation', this is a decrease from 13% in the last survey.
- 'Mainly cabins with ensuite bathrooms' saw a decrease from 36% to 28%.
- 'Mainly cabins without ensuite bathrooms' saw an increase 16% to 21%.
- 'Mainly dormitories' is comparative to last survey at 32% to 33%.
- As per the previous survey, zero respondents were Activity Centres offering no accommodation.
- Increase in responses from Outdoor Activity Providers using subcontracted facilities (increase from 3% to 7%).



1.7 Business Type

Business Type	Respondents
Independent commercial operator	21
Part of a larger commercial entity	3
Independent Not-for-Profit (NFP)	5
Part of a larger Not-for-Profit (NFP)	7
Church/Faith owned	6
Other	2
TOTAL	**44**



This Survey Question was expanded to have extra response options of 'Other' and 'part of a larger commercial business'. The previous survey category of 'part of a larger NFP, inc. church owned' was split for the 2022-23 Survey to represent the two categories 'Church/Faith owned' and 'Part of a larger Not-for-Profit'.

Responses received as 'Other' identified their business structure as 'Government'.

1.8, 1.9, 1.10, 1.11 Accreditation and Wider Sector Engagement

The following table lists respondent's affiliations with external organisations or accreditation schemes.

	2022/23		2018/19
Organisation / Scheme	**Number of Respondents**	**% of Respondents**	**% of Respondents**
Quality Tourism Framework (formerly ATAP)	44	77%	84%
QTF – Camps and Adventure Activity Provider Module	34	100%	74%
National Accommodation Recreation and Tourism Accreditation (NARTA) scheme	44	27%	6%
Both QTF and NARTA	44	18%	3%

Of the forty-four respondents to question (1.8 – Is your business accredited with the Quality Tourism Framework?), 34 of them are accredited with a Quality Tourism Framework (QTF), representing 77%. Of those 34 that indicated they are accredited with QTF, 100% have the Camps and Adventure Activity Provider Module.

Of the 44 respondents to question (1.10 – *Is your business accredited with National Accommodation Recreation and Tourism Accreditation (NARTA)?*), 12 respondents (27%) are accredited with NARTA.

Eight of the 44 respondents (18%) are accredited with both QTF and NARTA.

Wider Sector Engagement

Respondents are also Members/Affiliated with the following organisations:

Organisation /Scheme	Respondents 22-23	% of Respondents (22-23)	% of Respondents (18-19)
Christian Venues Association (CVA)	9	21%	9%
Outdoor Council of Australia (OCA)	2	5%	3%
Outdoors NSW and ACT	5	12%	6%
Outdoors VIC	15	35%	32%
Outdoors Queensland	7	16%	3%
Outdoor Education Association (OEA)	1	2%	NPS*
South Australian Tourism Industry Council	1	2%	6%
Victorian Tourism Industry Council	18	42%	22%
Visit NSW	1	2%	NPS*
International Camping Fellowship	5	12%	NPS*
Other	3	7%	NPS*
None of the above	3	7%	NPS*

**NPS = Not in previous survey.*

Options that received no (0) response have been omitted from the Report. The 'organisation/scheme' list for this question was expanded in the 2022-23 survey to better capture wider sector engagement. Organisations represented under 'Other' in this survey, included: AEE Association Experiential Education, Nature-Based Outdoor Network SA (NBONSA) and Parks Victoria LTO.

SECTION 2

CAPACITY AND OCCUPANCY RATES

SECTION 2 – CAPACITY AND OCCUPANCY RATES

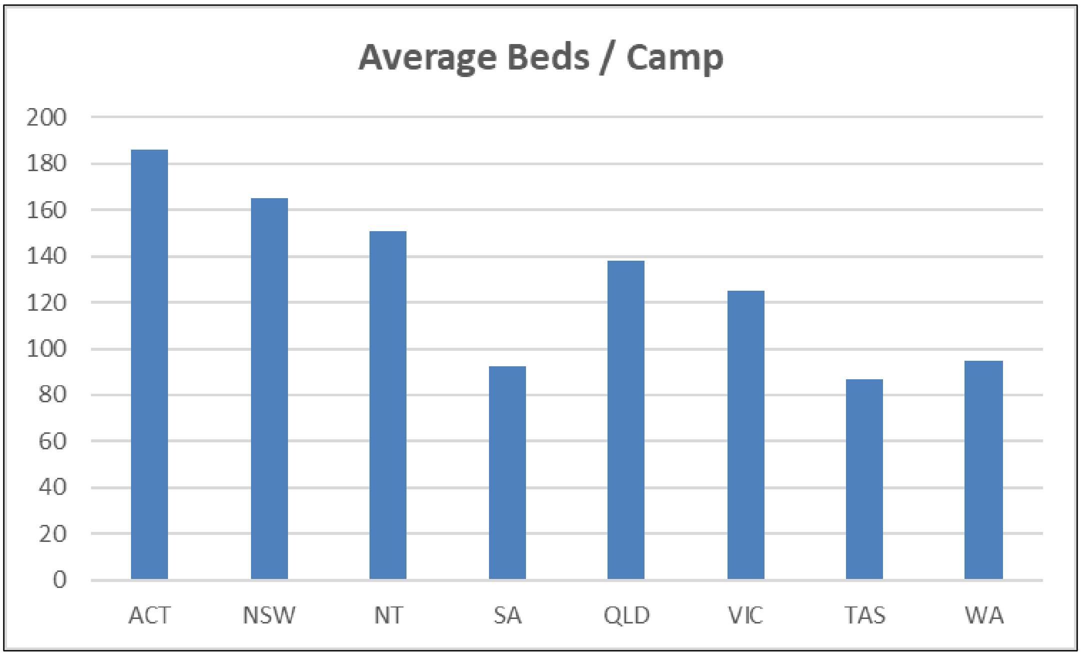
2.1 Overnight Accommodation

All respondents provide overnight accommodation, with two exceptions, both outdoor activity providers.

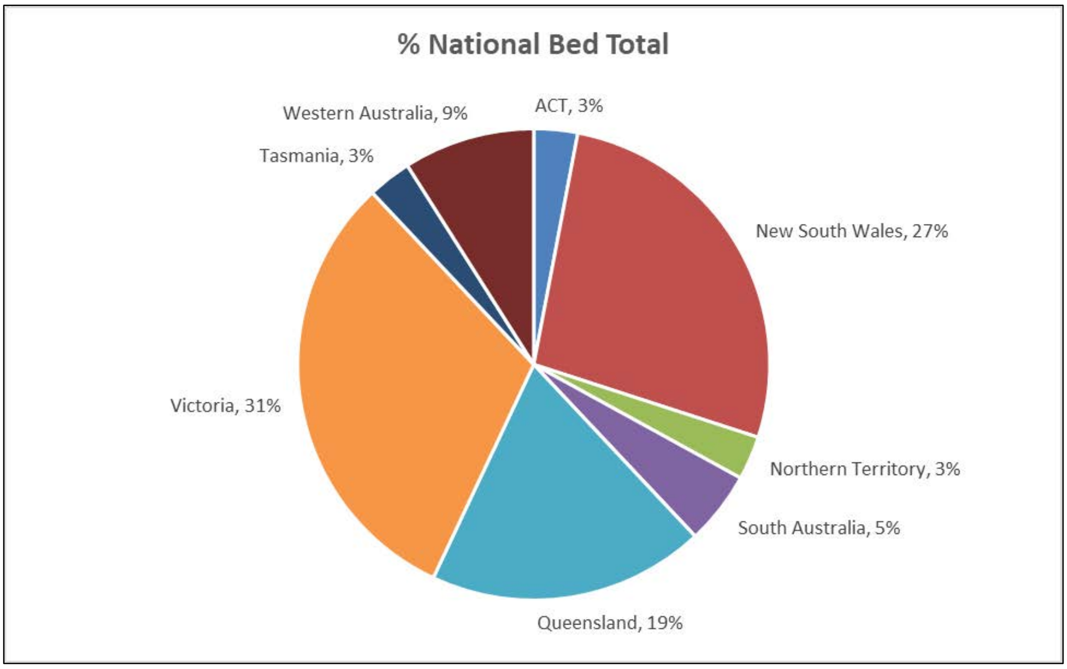
2.2 Bed Capacity

Respondent's bed capacity ranged from 56 to 536, with an average of 181. This average is slightly higher than the previous Survey of 174.

However, using national data, the average bed per camp by state is as follows:



See Appendix 3 for more details.



2.3 Occupancy Rate

Respondent’s occupancy rates ranged from 9% to 75%, with an average of 32%. This average is an increase from previous Survey’s average of 23%.

2.4 Day Usage of Sites

The usage of sites as a single day venue ranged from 0% to 75% with an average of 5%. This data included some outdoor activity providers.

SECTION 3

MARKETING AND SALES

SECTION 3 – MARKETING AND SALES

These questions explored enquiry levels and enquiry source, conversion rates, barriers to booking, client types, retention rates and reasons for cancelling.

There are a number of respondents (16%) who were not able to answer all questions (some may have been unwilling to disclose this information). This may indicate that either, respondents are not capturing this information and that further professional development in Marketing and Sales may be helpful. Capturing this data per site may provide operators with valuable knowledge that may assist their business operations.

3.1 How Many Enquiries did you Receive During the 2022/23 FY?

37 responses (84%).

Responses ranged from 6 to 2422 enquiries received, with an average of 357.

Last Survey's data for comparison: Responses ranged from 12 to 519, with an average of 211.

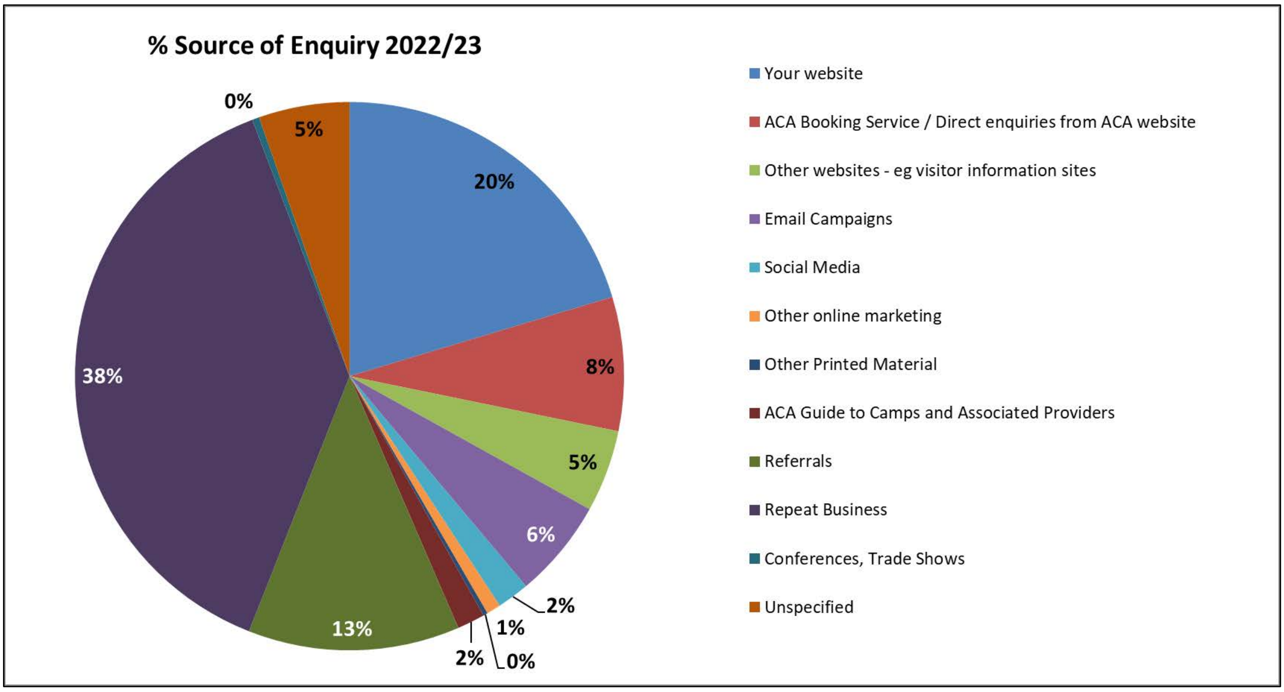
3.2 Enquiry Source

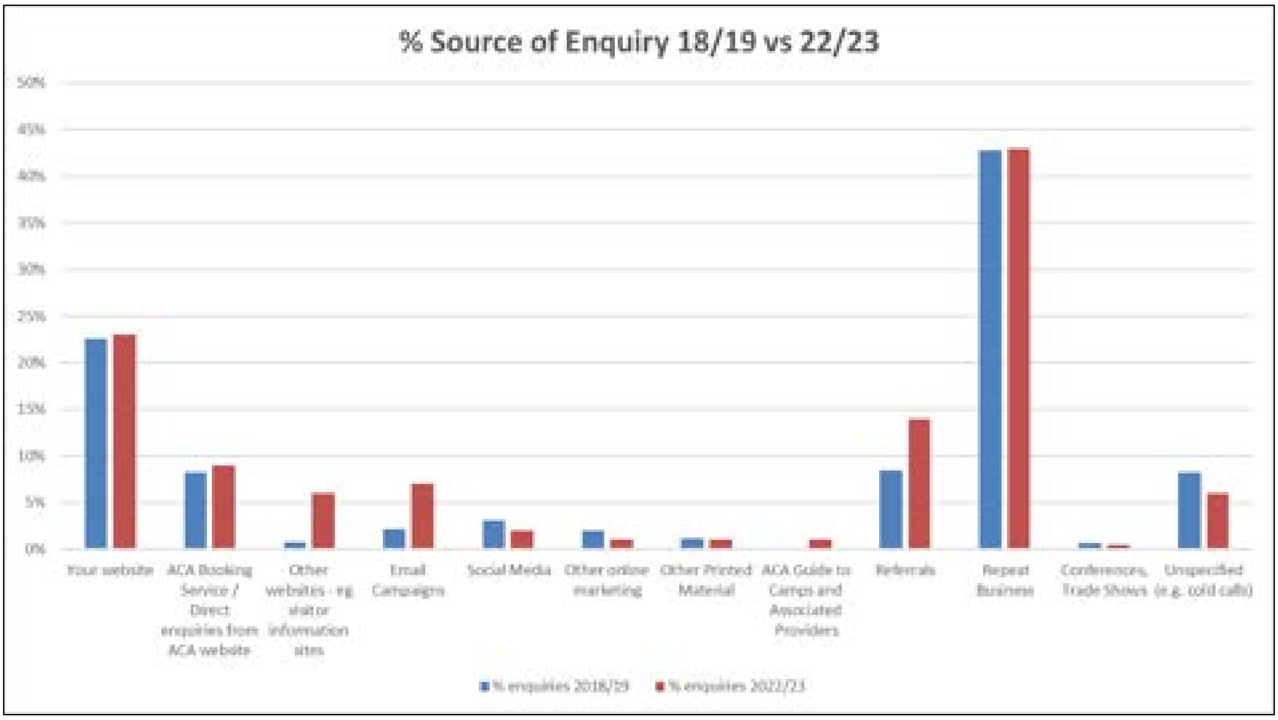
38 responses (86%).

Enquiry Source by Ranking

Source	% Enquiries 2022/23	% Enquiries 2018/19	% Difference Between 2018/2019 and 2022/2023
Your Website	23%	22.6%	0.4
ACA Booking Service / Direct Enquiries from ACA Website	9%	8.2%	0.8
Other Websites (e.g. visitor information sites)	6%	0.8%	5.2
Email Campaigns	7%	2.2%	4.8
Social Media	2%	3.1%	(1.1)
Other Online Marketing	1%	2.0%	(1)
Other Printed Material	1%	1.1%	(0.1)
ACA Guide to Camps and Associated Providers	1%		1
Referrals	14%	8.4%	5.6
Repeat Business	43%	42.8%	0.2
Conferences, Trade Shows	0.5%	0.7%	(0.2)
Unspecified (e.g. cold calls)	6%	8.2%	(2.2)

Responses in brackets ( ) indicate a negative number.


% Source of Enquiry 2022/23
20%
8%
5%
6%
2%
1%
0%
2%
13%
38%
0%
5%
Your website
ACA Booking Service / Direct enquiries from ACA website
Other websites - eg visitor information sites
Email Campaigns
Social Media
Other online marketing
Other Printed Material
ACA Guide to Camps and Associated Providers
Referrals
Repeat Business
Conferences, Trade Shows
Unspecified


% Source of Enquiry 18/19 vs 22/23
50%
45%
40%
35%
30%
25%
20%
15%
10%
5%
0%
Your website
ACA Booking Service / Direct enquiries from ACA website
Other websites - eg visitor information sites
Email Campaigns
Social Media
Other online marketing
Other Printed Material
ACA Guide to Camps and Associated Providers
Referrals
Repeat Business
Conferences, Trade Shows
Unspecified (e.g. cold calls)
% enquiries 2018/19
% enquiries 2022/23

3.3 Actual Bookings Made

39 responses (84%).

Responses ranged from 11 to 1,692 bookings made, with an average of 169. If we remove the outlying maximum (which may include day visits), we then see a range of 11 to 673, with an average of 129, which is more consistent with the previous report.

3.4 Conversion Rate

38 responses (86%).

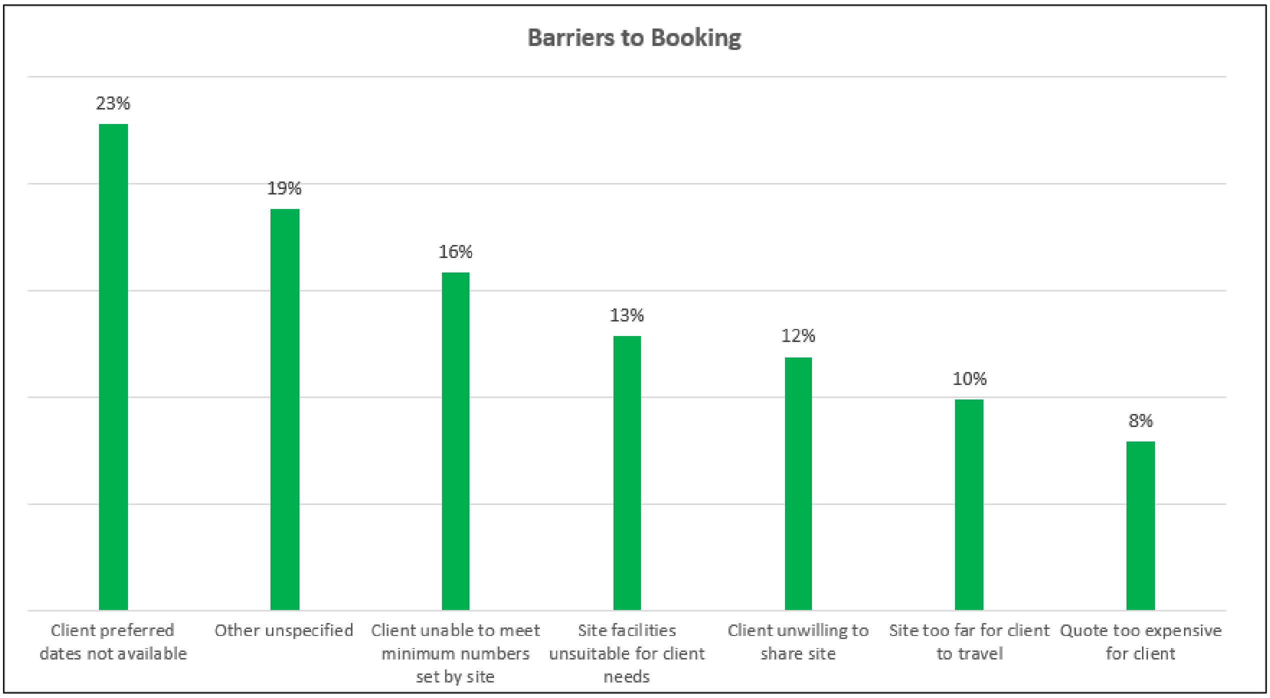
Responses ranged from 0% to 87% conversion rates, with an average of 46%.

Last Survey's data for comparison: responses ranged from 8% to 87%, with an average of 43%.

3.5 Reasons for not Converting the Enquiry into a Booking

36 responses (82%).

Rank	2022/23 Reason	2018/19 Reason	2016/17 Reason
1	Dates not available	Dates not available Too expensive	Dates not available
2	Quote too expensive	Site not suitable Client unable to meet minimum numbers	Site not suitable
3	Client unable to meet minimum numbers set by site	Unspecified	Too expensive
4	Site facilities unsuitable for client needs	Client unwilling to share site Too far to travel	Client unable to meet minimum numbers
5	Client unwilling to share site		Unspecified Too far to travel
6	Other (unspecified)		Client unwilling to share site
7	Site too far for client to travel		



3.6 Client Type

39 responses (89%).

In in this survey, we have expanded client type response options to better understand the diversity of school and community groups. This will allow us to better measure booking types such as weddings, corporate, disability groups, etc.

While many providers cater to a variety of client types, it is worth noting that not all sites are open to all user groups (e.g. some camps cater to schools only, some cater to community groups only, depending on their ownership and mission).

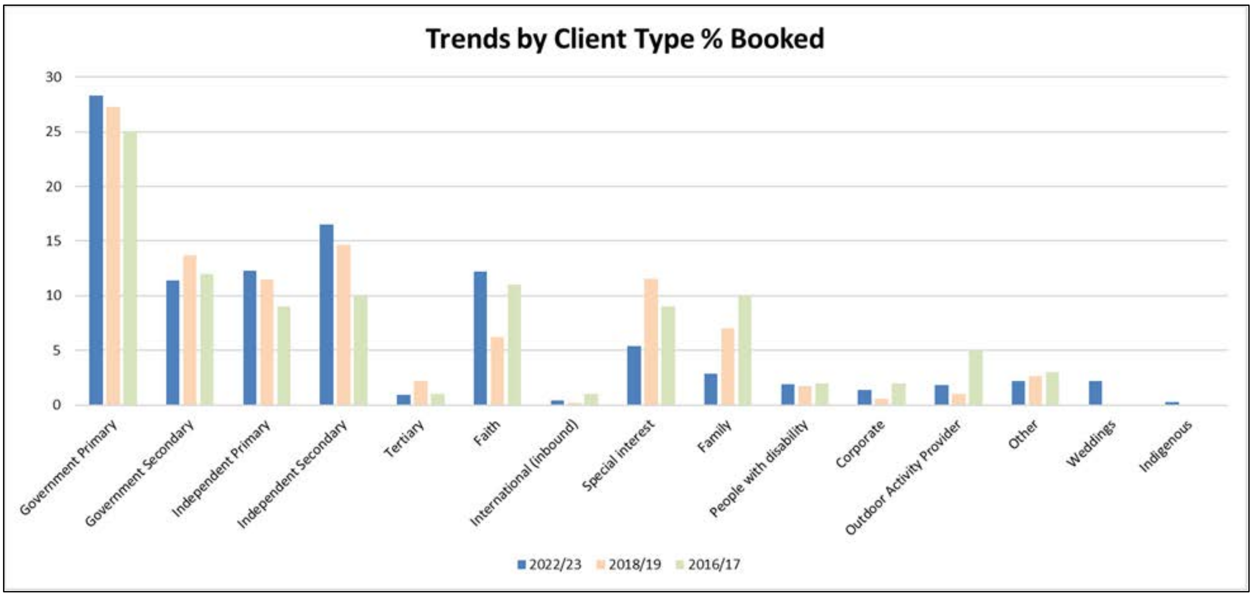
The table below shows client type by ranking, indicating that:

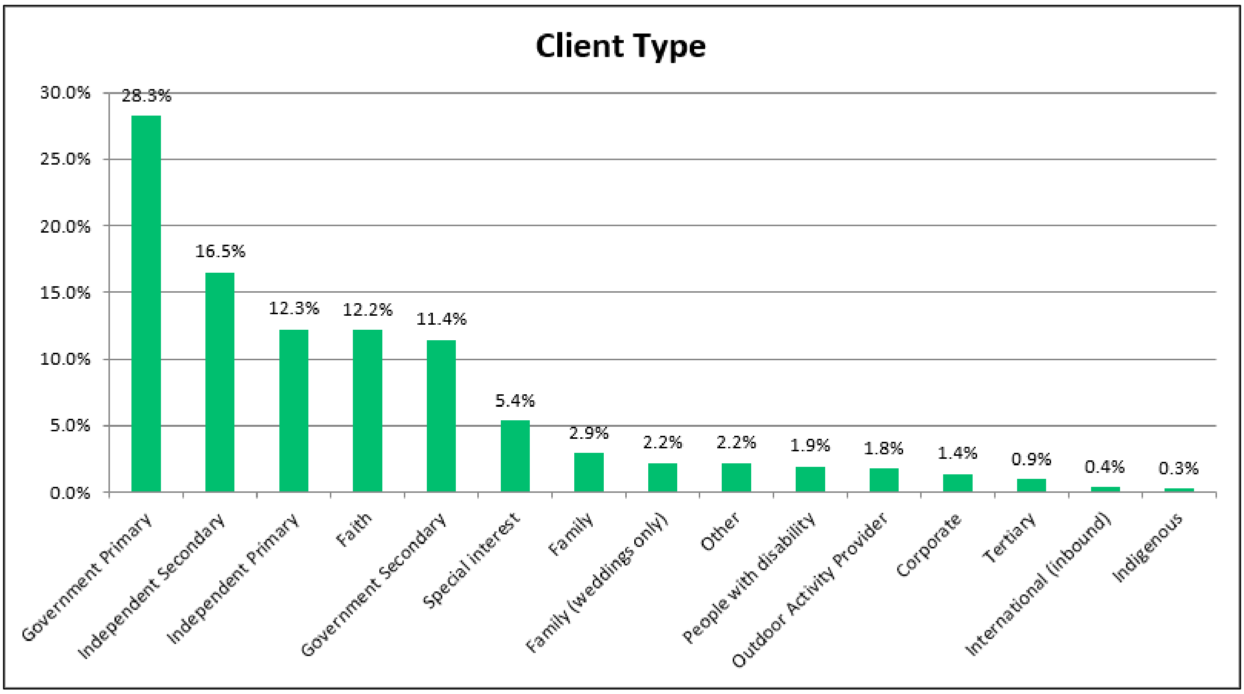
- Government Primary continues to hold rank 1, which is consistent with the last two reports.
- Independent Secondary holds rank 2 as per the previous report.
- Independent Primary school have increased from 5th ranking to 3rd.
- The percentage of clients from Government Secondary schools continues to decline across the last three reports (2nd to 5th ranking).
- Faith-based bookings have increased ranking significantly from last report, from 7th ranking to 4th.

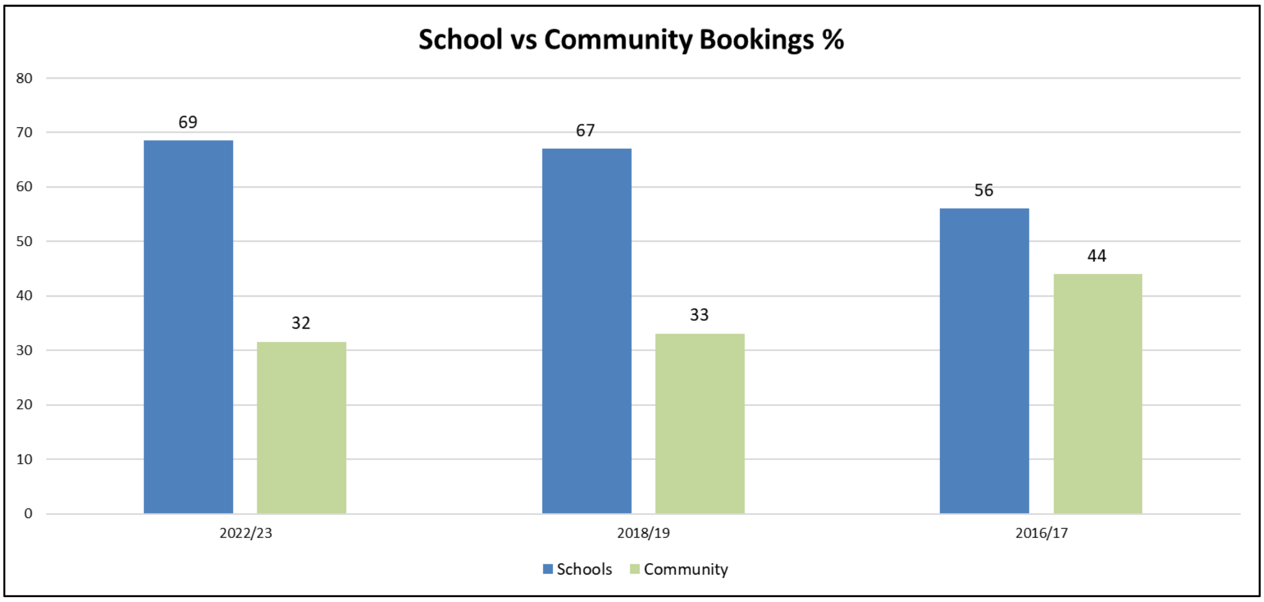
Client Type by Ranking

Rank	Client Type 2022/23	Client Type 2018/19	Client Type 2016/17
1	Government Primary School	Government Primary School	Government Primary School
2	Independent Secondary School	Independent Secondary School	Government Secondary School
3	Independent Primary School	Government Secondary School	Faith
4	Faith (any denomination)	Special Interest*	Independent Secondary School
5	Government Secondary School	Independent Primary School	Independent Primary School
6	Special Interest*	Family**	Family**
7	Family**	Faith	Special Interest*
8	Weddings	Other	Outdoor Activity Provider
9	Other	People with Disabilities Tertiary***	Other
10	People with Disability	Corporate Outdoor Activity Provider	People with Disabilities
11	Outdoor Activity Provider	International (Inbound)	Corporate
12	Corporate		International (inbound)
13	Tertiary***		Tertiary***
14	International (inbound)		
15	Indigenous		

** Special Interest (e.g. clubs, including university social clubs, etc.)*
*** Family – other (i.e. reunions, holidays, etc.)*
**** Tertiary (curriculum linked, not social clubs)*


Trends by Client Type % Booked
30
25
20
15
10
5
0
Government Primary
Government Secondary
Independent Primary
Independent Secondary
Tertiary
Faith
International (inbound)
Special interest
Family
People with disability
Corporate
Outdoor Activity Provider
Other
Weddings
Indigenous
2022/23
2018/19
2016/17


Client Type
30.0%
25.0%
20.0%
15.0%
10.0%
5.0%
0.0%
28.3%
16.5%
12.3%
12.2%
11.4%
5.4%
2.9%
2.2%
2.2%
1.9%
1.8%
1.4%
0.9%
0.4%
0.3%
Government Primary
Independent Secondary
Independent Primary
Faith
Government Secondary
Special interest
Family
Family (weddings only)
Other
People with disability
Outdoor Activity Provider
Corporate
Tertiary
International (inbound)
Indigenous



The chart above combines the 15 client types into two categories, Schools and Community. It reflects the trend of bookings the respondents received over the past three surveys showing the bulk of business continues to be derived from the school sector (average of 64% since 2016/17).

The Australian Bureau of Statistics (2023)[1] provides the following figures for 2023:

- 4,086,998 students were enrolled (up 138,187 students from 2019) in 9,629 schools (there were an increase of 126 schools).
- Over the five years to 2023, total student enrolments increased by 3.5%. Independent schools recorded the largest increase (14.1%), followed by Catholic schools (4.8%) and Government schools (0.7%).
- The majority of students were enrolled in Government schools (64.0%), followed by Catholic schools (19.7%) and Independent schools (16.3%).

The highest annual growth rates of student enrolments in 2023 were in:

- Western Australia: 2.1%
- Victoria: 2.0%
- Australian Capital Territory: 0.9%
- Queensland: 0.8%

Tasmania had a fall in growth rate of -0.6%.

See Appendix 1 for further information on the school sector.

Where the 2.6% of responses under 'Other – Not Listed' can be attributed to limitations on response options for 'Client Type', future Surveys will be amended to capture this data to gain further understanding.

[1] Source: Australian Bureau of Statistics – Schools, 2023

3.7 School Group Retention Rate

40 responses (91%).

Responses ranged from 0% to 100% of school group retention rates, with an average of 71%.

Last Survey's data for comparison: responses ranged from 40% to 100%, with an average of 80%.

Responses of zero are likely to be providers who do not work with school groups, rather than zero retention.

3.8 Community Group Retention Rate

40 responses (91%).

Responses ranged from 0% to 100% of community group retention rates, with an average of 49%.

This average is naturally lower than the school group retention as community group bookings are often one-offs (e.g. weddings, re-unions, etc.). Additionally, responses of zero (8% of total responses) could reflect providers who do not work with community groups, rather than zero retention. Some zero retention can be expected due to the higher number of one-off bookings.

3.9 Groups Cancelling after Making a Booking

38 responses (86%).

Responses ranged from 0% to 19% groups cancelling after making a booking, with an average of 5%. While the range is consistent, the average has increased slightly from the previous survey's results.

Last Survey's data for comparison: Responses ranged from 0% to 20%, with an average of 2%.

3.10 Reasons for Cancellation

37 responses (84%).

Cancellation Reason by Ranking

Rank	2022/2023 Reason	2018/19 Reason	2016/17 Reason
1	Unable to meet minimum numbers	Change in client leadership*	Unable to meet minimum numbers
2	Cost	Change of dates	General client disorganisation
3	Change of client requirements	Unable to meet minimum numbers	Change of dates Change in client leadership*
4	Change of client leadership*	General client disorganisation	Change in client needs
5	Change of dates	Change in client needs	Loss of funding
6	Loss of funding	Cost	Cost
7	Natural disasters or adverse conditions	Unspecified	Adverse weather
8	General client disorganisation	Cancelled due to adverse weather Cancelled by venue due to lack of staff at camp**	Unspecified
9	Cancellation initiated by Camp Provider**	Loss of funding	Cancelled by venue due to lack of staff at camp**
10	Other Unspecified		

** Change of client leadership (e.g. teacher/principal)*

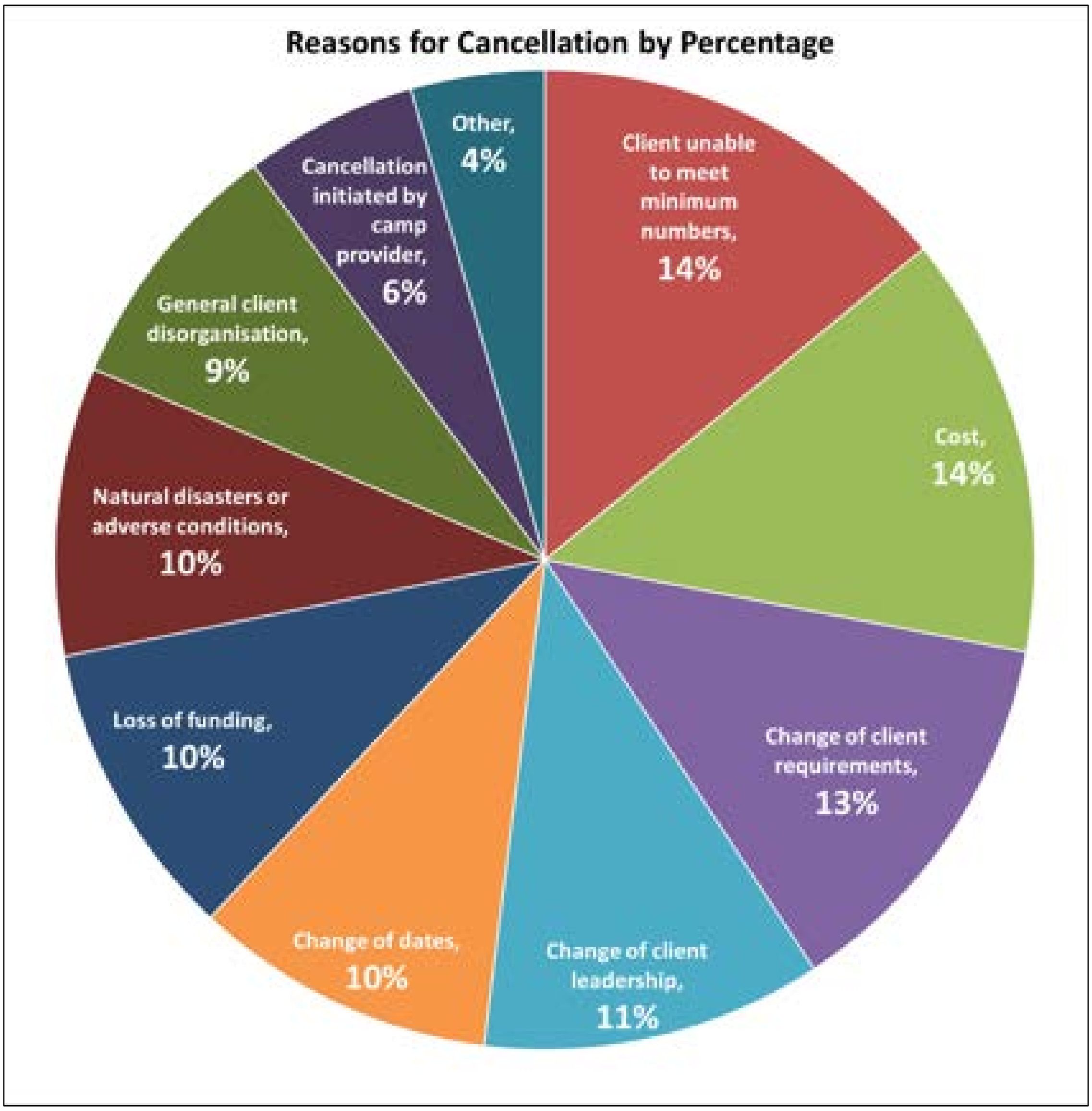
*** Cancellation initiated by Camp Provider (e.g. lack of available staff/resources on camp dates)*

The table above shows Cancellation Reason by Ranking and indicates:

- Client unable to meet minimum numbers has returned to the first ranked position from the third ranked position as the number one reason for cancellation.
- Cost as a reason for cancelling has risen significantly from 6th to 2nd ranking, along with loss of funding from 9th to 6th ranking.
- General client disorganisation has dropped across the last three reports from 2nd to 8th ranking.

The chart below shows the reasons for cancellation by percentage. The top three reasons for cancellations over the 2022/23 period are.

1. Client unable to meet minimum numbers (14%).
2. Cost (14%).
3. Change of Client Requirements (13%).



SECTION 4

RATES, CHARGES AND ACTIVITIES

SECTION 4: RATES, CHARGES AND ACTIVITIES

Catering: 4.1, 4.2, 4.3 and 4.4

- 97.5% of respondents offer full catering (consistent with last report).
- 70% of respondents offer a self-cater option (a decrease on last report of 7%).
- 15% of bookings request self-catering (a decrease on last report of 7%).
- 42.5% of respondents applied different charges for adult and child catering, which is an increase of 3.5% on last Survey.

Charges: 4.5 Full Catering

Item	2022/23 Average Charge (ex GST)	Difference from Last Report
One single bed night (lunch, dinner, breakfast) excluding program	$108	$34
As above including full activity program	$167	No comparative data
One three-day/two-night program (lunch on day one to lunch on day three) excluding program	$192	$36
As above including full activity program	$317	No comparative data

Charges: 4.6 Self Catering

Item	2022/23 Average Charge (ex GST)	Difference from Last Report
One single bed night	$41	($7)
One full weekend (arrive Friday night, depart Sunday after lunch)	$156	$66

Responses in brackets ( ) indicate a negative number.

Charges: 4.7 Other Charges

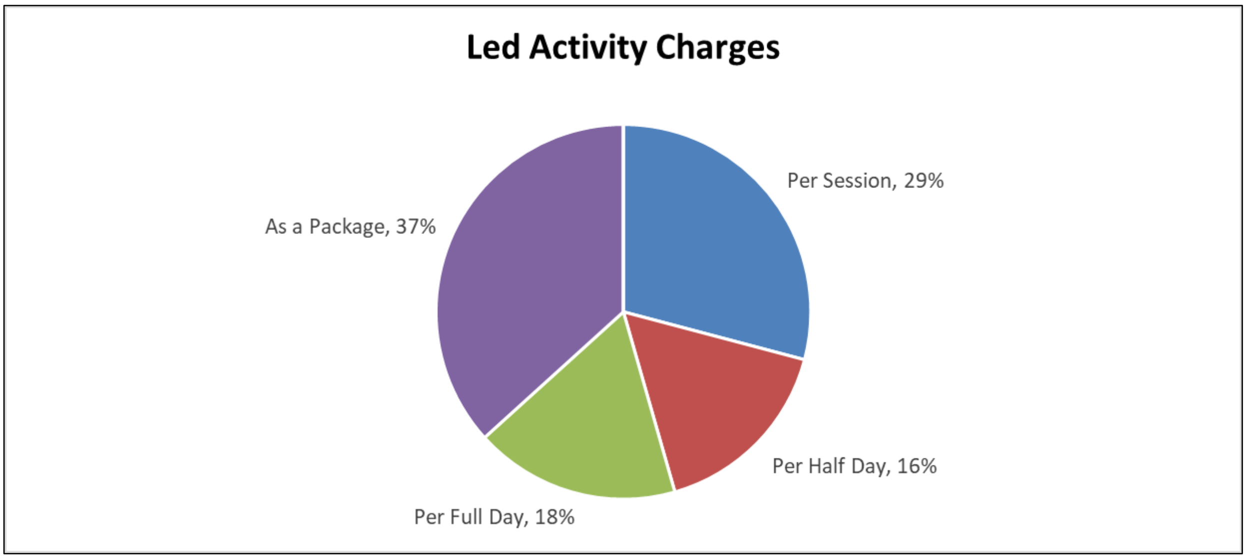
Item	2022/23 Average Charge (ex GST)	Difference from Last Report
Tent or caravan/motor home camping on site	$13	($7)
Day visits (no led activities) on site	$11	($6)
Cabin accommodation (including cleaning but not including catering or led activities)	$220	No comparative data

Responses in brackets ( ) indicate a negative number.

Program Provision: 4.8, 4.9, 4.10, 4.11, and 4.13

- 93% of respondents offered led activities.
- 78% of respondents offer a shared program delivery model (combined camp staff and teacher/leader facilitated). This is a 17% increase.
- 45% of respondents offer a journey option (i.e. camping off site). This is a slight increase of 42%.
- 75% of respondents offer separately chargeable led activity support (decrease of 7%).
- An average of 75% of clients request led activities (an increase of 9%).

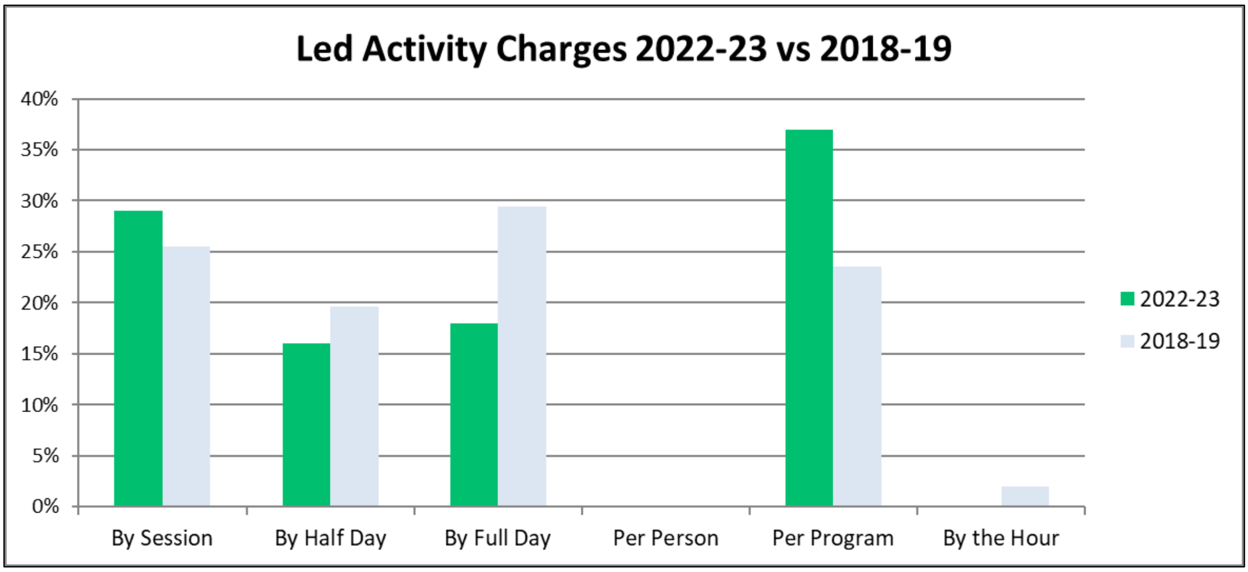
4.12 Led Activity Charges



In this Survey, the response options were slightly changed from the previous Survey; 'As a package', replaced 'per program'. The above pie chart shows that 37% of respondents offer charges for activities as a package and 29% of respondents offer the option of charging per session. Charge options of respondents show there has been an 11% decrease in those that offer charges 'Per Full Day' and a 13% increase for charging 'As a Package'.

Those who responded 'Other' added the following commentary:

- For school groups it is a package; for non-school groups it is per instructor / per hour.
- Separate charge for weekend groups; all school groups charged as a package.
- Per hour for self-catered groups.
- For school groups only, it's a package.



4.14 Activities on Site

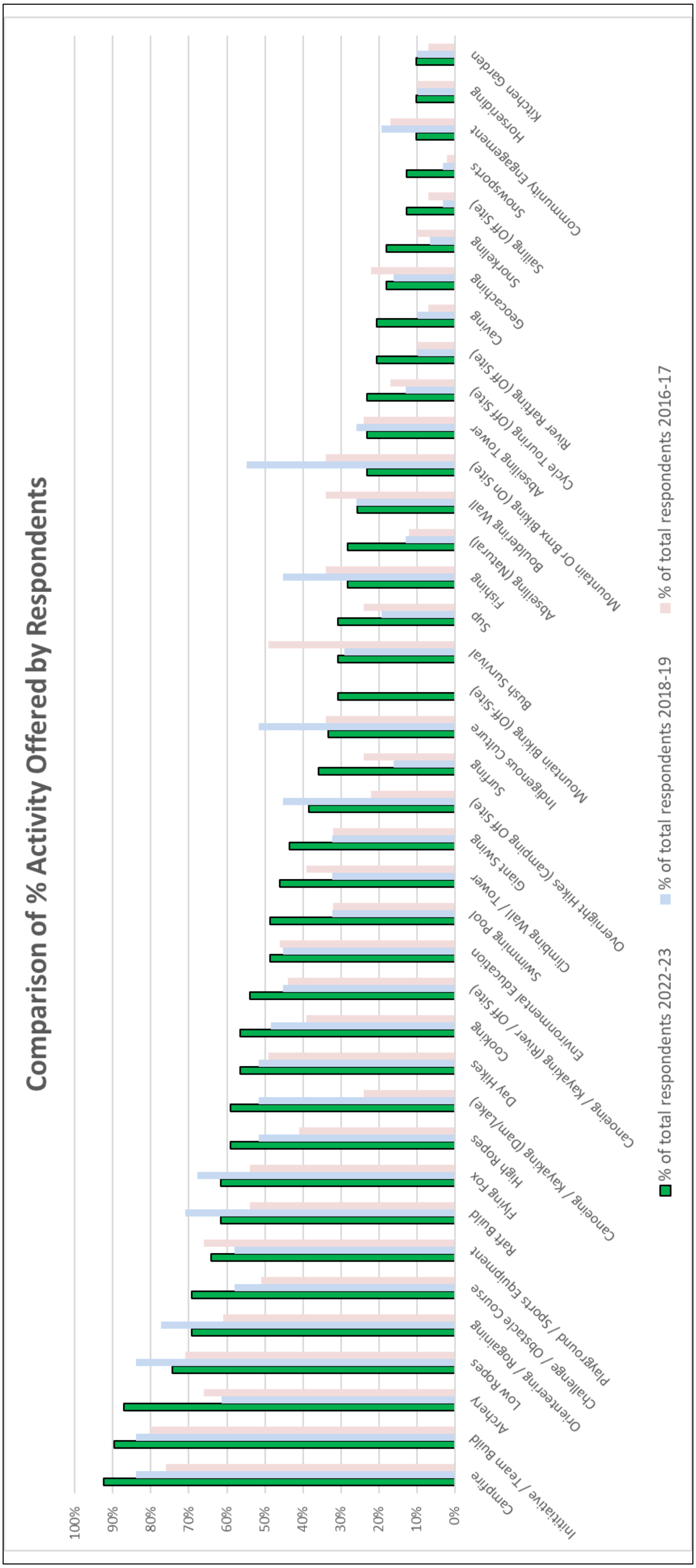
The number of activities on site ranged from zero (e.g. schools that run their own camp with basic facilities only) to 36, with the average being 16 (up from 15 in the 2018-19 Survey).

Activities mentioned as 'Other' comprise of, Bush Cooking, Gaga ball, Trampolines, Mountain Boarding, Possum Glider, Frisbee Golf, Farm Work, and Milking Cows.

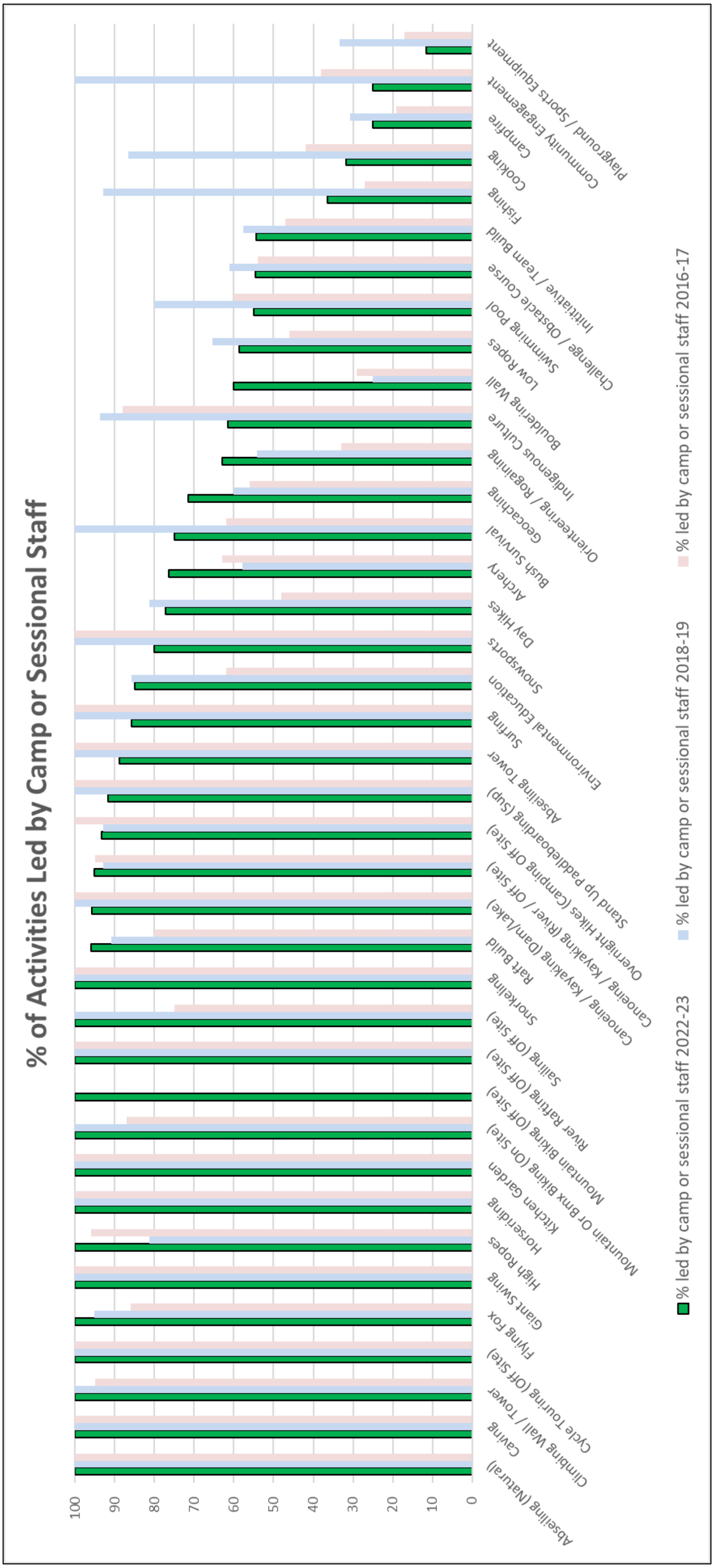
Activity by Rank

Activity	% of Total Respondents 2022-23	Difference between 2018/19 and 2022/23
Campfire	92%	8%
Initiative / team building	90%	6%
Archery	87%	26%
Low Ropes	74%	-10%
Orienteering / rogaining	69%	-8%
Challenge / obstacle course	69%	11%
Playground / Sports Equipment	64%	6%
Raft Build	62%	-9%
Flying fox	62%	-6%
High Ropes	59%	7%
Canoeing / kayaking (enclosed dam or lake)	59%	7%
Day hikes	56%	5%
Cooking	56%	8%
Canoeing / kayaking (river, off site)	54%	9%
Environmental education	49%	4%
Swimming Pool	49%	16%
Climbing wall / tower	46%	14%
Giant Swing	44%	11%
Overnight Hikes (camping off-site)	38%	-7%
Surfing	36%	20%
Indigenous culture	33%	-18%
Mountain biking (off-site)	31%	*New Category to this Survey*
Bush survival	31%	2%
Stand Up Paddleboarding (SUP)	31%	11%
Fishing	28%	-17%
Abseiling (natural)	28%	15%
Bouldering wall	26%	0%
Mountain biking (on-site)	23%	-32%
Abseiling tower	23%	-3%
Cycle touring (off site)	23%	10%
River Rafting (off-site)	21%	11%
Caving	21%	11%
Geocaching	18%	2%
Snorkelling	18%	11%
Sailing (off-site)	13%	10%
Snowsports	13%	10%
Community engagement	10%	-9%
Horse riding	10%	1%
Kitchen garden	10%	1%

NOTE: An increase of respondents to this Survey in coastal areas (15%) is likely to be the cause of increases in some of the water/ocean-based activities (e.g. Surfing), rather than more businesses offering these activities across the sector.



Comparison of % Activity Offered by Respondents
100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Kitchen Garden
Horseriding
Community Engagement
Snowsports
Sailing (Off Site)
Snorkeling
Geocaching
Caving
River Rafting (Off Site)
Cycle Touring (Off Site)
Abseiling Tower
Mountain Or Bmx Biking (On Site)
Bouldering Wall
Abseiling (Natural)
Fishing
Sup
Bush Survival
Mountain Biking (Off-Site)
Indigenous Culture
Surfing
Overnight Hikes (Camping Off Site)
Giant Swing
Climbing Wall / Tower
Swimming Pool
Environmental Education
Canoeing / Kayaking (River / Off Site)
Cooking
Day Hikes
Canoeing / Kayaking (Dam/Lake)
High Ropes
Flying Fox
Raft Build
Playground / Sports Equipment
Challenge / Obstacle Course
Orienteering / Rogaining
Low Ropes
Archery
Initiative / Team Build
Campfire
% of total respondents 2022-23
% of total respondents 2018-19
% of total respondents 2016-17


% of Activities Led by Camp or Sessional Staff
0
10
20
30
40
50
60
70
80
90
100
Abseiling (Natural)
Caving
Climbing Wall / Tower
Cycle Touring (Off Site)
Flying Fox
Giant Swing
High Ropes
Horseriding
Kitchen Garden
Mountain Or Bmx Biking (On Site)
Mountain Biking (Off Site)
River Rafting (Off Site)
Sailing (Off Site)
Snorkeling
Raft Build
Canoeing / Kayaking (Dam/Lake)
Canoeing / Kayaking (River / Off Site)
Overnight Hikes (Camping Off Site)
Stand Up Paddleboarding (Sup)
Abseiling Tower
Surfing
Environmental Education
Snowsports
Day Hikes
Archery
Bush Survival
Geocaching
Orienteering / Rogaining
Indigenous Culture
Bouldering Wall
Low Ropes
Swimming Pool
Challenge / Obstacle Course
Initiative / Team Build
Fishing
Cooking
Campfire
Community Engagement
Playground / Sports Equipment
% led by camp or sessional staff 2022-23
% led by camp or sessional staff 2018-19
% led by camp or sessional staff 2016-17

SECTION 5
EMPLOYMENT

PART 5: EMPLOYMENT

This set of questions gauged staff levels, staff turnover, use of subcontractors and volunteers and finally provided some indication of the use of local services.

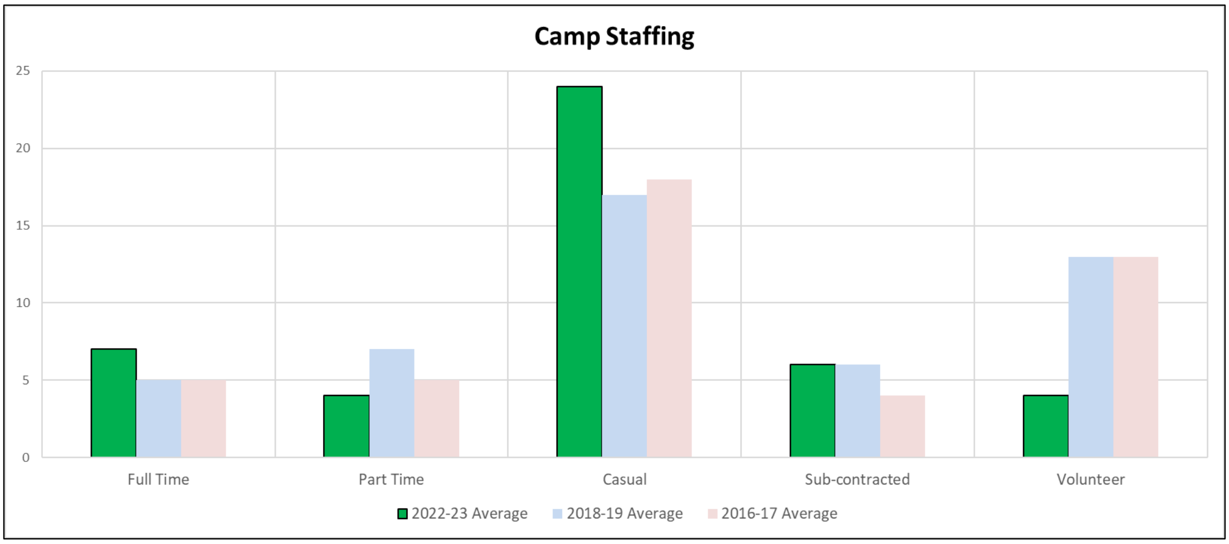
40 responses (91%).

Staffing: 5.1, 5.4 and 5.5

Full time staff on payroll	36 respondents have full time staff (90% of respondents to this question.) Range: 1 – 22 full time staff. Average: 7 full time staff.
Part time staff on payroll	31 respondents have part time staff (78% of respondents to this question). Range: 1 – 16 part time staff. Average: 4 part time staff.
Casual staff on payroll	38 respondents have casual staff (95% of respondents to this question). Range: 2 – 88 casual staff. Average: 24 casual staff.
Volunteers assisting paid staff	9 respondents engage volunteers (24% of respondents to this question). Range: 1 – 10 Average: 4 volunteers.
Sub-contracted staff employed	21 respondents engaged subcontractors (58% of respondents to this question). Range: 1 – 20 sub-contracted staff employed. Average: 6 sub-contracted staff employed.

The graph below illustrates the following trends observed since the previous Surveys:

1. An increase in full time and casual employment.
2. A decrease in part time and volunteer* employment.
3. Sub-contracted employment remains constant.



Employment Trends

**NOTE: Volunteers saw a significant drop from 70 volunteers (average 13) in the last Survey, which is due to the change in respondents, with less volunteer-based organisations responding to this Survey, not necessarily a reflection of a drop in volunteers across the sector.*

Using the estimated total camps in Australia of 609, estimated total employment (excluding volunteer staff) across all camps during the 2022/23 financial year is 24,969 positions (27,405 positions including volunteers).

	Difference between current and last survey	2022-23 Positions	2018-19 Positions	2016-17 Positions
Full Time	1,428	4,263	2,835	2,335
Part Time	-1,533	2,436	3,969	2,355
Casual	4,977	14,616	9,639	8,478
Sub-contracted	252	3,654	3,402	1,884
Volunteer	-4,935	2,436	7,371	6,123
Total	**189**	**27,405**	**27,216**	**21,195**

5.2 How many Full Time Equivalent (FTE) staff did you employ during the 2022-2023 FY?

Range: 1 – 69 FTE staff were employed.

Average: 11 FTE staff were employed.

5.3 How many staff left your employ in the Survey period?

Fulltime	Range: 0 - 9
	Average: 1.2
Part time	Range: 0 - 5
	Average: 0.5
Casual	Range: 0 - 20
	Average: 5.8

5.6 How many local suppliers (within 30 minutes travel of your camp) did you purchase goods or services from during the 2022-23 FY?

Range: 4 – 72 local suppliers.

Average: 16 local suppliers.

5.7 Do you Outsource Food Service

87% of respondents do not outsource food service.

SECTION 6

FINANCIAL INFORMATION

SECTION 6: FINANCIAL INFORMATION

A small percentage of respondents (14%) chose not to provide financial data, some of which were part of a larger commercial organisation and unable to/chose not to indicate allocation of some costs back to parent company.

6.1 Turnover

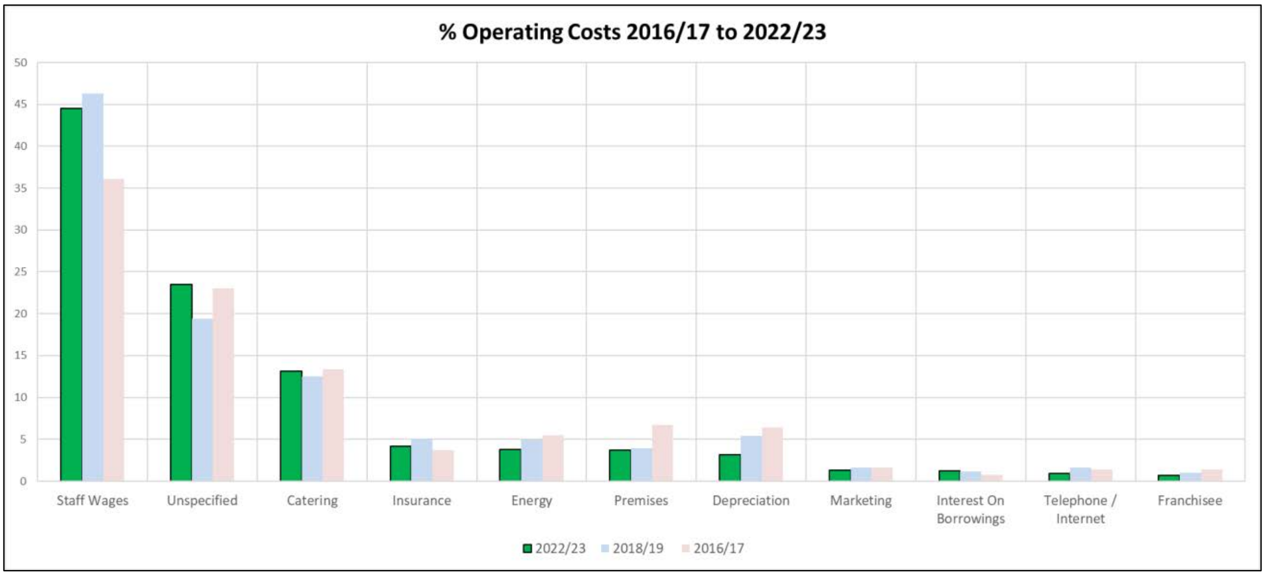
38 responses (86%).

Responses ranged from $60,000 to $11,011,460, with an average of $2,394,966.

Multiplying the average turnover by the estimated national number of camps (609), gives us an indicative total of the Australian Camp sector turnover of $1.45B.

6.2 Operating Expenditure

38 responses (86%).



Cost Centre Trends from 2022/23 back to 2016/17

Operating Expense Item	% Difference Between Current and Last Survey	2022/23 %	2018/19 %	2016/17 %
Staff Wages	(1.8)	44.5	46.3	36.1
Unspecified	4.1	23.5	19.4	23
Catering	0.6	13.1	12.5	13.4
Insurance	(0.9)	4.2	5.1	3.7
Energy	(1.2)	3.8	5.0	5.5
Premises	(0.2)	3.7	3.9	6.7
Depreciation	(2.2)	3.2	5.4	6.4
Marketing	(0.3)	1.3	1.6	1.6
Interest on Borrowings	0.1	1.2	1.1	0.8
Telephone / Internet	(0.7)	0.9	1.6	1.4
Franchisee	(0.3)	0.7	1.0	1.4

Responses in brackets ( ) indicate a negative number.

The table above indicates the top three Operating Expenditure categories. The top operating expenditure categories are:

1. Staff Wages (44.5%)
2. Unspecified (23.5%)
3. Catering (13.1%)

The comparison from previous Survey shows an increase in the ‘Unspecified’ category (up 4.1%). This indicates a need for the Survey to capture what costs fall under ‘Unspecified’.

Insurance costs continue to be an issue for our sector (ranking at number 4).

6.3 Capital Expenditure

35 responses (80%).

Responses ranged from $0 to $9.5M, with an average of $782,665.

The average capital expenditure continues to increase over the past two Surveys:

Financial Year	Average Capital Expenditure	Difference from Previous Survey
2022/23	$782,665	169%*
2018/19	$290,669	27%
2016/17	$228,187	38%

* The significant increase in the average capital expenditure can be attributed to two large outliers (the average capital expenditure without these outliers becomes 300,355 with the difference from last Survey being 3%).

SECTION 7

APPENDICES

APPENDIX 1: SCHOOLS, AUSTRALIA, 2023 REPORT EXTRACT

Schools by Sector and Type 2016 – 2023

	2016	2017	2018	2019	2020	2021	2022	2023
Independent								
Primary only	214	216	216	211	211	212	202	199
Secondary only	48	51	48	54	55	59	60	65
Combined	688	693	703	713	720	729	755	757
Special	92	101	111	110	119	127	132	132
Total	**1,042**	**1,061**	**1,078**	**1,088**	**1,105**	**1,127**	**1,149**	**1,153**
Catholic								
Primary only	1,239	1,243	1,246	1,248	1,248	1,243	1,237	1,237
Secondary only	321	321	323	319	326	324	325	320
Combined	138	141	144	149	144	149	157	160
Special	40	39	40	40	44	46	47	47
Total	**1,738**	**1,744**	**1,753**	**1,756**	**1,762**	**1,762**	**1,766**	**1,764**
Government								
Primary only	4,780	4,769	4,778	4,786	4790	4801	4794	4801
Secondary only	1,035	1,036	1,043	1,043	1052	1059	1059	1068
Combined	490	502	494	497	499	496	505	505
Special	329	332	331	333	334	336	341	338
Total	**6,634**	**6,639**	**6,646**	**6,659**	**6,675**	**6,692**	**6,699**	**6,712**
All Sectors								
Primary only	6,233	6,228	6,240	6,245	6,249	6,256	6,233	6,237
Secondary only	1,404	1,408	1,414	1,416	1,433	1,442	1,444	1,453
Combined	1,316	1,336	1,341	1,359	1,363	1,374	1,417	1,422
Special	461	472	482	483	497	509	520	517
Total	**9,414**	**9,444**	**9,477**	**9,503**	**9,542**	**9,581**	**9,614**	**9,629**

Source: Table 35b Number of All Schools by States and Territories, Affiliation and School type, 2010-2023

FTE Enrolments by Sector and Type 2016 – 2023

	FTE Enrolments			Enrolments - % in each Sector		
	Primary	Secondary	All Levels	Primary	Secondary	All Levels
2016						
Government	1,520,008	952,657	2,472,665	69.9%	59.1%	65.3%
Catholic	404,869	361,952	766,820	18.6%	22.5%	20.3%
Independent	250,548	296,384	546,931	11.5%	18.4%	14.4%
Total	**2,175,424**	**1,610,992**	**3,786,416**	**100.0%**	**100.0%**	**100.0%**
2017						
Government	1,553,865	962,613	2,516,478	70.2%	59.2%	65.5%
Catholic	405,695	360,956	766,650	18.3%	22.2%	20.0%
Independent	254,988	302,134	557,121	11.5%	18.6%	14.5%
Total	**2,214,547**	**1,625,703**	**3,840,249**	**100.0%**	**100.0%**	**100.0%**
2018						
Government	1,579,864	973,660	2,553,524	70.3%	59.3%	65.7%
Catholic	405,369	360,143	765,512	18.0%	21.9%	19.7%
Independent	261,927	307,590	569,518	11.7%	18.7%	14.6%
Total	**2,247,160**	**1,641,394**	**3,888,554**	**100.0%**	**100.0%**	**100.0%**
2019						
Government	1,594,745	995,631	2,590,376	70.5%	59.2%	65.7%
Catholic	404,228	365,263	769,491	17.9%	21.7%	19.5%
Independent	264,234	319,610	583,844	11.7%	19.0%	14.8%
Total	**2,263,207**	**1,680,504**	**3,943,711**	**100.0%**	**100.0%**	**100.0%**
2020						
Government	1,596,654	1,028,044	2,624,698	70.4%	59.3%	65.6%
Catholic	403,685	374,711	778,396	17.8%	21.6%	19.5%
Independent	267,853	330,939	598,792	11.8%	19.1%	15.0%
Total	**2,268,192**	**1,733,695**	**4,001,887**	**100.0%**	**100.0%**	**100.0%**
2021						
Government	1,583,254	1,034,854	2,618,108	69.8%	58.9%	65.0%
Catholic	406,816	380,179	786,995	17.9%	21.6%	19.6%
Independent	277,259	343,071	620,330	12.2%	19.5%	15.4%
Total	**2,267,329**	**1,758,103**	**4,025,432**	**100.0%**	**100.0%**	**100.0%**
2022						
Government	1,553,097	1,047,964	2,601,061	69.1%	58.5%	64.4%
Catholic	408,627	386,576	795,203	18.2%	21.6%	19.7%
Independent	285,204	355,646	640,850	12.7%	19.9%	15.9%
Total	**2,246,928**	**1,790,187**	**4,037,115**	**100.0%**	**100.0%**	**100.0%**
2023						
Government	1,553,245	1,056,051	2,609,296	68.7%	58.0%	63.9%
Catholic	411,795	394,385	806,181	18.2%	21.6%	19.8%
Independent	294,587	371,567	666,154	13.0%	20.4%	16.3%
Total	**2,259,627**	**1,822,003**	**4,081,631**	**100.0%**	**100.0%**	**100.0%**

Source: Australian Bureau of Statistics Table 43a Full-time Equivalent Students by Affiliation, Sex, Grade and Indigenous Status, States and Territories, 2006-2023

APPENDIX 2 - CHALLENGES FOR CONTINUED SUCCESS

Respondents were asked to identify their biggest challenges for future success, which are ranked under the following headings by number of relevant comments as follows:

Business Growth/Stability

- Bookings are our number one priority now we have staff. We are looking at options to develop our small centre. We have now built in an expedition program.

Increased External Pressures

- Victorian Teachers Enterprise Barganing Agreement (EBA) - specifically Time In Leiu
  - *In 2023 the Victorian Government and Victorian Teachers entered a new EBA which outlined requirements of Time In Leiu for teachers. (Find actual wording to give more context).*
- Change in school booking patterns
- School funding for camps.
- Cost of living:
  - *Inflation.*
  - *Cost pressure on parents.*
  - *Increased costs - food insurance, wages.*
  - *Affordability of camps to schools.*
- *Increased Government Fees and Taxes*
- Parents more hesitant to send kids to camp, reducing overall numbers.

Staff

- Staff recruitment & training (lower bookings mean casual staff may not hang around, costly to re-train, difficult to replace in rural communities).
- Being in a regional and isolated location, securing staff is our hardest challenge and barrier to growth.
- Rebuilding staff numbers and experience after COVID.
- Staffing and transition planning.
- Staff shortages and skill set/experience in industry.
- Staffing, exposure.
- Securing appropriately trained staff who want to live remotely.

Regulation, Compliance and Risk Management

- The new Bush Fire Risk Ratings System
  - Education Departments approach to Extreme and Catastrophic ratings
- Insurance costs, availability and procurement.
- Regulatory requirements strangling the business (DET changes to water safety requirements, (ie we are not running canoeing or raft building now, can't afford to have 2 staff members tied up for kids paddling in an enclosed dam), insurance companies requiring more stringent formal training of staff etc).
- Changes within school and education department regarding the value of school camp, red tape in the system and costs to schools that are outside the control of individual camps.
- Increased teacher expectations (facilities and activities).
- Governance demands on admin.
- The time that it will take between making insurance claim, to when we finally receive the insurance report through to when we are able to resume hosting bookings again (and earning income).
- Natural disasters (fires/floods).

APPENDIX 3 - ESTIMATED TOTAL CAMPS AND BEDS BY STATE

The following table represents the ACA's current best estimation at time of publication of the number of residential camps[1] in each state.

State	Estimated number of residential camps[1]	Average beds per camp	Estimated total beds	% of total
ACT	14	186	2,609	3%
New South Wales	134	165	22,110	27%
Northern Territory	15	151	2,268	3%
South Australia	43	92	4,095	5%
Queensland	115	138	15,826	19%
Victoria	201	125	25,182	31%
Tasmania	26	87	2,260	3%
Western Australia	61	95	6,954	9%
Total	**609**	**130**	**81,304**	

[1]Venues offering group accommodation, generally with catering and led outdoor activities on site.

APPENDIX 4 – PRICING AND OCCUPANCY SURVEY QUESTIONS – QUICK REFERENCE GUIDE

Section 1: General Business Information	1.1 – Please provide your name (not published in this report). 1.2 – Please provide your email address (not published in this report). 1.3 – What is your property's business name (not published in this report). 1.4 – Where is your business located? 1.5 – In Which postcode is your premise located? 1.6 – Which of the below best describes the nature of your business? 1.7 – Which definition below best describes the management structure of your business? 1.8 – Is your business accredited with the Quality Tourism Framework (formerly ATAP)? 1.9 – If yes, is your site accredited with the Camps and Adventure Activity Provider module? 1.10 – Please tick any of the below that your business is also affiliated with /members of.
Section 2: Capacity and Occupancy	2.1 - Does your business provide overnight accommodation on site? 2.2 - What is your bed capacity (ie. how many 'sellable' beds do you have on site)? 2.3 - What is your Occupancy Rate for the 2022-2023 FY? 2.4 - What percentage of your guests visited your site or used your services for day activities only during the 2022-23 FY?
Section 3: Booking Patterns	3.1 - How many enquiries did you receive during the 2022 - 2023 FY? 3.2 - What percentage of your enquiries were sourced from: 3.3 - How many bookings (including repeat bookings from the same client from the previous FY) did you make in the 2022 – 2023 FY? 3.4 - What percentage of enquiries received were converted into bookings? 3.5 - What are the principle reasons for not converting the enquiry into a booking? 3.6 - What percentage of your clients were: **Retention (i.e. Return bookings)** 3.7 - What is your estimated retention rate (%) for school groups? (i.e. what percentage re-booked for the 2022 - 2023 FY from the previous FY, or previous cycle if they come every second year?) 3.8 - What is your estimated retention rates for community groups? **Cancellations** 3.9 - What percentage of your bookings (if any) were cancelled after booking? 3.10 - What are the top three reasons for cancellations?
Section 4: Charges and Rates	**Catering (Camps Only)** 4.1 - Do you offer full catering? 4.2 - Do you offer a self-cater option? 4.3 - What percentage of your bookings request self-catering? 4.4 - Do you differentiate your catering charges by child or adult? 4.5 - Please provide your 2022 – 2023 FY full catering rates per adult for. 4.6 - Please provide your 2022 – 2022 FY self-catering rates (including any associated charges such as kitchen hire, cleaning, etc) for. **Facility Use (Camps Only)** 4.7 - Please provide your 2022 – 2023 FY rates for the following items (per person, per bed night). **Program Provision** 4.8 - Do you offer led activities? 4.9 - Do you offer shared programming? 4.10 - Do you offer a led journey program (ie camping off site)? 4.11- Do you offer separately chargeable led activity support? (i.e. charging a separate rate over and above the fee for accommodation/catering). 4.12 - How do you charge for led activities? 4.13 - What percentage of your clients request led activities (in part or full)? 4.14 - What activities do you offer?
Section 5: Employment	5.1 - How many staff did you have on your payroll in the 2022 – 2023 FY (whole year or part of year)? 5.2 - How many FTE (Full Time Equivalent) staff did you employ during the 2022 – 2023 FY? (see example calculations on page 4). 5.3 - How many staff left your employ during the 2022 – 2023 FY? 5.4 - How many activity Sub-Contractors (ie high ropes or canoe instructors, etc - not cleaners for example) did you engage in the 2022 – 2023 FY? 5.5 - How many volunteers (unpaid) did you engage in the 2022 – 2023 FY? 5.6 - How many local suppliers (within 30 minutes travel of your camp) did you purchase goods or services from in the 2022 – 2023 FY? 5.7 Do you outsource food service?
Section 6: Financial Information	6.1 - What was your turnover in the 2022 – 2023 FY (nearest $10k)? 6.2 - Please provide a breakdown of your operating expenditure into the following broad categories. 6.3 - What was your total capital expenditure in the 2022 – 2023 FY? 6.4 Finally, what do you see as the biggest challenges (if any) to your business's continued success?

ABOUT THE AUSTRALIAN CAMPS ASSOCIATION

The 'for purpose' Australian Camps Association (ACA) is the national peak body for camps and associated providers. We develop, support and promote the delivery of camp experiences that provide positive community, social and personal outcomes.

Representing over 340 Members across Australia. Membership is open to amp operators, led outdoor activity providers, service providers, schools and individuals or organisations with an interest in the camps sector.
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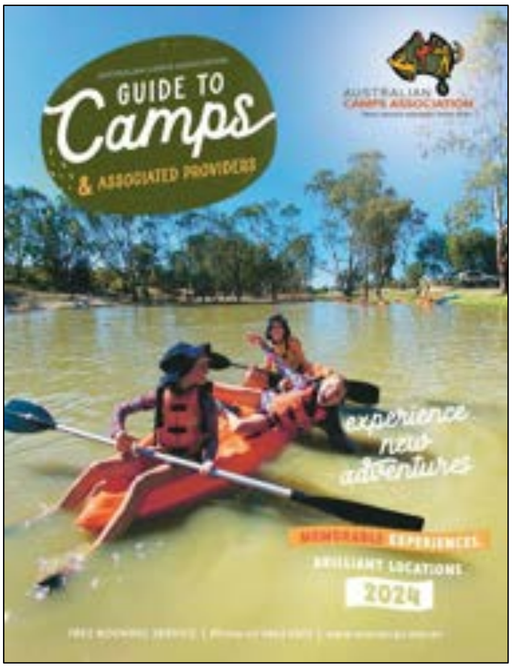
The Guide to Camps and Associated Providers



The annual *'Guide to Camps & Associated Providers'* is an essential resource for planning your next camp or activity day, wherever you are in Australia.

For your FREE copy of the latest 'Guide' please email us at info@auscamps.asn.au.

"I recently received a copy of your Guide to Camps & Outdoor Activity Providers. I think it is a very useful magazine to have and extremely well laid-out." - Marcela Lyall, Executive Secretary to the Deans of Middle and Senior School, St Augustine's College, Sydney.

The Australian Camps Association Guide to Camps and Outdoor Activity Providers (in its various forms) has been a valuable resource for over 20 years!

View online – www.auscamps.asn.au/about/guide-camps
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Free Booking Enquiry Service - Visit: http://www.auscamps.asn.au/booking-enquiry

Are you looking for a camp venue or a provider to run some adventure activities for your group? We want to make searching for a camp or activity provider as easy as possible for you. Just complete the booking enquiry form with your requirements – eg size of group, preferred location, dates and activities etc - and click 'submit'. Your enquiry will then be automatically sent to all ACA Members in the state you have selected.

"Over the years the Australian Camps Association have been instrumental in helping us find fantastic camp sites that our students have really loved. On behalf of all the students and teachers please convey our hearty thanks to all involved!" - Aryeh Goldman, Yesodei HaTorah

ABOUT ACA PROGRAMS

People Outdoors – Camps for Individuals Living with Disability

'Adventure For All'

People Outdoors, a program of the Australian Camps Association, was established in 1989 to provide outdoor recreation for people of all ages living with disability. The Australian Camps Association is a registered NDIS service provider accredited with the Quality Tourism Accreditation. We believe that camp based led outdoor experiences provide physical, emotional and social benefits for all people, regardless of their circumstances.

We have been providing camps in Victoria for more than 30 years. We are thrilled (as of 2024) to be now providing programs in Victoria, New South Wales and Queensland. Visit: www.peopleoutdoors.org.au

Great Getaways – Outdoor Programs for Over 55's

The Great Getaways give all individuals over the age of 55 a chance to try new activities and socialise with like-minded people in beautiful locations. All overnight Getaways are held at Australian Camps Association member camps that are accredited with the Quality Tourism Framework.

Activities change from Getaway to Getaway depending on what is available at each site. You may be participating in rock climbing, yoga, canoeing, initiative activities, bushwalking, high ropes course, indoor games and cycling to name a few. Everyone can take part, no matter what their fitness levels.

Accommodation at Getaways is in shared, dormitory style accommodation.

Find out more – www.auscamps.asn.au/camps-activities/camps-over-55s

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The Australian Camps Association is the national peak body for camps and associated providers.

Pricing and Occupancy Survey Report
2022-2023 Financial Year

P: 03 9863 6822
E: info@auscamps.asn.au
W: www.auscamps.asn.au