AUSTRALIAN
CAMPS ASSOCIATION
More people outdoors more often

PRICING AND OCCUPANCY SURVEY

REPORT

2018 – 2019 FINANCIAL YEAR

Index

Introduction

The Pricing and Occupancy Survey has been conducted by the Australian Camps Association (ACA) since 2006. It was conducted every second year from 2006 to 2012, then the 2016/17 FY and the 2018/19 FY.

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 2018 – 2019 financial year and was conducted from November 2019 to January 2020.

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.

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.

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 all of those members who contributed to this Report.

Pete Griffiths

Chief Executive Officer

The Australian Camps Association

July 2020

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 (ie not overnight)
Activity day	The number of guests on site on any given day (ie not overnight), usually associated with activity providers and/or day programs
ATAP	Australian Tourism Accreditation Program (now QTF)
Bed night	The number of beds occupied by paying guests
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 – eg two staff each employed on a 0.5 basis = 1 FTE
Full program	All of the program or activities 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 by your staff
Led journey program	Off site hiking and camping managed 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 year
QTF	Quality Tourism Framework (formerly ATAP)
Shared program	Your 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

Surveys were sent in hardcopy by post to 189 member camps and adventure activity providers. The Survey was open from November 2019 to January 2020. 31 responses (29 camps and two outdoor activity providers) were received, a response rate of 16%.

This is considered to be a slightly better than average response (a 10 – 15% response rate is recognised as average for this type of Survey).

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 particular question.

Full details follow in the body of the Report but below are some general trends that have emerged since the last Survey (2016/17 FY):

- The number of camps offering ensuited rooms is increasing in response to real or perceived demand. This is indicative of a more competitive and discerning market place. Other indicators of this include increased capital investment and increased bed capacity, although marketing spend remains very low (<2%, against an accepted norm of between 5 and 15% for B2C services).

- The average number of enquiries received by residential camps in a 12-month period is 211. On average, about 8% (ie 16 enquiries per camp, up from 8 in the previous Survey) of these enquiries are derived from the ACA's Booking Enquiry Service. (~900 enquiries are received by the ACA p.a. and are then distributed to member camps).

- The school market continues to grow in all sectors – government and independent – with consistent growth in bookings derived from government primary schools over the last four Surveys.

- Insurance, interest on borrowings and staff costs are increasing as a percentage of overall operating costs. Catering costs are decreasing as a percentage of overall operating costs.

- The most common activities offered remain low resource intensive ones, such as campfires, low ropes, orienteering and team building. However, there is a general trend towards increasing the camp staff leading of all activities, including those listed above.

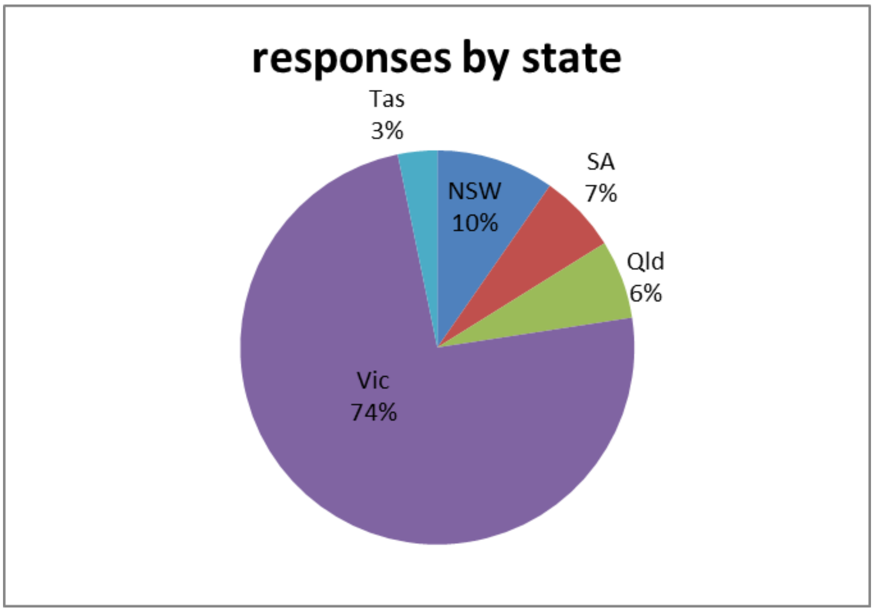
Data for this Survey was collected pre-COVID-19 and its publication has been delayed by the pandemic. It is fair to say that the sector is in a very different place than the Survey period, but nevertheless this Report is an accurate representation of the sector at that time.

Section 1 - General business information

Responses to questions 1.1, 1.2, 1.3 and 1.5 are related to specific contact details and are not published.

1.4 Business location

State	Respondents
NSW	3
South Australia	2
Queensland	2
Victoria	23
Tasmania	1
TOTAL	31

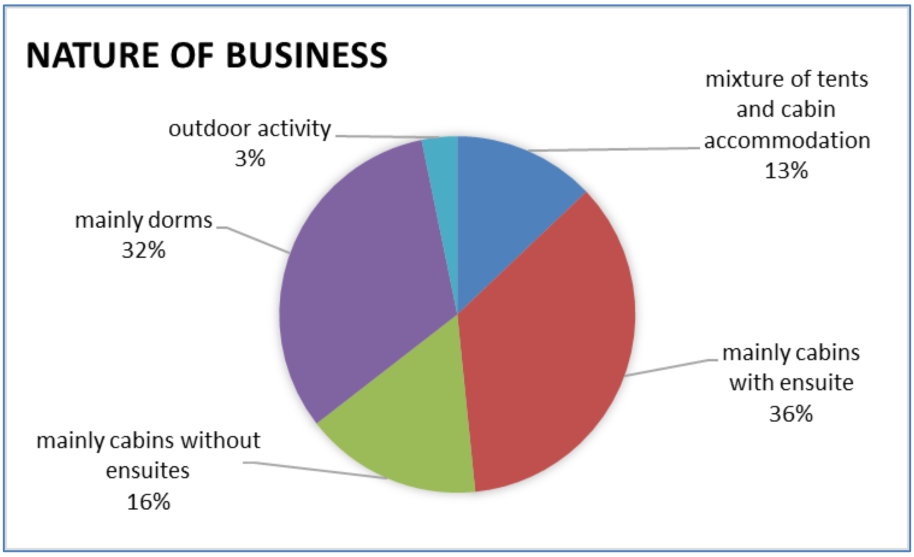


This response by state remains consistent with previous Surveys.
No responses were received from WA members.

1.6 Nature of the business

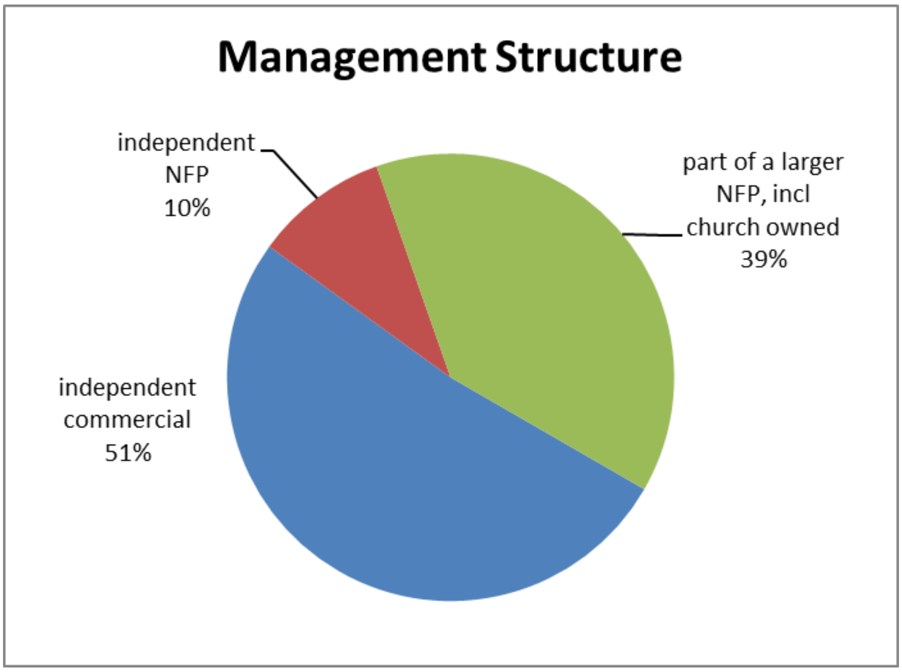
Nature of Business	Respondents
Mixture of tent and cabin accommodation	4
Mainly cabins (12 or less beds per building) with ensuite bathrooms	11
Mainly cabins (12 or less beds per building) without ensuite bathrooms	5
Mainly dormitories (13 or more beds per sleeping area)	10
Outdoor activity provider using subcontracted facilities	1

Comparison with previous Surveys shows a continuing trend towards ensuite bathroom accommodation (up from 13% in 2012 to 36% in this Survey), and an increase in sites offering tents as a part of their accommodation mix (up from 8% in 2016-17 to 13% in this Survey). This is indicative of the growth of glamping as an activity, and also of the need to increase capacity without increasing permanent structures on the site (cost and compliance).



1.7 Business type

Business type	Respondents
Independent commercial operator	16
Part of a larger commercial entity	0
Independent Not For Profit (NFP)	3
Part of a larger NFP entity, including church owned	12



This Survey has shown a continued trend for responses from independent commercial operators (0 responses in 2012, 17% in 2010, 40% in 2016-17 and now 51%). This may also be an indication of the direct interest commercial operators have in accessing the data derived from these Surveys.

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.

Organisation / scheme	Respondents	% of Respondents (previous Survey)
Quality Tourism Framework (QTF)	26	84% (81%)
QTF Camping and Adventure Activity (CAA) module	23	74% (77%)
National Accommodation, Recreation and Tourism Accreditation (NARTA)	2	6% (17%)
Both QTF and NARTA	1	3% (15%)
Christian Venues Association	3	9% (17%)
Outdoor Council of Australia	1	3% (4%)
Outdoors NSW	2	6% (6%)
Outdoors Victoria	10	32% (17%)
Outdoors Queensland	1	3% (8%)
South Australian TIC	2	6% (4%)
Victorian TIC	7	22% (4%)
Other (WATIC, OEA, QTIC, OEA, tourism bodies, etc)	4	12% (17%)

Section 2 – Capacity and occupancy rates

2.1 Overnight accommodation

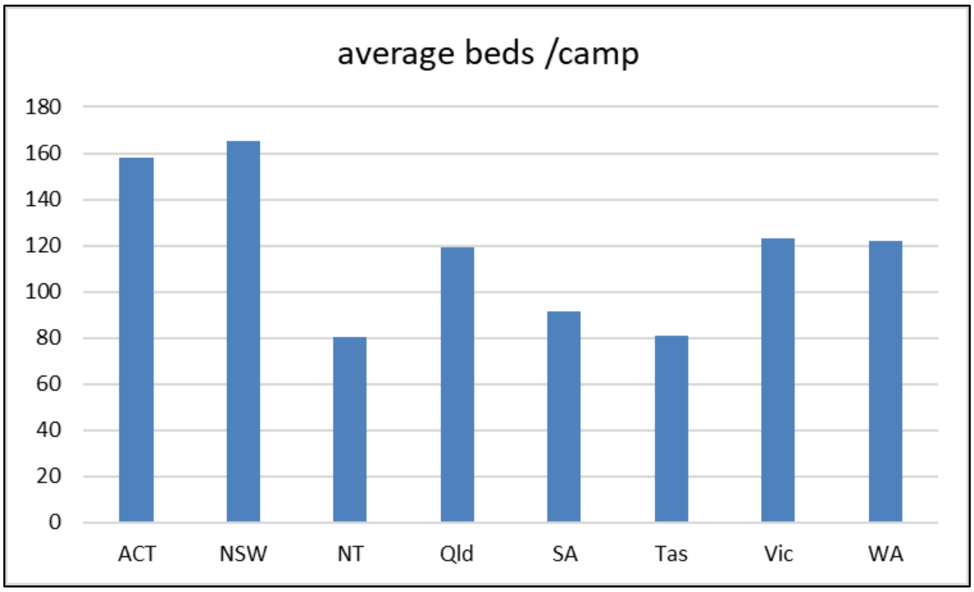
All respondents provide overnight accommodation, with one exception, an outdoor activity provider.

2.2 Bed capacity

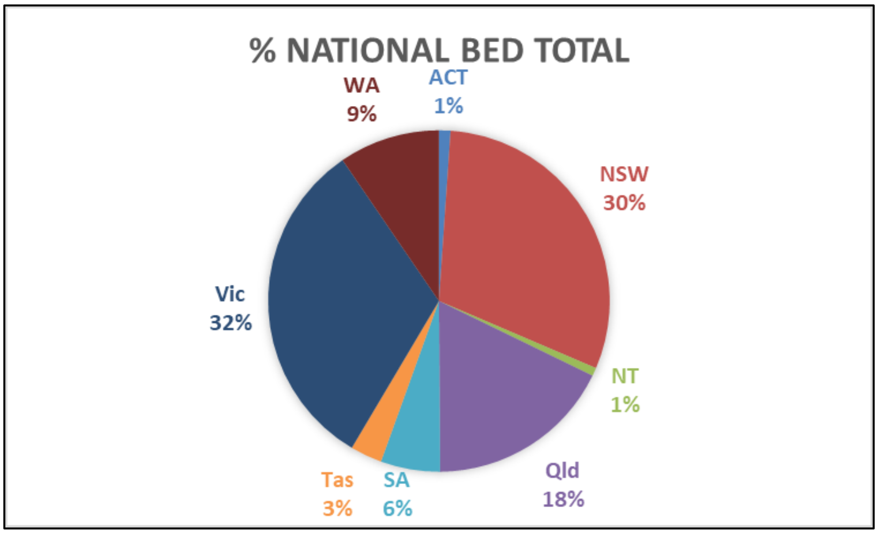
Respondent's bed capacity ranged from 22 to 1300, with an average of 206. Some of the higher bed capacity totals include fixed tent style accommodation (ie not free camping, but not permanent buildings either), and this has impacted on the data.

If we remove this highest value, the average bed capacity *of respondents* is 174. This is identical to the previous Survey.

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 8 to 50%, with an average of 23%.

2.4 Day usage of sites.

Taking out the outdoor activity providers, who had a majority of day use, the usage of sites as a single day venue ranged from 0% to 22% with an average of 10%.

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 who were not able (some may have been unwilling) to answer all questions, which indicates that this area (marketing and sales) is one that could use further marketing PD.

3.1 How many enquiries did you receive during the 2018/19 FY?

23 responses (76%)

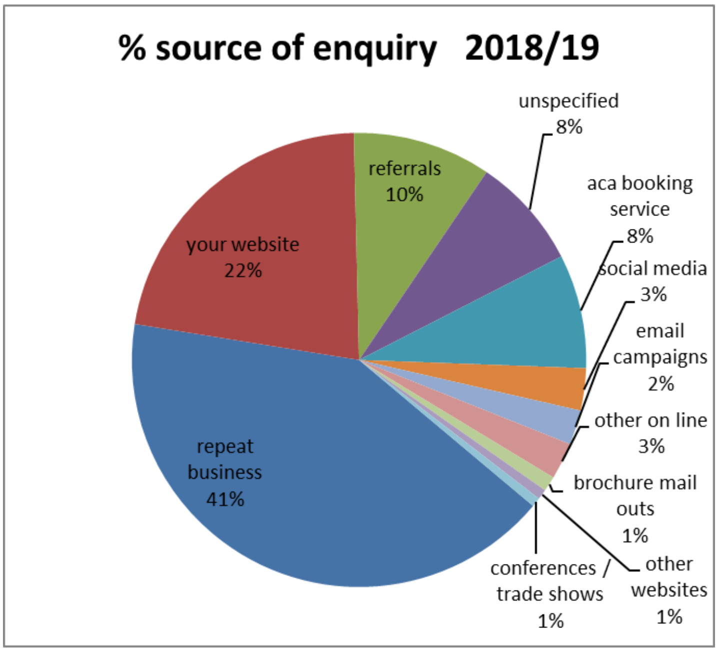
Responses ranged from 12 to 519, with an average of 211.

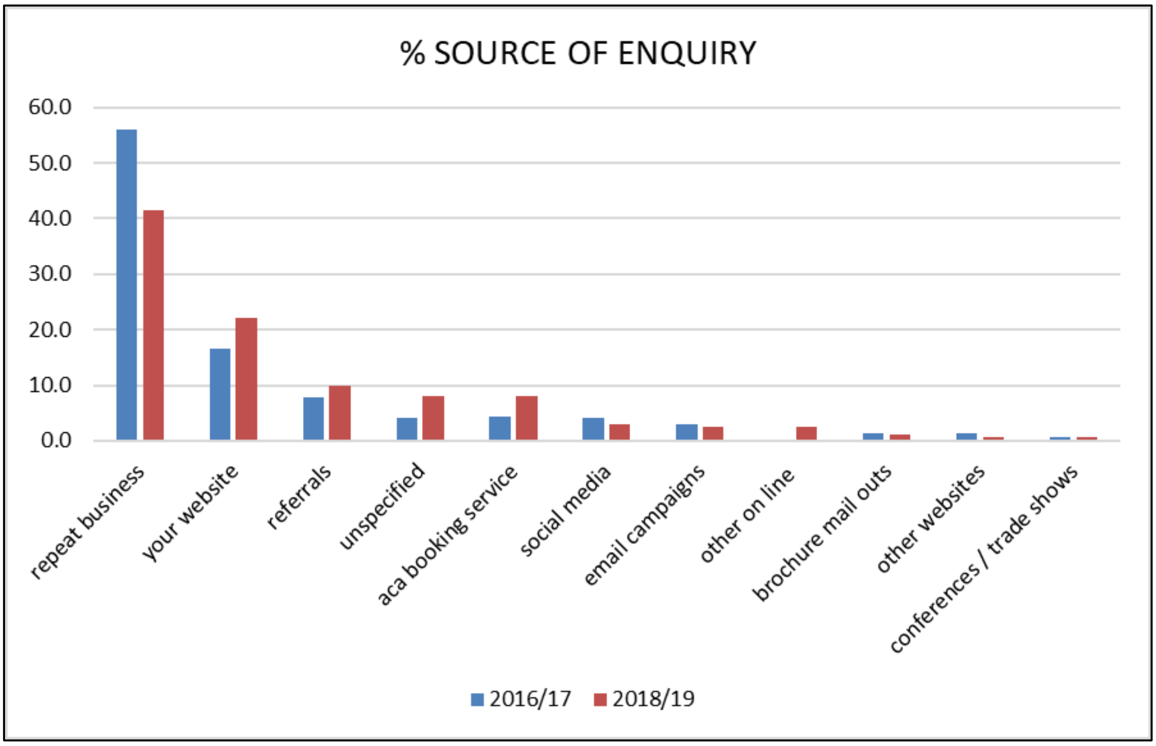
3.2 Enquiry source

28 responses (93%)

Enquiry source by ranking

Source	% of enquiries 2016/17	% enquiries 2018/19	difference
Repeat business	56.0 %	42.8%	-24%
Website	16.6%	22.6%	36%
Referrals	7.7%	8.4%	9%
ACA booking service	4.3%	8.2%	91%
Social media	4.2%	3.1%	-26%
Unspecified (eg cold calls)	4.1%	8.2%	102%
Email campaigns	3.0%	2.2%	-27%
Mail outs	1.4%	1.1%	-21%
Other websites	1.3%	0.8%	-42%
Conferences / trade shows	0.7%	0.7%	-3%
Other on line	0.3%	2.0%	567%





3.3 Actual bookings made

27 responses (87%)

Responses ranged from 17 to 560, with an average of 126.

3.4 Conversion rate

23 responses (75%)

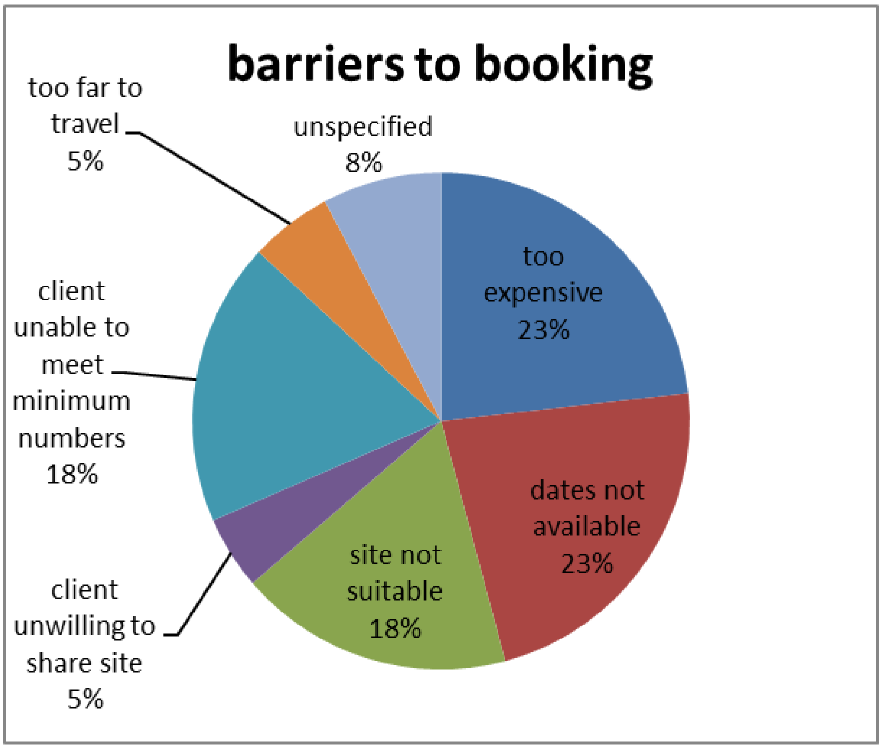
Responses ranged from 8% to 87%, with an average of 43%.

3.5 Reasons for not converting the enquiry into a booking

28 responses (93%)

Barriers by ranking

Rank	2016/18 Reason	2018/19 Reason
1	Dates not available	= Dates not available / too expensive
2	Site not suitable	= Site not suitable / client unable to meet minimum numbers
3	Too expensive	Unspecified
4	Client unable to meet minimum numbers	= Client unwilling to share site / too far to travel
5	= Unspecified / too far to travel	
6	Client unwilling to share site	



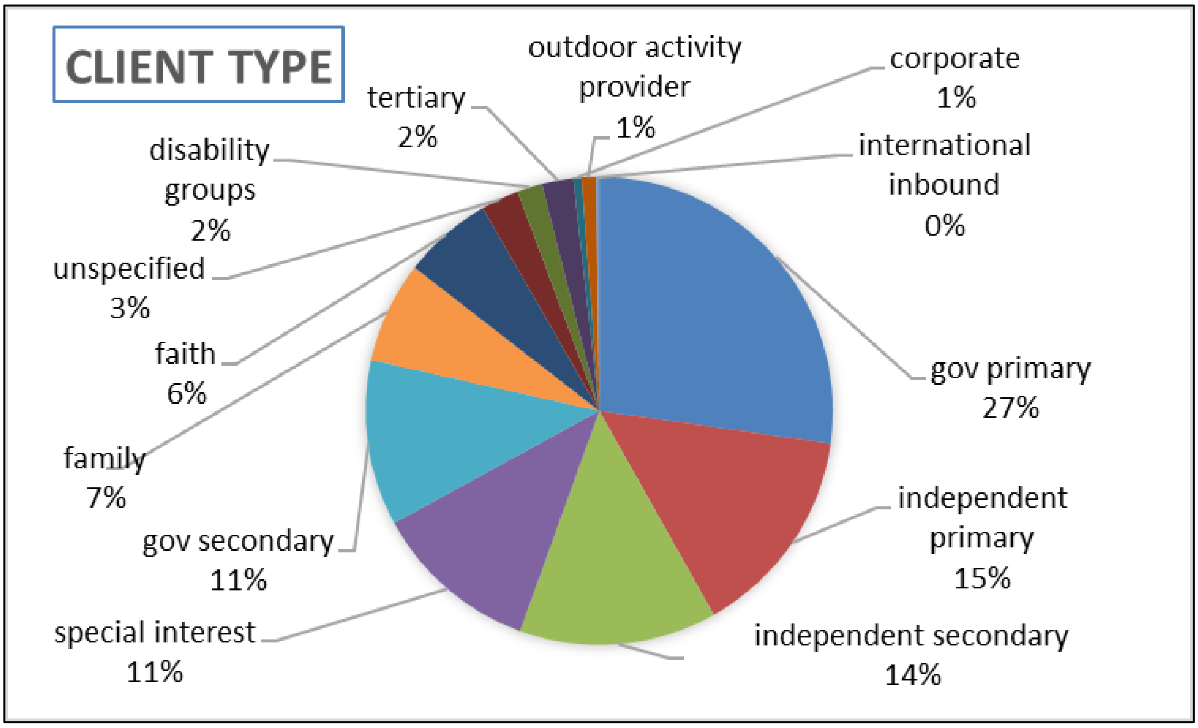
3.6 Client type

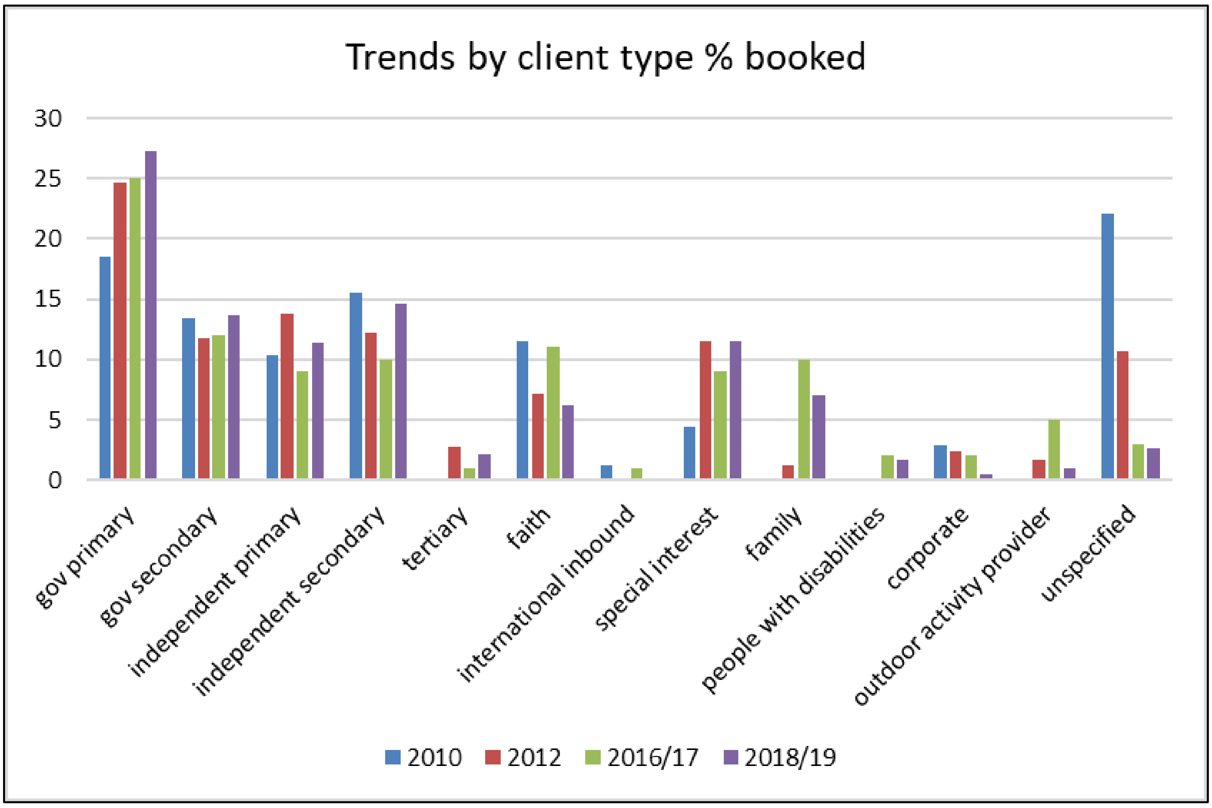
28 useable responses (93%).

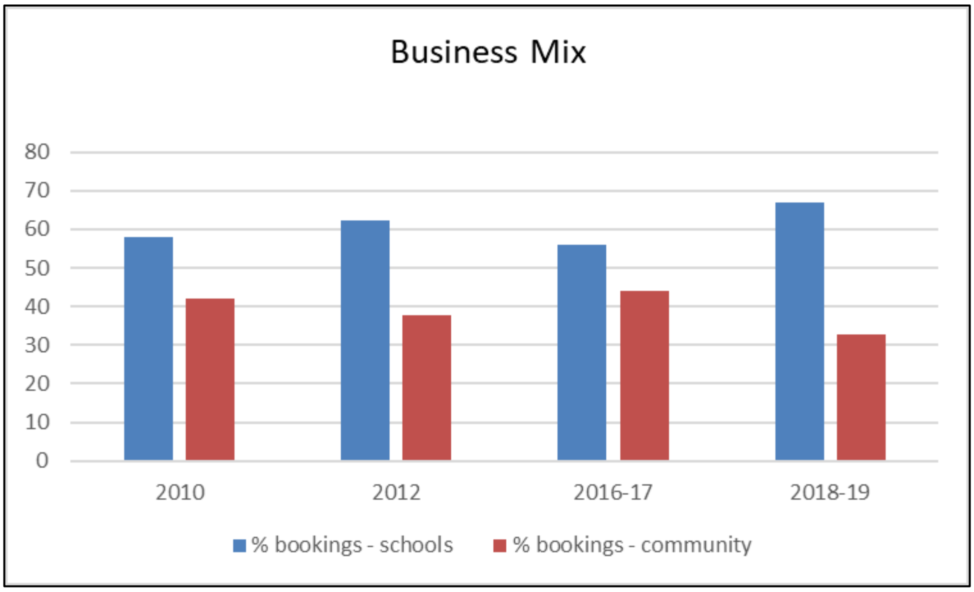
Note that not all sites are open to all user groups (some camps cater to schools only, some cater for community groups only, depending on their ownership and mission).

Client type by ranking

Rank	Client type 2016/17	Client type 2018/19
1	Government primary school	Government primary school
2	Government secondary school	Independent secondary
3	Faith	Government secondary school
4	Independent secondary	Special interest
5	Independent primary	Independent primary
6	Family	Family
7	Special interest	Faith
8	Outdoor activity provider	Unspecified
9	Unspecified	= People with disabilities / tertiary
10	People with disabilities	= Corporate / outdoor activity provider
11	Corporate	Inbound
12	Inbound international	
13	Tertiary	


CLIENT TYPE
outdoor activity provider 1%
corporate 1%
tertiary 2%
international inbound 0%
disability groups 2%
unspecified 3%
faith 6%
gov primary 27%
family 7%
independent primary 15%
gov secondary 11%
special interest 11%
independent secondary 14%


Trends by client type % booked
30
25
20
15
10
5
0
gov primary
gov secondary
independent primary
independent secondary
tertiary
faith
international inbound
special interest
family
people with disabilities
corporate
outdoor activity provider
unspecified
2010
2012
2016/17
2018/19



The bulk of business continues to be derived from the school sector (average of 61% since 2010), but the only area of sustained growth over that period has been in government primary schools (up from 19% to 27%). All other school types showed increases from the 2016-17 Report, however independent secondary schools grew since the last survey after declining in the previous two.

The Australian Bureau of Statistics (2019) provides the following figures:

- there were 3,948,811 students enrolled in 9,503 schools (up by 59 since 2017)
- two-thirds (65.7%) of students were enrolled in government schools, 19.5% in Catholic schools and 14.8% in independent schools

See Appendix 1 for further information on the school sector.

Pleasingly, the number of reported bookings that came from an unknown source continues to decline, which we hope is an indication that camp operators are now better informed about their businesses and are thus better able to target their marketing spend.

3.7 School group retention rate

28 responses (90%).

Responses ranged from 40% to 100%, with an average of 80%

3.8 Community group retention rate

28 responses (90%).

Responses ranged from 0% (a camp that works only with school groups) to 100% (a camp that works only with community groups), with an average of 29%. This is naturally lower than school retention as community group bookings are often one-offs (eg weddings, re-unions, etc).

3.9 Groups cancelling after making a booking.

27 responses (87%).

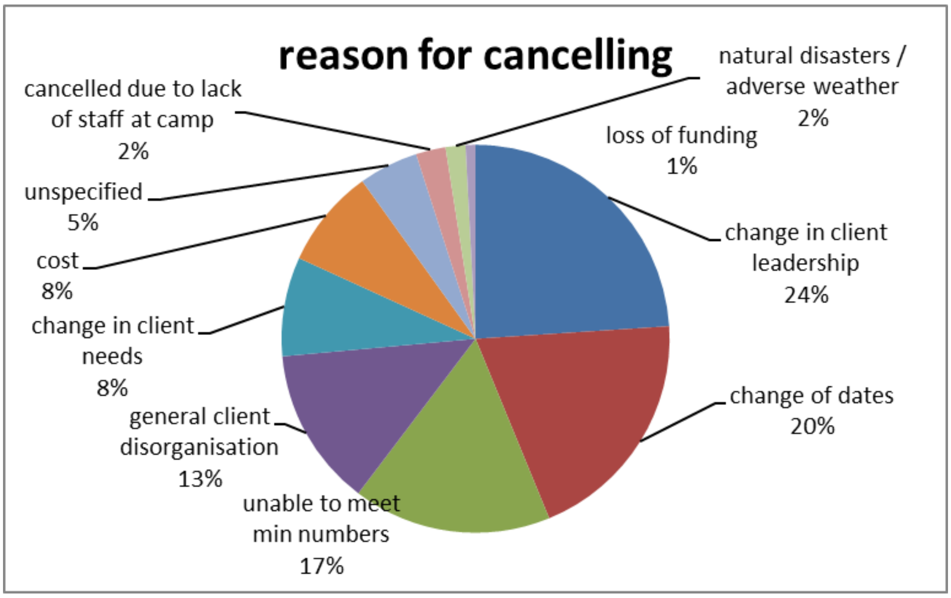
Responses ranged from 0% to 20%, with an average of 2%. This is consistent with the results reported in previous Surveys.

3.10 reasons for cancellation

26 responses (87%).

Cancellation reason by ranking

Rank	2016/17 Reason	2018/19 Reason
1	Unable to meet minimum numbers	Change in client leadership
2	General client disorganisation	Change of dates
3	= Change of dates / change in client leadership	Unable to meet minimum numbers
4	Change in client needs	General client disorganisation
5	Loss of funding	Change in client needs
6	Cost	cost
7	Adverse weather	Unspecified
8	Unspecified	= Cancelled by venue due to lack of staff at camp / adverse weather
9	Cancelled by venue due to lack of staff at camp	Loss of funding



Notes:

- Cost / lack of funding as a reason for cancelling has dropped from 17.9% (2012) of the total to 12% (2016-17) and now 9%.
- Client disorganisation (generally and unable to meet minimum numbers) has dropped from 62.1% (2012) to 41% (2016-17) to 30%.
- Change in client leadership is now the # 1 ranked cause of cancellations.

Section 4 Rates, charges and activities

Catering: 4.1, 4.2, 4.3 and 4.4

- 97% of respondents offer full catering.
- 77% of respondents offer a self-cater option.
- 22% of bookings request self-catering.
- 39% of respondents applied different charges for adult and child catering.

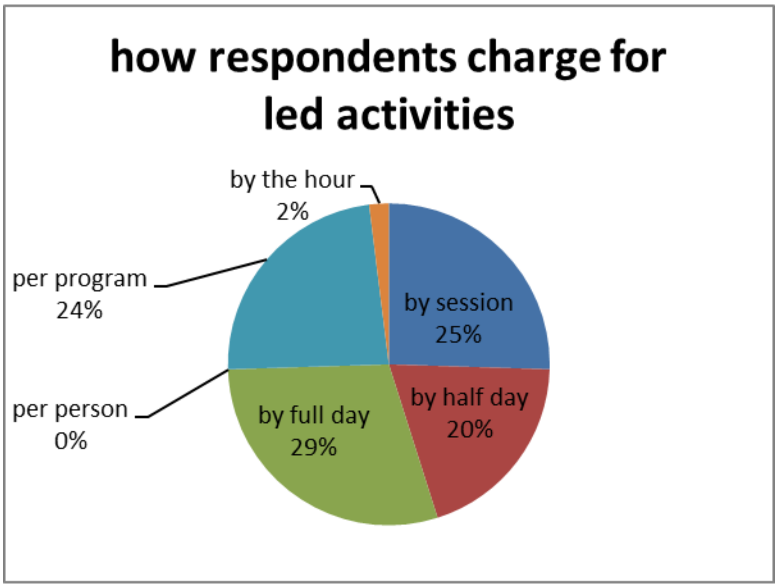
Charges: 4.5, 4.6 and 4.7

Item	Average charge (ex GST)
Full catering, adult rate, one bed night (three meals)	$74
Full catering, adult rate, two bed nights (three days, seven meals)	$156
Self-cater per single bed night	$48
Self-cater per weekend	$90
Camping on site	$20
Day visit	$17

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

- 93% of respondents offered led activities
- 61% of respondents offer a shared (combined camp staff and teacher / leader facilitated) program delivery model
- 42% of respondents offer a journey option (ie camping off site)
- 82% of respondents offer separately chargeable led activity support
- An average of 66% of clients request led activities

4.12

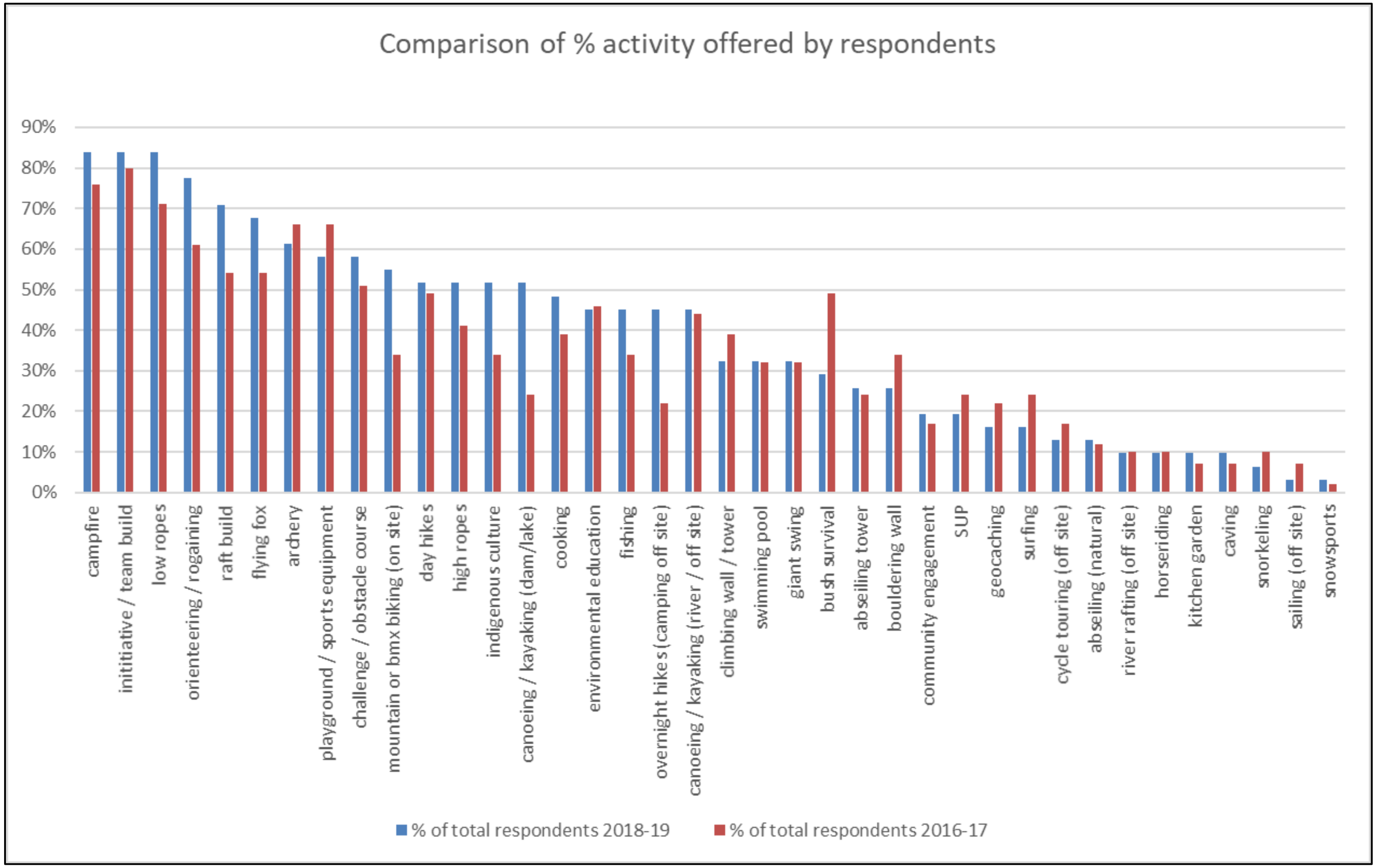


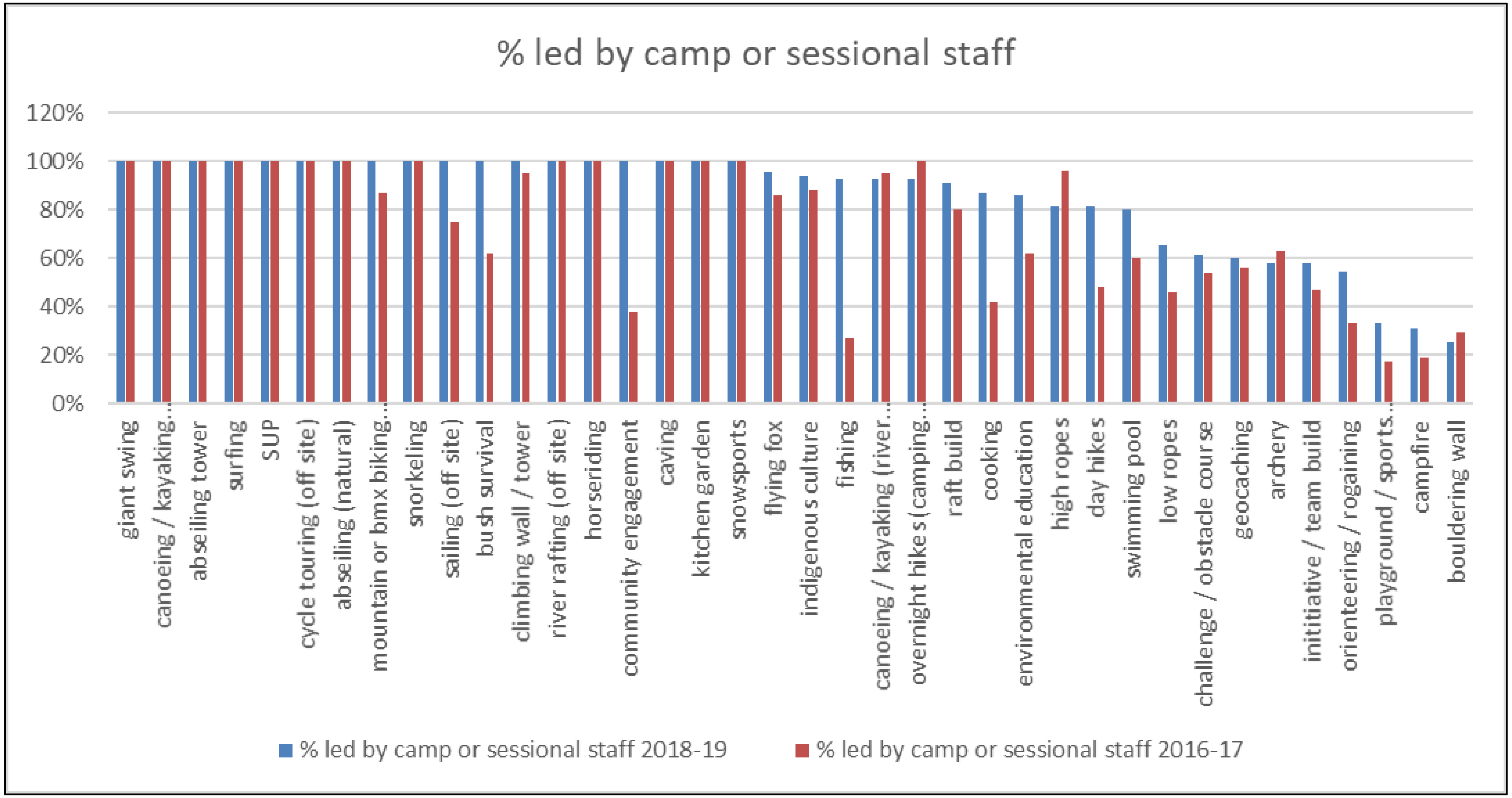
4.14 Activities on site

The number of activities on site ranged from zero (eg schools that run their own camp with basic facilities only) to 25, with the average being 15 (up from 14 in the 2016-17 Survey).

Activity by rank

campfire
inititiative / team build
low ropes
orienteering / rogaining
raft build
flying fox
archery
playground / sports equipment
challenge / obstacle course
mountain or bmx biking (on site)
day hikes
high ropes
indigenous culture
canoeing / kayaking (dam/lake)
cooking
environmental education
fishing
overnight hikes (camping off site)
canoeing / kayaking (river / off site)
climbing wall / tower
swimming pool
giant swing
bush survival
abseiling tower
bouldering wall
community engagement
SUP
geocaching
surfing
cycle touring (off site)
abseiling (natural)
river rafting (off site)
horseriding
kitchen garden
caving
snorkeling
sailing (off site)
snowsports


Comparison of % activity offered by respondents
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
campfire
inititiative / team build
low ropes
orienteering / rogaining
raft build
flying fox
archery
playground / sports equipment
challenge / obstacle course
mountain or bmx biking (on site)
day hikes
high ropes
indigenous culture
canoeing / kayaking (dam/lake)
cooking
environmental education
fishing
overnight hikes (camping off site)
canoeing / kayaking (river / off site)
climbing wall / tower
swimming pool
giant swing
bush survival
abseiling tower
bouldering wall
community engagement
SUP
geocaching
surfing
cycle touring (off site)
abseiling (natural)
river rafting (off site)
horseriding
kitchen garden
caving
snorkeling
sailing (off site)
snowsports
% of total respondents 2018-19
% of total respondents 2016-17



The general trend is for more activities to be led by camp or sessional staff, and less by teachers or self -led.

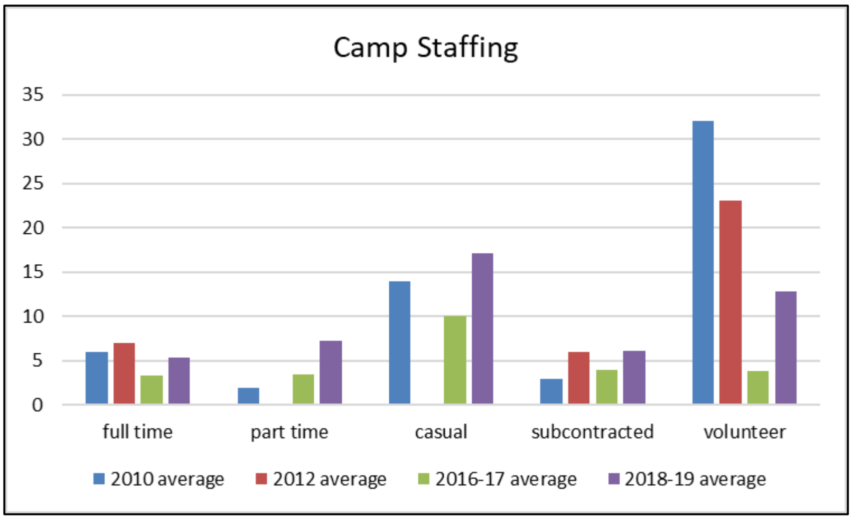
Part 5 - Employment

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.

31 responses (100%)

Staffing: 5.1, 5.4 and 5.5

Full time staff on payroll	27 respondents (45% of total) have full time staff
	Range: 1 – 19
	Average: 5
Part time staff on payroll	21 respondents (67% of total) have part time staff
	Range: 1 – 105
	Average: 7
Casual staff on payroll	27 respondents (87% of total) have casual staff
	Range: 3 – 54
	Average: 17
Volunteers assisting paid staff	14 respondents (45% of total) engage volunteers.
	Range: 1 – 70
	Average: 13
Sub contracted staff employed	17 respondents (55% of total) engage subcontractors.
	Range: 1 – 16
	Average: 6



Employment trends

The graph on the following page illustrates the following trends observed since the previous Survey:

1. An increase in full time employment,
2. An increase in part time / casual / subcontracted employment,
3. An increase in volunteer employment

Using the estimated total camps in Australia of 567, estimated total employment (not including volunteer staff) across all camps during the 2018/19 financial year is 19,845 positions (27,216 positions including volunteers).

	2018-19	2016-17	diff
Full time:	2,835 positions	2,335	+500
Part time:	3,969 positions	2,355	+1,614
Casual:	9,639 positions	8,478	+1,161
Subcontracted:	3,402 positions	1,884	+1,518
Volunteer:	7,371 positions	6,123	+1,248
Total	**27,216 positions**	**21,195**	**+ 6,021**

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

Full time	Range: 0 - 9
	Average: 1
Part time	Range: 0 - 78
	Average: 2
Casual	Range: 0 - 10
	Average: 3

These results are consistent with the employment figures recorded above – ie the highest staff turnover is in the part time / casual area (which has the highest employment figures).

5.6 How many local suppliers (within 30 minutes travel of your camp) did you purchase goods or services from during the 2018-2019 FY?

Range: 0 - 100

Average: 20

Note: **Question 5.3 "How many Full Time Equivalent (FTE) staff did you employ during the 2018-2019 FY?"** did not generate sufficient accurate responses for the result to be reported on here.

Section 6 - Financial information

Some respondents chose not to provide financial data and some respondents that were part of a larger commercial organisation were not able to / chose not to indicate allocation of some costs back to parent company.

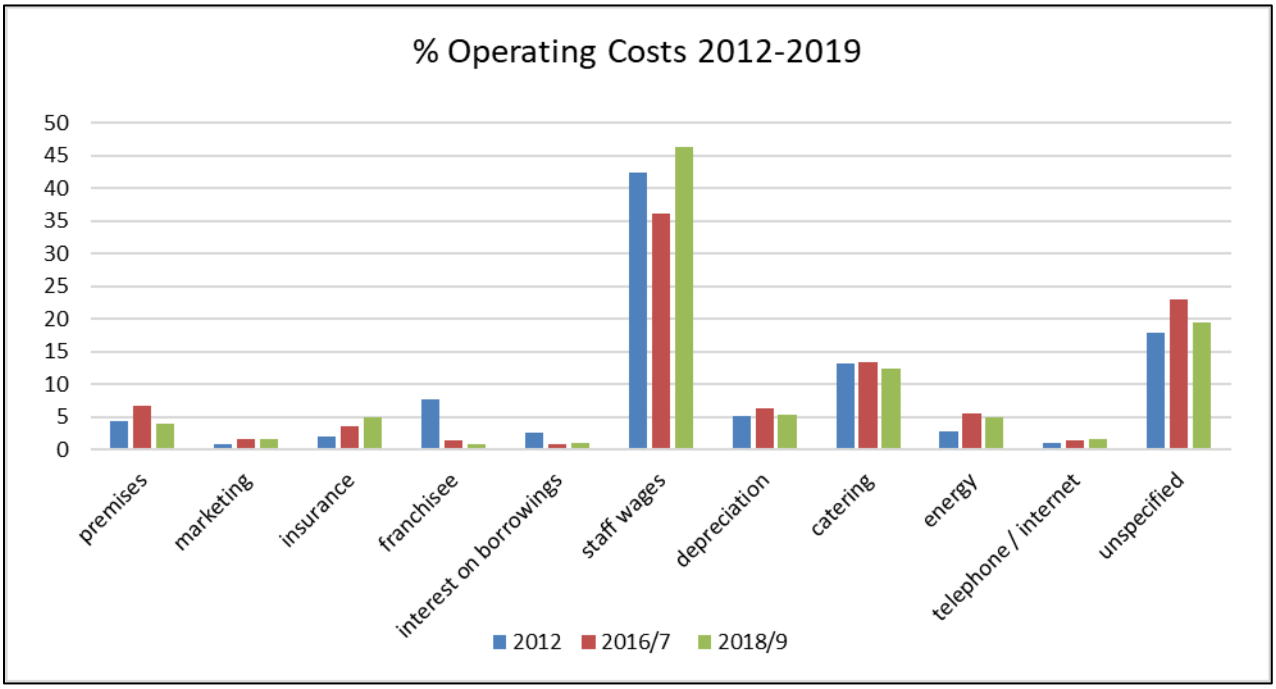
6.1 Turnover

27 responses (87%).

Responses ranged from $15,000 (school owned camp) to $12,000,000, with an average of $1,787,741. This would give an indicative total Australian camps sector turnover of $1.014B.

6.2 Operating expenditure

27 responses (87%).



Cost centre trends from 2012 to 2018/19

% operating expense item	2012	2016/7	2018/9	diff 2016/17 to 2018/19
premises	4.4	6.7	3.9	-41%
marketing	0.8	1.6	1.6	0%
insurance	2.1	3.7	5.1	37%
franchisee	7.7	1.4	1.0	-31%
interest on borrowings	2.6	0.8	1.1	42%
staff wages	42.3	36.1	46.3	28%
depreciation	5.1	6.4	5.4	-15%
catering	13.3	13.4	12.5	-7%
energy	2.9	5.5	5.0	-10%
telephone / internet	1	1.4	1.6	15%
unspecified	17.9	23	19.4	-16%

Comment

The biggest cost increases since the previous Survey are in interest on borrowings (up 42%), insurance (up 37%) and staff wages (up 28%).

Insurance costs continue to be an issue for our sector.

Conversely, the biggest cost decreases since the previous Survey are in premises (down 41%, franchisee (down 31%) and unspecified (down 16%).

6.3 Capital expenditure

20 responses (64%).

Responses ranged from $10,000 to $2M, with an average of $290,670.

This represents an increase of 27% over 2016/17 FY average capital expenditure ($228,187), itself a 26% increase on 2012 spend.

Appendix 1 - Schools, Australia, 2017 Report extract

Schools by Sector and Type 2010 to 2019

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Independent										
Primary only	248	234	235	228	222	215	214	216	216	211
Secondary only	73	68	58	57	53	53	48	51	48	54
Combined	641	653	657	661	669	680	688	693	703	713
Special	55	65	67	69	72	80	92	101	111	110
Total	1,017	1,020	1,017	1,015	1,016	1,028	1,042	1,061	1,078	1,088
Catholic										
Primary only	1,230	1,231	1,228	1,226	1,229	1,235	1,239	1,243	1,246	1,248
Secondary only	303	305	305	303	304	324	321	321	323	319
Combined	148	148	153	155	156	139	138	141	144	149
Special	27	26	27	33	33	39	40	39	40	40
Total	1,708	1,710	1,713	1,717	1,722	1,737	1,738	1,744	1,753	1,756

Government										
Primary only	4,879	4,847	4,827	4,802	4,799	4,774	4,780	4,769	4,778	4,786
Secondary only	1,034	1,023	1,029	1,025	1,022	1,032	1,035	1,036	1,043	1,043
Combined	498	504	511	505	500	504	490	502	494	497
Special	332	331	330	329	330	329	329	332	331	333
Total	6,743	6,705	6,697	6,661	6,651	6,639	6,634	6,639	6,646	6,659
All Sectors										
Primary only	6,357	6,312	6,290	6,256	6,250	6,224	6,233	6,228	6,240	6,245
Secondary only	1,410	1,396	1,392	1,385	1,379	1,409	1,404	1,408	1,414	1,416
Combined	1,287	1,305	1,321	1,321	1,325	1,323	1,316	1,336	1,341	1,359
Special	414	422	424	431	435	448	461	472	482	483
Total	9,468	9,435	9,427	9,393	9,389	9,404	9,414	9,444	9,477	9,503

Source: ABS Schools Australia 2009– 2018 (publication no. 4221.0, Table 35a)

FTE Enrolments by Sector 2015 to 2019

	FTE Enrolments			Enrolments - % in each Sector		
	Primary	Secondary	All Levels	Primary	Secondary	All Levels
2015						
Government	1,485,532	948,177	2,433,710	69.50%	59.20%	65.10%
Catholic	404,010	361,273	765,284	18.90%	22.50%	20.50%
Independent	247,068	292,781	539,849	11.60%	18.30%	14.40%
Total	2,136,611	1,602,231	3,738,842	100.00%	100.00%	100.00%
2016						
Government	1,520,008	952,657	2,472,665	69.90%	59.10%	65.30%
Catholic	404,869	361,952	766,820	18.60%	22.50%	20.30%
Independent	250,548	296,384	546,931	11.50%	18.40%	14.40%
Total	2,175,424	1,610,992	3,786,416	100.00%	100.00%	100.00%
2017						
Government	1,553,865	962,613	2,516,478	70.20%	59.20%	65.50%
Catholic	405,695	360,956	766,650	18.30%	22.2%	20.00%

Independent	254,988	302,134	557,121	11.50%	18.60%	14.50%
Total	2,214,547	1,625,703	3,840,249	100.00%	100.00%	100.00
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	71.0%	60.7%	66.6%
Catholic	404,228	365,263	769,491	18.0%	22.3%	19.8%
Independent	264,234	319,610	583,844	11.8%	19.5%	15.0%
Total	2,263,207	1,680,504	3,943,711	100.0%	100.0%	100.0%

Source: ABS Schools Australia 2019 – pivot tables (publication no. 4221.0, Table 43a)

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

- Keeping infrastructure up to an acceptable standard
- Successfully marketing and advertising our business with the right audience
- Capacity to grow – turning away multiple bookings. Need to expand to allow groups to utilise site.
- Increasing school and class sizes for repeat clients who are starting to outgrow our bed capacity and don't want to split year levels.
- Having dates available for new enquiries
- Growth / expansion of centres
- Advertising and marketing
- Managing groups in high fire danger zone with increasing threats and anxiety
- Continuous improvement of both the business and the industry
- Developing new programs that engage kids that haven't been done – curriculum based etc.
- Getting more accommodation ie camping dorm-style tents
- School cohorts exceeding camp capacity
- Ageing facilities.
- Engaging school group bookings

Increased external pressures

- Financial hardship on schools and families
- Public holidays
- Naplan
- School calendar changes
- Govt school teachers- union policy re out of hours work including camps
- Economic conditions and cost of bus transport
- Transport costs
- Social demographic financial challenges
- Changes to school curriculum
- Parents fears in regards to sending children to camp
- Socio-economic climate
- Unsubstantiated perceived risks of camping
- Increased cost of insurance
- Bushfires
- Parents / schools not realising the value of camping

Competition

- Increasing competition
- Pricing structure
- Competing with camp prices offered by non-accredited and NFP operators.

Staff

- Maintaining high quality level of staff and programs
- Staff retention

Regulation/compliance/risk management

- Compliance costs
- The amount of paperwork involved with school bookings and risk management x 3
- Bearing the costs of full AAS and Quality Tourism Framework compliance when others do not.
- Government regulation – all levels
- Compulsory accreditation.
- Increased school policies deterring staff from running camps

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	5	158	790	1%
New South Wales	134	165	22,110	30%
Northern Territory	7	81	564	1%
South Australia	45	91	4,095	6%
Queensland	108	119	12,888	18%
Victoria	189	123	23,263	32%
Tasmania	27	81	2,192	3%
Western Australia	57	122	6,954	10%
Total	**567**	**117**	**72,855**	

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