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"Professionalising training & mobility for Outdoor Animators in Europe bridging the gap between sector Competences & Learning Outcomes"

# Result 17
## European Research Report for the Outdoors


Lifelong Learning Programme

Education and Culture DG

The CLO2 project has been funded with support from the European Commission. This publication reflects the view only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.



*Please see the CLO2 project website at: www.clo-2.eu and the previous project at: www.eqfoa.eu*

# INDEX

# INDEX OF TABLES

# INDEX OF FIGURES

# 1. BACKGROUND

At the European level, the Outdoor sub-sector is a fast growing and developing activity area; as a consequence, employment needs are increasing rapidly and employers are seeking well trained professional employees, able to match the requirements of a more and more demanding clientele.
Unfortunately, up until today, there has been no formal connection, at European level, between the competences required by Outdoor employers and the learning outcomes acquired by the employees through training supplied by the main training providers, no matter how good this training may have been.

In other words, never have the European outdoor employers clearly defined as a group, the functions and competences they required, nor has a bridge ever been established between these requirements and the vocational and educational training provided by universities or other training bodies. This being said, the definition by the Outdoors of a "Competence Framework" for Outdoor animator is currently in construction under the current "EQFOA" project (www.eqfoa.eu) supported by the Leonardo da Vinci Programme (LdV). The main aim of the European project in the Outdoors was to bridge from the "Competence Framework" that has been finalised under the EQFOA project, to the skills and learning outcomes delivered by the training providers in the field.

In this regards, the objectives of the CLO2 project was to first establish the importance and level of the competences required by the employers in line with EQF, secondly develop the learning outcomes and match them with the competences required bringing them together in a Unit and Credit Framework, and finally set a methodology for accreditation and verification process together with an organised pilot to test all of the above developments.

The partnership was established in order to achieve the ambitious and crucial activities and has been selected for its particular competences in the fields addressed: Firstly a group of Outdoor employers' unions has analysed and fine-tuned the results of the EQFOA (Occupational map, Functional Map and Competence framework for Outdoor Animators) in order to present it to training providers on a logical and detailed way and secondly, two groups of training providers, for the first one establish the learning/knowledge outcomes to be acquired by future graduates in order to match the competences requested and for the second one to set a coherent methodology for quality assurance framework in the field in Europe. A third group has been constituted of the main European organisations. This group has helped and supported the consortium with both desk research and primary research on the one hand and also consultation, dissemination and coordination into the wider landscape of Sport and Active Leisure Sector on the other.

The tangible outcomes of this project were the description of the Learning Outcomes required to support the identified competences for Outdoor Animators, together with a methodology handbook and a formal accreditation process, whereas the intangible outcome is of course the transparency and effectiveness of the VET system in the Outdoor sub-sector, the recognition and mobility issues, for the benefit of all the stakeholders, namely the employers, the employees and the training providers.

 

In order to accurately map the outdoors sector at European level and to include full coverage of most areas of service, the CLO2 partnership identified the need to undertake a survey of outdoors employers within its project activities. For the value of the sector to be seen and understood by a range of stakeholders at EU level there is a need for accurate and up to date labour market information. In May 2010, EOSE and SkillsActive launched the CLO2 Employers Study. This programme of research aimed to review the composition of the outdoors workforce and explore the activities of organisations within the outdoors sub-sector in the following eleven European countries:

- Belgium
- Estonia
- Finland
- France
- Greece
- Hungary
- Ireland
- Lithuania
- Netherlands
- Portugal
- United Kingdom

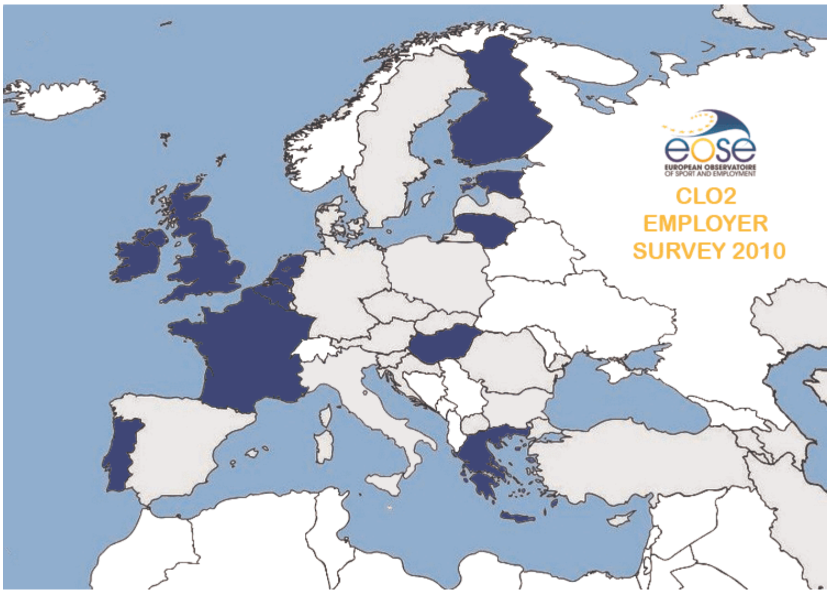


Figure 1: Map of CLO2 Member Countries (EU11)

It is normal to define sectors in terms of Standard Industrial Classifications (SIC codes), particularly for the purpose of drawing data from national statistics. However, the nature of the active leisure, learning and well-being industry makes it difficult to identify some key sub-industries using this methodology. This is particularly true in the light of the SIC code system's failure to respond to sector's needs.

In this regards, the main objectives of the CLO2 survey were to:

- Obtain some information about the type of organisations delivering outdoor activities
- Review the size and nature of the outdoors workforce;
- Categorise the type of employment e.g. full-time, seasonal, part-time, paid/unpaid, volunteers;
- Record the range of activities offered by the outdoors sub-sector;
- Explore the profile of participants;
- Gauge the number of participants who use their services each year;
- Measure the extent of seasonal operations;
- Assess the key challenges facing outdoor organisations;

The CLO2 research has been led by EOSE, the European Observatoire of Sport and Employment[1] in close cooperation with the Outdoors & Research Department of SkillsActive UK[2].

[1] See www.eose.org

# 2. APPROACH

In order to fully reflect the nature of the outdoors industry, the research work aimed to collect responses from organisations representing the full breadth of the outdoors offer. As highlighted within the Industry Occupational Map for the Outdoors[3] developed through the EQFOA[4] Leonardo project (2006-2008), there are five recognised sub-sectors within the outdoors industry, namely outdoor education, outdoor recreation, development training, explorations and expeditions and outdoors sports development. In addition to organisations known to be operating within these sub-sectors, the CLO2 research team recognised the need to also incorporate organisations offering outdoors activities as a secondary function or as a supplement to their core business.

Given the wide coverage of organisations and the nature of the objectives, it was decided by the CLO2 partnership that a quantitative online survey using SNAP survey software will be developed. The questionnaire was developed and unanimously agreed through the partnership and aimed to be concise, easy to fill and capturing the main information outlined above. The decision was taken early in the development of the survey to exclude lengthy areas of questioning such as skills gaps and skills shortages but to focus on questions to collect all basic information about the outdoors sector across a wide range of 11 European countries. A shorter questionnaire provided a valid initial study, whilst acknowledging the sector's aversion to unnecessary form filling. It aimed to provide a sound foundation for more detailed studies in the future. In order to ensure suitability and functionality, the questionnaire was designed by EOSE and the SkillsActive Outdoors Department and then reviewed and finalised by the CLO2 Partnership.

The following figure summarises the CLO2 Outdoor Survey Approach based on the findings from the 2008 EQFOA project.

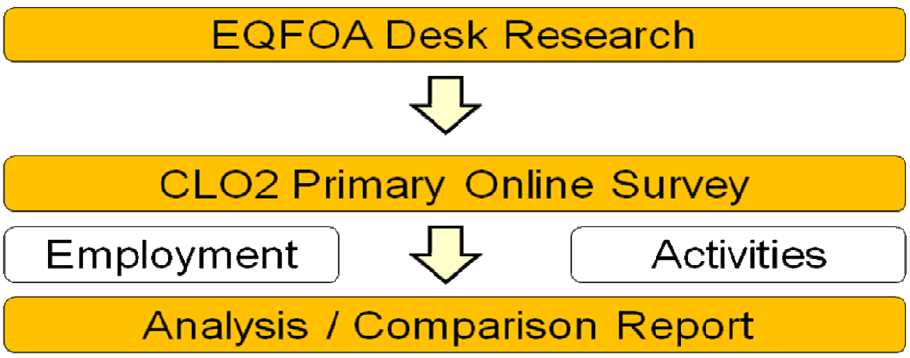


Figure 2: CLO2 Outdoor Survey Approach

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2 See www.skillsactive.com

3 See www.eqfoa.eu/fichiers/EQFOA_Industry_Occupational_Map_Outdoor(en).pdf

4 See www.eqfoa.eu

The survey was hosted online, on the SkillsActive website and was supported by an introductory web page and accompanying document (see annex1) which aimed to explain:

- What the CLO2 project is about;
- To which type of organisation the survey was relevant to/not relevant to;
- The main purpose of the survey.

The survey was targeted at sector organisations that offer a service to customers or participants relating to the outdoors. This included all forms of outdoor/adventurous recreation, education and development training delivery. This included commercial, public sector, charitable/not-for-profit and voluntary organisations, such as clubs. By “any organisation” we also included in the survey freelance instructors and sole traders. In order to support the chances to deliver a robust survey and obtain high rate of responses, it was agreed that each CLO2 national partner was responsible for searching, developing and providing the sample of organisations to be contacted by email through the online survey. It was requested that each national partner should develop that sample including organisation from the commercial, public and not for profit part of the Outdoors.

Following this step, an email invitation to participate in the research was sent to national organisations included within the samples provided by national partners (over 5.000 recipients) and a hyperlink and introductory information were made available to key partners to promote the survey via their own websites or other direct communication with potential respondents. In addition to directly inviting participants to undertake the survey, the partnership also worked with key organisations to promote the survey on national level.

The objective was to obtain the highest rate of responses so it was offered to each national partner the possibility to disseminate the survey invitation email by EOSE as neutral organisation or to manage that sending process on their own. For Belgium, Estonia, Greece, Hungary and Lithuania, this email was sent by EOSE. For Finland, France, Ireland, Netherlands and Portugal the survey messages were disseminated by national partners directly.

Furthermore, the survey has been promoted via a range of communication methods such as a press release sent to key media contacts (relevant outdoor and national governing body publications), promotion in magazines and e-zines in all ten countries.

Considering language barriers, the survey questionnaire and all accompanying documents such as the invitation to participate in the survey, the reminders, the FAQ have been translated into the following national languages:

- English (ENG)
- Portuguese (PT)
- French (FR)
- Greek (GRE)
- Estonian (EST)
- Hungarian (HU)
- Lithuanian (LT)
- Dutch (NL)

It is important to highlight that in order to collect comparable data in different countries it was necessary to keep exactly the same questions through the different translated versions of the questionnaire - even if in specific cases some terminologies do not apply directly to the country; We can take the example of “charitable” organisations that is only relevant for the UK.

A direct link to the survey was hosted on the CLO2 and EOSE homepages and we worked to get an introductory page and hyperlink to the survey hosted on as many partner websites as possible. A direct link was also put on the project website (www.clo-2.eu) to increase the chances to obtain some responses.

After a period of four weeks, it has been agreed by the CLO2 partnership to disseminate a gentle reminder to the full sample of Outdoor employers to encourage them to fill the questionnaire. As for the questionnaire, it was the decision of the national partner to manage that task or to ask EOSE to ensure it. This was really helpful and permitted the increase of the number of responses significantly.

The following figure summarises the CLO2 Outdoor Survey Working Steps:

| CLO2 Online Survey - Working Steps |
|---|
| Online Questionnaire Draft by EOSE & SkillsActive |
| Revision and agreement by all National Partners |
| Translation into national languages by all National Partners |
| Pre-Tests by National Partners and EOSE |
| Distribution based on National Partners’ contacts / channels provided |
| Three phases of Reminders plus Press Releases / Web publication |
| Analysis & Reporting |

Figure 3: CLO2 Outdoor Survey – Working Steps

Following the closing date of the survey, a data cleansing process was undertaken to prepare the data for analysis. This involved reviewing responses to remove duplicate responses and to remove any incomplete/illogical responses. The following figure shows the time line of the CLO2 Outdoors Online Survey.

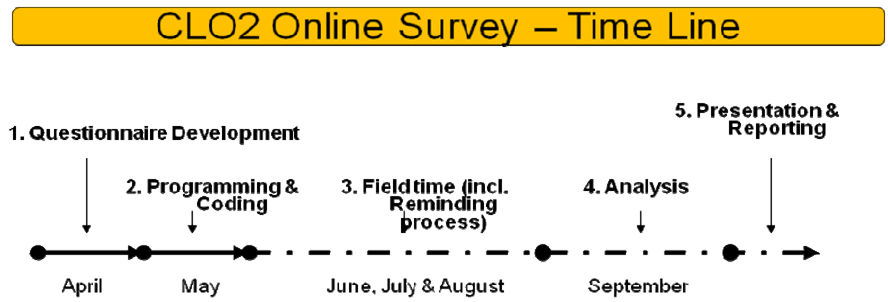



Figure 4: CLO2 Online Survey Time Line

Following this process, the base for analysis was 632 responding organisations with the following split per country and language:

| | Received | Language | Received | Language | **Total responses** |
|---|---|---|---|---|---|
| **Belgium** | 7 | FR | 26 | NL | **33** |
| **Estonia** | 26 | EST | 1 | EN | **27** |
| **Finland** | 20 | EN | 1 | HU | **21** |
| **France** | 80 | FR | 1 | PT | **81** |
| **Greece** | 27 | GRE | | | **27** |
| **Hungary** | 32 | HU | 2 | EN | **34** |
| **Ireland** | 20 | EN | | | **20** |
| **Lithuania** | 18 | LT | 1 | EN | **19** |
| **Netherlands** | 13 | NL | | | **13** |
| **Portugal** | 57 | PT | | | **57** |
| **UK** | 299 | EN | | | **299** |
| **Other** | 1 (Croatia) | EN | | | **1** |
| | | | | | **632 responses** |

Table 1: Replies split per country and language (EU11)

The number of responses per country is variable and largely dominated by the UK which represents 47.3% of the total number of responses obtained through the survey. Therefore, it is important to take into consideration that characteristic when going through the report and the analysis at the European level.

# 3. RESULTS BY COUNTRY

## 3.1. Belgium

### 3.1.1 General introduction[5]

From the responses received and the data collected through the CLO2 survey, this section gives a first picture of the outdoor sector in Belgium and more precisely on the key activities and services offered by outdoors organisations, the main participants for those activities, and the seasonal variations of both activities.

The questionnaire was sent to a sample of 203 addresses: 22.5 % French speaking and 77.5 % Dutch speaking, plus an unknown number of indirect contacts through Belgium outdoor networks. The sample, developed in December 2009, was composed of 67% commercial organisations, 14% non-for-profit, 5% public, 5% tour operators and 9% federations. In the commercial and non-for-profit organisations mostly multi-activity programmes are being offered. In the federations mostly kayak & canoeing, ballooning, snow sports, climbing & caving were represented.

It has to be noted that the results analysed and highlighted in this national section do not represent the situation in Belgium but have to be considered carefully as they are based on the responses received through the survey and only represent a limited number of organisations. But for the first time, this enables a picture of the sector to be built up at the national and then European level, which is essential to promote the sector's value both nationally and within the European Community. The following table provides an overview on general country data:

| | | |
|---|---|---|
| **Size of the country** | **30,528 km²** | Eurostat 2008 |
| **Total Population** | **10,666,866** | Eurostat 2008 |
| **Labour Force[6]** | **7,073,300** | Eurostat 2008 |
| **Active Population** | **4,848,500** | Eurostat Q1 2010 |
| **Employment Rate** | **61.6 %** | Eurostat 2009 |
| **GDP per capita in PPS[7]** | **116** | Eurostat 2009 |

Table 2: General country data (BE)

[5] Project partner from Belgium has been: Beroeps Federatie van Natuursport Ondernemingen – www.bfno.be and Katholieke Hogeschool Leuven – www.khleuven.be

[6] The labour force or the economically active population includes both employed and unemployed people, but not the economically inactive, such as pre-school children, school children, students and pensioners.

[7] Gross domestic product (GDP) is a measure for the economic activity. It is defined as the value of all goods and services produced less the value of any goods or services used in their creation. The volume index of GDP per capita in Purchasing Power Standards (PPS) is expressed in relation to the European Union (EU-27) average set to equal 100. If the index of a country is higher than 100, this country's level of GDP per head is higher than the EU average and vice versa. Basic figures are expressed in PPS, i.e. a common currency that eliminates the differences in price levels between countries allowing meaningful volume comparisons of GDP between countries. Please note that the index, calculated from PPS figures and expressed with respect to EU27 = 100, is intended for cross-country comparisons rather than for temporal comparisons.

### 3.1.2 Key data and facts for Belgium

**SURVEY KEY DATA AND FACTS:**

- From Belgium 33 outdoor organisations have participated in the EU outdoors survey (26 responded in Dutch and 7 in French language)
- The profile of organisations participating in this survey from Belgium were around 2/3 commercial / private organisations, 30.3% not-for-profit or voluntary organisations, and only 3% public organisations such as local authorities.
- Most of those outdoor organisations in Belgium have less than 50 permanent members of staff. Overall app 42% of the organisations was micro businesses (with one to ten permanent and seasonal employees).
- Around 75.3% of outdoor organisations in Belgium employ paid staff and around 42.3% have some volunteers; 15% of the organisations operated entirely on volunteers.
- Outdoor organisations from Belgium report a range from 40 participants/ members to an excess of 100.000 per year, whilst the Median is 1,250 and the arithmetic mean (average) is 6,415 participants (members).
- 63% of outdoor organisations deliver services to families.
- Around 54% of outdoor organisations deliver services to schools plus another 42.4% to children independent of school or family.
- One third of the Belgian outdoor organisations deliver services to adults only.
- The Belgian outdoors sector is subject to seasonal variation.
- The height of the outdoors season in Belgium is April to September.
- The least busy season in Belgium is November to March.
- Legislation and regulation issues (51.5%) and the access to the land/rivers/coast (45.5%) are mentioned as major challenges for the outdoors sector in Belgium.

### 3.1.3 Type of organisations

Organisations in Belgium include a mix of not-for-profit / voluntary organisations, commercial / private operators, or public organisations / local authorities, whilst replies in this survey were 2/3 from the for-profit sector:

- 66,7% are commercial organisations (private for profit)
- 30,3% are not for profit, or voluntary organisations
- 3 % are public organisations (local authority, school centre etc.)

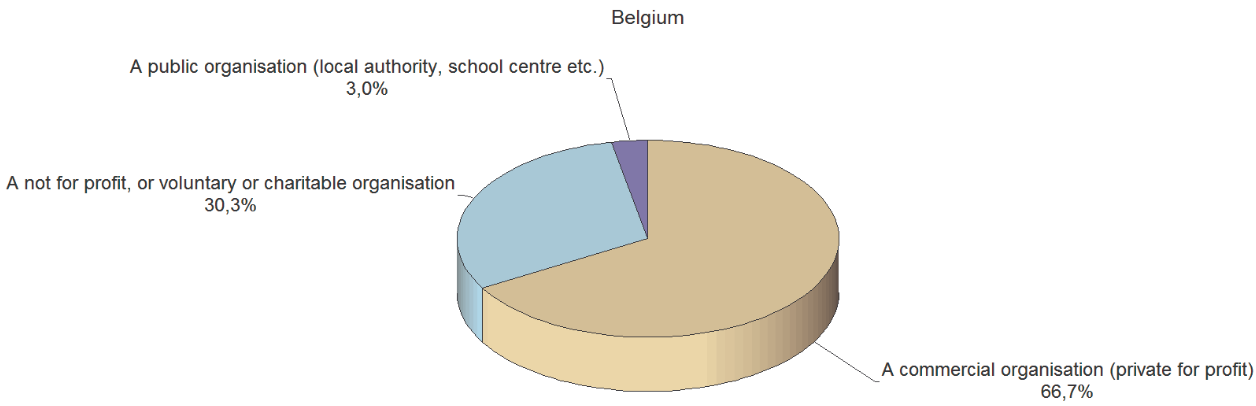



Figure 5: Organisation type (BE)

### 3.1.4 Type of employment and characteristics of the workforce (paid/unpaid)

Overall, 33 outdoors organisations completed the Outdoors Survey from Belgium. Nearly all (except one) of those outdoor organisations in Belgium have less than 50 permanent and seasonal members of staff. Overall app 42% of the organisations was micro businesses, employing between one and ten members of permanent and seasonal staff. Considering permanent staff only, 94% of the organisations would be rated as micro business.

Overall around 75.3% of organisations in Belgium identified that they currently employ paid staff and around 42.3% currently had volunteer staff. Further analysis reveals that 15% of organisations operated entirely on volunteers, 48% operated entirely on paid employees and app. nine per cent were sole practitioners. Overall, 27.3% of organisations had a mixture of paid staff and volunteers.

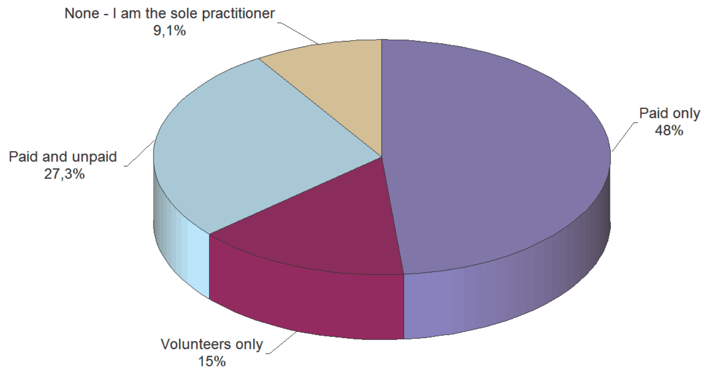



Figure 6: Employment type (BE)

The Belgian outdoor employers which filled the survey identified that they currently employ (incl. volunteers) around 1,049 people in total; 361 of members of paid staff. Overall, around one quarter of paid employees worked in a permanent position (96) and ¾ on seasonal basis (265). 135 were self employed/ freelancers and 553 were working on a voluntary basis.

### 3.1.5 The workforce: gender and age splits

The following two figures show the workforce situation split by gender and age:

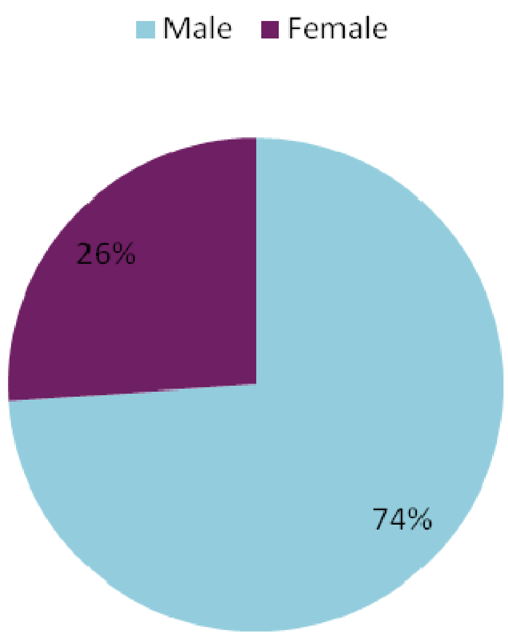



Figure 7: Workforce – gender split (BE)

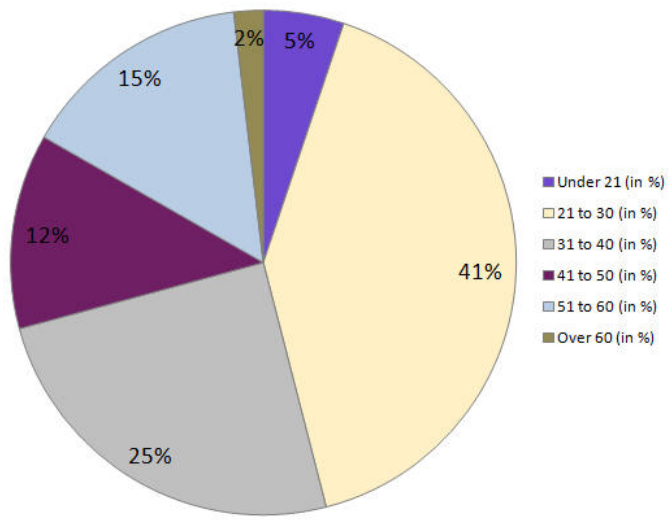



Figure 8: Workforce – age split (BE)

### 3.1.6 Type of employment split per type of organisation

The following figure indicates the employment type split by the type of organisations from which the replies were received:

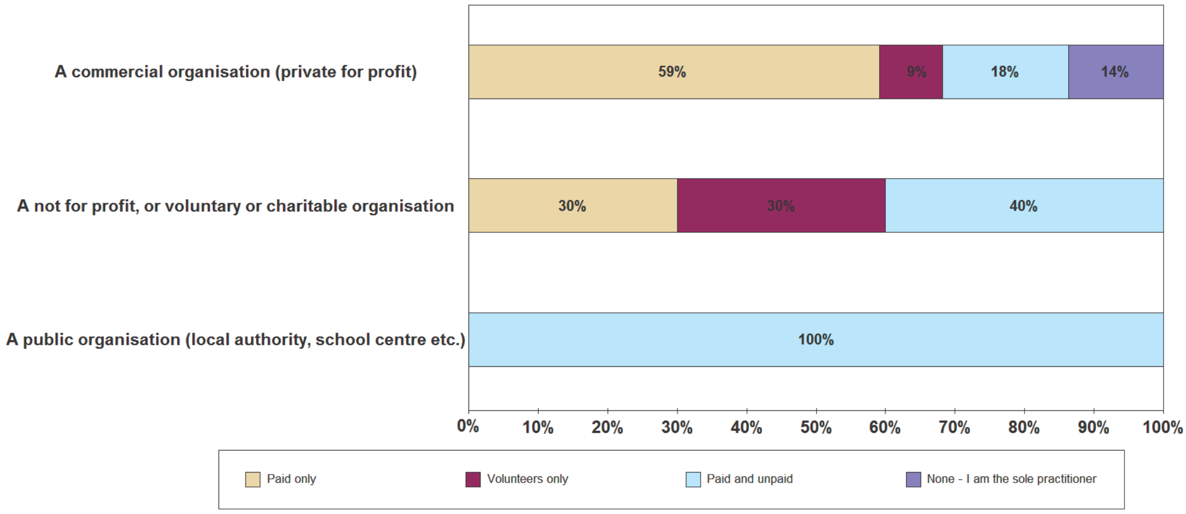



Figure 9: Employment type split per type of organisation in % (BE)

### 3.1.7 Outdoor organisation's offering

From the responses received, it seems that the most common service offered in Belgium is outdoor recreation (81,8% of organisations) followed by outdoor education (33,3%). The following figure provides an overview of all services offered by the Belgian organisations (multiple choices possible; no 'other services' added).

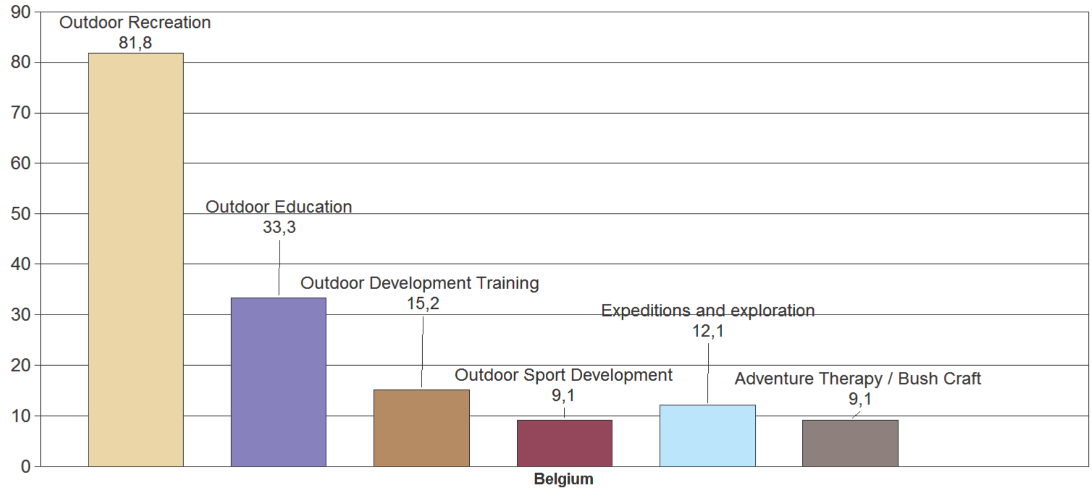



Figure 10: The outdoors service offer (BE)

### 3.1.8 Outdoor organisation's activities

The following tables highlight all activities offered by Belgian organisations in the different categories which are Air, Snow, Lakes & Sea, River and Earth. The results are split if delivered by own staff or by a sub-contractor (multiple choices possible):

**AIR**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 5 | 20,0% | 100,0% |
| Hot air balloon | 2 | - | 100,0% |
| Paragliding | 1 | - | 100,0% |
| Parapenting | 2 | 50,0% | 100,0% |
| Parachuting | - | - | - |
| ULM | - | - | - |

Table 3: Activities by outdoor service offer – AIR (BE)

**SNOW**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 29 | 75,9% | 24,1% |
| Skiing (Alpine) | 5 | 80,0% | 20,0% |
| Skiing (Cross Country) | 4 | 75,0% | 25,0% |
| Snow Boarding | 5 | 80,0% | 20,0% |
| Snow shoes trekking | 4 | 100,0% | - |
| Mountaineering | 4 | 100,0% | - |
| Snow mobile (motor) | - | - | - |
| Telemark skiing | - | - | - |
| Ski trekking | 1 | - | 100,0% |
| Kick sledding | 1 | - | 100,0% |
| Musher | 2 | - | 100,0% |
| Ice fishing | 1 | 100,0% | - |
| Ice skating | - | - | - |
| Sledging | 2 | 100,0% | - |
| Kite skiing | - | - | - |
| Ski joering (horse) | - | - | - |

Table 4: Activities by outdoor service offer – SNOW (BE)

**LAKES AND SEA**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 28 | 89,3% | 14,3% |
| Board surfing | 2 | 100,0% | - |
| Body board surfing | 2 | 100,0% | - |
| Canoeing / Kayaking / Sea Kayaking | 11 | 100,0% | 9,1% |
| Diving | 1 | 100,0% | - |
| Sailing | 2 | 50,0% | 50,0% |
| Water skiing/wake boarding | 1 | 100,0% | - |
| Wind surfing | 2 | 100,0% | - |
| Beach games | 5 | 80,0% | 20,0% |
| Buggy sailing | 1 | - | 100,0% |
| Fishing (Deep sea) | - | - | - |
| Parasailing | - | - | - |
| Jet ski | - | - | - |
| Kite surf | 1 | 100,0% | - |

Table 5: Activities by outdoor service offer –LAKES & SEA (BE)

**RIVER**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 53 | 77,4% | 26,4% |
| Rafting | 11 | 54,5% | 45,5% |
| Canoeing | 14 | 92,9% | 14,3% |
| Kayaking | 16 | 87,5% | 18,8% |
| Hydro speed | 1 | - | 100,0% |
| Rapid swimming | 5 | 60,0% | 40,0% |
| Fishing | 6 | 83,3% | 16,7% |

Table 6: Activities by outdoor service offer – RIVER (BE)

## EARTH

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 226 | 83,6% | 19,5% |
| Hiking / Hill walking | 16 | 100,0% | - |
| Nordic walk | 1 | 100,0% | - |
| Nature discovery | 8 | 100,0% | - |
| Orienteering | 16 | 93,8% | 6,3% |
| ATB biking | 16 | 100,0% | - |
| Cycling | 9 | 100,0% | - |
| Quad | 8 | 25,0% | 75,0% |
| Roller skating | 2 | 100,0% | - |
| 4x4 | 4 | - | 100,0% |
| Horse riding | 7 | 28,6% | 71,4% |
| Abseiling | 18 | 88,9% | 16,7% |
| Canyoning | 4 | 50,0% | 50,0% |
| Caving | 11 | 81,8% | 18,2% |
| High ropes parks | 25 | 88,0% | 20,0% |
| Rock climbing | 19 | 94,7% | 10,5% |
| Via Ferrata | 13 | 92,3% | 15,4% |
| Bungee jumping | 2 | 50,0% | 50,0% |
| Archery | 16 | 93,8% | 6,3% |
| Paint Ball | 11 | 45,5% | 54,5% |
| Shooting activities | 5 | 100,0% | - |
| Challenge courses | 15 | 86,7% | 26,7% |

Table 7: Activities by outdoor service offer – EARTH (BE)

Almost 42% of the organisations identified that they offer ‘other services/activities’:

- Teambuilding
- Mountain sports
- Canoe & kayak
- Outdoor training, adventure education, educational ropes course, teaching expeditions
- GPS hiking
- Teambuilding course
- City games
- Summer (sports)camps, voyages, school sport excursion, rental of holiday homes
- Orienteering, Mountain bike orienteering, competitions, practical training, initiation
- Tyrolean traverse
- Survival trek
- Back to basics wellness (sweat lodge sessions)
- Bohemian games (as a variation on Highland games)
- Holidays in Belgium and abroad

### 3.1.9 Outdoor organisation’s type of participants

The level of participation in all those activities (n=32) showed a significant variation, ranging from 40 participants/members to in excess of 100.000 per year, whilst the Median is 1.250 participants (members) and the arithmetic mean (average) is 6.415 participants (members).

The following figure shows the main participant groups (with multiple choices possible) in percent. Amongst those mentioned as main participant groups under ‘others’, mainly people with disabilities or mentally handicaps (autism) and youth groups were mentioned.

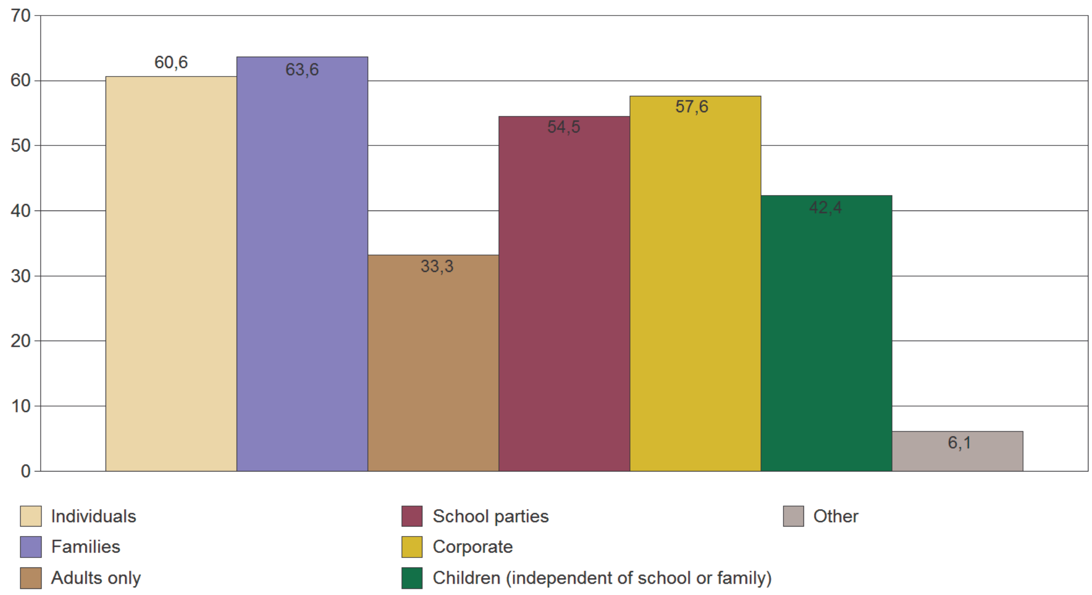



Figure 11: Main participants (BE)

### 3.1.10 Outdoor organisation’s seasonality

The figure below shows that from the responses received through the survey the outdoors industry in Belgium is subject to seasonal variation. Between 68,8% and 75% of responding organisations from Belgium identified the main high demand seasons from April to September, whilst peaks were experienced in June and September (75%). The winter months of November to February (reaching into March) appear to be the least busy ones for Belgian outdoors organisations. The most common months for closure were December and January.

| Analysis % Respondents | Total | High season | Low season | Closed - no activities offered |
|---|---|---|---|---|
| Base | 374 | 50,0% | 35,0% | 15,0% |
| January | 30 | 23,3% | 53,3% | 23,3% |
| February | 30 | 26,7% | 53,3% | 20,0% |
| March | 32 | 28,1% | 56,3% | 15,6% |
| April | 32 | 59,4% | 31,3% | 9,4% |
| May | 32 | 68,8% | 18,8% | 12,5% |
| June | 32 | 75,0% | 15,6% | 9,4% |
| July | 33 | 72,7% | 18,2% | 9,1% |
| August | 33 | 69,7% | 24,2% | 6,1% |
| September | 32 | 75,0% | 15,6% | 9,4% |
| October | 30 | 40,0% | 46,7% | 13,3% |
| November | 29 | 24,1% | 55,2% | 20,7% |
| December | 29 | 27,6% | 37,9% | 34,5% |

Table 8: Seasonal variation (BE)

### 3.1.11 Outdoor organisation's main challenges

In regards of key challenges facing outdoors organisations in Belgium more than half of the organisations participating highlighted current 'legislation and regulation' (51,5%) as first choice, closely followed by 'access to land/rivers/coast' (45,5%); whilst 'skills shortages and gaps' (6%) and 'lack of available business support' (9,1%) remain challenges to only a minor group of outdoor organisations. The only other challenge mentioned was the lack of recognition of the adventure sports training programmes.

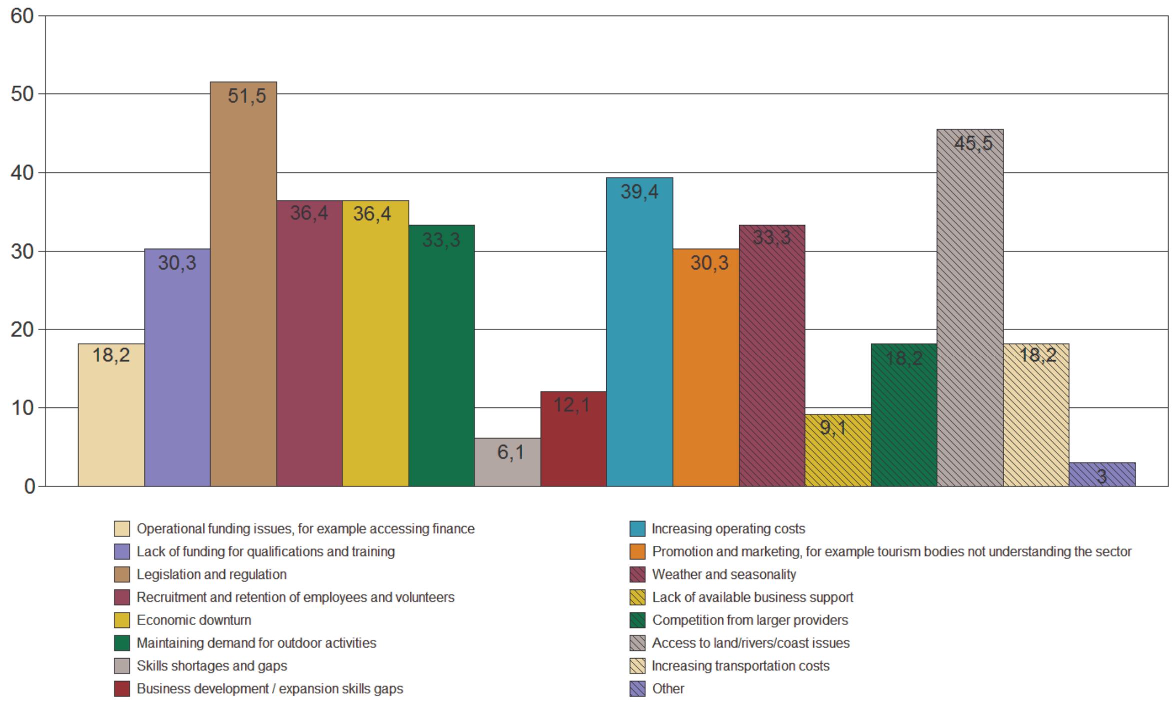



Figure 12: Main challenges facing organisation (BE)

## 3.2. Estonia

### 3.2.1 General introduction[8]

From the responses received and the data collected through the CLO2 survey, this section gives a first picture of the outdoor sector in Estonia and more precisely on the key activities and services offered by outdoors organisations, the main participants for those activities, and the seasonal variations of both activities.

The sample from Estonia has been developed from May till June 2009 and covers the private, public, not -for-profit and freelancer's sectors of the outdoors. The survey was sent to 590 contacts (a reminder e-mail was sent at the beginning of July 2010), plus an unknown number of indirect contacts through Estonian outdoor networks, covering outdoor activities or fields such as rural tourism, outdoor excursions/tours and hiking, water based, winter based, air based (including high ropes courses/activities), shooting (paintball, archery, bows etc), horseback riding and bicycling. Most of the organisations/companies/freelancers offer multi-activity programmes dependent on the season. In general approximately 65% of the contacts are commercial, 10 % are freelancers (sole entrepreneurs) and 25% are not for profit (membership to sports federations). It has to be noted that the results analysed and highlighted in this national section do not represent the situation in Estonia but have to be considered carefully as they are based on the responses received through the survey and only represent a limited number of organisations. But for the first time, this enables a picture of the sector to be built up at the national and then European level, which is essential to promote the sector’s value both nationally and within the European Community. The following table provides an overview on general country data:

| | | |
|---|---|---|
| **Size of the country** | **43,211 km²** | Eurostat 2008 |
| **Total Population** | **1,340,127** | Eurostat 2010 |
| **Labour Force[9]** | **907,400** | Eurostat 2008 |
| **Active Population** | **669,100** | Eurostat Q1 2010 |
| **Employment Rate** | **63.5 %** | Eurostat 2009 |
| **GDP per capita in PPS[10]** | **63** | Eurostat 2009 |

Table 9: General country data (EE)

[8] Project Partner from Estonia has been: Tallinn University - www.tlu.ee

[9] The labour force or the economically active population includes both employed and unemployed people, but not the economically inactive, such as pre-school children, school children, students and pensioners.

[10] Gross domestic product (GDP) is a measure for the economic activity. It is defined as the value of all goods and services produced less the value of any goods or services used in their creation. The volume index of GDP per capita in Purchasing Power Standards (PPS) is expressed in relation to the European Union (EU-27) average set to equal 100. If the index of a country is higher than 100, this country's level of GDP per head is higher than the EU average and vice versa. Basic figures are expressed in PPS, i.e. a common currency that eliminates the differences in price levels between countries allowing meaningful volume comparisons of GDP between countries. Please note that the index, calculated from PPS figures and expressed with respect to EU27 = 100, is intended for cross-country comparisons rather than for temporal comparisons.

### 3.2.2 Key data and facts for Estonia

**SURVEY KEY DATA AND FACTS:**

- From Estonia 27 outdoor organisations have participated in the EU outdoors survey (26 responded in Estonian and 1 in English language)
- The profile of organisations participating in this survey from Estonia was 85 % commercial / private organisations and only 15% not-for-profit, or voluntary or charitable organisation, whilst no public organisations such as local authorities have replied.
- All of those outdoor organisations in Estonia have less than 50 permanent members of staff. Overall app 3/4 of the organisations was micro businesses (with one to ten permanent and seasonal employees).
- Around 74% of outdoor organisations in Estonia employ paid staff and around 26% have some volunteers; only 4% of the organisations operated entirely on volunteers.
- Outdoor organisations from Estonia report a range from 60 participants/ members to an excess of 8,000 per year, whilst the Median is 1.000 and the arithmetic mean (average) is 2,560 participants (members).
- 77.8 % of outdoor organisations deliver services to families; 88,9% to corporate participants.
- Only 3.7% of outdoor organisations deliver services to schools plus another 22,2% to children independent of school or family.
- Only 3.7 % of the Estonian outdoor organisations deliver services to adults only.
- The Estonian outdoors sector is subject to seasonal variation.
- The height of the outdoors season in Estonia is June to August.
- The least busy season in Estonia is September to April.
- Funding issues (e.g. accessing finance) (66,7%) followed by the economic downturn (51,9%) and ‘business development / expansion skills gaps’ (48,1%) are mentioned as major challenges for the outdoors sector in Estonia.

### 3.2.3 Type of organisations

Organisations replied from in Estonia include a mix of not-for-profit / voluntary organisations, commercial / private operators, or public organisations / local authorities, whilst replies in this survey mostly were from the for-profit sector only:

- 85%  are commercial organisation (private for profit)
- 15% are not for profit, or voluntary or charitable organisation
- 0 % are public organisation (local authority, school centre etc.)

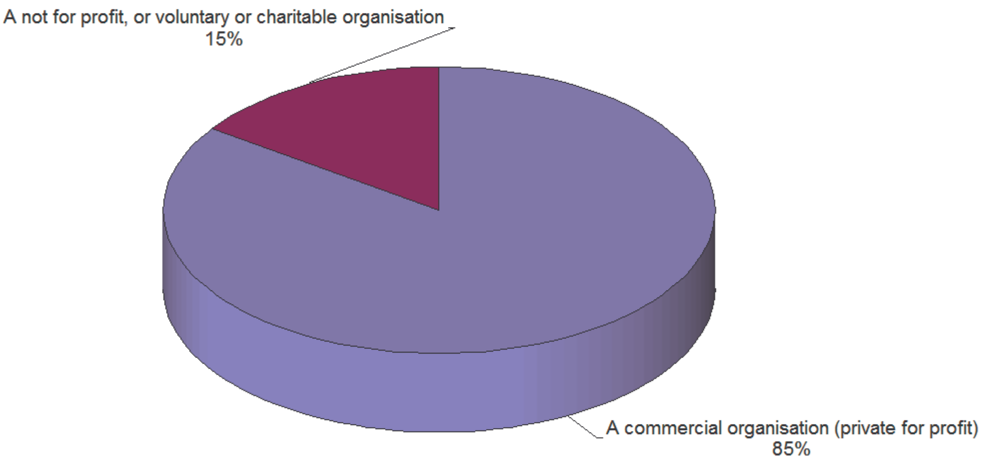



Figure 13: Organisation type (EE)

### 3.2.4 Type of employment and characteristics of the workforce (paid/unpaid)

Overall, 27 outdoors organisations completed the Outdoors Survey from Estonia. All of those outdoor organisations in Estonia, who have given numbers on staff (n=23) have less than 50 permanent and seasonal members of staff. Overall app 3/4 of the organisations was micro businesses, employing between one and ten members of permanent and seasonal staff. Considering permanent staff only, more than 91% of the organisations would be rated as micro business.

Overall around 74% of organisations in Estonia identified that they currently employ paid staff and around 26% currently had volunteer staff. Further analysis reveals that only 4% of organisations operated entirely on volunteers, 52% operated entirely on paid employees and app. 22 % were sole practitioners. Overall, 22,2% of organisations had a mixture of paid staff and volunteers.

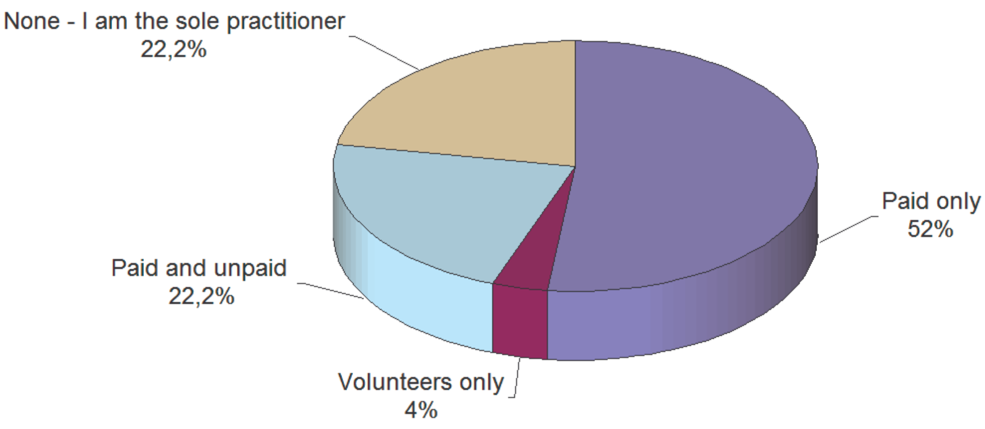



Figure 14: Employment type (EE)

### 3.2.5 The workforce: gender and age splits

The Estonian outdoor employers which filled the survey identified that they currently employ around 345 people in total (including volunteers); 215 of members of paid staff. Overall, less of the paid employees worked in a permanent position (92) than on seasonal basis (123). 41 were self employed/ freelancers and 89 were working on a voluntary basis. The following two figures show the workforce situation split by gender and age:

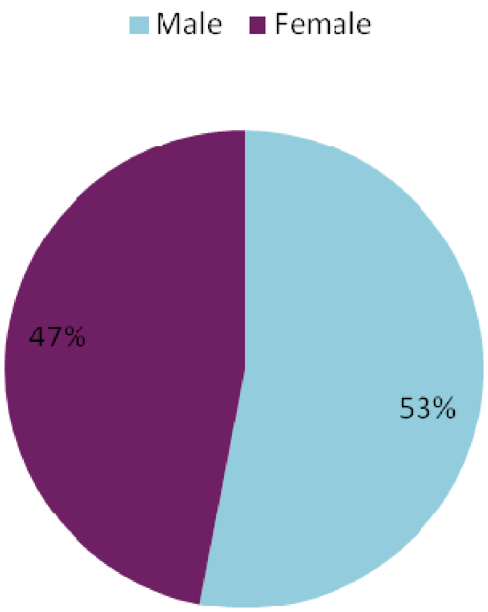



Figure 15: Workforce – gender split (EE)

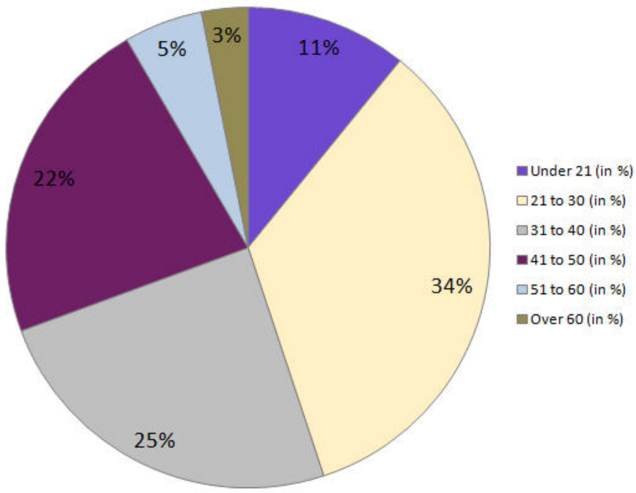



Figure 16: Workforce – age split (EE)

### 3.2.6 Type of employment split per type of organisation

The following figure indicates the employment type split by the type of organisations from which the replies were received:

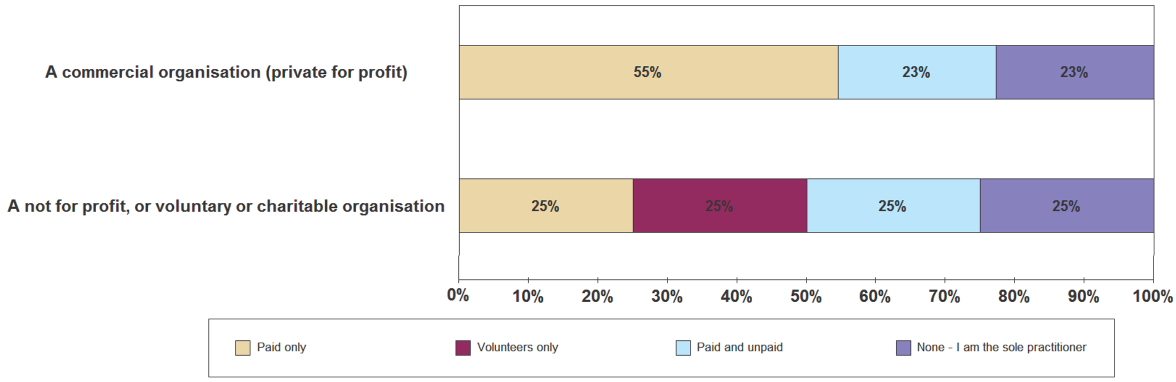



Figure 17: Employment type split per type of organisation in % (EE)

### 3.2.7 Outdoor organisation's offering

From the responses received, it seems that the most common service offered in Estonia is outdoor recreation (70.4% of organisations) followed by outdoor development training (33.3%). The following figure provides an overview of all services offered by the Estonian organisations (multiple choices possible). The category 'other' included services such as: fairy tale games, tours with introduction of local life and nature, motivational programmes, and bike trips and excursions.

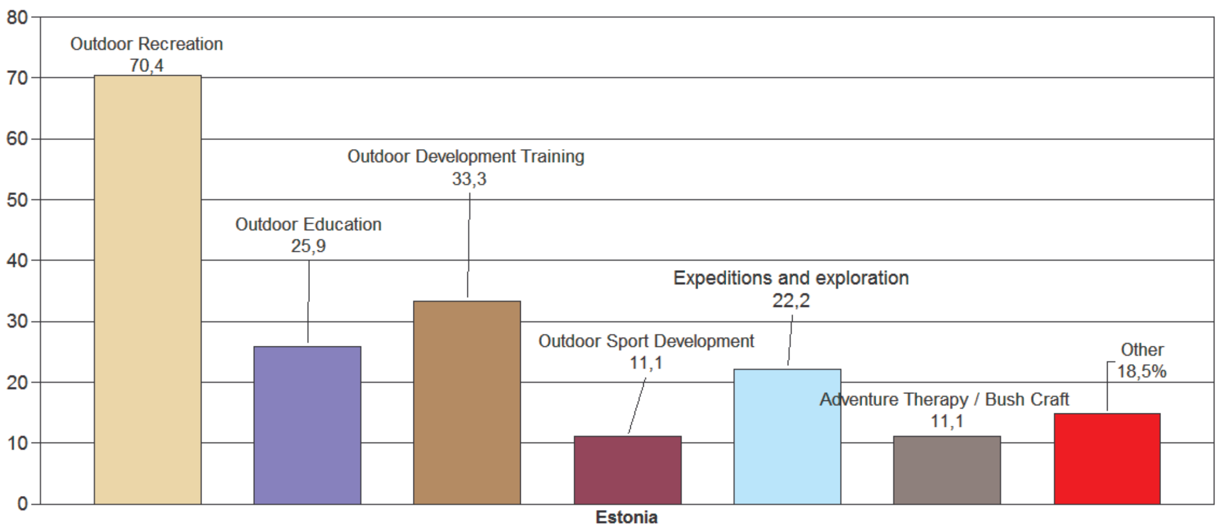



Figure 18: The outdoors service offer (EE)

### 3.2.8 Outdoor organisation's activities

The following tables highlight all activities offered by Estonian organisations in the different categories which are Air, Snow, Lakes & Sea, River and Earth. The results are split if delivered by own staff or by a sub-contractor (multiple choices possible):

**AIR**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 4 | - | 100,0% |
| Hot air balloon | 1 | - | 100,0% |
| Paragliding | - | - | - |
| Parapenting | - | - | - |
| Parachuting | 3 | - | 100,0% |
| ULM | - | - | - |

Table 10: Activities by outdoor service offer – AIR (EE)

**SNOW**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 39 | 69,2% | 41,0% |
| Skiing (Alpine) | 1 | - | 100,0% |
| Skiing (Cross Country) | 3 | 66,7% | 33,3% |
| Snow Boarding | 2 | - | 100,0% |
| Snow shoes trekking | 5 | 60,0% | 40,0% |
| Mountaineering | - | - | - |
| Snow mobile (motor) | 2 | 100,0% | 50,0% |
| Telemark skiing | - | - | - |
| Ski trekking | 6 | 83,3% | 16,7% |
| Kick sledding | 2 | 50,0% | 50,0% |
| Musher | 2 | 50,0% | 100,0% |
| Ice fishing | 3 | 100,0% | 33,3% |
| Ice skating | 2 | 100,0% | - |
| Sledging | 2 | 100,0% | - |
| Kite skiing | 1 | 100,0% | - |
| Ski joering (horse) | 8 | 62,5% | 50,0% |

Table 11: Activities by outdoor service offer – SNOW (EE)

**LAKES AND SEA**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 28 | 82,1% | 25,0% |
| Board surfing | 1 | 100,0% | - |
| Body board surfing | - | - | - |
| Canoeing / Kayaking / Sea Kayaking | 10 | 80,0% | 30,0% |
| Diving | 2 | 50,0% | 50,0% |
| Sailing | 3 | 66,7% | 33,3% |
| Water skiing/wake boarding | 1 | 100,0% | - |
| Wind surfing | 1 | 100,0% | - |
| Beach games | 1 | 100,0% | - |
| Buggy sailing | - | - | - |
| Fishing (Deep sea) | 7 | 100,0% | 14,3% |
| Parasailing | - | - | - |
| Jet ski | 2 | 50,0% | 50,0% |
| Kite surf | - | - | - |

Table 12: Activities by outdoor service offer –LAKES & SEA (EE)

**RIVER**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 34 | 79,4% | 23,5% |
| Rafting | 6 | 83,3% | 16,7% |
| Canoeing | 13 | 69,2% | 30,8% |
| Kayaking | 6 | 66,7% | 33,3% |
| Hydro speed | - | - | - |
| Rapid swimming | - | - | - |
| Fishing | 9 | 100,0% | 11,1% |

Table 13: Activities by outdoor service offer – RIVER (EE)

## EARTH

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 119 | 75,6% | 29,4% |
| Hiking / Hill walking | 20 | 85,0% | 20,0% |
| Nordic walk | 6 | 66,7% | 33,3% |
| Nature discovery | 7 | 85,7% | 28,6% |
| Orienteering | 12 | 83,3% | 25,0% |
| ATB biking | 7 | 85,7% | 14,3% |
| Cycling | 8 | 87,5% | 12,5% |
| Quad | 1 | 100,0% | 100,0% |
| Roller skating | 1 | 100,0% | - |
| 4x4 | 4 | 100,0% | 25,0% |
| Horse riding | 9 | 44,4% | 55,6% |
| Abseiling | 5 | 80,0% | 20,0% |
| Canyoning | 1 | 100,0% | 100,0% |
| Caving | 1 | 100,0% | - |
| High ropes parks | 9 | 66,7% | 33,3% |
| Rock climbing | 2 | 100,0% | - |
| Via Ferrata | - | - | - |
| Bungee jumping | - | - | - |
| Archery | 10 | 60,0% | 40,0% |
| Paint Ball | 6 | 16,7% | 83,3% |
| Shooting activities | 2 | 100,0% | - |
| Challenge courses | 8 | 87,5% | 12,5% |

Table 14: Activities by outdoor service offer – EARTH (EE)

Almost 56 % of the organisations identify that they offer ‘other services’ than mentioned above:

- Survival skills training program
- Skeet shooting/combined game shooting, photo hunt on nature trail (trekking/hiking and finding places shown on photos)
- Sailing trip on a fishing ship and visiting lake museum
- Canoe trips, rafting trips, trips on floating sauna, floating house rental (140 m2 with all conveniences), trips on water bicycle
- Bird watching, health promoting seminars related to nature with visits to specific locations, observations of and acquaintance with domestic animals, farmer's golf course, evening events with Indian traditions
- Hikes/nature tours
- Safari, adventure games on motorized vehicle, rafting trips, survival skills training programs, teambuilding trainings, Amtrak ATV safari, river boat trips, corporate summer events, nature tours in Norway and Lapland and Aland and Estonia
- Baggy rental ( on field track), water bicycle rental, boat rental
- Horseback riding camps

- Hunting (also photo hunt), military games and competitions, motocross training for beginners and amateurs, adventure game
- Snorkelling at western shores of Saaremaa
- Bicycling programs, tours, rental
- Sports games
- Fairy tale game
- Tours with introduction of local life and nature
- Motivational programs
- Bicycling trips and excursions

### 3.2.9 Outdoor organisation's type of participants

The level of participation in all those activities (n=23) showed a significant variation, ranging from 60 participants/ members to in excess of 8.000 per year, whilst the Median is 1,000 participants (members) and the arithmetic mean (average) is 2,560 participants (members).

The following figure shows the main participant groups (with multiple choices possible) in percent. Amongst those mentioned as main participant groups under 'other' were retired people, people with special needs and friendship groups.

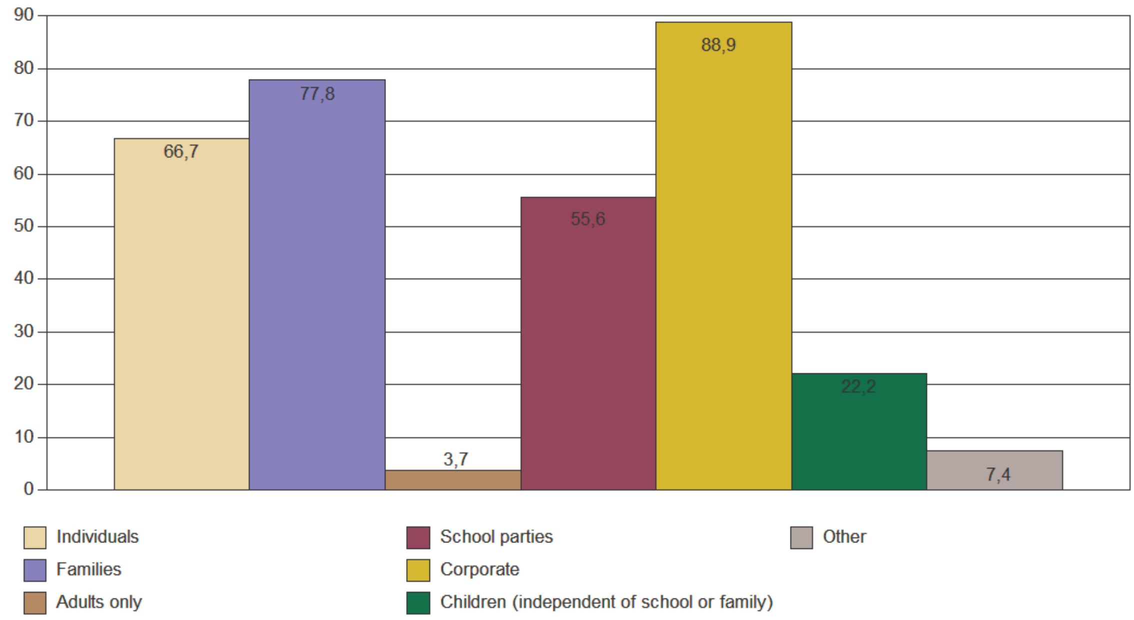



Figure 19: Main participants (EE)

### 3.2.10 Outdoor organisation's seasonality

The figure below shows that from the responses received through the survey the outdoors industry in Estonia is subject to seasonal variation. Between 92.3% and 96.3% of responding organisations from Estonia identified the main high demand seasons from June to August, whilst for some it starts already in May (63%). The months of September to April appear to be the least busy ones for Estonian outdoors organisations with peaks in October and November and again in March and April. The most common months for closure were December until March.

| Analysis % Respondents | Total | High season | Low season | Closed - no activities offered |
|---|---|---|---|---|
| Base | 309 | 45,0% | 44,7% | 10,4% |
| January | 25 | 20,0% | 60,0% | 20,0% |
| February | 26 | 34,6% | 42,3% | 23,1% |
| March | 25 | 12,0% | 68,0% | 20,0% |
| April | 24 | 20,8% | 70,8% | 8,3% |
| May | 27 | 63,0% | 37,0% | - |
| June | 26 | 92,3% | 7,7% | - |
| July | 27 | 96,3% | 3,7% | - |
| August | 27 | 96,3% | 3,7% | - |
| September | 26 | 38,5% | 61,5% | - |
| October | 25 | 16,0% | 76,0% | 8,0% |
| November | 26 | 3,8% | 76,9% | 19,2% |
| December | 25 | 36,0% | 36,0% | 28,0% |

Table 15: Seasonal variation (EE)

### 3.2.11 Outdoor organisation's main challenges

In regards of key challenges facing outdoors organisations in Estonia about 2/3 of the organisations participating highlighted current 'operational funding issues (e.g. accessing finance)' (66.7%) as first choice, followed by the 'economic downturn' (51.9%) and 'business development / expansion skills gaps' (48.1%); whilst skills shortage gaps (11.1%) and competition from larger providers (11.1%) remain challenges to only a minor group of outdoor organisations.

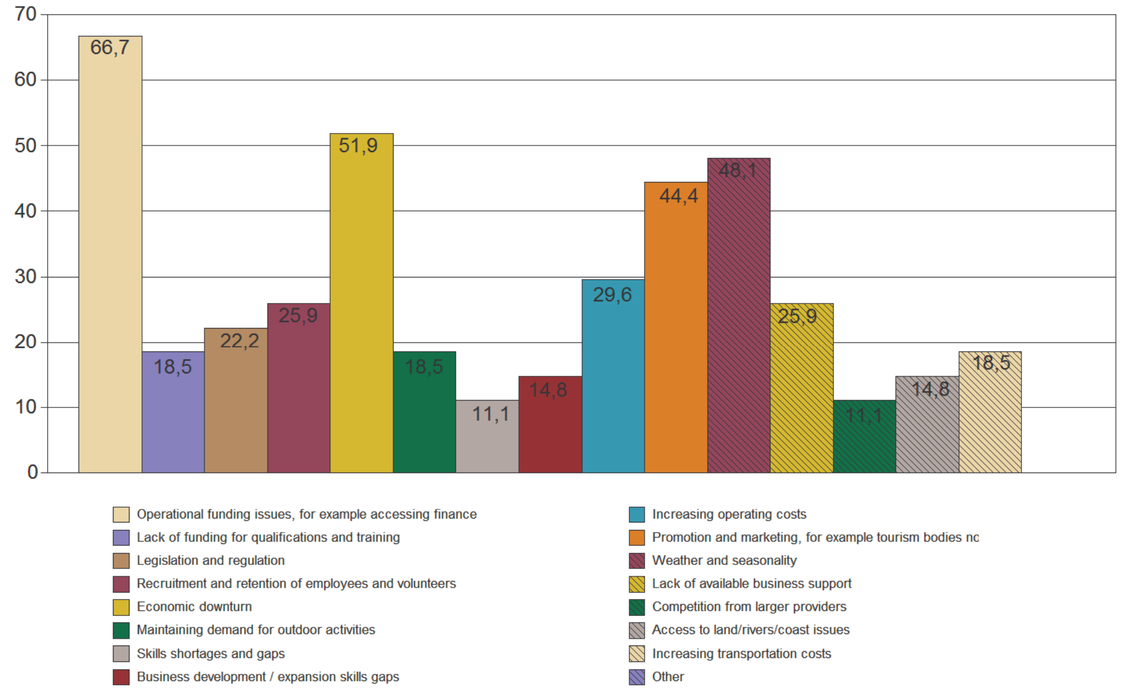



Figure 20: Main challenges facing organisation (EE)

# 3.3. Finland

### 3.3.1 General introduction[11]

From the responses received and the data collected through the CLO2 survey, this section gives a first picture of the outdoor sector in Finland and more precisely on the key activities and services offered by outdoors organisations, the main participants for those activities, and the seasonal variations of both activities.

The questionnaire was sent to a sample of 280 addresses, plus an unknown number of indirect contacts through Finnish outdoor networks. The sample was composed of 72% commercial organisations, 18% non-for-profit and 10% public. In commercial organisations (72%) mostly multi-activity and activity specific programs are being offered. Network contacts (28%) included federations, national governing bodies, trade associations and membership institutions in which mostly kayak & canoeing, climbing, snow sports and team-building activities are represented.

It has to be noted that the results analysed and highlighted in this national section do not represent the situation in Finland but have to be considered carefully as they are based on the responses received through the survey and only represent a limited number of organisations. But for the first time, this enables a picture of the sector to be built up at the national and then European level, which is essential to promote the sector's value both nationally and within the European Community. The following table provides an overview on general country data:

| | | |
|---|---|---|
| **Size of the country** | **304,529 $km^2$** | Eurostat 2008 |
| **Total Population** | **5,351,427** | Eurostat 2010 |
| **Labour Force[12]** | **3,513,800** | Eurostat 2008 |
| **Active Population** | **2,593,400** | Eurostat Q1 2010 |
| **Employment Rate** | **68.7 %** | Eurostat 2009 |
| **GDP per capita in PPS[13]** | **111** | Eurostat 2009 |

Table 16: General country data (FI)

[11] Project partner from Finland has been: Sport Institute of Finland – www.vierumaki.fi and Haaga-Helia University of Applied Sciences - www.haaga-helia.fi

[12] The labour force or the economically active population includes both employed and unemployed people, but not the economically inactive, such as pre-school children, school children, students and pensioners.

[13] Gross domestic product (GDP) is a measure for the economic activity. It is defined as the value of all goods and services produced less the value of any goods or services used in their creation. The volume index of GDP per capita in Purchasing Power Standards (PPS) is expressed in relation to the European Union (EU-27) average set to equal 100. If the index of a country is higher than 100, this country's level of GDP per head is higher than the EU average and vice versa. Basic figures are expressed in PPS, i.e. a common currency that eliminates the differences in price levels between countries allowing meaningful volume comparisons of GDP between countries. Please note that the index, calculated from PPS figures and expressed with respect to EU27 = 100, is intended for cross-country comparisons rather than for temporal comparisons.

### 3.3.2 Key data and facts for Finland

**SURVEY KEY DATA AND FACTS:**

- From Finland 21 outdoor organisations have participated in the EU outdoors survey (20 responded in English and 1 in Hungarian language)
- The profile of organisations participating in this survey from Finland were around 2/3 commercial / private organisations, 29% not-for-profit, or voluntary or charitable organisation and only 9.5% public organisations such as local authorities.
- Most of those outdoor organisations in Finland have less than 50 permanent members of staff. Overall app 80% of the organisations was micro businesses (with one to ten permanent and seasonal employees).
- Around 75% of outdoor organisations from Finland employ paid staff and around 55% have some volunteers; 25% of the organisations operated entirely on volunteers.
- Outdoor organisations from Finland report a range from 150 participants/ members to an excess of 140.000 per year, whilst the Median is 875 and the arithmetic mean (average) is 12.053 participants (members).
- 54% of outdoor organisations deliver services to families, 90% to individuals
- Around 20% of outdoor organisations deliver services to schools plus another 20% to children independent of school or family.
- One fourth of the Finnish outdoor organisations deliver services to adults only.
- The Finnish outdoors sector is subject to some seasonal variation.
- The height of the outdoors season in Finland is July and August.
- The least busy season in Finland is October and November. Geographical differences in Finland are important and so in the Southern part of Finland outdoor organisation's seasonality may differ significantly from those located in the Northern part of Finland. The results have to be taken into consideration carefully has they might be influenced by the location of the respondents.

### 3.3.3 Type of organisations

Organisations in Finland include a mix of not-for-profit / voluntary organisations, commercial / private operators, or public organisations / local authorities, whilst replies in this survey were 2/3 from the for-profit sector:

- 62% are commercial organisation (private for profit)
- 29% are not for profit, or voluntary or charitable organisation
- 9.5% are public organisation (local authority, school centre etc.)

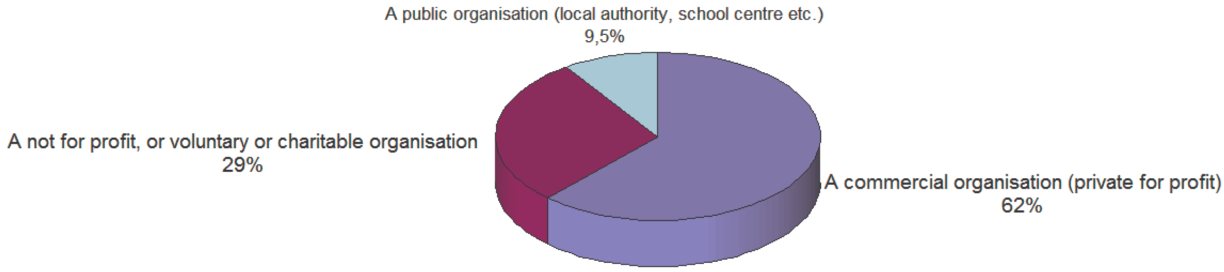



Figure 21: Organisation type (FI)

### 3.3.4 Type of employment and characteristics of the workforce (paid/unpaid)

Overall, 21 outdoors organisations completed the Outdoors Survey from Finland. Nearly all (except two) of those outdoor organisations replied from Finland (n=20) have less than 50 permanent and seasonal members of staff. Overall app 80% of the organisations was micro businesses, employing between one and ten members of permanent and seasonal staff. Considering permanent staff only, 85% of the organisations would be rated as micro business.

Overall around 75% of organisations in Finland identified that they currently employ paid staff and around 55% currently had volunteer staff. Further analysis reveals that 25% of organisations operated entirely on volunteers, 45% operated entirely on paid employees. No answer was received from any sole practitioners. Overall, 30% of organisations had a mixture of paid staff and volunteers.

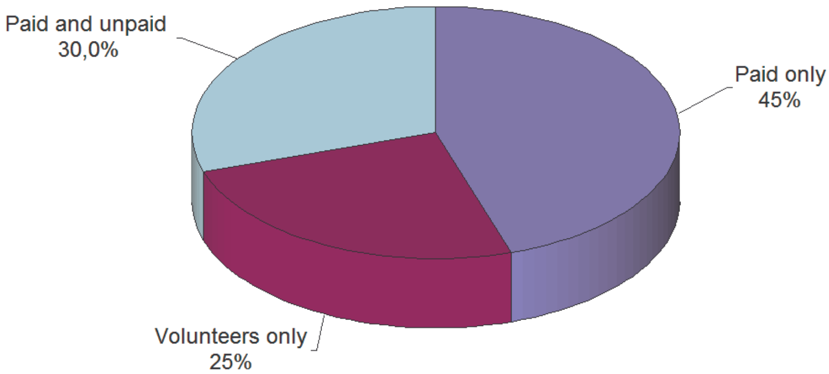



Figure 22: Employment type (FI)

The Finnish outdoor employers which filled the survey identified that they currently employ around 592 people in total (incl. volunteers); 346 of members of paid staff. Overall, 124 paid employees worked in a permanent position and 222 on a seasonal basis. 52 were self employed/ freelancers and 194 were working on a voluntary basis.

### 3.3.5 The workforce: gender and age splits

The following two figures show the workforce situation split by gender and age:

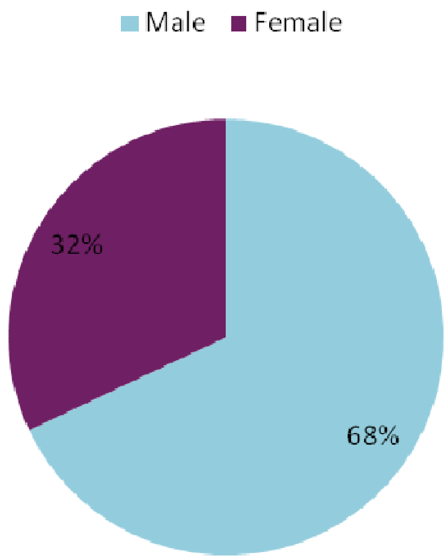



Figure 23: Workforce – gender split (FI)

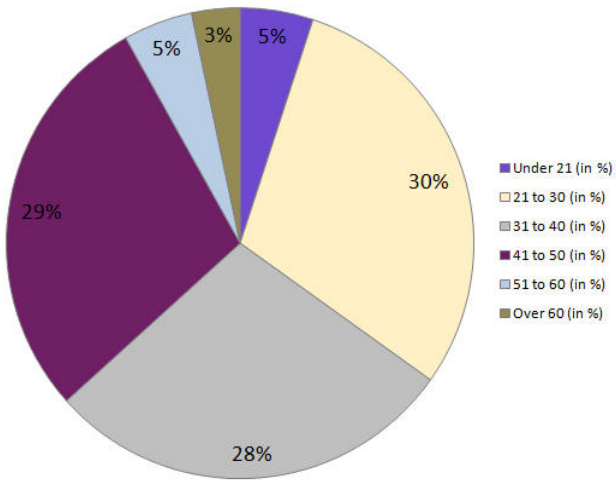



Figure 24: Workforce – age split (FI)

### 3.3.6 Type of employment split per type of organisation

The following figure indicates the employment type split by the type of organisations from which the replies were received:

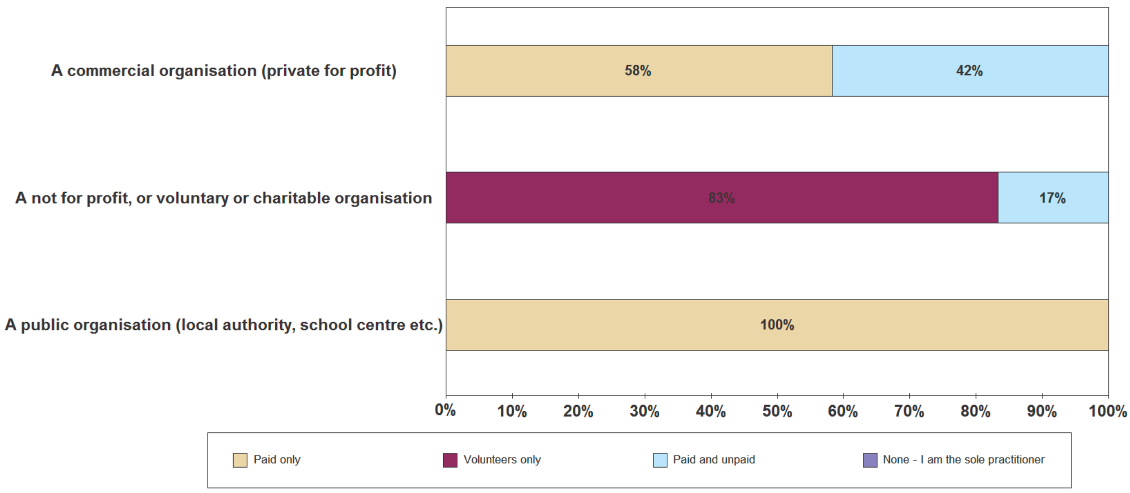



Figure 25: Employment type split per type of organisation in % (FI)

### 3.3.7 Outdoor organisation's offering

From the responses received, it seems that the most common service offered in Finland is outdoor recreation (76,2% of organisations) followed by outdoor education (28,6. The following figure provides an overview of all services offered by the Finnish organisations (multiple choices possible; no 'other services' added).

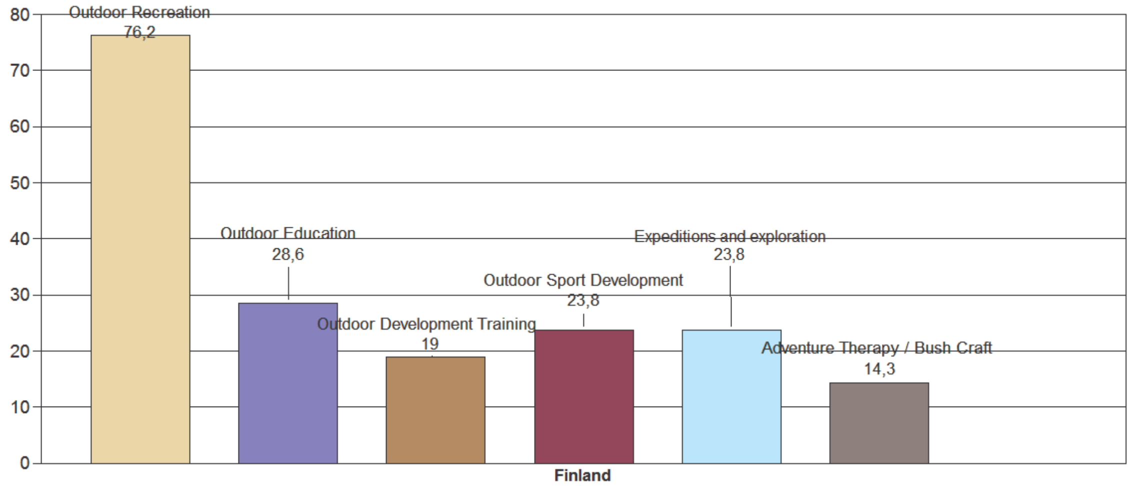



Figure 26: The outdoors service offer (FI)

### 3.3.8 Outdoor organisation's activities

The following tables highlight all activities offered by Finnish organisations in the different categories which are Air, Snow, Lakes & Sea, River and Earth. The results are split if delivered by own staff or by a sub-contractor (multiple choices possible):

**AIR**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 5 | - | 100,0% |
| Hot air balloon | 2 | - | 100,0% |
| Paragliding | 1 | - | 100,0% |
| Parapenting | 1 | - | 100,0% |
| Parachuting | 1 | - | 100,0% |
| ULM | - | - | - |

Table 17: Activities by outdoor service offer – AIR (FI)

## SNOW

| Analysis % Respondents | Total | | |
|---|---|---|---|
| | | Delivered by your staff | Delivered by a sub-contractor |
| Base | 83 | 78,3% | 25,3% |
| Skiing (Alpine) | 3 | 33,3% | 66,7% |
| Skiing (Cross Country) | 11 | 90,9% | 18,2% |
| Snow Boarding | 3 | 33,3% | 66,7% |
| Snow shoes trekking | 8 | 87,5% | 25,0% |
| Mountaineering | 2 | 100,0% | - |
| Snow mobile (motor) | 10 | 70,0% | 30,0% |
| Telemark skiing | 2 | 50,0% | 50,0% |
| Ski trekking | 5 | 80,0% | 40,0% |
| Kick sledding | 7 | 85,7% | 14,3% |
| Musher | 9 | 55,6% | 44,4% |
| Ice fishing | 9 | 100,0% | - |
| Ice skating | 7 | 100,0% | - |
| Sledging | 4 | 100,0% | - |
| Kite skiing | 2 | 50,0% | 50,0% |
| Ski joering (horse) | 1 | - | 100,0% |

Table 18: Activities by outdoor service offer – SNOW (FI)

## LAKES AND SEA

| Analysis % Respondents | Total | | |
|---|---|---|---|
| | | Delivered by your staff | Delivered by a sub-contractor |
| Base | 37 | 78,4% | 29,7% |
| Board surfing | 1 | 100,0% | - |
| Body board surfing | 1 | 100,0% | - |
| Canoeing / Kayaking / Sea Kayaking | 19 | 100,0% | 15,8% |
| Diving | 3 | - | 100,0% |
| Sailing | 4 | 25,0% | 75,0% |
| Water skiing/wake boarding | 2 | 100,0% | - |
| Wind surfing | - | - | - |
| Beach games | 2 | 100,0% | - |
| Buggy sailing | - | - | - |
| Fishing (Deep sea) | 1 | - | 100,0% |
| Parasailing | 1 | 100,0% | - |
| Jet ski | 3 | 66,7% | 33,3% |
| Kite surf | - | - | - |

Table 19: Activities by outdoor service offer –LAKES & SEA (FI)

## RIVER

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 54 | 94,4% | 16,7% |
| Rafting | 6 | 66,7% | 33,3% |
| Canoeing | 17 | 100,0% | 11,8% |
| Kayaking | 16 | 100,0% | 12,5% |
| Hydro speed | 1 | 100,0% | - |
| Rapid swimming | 3 | 100,0% | - |
| Fishing | 11 | 90,9% | 27,3% |

Table 20: Activities by outdoor service offer – RIVER (FI)

## EARTH

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 106 | 79,2% | 29,2% |
| Hiking / Hill walking | 9 | 88,9% | 22,2% |
| Nordic walk | 10 | 90,0% | 10,0% |
| Nature discovery | 10 | 90,0% | 20,0% |
| Orienteering | 7 | 85,7% | 14,3% |
| ATB biking | 4 | 75,0% | 50,0% |
| Cycling | 9 | 88,9% | 22,2% |
| Quad | 6 | 83,3% | 16,7% |
| Roller skating | 2 | 100,0% | - |
| 4x4 | 3 | 66,7% | 33,3% |
| Horse riding | 7 | 14,3% | 85,7% |
| Abseiling | 6 | 66,7% | 33,3% |
| Canyoning | 8 | 100,0% | 25,0% |
| Caving | - | - | - |
| High ropes parks | 2 | 50,0% | 50,0% |
| Rock climbing | 3 | 66,7% | 33,3% |
| Via Ferrata | 1 | - | 100,0% |
| Bungee jumping | 1 | 100,0% | - |
| Archery | 4 | 75,0% | 50,0% |
| Paint Ball | 4 | 50,0% | 50,0% |
| Shooting activities | 4 | 100,0% | 25,0% |
| Challenge courses | 6 | 100,0% | 16,7% |

Table 21: Activities by outdoor service offer – EARTH (FI)

App. 38 % of the organisations identify that they offer ‘other services’ than mentioned above:

- Reindeer safaris, Christmas activities, etc. searching Santa, making decorations...
- Kayaking, kayak-racing, sea-polo, and the others kayaking
- Karting, waterslides, minimoto, water balls etc
- Different water rescue education
- Extensive Sea-kayaking courses for adults and introduction courses for schoolchildren
- Wilderness skill courses, polar preparation courses
- Animal watching
- Nature product collection (mushrooms, berries, plants, etc.)

### 3.3.9 Outdoor organisation’s type of participants

The level of participation in all those activities (n=16) showed a significant variation, ranging from 150 participants/ members to in excess of 140.000 per year, whilst the Median is 875 participants (members) and the arithmetic mean (average) is 12,053 participants (members).

The following figure shows the main participant groups (with multiple choices possible) in percent:

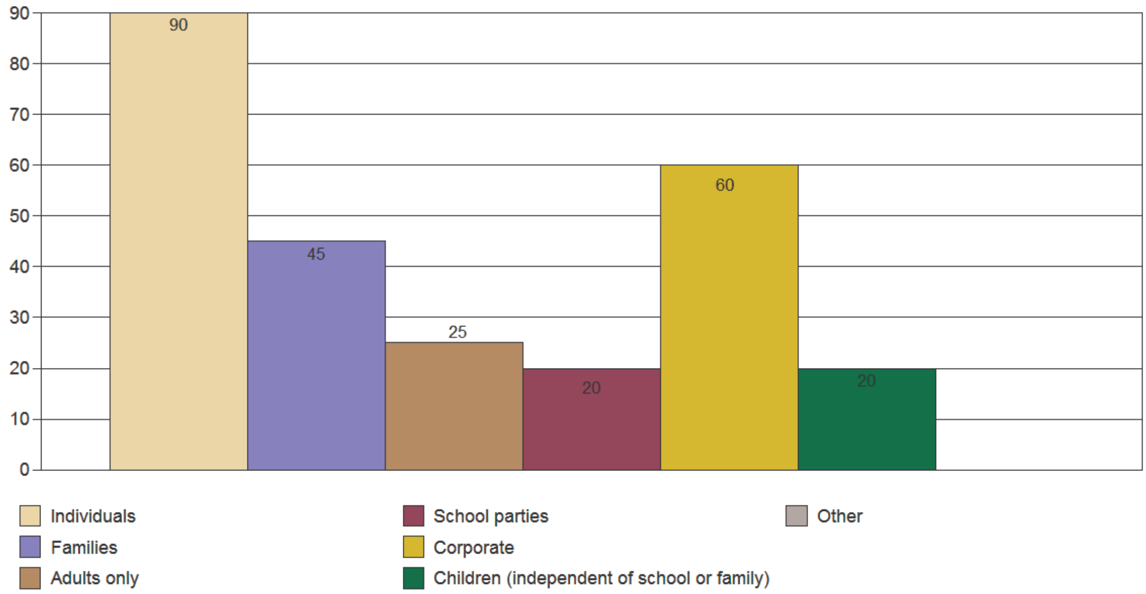



**Figure 27: Main participants (FI)**

### 3.3.10 Outdoor organisation’s seasonality

The figure below shows that from the responses received through the survey the outdoors industry in Finland is subject to some seasonal variation only: 85% of responding organisations from Finland identified the main high demand seasons in July and August, whilst. October and November appear to be the least busy ones for Finnish outdoors organisations. The most common month for closure was January. These results have to be taken into consideration carefully has they might be influenced by the location of the respondents. In this regards, one needs to take into account that geographical differences in Finland are important in the outdoors sector meaning that in the Southern part of Finland the outdoor organisation’s seasonality may differ significantly from those located in the Northern part of Finland.

| Analysis % Respondents | Total | High season | Low season | Closed - no activities offered |
|---|---|---|---|---|
| Base | 236 | 48,3% | 42,4% | 9,3% |
| January | 20 | 40,0% | 40,0% | 20,0% |
| February | 19 | 47,4% | 36,8% | 15,8% |
| March | 20 | 55,0% | 35,0% | 10,0% |
| April | 20 | 50,0% | 45,0% | 5,0% |
| May | 20 | 50,0% | 35,0% | 15,0% |
| June | 20 | 60,0% | 40,0% | - |
| July | 20 | 85,0% | 10,0% | 5,0% |
| August | 20 | 85,0% | 15,0% | - |
| September | 20 | 45,0% | 55,0% | - |
| October | 19 | 15,8% | 68,4% | 15,8% |
| November | 19 | 5,3% | 78,9% | 15,8% |
| December | 19 | 36,8% | 52,6% | 10,5% |

Table 22: Seasonal variation (FI)

### 3.3.11 Outdoor organisation's main challenges

In regards of key challenges facing outdoors organisations in Finland half of the organisations participating highlighted current 'weather and seasonality' (50%) as first choice, followed by the 'economic downturn' (40%); whilst lack of funding for qualification and training, skills shortages and gaps, business development and competition from larger providers (all 5%) remain challenges to only a minor group of those outdoor organisations. 'Other' challenges mentioned include 'human resources related factors' such as 'work time' and 'stress control'.

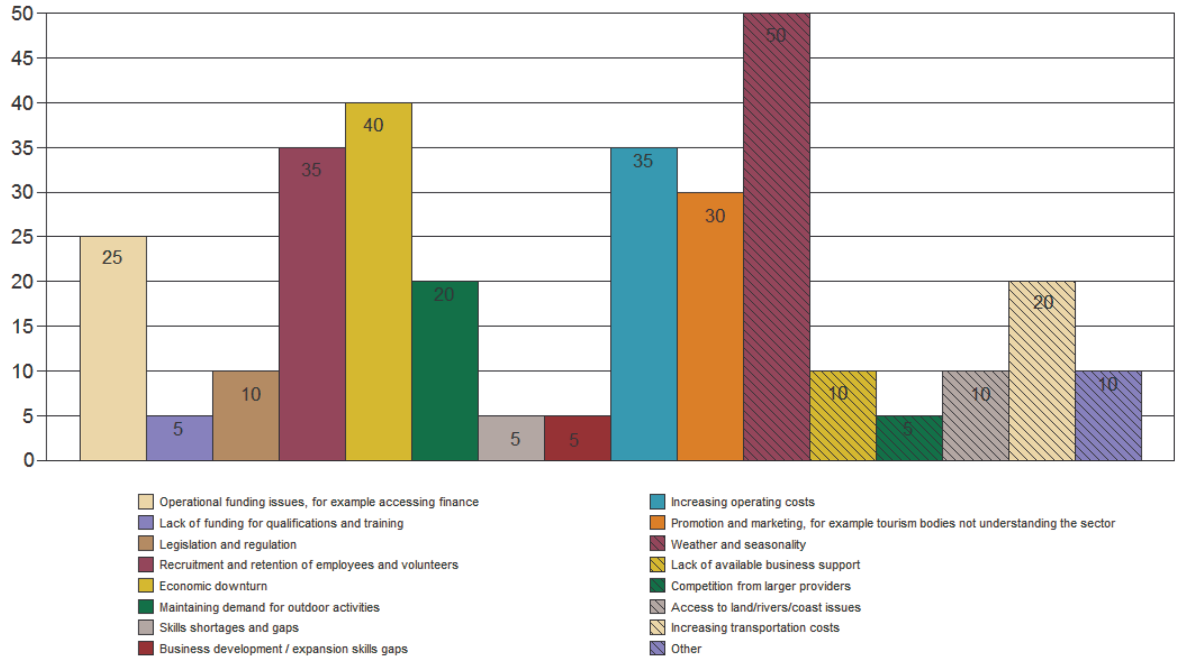



Figure 28: Main challenges facing organisation (FI)

## 3.4. France

### 3.4.1 General introduction[14]

From the responses received and the data collected through the CLO2 survey, this section gives a first picture of the outdoor sector in France and more precisely on the key activities and services offered by outdoors organisations, the main participants for those activities, and the seasonal variations of both activities.

The online survey developed by the CLO2 partnership was sent by SNELM to 2,192 French commercial private companies on the 18th of May 2010, throughout France on a quite evenly repartition between the "Departments"; a reminder was then sent on the 19th of July on the same base. The companies targeted are operating in the Active Leisure sub-sector, providing such services as surf, windsurf, sailing, jet-ski, kite-surf, scuba diving, alpine skiing, Nordic skiing, snowboarding, mushing, snow-shoes walking, sledging, hiking, karting, 4x4, mountain biking, quad, canyoning, via-ferrata, kayaking, hydro-speed, rafting, parachute, hot-air balloon, horse riding, high rope courses, etc. The mailing list used was internal to SNELM as provided by members, plus an unknown number of indirect contacts through French outdoor networks,

It has to be noted that the results analysed and highlighted in this national section do not represent the situation in France but have to be considered carefully as they are based on the responses received through the survey and only represent a limited number of organisations. But for the first time, this enables a picture of the sector to be built up at the national and then European level, which is essential to promote the sector's value both nationally and within the European Community. The following table provides an overview on general country data:

| | | |
|---|---|---|
| **Size of the country** | **543,964 km²** | Eurostat 2008 |
| **Total Population** | **64,366,962** | Eurostat 2009 |
| **Labour Force[15]** | **40,849,600** | Eurostat 2008 |
| **Active Population** | **28,168,100** | Eurostat Q1 2010 |
| **Employment Rate** | **64.2 %** | Eurostat 2009 |
| **GDP per capita in PPS[16]** | **107** | Eurostat 2009 |

Table 23: General country data (FR)

[14] The project partners from France have been: Syndicat National des Entreprises exploitant les activités physiques – www.snelm.org and Université Claude Bernard Lyon 1 – www.univ-lyon1.fr

[15] The labour force or the economically active population includes both employed and unemployed people, but not the economically inactive, such as pre-school children, school children, students and pensioners.

[16] Gross domestic product (GDP) is a measure for the economic activity. It is defined as the value of all goods and services produced less the value of any goods or services used in their creation. The volume index of GDP per capita in Purchasing Power Standards (PPS) is expressed in relation to the European Union (EU-27) average set to equal 100. If the index of a country is higher than 100, this country's level of GDP per head is higher than the EU average and vice versa. Basic figures are expressed in PPS, i.e. a common currency that eliminates the differences in price levels between countries allowing meaningful volume comparisons of GDP between countries. Please note that the index, calculated from PPS figures and expressed with respect to EU27 = 100, is intended for cross-country comparisons rather than for temporal comparisons.

### 3.4.2 Key data and facts for France

**SURVEY KEY DATA AND FACTS:**

- From France 81 outdoor organisations have participated in the EU outdoors survey (80 responded in French and 1 in Portuguese language)
- The profile of organisations participating in this survey from France was more or less all commercial / private organisations (95%), with only 3% not-for-profit or voluntary organisations.
- Most of those outdoor organisations in France have less than 50 permanent members of staff. Overall app 73% of the organisations was micro businesses (with one to ten permanent and seasonal employees).
- Around 77,3% of outdoor organisations replied from France employ paid staff and around 10,3% have some volunteers.
- Outdoor organisations from France report a range from 150 participants/ members to an excess of 205.000 per year, whilst the Median is 3.100 and the arithmetic mean (average) is 10.893 participants (members).
- 81.5% of outdoor organisations deliver services to families.
- Around 48,1% of outdoor organisations deliver services to schools plus another 53,1% to children independent of school or family.
- 86.4% of the French outdoor organisations deliver services to adults only.
- The French outdoors sector is subject to seasonal variation.
- The height of the outdoors season in France is June to August.
- From the responses, the least busy season in France is October till March. It is important to notify that this element does not take into consideration the economic aspects of the seasonal activities so the results need to be read with prudence.
- Weather and seasonality (67,5%) as first choice, followed by increasing operating costs (62,5%) are mentioned as major challenges for the outdoors sector in France.

### 3.4.3 Type of organisations

Organisations in France include a mix of not-for-profit / voluntary organisations, commercial / private operators, or public organisations / local authorities, whilst replies in this survey were nearly all from the for-profit sector:

- 95% are commercial organisation (private for profit)
- 3% are not for profit or voluntary organisation

No reply has been received from a public organisation (local authority, school centre etc.).

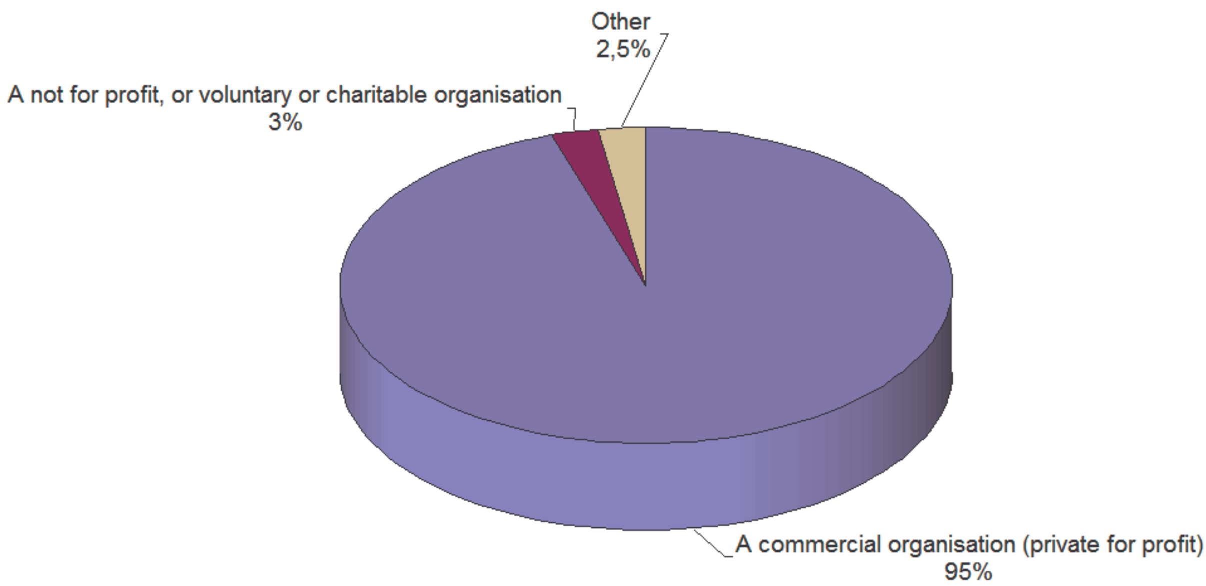



Figure 29: Organisation type (FR)

### 3.4.4 Type of employment and characteristics of the workforce (paid/unpaid)

Overall, 81 outdoors organisations completed the Outdoors Survey from France. Nearly all of those outdoor organisations (except two) from France (n=78) have less than 50 permanent and seasonal members of staff. Overall app 73% of the organisations was micro businesses, employing between one and ten members of permanent and seasonal staff. Considering permanent staff only, 96% of the organisations would be rated as micro business.

Overall around 77,3% of organisations in France identified that they currently employ paid staff and around 10,3% currently had volunteer staff. Further analysis reveals that none of the organisations operated entirely on volunteers, 67% operated entirely on paid employees and app. 23% were sole practitioners. Overall, 10,3% of organisations had a mixture of paid staff and volunteers.

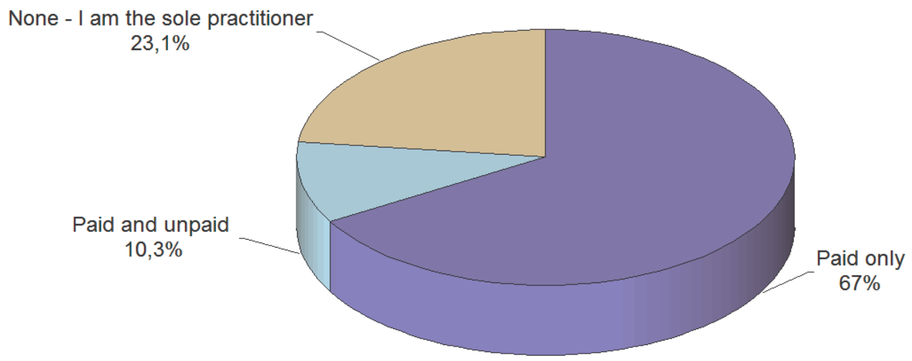
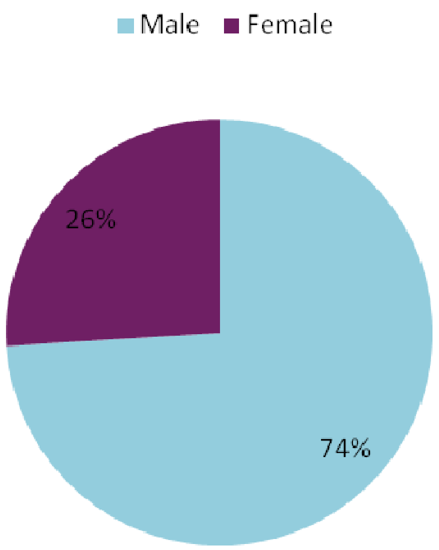



Figure 30: Employment type (FR)

The French outdoor employers which filled the survey identified that they currently employed around 22,226 people in total (including volunteers); including 1,981 of paid staff. Overall, 1,332 of paid employees worked in a permanent position and 649 on seasonal basis. 171 were self employed/ freelancers and 20,074[17] people were working on a voluntary basis in those organisations.

### 3.4.5 The workforce: gender and age splits

The following two figures show the workforce situation split by gender and age:



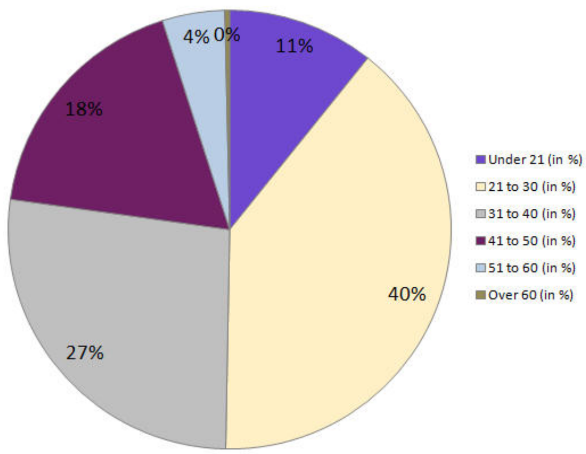




Figure 31: Workforce – gender split (FR)

Figure 32: Workforce – age split (FR)[18]

[17] Please note that one organisation has provided the information that 20,000 people work as volunteers led by 150 paid staff (permanent basis).

[18] The exact information provided for the workforce over 60 was 0.36%

### 3.4.6 Type of employment split per type of organisation

The following figure indicates the employment type split by the type of organisations from which the replies were received:

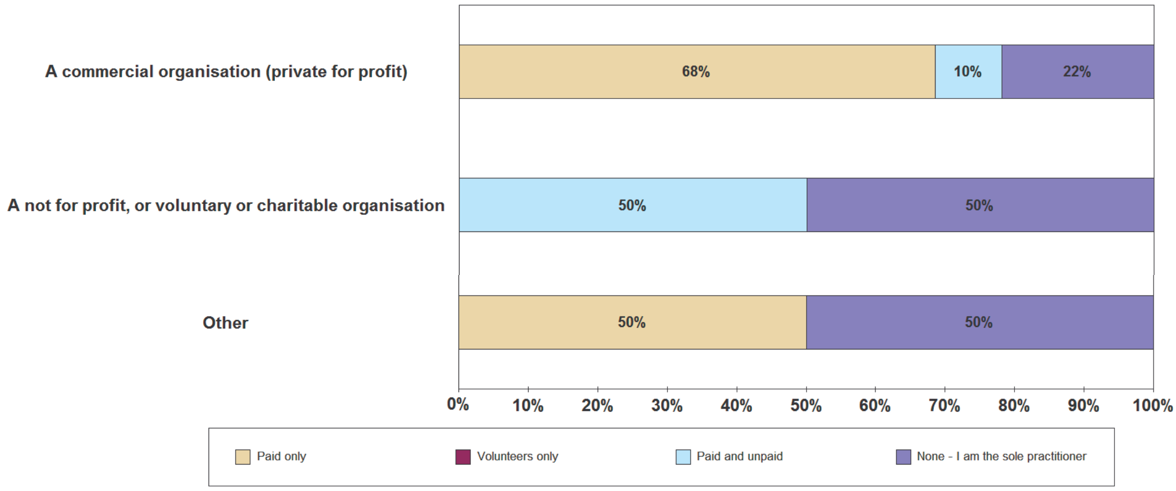



Figure 33: Employment type split per type of organisation in % (FR)

### 3.4.7 Outdoor organisation's offering

From the responses received, it seems that the most common service offered in France is outdoor recreation (79,7% of organisations) followed by outdoor education (36,7%). The following figure provides an overview of all services offered by the French organisations (multiple choices possible). The category 'other' included services such as: Events, business tourism, leisure group and corporate activities.

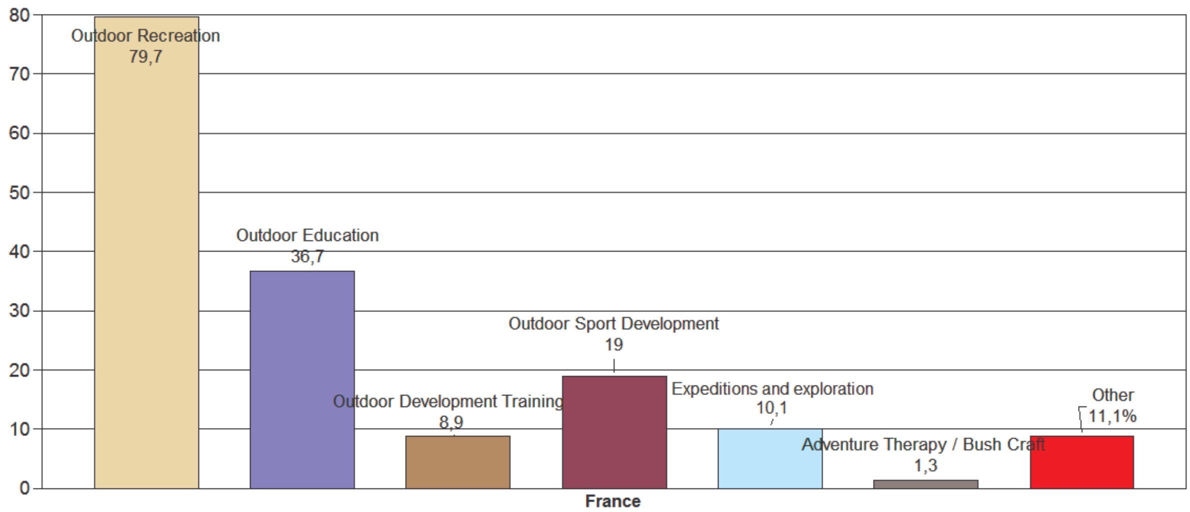



Figure 34: The outdoors service offer (FR)

### 3.4.8 Outdoor organisation's activities

The following tables highlight all activities offered by French organisations in the different categories which are Air, Snow, Lakes & Sea, River and Earth. The results are split if delivered by own staff or by a sub-contractor (multiple choices possible):

**AIR**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 25 | 60,0% | 48,0% |
| Hot air balloon | 5 | 80,0% | 20,0% |
| Paragliding | 1 | 100,0% | - |
| Parapenting | 7 | 42,9% | 57,1% |
| Parachuting | 7 | 57,1% | 71,4% |
| ULM | 5 | 60,0% | 40,0% |

Table 24: Activities by outdoor service offer – AIR (FR)

**SNOW**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 78 | 82,1% | 26,9% |
| Skiing (Alpine) | 5 | 80,0% | 20,0% |
| Skiing (Cross Country) | 4 | 75,0% | 25,0% |
| Snow Boarding | 4 | 100,0% | - |
| Snow shoes trekking | 14 | 92,9% | 14,3% |
| Mountaineering | 16 | 75,0% | 43,8% |
| Snow mobile (motor) | 2 | 50,0% | 50,0% |
| Telemark skiing | 1 | 100,0% | - |
| Ski trekking | 20 | 95,0% | 20,0% |
| Kick sledding | 1 | 100,0% | - |
| Musher | 5 | 40,0% | 60,0% |
| Ice fishing | - | - | - |
| Ice skating | - | - | - |
| Sledging | 3 | 66,7% | 33,3% |
| Kite skiing | 1 | 100,0% | - |
| Ski joering (horse) | 2 | 50,0% | 50,0% |

Table 25: Activities by outdoor service offer – SNOW (FR)

**LAKES AND SEA**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 68 | 79,4% | 22,1% |
| Board surfing | 4 | 75,0% | 25,0% |
| Body board surfing | 4 | 75,0% | 25,0% |
| Canoeing / Kayaking / Sea Kayaking | 17 | 88,2% | 11,8% |
| Diving | 8 | 87,5% | 12,5% |
| Sailing | 13 | 76,9% | 30,8% |
| Water skiing/wake boarding | 4 | 75,0% | 25,0% |
| Wind surfing | 4 | 100,0% | - |
| Beach games | 1 | 100,0% | - |
| Buggy sailing | 2 | 100,0% | - |
| Fishing (Deep sea) | 1 | 100,0% | - |
| Parasailing | 2 | 50,0% | 50,0% |
| Jet ski | 6 | 33,3% | 66,7% |
| Kite surf | 2 | 100,0% | - |

Table 26: Activities by outdoor service offer –LAKES & SEA (FR)

**RIVER**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 92 | 70,7% | 30,4% |
| Rafting | 21 | 57,1% | 47,6% |
| Canoeing | 25 | 80,0% | 20,0% |
| Kayaking | 23 | 78,3% | 21,7% |
| Hydro speed | 19 | 63,2% | 36,8% |
| Rapid swimming | 2 | 100,0% | - |
| Fishing | 2 | 50,0% | 50,0% |

Table 27: Activities by outdoor service offer – RIVER (FR)

**EARTH**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 225 | 72,4% | 33,3% |
| Hiking / Hill walking | 14 | 78,6% | 42,9% |
| Nordic walk | 7 | 100,0% | - |
| Nature discovery | 19 | 84,2% | 26,3% |
| Orienteering | 19 | 78,9% | 21,1% |
| ATB biking | 8 | 100,0% | - |
| Cycling | 8 | 75,0% | 25,0% |
| Quad | 13 | 69,2% | 30,8% |
| Roller skating | 1 | 100,0% | - |
| 4x4 | 2 | 100,0% | - |
| Horse riding | 6 | 66,7% | 33,3% |
| Abseiling | 8 | 100,0% | 12,5% |
| Canyoning | 22 | 72,7% | 40,9% |
| Caving | 7 | 42,9% | 57,1% |
| High ropes parks | 19 | 73,7% | 26,3% |
| Rock climbing | 19 | 73,7% | 36,8% |
| Via Ferrata | 13 | 61,5% | 46,2% |
| Bungee jumping | 2 | 50,0% | 50,0% |
| Archery | 10 | 40,0% | 60,0% |
| Paint Ball | 10 | 50,0% | 50,0% |
| Shooting activities | 2 | 50,0% | 50,0% |
| Challenge courses | 16 | 62,5% | 43,8% |

Table 28: Activities by outdoor service offer – EARTH (FR)

Almost 51 % of the organisations identify that they offer ‘other services’ than mentioned above:

- Quad rides with state qualified guide
- Autogiro and multiaxial ULM
- Tandem Parachute tester
- 4WD, motorbike and quad
- Electric boat rental, pedal boats, water bikes
- Karting
- Quad and motorbike rides
- Leisure center (high ropes, housing, food, other recreational activities)
- Sea kayak rental
- Air board, yooner and paret sledging, bike board, Arapaho scooter, electric bike, treasure hunting, hide and seek, team building, Indonesian bow shooting, blowpipe, track and field game
- Ice cream and beverages

- Aqua ride, BMX, biathlon, biathlon rides
- All inclusive lodging
- Restaurant, stud and hens' do's, seminars
- Nordic walking
- Palm rides
- White water activities, canyonning, rafting, canoe, hydrospeed
- Housing and restaurant
- Pist marking creation and maintenance of hiking tracks
- Walking and donkey riding and horse riding tourism
- Paintball and laser water games
- Organising all inclusive active leisure vacation
- Plane driving
- Paragliding
- High ropes
- Karting: all public rental, seminar and group challenges, leisure contests, french karting school, shop, and racing karting workshop
- Swin golf
- Car driving courses
- River paddling

### 3.4.9 Outdoor organisation's type of participants

The level of participation in all those activities showed a significant variation, ranging from 150 participants / members to in excess of 205.000 per year, whilst the Median is 3,100 participants (members) and the arithmetic mean (average) is 10,893 participants (members).

The following figure shows the main participant groups (with multiple choices possible) in percent. Amongst those mentioned as main participant groups in 'other' were: Persons with reduced mobility, not-for-profit clubs and clubs, and leisure centres.

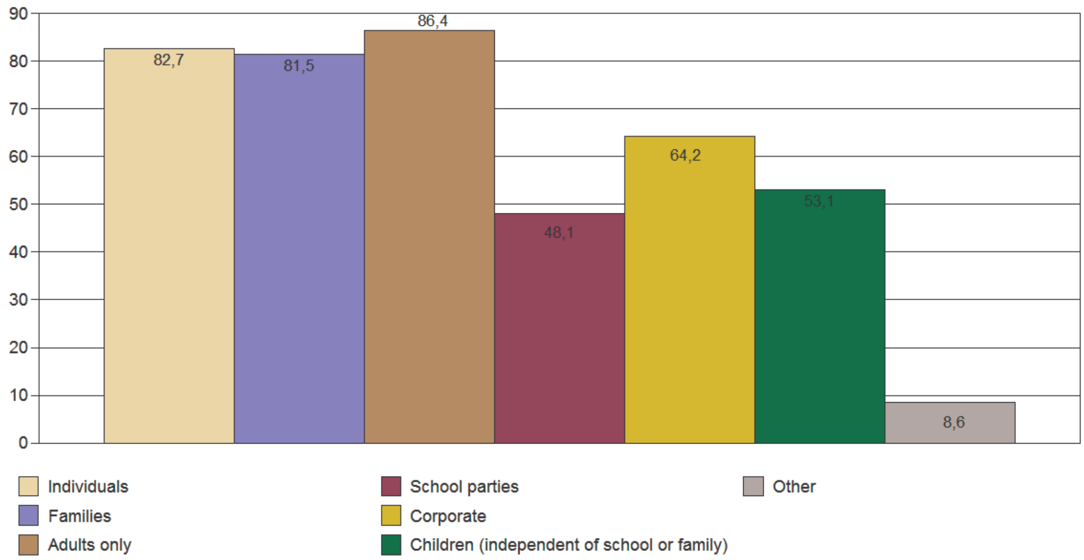



Figure 35: Main participants (FR)

### 3.4.10 Outdoor organisation's seasonality

The figure below shows that from the responses received through the survey the outdoors industry in France is subject to seasonal variation. Between 63,3% and 91% of the responding organisations from France identified the main high demand seasons from June to August, whilst a peak was experienced in July (91%). The autumn/winter months of October till March appear to be the least busy ones for French outdoors organisations. The most common months for closure were December till February with a peak (47%) in January. It is important to notify that this element does not take into consideration the economic aspects of the seasonal activities so the results need to be read with prudence.

| Analysis % Respondents | Total | High season | Low season | Closed - no activities offered |
|---|---|---|---|---|
| Base | 911 | 42,2% | 44,2% | 13,6% |
| January | 76 | 18,4% | 34,2% | 47,4% |
| February | 75 | 20,0% | 44,0% | 36,0% |
| March | 75 | 20,0% | 64,0% | 16,0% |
| April | 77 | 31,2% | 66,2% | 2,6% |
| May | 75 | 54,7% | 45,3% | - |
| June | 79 | 63,3% | 36,7% | - |
| July | 78 | 91,0% | 9,0% | - |
| August | 78 | 85,9% | 14,1% | - |
| September | 79 | 49,4% | 49,4% | 1,3% |
| October | 75 | 30,7% | 65,3% | 4,0% |
| November | 71 | 15,5% | 62,0% | 22,5% |
| December | 73 | 19,2% | 43,8% | 37,0% |

Table 29: Seasonal variation (FR)

In regards of key challenges facing outdoors organisations in France mostly all of the organisations participating highlighted the weather and seasonality (67,5%) as first choice, followed by 'increasing operating costs' (62,5%); whilst skills shortages and gaps (2.5%) remain challenges to only a minor group of outdoor organisations. Under the category 'other', unfair trading, the seasonal character of the sector (bank financing), the incompatibility of the sport law for parachuting activities and problems for commercial organisations within a non-for-profit led sport environment.

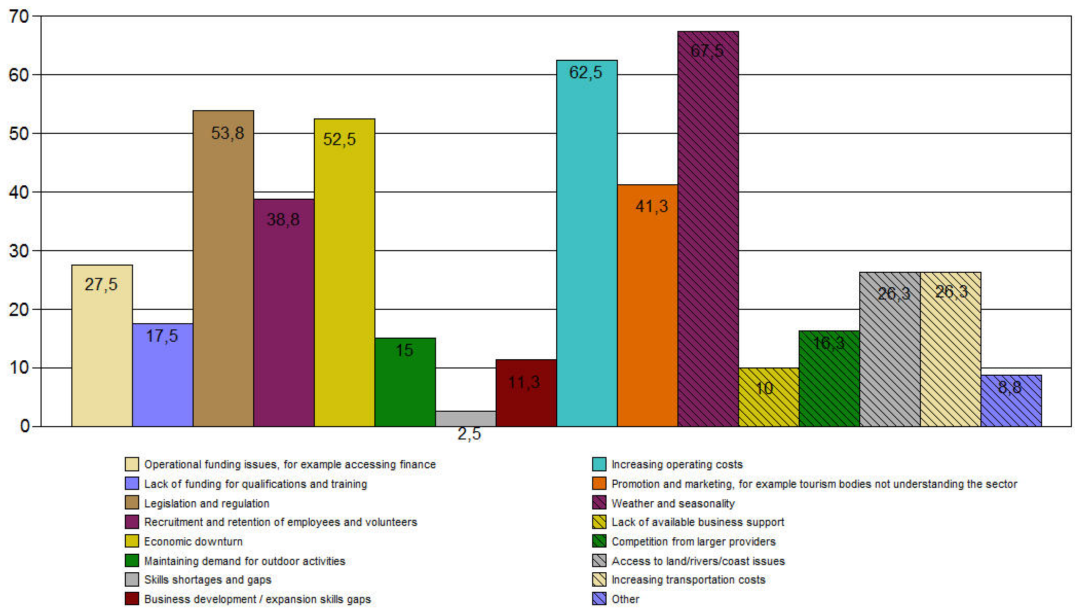



Figure 36: Main challenges facing organisation (FR)

## 3.5. Greece

### 3.5.1 General introduction[19]

From the responses received and the data collected through the CLO2 survey, this section gives a first picture of the outdoor sector in Greece and more precisely on the key activities and services offered by outdoors organisations, the main participants for those activities, and the seasonal variations of both activities.

The sample for the survey was developed by the University of Thrace and was composed of a variety of organisations from the Outdoors. The questionnaire was then disseminated to that sample plus an unknown number of indirect contacts through Greek outdoor networks.

It has to be noted that the results analysed and highlighted in this national section do not represent the situation in Greece but have to be considered carefully as they are based on the responses received through the survey and only represent a limited number of organisations. But for the first time, this enables a picture of the sector to be built up at the national and then European level, which is essential to promote the sector's value both nationally and within the European Community.

The following table provides an overview on general country data:

| | | |
|---|---|---|
| **Size of the country** | **131,625 km²** | Eurostat 2008 |
| **Total Population** | **11,260,402** | Eurostat 2009 |
| **Labour Force[20]** | **7,231,900** | Eurostat 2008 |
| **Active Population** | **4,939,900** | Eurostat Q2 2010 |
| **Employment Rate** | **61.2 %** | Eurostat 2009 |
| **GDP per capita in PPS[21]** | **95** | Eurostat 2009 |

Table 30: General country data (EL)

[19] Project partner from Greece has been: Democritus University of Thrace – www.duth.gr

[20] The labour force or the economically active population includes both employed and unemployed people, but not the economically inactive, such as pre-school children, school children, students and pensioners.

[21] Gross domestic product (GDP) is a measure for the economic activity. It is defined as the value of all goods and services produced less the value of any goods or services used in their creation. The volume index of GDP per capita in Purchasing Power Standards (PPS) is expressed in relation to the European Union (EU-27) average set to equal 100. If the index of a country is higher than 100, this country's level of GDP per head is higher than the EU average and vice versa. Basic figures are expressed in PPS, i.e. a common currency that eliminates the differences in price levels between countries allowing meaningful volume comparisons of GDP between countries. Please note that the index, calculated from PPS figures and expressed with respect to EU27 = 100, is intended for cross-country comparisons rather than for temporal comparisons.

### 3.5.2 Key data and facts for Greece

**SURVEY KEY DATA AND FACTS:**

- From Greece 27 outdoor organisations have participated in the EU outdoors survey (all in Greek language)
- The profile of organisations participating in this survey from Greece was mostly only commercial / private organisations (95%), and 4% not-for-profit, or voluntary or charitable organisations.
- Most of those outdoor organisations from Greece have less than 50 permanent members of staff. Overall app 62.5% of the organisations was micro businesses (with one to ten permanent and seasonal employees).
- Around 84% of outdoor organisations from Greece employ paid staff and around 16% have some volunteers; only 4% of the organisations operated entirely on volunteers.
- Outdoor organisations from Greece report a range from 4 participants/ members to an excess of 10.000 per year, whilst the Median is 1.000 and the arithmetic mean (average) is 2.310 participants (members).
- 70,8% of outdoor organisations deliver services to families.
- Around 50% of outdoor organisations deliver services to schools plus another 54,2% to children independent of school or family.
- Only 12.5% of the Greek outdoor organisations deliver services to adults only.
- The Greek outdoors sector is subject to seasonal variation.
- The height of the outdoors season in Greece is April to October.
- The least busy season in Greece is November to February
- Legislation and regulation issues (72%) as first choice, closely followed by lack of available business support (68%) are mentioned as major challenges for the outdoors sector in Greece

### 3.5.3 Type of organisations

Organisations in Greece include a mix of not-for-profit / voluntary organisations, commercial / private operators, or public organisations / local authorities, whilst replies in this survey were mostly all from the for-profit sector:

- 96% are commercial organisation (private for profit)
- 4% are not for profit, or voluntary or charitable organisation

No replies were received from public organisation (local authority, school centre etc.).

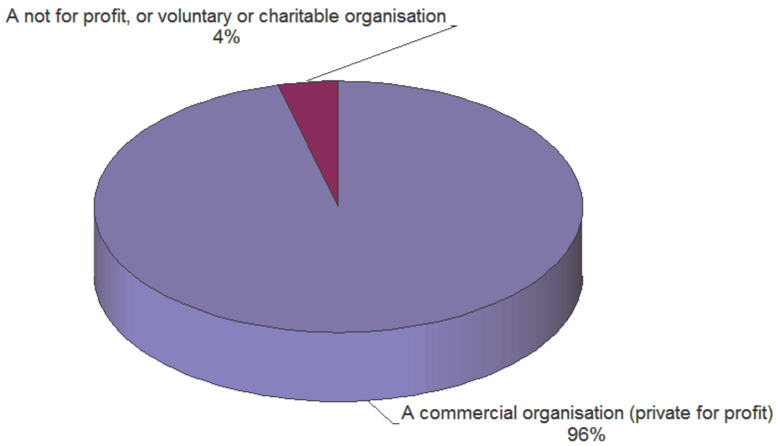



Figure 37: Organisation type (EL)

### 3.5.4 Type of employment and characteristics of the workforce (paid/unpaid)

Overall, 27 outdoors organisations completed the Outdoors Survey from Greece. Nearly all of those outdoor organisations (except one) from Greece (n=24) have less than 50 permanent and seasonal members of staff. Overall app 62.5% of the organisations was micro businesses, employing between one and ten members of permanent and seasonal staff. Considering permanent staff only, app. 93% of the organisations would be rated as micro business.

Overall around 84% of organisations in Greece identified that they currently employ paid staff and around 16% currently had volunteer staff. Further analysis reveals that 4% of organisations operated entirely on volunteers, 72% operated entirely on paid employees and app. 12% was sole practitioners. Overall, 12% of organisations had a mixture of paid staff and volunteers.

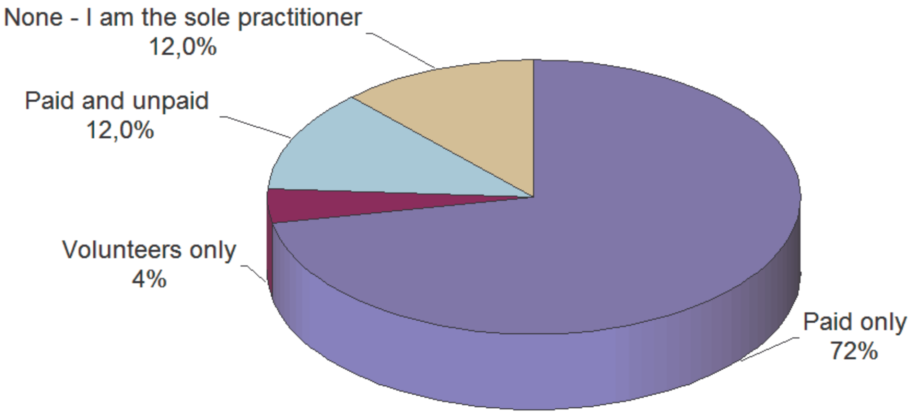



Figure 38: Employment type (EL)

The Greek outdoor employers which filled the survey identified that they currently employed around 542 people in total (including volunteers); 421 of members of paid staff. Overall, 87 of paid employees worked in a permanent position and 334 on seasonal basis. 49 were self employed/ freelancers and 72 were working on a voluntary basis.

### 3.5.5 The workforce: gender and age splits

The following two figures show the workforce situation split by gender and age:

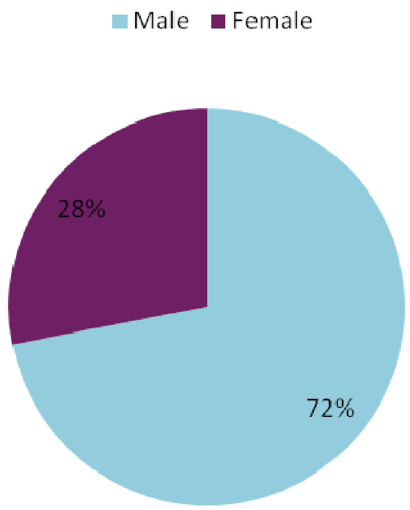



Figure 39: Workforce – gender split (EL)

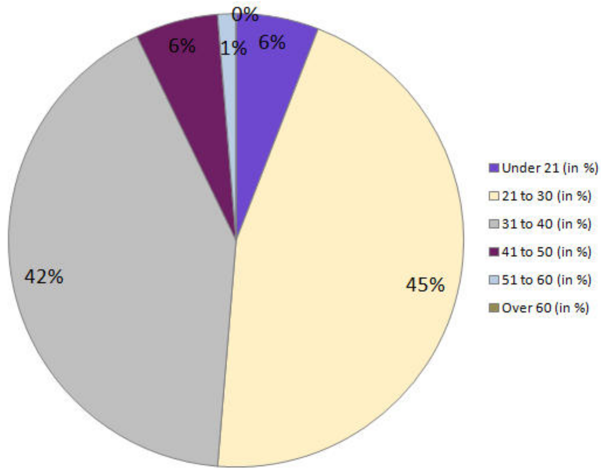



Figure 40: Workforce – age split (EL)

### 3.5.6 Type of employment split per type of organisation

The following figure indicates the employment type split by the type of organisations from which the replies were received:

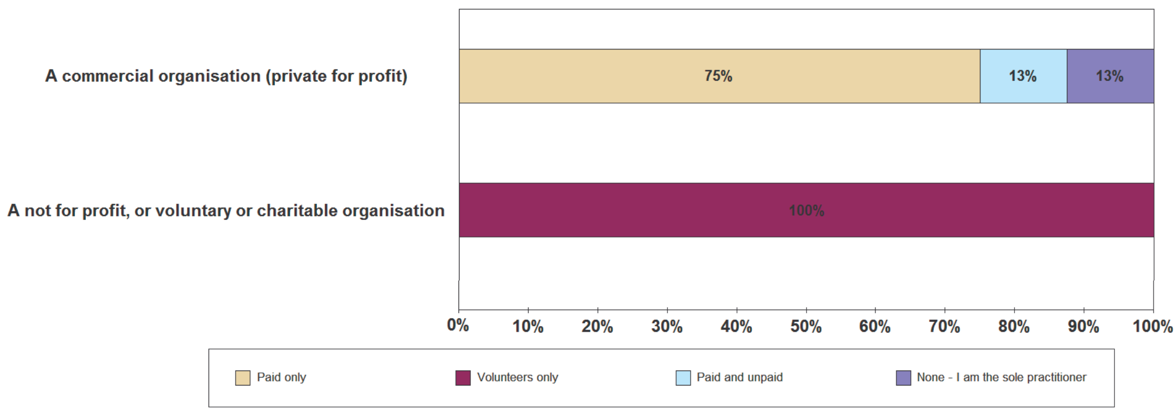



Figure 41: Employment type split per type of organisation in % (EL)

### 3.5.7 Outdoor organisation's offering

From the responses received, it seems that the most common service offered in Greece is outdoor recreation (96% of organisations) followed by outdoor education (60%). The following figure provides an overview of all services offered by the Greece organisations (multiple choices possible). The category 'other' included the service to understand and learn farming techniques.

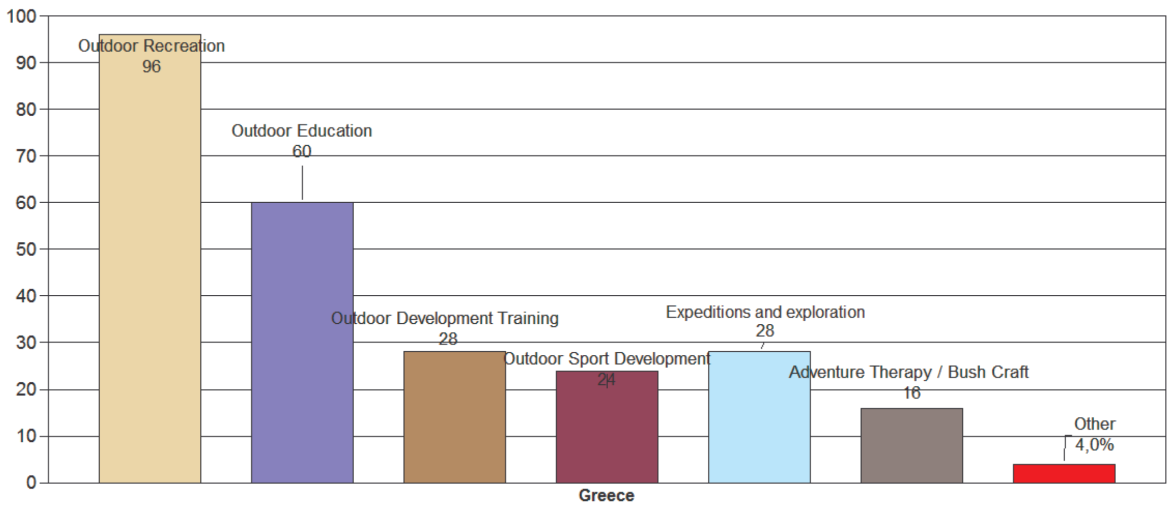



Figure 42: The outdoors service offer (EL)

### 3.5.8 Outdoor organisation's activities

The following tables highlight all activities offered by Greek organisations in the different categories which are Air, Snow, Lakes & Sea, River and Earth. The results are split if delivered by own staff or by a sub-contractor (multiple choices possible):

**AIR**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 4 | - | 100,0% |
| Hot air balloon | - | - | - |
| Paragliding | 1 | - | 100,0% |
| Parapenting | 1 | - | 100,0% |
| Parachuting | 2 | - | 100,0% |
| ULM | - | - | - |

Table 31: Activities by outdoor service offer – AIR (EL)

## SNOW

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 21 | 57,1% | 47,6% |
| Skiing (Alpine) | 5 | 80,0% | 40,0% |
| Skiing (Cross Country) | 2 | 50,0% | 50,0% |
| Snow Boarding | 2 | - | 100,0% |
| Snow shoes trekking | 1 | - | 100,0% |
| Mountaineering | 7 | 85,7% | 14,3% |
| Snow mobile (motor) | 2 | - | 100,0% |
| Telemark skiing | - | - | - |
| Ski trekking | 2 | 50,0% | 50,0% |
| Kick sledding | - | - | - |
| Musher | - | - | - |
| Ice fishing | - | - | - |
| Ice skating | - | - | - |
| Sledging | - | - | - |
| Kite skiing | - | - | - |
| Ski joering (horse) | - | - | - |

Table 32: Activities by outdoor service offer – SNOW (EL)

## LAKES AND SEA

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 53 | 60,4% | 45,3% |
| Board surfing | - | - | - |
| Body board surfing | - | - | - |
| Canoeing / Kayaking / Sea Kayaking | 13 | 84,6% | 15,4% |
| Diving | 10 | 60,0% | 50,0% |
| Sailing | 7 | 14,3% | 85,7% |
| Water skiing/wake boarding | 4 | 75,0% | 50,0% |
| Wind surfing | 2 | 50,0% | 50,0% |
| Beach games | 8 | 100,0% | - |
| Buggy sailing | 1 | - | 100,0% |
| Fishing (Deep sea) | - | - | - |
| Parasailing | 1 | - | 100,0% |
| Jet ski | 5 | 20,0% | 100,0% |
| Kite surf | 2 | 50,0% | 50,0% |

Table 33: Activities by outdoor service offer –LAKES & SEA (EL)

## RIVER

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 54 | 75,9% | 27,8% |
| Rafting | 14 | 71,4% | 35,7% |
| Canoeing | 14 | 85,7% | 14,3% |
| Kayaking | 13 | 76,9% | 30,8% |
| Hydro speed | 7 | 71,4% | 28,6% |
| Rapid swimming | 3 | 33,3% | 66,7% |
| Fishing | 3 | 100,0% | - |

Table 34: Activities by outdoor service offer – RIVER (EL)

## EARTH

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 178 | 76,4% | 27,0% |
| Hiking / Hill walking | 17 | 100,0% | 5,9% |
| Nordic walk | 1 | 100,0% | - |
| Nature discovery | 10 | 100,0% | 10,0% |
| Orienteering | 10 | 100,0% | - |
| ATB biking | 8 | 87,5% | 12,5% |
| Cycling | 11 | 72,7% | 27,3% |
| Quad | 3 | 100,0% | - |
| Roller skating | - | - | - |
| 4x4 | 16 | 93,8% | 12,5% |
| Horse riding | 12 | 16,7% | 83,3% |
| Abseiling | 5 | 80,0% | 20,0% |
| Canyoning | 12 | 75,0% | 33,3% |
| Caving | 2 | 100,0% | - |
| High ropes parks | 12 | 66,7% | 41,7% |
| Rock climbing | 16 | 81,3% | 18,8% |
| Via Ferrata | 5 | 40,0% | 60,0% |
| Bungee jumping | 2 | - | 100,0% |
| Archery | 16 | 100,0% | 6,3% |
| Paint Ball | 11 | 27,3% | 72,7% |
| Shooting activities | 5 | 40,0% | 60,0% |
| Challenge courses | 4 | 100,0% | - |

Table 35: Activities by outdoor service offer – EARTH (EL)

Almost 26 % of the organisations identify that they offer ‘other services’ than mentioned above:

- Agrotourism activities. Combined activities of hiking and shows of farming. Shows of farming without hiking
- Canoeing,rafting,hiking,4X4,archery,high rope park, canyoning, sea kayaking, horse riding
- Lessons of rescuing and surviving - hiking - ecology
- Children’s outdoor camps at organised facilities
- Organisation/implementation services (escort services, equipment, knowhow of activities and its territory, regional movement strictly at the activity's territory - beginning / end) and at a more regular and priority base according to the frequency / demand at the activities of canyoning, rafting, river canoe, mountain hiking, sea kayak, mountain bike
- Conducted tour of environment

### 3.5.9 Outdoor organisation’s type of participants

The level of participation in all those activities showed a significant variation, ranging from only 4 participants/ members to in excess of 10.000 per year, whilst the Median is 1.000 participants (members) and the arithmetic mean (average) is 2.310 participants (members).

The following figure shows the main participant groups (with multiple choices possible) in percent. Under the category ‘other’, business stakeholders were mentioned.

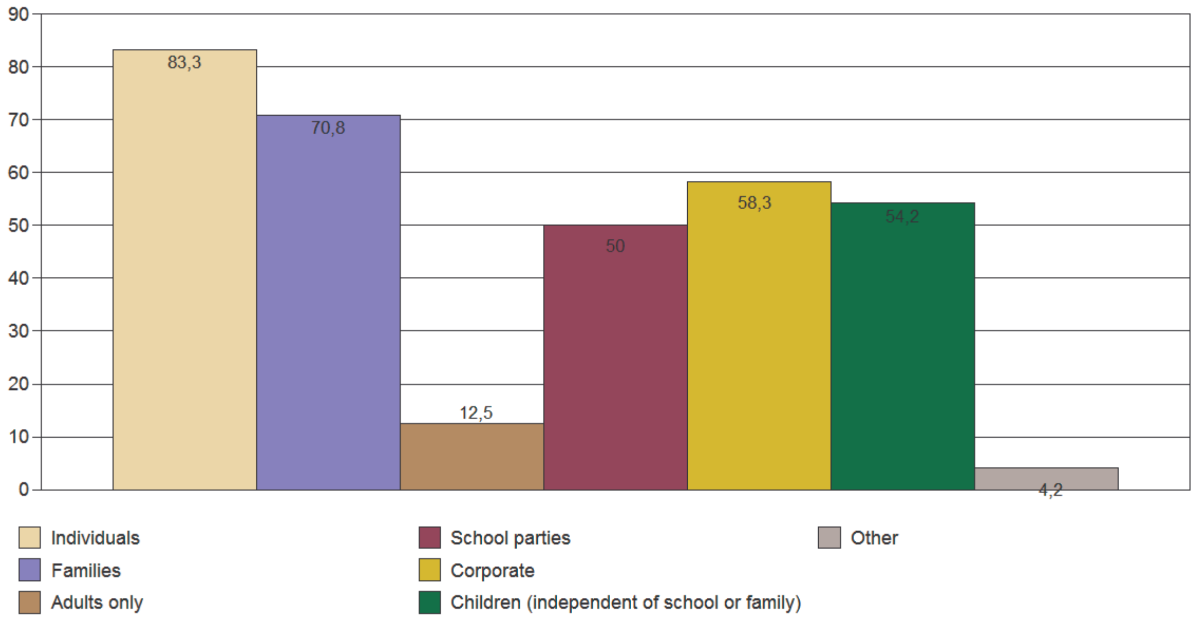



Figure 43: Main participants (EL)

### 3.5.10 Outdoor organisation’s seasonality

The figure below shows that from the responses received through the survey the outdoors industry in Greece is subject to some seasonal variation. Between 56% and 84% of responding organisations from Greece identified the main high demand seasons from April to October, whilst peaks were experienced in May and June. The winter months of November to February (reaching into March) appear to be the least busy ones for Greek outdoors organisations. The most common months for closure were December and January/February.

| Analysis % Respondents | Total | | | |
|---|---|---|---|---|
| | | High season | Low season | Closed - no activities offered |
| Base | 290 | 49,7% | 43,8% | 6,6% |
| January | 24 | 20,8% | 62,5% | 16,7% |
| February | 22 | 13,6% | 72,7% | 13,6% |
| March | 24 | 41,7% | 54,2% | 4,2% |
| April | 24 | 62,5% | 33,3% | 4,2% |
| May | 25 | 84,0% | 12,0% | 4,0% |
| June | 25 | 72,0% | 28,0% | - |
| July | 25 | 64,0% | 36,0% | - |
| August | 25 | 68,0% | 28,0% | 4,0% |
| September | 25 | 56,0% | 40,0% | 4,0% |
| October | 24 | 62,5% | 33,3% | 4,2% |
| November | 23 | 21,7% | 69,6% | 8,7% |
| December | 24 | 20,8% | 62,5% | 16,7% |

Table 36: Seasonal variation (EL)

### 3.5.11 Outdoor organisation's main challenges

In regards of key challenges facing outdoors organisations in Greece more than half of the organisations participating highlighted current 'legislation and regulation' (72%) as first choice, closely followed by 'lack of available business support' (68%); whilst competition from larger providers (0%) and lack of funding for qualifications and training (4%) remain challenges to only a minor group of outdoor organisations.

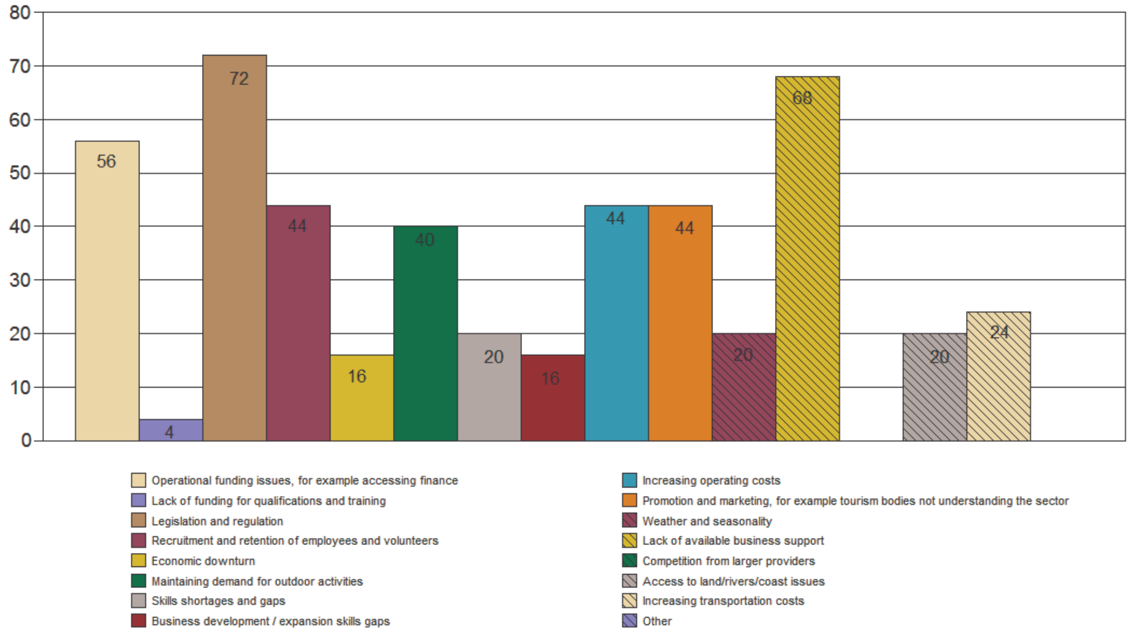



Figure 44: Main challenges facing organisation (EL)

## 3.6. Hungary

### 3.6.1 General introduction[22]

From the responses received and the data collected through the CLO2 survey, this section gives a first picture of the outdoor sector in Hungary and more precisely on the key activities and services offered by outdoors organisations, the main participants for those activities, and the seasonal variations of both activities.

The Hungarian sample has been developed in 2009 and covered the private, public and not for profit (and voluntary) sectors of the outdoors. The survey was sent to more than 900 contacts, plus an unknown number of indirect contacts through outdoor organisations, which were basically membership institutions.

It has to be noted that the results analysed and highlighted in this national section do not represent the situation in Hungary but have to be considered carefully as they are based on the responses received through the survey and only represent a limited number of organisations. But for the first time, this enables a picture of the sector to be built up at the national and then European level, which is essential to promote the sector's value both nationally and within the European Community.

The following table provides an overview on general country data:

| | | |
|---|---|---|
| **Size of the country** | **93,029 km²** | Eurostat 2008 |
| **Total Population** | **10,030,975** | Eurostat 2009 |
| **Labour Force[23]** | **6,794,200** | Eurostat 2008 |
| **Active Population** | **4,185,900** | Eurostat Q1 2010 |
| **Employment Rate** | **55.4 %** | Eurostat 2009 |
| **GDP per capita in PPS[24]** | **63** | Eurostat 2009 |

Table 37: General country data (HU)

[22] Project partner from Hungary has been: Institute of Coaching and Sport Education - www.icse.hu

[23] The labour force or the economically active population includes both employed and unemployed people, but not the economically inactive, such as pre-school children, school children, students and pensioners.

[24] Gross domestic product (GDP) is a measure for the economic activity. It is defined as the value of all goods and services produced less the value of any goods or services used in their creation. The volume index of GDP per capita in Purchasing Power Standards (PPS) is expressed in relation to the European Union (EU-27) average set to equal 100. If the index of a country is higher than 100, this country's level of GDP per head is higher than the EU average and vice versa. Basic figures are expressed in PPS, i.e. a common currency that eliminates the differences in price levels between countries allowing meaningful volume comparisons of GDP between countries. Please note that the index, calculated from PPS figures and expressed with respect to EU27 = 100, is intended for cross-country comparisons rather than for temporal comparisons.

### 3.6.2 Key data and facts for Hungary

**SURVEY KEY DATA AND FACTS:**

- From Hungary 34 outdoor organisations have participated in the EU outdoors survey (32 responded in Hungarian and 2 in English language)
- The profile of organisations participating in this survey from Hungary was about half and half commercial / private organisations (41%) and not-for-profit, or voluntary or charitable organisations (44%).
- Nearly all of those outdoor organisations in Hungary have less than 50 permanent members of staff. Overall 87% of the organisations were micro businesses (with one to ten permanent and seasonal employees).
- Around 48.4% of the outdoor organisations from Hungary employ paid staff and around 84.4% have some volunteers; 48% of the organisations operated entirely on volunteers.
- Outdoor organisations from Hungary report a range from 30 participants/ members to an excess of 50.000 per year, whilst the Median is 260 and the arithmetic mean (average) is 2.875 participants (members).
- 69.7% of outdoor organisations deliver services to families.
- Around 48.5% of outdoor organisations deliver services to schools plus another 54.5% to children independent of school or family.
- About one third of the Hungarian outdoor organisations deliver services to adults only.
- The Hungarian outdoors sector is subject to seasonal variation.
- The height of the outdoors season in Hungary is April to September.
- The least busy season in Hungary is November to February.
- The ‘economic downturn’ (63.6%) as first choice, closely followed by ‘increasing operating costs’ (57.6%) and ‘weather and seasonality’ (54.5%) are mentioned as major challenges for the outdoors sector in Hungary.

### 3.6.3 Type of organisations

Organisations in Hungary include a mix of not-for-profit / voluntary organisations, commercial / private operators, or public organisations / local authorities, whilst replies in this survey were mostly split from the for-profit sector and non-for-profit sector:

- 41% are commercial organisation (private for profit)
- 44% are not for profit, or voluntary or charitable organisation

No replies were received from any public organisation (local authority, school centre etc.).

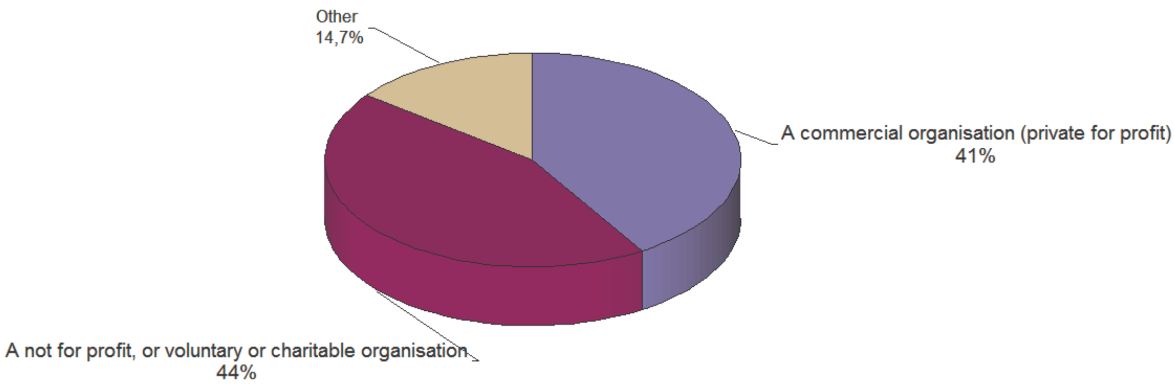



Figure 45: Organisation type (HU)

### 3.6.4 Type of employment and characteristics of the workforce (paid/unpaid)

Overall, 34 outdoors organisations completed the Outdoors Survey from Hungary. All of those outdoor organisations from Hungary (n=31) have less than 50 permanent and seasonal members of staff. Overall app 87% of the organisations was micro businesses, employing between one and ten members of permanent and seasonal staff. Considering permanent staff only, 97% of the organisations would be rated as micro business.

Overall around 48.4% of organisations in Hungary identified that they currently employ paid staff and around 84.4% currently had volunteer staff. Further analysis reveals that 48% of organisations operated entirely on volunteers, 12% operated entirely on paid employees and app. three per cent was sole practitioners. Overall, 36.4 % of organisations had a mixture of paid staff and volunteers.

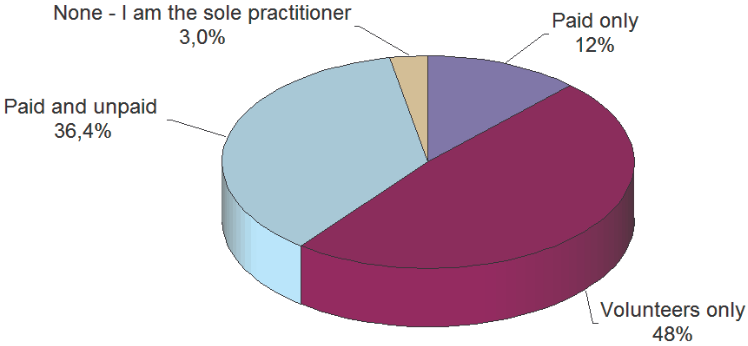



Figure 46: Employment type (HU)

The Hungarian outdoor employers which filled the survey identified that they currently employed around 481 people in total (including volunteers); 150 of members of paid staff. Overall, 88 of paid employees worked in a permanent position and 62 on seasonal basis. 82 were self employed/ freelancers and 249 were working on a voluntary basis.

### 3.6.5 The workforce: gender and age splits

The following two figures show the workforce situation split by gender and age:

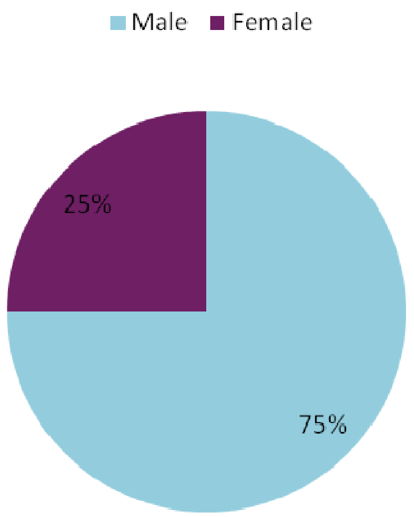



Figure 47: Workforce – gender split (HU)

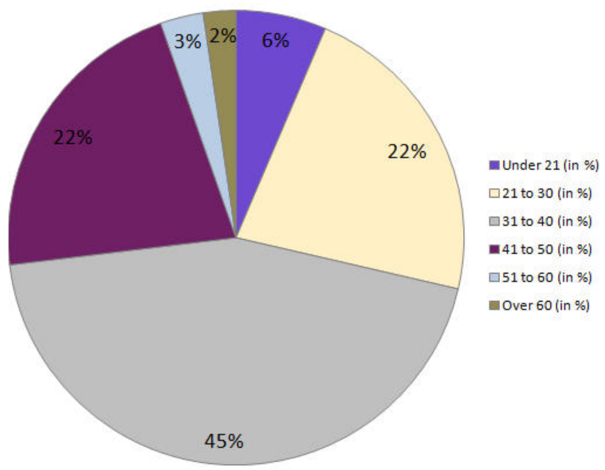



Figure 48: Workforce – age split (HU)

### 3.6.6 Type of employment split per type of organisation

The following figure indicates the employment type split by the type of organisations:

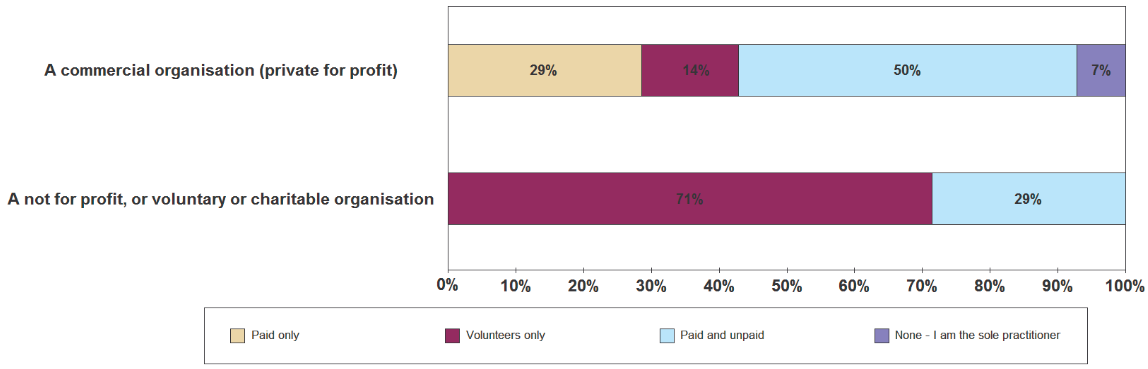



Figure 49: Employment type split per type of organisation in % (HU)

### 3.6.7 Outdoor organisation's offering

From the responses received, it seems that the most common service offered in Hungary is quite equally split between outdoor recreation (53.1% of organisations) followed by outdoor sport development (46.9%) and outdoor education (43.8%). The following figure provides an overview of all services offered by the Hungary organisations (multiple choices possible). The category 'other' included the services of therapeutic horseback riding and services to sport clubs.

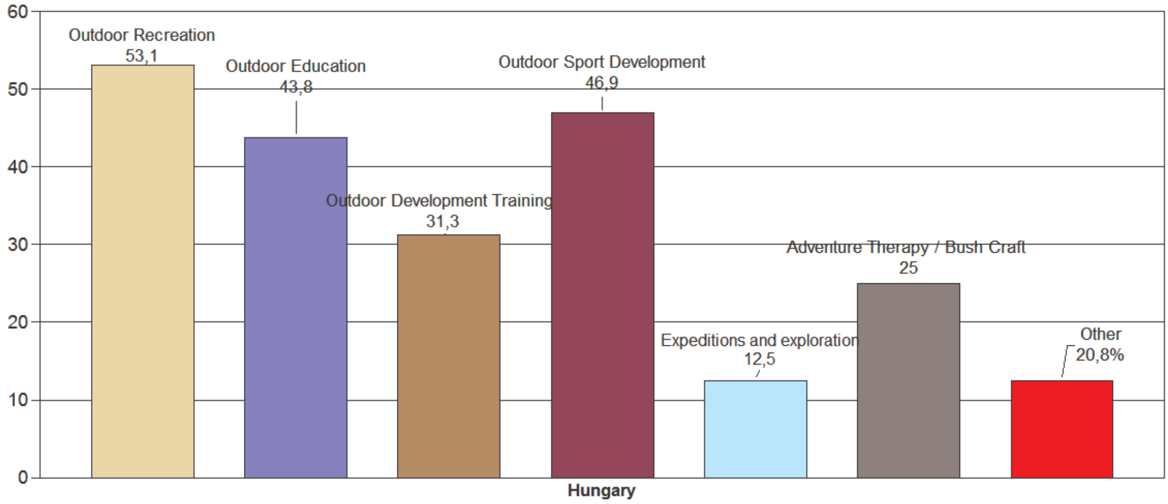



Figure 50: The outdoors service offer (HU)

### 3.6.8 Outdoor organisation's activities

The following tables highlight all activities offered by Hungarian organisations in the different categories which are Air, Snow, Lakes & Sea, River and Earth. The results are split if delivered by own staff or by a sub-contractor (multiple choices possible):

**AIR**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 6 | 16,7% | 83,3% |
| Hot air balloon | 2 | - | 100,0% |
| Paragliding | 1 | 100,0% | - |
| Parapenting | - | - | - |
| Parachuting | 3 | - | 100,0% |
| ULM | - | - | - |

Table 38: Activities by outdoor service offer – AIR (HU)

**SNOW**

| Analysis % Respondents | Total | | |
|---|---|---|---|
| | | Delivered by your staff | Delivered by a sub-contractor |
| Base | 20 | 90,0% | 15,0% |
| Skiing (Alpine) | 3 | 66,7% | 33,3% |
| Skiing (Cross Country) | - | - | - |
| Snow Boarding | 2 | 50,0% | 50,0% |
| Snow shoes trekking | 1 | 100,0% | - |
| Mountaineering | 8 | 100,0% | 12,5% |
| Snow mobile (motor) | 1 | 100,0% | - |
| Telemark skiing | - | - | - |
| Ski trekking | 3 | 100,0% | - |
| Kick sledding | - | - | - |
| Musher | - | - | - |
| Ice fishing | 1 | 100,0% | - |
| Ice skating | - | - | - |
| Sledging | 1 | 100,0% | - |
| Kite skiing | - | - | - |
| Ski joering (horse) | - | - | - |

Table 39: Activities by outdoor service offer – SNOW (HU)

**LAKES AND SEA**

| Analysis % Respondents | Total | | |
|---|---|---|---|
| | | Delivered by your staff | Delivered by a sub-contractor |
| Base | 11 | 90,9% | 9,1% |
| Board surfing | - | - | - |
| Body board surfing | - | - | - |
| Canoeing / Kayaking / Sea Kayaking | 2 | 100,0% | - |
| Diving | 5 | 100,0% | - |
| Sailing | 2 | 50,0% | 50,0% |
| Water skiing/wake boarding | - | - | - |
| Wind surfing | - | - | - |
| Beach games | 2 | 100,0% | - |
| Buggy sailing | - | - | - |
| Fishing (Deep sea) | - | - | - |
| Parasailing | - | - | - |
| Jet ski | - | - | - |
| Kite surf | - | - | - |

Table 40: Activities by outdoor service offer –LAKES & SEA (HU)

## RIVER

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 7 | 71,4% | 28,6% |
| Rafting | 2 | 50,0% | 50,0% |
| Canoeing | 3 | 66,7% | 33,3% |
| Kayaking | 1 | 100,0% | - |
| Hydro speed | - | - | - |
| Rapid swimming | - | - | - |
| Fishing | 1 | 100,0% | - |

Table 41: Activities by outdoor service offer – RIVER (HU)

## EARTH

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 82 | 74,4% | 28,0% |
| Hiking / Hill walking | 11 | 100,0% | - |
| Nordic walk | 2 | 100,0% | - |
| Nature discovery | 1 | 100,0% | - |
| Orienteering | 2 | 100,0% | - |
| ATB biking | 1 | 100,0% | - |
| Cycling | 1 | 100,0% | - |
| Quad | 5 | 60,0% | 40,0% |
| Roller skating | - | - | - |
| 4x4 | 4 | 50,0% | 50,0% |
| Horse riding | 7 | 85,7% | 42,9% |
| Abseiling | 2 | 100,0% | - |
| Canyoning | 1 | 100,0% | - |
| Caving | 5 | 40,0% | 60,0% |
| High ropes parks | 4 | 25,0% | 75,0% |
| Rock climbing | 6 | 83,3% | 16,7% |
| Via Ferrata | 3 | 100,0% | - |
| Bungee jumping | - | - | - |
| Archery | 11 | 63,6% | 36,4% |
| Paint Ball | 7 | 57,1% | 42,9% |
| Shooting activities | 5 | 60,0% | 40,0% |
| Challenge courses | 4 | 100,0% | - |

Table 42: Activities by outdoor service offer – EARTH (HU)

App 44% of the organisations identify that they offer 'other services' than mentioned above:

- Sailplane
- Special army and police leadership, communication and co-operation trainings (in order to help decision making processes)
- Scuba-diving, diving, industrial diving, underwater filming
- Fishing
- Motorcycling,
- CSR team-building
- Archery
- Insurance
- Horse-riding
- Pony horse-riding, summer horse-riding camps
- Army and police trainings
- Renting and transporting canoe and other equipments for water sports, organising and leading kayak and canoe tours
- Therapeutic horseback riding
- Mountain-climbing, trainings
- Rafting, white-water kayaking trainings, organising trips

### 3.6.9 Outdoor organisation's type of participants

The level of participation in all those activities showed a significant variation, ranging from 30 participants/ members to in excess of 50.000 per year, whilst the Median is 260 participants (members) and the arithmetic mean (average) is 2.875 participants (members).

The following figure shows the main participant groups (with multiple choices possible) in percent. Those mentioned as main participant groups under 'other' was sport club members.

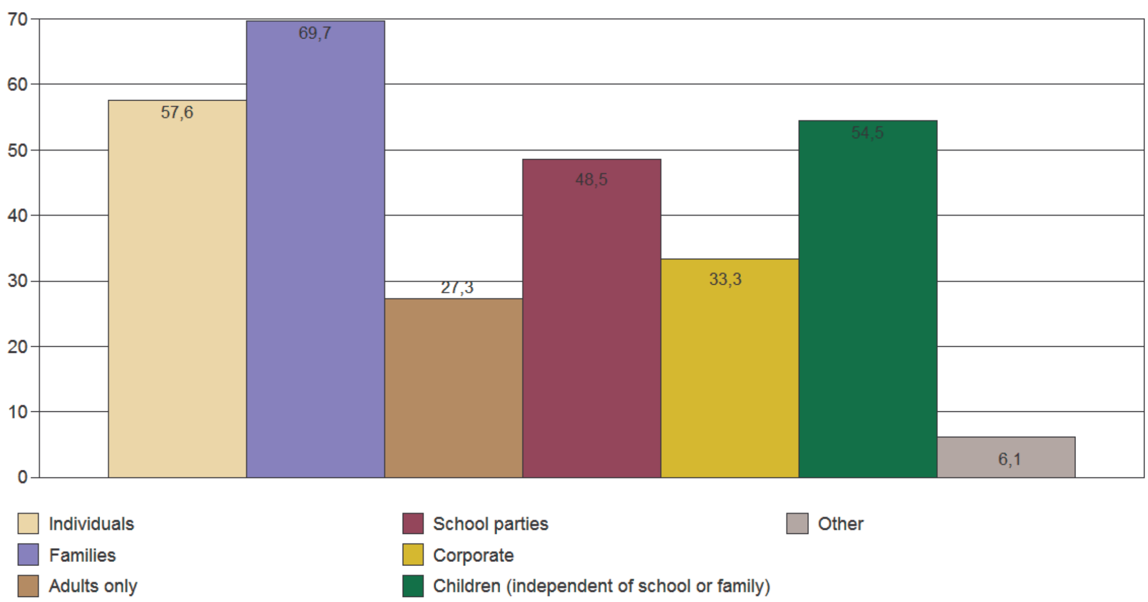



Figure 51: Main participants (HU)

### 3.6.10 Outdoor organisation's seasonality

The figure below shows that from the responses received through the survey the outdoors industry in Hungary is subject to seasonal variation. Between 71% and 87.1% of responding organisations from Hungary identified the main high demand seasons from April to September, whilst peaks were experienced in May and June. The winter months of November to February (reaching into March) appear to be the least busy ones for Hungarian outdoors organisations. The most common months for closure were December and January.

| Analysis % Respondents | Total | High season | Low season | Closed - no activities offered |
|---|---|---|---|---|
| Base | 357 | 56,3% | 31,7% | 12,0% |
| January | 28 | 21,4% | 35,7% | 42,9% |
| February | 29 | 24,1% | 41,4% | 34,5% |
| March | 29 | 31,0% | 55,2% | 13,8% |
| April | 31 | 71,0% | 29,0% | - |
| May | 32 | 84,4% | 15,6% | - |
| June | 31 | 87,1% | 12,9% | - |
| July | 30 | 80,0% | 20,0% | - |
| August | 27 | 77,8% | 22,2% | - |
| September | 32 | 81,3% | 18,8% | - |
| October | 32 | 59,4% | 40,6% | - |
| November | 27 | 25,9% | 51,9% | 22,2% |
| December | 29 | 20,7% | 41,4% | 37,9% |

Table 43: Seasonal variation (HU)

### 3.6.11 Outdoor organisation's main challenges

In regards of key challenges facing outdoors organisations in Hungary more than half of the organisations participating highlighted the current 'economic downturn' (63.6%) as first choice, closely followed by 'increasing operating costs' (57.6%) and 'weather and seasonality' (54.5%); whilst 'skills shortages and gaps' (0%) and 'maintaining demand for outdoor activities' (3%) remain challenges to only a minor group of outdoor organisations. A challenge mentioned under 'other' is buying new technical equipment.

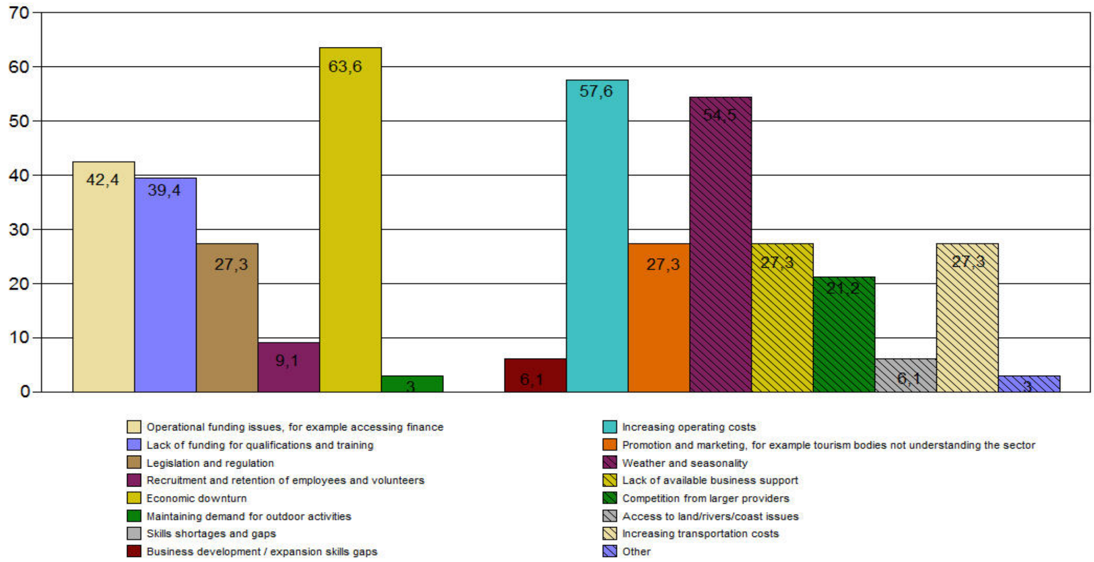



Figure 52: Main challenges facing organisation (HU)

# Ireland

### 3.7.1 General introduction[25]

From the responses received and the data collected through the CLO2 survey, this section gives a first picture of the outdoor sector in Ireland and more precisely on the key activities and services offered by outdoors organisations, the main participants for those activities, and the seasonal variations of both activities.

The sample for the survey was developed by the Institute of Technology Tralee, and was composed of a variety of organisations from the Outdoors. The questionnaire was then disseminated to that sample plus an unknown number of indirect contacts through Irish outdoor networks.

It has to be noted that the results analysed and highlighted in this national section do not represent the situation in Ireland but have to be considered carefully as they are based on the responses received through the survey and only represent a limited number of organisations. But for the first time, this enables a picture of the sector to be built up at the national and then European level, which is essential to promote the sector's value both nationally and within the European Community.

The following table provides an overview on general country data:

| | | |
|---|---|---|
| **Size of the country** | **70,273 km²** | Eurostat 2008 |
| **Total Population** | **4,312,526** | Eurostat 2007 |
| **Labour Force[26]** | **3,040,800** | Eurostat 2008 |
| **Active Population** | **2,067,400** | Eurostat Q1 2010 |
| **Employment Rate** | **61.8 %** | Eurostat 2009 |
| **GDP per capita in PPS[27]** | **131** | Eurostat 2009 |

Table 44: General country data (IE)

[25] Project partner from Ireland has been: Institute of Technology, Tralee - www.itt.ie

[26] The labour force or the economically active population includes both employed and unemployed people, but not the economically inactive, such as pre-school children, school children, students and pensioners.

[27] Gross domestic product (GDP) is a measure for the economic activity. It is defined as the value of all goods and services produced less the value of any goods or services used in their creation. The volume index of GDP per capita in Purchasing Power Standards (PPS) is expressed in relation to the European Union (EU-27) average set to equal 100. If the index of a country is higher than 100, this country's level of GDP per head is higher than the EU average and vice versa. Basic figures are expressed in PPS, i.e. a common currency that eliminates the differences in price levels between countries allowing meaningful volume comparisons of GDP between countries. Please note that the index, calculated from PPS figures and expressed with respect to EU27 = 100, is intended for cross-country comparisons rather than for temporal comparisons.

### 3.7.2 Key data and facts for Ireland

**KEY DATA AND FACTS FROM THE SURVEY:**

- From Ireland 20 outdoor organisations have participated in the EU outdoors survey (all responded in English language)
- The profile of organisations participating in this survey from Ireland was nearly all commercial / private organisations (90%), with 10% not-for-profit, or voluntary or charitable organisations and no reply from public organisations such as local authorities.
- Most of those outdoor organisations from Ireland have less than 50 permanent members of staff. Overall app 61% of the organisations was micro businesses (with one to ten permanent and seasonal employees).
- Around 89.1% of outdoor organisations from Ireland employ paid staff and around 21.1% have some volunteers; none of the organisations operated entirely on volunteers.
- Outdoor organisations from Ireland report a range from 20 participants/ members to an excess of 40.000 per year, whilst the Median is 650 and the arithmetic mean (average) is 4,500 participants (members).
- 60% of outdoor organisations deliver services to families.
- Around 45% of outdoor organisations deliver services to schools plus another 45% to children independent of school or family.
- 40% of the Irish outdoor organisations deliver services to adults only.
- The Irish outdoors sector is subject to seasonal variation.
- The height of the outdoors season in Ireland is May to September with high peaks from June to August.
- The least busy season in Ireland is October to April.
- The 'increasing operating costs' and 'weather and seasonality' (both 65%) as first choice, closely followed by the current 'economic downturn' (60%) are mentioned as major challenges for the outdoors sector in Ireland.

### 3.7.3 Type of organisations

Organisations in Ireland include a mix of not-for-profit / voluntary organisations, commercial / private operators, or public organisations / local authorities, whilst replies in this survey were mainly all coming from the for-profit sector:

- 90% are commercial organisation (private for profit)
- 10% are not for profit, or voluntary or charitable organisation

No replies were received from any public organisation (local authority, school centre etc.).

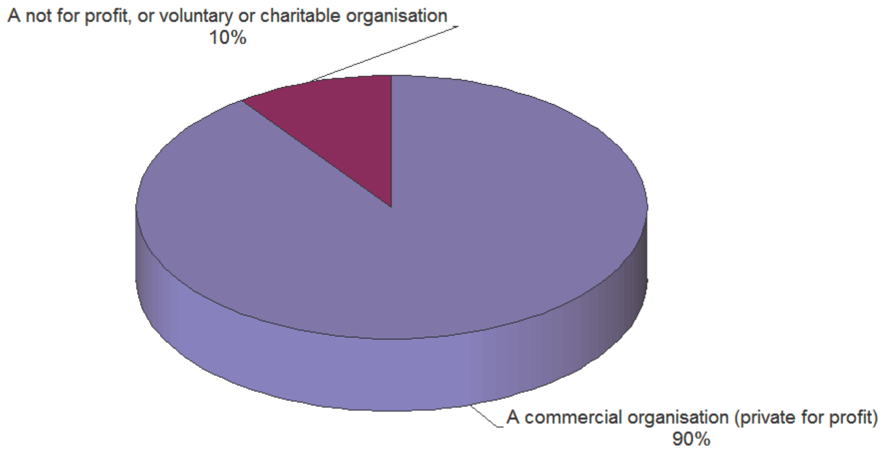



Figure 53: Organisation type (IE)

### 3.7.4 Type of employment and characteristics of the workforce (paid/unpaid)

Overall, 20 outdoors organisations completed the Outdoors Survey from Ireland. Nearly all (except one) of those outdoor organisations in Ireland have less than 50 permanent and seasonal members of staff. Overall (n=18) app 61% of the organisations was micro businesses, employing between one and ten members of permanent and seasonal staff. Considering permanent staff only, app 89% of the organisations would be rated as micro business.

Overall around 89.1% of organisations in Ireland identified that they currently employ paid staff and around 21.1% currently include volunteer staff. Further analysis reveals that none of the organisations operated entirely on volunteers, 68% operated entirely on paid employees and 10.5% were sole practitioners. Overall, 21.1% of organisations had a mixture of paid staff and volunteers.

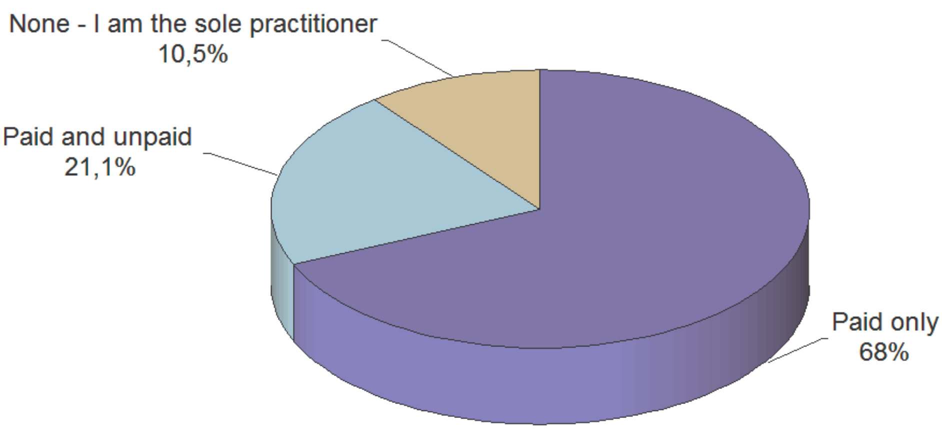



Figure 54: Employment type (IE)

The Irish outdoor employers which filled the survey identified that they currently employed around 289 people in total (including volunteers); 209 of members of paid staff. Overall, 77 of paid employees worked in a permanent position and 132 on seasonal basis. 31 were self employed/ freelancers and 49 were working on a voluntary basis.

### 3.7.5 The workforce: gender and age splits

The following two figures show the workforce situation split by gender and age:

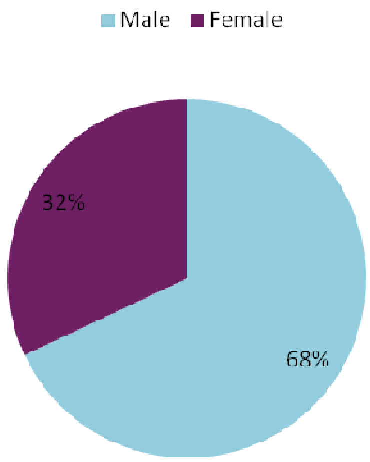



Figure 55: Workforce – gender split (IE)

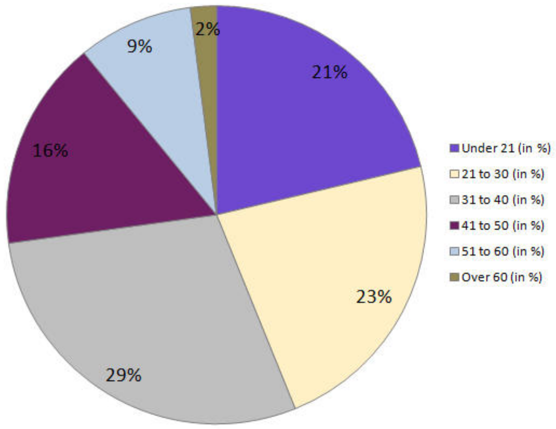



Figure 56: Workforce – age split (IE)

### 3.7.6 Type of employment split per type of organisation

The following figure indicates the employment type split by the type of organisations from which the replies were received:

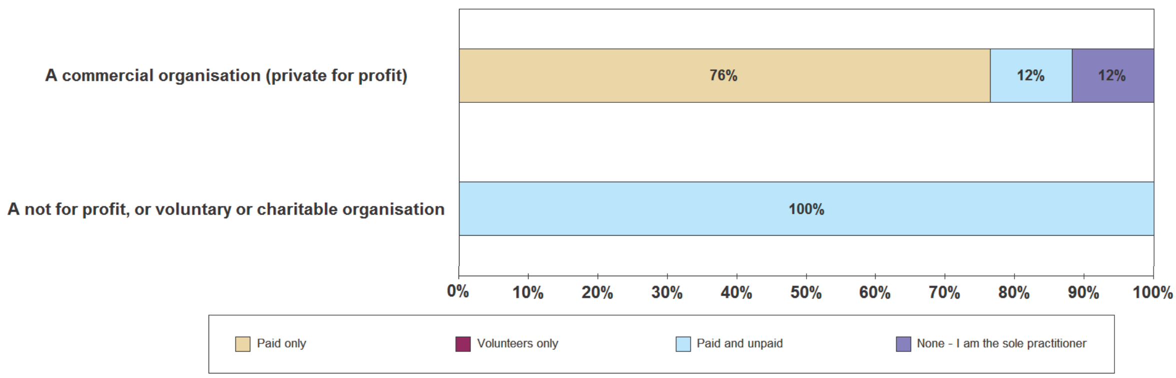



Figure 57: Employment type split per type of organisation in % (IE)

### 3.7.7 Outdoor organisation's offering

From the responses received, it seems that the most common service offered in Ireland is outdoor recreation (70% of organisations) followed by outdoor education (55%). The following figure provides an overview of all services offered by the Ireland organisations (multiple choices possible). The category 'other' included boat trips on the Shannon River as a service.

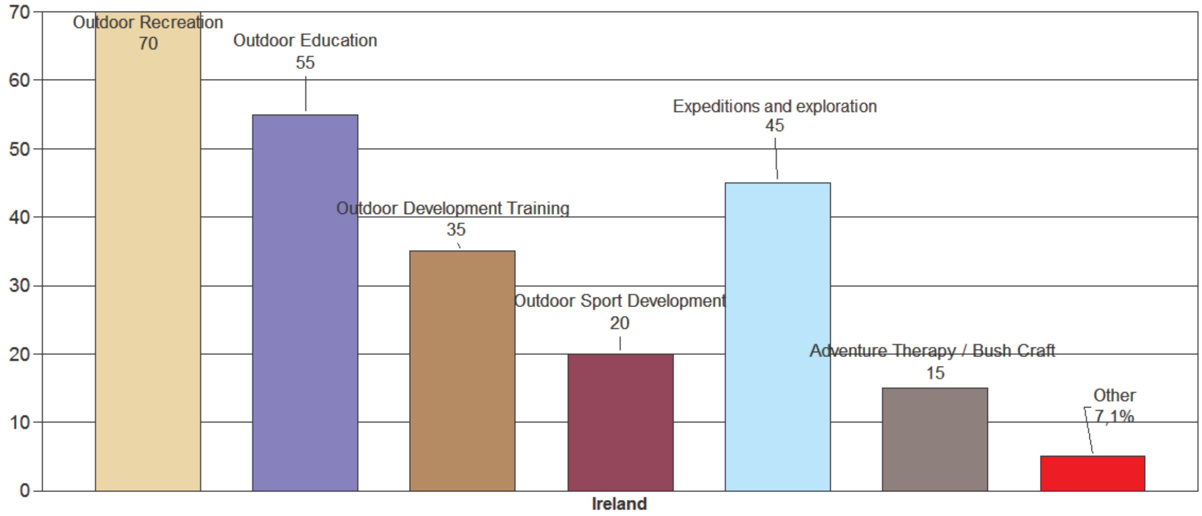



Figure 58: The outdoors service offer (IE)

### 3.7.8 Outdoor organisation's activities

The following tables highlight all activities offered by Irish organisations in the different categories which are Air, Snow, Lakes & Sea, River and Earth. The results are split if delivered by own staff or by a sub-contractor (multiple choices possible):

**AIR**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | - | - | - |
| Hot air balloon | - | - | - |
| Paragliding | - | - | - |
| Parapenting | - | - | - |
| Parachuting | - | - | - |
| ULM | - | - | - |

Table 45: Activities by outdoor service offer – AIR (IE)

**SNOW**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 2 | 50,0% | 50,0% |
| Skiing (Alpine) | - | - | - |
| Skiing (Cross Country) | - | - | - |
| Snow Boarding | - | - | - |
| Snow shoes trekking | - | - | - |
| Mountaineering | 2 | 50,0% | 50,0% |
| Snow mobile (motor) | - | - | - |
| Telemark skiing | - | - | - |
| Ski trekking | - | - | - |
| Kick sledding | - | - | - |
| Musher | - | - | - |
| Ice fishing | - | - | - |
| Ice skating | - | - | - |
| Sledging | - | - | - |
| Kite skiing | - | - | - |
| Ski joering (horse) | - | - | - |

Table 46: Activities by outdoor service offer – SNOW (IE)

**LAKES AND SEA**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 32 | 93,8% | 6,3% |
| Board surfing | 2 | 100,0% | - |
| Body board surfing | 3 | 100,0% | - |
| Canoeing / Kayaking / Sea Kayaking | 5 | 100,0% | - |
| Diving | 4 | 75,0% | 25,0% |
| Sailing | 5 | 100,0% | - |
| Water skiing/wake boarding | 2 | 100,0% | - |
| Wind surfing | 2 | 100,0% | - |
| Beach games | 2 | 100,0% | - |
| Buggy sailing | 1 | 100,0% | - |
| Fishing (Deep sea) | 4 | 100,0% | - |
| Parasailing | - | - | - |
| Jet ski | - | - | - |
| Kite surf | 2 | 50,0% | 50,0% |

Table 47: Activities by outdoor service offer –LAKES & SEA (IE)

**RIVER**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 12 | 75,0% | 25,0% |
| Rafting | - | - | - |
| Canoeing | 2 | 50,0% | 50,0% |
| Kayaking | 6 | 83,3% | 16,7% |
| Hydro speed | 1 | 100,0% | - |
| Rapid swimming | - | - | - |
| Fishing | 3 | 66,7% | 33,3% |

Table 48: Activities by outdoor service offer – RIVER (IE)

**EARTH**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 42 | 83,3% | 28,6% |
| Hiking / Hill walking | 8 | 87,5% | 37,5% |
| Nordic walk | - | - | - |
| Nature discovery | 7 | 85,7% | 28,6% |
| Orienteering | 4 | 75,0% | 25,0% |
| ATB biking | - | - | - |
| Cycling | 1 | 100,0% | - |
| Quad | 1 | - | 100,0% |
| Roller skating | - | - | - |
| 4x4 | - | - | - |
| Horse riding | 1 | 100,0% | - |
| Abseiling | 3 | 100,0% | - |
| Canyoning | 1 | - | 100,0% |
| Caving | - | - | - |
| High ropes parks | 1 | 100,0% | - |
| Rock climbing | 4 | 75,0% | 50,0% |
| Via Ferrata | - | - | - |
| Bungee jumping | 1 | 100,0% | - |
| Archery | 3 | 66,7% | 33,3% |
| Paint Ball | - | - | - |
| Shooting activities | 4 | 100,0% | - |
| Challenge courses | 3 | 100,0% | 33,3% |

Table 49: Activities by outdoor service offer – EARTH (IE)

70% of the organisations identify that they offer 'other services' than mentioned above:

- Outdoor environmental conservation education
- Power boating and Motor boating
- Whale watching, sight seeing
- Seabird watching, Mammal watching, Island tours of historical, ancient religious and geological interest.
- Team Building Challenges
- Shore based courses in Navigation and VHF radio licences, Meteorology.
- Childcare Athletics Football Badminton Tennis Crazy Golf Indoor Soccer Indoor Bowls Outdoor Bowls
- dolphin watching boat tour
- Horse & Carriage Tours of Killarney National Parklands- Lake Cruise on Killarney's largest lake - Open Boat Tours- Tour Guiding
- Mountain Skills Navigation Training courses for Expedition Skills & Camp Craft Teambuilding
- Cultural & Heritage Tours, Cook & Walk Weekends, Go as You please tours
- Marine Education: Sea Safety, Rock pool Exploration, Field Studies on crabs & their habitats, Beach Discovery Hike, Beachcombing, Certificate of completion
- Charter hire & day trips
- Whale & Dolphin watching

### 3.7.9 Outdoor organisation's type of participants

The level of participation in all those activities showed a significant variation, ranging from 20 participants/ members to in excess of 40.000 per year, whilst the Median is 650 participants (members) and the arithmetic mean (average) is 4,500 participants (members).

The following figure shows the main participant groups (with multiple choices possible) in percent. Amongst those mentioned as main participant groups under 'other' clubs and boat squads were mentioned.

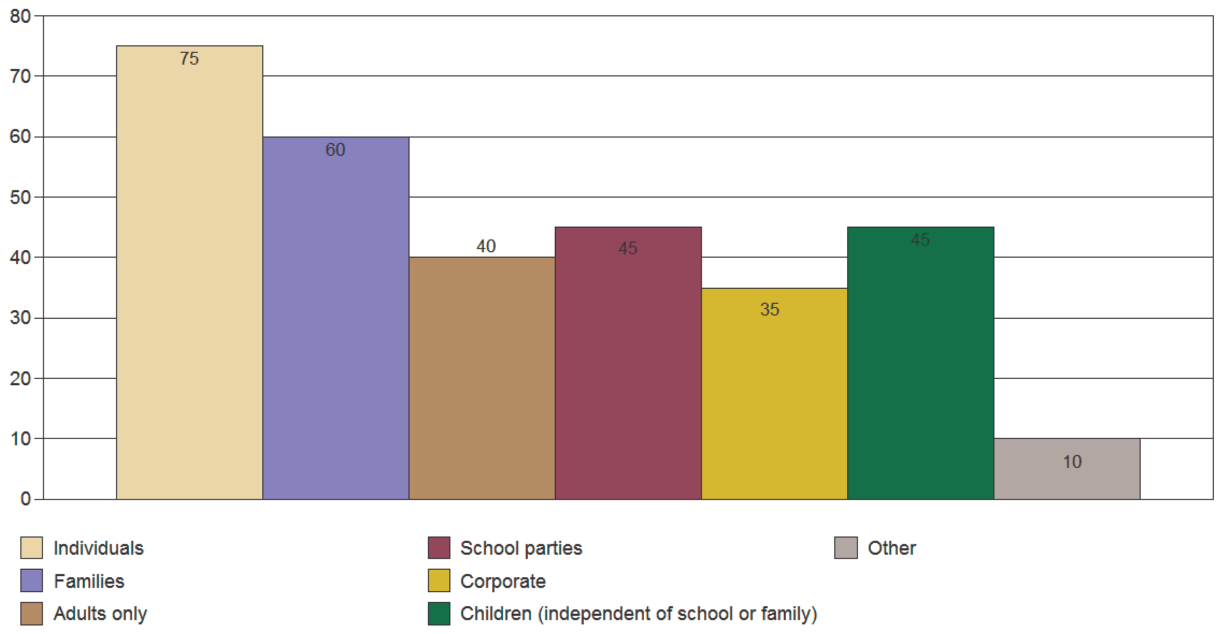



Figure 59: Main participants (IE)

### 3.7.10 Outdoor organisation's seasonality

The figure below shows that from the responses received through the survey the outdoors industry in Ireland is subject to seasonal variation. Between 68.8% and 75% of responding organisations from Ireland identified the main high demand seasons staring from May until September, with peaks experienced from June and August (95%). The winter months of October to April appear to be the least busy ones for Irish outdoors organisations. The most common month for closure is January.

| Analysis % Respondents | Total | High season | Low season | Closed - no activities offered |
|---|---|---|---|---|
| Base | 221 | 48,9% | 46,2% | 5,0% |
| January | 16 | 25,0% | 43,8% | 31,3% |
| February | 16 | 18,8% | 68,8% | 12,5% |
| March | 18 | 11,1% | 88,9% | - |
| April | 20 | 25,0% | 75,0% | - |
| May | 19 | 73,7% | 26,3% | - |
| June | 20 | 95,0% | 5,0% | - |
| July | 20 | 95,0% | 5,0% | - |
| August | 20 | 95,0% | 5,0% | - |
| September | 20 | 60,0% | 40,0% | - |
| October | 20 | 25,0% | 75,0% | - |
| November | 16 | 18,8% | 68,8% | 12,5% |
| December | 16 | 18,8% | 68,8% | 12,5% |

Table 50: Seasonal variation (IE)

### 3.7.11 Outdoor organisation's main challenges

In regards of key challenges facing outdoors organisations in Ireland more than half of the organisations participating highlighted current 'increasing operating costs' and 'weather and seasonality' (both 65%) as first choice, closely followed by the current 'economic downturn' (60%); whilst especially 'recruitment and retention of employees and volunteers' and 'skills shortages and gaps' (both 0%) do not seem to be challenges to Irish outdoor organisations.

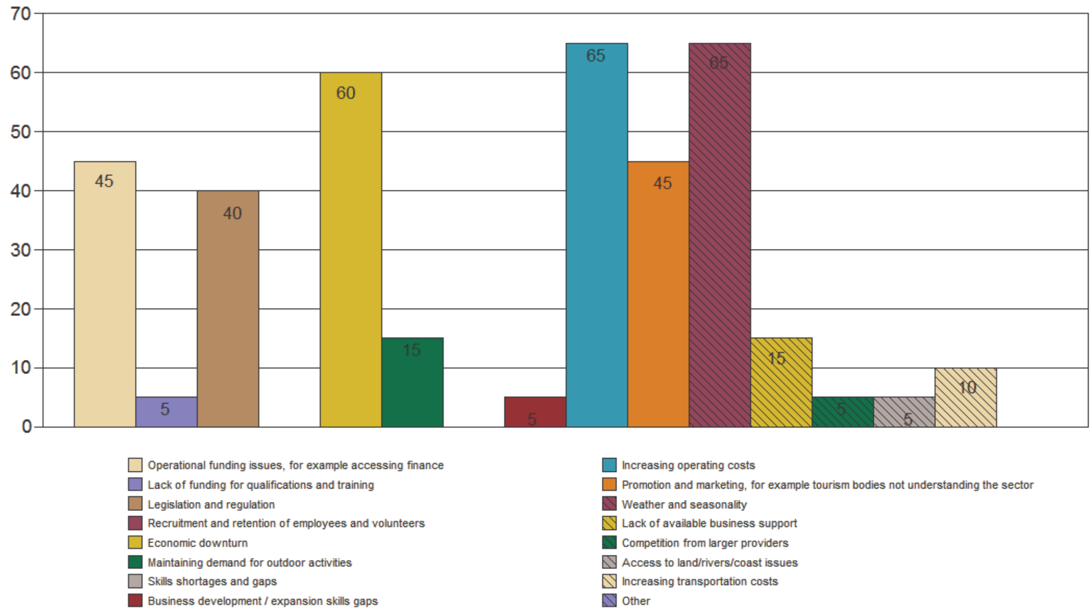



Figure 60: Main challenges facing organisation (IE)

## 3.7. Lithuania

### 3.8.1 General introduction[28]

From the responses received and the data collected through the CLO2 survey, this section gives a first picture of the outdoor sector in Lithuania and more precisely on the key activities and services offered by outdoors organisations, the main participants for those activities, and the seasonal variations of both activities.

The questionnaire was sent to 720 Lithuanian outdoor organisations and covers the public, non-governmental and private sectors. The database was composed using two main sources of information: from national tourism system and sport clubs.

It has to be noted that the results analysed and highlighted in this national section do not represent the situation in Lithuania but have to be considered carefully as they are based on the responses received through the survey and only represent a limited number of organisations. But for the first time, this enables a picture of the sector to be built up at the national and then European level, which is essential to promote the sector's value both nationally and within the European Community.

The following table provides an overview on general country data:

| | | |
|---|---|---|
| **Size of the country** | **65,300 km²** | Eurostat 2008 |
| **Total Population** | **3,329,039** | Eurostat 2010 |
| **Labour Force[29]** | **2,316,100** | Eurostat 2008 |
| **Active Population** | **1,598,400** | Eurostat Q2 2010 |
| **Employment Rate** | **60.1 %** | Eurostat 2009 |
| **GDP per capita in PPS[30]** | **53** | Eurostat 2009 |

Table 51: General country data (LT)

[28] Project partner from Lithuania has been: Lithuanian Academy of Physical Education – www.lkka.lt

[29] The labour force or the economically active population includes both employed and unemployed people, but not the economically inactive, such as pre-school children, school children, students and pensioners.

[30] Gross domestic product (GDP) is a measure for the economic activity. It is defined as the value of all goods and services produced less the value of any goods or services used in their creation. The volume index of GDP per capita in Purchasing Power Standards (PPS) is expressed in relation to the European Union (EU-27) average set to equal 100. If the index of a country is higher than 100, this country's level of GDP per head is higher than the EU average and vice versa. Basic figures are expressed in PPS, i.e. a common currency that eliminates the differences in price levels between countries allowing meaningful volume comparisons of GDP between countries. Please note that the index, calculated from PPS figures and expressed with respect to EU27 = 100, is intended for cross-country comparisons rather than for temporal comparisons.

### 3.8.2 Key data and facts for Lithuania

**KEY DATA AND FACTS FROM THE SURVEY:**

- From Lithuania 19 outdoor organisations have participated in the EU outdoors survey (18 responded in Lithuanian and 1 in English language)
- The profile of organisations participating in this survey from Lithuania was 58% commercial / private organisations and 42% not-for-profit, or voluntary or charitable organisations. No replies were received from public organisations such as local authorities.
- All of those outdoor organisations from Lithuania have less than 50 permanent members of staff. Overall app 84% of the organisations was micro businesses (with one to ten permanent and seasonal employees).
- Around 52.3% of outdoor organisations from Lithuania employ paid staff and around 47.3% have some volunteers; 21% of the organisations operated entirely on volunteers.
- Outdoor organisations from Lithuania report a range from 20 participants/ members to an excess of 35,000 per year, whilst the Median is 900 and the arithmetic mean (average) is 4,832 participants (members).
- 84.2% of outdoor organisations deliver services to families.
- Around 47.4% of outdoor organisations deliver services to schools plus another 73.7% to children independent of school or family.
- Only 21% of the Lithuanian outdoor organisations deliver services to adults only.
- The Lithuanian outdoors sector is subject to seasonal variation.
- The height of the outdoors season in Lithuania is May to September with a peak experienced in June.
- The less busy season in Lithuania is November to March.
- The current ‘economic downturn’ (63,2%) as first choice, closely followed by ‘weather and seasonality’ (57.9%) are mentioned as major challenges for the outdoors sector in Lithuania.

### 3.8.3 Type of organisations

Organisations in Lithuania include a mix of not-for-profit / voluntary organisations, commercial / private operators, or public organisations / local authorities, whilst replies in this survey were only from the for-profit and non-for-profit sectors:

- 58% are commercial organisation (private for profit)
- 42% are not for profit, or voluntary or charitable organisation

No replies were received from any public organisation (local authority, school centre etc.).

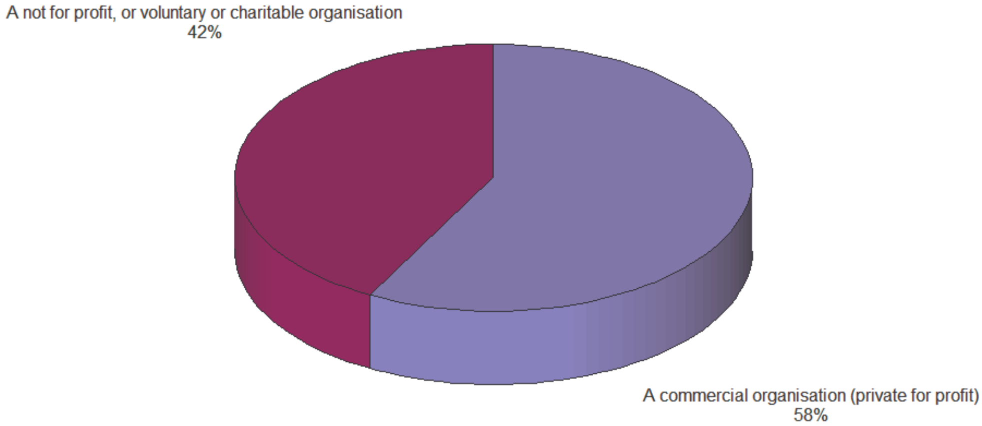



Figure 61: Organisation type (LT)

### 3.8.4 Type of employment and characteristics of the workforce (paid/unpaid)

Overall, 19 outdoors organisations completed the Outdoors Survey from Lithuania. All of those outdoor organisations in Lithuania have less than 50 permanent and seasonal members of staff. Overall app 84% of the organisations was micro businesses, employing between one and ten members of permanent and seasonal staff. Considering permanent staff only, 100% of the organisations would be rated as micro business.

Overall around 52.3% of organisations in Lithuania identified that they currently employ paid staff and around 47.3% currently had volunteer staff. Further analysis reveals that 21% of organisations operated entirely on volunteers, 26% operated entirely on paid employees and app. 26.3% was sole practitioners. Overall, 26.3% of organisations had a mixture of paid staff and volunteers.

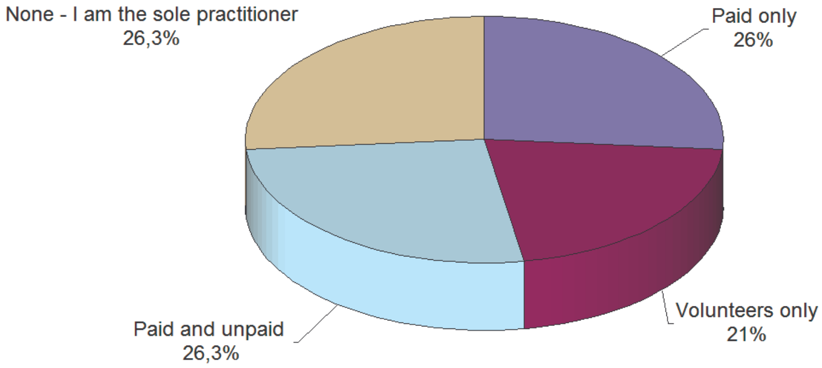



Figure 62: Employment type (LT)

The Lithuanian outdoor employers which filled the survey identified that they currently employed around 240 people in total (including volunteers); 103 of members of paid staff. Overall, 41 of paid employees worked in a permanent position and 62 on seasonal basis. 24 were self employed/ freelancers and 113 were working on a voluntary basis.

### 3.8.5 The workforce: gender and age splits

The following two figures show the workforce situation split by gender and age:

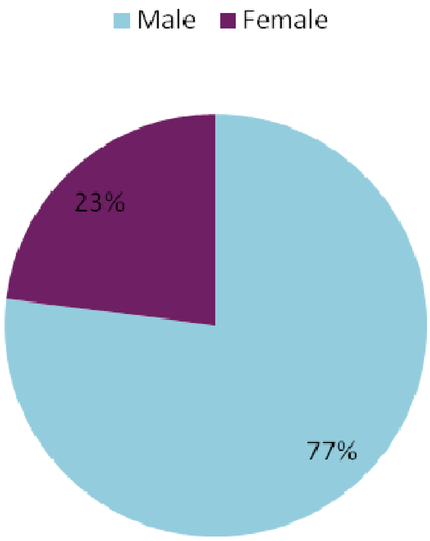



Figure 63: Workforce – gender split (LT)

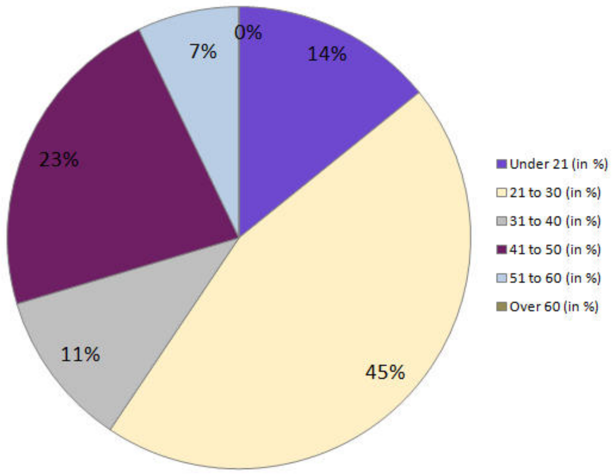



Figure 64: Workforce – age split (LT)

### 3.8.6 Type of employment split per type of organisation

The following figure indicates the employment type split by the type of organisations from which the replies were received:

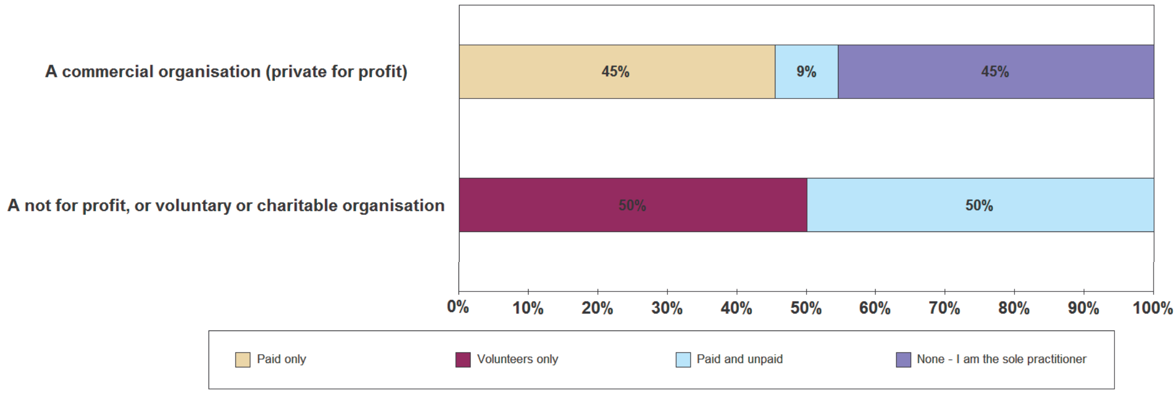



Figure 65: Employment type split per type of organisation in % (LT)

### 3.8.7 Outdoor organisation's offering

From the responses received, it seems that the most common service offered in Lithuania is outdoor recreation (68.4% of organisations) followed by outdoor sport development (63.2%). The following figure provides an overview of all services offered by the Lithuanian organisations (multiple choices possible). The category 'other' included summer recreation for children.

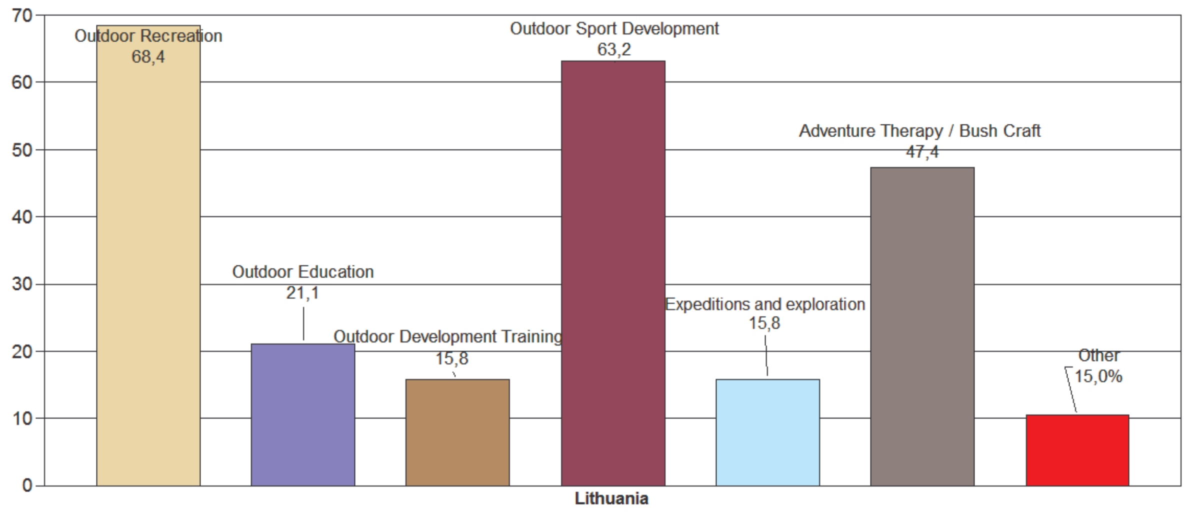



Figure 66: The outdoors service offer (LT)

### 3.8.9 Outdoor organisation's activities

The following tables highlight all activities offered by Lithuanian organisations in the different categories which are Air, Snow, Lakes & Sea, River and Earth. The results are split if delivered by own staff or by a sub-contractor (multiple choices possible):

**AIR**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 10 | 10,0% | 90,0% |
| Hot air balloon | 4 | - | 100,0% |
| Paragliding | 2 | - | 100,0% |
| Parapenting | 1 | - | 100,0% |
| Parachuting | 1 | - | 100,0% |
| ULM | 2 | 50,0% | 50,0% |

Table 52: Activities by outdoor service offer – AIR (LT)

## SNOW

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 19 | 100,0% | - |
| Skiing (Alpine) | 3 | 100,0% | - |
| Skiing (Cross Country) | 4 | 100,0% | - |
| Snow Boarding | 2 | 100,0% | - |
| Snow shoes trekking | 2 | 100,0% | - |
| Mountaineering | 1 | 100,0% | - |
| Snow mobile (motor) | - | - | - |
| Telemark skiing | - | - | - |
| Ski trekking | 1 | 100,0% | - |
| Kick sledding | - | - | - |
| Musher | - | - | - |
| Ice fishing | 1 | 100,0% | - |
| Ice skating | 2 | 100,0% | - |
| Sledging | 1 | 100,0% | - |
| Kite skiing | 2 | 100,0% | - |
| Ski joering (horse) | - | - | - |

Table 53: Activities by outdoor service offer – SNOW (LT)

## LAKES AND SEA

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 19 | 73,7% | 26,3% |
| Board surfing | - | - | - |
| Body board surfing | - | - | - |
| Canoeing / Kayaking / Sea Kayaking | 6 | 83,3% | 16,7% |
| Diving | 2 | 50,0% | 50,0% |
| Sailing | 4 | 100,0% | - |
| Water skiing/wake boarding | - | - | - |
| Wind surfing | - | - | - |
| Beach games | 3 | 66,7% | 33,3% |
| Buggy sailing | 1 | 100,0% | - |
| Fishing (Deep sea) | 2 | - | 100,0% |
| Parasailing | - | - | - |
| Jet ski | - | - | - |
| Kite surf | 1 | 100,0% | - |

Table 54: Activities by outdoor service offer –LAKES & SEA (LT)

**RIVER**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 20 | 95,0% | 15,0% |
| Rafting | 3 | 100,0% | - |
| Canoeing | 5 | 100,0% | 20,0% |
| Kayaking | 7 | 100,0% | 14,3% |
| Hydro speed | 1 | 100,0% | - |
| Rapid swimming | 1 | 100,0% | - |
| Fishing | 3 | 66,7% | 33,3% |

Table 55: Activities by outdoor service offer – RIVER (LT)

**EARTH**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 48 | 83,3% | 25,0% |
| Hiking / Hill walking | 5 | 100,0% | 20,0% |
| Nordic walk | 2 | 100,0% | - |
| Nature discovery | 4 | 75,0% | 50,0% |
| Orienteering | 5 | 60,0% | 40,0% |
| ATB biking | 1 | - | 100,0% |
| Cycling | 5 | 80,0% | 40,0% |
| Quad | 2 | 100,0% | 50,0% |
| Roller skating | 1 | 100,0% | - |
| 4x4 | 2 | 50,0% | 50,0% |
| Horse riding | 1 | 100,0% | - |
| Abseiling | 1 | 100,0% | - |
| Canyoning | 2 | 100,0% | - |
| Caving | 1 | 100,0% | - |
| High ropes parks | 2 | 100,0% | - |
| Rock climbing | 2 | 100,0% | - |
| Via Ferrata | 1 | 100,0% | - |
| Bungee jumping | 1 | 100,0% | - |
| Archery | 2 | 100,0% | - |
| Paint Ball | 4 | 100,0% | - |
| Shooting activities | 3 | 33,3% | 66,7% |
| Challenge courses | 1 | 100,0% | - |

Table 56: Activities by outdoor service offer – EARTH (LT)

App 47% of the organisations identify that they offer 'other services' than mentioned above:

- Bicycle rent
- Holiday camp
- Ice-blocker sailing
- Summer recreation for children (tourist camps), children hiking
- Sailing entertainments/attractions
- Organisation of running, orienteering and entertainment competitions
- Rent of canoes, catamarans and saunas
- All the servicers of sailing by yachts
- Indoor rock climbing

### 3.8.10 Outdoor organisation's type of participants

The level of participation in all those activities showed a significant variation, ranging from 20 participants/ members to in excess of 35.000 per year, whilst the Median is 900 participants (members) and the arithmetic mean (average) is 4,832 participants (members).

The following figure shows the main participant groups (with multiple choices possible) in percent. Amongst those mentioned as main participant groups under 'others' 'tourist groups' (different age levels) were mentioned.

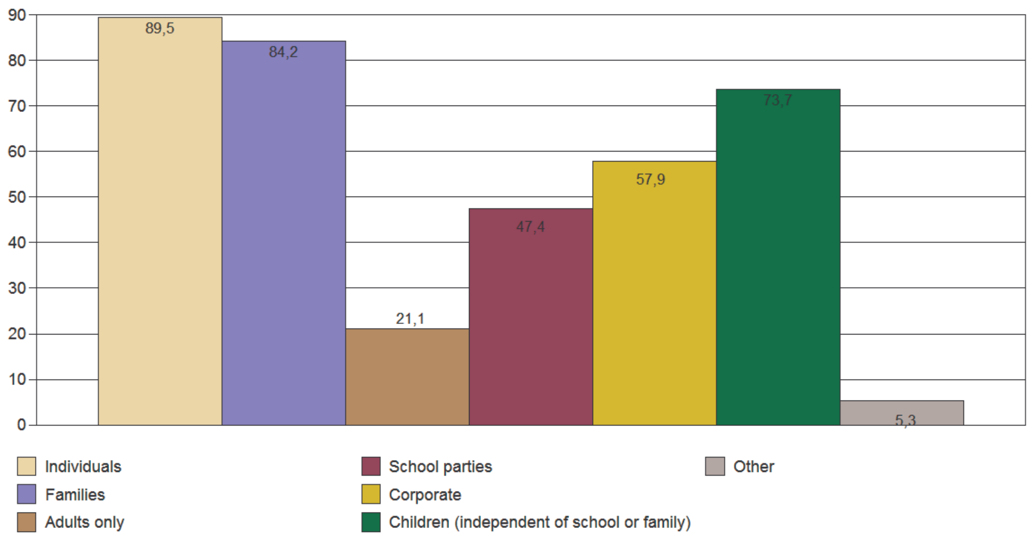



Figure 67: Main participants (LT)

### 3.8.10 Outdoor organisation's seasonality

The figure below shows that from the responses received through the survey the outdoors industry in Lithuania is subject to seasonal variation. Between 89.5% and 100% of responding organisations from Lithuania identified the main high demand seasons from May to September, whilst a peak was experienced in June (100%). The winter months of November to March appear to be the less busy ones for Lithuanian outdoors organisations. The most common month for closure was December.

| Analysis % Respondents | Total | High season | Low season | Closed - no activities offered |
|---|---|---|---|---|
| Base | 215 | 62,8% | 25,6% | 11,6% |
| January | 17 | 17,6% | 58,8% | 23,5% |
| February | 17 | 17,6% | 58,8% | 23,5% |
| March | 17 | 29,4% | 47,1% | 23,5% |
| April | 18 | 72,2% | 22,2% | 5,6% |
| May | 19 | 94,7% | 5,3% | - |
| June | 19 | 100,0% | - | - |
| July | 19 | 89,5% | 5,3% | 5,3% |
| August | 19 | 94,7% | 5,3% | - |
| September | 18 | 94,4% | 5,6% | - |
| October | 19 | 68,4% | 21,1% | 10,5% |
| November | 17 | 35,3% | 41,2% | 23,5% |
| December | 16 | 18,8% | 50,0% | 31,3% |

Table 57: Seasonal variation (LT)

### 3.8.11 Outdoor organisation's main challenges

In regards of key challenges facing outdoors organisations in Lithuania more than half of the organisations participating highlighted the current 'economic downturn' (63,2%) as first choice, closely followed by 'weather and seasonality' (57.9%); whilst 'business development' and 'competition from larger providers' (both 10.5%) remain challenges to only a minor group of outdoor organisations.

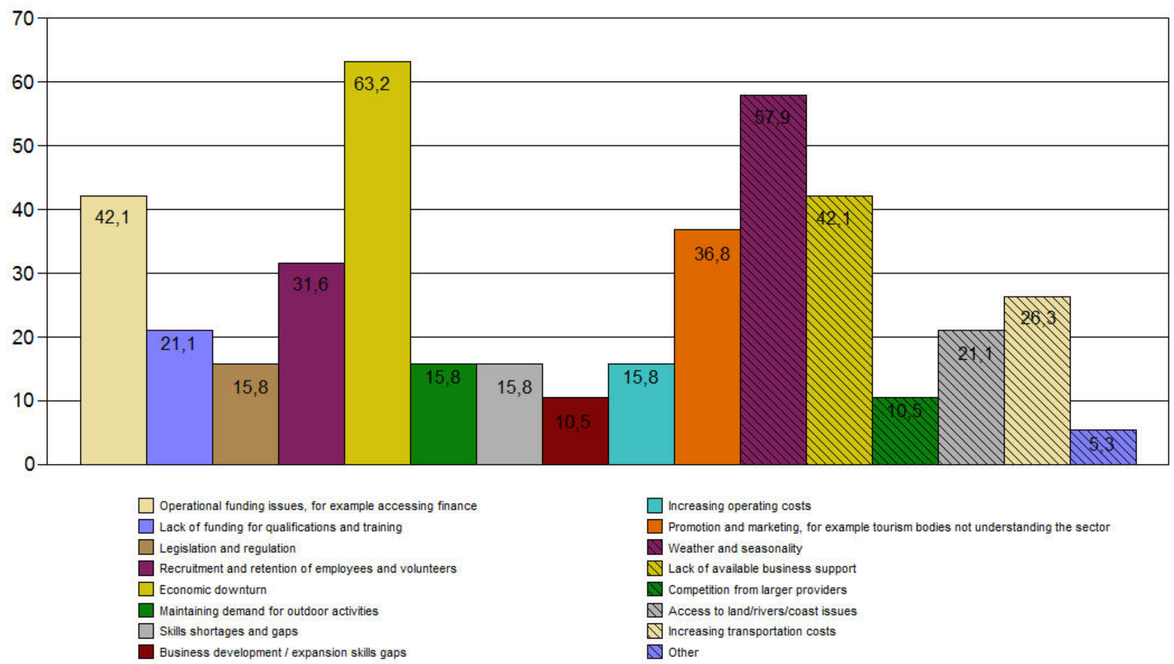



Figure 68: Main challenges facing organisation (LT)

## 3.8. The Netherlands

### 3.9.1 General introduction[31]

From the responses received and the data collected through the CLO2 survey, this section gives a first picture of the outdoor sector in the Netherlands and more precisely on the key activities and services offered by outdoors organisations, the main participants for those activities, and the seasonal variations of both activities.

The CLO2 questionnaire was sent to a sample of 300 addresses and some other indirect contacts in our outdoor network. In those addresses were 95% Dutch speaking, 4% Belgians and 1 % French speaking included. The survey was sent to schools, outdoor companies and recreation authorities in our sector. Those contacts represented a high level in the Dutch outdoor branch.

It has to be noted that the results analysed and highlighted in this national section do not represent the situation in the Netherlands but have to be considered carefully as they are based on the responses received through the survey and only represent a limited number of organisations. But for the first time, this enables a picture of the sector to be built up at the national and then European level, which is essential to promote the sector's value both nationally and within the European Community.

The following table provides an overview on general country data:

| | | |
|---|---|---|
| **Size of the country** | **33,873 km²** | Eurostat 2008 |
| **Total Population** | **16,485,787** | Eurostat 2009 |
| **Labour Force[32]** | **10,970,100** | Eurostat 2008 |
| **Active Population** | **8,748,200** | Eurostat Q2 2010 |
| **Employment Rate** | **77.0 %** | Eurostat 2009 |
| **GDP per capita in PPS[33]** | **130** | Eurostat 2009 |

Table 58: General country data (NL)

[31] Project partner from the Netherlands has been: Verening Van Buitensport Ondernemingen Nederland – www.vebon.nl

[32] The labour force or the economically active population includes both employed and unemployed people, but not the economically inactive, such as pre-school children, school children, students and pensioners.

[33] Gross domestic product (GDP) is a measure for the economic activity. It is defined as the value of all goods and services produced less the value of any goods or services used in their creation. The volume index of GDP per capita in Purchasing Power Standards (PPS) is expressed in relation to the European Union (EU-27) average set to equal 100. If the index of a country is higher than 100, this country's level of GDP per head is higher than the EU average and vice versa. Basic figures are expressed in PPS, i.e. a common currency that eliminates the differences in price levels between countries allowing meaningful volume comparisons of GDP between countries. Please note that the index, calculated from PPS figures and expressed with respect to EU27 = 100, is intended for cross-country comparisons rather than for temporal comparisons.

### 3.9.2 Key data and facts for the Netherlands

**SURVEY KEY DATA AND FACTS:**

- From the Netherlands 13 outdoor organisations have participated in the EU outdoors survey (all responded in Dutch language)
- The profile of organisations participating in this survey from the Netherlands were around 2/3 commercial / private organisations (66.7%), 30.3% not-for-profit, or voluntary or charitable organisation and only 3% public organisations such as local authorities.
- Most of those outdoor organisations (77%) from the Netherlands have less than 50 permanent members of staff. Overall app 69.2% of the organisations was micro businesses (with one to ten permanent and seasonal employees).
- Around 52.3% of outdoor organisations from the Netherlands employ paid staff and around 47.3% have some volunteers; 21% of the organisations operated entirely on volunteers.
- Outdoor organisations from the Netherlands report a range from 20 participants/ members to an excess of 100.000 per year, whilst the Median is 8,000 and the arithmetic mean (average) is 16,229 participants (members).
- 38.5% of outdoor organisations deliver services to families.
- Around 69.2% of outdoor organisations deliver services to schools plus another 38.5% to children independent of school or family.
- Less than one third of the Dutch outdoor organisations (30.8%) deliver services to adults only.
- The Dutch outdoors sector is subject to seasonal variation.
- The height of the outdoors season in the Netherlands is May to September.
- The least busy season in the Netherlands is November to March
- Operational funding issues (58.3%) as first choice, closely followed by ‘legislation and regulation’ issues (50%) are mentioned as major challenges for the outdoors sector in the Netherlands.

### 3.9.3 Type of organisations

Organisations in the Netherlands include a mix of not-for-profit / voluntary organisations, commercial / private operators, or public organisations / local authorities, whilst replies in this survey were 2/3 from the for-profit sector:

- 66,7% are commercial organisation (private for profit)
- 30,3% are not for profit, or voluntary or charitable organisation
- 3 % are public organisation (local authority, school centre etc.)

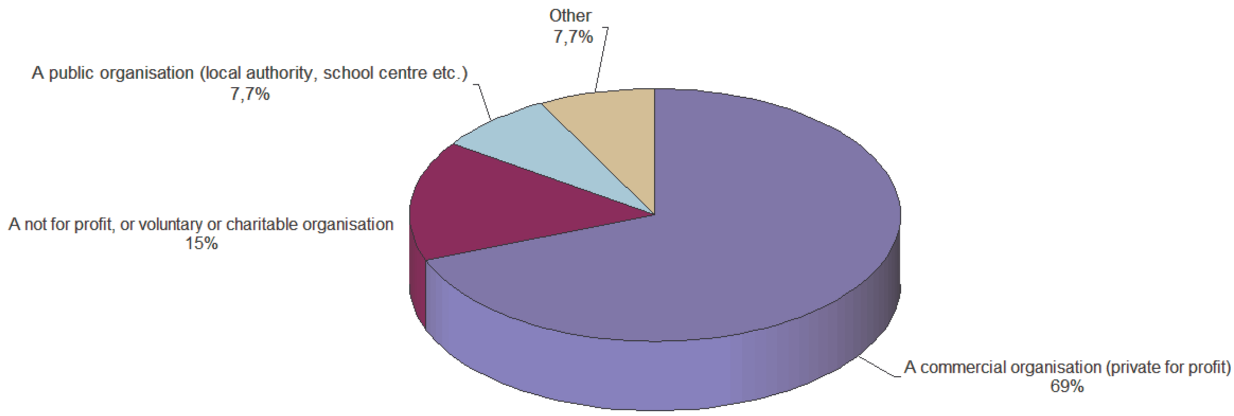



Figure 69: Organisation type (NL)

### 3.9.4 Type of employment and characteristics of the workforce (paid/unpaid)

Overall, 13 outdoors organisations completed the Outdoors Survey from the Netherlands. Nearly all (77%) of those outdoor organisations from the Netherlands have less than 50 permanent and seasonal members of staff. Overall app 69.2% of the organisations was micro businesses, employing between one and ten members of permanent and seasonal staff. Considering permanent staff only, the same percentage of the organisations would be rated as micro business (69.2%).

Overall around 52.3% of organisations in the Netherlands identified that they currently employ paid staff and around 47.3% currently had volunteer staff. Further analysis reveals that 21% of organisations operated entirely on volunteers, 26% operated entirely on paid employees and app- nine per cent were sole practitioners. Overall, 26.3% of organisations had a mixture of paid staff and volunteers.

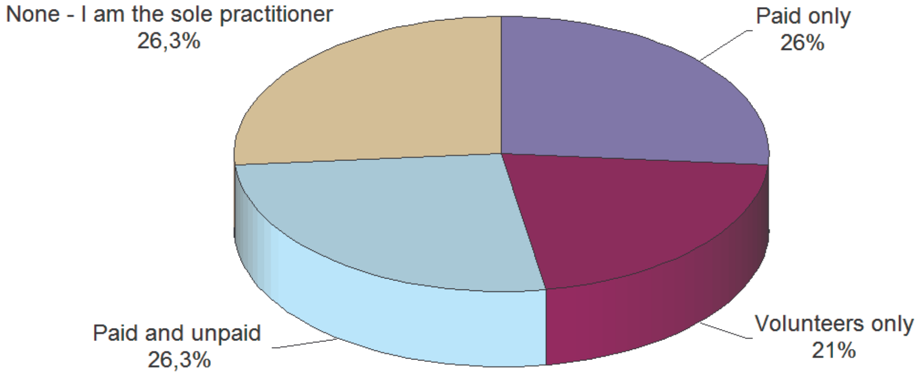



Figure 70: Employment type (NL)

The Dutch outdoor employers which filled the survey identified that they currently employed around 1,216 people in total (including volunteers); 375 of members of paid staff. Overall, 107 of paid employees worked in a permanent position and 268 on seasonal basis. 58 were self employed/ freelancers and 783 were working on a voluntary basis.

### 3.9.5 The workforce: gender and age splits

The following two figures show the workforce situation split by gender and age:

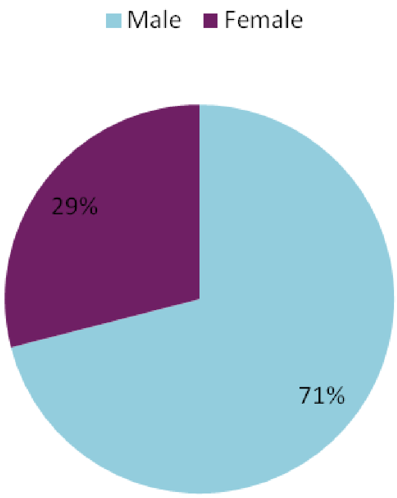



Figure 71: Workforce – gender split (NL)

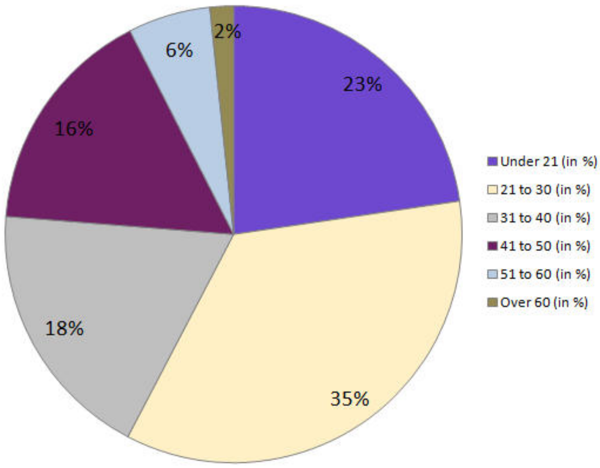



Figure 72: Workforce – age split (NL)

### 3.9.6 Type of employment split per type of organisation

The following figure indicates the employment type split by the type of organisations from which the replies were received:

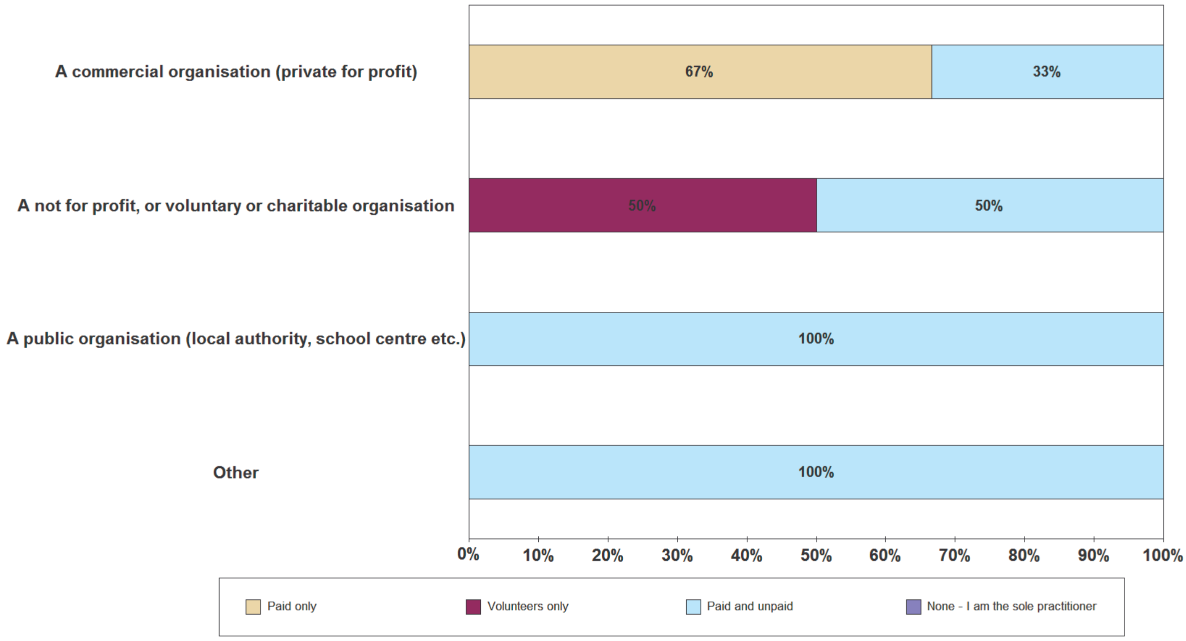



Figure 73: Employment type split per type of organisation in % (NL)

### 3.9.7 Outdoor organisation's offering

From the responses received, it seems that the most common service offered in the Netherlands is outdoor recreation (100% of organisations) followed by outdoor education (53.8%). The following figure provides an overview of all services offered by the Dutch organisations (multiple choices possible; no 'other services' added).

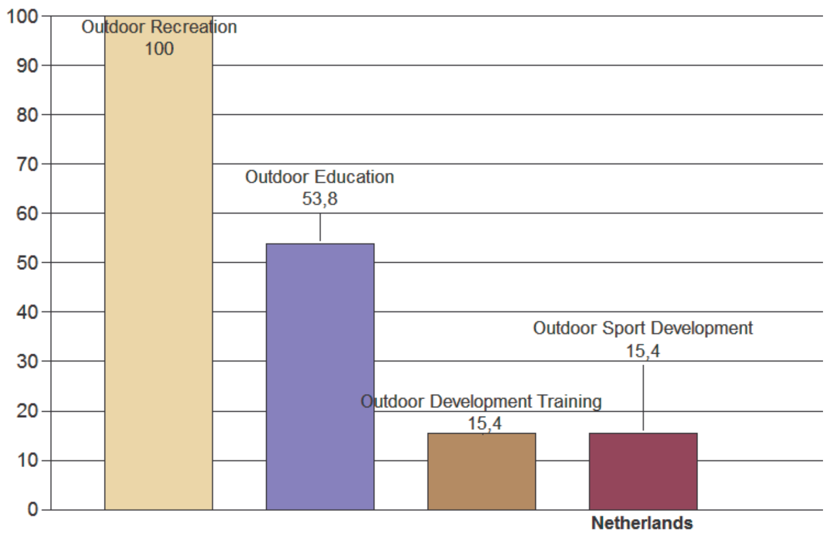



Figure 74: The outdoors service offer (NL)

### 3.9.8 Outdoor organisation's activities

The following tables highlight all activities offered by Dutch organisations in the different categories which are Air, Snow, Lakes & Sea, River and Earth. The results are split if delivered by own staff or by a sub-contractor (multiple choices possible):

**AIR**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 2 | - | 100,0% |
| Hot air balloon | 2 | - | 100,0% |
| Paragliding | - | - | - |
| Parapenting | - | - | - |
| Parachuting | - | - | - |
| ULM | - | - | - |

Table 59: Activities by outdoor service offer – AIR (NL)

**SNOW**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 11 | 81,8% | 18,2% |
| Skiing (Alpine) | 2 | 100,0% | - |
| Skiing (Cross Country) | 2 | 100,0% | - |
| Snow Boarding | 2 | 100,0% | - |
| Snow shoes trekking | 1 | 100,0% | - |
| Mountaineering | 1 | - | 100,0% |
| Snow mobile (motor) | - | - | - |
| Telemark skiing | - | - | - |
| Ski trekking | - | - | - |
| Kick sledding | - | - | - |
| Musher | 1 | - | 100,0% |
| Ice fishing | - | - | - |
| Ice skating | - | - | - |
| Sledging | 1 | 100,0% | - |
| Kite skiing | 1 | 100,0% | - |
| Ski joering (horse) | - | - | - |

Table 60: Activities by outdoor service offer – SNOW (NL)

**LAKES AND SEA**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 19 | 84,2% | 31,6% |
| Board surfing | 1 | 100,0% | 100,0% |
| Body board surfing | 1 | 100,0% | - |
| Canoeing / Kayaking / Sea Kayaking | 6 | 83,3% | 16,7% |
| Diving | - | - | - |
| Sailing | 2 | 100,0% | 50,0% |
| Water skiing/wake boarding | - | - | - |
| Wind surfing | - | - | - |
| Beach games | 4 | 100,0% | - |
| Buggy sailing | 2 | 50,0% | 50,0% |
| Fishing (Deep sea) | - | - | - |
| Parasailing | - | - | - |
| Jet ski | - | - | - |
| Kite surf | 3 | 66,7% | 66,7% |

Table 61: Activities by outdoor service offer –LAKES & SEA (NL)

**RIVER**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 17 | 88,2% | 11,8% |
| Rafting | 4 | 100,0% | - |
| Canoeing | 7 | 85,7% | 14,3% |
| Kayaking | 6 | 83,3% | 16,7% |
| Hydro speed | - | - | - |
| Rapid swimming | - | - | - |
| Fishing | - | - | - |

Table 62: Activities by outdoor service offer – RIVER (NL)

**EARTH**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 69 | 92,8% | 7,2% |
| Hiking / Hill walking | 3 | 100,0% | - |
| Nordic walk | 1 | 100,0% | - |
| Nature discovery | 1 | 100,0% | - |
| Orienteering | 7 | 100,0% | - |
| ATB biking | 7 | 100,0% | - |
| Cycling | 4 | 100,0% | - |
| Quad | 2 | - | 100,0% |
| Roller skating | 1 | 100,0% | - |
| 4x4 | 3 | 33,3% | 66,7% |
| Horse riding | 1 | - | 100,0% |
| Abseiling | 4 | 100,0% | - |
| Canyoning | - | - | - |
| Caving | 3 | 100,0% | - |
| High ropes parks | 9 | 100,0% | - |
| Rock climbing | 2 | 100,0% | - |
| Via Ferrata | 3 | 100,0% | - |
| Bungee jumping | - | - | - |
| Archery | 10 | 100,0% | - |
| Paint Ball | 2 | 100,0% | - |
| Shooting activities | 2 | 100,0% | - |
| Challenge courses | 4 | 100,0% | - |

Table 63: Activities by outdoor service offer – EARTH (NL)

App 46% of the organisations identify that they offer ‘other services’ than mentioned above:

- Downhill scootering
- Several obstacle courses
- Kick Biking. GPS and compass course, slack line, speed Minton, disc golf
- GPS tours, trips PDA, all bicycle activities, multi-activities etc together 120
- Six camp, crate stacking, working with wood and rope
- Trainer and Instructor Training for sailing, motor boating, surfing and kite surfing

### 3.9.9 Outdoor organisation’s type of participants

The level of participation in all those activities showed a significant variation, ranging from 20 participants/ members to in excess of 100,000 per year, whilst the Median is 8,000 participants (members) and the arithmetic mean (average) is 16,229 participants (members).

The following figure shows the main participant groups (with multiple choices possible) in percent. Amongst those mentioned as main participant groups in 'other' mainly bachelor parties and governmental and public organisations were mentioned.

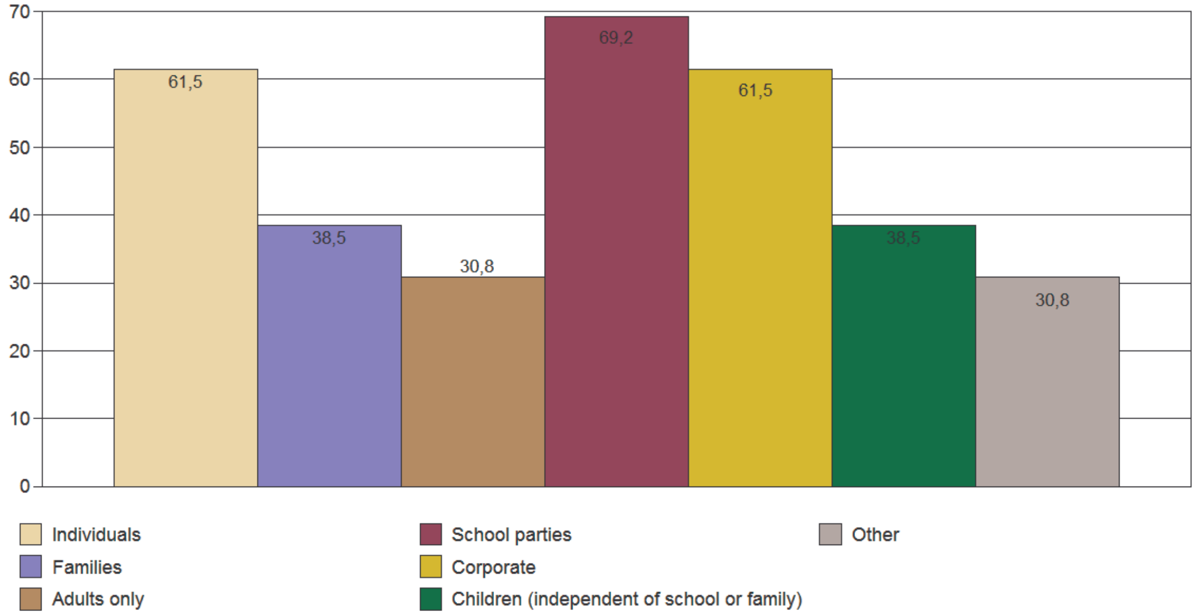



Figure 75: Main participants (NL)

### 3.9.10 Outdoor organisation's seasonality

The figure below shows that from the responses received through the survey the outdoors industry in the Netherlands is subject to seasonal variation. Between 76.9% and 100% of responding organisations from the Netherlands identified the main high demand seasons from May to September, whilst peaks were experienced in May and September (both 100%). The winter months of November to March appear to be the less busy ones for Dutch outdoors organisations. The only months for closure were December and January.

| Analysis % Respondents | Total | High season | Low season | Closed - no activities offered |
|---|---|---|---|---|
| Base | 151 | 55,6% | 43,0% | 1,3% |
| January | 12 | 16,7% | 75,0% | 8,3% |
| February | 12 | 16,7% | 83,3% | - |
| March | 12 | 25,0% | 75,0% | - |
| April | 13 | 53,8% | 46,2% | - |
| May | 13 | 100,0% | - | - |
| June | 13 | 92,3% | 7,7% | - |
| July | 13 | 76,9% | 23,1% | - |
| August | 13 | 84,6% | 15,4% | - |
| September | 13 | 100,0% | - | - |
| October | 13 | 69,2% | 30,8% | - |
| November | 12 | 8,3% | 91,7% | - |
| December | 12 | 8,3% | 83,3% | 8,3% |

Table 64: Seasonal variation (NL)

### 3.9.11 Outdoor organisation's main challenges

In regards of key challenges facing outdoors organisations in the Netherlands more than half of the organisations participating highlighted 'operational funding issues' (58.3%) as first choice, closely followed by 'legislation and regulation' issues (50%); whilst competition from larger providers (0%) seems to be no challenge to Dutch outdoor organisations. Under the category 'other', challenges such as establishing a business in the sector, competition from low-cost providers and quality staff training.

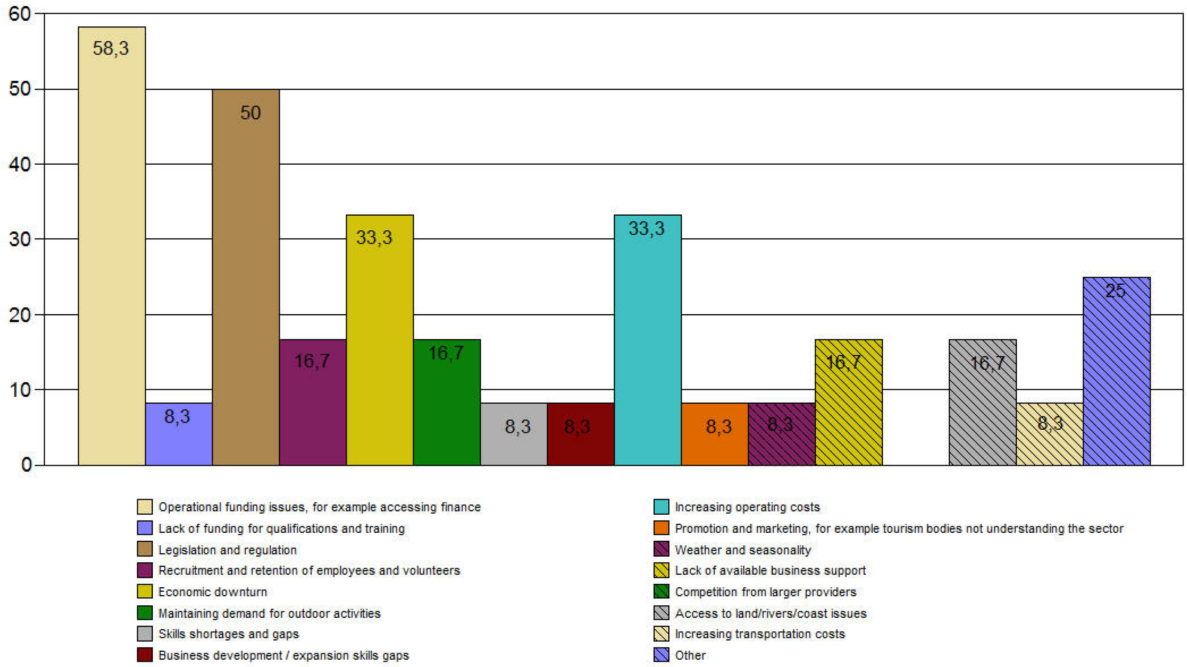



Figure 76: Main challenges facing organisation (NL)

## 3.9. Portugal

### 3.10.1 General introduction[34]

From the responses received and the data collected through the CLO2 survey, this section gives a first picture of the outdoor sector in Portugal and more precisely on the key activities and services offered by outdoors organisations, the main participants for those activities, and the seasonal variations of both activities.

The questionnaire was sent by e-mail to a sample of 533 Outdoor commercial organisations. As known, in Portugal there is a specific legislation for companies that develop Outdoor Activities and APECATE as an association that represents the sector has decided to disseminate the survey only to the companies licensed by the Governmental Entity 'Turismo de Portugal'.

It has to be noted that the results analysed and highlighted in this national section do not represent the situation in Portugal but have to be considered carefully as they are based on the responses received through the survey and only represent a limited number of organisations. But for the first time, this enables a picture of the sector to be built up at the national and then European level, which is essential to promote the sector's value both nationally and within the European Community.

The following table provides an overview on general country data:

| | | |
|---|---|---|
| **Size of the country** | **91,906 km²** | Eurostat 2008 |
| **Total Population** | **10,617,575** | Eurostat 2008 |
| **Labour Force[35]** | **7,145,100** | Eurostat 2008 |
| **Active Population** | **5,261,600** | Eurostat Q2 2010 |
| **Employment Rate** | **66.3 %** | Eurostat 2009 |
| **GDP per capita in PPS[36]** | **78** | Eurostat 2009 |

Table 65: General country data (PT)

[34] The project partner from Portugal has been: Associacão Portuguesa das Empresas de Congressos Animação Turistica e Eventos - www.apecate.pt

[35] The labour force or the economically active population includes both employed and unemployed people, but not the economically inactive, such as pre-school children, school children, students and pensioners.

[36] Gross domestic product (GDP) is a measure for the economic activity. It is defined as the value of all goods and services produced less the value of any goods or services used in their creation. The volume index of GDP per capita in Purchasing Power Standards (PPS) is expressed in relation to the European Union (EU-27) average set to equal 100. If the index of a country is higher than 100, this country's level of GDP per head is higher than the EU average and vice versa. Basic figures are expressed in PPS, i.e. a common currency that eliminates the differences in price levels between countries allowing meaningful volume comparisons of GDP between countries. Please note that the index, calculated from PPS figures and expressed with respect to EU27 = 100, is intended for cross-country comparisons rather than for temporal comparisons.

### 3.10.2 Key data and facts for Portugal

**SURVEY KEY DATA AND FACTS:**

- From Portugal 57 outdoor organisations have participated in the EU outdoors survey (all responded in Portuguese language).
- The profile of organisations participating in this survey from Portugal were mostly only from the for-profit sector (96.5%). No replies were received from not for profit, or voluntary or charitable organisations or, public organisations (local authority, school centre etc.).
- Nearly all (except one) of those outdoor organisations from Portugal have less than 50 permanent members of staff. Overall app 81% of the organisations was micro businesses (with one to ten permanent and seasonal employees).
- Around 89.1% of outdoor organisations from Portugal employ paid staff and around 29.1% have some volunteers; none of the organisations operated entirely on volunteers.
- Outdoor organisations from Portugal report a range from 2 participants/ members to an excess of 25.000 per year, whilst the Median is 600 and the arithmetic mean (average) is 2,175 participants (members).
- 51.8% of outdoor organisations deliver services to families.
- Around 33.9% of outdoor organisations deliver services to schools plus another 23.2% to children independent of school or family.
- One quarter of the Portuguese outdoor organisations deliver services to adults only.
- The Portuguese outdoors sector is subject to seasonal variation.
- The height of the outdoors season in Portugal is April to September.
- The least busy season in Portugal is November to March.
- The current ‘economic downturn’ (64.3%) as first choice, closely followed by ‘promotion and marketing’ issues (58.9%) are mentioned as major challenges for the outdoors sector in Portugal.

### 3.10.3 Type of organisations

Organisations in Portugal include a mix of not-for-profit / voluntary organisations, commercial / private operators, or public organisations / local authorities, whilst replies in this survey were mostly only from the for-profit sector (96.5%). No replies were received from not for profit, or voluntary or charitable organisations or, public organisations (local authority, school centre etc.). Under the category 'other' two organisations were mentioned: 'empresa unipessaol ida' and 'entidade empressaria municipal'.

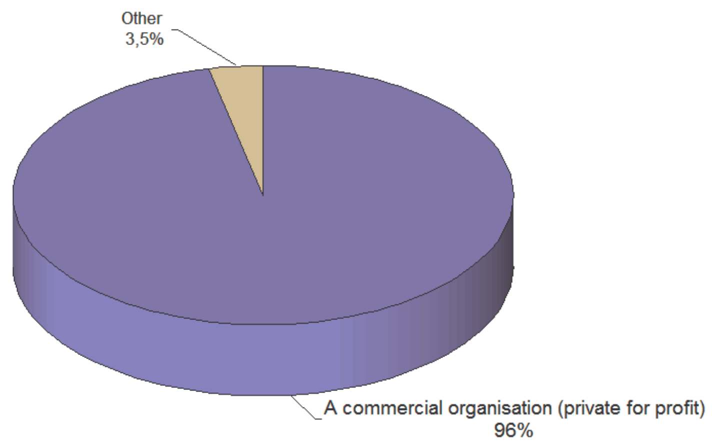



Figure 77: Organisation type (PT)

### 3.10.4 Type of employment and characteristics of the workforce (paid/unpaid)

Overall, 57 outdoors organisations completed the Outdoors Survey from Portugal. Nearly all (except one) of those outdoor organisations in Portugal have less than 50 permanent and seasonal members of staff (n=56). Overall app 81% of the organisations was micro businesses, employing between one and ten members of permanent and seasonal staff. Considering permanent staff only, 95% of the organisations would be rated as micro business.

Overall around 89.1% of organisations in Portugal identified that they currently employ paid staff and around 29.1% currently had volunteer staff. Further analysis reveals that none of the organisations operated entirely on volunteers, 60% operated entirely on paid employees and app. eleven per cent were sole practitioners. Overall, 29.1% of organisations had a mixture of paid staff and volunteers.

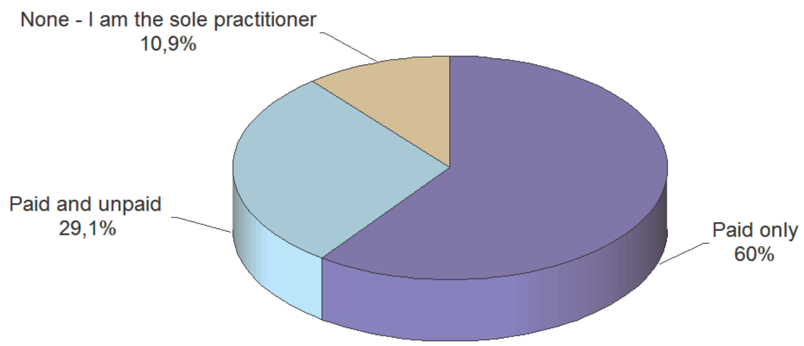



Figure 78: Employment type (PT)

The Portuguese outdoor employers which filled the survey identified that they currently employed around 1,350 people in total (including volunteers); 497 of members of paid staff. Overall, 163 of paid employees worked in a permanent position and 334 on seasonal basis. 581 were self employed/ freelancers and 272 were working on a voluntary basis.

### 3.10.5 The workforce: gender and age splits

The following two figures show the workforce situation split by gender and age:

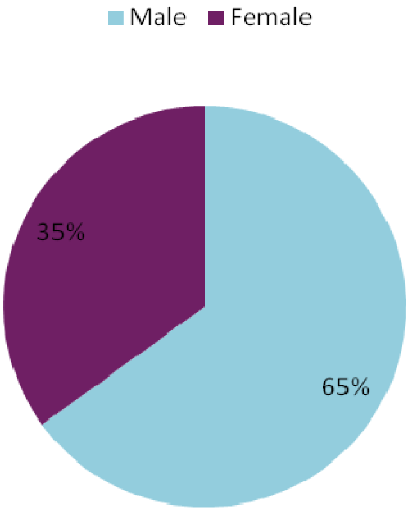



Figure 79: Workforce – gender split (PT)

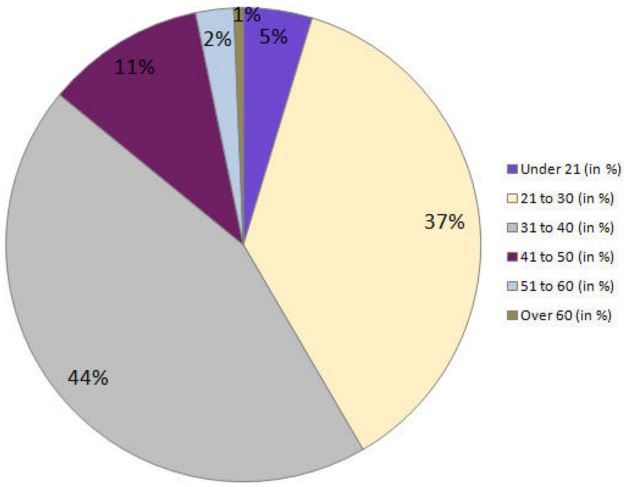



Figure 80: Workforce – age split (PT)

### 3.10.6 Type of employment split per type of organisation

The following figure indicates the employment type split by the type of organisations from which the replies were received:

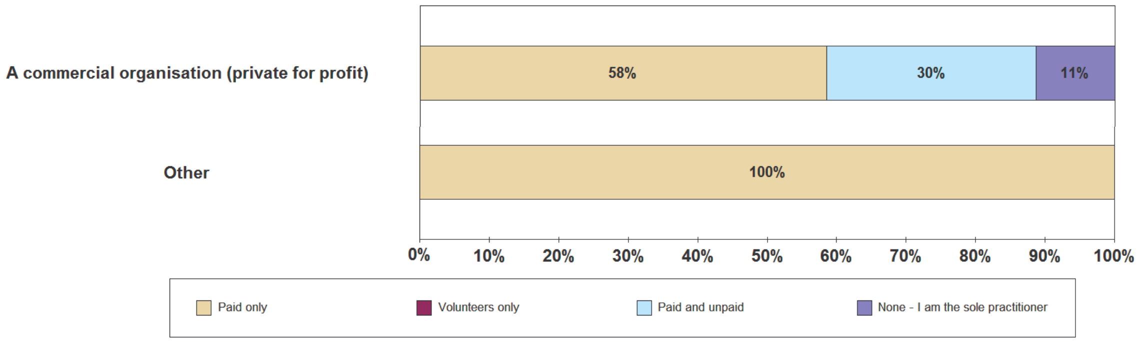



Figure 81: Employment type split per type of organisation in % (PT)

### 3.10.7 Outdoor organisation's offering

From the responses received, it seems that the most common service offered in Portugal is outdoor recreation (94.6% of organisations). The following figure provides an overview of all services offered by the Portuguese organisations (multiple choices possible). The category 'other' included services such as: Nature Tourism and conducting experiments.

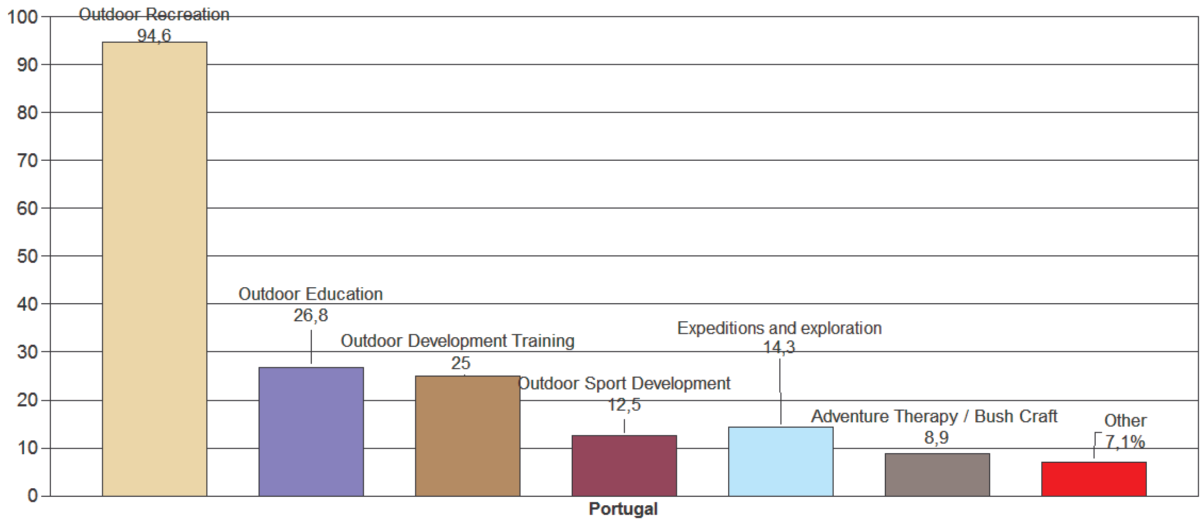



Figure 82: The outdoors service offer (PT)

### 3.10.7 Outdoor organisation's activities

The following tables highlight all activities offered by Portuguese organisations in the different categories which are Air, Snow, Lakes & Sea, River and Earth. The results are split if delivered by own staff or by a sub-contractor (multiple choices possible):

**AIR**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 33 | 15,2% | 87,9% |
| Hot air balloon | 9 | 22,2% | 77,8% |
| Paragliding | 5 | - | 100,0% |
| Parapenting | 8 | 12,5% | 87,5% |
| Parachuting | 8 | 25,0% | 87,5% |
| ULM | 3 | - | 100,0% |

Table 66: Activities by outdoor service offer – AIR (PT)

**SNOW**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 24 | 75,0% | 29,2% |
| Skiing (Alpine) | 1 | - | 100,0% |
| Skiing (Cross Country) | 1 | 100,0% | - |
| Snow Boarding | 2 | - | 100,0% |
| Snow shoes trekking | 4 | 75,0% | 25,0% |
| Mountaineering | 14 | 92,9% | 14,3% |
| Snow mobile (motor) | - | - | - |
| Telemark skiing | - | - | - |
| Ski trekking | 1 | 100,0% | - |
| Kick sledding | - | - | - |
| Musher | - | - | - |
| Ice fishing | - | - | - |
| Ice skating | - | - | - |
| Sledging | - | - | - |
| Kite skiing | - | - | - |
| Ski joering (horse) | 1 | - | 100,0% |

Table 67: Activities by outdoor service offer – SNOW (PT)

**LAKES AND SEA**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 109 | 65,1% | 39,4% |
| Board surfing | 11 | 63,6% | 36,4% |
| Body board surfing | 9 | 66,7% | 33,3% |
| Canoeing / Kayaking / Sea Kayaking | 17 | 82,4% | 23,5% |
| Diving | 13 | 53,8% | 53,8% |
| Sailing | 11 | 54,5% | 45,5% |
| Water skiing/wake boarding | 6 | 33,3% | 66,7% |
| Wind surfing | 9 | 77,8% | 22,2% |
| Beach games | 12 | 100,0% | - |
| Buggy sailing | 2 | 50,0% | 50,0% |
| Fishing (Deep sea) | 6 | 50,0% | 66,7% |
| Parasailing | 1 | - | 100,0% |
| Jet ski | 6 | 50,0% | 50,0% |
| Kite surf | 6 | 50,0% | 83,3% |

Table 68: Activities by outdoor service offer –LAKES & SEA (PT)

## RIVER

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 76 | 72,4% | 36,8% |
| Rafting | 14 | 57,1% | 50,0% |
| Canoeing | 32 | 71,9% | 37,5% |
| Kayaking | 16 | 87,5% | 18,8% |
| Hydro speed | 3 | 33,3% | 66,7% |
| Rapid swimming | 2 | 100,0% | - |
| Fishing | 9 | 77,8% | 44,4% |

Table 69: Activities by outdoor service offer – RIVER (PT)

## EARTH

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 438 | 80,1% | 23,1% |
| Hiking / Hill walking | 44 | 93,2% | 11,4% |
| Nordic walk | 1 | 100,0% | - |
| Nature discovery | 34 | 91,2% | 11,8% |
| Orienteering | 32 | 87,5% | 12,5% |
| ATB biking | 34 | 91,2% | 14,7% |
| Cycling | 21 | 100,0% | - |
| Quad | 12 | 41,7% | 58,3% |
| Roller skating | 4 | 50,0% | 50,0% |
| 4x4 | 16 | 68,8% | 31,3% |
| Horse riding | 20 | 45,0% | 65,0% |
| Abseiling | 35 | 82,9% | 17,1% |
| Canyoning | 15 | 73,3% | 46,7% |
| Caving | 12 | 66,7% | 33,3% |
| High ropes parks | 10 | 90,0% | 20,0% |
| Rock climbing | 35 | 77,1% | 22,9% |
| Via Ferrata | 8 | 87,5% | 12,5% |
| Bungee jumping | 5 | 40,0% | 60,0% |
| Archery | 33 | 84,8% | 15,2% |
| Paint Ball | 29 | 65,5% | 37,9% |
| Shooting activities | 20 | 85,0% | 15,0% |
| Challenge courses | 18 | 77,8% | 33,3% |

Table 70: Activities by outdoor service offer – EARTH (PT)

App 56% of the organisations identify that they offer 'other services' than mentioned above:

- Boating
- Bird watching Programs
- Hiking, rope tricks, BTT, Paint-ball
- Laser Tag
- Paint-ball, BTT, Rope tricks
- Diving courses, Baptisms and Scuba Diving, Hiking
- Nature Tourism
- Consulting in Outdoor activities and infrastructures
- Team Building
- Diving, Snorkelling
- Donkey rides
- Rafting, Canoeing, Cannoning, Body board, climbing, rappel, hiking, Outdoor Incentives
- All activities recognised as Tourism Nature in the Natural Park Rio Formosa
- Fresco Route Project ( Cultural Tourism, thematic routes, gastronomy, ethnology, workshops)
- Tourism Nature Activities in Algarve's protected areas
- Hiking observation and interpretation of heritage
- Multi-activity programs for business groups. Accommodation rural tourism
- Traditional activities in rural areas
- Caving
- Karting, Golf
- Traditional activities in rural areas. Stimulation of Interpretive Centres
- Horse walks on the beach, Parapenting, sailboat rides
- Coasteering
- Sporting holidays in the area of roller hockey, workshops
- Cannoning
- Rental vehicles without engine, Hiking,
- Multi activity events, themed events, Experiences boat, inflatable activities

### 3.10.9 Outdoor organisation's type of participants

The level of participation in all those activities showed a significant variation, ranging from 2 participants/ members to in excess of 25.000 per year, whilst the Median is 600 participants (members) and the arithmetic mean (average) is 2,175 participants (members).

The following figure shows the main participant groups (with multiple choices possible) in percent. Amongst those main participant groups under 'other' mainly birthday parties / hen nights, events and festivals, local chambers, university groups and friendship groups were mentioned.

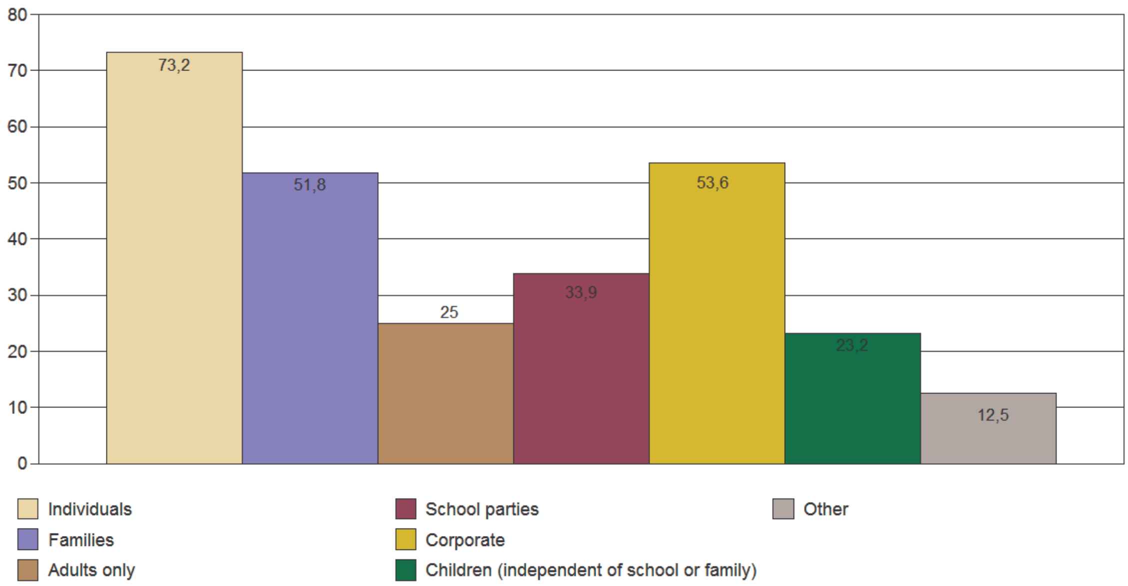



Figure 83: Main participants (PT)

### 3.10.10 Outdoor organisation's seasonality

The figure below shows that from the responses received through the survey the outdoors industry in Portugal is subject to seasonal variation. Between 61.1% and 91.1% of responding organisations from Portugal identified the main high demand seasons from April to September, whilst peaks were experienced in June and July. The winter months of November to March appear to be the less busy ones for Portuguese outdoors organisations. The most common months for closure were December and January.

| Analysis % Respondents | Total | High season | Low season | Closed - no activities offered |
|---|---|---|---|---|
| Base | 645 | 48,5% | 48,1% | 3,4% |
| January | 54 | 7,4% | 79,6% | 13,0% |
| February | 54 | 9,3% | 85,2% | 5,6% |
| March | 53 | 28,3% | 69,8% | 1,9% |
| April | 54 | 61,1% | 37,0% | 1,9% |
| May | 54 | 75,9% | 24,1% | - |
| June | 54 | 90,7% | 9,3% | - |
| July | 56 | 91,1% | 8,9% | - |
| August | 54 | 64,8% | 33,3% | 1,9% |
| September | 52 | 73,1% | 23,1% | 3,8% |
| October | 53 | 43,4% | 56,6% | - |
| November | 53 | 18,9% | 77,4% | 3,8% |
| December | 54 | 16,7% | 74,1% | 9,3% |

Table 71: Seasonal variation (PT)

### 3.10.11 Outdoor organisation's main challenges

In regards of key challenges facing outdoors organisations in Portugal more than half of the organisations participating highlighted current 'economic downturn' (64.3%) as first choice, closely followed by 'promotion and marketing' (58.9%); whilst 'business development' (10.7%) and 'increasing transportation costs' (10.7%) remain challenges to only a minor group of outdoor organisations. Under the category 'other', challenges such as unfair competition by non-licensed organisations, (unfair) competition from public and non-for-profit organisations (replies were 96% from the commercial sector) and a bureaucracy of official bodies that finance the sector were mentioned.

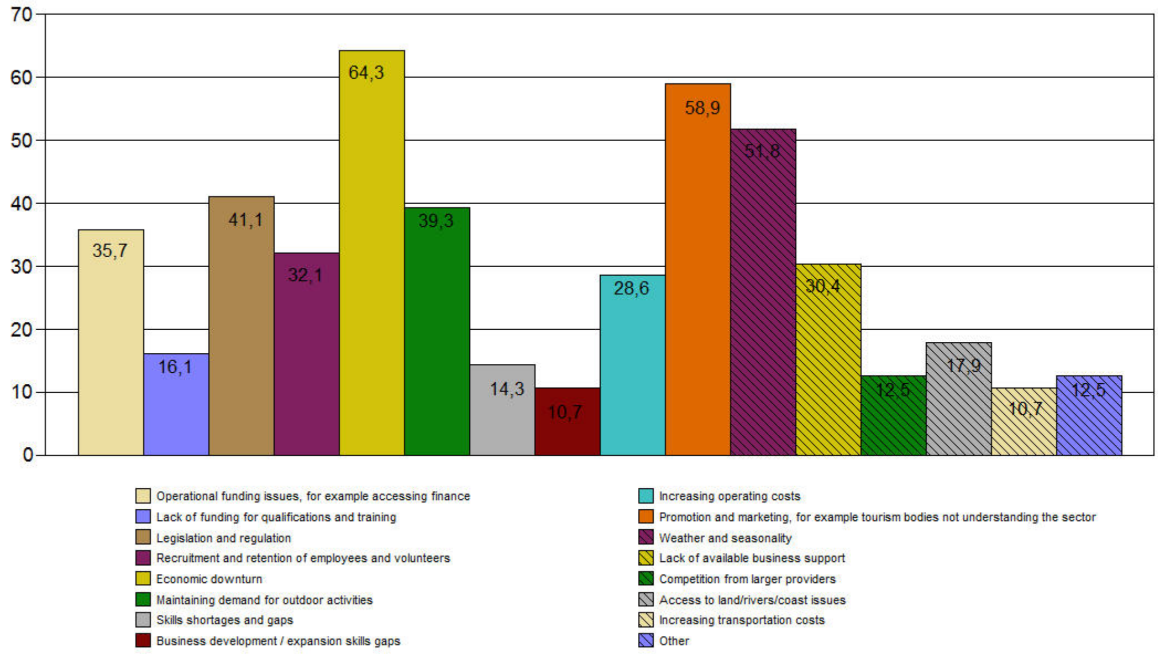



Figure 84: Main challenges facing organisation (PT)

# 3.10. United Kingdom

### 3.11.1 General introduction[37]

From the responses received and the data collected through the CLO2 survey, this section gives a first picture of the outdoor sector in the UK and more precisely on the key activities and services offered by outdoors organisations, the main participants for those activities, and the seasonal variations of both activities.

The UK sample has been developed in 2009 and covers the private, public, charitable/not for profit and voluntary sectors of the outdoors. The survey was sent to 800 contacts, plus an unknown number of indirect contacts through UK outdoor networks. Network contacts included national governing bodies, trade associations and membership institutions.

It has to be noted that the results analysed and highlighted in this national section do not represent the situation in the UK but have to be considered carefully as they are based on the responses received through the survey and only represent a limited number of organisations. But for the first time, this enables a picture of the sector to be built up at the national and then European level, which is essential to promote the sector's value both nationally and within the European Community.

The following table provides an overview on general country data:

| | | |
|---|---|---|
| **Size of the country** | **243,820 km²** | Eurostat 2004 |
| **Total Population** | **60,781,352** | Eurostat 2007 |
| **Labour Force[38]** | **40,097,500** | Eurostat 2008 |
| **Active Population** | **30,319,600** | Eurostat Q1 2010 |
| **Employment Rate** | **69.9 %** | Eurostat 2009 |
| **GDP per capita in PPS[39]** | **116** | Eurostat 2009 |

Table 72: General country data (UK)

[37] The project partner for the UK has been: SkillsActive (Promoter) – www.skillsactive.com

[38] The labour force or the economically active population includes both employed and unemployed people, but not the economically inactive, such as pre-school children, school children, students and pensioners.

[39] Gross domestic product (GDP) is a measure for the economic activity. It is defined as the value of all goods and services produced less the value of any goods or services used in their creation. The volume index of GDP per capita in Purchasing Power Standards (PPS) is expressed in relation to the European Union (EU-27) average set to equal 100. If the index of a country is higher than 100, this country's level of GDP per head is higher than the EU average and vice versa. Basic figures are expressed in PPS, i.e. a common currency that eliminates the differences in price levels between countries allowing meaningful volume comparisons of GDP between countries. Please note that the index, calculated from PPS figures and expressed with respect to EU27 = 100, is intended for cross-country comparisons rather than for temporal comparisons.

### 3.11.2 Key data and facts for the United Kingdom

**SURVEY KEY DATA AND FACTS:**

- From the UK 299 outdoor organisations have participated in the EU outdoors survey (all responded in English language)
- The profile of organisations, clubs and centres is reasonably well distributed: around a quarter is not for profit/voluntary/charitable organisations; 24% are private organisations; 22% are sole traders, freelancers or partnerships and 17% are local authority or school centres.
- Around 91% of outdoor organisations have fewer than 50 permanent members of staff. Overall 54% of organisations were micro businesses (with one to ten employees).
- Around 86% of organisations employ paid staff and around 44% have some volunteers. Around 70% of the workforce is volunteers.
- Around 25% of respondents reported between 50 and 499 participants/members use their service each year and 19% reported between 500 and 1,499 participants/members. The median average per organisation was 1,200 participants/members per year.
- 47% of outdoor organisations deliver services to families.
- Around 59% of outdoor organisations deliver services to schools. This increases to 73% of organisations for those centres offering residential facilities.
- Half of the UK outdoor organisations deliver services to adults.
- The UK outdoors sector is subject to seasonal variation.
- The height of the outdoors season in the UK is May to September.
- The least busy season in the UK is November to February.
- The current ‘legislation and regulation’ (68.7%) as first choice, closely followed by a ‘lack of funding’ (68%) and ‘increasing operating costs’ (66.7%) are mentioned as major challenges for the outdoors sector in the UK.

### 3.11.3 Type of organisations

Organisations in the UK include a mix of not-for-profit / voluntary organisations, commercial / private operators, or public organisations / local authorities, which replies well present in this survey:

- 24%  are commercial organisation (private for profit)
- 25%  are not for profit, or voluntary or charitable organisation
- 17.1% are public organisation (local authority, school centre etc.)
- 33.9% other organisations. Those included sole traders, freelancers or partnerships, or describing themselves as something else e.g. education providers and national centres/authorities.

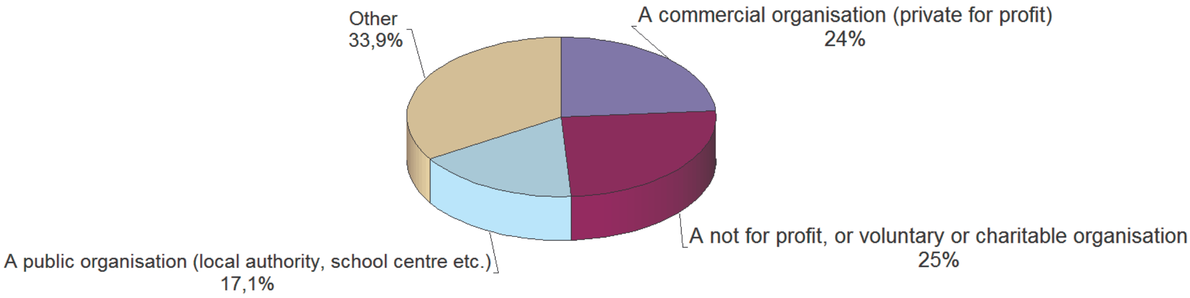



Figure 85: Organisation type (UK)

### 3.11.4 Type of employment and characteristics of the workforce (paid/unpaid)

Overall, 299 outdoors organisations completed the Outdoors Survey from the UK. Nearly all (81%) of those outdoor organisations in the UK have less than 50 permanent and seasonal members of staff. Overall app 32% of the organisations was micro businesses, employing between one and ten members of staff (inclusive of volunteers, permanent and non-permanent staff). Considering permanent staff only, 54% of the organisations would be rated as micro business.

Overall around 85.5% of organisations in the UK identified that they currently employ paid staff and around 44.5% currently had volunteer staff. Further analysis reveals that only 4% of organisations operated entirely on volunteers, 45% operated entirely on paid employees and app. ten per cent was sole practitioners. Overall, 40.5% of organisations had a mixture of paid staff and volunteers.

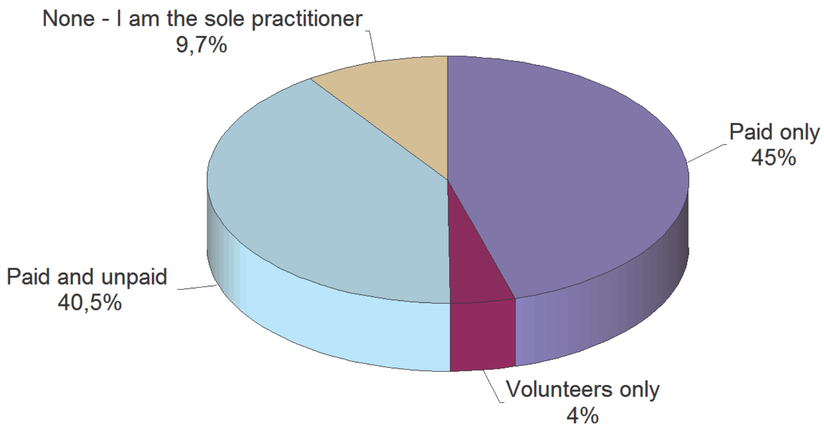



Figure: Employment type (UK)

The UK outdoor employers which filled the survey identified that they currently have around 48,800 members of staff in total; with 14,700 members of paid staff. Overall, around 46% of paid employees worked in a permanent position (6,700) and 11% were self employed/ freelancers. Over 5,700 paid members of staff (39%) worked in a seasonal capacity and four per cent were employed for the specific purpose of events/courses. Outdoors organisations also identified that they currently employed over 34,100 volunteers.

### 3.11.5 The workforce: gender split

The following figure shows the workforce situation split by gender:

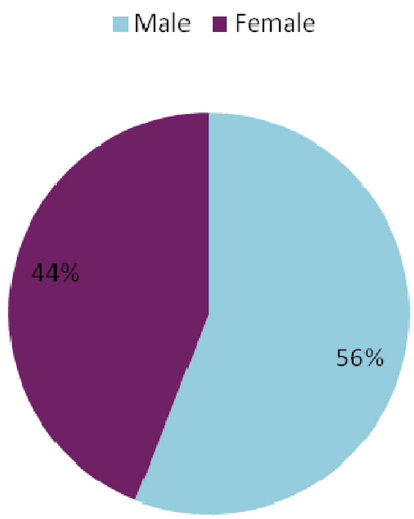



Figure 86: Workforce – gender split (UK)

### 3.11.6 Type of employment split per type of organisation

The following figure indicates the employment type split by the type of organisations from which the replies were received:

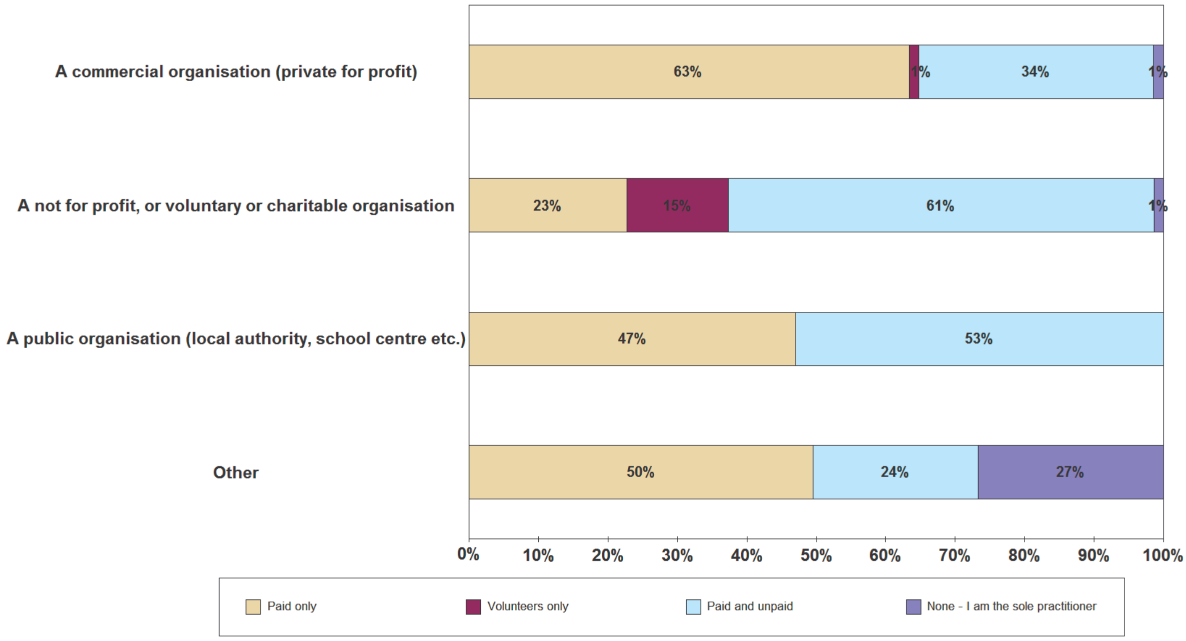



Figure 87: Employment type split per type of organisation in % (UK)

### 3.11.7 Outdoor organisation's offering

From the responses received, it seems that the most common service offered in the UK is outdoor education (67.4% of organisations) followed by outdoor recreation (60.1%). The following figure provides an overview of all services offered by the British organisations (multiple choices possible). The category 'other' included services such as: Management Development Training, Skills training, military based activities, outdoor activities instructing and coaching, food hygiene training, arts programmes and respite services.

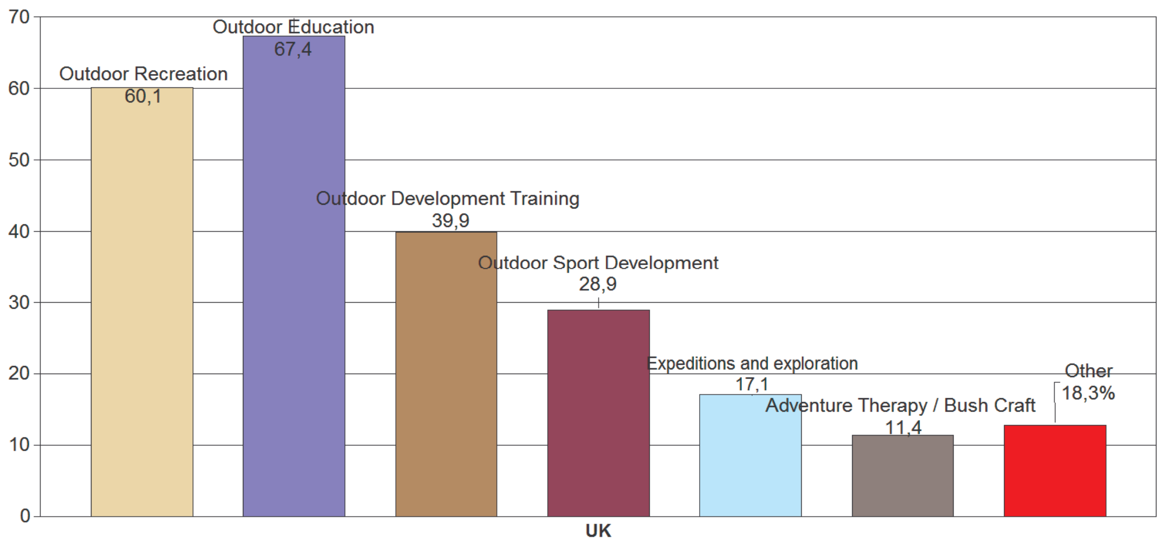



Figure 88: The outdoors service offer (UK)

### 3.11.8 Outdoor organisation's activities

The following tables highlight all activities offered by the British organisations in the different categories which are Air, Snow, Lakes & Sea, River and Earth. The results are split if delivered by own staff or by a sub-contractor (multiple choices possible):

**AIR**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 4 | 100,0% | - |
| Hot air balloon | - | - | - |
| Paragliding | 3 | 100,0% | - |
| Parapenting | - | - | - |
| Parachuting | 1 | 100,0% | - |
| ULM | - | - | - |

Table 73: Activities by outdoor service offer – AIR (UK)

**SNOW**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 7 | 100,0% | - |
| Skiing (Alpine) | 4 | 100,0% | - |
| Skiing (Cross Country) | - | - | - |
| Snow Boarding | 1 | 100,0% | - |
| Snow shoes trekking | - | - | - |
| Mountaineering | 1 | 100,0% | - |
| Snow mobile (motor) | - | - | - |
| Telemark skiing | - | - | - |
| Ski trekking | - | - | - |
| Kick sledding | - | - | - |
| Musher | - | - | - |
| Ice fishing | - | - | - |
| Ice skating | - | - | - |
| Sledging | - | - | - |
| Kite skiing | 1 | 100,0% | - |
| Ski joering (horse) | - | - | - |

Table 74: Activities by outdoor service offer – SNOW (UK)

## LAKES AND SEA

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 303 | 100,0% | - |
| Board surfing | 21 | 100,0% | - |
| Body board surfing | - | - | - |
| Canoeing / Kayaking / Sea Kayaking | 167 | 100,0% | - |
| Diving | 4 | 100,0% | - |
| Sailing | 74 | 100,0% | - |
| Water skiing/wake boarding | - | - | - |
| Wind surfing | 35 | 100,0% | - |
| Beach games | - | - | - |
| Buggy sailing | - | - | - |
| Fishing (Deep sea) | 1 | 100,0% | - |
| Parasailing | - | - | - |
| Jet ski | - | - | - |
| Kite surf | 1 | 100,0% | - |

Table 75: Activities by outdoor service offer –LAKES & SEA (UK)

## RIVER

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 362 | 100,0% | - |
| Rafting | 25 | 100,0% | - |
| Canoeing | 167 | 100,0% | - |
| Kayaking | 167 | 100,0% | - |
| Hydro speed | - | - | - |
| Rapid swimming | - | - | - |
| Fishing | 3 | 100,0% | - |

Table 76: Activities by outdoor service offer – RIVER (UK)

## EARTH

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 1077 | 100,0% | - |
| Hiking / Hill walking | 160 | 100,0% | - |
| Nordic walk | 2 | 100,0% | - |
| Nature discovery | 11 | 100,0% | - |
| Orienteering | 154 | 100,0% | - |
| ATB biking | 121 | 100,0% | - |
| Cycling | 6 | 100,0% | - |
| Quad | 2 | 100,0% | - |
| Roller skating | - | - | - |
| 4x4 | - | - | - |
| Horse riding | 42 | 100,0% | - |
| Abseiling | 150 | 100,0% | - |
| Canyoning | 105 | 100,0% | - |
| Caving | 53 | 100,0% | - |
| High ropes parks | 7 | 100,0% | - |
| Rock climbing | 164 | 100,0% | - |
| Via Ferrata | - | - | - |
| Bungee jumping | - | - | - |
| Archery | 84 | 100,0% | - |
| Paint Ball | 14 | 100,0% | - |
| Shooting activities | 2 | 100,0% | - |
| Challenge courses | - | - | - |

Table 77: Activities by outdoor service offer – EARTH (UK)

Almost 65% of the organisations identify that they offer ‘other services’ than mentioned above:

- Forest school and earth education
- Activity breaks
- Rambling
- Conservation activities
- Adventure sports
- National Navigation Award Courses Winter Skills courses Trekking
- Coasteering
- Team-Building events
- Training and support for members operating within the outdoor industry
- Motor bike riding drama craft third world workparties camping camp work skiing sports - ball sports swimming outdoors development training games horse riding indoor tobogganing outdoor water games karting car driving photography ....

- Any Activity is possible.  We work with groups to decide what activities they would like to try.
- Low ropes
- Tai Chi, Yoga
- Outdoor first aid training, sports first aid training, training outdoor first aid instructors
- Clay pigeon  air soft
- Golf, high ropes course, zip wire
- Fencing, Problem solving/ team tasks & powerboat courses
- Dragon Boat Racing
- 3G swing,
- Educational programmes
- Rambling, informal recreation, and wildlife activities (including schools)
- Coasteering
- Landscape photography, astronomy, natural sculpture, dry stone walling
- Activity breaks, Rambling,  Adventure sports
- Health walks low level low impact
- Bed and breakfast
- Environmental Education; Education for sustainable development
- Bush craft and nature based learning
- Climbing Tower
- Forest School
- Leisure driving
- Weaselling
- Forest walks outdoor sports
- Laser Combat
- Snow Kiting, Kite surfing Stand Up, Paddle boarding, Kite-land boarding, Power Kiting
- Outdoor First Aid courses, expedition first aid courses and trainer training for same.
- Expedition Food Hygiene courses for outdoor leaders, DoE groups, expedition leaders

### 3.11.9 Outdoor organisation's type of participants

The level of participation in all those activities showed a significant variation, ranging from 10 participants/ members to in excess of 15,000,000 per year, whilst the Median is 1.200 participants (members) per year and the arithmetic mean (average) is 62,357 participants (members).

The following figure shows the main participant groups (with multiple choices possible) in percent. Amongst those mentioned as main participant groups in 'other', the most commonly cited groups of participants included higher education institutions, further education colleges, people with disabilities/special needs, youth groups (e.g. scouts, guides, cadets), charitable/community groups, faith groups, older people, the youth service (e.g. Connexions, youth justice services) and social groups (e.g. stag and hen parties).

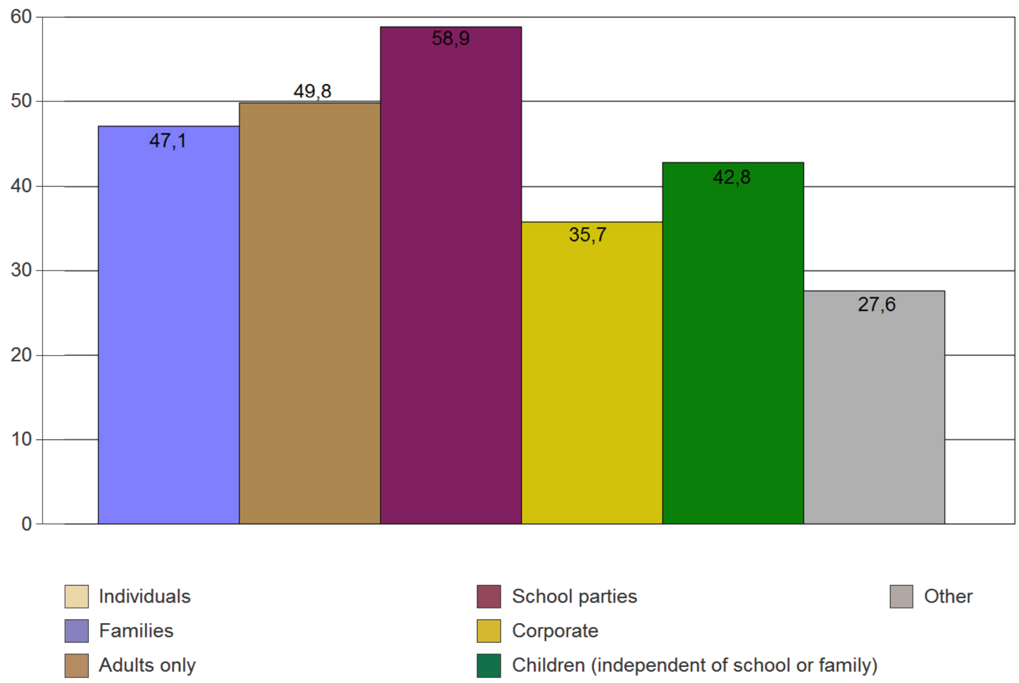



Figure 89: Main participants (UK)

### 3.11.10 Outdoor organisation's seasonality

The figure below shows that from the responses received through the survey the outdoors industry in the UK is subject to seasonal variation. Between 71.3% and 86.2% of responding organisations from the UK identified the main high demand seasons from May to September, whilst a peaks was experienced in June. The winter months of November to February appear to be the least busy ones for Belgian outdoors organisations. The most common months for closure were August and December.

| Analysis % Respondents | Total | High season | Low season | Closed - no activities offered |
|---|---|---|---|---|
| Base | 3470 | 55,1% | 41,6% | 3,3% |
| January | 281 | 20,3% | 72,2% | 7,5% |
| February | 287 | 29,3% | 67,2% | 3,5% |
| March | 290 | 42,4% | 57,2% | 0,3% |
| April | 294 | 65,3% | 34,7% | - |
| May | 294 | 84,4% | 15,6% | - |
| June | 290 | 86,2% | 13,1% | 0,7% |
| July | 288 | 82,3% | 14,2% | 3,5% |
| August | 289 | 71,3% | 20,1% | 8,7% |
| September | 292 | 74,3% | 25,3% | 0,3% |
| October | 290 | 56,2% | 43,1% | 0,7% |
| November | 286 | 29,4% | 66,8% | 3,8% |
| December | 289 | 17,6% | 71,6% | 10,7% |

Table 78: Seasonal variation (UK)

### 3.11.11 Outdoor organisation's main challenges

In regards of key challenges facing outdoors organisations in The UK more than half of the organisations participating highlighted current 'legislation and regulation' (68.7%) as first choice, closely followed by 'lack of funding' (68%) and 'increasing operating costs' (66.7%); whilst e.g. business development (1.7%) and access to land/rivers/coast (2.1%) remain challenges to only a minor group of outdoor organisations. Other challenges mentioned include: Budgetary constraints, reviewing and improving service ongoing safety checks, complex qualification structure, and regulatory micro-management.

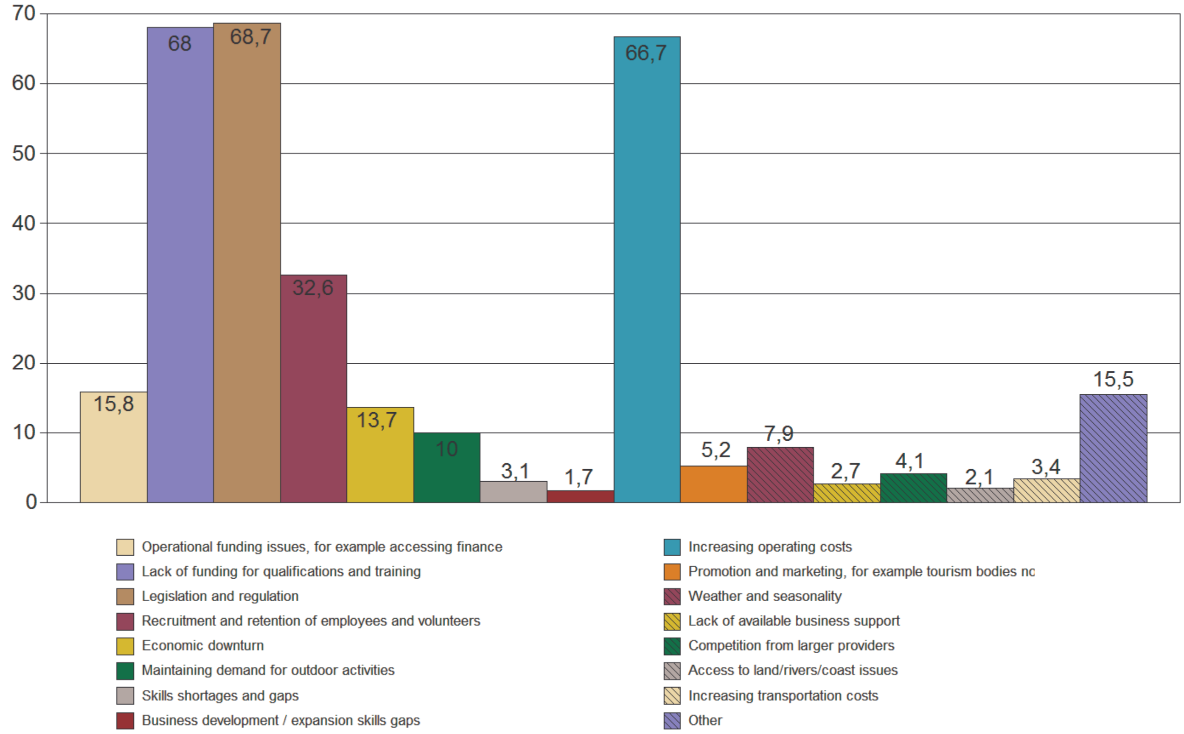



Figure 90: Main challenges facing organisation (UK)

# 4. CLO2 SURVEY – TYPE OF ORGANISATIONS (EU11)

This section reviews selected results on the size and nature of outdoors organisations and explores the range of activities offered across the outdoors sub-sector in the selected eleven EU countries.

**SURVEY KEY DATA AND FACTS:**

- The CLO2 Survey includes 632 replies from 12 countries; the number of replies per country varies and is largely dominated by the UK which represents 47.3% of the total so the results in regards of covering any European perspective must be read and considered carefully.
- Survey replies were mostly received from the for-profit sector (54%), followed by 20% of replies from the non-for-profit, voluntary or charitable sector, and 8.8% from public organisations.

Overall, 632 outdoors organisations completed the CLO2 2010 Outdoors Survey from eleven targeted countries plus one country outside the CLO2 partnership (Croatia). The following figure provides an overview of the distribution of the replies in percent:

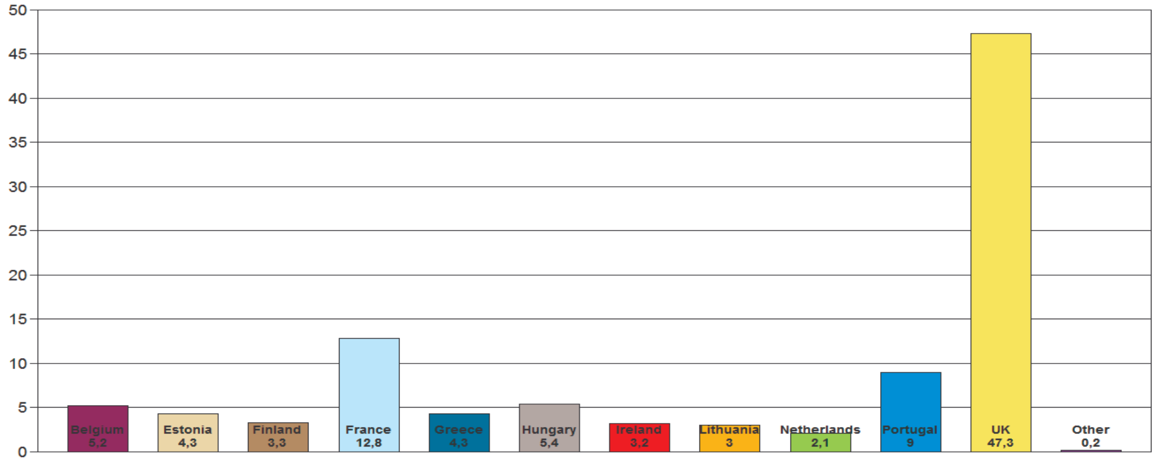



Figure 91: Replies (n=632) split per country in % (EU11)

Organisations in the countries covered by the CLO2 project include a mix of not-for-profit / voluntary organisations, commercial / private operators, or public organisations / local authorities, whilst replies in this survey were mostly received from the for-profit sector (54%). The category 'other' reflects mainly replies from the UK that included sole traders, freelancers or partnerships, or describing themselves as something else e.g. education providers and national centres/authorities. The following figure provides the overview of replies split per type of organisation.

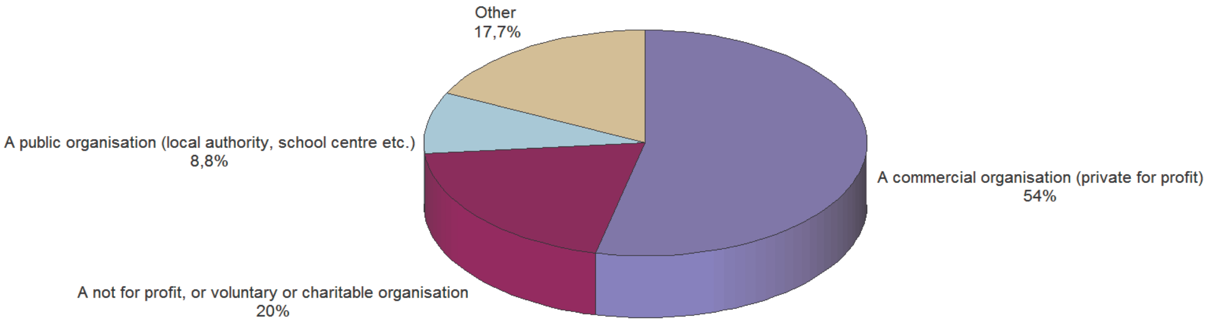



Figure 92: Replies per type of organisation in % (EU11)

# 5. OUTDOOR ACTIVITIES AND SERVICES (EU11)

From the responses obtained through the CLO2 survey in each relevant national country, this section outlines selected results on the nature of activities within the outdoors sub-sector.

**SURVEY KEY DATA AND FACTS:**

- ‘Outdoor recreation’ has been selected as the most common service offered (70.2%) and was rated as main service option in ten countries.
- Activities in the category earth are offered most.
- Activities in the categories ‘earth’, ‘river’, ‘lakes & sea’ and ‘snow are mostly provided by own staff, whilst activities in the category ‘air’ are mainly provided through sub-contracting.

### 5.1 Type of outdoor services provided

From the responses received, it seems that the most common service offered by the organisations responded in the selected CLO2 EU countries is outdoor recreation (70.2%), followed by outdoor education (51.4%). Considering a split per country, further analysis revealed that all countries except the UK have chosen outdoor recreation as main service offered, whilst the UK organisations have selected outdoor education as first and outdoor recreation as second choice. ‘Other services’ are outlined in detail in the respective country sections above.

The following figure provides an overview of all services offered by the EU11 organisations (multiple choices possible).

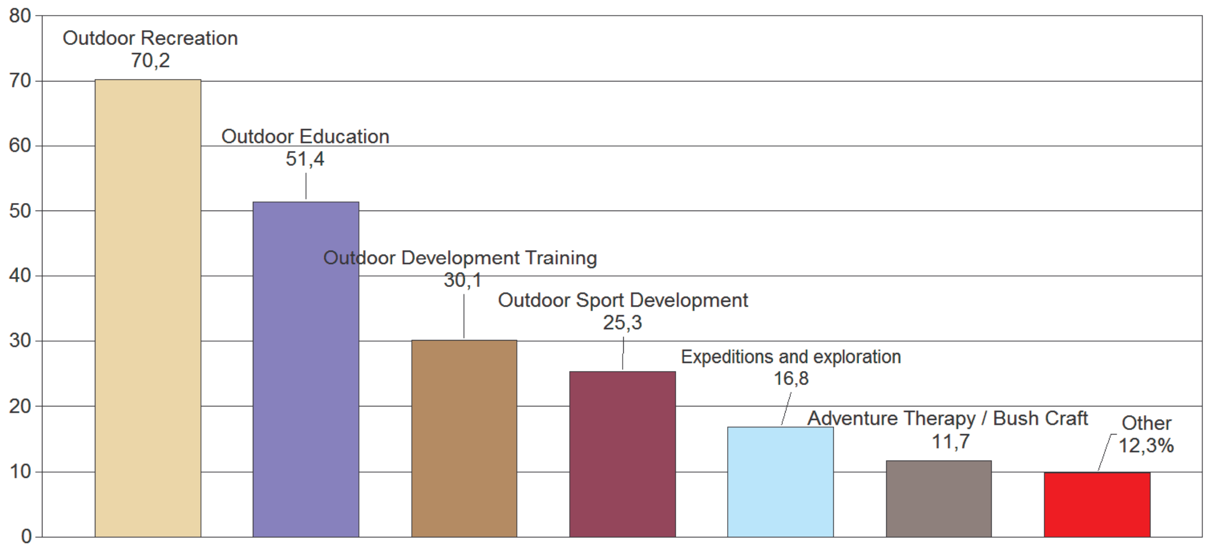



Figure 93: Service offer per category in % (EU11)

Besides single analysis per country (see the respective national sections above), the following figure shows the two most chosen categories 'outdoor recreation' and 'outdoor education' in relation to each other by a country split:

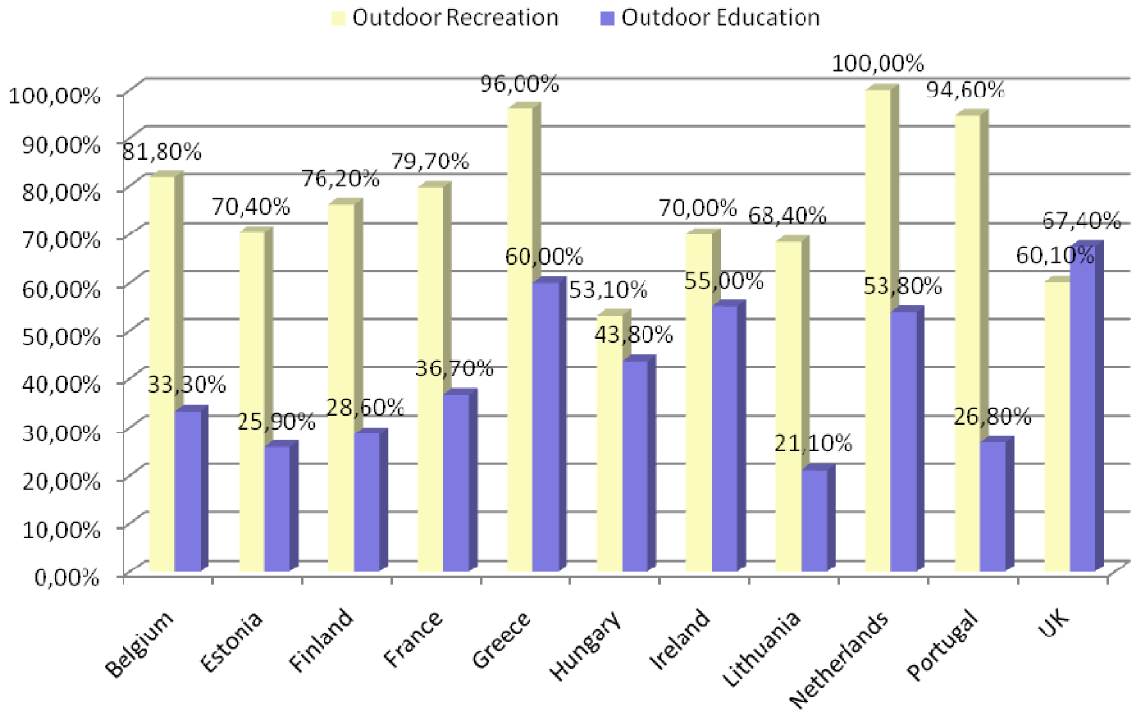



Figure 94: Top 2 categories in 'service offer' relation per country (EU11)

### 5.2 Type of outdoor activities provided

In regards of single activities offered, the organisations that replied to the CLO2 reported that by far activities in the category earth were offered most.[40] The following figure provides an overview of the activities offered per category showing the number of total clicks with multiple choices possible ('earth': 2,610; snow' 333, 'river' 782, 'lakes & sea' 708 and 'air' 98):

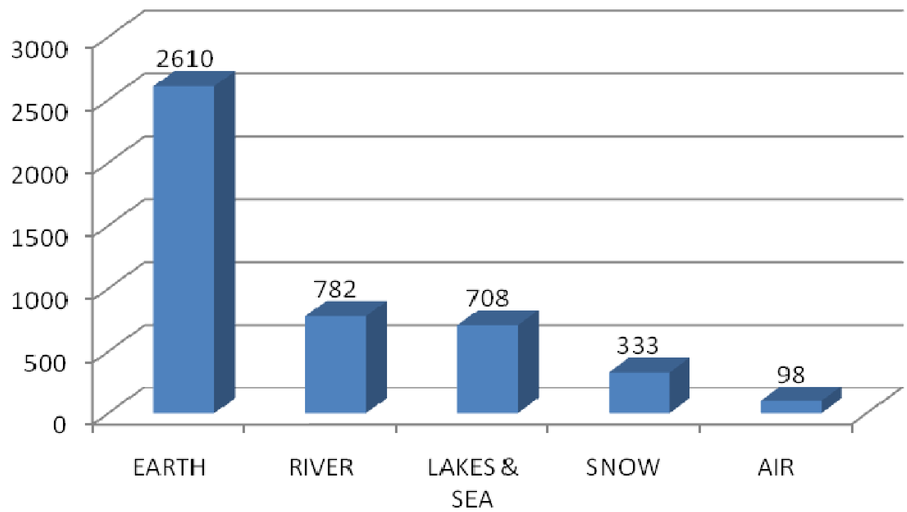



Figure 95: Activities offered per category (total clicks with multiple choices possible) (EU11)

[40] For the category 'earth' the questionnaire provided 21 activities, for 'snow' 15 activities, for 'river' 6 activities, for 'lakes & sea' 13 activities and for 'air' 5 activities.

Further analysis on the provision of those activities by either the organisations' own staff or by sub-contracting revealed that activities in the categories 'earth' (87.7%), 'river' (88.4%), 'lakes & sea' (85.9%) and 'snow' (78.7%) are mostly provided by own staff, whilst activities in the category 'air' (76.5%) are mainly provided through sub-contracting.

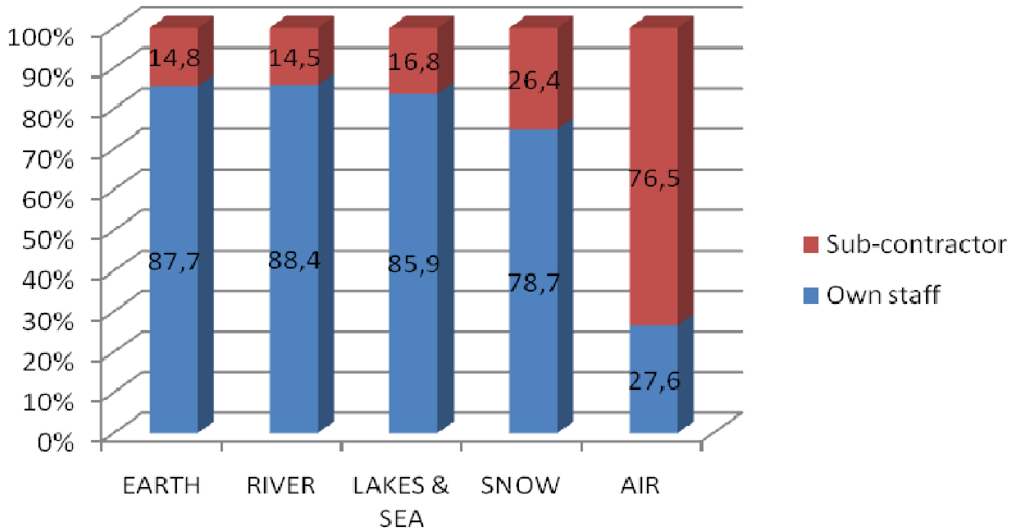



Figure 96: Activities offered spilt by offer through own staff or sub-contractors in % (EU11)

The following five tables give more detailed overview on the activities and services offered on a regular basis in total clicks (multiple choices possible) split by their delivery in % (multiple choices possible):

**SNOW**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 333 | 78,7% | 26,4% |
| Skiing (Alpine) | 32 | 75,0% | 28,1% |
| Skiing (Cross Country) | 31 | 83,9% | 19,4% |
| Snow Boarding | 25 | 60,0% | 40,0% |
| Snow shoes trekking | 40 | 85,0% | 20,0% |
| Mountaineering | 56 | 85,7% | 23,2% |
| Snow mobile (motor) | 17 | 64,7% | 41,2% |
| Telemark skiing | 3 | 66,7% | 33,3% |
| Ski trekking | 39 | 87,2% | 23,1% |
| Kick sledding | 11 | 72,7% | 27,3% |
| Musher | 19 | 42,1% | 63,2% |
| Ice fishing | 15 | 100,0% | 6,7% |
| Ice skating | 11 | 100,0% | - |
| Sledging | 14 | 92,9% | 7,1% |
| Kite skiing | 8 | 87,5% | 12,5% |
| Ski joering (horse) | 12 | 50,0% | 58,3% |

Table 79: Category SNOW: Activities and services offered on a regular basis in total clicks (multiple choices possible) split by delivery in % (multiple choices possible) (EU11)

**RIVER**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 782 | 88,4% | 14,5% |
| Rafting | 106 | 73,6% | 29,2% |
| Canoeing | 299 | 92,0% | 10,4% |
| Kayaking | 278 | 94,2% | 8,3% |
| Hydro speed | 33 | 63,6% | 36,4% |
| Rapid swimming | 16 | 75,0% | 25,0% |
| Fishing | 50 | 86,0% | 24,0% |

Table 80: Category RIVER: Activities and services offered on a regular basis in total clicks (multiple choices possible) split by delivery in % (multiple choices possible) (EU11)

**EARTH**

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 2610 | 87,7% | 14,8% |
| Hiking / Hill walking | 307 | 96,4% | 7,2% |
| Nordic walk | 33 | 90,9% | 9,1% |
| Nature discovery | 112 | 91,1% | 16,1% |
| Orienteering | 268 | 94,4% | 6,0% |
| ATB biking | 207 | 96,6% | 4,8% |
| Cycling | 83 | 90,4% | 12,0% |
| Quad | 55 | 58,2% | 45,5% |
| Roller skating | 12 | 83,3% | 16,7% |
| 4x4 | 54 | 70,4% | 33,3% |
| Horse riding | 113 | 63,7% | 39,8% |
| Abseiling | 237 | 94,9% | 5,9% |
| Canyoning | 171 | 90,6% | 15,2% |
| Caving | 95 | 86,3% | 13,7% |
| High ropes parks | 100 | 80,0% | 24,0% |
| Rock climbing | 272 | 92,6% | 8,8% |
| Via Ferrata | 47 | 76,6% | 27,7% |
| Bungee jumping | 14 | 50,0% | 50,0% |
| Archery | 199 | 88,9% | 12,1% |
| Paint Ball | 98 | 60,2% | 40,8% |
| Shooting activities | 54 | 79,6% | 22,2% |
| Challenge courses | 79 | 83,5% | 25,3% |

Table 81: Category EARTH: Activities and services offered on a regular basis in total clicks (multiple choices possible) split by delivery in % (multiple choices possible) (EU11)

## AIR

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 98 | 27,6% | 76,5% |
| Hot air balloon | 27 | 22,2% | 77,8% |
| Paragliding | 15 | 33,3% | 66,7% |
| Parapenting | 20 | 25,0% | 80,0% |
| Parachuting | 26 | 26,9% | 84,6% |
| ULM | 10 | 40,0% | 60,0% |

Table 82: Category AIR: Activities and services offered on a regular basis in total clicks (multiple choices possible) split by delivery in % (multiple choices possible) (EU11)

## LAKES AND SEA

| Analysis % Respondents | Total | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|---|
| Base | 708 | 85,9% | 16,8% |
| Board surfing | 43 | 88,4% | 14,0% |
| Body board surfing | 20 | 80,0% | 20,0% |
| Canoeing / Kayaking / Sea Kayaking | 274 | 96,0% | 6,6% |
| Diving | 52 | 67,3% | 36,5% |
| Sailing | 127 | 84,3% | 17,3% |
| Water skiing/wake boarding | 20 | 70,0% | 35,0% |
| Wind surfing | 55 | 94,5% | 5,5% |
| Beach games | 40 | 95,0% | 5,0% |
| Buggy sailing | 10 | 60,0% | 40,0% |
| Fishing (Deep sea) | 22 | 72,7% | 36,4% |
| Parasailing | 5 | 40,0% | 60,0% |
| Jet ski | 22 | 40,9% | 63,6% |
| Kite surf | 18 | 66,7% | 50,0% |

Table 83: Category LAKES & SEA: Activities and services offered on a regular basis in total clicks (multiple choices possible) split by delivery in % (multiple choices possible) (EU11)

# 6. THE OUTDOOR WORKFORCE & PARTICIPANTS (EU11)

This section outlines selected outcomes about the nature of employment and the profile of participants within the outdoors sub-sector in the selected CLO2 countries.

**SURVEY KEY DATA AND FACTS:**

- Around 80% of organisations employ paid staff and around 38% have some volunteers; 7% of the organisations operated entirely on volunteers.
- More than half of the commercial organisations are run with paid staff only, whilst in non-for-profit organisations about one third is run by volunteers only.
- The CLO2 data indicates that the workforce (staff) is mostly dominated by man.
- The CLO2 data indicates that participant groups cover a broad variety mostly equally served.

Overall around 80.5% of organisations from the CLO2 study identified that they currently employ paid staff and around 38.5% currently had volunteer staff. Further analysis reveals that 7% of the organisations operated entirely on volunteers, 49% operated entirely on paid employees and app. eleven per cent was sole practitioners. Overall, 31.5% of organisations had a mixture of paid staff and volunteers. For single analysis per country please see the respective national sections above.

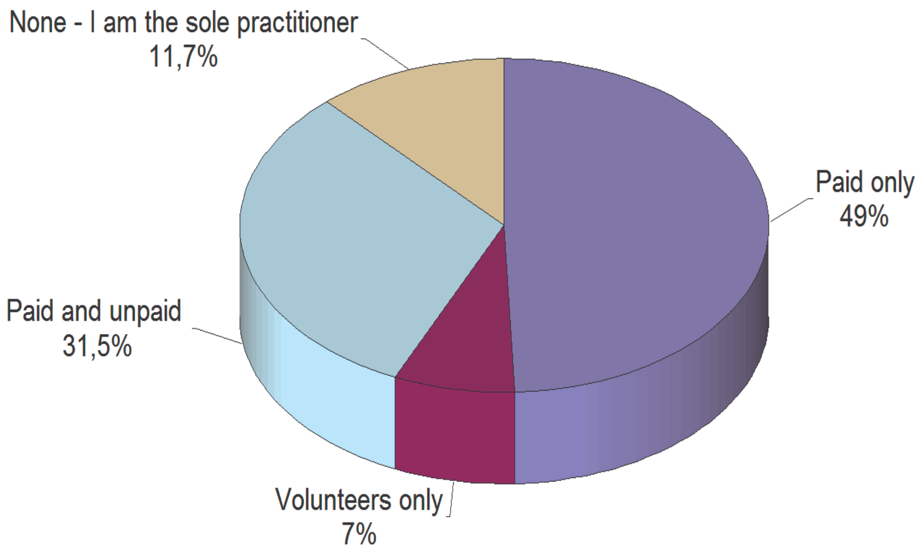



Figure 97: Employment type (EU11)

Further analysis regarding the employment type reveals that more than half of the commercial organisations is ran with paid staff only, whilst in non-for-profit organisations 29% ticked that they are ran by volunteers only.

Besides single analysis per country (see the respective national sections above), the following figure shows the employment type by a country split:

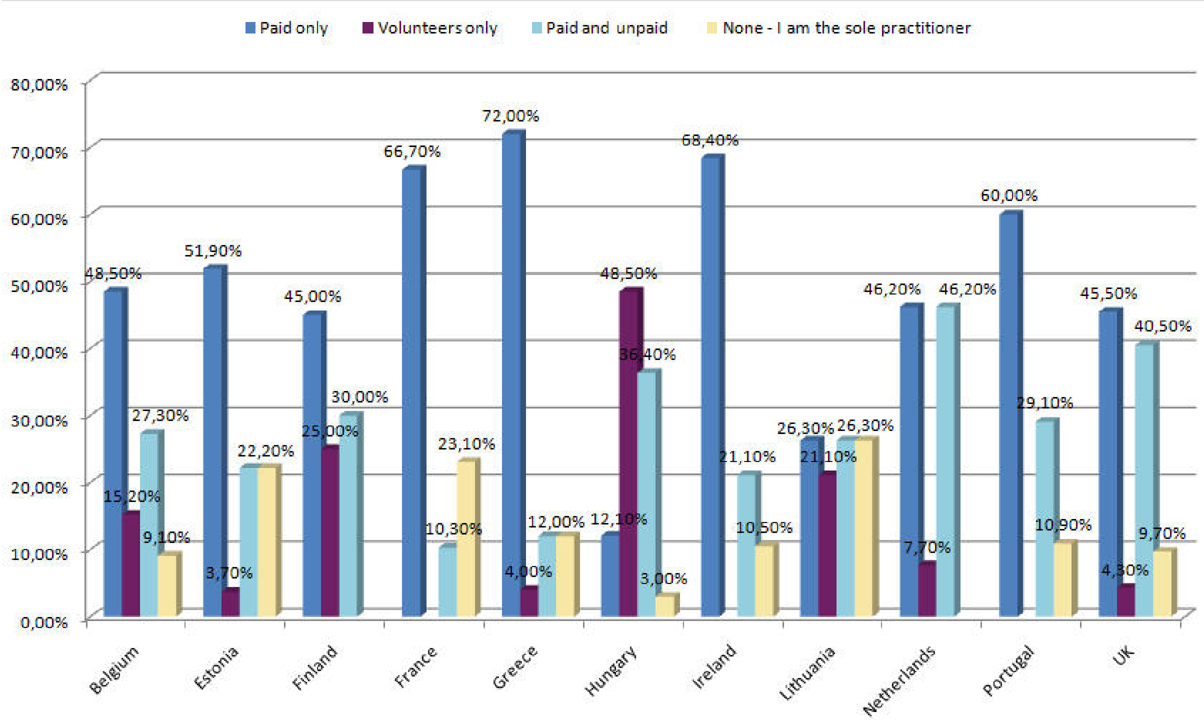



Figure 98: Employment type per country split (EU11)

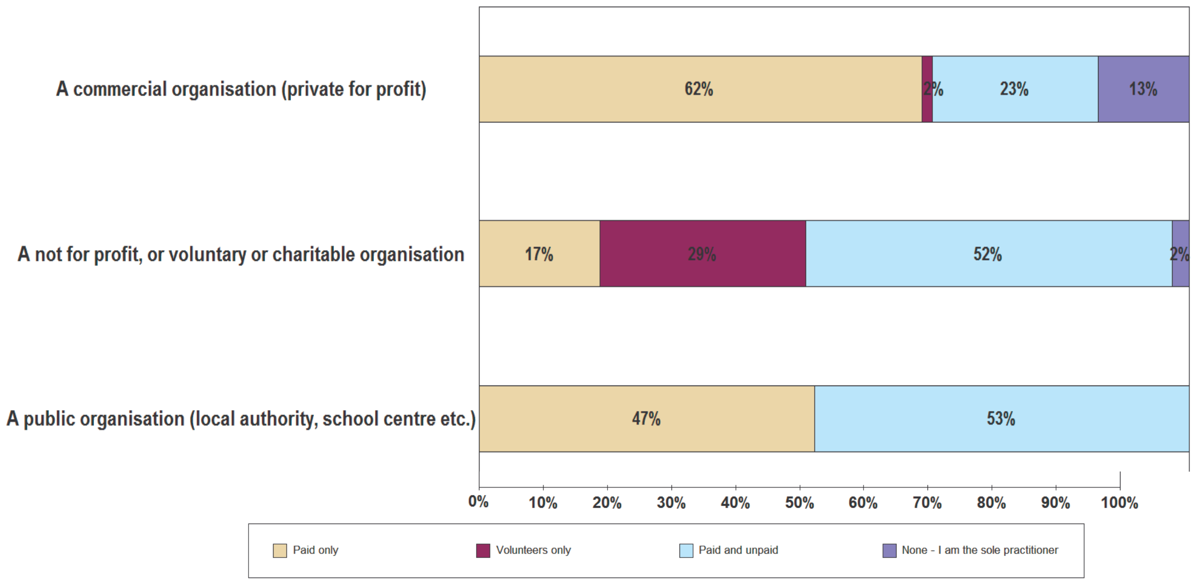



Figure 99: Employment type split per type of organisation in % (EU11)

The following figure shows the workforce situation split by gender in all CLO2 countries. The data reveals that except in Estonia and the UK - where the participating organisations informed about a more or less equal gender split of their workforce - that the sector is mainly dominated by men.

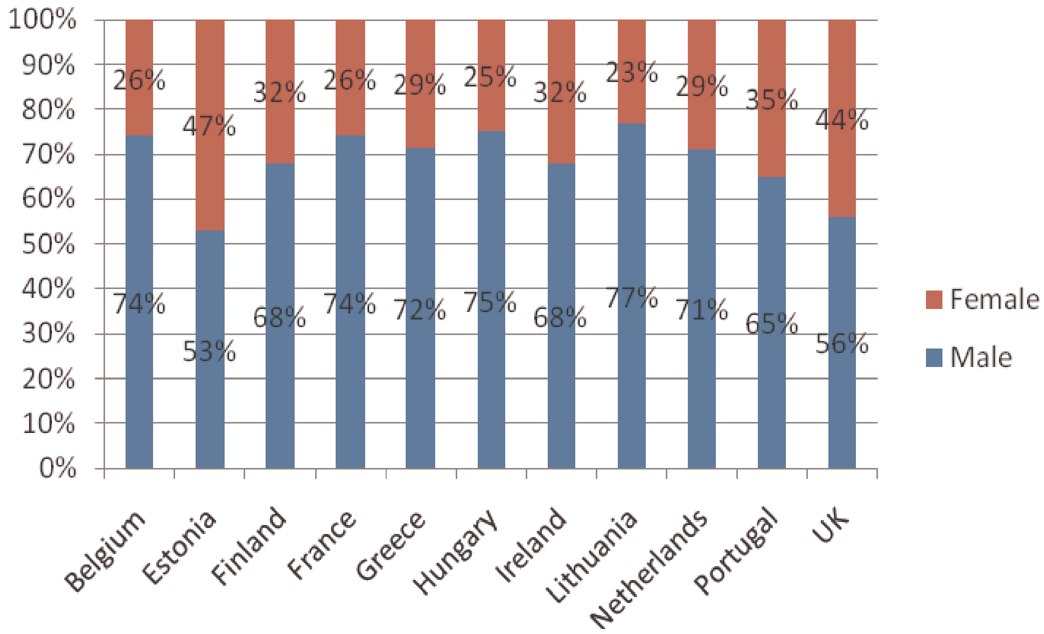



Figure 100: Workforce split by gender (EU11)

The level of participation reported in the survey showed a significant variation, ranging from 2 participants/members (from one organisation from Portugal) to an excess of 15 million per year (reported from the UK), whilst the Median is 1,000 participants (members).

The following figure shows the median of participation reported in the CLO2 survey by country (it has to be noted that details can be seen in the country sections above). For the Netherlands, one has to consider from the information given above that the feedback provided from survey participants (n=13) was ranging from 20 participants/ members to in excess of 100,000 per year.

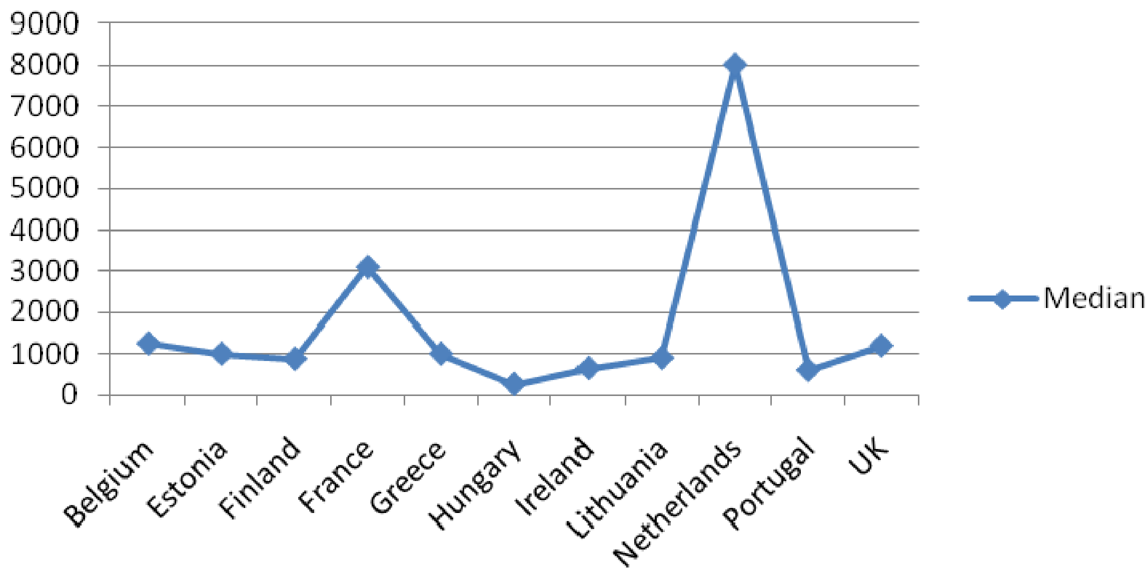



Figure 101: Median of participation in each CLO2 country

The CLO2 data indicates that participant groups cover a broad variety mostly equally served. Participant groups mentioned under the category 'other' can be explored in detail in the relating country section above. The following figure shows the main participant groups (with multiple choices possible) in percent.

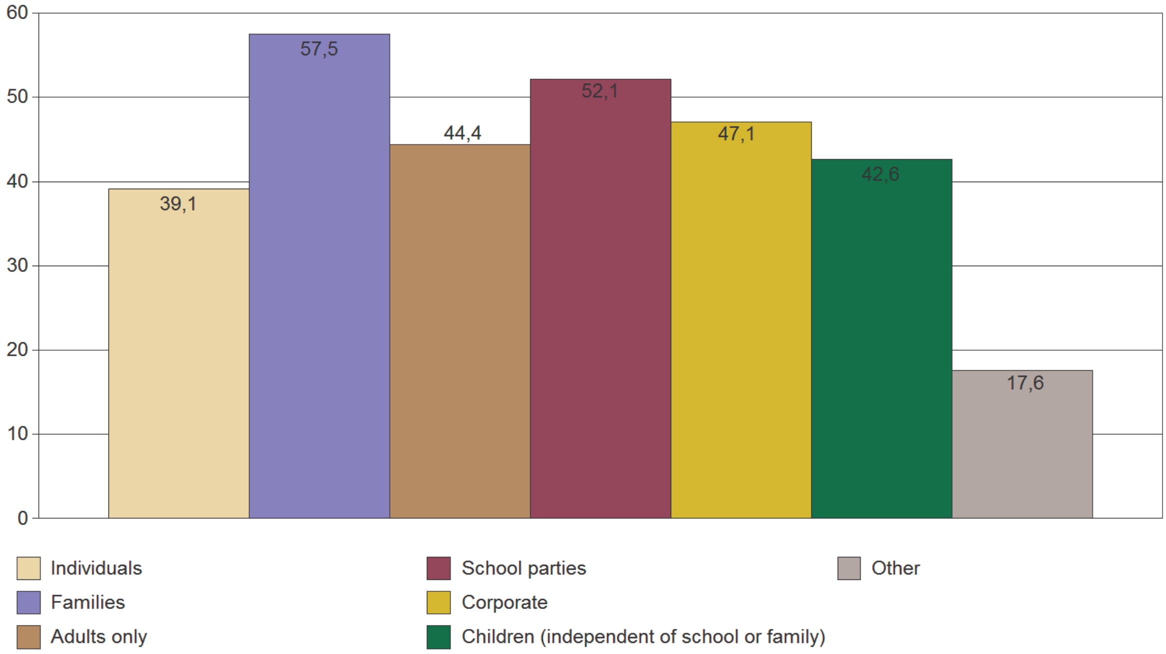



Figure 102: Main participants in % (multiple choices possible) (EU11)

# 7. THE SEASONALITY IN THE OUTDOOR SECTOR (EU11)

This section reviews the extent of seasonality within the outdoors sub-sector.

**SURVEY KEY DATA AND FACTS:**

- The outdoors sector defined by the CLO2 replies is subject to seasonal variation.
- The CLO2 data indicates that the high demand season is from May to September, whilst November to March appear to be less busy months.

The CLO2 data shows that from the responses received the outdoors industry is subject to seasonal variation. The responding organisations from the CLO2 countries identified the main high demand seasons from May to September, whilst peaks were experienced in June and July. The winter months of November to March appear to be the less busy ones for most outdoors organisations. The most common months for closure were December and January.

| Analysis % Respondents | Total | High season | Low season | Closed - no activities offered |
|---|---|---|---|---|
| Base | 7191 | 51,8% | 41,6% | 6,6% |
| January | 584 | 19,7% | 62,0% | 18,3% |
| February | 588 | 25,2% | 62,1% | 12,8% |
| March | 596 | 34,4% | 59,7% | 5,9% |
| April | 608 | 56,9% | 41,3% | 1,8% |
| May | 611 | 77,4% | 21,3% | 1,3% |
| June | 610 | 82,6% | 16,6% | 0,8% |
| July | 610 | 83,9% | 13,6% | 2,5% |
| August | 606 | 75,9% | 19,3% | 4,8% |
| September | 610 | 68,9% | 29,8% | 1,3% |
| October | 601 | 48,3% | 48,9% | 2,8% |
| November | 580 | 23,4% | 66,6% | 10,0% |
| December | 587 | 19,8% | 62,2% | 18,1% |

Table 84: Seasonality (EU11)

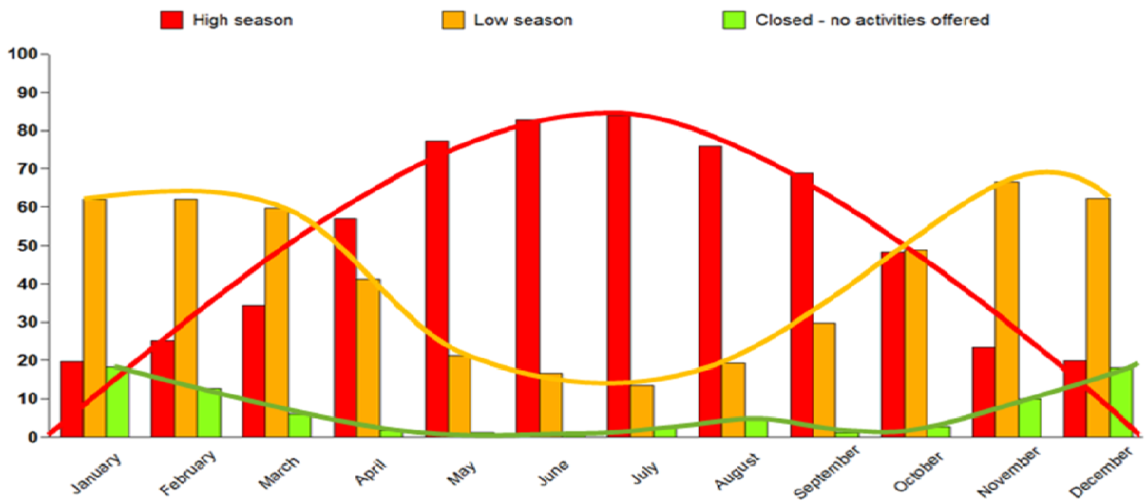



Figure 103: Seasonality (EU11)

It is important to notify that this element of seasonality in the CLO2 survey does not take into consideration the economic aspects of the seasonal activities. Also, geographical differences in some European countries are important and so the question of the seasonality may differ significantly depending of the location of the respondents. The results have to be taken into consideration carefully.

# 8. KEY CHALLENGES FACING THE OUTDOOR SECTOR (EU11)

This section explores the main challenges faced by employers in the outdoors sub-sector and their views on how to address these issues.

**KEY DATA AND FACTS**

- The CLO2 data indicates that 'increasing operating costs', current 'legislation and regulation' for the sector, and a 'lack of funding of qualifications and training' are the main challenges to the outdoors employers who replied to the survey.

In regards of key challenges facing outdoors organisations in the CLO2 countries more than half of the organisations participating highlighted 'increasing operating costs' (54.8%) and 'legislation and regulation' issues (54.5%) as first choice, closely followed by 'lack of funding for qualifications and training' (41.7%); whilst 'skills shortages and gaps' (5.5%) and 'business development' issues (6.3%) remain challenges to only a minor group of the outdoor organisations that replied to the CLO2 survey. Further challenges mentioned under the category 'other' can be explored in detail in the respective country sections above.

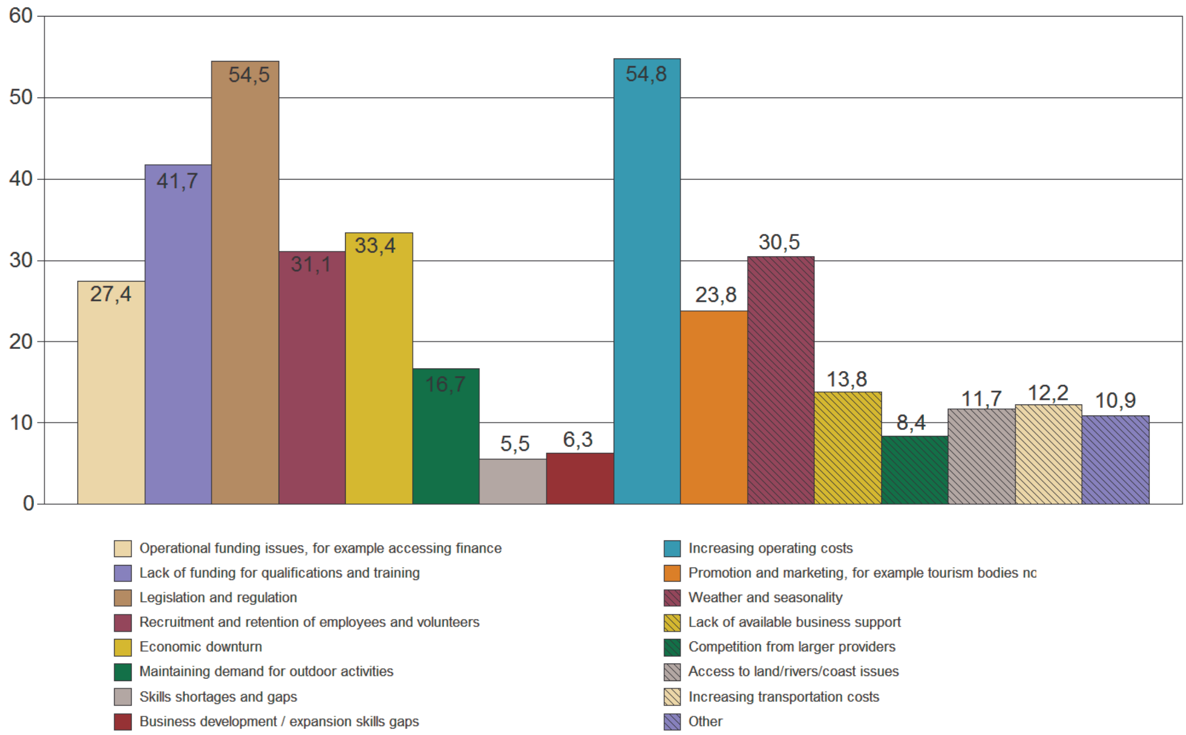



Figure 104: Key challenges (multiple choices possible) (EU11)

Besides single analysis per country (see the respective national sections above), the following figure shows the three most chosen categories 'lack of funding for qualifications and training', 'legislation and regulation', and 'increasing operating costs' in relation to each other by a country split:

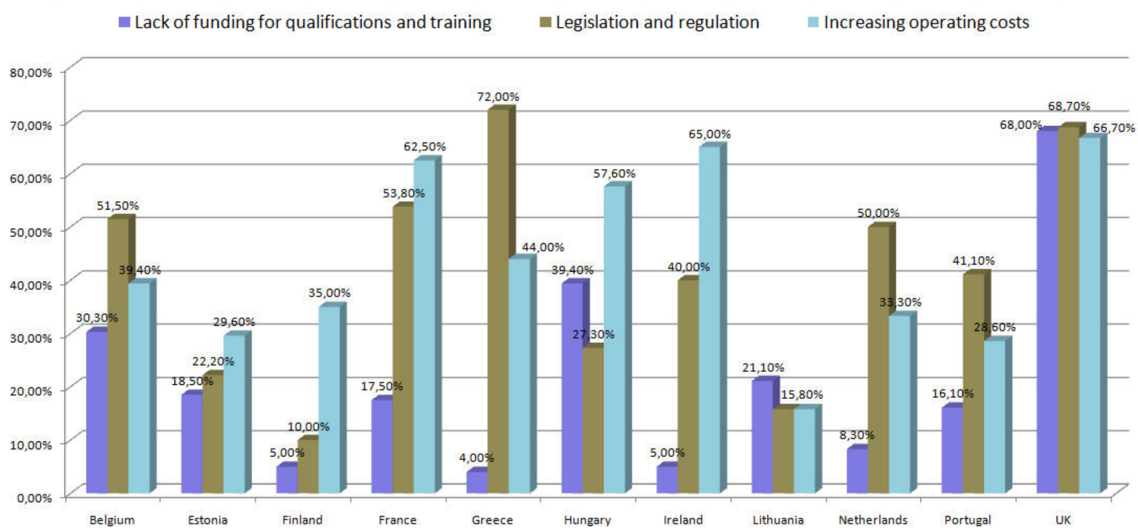



Figure 105: Top 3 categories in key challenges in relation by country (EU11)

# 9. CLO2 CONCLUSIONS

- The CLO2 data does not represent a national nor European view as it reflects only the view of selected representatives from the countries targeted (n=632).
- The CLO2 results were collected through a common pattern to allow comparison but due to the number of responses the results need to be interpreted carefully.
- The CLO2 data allows vague tendencies only but the data received indicates a broad variety in the sector.
- The CLO2 survey shows that information exchange seems to be difficult in the outdoors sector and that European issues might need to be better / further explained.
- The CLO2 survey has been a first step to picture and map the situation of the outdoors sector for the first time both at the national and the European level and therefore further research on the labour market and employment is needed.
- The CLO2 survey might serve as a framework / starting point for similar research projects in the area of 'fitness', 'recreation', 'sports', 'sports for all', 'traditional games' etc.
- The CLO2 survey can and shall be used as a framework / starting point for further in-depth research in the sector.
- Based on the CLO2 experiences, the methodology / approach to raise participation might need to be further developed / adapted (e.g. approach to the stakeholders) for next surveys.

# 10. ANNEXES

## 10.1. Survey Introduction and Thank You Notice (English Version)

CLO2: THE 2010 EUROPEAN OUTDOORS CENSUS SURVEY 2010

SkillsActive

**WELCOME TO THE EUROPEAN OUTDOORS CENSUS SURVEY 2010!**

**PLEASE CHOOSE YOUR LANGUAGE**: The questionnaire is available in different languages so please click on the relevant flag to choose the language you want to use to fill the questionnaire:

**FAQs / HELP**: A document with further information about the survey has been developed in different languages so if necessary please click on the relevant flag to obtain more details:

*This European project and survey has been funded by the European Commission under the Leonardo da Vinci Programme.*



CLO2: THE 2010 EUROPEAN OUTDOORS CENSUS SURVEY 2010

SkillsActive

**Thank you for participating in the CLO2 survey!**

**Your responses were successfully submitted.**

**We greatly appreciate your time and feedback.**

**The CLO2 Research Team**

kiitos aitäh thanks bedankt obrigado merci aciu köszönet ευχαριστίες

# 10.2. Survey Email Announcement (English Version)

**THE 2010 EUROPEAN OUTDOORS CENSUS SURVEY – CLO2**

**Dear Outdoor Colleague,**

We are contacting you to ask for your contribution to a survey on the situation of the outdoor sector in the European Union (EU) that we are conducting for the European Commission.

**➲ WHAT IS THE SURVEY?**

This simple and very short survey is designed to give the outdoors and adventure industry sector something that currently does not exist. The survey aims to give us all basic information about the outdoors sector across a wide range of 11 European countries. It should only take you around 10-15 minutes to complete it.

The main objective of this survey is to collect information on the key activities and services offered by outdoors organisations, the main participants for those activities, and the seasonal variations of both activities and participation. For the first time, this will enable a picture of the sector to be built up at the national level and also across Europe. We are also keen to find out what employees and/or volunteers are needed to run those activities effectively. An accurate and up to date 'picture' of the sector is essential to promote the sector's value both nationally and within the European Community. Without this information, our significant contribution to society can be missed or underestimated!

As you will see, the questions focus on simple factual information about your organisation, your staff and its activities. It is part of a larger European project called CLO2 to do with the capabilities needed to work in the outdoors.

More information can be found here: http://www.clo-2.eu/home/

**➲ WHO SHOULD COMPLETE IT?**

Any organisation that offers a service to customers or participants relating to the outdoors is encouraged to complete the survey. From the first Questions, you will see this covers commercial, public sector, charitable/not-for-profit and voluntary organisations, such as clubs. It is ***not*** just for one narrow sub-sector of the outdoors, such as commercial or voluntary organisations. The outdoors also covers outdoor recreation, outdoor education, development training, expeditions etc. By "any organisation" we include freelance instructors and sole traders. We also include those who work from an outdoors centre and those who use the open countryside, rivers, hills, lakes, mountains, sea and air. Your contribution will remain anonymous and you may cancel your response whenever you want.

**➲ WHAT IF YOU ARE A FEDERATION, GOVERNING BODY OR OUTDOOR NETWORK?**

We would be grateful for your help in cascading this survey to your member organisations and through as many links as possible – please note, each individual organisation should only complete the survey once!

**➲ WHY SHOULD YOU COMPLETE IT?**

Increasingly, in a wide range of situations, many of us need to give a 'picture' of the outdoors as a sector. This 'picture' is of the basic information about "the micro" (at an individual organisation level) and "the macro" (at an overall regional, national and increasingly European level). This might be to help access funding locally, or making a case to governments nationally for a policy related to the outdoors. It is clear we need this kind of basic but important information. Of course, your contribution is vital – without it we do not have that important 'picture' of our outdoors industry sector. We would be delighted to share the results of the survey with everyone who completes it, so you too can make use of this important data. See the information at the end of the survey about how to organise this.

**➲ WHAT WILL THE SURVEY INFORMATION BE USED FOR… AND BY WHOM?**

All information used for the survey report will be anonymous – no one organisation will be identified. As noted above anyone completing the survey will be able to have the results, if they wish. There are two main uses for the information: firstly, to support and assist any organisation that completes the survey and wants to use the results to help itself and grow and develop the outdoors; the same is true for organisations that operate at regional and national levels; secondly, as part of the CLO2 project, the 11 partner organisations will produce a national and European picture of the outdoors industry sector.

**➲ WHAT IF I WOULD LIKE MORE INFORMATION?**

Should you require any further information, clarification or have any comments about the study and/or the questionnaire please do not hesitate to contact Matthias Guett (EOSE Research Manager) Matthias.guett@eose.org

***We thank you in advance for your contribution!***

| RESEARCH LEADER | PROMOTER |
| --- | --- |
| EOSE SECRETARIAT<br>1, Grande rue des Feuillants<br>69001 Lyon<br>France<br>Email : eosesec@eose.org<br>Tel.: +33 (0) 437 431 939<br>Fax: +33 (0) 437 430 988<br>Web: www.eose.org | SkillsActive<br>Castlewood House / 77-91New Oxford Street<br>London WC1A 1PX<br>United Kingdom<br>Email: Peter.thompson@skillsactive.com<br>Tel.: +44 (0)20 7632 2000<br>Fax: +44 (0)20 7632 2001<br>Web: www.skillsactive.com |

## 10.3. Survey Email Reminder (English Version)

"Dear Colleague,

**THE 2010 EUROPEAN OUTDOORS SURVEY – Final opportunity to make your input!**

A few weeks ago, we sent you an invite to contribute to an important survey. In this survey we are developing **a European wide picture of the Outdoors/Adventure industry sector.** We are keen to hear from all types of outdoor organisations – commercial, public sector, charitable/not-for-profit and voluntary. **If you have already made your input to the survey, many thanks for your contribution and please do not consider that message.**

We have had a good response from many countries so far, but we want to ensure the widest possible range and spread of organisations responding to help build a clear and useful picture of the growing and successful outdoors sector. So, we wanted to give you this **further opportunity to complete the short on-line survey**. It only takes **around 15 minutes to complete the survey.**

**PLEASE CLICK HERE TO ACCESS TO THE EUROPEAN OUTDOOR CENSUS SURVEY 2010 AND COMPLETE THE QUESTIONNAIRE**

By way of thanks, **all organisations completing the survey can choose to receive the survey results** that can be used in a wide range of ways – for example to support requests for funding, or to communicate with other organisations about the importance and worth of the outdoors. There is also the opportunity, if you wish, to **be kept informed of new developments in the outdoor sector**. Of course, you details will never be passed to any other organisation outside the European outdoors project.

**Many thanks for your help in and contribution to this exciting development for the outdoors!**

Best wishes"

## 10.4. Survey Questionnaire (English Version)


Dear Outdoor Employers,

We are contacting you to ask for your contribution to a study on the situation of the outdoor sector in the European Union (EU) that we are conducting for the European Commission. The main objective of this survey is to collect information on the key activities and services offered by outdoors organisations, the main participants for those activities, and the seasonal variation of both activities and participation to build up a picture of the sector across Europe. We are also keen to find out what staff and/or volunteers are needed to run those activities effectively. An accurate and up to date 'picture' of the sector is essential to promote the sector's value within the European Community. Without this information, our significant contribution to society can be overseen!

Who should complete the survey? Any commercial, public, not for profit/voluntary/charitable organisations that deliver outdoor activities for purposes such as recreation, education, development training, outdoor sport development, expeditions or adventure therapy. Is this your organisation? If so, please follow the survey.

As a key stakeholder of the sector in your country, your contribution is essential to help us meeting the objectives of this study. Your contribution will remain anonymous and you may cancel your response whenever you want.

If you are a federation, governing body or outdoor network, we ask for your help in cascading this survey to your member organisations - please note, each individual organisation should only complete the survey once!

If you are happy to be contacted for further information or if you would like to receive anonymous results from this survey, please give us your contact details.

Should you require any further information, clarification or have any comments about the study and/or the questionnaire please do not hesitate to contact Matthias Guett (Research Manager) (survey@eose.org) or Peter Thompson (SkillsActive UK) (peter.thompson@skillsactive.com).

We thank you in advance for your contribution!

**Please state the country in which the head office of your organisation is officially registered:**

- ○ *Belgium*
- ○ *Estonia*
- ○ *Finland*
- ○ *France*
- ○ *Greece*
- ○ *Hungary*
- ○ *Ireland*
- ○ *Lithuania*
- ○ *Netherlands*
- ○ *Portugal*
- ○ *UK*
- ○ *Other*

*Please specify:*

**Is your Outdoors organisation, club or centre ...?**

- *A commercial organisation (private for profit)*
- *A not for profit, or voluntary or charitable organisation*
- *A public organisation (local authority, school centre etc.)*
- *Other*

*Please specify:*

**Does your organisation employ staff on a paid or voluntary basis?** *(Please consider all your staff)*

- *Paid only*
- *Volunteers only*
- *Paid and unpaid*
- *None - I am the sole practitioner*

**In a typical year, thinking of your staff, how many people do you employ to deliver your activities or services?** *(Please insert a number)*

| | |
|---|---|
| *On a permanent basis* | |
| *On a seasonal basis* | |
| *On a self-employed/freelance basis* | |
| *On a voluntary basis* | |

**Category SNOW: What activities and services does your organisation currently offer on a regular basis?** *(Please tick all that apply)*

| | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|
| *Skiing (Alpine)* | | |
| *Skiing (Cross Country)* | | |
| *Snow Boarding* | | |
| *Snow shoes trekking* | | |
| *Mountaineering* | | |
| *Snow mobile (motor)* | | |
| *Telemark skiing* | | |
| *Ski trekking* | | |
| *Kick sledding* | | |
| *Musher* | | |
| *Ice fishing* | | |
| *Ice skating* | | |
| *Sledging* | | |
| *Kite skiing* | | |
| *Ski joering (horse)* | | |

**Category EARTH: What activities and services does your organisation currently offer on a regular basis?** *(Please tick all that apply)*

| | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|
| *Hiking / Hill walking* | ☐ | ☐ |
| *Nordic walk* | ☐ | ☐ |
| *Nature discovery* | ☐ | ☐ |
| *Orienteering* | ☐ | ☐ |
| *ATB biking* | ☐ | ☐ |
| *Cycling* | ☐ | ☐ |
| *Quad* | ☐ | ☐ |
| *Roller skating* | ☐ | ☐ |
| *4x4* | ☐ | ☐ |
| *Horse riding* | ☐ | ☐ |
| *Abseiling* | ☐ | ☐ |
| *Canyoning* | ☐ | ☐ |
| *Caving* | ☐ | ☐ |
| *High ropes parks* | ☐ | ☐ |
| *Rock climbing* | ☐ | ☐ |
| *Via Ferrata* | ☐ | ☐ |
| *Bungee jumping* | ☐ | ☐ |
| *Archery* | ☐ | ☐ |
| *Paint Ball* | ☐ | ☐ |
| *Shooting activities* | ☐ | ☐ |
| *Challenge courses* | ☐ | ☐ |

**Category RIVER: What activities and services does your organisation currently offer on a regular basis?** *(Please tick all that apply)*

| | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|
| *Rafting* | ☐ | ☐ |
| *Canoeing* | ☐ | ☐ |
| *Kayaking* | ☐ | ☐ |
| *Hydro speed* | ☐ | ☐ |
| *Rapid swimming* | ☐ | ☐ |
| *Fishing* | ☐ | ☐ |

**Category LAKES & SEA: What activities and services does your organisation currently offer on a regular basis?** *(Please tick all that apply)*

| | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|
| *Board surfing* | ☐ | ☐ |
| *Body board surfing* | ☐ | ☐ |
| *Canoeing / Kayaking / Sea Kayaking* | ☐ | ☐ |
| *Diving* | ☐ | ☐ |
| *Sailing* | ☐ | ☐ |
| *Water skiing/wake boarding* | ☐ | ☐ |
| *Wind surfing* | ☐ | ☐ |
| *Beach games* | ☐ | ☐ |
| *Buggy sailing* | ☐ | ☐ |
| *Fishing (Deep sea)* | ☐ | ☐ |
| *Parasailing* | ☐ | ☐ |
| *Jet ski* | ☐ | ☐ |
| *Kite surf* | ☐ | ☐ |

**Category AIR: What activities and services does your organisation currently offer on a regular basis?** *(Please tick all that apply)*

| | Delivered by your staff | Delivered by a sub-contractor |
|---|---|---|
| *Hot air balloon* | ☐ | ☐ |
| *Paragliding* | ☐ | ☐ |
| *Parapenting* | ☐ | ☐ |
| *Parachuting* | ☐ | ☐ |
| *ULM* | ☐ | ☐ |

**What activities and services does your organisation offer? Any other than listed before:**

**Could you please indicate how many of the following staff you have in your organisation to deliver the outdoor activities ticked above?** *(Please write in number)*

| | |
|---|---|
| *Permanent full time staff* | |
| *Permanent part time staff* | |
| *Seasonal staff* | |
| *Volunteers* | |

***Referring to all of the staff in Q4, please could you give an estimated split of their gender?*** *(Please write in an approximate percentage %)*

| | |
|---|---|
| *Male (in %)* | |
| *Female (in %)* | |

**Referring to all of the staff in Q4 please could you give an estimated split of their age?** *(Please write in an approximate percentage %)*

| | |
|---|---|
| *Under 21 (in %)* | |
| *21 to 30 (in %)* | |
| *31 to 40 (in %)* | |
| *41 to 50 (in %)* | |
| *51 to 60 (in %)* | |
| *Over 60 (in %)* | |

**Thinking of your participants numbers, which of the following best describes your organisation's offering?** *(Please tick all that apply)*

- ☐ *Outdoor Recreation*
- ☐ *Outdoor Education*
- ☐ *Outdoor Development Training*
- ☐ *Outdoor Sport Development*
- ☐ *Expeditions and exploration*
- ☐ *Adventure Therapy / Bush Craft*
- ☐ *Other*

*Please specify:*

**Who are the main participants?** *(Please tick all that apply)*

- ☐ *Individuals*
- ☐ *Families*
- ☐ *Adults only*
- ☐ *School parties*
- ☐ *Corporate*
- ☐ *Children (independent of school or family)*
- ☐ *Other*

*Please specify:*

**In total, how many participants / members use your services each year?** *(Please insert the number)*

**Could you please indicate which of the following month(s) are your high and low seasons for delivering outdoor activities during the year?** *(Please add one tick per month)*

| | High season | Low season | Closed - no activities offered |
|---|---|---|---|
| *January* | ○ | ○ | ○ |
| *February* | ○ | ○ | ○ |
| *March* | ○ | ○ | ○ |
| *April* | ○ | ○ | ○ |
| *May* | ○ | ○ | ○ |
| *June* | ○ | ○ | ○ |
| *July* | ○ | ○ | ○ |
| *August* | ○ | ○ | ○ |
| *September* | ○ | ○ | ○ |
| *October* | ○ | ○ | ○ |
| *November* | ○ | ○ | ○ |
| *December* | ○ | ○ | ○ |

**What do you consider are the main challenges facing your organisation?** *(Please tick the main challenges only and a maximum of five that apply most)*

- ☐ *Operational funding issues, for example accessing finance*
- ☐ *Lack of funding for qualifications and training*
- ☐ *Legislation and regulation*
- ☐ *Recruitment and retention of employees and volunteers*
- ☐ *Economic downturn*
- ☐ *Maintaining demand for outdoor activities*
- ☐ *Skills shortages and gaps*
- ☐ *Business development / expansion skills gaps*
- ☐ *Increasing operating costs*
- ☐ *Promotion and marketing, for example tourism bodies not understanding the sector*
- ☐ *Weather and seasonality*
- ☐ *Lack of available business support*
- ☐ *Competition from larger providers*
- ☐ *Access to land/rivers/coast issues*
- ☐ *Increasing transportation costs*
- ☐ *Other*

*Please Specify:*

**We are keen to keep you informed about the results of the survey and further information about the project, so please let us know if you would like to be re-contacted?**

- *Yes*
- *No*

**As you would like to be re-contacted, please provide your contact details:**

Your organisation's full name in English:

Your country:

Your first name:

Your surname:

Your e-mail address:

Your telephone number *(incl. International Code)*:

**Thank you very much for helping us to develop the Outdoors Sector by completing this CLO2 Census Survey!**

**Selected results will be published at http://www.clo-2.eu as soon as available.**

# 10.5. Survey FAQs (English Version)

## THE 2010 EUROPEAN OUTDOORS SURVEY – CLO2

### What is the survey?

This simple and very short survey is designed to give the outdoors and adventure industry sector something that currently does not exist. (it should only take you around 10-15 minutes to complete it.) The survey aims to give us all basic information about the outdoors sector across a wide range of 12 European countries. As you will see, the questions focus on simple factual information about your organisation, your staff and its activities. It is part of a larger European project called CLO2 to do with the capabilities needed to work in the outdoors. More information can be found here: http://www.clo-2.eu/home/

### Who should complete it?

Any organisation that offers a service to customers or participants relating to the outdoors is encouraged to complete the survey. From Question One, you will see this covers commercial, public sector, charitable/not-for-profit and voluntary organisations, such as clubs. It is ***not*** just for one narrow sub-sector of the outdoors, such as commercial employers. The outdoors also covers outdoor recreation, outdoor education, development training, expeditions etc. By "any organisation" we include freelance instructors and sole traders. We also include those who work from an outdoors centre and those who use the open countryside, rivers, hills, lakes, mountains, sea and air. Your contribution will remain anonymous and you may cancel your response whenever you want.

### What if you are a federation, governing body or outdoor network?

We would be grateful for your help in cascading this survey to your member organisations and though as many links as possible – please note, each individual organisation should only complete the survey once!

### Why should you complete it?

Increasingly, in a wide range of situations, many of us need to give a 'picture' of the outdoors as a sector. This 'picture' is of the basic information about "the micro" (at an individual organisation level) and "the macro" (at an overall regional, national and increasingly European level). This might be to help access funding locally, or making a case to governments nationally for a policy related to the outdoors. It is clear we need this kind of basic but important information. Of course, your contribution is vital – without it we do not have that important 'picture' of our outdoors industry sector. We would be delighted to share the results of the survey with everyone who completes it. See the information at the end of the survey about how to organise this.

### What will the survey information be used for… and by whom?

All information used for the survey report will be anonymous – no one organisation will be identified. As noted above anyone completing the survey will be able to have the results, if they wish. There are two main uses for the information: firstly, to support and assist any organisation that completes the survey and wants to use the results to help itself and grow and develop the outdoors; the same is true for organisations that operate at regional and national levels; secondly, as part of the CLO2 project, the 12 partner organisations will produce a national and European picture of the outdoors industry sector.

### What if I would like more information?

Should you require any further information, clarification or have any comments about the study and/or the questionnaire please do not hesitate to contact Matthias Guett (EOSE Research Manager) (matthias.guett@eose.org) or Peter Thompson (SkillsActive UK) (peter.thompson@skillsactive.com).

***We thank you in advance for your contribution!***