

Marketing Strategy 2016



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Bushwalking Victoria Inc
PO Box 1007
Templestowe Vic 3106

www.bushwalkingvictoria.org.au
[admin@ bushwalkingvictoria.org.au](mailto:admin@bushwalkingvictoria.org.au)

(03) 9846 1132



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Executive Summary

Purpose of this document

To present a marketing strategy that:

- Provides a high level statement of Bushwalking Victoria's marketing goals and objectives and the information and rationale that underpins the Strategy.
- Establishes a single framework and knowledge set for marketing activities;
- Ensures messages are properly formulated for the right audiences through the right channels; and
- Maximises alignment with strategic plan, and often better informs the next iteration of the strategic plan.

Key Insights: Concerns and Opportunities

Research identified some key issues that affect the long term viability of Bushwalking Victoria and its member clubs and many opportunities that will assist in addressing these issues. The issues, and to a lesser extent, opportunities largely confirm anecdotal evidence from within the bushwalking community on how demographic trends are affecting clubs.

Key Issues:

- Aging of club membership. The 76+% of club members are aged 55 or older compared to just 32.5% in the broader bushwalking community;
- Overall club membership numbers are not increasing as Victoria's population increases nor as increasing numbers of people enter into pre-retirement or retirement age brackets, the most likely age groups to consider joining a bushwalking club. Less than 4% of people who bushwalk in Victoria belong to Clubs;
- 60% of member clubs have static or declining membership numbers;
- Generation Y (now aged 22 to 36) and Millennials (now aged 7 to 21) are less likely to join clubs than earlier generations;
- People are still volunteering but are offering fewer hours of volunteer time to the causes they support; and
- Bushwalking Victoria has not fully developed a capacity to influence decision makers. Board Executive members, BSAR and BTAC have all established very good relationships at the operational level with key stakeholder organisations but there is limited ability to influence senior decision makers.

Key Opportunities:

- 50% of people who claim to bushwalk in the general community are aged 34 to 54 and this group should be a rich source of current and future club members, especially as they grow older;
- Concern about obesity levels are creating opportunities to partner with other organisations and obtain funding to target this problem, particularly for children;
- The number of volunteers in the 15 to 34 age groups is higher than the 65-69 age group who might be expected to have more time for volunteering. So this younger age group would also be worth increased focus for recruitment and volunteering, especially for BSAR and BTAC activities;



80+% of club members are aged 55 or older compared to just 32.5% in the broader bushwalking community

- Australian Bureau of Statistics surveys show that bushwalking is an activity undertaken by people in all age groups. The majority of people surveyed only bushwalked for half a day or less. There is an opportunity to encourage these people to walk more often and/or for longer distances, that is increase their participation;
- A number of issues exist that Bushwalking Victoria can address through advocacy campaigns including:
 - Usage of our parks is increasing considerably – it will double in 7 years. Are our parks ready to cope with this? Is the park funding model sustainable?
 - Economic value of the outdoor recreation industry is significant and worth government support and investment especially in regional areas
 - Conservation issues such as Sambar Deer

Stakeholders, Competitors and the Market

Bushwalking compares well with its identified competitors, which are other activities that people spend valued 'spare time' doing. Characteristics and features, especially points of difference in favour of bushwalking, can be highlighted in promotional activities. They also help clarify what bushwalking is, provide potential messages for advocacy and marketing initiatives and help to better explain why people should support bushwalking.

BWV has developed a Walking Life Timeline based on the published research of various organisations. This needs to be tested in pilot programmes to determine its validity and effectiveness in guiding promotion campaigns. The development of, and profiling of target groups provides an insight into the needs of potential walkers based on age and various "stage-of-life" factors. It also allows targeting of messages to specific audiences.

Marketing Strategy

The strategy consists of two separate strands, each of which addresses different stakeholders:

- Advocacy – Focusing on Government
- Marketing – Focusing on the market (i.e. potential bushwalkers and members)

Both of these elements are focussed around achieving Bushwalking Victoria's mission: *To inspire more people to walk in natural areas for enjoyment, health, wellbeing and appreciation of the Victorian environment.*

These separate strands are to be developed and documented as:

- BWV Advocacy Plan; and
- BWV Marketing Plan.

Advocacy

BWV advocacy activities seek to influence or persuade decision makers, especially governments, on matters that affect bushwalkers, potential bushwalkers and the places where they walk. While considerable work has been done since BWV was established in 2006, greater focus needs to be placed on establishing good relationships with senior decision makers.

50% of people who claim to bushwalk in the general community are aged 34 to 54 and this group should be a rich source of current and future club members

Advocacy goals

In seeking to influence decision makers, Bushwalking Victoria's advocacy efforts will have two goals:

- Victoria is recognized for its varied bushwalking opportunities and comprehensive track network (Goal 2 of Strategic Plan 2103); and
- Bushwalking Victoria and its member clubs are well resourced and effective organisations that support the bushwalking community (Goal 3 of Strategic Plan 2103).

Marketing

Bushwalking Victoria has not conducted any systematic marketing activities but has some elements of a marketing plan in place. For instance, it has updated branding, a good website (improvements needed) and a presence on social media.

Marketing Goals

It now needs to develop and implement a long term integrated strategy with the following goals:

- Increased participation in bushwalking.
This is Goal 1 of Strategic Plan 2013: *Bushwalking is a popular activity recognized by the community as enjoyable, healthy, environmentally responsible and safe*; and
- Increased membership in bushwalking clubs and Individual members of Bushwalking Victoria.
This is Goal 3 Strategic Plan 2103: *Bushwalking Victoria and its member clubs are well resourced and effective organisations that support the bushwalking community*.

An integrated Marketing Plan is essential if we are to fulfil our mission of *inspiring more people to walk in natural areas for enjoyment, health, wellbeing and appreciation of the Victorian environment*.

Review of Marketing Strategy

The Marketing Strategy and subsidiary plans should be reviewed on a regular basis to ensure they remain aligned with Bushwalking Victoria's Strategic Plan. Reviews should occur annually for the first few years when it is expected that 'lessons learnt' may result in significant changes to the Strategy. A review should also be conducted each time the Strategic Plan is significantly altered or redone.

The Marketing Strategy has 2 key components:

Advocacy (influencing decision makers); and

Marketing (increasing participation and membership)



PART 1: BACKGROUND

About Bushwalking Victoria

Bushwalking Victoria is the peak body that proactively represents the interests of all who walk in natural areas in Victoria. We proactively advocate on behalf of bushwalkers, contribute to track and conservation activities, provide highly skilled bushwalkers to assist Police with bush search and rescue and support our members.

We directly represent about 9,000 people who belong to our 65 member clubs or are Individual Members. More generally we advocate for the many people from Victoria, interstate or overseas who walk in natural areas in Victoria.

Bushwalking Victoria is a not for profit, incorporated association run mainly by volunteers. It was established in 1934 as the Federation of Victorian Walking Clubs and changed its name to Bushwalking Victoria in 2006 to better reflect its key area of interest. We rely on membership fees and small government grants to fund our activities.

Purpose

Bushwalking Victoria exists to:

- Safeguard and advance the common interests of all bushwalkers;
- Promote safe and environmentally responsible recreational bushwalking and its benefits to the community;
- Maintain for the benefit of the community as a whole, a volunteer specialist search and rescue group to assist in land based searches for persons lost in Victoria;
- Promote and actively work for the conservation and effective management of the environment including national and state parks, wilderness and other public land areas to enhance their bushwalking value to the community;
- Work with other organisations having like interests; to assist with the development, maintenance and protection of the integrity and accessibility of walking tracks, so as to enhance their recreational bushwalking value for all; and
- Publish information regarding safety, preservation of the environment, walking routes and other subjects of interest to all bushwalkers in the community.

Bushwalking Victoria is a not for profit, incorporated association run mainly by volunteers

Vision, Mission and Goals

- **Vision: Better Bushwalking for Victoria**

A large and diverse bushwalking community enjoying world class walking opportunities across a wide range of Victorian landscapes.

- **Mission: To inspire more people to walk in natural areas for enjoyment, health, wellbeing and appreciation of the Victorian environment.**

Goals

- **Goal 1:** Bushwalking is a popular activity recognized by the community as enjoyable, healthy, environmentally responsible and safe

- **Goal 2:** Victoria is recognized for its varied bushwalking opportunities and comprehensive track network
- **Goal 3:** Bushwalking Victoria and its member clubs are well resourced and effective organisations that support the bushwalking community

Values

- Honesty, integrity, openness and responsiveness in our dealings;
- Inclusiveness of and respect for all we relate to and partner with;
- Respect of and love for the natural environment we walk in;
- Utilising our knowledge and skills for the greater community good; and
- Safety in everything we do.

Imperatives

- Value to members and the community;
- Building an effective sphere of influence;
- Best practice management and governance;
- Recognition of the role of the club network and members / supporters and their dedication to the cause.

Current Membership

9000 members in three categories:

- Affiliated Members – 65 clubs where the main activity is bushwalking
- Associate Members - 8 organisations or clubs whose activities include bushwalking
- Individual Members – 370 (approx.)

What is Bushwalking?

Bushwalking Victoria defines bushwalking' very broadly as a wide spectrum of recreational walking experiences in natural or green areas. It includes:

- Local walking through natural areas in an urban or town environment such as local parks or green zones along creeks or old railway tracks. These walks are typically very easy and short and are an excellent way to spend time in natural areas on a regular basis. They also provide an excellent way to start bushwalking before moving on to longer walks further away from home.
- A part day or full day walk in a national park, reserve, forest or other natural area. The difficulty of these walks can vary from easy walks taking around two hours ('GreenWalks') through to bushwalks taking 4 to 6 hours of varying levels of difficulty to hard / challenging bushwalks taking 6 to 8 hours.
- A multi-day pack carrying walk in a national park, reserve, forest or other natural area where the walker is usually self-sufficient carrying a tent and your food. In some instances, walkers may use huts instead of tents.
- A multi day walk where you can stay in commercial accommodation each night rather than being fully self-sufficient.

Bushwalking Victoria defines bushwalking' very broadly as a wide spectrum of recreational walking experiences in natural or green areas.

Diagram 1. - The Bushwalking Spectrum

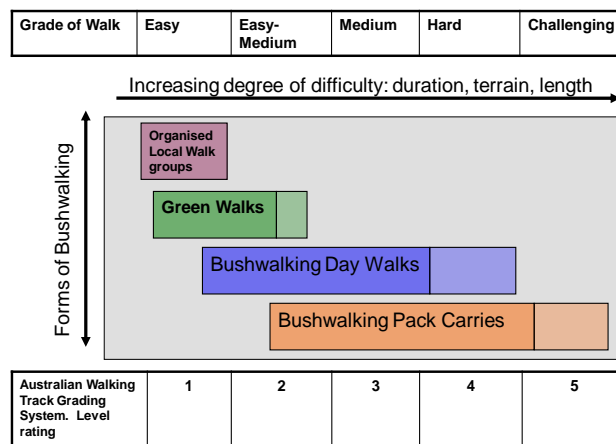


Diagram 1: Bushwalking Spectrum

Bushwalking occurs in a very broad range of natural environments:

- Urban parks and walking tracks e.g. Jells Park (also called Green Walks);
- Beaches and Rivers e.g. Merri Creek in the Melbourne metropolitan area;
- Hills and mountains e.g. The Alpine National Park, The Grampians;
- Plains or desert areas e.g. Big Desert National Park, Wyperfeld National Park; and
- In historic areas e.g. gold diggings, along old tramways used to remove timber, rail trails etc.

Bushwalking does not include:

- Walking to/from transport
- Walking to/from school or work
- Walking in built environments

These natural environments can be owned or managed by a range of land managers, including:

- National parks (managed by state government);
- State parks and forests (state government);
- Shire or Council reserves and parks; and
- Water Catchment Authorities.

Conclusion

Bushwalking has much to offer people of all ages and is one of the very few outdoor recreational activities that can be:

- A life-long pursuit that can be coupled with other interests such as photography, flora and fauna;
- Inclusive and supports diversity along all its dimensions;
- Non-competitive, but offers the opportunity for self-challenge;
- Inexpensive compared to sports and many other recreations;
- Time and location flexible

There is a good story to tell and one that is in alignment with priorities announced by government, health and tourism agencies.

What assumptions have been made?

In developing this Strategy, a number of assumptions were made. They are that:

- Limited resources (funds and people) will be available from Bushwalking Victoria supplemented by a small annual grant from Sport and Recreation Victoria for the period 2016 to June 2019. Therefore, promotional activities will need to be carefully targeted and have clear objectives. Ideally BWV will partner with other organisations to maximise effectiveness of any given level of commitment;
- Strategy and specific activities will be based on existing data, mainly gathered during the development of the current Strategic Plan. Findings from more recent studies by other organisations will also be incorporated into the planning; and
- A re-branding initiative was completed in 2013 and will not be revisited as part of the Communications and Marketing Strategy or related Plans.

Alignment with Bushwalking Victoria's Strategic Plan

The Marketing Strategy is being developed under the "Promoting Bushwalking" project which is in the Strategic Plan 2013 as:

Goal 1: Bushwalking is a popular activity recognized by the community as enjoyable, healthy, environmentally responsible and safe

- **Strategy 1:** Promote bushwalking as an activity suitable for all ages as part of a healthy lifestyle
 - **Objective 1:** Create an image for 'bushwalking' that highlights enjoyment, health, well-being benefits and safety
 - **Objective 2:** Create a program to educate the public and decision makers about, and promote, bushwalking.

Review of Marketing Strategy

The Marketing Strategy and subsidiary plans should be reviewed on a regular basis to ensure they remain aligned with Bushwalking Victoria's Strategic Plan.

Reviews should occur annually for the first few years when it is expected that 'lessons learnt' may result in significant changes to the Strategy. A review should also be conducted each time the Strategic Plan is significantly altered or redone.

The Marketing Strategy and subsidiary plans should be reviewed on a regular basis to ensure they remain aligned with Bushwalking Victoria's Strategic Plan



PART 2: KEY INSIGHTS: ISSUES AND OPPORTUNITIES

This section of the reports sets out the project team’s findings from reviewing existing activities, researching trends and developing key insights based on these finding. All these findings provide valuable input and are the basis for developing our Communications and Marketing Strategy.

For more complete details on the findings that underpin the key insights set out below, please refer to Appendix C.

The key insights have been divided into two categories -issues of concern and opportunities as these form the basis of the Strategy set out in Part 4.

Issues of concern

The research conducted by the Working Group has identified a number of issues of concern and which should be addressed if Bushwalking Victoria and its member clubs are to be viable and flourish in the future.

The key concerns identified are described below.

BWV and Member Clubs

- Aging of club membership. The 76+% of club members are aged 55 or older compared to just 32.5% in the broader bushwalking community. There has been a steady reduction in the number of members aged 35 to 54. Member clubs have expressed concern about this issue at annual Leaser Forums over a number of years. Clubs have difficulty in filling positions on their committees and finding walk leaders;

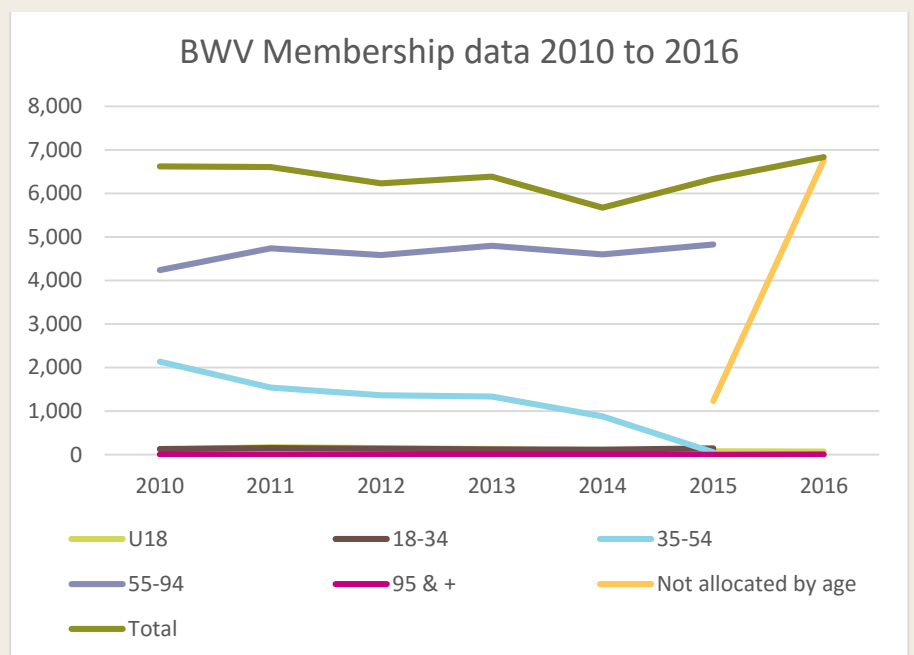


Diagram 2: Bushwalking club membership numbers

There has been a steady reduction in the number of members aged 35 to 54

- 60% of BWV member clubs have static or declining membership when comparing figures from 2010 to 2016;
- Image of bushwalkers who belong to bushwalking clubs – ‘daggy’, ‘uncool’, ‘too regimented’, too slow, stop too often, ‘old scouts’, ‘old fellas in shorts’ - was identified in market research conducted in 2012;
- Less than 0.5% of people who bushwalk in Victoria belong to Clubs. Overall club membership numbers are not increasing as Victoria’s population increases nor as increasing numbers of people enter into pre-retirement or retirement age brackets, the most likely age groups to consider joining a bushwalking club. While not everyone will want to join a club or Bushwalking Victoria, we should be reaching more bushwalkers and potential bushwalkers;
- Generation Y (born between 1980 and 1994, now aged 22 to 36) are less likely to join clubs than earlier generations. The characteristics of this generation are independence and strong focus on work-life balance including putting family before work;
- Millennials’ (born between 1995 and 2009, now aged 7 to 21) will also be less likely to join clubs. Characteristics include focus on the short term not long term, enjoyment before commitment and outcomes not processes.

Volunteers

- People are still volunteering but are offering fewer hours of volunteer time to the causes they support. This confirms anecdotal evidence from member clubs that retirees are increasingly reluctant to commit to roles requiring significant periods of time – many have worked all their lives and now wish to travel or relax and let others do the work. Caring for older parents and/or grandchildren are additional pressures.
- The number of volunteers in the 60 to 74 age groups decreases and may reflect that time is spent looking after grandchildren rather than on community activities.

Advocacy/Influencing Decision Makers

- Bushwalking Victoria has not fully developed a capacity to influence decision makers. Board Executive members, BSAR and BTAC have all established very good relationships at the operational level with key stakeholder organisations. Focus now needs to expand to increase our ability to influence senior decision makers,

Opportunities

There are a number of significant opportunities that Bushwalking Victoria and its member clubs can pursue to address concerns about future viability.

Increasing participation in bushwalking and bushwalking clubs

- 50% of people who claim to bushwalk in the general community are aged 34 to 54 and this group should be a rich source of current and future club members, especially as they grow older
- Parks Victoria statistics show increasing use of parks and participation in bushwalking and that the rate of increase is itself increasing. This indicates an increasing level of interest in spending time in green spaces.

Less than 0.5% of people who bushwalk in Victoria belong to Clubs

- Exercise, Recreation and Sport Survey 2010 (ERASS) shows that bushwalking is an activity undertaken by people in all age groups. The majority of people surveyed only bushwalked for half a day or less. There is an opportunity to encourage these people to walk more often and/or for longer distances

Health

- 63% of Australian are overweight, including 24% of children. Driven by public health awareness campaigns, the number of individuals engaging in a more active lifestyle is increasing.
- Concern about obesity levels are creating opportunities to partner with other organisations and obtain funding to target this problem, particularly for children. There is also concern about the time children and young people spend on e-gadgets of various types;
- Walking in Victorian parks avoided an estimated \$63 million of healthcare costs according to a report published by Outdoors Victoria and Sport and Recreation Victoria in 2016. Healthcare costs are reduced by about \$4 for each hour of walking in natural areas. (15)
- Multiple research studies have identified health benefits from exercising in green spaces for both physical and mental health. Research into other areas, such as effects of 'green buildings', can provide supporting evidence from a different perspective

Volunteering

- Volunteering statistics indicate that the largest number of volunteers are in the 40-49 age group – likely to be parents volunteering to support schools and recreational activities of their children. However, it may indicate that it would be worth trying to target this age group to become members and to volunteer
- The number of volunteers in the 15 to 34 age groups is higher than the 65-69 age group who might be expected to have more time for volunteering. So this younger age group would also be worth increased focus for recruitment and volunteering, especially for BSAR and BTAC activities

Advocacy/Influencing Decision Makers

A number of issues exist that Bushwalking Victoria can address through advocacy campaigns including:

- Usage of our parks is increasing considerably – it will double in 7 years. Growth is mostly driven by tourism (intrastate, interstate and overseas). Are our parks ready to cope with this? Is the park funding model sustainable?
- Economic value of the outdoor recreation industry is significant and worth government support and investment especially in regional areas
- Conservation issues such as Sambar Deer

Technology

- Social media and well-designed websites makes it feasible to connect with people who bushwalk relatively easily and inexpensively. It also enables good tracking of engagement with walks and data collection.

Bushwalking has much to offer people of all ages



PART 3 STAKEHOLDERS, COMPETITORS AND MARKET

This section looks at the key stakeholders, considers how Bushwalking Victoria compares to our competitors and potential target markets.

Who are our key stakeholders?

For the purposes of this Strategy, four key stakeholder groups have been identified:

- Member Club Leadership
- Members – of Affiliate Clubs, Associate Clubs and Individual Members
- Government / other land managers
 - Federal (not a major player in bushwalking but their actions may have occasional impact)
 - State (the key player as it manages the main areas where bushwalkers walk)
 - Local (important as they manage local parks where many people walk on a regular basis)
- Partners – while BWV has no formal partners at present, this may change with the implementation of the Communications and Marketing Strategy.

Each Stakeholder group has different issues that drive their interests and actions and therefore relate to the Marketing Strategy in varying ways. These are explored in Table 1 below.

Who are our competitors?

People have limited time for personal or recreational activities and bushwalking needs to be able to attract people from these alternative activities. Anything that people do in their 'spare' time is a competitor. By identifying potential competitors, Bushwalking Victoria will be better able to develop messages that motivate people to get and go walking.

The following groups have been identified as competitors to bushwalking:

- Hobbies or past-times that consume significant time or do not require much physical activity. Could include tourism activities such as visiting wineries or day spas
- Fitness activities, competitive or non-competitive e.g. gym, exercise classes
- Competitive sporting pursuits, including indoor sports.
- Active and extreme sports or pursuits
- Motorised bush recreation (4WD and trail-bikes).
- Mountain biking.
- Water sports in natural areas
- Individuals/groups who are influenced by, or are themselves negative or indifferent about outdoor or active pursuits, and perhaps social engagement

People have limited time for personal or recreational activities and bushwalking needs to be able to attract people from these alternative activities

Stakeholder	Drivers / Concerns / What matters	Link to Marketing Strategy
Club Leadership (Executive and Committee members, key club roles such as walk coordinators)	<ul style="list-style-type: none"> • Club viability and growth • Safety • Walking program • Sharing of information • Delivering value for money on membership 	<ul style="list-style-type: none"> • Advocacy • Marketing
BWV Individual Members	<ul style="list-style-type: none"> • Personal health and safety • Information on walking and where to walk • Value for money on membership 	<ul style="list-style-type: none"> • Advocacy • Marketing
Club Members	<ul style="list-style-type: none"> • Personal health and safety • Social connection • Walking program to meet needs • Information on walking and where to walk • Value for money on membership 	<ul style="list-style-type: none"> • Advocacy
Government – Federal (not a key player in bushwalking)	<ul style="list-style-type: none"> • Health • Tourism • Environment • Economy 	<ul style="list-style-type: none"> • Advocacy
Government – State	<ul style="list-style-type: none"> • Health • Tourism • Environment • Economy 	<ul style="list-style-type: none"> • Advocacy • Marketing
Government – Local	<ul style="list-style-type: none"> • Health • Local Economy/Business 	<ul style="list-style-type: none"> • Advocacy • Marketing
BWV Partners	<ul style="list-style-type: none"> • Being associated with a growing community of walkers with aligned interests – strength in numbers. 	<ul style="list-style-type: none"> • Marketing

Table 1: Key stakeholders, their drivers and relevant aspects of the Strategy

Positioning against competitors

Table 2 below looks at how bushwalking compares to its competitors and where there are similarities or points of difference in their favour or bushwalking's favour.

Bushwalking compares well with its competitors

The table demonstrates bushwalking compares well with its competitors and provides a list of features (points of difference in favour of bushwalking) that can be highlighted in promotional activities. It also helps clarify what bushwalking is and potential messages for advocacy and marketing initiatives and to better explain why people should support bushwalking.

Competitors	Points of parity	Points of difference in their favour	Points of difference in our favour
<ul style="list-style-type: none"> • Hobbies or past-times that consume significant time or do not much require physical effort. • Fitness activities • Competitive sporting pursuits, including indoor sports. • Active and extreme sports or pursuits • Motorised bush recreation (4WD and trail-bikes). • Mountain biking. • Water sports in natural areas • Tourism activities featuring indoor activities e.g. wineries, spa and relaxation getaway's etc. 	<ul style="list-style-type: none"> • Can take up similar time • Can be flexible on duration • Can take you to scenic locations • Can be social, especially after the activity • Well organised and safe (except for more extreme activities) • Can require no prior commitment (DIY activity) for solo walkers or small groups 	<ul style="list-style-type: none"> • Can require no prior commitment (DIY activity) • May take up less time (in comparison to a half or all day bushwalk but can walk for shorter periods). • Can appeal to those who want a more physical experience • Can be more exhilarating and/or exciting • Technical and "geeky" nature may appeal to some • Appeals to petrol-heads • Typically, younger children don't enjoy walking more than an hour or so – some other activities may be easier for young families 	<ul style="list-style-type: none"> • Less expensive than most outdoor activities • Better able to reach varied and hard-to-reach scenic locations • No formal training commitments • Lower "team" commitment – can be an individual or a 'team' of any size • Fund raising is optional • Not competitive or aggressive • Lower impact on the body • Lower risk of injury • Organised activities – Just turn up (but need to book) • Inclusive and social during the activity • Safe, healthy and life-long recreation

Table 2: How bushwalking compares to its competitors

Where Bushwalking Victoria has areas of common or similar interests with competitors e.g. love of the bush, there are opportunities to partner with potential competitors.

For instance, BWV's Bush Track And Conservation (BTAC) volunteers have teamed up with 4WD clubs to access more remote areas in order to undertake track work.

Who is our market?

A target “market” is a group of people with similar characteristics who would/could benefit from learning about bushwalking and participating in this recreation. Target markets or groups are commonly referred to as Market Segments.

BWV has developed a Walking Life Timeline based on published research of various organisations as listed in Appendix 2. This needs to be tested to determine its validity and effectiveness in guiding promotion campaigns.

It does not specifically address Culturally and Linguistically Diverse (CALD) groups who may need a separate profile which can be developed as we better learn their needs and interests. However, the Walking Life Timeline does not specifically exclude CALD groups and it is expected that some or all of the age related characteristics will also apply to CALD groups.

The development of target groups and profiling their key characteristics provides an insight into the needs of potential walkers based on age and various “stage-of-life” factors. This in turn allows targeting of messages to specific audiences.

See Bushwalking Victoria’s Marketing Plan for more details on target group profiles and initial messaging.

Tag	‘Me Spirits’	Mature free spirits	Young families	Mature families	Pre retirees	Retirees	Veterans
Age	18-24	25-35	30-45	40-55	55-65	60-75	75+
Stage of Life	Single, social adventurers. It is about “me” and I want it “now”.	Single, social, healthy, career builders. Looking to build life partnerships	Married, starting families, time poor, busy social life	Married (or separated), independent children, capitalising on career	Married or Single, empty nesters, contemplating retirement, wanting to stay active and diversify socially. Travellers	Married or Single. Either are, or are looking to be socially connected and active, older children, possibly grandparents Extended travellers	Married or Single. Valued friendship groups, staying active and healthy. Less adventurous travel.

Table 3: The Walking Life Timeline

PART 4: MARKETING STRATEGY

What is a marketing strategy?

A marketing strategy provides guidance for achieving an organisation's vision and goals. It is a way to become more convincing and of engaging people in a conversation about why a cause (i.e. bushwalking) is important. To be effective it must stay true to the BWV mission, present the organisation honestly and only promise what can be delivered. It will help Bushwalking Victoria decide how to allocate its communications and marketing dollars for the best results.

More specifically

- Ensures advocacy and marketing activities are aligned with the strategic plan;
- Collects and synthesises trend and other market data to help frame existing and new opportunities, and challenges, which may be addressed in achieving the organisations vision, mission and goals;
- Creates a common understanding of stakeholders and the market by segment, including the needs, wants and potential concerns of walkers;
- Ensures that offerings and experiences are imagined, created, positioned, priced and promoted in such a way that they will help Bushwalking Victoria achieve its goals and targets; and
- Ensures that marketing campaigns are developed and executed in a way that is consistent with the overall marketing strategy, and that the right messages reach the right audiences through the right channel in the right timeframe.

Our strategy must connect the needs and motivations of potential walkers and key stakeholders with experiences offered by bushwalking.

While this Strategy and the two supporting Plans do not specifically address public relations activities or communications with clubs, they do provide some useful material that can be used for these purposes.

Imperatives underlying Strategy

In developing this Strategy, the Working Group was mindful of the applicability of Bushwalking Victoria's Imperatives:

- Value to members and the community;
- Building an effective sphere of influence;
- Best practice management and governance;
- Recognition of the role of the club network and members / supporters and their dedication to the cause.

In relation to the club network the Project Team wanted to ensure that the Strategy and activities identified in supporting Plans would support and complement club activities and not be in competition, especially promotional and recruitment project.

A Two Pronged Strategy

The strategy consists of two separate strands, each of which addresses different stakeholders:

- Advocacy Plan – Focusing on Government



Our strategy must connect the needs and motivations of potential walkers and key stakeholders with experiences offered by bushwalking

- Marketing Plan – Focusing on the market (i.e. potential bushwalkers and members)

Both of these elements are focussed around achieving Bushwalking Victoria's mission: *To inspire more people to walk in natural areas for enjoyment, health, wellbeing and appreciation of the Victorian environment.*

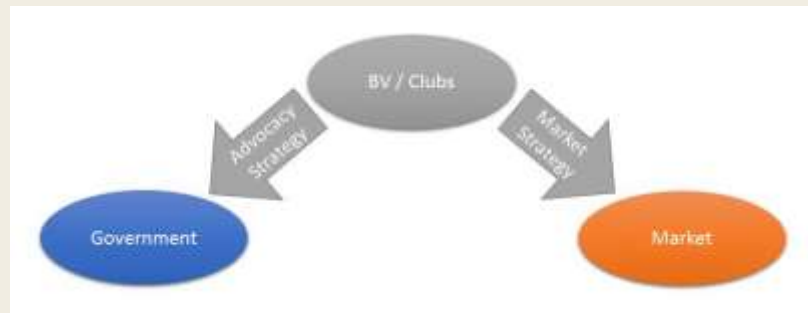


Diagram 3: Two pronged marketing strategy

Collaborating with interested member clubs

In pursuing these two approaches, the work of connecting with key stakeholders will be shared between Bushwalking Victoria and interested member clubs. In particular:

- Advocacy
 - Bushwalking Victoria will primarily work with State government, and also with the Federal government if required
 - Bushwalking Victoria will seek partners and allies to achieve shared outcomes
 - Bushwalking clubs will primarily work with Local government on matters of relevance to that club
- Marketing
 - Bushwalking Victoria will focus on those potential bushwalkers aged between 18 and 55, as these groups are less likely to join bushwalking clubs; and
 - Member clubs will focus primarily on potential bushwalkers aged 40 and older as people in these age groups are most likely to join a bushwalking club

These are very broad guidelines and are not intended to restrict the activities of member clubs or Bushwalking Victoria. The intention is to undertake complementary activities rather than work in competition with each other.

These strategies need to be integrated to ensure that individual communications and marketing initiatives are linked back to achieving the Vision, Mission and Goals of BWV, and associated Clubs. One-off campaigns that are not clearly linked to the overall strategy will not be as effective as those integrated into a structured set of activities. BWV can advise and assist clubs with tips and messages.

BWV plans need to be measured, and lessons learnt, to ensure value is delivered to all stakeholders in the long term. The outcomes need to be measured against our criteria for success, and plans adjusted as knowledge base improves.

Connecting with key Stakeholders will be an activity shared between Bushwalking Victoria and interested member clubs

This document concentrates on developing the communications and market strategy. It will be supported by plans for advocacy, marketing and partnering with clubs.

Advocacy Plan

BWV advocacy activities seek to influence or persuade decision makers, especially governments, on matters that affect bushwalkers, potential bushwalkers and the places where they walk. While considerable work has been done since BWV was established in 2006, greater focus needs to be placed on establishing good relationships with senior decision makers.

Advocacy goals

In seeking to influence decision makers, Bushwalking Victoria's advocacy efforts will have two goals:

- Victoria is recognized for its varied bushwalking opportunities and comprehensive track network (Goal 2 of Strategic Plan 2103); and
- Bushwalking Victoria and its member clubs are well resourced and effective organisations that support the bushwalking community (Goal 3 of Strategic Plan 2103).

This work is critical if we are to achieve our vision of Better Bushwalking for Victoria: *A large and diverse bushwalking community enjoying world class walking opportunities across a wide range of Victorian landscapes.*

The scope of advocacy activities includes, but is not limited to:

- Goal: Victoria is recognized for its varied bushwalking opportunities and comprehensive track network
 - Development and maintenance of bushwalking tracks and any policies or practices relating to these such as sharing of tracks;
 - Infrastructure issues– camps, facilities, access roads
 - Commercial development in or near national and state parks;
 - Conservation activities, particularly as they impact on bushwalkers and the bushwalking experience;
 - Resourcing and management of organisations responsible for natural areas used by walkers, including Parks Victoria. Usage of our parks is estimated to double in 7 years. Growth is mostly driven by tourism (intrastate, interstate and overseas). Are our parks ready to cope with this? Is the park funding model sustainable?
- Goal: Bushwalking Victoria and its member clubs are well resourced and effective organisations that support the bushwalking community
 - Legislation and regulations relating to management of incorporated and/or recreational organisations;
 - Insurance legislation;
 - Activity Standards, Risk Management or other practices that may or do impact on bushwalkers and bushwalking clubs.

Bushwalking Victoria will develop an Advocacy Plan that addresses this aspect of the overall strategy in detail.

Marketing Plan

Bushwalking Victoria has not conducted any systematic marketing activities but has some elements of a marketing plan in place. For instance, it has updated branding, a good website (improvements needed) and a presence on social media.

Advocacy seeks to influence or persuade decision makers, on matters that affect bushwalkers, potential bushwalkers and the places where they walk

Marketing Plan Goals

BWV now needs to develop and implement a long term integrated strategy with the following goals:

- Increased participation in bushwalking.
This is Goal 1 of Strategic Plan 2013: Bushwalking is a popular activity recognized by the community as enjoyable, healthy, environmentally responsible and safe; and
- Increased membership in bushwalking clubs and Individual members of Bushwalking Victoria.
This is Goal 3 Strategic Plan 2103: Bushwalking Victoria and its member clubs are well resourced and effective organisations that support the bushwalking community.

An integrated Marketing Plan is essential if we are to fulfil our mission of *inspiring more people to walk in natural areas for enjoyment, health, wellbeing and appreciation of the Victorian environment.*

Marketing approach

BWV needs to *connect* potential bushwalker's needs and motivations with our experiences, while overcoming the barriers by:

- Communicating the right messages to their stage of life (use *Walk Life Timeline* personas)
- Aligning promotion channels with *Walk Life Timeline* personas
- We must be responsive at point of contact
- We must make it easy to get started both as a bushwalker and as a BWV member

We must take them on a journey.

Where possible BWV should use its website, Customer Relationship Management (CRM) system and social media capabilities to 'automate' processes and activities.

What journey?

- **Start** the experience – move people from 'Stranger' to 'Suspect' and then to 'Prospective Participant':
 - 'Stranger' – people do not know BWV and don't know why they might need BWV. Focus on addressing their concerns and challenges before they need BWV;
 - 'Suspect' – They now know about BWV but are not sure how BWV can help them. Focus on sharing a path or process to how BWV can help overcome their obstacles;
 - 'Prospective Participant' – People know BWV, know how BWV can help them but now need the 'nitty gritty'. Focus on how BWV can achieve their goals better than the competitors;
- **Grow** the experience – move people from 'Prospective Participant' to 'Participant'. Focus on how BWV can help create their ideal situation;
- **Extend** the experience – Treat 'Participants' as VIPs to build the connection and enthusiasm for bushwalking. Build interest in the environment and the joys of walking in the Victorian bush; and
- **Connect** and **Share** the experience – 'Participants' become 'Champions' and 'promote' bushwalking to others.

Bushwalking Victoria will develop a Marketing Plan that addresses this aspect of the overall strategy in detail.

We must take them on a journey

PART 5: CONCLUSION

A number of issues of concern have been identified which may affect the long term viability of Bushwalking Victoria and its member clubs. However, the Project Team have also identified a range of opportunities that provide ways of addressing these concerns.

Stakeholders, competitors and groups of potential bushwalkers have been identified and their characteristics have been explored.

Using this information Bushwalking Victoria will address the issues and opportunities by adopting a Marketing Strategy. The key elements of the two pronged Marketing Strategy are

- Advocacy Plan – Focusing on Government; and
- Marketing Plan – Focusing on the market (i.e. potential bushwalkers and members)

In pursuing these two approaches, the work of connecting with key Stakeholders will be shared in a collaborative manner between Bushwalking Victoria and interested member clubs.

Separate, but integrated, plans will be developed setting out in detail the activities and their implementation.

Both of these elements are focussed around achieving Bushwalking Victoria's mission: *To inspire more people to walk in natural areas for enjoyment, health, wellbeing and appreciation of the Victorian environment.*



Bushwalking Victoria will address identified issues and opportunities by adopting a Marketing Strategy

Appendix A: Definitions

Advocacy: Activities seek to influence or persuade decision makers, especially governments, on matters that affect bushwalkers, potential bushwalkers and the places where they walk.

Bushwalking Community: this term is used very broadly. It includes not only the BWV organisation, clubs, members, volunteers and supporters but all organisations and members of the public with an interest in bushwalking.

Campaign: A single initiative or set of actions to achieve a promotional goal, with specific messages aimed at (a) specific audience/s through (a) specific channel/s

Goals: statement of the ultimate outcome(s) the organisation hopes to achieve. Goals are broad statements of what will be achieved if all related objectives are met

Market: A set of potential customers which we would consider targeting our offerings and experiences

Marketing: A process or function which ensures the organisation's strategy, offerings and experiences are aligned with the needs and wants of the market and other stakeholders (ensures people want what you offer, even before they know it). Not selling.

Mission: The purpose(s) for which the organisation exists. The mission statement is closely related to the vision, but describes purpose and focus rather than outcome

Public Relations: The deliberate, planned and sustained effort to establish and maintain a favourable public image by a company or other organization

Objectives: are linked to specific goals, and represent the necessary, measurable and specific steps or changes needed to achieve those goals

Values: A statement of the principles and ethical considerations that guide the organisation. Values statements are descriptive, general and broad

Vision: A description of the desired state or ultimate condition we are working to achieve. The vision statement should be general, visionary and brief

The table below compares and contrasts goals, strategies and objectives (source: roundworldmedia.com – instructors notes) (adapted).

Goal	Objective
Broad	Specific (what)
General/Intentional	Precise and measurable
Intangible	Tangible
Abstract	Concrete
Can't be directly validated or measured	Can be validated or measured

Appendix B: References

1. “Communicating with Trail Users”; Parks Victoria
2. “Brand Identity Creative Brief”, especially Appendix C, “Summary of Market Research Findings”. Bushwalking Victoria, Oct 2013.
3. Australian Health Survey: First results 2014-15 (series 4363.0.55.001). Australian Bureau of Statistics, March 2016.
4. Victorian Public Health and Well Being Plan 2015-19
5. Female Participation in Sport and Physical Activity, 2014. VicHealth, August 2015.
6. Beyond Blue to Green: The benefits of contact with nature for mental health and wellbeing (literature review). Beyond Blue. 2010
7. Migrants and participation in sport and physical activity, Australian Bureau of Statistics, 2006.
8. Participation in Sport and Recreation by Culturally and Linguistically Diverse Women. SPRC Report 8/08. Social Policy Research Centre June 2008.
9. Exercise Recreation and Sport Survey 2010. Australian Sports Commission and State/Territory Departments of Sport & Recreation, 2010.
10. Sports and Physical Recreation: A Statistical Overview, Australia, 2011 (series 4156.0). Australian Bureau of Statistics, 2012
11. Valuing Victoria’s Parks: Accounting for ecosystems and valuing their benefits: Report of first phase findings, Parks Victoria and Department of Environment, Land, Water and Planning
12. National Volunteering Strategy. Department of Prime Minister and Cabinet, 2011.
13. State of Volunteering in Australia 2012, Volunteering Australia, 2012
14. Report on Survey of Club Committees. Bushwalking Victoria, 2012
15. Report on Survey of Club members. Bushwalking Victoria, 2012
16. Motivations, Barriers and Opportunities Among People Who Bushwalk in Victoria. Research Report Prepared for Bushwalking Victoria. Kerry Alexander Research, December 2012
17. Victoria’s Nature-based outdoor economy: key estimates and recommendations. Marsden Jacob Associates for Outdoor Victoria and Sport and Recreation Victoria, January 2016
18. Adventure Tourism Market Profile Year Ending June 2014. Tourism Victoria Research Unit – November 2014
19. Nature-Based Market Profile Year Ending June 2014. Tourism Victoria Research Unit – November 2014
20. Caravan and Camping Tourism Market Profile Year Ending June 2014. Tourism Victoria Research Unit – November 2014.
21. Healthy Parks Healthy People: the state of the evidence 2015. Prepared for Parks Victoria by Mardie Townsend, Claire Henderson-Wilson, Elyse Warner and Lauren Weiss, School of Health and Social Development, Deakin University, 2015.
22. Active Living Census 2014: Topline Report. City of Greater Bendigo, 2014

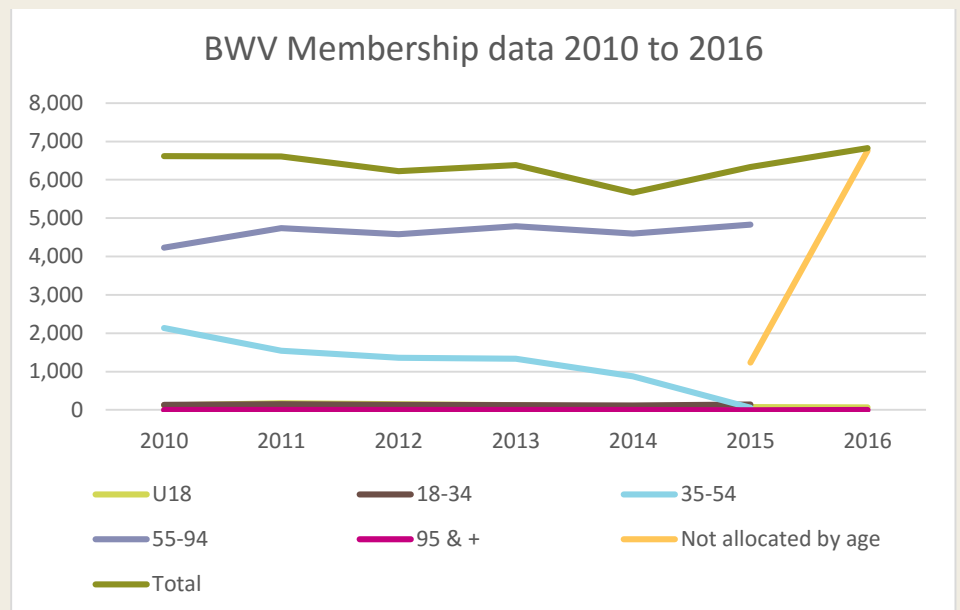
To access most of these reports, ctrl+click on the underlined words.

Appendix C: Summary of research findings

BWV membership

Bushwalking Victoria's Affiliate Club membership numbers have been flat or decreasing over the period 2010 to 2015.

- The demographic breakdown of club members in 2015 was:
 - 0.7% aged 35 to 54 (understated but still very low percentage)
 - 76+% aged 55 to 94;



- There appears to have been a steady drop in the number of members in the 35-54 age group from 2010 until 2014. In 2015 the numbers in this category dropped severely. However, in 2014 and 2015 some clubs did not provide a breakdown of their membership by age so it is not possible to be sure what the real figures are. During this time the Iranian Bushwalking Club joined Bushwalking Victoria and their membership is generally in the 18 to 54 age range so the 2015 figure will be an understatement. Despite these comments there was a clear trend of reducing numbers, most likely due to the long term retention of club members and their move into older age groupings. This may highlight a pipeline issue, and a future problem for memberships.
- Club membership as a proportion of Victoria's total population has decreased slightly from 0.12% in 2010 to 0.11% in 2015

YEAR	U16	17-18	18-34	35-54	55-94	95 & +	Total	Not allocated by age	Grand Total	No of Affiliated Clubs
2010	98	15	131	2,138	4,234	2	6618	0	6,618	65
2011	125	48	153	1540	4739	2	6607	0	6,607	64
2012	107	18	124	1336	4793	3	6381	0	6,381	63
2013	107	18	135	1364	4800	3	6427	0	6,427	64
2014	63	15	116	878	4597	1	5670	409	6079	62
2015	31	40	142	21	4952	0	5186	1136	6322	62
2016	67							6729	6829	62

Table C-1: BWV Club membership numbers 2010-2016

Bushwalking

The Australian Bureau of Statistics (ABS) conducted annual Exercise Recreation and Sport Surveys (ERASS) until 2010 when they ceased. The following are the key findings in relation to bushwalking from ERASS 2010:

- Walking had the highest participation rate in Australia with an estimated 6.3 million people aged 15 or older walking for exercise, recreation or sport at least once in the 12 months prior to the survey date.
- Bushwalking was ranked the 5th most popular activity with 4.8 % or 847,000 people bushwalking at least once in the previous 12 months.
- While walking, and bushwalking, were enjoyed by all age groups, the highest participation rate for bushwalking was in the 35+ age group.
- Analysis of additional information obtained from ABS indicates that Victorian 'bushwalkers' appear to fall into two groups:
 - 1% of those surveyed bushwalk for periods of half a day or longer. About 40,000 Victorians are estimated to belong to this group; and
 - 3.5% of those surveyed bushwalk for less than half a day. About 140,000 people are estimated to belong to this group.
- Demographic breakdown of Victorian bushwalkers in 2010 was:
 - 53% male and 47% female
 - 50% aged 35 to 54
 - 20% aged 55 to 64; and
 - 12.5% aged 65 and older

Local Example: City of Bendigo

Greater City of Bendigo Active Living Census 2014 Topline Report, published in December 2014 reported that:

- 80% of Census respondents walk at least once per week. Approx. twice as many female walk than males.

- 42% bushwalk at least once per week and another 40% bushwalk at least once every 2-3 months. Approx. 20% more females bushwalk than males.
- The highest participation occurs in the 35-49 and 50-69 age groups, with female participation highest in 35-49, and males higher in 50-69.
- The top barriers to participation are time poor (65%), personal issues (49%), cost (29%), lack of social support (24%), awareness (18%), safety (17%). Barriers were considerably higher for females (>2X) except for personal issues for males (62% versus 52%).
- 71% used tracks in home suburbs. 94% cited “health & recreation” as the reason for using tracks, versus “me time / back to nature” with 55%

Health

- 63% of Australian are overweight, an increase from 56.3% in 1995.¹
- In Victoria 2 million people are overweight or obese including 24% of children. In the Executive Summary of the Victorian Public Health and Wellbeing Plan 2015-19, the first listed priority area for action is ‘healthier eating and active living’. The Executive Summary also notes the requirement to focus on all ages of life when implementing programs.²
- VicHealth report identified that about two thirds of women are classified as being sedentary or with low physical activity levels.⁶
- Driven by public health awareness campaigns, the number of individuals engaging in a more active lifestyle is increasing.
- *Victoria’s nature-based outdoor economy report* found that each hour of walking in Victoria’s park reduced healthcare costs by \$4 or \$63 million p.a.³
- The ‘*Beyond Blue to Green*’ report reviewed a large number of studies and summarized the health benefits of exercising in natural areas. One of the key findings is that ‘Participating in health-promoting group activities such as hiking, physical activities and gardening also has a range of benefits for health and well-being’.⁴
- Research commissioned by Parks Victoria clearly sets out the physical, mental and spiritual benefits for people of all ages of using parks and other natural areas. It also identifies motivators and barriers to participation.¹⁰
- Surveys conducted by the Australian Bureau of Statistics found that a lower proportion of respondents who did not speak English participated in sport and recreational physical activity in the 12 months leading to the survey compared to respondents who can speak English very well (17.4% and 63% respectively). When participation rates are derived from both Country of birth and proficiency in spoken English, people born in non-English speaking countries had a lower participation rate (51.4%) than those born in Main English-speaking countries (70.7%).⁵

Sources:

1. ABS 4363.0.55.001 Australian Health Survey
2. *Victorian Public Health and Well Being Plan 2015-19*
3. *Victoria’s nature-based outdoor economy report: key estimates and recommendations*. Jan 2016

4. Beyond Blue. Beyond Blue to Green: The benefits of contact with nature for mental health and wellbeing (literature review). 2010
5. ABS Migrants and participation in sport and physical activity, 2006.
6. Female Participation in Sport and Physical Activity, 2014. VicHealth, August 2015.
7. Healthy Parks Healthy People: the state of the evidence 2015. Prepared for Parks Victoria by Mardie Townsend, Claire Henderson-Wilson, Elyse Warner and Lauren Weiss, School of Health and Social Development, Deakin University, 2015

Key Insights from this data:

- That there are substantial numbers of overweight and obese people needing support in order to become more active and therefore healthier;
- That women and CALD groups have lower participation rates than men in general and provide opportunities to raise their awareness of bushwalking as a suitable active recreation
- That there are substantial physical, mental and wellbeing health benefits to exercising in natural places.

Tourism and Parks

The figures in the table below summarise tourism activity levels and trends as they relate to parks and bushwalking by three tourism marketing segments or groups. These categories or profiles are part of a market segmentation approach used by Tourism Victoria when analysing tourism figures.

The three market segments definitions are:

- Nature-based: Nature-based visitors are defined as those who visited a national or state park, a wildlife park, zoo or aquarium, a botanic or public garden, and/or went bushwalking, whale or dolphin watching and/or participated in snorkelling and/or scuba diving while on their trip to Australia
- Adventure: Adventure tourism visitors are defined as those who experienced bushwalking or rainforest walks, fishing, scuba diving, snorkelling, surfing, sailing, windsurfing, kayaking and/or other outdoor activities while on their trip to Australia.
- Caravan/Camping: Caravan and camping tourism visitors are defined as those who stayed at least one night in a caravan park, commercial camping ground, caravan, or camped near a road or on private property while on their trip to Australia.

Key Insights from this data:

- Remarkably similar age distribution across all three profiles
- All three profiles show increasing use of parks and participation in bushwalking and that the rate of increase is itself increasing
- There is considerable potential to increase bushwalking participation in the Nature-based and Caravan/Camping profile groups
- Usage of our parks is increasing considerably – it will double in 7 years. Growth is at least partly driven by tourism (intrastate, interstate and overseas). Are our parks ready to cope with this? Is the park funding model sustainable?

Usage	Nature-based	Adventure 000's	Caravan / Camping
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	000's		000's
Domestic visitors	2,610	3,362	2,527
Change 2010 to 2014 (Domestic)	+9.4% (+12.2% - 2013/14)	+7.4% (+7.6% - 2013/14)	+4.2% (+7.9% - 2013/14)
International Visitors	1,434	706	153
Change 2010 to 2014 (International)	+8.6% (10.7% - 2013/14)	+5.1% (+7.4% - 2013/14)	+1.5% (+9.9% - 2013/14)
Go bushwalking (2014)	36%	74%	30%
Visit national and state parks (2014)	66%	N/A	25%
Ages			
• 15-24	11%	17%	14%
• 25-44	41%	39%	36%
• 45-64	33%	33%	35%
• 65+	14%	11%	15%

Table C-2: Three Tourism Victoria market segments and their use of National and State Parks.

Sources:

- Adventure Tourism Market Profile Year ending June 2014. Tourism Victoria
- Nature-based Tourism Market Profile Year ending June 2014. Tourism Victoria
- Caravan and Camping Tourism Market Profile Year ending June 2014. Tourism Victoria

The diagram below shows users of national parks divided into Parks Victoria user segments.

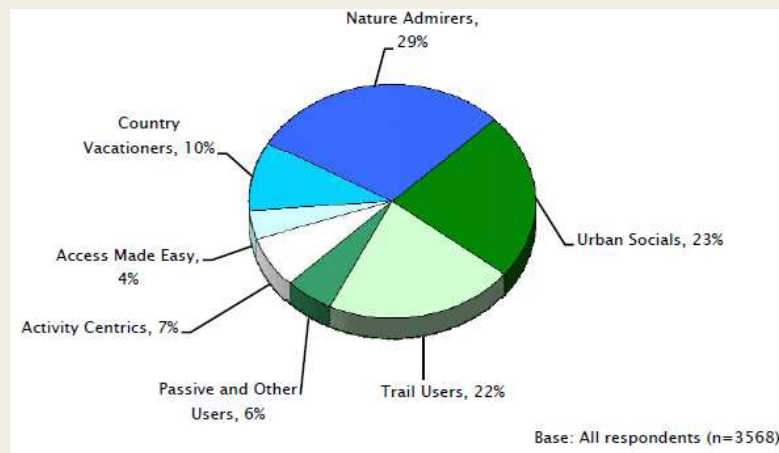


Diagram C-2 Usage of National Parks by Parks Victoria User Segments
 ‘Trail Users’ make up 22% of all park users and is further divided into sub-segments as shown below along with their proportion of the overall Trail Users group.



Diagram C-3 Usage of National Parks by ‘Trail Users’ (Parks Victoria User Segment).

Both diagrams above sourced from: Presentation: “Communicating with Trail Users”; Parks Victoria

Park Type	2003/04	2012/13	Percentage Change %
National and State Parks	24.9 million	34.8 million	+40%
Metropolitan Parks	14.1 million	16.4 million	+16%

Table C-3: Number of visits to Victorian parks

Source: Parks Visitation Monitor Quarter 1-4 – 2012/2013, July 2013.

Volunteers

In 2012, the *National Volunteering Strategy* identified the following trends:

- More people are volunteering but for less time than in the past. The number of adult volunteers almost doubled from 3.2 million in 1995 to 6.1 million in 2010. However, the median number of hours per volunteer has reduced by almost a quarter from 74 hours per year in 1995 to 56 hours per year in 2010.
- Growth in volunteering is uneven. Rates of volunteering have grown in sport, religion and education but have declined in community services and emergency management.
- More volunteers want roles that are flexible, or require shorter hours or a shorter term commitment.

- People are increasingly time poor and volunteering competes with greater work and caring responsibilities
- People are more mobile than in the past so volunteers are less likely to stay

	Victoria: number of persons who volunteered
15-19	54,022.0
20-24	58,311.0
25-29	52,896.0
30-34	52,694.0
35-39	68,097.0
40-44	83,519.0
45-49	80,243.0
50-54	69,888.0
55-59	60,451.0
60-64	60,372.0
65-69	50,019.0
70-74	36,966.0
75-79	23,927.0
80-84	14,352.0
85+	6,688.0
All persons	772,445.0

Diagram C-4: Victorian volunteering figures by age groups, 2011 census

Source: State of Volunteering in Australia 2012, Volunteering Australia, 2012

Key Insights from volunteering census figures:

- Confirms anecdotal evidence from clubs that retirees are reluctant to volunteer – many have worked all their lives and now wish to travel or relax and let others do the work.
- Decreasing number of volunteers in the 60 to 74 age groups may reflect that time is spent looking after grandchildren rather than on community activities.
- Highest numbers are in the 40-49 age groups – likely to be parents volunteering to support schools and recreational activities of their children
- the number of volunteers in the 15 to 34 age groups is higher than the 65-69 age group who might be expected to have more time for volunteering.

Appendix D: Victorian Bushwalkers: ERASS Findings 2010)

A2.1 Victorian Bushwalkers

The following information is based on ABS figures in Exercise Recreation and Sport Survey (ERASS 2010). Bushwalking Victoria was given access to some additional data relating to the Victorian figures that were not included in the published report.

A2.1.1 Bushwalking in the Top Ten

Bushwalking ranked in the top ten national activities in 2010

- Of all activities, walking had the highest total participation rate (35.9%). An estimated 6.3 million persons aged 15 years and over walked at least once for exercise, recreation or sport in the 12 months prior to interview (Figure 11 and Table 13).
- This excluded bushwalking, which is categorised separately and had a total participation rate of 4.8%.
- Other sports and physical activities with relatively high total participation rates were aerobics/fitness activities (23.5%), swimming (13.0%), cycling (11.9%) and running (10.6%).

Activity	Percentage (survey) %	Estimated total population	Comment
Walking	35.9	6.3 million	Bushwalking has ranked in the top 10 activities for every ERASS since they commenced in 2001
Aerobics/fitness	23.5	4.1 million	
Swimming	13.0	2.3 million	
Cycling	11.9	2.1 million	
Running	10.6	1.9 million	
Golf	6.7	1.2 million	
Tennis	6.0	1.1 million	
Bushwalking	4.8	847,000	
Football (outdoors)	4.8	844,000	
Netball	3.7	649,000	

Table D-1: National Top Ten Activities, 2010

Base: All persons aged 15 years and over (n=21,603)

A further breakdown of the figures for bushwalking and walking are provided below. In some cases, no breakdown was provided by State but the national figures have been included as it is likely that Victoria follows a similar pattern to that shown in the national figures.

'Bushwalking' is not defined in the survey but this group obviously consider themselves as bushwalkers or as participating in bushwalks and this is consistent with anecdotal evidence. 'Walking' is not defined either but would include walking in urban areas for exercise and walking to work/school/transport.

A2.1.2 Type of Bushwalking undertaken

The analysis of additional information obtained from the ABS in relation to ERASS 2010 indicates that 'bushwalkers' appear to fall into two groups.

Group 1

The analysis shows that in the order of 1% of the Victorian population say they bushwalk for periods of ½ day or longer and many of these people probably fit the profile of a typical bushwalking club member. For Victoria this represents 40,000 people. Bushwalking Victoria has about 9,000 members via affiliated and associated clubs and individual members.

Group 2

This group comprises some 3.5% of the Victorian population that say they bushwalk for periods of less than half a day. This is in the order of 140,000 people.

It is probably reasonable to assume that this group walks in parks or natural areas close to where they live because it would be unlikely that they would drive a long distance to walk for less than half a day in a national park. However, they may walk in such areas for less than half a day if they are staying in the vicinity for other reasons e.g. holidaying in the area.

A2.1.3 Bushwalker Demographics

In Victoria a bushwalker is slightly more likely to be male than female (53% / 47%) and very likely to be aged between 35 and 64. Half of all bushwalkers are aged between 35 and 54 but 20% are aged between 55 and 64 and a further 12.5% are 65 or older.

Table D-2: Gender (Numbers, 15 years and over)

Activity	Male		Female		Persons	
	No ('000)	%	No ('000)	%	No ('000)	%
Bushwalking						
Victoria	106.8	5	93.5	4.2	200.3	4.6
Australia	446.5	5.2	400.0	4.5	846.5	4.8
Walking						
Victoria	577.4	26.8	1023.9	46.1	1601.3	36.6
Australia	2268.9	26.2	4012.5	45.3	6281.4	35.9

Table D-3: Gender (Numbers, 15 years and over)

Activity	15 – 24	35 – 44	45 – 54	55 – 64	65+	Total
Bushwalking	39.9	196.4	229.4	169.3	105.4	846.5
Walking	318.6	1,111.2	1380.4	1268.9	1339.2	6281.4

Table D-4: Age Groups (Percentages)

Activity	15 – 24	35 – 44	45 – 54	55 – 64	65+	Total
Bushwalking	4.7	12.5	23.2	27.0	20.0	12.5
Walking	5.1	13.7	17.7	22.0	20.2	21.3

A2.1.4 Bushwalking Activities

Bushwalkers generally participate in non-organised activities (85%) and 62% walk 12 times or less per annum. 38% walk between 7 and 26 times pa while 11.8% walk more than 53 times pa.

Table D-5: Organised and Non-Organised Activities (Numbers)

Activities	Organised		Non Organised		Totals	
	No ('000)	%	No ('000)	%	No ('000)	%
Bushwalking						
• Victoria	29.2	14.6	200.3	100	171.1	85.4
• Australia	103.2	11.8	846.5 (should be 875.8)	100	772.6	88.2

Table D-6: Number of Times per annum ('000)

Activity	1 – 6	7 – 12	13 – 26	27 – 52	53 – 104	104+	Total
Bushwalking							
• No's	320.2	201.1	120.4	101.4	28.0	71.3	842.4
• %	38.0	23.9	14.3	12.0	3.3	8.5	100
Walking							
• No's	114.0	161.7	291.9	855.9	1124.7	3706.0	6254.3
• %	1.8	2.6	4.7	13.6	18.0	59.3	100

A2.1.5 Participation rates

For any group, the total participation rate is the number of persons who participated in the activity at least once in the last 12 months expressed as a percentage of the total population in the same group.

The highest participation rate of any Australian age group in bushwalking is 7.6% for those aged 45 -54, closely followed by those aged 55 to 64 (6.7%). Males have a higher participation rate than Females.

Table D-7: Gender (15 years and over)

Activity	Male %	Female %	Persons %
Bushwalking			
• Victoria	5	4.2	4.6
• Australia	5.2	4.5	4.8
Walking			
• Victoria	26.8	46.1	36.6
• Australia	26.2	45.3	35.9

Table D-8: Age groups (Australia)

Activity	15 – 24 %	25 – 34 %	35 – 44 %	45 – 54 %	55 – 64 %	65+ %	Total %
Bushwalking							
• Victoria	1.2	4.2	5.4	7.1	6.0	7.6	5.0
• Australia	1.3	3.5	6.3	7.6	6.7	3.8	4.8
Walking							
• Australia	10.6	35.6	35.6	45.6	50.5	47.8	35.9

Table D-9: Frequency (Times per annum) (Australia)

Activity	1 – 6 %	7 – 12 %	13 – 26 %	27 – 52 %	53 – 104 %	104+ %	Total %	Mean times	Median times
Bushwalking	1.8	1.1	0.7	0.6	0.2	0.4	4.8	34.7	11.7
Walking	0.7	0.9	1.7	4.9	6.4	21.2	35.7	180.3	155.9