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The Early Impacts of COVID-19 on QORF Members: Analysis of structured interview questions

Developed for QORF – The Queensland Outdoor Recreation Federation

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The Early Impacts of COVID-19 on QORF Members

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Disclaimer

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Executive Summary

This report was developed to examine the current impacts of COVID-19 on members of the Queensland Outdoor Recreation Federation (QORF). Recognised by the Queensland Government as the peak body for the outdoor sector and outdoor activities in Queensland, QORF is a member-based organisation that seeks to raise the profile, capacity and opportunities of outdoor activities in Queensland.

The following research addresses concerns about the scope, scale and nature of impacts of COVID-19 on those working in and for the outdoor sector. Based on answers to structured interview questions with 88 (54%) of QORF's members, the findings reveal:

- 80% of QORF members have lost business resulting in staff needing to be stood down, work reduced hours, work from home, or rely on JobKeeper;
- 18% have no work for their casual/ non-essential staff and have had to stand them all down;
- 68% have already experienced major impacts on their revenue, with State Recreation Organisations (SRO's), Activity & Tour Providers, and Campsite/ Conference Centres indicating the greatest impacts;
- nearly 70% of respondents have a strong level of certainty their organisation would be operating in 6 months-time; and
- only 60% rated a strong level of confidence they would still be operating in 12-months-time.

When asked to identify their top business-related concerns relating to COVID-19, the respondents' included doubts regarding the **internal capacity** of their organisations to deliver services in the future; as well as concerns relating to **external factors** they could not influence. The latter included the impacts of:

- access restrictions;
- physical distancing requirements;
- restrictions on school camps;
- the loss of government funding; and
- the short- and long-term influence on staff and community mental health.

While 73% of respondents indicated they and their staff were currently coping (e.g. 'we're okay') with the implications and changes brought about by COVID-19, one in four respondents (27%) were not. This latter group expressed stress relating to the uncertainty being experienced. For example, these stresses related to:

- the future of their business;
- the wellbeing of their staff;
- their concerns about the longevity of COVID-19 restrictions;
- the future likelihood of government funding;
- doubts surrounding client/ member capacity to pay and willingness to return.

The sector also commented it was using a range of different methods to cope. These included:

- implementing remote/ work from home arrangements (for those still employed);

- enhancing communications by using different online platforms and expanding regularity of communications with staff, members and volunteers;
- accessing JobKeeper (where organisations and staff were eligible);
- taking the time to look after personal wellbeing; and
- finding ways to reach out and help others.

Through their responses to a series of structured interview questions, the outdoor sector clearly expressed the vital and important role they play in people's health, wellbeing, education, resilience and lifestyle. The sector also, however, believes this value is often unseen or insufficiently acknowledged. When asked what they would like government to understand – 70% of respondents indicated a desire for government to recognise and value the outdoor sector's community, economic and health importance.

The findings demonstrate the outdoor sector has been impacted early by COVID-19 and that for some members, the impacts are amplified given they follow on from a summer season of bushfire. The findings also highlight that many staff in the outdoor sector are employed on a casual basis and while these individuals are often trained and experienced facilitators, educators, leaders and guides, their employment status or their employer's business model, has left staff ineligible to receive JobKeeper support. The implications of being able to keep, reinstate or support these key workers is a real concern for some as they consider the capacity of the sector to 'snapback' if they lose their trained workforce.

It is important to highlight the findings provided in this report are based on information received *before* the release of both National and State frameworks and roadmaps to recovery which were made public on May 8. As such, the answers each respondent provided are not informed by the timelines and proposed actions for a staged recovery. It may be these documents will alleviate some of the uncertainty the outdoor sector has felt. Equally however, they may have resulted in a fresh set of questions and challenges. Only further research and monitoring of individuals and organisations responses will tell that story.

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1.0 Focus and Background for the Report

It is now widely recognised and generally accepted that just being outdoors supports physical and psychological health. More expansively, physical activity that **takes place outdoors** enhances our personal health and mental wellbeing as well as making a strong contribution to the Queensland's economy and welfare[1] (e.g. Adept Economics, 2019; Cheesman & Jones, 2018). In recent years research has demonstrated that physical activity, play, time in nature and outdoor recreation can help build people's resilience and coping capabilities; and it has been found to have a restorative function for those who have suffered trauma (e.g. combat veterans – Caddick, Smith & Phoenix, 2014; youth and young adults - Mutz & Muller, 2016; natural disasters – Thorpe, 2013). In the current COVID-19 context[2], the potential value of outdoor recreation to assist people and communities with collective personal, social, and economic recoveries is great; but for this to be fully realised it will require:

a) opening and ensuring access to appropriately 'safe' spaces and places[3];
b) knowledgeable participants with the awareness and skill to safely undertake the activity; and
c) the survival of large and small organisations, clubs, providers, support services and retailers that enable diverse participation opportunities.

This report was commissioned by the Queensland Outdoor Recreation Federation (QORF) to seek information from its members on the impacts of the COVID-19 crisis for their businesses, services, and staff. In what was recognised as a rapidly changing and stressful environment, QORF realised the social, economic, cultural and personal adjustments occurring in the local and global landscape were potentially impacting many of its members and the wider outdoor sector. To explore these expectations, QORF sought primary data to inform their advocacy for the sector and to offer communal support across its membership base.

The following document reports on findings from structured interview questions presented to members of the Queensland Outdoor Recreation Federation via telephone or responded to via email. These interviews took place on weekdays between the 20th and 30th April 2020. It is relevant to note that during that time there had not yet been any National or State-based announcements (i.e. staged 'Roadmaps to Recovery' guidelines) to indicate or confirm timings or scale of relaxation of social distancing and isolation rules as these relate to outdoor recreation. The release of these documents may have led to some changes in respondents' perceptions, but further research would be required to confirm their impacts.

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[1] Economic welfare includes estimates of net avoided health care costs as well as higher productivity (Cheesman & Jones, 2018).

[2] E.g. individuals are self-isolating within household groups to enable physical distancing; parks (state & local) and outdoor playgrounds have experienced widespread closures; outdoor businesses, clubs and associations are unable to provide nature-based structured or semi-structured provision of activities; uncertainty regarding the timelines or stages of 'recovery' to reinstitute these opportunities

[3] In this instance 'safe' refers to addressing hygiene and physical distancing requirements that form part of the response to COVID-19.

To support and inform the analysis and implications of the findings, the following report provides an analysis of the data and also includes research into some current policy responses to the COVID-19 pandemic from domestic and international jurisdictions which have similar outdoor sectors to Queensland.

1.1 An Evolving Landscape in Australia

Since January 25, when Australia had its first confirmed case of novel coronavirus (Melbourne), much has changed for individuals, the workplace, business, recreation, lifestyle, health, and the economy. On March 11, a global pandemic was declared, and from that time there have been a series of responses and restrictions which have required everyone to reduce person to person and community transmission of the disease. The crisis has created devastating effects (e.g. Dibb, 2020; Gennaro et al., 2020), including on Australian society, its economy, mental health, and wellbeing (AIS, 2020). In practical terms the COVID-19 response has resulted in (for example) the cancellation of local, domestic and international travel, the closure of schools and national and state based borders, the prevention of gatherings of people of more than (variously) 2, 5, 10 or that contained in a household, the closure of all businesses not deemed essential, and questions about the duration, scale, scope and likelihood of any 'return to normal'. It can be proposed that each of these changes have potential, early and enduring impacts on the complex and disparate organisations that comprise the outdoor recreation sector.

On May 5 2020, the Australian Health Protection Principal Committee (AHPPC) released its statement on the resumption of sport and recreation activities[4]. This document recognised the value and importance of the resumption of sport and recreation both for the range of health, economic, social and cultural benefits these activities can provide, but also for the wellbeing returns in helping Australians emerge from the COVID-19 restrictions. It also notes that outdoor activities are considered at a lower risk setting than indoor activity.

On May 8 2020, the Australian Government released its 3-Step Framework for a COVIDSafe Australia and the Queensland Government released their Roadmap to easing Queensland's Restrictions – A step down approach to COVID-19. These documents illustrate *potential* timelines for the phased resumption of different types of indoor and outdoor sport and recreation and offer some parameters that can inform organisations, clubs and businesses who rely on, represent, or deliver outdoor activities. While each document is welcomed and offer updated guidance and insights, at the time of writing this report there remained limited clarity for much of the outdoor recreation sector[5] who rely on broad (and specific) community participation.

[4] It should be noted this document endorses the AIS Framework for Rebooting Sport in a COVID-19 Environment

[5] The outdoor sector in Queensland includes a range of modalities of delivery and disparate client/ participation markets. Most broadly the outdoor sector incorporates outdoor recreation, outdoor education, nature-based outdoor therapy and adventure/nature-based tourism and is delivered through a mix of business models including but not limited to: Not for Profit clubs and associations, community recreation providers, sole traders, camping and conference centres, outdoor education providers, schools, training providers, consultants, retailers, government and non-government land and water managers, tourism operators and equipment hirers.

1.2 Methods

QORF is funded as the peak body for outdoor recreation in Queensland by the Queensland State Government. Working in coordination with the Government, QORF has been engaged in a series of initiatives to inform and care for its members, and to assess the implications of the COVID-19 pandemic on the outdoor sector. To support this role, QORF determined direct questioning was needed with its membership base and coordinated with the Queensland Government Department of Housing and Public Works, Sport and Recreation (SRS) to develop ten structured interview questions to be delivered via telephone conversations.

In recognition of QORF's limited resources and multiple other commitments, SRS offered to execute the interviews and contributed two staff to undertake the phone calls. The calls predominantly took place between 9am and 4pm on weekdays over the period from Monday April 20 to Thursday April 30, 2020. Where call backs were required the interviewers adjusted the hours of the calls to accommodate people's availability, with some calls taking place at 8am or 5pm (for example). On average the phone calls took 20 minutes, though some completed interviews lasted as little as 7 minutes and others 30 minutes.

Where a member a) could not be reached after one or two attempts, b) did not have the time to commit or c) preferred an alternate communication channel, the interview questions were emailed. Email responses were accepted and included in the data set if they were received by May 8. Thirty-eight (38) of the respondents provided their comments via email.

Of QORF's 163 listed / paid members, sixty-nine (69) were telephoned but either were not contactable or did not respond to messages before May 8. An additional ninety-four (94) members were contacted. Of these, one (1) was no longer an active member and did not answer the questions, one (1) had a conflict of interest, one (1) member declined the interview after hearing the legal disclaimer relating to the use of the data and personal information, and three (3) were support agencies providing subsidiary services to the outdoor sector and did not believe the questions were relevant to them. This provided a completed **data set from 88** member groups.

The two interview staff followed a script developed by QORF and SRS to ensure consistency of language and framing of the questions; and to ensure respondents were able to provide informed consent on the use of the data (refer to Appendix One for call script). Additionally, the interviewers' Team Leader modelled the interview technique with the first respondent; and each were encouraged to familiarise themselves with the QORF website so they built a baseline understanding of the organisation and sector. The interview staff remained in regular contact throughout each day as they worked through the QORF member list to help them sustain consistency in how they recorded response data. The questions were read word for word but where required, questions were repeated with emphasis placed on specific words to help clarify the intention. No follow up questions were asked.

Responses were recorded verbatim with the interviewers typing these into an Excel spreadsheet. Answers were not read back to respondents to confirm correctness or to provide the opportunity for additional information.

The data collected was given to QORF as a spreadsheet of responses and this was forwarded for analysis to the writer of this report. On receipt of the spreadsheet the file was cleaned to remove or

modify data that was incorrect or incomplete[6] and each respondent was allocated a member category that reflected their primary role in the outdoor sector. These categories correspond with QORF's existing classifications including: Campsites / Conference Centres, Activity/ Tour Providers, Outdoor Training Providers, Incorporated NFP Organisation, Retailers / Suppliers, Government Agencies, Consultants/Ancillary Organisations, Schools / School Program Providers, and Individuals. An additional category was introduced called State Recreation Organisation (SRO) which aligns with State Government funding labels, accommodates several of QORF's Ordinary Members, and differentiates the state organisation from their clubs and associations.

The interviews provided a mix of qualitative and scaled responses. The qualitative data was coded and then analysed in a search for common themes and patterns; while the quantitative data was collated and analysed using descriptive statistics. These were then plotted into graphs to illustrate the spread of responses provided. Where relevant, responses were also compared across organisation categories to search for patterns, commonalities and anomalies in responses based on the work or role each member undertook.

2.0 Findings

2.1 An Overview of Respondents

There were 88 respondents who provided answers to some or all of the questions either via telephone conversation or email. These were comprised of:

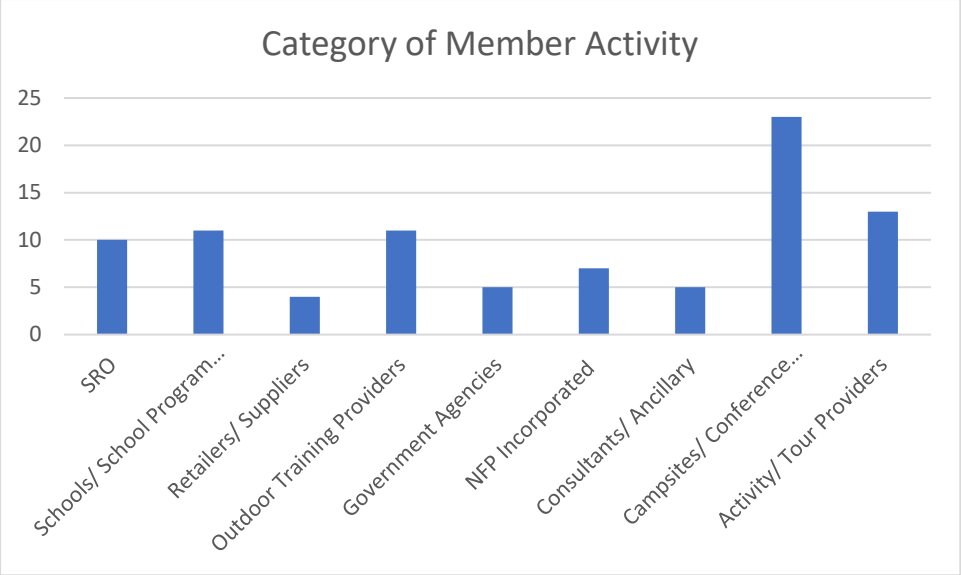
- **17 Ordinary** members (including state or national organisations, and collectives or associations which represent a significant portion of the industry in Queensland);
- **60 Associate** members (including outdoor centres, companies, registered businesses, schools, councils & other organisations which do not represent a significant proportion of the industry in Queensland);
- **5 Clubs/Group**s (including clubs, small groups and locally based Not-for-Profit organisations);
- **5 Individuals** (individuals or employees of member organisations)[7]; and
- **1 subsidiary** of an Ordinary member.

As illustrated in Figure 1, when the members were broken into single categories there was broad representation - though campsites and conference centres were the most represented (26%), followed by Activity / Tour providers (14.7%).

[6] Data cleaning is designed to maximise the data set accuracy, not necessarily delete information. It included fixing syntax errors, applying a new numerical indicator and assessing empty fields to see if responses were sufficiently complete to use.

[7] As defined by QORF's 5 levels of Green Circle Membership.

Figure 1: Category of Member Activity



2.2 Question 1: Briefly explain what your business does

There were commonalities in the descriptors respondents gave to explain what their business does, as well as evidence that some organisations would fit into multiple categories of business activity.

For example, some Activity / Tour Providers also provide a retail service as well as guide or training courses and safety inspections. Additionally, some Outdoor Training Providers also deliver client-based outdoor activities and group tours. Table 1 provides an indication of the key organisational activities identified by the respondents.

Table 1: Overview of Business Activity

Business Type	**Business Activity/ Clients**
Activity/ Tour Providers	Various target markets, services & outdoor activities. Activities: canoe and kayak education, bicycle and/or mountain bike tours, cave tours, camping, indoor and outdoor climbing, abseiling, adventure racing, walking tours, trail running and motorcycle/ dirt bike riding. Client markets included: • general public • newly arrived refugees • children • school groups, and • people facing complex and challenging life circumstances
Campsite and Conference Centres	Offer a combination of day, overnight and extended stay residential experiences.

	Core business is to run school camps with some also offering holiday programmes. The camp programmes are targeted to the delivery of, for example: • 'General Capabilities' as aligned to the Australian Curriculum • leadership and team building programs, and/or • outdoor recreation/ education activity Some centres also service community groups who make use of their facilities and/or facilitated programs.
Consultants	Provision of expert services relating to: • planning, design, management and/or maintenance of recreational trails • development of platforms to promote the use of outdoor, natural environments for recreational purposes (trails, beaches etc) • planning and management advice across the breadth of sport, parks, recreation and leisure services • design, construction, compliance of challenge ropes courses • organisational development and professional coaching.
Local Government Agencies	Provision of open space areas and sporting facilities for the community. Roles include policy, planning and enabling connections between communities and the parks reserves.
Incorporated NFP organisations	Services that support youth, community and/or regions to access, promote, include and/or advocate for outdoor recreation opportunities. This may include the delivery of programmes that include outdoor activities; for others it also involves planning for and supporting the development of trails and recreation spaces for outdoor recreation.
Clubs and small NFP's	• Provide recreational and, in some instances, competitive, experiences for their outdoor activity • Deliver coaching services • Maintenance of the environments they utilise and protect • Leadership development using an outdoor pursuit as the tool to support youth develop initiative, self-discipline and responsibility
Outdoor Training Providers	• Registered Training Organisations ○ Delivery of VET courses in Outdoor Recreation • Teach skills in outdoor activity(ies) • Support the training of volunteers through accessing accredited outdoor training and leadership development • Provide training, professional development and certification

Retailers/ Suppliers	• Supply outdoor equipment and clothing to outdoor education and recreation industry / general community • Some offer equipment hire
Schools/ School Programme Providers	• Residential outdoor education centres (Qld Government owned, Private School owned, NFP owned) • Program delivery for private / public schools • Delivery of outdoor education programmes (not centre based) • Run outreach education, and/or • Provide qualified staff for outdoor centres in SEQ.
State Recreation Organisations (SRO)	• Support and enable the provision of community-based outdoor activity • Advocacy for outdoor activity, its required spaces and its events • Liaise with government to set policy for outdoor activity • Development and promotion of outdoor activity • Issue licenses & permits. Organise insurance, safety, compliance

2.3 Question 2: The Effect of COVID-19 on Number of Paid / Volunteer Workers

Qualitative responses were provided to this question with **80% indicating they had lost business** resulting in staff needing to be stood down, work reduced hours, work from home, or rely on JobKeeper, where eligible.

Ten (10) respondents (11%) indicated they had experienced **no or minimal impact** on their staff / workforce. Three (3) of these were *Outdoor Training Providers*, one of whom explained they could continue delivering programs online and staff were able to work remotely from home. An additional 3 represented *Schools*. Some indicated they had been able reposition staff into other roles or undertake maintenance. Other school representatives clarified that while they held their full-time equivalent (FTE) staff, they recognise this may not be tenable for long as management continue to review the circumstances for the outdoor education department. The final group who indicated minimal or no impact were *SRO's* who rely on volunteers only – most of whom remain contactable and continue in their governance and administration roles.

In terms of **other effects**:

- 13.5% (12) have applied and achieved JobKeeper for their permanent staff;
- 2% (2) applied for JobKeeper but their staff do not meet requirements (e.g. casuals who do not meet the 60 days in the previous year requirement);
- 18% (16) have no work for their casual/ non-essential staff and have had to stand them all down resulting in no income for many;
- 14.5% (13) have stood down permanent staff (leave without pay);
- 13.5% (12) indicated they had introduced reduced work hours. These reductions ranged from 20% to 33% to 40% of normal work hours; and
- 7% (6) have required FTE staff to take pay cuts with three indicating this was set at 20%.

Volunteer only organisations indicated they have continued to pay (where relevant) the honorarium for their Governance workforce (e.g. Treasurer). Many are adapting to challenges of meeting online and delivering their programs remotely through online forums. Others have reduced all activity as their events and services can no longer be delivered.

While there were many similarities, the individual situations of respondents were also vastly different as reflects the diversity of the QORF membership, the multiple roles they play in the outdoor sector and their diverse business models. What is evident however, is that the impacts on staff had been deep and widespread:

> *"Total shutdown of both sporting & commercial sectors. Roughly estimated loss of 200 positions (FT, PT, Casual & Contractors). (Name withheld) is the only paid employee doing the administrative work. As there is no work currently, she is not billing anything for any time"* (SRO).

> *"Our casual instructors have had 5 major week-long programs cancelled on them so far. No pay for them. There are two full time teachers in the department. One has had hours reduced by 50% recently and the other one is being used now in another role in the school temporarily"* (School).

> *"I am a sole trader. We have a showroom where customers can come and try gear on and purchase items. We also sell online. We closed the showroom for the safety of the community and now only take orders online. I have been working 80% less hours as demand has decreased significantly"* (Retailer).

> *"We have 27 staff and little to no work for any of them"* (Outdoor Training Provider).

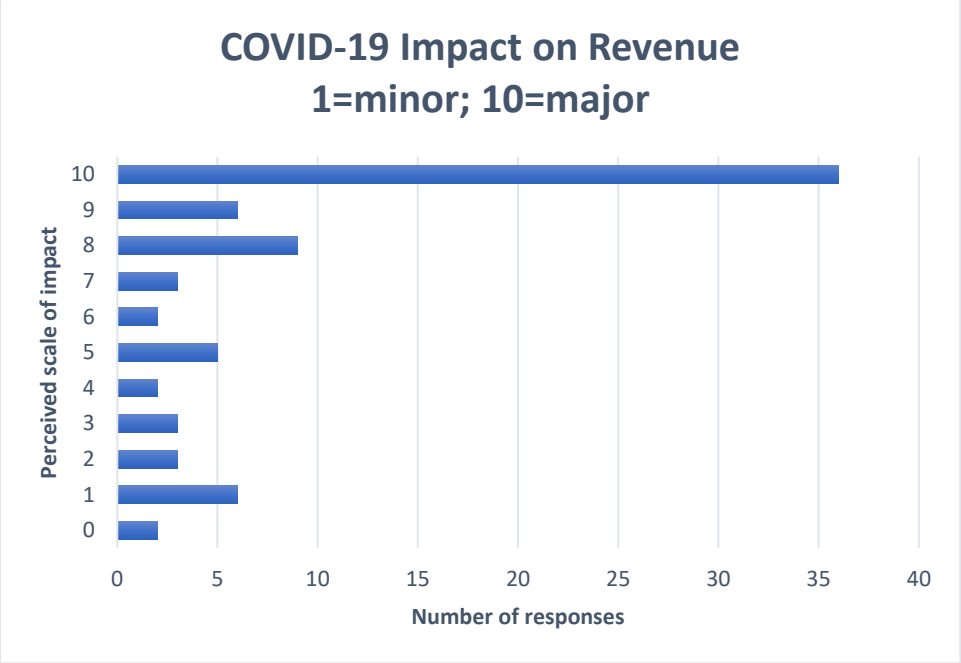
2.4 Question 3: What impact has there been on your revenue?

Respondents were asked to rate the impact of COVID-19 on their revenue. This was done on a scale of 1 to 10, where 1 indicated minor impact and 10 indicated major impact. Seventy-five of the respondents (85%) provided an answer.

While no other scale indicators were provided, 48% of respondents indicated their revenue impacts had been major (response of 10) and 68% rated the impact as at least 8 or more.

Only 16% of respondents found the impacts to be minor, rating their answers as 1, 2 or 3; and two (2) respondents indicated a response of 0. As some respondents offered qualifying statements it is evident these latter respondents represented schools who either adjusted their curriculum to delay outdoor recreation / education experiences or had moved their outdoor education programs to Term 4. As such no financial impacts had yet to be realised.

Figure 2: COVID-19 Impact on Revenue



Those who indicated the *least current financial impact* were:

- school teachers who were not aware of financial repercussions;
- retailers who had online shops;
- online training providers; or
- not for profit organisations who are more reliant on membership fees which are not due until later in the year.

Those *greatest affected* were:

- State Recreation Organisations (SRO's) that could not run events or collect membership fees at the beginning of the year;
- Activity/ Tour Providers who have no capacity to provide their core services; and
- Campsites / Conference Centres who have lost all revenue from April to June and predict even greater losses in the first quarter of the new financial year.

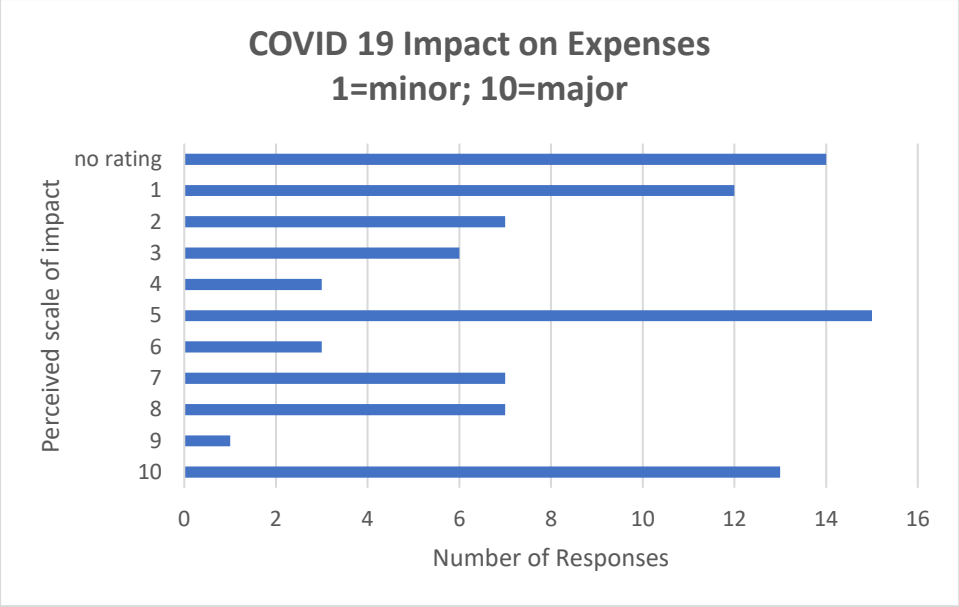
2.5 Question 4: What impact has there been on your expenses?

Not all respondents were able to answer this question, however as illustrated in Figure 3, the most common responses to the impact of COVID-19 on expenses of QORF members were:

- 17% indicated a rating of 5 (this may be assumed as some impact);
- 16% rated this as 9 or 10 (major impact);
- 16% gave no rating (e.g. not applicable, don't know, yet to be seen); and
- 14% gave a rating of 1 (minor impact).

These findings indicate that just over 41% of respondents have experienced more than some to major impacts (rating of 6 or more) on their expenses, while 57.5% have experienced minor to some impacts.

Figure 3: COVID-19 Impact on Expenses



The reasons for these perceptions differ and may represent a combination of different ways of interpreting the question, a lack of knowledge to inform the ability to answer the question, and/or a cautious approach that acknowledges some expenses have reduced as revenue opportunities disappear.

Table 2: Scale and reasons for Expense rating

Type of Impact	**Rationale for rating**	**Organisation Type/s**
Minor Impact *(1-3)*	• Not many expenses. Volunteers only • QG has waived fees on Commercial Activity Permits • Reduced travel expenses, continuing BAU online • Wages covered by JobKeeper • Receiving rent relief • Costs decreased for programs, but fixed costs remain the same • Higher level expenses remain the same. Little proportional reduction in expenses	NFPs SROs OD Training Providers, Consultants Campsites, Government Agency
Moderate Impact *(4-7)*	• No extra expenses – just the basics • Able to defer some expenses, no income but also no large overheads • Planned capital expenditure pushed back 12 months or more • Doing maintenance only	Campsites, Activity / Tour Providers, Incorporated NFPs

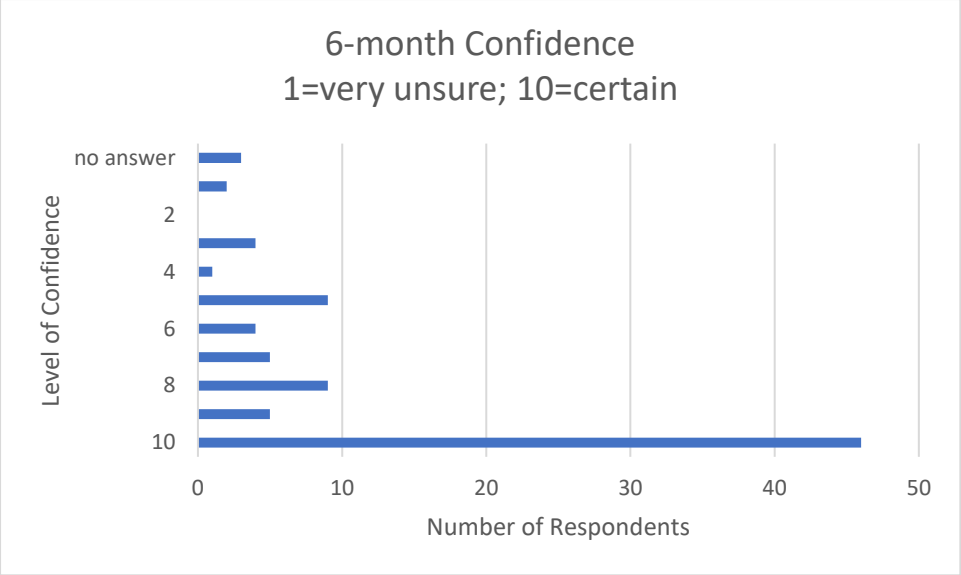
	• Big loans deferred • Expenses continue, revenue does not • Staff work from home, cost saving • Changed workloads & roles – just shifted costs around • Expenses reduced in line with lack of activity • Still have bills, stock pre-ordered still has be committed to. Cash flow significantly affected (7)	Outdoor Training Providers Government Agency SROs Retailers
Major Impact *(8-10)*	• 'Repositioning of our business initiatives has been a major expense' • Rent • Debt • Wages / staff costs • Insurance, public liability, personal accident for members still in force – major expense • Little or no income with usual fixed costs (water, electricity, maintenance, staff)	Activity / Tour Providers, Outdoor Training Providers, SRO's, Campsites / Venues
Nil or Unknown Impact *0 or nil answer*	• Shifted school programs to T4 2020 • 'Only pay myself for jobs that are done' • Unknown though incurring expenses for signage (re social distancing) • Will not know till later once amendments to fees are calculated	School Consultant Government Agency Outdoor Training Provider

2.6 Question 5: Confidence the organisation will be operating in 6 months-time?

As illustrated in Figure 4, more than **52%** of respondents indicated they were **certain** (rating of 10) their organisation would be operating in 6 months-time; and nearly 70% indicated a level of certainty rated at least 8.

Just under 8% rated their confidence as less than 5 (mid-range) and 3% were unable or unwilling to answer.

Figure 4: Confidence organisation will be operating in 6 months



A few respondents offered some comment on the rationale of their response. The most certain indicated:

- As employees of schools they were confident their organisations would continue.
- Some SRO's have sufficient accumulated funds to buffer the financial impacts, although others confidence came from anticipating possible government assistance.
- NFPs rely on their volunteers and are confident they can find more in their communities.
- A consultant acknowledged they were still in start-up mode, so had not fully committed to paying wages yet.

Those who took a less confident but still hopeful approach were confident as long as their eligible staff were receiving JobKeeper. They were however less confident a) anticipating when JobKeeper ceased and b) while the education sector was not approving excursions or camps. Others had ongoing projects with government clients but remained concerned about the duration of how long people could not travel.

Yet others hoped their organisations would exist, but this depended on:

- health advice, physical distancing requirements and the opening of outdoor areas; and
- participants willingness to come back to the activity.

Finally, those experiencing the greatest uncertainty (ratings 1-3) expressed doubt about:

- the availability of future projects relating to outdoor recreation planning, design, maintenance etc;
- the timelines and restrictions that might be placed on accessing outdoor spaces in groups for both domestic and international visitors; and
- customers capacity to pay.

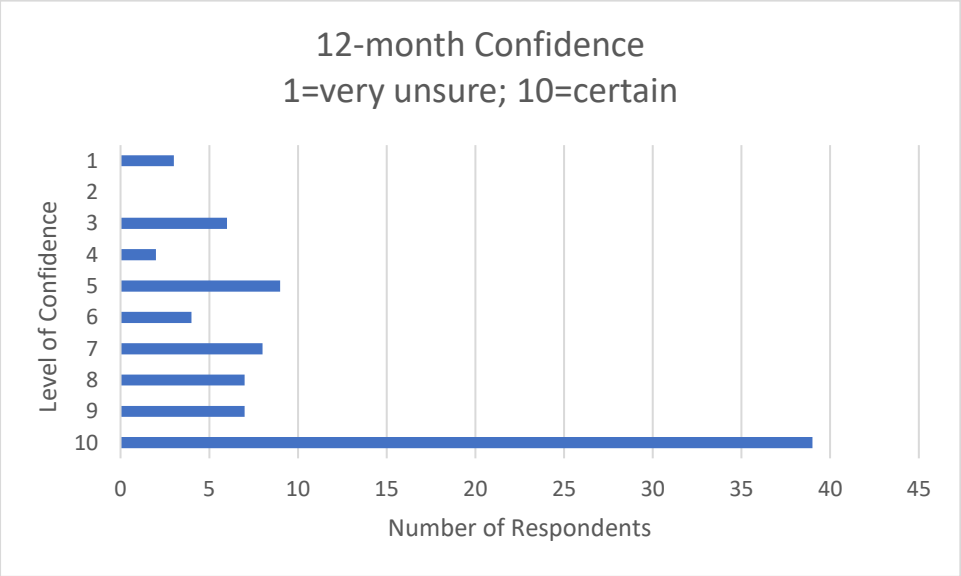
2.7 Question 6: Confidence the organisation will be operating in 12 months-time?

Three people did not respond to this question. Of the remainder, **44**% indicated they were **certain** (rating of 10) they would be operating in 12 months-time. This represents a drop in confidence of 8%.

Further, 60% rated a positive level of confidence of at least 8. This represents of drop in confidence levels of 10%.

Not only were **more people less certain** of operating in 12 months-time, but the number of people whose confidence was rated at less than 5 also increased, with 12.5% indicating an answer from 1-4. This represents an increase of just under 5%.

Figure 5: Confidence organisation will be operating in 12 months



A handful of comments explaining the respondents' perspectives were provided and included:

- concerns relating to the levels of restrictions that would be placed on (potential) customers (e.g. Retailers, NFPs);
- the duration of parameters placed on schools that restrict group-based travel and camps (e.g. Schools, Campsites / Centres);
- school management's willingness to continue to value the outdoor education experience as core to student learning (e.g. School); and
- potential loss of membership due to lack of participation opportunities (SRO).

2.8 Question 7: Top Three Major Concerns relating to COVID-19 right now?

The responses to this question were wide ranging but several common themes were identified reflecting shared concerns relating to the environment, people and economic considerations.

These apprehensions demonstrated respondents' doubts regarding internal capacity of their organisations to deliver services in the future; as well as questions relating to external factors they could not influence such access restrictions, physical distancing requirements, government funding, and staff and community mental health.

Sub-themes relating to 'People'[8]

The theme of people includes concerns relating to both clients and staff. Respondents questioned people's willingness to return to an activity as clients, staff or volunteers; they raised concerns regarding individual and community mental health; and they noted the potential of wide-ranging community, school and parental fears that may prevent participation in outdoor activities.

Table 3: Major concerns relating to COVID-19: People

'People' Sub-themes	**Descriptor**	**Example Comments**
Loss of good staff	Being able to retain, support & attract qualified, experienced staff (paid & volunteer) post pandemic.	• *Losing quality & reliable staff/instructors* • *Staff retention in the casual pool because they will be looking for employment across the board. We rely on casuals* • *I wonder if there will be staff to come back onboard once this is over* • *Will need to start from scratch with new staff if we do not reopen soon. Will need to deliver training up to one year or more* • *Keeping the commitment of volunteers going as they are vital to success* • *How will we maintain a skilled team?* • *The biggest impact is on staff. I managed to redistribute one, but others have to line up at Centrelink. It's devastating. When Qld Health release restrictions my staff may be unwilling to come back & I have lost 3 years worth of upskilling & training them. Qualifications lapse & logbook experience hours will cease, meaning these people will not be able to return qualified to hit the ground running when things ramp up again*
Mental Health & Wellbeing	Concerns about the impacts of COVID-19 on staff, client and community mental health.	• *Mental anguish needs to be looked at. Outdoor recreation needs to be increased as [it is] beneficial to mental health and well-being* • *What will be the future fallout from the pandemic – rise in mental health issues, decreased opportunities for social interaction? We represent essential services providing opportunities both now & in the future for people to maintain physical & psychological wellbeing. Will this be defunded?*

[8] Sub-themes mirror the language of the respondents.

		• *Impact on mental health with isolation & [subsequent] economic consequences for small business* • *We're concerned if major parks are closed down & people have to stay home completely. We have made a point to keep our open spaces available for these purposes due to mental & physical needs of the community (Government Agency)* • *Wellbeing of:* ○ *staff, clients, committee, ourselves*
Fears	The social & institutional fears that have been triggered & will impact on participation.	• *Public fear may lead to some stopping of outdoor activities/ tourism* • *The biggest thing is the uncertainty* • *Anxiety in students & parents about being away from home will increase* • *Even if restrictions are lifted early, schools would unrealistically consider that OE programs are still a risk* • *Risk of infections for employees & customers* • *The need to reassure people that the campsite is safe to return to*
Willingness to return	This strongly relates to mental health and fears (as well as economy) but also highlights the influence of lack of interaction & ability to engage with clients/ members.	• *If we can't interact with people then they may forget about us* • *No client interaction* • *The impact of the length of time that kids groups will be away from being active* • *How quickly people will come back to using a business like this?* • *When will restrictions on schools returning to school camps be lifted?* • *Will there be a stable market?* • *School camps & recreational tourism may not resume straight away due to lack of funds and/or trust* • *Regulations that prevent outdoor education. These are obviously necessary, but crippling.* • *COVID is changing us socially & it will take people time to regain their confidence*

Sub-themes relating to 'Environment'

'Environment' considerations refer to the range of implications relating to outdoor organisations' ability to access the spaces required to undertake their work; and the timelines around the easing of restrictions. Additionally, sub-themes of safety, the potential of a second wave of the pandemic, and the capacity of the outdoor industry to have sufficient influence to raise both sector concerns and profile the sector is worrying for some.

Table 4: Major concerns relating to COVID-19: Environment

'Environment' Sub-themes	**Descriptor**	**Example Comments**
Access restrictions	Concerns about limited & uncertain access to spaces & clients	• *Wanting to contribute to student's education but having limited access* • *Maintaining access to public …& trails for both mental and physical health of the community* • *Being able to mobilise trailcare & prevent them from deteriorating too much during this time of heavy use but minimal opportunity to conduct maintenance* • *Ability for members to be able to ride. There is a lot of uncertainty how far we are allowed to drive to use the tracks* • *Unable to undertake voyages due to social distancing requirements*
Uncertain timelines	The doubts and unknowns of when activities, spaces and restrictions will change and/or end.	• *The unknown of how long till kids return to school camp* • *When will it end?* • *How quickly will things open up?* • *The unknown timings of easing restrictions. Then when we can return to operations, how quick will that be?* • *It's the uncertainty of when will everything go back to being normal? When are restrictions lifted? Not just restrictions re social distancing, but more e.g. schools returning to school camps?* • *When can we start running events again?*
The threat of a 2nd wave	The impacts & threat of a revival of COVID-19.	• *Keeping the virus under control* • *Easing restrictions too soon resulting in a 2nd wave of cases* • *The ability for it to be completely eradicated i.e. that there is no 'second coming' of COVID-19*

		• *Keeping practices safe so we are safe and there is no second wave*
Sector Survival	The capacity of the outdoor sector to survive, to be a priority & articulate its benefits.	• *Will we be viable in a social distancing world? (e.g. camps are close quarters, activities are team based, schools travel here in buses)* • *Will the outdoor industry be a strong voice?* • *There will be impact on the whole industry* • *School camps are not very high on school budgets so will we be the first thing to go?* • *I'm concerned people will close their doors – private operators will sell businesses & close* • *This will impact on all recreational industries and the way people behave in the environment*

Sub-themes relating to 'Economy'

As illustrated in Table 5 the economic impacts of the pandemic on cashflow and income were consistently noted, as was a concern about the capacity of the market to pay for services. Additionally. concerns were raised about the availability of government funding for existing as well as future outdoor recreation related programs.

Table 5: Major concerns relating to COVID-19: Economy

'Economy' Sub-themes	**Descriptor**	**Example Comments**
Lack of Income	Including an inability to earn income.	• *We have zero income, with staff still needing to be paid. We aren't eligible for JobKeeper* • *We have lost a lot of contracts and opportunities that impact on our income because without physical contact we can't run our programs* • *Our lack of ability to adapt to attract new revenue* • *We lose members, we lose youth, we lose volunteers … we will be in a financially worse position* • *We have just come out of a drought/ bush fire combination so have been closed for three months before. These sucked our cash reserves so the crisis on top of this has made it very tricky*
Capacity to pay	Will there be a market inability or unwillingness to pay for	• *People's disposable income. Our industry relies on people wanting to spend extra money to go abseiling etc. Could be 18 months before people get disposable income back*

	outdoor recreation/ education/ tourism?	• *People won't have any money to re-engage with us later on (clients, government agencies)* • *The reduction of finances of some of my regular clients which might prevent them from returning* • *There will be a lack of confidence in spending money*
Funding	Includes concern about lack of public funding for outdoor recreation related activities, and questions regarding the availability of funding support for the sector.	• *Will there be impact in the delivery of state & federal funded programs (as money is reprioritised?)* • *Government funds for projects will dry up and no new projects will be funded including those we have already tendered for* • *Councils reverting to 'safe' actions, not spending on new ideas* • *Is this going to dry up government funding? Everything will be scaled back due to recovering from COVID-19? As a community group will we be last on the list before people are ready to come back to us as an activity?*

Overall, the respondents were clearly concerned about the **impact of COVID-19 on people**, especially their staff, as well as their clients and the broader community. They also expressed concerns about the **business uncertainty** resulting from the pandemic including the duration of restrictions and the flow on impact on their **capacity to plan**. As one respondent noted they do *"not know how our business will be required to run under any new restrictions".* Others confirmed they "*did not know what to plan for",* but some realised they needed to action preparations now, and try to accommodate to the uncertainty. For example,

> *"Ensuring we have the correct, scaled, timed return to work, which aligns with business income/ revenue with expenditure".*

Uncertainty lies at the heart of many of the concerns expressed. As one person said,

> *The hardest thing of all is the 'unknown'. i.e. when can we restart, what will that restart look like, and will we thrive or starve during the restart?*

2.9 Question 8: How are you and your staff coping?

Seventy-four (84%) of the respondents offered a comment on this question. Of these, **73% indicated that on some levels they were 'okay'**. For example, some commented they were, *"valuing the forcible slow down. Get to have a breather and think and re-evaluate to do things differently"* (Individual).

Others acknowledged *"it's been a mix of up and down"* (Government Agency) or that while they are *"okay at the moment"* they *"feel stressed about the future"* (Activity / Tour Provider).

There was a hopeful politeness in responses from many who indicated they were okay. As they explained:

> *"coping well. All in it together"* (Campsite / Conference Centre);
>
> *"coping well. Keeping in touch"* (Outdoor Training Provider;,
>
> *"all going pretty well … we all still have our jobs so we are among the lucky ones"* (Campsite / Conference Centre);
>
> *"we are very lucky in that we have other work which hasn't been affected, so staff are coping well"* (Consultants / Ancillary Organisation);
>
> *"we are working on what we can, when we can. Thanks"* (Government Agency).

Twenty-seven per cent (**27%**) acknowledged that COVID-19 is **stressful,** and they struggled to cope. While some identified reactions varied across staff (e.g. FTE staff still had work where casuals were stood down), others recognised they were "*very worried*" (NFP / Club) and/or did not understand *("we live in an isolated area and it is difficult to comprehend … [having] no job is very difficult and no wages"* – Campsite / Conference Centre).

Uncertainty about resources (e.g. "*what facilities will be open in the future"* – Outdoor Training Provider) and work were notable stressors. For example, an Outdoor Training Provider commented, It is an *"extremely worrying time for everyone [owners, senior management & staff) as this is an unprecedented situation. We can't rely on experience to answer questions from staff regarding the future operations"*. Some explained that staff "*are all feeling the crunch*" (Campsite/ Conference Centre) while others noted the situation was *"very stressful. Staff are not sleeping and we are worried about staff being put off"* (Activity / Tour Provider).

Ways of Coping

Coping mechanisms were also identified by some respondents. These included:

10% indicated they were using **remote work practices** such as,

> *"we are trying to keep busy. We're working from home via skype";*
>
> *"we have adapted to social distancing and work from home. We have implemented weekly catchups with all staff and are working to stay connected";*
>
> *"where possible staff are working from home and field staff are separated into groups of 2. Disinfectants are widely available and social distancing is practised as much as possible".*

10% commented on the value of **enhanced communications** to sustain connections:

> *"we have tried to retain connectivity with all staff even if it is just an email … Our level of comms has been quite strong and everyone is handling well";*
>
> *"we are dramatically increasing comms and volunteering comms of the membership which is strengthening the members … We bought [a] Zoom subscription – members getting together*

for technical and social drinks, creating online learning platforms. Builds strength of the organisation which is great. Have to keep the engagement alive via commitment";

"we are staying in regular contact and sharing 'shutdown' games, healthy (mostly) recipes, exercise challenges, video making and any other fun stuff we can do".

9% of respondents (who represented organisations able to keep staff), commented on the value of **adapting** and undertaking **planning, updating resources or doing maintenance** as a form of coping:

"we've been writing an event manual we have not been able to finalise but now have the time to do this. Great planning opportunities";

"whilst we have no programs it has given the staff an opportunity to organise projects and review standard operating procedures and risk management and things they haven't had time to do";

"been working on the business … and doing renovations at home";

"it's been a welcome break to pursue other avenues in the business we haven't had time for previously (in the online arena)";

"we are trying to develop and cost new models of camping that will be social distancing friendly".

6% of the respondents specifically highlighted **focusing on personal wellbeing** as a coping mechanism. For example,

"while there is an awful lot of people out of work, {staff] focusing on their own wellbeing and regenerating is helping";

"structured days, with a focus on wellbeing, maintenance and professional development";

"staff live on site so they will keep their homes and can walk in forest. That access is great for individual's wellbeing".

6% of respondents indicated that **JobKeeper** was a key coping strategy and if people are eligible, it can reduce stress:

"the JobKeeper program may give us something (still waiting to find out if eligible) and that has been the biggest challenge for staff";

"fortunately, my casual staff are receiving JobKeeper from their more regular employers. That's good for them, but a detriment for us".

Finally, a handful of respondents commented they were coping by **finding ways to help others**. For one this allowed them the opportunity to do meaningful *work "in helping the local schools"*. For others it involved *"providing assistance to participants we have had in the past",* or *"contributing into the community – because we have the time".*

2.10 Question 9: Top Three Things Government should understand about the Outdoor Recreation sector?

Number One 'Thing'

Most respondents (70%) wanted Government to understand the **importance of the sector** and the contributions that it makes to community, individuals, health, the care of the environment, to wellbeing and the economy.

Multiple comments emphasised the lifestyle, health and wellness contributions offered by the diversity of outdoor providers (category), intentions (recreation, education, therapy, tourism), activities, spaces and places. For example:

> *"outdoor activities are great for mental health and wellbeing of individuals. Outdoor activities and sport are a necessity for general health and that is the number one combatant of fixing all health-related diseases and sickness"* (Government Agency; Campsite);
>
> *"health and wellbeing are very important and (the outdoor sector) will be more essential when doors get open again … to help reduce depression"* (Tour/Activity Provider), *"help people recover from isolation"* (Consultant / Ancillary Organisation), *"to be more connected and resilient"* (Campsite / Conference Centre);
>
> *"being active in the outdoors is proven to be healthy for all aspects of people's lives – social, mental, emotional, physical, developmentally for children and should be encouraged at all times"* (SRO);
>
> *"outdoor rec is therapeutic. It is set up so that no one fails and [everyone] gets a sense of accomplishment. Social media is disconnecting people in society. Outdoor rec - no phone reception and can see physical change in children's attitudes - a detox. It's lifestyle medicine – it lifts people's mood just looking at nature. Being active is fully important for people"* (Outdoor Training Provider).

Number Two 'Thing'

Extending on these ideas some respondents highlighted that the sector would greatly **benefit from support and recognition** to be able to respond and to help the Queensland community thrive. With a mix of volunteer led, not for profit, and private enterprises, there were requests for:

> *"more funding and support for business to engage in strategic and organisational development"* (Consultant/ Ancillary Organisation);
>
> *"support to help make business smarter – time for innovation"* (Individual);
>
> inclusion. *"As a small not for profit we have fallen through the cracks of gov support – but it's vital we survive because we underpin the quality of experience delivery in tourism … There are many organisations like ours such as QORF & Eco Tourism Aust which are the glue that hold the industry together and setting benchmarks offering value for money. It's critical that we survive" (Incorporated NFP).*

The need for recognition as a preface to support was raised by others who also saw that the outdoor sector *"sits between the tourism industry (Eco and Adventure), hospitality and the education sectors.*

So whatever decision the Government makes in order to support each of those sub-sectors, they really need to look into the singularities of OE sector and adapt all new policies so they support the outdoors sector" (School/ School Program Provider).

Others indicated the need for support but recognised this required government first having a greater understanding and recognition of the sector. For example, they would *"like them to have a full understanding of the financial value of the sector as a whole so they know what it means to their economy. {This] motivates them appropriately"* (Activity / Tour Provider).

Another acknowledged that *"much of outdoor recreation is unstructured and occurs outside existing sport and recreation bodies so it is difficult to quantify participation"* yet this did not preclude the importance or value of *"providing adequate funding and resourcing agencies that manage recreational areas such as state forests and national parks"* (SRO) or from *"being recognised for mainstream government funding"*. As another pointed out, *"there is high expectations put on volunteers to get outdoor rec to work … but it is not recognised as much by the government as club sport … it needs more funding support to recognise us and get projects done ... and sensible policy. Where do we get matching funding from? We can't charge people to come onto the grounds like clubs can. We don't have a true earning potential"* (SRO).

It is relevant to also acknowledge that for some, the support desired extended to very specific funding needs as respondents highlighted the benefit of receiving funding to:

- support staff (e.g. NFP, SRO, Activity/ Tour Provider, Outdoor Training Provider, Campsite / Conference Centre);
- develop and deliver COVID Safe programmes (e.g. Campsite / Conference Centre, Clubs, SRO's, Activity /Tour Providers, Outdoor Training Providers, School / School Program Providers);
- help bring facilities back online once the pandemic crisis had abated (e.g. Campsite / Conference Centre, School / School Program Provider, NFP Incorporated, Activity / Tour Provider); and/or
- be able to meet ongoing costs with zero income (e.g. NFP Incorporated, Activity / Tour Provider, Campsite / Conference Centre, Clubs).

Number Three 'Thing'

There were also concerns that **government restrictions and policy**, a lack of understanding or an emphasis on sport and sport models, can **intervene in the capacity of the sector** to do what it does well.

For example, some commented that the financial viability of their *"campsites and activity centres is hindered by restrictions placed on government leases"* and that there was a need to provide *"additional support for community groups supporting all outdoor recreation not just sport"* (Consultant / Ancillary Organisation).

Others pointed out a need for government to remember that *"planning is just as important as construction"* and that the social good from outdoor recreation is not something that can or will be funded by the private sector (Consultant). Some wanted to remind government that the outdoor sector required intentional land and water management that worked with the sector, not in

competition with it. For example, there is value in *"focusing on aboriginal land management techniques for bushfires"* and *"engaging in more consultation with traditional owners"* (School/ School Program Provider). There is also ongoing need to respond to the *"large number of people using trails, but the councils and state government are not managing trails enough. There are not enough resources"* allocated (School / School Program Provider).

With COVID-19 restrictions in place respondents needed government to understand that the sector *"is one of the first industries to be hit and will probably be the last to recover"* (Activity / Tour Provider). Specifically, the restrictions *"are having a massive impact on the sector. Many small operators like myself rely heavily on places to be open for clients and customers to be able to use. The sooner parks and borders, flights resume and restrictions are lifted, the better chances that small businesses will be around in 12 months"* (Outdoor Training Provider).

Number Four 'Thing'

A cohort of respondents wanted government to understand that the **workforce** of the outdoor sector is **highly casualised**. As such the capacity for staff to access income support through JobKeeper is restricted impacting the potential pool of quality and skilled staff in the future.

Other 'Things'

With no qualifiers on how people could respond there was great variance in the realm of responses that people gave. While not all responses were mentioned by numerous people there remained additional comments that were vigorously mentioned. For example:

- There was passion around the need for government to understand that natural outdoor environments, the opportunity for people to be active outdoors, and participation in **outdoor recreation**, tourism, therapy and education, "***is NECESSARY****. It is more than a recreational OPTION"* (Campsite / Conference Centre).
- There will be a need for **consistent and clear communication** so organisations can prepare to recover (e.g. "*we need direction on how the transition will occur… when we emerge there will be some health related protocols … These need to be clarified*" (e.g. Activity / Tour Provider).
- The **sector is diverse.** Individual businesses and sector categories will take **different amounts of time to recover** and will face **different challenges**. "*There are potentially certain areas that might come back pretty quickly. But when restrictions are lifted on parks, lakes etc we will be inundated with people and will have potentially different sets of issues that will arise. Other areas like outdoor education will suffer and not kick off as fast … We do not want outdoor ed to fall away"* (Activity / Tour Providers).

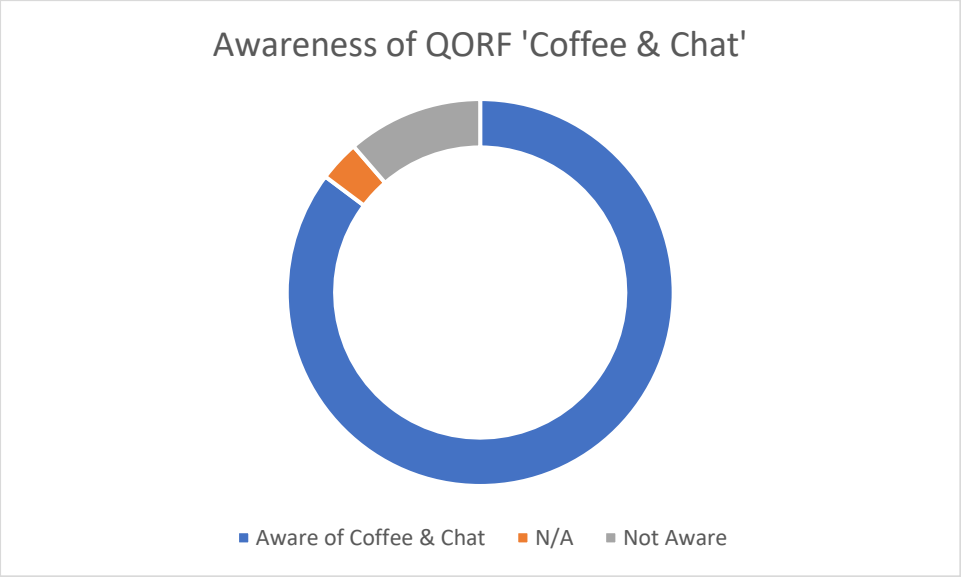
Essentially, the request from respondents is for government to actively **value the outdoor sector**, its workforce, spaces, and programmes. The desire was that all aspects of the outdoor sector be accounted for and given support to make their contributions to their communities and clients.

2.11 Question 10: QORF 'Coffee & Conversation': How often should these chats be hosted?

While this question (Appendix One) related to the frequency of the online Coffee and Conversation sessions QORF are holding, the respondents' answers reflect a comment on their awareness and valuing of these outreach sessions. The following results reflect the variety of answers provided.

As seen in Figure 6, **85%** of members were **aware** of these sessions, with **11% unaware**. Three percent (**3%**) suggested the question was not relevant to them.

Figure 6: Member Awareness of QORF Weekly Online Coffee & Chat



Of those aware, 28% commented they have attended at least one session, while another 8% indicated they intended to join but had not yet managed to do so. Three (3) people indicated they were aware but were not interested or did not consider the opportunity relevant to them.

Of those who were aware, 22.5% had not attended because they had not had the time. Where comments were given, people indicated a willingness but a lack of opportunity. For example:

- *"too busy but have passed information to another in the organisation";*
- *"have run out of time as other things come up. I am at home and at site currently";*
- *"I have struggled to be able to attend, are they recorded?°";*
- *"sadly time isn't my friend at the moment";*
- *"I've not attended and have been out doing things at that time. Would like to and think it's a great idea";*
- *"currently I have not been able to attend due to other work commitments".*

° 4 respondents who were unable to attend did express interest in being able to access a recording of the meeting – either as a Word version or a video link of the meeting.

Where an answer was provided, weekly sessions were deemed to be appropriate, though some acknowledged this may need to be extended to fortnightly or even monthly once business begins to return to a new normal. Others thought weekly worked as it allowed for them to miss one week but still have a regular opportunity to touch base.

Five people (6.5%) did suggest alternate running times, indicating that an earlier start time of 8 or 9am (n=4), or after 2pm (n=1) would be more convenient.

Though not solicited, 17% of respondents acknowledged the online chat sessions were a '*great idea*' or '*excellent*'. As one stated, this *"is the best thing to do for members".*

3.0 Implications of Findings

3.1 How the findings align with other jurisdictions

The challenges represented by the QORF members who responded to the structured interview questions are like emerging findings from other outdoor focused agencies in other similar jurisdictions. For example, results from an April survey conducted by the Outdoor Industry Association (OIA) (USA) investigating business impacts from the COVID-19 pandemic revealed:

- more than 50% of outdoor industry respondents project their businesses will have reduced returns of between 41% and 100% in the first half of 2020;
- 25% of businesses have suspended all operations;
- 54% of businesses have suspended a portion of their business operations;
- 80% of outdoor retailers have had to put a hold on orders or in-transit inventory; and
- the majority of businesses want to take advantage of government provided loans to make payroll (Paycheck Protection Program) and/or to cover rent or mortgage costs (under the US CARES Act), but small businesses in particular have struggled with negotiating the administrative requirements (Outdoor Industry Association, 2020).

Similarly, the Outdoor Recreation Roundtable (ORR)[9] undertook a member survey[10] in collaboration with the Oregon State University Outdoor Recreation Economy Initiative. This survey revealed that of the outdoor recreation businesses that were represented in the findings:

- 89% are experiencing difficulty with production and distribution;
- 79% have laid off or furloughed members of their workforce, with 11% closing or laying of most or all of their staff; and
- 89% are experiencing a decrease in sales, with 39% experiencing a decrease of 70-75% or higher (Outdoor Recreation Roundtable, 2020).

More expansively the ORR also indicate that recreation-based communities that offer gateways to outdoor recreation are experiencing disproportionate unemployment with these figures sitting at 57% in Colorado and 25% in New Mexico.

Recent results from surveys of outdoor organisations (237) and outdoor professionals (393) involved in outdoor learning in the UK projected that revenue lost until mid-2021 was estimated to be £275m, with many organisations expecting to close or not recover in time. Based on their surveys:

- the sector has been shutdown during its two busiest trading quarters;
- 78% of organisations are currently taking advantage of government support;
- 72% have furloughed some or all of their workforce; and

[9] The ORR represents a coalition of outdoor recreation trade associations in the United States. Its brief includes promotion of the outdoor recreation economy and outdoor recreation activities and it advocates for balanced policies and enhanced infrastructure for outdoor recreation.

[10] ORR surveyed 20 national outdoor recreation trade associations who represent businesses with just under 2 million employees.

- 70% of organisations have experienced cancellation of all or the majority of their outdoor services (Institute of Outdoor Learning, 2020).

3.2 Policy Principles

Based on the comments provided by the interview respondents, as well as an assessment of policy and funding initiatives being implemented by Australia's peers in delivering opportunities for sport and outdoor recreation, the following principles may help inform discussion and decisions on future Queensland policy:

- We acknowledge the value of the outdoor sector in contributing to the health and wellbeing of our citizens and communities.
- We recognise the sector will benefit from funding to help them *develop* and implement new ways to keep people engaged and to be able to *adjust* their business or delivery model to a new context.
- We will provide support to *individual businesses and organisations* to help them maintain and build capacity to resume or reframe their outdoor recreation services AND we will provide *sector support* to drive demand and enable outdoor activities (e.g. the opening of outdoor spaces, community awareness of outdoor recreation opportunities, and capacity building professional development for organisations/ individuals etc).
- We acknowledge that access to, and the condition of, outdoor places and infrastructure are key drivers to outdoor activity participation and the ability to reap economic and wellbeing outcomes from that participation.
- We will be *flexible* in the expected deliverables for those receiving funding through Queensland Government agencies so that KPIs, targets or conditions can pivot, and support can be directed to new activity or models that better respond to changes demanded by the coronavirus pandemic[11].
- We will be open to supporting outdoor organisations to 'reset', not just 'snap-back' where this is possible.
- We will help outdoor recreation organisations respond to short term cashflow concerns, loss of income and lack of security for staff, as well as support medium- and long-term survival challenges.
- We will direct support to initiatives that inform and stimulate the sector e.g. by helping them adapt to change, support understanding of social and operational adjustments, that activate or accelerate delivery of great ideas, that build resilience, that re-engage staff and volunteers.
- We will provide certainty of funding for a period of 2 years.[12]

Additionally, the Outdoor Council of Australia (OCA) have identified an alternate set of National Principles for Rebooting of Outdoor Activities. These are modelled off the AHPPC Principles and AIS

[11] This is already being promoted by the Department of Housing and Public Works and is communicated on their website under Funding Arrangements on COVID-19: Sport and active recreation providers announcement 27 March 2020, 5.05pm: https://www.hpw.qld.gov.au/news-publications/news/covid-19-sport-and-active-recreation-providers.

[12] These principles are informed by collating and assessing initiatives being introduced or promoted by Sport England, Sport New Zealand, Canadian Parks and Recreation Association as well as from research based best-practice recovery guidelines.

Framework for Rebooting Sport in a COVID-19 Environment but where these latter documents *allude* to outdoor recreation or treat it as a *variation on sport* models, the OCA document reframes the underlying ideas putting outdoor activity at the centre thereby ensuring protocols and preparations can be targeted and compelling for *this* sector.

3.3 What can Queensland policy makers do to help?

- *Keep outdoor areas open and accessible* where this can be done safely and within health and local visitor guidelines.
- Ensure *timely, consistent and clear guidance*, regarding the opportunities for delivery of service for outdoor providers, their partners, workers and their clients.
- Recognise that *small to medium enterprises* (SMEs) and not for profit organisations make up a solid proportion of the outdoor recreation sector in Queensland.
- *Establish and resource protocols to meet enhanced public health requirements* (e.g. deep clean of infrastructure, investment in infrastructure adjustments such as non-touch hand washing stations, COVID-Safe plans).
- Implement emergency/ stabilisation funds, interest free loans to support outdoor sector especially for Not-for-Profit community services.
- Recognise the outdoor sector has a *vital role* to play in supporting the health, resilience and wellbeing of Queenslanders AND that the providers, clubs, ancillary organisations, educators, trainers, spaces and places for outdoor activity are part of the *cornerstones of community* AND that the sector is experiencing a range of financial, affective and operational challenges with no finite end.
    - Provide support for outdoor organisations who are financially impacted by COVID-19 restrictions to cover administration and ongoing business costs such as – insurance, rent or facility hire, power, phone, audit fees, IT support, accountancy support, cancellation costs, member fees, costs associated with event and/or major meeting cancellations etc.
    - Expand support funding to maintain basic functions for organisations that fall outside current investment guidelines (e.g. outdoor trainers, activity providers, ancillary services).
    - Support the outdoor sector in adaptation of their service models, including, for example, how to pivot delivery to online (or other creative) formats and how to digitally create a sense of community.
- Implement funding or policy support that is informed by an appreciation that ongoing change creates anxiety, that closure of outdoor recreation spaces and places impacts on outdoor recreation provision (personal or supplied), and that budgets will be tightened (for suppliers and clients/ user groups) and that for them to survive, they will need support.

4.0 Conclusion

This report provides initial indications of the current and potential long-term impacts COVID-19 is having, and can have, on the Queensland outdoor sector. The implications of the global pandemic and the essential responses to it, will have enduring effects on this sector and to acknowledge, alleviate and mitigate these will require intentional responses.

This project has revealed that while the outdoor sector may be skilled in risk and crisis management and have much to offer others in terms of contribution to mental health and resilience, the sector will suffer as the duration of restrictions continue. For example, those who rely on working with schools have lost (at least) Term 2 & 3 programme delivery[13] which impacts their income, leading to a loss of staff and expertise and amplifying financial difficulties. For some this comes on top of reductions already felt from diminished Term 4 2019 and Term 1 2020 camps and programmes because of bushfires and Education Queensland policy preventing any activities taking place outdoors due to the likelihood of poor air quality.

Additionally, the whole sector has been impacted (like hospitality, retail, tourism etc) with the majority of respondents indicating that while they were *mostly certain* their organisations would still be able to resume activities in 6 or 12 months-time, the speed of their recovery, their capacity to implement physical distancing practices and their access to qualified and experienced staff are much less certain (refer to Appendix Two).

The outdoor sector see that they are an essential part of sustaining and maintaining the health, wellbeing, personal development, learning and lifestyle of Queenslanders. For them to be able to realise these outcomes in the future however, they need greater certainty. This will come not only from clear communications, guidance and sector-wide support to reopen safely[14]; but also from enhanced awareness - by government, schools and the community - of their value, importance and potential to contribute to Queensland's recovery.

[13] Terms 2 and 4 are regularly seen as particularly busy for residential and school outdoor programmes though the seasonal variations appear to be reducing with consistent programs held across the school year.
[14] Sector-wide support will need to include not just the potential to reopen, but for all support resources to also be activated e.g. access, transport, overnight accommodation, travel etc.

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Appendices

Appendix One: QORF Member Call Script: 22 April 2020

Sport & Recreation / QORF Interviews

Hi, this is …

I am from the Queensland Government, Department of Housing and Public Works (Sport and Recreation) and I am assisting the Queensland Outdoor Recreation Federation by contacting its members to see how things are going in these interesting times and to investigate the impact of COVID-19 on the recreation sector so that the Queensland Government can better understand what they could do to assist going forward.

Do you have time to chat, and maybe answer a few questions please? If you don't feel comfortable discussing with me, Mark Squires & Dom Courtney from QORF would be happy to discuss with you directly, if you would prefer.

…….

Before we start, I would like to advise you how the information you provide during this call will be used by the department and QORF.

> Your responses and information provided as part of this telephone call, including any personal information or confidential information will be recorded in a spreadsheet and stored on the department's network. It will be provided to QORF in an electronic format and stored on a cloud based platform.
>
> Your responses and information provided will be used by QORF to provide a better understanding of the impacts of COVID-19 crisis, and allow them to tailor industry support and advocate on behalf of the outdoor sector to government. It will be used by the department to provide advice to government and determine appropriate government responses, in relation to COVID-19. The department may share your response, your organisation's details and information provided during this call with its Minister, other State and Commonwealth Government agencies, cabinet (or members of cabinet), the department's contractors and/or other industry peak bodies, for the purposes of providing advice to the department in relation to a Queensland Government COVID-19 response. Your responses and information will otherwise be treated by the department as confidential. The department may collate the information received through this process and publicly release or publish data and statistics in an aggregate and non-identifiable form.
>
> Where your responses include personal information, please ensure that you have obtained consent from the relevant individual, for the department to use their personal information as set out above.

Do you have any questions?

Please confirm whether you are happy to proceed with the questions, on the basis of the above.

If any time you don't feel comfortable providing information or answering a particular question, please let me know.

Please understand that I am fairly new to the outdoors sector and am probably not fully aware of what you/your business does.

Some of the following questions are quite personal, and it is ok if you don't feel comfortable to answer them. By answering, you are helping QORF to better do its job, but it's ok to skip questions.

QUESTION

1. Would you kindly start by briefly explaining what your business does
2. What has been the effect on the number of paid and/or volunteer workers in your organisation?
3. What impact has there been on your revenue? (Scale from 1 to 10, where 1 is minor and 10 is major)
4. What impact has there been on your expenses? (Scale from 1 to 10, where 1 is minor and 10 is major)
5. How confident are you that your organisation will still be operating in 6 months' time? (scale of 1 to 10, where 1 is very unsure and 10 is certain)
6. How confident are you that your organisation will still be operating in 12 months' time? (scale of 1 to 10, where 1 is very unsure and 10 is certain)
7. What are your top 3 major concerns relating to COVID 19 right now? Business related
8. How are you and your staff coping with all this? *
9. What are the top 3 key things you would like the Government to understand about the outdoor recreation sector in general?
10. Are you aware that QORF has been running weekly online 'Coffee & Conversation' sessions for the last few weeks? Currently they are being held weekly on a Friday. The idea is to provide a way for the outdoor sector to remain connected, to share concerns and to discuss ideas – between 40 and 50 people have participated each week so far. If so, how often do you think QORF should host these online chats? If you would like to attend in future, information is available on the QORF website at https://qorf.org.au/whatson

Thank you for your time today – if you have any questions or concerns going forward please do give QORF a call on 3369 9455– who are very happy to chat and see what can be done.

IF CONVERSATION IS GOING ON TOO LONG - Appreciate your time, know you have a lot to do, thank you so much for talking to us and sharing your valuable information.

*Some people may not be comfortable discussing details with complete strangers – as both Mark & Dom know many of them, you may want to offer a chat with either of us as an option.

COMMENTS REGARDING CLOSURE OF OUTDOOR REC PLACES AND SPACES: I am unable to comment or assist you with that question/enquiry/suggestion. Please call 137468 who can direct you to the appropriate State Government agency for access to State owned assets, or the responsible owner for other assets (such as the local Council etc).

Message bank script – Judy here from Department of Sport and Recreation on behalf of QORF. I am contacting members of QORF to see how things are going and to investigate the impact of COVID-19 on the recreation sector.

Appendix Two: Early Impacts of COVID-19 on the Outdoors Sector in Queensland Infographic

THE EARLY IMPACTS OF COVID-19 ON THE OUTDOORS SECTOR IN QLD

Reported impacts of COVID-19 on members of QORF, those working in and for the outdoors sector in Queensland in April 2020

QORF
LIVE LIFE OUTDOORS

THE OUTDOORS SECTOR IS VITAL. IT POSITIVELY IMPACTS HEALTH AND WELLBEING, THE COMMUNITY, THE ENVIRONMENT, AND THE ECONOMY

Impacts of COVID-19 on QORF members:

Loss of staff

80% lost business resulting in staff needing to be stood down, work reduced hours, work from home, or rely on JobKeeper.

18% have no work for their casual or non-essential staff and have had to stand them all down.

Retaining trained staff is a concern. Many staff are ineligible to receive JobKeeper status due to casual work arrangements or organisation business model.

Loss of revenue

68% are experiencing major impacts on their revenue.

State Recreation Organisations, Activity & Tour Providers, and Campsite & Conference Centres indicated the greatest impacts.

The impacts of COVID-19 are amplified following a season of drought and bushfires.

Future operations

70% indicate strong levels of certainty they will be operating in 6 months' time.

60% have a strong level of confidence they will be operating in 12 months' time.

Uncertainty regarding:
- domestic & international travel restrictions
- customers' capacity to pay
- funding for support staff
- declining value of outdoor recreation/education, and
- lack of policy priority for outdoor planning, design and maintenance.

Derived from: The Early Impacts of COVID-19 on QORF Members

Queensland Outdoor Recreation Federation (QORF). www.qorf.org.au