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The impact of COVID-19 on the Australian outdoor recreation industry from the perspective of practitioners

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ABSTRACT

The COVID-19 pandemic has impacted, and continues to impact, the viability of many industries worldwide. In Australia, the outdoor recreation industry, already severely affected by the summer 2019–2020 bushfires, was further affected by COVID-19 restrictions including internal border closures, stay at home orders, social distancing requirements and travel restrictions. We surveyed outdoor recreation industry representatives in Australia to assess the impact of COVID-19 on professionals in the industry, views on career choices, and perspectives on the future of the industry in a post-COVID world. We found that COVID-19 affected outdoor recreation businesses in multiple ways, with a pessimistic outlook for the industry until travel restrictions and social distancing requirements are eased and economic confidence returns. This is unlikely to happen until vaccinations are rolled out nationally and herd immunity has been achieved. Even after this, however, the industry is likely to continue to suffer through loss of qualified staff and the flow-on effects of the imposed pause in guided outdoor recreation and tourism activities. We identify an urgent need for the industry to adapt and futureproof itself against future disruptors, including the very real possibility of future novel virus epidemics or pandemics.

1. Introduction

Soon after its public emergence in January 2020, COVID-19, the coronavirus disease caused by the severe acute respiratory syndrome coronavirus 2 (SARS-CoV-2) (WHO, 2020), rapidly developed into a global pandemic. Due to its rapid spread, global reach, intensity and cross-sectorial impact, COVID-19 has no predecessor. At each national level, government reactions to curb or slow the progress of COVID-19 have involved, to various degrees and duration, the reduction of international arrivals to repatriation flights, limitations to domestic travel, the temporary shut-down of non-essential businesses, and the restriction of human movement during periods of ‘lockdown’ (i.e. stay at home orders) (Chinazzi et al., 2020; Moloney & Moloney, 2020). That lockdown found different levels of expression (Askitas, Tatsiramos, & Verheyden, 2020), ranging from limiting movement to accessing food, health care and limited daily exercise (Australia) (Shakespeare-Finch et al., 2020) to only being allowed to leave the house for food and health care every second day (Panama) (Woskie & Wenham, 2020) or not at all (youth under 20, Turkey) (Kanbur & Akgül, 2020). Once the lockdown conditions were eased, people rapidly, or gradually, resumed prior activity patterns (Spennemann & Parker, 2020), even though the pandemic remained uncontrolled in various parts of the world and...
despite the fact a second and third wave often has and may still occur.

Analyses conducted in the second part of the second decade of the twenty-first century showed that the Australian outdoor recreation sector was a major contributor to economy at state and national level (Cheesman, Jones, & Scealy, 2018; Marsden Jacob Associates, 2017, 2020) with an estimated contribution of 11 billion/p.a. and the providing employment for between 16,000 and 30,000 full time equivalent positions (SkillsIQ, 2021). While the industry forecast for the entire outdoor recreation sector in 2019 projected a general increase in employment opportunities in 2020–2022, the realities of COVID-19 induced unemployment, despite government financial incentives, saw a dramatic drop in employment. The effects of COVID-19 notwithstanding, the Australian Industry and Skills Committee anticipates a snapback to a pre-COVID trajectory in 2021 and 2022 (AISC, 2021).

When considering the impact of COVID-19 on general outdoor and adventure outdoor recreation, there is a need to differentiate between the tourism industry at large, which relies on the consumption of travel, accommodation and participation in organised activities, and individual participation in outdoor recreation. In a global perspective, the termination of personal and elective international and domestic air travel, or its restriction to repatriation flights (Lau, Khosrowipour, Kochach, Mikolajczyk, Ichii, et al., 2020; Lau, Khosrowipour, Kochach, Mikolajczyk, Schubert, et al., 2020) had immediate flow-on effects to the tourism industry (Gössling, Scott, & Hall, 2020; Lau, Khosrowipour, Kochach, Mikolajczyk, Ichii, et al., 2020) and through that to the communities and conservation organisations that rely on tourism income (Newsome, 2020) with concomitant social costs (Qi, Park, Li, & Song, 2020).

While COVID-19 is a cross-sectoral disruptor, people were forced to gradually adapt to the new realities and adjust their behaviour and expectations. A comparative study found that participation in health and leisure activities at least initially decreased more in countries with restrictive health policies (hard lockdown, social distancing), than in countries with less restrictive regimes. As time went on, participants adjusting to the new realities and participation rates increased to almost 70% of pre-pandemic levels (Fang, Zhu, Jiang, & Wu, 2021). This, however, reflects individual participation in outdoor recreation. Indeed, the repeated lockdowns and movement restrictions led to an increased use of the local outdoor environment, in particular urban and peri-urban green spaces (Geng, Innes, Wu, & Wang, 2021; Grima et al., 2020; Venter, Barton, Gundersen, Figari, & Nowell, 2021; Volenec, Abraham, Becker, & Dobson, 2021). With international leisure travel essentially cancelled out, the easing of lockdown restrictions resulted in an increased demand for domestic tourism and ‘micro-adventure’ opportunities (Mackenzie & Goodnow, 2020) and a concomitant increased utilisation of outdoor spaces such as national parks (O’Connell, Howard, & Hutson, 2020; Rice et al., 2020; Rice, Mateer, Taff, Lawhon, & Newman, 2021). This increased demand was not uniform, however, with risk-tolerant households engaging in greater activity (Landry, Bergenstam, Salazar, & Turner, 2021). Repeated lockdowns, coupled with subsequent limitations on participant ratios due to the imposition of social distancing rules, led to a downturn of the outdoor recreation industry. Lacking the provision of guided and safe adventure outdoor recreation experiences, individual visitation of outdoor spaces resulted in an increased utilisation of unfamiliar environments (Grima et al., 2020) and unfamiliar conditions. Overall unpreparedness and underestimation of risks led to an generally increased exposure to environ-mental hazards (Fernandez et al., 2020) and a subsequent increased demand on rescue operations as some activities exceeded the capabilities of participants (Saladie, Bustamante, & Gutierrez, 2021).

In early 2020, many parts of Australia were already dealing with the aftermath of the 2019–2020 summer bushfires, covering nearly 13 million ha, including national parks, the “most devastating, in terms of area and scale” that Australia has experienced since records began (Bartel & Branaan, 2020, pp. 125–144). Many national parks were closed due to fire damage, with some remaining closed throughout 2020 (Parks Victoria, 2020). This severely affected the outdoor industry, which relies on access to publicly managed lands for siting and conducting its activities. The impact was disproportionate in south-eastern Australia, where the population density is the highest and where fire impacts were the greatest.

In March 2020, Australia closed its international borders, with state borders closing in various forms from late March (Moloney & Moloney, 2020), restricting travel both into and within Australia. As with many other countries, Australian schools closed and non-essential workers were required to work from home, or not work at all (Moloney & Moloney, 2020). Many outdoor recreation and tourism activities occur in public open spaces such as national parks, and many of these were closed at the onset of COVID-19 in Australia (Moloney & Moloney, 2020). Due to the combined effects of stay at home orders and park closures, visits to parks and outdoor spaces, including national parks, decreased by 30–40% throughout April and May 2020, compared to a baseline of 5 weeks in January and February 2020 (Ritchie, 2020).

The aim of the study is to understand the effect of COVID-19 on the Australian outdoor recreation industry, and to examine future trajectories. To this end we carried out a survey canvassing industry representatives in Australia as well as graduates of outdoor recreation and ecotourism degrees at Charles Sturt University. While we focussed on graduates of the university where the authors are employed, with the inclusion of industry respondents they can stand in as a representative proxy of the industry as a whole in Australia. Our aims were to assess the impact of COVID-19 on professionals in the industry, obtain views on career choices, and examine perspectives on the future of the industry in a post-COVID world.

2. Methodology

In September and early October 2020 two variant surveys were administered via SurveyMonkey™, one targeting the representatives of the outdoor recreation industry and the other all graduates of Outdoor Recreation courses offered by Charles Sturt University. The purpose of the survey was two-fold. To obtain quantitative and qualitative information on i) the perception the Charles Sturt University’s degree offerings in outdoor recreation and education for purposes of quality assurance and a review of the university degree structure and ii) the perceptions of the impact of the COVID-19 pandemic on the outdoor recreation industry. The questions related the Charles Sturt University’s degree offerings looked at student employment, subsequent career trajectories, applicability of course content and the like as well as questions related to perceptions of the impact of COVID-19. The findings associated with in-house corporate quality assurance are embargoed by Charles Sturt University as commercial-in-confidence. The findings of relating to COVID-19 (combined with demographics), are reported here.

2.1. Questionnaire

The survey comprised of closed and open-ended questions organised in three sections: demographics (gender, ABS age bracket, state of residence, year of graduation); in-house corporate quality assurance questions (21 questions); and questions related to COVID-19. These latter questions are set out in Table 1.

2.2. Sample of graduates

The sample of graduates of the BAppSci (Adventure Ecotourism) (2003–2012), Bachelor of Outdoor Education (2015–2020) and the BAppSci (Outdoor Recreation & Ecotourism) (2013–ongoing) was derived from an in-house corporate database of graduated students. All graduates of relevant courses were sent a personal invitation via e-mail. Due to internal timeline constraints, the normal spacing of two weeks between initial mailouts and subsequent reminders (Sarantakos, 2008) could not be maintained. Following the initial mailout on 3 September
Climbing Guides Australia and Adventure Tourism Victoria. Following industry organisations Outdoors NSW was amplified through snowballing via a call for participation sent to the initial mailout on 7 September 2020, reminders were sent on 14 September and 20 September. Given the fact that all proprietors/business owners were asked to complete the survey themselves, as well as pass it on to their staff, and, given that the survey was sent to the industry organisations, to pass on to their members, the size of the actual survey population is uncertain. Consequently, it is impossible to calculate a response rate and to thus ascertain the representativeness of the industry survey (O’Neill & Spennemann, 2004). In total 27 responses were received on the impact of COVID-19 (Table 3).

Table 1 Questions analysed in this paper.

| Demographics | Owner/Manager | Employed in industry | Not longer in industry | Total |
|--------------|---------------|----------------------|------------------------|-------|
| Gender       |               |                      |                        |       |
| Female       | 6             | 13                   | 13                     | 32    |
| Male         | 9             | 18                   | 25                     | 52    |
| Rather not   | 1             | 1                    |                        | 1     |
| Age cohort   |               |                      |                        |       |
| 20-24        | 1             | 1                    |                        | 2     |
| 25-29        | 1             | 10                   | 9                      | 20    |
| 30-34        | 2             | 7                    | 16                     | 25    |
| 35-39        | 4             | 3                    | 5                      | 12    |
| 40-44        | 1             | 1                    | 2                      | 4     |
| 45-49        | 2             | 1                    | 2                      | 2     |
| 50-54        | 2             | 1                    | 3                      | 3     |
| 55-59        | 2             | 1                    | 3                      | 3     |
| 60-64        | 2             | 1                    | 3                      | 3     |
| 65-69        | 1             | 1                    | 1                      | 1     |
| Grand Total  | 16            | 31                   | 38                     | 85    |

Table 2 Demographic parameters of the respondent population.

Table 3 Response rate to individual questions (open-ended questions shown in italics).

| Question                                                                 | Owner | Current | No longer |
|---------------------------------------------------------------------------|-------|---------|-----------|
| Has the COVID-19 pandemic affected you in your professional capacity?     | 93.4  | 100.0   | 100.0     |
| How has the COVID-19 pandemic affected you in your professional capacity? | 68.8  | 71.0    | 71.1      |
| What are the major challenges for the industry in the post-COVID world?   | 75.0  | 74.2    | 84.2      |
| Has the COVID-19 pandemic made you question your career choice?           | 100.0 | 100.0   | 100.0     |
| If you answered yes to Q23, can you please elaborate and tell us why?    | 25.0  | 38.7    | 28.9      |

2.4. Data analysis

The questions analysed in this paper are set out in Table 1. The processing of data derived from closed questions occurred in MS Excel as an exploratory analysis with descriptive statistics. As all responses were anonymous, any direct quotes are attributed to individuals in angular brackets (e.g. “[F1]’) which are resolved by gender, age bracket, state and employment type (e.g. ‘business owner’) in Table 4. The overall number of qualitative responses was small enough to permit collation, grouping and textual analysis of the responses to each question without the need of use analytical software such as nVivo.

3. Results

The effects of the COVID-19 pandemic were pervasive in the industry, with a significant majority of respondents reporting loss of

Table 4 Characteristics of the respondents cited in the paper.

| M1-Male, 40-44, NSW, business owner/manager | 16, NSW, no longer in industry |
| M2-Male, 45-49, Vic, business owner/manager | 17, Vic, no longer in industry |
| M3-Male, 25-29, NSW, employee in industry | 18, NSW, employee in industry |
| M4-Male, 30-34, Vic, employee in industry | 20, Vic, employee in industry |
| M5-Male, 25-29, SA, employee in industry | 20, SA, employee in industry |
| M6-Male, 25-29, NSW, employee in industry | 20, NSW, employee in industry |
| M7-Male, 25-29, Vic, employee in industry | 20, Vic, employee in industry |
| M8-Male, 30-34, NSW, no longer in industry | 20, NSW, no longer in industry |
| M9-Male, 30-34, Vic, employee in industry | 20, Vic, employee in industry |
| M10-Male, 50-54, SA, employee in industry | 20, SA, employee in industry |
| M11-Male, 30-34, Vic, no longer in industry | 20, Vic, no longer in industry |
| M12-Male, 30-34, NSW, employee in industry | 20, NSW, employee in industry |
| M13-Male, 25-29, NSW, employee in industry | 20, NSW, employee in industry |
| M14-Male, 30-34, no longer in industry | 20, NSW, no longer in industry |
| M15-Male, 25-29, Vic, employee in industry | 20, Vic, employee in industry |
| M16-Male, 40-44, NSW, no longer in industry | 20, NSW, no longer in industry |
| M17-Male, 30-34, ACT, no longer in industry | 20, ACT, no longer in industry |
| M18-Male, 50-54, Qld, business owner/manager | 20, Qld, business owner/manager |
| M19-Male, 30-34, Vic, no longer in industry | 20, Vic, no longer in industry |
| M20-Male, 20-24, NSW, no longer in industry | 20, NSW, no longer in industry |
| F1-Female, 60-64, NSW, business owner | 20, NSW, business owner |
| F2-Female, 55-59, Vic, business owner | 20, Vic, business owner |
| F3-Female, 20-24, NSW, employee in industry | 20, NSW, employee in industry |
| F4-Female, 35-39, Vic, employee in industry | 20, Vic, employee in industry |
| F5-Female, 20-24, NSW, employee in industry | 20, NSW, employee in industry |
| F6-Female, 30-34, Vic, employee in industry | 20, Vic, employee in industry |
| F7-Female, 25-29, NSW, no longer in industry | 20, NSW, no longer in industry |
| F8-Female, 25-29, Vic, employee in industry | 20, Vic, employee in industry |
| F9-Female, 30-34, NSW, employee in industry | 20, NSW, employee in industry |
| F10-Female, 35-39, Vic, no longer in industry | 20, Vic, no longer in industry |
| F11-Female, 30-34, NSW, no longer in industry | 20, NSW, no longer in industry |
| F12-Female, 30-34, NSW, no longer in industry | 20, NSW, no longer in industry |
| F13-Female, 45-49, NSW, business owner/manager | 25, NSW, business owner/manager |

NI—no gender stated, 30–34, Qld, business owner. ACT—Australian Capital Territory, NSW—New South Wales, Qld—Queensland, SA—South Australia, Vic—Victoria.
income, reduced work hours, loss of clients, reduced ability to take clients to locations and reduction in mental fitness, as well as many other challenges (Table 5). In terms of former graduates, the experienced extent of losses of those who were still active in the industry was not significantly different from those graduates who had since left the industry and had begun work in allied professions (teaching, travel industry, environmental management, etc.). Views on the future of the industry in a post-COVID world were nuanced, with some immediate challenges but also opportunities identified. These aspects are discussed further in the remainder of this section.

3.1. Impact of COVID-19 on professional capacity

The total lockdowns associated with the early stage of the COVID-19 pandemic in Australia, and the subsequent restrictions on activities with social-distancing requirements and limits on the numbers of participants, meant that many providers were constrained in what kind organised outdoor adventure activities they were able to offer. That had a direct flow through on the viability of businesses as well as the personal income of business owners and employees. All business owners reported loss of income for their company, with 77.4% staff employed in the industry stating the same (Table 5). As one business owner stated: “It financially crushed the capacity of the business to be a profitable venture with no light at the end of the tunnel at this point in time” [M1]. Company owners had to adapt to the situation where possible. As one operator explained:

“I run a[n] adventure tourism company which has a 90% reduction in earnings. This means that my business partner and I have had to adapt our programs, events and other aspects of our business to ensure its survival. We have a membership program and are finding it difficult to fulfill the obligations under this membership plus remain confident and positive, and continue to motivate our clients.” [M2]

More ominously for the future of businesses is the loss of staff. Operators “had to let go of staff who were highly competent and experienced after a high level of investment from [the] organisation. There is no guarantee we will receive return on investment which threatens future training and investment resources” [M5]. The implications this has for the industry are discussed in a separate section below.

The loss of company income also translated into a reduction of personal income of 87.5% of the business owners and 71% of staff employed in the Outdoor Recreation industry. By contrast, fewer outdoor recreation graduates who no longer work in the industry reported a reduced personal income (55.3%).

As some operators conceded, however, COVID-19, while the single most influential disruptor, was not the sole cause for the economic strain. For many operators, COVID-19 came on top of an already challenging situation created in summer 2019/20 when the bushfires caused “total devastation of many spaces that we would take groups to. Infrastructure such as creek crossings, bridges and roads in remote areas have been damaged or destroyed, and the natural aesthetics that many clients come to enjoy is difficult to appreciate when everything is burnt” [M8]. For some operators, however, COVID-19 was (almost) the final straw given “the ups and downs I’ve experienced over many years with insurance premium hikes, former staff setting up in direct competition, bushfires, storms, weather instability, lack of snow, rivers too high or too low, and many other variables that we have no control over” [F2].

Just over half of the respondents employed in the industry (54.8%) experienced a loss of enjoyment in their jobs due to stresses (see below), general inactivity and not “feel[ing] challenged enough in a quiet in-dustry” [M3]. COVID-19 exacted a toll on the health of the respondents, both in terms of physical and mental fitness. This was particularly experienced by respondents employed in the industry, with a significant reduction in mental fitness asserted by 74.2% and a loss of physical fitness reported by 67.7%. Graduates who had left the industry were less affected (60.5% and 47.5% respectively) as were business owners and managers (62.5%/56.3%).

The toll on mental health is evident in many responses, with phrases like “emotionally depressed due to the uncertainty of the future” [F1], “we are living a nightmare” [N1] and “It is devastating. I’m so distressed that with all of the ups and downs I’ve experienced” [F2]. One respondent pointed to the cumulative effects of stresses of loss of job security and income, and the difficulties of maintaining both skill levels and personal motivation, concluding that “[a]ll this combined has led to severe mental effects for not just myself, but for just about every outdoor professional I know” [M6]. The isolating effects of COVID-19, while not unique to the outdoor recreation profession, also had mental health impacts, as shown in this response: “I have struggled with a few things but a major event was the loss of a co-worker (due to a sudden heart attack). Felt like I was unable to grieve as I was unable to be with co-workers at the time” [F3].

The mental health impact of COVID-19 had its flow-on effects. As one respondent noted, “my mental health has been affected and with it my motivation to perhaps perform to the standard I was before” [M3]. The lack of motivation, due to a lack of interaction with clients and co-workers, was echoed by several other respondents. In outdoor recreation, the perception of risk, as well as the actual risk of an activity, needs to be matched with technical competence in order to achieve a peak outcome (Cater, 2006; Priest, 1990). Outdoor leaders need to be at a technical skill level that exceeds that of their clients. The COVID-19 induced lack of practice resulted in 61.3% of respondents employed in the industry and 50% of business owners and managers asserting a perceived reduction in skill sets, compared to only 39.5% of graduates who had left the industry (Table 5). While one of the respondents commented that she “hope[ed] this lack of work has not affected me in any professional way, but it may take a minute to refresh myself on techniques once I start up again” [F4], others were much more sanguine:

“it’s very difficult to maintain the skills required to be an effective guide. The hard skills are easy to practice as we’ve got time to go out and practice abseiling, canoeing etc. What we can’t practice is the soft skills you need such as maintaining high energy with clients, empathy and positive communication” [M6]

The prolonged situation brought about by COVID-19 has additional, unforeseeable consequences that have flow-on effects on the restart of

| Table 5 | Proportion of respondents answering in the affirmative that the COVID-19 pandemic affected them in their professional capacity. Significance as deviation from 50% (***p < 0.1; **p < 0.05, *p < 0.01). |
|--------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Owner/Manager | Employed in industry | No longer in industry |
| Your company/workplace went out of business | 18.8 | 38.7 | 18.4 |
| Loss of income for your company/workplace | 100.0*** | 77.4** | 57.9 |
| Reduced income (personal) | 87.5** | 71.0* | 55.3 |
| Total loss of income (personal) | 31.3 | 41.9 | 26.3 |
| Reduced work hours (personal) | 50.0 | 71.0* | 50.0 |
| Loss of staff | 68.8 | 45.2 | 34.2 |
| Loss of co-workers | 62.5 | 45.2 | 36.8 |
| Loss of clients | 87.5** | 74.2* | 60.5 |
| Reduced ability to take clients to locations | 87.5** | 100.0*** | 57.9 |
| Reduction in skills (due to lack of practice) | 50.0 | 61.3 | 39.5 |
| Reduction in physical fitness | 56.3 | 67.7 | 47.4 |
| Reduction in mental fitness | 62.5 | 74.2* | 60.5 |
| Loss of enjoyment of your job | 37.5 | 54.8 | 34.2 |
| N | 16 | 31 | 38 |
the industry, but also the frame of mind of staff. As one respondent explained,

“[m]y inability to remain competent in certain hard skills (re-certification) especially for first aid and leading groups in remote areas due to COVID restrictions has meant that I technically am no longer competent to Adventure Activity Standards. I can either ignore these standards to keep working and hope that I can get re-certified soon or do the right thing by industry standards (not guide), which would effectively see my job role terminated” [M5].

3.2. Reassessing career choices

The COVID-19 pandemic acted as a disruptor in the respondents’ ability to perform their work due to the enforced lockdown and subsequent restrictions. What had been perceived as a growth industry was suddenly in peril. As one respondent noted: “[t]he shock and the way the industry has so rapidly been shut down has ... forced myself and other highly experienced staff to consider other industries that are more resilient to future threats” [M5]. The enforced period of inactivity gave pause to many respondents to reflect on and re-evaluate their work life. As another respondent opined: “I have come to realise this industry is not what it once was” [M7]. When asked whether the COVID-19 pandemic had made the respondent question their career choice (Q23), 41.9% of respondents employed in the industry and 42.1% of graduates no longer working in the industry answered in the affirmative, compared to only 25% of the business owners/managers. In the open-ended answers (Q24), many respondents commented on the demands placed on them, the risks taken, the resulting burn out during peak season, and work hours that are not conducive to relationships and family life, all while working for comparatively low pay:

“The current situation has changed the way I have perceived the way I am being paid, the risks I am taking for my current pay check (this is because of the COVID restrictions). I am actually leaving my job due to these concerns and lack of clients. I need to find another path. It’s a hard time” [M3].

To many respondents, COVID-19 demonstrated the risks involved when working in a seasonal industry with generally low job security. The perceptions of an industry under pressure with low or depressed future employment prospects forced many to rethink their career prospects.

“Security in the Outdoor recreation [industry] is hard to find even in good times. As I get older and look for stability it is increasingly hard to see how this industry can offer this in terms of a meaningful wage, job security and general acceptance as an essential industry in Australian society” [M5]

Some respondents intended to future-proof themselves by developing fall-back options in allied outdoor-related industries such as horticulture and parks management, while others opined that they were leaving the industry earlier than planned to take up careers in teaching, policing, ‘the tech industry,’ the military and other unrelated fields. One respondent had her career dreams crushed even before she started out:

“I have just graduated into an industry that I thought would be thriving and upcoming for years to come and now the reality is that it is getting shut down, sanitised and ignored. I still want to work in the outdoors but ... outdoor recreation and ecotourism are so people orientated and COVID is really limiting these fields” [F7].

Others who were in firm employment, even though often on reduced wages, were intent on ‘toughing’ it out, mainly due to job safety and security and due to being unable “to change job roles due to unemployment level/job prospect level for the imminent future” [M4].

3.3. The future of the industry

Given the disruptive effect of COVID-19 and its prolonged impact on activities, staff and businesses, the survey also asked the respondents what they perceived to be the major challenges for the industry in the post-COVID world (Q22). The majority of the respondents deeply engaged with the question with a range of issues considered. These can be grouped as relating to rebuilding consumer confidence, rekindling consumer interest and meeting their expectations; operating as a COVID-safe product; business considerations; the state of recovery of the national economy; and future staffing profiles, and are discussed below.

3.3.1. Rebuilding consumer confidence, rekindling consumer interest and meeting their expectations

Another major area of concern expressed by many respondents was the need to rebuild consumer confidence in both the industry and the product, which in part relates to COVID-safe practices (see further below). As one business owner noted, “even if the green light [is] given, will clients have the confidence to return, [or] to send their children on camp activities?” [F2]. Respondents foresaw challenges in “making people feel ok about not sanitizing their hands every 5 s” [M9] so that they have “the confidence to head into the outdoors after such a long time in lockdown” [F4] and “getting people feeling comfortable to travel again, and possibly getting back to managing groups, especially where groups are in close contact with one another.” [M16].

On a more general level, respondents were concerned about the need to (re)connect clients with the product, emphasising “how important the outdoors are to peoples’ health and wellbeing” [F3], and “reminding people of and advocating for the value of the outdoor recreation industry to all individuals and communities” [F9]. In addition, the environmental effects of the summer 2019/2020 bushfires were also seen as a potential inhibitor for the post-COVID recovery of the industry, with a graduate no longer working in the industry noting that “in the post-bushfire age we will also need to re-educate people how to appreciate the Australian forest even when that forest is in a reflective state of destruction” [M8]. A fear expressed by one respondent working as a provider school was that “after so long ... clients may have come up with more affordable and effective ways to achieve their outcomes without the requirements of going beyond the school yards” [F7].

3.3.2. Operating as a COVID-safe product

Numerous respondents indicated that they and their businesses had tried to function in the post-lockdown environment of social distancing requirements as well as with limited numbers of participants. Not surprisingly, most respondents considered the immediate implications of COVID-19, such as the practicalities and costs of sanitizing of gear and social distancing. One graduate, no longer working in the industry summed it up thus:

“For the majority of outdoor activities, it is impossible to practice social distancing. There [are] very little options for putting people into kayaks, putting people onto surf boards, assisting people into transport vehicles or kitchen spaces and accommodation and still be socially distant” [M8].

Respondents perceived that some limitations would persist into the near-term future, both due to the continued existence of COVID-19 and the availability and effectiveness of a possible vaccine. They saw the challenge to “operate as COVID safe, but to not just have empty approved plans, but to be able to actually operate COVID safe as a far as is possible” [M6] Some respondents perceived this not to be a longer-term issue, however, placing the blame on the customers by labelling them ‘paranoid people’ [F12]. Another respondent was more nuanced in his assessment:
“I am personally concerned that people will have heightened anxieties around hygiene, germs, etc. … to simplify; people becoming germaphobes, and the idea of spending days out in nature, sleeping in a tent, cooking on a fire, no showers, no bathroom sink, etc, will scare them so much that they won’t engage in any outdoor recreation services” [M9].

Other respondents perceived the impact on COVID safe practices on staff, opining that “maintaining social distancing while trying to conduct an inclusive and safe outdoor activity brings a vast amount of mental strain and stress to the guide” [M8]. Future COVID safe practices required a complete rethink in operations, including “new risk assessments, new strategies … greater concerns for group size, transport arrangements, other participants backgrounds etc … communal activities will change … no more group lunch, help-yourself salads, [and] team activities,” all of which would “have profound effects on group size and therefore profit margins and staff/client ratios” [M2].

3.3.3. Business considerations

Just as any other industry, outdoor recreation and outdoor education providers found themselves subject to “compliance with ever changing expectations from state and federal government” [M18], noting that there was a “disconnect of the outdoor industry and people in authority/government taking decisions that impact our industry” [M10]. The ‘biggest challenge’ as seen by several respondents was “getting faith from policy makers” [F13] and “convincing government authorities such as Dept. of Ed. that [operators] can actually run programs in a COVID safe way” [M6].

But it was not only government that was considered an actor in providing external constraints. Numerous respondents had alluded to the impost of increasing insurance premiums on the profitability of their operations, noting that “insurance for adventure activities is becoming financially crippling or not accessible to businesses” [M13] and foreshadowing that one of the implications of COVID-19 was that “insurance companies are [now] also calculating this risk with [it] the cost and availability of public liability and personal insurance [which is] now more expensive to obtain or potentially not obtainable at all” [M5].

The sudden onset of COVID-19 related restrictions had led to widespread cancellations of holiday and other travel plans, requiring individuals to negotiate refunds or money guarantees. On a business level, respondents posited that consumer expectations would have changed, with post-COVID business operations having to consider “price, pay, payment schedules and money guarantees … will be especially important for clients and will have flow on effects in relation to T&Cs [terms and conditions], plus business to business relations and contracts” [M2] while at the same time leading to “pre-booking uncertainty, [with] more people [likely] to hang on until the last minute to book as most of the industry is offering credit and not refunds and no insurance company will pay out for any COVID-related loss” [M2]. On the other hand, the same respondent saw a silver lining, with the COVID uncertainties, combined with the issues related operating as a COVID-safe product (see below), would actually lead to “greater client retention, [as] people will stick to one company once they know and trust that company’s policies and procedures” [M2].

3.3.4. Recovery of the national economy

Australia’s economic recovery following COVID-19 and the levels of disposable income by families were of major concern to most respondents. This is hardly surprising, given the financial distress that many companies, as well as most individuals, experienced during lockdown as well as in the immediate period thereafter when restrictions applied to the type of activities and associated participant numbers. One operator was quite frank when he noted that “[w]ith a period of 12+ months of no or negative cash flow businesses will struggle to keep insurances and permits in place with no funds to keep them going” [M1]. Restarting the business, however, won’t be easy, as a female employee noted. In her view, the main challenge will involve “[g]etting a client base back as the economy has taken such a big hit. This industry is not an essential service for people so it will take time before people can afford to access it.” [F6] Several other respondents pointed to the fact that in the post-COVID world, any disposable incomes would be less and outdoor recreation would compete with other interests and demands. Indeed, as a former graduate, now working as a travel agent, put it pointedly:

“Domestic luxury (special treats) spending is going to be the last to recover. You are probably not going to pay $300 per person to go caving at Mt Buffalo if you have suffered reduced income over the past few months and you need to save for a larger personal goal” [F10]

The concern about the economic impact also extended to the education sector which for many operators pre-COVID was part of the ‘bread-and-butter’ market. One respondent was concerned about “[s]chools cutting funding [and] parents [being] unable to afford extracurricular activities within a school environment” [M12]. Others echoed the same sentiment, opining that “a downturn in the economy is going to see families in financial distress and … the outdoor education side of outdoor rec[reation] will suffer” [M19].

The second market segment that was frequently commented on were international tourists. By and large, respondents were negative in their outlook, at best noting “a decrease in international tourism” [M19] and at worst fearing “[b]orders will be closed for years to come effecting business that rely on tourists” [M20] and that operators needed to be “keep afloat for possibly years before international travel resumes” [M17]. The outlook was not mere doom and gloom for everybody, however. A few voices saw the lack of international travel options as an opportunity, anticipate a spike in domestic clients, as exemplified here:

“The current outlook looks promising and I believe our regional areas will receive a big influx of tourism as people cannot travel abroad and interstate for the time being. Long term with our movement into recession I believe limited financial ability to participate in leisure activities may occur … [if] this means more domestic and travel intrastate for the time being we may see slight short term growth!” [F8]

Numerous respondents saw the need to make Australians understand the value of the outdoors for mental and physical health (see also below) and anticipated that the COVID experiences would bring about an attitudinal shift. As one graduate, no longer working in the industry, opined:

“I think that there will be a boom, post COVID as people understand the benefits of the outdoors. ecotourism will have a unique opportunity to thrive as mass-tourism will be avoided due to the health risks (and the sub-par experiences) and as people continue to search for their own unique insta-moment” [M14]

Another respondent speculated that “perhaps riding on the recent sentiment change after the 2019 bushfires [opportunity existed] in getting domestic tourists involved in conservation tourism and citizen science programs’ [M15].

Others were far more sanguine, however, noting differences in the expectations of domestic and international markets: “a major challenge for ecotourism is peaking [sic] the interest of domestic tourists…. It is hard to inspire Australians to go on koala and kangaroo tours, and spend the money on higher end tour guides” [M15].

A lone voice perceived the anticipated spike in domestic tourism as a double-edged sword:

“I fear that there will be a boom in tourism immediately following the end of restrictions. … After the boom, there will be a slump, and
this will be a challenge. It will be important for staff to pace themselves, and look after their safety and not become complacent or burnt out” [F11]

3.3.5. Future staffing

A major concern, echoed by a wide range of respondents was the future of staff availability and profile. Noted was the concern that some staff may have lost some of their competencies due to a lack of practice as they were no longer “well-practiced to continue delivering programs safely (i.e. with regard to many technical skills like rigging an abseil which require maintenance to ensure safety)” [F9]. Most respondents observed the stress the lack of employment caused on fellow staff and feared an exodus of experienced staff leaving the industry in pursuit of more secure employment opportunities. As one former graduate who had left the industry after having lost his job as a ski instructor (working both in the northern and southern hemisphere) noted, once staff had left the industry they were unlikely to return:

“Loss of highly skilled staff who have been forced to move to other industries. It’s generally a passion for most as pay isn’t generally amazing in our sector. Once individuals move into more stable and financially sound work (assuming they can find such positions, which I believe many of the more experienced individuals will manage), I believe it will be more of a challenge for said individuals to exit those roles and return to outdoor recreation and tourism. Potentially leaving a vacuum of highly skilled, experienced staff” [M11].

This sentiment was echoed by others, who noted that “[a] big concern for us is finding staff again as a lot of workers have chosen to leave the industry in favour of more secure industries” [M6]. While for some the loss of staff was merely a business concern, others worried about the wealth of experience that was at risk of being drained from the industry. For them, the biggest challenge for the industry in the post-COVID world was to keep

“the people who have built the professional industry to what it is. So much knowledge is potentially about to be lost. The development of people in this industry cannot simply be paused or switched back on” [M5].

For others it was the depth of soft skills and experience that would be lost, as exemplified by this employer’s observations:

“I personally worry that the industry is about to experience a mass exit of mentors and trainers and that Australia is about to lose an entire generation of story tellers who have the capacity to connect Australians to nature and to its value” [M5].

4. Discussion

With its rapid spread and intensity, coupled with its truly global reach, the COVID-19 pandemic has proven to be a social and economic disruptor on a scale not seen since the influenza pandemic of 1918-19. Given the transmission pathways of COVID-19, primarily through aerosols and also via contaminated surfaces, public health measures included various modes of containment and social distancing. Containment strategies were full or partial lockdown (Goccia, 2020), as well as ring-fencing (Spennemann, 2021b) and other forms of geographical exclusion (Spennemann, 2021a; Whitshed, 2020) followed by staged easing of restrictions (Han et al., 2020). While usually of short-to-medium-term duration, these measures affected human movement for non-essential travel. At the time of the surveys (September 2020), the number of visitors to national parks and other open spaces in Australia was just returning to pre-COVID-19 levels (Ritchie, 2020). While the decrease in park visitations was not as severe as in some other countries (e.g. New Zealand, Chile, Argentina and Brazil all experienced reduction of park visits over 60% compared to baseline at times, while Australia’s maximum reduction was 40% in March 2020) (Ritchie, 2020), it is expected few of these visits would have been paid tours or activities.

The outdoor recreation industry is not the only industry to be severely impacted by COVID-19 but is arguably one of the most affected service industries as a niche tourism product that relies on specialised providers of group activities (e.g. school camps) as well as small-group, close-contact instruction activities (e.g. abseiling, parachuting, skiing). As the multiple responses document, COVID-19 affected the businesses in multiple ways.

By its nature, where activities take place in the open, the outdoor recreation industry is at first sight not impacted by social distancing requirements (in Australia, defined by the 1 person/4 m² rule). Yet, restrictions apply to vehicular transport, limiting the ability to take participants to a location for canoeing, climbing or abseiling, as well as to light aircraft, limiting the number of participants of parachute jumps (British Skydiving, 2020). While low ratios are theoretically possible, they are economically unviable as they require multiple trips with clients unwilling to pay disproportionately high per-person costs. Setting aside the need to continually disinfect shared gear, the requirement of 1.5 m interpersonal space for social distancing of non-family members precludes or limits close contact instruction and collaboration (British Skydiving, 2020). Travel restrictions were an added inhibitor, preventing operators from reaching their activity locations. Moreover, some activity locations, such as those in National Parks, were closed entirely, because Indigenous parks staff were deemed in the vulnerable category and agencies took precautionary blanket measures.

The critical question is to what extent the industry has been damaged by the COVID-19 pandemic. There is limited literature on recovery strategies, but that is primarily focussed on the general sector (Kaushal & Srivastava, 2021; Kreiner & Ram, 2020; Yeh, 2021). The outdoor recreation industry has developed a series of COVID-safe operations plans, which provide general advice on operations. In the Australian setting, examples for industry-wide plans exist for Queensland (Courteney, 2020a, 2020b) and Victoria (Victoria State Government, 2021), but not for New South Wales (NSW Government, 2021), Western Australia (Government of Western Australia, 2020, 2021) or South Australia (SA Government, 2021). On a more general level, the industry recovery is hampered by the unpredictability of the virus. Multiple waves and re-emergences of geographically dispersed clusters, followed by lockdowns, ring-fencing and travel restrictions impacted on the providers throwing business planning into disarray, as well as leading to cancellations from existing clients, and an unwillingness or inability for potential clients to commit.

If the outlook for the outdoor recreation industry in a post-COVID-19 world remains bleak, then not only will businesses and operators suffer, but it may also not be seen as a viable career option. As one respondent noted, “a lot of industry workers have realised how easily the industry can be impacted and that there isn’t a lot of job security as its generally a casual industry” [M6]. So even if the clients return, talented staff will have left the industry and new qualified staff may not be readily available, limiting the ability of the industry to provide a quality product, which then “looking at the food and restaurant industry [carries the risk that] a small about of bad press will probably ruin many small companies” [M8] who may already be financially challenged.

This loss of experienced staff may be compounded by shortages of future graduates due to the economic crisis that engulfed the Australian tertiary education sector during 2020 and early 2021. All universities reviewed their portfolios of degree offerings and, in order to cut costs, phased out a number of courses. In consequence, a large number of outdoor education and outdoor recreation courses were terminated. (Collins et al., 2020; Quay et al., 2020; Spennemann, Whitshed, & Hunt, 2020).

At the time of manuscript submission in January 2021 we posited that if no effective vaccine were to be available, or the uptake of
vaccination were to be limited and did not result in the anticipated, and required, herd immunity, then the future for the industry is probably worse than anticipated by respondents. By the time of manuscript revision in late July 2021 this scenario has come true. Australia’s vaccination rates lag well behind schedule due to vaccine availability (Borriello, Master, Pellegrini, & Rose, 2021; Nicholas & Evershed, 2021) and vaccination hesitancy (Biddle, Edwards, Gray, & Sollis, 2021; Edwards, Biddle, Gray, & Sollis, 2021). The implications of this go beyond the industry and may affect society as a whole. The outdoor recreation industry provides many benefits beyond just the economic benefits of tourism, including improved physical fitness, mental health benefits, connection with nature, learning new skills, and visiting otherwise inaccessible locations (Andre, Williams, Schwartz, & Bullard, 2017; Lackey et al., 2019; Mackenzie, Son, & Eitel, 2018; Thomsen, Powell, & Monz, 2019).

As a major disruptor, the COVID-19 pandemic provides an inflection point, allowing providers to reassert whether their pre-pandemic approaches can or should be modified. This extends well beyond practical and operational matters. Some voices have argued that the industry may need to revisit the traditional outcomes of outdoor adventure and experiential education programs, i.e. to move beyond the ‘standard’ variables of self-efficacy, resilience, and skill development that are the hallmark of intentionally designed experience. Ewert and Davidson (2021) posited that in addition to resilience training, post-pandemic programs should include components of stress reduction, and strategies to deal with uncertainty, anxiety and a sense of helplessness/hopelessness.

While the industry advocates the benefits of open spaces, these may not be embraced by the wider public. As one respondent cynically noted, the outdoor recreation industry is at risk by being a niche industry that may not be valued highly the wider public:

“This pandemic has shown that the Australian public is more outraged and places higher value on being able to go the pub rather than them and their families being able to experience, explore and educate itself on the value of the outdoors and the people who look after it” [M5].

The very real concerns of operators and staff will need to be addressed, or we, as a society, may lose many of these opportunities. Rebuilding and supporting the outdoor recreation industry is important to Australia as a whole.

5. Options ahead

While at the time of writing the impact of the pandemic is still immediate and its overall consequences are not yet clear, there is already wide-spread discussion on what a post-COVID world may look like, including studying (Neuwirth, Jović, & Mukherji, 2020), working (Kramer & Kramer, 2020), living (Spennemann, 2021a), urban open space planning (Honey-Roses et al., 2020) and commuting (Musselwhite, Avinieri, & Susilo, 2020), but also urban soundscapes (Spennemann & Parker, 2020) as well as office (Megahed & Kramer, 2020) and residential housing design (Spennemann, 2021c). The take-home message is clear: living with the stochastic occurrence of coronavirus epidemics, some of which may develop into pandemics, is the new reality, and we will have to adapt to it.

At the time of manuscript revision, Australia has experienced fewer than 35,000 total cases and 916 deaths (15 times less than global rates), with a first wave between March and April 2020, a second, larger wave between June and September 2020, and a third wave commencing in June 2021 (Gutiérrez, Clarke, & Kirk, 2021; Our World in Data, 2021). These low rates of infection and death, by global standards, were partly achieved through strong restrictions on movement and policies around hygiene and social distancing, and in that respect, the outdoor recreation industry in Australia may have suffered more than comparable industries in countries with higher infection rates, but fewer restrictions.

Intriguingly, despite the disruptive effect of COVID-19 on the industry, most of the respondents perceived COVID-19 as an aberration, with the majority seeing the industry eventually bouncing back. None of the respondents explicitly or implicitly considered that COVID-19 was only one, albeit the most severe event in the SARS-CoV (2004), MERS-CoV (2012), SADS-CoV (2016), SARS-CoV-2 (2019) trajectory. Epidemiologically, it is predictable that another zoonotic coronavirus will manifest itself in the foreseeable future (Feerl et al., 2020). Based on the range and tenor of responses reported here, it is must be of concern that the industry may not have—or at least does not express—the foresight to futureproof itself. In that regard, COVID-19 should serve as a painful, but salutary lesson.

Author contributions

Dirk H.R. Spennemann: Conceptualization, Methodology, Formal analysis, Investigation, Data Curation, Writing - Original Draft, Writing - Review & Editing, Visualization; Rachel Whitsed: Conceptualization, Methodology, Writing - Original Draft, Writing - Review & Editing.

Ethical clearance

The survey was approved by Charles Sturt University’s Ethics in Human Research Committee (protocol no H20274).

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