



Covid-19: Sector Impact Phase One Report



Like most sectors, sport and physical activity has been hit hard by the coronavirus outbreak. And with a workforce of over 500,000, CIMSPA is committed to supporting the sector in this real time of need.

In order to deliver the support that is needed, it is critical that we accurately understand the needs of the sector and this initial research has been instrumental in doing so. We would like to pay a special thank you to everyone who participated in the surveys and the many organisations who helped to share it.

With the continually changing landscape, we appreciate this is just the first step in a long journey and we ask that everyone in sport and physical activity continues to help us to understand their changing needs through our subsequent surveys. This will give us the confidence to know that the support we offer along with partners and supporters is relevant and needed.

Tara Dillon, CEO CIMSPA



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Introduction

Sector Surveys

Throughout March and April 2020, CIMSPA sent out 3 surveys to learn about the impact Covid-19 is having on our sector. The three surveys were aimed at:

Workforce

Understand the scale of the impact for everyone working within sport and physical activity and the opportunities arising from current working situations.

Training Providers

Understand the impact on the provision of training and the changes in accessibility and demand for the type of learning and development.

Employers

Understand the impact on small, medium and large employers across the sector and how different organisations are supporting their workforce.



Summary

Opportunities

General public will be **more engaged** with physical activity and wellbeing across multiple channels which may have previously taken some years to adopt.

Better understanding and experience of using **online / digital platforms** for a variety of professional uses, including communication, moderation, booking and business management.

A better prepared and unified sector which will have proven it's **invaluable role** within society by keeping the nation active and stable throughout Covid-19.

Considerations

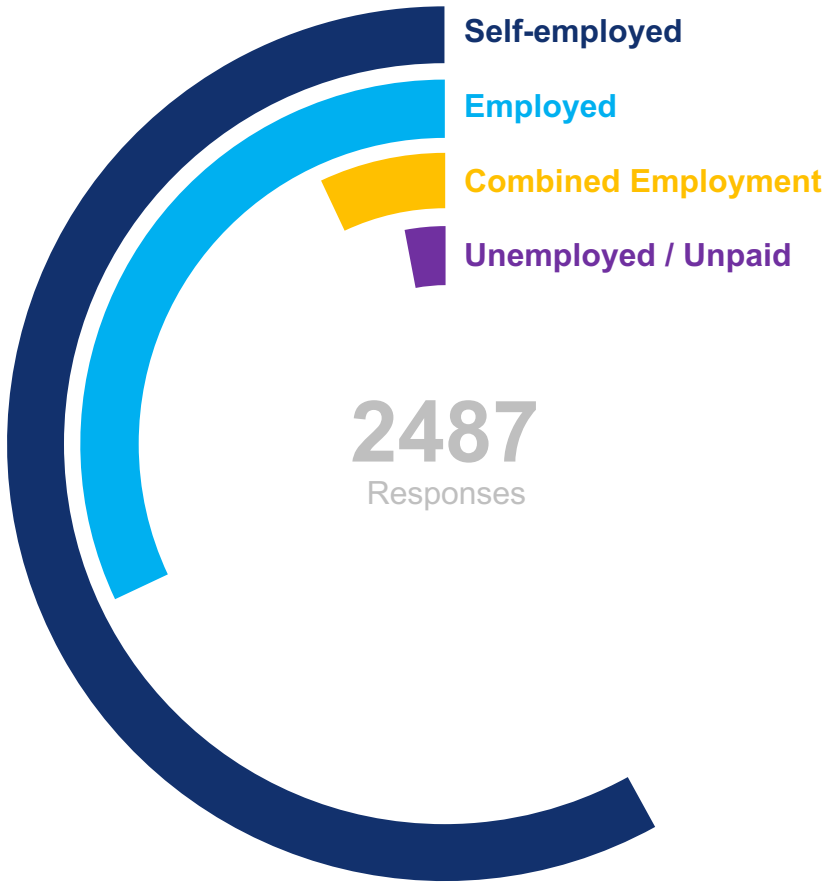
It will take some time for people to **readjust to physical communal settings** whilst facilities will be paying full overheads from day one of doors opening.

The adjustments which have been necessary to work through Government Guidelines will have a lasting affect on the **mental wellbeing** of professionals who will be expected to continue with work as soon as restrictions have been reduced or ended.



WORKFORCE

Survey Overview



58%

Self-employed

Those who are self-employed as a sole provider of services or through their own business.

32%

Employed

Direct employees of a business or organisation.

7%

Combined Employment

Those who have full or part time employment as well as working on a self-employed basis.

3%

Unemployed / Volunteer

Those who also volunteer their services, work in unpaid roles or are currently studying.

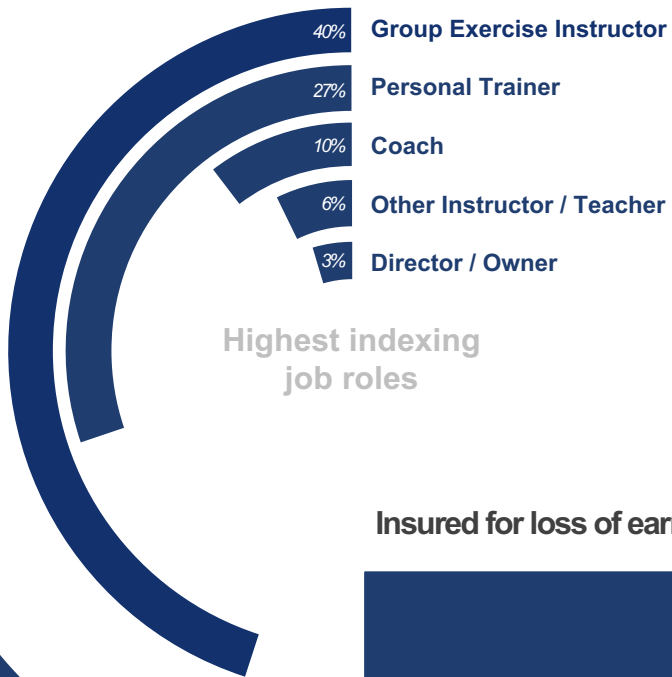


Self-employed Overview

58%

Self-employed

Those who are self-employed as a sole provider of services or through their own business.



Average annual business turnover before tax:

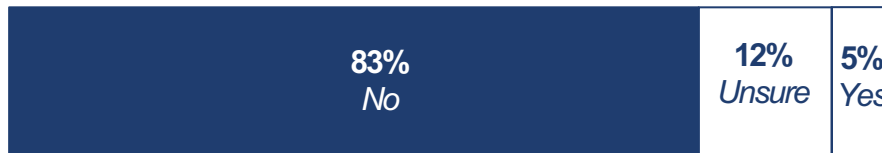
£50,000

Average financial losses accrued over 39 days since 1st March:

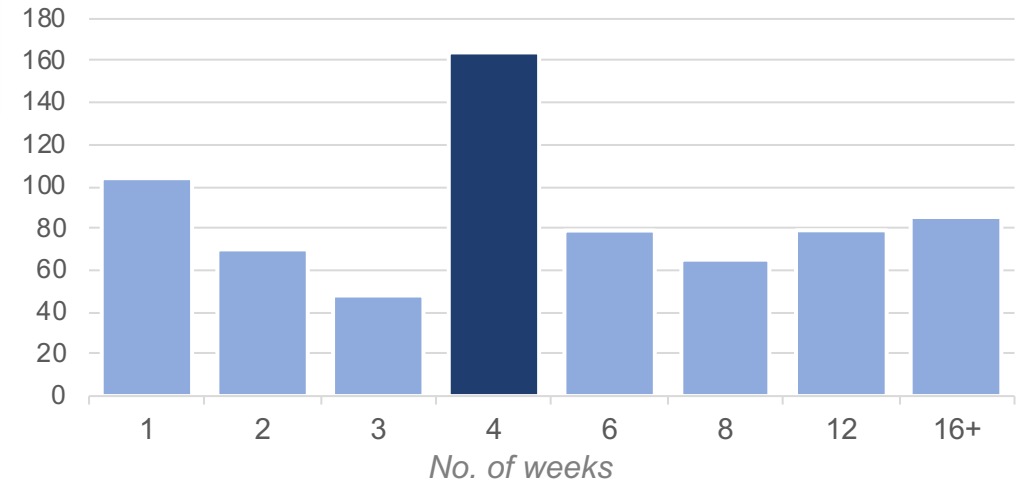
£9,000

Financial losses apply to 95% of those who are self-employed.

Insured for loss of earnings:

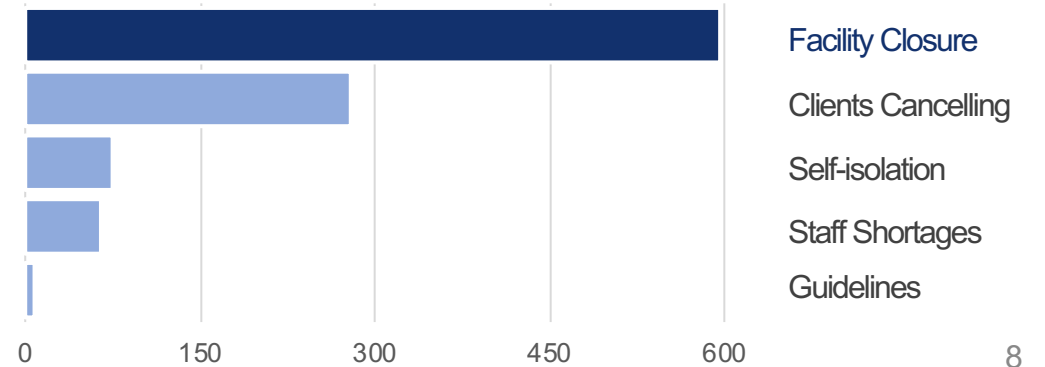


Number of weeks cash reserves will support business:



60% self-employed stated that they do not have any financial business reserves.

Main reason for income loss:



Employed Overview

32%

Employed

Direct employees of a business or organisation.



No. of clients / members / athletes served per week:

20%	15%	17%	48%
0-24	25-49	50-74	75-100

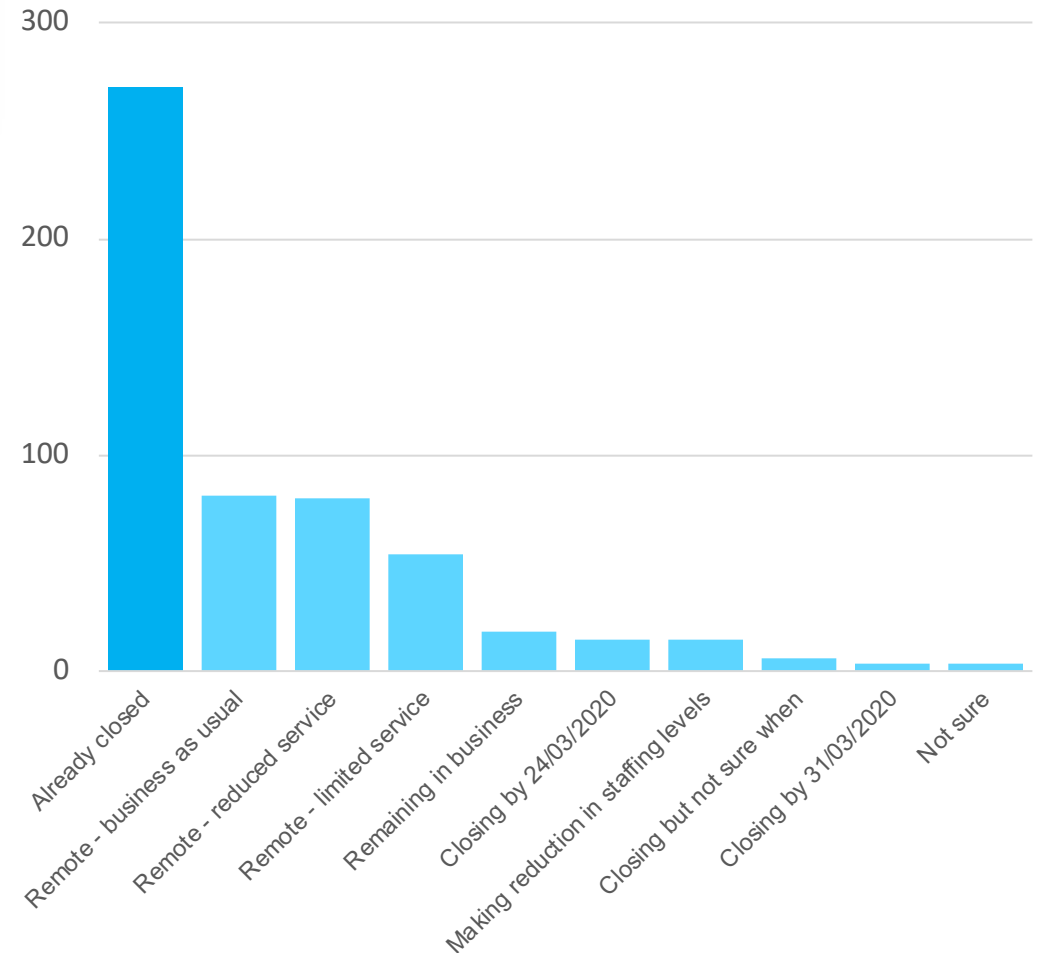
30% of responses stated that they serve 100+ per week.

Insured for loss of earnings:

60%	25%	15%
No	Unsure	Yes

Almost double the amount of the employed workforce are unsure of their loss of earnings insurance compared to self-employed.

Current business / organisation situation:



Combined Employment Overview

7%

Combined Employment

Those who have full or part time employment as well as working on a self-employed basis.



No. of clients / members / athletes served per week:

18%	18%	19%	45%
0-24	25-49	50-74	75-100

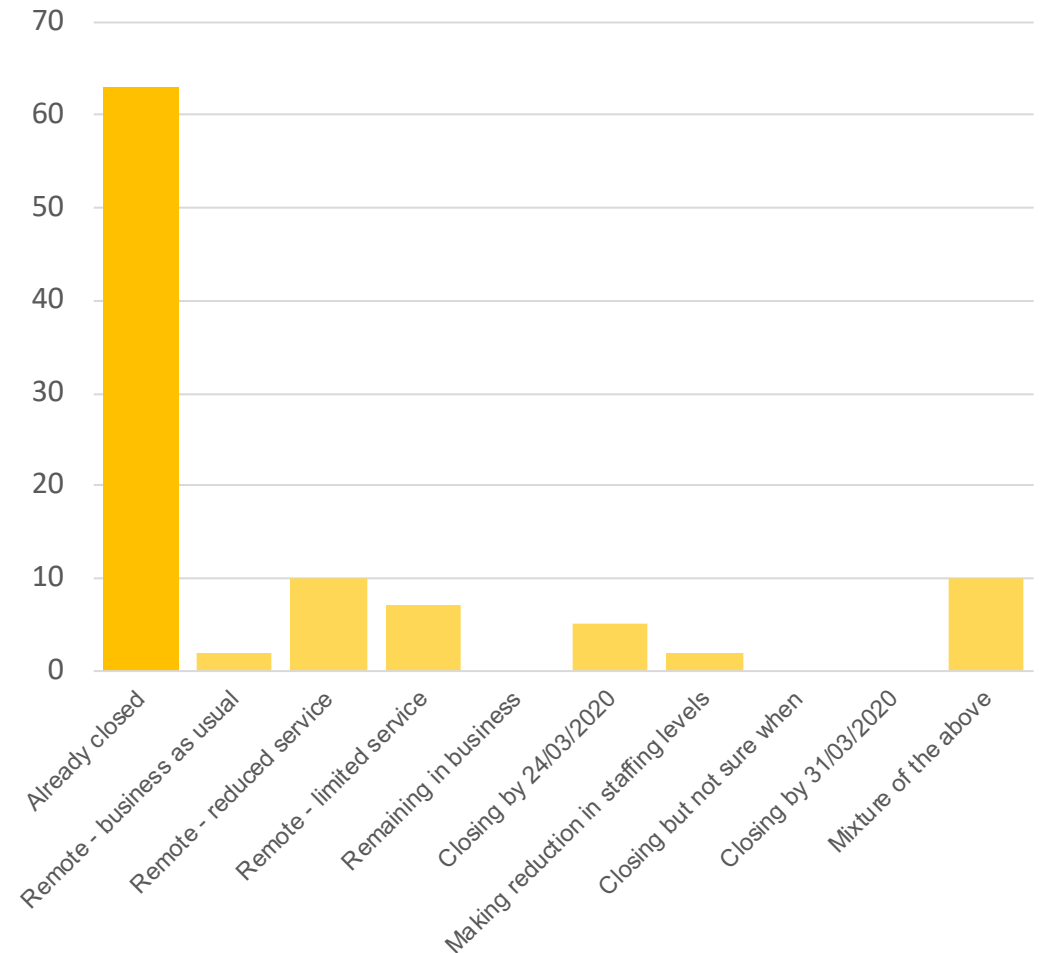
40% of responses stated that they serve 100 per week.

Insured for loss of earnings:

68%	27%	5%
No	Unsure	Yes

75% of those insured for loss of earnings hold a professional membership.

Current business / organisation situation:

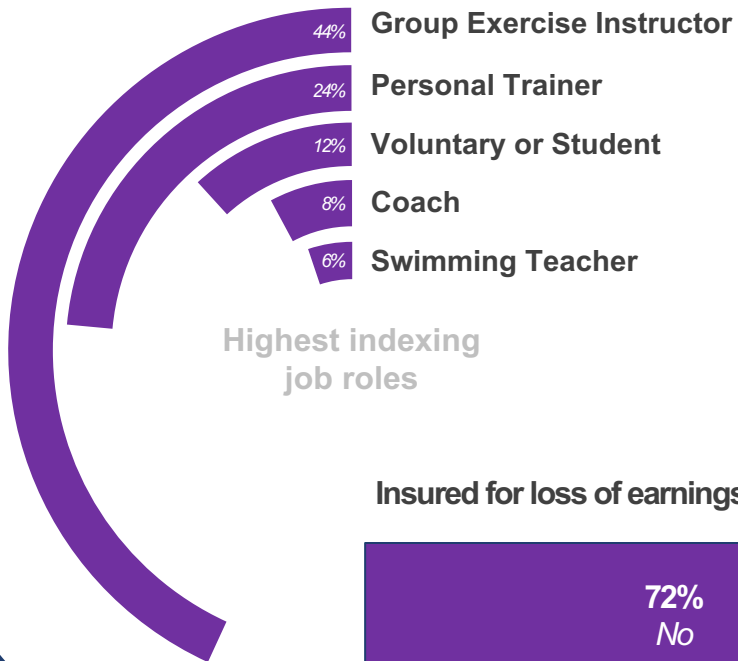


Unemployed / Volunteer Overview

3%

Unemployed / Volunteer

Those who also volunteer their services, work in unpaid roles or are currently studying.



Highest indexing job roles

Working directly with clients / members / athletes:

98%

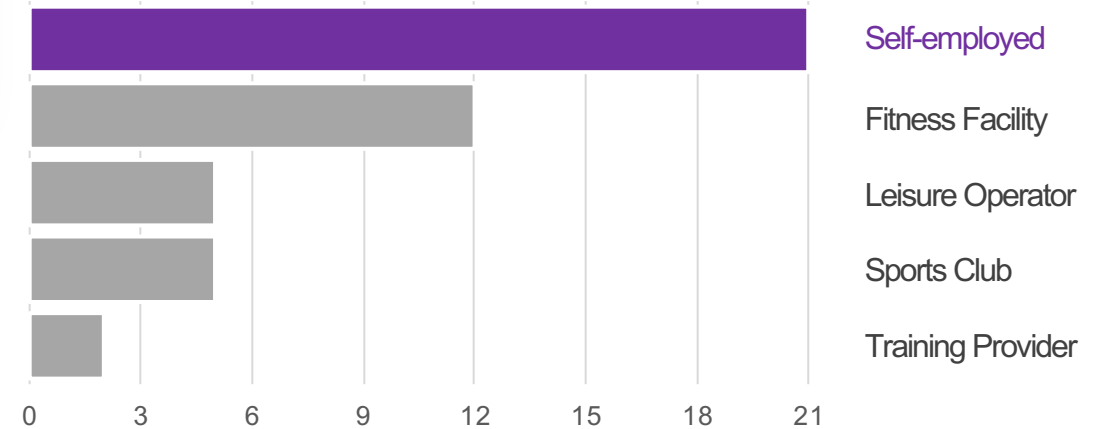
Almost all unemployed responses are from the front line.

Insured for loss of earnings:



Covid-19 may not have been included for those insured for loss of earnings.

Business or organisation previously working for:



No. of responses per answer

40% of those unemployed were previously self-employed.

In addition to financial support:

“Technical support, i.e. how to set up classes on line, receiving payment, working from home and knowing what is legal and what is not, PPL licencing, etc.”

Workforce Additional Support

In addition to any financial challenges you may currently face, what other support do you most require?

Mental wellbeing

“Mental health guidance – this is really hard for trainers as life has been turned upside down. Also financial guidance in terms of what exactly is available to support loss of earnings”

Remote sessions

“Guidance around the variety of platforms to host training, coaching and meetings.”

Advice and information

“Communication about what will happen next in the industry. how and when will return to normal.”

Continued training

“I can’t afford to pay for CPD courses as I have no income at the moment.”



Workforce Opportunities

If any, what opportunities do you see in the long term arising from the current situation?

Increase online capabilities and functions

“A greater use of tech to engage people in becoming more physically active.”

Influx into the sector

“In the long term there shall be an increased need to help and motivate the community to get fit and active, especially after much more time at home, being less active than usual.”

Shift in culture and landscape across the sector

“Reduction in the need to travel as IT has enabled other ways of holding meetings and "face to face" conversations - also training courses in groups can be facilitated online. Better for the planet and time efficient.”

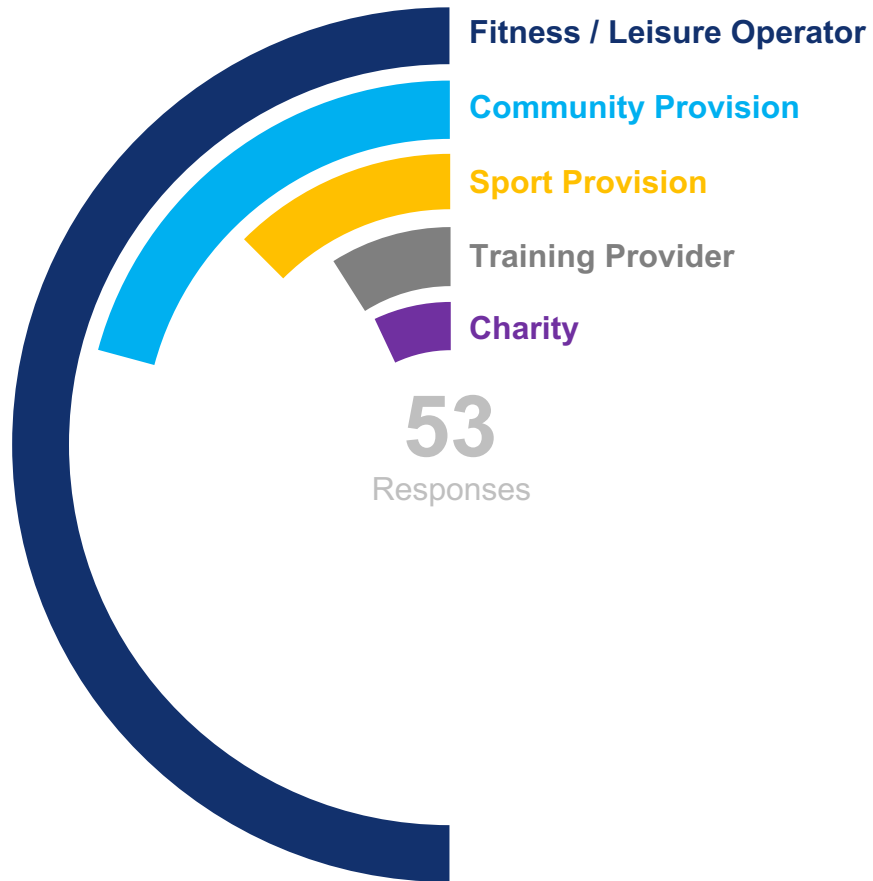
Time to plan and improve business / delivery

“I think this will have helped people adapt to more efficient ways of working remotely and may hopefully help people with a better work life balance in the long run.”



EMPLOYERS

Employer Overview



Fitness / Leisure Operator

This includes activity providers, self-employed, leisure operators and fitness facilities.

Community Provision

This includes school facilities and active partnerships.

Sport Provision

This includes sports clubs and national governing bodies.

Training Providers

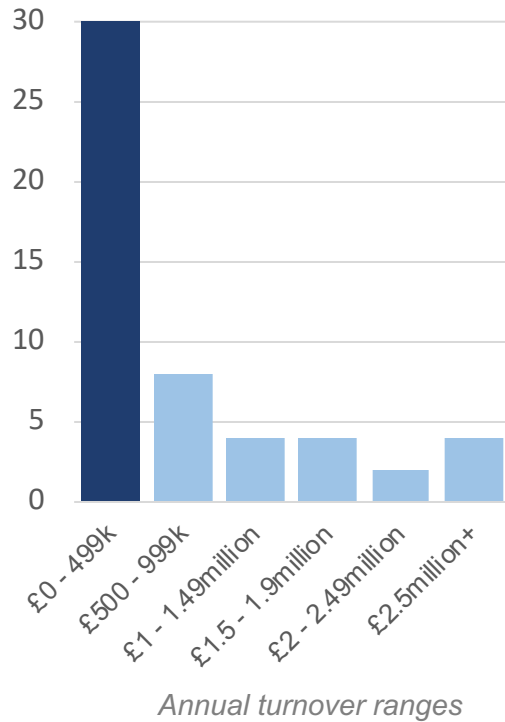
Charities



Employer Business Overview

Annual yearly turnover before tax:

£110,000

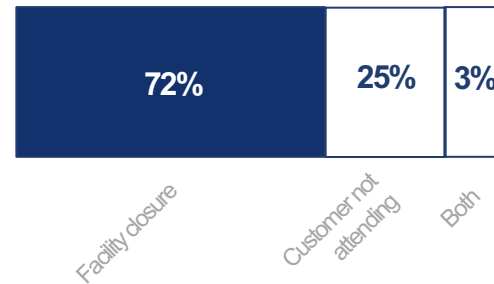


Average losses accrued over 39 days since March 1st:

£45,000

Over 10% have lost between £100k – 500k and a further 5% over £1 million.

Main reason for loss of income:

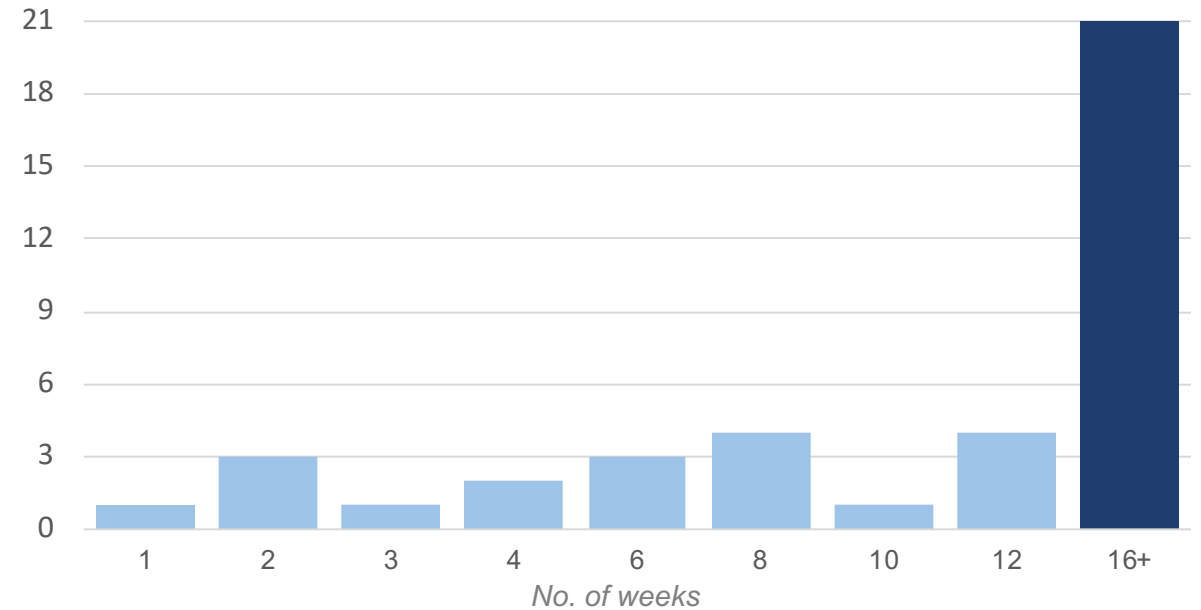


Average number of employees:

23

12% of responses are an employer of over 60 people.

Number of weeks financial reserves will support the business:



25% of responses would not be supported for more than one month in the current circumstances.

Financial business reserves:

35% No

Of those with no financial business reserves, 77% have facilities already closed.

Insurance covering loss of earnings:

92% No

Only 2% answered yes. Remaining were unsure.



Employer Additional Support

In addition to any financial challenges you may currently face, what other support do you most require?

Supporting staff and colleagues

“Government have supported with staff costs, but there is also other costs that we cannot avoid and have no way of making income especially with the work force in furlough.”

Regular updates and information

“It’s an unprecedented, ever changing situation therefore up to date information across the sector would be welcomed.”

Taking business online

“I think we are going to have to adapt the way we work to a more online service through partners and also have a more remote workforce.”

Finding provider support

“Flexibility from funding providers to be able to respond to local need and an extension of projects.”



Employer Opportunities

If any, what opportunities do you see in the long term arising from the current situation?

Boost in Sector

“... increased demand as a result of parents wanting an option having been with kids inside for weeks, and also due to financial constraints many will find themselves in as a result of the economic impact.”

Increase in Online Capabilities

“Uptake and a demand for more Digital solutions to be physically active. Ability for more people to work from home/offer meeting virtually.”

Restructure of Sector Landscape

“The heightened public and government awareness of the importance of physical activity and its essential role in society.”

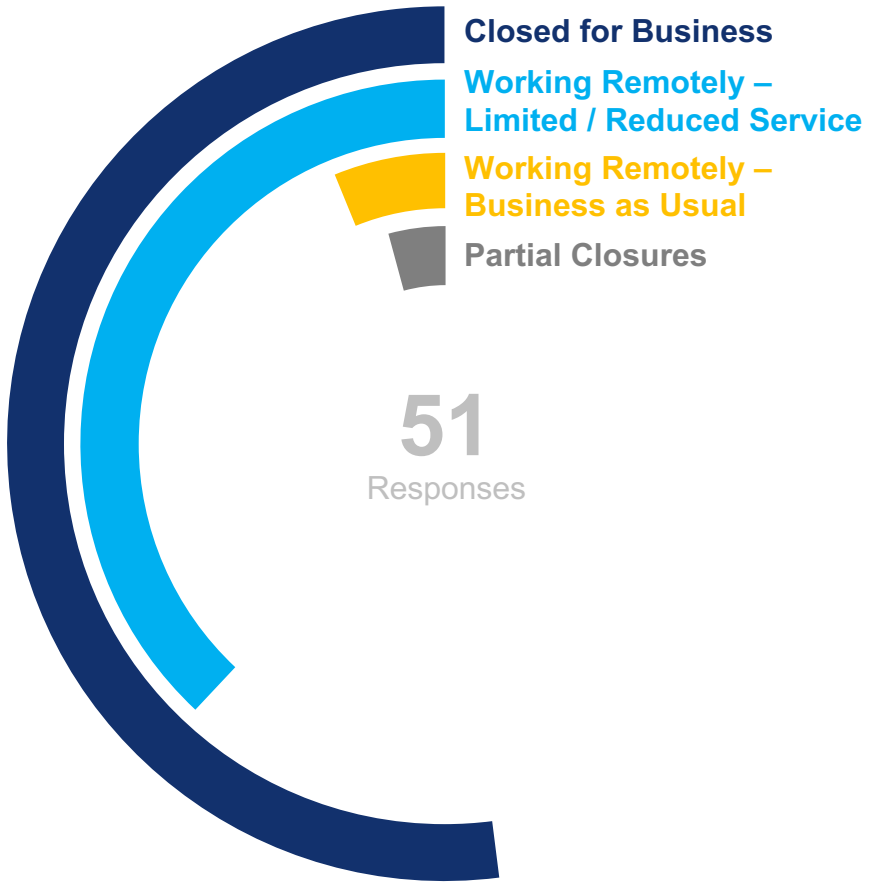
Solutions for Future Similar Situations

“Chance to write new programmes and deliver better quality work due to additional time now to plan for 2021.”



TRAINING PROVIDERS

Training Provider Overview



52%

Closed for Business

38%

Working Remotely – Limited / Reduced Service

6%

Working Remotely – Business as Usual

4%

Partial Closures

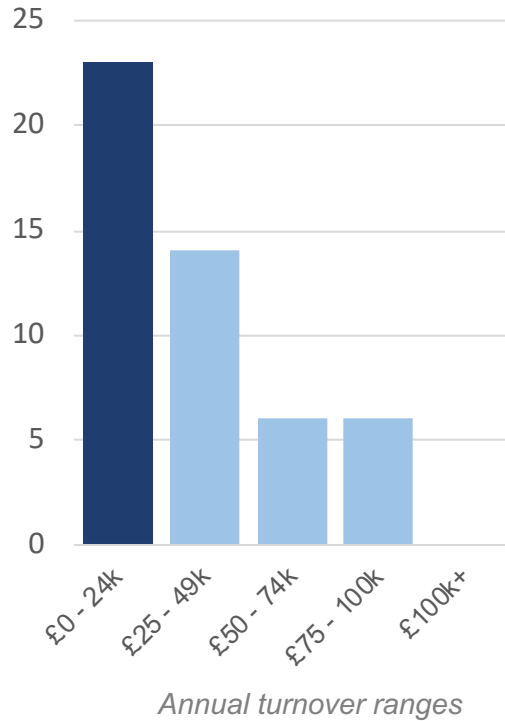
51
Responses



Training Provider Business Overview

Annual yearly turnover before tax:

£34,000

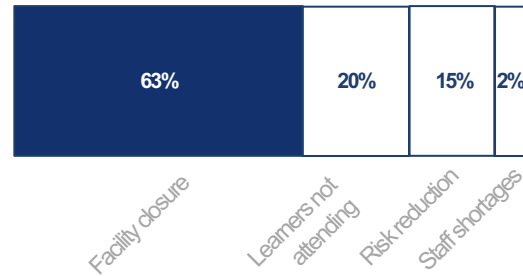


Average losses accrued over 34 days since March 1st:

£14,000

75% of losses over £50k do not have any financial reserves.

Main reason for loss of income:

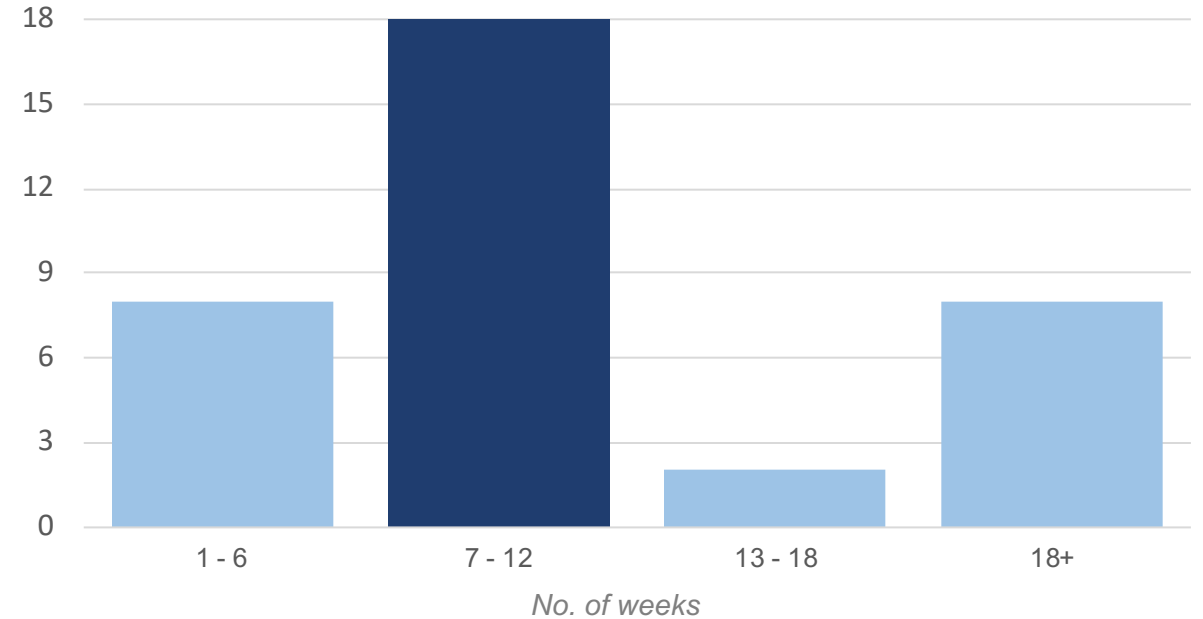


Average number of learners per year:

300

80% of training providers are expecting online delivery / tech solutions to further assist with training in the future.

Number of weeks financial reserves will support the business:



38% of providers stated they did not have any financial business reserves.

Average number of employees:

12

88% of those with 12 or more employees are not insured for loss of earnings.

Insurance covering loss of earnings:

92% No



Training Provider Additional Support

In addition to any financial challenges you may currently face, what other support do you most require?

Awarding Organisations Support

“Standardisation between awarding bodies and CIMSPA / REPs.”

Online CPD and Training

“Advice on what could be moved online and still meet regulated qualification requirements.”

Rebuilding Business

“How to continue business and a way forward.”

Support for SMEs

“Both my businesses are closed and there is no support for sole traders and small businesses, we are an after thought.”



Training Provider Opportunities

If any, what opportunities do you see in the long term arising from the current situation?

Increase in Online and Functions of Sector

“Remote support and efficiency regarding travel / meetings etc.”

Boost in Sector

“The more students that can use this time to become qualified the more expertise and skills will be available to help the general population with their health, fitness and lifestyle in the long run.”

Address Overlooked Business Activity

“We may find alternative solutions to conducting training which we might not have thought about before.”



RESOURCES

Resources

Workforce Support

Stronger Together CIMSPA
Supporter campaign – Via The Hub:

- Offers the sector workforce support through heavily discounted and free products/services to maintain some degree of continuity whether that is engagement, courses, planning for reopening etc.

www.cimspa.co.uk

(follow 'Stronger Together' link from link above)

Facebook Group

Stronger Together CIMSPA
Supporter campaign - Via the
Facebook Group:

- Offers a community in which these offers are present and those organisations putting the offers to the sector can offer knowledge share, expertise, advice, further services etc. to benefit the workforce as well as webinars, Q&A sessions to boost this community feel.

www.facebook.com/groups/cimspa.strongertogether/

Advice and Information

CIMSPA Hub offers advice and signposts to knowledge:

- For individuals: advice on financial and legal support, and resources for professional development, mental health and wellbeing.
- For businesses: information on Government and financial support.
- For the sector: updates on how CIMSPA is working with others including Sport England, UK Active, Community Leisure UK and DCMS to ensure the sector receives the support it needs.

www.cimspa.co.uk

(follow 'Stronger Together' link from link above)



