



# Covid-19: Sector Impact Phase Three Report: Recovery



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# Introduction

## Sector Surveys

Throughout October and November, CIMSPA concluded their research in understanding how the sector is recovering from the extended Covid-19 restrictions with this final survey building on the feedback from the previous two surveys for:

### 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

## Key Findings

Since reopening, 30% of workforce say the **income is not sustainable**. 40% say it is but only for a short period.

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**Only 4% of workforce** feel they haven't been able to gain the support from sector bodies throughout COVID-19. 24% slightly or completely unclear on government guidelines.

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The transition into digital delivery has been **most challenging for training providers** due to the guidelines around criteria for delivery and assessments.



**WORKFORCE**

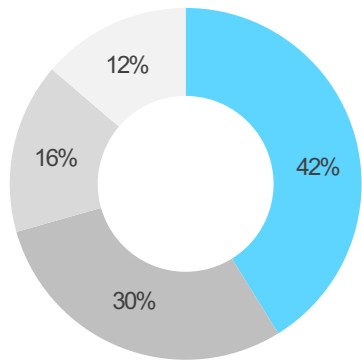
# Workforce

152 responses

68% self-employed, 30 % employed and 2% other

## Finance

75% of the workforce state that they expect their income to **decrease** when less restrictive measures are in place.



Future income is set to be:

- Sustainable for a short period
- Not sustainable
- Unsure
- Fully sustainable

**60%** state that they have used some, or all of their financial reserves.

On average, it will take the workforce **12 months** to recover to previous levels of income.

# 46%

able to work through or already back to work (mainly self-employed)

# 20%

have had to find alternative work to replace or supplement their current job

Only 12% of the workforce feel their future income is fully sustainable.

## Support

**“It's going to take a long time to generate the previous level of business. People are uncertain about returning to fitness facilities.”**

*Through ReTrain £1.5m is available, funded by Sport England, to retool the sector's workforce. A recent CIMSPA survey indicated up to 6% of the activity workforce are planning to leave the sector and ReTrain aims to combat this providing free training for new and existing staff enabling them to work in new areas.*

*Sport Wales have directly put out a funding pot for self-employed practitioners covering up to £1,500 for loss of earning.*



# Workforce

152 responses

68% self-employed, 30 % employed and 2% other

**“The UK government seem to have put gyms into the same box as pubs. We are fully safe and now being **forced to close again** even though our industry saves the NHS millions every year by keeping people active and healthy (in a newly *covid-secure way!*)”**

*The Sport and Physical Activity sector is currently recognised as part of the Arts, Entertainment and Recreation sector by government. This has lead to misinterpretation of the sector, especially through the pandemic where the underestimation of job loss figures saw an initial lack of funding for the sector. Sports and Physical Activity industries make up around 61% of the wider Arts, Entertainment and Recreation sector. CIMSPA is currently collecting feedback from the sector on a piece of work to better define the sport and physical activity workforce which will help with future understanding of our sector.*

## Return to Work

Guidelines which are confusing and difficult to access are making it harder for the workforce to restart business.

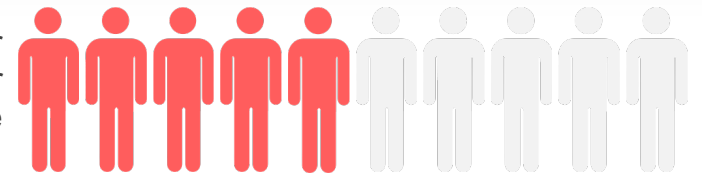
Unable to reopen to full service immediately 92%

Will require alternative work upon returning to their role 35%

**2x** more workforce are fully aware of sector guidance than government guidelines.

**“The support from CIMSPA with guidance on opening and access to guidelines is in a much clearer format.”**

51% of workforce rely on sector bodies (including CIMSPA) for information regarding a safe return to work..



# Workforce

152 responses

68% self-employed, 30 % employed and 2% other

## Perspective

Highest indexing responses for the topics stated:

Have adapted their product or service

77%

COVID has had a negative impact on the profession

45%

## Wellbeing

“Health and fitness **hasn’t been supported by the Government** unfortunately, especially keeping us closed through Nov lockdown.”

“ **Some clients are reluctant to come back to the class environment, but I also have new clients who now see fitness as **a new essential part of life,** and want to be fit to fight Covid.”**





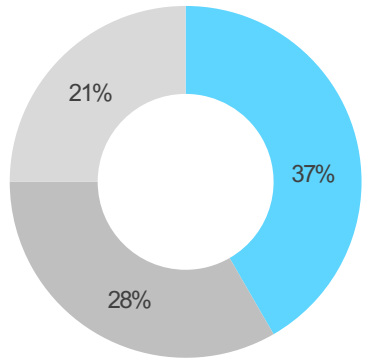
**TRAINING PROVIDER**

# Training Providers

14 responses

## Staffing & Finance

63% of training providers state that reopening under current measures will have a negative impact on their business.



Future income is set to be:

- Not sustainable
- Sustainable for a short period
- Fully sustainable
- Unsure (14%)

**86%** state that they have used some, or all of their financial reserves.

On average, it will take training providers **12 months** to recover to previous levels of income.

# 28%

have already had to make **redundancies**.

# 77%

agree that COVID-19 will greatly decrease their income.

On average, training providers currently employ between **10 – 20 staff**.

**“The industry has been hit hard which has a knock-on effect to our business. If the industry does not recover, we **may not survive the next 6 months.**”**

*CIMSPA currently has a number of campaigns aiming to support Sport and Physical Activity organisations*

*Reactivate: Free online training platform designed to equip anyone working or volunteering in the sector with the knowledge they need to confidently deliver activities*

*Stronger together:*

- Support for you; help and advice for individuals working in the sector to help you get through this period, including mental health support
- Support for your business; contributing to the resilience of businesses, small and large, within the sector
- Support for the sector; what we are doing, along with others, to ensure the sector gets the support it needs from the government and elsewhere

*Retrain: Free training for new and existing staff which will allow employers to continue providing valuable services to their local community*



# Training Providers 14 responses

## Staffing & Finance

63% of training providers state that reopening under current measures will have a negative impact on their business.

28%

have already had to make redundancies.

**“If I have to close, I'll be forced to work against guidelines or get into more and more debt. It's depressing.”**

86% state that they have used some, or all of their financial reserves.

On average, it will take training providers **12 months** to recover to previous levels of income.

On average, training providers currently employ between 10 – 20 staff.

## Return to Work

Limited understanding of Government guidelines and advice

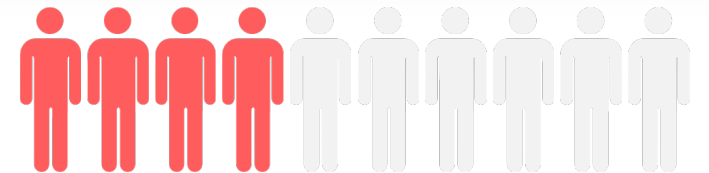
Unable to provide all of their training online **93%**

Not fully aware of procedures for safe reopening / practice **40%**

**50%** reduction of learners is expected.

**“We need to see demand from employers rather than individuals increase.”**

**40%** of training providers expect to use bounce back loans to assist with reopening.



# Training Providers

14 responses

## Wellbeing

### Perspective

Highest indexing responses for the topics stated:

Training providers feeling anxious / nervous to reopen business

77%

COVID has had a negative impact on the profession

68%

“Many of my learners are extremely **anxious about being in a group environment.**”

“The media portrays gyms as dirty.”

*The Sport and Physical Activity sector has conducted itself immensely throughout the pandemic and it's vital that we continue to do so and demonstrate this to shift the public perception.*



**EMPLOYER**

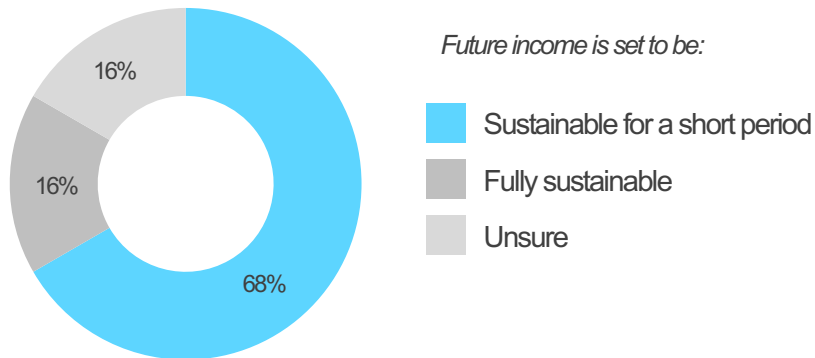
# Employer

6 responses

3 x fitness facilities, 2 x school facilities and 1 x leisure operator

## Staffing & Finance

84% of employers state that the current guidance measures regarding reopening have limited the revenue they can generate.



65% state that they have used all of their financial reserves.

On average, it will take employers **12 months** to recover to previous levels of income.

# 67%

have staff currently furloughed.

# 100%

agree that COVID-19 will continue to impose a **negative financial effect** on their business.

42% of employers expect to utilise **government loans or grants** upon reopening.

## Support

Financial support for businesses has been crucial but access has been difficult.

**“It’s difficult working out how to remain financially viable with **reduced class sizes**. We have a small fitness suite that can only host 6 people when socially distanced.”**

65% reported they would need further financial lending to support their business.



# Employer

6 responses

3 x fitness facilities, 2 x school facilities and 1 x leisure operator

*Although most facilities will be reopening, many will rely on further financial support to keep business which will implicate the level of future certainty many organisations have. More financial support is needed to assist facilities in enduring periods whereby restrictions limit service levels.*

*Have been training*

**“We have spent time training and **understanding their (employees’) concerns.** We have gotten them involved in writing action plans so they know what is happening and fully back it.”**

*40% reduction in members is unsustainable. More support is needed to restore public confidence in how facilities are working to ensure safe and secure environments.*

*Over three quarters of respondents stated they intend to return to clubs immediately, another 21% saying January/February and only 3% saying never with 69% of people saying they are ‘extremely confident’ after returning to their club post lockdown. The National Post Lockdown 2.0 Recovery Survey, Leisure-Net*

## Return to Work

Over half of employers will be using or relying on the job retention scheme upon reopening

Fully aware of procedures for safe return to work 84%

Will use job retention scheme 65%

Average number of employees = 12

**40%** reduction of members is expected.

Businesses are not currently able to confirm how they will make up for **lost income** in the future.

**65%** said that their employees appear to be **relaxed or excited** to return to work



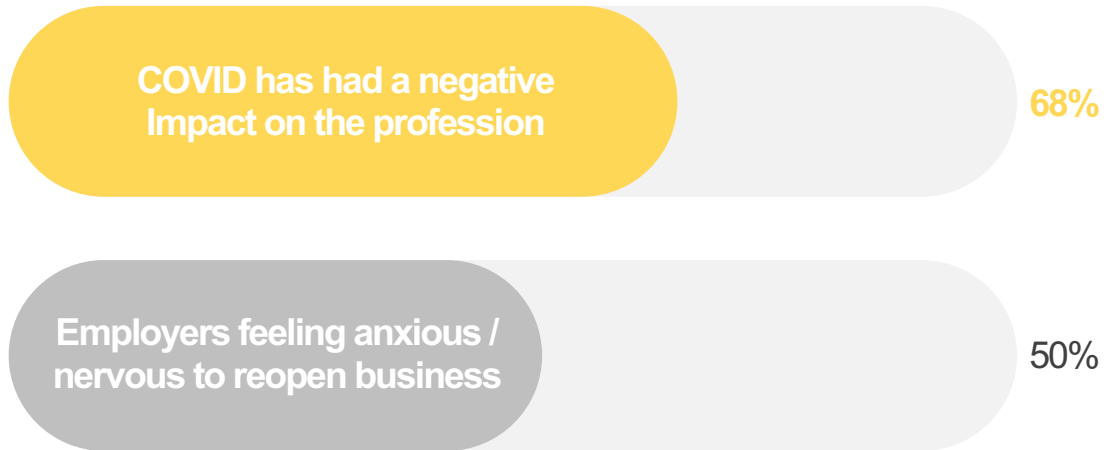
# Employer

6 responses

3 x fitness facilities, 2 x school facilities and 1 x leisure operator

## Perspective

Highest indexing responses for the topics stated:



“Most employees are worried about the rules and understanding why we have put things in place. The rules seem to change every few weeks and we are **struggling to put plans in place before they change again.**”





# RESOURCES

# References

## Workforce Support

Stronger Together CIMSPA

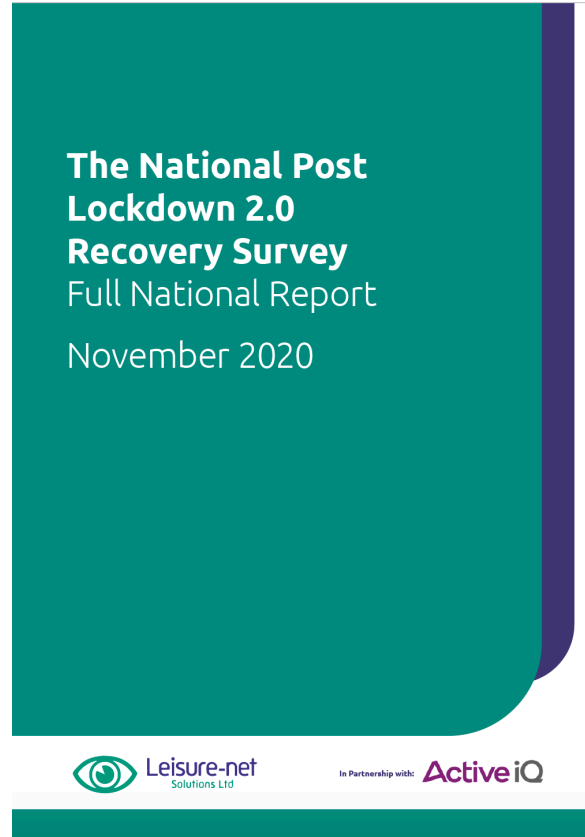
Supporter campaign – Via The Hub:

- 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](http://www.cimspa.co.uk)



## D. Monkhouse (Leisure-net)





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