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.

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.

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.
WORKFORCE
Survey Overview

- **Self-employed**: 58% - Those who are self-employed as a sole provider of services or through their own business.
- **Employed**: 32% - Direct employees of a business or organisation.
- **Combined Employment**: 7% - Those who have full or part time employment as well as working on a self-employed basis.
- **Unemployed / Volunteer**: 3% - Those who also volunteer their services, work in unpaid roles or are currently studying.

2487 Responses
Self-employed Overview

- Group Exercise Instructor
- Personal Trainer
- Coach
- Other Instructor/Teacher
- Director/Owner

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.

0% self-employed stated they do not have any financial business reserves.

Main reason for income loss:
- Clients Cancelling: 40%
- Self-isolation: 27%
- Facility Closure: 10%
- Staff Shortages: 6%
- Guidelines: 3%

Insurance for loss of earnings:
- Yes: 83%
- No: 12%
- Unsure: 5%

Highest indexing job roles:
- Director/Owner: 36%
- Other Instructor/Teacher: 26%
- Coach: 11%
- Personal Trainer: 7%
- Group Exercise Instructor: 7%

58% of self-employed through their own business.

Number of months cash reserves will support business:

- 0-4 weeks: 8%
- 5-8 weeks: 0%
- 9-12 weeks: 0%
- 13-16 weeks: 8%
- 17-20 weeks: 0%
- 21-24 weeks: 0%
- 25-30 weeks: 0%
- 31-35 weeks: 0%
- 36-40 weeks: 0%
- 41-45 weeks: 0%
- 46-50 weeks: 0%
- 51+ weeks: 0%

Financial losses apply to 99% of those who are self-employed.
Highest indexing job roles:

<table>
<thead>
<tr>
<th>Role</th>
<th>% of responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Trainer</td>
<td>48%</td>
</tr>
<tr>
<td>Director / Owner</td>
<td>15%</td>
</tr>
<tr>
<td>Group Exercise Instructor</td>
<td>15%</td>
</tr>
<tr>
<td>Manager</td>
<td>20%</td>
</tr>
<tr>
<td>Coach</td>
<td>7%</td>
</tr>
<tr>
<td>Manager</td>
<td>32%</td>
</tr>
</tbody>
</table>

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

- 100+ per week: 48%
- 75-100: 17%
- 50-74: 15%
- 25-49: 15%
- 0-24: 20%
- Unsure: 25%
- Yes: 15%
- No: 60%

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

Current business / organisation situation:

- Making reduction in staffing levels: 7%
- Remaining in business: 10%
- Closing but not sure when: 11%
- Closing by 31/03/2020: 9%
- Closing by 24/03/2020: 9%
- Remote - limited service: 10%
- Remote - reduced service: 10%
- Remote - business as usual: 19%
- Already closed: 32%

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

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

- 100+ per week: 48%
- 75-100: 17%
- 50-74: 15%
- 25-49: 15%
- 0-24: 20%
- Unsure: 25%
- Yes: 15%
- No: 60%

Direct employees of a business or organisation:

Employed: 32%

Employed Overview
Combined Employment Overview

- Group Exercise Instructor
- Coach
- Personal Trainer
- Health Practitioner
- Yoga or Pilates Instructor

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

49%
10% 8% 7% 6% 5% 4% 3% 2% 1% 0%

No

5% 18% 18% 75% of those insured for loss of earnings hold a professional membership.

Insured for loss of earnings:

- Yes
- No
- Unsure
- No

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

40% of responses stated that they serve:

100 per week:

- 75-100
- 50-74
- 25-49
- 0-24
- Mixed

Current business/organisation situation:

- Making reduction in staffing levels
- Making reduction in business
- Remote - limited service
- Remote - reduced service
- Remote - business as usual
- Already closed
- Closing by 24/03/2020
- Closing but not sure when
- Closing by 31/03/2020
- Mix of the above

45%
75%
19%
18%
18%
5%
27%
Unemployed / Volunteer Overview

In addition to financial support, those unemployed were previously self-employed. Nearly all unemployed were previously self-employed.

Almost all unemployed responses are from the front line: Working directly with clients / members / athletes:

- Swimming Teacher: 6%
- Sports Club: 12%
- Leisure Operator: 24%
- Fitness Facility: 31%
- Training Provider: 25%

Technical support, i.e. how to set up classes online, receiving payment, working from home and knowing what is legal and what is not, PPL licensing, etc.

Technical support:

- No. of responses per answer:
  - 0: 3%
  - 3: 6%
  - 6: 12%
  - 9: 24%
  - 12: 31%
  - 15: 25%
  - 18: 6%

Unemployed / Volunteer

Business or organisation previously working for:

- Those who are currently studying:
  - Unemployed / Volunteer: 3%
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."

Advice and information

"Communication about what will happen next in the industry."

Continued training

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

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

Workforce Additional Support
Workforce Opportunities

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 still 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

"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 facilitiated 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."

Current situation arising from the current situation?

If any, what opportunities do you see in the long term?
This includes activity providers, self-employed, leisure operators and fitness facilities.

**Fitness / Leisure Operator**

**Community Provision**

This includes school facilities and active partnerships.

**Sport Provision**

This includes sports clubs and national governing bodies.

**Training Providers**

This includes school facilities and active partnerships.

**Charities**

Responses

- Fitness / Leisure Operator: 50%
- Community Provision: 21%
- Sport Provision: 13%
- Training Providers: 9%
- Charities: 7%
Employer Business Overview

- 22% No insurance covering loss of earnings
- Average number of employees: 23
- 12% of responses are an employer of over 60 people.

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

Main reason for loss of income:
- 33% Financial business reserves
- 25% Customer not attending
- 12% Facility closure
- 6% Both

32% of responses would not be supported for more than one month in the current circumstances.

- 77% have facilities already closed
- 72% of responses have no financial business reserves
- Of those with no financial business reserves, 77% have facilities already closed.

Financial business reserves: 35%

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

Insurance covering loss of earnings: 92%

Over 60 days since March average losses accrued: £45,000

- 72% over £1 Million
- 33% £100k – £500k
- A further 5% over £1 million

Number of months financial reserves will support the business: 16+

£110,000

Annual turnover ranges:
- £0 - 499k
- £500 - 999k
- £1 - 1.49 million
- £1.5 - 1.9 million
- £2 - 2.49 million
- £2.5 million +

Average losses accrued: £45,000

Annual turnover before tax: £110,000
Employer Additional Support

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 workforce in furlough.

Finding Provider Support

Finding providers to be able to respond to local need and an extension of projects.

Flexibility from funding providers to be able to respond to local workforce.

Taking Business Online

Taking business online, information across the sector would be welcomed.

It’s an unprecedented, ever-changing situation, therefore up to date information and updates are especially with the workforce in furlough.

Regular Updates and Information

Regular updates and information especially with the workforce in furlough.

Supporting Staff and Colleagues

Government have supported with staff costs, but there is also other.

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

You most require?
Employer Opportunities

Boost in Sector

"Due to additional time now to plan for 2021." "Chance to write new programmes and deliver better quality work.

Solutions for Future Similar Situations

"Increased demand as a result of parents wanting an option having been with kids inside for weeks, and also due to financial 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 meetings virtually." "The heightened public and government awareness of the importance of physical activity and its essential role in society.

Restructure of Sector Landscape

"With a shift in mindset, many will find themselves in an economic impact phase, which means for example, having been with kids inside for weeks, and also due to financial impact. Increased demand as a result of parents wanting an option to increase their online capabilities."

If any, what opportunities do you see in the long term arising from the current situation?
TRAINING PROVIDERS
Training Provider Overview

Responses: 51

- 52% Closed for Business
- 38% Working Remotely - Business as Usual
- 6% Partial Closures
- 4% Working Remotely - Limited / Reduced Service

Responses: 51
Training Provider Business Overview

Annual turnover ranges:
- £0 - £24k
- £25 - £49k
- £50 - £74k
- £75 - £100k
- £100k+

Average losses accrued over 34 days since March 1st:
- £34,000

Average number of learners per year:
- 300

Insurance covering loss of earnings:
- 92% No

Facility closure:
- 12

Risk reduction:
- 0

Learners not attending:
- 3

Staff shortages:
- 6

Average number of employees:
- 12

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

83% of providers stated they did not have any financial business reserves.

63% have any financial reserves to support loss of income over 6-12 months.

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

70% of training providers are expecting online delivery / tech solutions to further assist with training in the future.

63%

20%

15%

2%

No. of months

Main reason for loss of income:
- 80% of training providers are expecting online delivery / tech solutions to further assist with training in the future.

Average number of months financial reserves will support the business:
- 38% of providers stated they did not have any financial business reserves.

No. of months

Average number of months financial reserves will support the business:
- 38% of providers stated they did not have any financial business reserves.
In addition to any financial challenges you may currently face, what other support do you most require? In addition to any financial challenges you may currently face, what other support do you most require?

Support for SMEs

Rebuilding Business

Online CPD and Training

Standardisation between awarding bodies and CIMSPA / REPs.

Awarding Organisations Support

Training Provider Additional Support

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

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

“Online CPD and Training”

Support for SMEs

“How to continue business and a way forward.”
If any, what opportunities do you see in the long term arising from the current situation?

Remote support and efficiency regarding travel / meetings etc.

Increase in online and functions of sector

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

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

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

"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."

"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

Boost in sector

"Remote support and efficiency regarding travel / meetings etc."
Receive support for the sector's needs – whether that is engagement, advice, knowledge sharing, expertise, courses, planning for reopening etc.

CIMSPA offers support:
- For government and financial support: information on Government and financial support, advice on financial and legal support, and resources
- For businesses: information on funding opportunities for businesses, advice and guidance on business planning
- For individuals: advice on mental health and wellbeing

CIMSPA Hub offers advice and information

Facebook Group
- Supporter campaign: Via the CIMSPA Stronger Together Campaign

Facebook Group
- Community feel: Q&A sessions to boost workforce engagement, further services etc., to offer knowledge and networking opportunities
- Offers a community in which organisations can share knowledge and expertise

Facebook Group
- Supporter campaign – Via the Hub: Stronger Together CIMSPA