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
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 its 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

2487 Responses

- **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.
Self-employed Overview

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

Average annual business turnover before tax: £50,000

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

- Self-employed as a sole provider of services or through their own business.

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

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

Main reason for income loss:

- Clients Cancelling: 40%
- Self-isolation: 27%
- Facility Closure: 10%
- Staff Shortages: 6%
- Guidelines: 3%

Average annual business turnover before tax: £50,000

Number of months cash reserves will support business:

Highest indexing job roles:

- Director / Owner: 60%
- Other Instructor / Teacher: 24%
- Group Exercise Instructor: 14%
- Coach: 5%

March: 69,000

Insured for loss of earnings: Yes 5% Unsure 12% No 83%
Almost double the amount of the employed workforce are unsure of their loss of earnings insurance compared to self-employed.

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

- Direct employees of a business or organisation:
  - 100+ per week:
    - 48% of responses stated that they serve
- Insured for loss of earnings:
  - 60% of employed workforce are unsure of their loss of earnings insurance compared to self-employed.

Highest indexing job roles:
- 32% Personal Trainer
- 20% Director / Owner
- 17% Group Exercise Instructor
- 15% Coach
- 10% Manager
- 9% General Manager
- 7% Male
- 6% Female

Employed Overview

Current business / organisation situation:
- Remaining in business: 11%
- Remote - business as usual: 9%
- Remote - reduced service: 7%
- Remote - limited service: 10%
- Closing by 24/03/2020: 25%
- Closing but not sure when: 9%
- Closing by 31/03/2020: 7%
- Not sure: 15%
Combined Employment Overview

- 7% of those insured for loss of earnings hold a professional membership.

- 75% of responses stated that they serve 100 clients per week.

- 49% of clients / members / athletes served per week.

- 75% hold a professional membership for loss of earnings.

- 27% are unsure.

- 5% are unsure.
Unemployed / Volunteer Overview

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.

In addition to financial support, most of those unemployed were previously self-employed. Some 98% of responses are from the front line, with almost all unemployed working directly with clients, members or athletes.

- Training Provider
- Sports Club
- Leisure Operator
- Fitness Facility
- Self-employed

Business or organisation previously working for:

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

Highest indexing job roles:

- Swimming Teacher
- Coach
- Volunteer or Student
- Personal Trainer
- Group Exercise Instructor

Insured for loss of earnings:

- Yes: 3%
- Unsure: 25%
- No: 72%

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

Financial support:

- Yes: 44%
- No: 24%
- Unsure: 12%
- Other: 8%
Workforce Additional Support

**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.”

**Financial challenges**

In addition to any financial challenges you may currently face,

what other support do you most require?

In addition to any
Workforce Opportunities

Increase online capabilities and functions

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

Influx into the sector

Shift in culture and landscape across the sector

Time to plan and improve business / delivery

Time efficient courses in groups can be facilitated online. Better for the planet and reducing in the need to travel as I can enable other ways of holding meetings and face-to-face conversations - also training.

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.

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

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**: 9%
- **Community Provision**: 21%
- **Sport Provision**: 13%
- **Training Providers**: 9%
- **Charities**: 7%

This includes activity providers, self-employed, leisure operators and fitness facilities.
This includes school facilities and active partnerships.
This includes sports clubs and national governing bodies.
This includes school facilities and active partnerships.
Employer Business Overview

Annual turnover before tax:

- £45,000
- £110,000
- £1.1 million
- £2 million
- £2.5 million

Average losses accrued over 39 days since March 1st:

- £10k
- £50k
- £100k
- £500k
- £1 million

Main reason for loss of income:

- 72%
- 25%
- 3%

Facility closure
Customer not attending
Both

Number of months financial reserves will support the business:

- 0
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10
- 12
- 18
- 21
- 25%
- 35%
- 77%

Financial business reserves:

- 35% No
- 77% No
- 25% No

Insurance covering loss of earnings:

- 92% No
- 2% No
- 2% Yes
- 7% Unsure

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

Number of weeks financial reserves would not be supported for more than one month in the current circumstances:

- 0
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10
- 12
- 16+

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

Over 12% of responses are from employers of over 60 people.

Average number of employees:

- 23
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

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

Finding provider support

Workforce:

"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."

Taking business online

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

Taking business online

Regular updates and information

"Especially with the workforce in furlough costs that we cannot avoid and have no way of making income. Government have supported with staff costs, but there is also other costs."

Supporting staff and colleagues

In addition to any financial challenges you may currently face, in addition to any financial challenges you most require?

you most require?
Employer Opportunities

Boost in Sector

Solutions for Future Similar Situations

Increased demand as a result of parents wanting an option

Chances to write new programmes and deliver better quality work

Increase in Online Capabilities

Uptake and demand for more Digital solutions to be physically active

Restructure of Sector Landscape

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

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

Average number of employees:
- 12

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

80% of learning providers are expecting online delivery, tech solutions to further assist with training.

63% of those with 12 or more employees are not insured for loss of earnings.

88% of providers are experiencing difficulties online delivery/tech solutions to further assist with training.

20% of training providers are expecting online delivery / tech solutions to further assist with training.

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

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

Facility closure
- Risk reduction
- Learners not attending
- Staff shortages

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

Average number of consultations per year:
- 75%

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

31'400

Average number of consultants per year:
- 300

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

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

Annual turnover ranges before tax:
- £0 - 24k
- £25 - 49k
- £50 - 74k
- £75 - 100k
- £100k+
Support for SMEs

"How to continue business and a way forward."

Rebuilding Business

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

Online CPD and Training

"Standardisation between awarding bodies and CIMSPA / REPs."

Awarding Organisations Support

Training Provider Additional Support

In addition to any financial challenges you may currently face, you most require... what other support do you most require? Both my businesses are closed and there is no support for sole traders and small businesses, we are an after thought. Both my businesses are closed and there is no support for sole traders and small businesses, we are an after thought.
Increase in Online and Functions of Sector

Remote support and efficiency regarding travel / meetings etc.

Boost in Sector

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

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

Address Overlooked Business Activity

“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.

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

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 including support for reopening etc.

www.cimspa.co.uk (follow ‘Stronger Together’ link from link above)

Workforce Support

Facebook Group

Supporter campaign - Via the Hub: Stronger Together CIMSPA

Facebook

This community feel, webinars, Q&A sessions to boost advice, further services etc: to knowledge share, expertise, offers to the sector can offer those organisations building the those offers are present and offers a community in which

CIMSPA Hub offers advice and support for government and financial government: information on mental health and wellbeing: for individuals: advice on financial and legal support, and resources

For businesses: information on professional development, and resources to knowledge: CIMSPA Hub offers advice and information

Advice and Information