



Covid-19: Sector Impact Phase Two Report



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Introduction

Sector Surveys

Throughout May, CIMSPA continued their research to understand how the sector is managing with the extended Covid-19 restrictions with 3 surveys building on the feedback from the first survey for:

Workforce

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

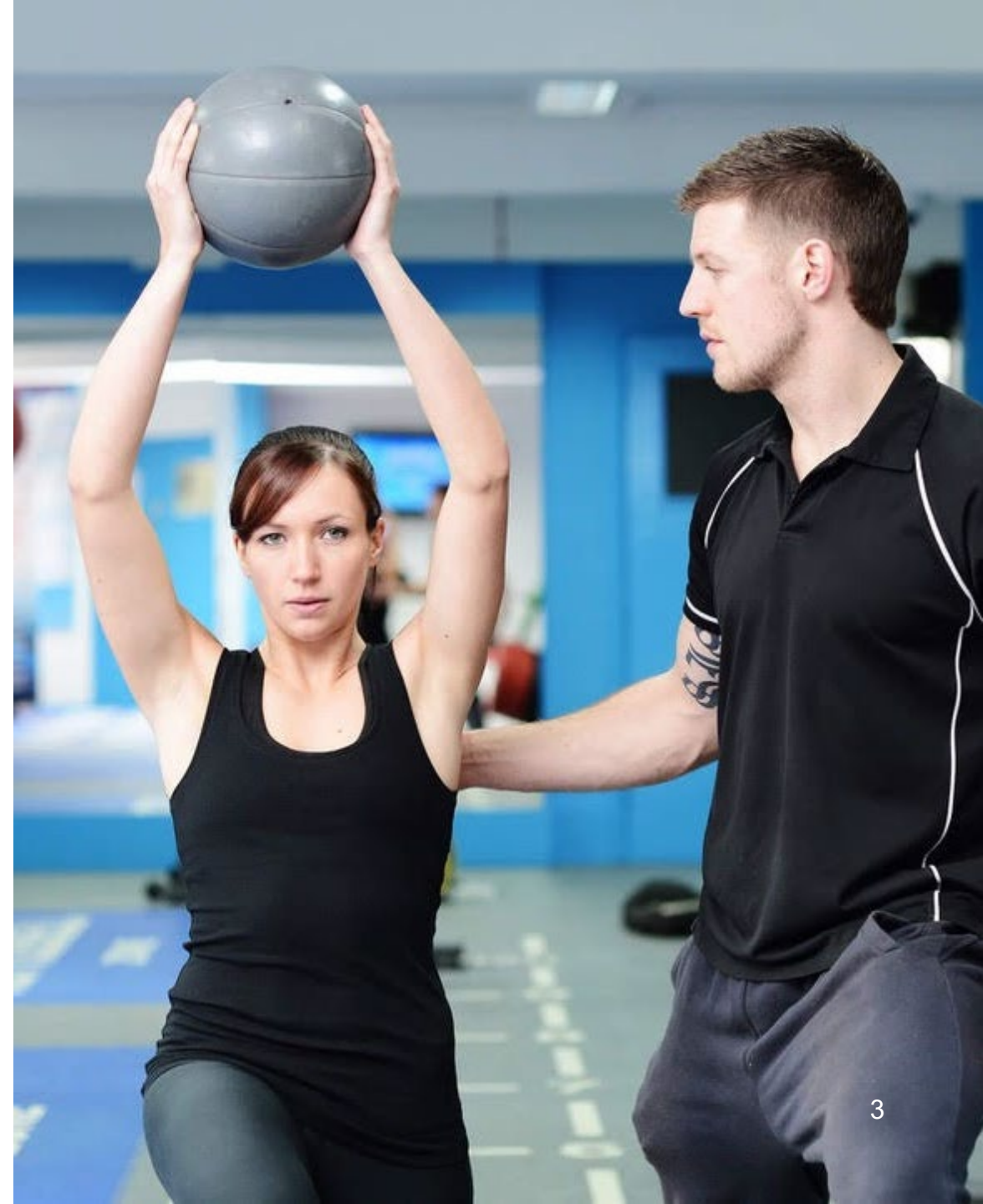
Training Providers

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.

Information from Sport England COMRES report has also been used to help further support our findings from the sector surveys. A link to the full report can be found on page 21.



Summary

Key Findings

Support which enables businesses to rebuild is the highest priority across all groups as facilities and businesses begin to prepare for reopening. Further study will look to understand exactly which aspects are most important to help businesses do this.

Sector updates were seen as the most valuable form of support that could have been offered **in the earliest phases** of Covid-19 restrictions.

Particularly within the Workforce, **mental wellbeing** is increasingly worsening with anxiety and frustrations regarding facilities reopening and future restrictions that may affect their service.



In response to Covid-19 CIMSPA created the Stronger Together Hub supporting individuals, organisations and the wider sport and physical activity sector with advice practical assistance and generous offers of support from partners.

cimspa.co.uk/library-and-guidance/coronavirus---cimspa-briefings

In response to Covid-19 CIMSPA created the Stronger Together Hub supporting individuals, organisations and the wider sport and physical activity sector with advice practical assistance and generous offers of support from partners.



WORKFORCE

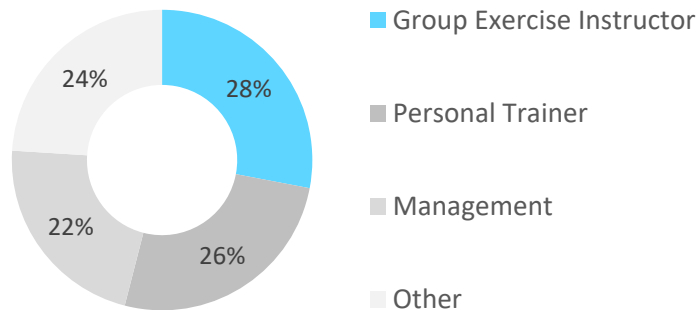
Workforce

338 responses

50% self-employed, 40% employed and 10% both.

Business Finance

The sector's largest financial losses have been reported in the front line Workforce segment. In this case being represented by the following:



Of the **70%** who have financial reserves, on average, these will support their business for **3 months**.

Average financial losses:

£14k

75%

have lost income due to **facility closure**, predominantly from the beginning of **March**.

Moving business **online** is the largest contributor for gaining income throughout Covid-19 restrictions.

“Optimistic but also worried at the same time, **not knowing** if my job will be secure in the future.”

Using Furlough or self-employed income support

35%

CIMSPA created a policy and guidance for delivering sports and physical activity online to respond to the shift toward more online delivery methods.

Need for better financial education. CIMSPA intends to work with leading financial organisations to bring this to the sector.

with only **12%** having access to this type of support.

“Motivated to be more creative and **test ideas online** that I would need to pay rental for pre Covid-19”



Workforce

338 responses

50% self-employed, 40% employed and 10% both.

“... frustrated at **lack of information** specific to community teaching outside privately owned studios.”

CIMSPA intend to work with Sport England to increase available support.

Many members of our workforce were not eligible as 55% of the front line workforce are freelancers and may not have the financial records required or pay themselves by dividends.

“Facebook discussion groups providing links to information from CIMSPA, EMD, UKactive etc. Also **updates** direct from employer.”

Support

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

Unsure or no applicable support

40%

Using Furlough or Self-employed Income Support

60%

45% need support **rebuilding their business**, with only **12%** having access to this type of support

1 in 10 people require help accessing government support.



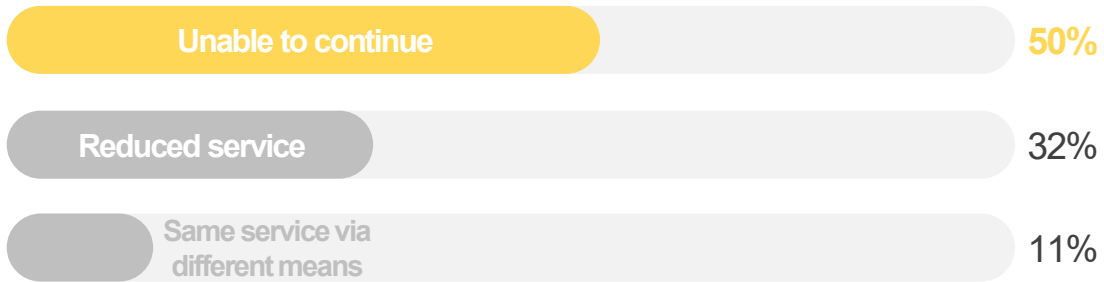
Workforce

338 responses

50% self-employed, 40% employed and 10% both.

Service

Highest indexing responses for the levels of service still being offered:



On average, **75%** of members / clients have stopped using physical activity services.



“The longer I’m not able to access my client, the **less confident** I am that they’ll come back once I can resume trading!”

A demonstration of the versatility in the workforce in being able to continue operating at the same level.

“Not very motivated, stressed, in need of **support from the facility** who help provide my service.”



Workforce

338 responses

50% self-employed, 40% employed and 10% both.

“Loved elements of being able to **slow down, take stock and think**. Then when panic kicks in the **depression is challenging**.”

CIMSPA recognise the enormity of some of the mental wellbeing challenges presented by Covid-19 and will continue to work with partners such as MIND to bring further support to the sector.

Attitudes around motivation have improved through May with increase in people agreeing they have the ability and opportunity to be active; 67% agree they now have more time to be physically active, with 62% agreeing that they exercise to manage mental health throughout COVID-19 (1-4th May, COVID-19 Briefing, Sport England)

Wellbeing

An overview of the wellbeing of the workforce including nutritional, physical and psychological changes since Covid-19 restrictions:

Eating less healthily

31%

Low motivation reported as the main reason for this.

Less physically active

46%

Changes to daily schedule and restricted access to facilities / equipment reported as the main reason for this.

Benefit from further support regarding mental wellbeing

26%

Future

Although the current restrictions have been hugely damaging for the sector, the knowledge and time to organise throughout will prove helpful when facilities reopen.

“It can be difficult to find motivation when I’m stressed but I’m confident that once facilities reopen I’ll be prepared to start business again more dynamically.”



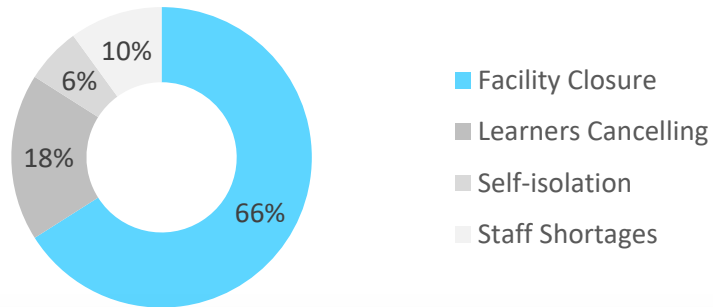
TRAINING PROVIDER

Training Provid

27 responses

Business Finance

Three quarters of Training Providers are experiencing a negative financial impact with the reasons for this reported as:



Of the **65%** who have financial reserves, on average, these will support their business for **3 months**.

35% do not have any financial reserves.

77% have been **negatively impacted, financially, since 1st March**.

Average financial losses:

£130k

54% have had to **furlough staff**.

Of those able to make a positive income throughout averaged **£55k since 1st March**. Reasons reported for this increase were from **Government grants, online fitness training and international clients**.

Many of the workforce have been using lockdown as an opportunity for professional development.

Further highlighting the need for better financial education and support in the sector. Working with Sport England to identify financial and further support for niche training providers such as those delivering specialist population training.

Training Provider

27 responses

1 in 10 Training Providers reported that they needed assistance accessing government support which was applicable to their business.



Highlighting the need for the support and resources available on the Stronger Together Hub.

Highlighting different need states at points in time. An opportunity to better engage training providers with the Hub.

“Ability to **upskill staff** through on-line CPD ready for reopening”

Support

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

Unsure or no applicable support

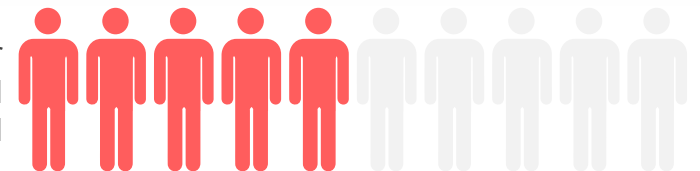
37%

Have not been able to access the (non-financial) support they require

58%

38% need support **rebuilding their business**, with **28%** stating **sector updates** would have been most helpful at the beginning of the pandemic.

50% reported they felt their working situation would return to normal

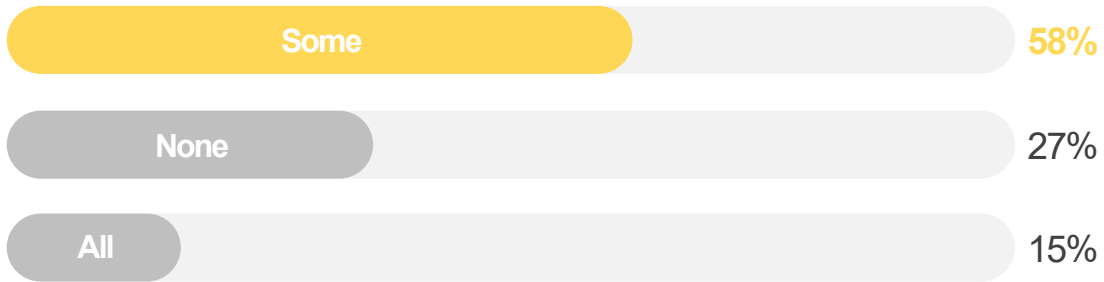


Training Provider

27 responses

Service

Responses to the level of training that is now accessible online:



On average, **50%** of learners have stopped accessing training.



No Training Providers reported that they are currently able to deliver a normal service.

“Currently not being able to deliver **practical assessments** is our main issue. The longer the gyms are shut the harder it will be to get new students signed up.”

“There is an opportunity to offer more qualifications online, but we are limited due to **lack of online resources** produced by AO. As a small training provider, we don't have the resources or time to invest in producing our own.”

Lockdown restrictions prevented learners from attending face-to-face training and also restricted assessment options that training providers previously had.

Training Provider

27 responses

Around **63%** of Training Providers felt that learners would benefit from further support regarding their mental wellbeing.

Around 21% of people participate in home activity fitness online with 34% agreeing they take part in more physical activity during COVID-19 than they usually would (8th-11th May, COVID-19 Briefing, Sport England).

“Going online has given us a wider reach.”

Wellbeing

Feedback regarding the perceived interest for wellbeing improvements to training:

Both lifestyle and mental wellbeing

68%

Not increased training for either of these topics

58%

Future

An optimistic outlook for the future overall. Particular opportunities such as international exposure, intense group tutoring and ability to upskill reported as helping this.

“Increased enquiry levels from individuals and a willingness by some corporate organisations to discuss opportunities post Covid-19 restrictions.”



EMPLOYER

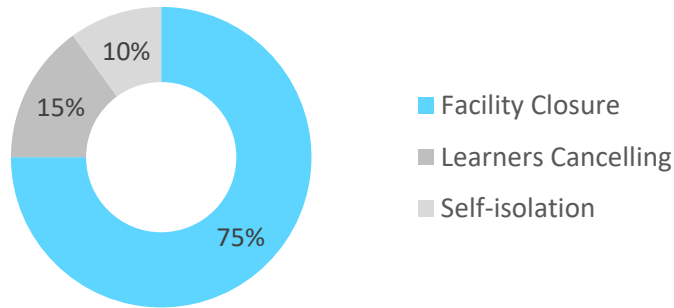
Employer

41

30% leisure operators, 21% fitness facility, 10% school facility and 29% other.

Business Finance

90% of Employers are experiencing a negative financial impact with the reasons for this being reported as:



90% have been **negatively impacted, financially, since 1st March.**

Average financial losses:

£300k

45% of employers currently paying rent. **15%** of those are receiving **pressure** regarding rental payments.

Of the **85%** who have financial reserves, on average, these will support their business for **4 months**. **15%** do not have any financial reserves.

Rate relief and business grants were reported as the most common reason for businesses making any sort of gained income throughout Covid-19 restrictions and guidelines.

Lobbying work done by CIMSPA and the sector may have contributed to 85% of employers not receiving pressure from landlords.



Employer

41

30% leisure operators, 21% fitness facility, 10% school facility and 29% other.

CIMSPA want to further support those who have not been able to access financial support and those that require help rebuilding their business with supplier partners of the Stronger Together Hub.

“Opportunity to focus on some areas of business e.g. software development and training, research and exploring new ways of business. However, **unable to implement** due to needing to furlough staff to ensure business continuity and viability.”

CIMSPA intending to work with leading financial organisations to better support the needs of employers.

Support

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

Using Furlough for staff

70%

Average number of employees = 115.

Have not been able to access the (non-financial) support they require

58%

42% need support rebuilding their business, with a further **30%** stating that sector updates would also be beneficial.

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



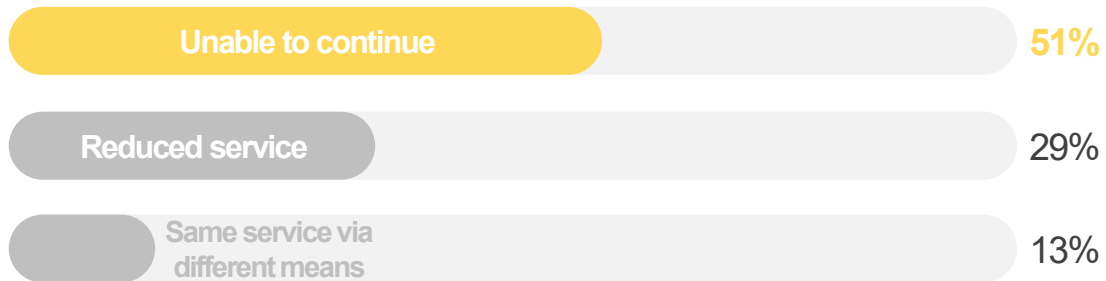
Employer

41 responses

30% leisure operators, 21% fitness facility, 10% school facility and 29% other.

Service

Highest indexing responses for the levels of service still being offered:



Average number of members / clients (pre-Covid):

16,000



On average, 75% of members / clients have stopped using physical activity services.

“With improved use of technology we can **communicate better with each other and customers**; even more flexible working arrangements; time to reflect, re-assess and look to deliver certain activities in different ways.”

43% of people agree that current situations have not impacted their current exercise regime (8th-11th May, COVID-19 Briefing, Sport England), showing versatility to continue participating in Sport and Physical activity as normal through the COVIS-19 outbreak.

Employer

41

30% leisure operators, 21% fitness facility, 10% school facility and 29% other.

“Frontline workers who are used to working **face to face** might be struggling with their motivation.”

CIMSPA recognise the enormity of some of the mental wellbeing challenges presented by Covid-19 and will continue to work with partners such as MIND to bring further support to the sector.

“The profile of health and fitness is much improved... can we embrace the digital world better and **use technology to its full potential!**”

Wellbeing

Feedback regarding the perceived interest for wellbeing improvements to training:

Already using mental wellbeing support for employees **70%**

Would benefit from further guidance regarding mental wellbeing **58%**

Future

An optimistic outlook for the future overall. Particular opportunities such as international exposure, intense group tutoring and ability to upskill reported as helping this.

“Creation of **digital / online** exercise classes, Zoom virtual meetings and home working expanded.”



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.

cimspa.co.uk > [Stronger Together](#) > [CIMSPA Supporter directory](#)

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.

[CIMSPA | Stronger Together](#)

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, ukactive, Community Leisure UK and DCMS to ensure the sector receives the support it needs.

cimspa.co.uk > [Stronger Together](#)



