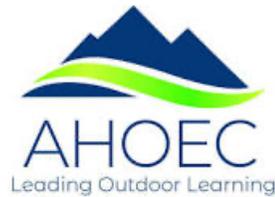




Institute for **Outdoor Learning**



**BRITISH ACTIVITY
PROVIDERS ASSOCIATION**



FSA
FOREST SCHOOL
ASSOCIATION

OUTDOOR LEARNING COVID-19 IMPACT SURVEYS FOR ORGANISATIONS & OUTDOOR PROFESSIONALS

SECTOR REPORT 12 MAY 2020

OUTDOOR LEARNING COVID-19 IMPACT SURVEYS SECTOR REPORT

The impact of COVID-19 is being felt across all areas of Outdoor Learning.

After a period of significant and necessary change, now is the time for taking stock of the impact of the current situation on Organisations and Professionals involved in Outdoor Learning. It is critical we take account of the immediate and enduring effects for a sector that supports the education, health and wellbeing of all ages and all communities of UK society.

The initial COVID-19 Impact Surveys have pulled together data about the immediate impact of Coronavirus, implications for the longer-term and anticipated sector needs for the future. We have summarised the 237 responses to the Organisational Impact Survey and 393 responses for the Impact Survey for Outdoor Professionals in this report.

The results of the surveys are critical for the Outdoor Sector so we can better serve our members and represent the impact and concerns of the sector to government departments DCMS, DfE, DEFRA.



BRITISH ACTIVITY
PROVIDERS ASSOCIATION



EXECUTIVE SUMMARY

PROTECT THE VALUE OF OUTDOOR LEARNING. PROTECT THE SECTOR. PROTECT THE WORKFORCE.

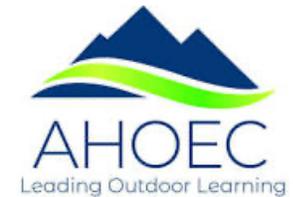
The sector has been in shutdown during its two busiest trading quarters with little opportunity to make up lost revenue estimated at £275M until mid 2021. Many organisations expect to close and many more may not recover in time. Continuing financial support is essential to keep the sector alive.

At peak periods, each day over 70,000 under 18s and 20,000 over 18s have been missing out on valuable outdoor learning experiences that support their education, mental health and active lifestyles.

Outdoor learning professionals can provide solutions for a return to school with social distancing and provision of outdoor education, exercise and wellbeing.

The sector is well placed to provide guidance and practical support of responsible access to countryside, coast and national parks in a COVID-19 aware society.

A strong lead and coordinated guidance from across departments is essential to protect resources, residential provision and group working and allow the sector to reopen safely.



- The Outdoor Sector COVID-19 Impact Survey had 237 responses from organisations and 393 responses from outdoor professionals.
- Estimated loss of income is £108 million for 237 organisations and £10.5 million for 393 outdoor learning professionals for the period March 2020 to January 2021.
- 78% of organisations are currently taking advantage of government support.
- 77% of organisations responding have been established for 10 years or longer.
- 72% of organisations responding have furloughed some or all of their workforce.

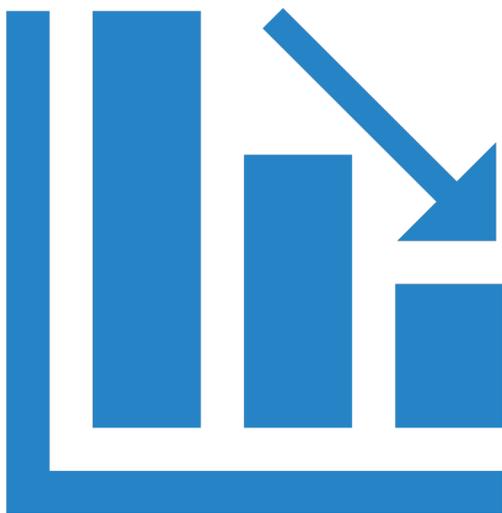
When combined with other sector data, it is reasonable to estimate loss of income for the outdoor learning sector at **£275 million** for the period March 2020 to January 2021.

When combined with other sector data, it is reasonable to estimate that during peak periods **70,000 young people** and **20,000 adults** are currently not benefiting from outdoor learning experiences each day.

- During peak periods, each day more than 28,500 young people and 7,800 adults are currently not benefiting from outdoor learning experiences with organisations that responded to this survey.
- 70% of organisations responding have experienced cancellation of all or the vast majority of contracts for providing outdoor services.
- 54% of organisations and 67% of outdoor learning professionals responding rely on publicly accessible countryside to deliver outdoor learning.

SURVEY HEADLINES

KEY SECTOR MESSAGES - IMPACT



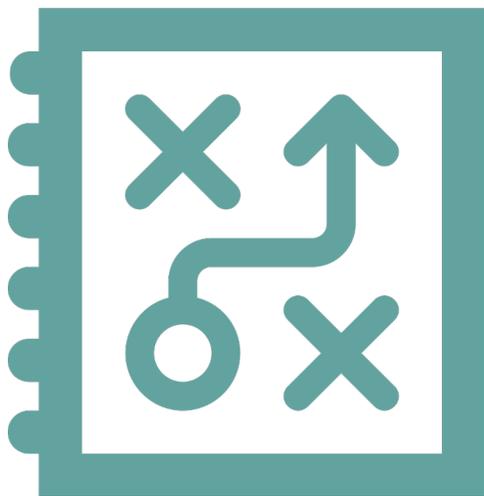
- Impact on the provision of outdoor learning in UK
 - A combination of social distancing guidance, wider health advice and school visit ban will reduce sector income by £275m in 2020. This is likely to result in too many outdoor learning providers, closed during lockdown (coinciding with their key income period), not being able to re-open for 2021. This could see a workforce of in excess of 15,000 significantly reduced with associated impact on livelihoods.
 - Schools, youth & adult groups and other community organisations and families will not benefit from participation in outdoor adventurous activity in 2020. Such activities are known to support personal and social development, improved health & wellbeing and better educational outcomes. In 2020 at peak periods this will impact approximately 90,000 potential beneficiaries a day, a capacity that will be much less in 2021.

KEY SECTOR MESSAGES – OPPORTUNITY



- **Support for schools**
The sector has a wealth of experience and resources, including talented instructors, coaches and trainers (who know their local outdoor environment well), as well as residential facilities often with extensive grounds. These people and resources can support a return to school with social distancing and provision of outdoor exercise.
- **Support for outdoor access**
The sector's workforce is well qualified and used to managing risk. It is well placed to guide and support appropriate use of the natural environment in a Covid19 aware society.
- **Support for key workers**
Where the sector's resources (including residential facilities) are not being used by its traditional clientele, those resources can be used to provide respite and therapeutic activity for key workers negatively impacted through the pandemic.

KEY SECTOR MESSAGES – NEED



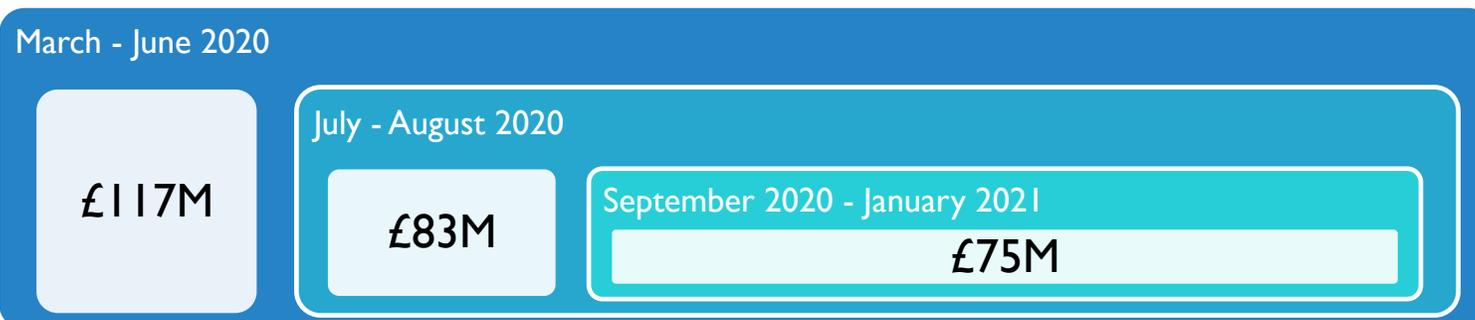
- **Protect the value of Outdoor Learning**
The sector needs help if the benefits it delivers for UK society are to be accessible immediately post lockdown and in 2021. This includes a stronger lead from government departments with regard to education, health and employment benefits associated with the sector.
- **Protect the sector**
outdoor learning organisations and the self-employed need financial assistance to protect resources and residential capacity in the form of grants and continued furloughing to reflect the loss of school visits and restrictions to other traded income associated with social distancing.
- **Protect the workforce**
Outdoor professionals need guidance on how best to enable schools, youth organisations, community groups and families to access and benefit from outdoor learning and outdoor adventurous activities. The sector will work to produce this in partnership with UK and home nation governments.

KEY SECTOR MESSAGES

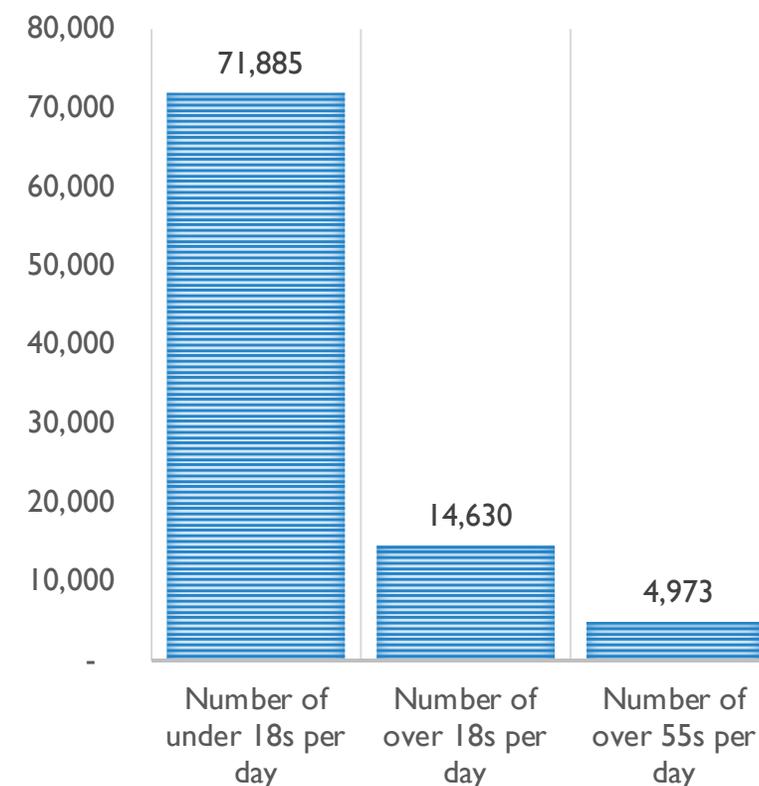
Scale of Impact

- The survey responses from 297 organisations and 393 outdoor professionals have been combined with other data from several member associations from across the sector to estimate the total impact based on scaling the number and size of organisations and the quantity of outdoor learning visits.
- We view these as conservative estimates.

Estimates of lost income to the outdoor learning sector



Estimate of the peak number of individuals per day not able to benefit from Outdoor Learning provided by the sector



A VIEW FOR THE FUTURE

- The current situation is an opportunity for the UK outdoor sector to come together as we serve our communities and our home nations. The benefits of the outdoors are central to active lifestyles, wellbeing, and mental health, and organisations and Outdoor Professionals must work together to ensure the value is not lost.
- The current challenges facing our skilled and passionate workforce may be new, but the ability to respond, adapt and evolve are part of the DNA of competent outdoor learning professionals.
- We champion a future where:
 - Outdoor citizens of all ages have a lifelong engagement with the outdoors for mental and physical health, wellbeing and nature connection.
 - Inspiration through outdoor sports and adventures leads to increased participation and the development of character, resilience, personal motivation, and hope.
 - Meaningful relationships across communities enrich a sense of place and enhance social skills, value differences and spark pro-environmental behaviours.



BRITISH ACTIVITY
PROVIDERS ASSOCIATION



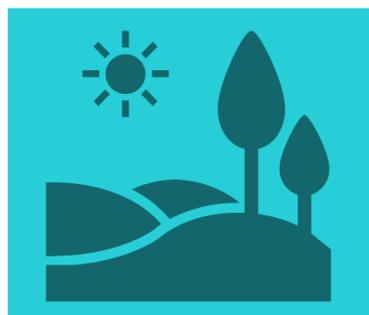
SUMMARY OF KEY OUTDOOR LEARNING SECTOR MESSAGES

Sector Impact



- The sector has been in shutdown during its two busiest trading quarters with little opportunity to make up lost revenue estimated at £275M until mid 2021.
- Many organisations expect to close and many more may not recover in time.
Continuing financial support is essential to keep the sector alive.

Lost Benefits



- At peak periods, each day over 70,000 under 18s and 20,000 over 18s have been missing out on valuable outdoor learning experiences that support their education, mental health & active lifestyles.
- Formative experiences for the development of outdoor citizens with resilience, self-motivation, hope, may not happen unless new initiatives are developed and funded.

New Opportunities



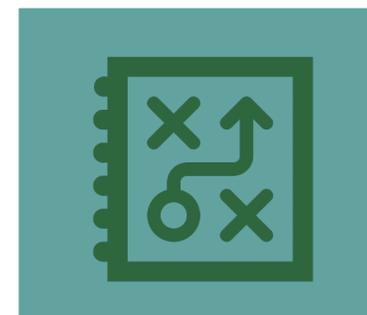
- A heightened public and government awareness of the value and importance of outdoor learning in education and learning for all ages across UK society.
- Outdoor learning professionals can provide solutions for a return to school with social distancing and provision of outdoor education, exercise and wellbeing.

Supporting Recovery



- The general public will be more engaged with the benefits of the outdoors for health and wellbeing and may be more motivated to get outdoors than previously.
- The sector is well placed to provide on-the-ground guidance and support of responsible access to countryside, coast and national parks in a COVID-19 aware society.

Key Needs



- A strong lead and coordinated guidance from across departments is essential to allow the sector to reopen safely.
- Issues such as access, group activities, minibus transport, overnight accommodation, and first aid must be addressed.
The sector will work to produce this in partnership with UK and home nation governments.



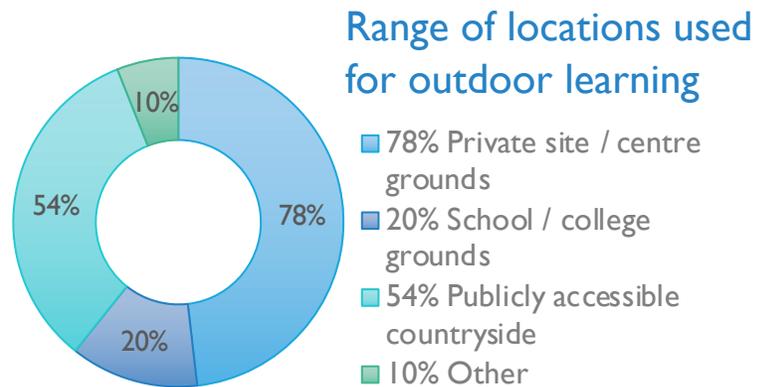
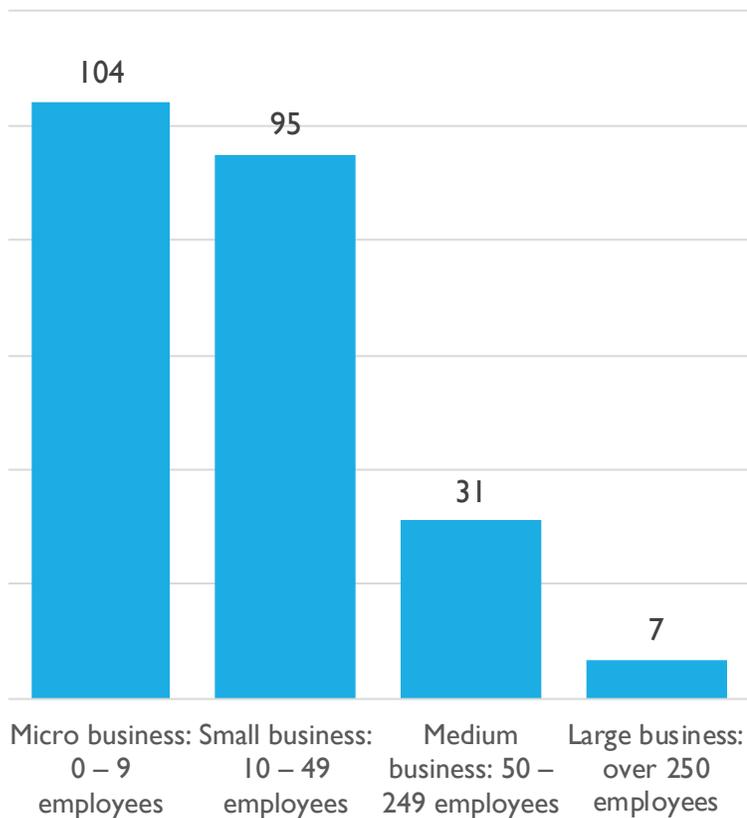
COVID-19 IMPACT SURVEY FOR ORGANISATIONS

SUMMARY OF RESULTS

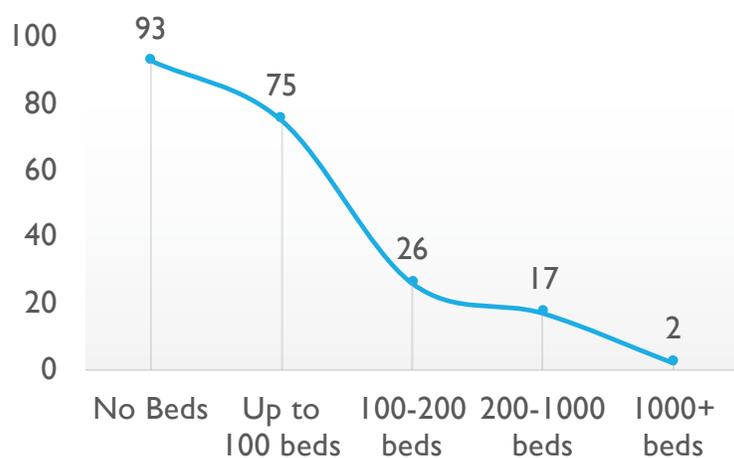


ORGANISATIONS RESPONDING TO SURVEY

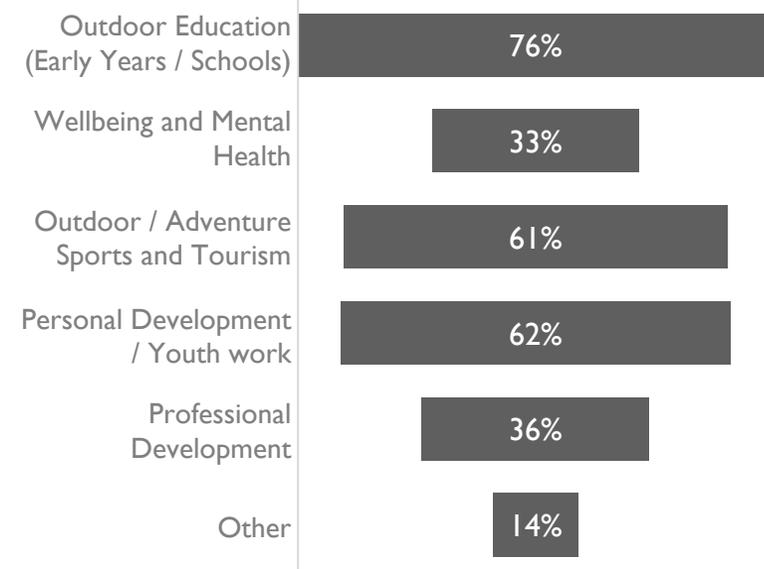
237 responses from organisations with 0-250+ employees



Organisations with residential capability



Areas of work in outdoor learning for the organisation



Years established as an organisation



ORGANISATIONS – KEY IMPACTS

237 responses from organisations with 0-250+ employees

Organisation changes

- 34% Retaining core team to enable the organisation to re-start services at a later date
- 24% Closing centres, sites used to provide outdoor learning or other services
- 17% Negotiating with clients over terms & conditions of bookings
- 5% Repurposing staff and/or facilities for other use
- 2% Preparing to close the organisation permanently
- 18% Other

72% of organisations have furloughed some or all of their workforce

70% have experienced cancellation of all or the vast majority of contracts for providing outdoor services

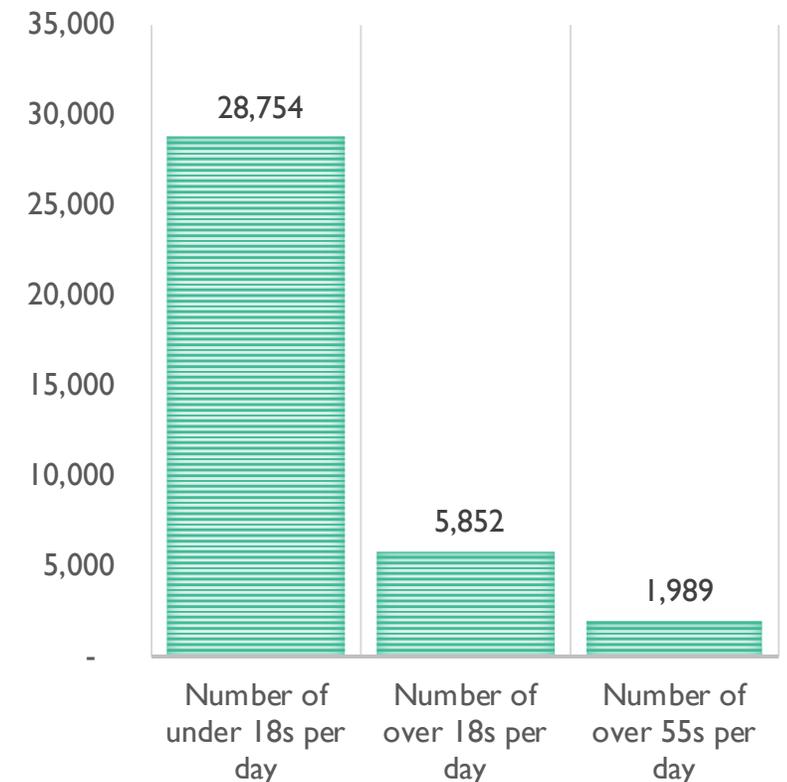
14% are unable to supply existing services and comply with health guidelines

5% have experienced loss of access to sites used for outdoor learning

3% are unable to utilise all or most bed capacity

8% have reported other immediate impacts

Individuals not currently able to benefit from the Outdoor Learning provided by survey respondents



Estimates of lost income

March - June 2020

£46.5M

July - August 2020

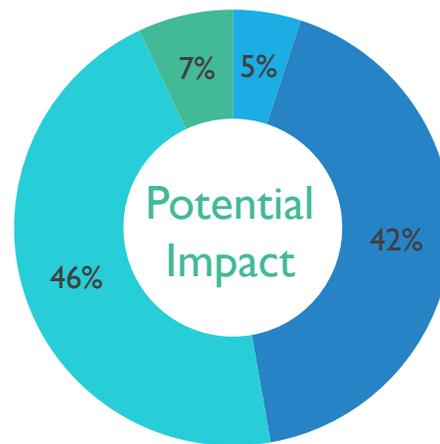
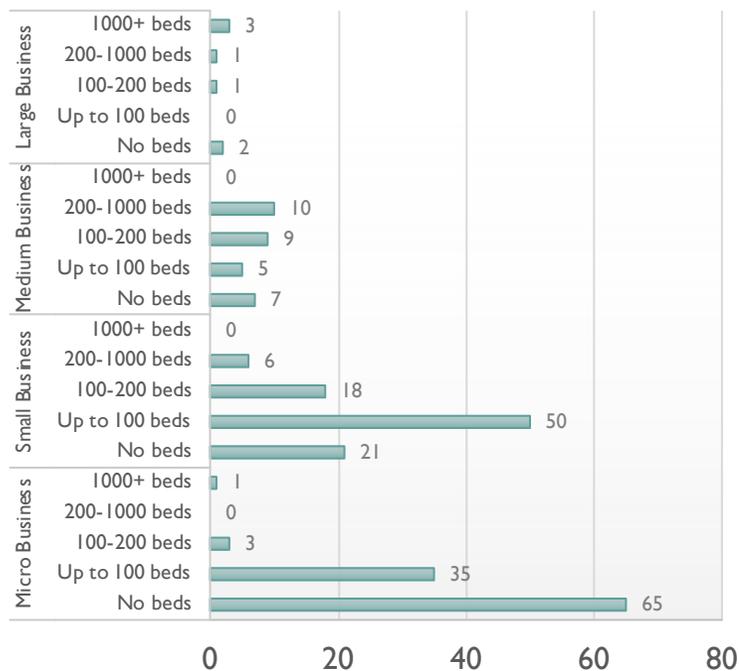
£33.4M

September 2020 - January 2021

£26.9M

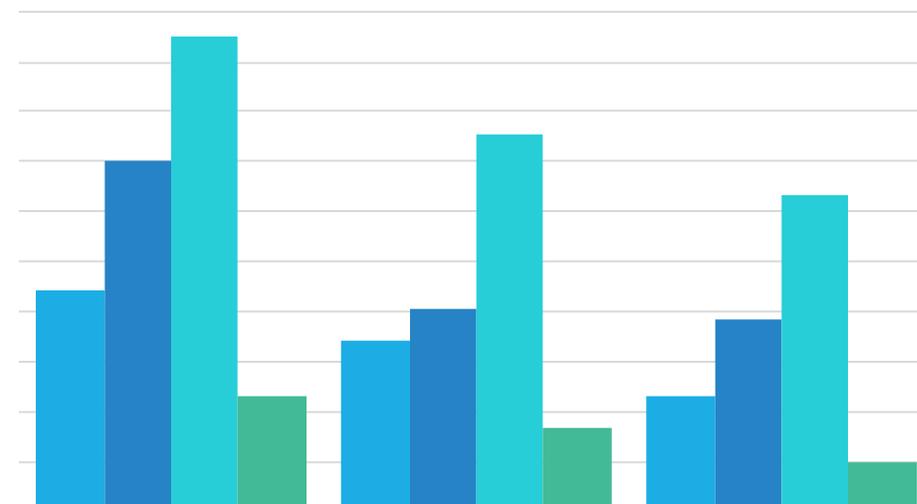
ORGANISATIONS – LONG TERM IMPACT

237 responses from organisations with 0-250+ employees



10 Expect to close
 84 Potentially closed with six months
 91 Expect to operate with reduced capacity
 14 Expect to change business model

Estimated Lost Income



78% of organisations are currently taking advantage of government support

7 Large business: over 250 employees
31 Medium business: 50 – 249 employees
95 Small business: 10 – 49 employees
104 Micro business: 0 – 9 employees

Period	Dark Blue	Light Blue	Green	Light Green
March - June 2020	£8,805,000	£14,053,700	£19,023,359	£4,577,032
July - August 2020	£6,800,000	£8,154,956	£15,116,839	£3,389,533
Sept. 2020 - Jan. 2021	£4,600,000	£7,688,280	£12,682,632	£1,959,700

LARGE BUSINESSES – SUMMARY OF LONG-TERM IMPACT

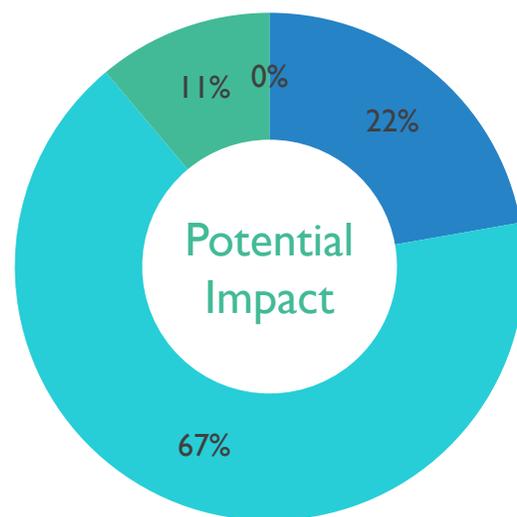
9 responses from organisations with over 250 employees

Likely Long-Term Impact - Residential capability

- Significant impact with possible closure
- Reduced demand will impact operational/commercial framework
- Ongoing investment in capital, staff and social impact reduced with eventual loss of expertise and sale of assets
- All growth plans either paused or stopped

Likely Long-Term Impact - No beds

- Loss of income will affect funds available for activities and the maintenance/operation of buildings

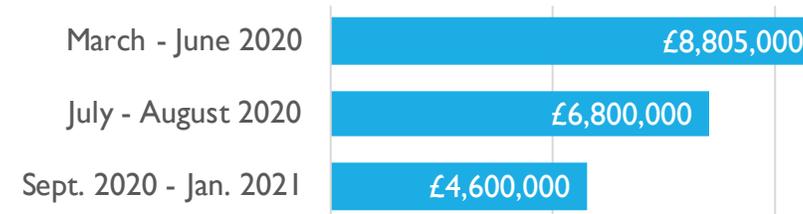


- Expect to close
- Potentially closed with six months
- Expect to operate with reduced capacity
- Expect to change business model

Support Needs

- Support for residential programmes to ease the burden at schools
- All governments (UK, Scotland and Wales) recognise the impact on the outdoor residential sector and engage to find solutions
- Ongoing financial support as Outdoor Centres are unlikely to be running normally until post Jan 21
- Timescales for the restrictions to plan operationally
- Permanent increase in funding for the FE Sector

Estimated Lost Income



MEDIUM BUSINESSES – SUMMARY OF LONG-TERM IMPACT

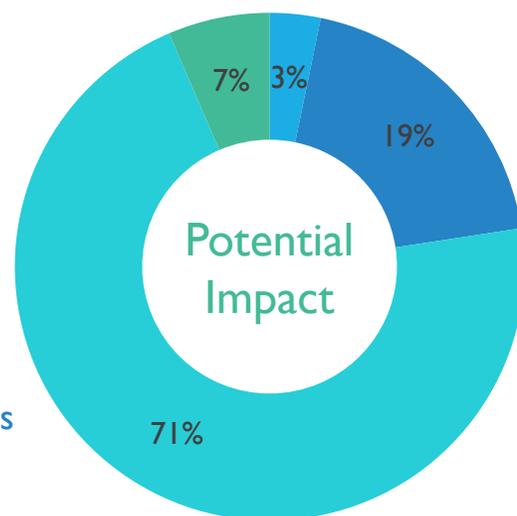
31 responses from organisations with over 50-250 employees

Likely Long-Term Impact - Residential Organisations

- If schools are not willing to undertake school trips the impact will be closure
- Large scale redundancies if Government support expires before operations can recommence
- Fewer clients means less capacity to generate income
- Depends on the support from Local Authorities
- Significant review of our model in terms of viability

Likely Long-Term Impact – Non-Residential Organisations

- If delivery is not resumed soon, staff will be made redundant
- Vulnerable pupils are missing out on a safe environment
- Unlikely to be able to retain all our staff and reopen all our sites
- Without substantial support, the ultimate position will be closure
- Impact on students and learning



- Expect to close
- Potentially closed with six months
- Expect to operate with reduced capacity
- Expect to change business model

Support Needs

- Support from DfE to stress the importance of outdoor learning both in school and on school trips
- Grant and the furlough scheme to continue
- Restart education trips as quickly as possible
- Guidelines on the safe use of outdoor spaces and recognition that outdoor learning has a part to play in our recovery both mentally and physically.
- Funding and focus on engaging young people in outdoor activities post COVID-19 and beyond.

Estimated Lost Income

March - June 2020	£14,053,700
July - August 2020	£8,154,956
Sept. 2020 - Jan. 2021	£7,688,280

SMALL BUSINESSES – SUMMARY OF LONG-TERM IMPACT

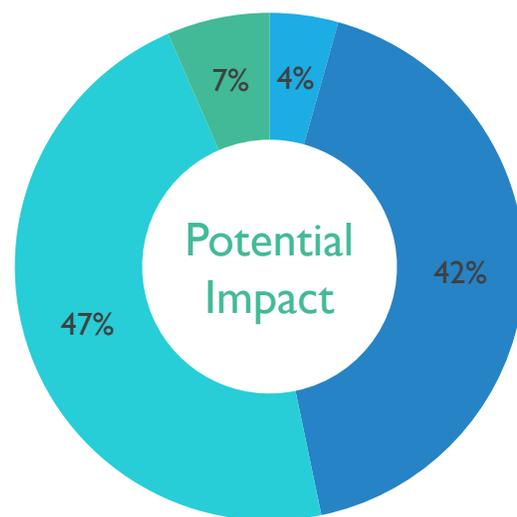
95 responses from organisations with 10-50 employees

Likely Long-Term Impact - Residential capability

- Devasted the main part of the outdoor season and Centres are now facing closure
- The majority of staff will be made redundant when the furlough scheme ends
- Reduced group sizes and limited income generation for a number of years
- The challenge is whether the Local Authority will continue to support Outdoor Centres
- Less young people from poorer backgrounds being able to access outdoor activities

Likely Long-Term Impact - No beds

- Struggle to generate income if restrictions continue to autumn
- 75% of jobs at risk by September
- Downsize all the activities at the centre
- Reshaping the business to be smaller and more local
- Potential for business to close

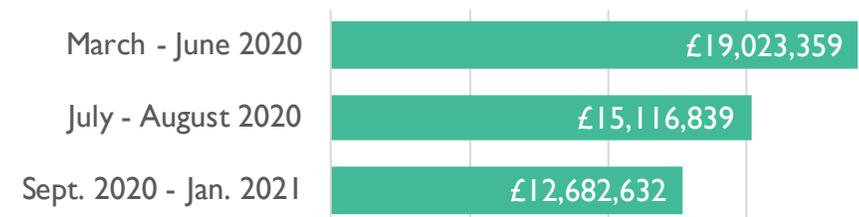


- Expect to close
- Potentially closed with six months
- Expect to operate with reduced capacity
- Expect to change business model

Support Needs

- More grants as opposed to loans, and continue the furlough scheme through the winter
- Clear and consistent messages about the benefits of outdoor activities and learning
- Making Outdoor Education a mandatory part of the curriculum
- Clear messages about Educational Visits and residential Visits re social distancing in the short, medium and long term
- Funding for school trips for students from disadvantaged areas

Estimated Lost Income



MICRO BUSINESSES – SUMMARY OF LONG-TERM IMPACT

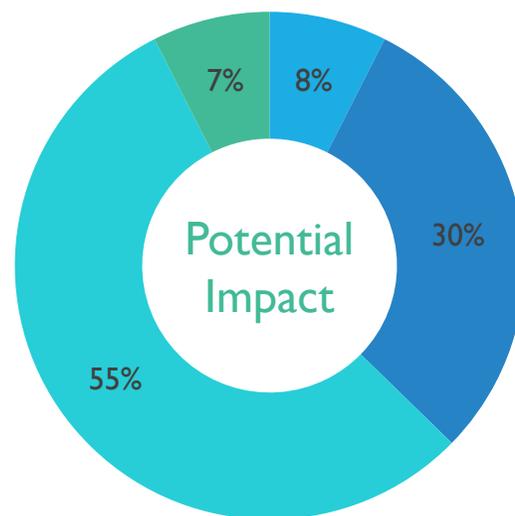
104 responses from organisations with 0-9 employees

Likely Long-Term Impact - Residential capability

- Potentially many outdoor organisation will fold as the work is seasonal, being shut down in their busiest period of the year
- Planned development have been put on hold for the foreseeable future
- Reserves have been significantly depleted and staff have been made redundant
- Long term increased debt
- Adaptation and new policies will be needed for social distancing

Likely Long-Term Impact - No beds

- Permanent staff cuts have already been made and survival depends on when lockdown ends
- A reduction in the client base if they do not have the funds for outdoor activities
- Vulnerable adults and children losing activities which support their mental and physical wellbeing
- Travel bans in place mean that overseas contracts cannot be fulfilled until further notice
- Loss of specialist volunteers through inactivity



- Expect to close
- Potentially closed with six months
- Expect to operate with reduced capacity
- Expect to change business model

Support Needs

- Recognition of the value of the outdoor sector and the support needed financially, both to individuals and businesses
- Further small business grants
- Clarity on how lockdown will be eased to enable planning
- Lobby government to get young people outdoors once COVID-19 is over to improve both physical and mental health
- Outdoor education should be core to the school programme

Estimated Lost Income

March - June 2020	£4,577,032
July - August 2020	£3,389,533
Sept. 2020 - Jan. 2021	£1,959,700



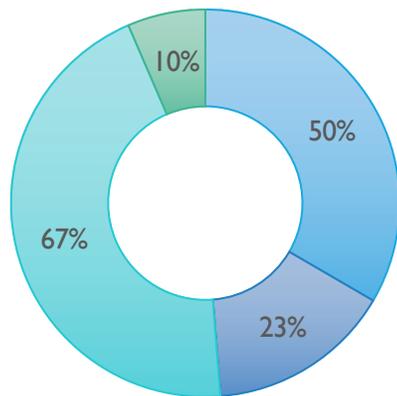
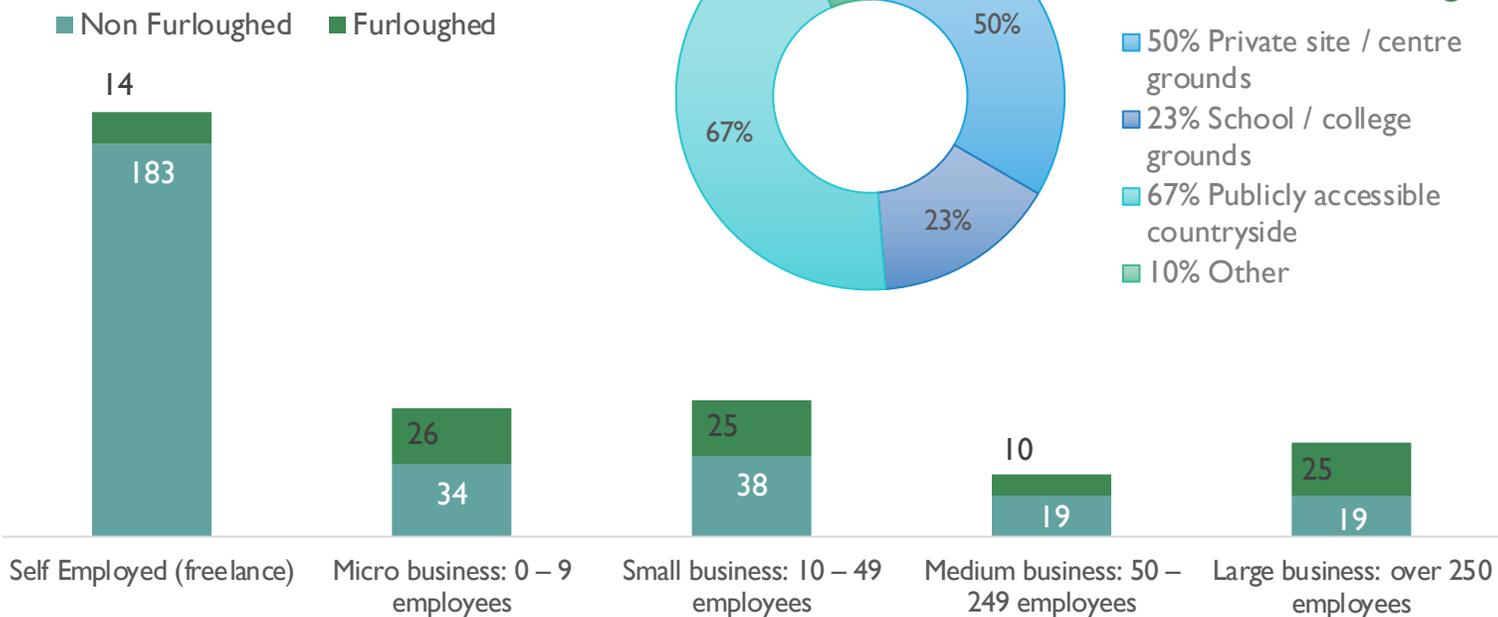
COVID-19 IMPACT SURVEY FOR OUTDOOR PROFESSIONALS

SUMMARY OF RESULTS



OUTDOOR PROFESSIONALS RESPONDING TO SURVEY

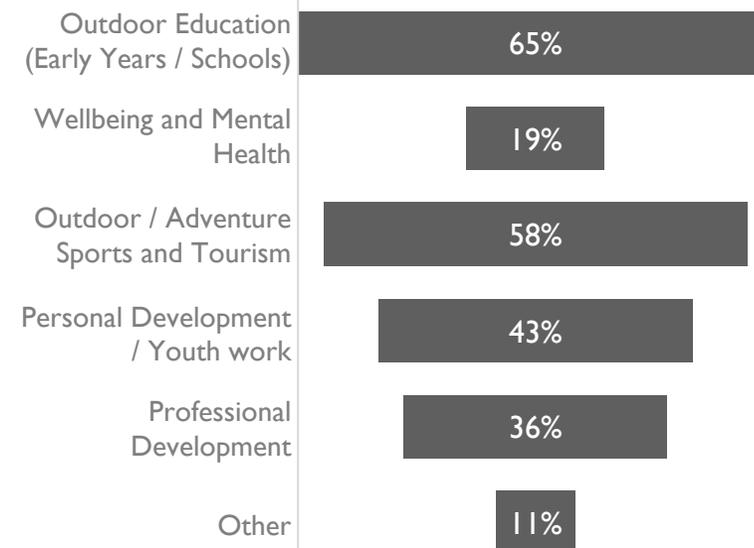
393 responses from outdoor professionals



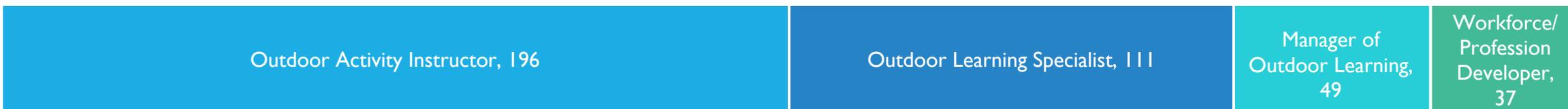
Range of locations used for outdoor learning

- 50% Private site / centre grounds
- 23% School / college grounds
- 67% Publicly accessible countryside
- 10% Other

Areas of work in outdoor learning



Primary job role of respondents



OUTDOOR PROFESSIONALS – PERSONAL IMPACT

393 responses from outdoor professionals

How are you dealing with a shortfall of lost income?

- Loan for the business
- Claiming via HMRC scheme for self-employed?
- Savings
- At the moment just waiting to see what happens, if I loose my job I will need to start looking for alternative work. It's the uncertainty of when work will return that makes it difficult, I want to be in a position to return to working outdoors once things get under way again.
- Found another job working on a farm
- Gardening, DIY and whisky. On a serious note: Stringent personal budgeting and online tuition.
- Furlough
- Business paused. We will loose profit opportunity and re-budget to make a loss in the year. No re-investment in equipment and training as planned. Looking for grant opportunities to continue as planned.
- Living off savings
- Taking out loans
- Careful budgeting as the future is so uncertain
- Lucky accommodation is still being provided so just requires better budgeting for essentials like food.
- I am lucky that I am isolating with my family so I have minimal outgoings. If I was isolating in my accommodation supplied by my company I would still be able to afford common amenities but I would be unlikely to put anything into savings.
- Sold my car to have less outgoings.
- Living on savings and income from part time lecturing which ends in early May
- We are tightening our belts with respect to all spending, and rearranging our finances to be able to use savings as an when it is necessary.
- Partner has regular income.
- Applied for universal credit, tried to get other work.

26% of outdoor professionals responding to the survey have been furloughed

- At present dipping in to reserves and other areas but after that I have no idea.
- Spending time at home planning alternative ways of using my outdoor qualifications for the future. Considering online training, albeit minimal work.
- Not significant to make difference.
- Self employed work accounts for approx. 60% of my income. I have been able to increased the other 40% (Zero hours contract). I will be hoping to get the self-employed grant in June.
- Too soon to tell.

Estimated Lost Income



OUTDOOR PROFESSIONALS – LONG TERM IMPACT

393 responses from outdoor professionals

What are the likely long-term impacts of Covid-19 on you?

- Will need to build my business up again. Could mean fewer people coming to my sessions and holiday clubs. Schools will stay the same I assume but maybe not.
- Do not see working in the outdoor sector for the next 12-months
- A change in organisation - smaller class sizes, perhaps schools will want to pay less daily rate as a result.
- Unlikely to be able to pay into pension this year. I had planned to get 2-3 more NGBs this year - in order to be open to more work.
- Loss of job
- Stall in career
- Loss of accommodation
- Hopefully once restrictions are lifted, schools will invite me back and people will be desperate to get back to Forest School activities...
- Long term reduction in clients
- Lack of continuity. Reduced access to non-key worker/vulnerable children.
- Loss of customers, loss of income, possible bankruptcy
- Loss of contact with learners and colleagues. Having to change work patterns and delivery in the short term and possible long term patterns of work in the future. More remote learning?
- That I will have to find alternative work if the government removes the self employment grants during the autumn and winter months when there is no freelance work available for me. It certainly may be difficult to go back to working as an ML full time in the summer if I find alternative and secure work in another industry.
- Uncertainty of the world of the outdoor sector and jobs
- Less group travel. Restrictions on international travel and potential of expensive international flights.
- Reduction in investment. Slower growth than expected. reduction in training. Social distancing could impact the business for the long term.
- Significant concern about the future of funded projects and their ability to resume under whatever restrictions we face.
- See this as a pause on my instructor life.
- Unknown until schools get back
- Group activities could be restricted
- Potential loss of my business
- Not likely to have any work till Easter 2021. Several of my employers are single operators and may not make it through the next few months as a business. The work will be slow to come in I think.
- May well change career.
- Loss of income, not getting the booked in qualifications for this year, not up keeping with the skills I already have, long term grumpy for not spending the time I want and need outside

This slide is a limited selection of the survey responses to this question

REPORT PREPARED BY INSTITUTE
FOR OUTDOOR LEARNING. FOR
FURTHER DETAILS PLEASE CONTACT:

- Neal Anderson, IOL Professional Standards Manager
- neal.a@outdoor-learning.org

