

Review



Review of Current
Provision and Level of
Incidents in the Adventure
Activities Industry in
Northern Ireland

sport
Northern Ireland




Introduction

Adventure Activity Associates Ltd. was appointed by Sport Northern Ireland to undertake a survey on the scale and nature of the current provision of adventure activities in Northern Ireland and determine the level and nature of recording of incident occurrence.

While an online questionnaire was primarily used, there was also direct contact with providers of adventure activities.

A copy of the full report is available online at **www.sportni.net**



A person in a blue shirt and white helmet is climbing a vertical rock face. The climber is positioned in the lower right quadrant of the image. The rock is a light brownish-grey color with visible horizontal layering. The ocean is a deep blue with white foam from waves crashing against the base of the cliff. A decorative teal circle with a white dotted border is located in the upper left quadrant, containing a quote.

“There is no doubt
that the over 18
sector is achieving
significant and
accelerating
growth”

Methodology & Scale

A previous survey commissioned by Sport Northern Ireland in 2005 identified 263 providers and one of the purposes of this assignment was to update the information within the 2005 report. Of the 263 providers previously identified:

1. 23% were uncontactable or no longer operate.
2. 45% fell out of scope of the Terms of Reference of the present survey. Primarily, this exclusion has applied to providers who are:
 - In the charitable and voluntary sector but without any access to activities being offered for the general public.
 - Schools, colleges and universities without access for the general public.
 - Local authority sports clubs and centres without access for the general public.
 - Member only clubs.
3. 32% were carried forward into the database for the present survey

In order to identify providers who were not listed in 2005 a separate survey of provision was undertaken by means of web and documentary research together with reference to data held by Sport Northern Ireland and Outdoor Recreation Northern Ireland (ORNI – formerly CAAN).

These newly identified providers (of which there were 32) were added to the survey database to produce a total number of 116 providers.

116 electronic questionnaires were sent out, of which 6 were immediately returned as inactive links that could not be used. This left a useable list of 110 providers.

At the end of the survey period, 51 responses had been received, representing 44% of the target audience. This is a highly encouraging level of response for a survey of this kind but it was disappointing to note that some responses contained little or no information relating to important aspects of the survey such as staffing or incident reporting. The contractors felt that this may be indicative of limited record keeping undertaken by small or sole providers in Northern Ireland.

Direct telephone contact was used to follow up on incomplete questionnaires and to providers who had not returned questionnaires but this only had limited success. A few providers stated that they were suspicious of public bodies such as Sport Northern Ireland and thus reluctant to give more than minimal information.



Results of Survey

Scale and nature of provision

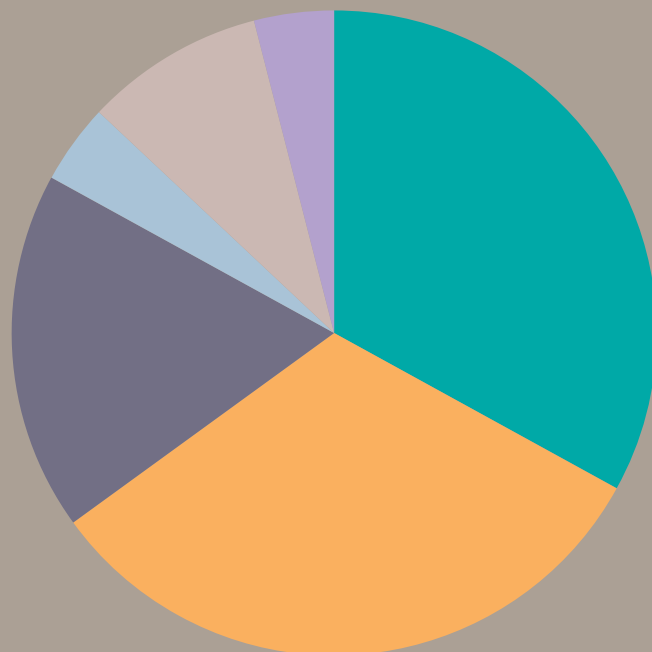
It should be emphasised that this survey was of a restricted portion of the sector of adventure activities and not for the entire sector itself. The extrapolation of the data beyond the actual responses received has been avoided.

Number of adventure activity providers in Northern Ireland

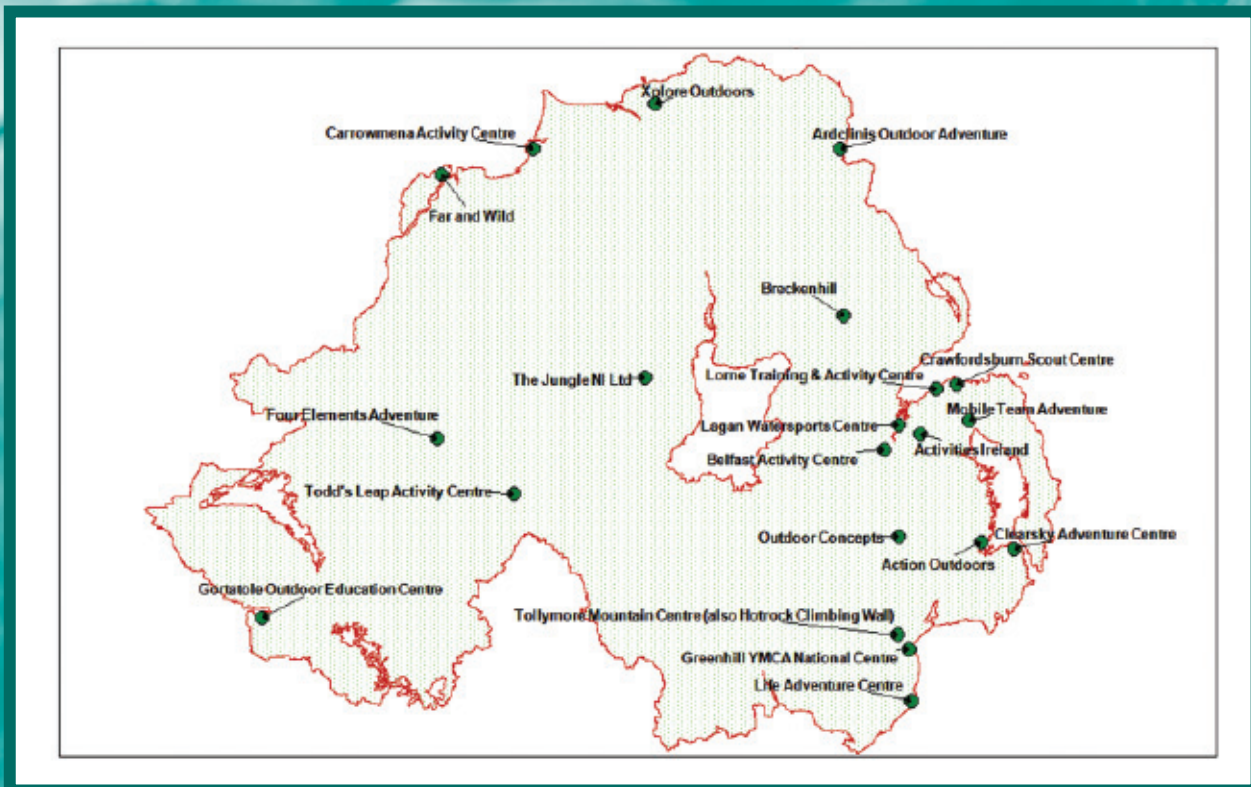
The Terms of Reference focused on those providers who offer courses to the general public and within this category there were found to be 110 providers.

The summary of the number of providers by county in the surveyed sector is as follows:

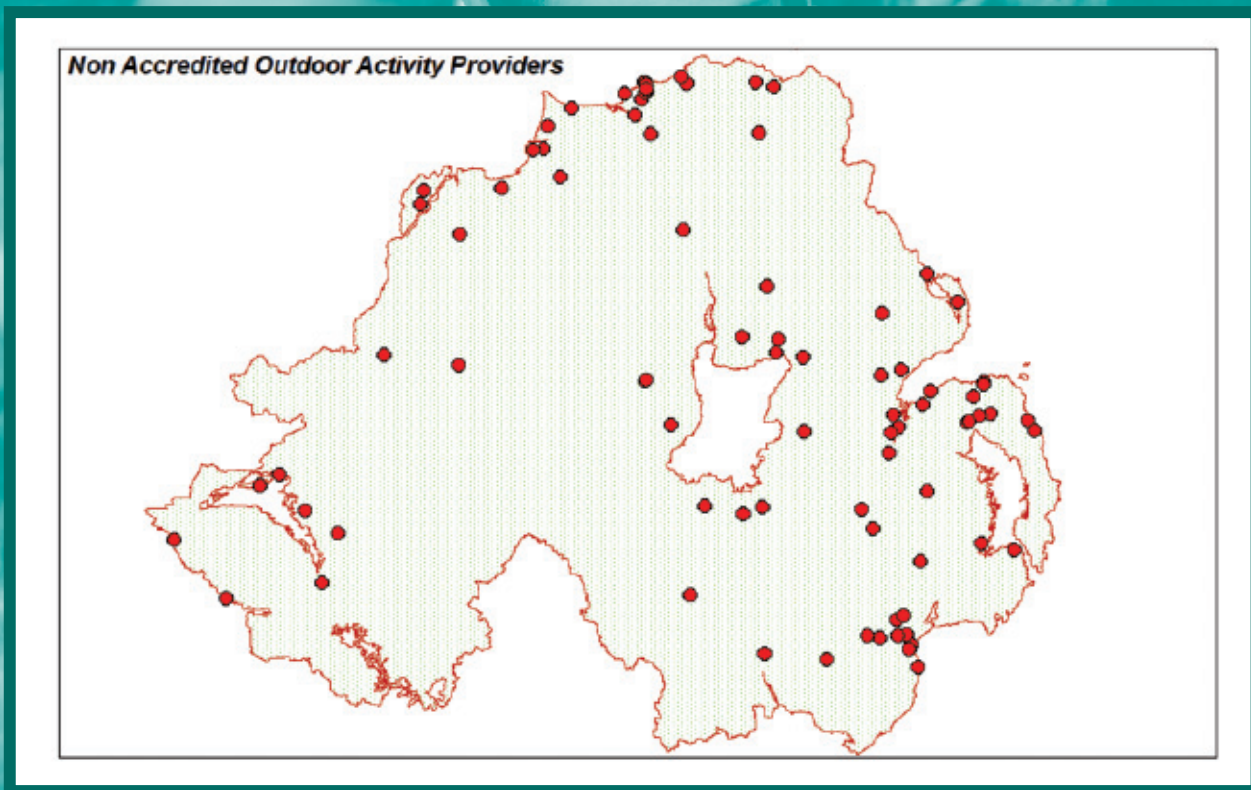
Co. Down	37
Co. Antrim	35
Co. Londonderry	19
Co. Tyrone	05
Co. Fermanagh	10
Co. Armagh	04



Adventuremark Accredited Outdoor Activity Providers



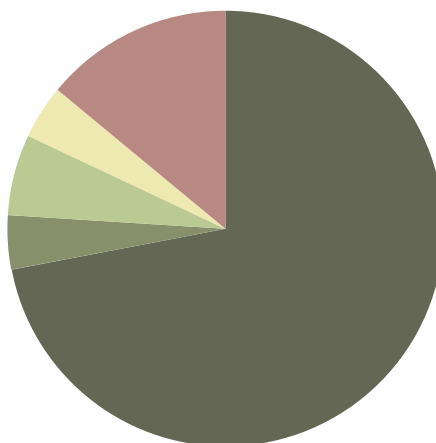
Geographical Location of Adventure Activity Providers in Northern Ireland 2012



Type of provision

On a response of 50 providers the breakdown of type of current provision is as follows:

Type	%
Commercial	72
Public Body	04
Charitable	06
Voluntary	04
(Other)	14

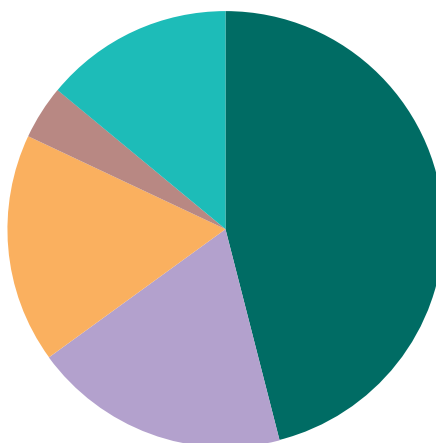


While commercial providers are numerically the most dominant in the provision of activities available to the public, a small number of public body providers are large centres responsible for a high volume of activity.

Main purpose of provision

On a response of 50 providers the breakdown of the stated purpose of current provision is as follows:

Purpose	%
Activity tourism	46
Personal and social development	19
Skills development	17
Curriculum/education	04
Coach or leader development	0
Team development	0
(Other)	15



While coach and leader development is not a stated primary goal it was clear through contact with providers that leader and coach development regularly occurs as a by-product of employment.



Most widely offered activities

On a response of 50 providers the breakdown of the most widely offered activities is as follows:

Activity	% of providers offering the activity
Paddle sports	42
Orienteering	40
Rock climbing	35
Archery	33
Hillwalking / mountaineering	31
(other)	40

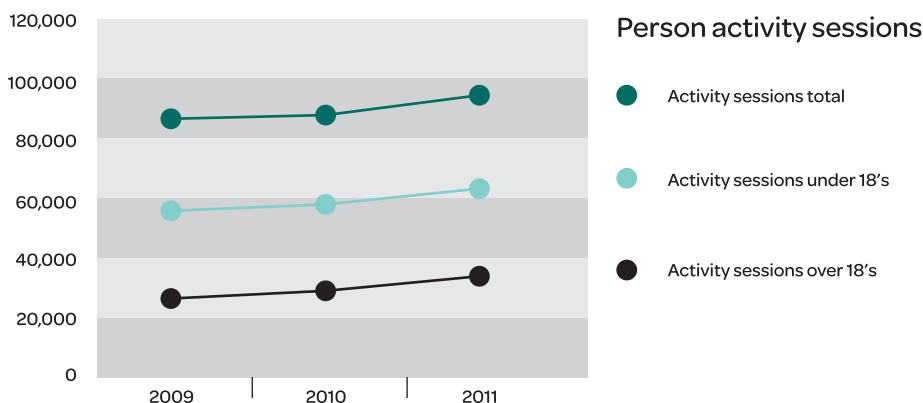
Please note that since many providers offer multiple activities the total appears to exceed 100%. The data indicates that 42% of respondents offer paddle sports, 40% orienteering and so on. Most operators offer relatively mainstream adventure activities but alongside these are many others including geo-caching, mountain boarding, paintball and other combat games, jet skiing, clay shooting, air based activities, rowing, zorbing, disc golf, water skiing, coastal traversing, hovercrafting and land yachting.

Total volume of activity provision

On a response of 33 providers the reported total annual volume of individual activity sessions provided is as follows:

Person activity session			
Year	Under 18's	Over 18's	Total
2009	57,939	26,768	84,707
2010	58,875	28,227	87,102
2011	62,361	33,160	95,521

Presented graphically, the significant growth in the provision of individual activity sessions is clear.



Over the three years surveyed (2009-2011) the growth in volume within each category is as follows:

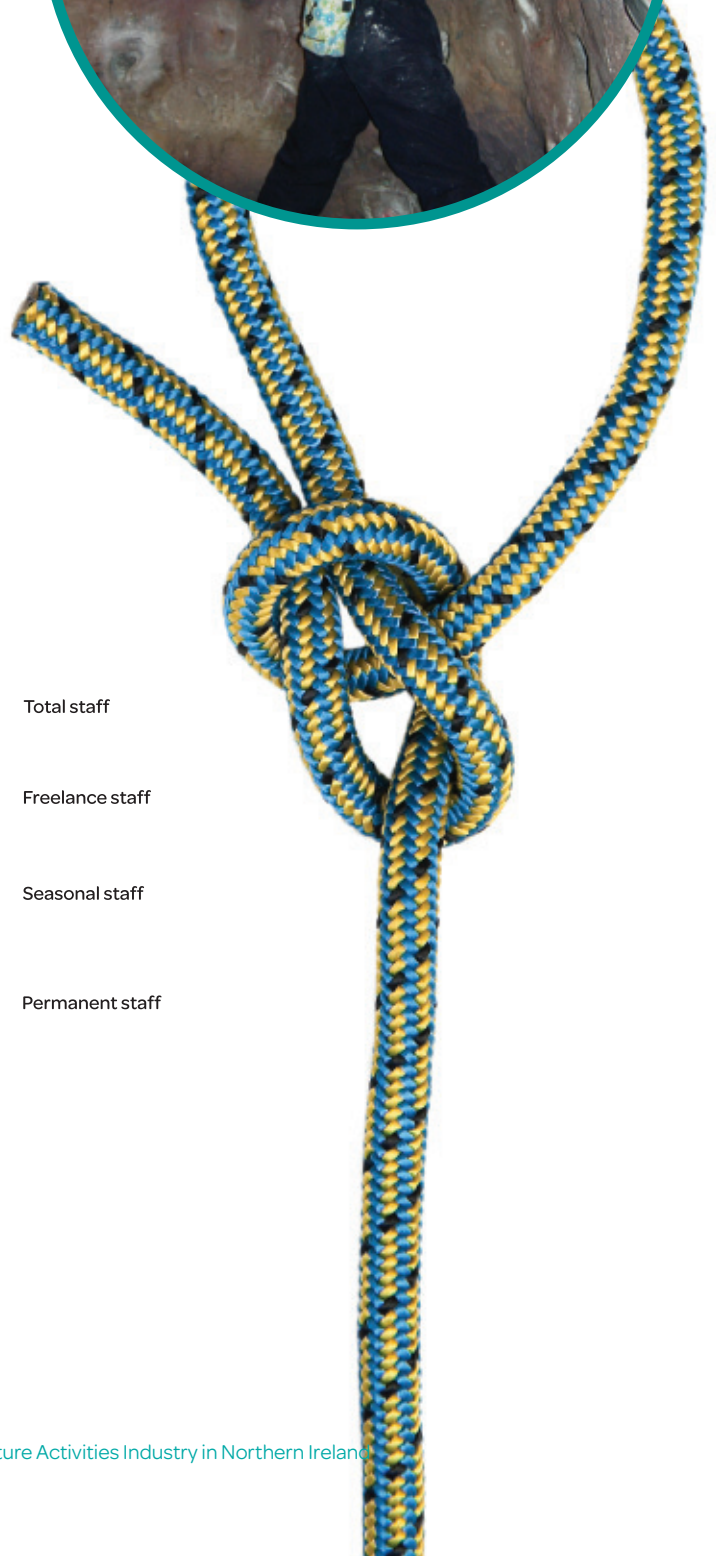
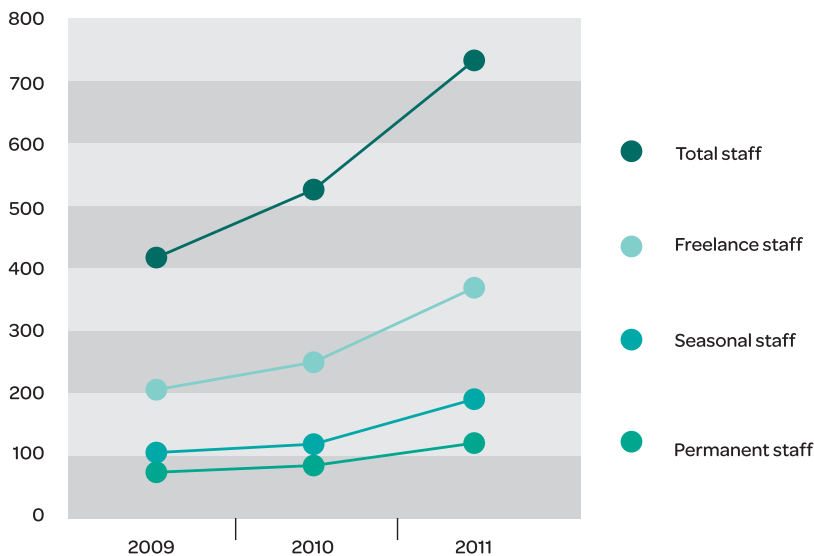
	% growth in volume 2009 - 2011
Under 18's	7.5
Over 18's	24.3
Total	12.8

There is no doubt that the over 18 sector is achieving significant and accelerating growth.

Staffing

The number of permanent and seasonal staff

On the basis of 34 responses there appears to be a steady growth in the number of permanent staff with over 100 people in permanent employment in 2011.



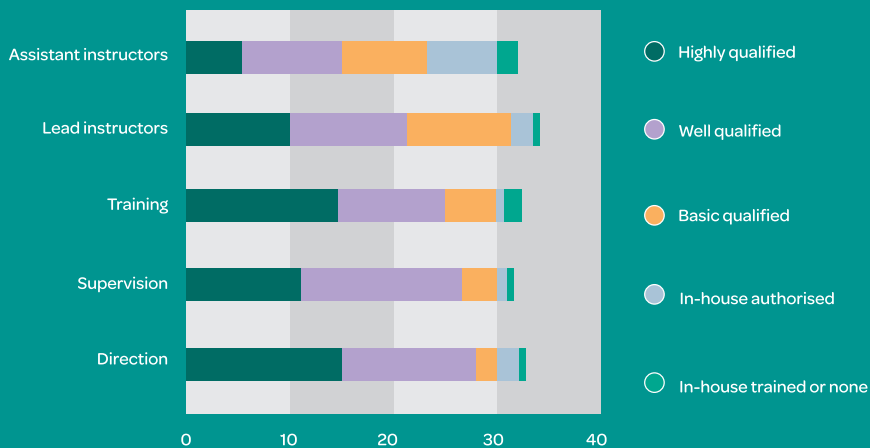
Staff qualifications

There were 36 responses about staff qualifications and these contain some complex information which is available in the full report.

- A relatively high proportion of lead instructors (11) are reported as only holding basic qualifications.

In broad terms the data suggests that:

- The most highly qualified staff are deployed in the overall direction of provision and in the training of other staff.
- More junior instructional staff are less well qualified than those supervising sessions.
- Little use is made of staff who do not hold some external qualification.



Safety practices regimes and policies

Near miss reporting

On a response of 43 providers, 80% reported that they have a system for recording near misses. Although in wide use, 'near miss' is a somewhat unsatisfactory term for a near accident or an occurrence which did not have serious consequences but which could have easily done so, with a minor change of circumstances.

indicative of a healthy safety culture. It would be desirable to instigate a campaign to raise the awareness among providers to the potential gains from near miss reporting, particularly those relating to the importance of near misses as a signpost to the possibility of more serious occurrences.

It should be noted that these are small numbers. The accepted model of incident occurrence is a pyramid – with significant occurrences being far outweighed in frequency by minor or near miss reports. Higher levels of near miss reporting are normally

Year	Near misses reported
2009	9
2010	15
2011	20

Reporting of Significant Injuries

On the basis of 34 survey responses the number of serious and significant injuries reported is as follows:

Year	Serious and significant occurrences
2009	1
2010	2
2011	3

On the basis of the survey, these small results have little statistical significance and it would be erroneous to conclude that there has been a threefold deterioration in safety performance since 2009!

At a crude level there can be confidence that the level of serious occurrences in the surveyed sector is at a low level. Nevertheless, it was detected that operations in the coastal region seem to have led to a disproportionately high level of adverse occurrences.

External accreditation

On a response of 48 providers the reported breakdown of externally held accreditation is as follows:

A certain amount of caution in considering these figures must be applied since there was evidence that some responders fail to make a distinction between organisational accreditation (e.g. provider approval) and individual qualification from the same authority. This primarily applies to the responses for BCU and RYA as at the time of the survey the Canoe Association of Northern Ireland reported that there are no BCU approved centres in Northern Ireland.

Some education of providers and clients in the status and significance of different forms of organisational accreditation and how they differ from individual qualification is desirable.

Accreditation	% holding the accreditation
Adventuremark	21
LOtC Quality Badge	5
British Canoe Union (BCU)	18
Royal Yacht Association (RYA)	29
British Horse Society (BHS)	5
Professional Association of Diving Instructors (PADI)	13



Public liability insurance (PLI) cover

Based on 35 survey responses, the breakdown of levels of PLI cover reported is as follows:

Level of cover	% of providers reporting
£1M	6
£5M	57
£10M	23
Other	14

Some public bodies state that a level of cover of £10M should be in place but others do not require this. It would be helpful to the industry if some objective advice as to an appropriate level of cover could be sourced.

8% of responders indicated that insurers had given some kind of discount to general insurance premiums when evidence of appropriate staff qualification was provided. A field survey indicated that providers were very interested in the effect that holding a recognised accreditation may have on insurers and the premiums set.

External technical experts

Only 27% of responders reported that they have formal arrangements for sourcing external technical advice on activities although follow up surveys suggested that informal arrangements exist. It is a requirement of external accreditation such as Adventuremark that external technical advice can be obtained.

It would be desirable for the sector to be made aware of the possibilities in this area.

In-house training for staff

70% of responders arrange in-house training for staff.

General safety and risk assessment policies

92% of providers responding reported that they have such systems in place. 90% reported having specific activity and/or site based risk assessments. However, a field survey suggests that risk assessments are often highly generic, suggesting that a raising of expertise and awareness is desirable. The sector would benefit from being made aware of the benefits accruing from careful and effective site-specific risk assessment.

Confidential medical declaration

81% of responders report having a system of collecting confidential medical information from participants. It is desirable for the sector to be encouraged to make this a standard feature of all activity provision.

Parental consent

84% of responders indicated that they have arrangements for obtaining formal parental consent for participants under 18 years of age. In most cases this is required but it is likely that some responses have been from providers who are not actively engaged with the under 18 sector.



Conclusions and recommendations

The survey has indicated a number of positive features in the sector:

- There are growing levels of activity provision and participation.
- There is steady growth in employment within the sector.
- The occurrence of serious incidents is low.

However, although practices which appear to match the industry norm are widespread they are by no means universal and some are considered to be in a somewhat undeveloped form.

There are likely to be a number of contributory factors to this situation but these are likely to include:

- The absence until recently within Northern Ireland of objective external accreditation and its associated discipline.
- Fragmentation within the sector, sometimes fuelled by issues of commercial competition.
- The prominence of small providers (often with only a single permanent staff member) within the surveyed sector.

There would be great benefits from a campaign to raise awareness and disseminate good practice throughout the sector. The best providers in Northern Ireland bear comparison with the best anywhere, but contact with providers has shown that some

may be operating near the limits of their qualification and/or technical knowledge. There is no evidence that this is deliberate as there is wide enthusiasm for and commitment to good practice in adventure activity provision – however, not everyone appears to know what constitutes that good practice.

The contractors noted that Sport Northern Ireland has both access and influence in the surveyed sector and that consideration should be given as to how support could be provided to the continuing development of the quality and safety of adventure activity provision in Northern Ireland.

Particular opportunities exist to:

- Bring providers together for workshops and conferences in order to identify and share good practice.
- Publish guidance material in print or electronic media.
- Continue to promote the value of external accreditation.

Specific areas for attention identified by the survey and recommended by the Adventure Activities Associates are as follows:

1. Information on the particular features, problems and opportunities of the over 18 sector. Much good practice has been developed with an expectation that clients are minors and this needs to be mirrored for the over 18 sector.
2. Guidance material on what activity technical experts are and how they are used.
3. Guidance material on the processes of developing and using site specific risk assessments.
4. Guidance material on decision making in volatile environments such as the coastal waters and cliffs.
5. Good practice in the use of medical declarations.
6. Advice to providers on appropriate levels of Public Liability Insurance.
7. What external accreditation is available, how it is obtained and how it differs from individual qualification.
8. Guidance material on recording and analysing incidents and near misses.
9. The development of a mechanism for sharing incident data across the sector.



This document is available in other accessible formats on request, and online at www.sportni.net

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