Review

Review of Current Provision and Level of Incidents in the Adventure Activities Industry in Northern Ireland in 2014

Sport Northern Ireland

Introduction

Adventure Activity Associates Ltd. were appointed by Sport Northern Ireland to construct and undertake a survey which would review 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. An initial survey was completed in early 2012 covering the period 2009-2011.

In August 2012 Sport Northern Ireland published a summary of the findings under the title *"Review of Current Provision and Level of Incidents in the Adventure Activities Industry in Northern Ireland"* - available online at www.sportni.net

This report extends the survey data to include the years 2012 and 2013.

A broadly similar methodology as that employed in 2012 was used but with some modifications as follows:

- The starting point for a list of those to be invited to complete the questionnaire was the database generated in the original survey, updated to October 2014 by Outdoor Recreation NI.
- Internet-based research was used to identify and add any active providers who were not already on this list.
- A working list of 217 providers was used; 10 of these were eliminated as "dead letters".
- A total database incorporating 207 providers was created.
- Some new activities were added to the questionnaire activity list.
- A subdivision was included in the questions concerning incident reporting so that, in effect, there was a record of minor, significant and serious incidents.
- A question was added regarding respondents' preferences for future regulation or oversight of the outdoor activity sector.

Adventure Activity Associates

Adventure Activity Associates Ltd. is a company based in Scotland providing consultancy and support within the adventure activity sector.

Clients include the Department of Culture Arts and Leisure (DCAL), the Mountaineering Council of Scotland, the Adventure Activity Industry Advisory Committee, the Expedition Providers Association, Shaftesbury Young People, Consarc, and various County Councils.

Bob Barton and Iain Peter are the two directors of Adventure Activity Associates; both prominent in adventure activities.

Methodology and Scale

The starting point for the research was the previous list of providers identified by AAA's in the 2012 survey (112 providers). Updates to this were provided by Outdoor Recreation NI and also through an extensive web search to give a new total of 217 – which is a 100%+ increase.

217 electronic questionnaires were sent out of which 10 were immediately returned as inactive links that could not be used which left a credible list of 207 providers.

The survey was re-sent on two separate occasions to maximise the opportunities for successful receipt and two separate emails were sent to encourage interested parties to respond.

At the end of the survey period, 48 responses had been received, representing 23% of the target audience of 207 providers. This is a considerably reduced proportion of responses compared with the previous survey but still represents a respectable level of response for this kind of survey. It was noted that the Northern Ireland Tourist Board (NITB) had also commissioned a survey to the industry the week before this one went live, which may have impacted upon response rates

Scale and Nature of Provision

Location of Providers in Northern Ireland

The 207 providers identified through the research as delivering adventure activities in Northern Ireland are primarily based in the counties as follows:

County	2012	2014
Co. Down	37	60
Co. Antrim	35	64
Co. Londonderry	19	35
Co. Tyrone	5	18
Co. Fermanagh	10	15
Co. Armagh	4	15
Total	110	207

Table 1: Providers by County

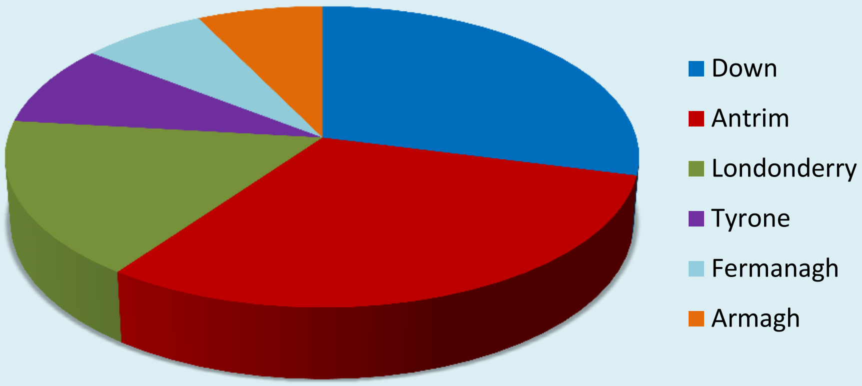


Figure 1: Providers by County 2014

Type of Provision

The breakdown of type of current provision is as follows:

Type of provision	Percentage	
	2012	2014
Commercial	72%	81%
Public Body	4%	6%
Charitable	6%	3%
Voluntary	4%	6%
Other	14%	6%

Table 2: Type of Provision

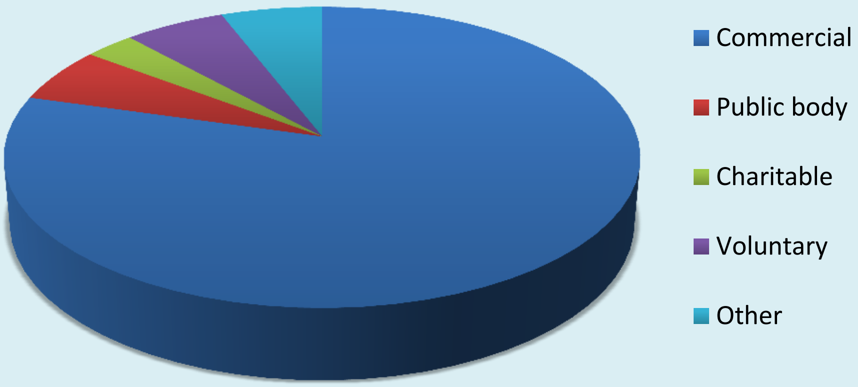


Figure 2: Type of Provision 2014

On the evidence of this survey, commercial providers dominate the provision of activities available to the public at large even more strongly than in the 2012 survey. However, while the commercial sector may be large and growing – many of these providers may be small scale operators. The public bodies and charitable sector while accounting for only 9% of provision may actually have a significantly higher percentage of student days through their provision of services to young people through schools and youth services.

Main Purpose of Provision

The breakdown of the stated purpose of current provision is as follows:

Purpose of provision	Percentage 2012	Percentage 2014
Activity tourism	46%	36%
Personal and social development	19%	25%
Skills development	17%	11%
Curriculum/education	4%	6%
Coach or leader development	0%	6%
Team development	0%	6%
Other	15%	11%

Table 3: Purpose of Provision

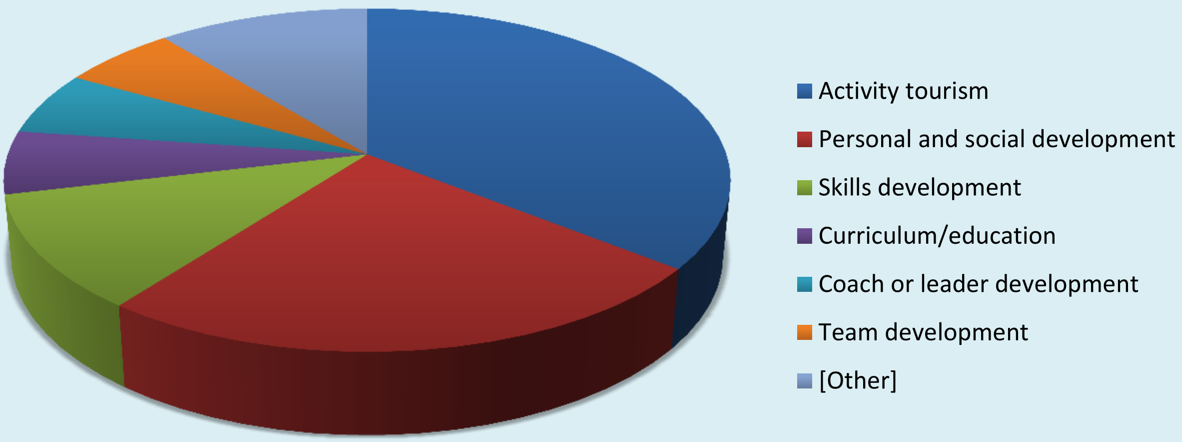


Figure 3: Main Purpose of Provision 2014

A clear majority of surveyed providers continue to see activity tourism as their main purpose of provision.

In 2012 a number of providers offered team development for groups but none saw this as their primary goal. This time, the survey found two providers who now regard this as their primary goal.

Similarly, coach and leader development was definitely occurring in the 2012 survey but was not a stated primary goal. This time, the survey found two providers who now regard coach and leader development as their primary goal.

Most Widely Offered Activities

On a response of 48 providers the breakdown of the most widely offered activity is as follows:

Offered activities	Percentage	
	2012	2014
Paddlesports	42%	39%
Orienteering	40%	36%
Rock climbing	35%	36%
Archery	33%	33%
Hillwalking/mountaineering	31%	44%
Other	40%	33%

Table 4: Main Activities Offered

From the 2014 survey the next most popular activities to be offered are, in descending order:

- Mountain biking
- Combined water/rock activities
- Ropes courses
- Surfing
- Sailing
- Powered water sports

It should be noted that since many providers offer multiple activities the total appears to exceed 100%. Paddlesport and hillwalking/mountaineering remain the most widely offered activities. This time, hillwalking and mountaineering slightly overtook the paddlesports that had led in the previous survey.

Contact with providers tends to suggest that much of the climbing and abseiling activity is conducted on artificial structures.

Alongside the mainstream adventure activities offered there are many others including: caving; geocaching; mountain boarding; paintball; airsoft and other combat games; earthball; bushcraft; jet ski; clay shooting; air based activities; rowing; zorbing; disc golf; water skiing; coastal traversing; hover-crafting; and land yachting.

Age Banding

- 60% of responders worked mainly with those over 18 years.
- 6% of responders worked only with those over 18 years.
- 34% of responders worked mainly with those under 18 years.
- 0% of responders worked only with those under 18 years.

Total Volume of Activity Provision

On a response of 35 (31 in 2012) providers the reported total annual volume of individual activity sessions provided is as follows:

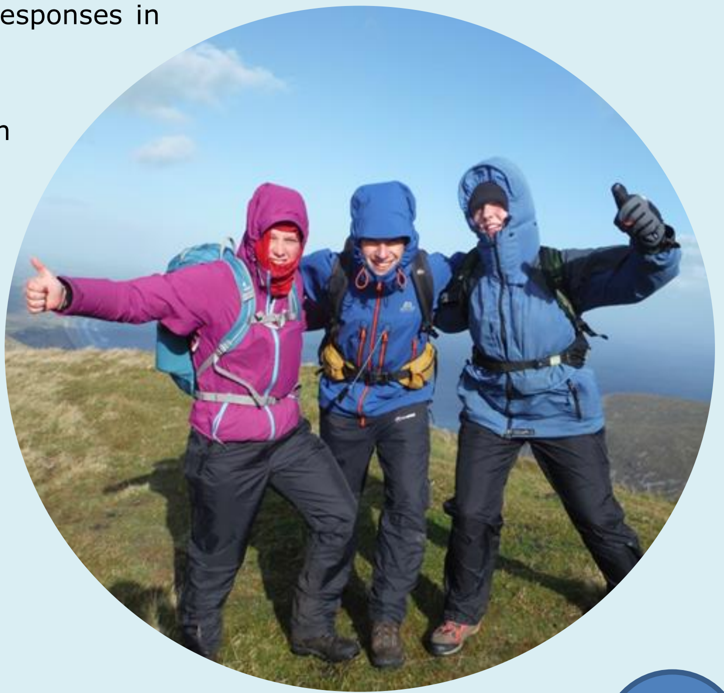
Year	Person Activity Sessions Under 18s	Person Activity Sessions Over 18s	Person Activity Sessions TOTAL
2009	22,694	20,916	43,610
2010	28,893	22,913	51,806
2011	32,920	28,153	61,073
2012	52,180 *46,231**	17,197 *15,237**	69,945 *61,971**
2013	52,106 *46,166**	14,585 *12,922**	64,299 *56,969**

Table 5: Activity Provision

* To make year-by-year comparisons more reliable, the figures for 2013 and 2014 in italics represent the figure from the survey scaled down by a factor of 31/35 (0.886) to take into account the higher level of survey responses in 2014.

The data shows clearly that volume of person activity sessions for under 18s remained almost constant from 2012 to 2013, whereas for over 18s the volume declined by 18%.

One must be cautious in comparing the results of two different surveys of this information. Each survey has been completed by different organisations, with some overlap.



It is therefore problematical to compare the two sets of results since those results may be heavily skewed by, for instance, a single large volume provider.

On the face of it, the data seems to show a strong growth for the under 18 sector and some wasting away of the over 18 sector. This may be an artefact and not necessarily representative of reality.

It is much more reliable to take the average figure from 35 responses in the recent survey for the total number of activity sessions – 69,945 in 2012. This represents an average for each provider who responded of just under 2000 activity sessions. If that level of activity is representative of the whole sector as listed on the database then the total annual activity is 207 x 2000 = 41,400 activity sessions.

It should be noted that the chart below combines the results of the 2012 and 2014 surveys, using scaled data for the latter.

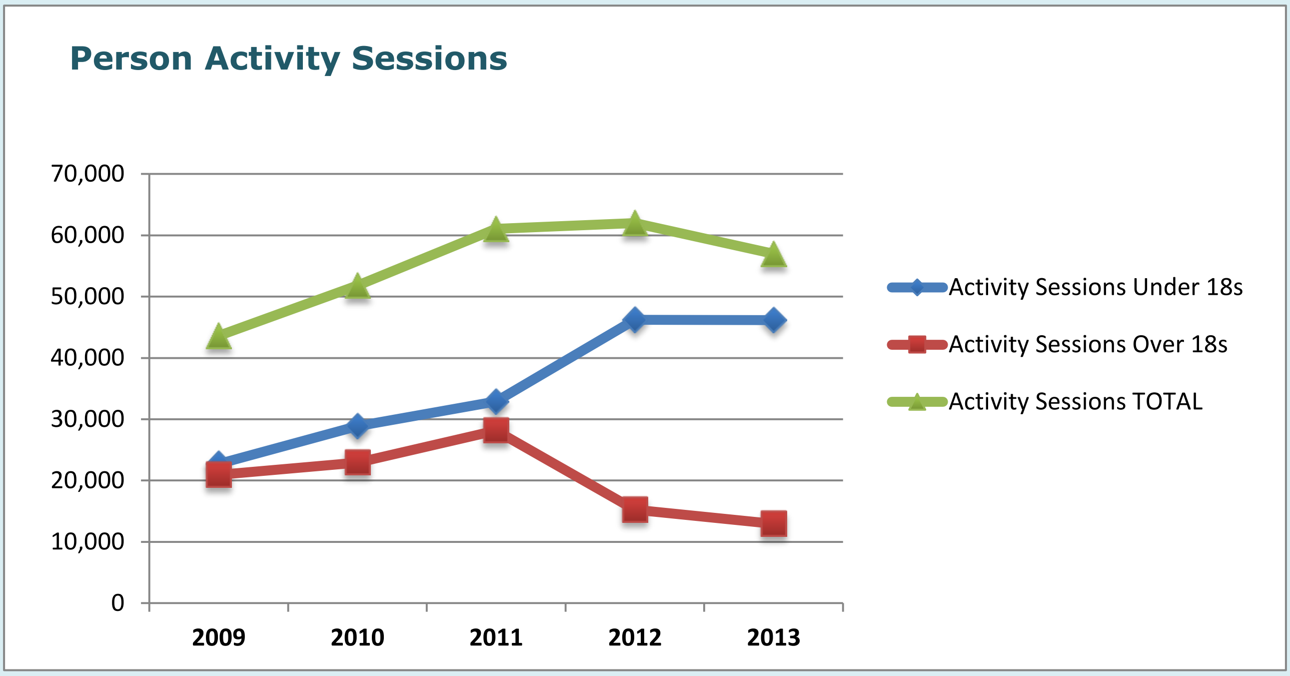


Figure 4: Person Activity Sessions

Staffing

The Number of Permanent and Seasonal Staff

On the basis of 22 (34) responses, the 2014 survey indicates that from 2012 to 2013 the permanently employed staff complement remained fairly steady but numbers of seasonal and freelance staff declined by about 25% for seasonal staff and 16% for freelancers.

Year	Permanent Staff	Seasonal Staff	Freelance Staff	Total Staff
2009	72	36	96	204
2010	89	32	138	259
2011	121	72	177	370
2012	100	88	165	353
2013	103	70	138	311

Table 6: Staffing Levels

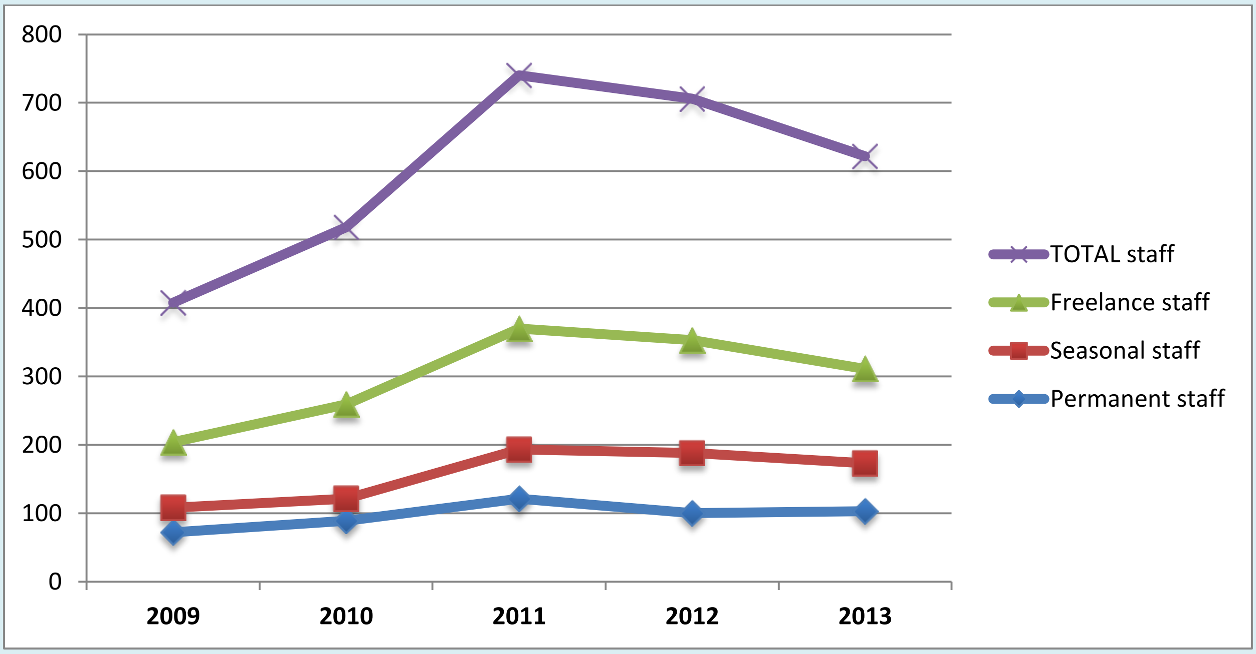


Figure 5: Staffing Levels

Completing an exercise in extrapolation as in the previous section gives an average permanent staff complement of 4.9 staff (per provider). Across the whole sector this would suggest that 207 x 4.9 = **1020 staff are employed in permanent jobs.**

Staff Qualifications

There were 27 responses to the question in the survey on staff qualifications and contains some complex information.

There are few significant changes from the data collected in 2012, suggesting some continuity in the arrangements in use. The data makes it clear that the sector surveyed tends to follow industry norms in the way that different grades of staff are qualified:

In broad terms the data suggests:

- 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
- High levels of in-house training are reported (70%)
- The proportion of lead instructors reported as only holding basic in-house qualifications has decreased
- However, a small number of people at director and supervisory levels are now reported as also only holding basic in-house qualifications

The latter observation may reflect sectors where coach or leader qualifications do not exist or are not widely held, such as in combat games, coasteering and bushcraft.

Safety Practices, Regimes and Policies

Near Miss Reporting

In 2012, 80% of providers reported that they have a system for recording near misses. In 2014 this figure was 78% - substantially the same.

'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. It is disappointing that there is no indicated erosion in the 20% or so who have no system. However, the total number of near misses reported in the survey is as follows:

Year	Near Misses
2009	9
2010	15
2011	20
2012	18 *27**
2013	18 *27**

Table 7: Near Misses Recorded

23 responses to this question were collected in 2014, 35 in 2012.

* Again applying a scaling factor of 35/23 to render the 2013 and 2014 data more comparable with previous years are shown in italics.

The previous comments, on the difficulties of comparing different sample groups, still apply but the data tentatively suggests a higher level of reporting of near misses – a favourable trend if accurate.

Reporting of Significant Injuries

On the basis of 26 (34 in 2012) survey responses, the number of serious and significant injuries reported is as follows:

Year	Serious and Significant Occurrences
2009	9
2010	15
2011	20
2012	18 *27**
2013	18 *27**

Table 8: Serious and Significant Occurrences

*Scaling (34/26) is again applied in italics

These totals suggest a small increase in the total rate of serious and significant incidents. However, we included separate reporting in each of these categories in the 2014 survey. These clarify the situation:

Year	Serious Injuries	Significant Injuries
2012	0	5
2013	1	5

Table 9: Serious and Significant Injuries

Of the 10 incidents reported, only one is judged as serious ("threat to life or permanently disabling"). It is important to resist extrapolating this to the whole population – a single report is simply not representative of the mass.

External Accreditation

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

Accreditation	Percentage Holding Accreditation	
	2012	2014
Adventuremark	21	29
Orienteering	5	10
British Canoe Union (BCU)	18	18
Royal Yachting Association (RYA)	29	14
British Horse Society	5	7
Professional Association of Diving Instructors	13	10

Table 10: Percentage of Providers Holding Accreditation

Among responders in 2014, there has been an increase in the proportion of providers who hold 'Adventuremark' or the 'Learning Outside the Classroom (LOtC) Quality Badge' and a decrease in those holding RYA accreditation.

Responders in the 2012 survey identified a number of other forms of accreditation including:

- British Sub Aqua Club
- The British Hang-glider and Para-glider Association
- Speleological Union of Ireland
- Bord Oiliúint Sléibhe (BOS), the Training Sub-Committee of Mountaineering Ireland
- Civil Navigation Authority
- British Microlight Association
- British Off Road Driving Association
- Irish Sailing Association
- Coastguard Code of Practice
- Duke of Edinburgh Award Approved Provider

It should be noted that a number of the above schemes use self-declaration against a code of practice and do not involve third party independent inspection of any form. Others are not schemes for providers but simply qualifications for individual instructors. Those reports of, for example, BCU accreditation are very likely to be referring to individual staff qualifications as there are currently no providers holding BCU centre approval in Northern Ireland.

The Future of Accreditation in Northern Ireland

This question was not asked in 2012. In 2014, from a total of 34, responses were as follows:

53% preferred to continue a non-statutory approach.

24% favoured a system of statutory licensing.

15% favoured a compulsory register of providers.

9% preferred to have no accreditation of providers.

It should be noted that there was a continuous shading of options between *laissez-faire* and draconian control of adventure activities, which a survey of this kind cannot reflect accurately.

Public Liability Insurance cover

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

Level of cover	Percentage Holding This Level	
	2012	2014
£1 million	6%	11%
£5 million	57%	45%
£10 million	23%	33%
Other	14%	11%

Table 11: Serious and Significant Injuries

In the 2012 survey 'Other' included:

- Public Body – self-insured
- £3M per passenger

External Technical Experts

There has been a small increase (27% of responders to 33%) in the number of organisations with formal arrangements for sourcing external technical advice on activities. Informal arrangements continue to exist. It is a requirement of external accreditation such as Adventuremark that external technical advice is available.

It continues to be desirable for the sector to be reminded of the value of and the possibilities in this area.

In-house Training for Staff

This has remained constant with around 70% of providers arranging in-house training.

General Safety and Risk Assessment Policies

85% (92% in 2012) of providers responding reported that they have such systems in place.

85% (90% in 2012) reported having specific activity and/or site based risk assessments.

The small decline in each is not statistically significant.

However, it is a matter of concern that there are still some providers who do not seem to have general policies regarding such fundamental pillars of safe practice.

Confidential Medical Declaration

48% (81% in 2012) of responders report having a system of collecting confidential medical information from participants. It is worrying to see such a drop in what many would regard as a standard feature of all activity provision.

Without it, how do providers know if participants are suffering from diabetes, epilepsy, heart disease, peanut allergy, and so on?

Parental Consent

52% (84% in 2012) of responders indicated that they have arrangements for obtaining formal parental consent for participants under 18 years of age. It should be remembered that some responders do not work with the under 18 group.

However, this is another concerning statistic that there could be providers offering activities to under 18’s without obtaining formal parental consent which again is seen as a standard feature of all activity provision.

CONCLUSIONS

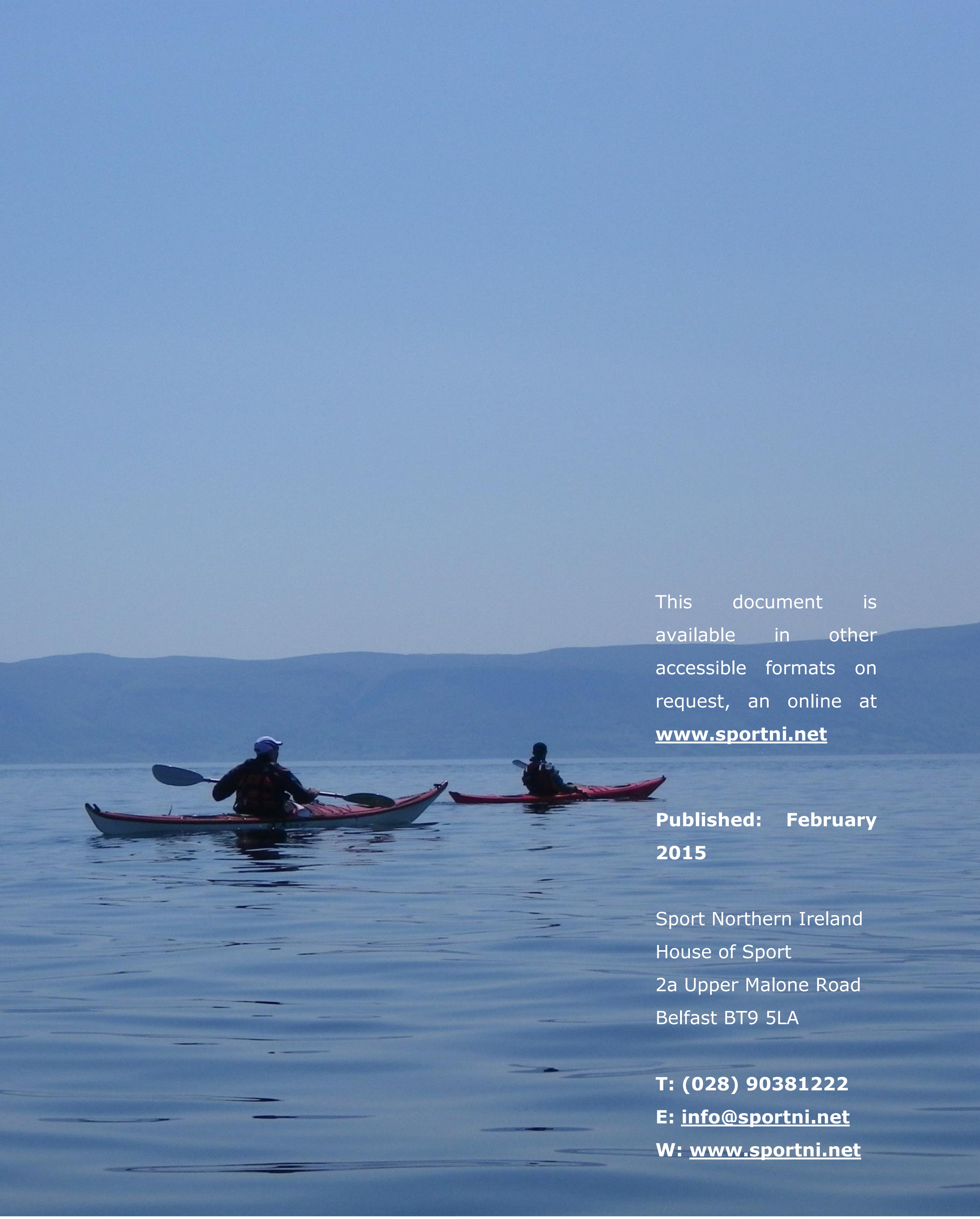
Gratitude is owed to those who took the trouble to respond the survey and to Outdoor Recreation NI for their work in updating the database on which the survey was based.

There are very real limitations to this kind of survey which although provided a reasonable response rate – there may be specific reasons why some providers would choose either to or not to complete it which could skew the results. A 23% response rate, while reasonable, may not be entirely representative of the industry and so care must be taken in using this information.

With that caveat stated, the survey has indicated a number of noteworthy features in the sector during 2012 and 2013:

- The provider database has grown by almost 100% since it was first compiled in this form in 2012.
- This is far from saying that the level of provision has doubled in this period but there are certainly more providers, and more providers who have emerged from the shadows.
- The steady growth in employment levels within the sector has flattened for permanent staff and declined for freelance and seasonal staff.
- The data shows a continuing increase in the volume of activity sessions for the under 18 group, but a decline over the same period for the over 18 group.
- A broad estimate suggests that over a 1000 individuals may be in permanent employment in the sector.
- The data suggests tentatively that there may be 40,000 activity sessions delivered each year in Northern Ireland.
- The occurrence of serious incidents is now identified as being at a low level within the total number of reports.
- As might be expected from the support and encouragement given by Sport Northern Ireland, the number of holders of Adventuremark has increased.
- 53% of those responding preferred to continue a non-statutory approach to accreditation.
- 24% favoured a system of statutory licensing.
- Others, in smaller numbers, supported compulsory registration or no accreditation.

Recent work by Sport Northern Ireland and others have supported Adventuremark and facilitated the sharing of good practice information. As the body of providers becomes larger and better linked, there are good opportunities for the industry to work co-operatively for its own development and improvement.



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Published: February 2015

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