

EXPEDITION PROVIDERS IN THE UK A REPORT ON THE IMPACT OF COVID-19

as at July 2020

EXECUTIVE SUMMARY

Closure of schools, closure of all but essential business and international and domestic travel restrictions has meant that there are now no extended residential expedition experiences available for young people aged 16 to 20 years. These young people are denied the opportunity to gain essential personal and social skills that will better take them into adulthood, higher education and work via the platform of expeditions. These generations will have this loss of opportunity for at least the next two years, and in all probability longer.

Closure of commercial provision is threatening the future of expedition providers. By the end of June 17% had closed, and most have had little or no income since March. There is little, if any prospect of income until at least 2022 to sustain this sector of provision.

Teachers and voluntary organisations are not in a position to meet the potential demand for the expedition experience as the country emerges from the restrictions of Covid-19. Collectively, they possess too little of the essential manpower and expertise.

Clear direction and coordinated guidance from across Government departments is essential to ensure that:

- emergent young adults have the benefit of experiential learning through the expedition experience;
 - commercial expedition provision, with little prospect of income until 2022, is protected to provide these learning experiences;
 - technical staff and leaders can retain and renew qualifications to continue to work;
 - an extended residential experience and experiential learning are retained and be part of the core curriculum;
 - voluntary and charitable organisations can assist in the provision of this important aspect of learning by being able to compliment the provision of commercial organisations;
 - there are enhanced opportunities to support teachers' involvement and opportunity to lead their own expeditions.
-

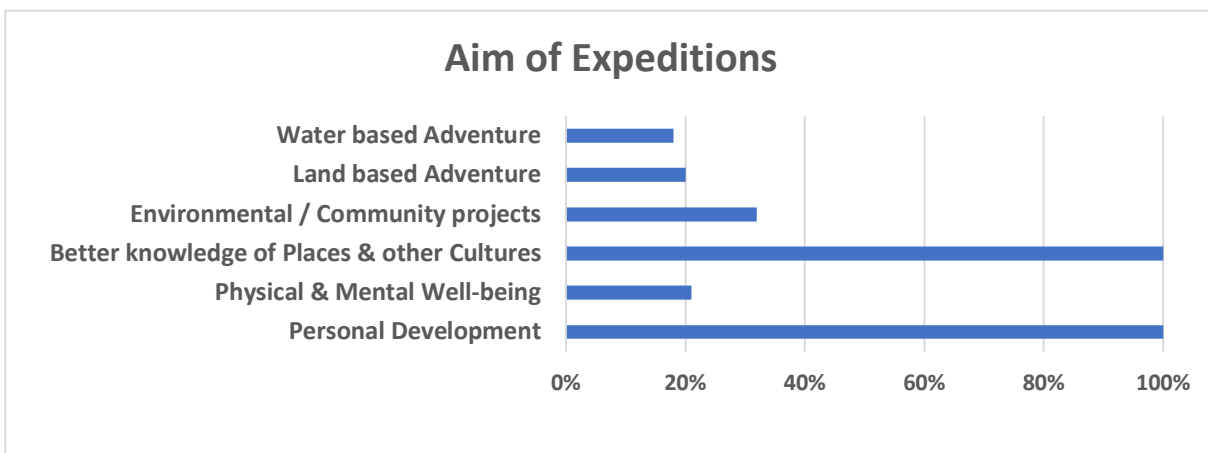
The impact of Covid-19 has been dramatic across all aspects of outdoor and experiential learning but possibly none more so than in the youth expedition provision sector.

The expedition experience, as an inspiring framework for outdoor recreation and as an experiential learning medium, is relatively small in comparison with other forms of outdoor provision. Nonetheless it is an extremely effective sector developing in young people the key core skills and personal qualities sought by all employers and universities in today's highly competitive and demanding world.

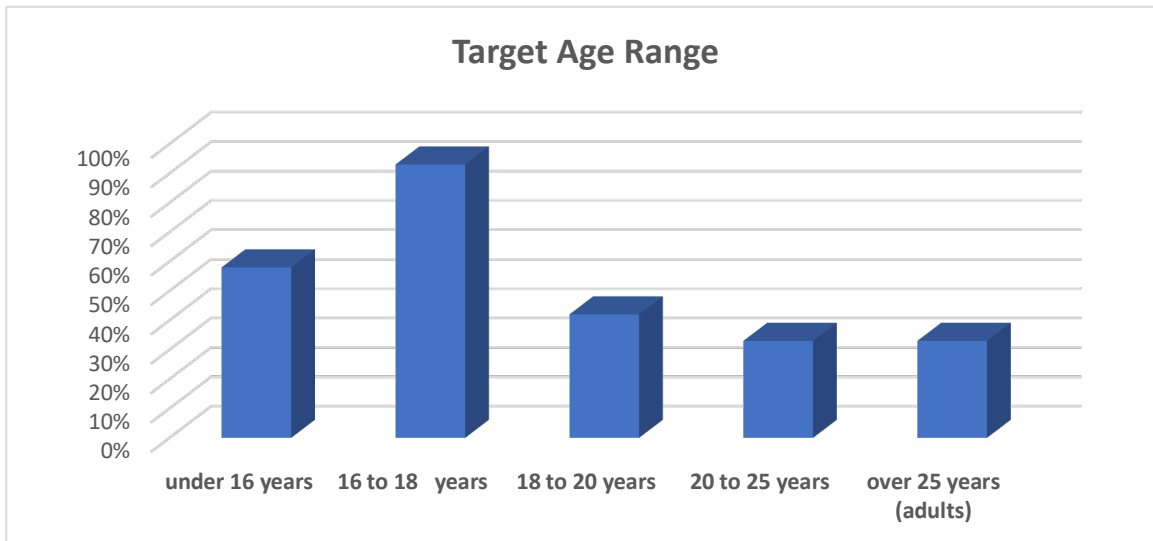
If we are to ensure that this vital aspect of the learning process is not lost for this and future generations, we need to have a clear understanding of the immediate impact of the Coronavirus on participation. We need to recognise both the future longer term consequences for the provision of this vital sector and the implications for balanced youth development and leadership.

Young Explorers' Trust (YET), the UK's national association for youth exploration societies and expedition providers, has surveyed a wide range of organisations, varying in both size and character, to establish a better understanding of the situation. YET wishes to be able to inform its membership and to present the impact and concerns of the youth expedition sector to government departments and other education organisations.

To do so, it is important to establish what providers currently perceive as the aims of their expeditions with young people.



The majority of providers agree that the primary aim is the personal development of young people and increasingly to address their physical and mental well-being. This they endeavour to do using the framework of land or water based adventurous activity or community and environmental projects. All recognise that additionally, through visiting other countries, they increase awareness and understanding of other environments and cultures of indigenous people, a vital ingredient for young people maturing in a world of global economies.



From the survey responses, it was clear that the main target age range is the 16 to 18 year olds (93%), closely followed by those immediately under 16 years of age (58%). The peak of the target age range is at the most crucial years for personal development when young people mature into adulthood and need exposure to practical and social skills that will endure throughout their lives.

Only a minority of providers also offer the expedition experience to adults, which for the purpose of this survey is defined as those over 25 years. Overall, the majority make provision for the wider 15 to 25 age groups, but often vary the nature of the expedition activity according to the participants' age category.

Expedition providers offer destinations throughout the world with many concentrating initial training activities in the UK before travelling abroad.

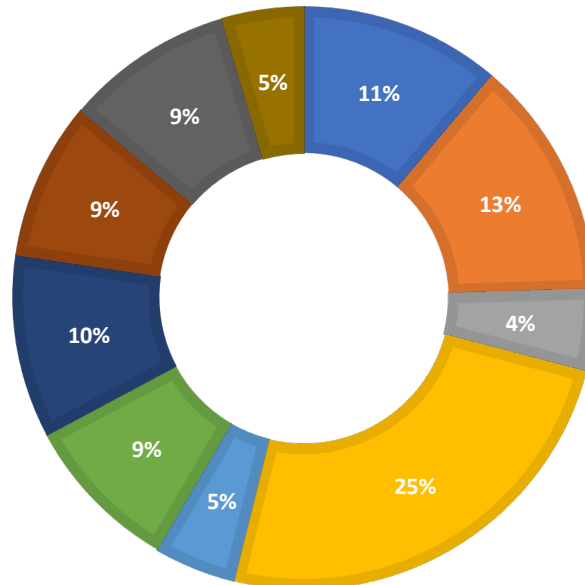
The low cost of airfares in recent years and accessibility to previously remote places has enabled youth expeditions to visit a wider range of destinations for a 3 to 4 weeks period. Such places were formerly the preserve of longer (6 to 8 weeks) expeditions which were often research based and from Higher Education organisations.

Now it is common for 16 to 18 year olds to have been to African countries south of the Sahara; to Peru, Ecuador and Costa Rica in South America, and the Asian and far Eastern countries of India, Sri Lanka, Nepal, Thailand and Cambodia. These were all recent expedition destinations of more than 50% of providers.

The further eastern countries of Europe, such as Greece, Romania, Czech Republic and Poland, are also popular. These destinations are often targeted for the younger age range and for shorter 2 weeks expeditions, or for ventures with a more curriculum-based purpose.

EXPEDITION DESTINATIONS (IN THE LAST 3 YEARS)

- The United Kingdom
- Europe (including Iceland)
- Africa (north of Sahara)
- Africa (south of Sahara)
- Australia / New Zealand
- The Far East
- Asia (India /Nepal / Sri Lanka)
- North America
- South America
- Other Places (e.g Antarctica, Greenland, Svalbard)



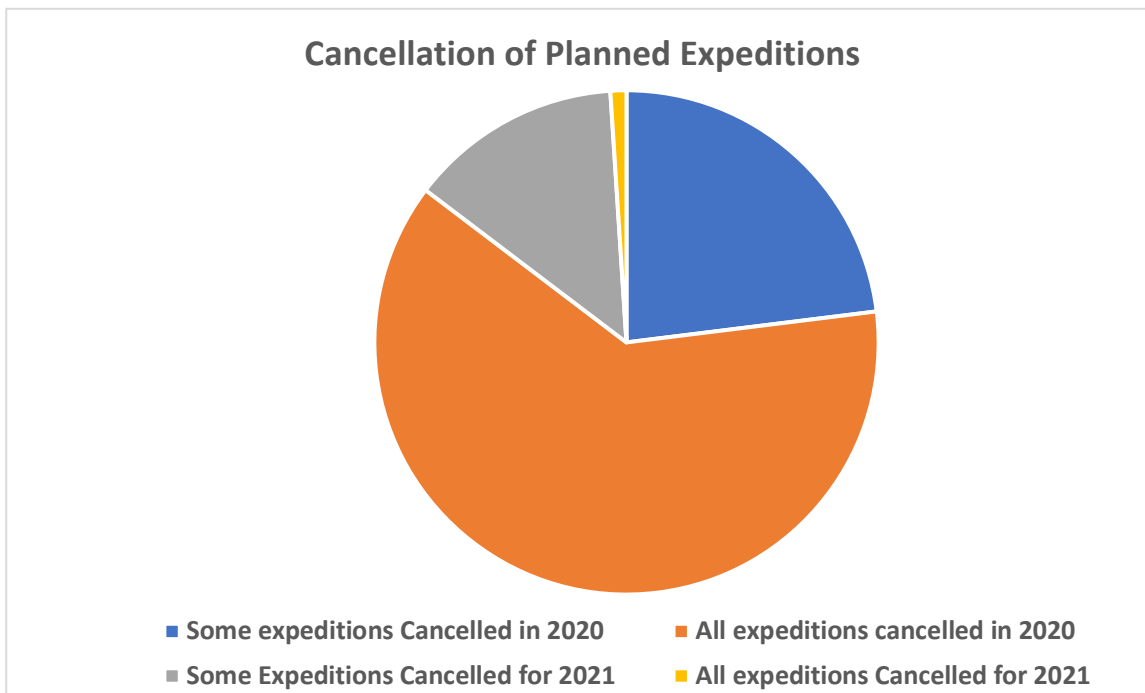
Although travel is now faster and more readily available, the cost of overseas expeditions is nonetheless quite considerable. Financing most expeditions necessitates students to fund raise and frequently includes large contributions from family sources – income or savings. Generally, this planning and preparation has to be committed to some 18 to 12 months before going on the actual venture.

Expeditions tend to be concentrated in the months of June, July and August, and to a lesser extent in April and October –these times coinciding with school holidays. Whilst making useful time of students' vacation periods, it does create particular peaks of income stream for many providers. Large numbers of ventures at these times also often strains the local resources, both human and facilities / locations, of the more popular destinations.

For the host country, these expeditions, often to more remote and impoverished areas, form an important part of the economy of these communities as local travel, accommodation and resources are utilised. They frequently provide the major source of seasonal work and income.

Regrettably these popular expedition destinations are also high on the list of those countries with extensive infection of the current coronavirus pandemic. As such, they are no longer accessible in 2020, nor most probably for the immediate or medium-term future.

The immediate impact of the spread of Covid-19 has been that all providers have cancelled some expeditions in 2020, with 73% cancelling all expeditions. As of June 2020 some providers still hoped that some expeditions planned for late in 2020 may be able to go ahead.



Because of the length of time it takes to launch, plan and fund an expedition, as well as to ensure that suitable resources in the host country are available and safe to use, this cancellation and shut down by providers is being extended to include expeditions for 2021.

Already, 16% of providers have cancelled all of their planned expeditions in 2021. A further 25% of providers have cancelled between 5% and 50% of expeditions planned for 2021.

Expedition providers are acting responsibly and 66% have announced termination of expedition contracts with a full refund to participants.

34% of providers are making a partial refund on a sliding scale dependent upon irretrievable financial commitments already made and expenses incurred thus far in planning and preparation, which are linked to the remaining time before departure of the venture. The availability of a participant's refund through insurance is also a key factor in these arrangements.

Remaining positive in their outlook, a number of providers have offered to transfer bookings to a similar venture in 2021. However, the indications are that few participants are taking up this offer. From the limited data available, this appears on average to be about 1 in every 8 booked places. These cancellations mean a vast financial loss for the expedition providers, many of whom have had no, or very limited, income since the 2019 season.

It is not possible to estimate the overall financial loss to expedition providers. However, from the data supplied in the survey, projected losses vary between £130,000 to in excess of £1.5 million depending upon the size of the organisation.

The following figures apply to commercial providers and do not include cancellation costs incurred by charitable organisations or individual school providers:

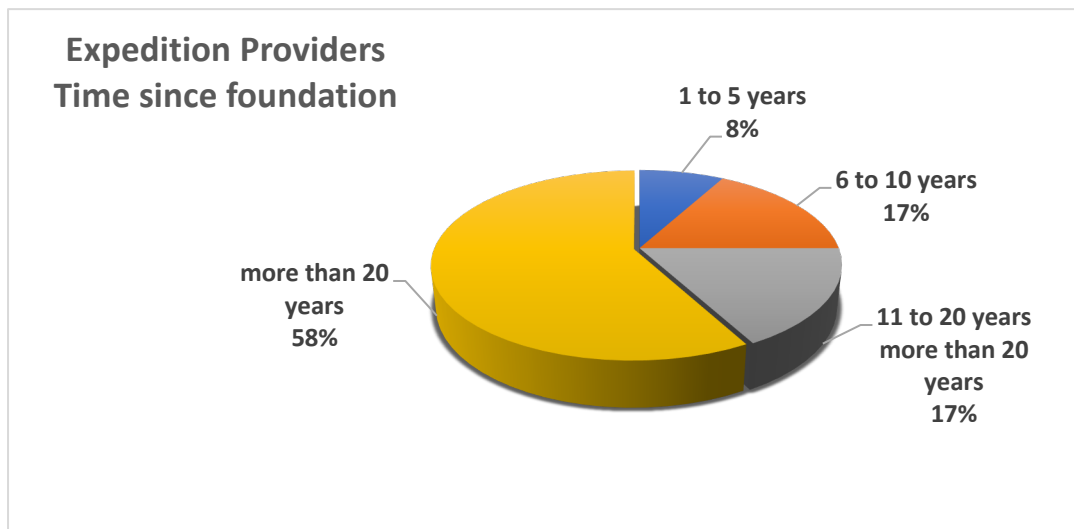
- The average estimated lost income for 2020 up to July is circa £120,000;
- For the period July to September 2020 the average estimated lost income is £520,000;
- For the rest of 2020 after September the average estimated lost income is £150,000;
- It is projected that 2021 will see an average loss of income per provider in excess of £420,000 – based on bookings already secured.

When considering the impact of these figures, it should be noted that the period March to June is the prime window for the conversion of proposed expeditions into actual bookings. In 2020 this did not happen because of lockdown, furloughing of staff, and closure of schools.

It is therefore most probable that only a few, if any, expeditions for young people will happen before 2022, and in all probability much later. A wide age range of young people for several years to come will not have the opportunities such learning experiences bring to their development and are a cornerstone for social and personal qualities as they emerge into adulthood and a working life.

The impact of Covid-19 has not only meant the lack of an expedition experience for the young people and heavy financial losses for providers it has also impacted fundamentally on the work-life of those engaged in all areas of making that provision:

- 17% of providers have made staff redundant.
- 33% of providers have placed the majority of staff on furlough whilst retaining a core team to enable provision to re-start when travel destinations' lockdown is lifted.
- Already by the beginning of July, 17% of providers have ceased trading, some permanently. More have indicated that they are likely to do so soon. A few, if part of a larger organisation, have indicated that they will review the situation in 2022.



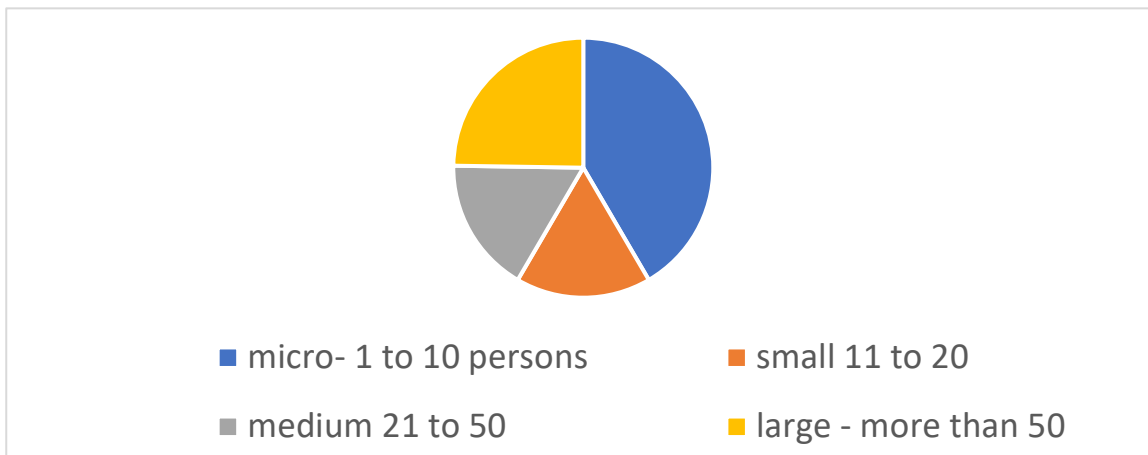
The survey demonstrated that 75% of providers have been operating for more than 11 years, and a majority of these for more than 20 years. Clearly, many have taken time to carefully build up expertise in their field, developing sound policies and procedures for safe practice. They have attracted, trained and sustained a highly qualified and competent team of staff and leaders.

In an instant, Covid-19 has meant that many of these critically placed staff have been made redundant or furloughed, with little prospect of future work until 2021 for office-based staff and until 2022 at the earliest for those operating in the field.

It is unrealistic to expect these specialists to stay or take the risk of returning to an area of work where the future is at best uncertain. Reactivation of their jobs is, in all probability, most unlikely to happen if their present employer does not find funding to sustain their operation.

This established expertise has taken a long time and considerable specialist resources in its formation. The inevitable departure of highly competent staff and their re-orientation towards more stable employment in other unrelated sectors means that providers will very probably be unable to resume business in an acceptable manner for the safe and responsible delivery of expeditions for young people.

Most providers are small organisations as measured in terms of persons directly engaged in the UK in making the provision (administrative, training, and leadership personnel). It is not possible to estimate the overall number of people engaged in this important work but the survey indicated that nearly half of the organisations are single lone-working operators (48%), or with no more than 10 people in their organisation. Only 25 % of those responding to the survey have more than 50 people engaged in this work.



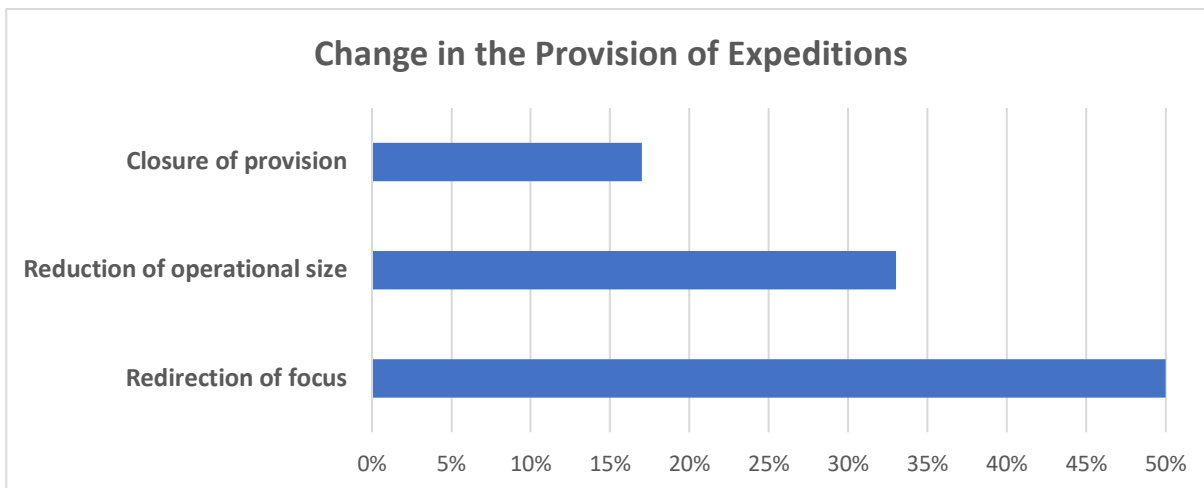
In order to retain a possible future for their established businesses, providers have engaged with the Government furlough scheme for staff, have sought small business grants and become part of the “Bounce Back Loan” scheme. Many have indicated that they would like to see the furlough scheme extended through the winter, albeit at a reduced rate.

This is a vital skilled workforce that needs financial assistance in the form of grants and continued furloughing to reflect the loss of work resulting from cancelled expeditions and further anticipated restrictions to income in 2021 and possibly beyond.

The size or operational scale of an organisation is reflected in the number of expeditions it provides. Of all expeditions provided, 42% are by an organisation delivering 5 or fewer ventures each year, with a further 33% by those offering 6 to 15 expeditions. The remaining provision is by the larger, often multi-national, organisations offering more than 25 expeditions each year.

It should be noted that the closure of even one small provider could have a disproportionate impact on the overall availability of the range and type of expeditions offered, thereby limiting the potential appeal and attraction to a wider range of young people. This is particularly so as providers tend to focus on one or two especially tailored styles of expedition such as land or water based adventurous activities, community or environmental projects, as their unique platform for delivering personal development and the physical and mental well-being of participants.

The impacts of Covid-19 indicated above will inevitably mean change in the provision of expeditions for young people.



Immediately preceding the Covid-19 pandemic, two regional expedition provider organisations, run entirely on a voluntary basis, ceased to operate. They no longer had either the resources or individuals able to commit the time to organising expeditions and were no longer attracting sufficient participants to operate at least one overseas expedition each year.

As far as it is possible to ascertain there are currently very few charitable organisations providing annual overseas expedition experiences for young people. Whilst a few schools organise their own overseas ventures most depend upon the support resources, leadership skills and organisational structure of a commercial provider for some, if not all, of the provision of an overseas expedition.

At the time of the survey, 17% of commercial providers responding indicated that they had already closed or were in the process of immediate closure. To try to survive the rigours of the pandemic, 33% of providers indicated that they will reduce the scale of their operation. Inevitably this will mean fewer expedition opportunities for young people and less choice in the scope of activities.

What will happen to the schools these providers have worked with? Given other pressures on the education system and the call to focus on core curriculum work, coupled with the Government's current advice that educational visits should not take place, it is very probable that the culture of enhancing the broader aspects of education of young people through the expedition experience will be lost.

Already 50% of providers are aiming to re-direct the focus of their provision to destinations closer to, if not also within, the UK. Such destinations will cost less than many destinations further afield, and potentially be envisaged as carrying less risk. Several providers have made the key point that parents will need to be realistic as to the actual risks young people will be exposed to by taking part in an expedition, and that the on-going presence of Covid-19 will mean an enhancement of risk assessments, including a need to ensure proximity to good, high quality and safe medical facilities. These are not always available overseas near to the traditional and suitably challenging expedition locations.

Providers were unanimous in wanting the Government to provide urgently clear, workable guidelines for overseas travel.

In the longer-term, providers expressed a view of the necessity for change. These included:

- adjustment to how global travel is organised for groups;
- re-establishing trust in host countries that expeditions will not bring greater risk of contamination and exposure to Covid-19;
- stricter medical screening of participants and staff;
- the need for more and accurate personal data collection, especially for medical records.
- the need to rapidly catch-up with providing specialist qualifications for staff that through inactivity will no longer be valid;
- cessation of expeditions in some destinations, especially those further away from UK and / or more remote locations;
- a re-evaluation of community projects and refined risk benefit analyses;
- the need to raise the profile of the educational benefits of the expedition experience;
- the aspiration to see the extended residential experience, viz an expedition, as an educational 'right of passage' for every young person and not just for those who can afford it.

Most interestingly, a number of providers saw the situation in positive, and even advantageous terms:

- fewer providers, so less competition and need to "chase" bookings;
- by adjusting destinations to include the UK, helping domestic remote communities and boosting their economy and businesses;
- introducing more sustainable and responsible tourism globally.

The concluding overall impression given by providers responding to the survey is that Society does not understand sufficiently the educational benefits an expedition experience can bring to the development, mental and physical well-being of young people.

There needs to be a greater recognition of the transferable life skills and team-work, be it as a member or leader that young people gain through participation in an extended residential expedition experience.

The sector needs to campaign to emphasise the importance of the way the extended expedition experience develops resilience, confidence, and skills for work in young people. These will prepare them well for their future where employability, mental health, risk awareness, and enhanced environmental awareness are likely to be larger social issues.

Perhaps with a retraction of the expedition focus to the UK and nearby destinations young people will develop a taste for safe, well planned travel locally. This could then give them the incentive and confidence as they grow into adulthood to encompass an ever-widening range of experiences, destinations and cultures; a true, proportionate life-long passion and involvement.
