

ENVIRONMENTAL SCAN 2015

Sport, Fitness and Recreation







Acknowledgements

This Environmental Scan has been produced by Service Skills Australia with the assistance of funding provided by the Australian Government through the Department of Education and Training.

While this Environmental Scan is published by Service Skills Australia (the Industry Skills Council for the service industries), it is endorsed and owned by the service industries. Service Skills Australia would like to acknowledge the significant contribution of its Industry Advisory Committees in the preparation of this document.

March 2015

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Australian Government
Department of Education and Training



KEY MESSAGE

from the CEO





Our findings this year describe an industry facing down powerful forces beyond its control.

Natural resources are becoming scarcer and more expensive to use, forcing the industry—particularly the parts of it that rely on the outdoors—to rethink how it delivers its services.

An increasingly diverse population demands equally diverse approaches to participation, which means new products and workers with new skills. People are busier, which makes it harder for them to find the time to volunteer like they used to. At the same time the requirement that sport, fitness and recreation be delivered in an ever more professional way means even volunteers need greater professional development, and some roles that used to be filled by volunteers now need professionals.

These pressures come at a time when the sport, fitness and recreation industry might never have been more important to the country. As a people we are getting older, less active and more overweight. The industry has long been recognised for the role it has to play in preventative health. It's not just physical health the industry promotes but also mental health and societal health; participation in the industry improves social cohesion and inclusion, especially among those who can feel the most excluded.

Against the backdrop of these pressures, the industry needs to provide more because its customers expect more. Consumers across the board want more for less and they want it to be of a greater variety and more personalised. Workers expect more too, if they are to be encouraged to come into or stay in the industry. They want full time, year-round jobs in an industry that has traditionally been seasonal and casual.

This Environmental Scan expands on these issues and describes the encouraging ways in which the industry is already adapting to them. There is more to do and training is at the heart of it: training that raises the level of professionalism in the industry; training that gives the industry the ability to fulfil its role in creating a healthier Australia; and training that offers people meaningful careers in an industry soon expected to be one of Australia's top twenty sectors of employment.

Yasmin King
CEO, Service Skills Australia



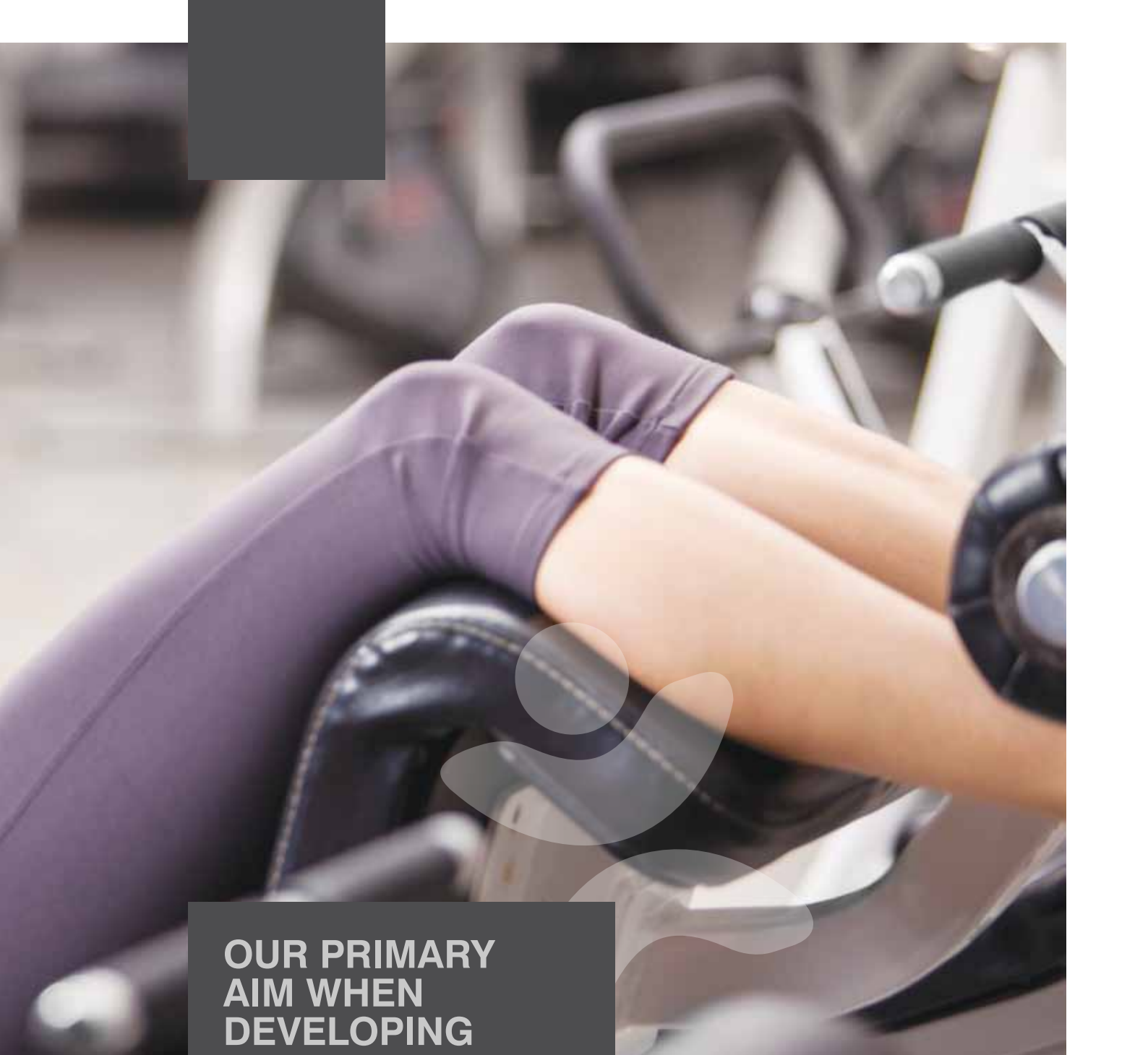
ABOUT

Service Skills Australia

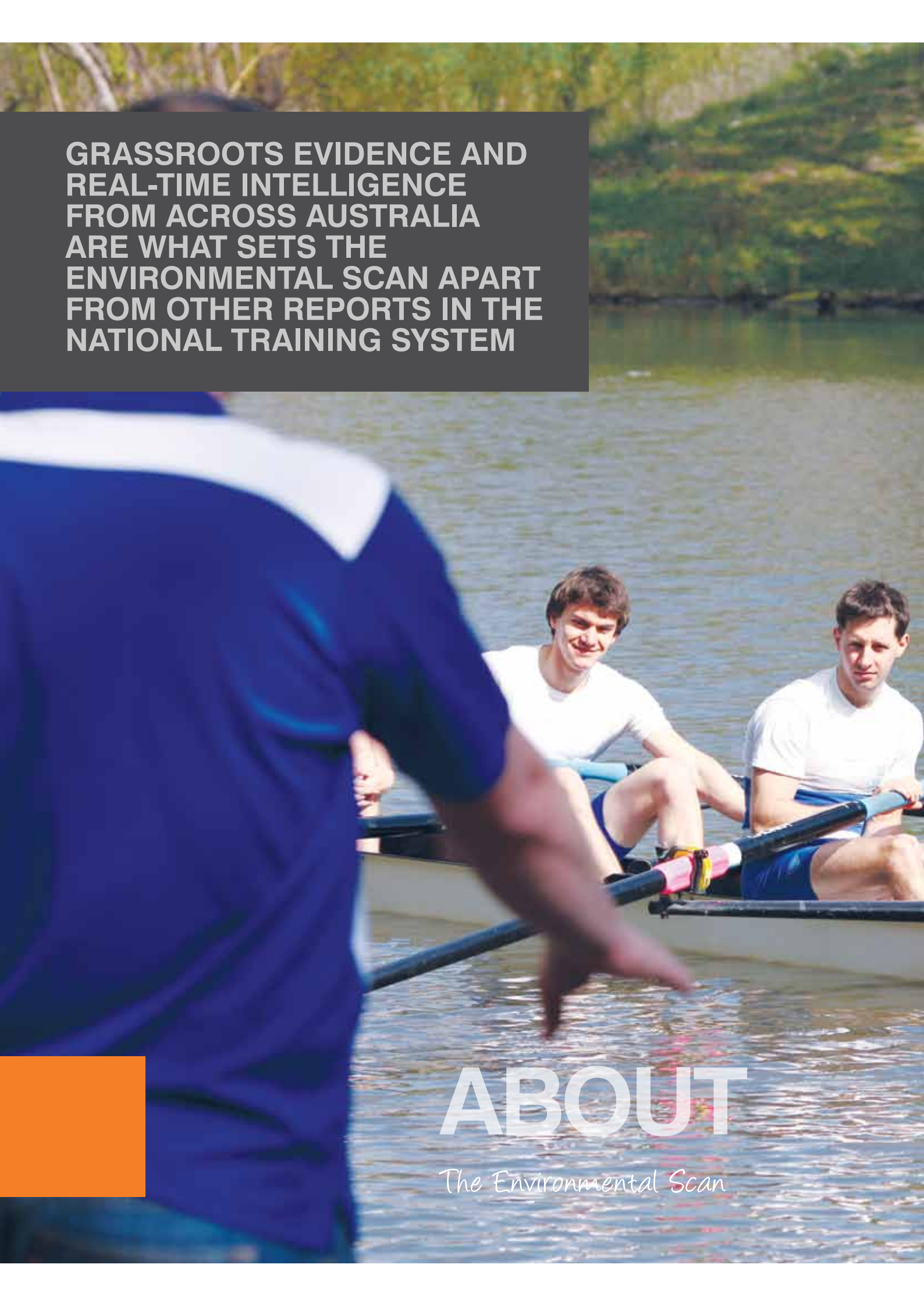
Service Skills Australia supports skills and workforce development in the service industries. These include retail and wholesale, sport, fitness, community recreation, outdoor recreation, travel, tourism, meetings and events, hospitality, accommodation, restaurants and catering, holiday parks and resorts, hairdressing, beauty, floristry, community pharmacy and funeral services.

We are a not-for-profit, independent organisation, which supports skills development for our industries.

Our primary aim when developing nationally recognised training is to ensure that training is in step with the needs of employers and industry as a whole. To achieve this, we consult and engage with as broad a range of stakeholders as possible. Our key stakeholder groups are: industry, both representative organisations and individual businesses; training professionals, including registered training organisations and trainers/assessors; industry regulators; and a range of state/territory and federal government bodies.

A close-up photograph of a person's legs in purple leggings pedaling a stationary bike in a gym. The background is blurred, showing other exercise equipment. A dark grey rectangular box is in the top left corner, and a larger dark grey rectangular box containing white text is in the bottom left corner. There are also some faint, overlapping circular shapes in the center of the image.

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A photograph of a rowing team on a lake. In the foreground, the back of a person wearing a blue and white rowing shirt is visible, with their hand pointing towards the water. In the middle ground, two rowers in white shirts and blue shorts are seated in a boat, looking towards the camera. The background shows a calm lake and a line of trees on the shore.

**GRASSROOTS EVIDENCE AND
REAL-TIME INTELLIGENCE
FROM ACROSS AUSTRALIA
ARE WHAT SETS THE
ENVIRONMENTAL SCAN APART
FROM OTHER REPORTS IN THE
NATIONAL TRAINING SYSTEM**

ABOUT

The Environmental Scan



Rapid advances in technology, seismic shifts in global demography and the rise of the conscientious consumer are just some of the factors that have left economists and policymakers recognising the limited relevance of historical trends and data as a reliable indicator of the future.

Attempts to predict industry's future workforce and skill development needs can be particularly fraught as industries continue to evolve, converge or re-locate and as new job roles emerge while others become obsolete.

Leading developed nations are establishing 'early warning systems' to quickly detect the onset of trends and building agile vocational training systems capable of responding to issues once identified. Environmental Scans have been conceived on this basis.

Specifically, the Environmental Scan identifies the macro and micro factors currently impacting on the skills needs of the workforce and its composition, it considers how well the national training system, its products and services and industry itself are responding.

Grassroots evidence and real-time intelligence from across Australia are what sets the Environmental Scan apart from other reports in the national training system. It captures intelligence gathered from on-going visits and conversations with industry, key stakeholders, regulators and, critically, the people doing the jobs across the sectors, who experience first-hand the impact of change. It also draws on a range of topical sources such as the latest industry, enterprise and government research and international developments. As a document in limited size, the Environmental Scan does not seek to capture every issue within every sector. It is a snapshot of a continually evolving story that is intended to alert and inform a wide audience and enhance their capability to act.

This Environmental Scan's formal audience is the Department of Education and Training, although its relevance extends far beyond and continues to be used extensively by state and territory governments, industry bodies, enterprises and many other stakeholders involved in skills and workforce development.

Environmental Scans are produced annually by Australia's Industry Skills Councils as part of their broader role in gathering industry intelligence and undertaking high-quality analysis of the skills needs and profile of the current and future workforce.



CONTENTS



Environmental Scan 2015

Acknowledgements	1
Key message from the CEO	3
About Service Skills Australia	5
About the Environmental Scan	7
Overview of the industry	11
Summary.....	12
A complex landscape	13
Steady employment growth predicted.....	15
Trends	17
Fitness	18
Summary.....	20
Latest intelligence	20
Workforce development needs	23
Current impact of training packages	23
Future directions for endorsed Components of training packages.....	24
Community recreation	26
Summary.....	28
Latest intelligence	28
Workforce development needs	23
Current impact of training packages	32
Future directions for endorsed Components of training packages.....	33
Outdoor recreation	34
Summary.....	36
Latest intelligence	37
Workforce development needs	38
Current impact of training packages	39
Future directions for endorsed Components of training packages.....	41
Sport	42
Summary.....	44
Latest intelligence	44
Workforce development needs	46
Current impact of training packages	47
Future directions for endorsed Components of training packages.....	49
VET responses	51
Work-ready graduates.....	51
Traineeships.....	51
VET policy hotspots	51
Appendices and references	54





OVERVIEW

of the industry



Summary

- Changes in consumer demand and the availability of natural resources are forcing a rethink of traditional models.
- An ageing population and declining health across all age groups has increased the importance of exercise programs.
- New skills are needed to handle a changing population with greater demands.
- The sport, fitness and recreation industry will be Australia's 17th largest employer by 2017.



A complex landscape

The sport, fitness and recreation landscape is complicated. It comprises four industry sectors— sport, fitness, community recreation and outdoor recreation—that are made up of:

- not-for-profits (including volunteer organisations)
- government bodies (local, state and federal)
- commercial enterprises (from large companies down to sole traders like personal trainers).

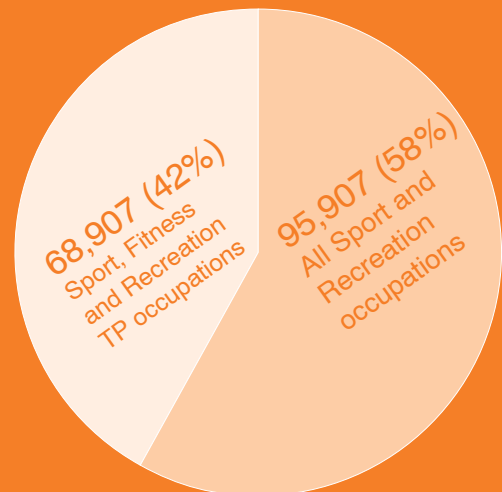
It also overlaps with other sectors particularly tourism, education and health, for example: outdoor recreation overlaps with both the tourism and education sectors; and the fitness sector overlaps with the health sector.



68,907

people are employed in the industries covered by the Sport, Fitness and Recreation (SFR) Training Package, with a total of 95,950 recorded as working in the industry overall.

Employment in the industry



34%

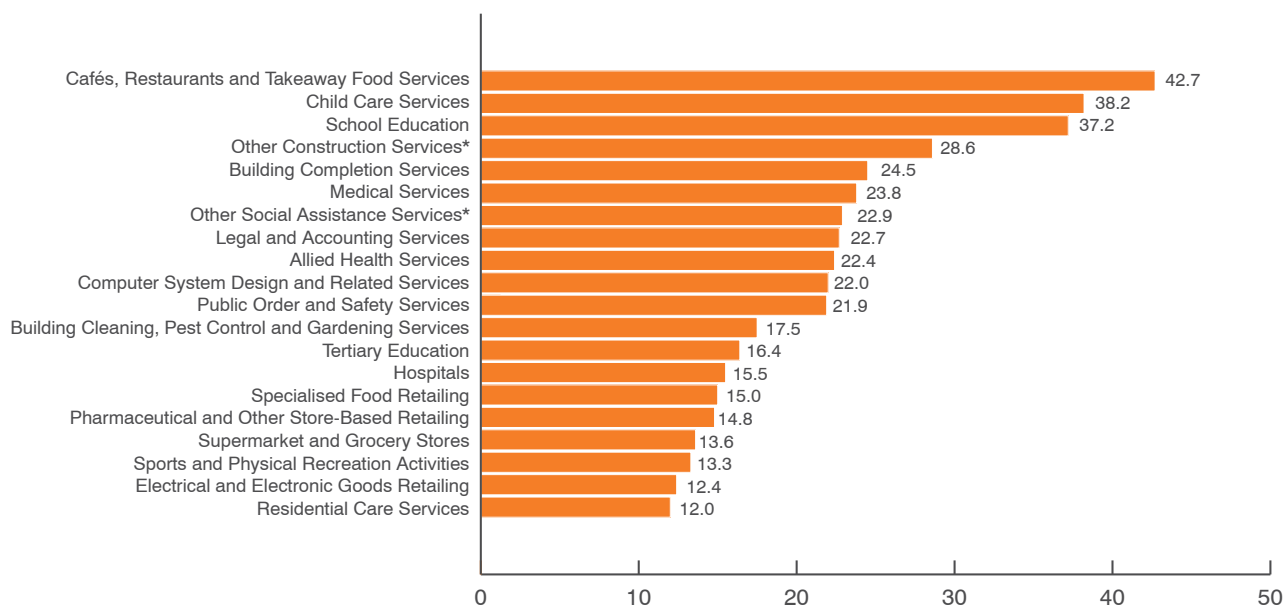
growth in employment in the SFR industry between 2006 and 2011.¹

Steady employment growth predicted

The Department of Employment expects sports and physical recreation activities to be the 17th largest sector of employment by 2017 and that it will contribute to the growth of many other areas, including child care, school education and allied health services. The industry itself expects to continue employing more people but it doesn't expect to continue growing at the rate it has been.

It's hard to get an accurate picture of the workforce, however. People in support roles are not easy to find in the official statistics—and the sector includes a large number of volunteers, up to 14 per cent of the adult population according to the Australian Bureau Statistics (ABS). At the same time, it has also been confirmed that the ABS has stopped collecting sport and recreation statistics which are vital to the industry.

Figure 1: Top 20 industry sectors – ranked by projected growth to November 2017 ('000s)³

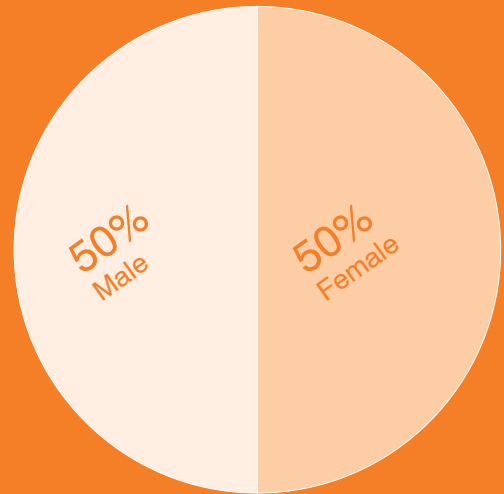


AN INDUSTRY SOON EXPECTED TO BE ONE OF AUSTRALIA'S TOP TWENTY SECTORS OF EMPLOYMENT



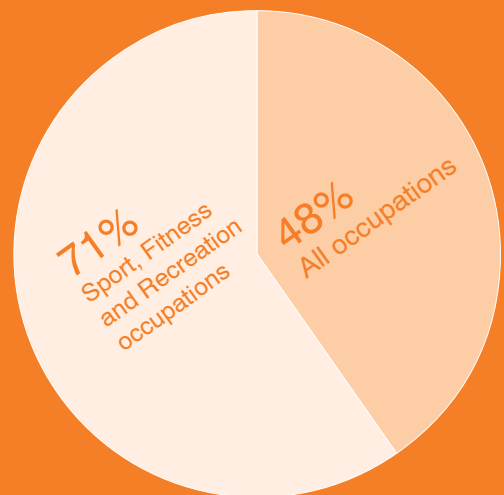
There is a 50/50 gender split overall across the industries according to the ABS Employment in Sport report⁴

Gender profile of workforce



Younger workforce – 71 per cent of the workforce are under 40 years of age, as opposed to 48 per cent for the rest of the working population.

Percentage of workforce under 40 years of age



The workforce is mainly casualised/part time/seasonal workers—according to ABS, 68 per cent claim to be employed on a part time basis.⁵



WITH THE RIGHT KNOWLEDGE AND SKILLS, THE SPORT, FITNESS AND RECREATION INDUSTRY CAN PLAY A SIGNIFICANT ROLE IN PREVENTATIVE HEALTH

Trends

Some global trends are expected to have a major impact on the skills needed by the local sport, fitness and recreation workforce.

More demanding and diverse clients

An ageing and increasingly inactive and unhealthy population makes exercise programs more important than ever for Australians of all ages. In 2012 only 43 per cent of adults met the recommended minimum of 150 minutes per week of at least moderate activity.⁶

Nearly two-thirds of adult Australians are overweight or obese.⁷ Australia is seventh among developed countries for rates of obesity among people over 15 years old.⁸

With the right knowledge and skills, the sport, fitness and recreation industry can play a significant role in preventative health. But to do so, it will need to provide its services at the level consumers have come to expect—that is more personalised, better and faster.⁹

New skills are needed to rise to what is a global mega-trend in consumer behaviour while also fitting in with clients' busy lifestyles, changing health needs and evolving ways of interacting socially.

Technology: threat and opportunity

Technology gives people ways to interact, compete and form communities without being part of a formal sport or recreation club. To remain relevant, sport, fitness and recreation clubs need the skills to incorporate technology into what they offer.

Professionalism and integrity

Previous Service Skills Australia's Environmental Scans have highlighted the need for the industry to become more professional as it moves away from a traditional recreation model. This is challenging when many in the workforce are volunteers, who are hard to retain, support and develop professionally



because of the cost and their availability for training. Traditional forms of professional development such as accreditation are appropriate for some volunteer segments but other forms of training and education need to be developed, particularly for short-term volunteers.

Issues of integrity in sport are well-documented and there is a continued push from government to make more change in this area, especially with regards to governance.¹⁰

Environment and sustainability

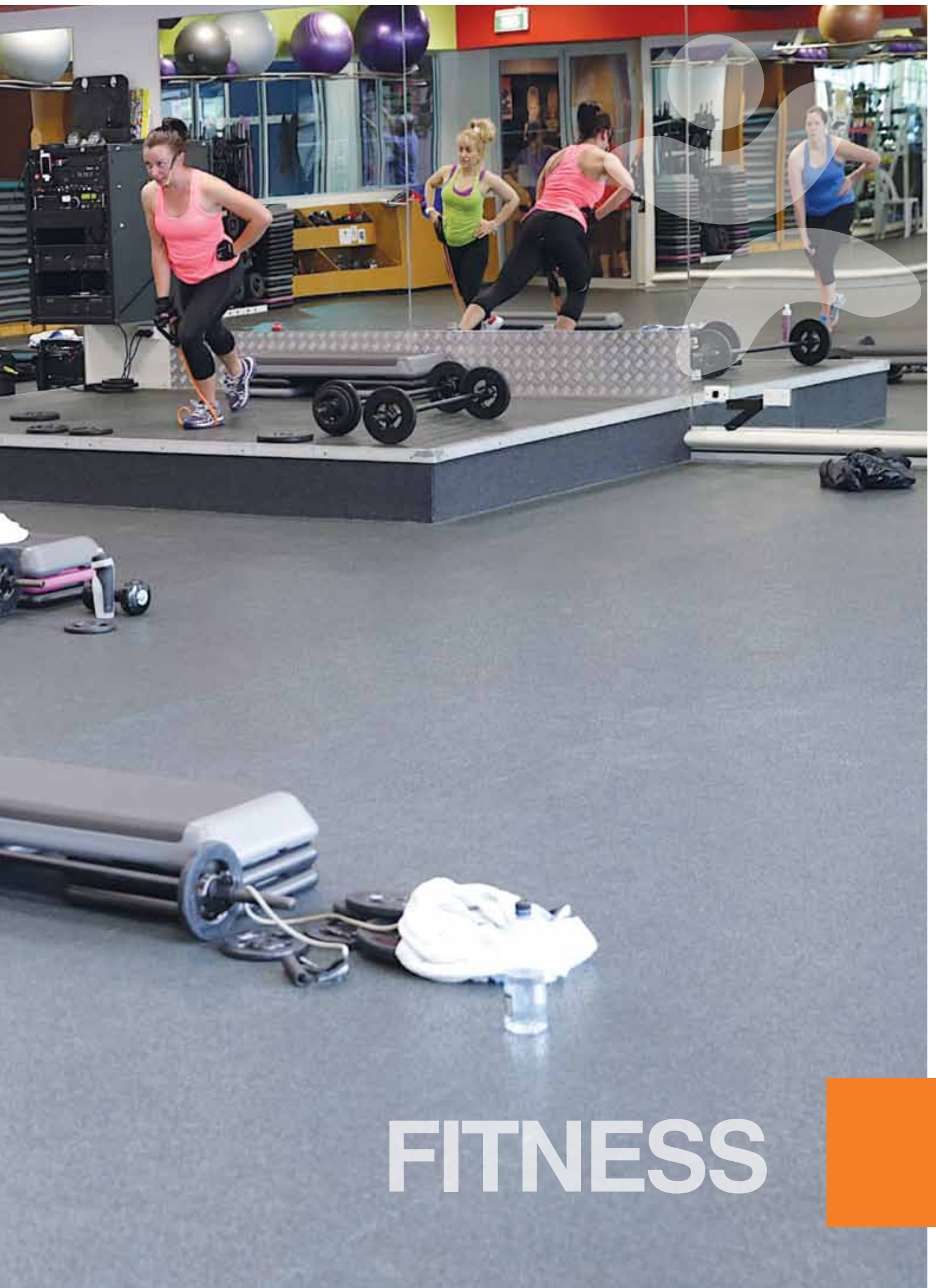
The reliance of the sport, fitness and recreation industry on outdoor spaces make environment and sustainability critical issues, especially given the global push for responsible use of natural resources. There is also significant competition for natural resources and sometimes escalating costs (e.g. water).

Access to these resources is likely to be limited in the future and the industry needs to be able to adapt.

More collaboration and movement

The sectors within sport, fitness and recreation need to work together more, including exploring the potential to offer career pathways between sectors, which would reduce some of the transience in the workforce.





FITNESS

Summary

- The fitness sector is responding to demands for flexible, personalised service.
- Fitness training is increasingly an outdoor activity, requiring new skills and collaboration between sectors.
- Technology is becoming a more important part of a fitness professional's arsenal, with some even providing personal training sessions via the web.
- Fitness professionals are working with more older and younger clients than before, which requires new skills.
- There is demand and opportunity for personal trainers to work collaboratively with medical and allied health professionals.



Latest intelligence

Visible response to changing consumer demands

The fitness sector is answering changes in consumer expectations. Already 11 per cent of gym members belong to a gym that's open 24 hours a day. These gyms are opening faster than their traditional competition.¹¹ Also, the global trend towards personalised service is reflected in the booming market for group personal training. Small groups allow trainers to provide a somewhat tailored service at a lower price than an individual training session.

A training method that promises great fitness and health results in as little as seven minutes spent exercising a few times a week is also expected to become popular in Australia given the need to fit more into busy lives. High Intensity Interval Training (HIIT) was top of the American College of Sport Medicine survey of Fitness Trends for 2014. It involves short bursts of intense training, followed by a short, less-intense period. While it meets the needs of busy people on the face of it, the industry does have concerns because it can lead to injury if done incorrectly.

New models need new skills

The increasingly popular group sessions are usually run outdoors, which has prompted Fitness Australia and Parks and Leisure Australia to formalise their relationship with a memorandum of understanding that will outline a joint position on the proper use of public spaces by fitness professionals.

Because there are more risks in working outside, personal trainers need new skills to:

- assess and mitigate risk
- limit the group's impact on the environment
- understand the legal and policy requirements for using uncontrolled public spaces
- work with authorities to use parks and public spaces properly.

Understanding technology is essential to business

Many fitness professionals, particularly personal trainers, are employed by gyms as contractors or they operate as small businesses. As a result they need to manage their own client base and marketing. Technology provides extremely cost effective ways of marketing and keeping clients engaged, but that means fitness professionals need the ability to stay on top of new technologies.



Technology can lead to new products trainers can offer. It's been reported, for instance, that a small number of fitness professionals have made successful businesses providing fitness classes online using web meeting software. Participants log in at an appointed time to participate in a live class or get the recording if they miss the time.

Changing client profile

Older clients

Between 1973 and 2013, the number of people aged 65 and over in Australia tripled from 1.1 million to 3.3 million.¹² As such, fitness professionals increasingly need to be able to work with medical and allied health professionals to offer fitness programs suitable for older adults.

Younger clients

Australia's *Report Card on Physical Activity for Children and Young People* gave Australian children under the age of 17 years a D minus for overall activity levels.¹³ Fitness professionals have an important part to play in improving that score but they need the skills to work with children and young adolescents. Some businesses within the fitness industry are embracing the opportunity. Fitness First, for instance, has introduced Fitness First Kids and Fitness First for Teens in school holidays.

Clients with medical conditions

The industry believes that there is an increased demand for fitness professionals to collaborate with medical and allied health professionals to deliver evidence based exercise programs for people with chronic conditions.. Examples of these programs are Diabetes Australia's *BEAT IT* program and the *Lift for Life* program developed by Baker IDI Institute and facilitated by Fitness Australia. To conduct either of the above mentioned programs, fitness professionals have to complete specific education courses.

Nutrition and fitness

Including nutrition content in fitness qualifications is a contentious issue for the industry. It is accepted that fitness professionals do need a basic knowledge of nutrition to do their jobs ('scope of practice') but that they should be referring clients to allied health professionals for in-depth advice about diet.



Workforce development needs

Skills opportunities and concerns

Across all industries it is mainly 'soft' skills that are in short supply. In fitness the most important of these are:

- relationship management
- client retention
- the ability to collaborate with medical and allied health professionals.

The only particular labour shortage in the fitness industry is for aqua trainers. The job is seen as unglamorous and it is hard to interest entrants to the industry to go into aqua training.

There are emerging opportunities in the industry for:

- Personal trainers with advanced skills in working with clients with chronic conditions and for trainers who have the fullest knowledge of nutrition appropriate to a personal trainer.
- Fitness services coordinators who can manage fitness services and coordinate between fitness professionals and professionals in allied health services.
- Personal training managers and fitness professionals with the management skills to lead a team of personal trainers.

Current impact of training packages

Fitness qualification commencements and completions

There has been a drop in commencements for Certificate III and Certificate IV from 2012 and 2013. Anecdotally, it is believed there has been an oversupply of graduates to the industry, so it could be argued that the numbers have reverted to appropriate levels.

Diploma levels have remained even but it is expected the number of commencements will increase as VET FEE-HELP has been implemented for Diploma level and above and students opt to take higher qualifications so they can defer payments until they find employment.

Completions continue to rise as the large number of students that commenced in 2011 and 2012 complete their courses.

Table 1: Fitness qualification commencements, 2009–2013ⁱ

	2009	2010	2011	2012	2013
CERTIFICATE III IN FITNESS	5,980	7,414	9,303	10,222	8,350
CERTIFICATE IV IN FITNESS	2,434	3,568	5,612	6,220	3,640
DIPLOMA OF FITNESS	763	910	957	790	559

Table 2: Fitness qualification completions, 2008–2012

	2008	2009	2010	2011	2012
CERTIFICATE III IN FITNESS	2,294	2,742	3,139	4,706	6,450
CERTIFICATE IV IN FITNESS	1,252	1,312	2,189	3,481	4,677
DIPLOMA OF FITNESS	186	208	242	384	612

(i) Source: NCVER VOCSTATS (ncver.edu.au/resources/vocstats/intro.html), extracted on 5/08/2014
 NCVER's VET provider collection provides information on publicly funded training in public providers; publicly funded training in private providers; and fee for service training in public providers. It does not include data for fee-for-service VET by private providers or VET in Schools, where the delivery has been undertaken by schools.
 Prior environmental scans have reported enrolments rather than commencements, and therefore cannot be compared

Future directions for endorsed components of training packages

Workplace competence

Service Skills Australia is consulting with the industry about introducing mandatory workplace assessment in the core units of the suite of fitness qualifications to prove workplace competence. The exercise will include drawing up an outline of best practice workplace assessment for registered training organisations.

Changing population

To recognise the importance of being able to work with different groups, a unit will be included in the Certificate III in Fitness qualification to give graduates an introductory grounding in specific populations, for example children and older adults. The Certificate III will also include referral processes to medical and allied health professionals.

Also the unit on instructing exercise to older clients will be moved to the core of the Certificate III and include more on flexibility, strength, endurance, falls prevention, balance and the benefits of exercise while ageing.

The content of the Certificate III - Aqua Instructor specialisation doesn't properly prepare trainers for the likely demographic of their clientele and how the service is delivered in practice. The current review will ensure graduates are given enough skills to provide safe training. Particular attention will be given to the screening, referral and collaborative management protocols for people with stabilised and managed health conditions.

To equip personal trainers to work with all types of clientele, *SISFFIT013 Instruct exercise to children and adolescents* will be moved to the Certificate IV core units.

Additional risk assessment and management units have been included in the core skills of the training package.

Changes to the diploma

An additional elective grouping, Fitness Services Coordinator, will be included in the diploma to cover the knowledge and skills needed to coordinate evidence-based programs for clients with managed conditions. It will include knowledge of local and national health networks; the skills to build and maintain healthy stakeholder relationships; and the ability to coordinate collaborative programs across various health and wellness sectors.

The diploma will include some content on working with clients with managed chronic conditions, but will ensure fitness professionals always remain within the professional scope of practice and not contradict the expert professional standards authorities in allied health.

There will be a management specialisation in the Diploma which will include the skills required for a personal training manager: a focus on marketing and sales, business analysis, time and money management, recruiting and retaining trainers, mentoring on business skills and proficiency of technical skills.

SERVICE SKILLS AUSTRALIA IS CONSULTING WITH THE INDUSTRY ABOUT INTRODUCING MANDATORY WORKPLACE ASSESSMENT IN THE CORE UNITS

Table 3: Fitness Occupations in Demand

ANZSCO Code	Occupation	Training Package Qualification	Justification/Evidence
4521	Personal Trainer Group Exercise Leader Aqua Instructor/Trainer	<i>Certificate III in Fitness</i> <i>Certificate IV in Fitness</i> <i>Diploma of Fitness</i>	Industry reports ongoing demand for qualified fitness professionals and in particular reports recruitment difficulties for aqua instructor/trainers and group exercise leaders.





COMMUNITY RECREATION



Summary

- **Community recreation and aquatic centres are crucial to the physical and mental health of Australia, especially the growing number of older Australians and particularly in rural communities.**
- **The centres are playing an increasing role in engaging marginalised and culturally diverse groups.**
- **Water safety programs are saving lives, especially in Aboriginal and culturally diverse communities.**
- **Pressure for centres to be financially viable, combined with rising costs, demand innovative solutions and more use of technology, which means workers need new skills.**
- **It is believed that the sector will see an increase in the number of multipurpose recreation facilities.**

Latest intelligence

Community recreation promotes community health

Community recreation centres and aquatic facilities are key to maintaining the physical health of Australians because they provide fitness options to people who might not be physically able to go to a gym or to afford a personal trainer. Centres also offer solutions for older Australians who need suitable options for exercise like aqua aerobics, which offers non-rebounding, low-impact workouts, sensitive to those with joint or rehabilitation concerns. One low impact program is the YMCA's Pryme Movers for older adults, which includes aquatic exercise, yoga and strength training.

The mental health benefits that recreation centres can provide is also a crucial consideration as physical activity and social inclusion can reduce anxiety and stress, particularly for older adults, people living with a disability, and other marginalised groups.

As with the fitness sector, there is a need for the workforce to be able to work with medical and allied health professionals to administer programs for different communities and to work effectively and safely with various groups.



Bringing communities together and saving lives

Local governments in many remote and regional areas have agreed that leisure facilities such as aquatic facilities are part of establishing healthy rural communities. And wherever they might be, community fitness centres and aquatic facilities are increasingly seen as places to engage marginalised groups and culturally and linguistically diverse (CALD) communities. This is particularly important when it comes to water safety because these communities are at greater risk (see Tackling water education).

Programs to encourage social inclusion mirror work being done outside Australia to use sport and recreation as vehicles for social inclusion. In New Zealand, for example, the *Fusion 2014* pilot program is a school holiday program helping young refugees settle in their new country through sports, personal development exercises and life-skills sessions.¹⁴

The community recreation workforce needs to be able to communicate well with diverse populations. Communication will continue to be an important part of training for all community recreation jobs as Australia moves towards an even more multicultural society.

Tackling water education

In Australia 266 people drowned between 1 July 2013 and 30 June 2014,¹⁵ according to Royal Life Saving Society Australia (RLSSA), which believes it is the right of every child to access quality swimming and water safety education in order to prevent drownings.¹⁶ RLSSA has reported that people from CALD communities are at a higher risk of drowning and aquatic injury, especially those from Africa and Asia. RLSSA and local governments are implementing projects to work with CALD communities that teach water safety and facilitate inclusion. Similar programs are being carried out by Life Saving Victoria and the YMCA.

In addition, drowning is the second most common cause of injury or death among Aboriginal children under 14. They are three times more likely to drown than their peers from other backgrounds,¹⁷ prompting Royal Life Saving WA to roll out water safety programs for Aboriginal communities.

Mandatory swimming lessons have just been introduced as part of the national curriculum in the UK.¹⁸ The industry is of the opinion that swimming and water safety should also be part of the Australian national school curriculum because it should be a key focus for the government to help reduce drownings. Making swimming lessons mandatory for all children would increase the need for swimming teachers nationally.



**COMMUNITY
RECREATION AND
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AUSTRALIA**



Cost pressures driving new practices

There is an industry-wide push towards more financially, socially and environmentally sustainable practices. Traditional methods of running recreation centres are extremely inefficient in terms of energy and water use, which is an even greater problem as costs for these resources continue to rise. Facility managers are looking at energy and water efficiency in particular to make centres cheaper to run. For instance, pools all over Australia are looking at solar power, heat pumps, cogeneration and trigeneration to reduce their consumption.ⁱⁱ

The cost of water is also expected to continue to rise as its availability diminishes. Centres may need to consider implementing measures to reduce water use like metering, charging for showers, using water saving devices in showers and toilets, better backwash and pool cleaning protocols and recycling rainwater.

Many advocates of the social benefits of the industry believe the community benefits outweigh the need for centres to be financially viable (as with libraries).

However, the financial strain on local governments is putting facilities under pressure to find savings by using sustainable management processes. As these processes become more common, workers will need the skills to use them correctly and safely.

Technology reducing risk and costs

The use of technology is also expected to grow as a way to reduce risk and costs.

Swimming facilities across the US and Europe are using monitoring systems to help lifeguards spot drowning dangers faster using underwater cameras and sensors. These systems are not seen widely in Australia yet but their use is expected to grow.

The use of automation for pool plant operation is also likely to become more common as the industry looks at ways for pool water health to become safer and more sustainable.

Service Skills Australia will continue to consult closely with the industry to identify the skills needed by the workforce to make the most of these new technologies.

(ii) Cogeneration makes use of the heat produced when generating power. Trigeneration takes this a step further by producing cooling as part of the process.

Multi-purpose recreation facilities

It is widely believed that integrated sport and recreation facilities are the future of the sector as councils—particularly in urban areas—look to minimise land use and running costs. As well as open green spaces, they will offer a variety of services to entice greater community participation - shopping, health and beauty services (massage, spa treatments), cafes and so on.

It is expected this will create a need for recreation planners who can maximise the value to the community and for recreation facility managers who can manage large scale multi-use entertainment venues.

These multi-purpose recreation facilities could create appealing career pathways in the community recreation sector because bigger centres mean more roles and opportunities.

Workforce development needs

Multi-skilled workforce

The industry needs its workforce to be multi-skilled so staff can work across job functions, allowing facilities to provide staff with more hours and more transferable skills. If more investment was made in multi-skilling, it would be easier for staff to see their jobs as careers not just short-term employment.

The industry also reported that facilities will need to offer more to clients if they are to be financially sustainable. Facilities need to be more focused on health and fitness; and the need to include services like cafes, daycare, physiotherapy, and gym and fitness classes. This variety of services will also increase the need for staff with a diverse set of skills. It has been suggested there is a need for consistency of job descriptions across the industry to assist in providing clear career pathways.

Skills opportunities and concerns

In terms of skills shortages, the following are in short supply:

- communication
- customer service
- marketing and business management.

Staff in general are in short supply in regional and remote areas. It's difficult to attract people to any community recreation role in rural areas, as wages in the industry are lower than large rural employers (like mining) and other service industries (like tourism). Also, the seasonal nature of some of the work offers no job security or year-round employment.

There are emerging needs for:

- Swimming school coordinators at larger facilities—a need that will grow if swimming becomes part of the national school curriculum.
- Staff with marketing skills to promote facilities to the community to increase participation.
- Staff who can communicate well with different populations.

Case Study: Aquatic Industry Partnership

Royal Life Saving NSW partnered with the Australian Training Company to participate in the 'Strategic Skills' program, funded by the New South Wales Government. The program provided subsidised training in various skill sets to candidates within the aquatic industry in regional and remote New South Wales. Royal Life Saving NSW identified a training need within these communities, as many aquatic employees have limited formal qualifications and many have not completed further education.

Royal Life Saving provided training for candidates across three skill sets – Aquatic Technical Operator, Customer Service and Swimming and Water Safety Teacher. Training commenced in late June 2014, with 141 candidates taking part in the skill set of their choice.

Royal Life Saving NSW identified a need to provide these skills sets to regional and remote candidates to allow students to build on their current training to become multi-skilled. This supports the industry, creating a more professional and skilled aquatic workforce, whilst supporting employment opportunities for jobseekers and improving the skills of existing workers. Successful completions of the skills sets allows candidates to work across job roles within aquatic centres, and provides candidates with an opportunity to increase their chances of developing sustainable careers within the industry.



Current impact of training packages

Community recreation commencements and completions

There has been a sharp decline in the number of commencements of the Certificate II in Community Recreation; the qualification has been deleted and it is now coming to the end of its teach out period. The Certificate II was mainly delivered as part of VET in Schools (VETiS).

The commencements for Certificate II in Community Activities has not been as high as it is believed that schools have substituted this qualification with the Certificate II in Sport and Recreation as it sounds more appealing to students than community activities.

There has been a noticeable increase in the number of commencements for the Certificate III in Aquatics from 2012 and 2013; it is thought this is due to skill set commencements which are included in these figures. Skill sets have been identified as an entry point for industry.

Table 4: Community Recreation qualification commencements, 2009–2013

	2009	2010	2011	2012	2013
CERTIFICATE I IN COMMUNITY RECREATION*	80	205	194	0	0
CERTIFICATE II IN COMMUNITY ACTIVITIES	0	0	0	395	490
CERTIFICATE II IN COMMUNITY RECREATION*	3,270	3,167	3,053	1,350	6
CERTIFICATE III IN AQUATICS	0	0	0	113	500
CERTIFICATE III IN COMMUNITY ACTIVITY PROGRAMS	521	612	712	482	892
CERTIFICATE IV IN COMMUNITY RECREATION	78	62	69	43	183
DIPLOMA OF COMMUNITY RECREATION*	13	0	0	0	0
DIPLOMA OF FACILITY MANAGEMENT*	0	0	1	17	32

*This qualification has been deleted.

Table 5: Community Recreation qualification completions, 2008–2012

	2008	2009	2010	2011	2012
CERTIFICATE I IN COMMUNITY RECREATION*	46	98	114	242	4
CERTIFICATE II IN COMMUNITY ACTIVITIES	0	0	0	12	39
CERTIFICATE II IN COMMUNITY RECREATION*	627	697	790	621	787
CERTIFICATE III IN AQUATICS	0	0	0	0	32
CERTIFICATE III IN COMMUNITY ACTIVITY PROGRAMS	85	87	163	168	240
CERTIFICATE IV IN COMMUNITY RECREATION	32	50	26	32	20
DIPLOMA OF COMMUNITY RECREATION*	0	0	0	0	0
DIPLOMA OF FACILITY MANAGEMENT*	0	0	0	0	3

*This qualification has been deleted.

Future directions for endorsed components of training packages

The Certificate II in Community Activities will be merged with the Certificate II in Sport and Recreation. Much of the content is similar and it is believed that merging the qualifications will give graduates a better range of skills, which will allow them to work across industries.

The Certificate III in Aquatics and the Certificate III in Community Activity Programs will also be merged to become Certificate III in Aquatics and Community

Recreation. This—along with the introduction of more flexible packaging rules in the qualification—will allow graduates to be multi-skilled.

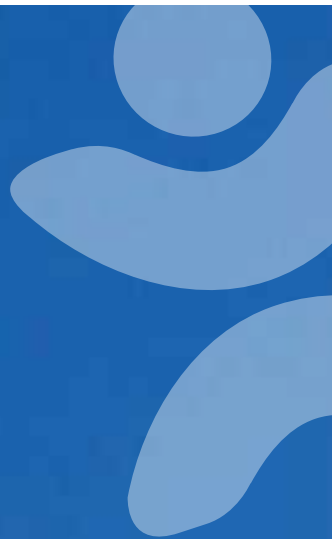
A greater focus on customer service and communication skills will be included in the units to equip graduates with the skills to be able to communicate with various population groups.

As with the Certificate II, the Certificate IV in Community Recreation will be merged with the Certificate IV in Sport and Recreation because much of the content of the qualifications is similar. Merging the qualifications will remove duplication and provide graduates with more career development opportunities across industry.

Table 6: Community Recreation occupations in demand

ANZSCO Code	Occupation	Training Package Qualification	Justification/Evidence
452315	Swimming Instructor	<i>Certificate III in Aquatics</i>	The Australian Water Safety Strategy developed by the Australian Water Safety Council (AWSC) aims to reduce the number of drowning deaths in Australia by 50 per cent by 2020. Education and training have been identified as a key driver in the reduction of drowning. Swimming Instructors are expected to continue to be in demand to administer learn to swim programs for children and adults to assist the industry in meeting this goal.





OUTDOOR RECREATION

Summary

- **Outdoor recreation has been found to be a significant direct and indirect contributor to the economies of other countries but no study has been done at the national level in Australia.**
- **Schools outsourcing outdoor education is expected to continue to bring substantial growth to the sector.**
- **Outdoor recreation workers need more skills to give them the best chance of full time employment in the sector.**
- **Volunteers are an important part of the sector but their numbers are falling.**
- **Training needs to be flexible and reasonably priced to support workers already in the sector and volunteers.**
- **The inconsistent application of activity standards makes things hard for organisations working across states.**
- **Qualifications might need to be moved to higher Australian Qualification Framework levels because of the level of risk in the activities involved.**

Latest intelligence

Outdoor education in schools is driving growth

Schools are responsible for approximately 20 per cent of annual growth in the sector, according to industry feedback, and the trend is expected to continue. Schools are choosing to outsource outdoor education programs to specialists because of the high risk and high cost of running the programs themselves.

Industry sources say there is a skills shortage in this area and training is needed in:

- providing the educational aspect of outdoor recreation that schools need
- working with young people, particularly those who are marginalised or vulnerable.

There is debate as to whether the VET system is the best way to deliver this type of training or whether, for instance, workers need to be trained teachers or healthcare workers. It has been suggested that the solution might be to have VET-trained staff working in conjunction with the teaching or healthcare professionals who would usually accompany a school group on outdoor programs.



Meeting very different training needs

Training needs to be flexible if it is to meet the needs of all three of the groups comprising the sector:

- Not-for-profit organisations like Scouts or Girl Guides Australia, which are made up of mainly volunteers
- Outdoor education providers, which work mainly with school groups
- Outdoor adventure providers, which are mostly in the tourism industry.

Volunteers are a significant part of the outdoor recreation workforce, but it has been noted anecdotally that their numbers are decreasing. It's been suggested this might be because people have less free time and because of the time and expense needed to meet the legislative requirements for being a volunteer.

Professional development for volunteers can be an incentive for participation, but a difficult balance has to be struck. The training needs to be rigorous enough to qualify someone to manage the high level of risk involved in outdoor pursuits, but it needs to be accessible so that it is not an additional burden for volunteers.¹⁹

Standardising

Adventure Activity Standards (AAS) have been in operation in many states since 2003, but they're applied differently across jurisdictions. This causes problems for organisations that work across states and there is a suggestion in the sector that they be standardised at a federal level.

A project called *Understanding and Preventing Led Outdoor Accidents Data System* (UPLOADS) has been undertaken by the University of the Sunshine Coast, Monash University and Federation University Australia, and Australian outdoor education and recreation associations, providers and government departments. The aim of the project is 'to develop a standardised approach to incident reporting for the outdoor education and recreation sector in Australia, and a corresponding national incident dataset.'²⁰

The database will include the number and types of incidents and near misses for the organisations involved and the findings will be made public every six months. Most importantly, organisations will be able to ask for reports from the national database to help them put together risk management strategies for specific issues. This will make an important contribution to ensuring the sector is safer.²¹

Skills Active, the body responsible for vocational education and training in New Zealand, is undertaking a review of their qualifications for outdoor recreation. The review has found some level 3 activities under the New Zealand Qualifications Framework (NZQF) would more appropriately sit at an NZQF level 4 or above, because of their inherent risk.

Service Skills Australia is about to undertake a similar review of the Australian outdoor recreation qualifications and will take this into consideration when deciding if the qualification is being provided at the suitable Australian Qualification Framework (AQF) level.



An untold economic contribution

International studies have measured the contribution of outdoor activities to the economy. They have concentrated on the longer term economic and social benefits of health and wellbeing.²² A New Zealand study, for instance, found sport and recreation contributes about as much to their economy—\$5.2 billion—as the dairy industry; plus an additional \$7 billion of indirect economic benefits from improved health, productivity and wellbeing.

No national study has been carried out in Australia, but there have been state-based studies. For instance, a Queensland Outdoor Recreation Federation and Synergies study found:

- outdoor recreation's estimated annual contribution to gross state product to be at least \$2 billion
- outdoor recreation is already potentially playing a significant role in reducing health costs and could become increasingly important in light of expected strong growth in health expenditure
- a large and increasing body of international qualitative research attributes a wide range of benefits to outdoor recreation in the areas of individual and community health, the environment and education.

In Victoria, The Future Economy Group ran a modelling project to 'provide an indicative examination of the relationship between Victoria's economy and natural capital.' The report suggests a significant link between the health of 'natural capital' and the economic prosperity of the state, and outdoor recreation is part of this equation.²³

A national study would give government a better picture of the contribution being made to the economy by outdoor recreation.

Workforce development needs

Multi-skilled workforce

The 2013 National Outdoor Sector Survey found the workforce needs to be multi-skilled. The industry suggests outdoor leaders need experience or qualifications in an average of five areas to gain full time employment.²⁴

This has been attributed to two factors:

- Participants in outdoor recreation increasingly looking for an 'experience' and expect this to involve more than one activity.
- Employment in the sector generally being casual and seasonal. To get year-round employment, workers need skills suited to different seasons (e.g. ski instructing for winter and leading bushwalks for summer).

To help graduates find full time employment their training needs to recognise this need for multiple skills. It also needs to be available in ways that make it easy for those already in the sector to top up their skills.

Skills opportunities and concerns

There are concerns that changes in funding for outdoor recreation, in Victoria and South Australia particularly, will reduce the number of outdoor recreation graduates, despite the skills and labour shortages in the sector.

- There are opportunities in the sector for workers with skills in:
 - + facilitation
 - + communication
 - + relationship management
 - + business management.
- There is a shortage of outdoor leaders, which has led to some organisations linking with training organisations overseas to find graduates and increase their pool of candidates.
- It is expected that outdoor education leaders with the skills to assist with the educational needs of school groups will find themselves in demand.

Current impact of training packages

Outdoor recreation commencements and completions

There was a large rise in students enrolling in the Certificate II in Outdoor Recreation from 2012 to 2013, which is concerning for industry as this qualification only gives graduates the skills and knowledge to participate in outdoor activities, not to work independently in the industry. This qualification is mainly delivered by secondary schools as part of their outdoor education curriculum.

At the same time, enrolments in the Certificate III qualification, which is seen as an entry level qualification, have dropped off. Certificate IV completions have decreased by more than 50 per cent, with these graduates expected to fill the role of Outdoor Leader, which are currently in short supply.

**OUTDOOR LEADERS
NEED EXPERIENCE
OR QUALIFICATIONS
IN AN AVERAGE
OF FIVE AREAS TO
GAIN FULL TIME
EMPLOYMENT**

Table 7: Outdoor Recreation qualification commencements, 2009–2013

	2009	2010	2011	2012	2013
CERTIFICATE II IN OUTDOOR RECREATION	1,177	1,197	1,432	1,863	4,487
CERTIFICATE II IN OUTDOOR RECREATION (MULTIPLE ACTIVITIES)*	180	333	249	37	0
CERTIFICATE III IN OUTDOOR RECREATION	774	1,518	1,476	1,597	1,277
CERTIFICATE III IN OUTDOOR RECREATION (MULTIPLE ACTIVITIES)*	108	114	212	37	0
CERTIFICATE IV IN OUTDOOR RECREATION	362	752	2,564	2,268	2,856
DIPLOMA OF OUTDOOR RECREATION	130	218	164	162	112

*This qualification has been deleted.

Table 8: Outdoor Recreation qualification completions, 2008–2012

	2008	2009	2010	2011	2012
CERTIFICATE II IN OUTDOOR RECREATION	270	136	163	142	383
CERTIFICATE II IN OUTDOOR RECREATION (MULTIPLE ACTIVITIES)*	18	15	36	3	38
CERTIFICATE III IN OUTDOOR RECREATION	114	107	116	156	161
CERTIFICATE III IN OUTDOOR RECREATION (MULTIPLE ACTIVITIES)*	46	21	24	72	54
CERTIFICATE IV IN OUTDOOR RECREATION	119	128	122	391	186
DIPLOMA OF OUTDOOR RECREATION	42	43	75	94	82

*This qualification has been deleted.



Future directions for endorsed components of training packages

In response to the evolving needs of the sector, qualifications will be made more flexible to make sure students are skilled in enough activity areas to give them the best possible chance of full time employment. At the same time, skill sets will be streamlined so workers in the sector can top up or broaden their skills as easily and cost effectively as possible.

To meet the needs of the growing number of schools outsourcing their outdoor education, additional communication and facilitation units will be included in all qualifications.

All qualifications will be reviewed in conjunction with the Adventure Activity Standards to ensure that activities sit at the appropriate skill level in the Australian Qualification Framework.

In addition, mandatory workplace assessment hours may be introduced into units to address concerns about work readiness. The appropriate numbers of hours of work placement will be determined by industry consultation.

IN RESPONSE TO THE EVOLVING NEEDS OF THE SECTOR, QUALIFICATIONS WILL BE MADE MORE FLEXIBLE

Table 9: Outdoor Recreation occupations in demand

ANZSCO Code	Occupation	Training Package Qualification	Justification/Evidence
4522	Outdoor Leaders (Outdoor Adventure Guide)	<i>Leaders under supervision: Certificate III in Outdoor Recreation</i> <i>Independent leaders: Certificate IV in Outdoor Recreation</i>	The sector reports difficulty recruiting qualified outdoor adventure leaders, particularly following a continuing reduction in the provision of these courses nationally.



SPORT





Summary

- Declining participation is forcing organisations to rethink how and to whom they promote sport, even going so far as to modify sports to appeal to different groups.
- New versions of sports and new types of participants require new skills on the part of coaches and officials.
- Sport is recognised globally as important to mental health, physical wellbeing and social cohesion and inclusion, and programs are in place in Australia to make the most of that.
- The sport workforce needs to be able to use technology to meet participants' expectations and to manage organisations and clubs to the increasingly professional level that is needed.
- Pressure on outdoor spaces and the rising cost of natural resources like water is forcing some rethinking.
- Scandals have diminished public confidence in the integrity of sports.
- Sports need to be run more professionally and management needs to be more inclusive, especially of women, which means new and higher level skills will be needed for some of the workforce.

Latest intelligence

New sports to bolster participation

Declining participation in organised sport is well-documented, so the sector is looking for ways to reach people who want to play sport but not in the traditional format. The sector is offering modified versions of sports to adults and children.²⁵ Cardio tennis, for example, is a modified form of tennis designed to improve adult fitness and provide opportunities for social interaction.

It's too soon to say what impact modifying sports will have on participation, but organisations have identified that changes to the way people are participating will determine the types of coaches and officials required.

To determine the types of coaches, officials and other support necessary to reach their participation goals, the Australian Sports Commission (ASC) is working with national sporting organisations that participate in the National Coaching and Officiating Accreditation Schemes.

Health and social inclusion

The United Nations promotes sport as a way to advocate inclusion, saying 'Sport can play an important role in reducing social tensions and conflicts at the community and national level by addressing the sources of this exclusion and providing an alternative entry point into the social and economic life of communities.'²⁶

In Australia the *Supporting healthy communities through sports and recreation* programs report from the Australian Institute of Health and Welfare and the Australian Institute of Family Studies finds a large number of links between participating in sport and improved physical and mental wellbeing, as well as improved social cohesion and inclusion.²⁷

In 2012 there were three million Australians who reported having a mental or behavioural condition.²⁸ Sport has embraced the part it can play in mental health awareness and management. Sporting groups have partnered with mental health groups to deliver programs that promote the capabilities of clubs to provide support for people experiencing mental health issues.

For instance, the *Good Sports Mental Health* program run with Beyond Blue and the Australian Drug Foundation, aims to raise mental health awareness and the capability of communities in regional and rural areas (where awareness of these issues is particularly low) by working directly with community sports clubs.²⁹ Individual codes have also developed programs to promote awareness of mental health issues and to reduce the stigma around them, for example the AFL's *Sons of the West* men's mental health program.

As with community recreation, organised sport is also being used in Australia as a vehicle for social inclusion. It has been established that people from lower socio-economic backgrounds are less likely to join a sporting organisation. This has been taken on board by some state governments, with voucher systems introduced to allow all children to access organised sports. Another example is VicHealth's Everyone Wins program, which aims to increase participation in sport by priority population groups, including people with a disability, Indigenous Australians, people from culturally and linguistically diverse communities, and women and girls.

Technology

Like the fitness sector, the sport sector has embraced technology as a way to engage with its participants.

Clubs and sporting organisations need to use social media to provide real-time updates to members, who expect a website or Facebook page as a matter of course. Organisations need to have the skills and ability to develop digital content and keep it up to date, which is a challenge as much of the workforce is voluntary, especially at the grassroots level.

Wearable technology has taken off in the sporting world with recreational participants, elite sports people and clubs embracing the technology. Analysts, Endeavour Partners, found that 10 per cent of American adults with internet access owned an activity tracker. Catapult Sport, which was born out of the Australian Institute of Sport, is the leader in this technology for elite sports teams.³⁰

There is also a growth in the use of online management solutions to streamline administration. Cricket Australia, for example, uses a customer relationship management system to attract new participants and to support its players and staff. It's used from the grassroots to the elite level to manage participation.

Environment

As with other industry sectors, sport is directly affected by what is happening in the natural environment because of its reliance on outdoor spaces.

Maintaining sports grounds is costly and labour intensive for clubs. They require lots of water, a resource with a rising cost, so clubs are looking at smarter ways to manage their outdoor spaces—like using more synthetic surfaces, which are easier to maintain and save on water use. Through programs like the *Community Sporting and Recreation Facilities Fund (CSRFFF)* in Western Australia, state governments have given funding for clubs—particularly in drought-prone areas—to replace grass with synthetic surfaces.

As previously outlined, it's believed that multi-use sporting precincts are the future of outdoor sport. For instance, Tennis Australia and Parks and Leisure Australia are working together to lobby for community infrastructure funds to create multi-purpose facilities, but it is expected this type of project will require billions of dollars to implement.

Case Study: Tennis Australia Coaching Pathway

Tennis Australia is responsible for not only promoting tennis and participation, but also facilitating player and coach development, staging local and international events and investing in tennis facilities around Australia.

Tennis Australia has developed a comprehensive education pathway for current and prospective tennis coaches, which incorporates nationally recognised Vocational Education and Training (VET) qualifications. The pathway includes a skills set catering for new coaches and volunteers and also provides training for more experienced coaches, assisting them to achieve a nationally recognised qualification in Sport Coaching or Management.

Using this approach Tennis Australia is able to develop a strong coaching workforce through the provision of quality training to coaches who drive participation and performance and promote the sport across the country.

Integrity and professionalism in sport

Integrity issues in sport have been well documented here and internationally. A report from the Danish Institute for Sports Studies found the recent rise in scandals in Denmark had threatened 'the public trust in sport as a lever of positive social and cultural values in democratic societies' because the credibility of sporting organisations had been fundamentally shaken.³¹ In Australia sportspeople from a variety of codes were found guilty of offences in 2014, cases that attracted considerable media attention.

As a result the ASC is emphasising to national sports organisations the need to professionalise their governance structures by implementing their Mandatory Sports Governance Principles. As sport becomes more professional there is a need for the workforce to have human resources management and general business skills so that organisations and clubs that have previously been run by volunteers will be able to promote their sport as ethical and inclusive of all segments of the population.

Government has called for more female representation on the boards of sporting organisations and for sports clubs to be more inclusive of women. 'Women now account for 28 per cent of directors on sport boards in Australia, up from 22 per cent in 2009, but the percentage of women holding the chair has nearly halved to just 12 per cent and the number of women CEOs has dropped to 18 per cent from 21 per cent.'³²

Workforce development needs

Skills opportunities and concerns

There are skills shortages in the following:

- business and governance skills (particularly at the grassroots level)
- communication skills
- skills in developing new products
- coaching.

Volunteers are needed in all areas of sport, but particularly in governance roles at the grassroots level. These roles have traditionally been filled by parents of participants but they now need the experience in governance necessary to support the move towards greater professionalism.

There is an emerging need for:

- Inclusion officers: to help sporting groups engage with all segments of the population and to promote inclusive environments.
- Community development officers: to help clubs engage with communities, particularly those that are multicultural, rural or remote.
- Integrity officers: to help sporting organisations with policy development and implementation for issues including member welfare, gambling, match fixing and anti-doping, as well as other issues of integrity.

**SCANDALS HAVE
DIMINISHED PUBLIC
CONFIDENCE IN
THE INTEGRITY OF
SPORTS**

Current impact of training packages

Sport commencements and completions

There was a drop in commencements for all sport qualifications except for Certificate III in Sports Trainer, Diploma of Sports Coaching and Diploma of Sport Development from 2012 to 2013

As outlined previously, it is believed that the large increase in enrolments in 2012 and 2013 for the Certificate II in Sport and Recreation is a result of schools offering this qualification rather than the Certificate II in Community Activities, which is not as appealing to students.

The Certificate III, IV and Diploma of Sport (Athlete Support Services) were deleted in 2010 and students undertaking and completing these qualifications have been decreasing as it comes to the end of the teach-out period.

As reported in the Service Skills Australia 2014 Environmental Scan the spike in Certificate II in Career Orientated Participation in 2011 was mainly due to enrolments in Victoria and they have since fallen considerably.³³

There has been a marked drop in commencements for Certificate IV in Sports Development, but a significant increase in students undertaking Diplomas. It is possible that this may indicate a desire for more highly qualified staff within industry.

Table 10: Sport qualification commencements, 2009–2013

	2009	2010	2011	2012	2013
CERTIFICATE I IN SPORT AND RECREATION	412	192	208	1,246	250
CERTIFICATE II IN SPORT AND RECREATION	579	433	543	2,027	1,637
CERTIFICATE III IN SPORT AND RECREATION	842	810	1,588	2,638	2,086
CERTIFICATE IV IN SPORT AND RECREATION	432	548	687	712	92
DIPLOMA OF SPORT AND RECREATION MANAGEMENT	485	347	473	371	279
CERTIFICATE II IN SPORT (CAREER ORIENTED PARTICIPATION)	109	97	1,797	167	22
CERTIFICATE III IN SPORT (CAREER ORIENTED PARTICIPATION)	254	270	272	133	72
CERTIFICATE III IN SPORT (ATHLETE SUPPORT SERVICES)*	79	109	115	28	0
CERTIFICATE IV IN SPORT (ATHLETE SUPPORT SERVICES)*	44	62	32	8	0
DIPLOMA OF SPORT (ATHLETE SUPPORT SERVICES)*	129	107	83	32	0
CERTIFICATE II IN SPORT COACHING	1,666	1,992	1,916	2,432	1,984
CERTIFICATE II IN SPORT (OFFICIATING)*	155	137	71	0	0
CERTIFICATE III IN SPORTS TRAINER	0	0	29	94	133
CERTIFICATE III IN SPORT COACHING	75	127	437	302	198
CERTIFICATE III IN SPORT OFFICIATING	18	50	66	51	0
CERTIFICATE IV IN SPORT COACHING	140	101	158	360	48
CERTIFICATE IV IN SPORT (OFFICIATING)*	0	0	5	0	0
DIPLOMA OF SPORT COACHING	4	4	24	77	77
CERTIFICATE IV IN SPORT DEVELOPMENT	462	446	539	483	203
DIPLOMA OF SPORT DEVELOPMENT	550	603	596	720	998

*This qualification has been deleted.

Table 11: Sport qualification completions, 2008–2012

	2008	2009	2010	2011	2012
CERTIFICATE I IN SPORT AND RECREATION	19	74	58	61	589
CERTIFICATE II IN SPORT AND RECREATION	141	155	92	127	1,084
CERTIFICATE III IN SPORT AND RECREATION	172	327	269	877	1,266
CERTIFICATE IV IN SPORT AND RECREATION	54	94	159	454	548
DIPLOMA OF SPORT AND RECREATION MANAGEMENT	125	120	165	205	275
CERTIFICATE II IN SPORT (CAREER ORIENTED PARTICIPATION)	20	24	19	1,388	24
CERTIFICATE III IN SPORT (CAREER ORIENTED PARTICIPATION)	40	66	182	253	76
CERTIFICATE III IN SPORT (ATHLETE SUPPORT SERVICES)*	35	42	63	45	9
CERTIFICATE IV IN SPORT (ATHLETE SUPPORT SERVICES)*	34	43	52	64	18
DIPLOMA OF SPORT (ATHLETE SUPPORT SERVICES)*	41	56	65	53	30
CERTIFICATE II IN SPORT COACHING	67	217	358	290	958
CERTIFICATE II IN SPORT (OFFICIATING)*	14	38	28	63	0
CERTIFICATE III IN SPORTS TRAINER	0	0	0	28	77
CERTIFICATE III IN SPORT COACHING	57	9	51	204	324
CERTIFICATE III IN SPORT OFFICIATING	0	9	17	50	43
CERTIFICATE IV IN SPORT COACHING	40	32	8	41	248
CERTIFICATE IV IN SPORT (OFFICIATING)*	0	0	0	0	0
DIPLOMA OF SPORT COACHING	0	0	1	3	36
CERTIFICATE IV IN SPORT DEVELOPMENT	99	203	172	224	211
DIPLOMA OF SPORT DEVELOPMENT	103	149	217	288	549

*This qualification has been deleted.



Future directions for endorsed components of training packages


As outlined previously, the Certificate II and Certificate IV and Sport and Recreation and Community Recreation will be merged, as much

their content is similar. Merging the qualifications removes duplication and give graduates more career development opportunities across the sport, fitness and recreation industries.

There will also be a greater focus on communication skills in the qualifications to reflect the need for graduates to be able to engage with diverse population groups.

Table 12: Sport occupations in demand

ANZSCO Code	Occupation	Training Package Qualification	Justification/Evidence
4523	Sports Coach or Instructor	<i>Community Coach: Certificate II in Sport Coaching</i> <i>Certificate III in Sport Coaching</i> <i>Sport Coach: Certificate IV in Sport Coaching</i> <i>High Performance Coach: Diploma of Sport Coaching</i>	Increasing the quality and professionalism of community coaches has been raised as a strategy to ensure greater community participation in physical activity. It is reported that many community coaches, predominantly volunteers, lack training. Ongoing demand for these occupations is expected due to churn rate of mainly volunteer roles.
452321	Sports Development Officer	<i>Sports Development Officer: Certificate IV in Sport Development</i> <i>Sport Development Manager: Diploma of Sport Development</i>	Industry reports that sport development occupations continue to be in demand as sporting organisations attempt to boost participation and develop lasting relationships with consumers that engage with the sport. These roles play a key part in implementing and promoting participation strategies.
139915	Sports Administrator (Executive Officer)	<i>Diploma of Sport and Recreation Management</i>	The sport sector is professionalising and commercialising in order to be more sustainable. This is being achieved with a focus on the skills of Executive Officers at the state and national levels in terms of improved management, strategic planning, finance and budgeting, human resources, leadership and governance skills.
N/A	Board and Committee Members	<i>SIS10 skill sets:</i> <i>Organisation Governance – Board</i> <i>Organisation Governance – Committee</i>	The sport and recreation sectors often rely on volunteers as members of their governance structures. There is ongoing feedback from industry that there is a need for governance skills at a board level.



**THERE IS CONCERN
ACROSS THE
INDUSTRY ABOUT
THE EFFECT
FUNDING CUTS
WILL HAVE ON
THE DELIVERY
OF TRAINING**

VET responses

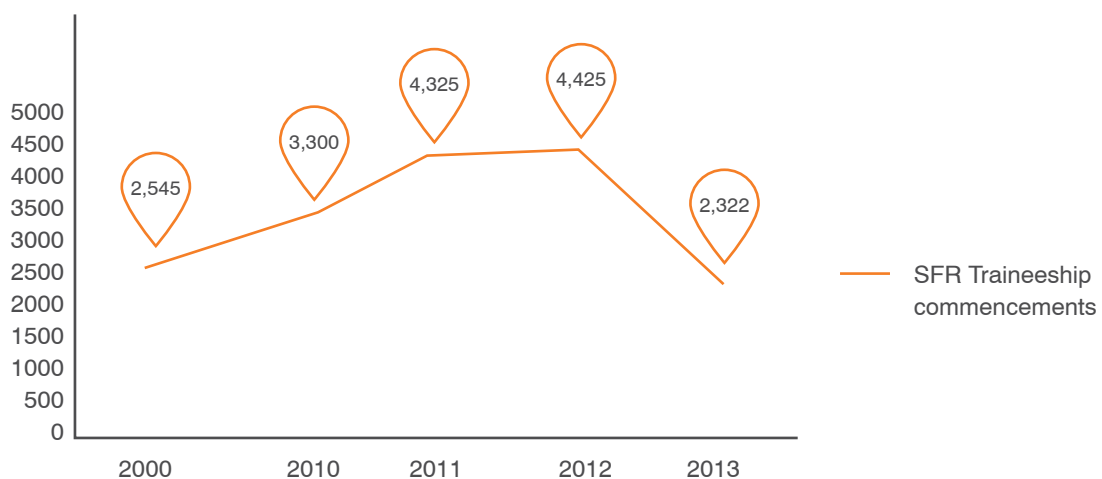
Work-ready graduates

The industry as a whole has concerns about the readiness for work of graduates undertaking sport, fitness and recreation qualifications. There is a call for qualifications to be more rigorous and for training to take the time necessary to produce quality graduates. The fitness industry in particular is concerned by the speed with which graduates were being produced and

has asked for work placement hours to be built into all fitness qualifications.

The outdoor recreation sector has been even more concerned by the inconsistent quality of graduates. Many organisations are bringing training in-house to be sure they get the high quality graduates they need.

Table 13: Sport, Fitness and Recreation Traineeship commencements



Traineeships

It has been suggested traineeships could alleviate some issues with inconsistent delivery of training. Traineeships are not widely used in the sport, fitness and recreation sector—there were only 2,322 in 2013. Industry has suggested this is because of the seasonal and casual nature of the workforce, which doesn't fit with the traineeship model offered by most states. One suggestion from the industry is that organisations partner to provide year-round traineeships. Alternatively, state governments could look at providing a traineeship model for casual employees.

in Victoria and South Australia. It's thought that this would lead to a reduction in the number of registered training organisations offering the qualifications, because the high risk nature of the industry means training is costly to deliver. In Victoria this has led to more dialogue between the outdoor recreation industry and the state government to try to negotiate a positive outcome for all parties.

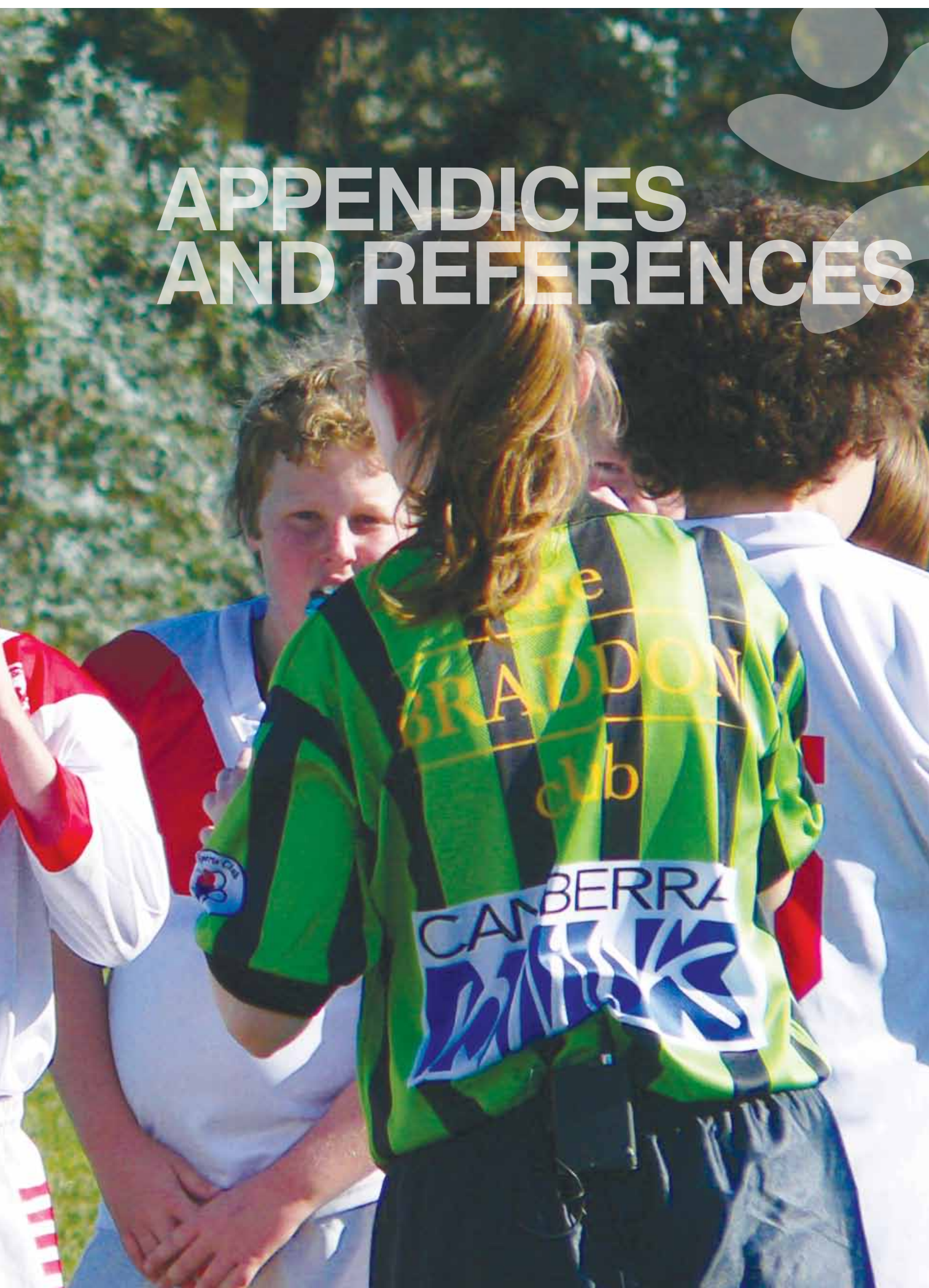
In NSW the Outdoor Recreation Industry Council (ORIC) asked the Independent Pricing and Regulatory Tribunal (IPART) to review the funding the NSW government was offering for the delivery of outdoor recreation qualifications. ORIC's recommendation for additional funding was supported by IPART and the revised funding arrangements are being used by State Training Services (STS) to cost their courses, which will take effect in 2015.³⁴

VET policy hotspots

There is concern across the industry about the effect funding cuts will have on the delivery of training, particularly funding for outdoor recreation qualifications



APPENDICES AND REFERENCES





Appendices

Appendix A – Report on previous continuous improvement activity

No changes to training packages have been submitted by Service Skills Australia since the publication of the 2014 Environmental Scan. However, extensive industry engagement and scoping work has been ongoing and areas for development are outlined in the section of this scan titled Future Directions for Endorsed Components of Training Packages.

Appendix B – Methodology and bibliography

The content examined in this Environmental Scan, and the supplementary sector-specific Environmental Scans, were developed through extensive consultation with key industry stakeholders across Australia. The information was gathered via forums, surveys and targeted interviews and supplemented with a review of related research reports and the media. Additionally, further information was obtained from the past and current work of Service Skills Australia.

Service Skills Australia's Industry Advisory Committees provided feedback and validation for draft versions of the Environmental Scans throughout 2014. The final versions were approved by the committees and Board of Directors in December 2014. Service Skills Australia wishes to thank its board and committee members for their significant contribution throughout the development of these Environmental Scans.

The full bibliography can be seen in the References section of this report.

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