



STAKEHOLDERS



OUTCOMES



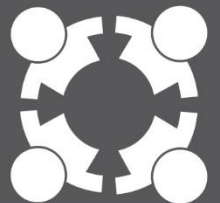
INTEGRITY



BOLDNESS



TEAMWORK



Sport and Recreation

Industry Reference Committee

Draft 2018 Industry Skills Forecast for Public Consultation

Skills Forecast

Name of IRC: Sport and Recreation

Name of SSO: SkillsIQ Limited

About SkillsIQ

SkillsIQ supports 17 Industry Reference Committees representing diverse ‘people-facing’ sectors. These sectors provide services to people in a variety of contexts such as customer, patient or client. The Industry Reference Committees are collectively responsible for overseeing the development and review of training package products, including qualifications, serving the skills needs of industry sectors that comprise almost 50 per cent of the Australian workforce.

Sector Overview

The sport, fitness and recreation sector is complex and encompasses four main industry areas: sport, fitness, aquatic and community recreation, and outdoor recreation.

The complexity of the sport, fitness and recreation sector is partly due to its size, fragmentation and range of subsectors.

While the public profile of the sector can be more greatly affected by sports with a high profile through large fan bases, it is participation in physical activity which provides demand across the industry areas. Each of the industries within the sector also report an overlap with the health and wellbeing industries.

A diverse set of business and organisation types exist across each of the industry areas and include:

- Not-for-profits (inclusive of volunteer organisations)
- Government bodies (Local, State and Federal)
- Commercial enterprises (from large companies to sole traders).

The sport, fitness and recreation sector is extremely popular with Australian consumers, as the variety of sports, fitness and recreation activities caters to a range of demographics and tastes. Each industry in the sector has grown over the past five years, as consumers have increased their expenditure on sport-related, fitness and recreation activities. The sector’s economic contribution is equivalent to 2–3% of GDP, employing more than 220,000 people and attracting 1.8 million volunteers – Australia’s largest volunteer destination¹.

The occupations for this sector that this Industry Reference Committee (IRC) represents include;

- Outdoor activity guides
- Outdoor activity instructors
- Youth workers
- Outdoor recreation manager

¹ Australian Government 2017, *Australian Sports Commission, Intergenerational Review of Australian Sport 2017*

- Camp managers
- Fitness Instructors
 - Group instructors
 - Gym floor instructors
- Personal Trainers
- Life Guard
- Pool Lifeguard
- Gym centre managers
- Sports Coaches and Instructors
- Sports Officials
- Sports trainer and official
- Team manager
- Sports event manager
- Sports development officer and manager

Community recreation job roles include:

- Customer services officer
- Administration officers
- Aquatic technical operators
- Duty Managers
- Aquatic facility managers
- Aquatic Instructor
- Swimming and Water Safety Teachers
- Community recreation activity assistant
- Community activities officer
- Recreation officer and leader
- Facility Manager
- Pool Operators
- Sport and Recreation Event Manager
- Development Officers

Differentiation between the industries in the sector is evident in the existing training package products.

Nationally recognised Sport and Recreation qualifications (as at December 2017)

Fitness Qualifications

- SIS30315 Certificate III in Fitness
- SIS40215 Certificate IV in Fitness
- SIS50215 Diploma of Fitness

Community Recreation Qualifications

- SIS31015 Certificate III in Aquatics and Community Recreation

Outdoor Recreation Qualifications

- SIS20213 Certificate II in Outdoor Recreation
- SIS30413 Certificate III in Outdoor Recreation
- SIS40313 Certificate IV in Outdoor Recreation
- SIS50310 Diploma of Outdoor Recreation

Sport Qualifications

- SIS20412 Certificate II in Sport Career Oriented Participation
- SIS20513 Certificate II in Sport Coaching
- SIS30613 Certificate III in Sport Career Oriented Participation
- SIS30713 Certificate III in Sport Coaching
- SIS30813 Certificate III in Sports Trainer
- SIS30913 Certificate III in Sport Officiating
- SIS40512 Certificate IV in Sport Coaching
- SIS40612 Certificate IV in Sport Development
- SIS50512 Diploma of Sport Coaching
- SIS50612 Diploma of Sport Development

Sport and recreation qualifications

- SIS10115 Certificate I in Sport and Recreation
- SIS20115 Certificate II in Sport and Recreation
- SIS30115 Certificate III in Sport and Recreation
- SIS40115 Certificate IV in Sport and Recreation
- SIS50115 Diploma of Sport and Recreation Management.

Registered Training Organisation scope of registration

Table 1 indicates the number of Registered Training Providers (RTOs) with Sports and Recreation qualifications on scope. This data is current as at 20th of December 2017, as per the listing on the National Register of VET (www.training.gov.au).

Code	Qualification name	No of RTO on scope
SIS30315	Certificate III in Fitness	115
SIS40215	Certificate IV in Fitness	43
SIS50215	Diploma of Fitness	35
SIS31015	Certificate III in Aquatics and Community Recreation	20
SIS20213	Certificate II in Outdoor Recreation	67
SIS30413	Certificate III in Outdoor Recreation	48
SIS40313	Certificate IV in Outdoor Recreation	39
SIS50310	Diploma of Outdoor Recreation	17
SIS20412	Certificate II in Sport Career Oriented Participation	6
SIS20513	Certificate II in Sport Coaching	41
SIS30613	Certificate III in Sport Career Oriented Participation	11
SIS30713	Certificate III in Sport Coaching	20
SIS30813	Certificate III in Sports Trainer	12
SIS30913	Certificate III in Sport Officiating	0
SIS40512	Certificate IV in Sport Coaching	11
SIS40612	Certificate IV in Sport Development	13
SIS50512	Diploma of Sport Coaching	8
SIS50612	Diploma of Sport Development	46
SIS10115	Certificate I in Sport and Recreation	10
SIS20115	Certificate II in Sport and Recreation	77
SIS30115	Certificate III in Sport and Recreation	64
SIS40115	Certificate IV in Sport and Recreation	11
SIS50115	Diploma of Sport and Recreation Management	21

Source: Training.gov.au. RTOs approved to deliver this qualification. Accessed 20th December 2017.

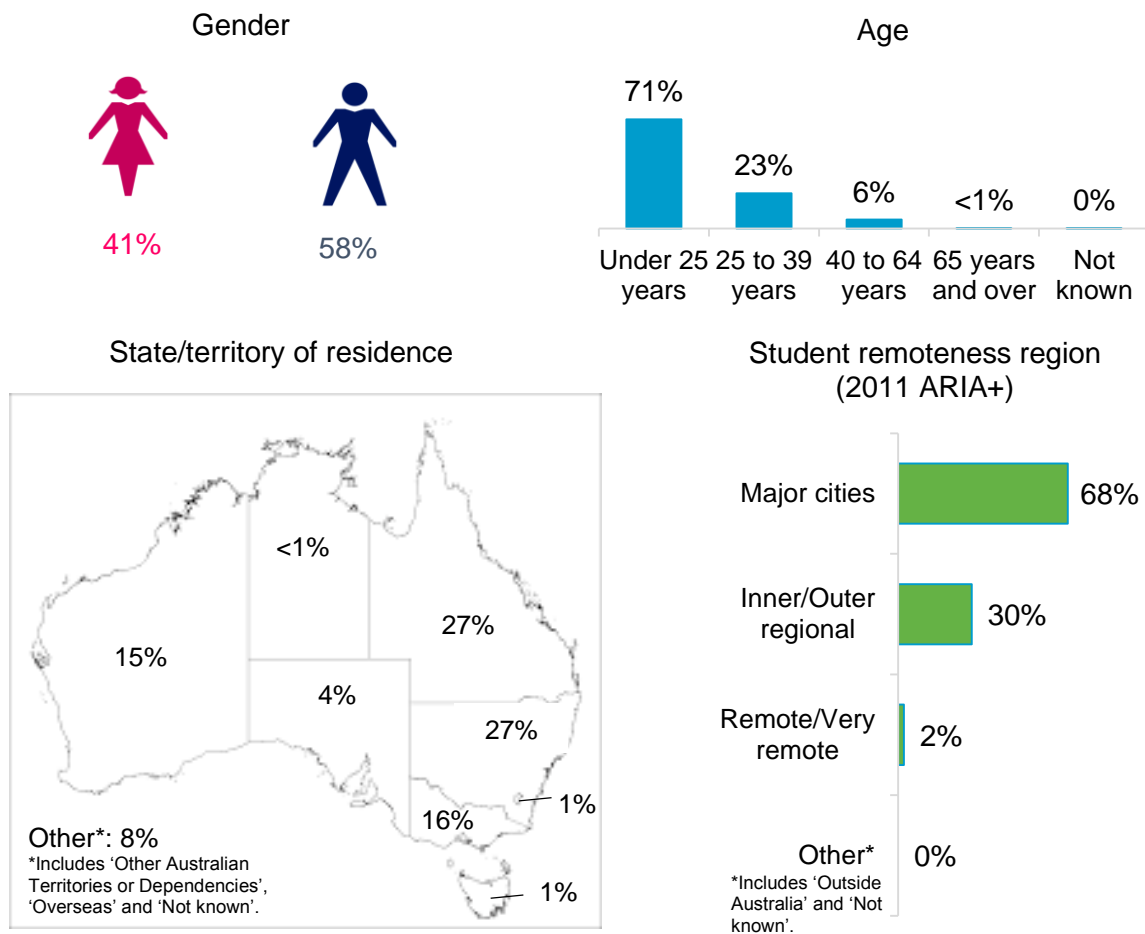
Qualification Enrolments

General notes on statistics:

1. Enrolment and completion data is sourced from NCVER VOCSTATS (Program enrolments and completions 2014 – 2016), accessed October 2017.
2. It is important to note that not all training providers are currently required to submit enrolment and completion data therefore some figures presented may underrepresent the true count of enrolments and completions for a qualification. From 2018, all training providers will be required to submit data therefore current discrepancies noted in the national NCVER figures and actual attendance should be minimal in future releases. The data presented in this report is shown for indicative purposes.
3. Figures reflect public and private RTO data.
4. 'E' represents Enrolment.
5. For a more complete indication, superseded qualifications from the 2012 Training Package, and their respective enrolment data, are included because enrolments in qualifications updated in 2016 would not be captured during the data collection period.

2016 ENROLMENT SNAPSHOT

SPORT AND RECREATION TRAINING PACKAGE



Source: NCVER VOCSTATS (Program enrolments 2016 by various breakdowns) Base count n=59,464

Sport and Recreation Qualifications- Enrolments 2016

Qualification	E	2014	2015	2016	Total
SIS30315 Certificate III in Fitness	E	0	7	8885	8892
SIS30310 Certificate III in Fitness	E	20831	2346	666	23843
SIS30313 Certificate III in Fitness	E	11819	31443	20679	63941
SIS40215 Certificate IV in Fitness	E	0	3	2711	2714
SIS40210 Certificate IV in Fitness	E	22411	20340	15582	58333
SIS50215 Diploma of Fitness	E	0	0	41	41
SIS50213 Diploma of Fitness	E	439	1452	1280	3171
SIS50210 Diploma of Fitness	E	997	85	23	1105
SIS31015 Certificate III in Aquatics and Community Recreation	E	0	0	423	423
SIS30113 Certificate III in Aquatics	E	8292	5800	5044	19136
SIS30110 Certificate III in Aquatics	E	14024	11675	4582	30281
SIS30213 Certificate III in Community Activity Programs	E	45	1366	990	2401
SIS30210 Certificate III in Community Activity Programs	E	1236	103	1	1340
SIS20213 Certificate II in Outdoor Recreation	E	2497	7124	7874	17495
SIS30413 Certificate III in Outdoor Recreation	E	505	1194	1674	3373
SIS40313 Certificate IV in Outdoor Recreation	E	111	951	785	1847
SIS50310 Diploma of Outdoor Recreation	E	156	139	140	435
SIS20412 Certificate II in Sport Career Oriented Participation	E	318	195	567	1080
SIS20513 Certificate II in Sport Coaching	E	3464	6440	7374	17278
SIS30613 Certificate III in Sport Career Oriented Participation	E	93	200	265	558
SIS30713 Certificate III in Sport Coaching	E	442	831	619	1892
SIS30813 Certificate III in Sports Trainer	E	65	162	228	455
SIS30913 Certificate III in Sport Officiating	E	0	0	0	0
SIS40512 Certificate IV in Sport Coaching	E	319	530	378	1227
SIS40612 Certificate IV in Sport Development	E	294	318	268	880
SIS50512 Diploma of Sport Coaching	E	213	330	297	840
SIS50612 Diploma of Sport Development	E	1616	2546	2183	6345
SIS10115 Certificate I in Sport and Recreation	E	0	0	608	608

SIS20115 Certificate II in Sport and Recreation	E	0	0	2127	2127
SIS30115 Certificate III in Sport and Recreation	E	0	0	484	484
SIS40115 Certificate IV in Sport and Recreation	E	0	0	151	151
SIS50115 Diploma of Sport and Recreation Management	E	0	0	35	35

Source: NCVER VOCSTATS, TVA program completions 2016, accessed November 2017

Peak bodies and key industry organisations

The below list represents a range of organisations that perform a variety of key roles in this sector. These organisations and their networks are well placed to offer industry insights at the time of training package review. Industry engagement will include a broad and inclusive range of stakeholders beyond those included in this list, as relevant to the nature of training package product review.

- National and State Government departments and agencies
 - Australian Sports Commission
 - State departments and offices for sport and recreation
 - Local governments
 - Department of Defence
 - Department of Education
 - Department of Health
 - Department of the Prime Minister and Cabinet (Indigenous Affairs)
- Peak and industry associations
 - Royal Life Saving Society Australia
 - Australian Council for Swimming and Water Safety Teachers (AustSwim)
 - Coalition of Major Professional and Participation Sports
 - Community Sport Australia
 - Fitness Australia
 - Outdoor Council of Australia
 - Parks and Leisure Australia
 - ACHPER
 - School Sports Australia
 - National and state sporting organisations
- Employee associations
 - Australian Services Union
 - Australian Workers Union
- Large and small employers across metropolitan, regional, rural and remote areas
- Registered Training Organisations, both public and private
- Other stakeholders –
 - ISAC NT
 - Future Now
 - Queensland Fitness Sport Recreation Skills Alliance

Sector Overview

SPORT

The sport industry is made up of a variety of entities that are all largely driven by the widespread popularity of sport in Australia. Over 90% of Australian adults have an interest in sport, with 8.4 million adults and 3 million children participating in sport each year.

The Australian Government makes a significant contribution to Australian sport, with over \$357 million being invested to support sport and recreation activities and facilities in 2016-17.²

In addition significant contributions are made at state and local government levels.

The Australian Sports Commission has published a review focused on the overall sports sector, with a particular emphasis on participation in sport and community level sport.³ Research and analysis for the Intergenerational Review of Australian Sport 2017 includes evidence based statistics quantifying the significance of the industry in terms of numbers of participants, economic contribution and social impacts. The report appendices highlight the complexity of defining “sport” and quantifying its benefits. In 2017 work also commenced on a new National Sport Plan as a long-term strategy for the whole of sport.

Participation in Sport

Concerns have been expressed about trends impacting Australians’ participation in sport and future high performance.⁴

Examples include:

- sport is being increasingly marginalised in schools, with less hours spent on sport and physical education and fewer trained teachers.
- 81% of Australian children are not meeting the recommended activity guidelines, and over 50% of adults are living sedentary or low activity lifestyles, and two-thirds of adults and one-quarter of children are overweight or obese⁵.
- Even for those with active lifestyles, people are increasingly time-poor, challenging traditional club models and the social cohesion they bring.

Some changes proposed by the ‘2017 Intergenerational Review of Australian Sport’ include encouraging more people to increase their participation in sport through modernising sports’ offerings; embedding sport within the school day; and significantly expanding the use of sport in preventative health efforts and strengthening the foundations of the sector by expanding non-government sources of revenue, improving the sector’s use of data and technology, and improving our sports infrastructure, especially at the community level.

² National Sport Plan, Australian Government, <https://www.ausport.gov.au/nationalsportplan>

³ Australian Government 2017, *Australian Sports Commission, Intergenerational Review of Australian Sport 2017*

⁴ Australian Government 2017, *Australian Sports Commission, Intergenerational Review of Australian Sport 2017*

⁵ Australian Government 2017, *Australian Sports Commission, Intergenerational Review of Australian Sport 2017*

FITNESS

The Fitness industry has grown strongly over the past five years.

A range of business models, including niche and targeted offerings, franchising and market consolidation is evident in the fitness industry. The emergence of budget 24-hour gym chains has stimulated the majority of industry growth. Franchises have undergone exceptional growth over the past five years, attracting new customers with their affordability and accessibility. Rising health consciousness and high obesity levels have triggered further growth in gym memberships.

Industry revenue is expected to grow at an annualised 7.5% over the five years through 2017-18, to reach \$2.2 billion. However, increasing market saturation, and forecast declines in consumer sentiment and discretionary incomes are expected to result in slightly slower revenue growth in 2017-18, at an anticipated 2.9%⁶. The major players in this sector include Fitness and Lifestyle Group TopCo which has 30% of the market share⁷. This organisation owns Fitness First, Goodlife Health Clubs and Jetts Fitness. Other players in the sector include Anytime Fitness (15% market share) and Fernwood Women's Health Clubs (5% market share)⁸.

Affordability has been the main factor driving 24 hour gym popularity and a growing number of 24-hour gyms has taken market share away from traditional full-service gyms⁹. Budget 24-hour gyms tend to offer more flexible and affordable contracts, including free cancellations, no minimum terms and the option to pay by direct debit. This competition has caused gym membership prices to fall across the industry, with full-service gyms forced to become more flexible with their contracts in line with changing consumer expectations. Almost a decade on from the entry of 24/7 gyms to the Australian marketplace, there is still a tension among professionals around which model – full-service or limited offerings – best meets the needs of Australian fitness consumers, and a number of industry professionals think that while convenience and low cost has its place, the appeal of personal service cannot be counted out¹⁰.

The range of products and services that are provided in the gym and fitness sector is increasing. Gyms are looking to change the way they operate in order to accommodate a more personalised service. There is an increasing number of types of products including CrossFit, F45, Zumba, Les Mills, HIIT, Pilates and Yoga to name a few that gives the consumer a choice in the type of fitness experience they want to have. The outlook for people undertaking this training is that there are numerous disciplines of fitness instruction and that there is opportunity to constantly learn, evolve and gather new skills within the sector.

The Personal Trainers segment of the industry has also grown strongly. Demand for personal training has been fuelled by rising health consciousness in Australia and a growing interest in weight-loss programs and fitness regimes. Consumers that are motivated to exercise by themselves will often substitute personal training for less expensive options, such as online exercise guides or gym memberships. However, continued health awareness, promoted through TV programs, social media

⁶ IBIS World 2017, R9111 *Gyms and Fitness Centres in Australia*

⁷ IBIS World 2017, R9111 *Gyms and Fitness Centres in Australia*

⁸ IBIS World 2017, R9111 *Gyms and Fitness Centres in Australia*

⁹ IBIS World 2017, R9111 *Gyms and Fitness Centres in Australia*

¹⁰ IBIS World 2017, R9111 *Gyms and Fitness Centres in Australia*

influence and government initiatives, has helped keep industry activities in consumers' minds. Industry revenue in the Personal Trainers segment is expected to increase at an annualised 6.2% over the five years through 2016-17, to \$457.3 million¹¹.

AQUATIC AND COMMUNITY RECREATION

There are over 1300 public swimming pools across Australia and approximately the same amount of Swimming and Water Safety schools. These facilities play a vital role in aquatic skill development, recreation, sport and healthy active lifestyles in the community. Aquatic facilities provide employment opportunities for local people and are essential to the social fabric of the community, particularly in rural and remote communities.

The Australian aquatic industry is diverse with models ranging from local government, state government, non-government organisations and private business all playing a role in providing swimming and water safety education and safe sporting pursuits. In addition, the Aquatic Industry provides Australians with a safe place at which to familiarise themselves with the water, supported by lifeguards, good visibility and marked depths. This enables visitors to aquatic facilities to develop their aquatic survival skills in a low risk environment and to develop confidence in the water before being exposed to more hazardous open water aquatic recreation.

The Aquatic industry has performed modestly over the past five years, with a large part of its growth driven by rising spectator sport participation and increasing expenditure on recreational and cultural activities. Public aquatic centres generate the most amount of economic benefit within this subsector in terms of value to the community and the healthcare system. Public aquatic facilities enable Australians to engage in more than 130 million hours of vigorous exercise each year. This activity generates direct economic value, particularly in the form of patrons' improved future health and reductions in health care expenditure, which is estimated to be \$2.35 billion each year¹².

These benefits from public aquatic facilities are additional to the revenue they generate and to their many intangible benefits including a sense of community, social capital, access to water safety education and patron enjoyment.

OUTDOOR RECREATION

The Outdoor Recreation sector includes nature-based tourism, camps and outdoor education, adventure therapy, and a full range of outdoor recreational activities, such as cycling, fishing, bushwalking, canoeing, surfing, climbing and many others. While some of these activities may be considered a sport, there are many people who participate in them without association with a team, club or competition. Typically the natural environment is a central component of an outdoor recreational activity.

¹¹ IBIS World 2017, OD4195 *Personal Trainers in Australia*

¹² Barnsley, P. Peden, A. Scarr, J. (2017) *Economic Benefits of Australia's Public Aquatic Facilities*, Royal Life Saving Society – Australia, Sydney

2 Australian Water Safety Council (2016) *Australian Water Safety Strategy 2016-2020*. Australian Water Safety Council, Sydney

The size and scale of the outdoor recreation sector is often underestimated as no quantifiable national data is available. However, New South Wales and Victoria have commissioned research into the economic value of the sector in the last few years and the need for national statistics has been prioritised by this industry.

These research studies show that nature-based outdoor activities add \$15.2 billion per year to the New South Wales and Victorian economy, supporting 152,00 jobs.¹³ Across both states adults participate in nature based outdoor recreation 99 million times in a year.

Increasingly, the evidence is showing a vibrant and growing outdoor recreation economy, for example there was an estimated 10.3 million domestic travellers who participated in a form of bush/rain forest walk from March 2015 to March 2016. During the same period it is estimated that international visitors to national parks increased by 13%. International visitors also displayed a 23% increase in participation in windsurfing, sailing and kayaking during the same period¹⁴.

Challenges and Opportunities

Integration of sport, fitness and recreation activity with the health and wellness sectors

An increasing range of activities are now evident in gyms and fitness facilities in response to the demand for services for specific demographic groups such as older people, youth, health issues, as well as those seeking health and lifestyle activity such as yoga, mindfulness, boxing & various combinations in customised plans. The increased range of services designed for population groupings is a worldwide trend.

Increasingly sedentary lifestyles have contributed to Australia's rising obesity rates. As people are living longer, there are many who are living with chronic conditions and this contributes to the need to think differently about the role of sport, fitness and recreation in promoting physical health. The industries also promote the mental health of individuals and the health of society overall by building social cohesion and inclusion, especially in diverse communities and low socio economic demographics.¹⁵

More than one in two adults and nearly one in six children are overweight or obese in OECD countries.¹⁶ Physical literacy levels are declining, with the result that more people are not developing skill necessary to live healthy, active lives and participate in sports.

¹³ Marsden Jacob Report New South Wales nature-based outdoor economy: key estimates and recommendations, prepared for Outdoors NSW and SkillsIQ 16 September 2017; Marsden Jacob Report Victoria's nature-based outdoor economy: key estimates and recommendations, prepared for Outdoors Victoria 21 January 2016;

¹⁴ Australian Industry and Skills Committee, Outdoor Recreation, <https://uat.nationalindustryinsights.aisc.net.au/industries/sport-fitness-and-recreation/outdoor-recreation>, viewed 9 January 2018

¹⁵ Marsden Jacob Report New South Wales nature-based outdoor economy: key estimates and recommendations, prepared for Outdoors NSW and SkillsIQ 16 September 2017; Marsden Jacob Report Victoria's nature-based outdoor economy: key estimates and recommendations, prepared for Outdoors Victoria 21 January 2016;

¹⁶ www.oecd.org/health/obesity-update.htm © OECD 2017

Nature-based Outdoor Recreation

There is a growing bank of research that speaks to the health and wellbeing benefits of participation in nature based outdoor recreation. The estimated value of this benefit in NSW and Victoria is \$745 million in avoided lifetime healthcare costs.¹⁷ These Marsden Jacobs reports highlight in both Victoria and NSW these estimates fail to capture the bulk of the undertakings associated with nature-based outdoor recreation therefore underrepresent the true contribution to the economy.

Contact with nature has been demonstrated to reduce stress, improve attention and replenish mental fatigue. Performing physical activity whilst in a natural environment, termed 'Green Exercise', has also been demonstrated to lead to greater improvements in psychological well-being than physical activity alone. Green exercise can improve mood, self-esteem and connectedness to nature¹⁷.

The opportunity for the workforce is that green exercise and nature based recreation are perceived to have more risk associated with them and therefore will require a professional workforce to help children or adults traverse their chosen recreational or active outdoor pursuit.

Facilitating Physical Activities for Children

Currently most sports programs for children focus on participants acquiring specialised movement skills and applying them in a sporting context, with limited provision to support the exploration of movement and early development of fundamental movement skills (FMS). Children are also not adequately developing across the early foundation stages (early childhood years) before being introduced to community sports¹⁸.

Research has shown that the premature teaching of sport skills before children have mastered FMS can negatively impact on an individual's confidence and performance ability. It can also compromise their desire to participate in sports and physical activity in the future¹⁹. The Australian Sports Commission has developed an Australian Physical Literacy Standard which aims to provide a nationally consistent platform to enable more meaningful engagement between the education, health and sport sectors in engaging children in physical activity.

People who facilitate sport and physical activities with children (be that parents, coaches, volunteers or school teachers) must be adequately equipped in their role – ensuring that children have positive experiences, and participate in safe, supportive, inclusive environments. Skills development programs are an important component of the new standard and the role may include elements from each of the industries in the Sport, Fitness and Recreation sector.

Royal Life Saving through the National Swimming and Water Safety Symposium has made a call to action to strengthen school, vacation and water safety programs in the community. Drowning in children under five increased last year. Tragically 29 children aged 0-4 years drowned in 2016/17, a

¹⁷ Wood, C, Hine, R, and Barton, J, (2011), *The Health Benefits of the Youth Outdoor Experience (YOR) Project*, University of Essex

¹⁸ Australian Government 2017, Australian Sports Commission, Teaching Sport to Children: Discussion paper

¹⁹ Australian Government 2017, Australian Sports Commission, Teaching Sport to Children: Discussion paper

32% increase on the previous year, serving as a sobering reminder to parents and pool owners of the need to constantly 'Keep Watch' around water. The opportunity for swim coaches is that with the increasing awareness of child safety around the pool, parents will want to equip their children with the necessary skills to be able to negotiate time in a pool by sending them to learn to swim classes and structured programs.

Unstructured play in outdoor environments is also important in the development of good health and well-being especially among children. Children who play in natural environments develop physical, emotional and cognitive skills, including functional play skills (running, jumping, throwing, climbing etc.). Nature, whether a forest, seashore, creek, or mountain area, represents a dynamic environment and a stimulating and challenging playground for children²⁰.

"Nature Play Queensland" is a health and fitness initiative to inspire children's outdoor play²¹. This is part of the Recreation, Sport and Arts portfolio which incorporates a broad number of programs targeted at increasing and promoting a range of physical activity across recreation and outdoor activities, sport and health and fitness.²²

As part of the review of the national curriculum the Australia Curriculum Assessment Reporting Authority (ACARA) has created four curriculum connections that allow educators to draw connections between different dimensions of the Australian Curriculum. One of these curriculum connections is outdoor learning. The outdoor learning curriculum connection encourages educators to take their learning outdoors into a natural environment – noting that "students develop the skills and understandings to move safely and competently while valuing a positive relationship with natural environments and promoting the sustainable use of these environments"²³. The outdoor recreation industry can play a part in supporting educators to bring their learning outdoors.

There is an increasing bank of evidence that confirms direct exposure to the natural environment in early/pre-school years provides positive impacts of physical, cognitive and emotional development. Therefore playing outdoors can provide an opportunity for children to develop the FMS skills required to master specific body movements as they transition to school life. Access to and development of green spaces should be a primary consideration for urban development and improvement at a local and state government level.

²⁰ Fjørtoft, Ingunn. (2004). "Landscape as Playscape: The Effects of Natural Environments on Children's Play and Motor Development." Children, Youth and Environments 14(2): 21-44.

²¹ <https://www.qld.gov.au/recreation/health/nature-play>

²² <https://www.qld.gov.au/recreation>

²³ Australian Curriculum Assessment Reporting Authority, <https://www.australiancurriculum.edu.au/resources/curriculum-connections/portfolios/outdoor-learning/>

Cost of Participating in Sport, Fitness and Recreation Activities

There has been increased interest internationally for community models to promote a shift from sport, to sport and physical activity in a community context. The size of Australia and the geographic breadth creates challenges for national strategies for implementation at community levels however it is useful to look at experience of others in implementing successful programs.²⁴

In Australia, many states have established initiatives to assist people with meeting the costs of participating in sport and other physical activity. These initiatives range for voucher systems focused on sport participation to broader based assistance programs at state and regional level.²⁵

Sporting Schools is an initiative designed to help schools to increase children's participation in sport, and to connect them with community sporting opportunities. Sporting Schools leverages the positive influence that an early connection to sport in the school environment has on lifelong participation in sport and physical activity.²⁶

Lack of Consistency in Definitions and Data

AusPlay' is a national populations tracking survey funded and led by the Australian Sports Commission to provide participation data for the sport sector and inform decisions.²⁷

There is further research to do as each sub sectors recognise the importance of evidence based information to influence decision makers, consumers and governments, particularly in respect to prioritising investment and expenditure decisions. Governments and private enterprise recognise that prioritising expenditure requires value propositions and strategic approaches to increasing the participation rates of physical activity at the community, competition, representative and high performance levels and across all sectors.

²⁴ National Sports Convention July 2017, Keynote speakers included Jennie Price, Chief Executive – Sport England, Peter Miskimmin, CEO Sport NZ; <https://www.oecd.org/els/health-systems/Obesity-Update-2017.pdf>

²⁵ See for example; <https://www.qld.gov.au/recreation/sports/funding/getinthegame>; <http://www.sportsvouchers.sa.gov.au/>; <https://sport.nsw.gov.au/sectordevelopment/activekids>;

²⁶ <https://www.sportingschools.gov.au/about>; <http://www.dsr.wa.gov.au/funding>

²⁷

Demand and Supply of Facilities and Infrastructure

The incidence of multipurpose facilities is a reflection of the changing community demands and expectations in relation to sport, fitness and recreation services. These facilities require strategic planning decisions and financial management practices. They may be owned and run by local governments or the private sector however they require significant capital investment and ongoing maintenance. Strategic partnerships are a significant source of investment for facilities and infrastructure to accommodate community participation in sport, fitness and recreation activities. An understanding of operating requirements are critical in predicting the use of facilities and hence the return on investment. Social and economic measures are significant and data is increasingly important across the sector.

Outdoor recreation activities may not be characterised by a reliance on buildings but rather infrastructure including accessibility, land management policy, availability of hygiene and sanitary facilities, transport access and emergency support. Investment in local green spaces and parks in urban and regional areas provides affordable access to active lifestyle choices for everyone within that community. Investment in national and state parks offers a plethora of outdoor recreation choices to the community encouraging interstate, intrastate and international travel.

Risk management strategies and related insurances are also significant to the use and access of public and private facilities.

Access to Facilities

Access to sporting and aquatic facilities is a limiting factor in both metropolitan and regional areas, with the latter being more acute. Local councils who are operating under limited budgets are mainly responsible for providing such facilities. Having such facilities in remote areas can lead to improved health outcomes, enhance the lifestyle of residents and provide a resource for younger people, for the culturally and linguistically diverse communities (CALD) and the older generation. These groups can benefit differently from having access to sporting facilities, as young people will have an outlet for their sporting desires.

The CALD community will benefit by being able to better integrate into the community and for example learn about water safety as these communities are at a greater risk²⁸. Older generations will receive social and health benefits by being able to access sporting facilities to maintain a healthy and active lifestyle. The opportunity for the workforce in this area is to be able to assess the needs of and interact with the diverse client base.

Having access to sporting facilities in rural and remote areas is significantly important as people living in these regions are 15% more likely to be overweight or obese than those living in metropolitan areas²⁹. However, due to the lack of adequate facilities, health concerns in rural and remote areas continues to rise. There is an opportunity for local sporting clubs and councils to form strategies to work towards increasing access to facilities to reap the health and community benefits

²⁸ Royal Life Saving Society, *Annual Report 2017 – A nation free from drowning*

²⁹ Wall, C, SGS Economics and Planning 2015, *Planning to Increase Participation in Sport and Physical Recreation*

it can provide. If this transpires then councils and sporting clubs will need a workforce with diverse skills to engage with the community.

Governance and Ethics

Organisations operating in the industries, are subject to governance structures which need to be effective and appropriate to their functions. Public and consumer confidence in organisations associated with the sector will have a direct impact on participation and strategic goals being met. The industry is supported by a high percentage of volunteer organisations. These organisations are managed by volunteers and often rely on funding, donations and good will of parents to deliver services to their members. Whether at a club, regional or state level these volunteer organisations are subject to governance structures which need to be effective and appropriate for their function. Effective governance structures engender public and consumer confidence and have a direct impact on participation and strategic direction of the club. Effective governance helps ensure more effective decision making, with the organisation demonstrating transparency, accountability and responsibility in the activities undertaken and resources expended.

Best practice guidelines for the governance of sporting organisations have been in place since 2002 and have most recently been revised in 2013 as "Mandatory Sports Governance Principles". Work is being done through the National Sporting Organisations as well as State / Territory Departments of Sport and Recreation to encourage and assist state sporting organisations to adopt similar principles.

Peak bodies like Sport NSW and national organisations like Scouts Australia support the review and development of effective governance structure to minimise reputational risk caused by poor practices.

Integrity in sport incorporates measures to discourage antidoping, match fixing and other forms of corruption. Incidence of these practices have been reported in the media at the highest levels of sports and are regularly featured in various sporting codes in Australia and internationally. The ASC provides resources for customisation by individual organisations in respect to general principles and codes of behaviour, and Australian Sports Antidoping Authority (ASADA) provide information and support, including e - learning courses for Athletes, coaches and other support people, students and sporting organisations.³⁰

The Royal Commission into Institutional Responses to Child Sex Abuse released its Final Report in December 2017. The recommendations include a call for the adoption of national child safeguarding standards. The hearing prompted many sports agencies and associations to review their systems, policies and practices to ensure they are child safe. There is undoubtedly an increased requirement by sport and recreation clubs and associations to have a greater awareness of child abuse, a commitment to child safe practices and the ability to respond to suspicions of harm.

In consultation with the sector, the ASC produced the [Child Safe Sport Toolkit](#) and [Child Safe Sport Process](#), which aim to assist sporting organisations to develop and implement child safe sport policies. The [ASC Child Safe Sport Toolkit Online Course](#) is designed to support personnel in national and state sporting organisations develop their own Child Safe Sport Framework. It outlines the background for the toolkit, what it contains and how to use it and contains some case studies.

³⁰ <https://www.asada.gov.au/>

The Play By The Rules website contains information targeted at sport and recreation clubs regarding child protection in the sport setting, including an online course suitable for players, volunteers, coaches, officials and administrators.

Social Media and Technology

SkillsIQ was commissioned by the AISC to lead the cross-sector project Consumer Engagement via Online & Social Media.³¹ Project research found that internet access has been growing exponentially, and the latest figures (2017) show there are 13.7 million broadband internet subscribers and 26.3 million mobile handset subscribers in Australia.³² Nearly 9 in 10 adults (86%) use the internet at least once a day to perform a variety of work and/or personal-related tasks, including communicating with family, friends and colleagues; banking; online shopping, and researching.³³

There are examples of digital training and marketing services to assist individuals and businesses in the sport sector including athlete brand management, fan base engagement and sports digital marketing.³⁴

Social media has seen the rise of the 'Insta-fit' phenomenon, where fit and attractive people market their exercise and diets to followers on various types of social media. The view of industry on this is mixed as half do not see this fad lasting much longer, while some identify that potential to generate revenue coupled with low barriers to entry makes this an attractive opportunity for many.

All types of fitness professionals (fitness businesses, sole traders, exercise professionals, and even students) admit to concern that the lack of qualifications of many social media fitness personalities is a potential source of damage to the fitness industry. The challenge is for more fitness businesses to find a way to educate the audience in terms the quality of – and the qualifications behind – the advice³⁵.

Social media and internet search engines are providing an opportunity for like-minded people to connect and share resources online – this includes start up groups, local informal groups, trails in the area etc. This is creating challenges for established clubs and groups like bushwalking clubs, canoe clubs and other recreation associations.

The increasing connectivity online is making access to information about health and fitness more easily available to interested parties. There is a proliferation of Apps, online videos and other materials that can be used for training plans, forums to discuss the pros and cons of different exercises for different outcomes, and personal trainers selling training plans to their followers on Facebook, Instagram, and blogs³⁶. This trend is a potential hazard for consumers who would have previously looked to have their health and fitness needs met by going to the gym or engaging a

³¹ SkillsIQ <https://www.skillsiq.com.au/CurrentProjectsandCaseStudies/Consumerengagement>

³² Australian Bureau of Statistics (ABS) 81530DO001_201706 Internet Activity, Australia, June 2017 (Table 1 and 5)

³³ Australian Communication and Media Authority (ACMA) Regional Australia in the digital economy snapshot, June 2015 (Figure 7)

³⁴ <https://sportsgeekhq.com/>

³⁵ Fitness Australia 2016, *Profile of the Fitness Industry in Australia – Trends in Fitness*

³⁶ Fitness Australia 2016, *Profile of the Fitness Industry in Australia – Trends in Fitness*

personal trainer. This has the ability to disrupt the industry and the sector has to determine the best way that fitness and personal training can be delivered in the future (via online rather than face to face). Data analytics offer both consumers and suppliers in the sectors information around targeted programs and needs.

Royal Life Saving is using online and social media platforms to engage and inform the public on issues such as drowning and water safety. An example of this is 'The World's Most Costly', a campaign to urged parents and carers to Keep Watch and actively supervise their kids when at home. The campaign was driven by social media with over 2.2 million views of the video, 6,256 shares, 1,251 comments and 12,473 reactions. The strategy was also supported by a targeted blogger and influencer campaign. Also with 12 million Australians using Facebook every day (1.32 billion internationally), Royal Life Saving have focused their communications through the widely popular social channel. Through Facebook's advanced audience targeting, Royal Life Saving have been able to dedicate communications to key at risk audiences³⁷.

In 2016 the Australian Sports Commission (ASC) instigated the 'Technology in Sport' project to better understand how technology was impacting the Australian sport industry and how the industry needed to respond.³⁸ New and emerging technologies across the sector will require coaches, administrators, volunteers and anyone involved in the area to have the required digital literacy and innovation skills.

Technology plays an increasingly influential and important role in outdoor recreation and adventure. The last 10 years, in particular, have seen a virtual explosion of technological developments in the outdoors, ranging from clothes to equipment such as signalling devices and protective gear. Equipment for outdoor recreation activities is constantly improving and evolving with technology. Generally, equipment is stronger, lighter, and more versatile. Workers who access this type of equipment will need training to ensure that they use the equipment safely and to its full advantage.

With the advent of GPS units, 36-mile radios, PLBs and EPIRBs (personal locator beacons and emergency position indicating radio beacons), satellite telephones, smart phone apps, and increased cellular coverage, technology now allows outdoor enthusiasts to know where they are, how fast they are moving and in what direction, and to signal for help—all at the press of a button³⁹. This can potentially have an impact on the hiking guide industry as consumers who previously would have hired a guide may now feel due their confidence in supporting technology that they can traverse trails themselves. Improved technology has increased the perceived level of safety available to both individuals and groups in the outdoors. These advances in technology have the capacity to provide information about where you are and to signal for help, but are no substitute for preparing for the activity by sourcing maps, appropriate supplies, local knowledge, weather and fire forecast. Also the

³⁷ Royal Life Saving Society Australia (2017), *Annual Report 2016/2017 – A nation free from drowning*

³⁸ Australian Government, Australian Sports Commission 2017, *Connecting Digital and Technology with Australia's Competitive Sport Obsession to achieve world-leading physical activity and high performance objectives*

³⁹ Ewert, A, Sibthorp, R.J, *Impacts of technology in outdoor recreation and adventure*, via <http://www.humankinetics.com/excerpts/excerpts/impacts-of-technology-in-outdoor-recreation-and-adventure> viewed 3/01/2018

Australian geography provides barriers to the effectiveness of some of these devices, and can result in people becoming lost, disoriented, and being in situations they are not prepared for.

Employment Skills and Outlook

Labour force data

Although the sport and recreation industry is fragmented, the statistical data that is available suggests that the industry is significant in terms of number of people participating, direct and indirect employment, contribution to local and state economies and benefit to the community through saved health care costs and social capital

- * The data used in the graphs below should only be used for indicative purposes and always contrasted with contemporary industry specific and segment data where available. Many people who perform roles in the sector as volunteers are not captured in the statistics as their voluntary role would not be nominated as their “occupation” in survey data.
- Clear and consistent national definitions and groupings are not readily available or necessarily reflective of the roles in the industry sectors and segments, however studies within each sector and consultation over time provide evidence of common themes which are applied across the sectors.
- The definitions of the Job Occupations used in the statistics are defined as follows. Due to the significant proportion of volunteers in these roles reporting may significantly underestimate the number of people in these roles who could register other roles as their primary occupation. The data should always be contrasted with other industry and segment and specific data and information where available.

Sports Coaches, Instructors and Officials - Job titles; Diving Instructor, Gymnastics Coach or Instructor, Horse Riding Coach or Instructor, Snow sport Instructor, Tennis Coach, Sports Development Officer, Sports Umpire or Referee, Dog or Horse Racing Official, Other Sports Coach or Instructor, Other Sports Official

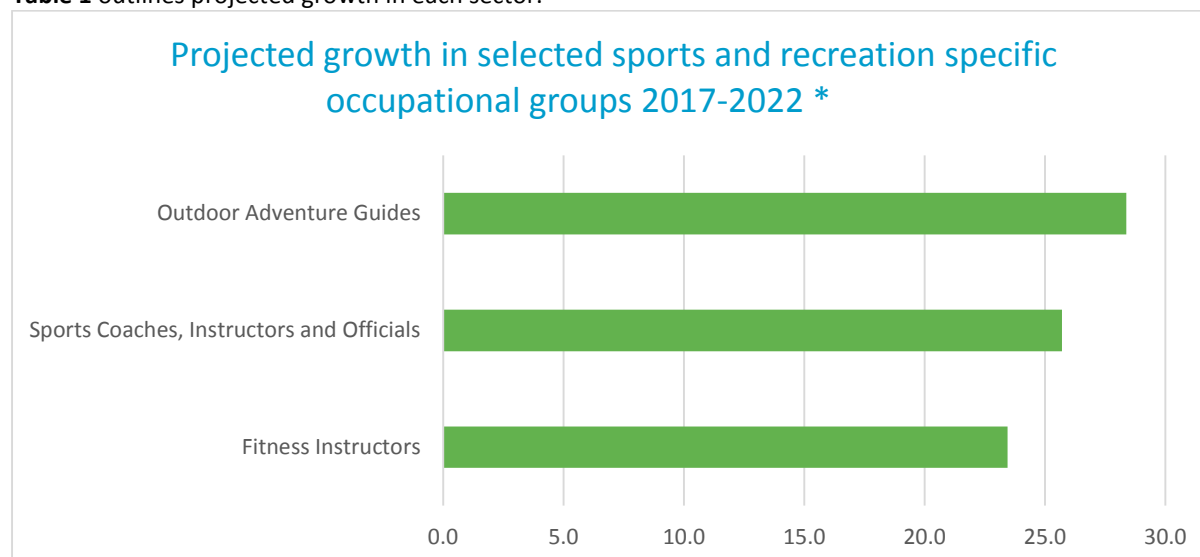
Fitness Instructors - Job Title; Fitness Instructor

Outdoor Adventure Guides - Job Titles; Bungy Jump Master, Fishing Guide, Hunting Guide, Mountain or Glacier Guide, Outdoor Adventure Instructor, Trekking or Bushwalking Guide, White-water Rafting Guide, Other Outdoor Adventure Guides

- For the purposes of this Industry Skills Forecast, specific statistical information has been identified from a range of sources in respect to sport, fitness, community recreation and outdoor recreation.

There is strong growth projected in the 'Sports and Recreation' occupations. The 'Outdoor Adventure Guides' are expected to have 28% growth over the next five years while 'Sports Coaches, Instructors and Officials' (26%), 'Fitness Instructors' (24%) and Sports and Fitness Workers' (23%) are expected to have strong growth over the same period.

Table 1 outlines projected growth in each sector.⁴⁰

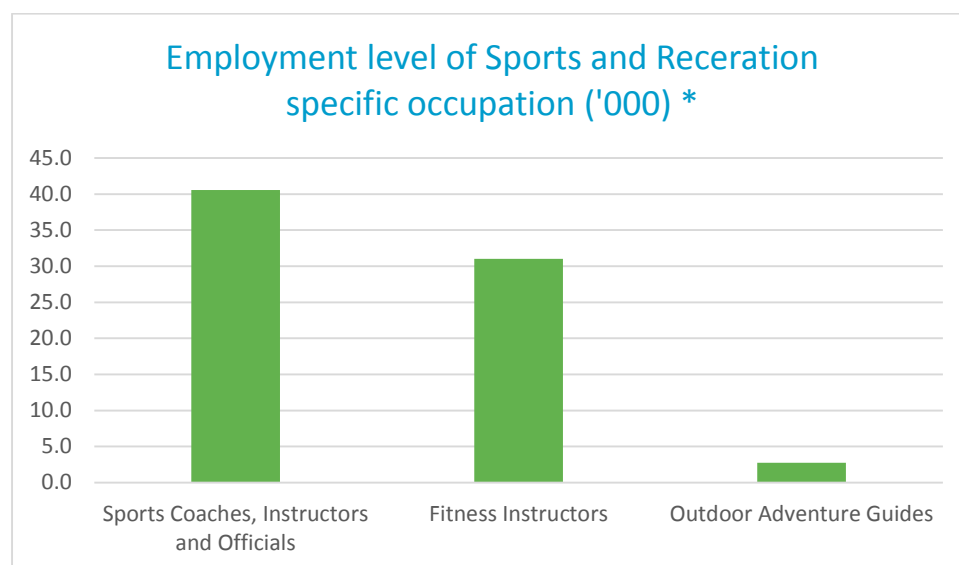


Source: Australian Department of Employment, 2017 Occupational Projections – five years to November 2022

Currently the occupations within this IRC at May 2017 show that 'Sports and Fitness Workers' number 84,500, while Sports Coaches, Instructors and Officials come in at approximately 40,600. A full breakdown can be seen in the table below. Please note that anecdotal information from the Outdoor Recreation sector questions the number included in the Department of Employment projections as not being a true reflection of the workforce.

⁴⁰ data on the 'Employment level' and 'Projected growth' tables, these are derived from the Labour Market Information Portal from the Department of Employment (<http://www.abs.gov.au/ausstats/abs@.nsf/mf/6269.0>). The 2017-2022 projections are based on June 2017 Labour Force Survey data for total employment, the May 2017 Labour Force Survey quarterly employment data and the total employment forecasts and projections published in the 2017-18 Budget.

Table 2 outlines the employment level of each occupation.⁴¹



Source: Australian Department of Employment, 2017 Occupational Projections – five years to November 2022

When looking at specific occupations within the 'Sport and Recreation' sector 'Sports Coaches, Instructors and Officials' showed that the median age for this occupation was 22 years old, the gender split was fairly even (51% men and 49% women). The top industries where job occupations fell within were 'Education and Training (51%)' and 'Arts and Recreation Services' (43%)⁴². New South Wales has the highest workforce numbers followed by Queensland, Victoria and Western Australia for the exercise and sports science workforce. Most of this workforce works full time (60%) with 24% being part time employees. The just under half of the full time workforce earn between \$51,000 and \$70,000⁴³.

Source: Australian Department of Employment, Job Outlook, Sports Coaches, Instructors and Officials, ANZCO ID 4523

For Fitness Instructors the median age was 37 years while females made up 59% of the workforce (males 41%). Most workers within these occupations are employed in "other services" (41%), 29% of the workforce falls within 'Arts and Recreation Services' and 24% within 'Education and Training'. The majority of fitness instructors are based on the Eastern seaboard of Australia in NSW (37%), VIC (24%) and QLD (20%). Most workers in this occupation have attained a Certificate III or IV as their top education level⁴⁴.

Source: Australian Department of Employment, Job Outlook, Fitness Instructors, ANZCO ID 4521

⁴¹ Data on the 'Employment level' and 'Projected growth' tables, these are derived from the Labour Market Information Portal from the Department of Employment (<http://www.abs.gov.au/ausstats/abs@.nsf/mf/6269.0>). The 2017-2022 projections are based on June 2017 Labour Force Survey data for total employment, the May 2017 Labour Force Survey quarterly employment data and the total employment forecasts and projections published in the 2017-18 Budget.

⁴² Australian Government, Job Outlook, <http://joboutlook.gov.au/Occupation.aspx?search=Career&code=4523> viewed 04/01/2018

⁴³ Hetherington, S, (2015) *2015 Workforce Survey Final Report*, Exercise and Sports Science Australia

⁴⁴ Australian Government, Job Outlook <http://joboutlook.gov.au/Occupation.aspx?search=Career&code=4521> viewed 04/01/2018

For 'Outdoor Adventure Guides' the median age for these workers was 37 years. The gender split for this occupation was weighted towards males (70%) while females only made up 30% of the workforce. The main industries that workers within this occupation came under were 'Education and Training' (37%), 'Arts and Recreation Services' (34%) and 'Health Care and Social Assistance' (14%). NSW has the most number of outdoor adventure guides (43%) with VIC (25%) and WA (19%)⁴⁵.

Source: Australian Department of Employment, Job Outlook, Sports Coaches, Outdoor Adventure Guides

Outdoor recreation sector

The size and scale of the outdoor recreation sector is often underestimated as no quantifiable national data is available. However, New South Wales and Victoria have commissioned research into the economic value of the sector in the last few years and the need for national statistics has been prioritised by this industry.⁴⁶

The study shows across NSW and Victoria 113,500 full time equivalents are employed in nature based outdoor recreation. This figure backs up the sectors assertion that 'outdoor adventure guides' make up only a proportion of those employed within outdoor recreation.

<i>Participation by NSW citizens (incidences of active and passive nature-based outdoor activity)</i>	53 million
Hours of physical activity by NSW citizens	47 million
Nature-based outdoor activity expenditures—all sources	\$7.65
(\$ billion 2016)	
Gross value-added (\$ billion 2016)	\$6.7
- Direct	\$4.3
- Indirect	\$2.4
FTEs (2016)	77,300
Direct	57,500
Indirect	19,800
Recreation value (consumer surplus, \$ million 2016)	\$890
Avoided costs to the NSW healthcare system (\$ million 2016)	\$480

⁴⁵ Australian Government, Job Outlook <http://joboutlook.gov.au/Occupation.aspx?search=Career&code=4522> viewed 04/01/2018

⁴⁶ Marsden Jacob Report New South Wales nature-based outdoor economy:key estimates and recommendations, prepared for Outdoors NSW and SkillsIQ 16 September 2017; Marsden Jacob Report Victoria's nature-based outdoor economy:key estimates and recommendations, prepared for Outdoors Victoria 21 January 2016;

<i>Participation in Victoria (incidences of active and passive nature-based outdoor activity)</i>	46 million
- By Victorians over 15	43.5 million
- By Victorian school children	2.5 million
Hours of physical activity	36 million
- By Victorians over 15	31 million
- By Victorian school children	5 million
Nature-based outdoor activity expenditures – all sources (\$ 2014)	\$7.4 billion
Gross value-added (2014)	\$6.2 billion
- Direct	\$4.1 billion
- Indirect	\$2.1 billion
FTEs (2014)	71,000
- Direct	56,000
- Indirect	15,000
Recreation value (consumer surplus \$ 2014)	\$455 million
Avoided costs to the Victorian healthcare system (\$ 2014)	\$265 million

Aquatic Industry Segment Data

The Aquatic Industry is one of the largest employers in the Sport and Recreation Sector with an estimated 40,000 new employees trained in skills such as Pool Lifeguard, Swimming and Water Safety Teacher, Aquatic Technical Operators and Aquatic Exercise Instruction every year.

The increased demands on facility managers to improve safety standards and keep abreast of industry best practice can be difficult and frequently time consuming and at times perceived to be conflicting to the customer engagement and fulfilment. Often, the skills required to manage safety are not available internally and the building upon foundation skills are an important aspect of the industry.

This is dually recognised by the Australian Water Safety Council which states in its 2016-2020 Australian Water Safety Strategy that 'Workforce development strategies must be developed for both paid and volunteer staff to strengthen skills in risk management, facility safety and drowning prevention to further enhance safety. This should be prioritised for facilities in rural and remote communities where the need is greatest.⁴⁷

⁴⁷ Australian Water Safety Council (2016) Australian Water Safety Strategy 2016-2020. Australian Water Safety Council, Sydney

Diverse Workforce and work arrangements

Attraction and retention

Recent research conducted by Fitness Australia has shown that business models in the industry fluctuate: many businesses still primarily use a contractor rather than employee model. This has many implications for the capacity for new graduates to access support, mentoring, guidance and development in their first 6-12 months post-graduation.

A high turnover of industry professionals means there is limited data to enable workforce development to address this issue or enable longer term solutions to be examined. There is a high number of casual and self-employed professionals in most common job roles.

Improvement of qualification and career pathways may help address industry turnover and help provide longer term professional opportunities and job security/satisfaction.

Volunteers

Volunteers play a critical role in the sport, community recreation and outdoor recreation industries. Volunteering enables connections to others who are different but may have similar interests and values and enhances community identification⁴⁸. Nationally, community sport and recreation relies on 2.3 million volunteers who contribute to running sport and recreation⁴⁹.

Industry reports that training activity targeted at specific volunteer outcomes are met through statements of attainment in specific units of competency, and to a lesser extent, skills sets, rather than full qualifications. Many volunteers are employed in completely unrelated sectors so their employment and training outcomes in this sector is understated.

Women in Sport

The Women Leaders in Sport (WLIS) program is an Australian Government initiative that is managed by the Australian Sports Commission (ASC) in partnership with the Office for Women.

The objective of the WLIS program is to provide women with development opportunities to reach their leadership potential in the sports industry.⁵⁰ As with many industries the ratio of women in leadership positions in many sports is disproportionate to their participation.

Many sports have targeted programs to increase women's participation in sports where they have been underrepresented. State initiatives also target increasing female participation rates more broadly in physical activity.

⁴⁸ Walsh, L., & Black, R. (2015). *Youth volunteering in Australia: An evidence review*. Report prepared for the Australian Research Alliance for Children and Youth. Canberra: ARACY.

⁴⁹ Australian Government, Australian Bureau of Statistics, Value of Sport, Australia 4156.0.55.002, 2013

⁵⁰ https://www.ausport.gov.au/ais/grants_and_funding/women

Future Skills needs

The recent data and research indicates that future workforce skills will revolve around STEM (Science, Technology, Engineering and Maths) and 'soft skills'. Soft skills include things like communication, teamwork, problem solving, emotional judgement, professional ethics and global citizenship. Deloitte Access Economics forecasts that two-thirds of jobs will be soft skill intensive by 2030⁵¹. For sports and fitness instructors it is important that they have the skills to effectively communicate, listen, have empathy, honesty, integrity and be adaptable⁵². Flexible and personalised service demands have changed the expectations of professionals working in the fitness sector.

Poor coaching at the community sport level is a major factor in children dropping out of sport. Getting coaches qualified either through the VET system or through the various accreditation pathways of national sporting organisations remains important. Significant resources are available to National Sporting Organisations, to establish and maintain coaching frameworks and more active learning. Sports are reporting a shift from one-off education towards programs to deliver ongoing professional development and support, with face to face components. A new role is emerging, that of the 'Coach Developer', a person who provides ongoing advice and support to coaches. The ASC has trialled methods to train Coach Developers in a number of pilots with various sports. The results of these pilots are being used to develop resources to assist sporting organisations to train their own Coach Developers. Similar trends have been reporting internationally.⁵³

National Sporting Organisations are increasingly focussed on developing the 'How to coach' skills of their coaching workforces. Generally speaking, the 'What to coach' – for example - skills, drills and tactics is either well known by the coach or easily obtainable online or via manuals. The 'How to coach' requires an active learning approach, which is now being delivered by a number of sports.

For the outdoor workforce skills such as leadership, emotional perception, inter-personal connection, resilience, problem solving, decision making and communication are important as well. As the sector is expected to grow in the coming years it is highly important that relevant training packages for 'Sports and Recreation' include competencies regarding soft skills. These types of skills are included in the existing package and some are currently under review. Where necessary some units may be imported from other training packages

Fitness Australia report that Soft skills such as relationship management, client retention and collaboration across professional disciplines continue to be seen as in demand and currently deficient by employers.

⁵¹ Deloitte Access Economics 2017, *Soft skills for business success*, DeakinCo, May 2017

⁵² Cromack, J, 'What soft skills does a Personal Trainer need?' <http://www.motive8iq.co.uk/blog/training/soft-skills-personal-trainer/>

⁵³ See for example, the 'Coaching Plan for England 2017-21 includes the following statement: 'By 2019, 25% of people in coaching roles will have access to a coach developer or mentor. By 2020, 50% of people in coaching roles will have access to a coach developer or mentor. By 2021, 75% of coaches will have access to a coach developer or mentor

There is also a need for some of the STEM skills to be included in training packages for administrators and sole traders within Sports and Recreation who need financial, budgeting and workforce planning skills to run their businesses. Digital literacy skills will also be required as Technology continues to evolve within the sector and people working in the industry will need to be able to navigate and implement these changes. These types of skills can be imported from other training packages rather than creating specific packages.

Recent surveys conducted by SkillsIQ in preparing for current training package product reviews surveyed national sports organisations in respect to valued skills in sport.

NSOs were canvassed regarding the inclusion of eight ASC identified priority skills areas with strong support received for their inclusion as essential competencies within the relevant qualifications.

Priority skills areas identified - child protection, diversity and inclusion ,drugs in sport, harassment and discrimination, integrity in sport, mentoring skills, presenting skills sports governance. These principles are being incorporated across training package products currently under review.

Generic Skills Ranking

Note: The 12 generic skills listed above, including the descriptors, were provided by the Department of Education and Training for ranking purposes. For the 2018 ranking exercise, an 'Other' generic skill option was included in the list to capture any additional key skills for an industry. Please note in this case, no other generic skills were identified.

1	COMMUNICATION / COLLABORATION / SOCIAL INTELLIGENCE	Ability to understand/apply principles of creating more value for customers and collaborative skills. Ability to critically assess and develop content with new media forms and persuasive communications. Ability to connect in a deep and direct way.
2	CUSTOMER SERVICE / MARKETING	Ability to interact with another human being, whether helping them find, choose or buy something. Ability to supply customers' wants and. Ability to manage online sales and marketing. Ability to understand and manage digital products.
3	MANAGERIAL / LEADERSHIP	Ability to effectively communicate with all functional areas in the organisation. Ability to represent and develop tasks and processes for desired outcomes. Ability to oversee processes, guide initiatives and steer employees toward achievement of goals.
4	LEARNING AGILITY / INFORMATION LITERACY / INTELLECTUAL AUTONOMY	Ability to identify a need for information. Ability to identify, locate, evaluate, and effectively use and cite the information. Ability to develop a working knowledge of new systems. Ability to work without direct leadership and independently.
5	DESIGN MINDSET/ THINKING CRITICALLY / SYSTEM THINKING / PROBLEM SOLVING	Ability to adapt products to rapidly shifting consumer tastes and trends. Ability to determine the deeper meaning or significance of what is being expressed via technology. Ability to understand how things that are regarded as systems influence one another within a complete entity, or larger system. Ability to think holistically.
6	LANGUAGE, LITERACY & NUMERACY (LLN)	Foundation skills of literacy and numeracy.
7	ENTREPRENEURIAL	Ability to take any idea and turn that concept into reality / make it a viable product and/or service. Ability to focus on the next step / closer to the ultimate goal. Ability to sell ideas, products or services to customers, investors or employees etc.
8	TECHNOLOGY AND APPLICATION	Ability to create/use of technical means, understand their interrelation with life, society, and the environment. Ability to understand/apply a scientific or industrial processes, inventions, methods. Ability to deal with mechanisation/ automation / computerisation.
9	FINANCIAL	Ability to understand and apply core financial literacy concepts and metrics, streamlining processes such as budgeting, forecasting, and reporting, and stepping up compliance. Ability to manage costs and resources, and drive efficiency.
10	ENVIRONMENTAL / SUSTAINABILITY	Ability to focus on problem solving and the development of applied solutions to environmental issues and resource pressures at local, national and international levels.
11	DATA ANALYSIS	Ability to translate vast amounts of data into abstract concepts and understand data based reasoning. Ability to use data effectively to improve programs, processes and business outcomes. Ability to work with large amounts of data.
12	STEM Science, Technology, Engineering and Maths (STEM)	Sciences, mathematics and scientific literacy

Key Drivers for Change and Proposed Responses

Sport and Outdoor Recreation Industries

Training package products related to the Sport and Outdoor Recreation sectors are currently undergoing a significant update. This has been in part due to the requirement to implement the standards for training package products and will ensure that these qualification are adjusted to meet changing industry needs and provide current and relevant skills.

The update work has three components, one of which has been completed and two which will be completed in 2018.

The update of equine related training package products has been endorsed by the Australian Industry and Skills Committee (AISC) and is now complete.

The update of all remaining Outdoor Recreation Training Package Products and Sport Training Package Products is ongoing with anticipated endorsement to the AISC

At this stage no new work is proposed for these sectors.

Fitness industry

In the period since the SIS training package products being endorsed in 2015, industry has raised a number of significant issues in respect to the alignment of the qualifications with the key job roles in the sector. In particular, there is increasing demand for professionals that can fulfil multiple roles in a business and undertake a range of programs such as gym floor or client orientation duties along with personal training, group training or outdoor training services.

The need for a diverse range of exercise services to meet the demands of a diverse range of client populations is an important way to support future industry growth into new market segments and flexible and personalized service is a key strength.

The qualifications underpinning Group Exercise, Aqua and Personal are well supported and the need for a skill set for aqua instructors has been identified.

Training package products play an important role in ensuring consistency in skills standards in the Fitness industry, and with the rapid changes in the industry there is an identified need to update the training package products.

For example industry research has noted the potential for a Leader skillset to support program development for varied populations and business models. The continued demand for outdoor services has highlighted the need for requirements to focus on a range of broad aspects of the instructor roles including the proper use of public space, understanding environmental impact, legal/regulatory/risk management skills and the capacity to build relationships with public stakeholders.

Proposed Schedule of Work

2018-19 Project Details

2018-19	Update Fitness training package products	<p>The IRC proposes to update the following qualifications and any associated skill sets and Units of Competency relating to job roles in the fitness industry</p> <ul style="list-style-type: none">• SIS30315 - Certificate III in Fitness• SIS40215 - Certificate IV in Fitness• SIS40215 - Diploma of Fitness
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2018-19 Project Details

2018 - 2019	Update Aquatic Instructor training package products	<p>The IRC proposes to update Units of Competency relating to job roles in the aquatics industry and establish a skill set to align with the job role of the aquatic instructor</p>
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Project Title	Update Fitness Training Package Products
Description	<p>Qualifications will be reviewed to ensure Training Package products meet the requirements of industry growth and credibility through standards of professionalism, customer care and service.</p> <p>Training Package products are an important component of establishing professional standards in the Fitness Industry. The changing demand for flexible services within the industry has highlighted the need to update qualifications, strengthen pathways and include skill sets for specific job roles.</p>
Rationale	<p>Refer to Industry Skills Forecast - Key Drivers for Change, page 14.</p> <p>Industry has expressed the need to review entry requirements to ensure unnecessary barriers are not impacting on the supply of a professional labour force; qualification structures and the core and elective requirements in relation to job roles; streams or clusters of units aligned to job functions and; vocational pathways and progression.</p>
Minister's Priorities Addressed	<p>The update of Training Package products proposed support the COAG Industry and Skills Council and used consultation activities and stakeholder engagement to identify:</p> <ul style="list-style-type: none"> • opportunities to identify and remove obsolete Training Package products from the system. • industry expectations for training delivery and assessment to be documented within the Companion Volume Implementation Guide. • opportunities to enhance the portability of skills from one related occupation to another. • opportunities to remove unnecessary duplication within the system and create Training Package products that may have application to multiple industry sectors. • opportunities for the development of skill sets.
Consultation Plan	<p>Key stakeholders identified in the list on page 4 will be consulted. National industry consultation will be conducted with key stakeholders, via face-to-face workshops, webinars and targeted meetings. There will also be opportunities for all interested parties to provide comments online via the SkillsIQ Online Feedback Forum.</p>
Timing - Estimated Duration and Key Dates	Estimated duration: 12-18 months from AISC approval.
Training Package to be Revised	SIS Sport Fitness and Recreation Training Package
Qualifications to be Developed/Revised	<ul style="list-style-type: none"> • SIS30315 - Certificate III in Fitness • SIS40215 - Certificate IV in Fitness • SIS40215 - Diploma of Fitness

Skill sets to be developed/advised	<p><i>New Skill Set to be adapted from an existing qualification elective bank for the role of Aquatic Instructor.</i></p> <p><i>Other Skills Sets for Leadership and outdoor fitness instructors in the Fitness industry to be considered in the update of the Fitness qualifications listed above.</i></p>
Units of Competency to be Developed/Revised	<i>Units of Competency within the Qualifications to be listed here-</i>

Project Title	Update Aquatic Instructor Training Package Products
Description	Qualifications will be reviewed to ensure Training Package products meet the requirements of industry growth and credibility through standards of professionalism, customer care and service.
Rationale	<p>Refer to Industry Skills Forecast - Key Drivers for Change.</p> <p>Industry has expressed the need to update units aligned to the job functions and include as a skills set option.</p>
Minister's Priorities Addressed	<p>The update of Training Package products proposed support the COAG Industry and Skills Council and used consultation activities and stakeholder engagement to identify:</p> <ul style="list-style-type: none"> • opportunities to identify and remove obsolete Training Package products from the system. • industry expectations for training delivery and assessment to be documented within the Companion Volume Implementation Guide. • opportunities to enhance the portability of skills from one related occupation to another. • opportunities to remove unnecessary duplication within the system and create Training Package products that may have application to multiple industry sectors. • opportunities for the development of skill sets.
Consultation Plan	Key stakeholders including those identified in the list on page 4 will be consulted. National industry consultation will be conducted with key stakeholders, via face to face workshops, webinars, one-on-one interviews and there will also be opportunities for all interested parties to provide comments online via the SkillsIQ Online Feedback Forum.
Timing - Estimated Duration and Key Dates	Estimated duration: 12-18 months from AISC approval.
Training Package to be Revised	SIS Sport Fitness and Recreation Training Package
Qualifications to be Developed/Revised	SIS30315 Certificate III in Fitness
Skill sets to be developed/advised	<i>New Skill Set to be adapted from an existing qualification elective bank for the role of Aquatic Instructor.</i>

	<i>Other skills sets for Leadership and outdoor fitness instructors in the Fitness industry to be considered in the update of the Fitness qualifications listed above.</i>														
Units of Competency to be Developed/Revised	<p><i>Units of Competency within the Qualifications to be listed here-</i></p> <ul style="list-style-type: none"> • The following units of competency to be updated for inclusion in a new skill set for Aqua Instructor <p>Group A - Aqua Exercise Instructor</p> <table> <tr> <td>BSBRK401</td> <td>Identify risk and apply risk management processes</td> </tr> <tr> <td>HLTAID003</td> <td>Provide first aid</td> </tr> <tr> <td>HLTWHS001</td> <td>Participate in workplace health and safety</td> </tr> <tr> <td>SISCAQU002</td> <td>Perform basic water rescues</td> </tr> <tr> <td>SISCAQU008</td> <td>Instruct water familiarisation, buoyancy and mobility skills</td> </tr> <tr> <td>SISFFIT008</td> <td>Instruct water-based fitness activities</td> </tr> <tr> <td>SISFFIT022</td> <td>Instruct aquatic sessions for specific population groups</td> </tr> </table> <p>These units are currently listed as Group A electives in the SIS30315 Certificate III in Fitness</p>	BSBRK401	Identify risk and apply risk management processes	HLTAID003	Provide first aid	HLTWHS001	Participate in workplace health and safety	SISCAQU002	Perform basic water rescues	SISCAQU008	Instruct water familiarisation, buoyancy and mobility skills	SISFFIT008	Instruct water-based fitness activities	SISFFIT022	Instruct aquatic sessions for specific population groups
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IRC Sign-off

The 2018 Industry Skills Forecast will be signed off by the IRC Chair before submission to the AISC.