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STAKEHOLDERS



OUTCOMES



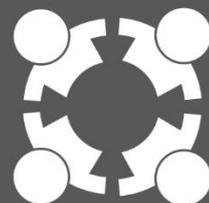
INTEGRITY



BOLDNESS



TEAMWORK



Sport and Recreation
Industry Reference Committee
2019 Industry Skills Forecast
DRAFT

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Administrative Information

Industry Reference Committee (IRC)

Sport and Recreation

The Sport and Recreation Industry Reference Committee (IRC) is responsible for ensuring that nationally recognised qualifications deliver the skills and knowledge required to equip the sectors under its remit with a highly skilled workforce. The sectors under its scope include sport, fitness, aquatic and community recreation and outdoor recreation.

Skills Service Organisation (SSO)

SkillsIQ Limited

SkillsIQ supports 19 IRCs representing diverse 'people-facing' sectors. These sectors provide services to people in a variety of contexts such as customer, patient or client. The IRCs are collectively responsible for overseeing the development and review of Training Package Products, including qualifications, serving the skills needs of sectors comprising almost 50 per cent of the Australian workforce.

SkillsIQ's Industry Reference Committees (IRCs)

- Aboriginal and Torres Strait Islander Health Worker
- Aged Services
- Ambulance and Paramedic
- Children's Education and Care
- Client Services
- Community Sector and Development
- Complementary Health
- Dental
- Direct Client Care and Support
- Disability Support
- Enrolled Nursing
- First Aid
- Local Government
- Personal Services
- Public Sector
- Sport and Recreation
- Technicians Support Services
- Tourism, Travel and Hospitality
- Wholesale and Retail Services.

"It takes skill to make a difference.

We will only get skilled, valued and rounded workers when training provider, employee and employer are connected in their views on continuous learning."

SkillsIQ's Cross-Sector Skills Committee

IRC Sign-off

Sign-off of this Industry Skills Forecast and Proposed Schedule of Work has been confirmed by the Sport and Recreation Industry Reference Committee.

Jeffrey Lehrer

Chair

A. Skills Forecast

A.1 Sector Overview

Introduction

The Vocational Education and Training (VET) Training Package supported by the Sport and Recreation IRC covers the following sub-sectors: Sport; Fitness; Aquatic and Community Recreation and Outdoor Recreation (see **Figure 1**).

Figure 1: Sport and Recreation Training Package – Overview of Sectors



While the public profile of the industry is 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 sub-sectors also report an overlap with the health and wellbeing industries.

Workers across all sub-sectors perform a variety of multi-levelled and multi-skilled job roles. There can be variance in data due to challenges in collection, reporting and classification systems as people engaged in the sectors can have different roles, and under different arrangements. This forecast draws on a range of sources to convey meaningful data and highlight the nature of contemporary research in the sub-sectors.

The Sport and Recreation sub-sectors are described as follows.

Sport

Sport is a popular practice with Australians, and the variety of sports activities can cater to a range of demographics and tastes. Over 90% of Australian adults have an interest in sport, with 8.4 million adults and 3 million children participating in sport each year. In the 2019-20 Federal Budget, the Australian government provided **one of the largest funding packages for the sport sector in years**, with an investment of \$385.4 million for sport and physical activity.¹ Some of the projects the investment will fund include community participation activities, upgrading community sporting facilities, expanding school and community infrastructure programs, and extending the national Sporting Schools program to 2020. These community-oriented investments into sport will be met by the 63% of children across the country who participate in an organised physical activity outside of school hours at least once per week (25% of children participate at least three times per week).²

Job roles in the sport sub sector can represent a range of multi-levelled jobs and functions, including:

Sport

- Athlete
- Assistant coach
- Sports trainer
- Sports official
- Sports coach

¹ Australian Sports Commission (AIS) (2019) *Sport Australia welcome major boost in sport funding* [Available at: https://www.sportaus.gov.au/media_centre/news/sport_australia_welcomes_major_boost_in_sport_funding] [Accessed 9 April 2019]

² Australia Sports Commission (2018) *AusPlay Focus Children's Participation in Organised Physical Activity Outside of School Hours*

- Sports development officer
- Sports development manager
- Sports event manager
- Team manager
- High performance coach
- Leisure assistant
- Community activities officer
- Recreation officer
- Leisure services officer
- Aquatic operator
- Competition manager
- Sports program officer
- Community services program manager
- Asset and facility manager
- Coordinator of volunteer work
- Community recreation centre manager.

Sport and Recreation

- Facility assistant
- Aquatic leisure centre assistant
- Community recreation activity assistant
- Groundsperson

IBISWorld data sources quote that the sport sub-sector comprises of nearly 60,000 workers³, Ausplay statistics estimate that there are approximately 1.5million people who identify themselves as coaches, instructors or teachers of sport.⁴ A recent report in respect to community sport infrastructure refers to 57,000 people being employed directly in community sport.⁵

The variance in the statistics is due in part to the complexity of capturing data about people engaged as volunteers within the sector.

Fitness

The fitness sub-sector comprises of health clubs, fitness centres and gyms that provide a range of fitness and exercise services to a diverse client base. **The fitness sector is expected to generate \$2.5 billion in revenue in 2018-19** and it is expected to continue to grow over the next five years.⁶ The main growth contributors to the industry have included the expansion of budget gym chains and premium functional fitness gyms, as well as an increase in health consciousness and awareness of the benefits of physical activity among consumers.

Key players in the fitness industry are personal trainers who provide one-on-one and small group fitness training. **Over the past five years the personal training profession has experienced a 4.9% annual growth** and it is expected to reach **\$508.5 million in revenue in 2018-19**. The main determinants of future growth in the sector include increased discretionary income and increased health consciousness due to an ageing population and increasing obesity rates.⁷

IBISWorld defines the fitness industry as mainly consisting of health clubs, fitness centres and gymnasiums, with a workforce size of 16,740 workers.⁸ In addition, IBISWorld reports a further 8,955 personal trainers working in Australia.⁹ These statistics can be contrasted with recent research conducted by Fitness Australia which estimates that there are approximately 20,000 exercise

⁴ The Value of Community Sport Infrastructure – Investigating the value of community sport facilities to Australia KPMG (2018)

⁵ Commonwealth of Australia (2018) as represented by the Department of Health, Sport 2030, SportAUS

⁶ IBISWorld (2018) *Industry Report R9111 Gyms and Fitness Centres in Australia* (October 2018)

⁷ IBISWorld (2019) *Industry Report OD4195 Personal Trainers in Australia* (March 2019)

⁸ IBISWorld (2018) *Industry Report R9111 Gyms and Fitness Centres in Australia* (October 2018)

⁹ IBISWorld (2019) *Industry Report OD4195 Personal Trainers in Australia* (March 2019)

professionals.¹⁰ The Department of Jobs and Small Business reports a total of **31,400 fitness instructors**.¹¹ The variance in these statistics is due in part to the definitions applied and the range of circumstances where people within the sector are employed.

Examples of fitness job roles include:

- Aqua instructor
- Gym instructor
- Group exercise instructor
- Exercise instructor
- Personal trainer
- Personal training manager
- Fitness services coordinator.

Aquatic and Community Recreation

Aquatic and community recreation involves community-oriented activities such as sport, aquatics, personal development programs, rehabilitation programs and government initiatives.¹² The main providers of aquatic and community recreation services are state and local governments and commercial leisure centres. Other types of businesses include community-focused organisations such as Police Citizens Youth Club (PCYC) and Young Men's Christian Association (YMCA) and voluntary organisations arranged by various interest groups e.g. religious groups.¹³

On average, Australians visit a public aquatic facility 4.4 times a year.¹⁴ Aquatic facilities promote aquatic skills development, recreation, sport and healthy activity lifestyles in the community. These facilities are also essential to the social fabric of the community, particularly in rural and remote communities.

Public aquatic facilities provide an avenue for Australians to collectively engage in more than 130 million hours of vigorous exercise each year.¹⁵ Participation in physical activity at aquatic facilities **provides a positive economic benefit in the form of improved future health and reduction in health care expenditure, at an estimated value of \$2.35 billion each year.**

The aquatic and community recreation sector involves a range of job roles requiring multi-level and multi-skill applications, including:

- Lifeguard
- Recreation leader
- Swimming teacher.

¹⁰ Figure supplied by Fitness Australia based on professional registration data (2017)

¹¹ Department of Jobs and Small Business (2018) *Occupational Projections – five years to May 2023*

¹² Service Skills SA, *Community Recreation* [Available at: <http://www.serviceskillssa.com.au/careers/community-recreation.html>] [Accessed 11 April 2019]

¹³ Queensland Fitness, Sport & Recreation (QFSR) Skills Alliance, *Community Recreation* [Available at: <https://skillsalliance.com.au/community-recreation/>] [Accessed 11 April 2019]

¹⁴ Royal Life Saving Australia (2017) *Economic Benefits of Australia's Public Aquatic Facilities* [Available at: <https://www.swimaustralia.org.au/docs/rlss-economic-benefits-report-2017.pdf>] [Accessed 9 April 2019]

¹⁵ Royal Life Saving Australia (2017) *Economic Benefits of Australia's Public Aquatic Facilities* [Available at: <https://www.swimaustralia.org.au/docs/rlss-economic-benefits-report-2017.pdf>] [Accessed 9 April 2019]

Outdoor Recreation

The outdoor recreation sub-sector includes:

- nature-based tourism
- camps and outdoor education
- adventure therapy
- outdoor recreational activities-for example - cycling, fishing, bushwalking, canoeing, surfing, climbing.

Typically, the central component of an outdoor recreation activity is the natural environment. A difference between the 'sport' and 'outdoor recreation' sectors is that many individuals participate in outdoor recreation without a team, club or competition. Outdoor learning can also occur in the absence of formal outdoor recreation education, through experiences compared to curriculum adherence.

Nature-based outdoor activities form a major part of the Australian lifestyle. The benefits of participation in these activities are far-reaching and significant. However, the benefits have been largely unquantified. SkillsIQ, in partnership with Marsden Jacob Associates and Cadence Economics, therefore embarked on a study to better understand the nationwide impacts of the nature-based outdoor recreation sector on Australia's economy. The quantitative study involved using a computable general equilibrium (CGE) framework which is recognised as the more comprehensive approach for estimating economy wide impacts. The results showed that the estimated contribution of the outdoor recreation sector to the economy in one year is \$11 billion, which is equivalent to approximately 1% of Gross Domestic Product (GDP). By comparison, Australia's agriculture sector accounts for approximately 2.2% of GDP, and transport 4.5% of GDP. Other estimates show that up to 30,000 full-time equivalent (FTE) workers are employed in the sector.¹⁶

This data is the first of its kind for the outdoor recreation sector in Australia. It begins to develop the picture of the importance of nature-based outdoor activities to the economy. Marsden Jacob notes that this modelling is reliant on a limited set of data and most likely underestimates the benefits of outdoor recreation. It highlights the need for: better data collection and industry intel; realistic funding of VET training for industry skills shortages; financial support to ensure continued industry development and support for advocacy to the community.

In addition, consultation informing the recent update of the Outdoor Recreation Training Package products focused attention on the required skills in contemporary job roles and a national framework where skills shortages can now be quantified with further data investigation.

Examples of the job roles available across the outdoor recreation sub-sector include:

- Outdoor activity assistant
- Outdoor activity guide
- Outdoor activity instructor

¹⁶ Marsden Jacob Associates (unpublished) Nationwide impacts of outdoor recreation. A CGE-based analysis. For further details, please contact SkillsIQ.

- Outdoor recreation assistant
- Outdoor leader
- Outdoor recreation program manager.

Businesses Involved

Businesses operating in the Sport and Recreation sectors outlined above include a range of public and private, small, medium and large enterprises, spread across the country. Some examples and counts of relevant business types involved in hiring workers supported by the Sport and Recreation Training Package across Australia include (2018):¹⁷

- 1,495 sports and recreation facilities
- 1,649 sports and physical recreation clubs
- 5,247 sports instructor businesses
- 4,404 gyms and fitness centres
- 8,219 personal trainer businesses
- 564 hiking and outdoor equipment stores
- 1,679 marine sightseeing tour businesses.

Note: IBISWorld data is reported using IBISWorld's definitions of industries and can be limited in providing a true picture of some sectors' business size. Across the Sport and Recreation sector are business models that vary greatly and can include activities in outdoor spaces in addition to conventional brick-and-mortar settings. The statistics provided are an indicative overview of the sector only.

Stakeholders

Key stakeholders represent a range of organisations that perform a variety of strategic, regulative and operational roles in the Sport and Recreation sectors. Stakeholders play an important role during Training Package reviews by supplying industry insights to ensure updates are in line with industry needs. Examples of stakeholder organisations include:

- Government departments and agencies (Commonwealth and State/Territory-based)
- Peak bodies and industry associations (i.e. across the sectors listed earlier)
- Employee associations
- Registered training organisations both public and private and their representative bodies
- Small, medium and large-sized private and public employers across metropolitan, regional, rural and remote areas, including for-profit and not-for-profit organisations.

¹⁷ Various IBISWorld Industry Reports. *R9113 Sports and Recreation Facilities Operation in Australia* (March 2019); *R9112 Sports and Physical Recreation Clubs in Australia* (November 2018); *P8211 Sports Instructors in Australia* (December 2018); *R9111 Gyms and Fitness Centres in Australia* (October 2018); *OD4195 Personal Trainers in Australia* (March 2019); *OD4032 Hiking and Outdoor Equipment Stores in Australia* (June 2018); *OD5493 Marine Sightseeing Tours in Australia* (June 2018)

Challenges and Opportunities

Note: The findings are based on desk research and SkillsIQ's 2019 Future Skills Survey (conducted between November 2018 and January 2019) which has been filtered to include stakeholders from the Sport and Recreation industries only. Insights and advice from IRC members has also been used to compile and validate the information provided.

➤ Industry and policy reforms

Similarly to many other industries, the Sport and Recreation industry is undergoing a period of change. The significance and role of participating in physical activity to an individual's everyday lifestyle, and the community overall, has been growing steadily over the years and government policy and key industry stakeholders have been evolving accordingly in recognition of this change. At a government level, there is a significant drive towards emphasising the integration of sport, fitness and recreation activity across the community in order to achieve a range of health, social and economic benefits.

Examples of some key strategic and policy developments occurring and impacting the Sports and Recreation industry include:

- in 2018 the Australian Sports Commission was rebranded to Sport Australia and released a national sport plan titled **Sport 2030**. The sport plan sets out a strategy based on strengthening partnerships with Australia's sporting, physical activity, technology, education and corporate community. The plan includes consideration of the support the national body can provide to supporting national sporting organisations in leading their networks in driving participation. Resources relating to integrity, governance and participant and child safety are under review as part of strategic reforms.
- the **Australian Adventure Activity Standard (Aust AAS)** and Good Practice Guides are scheduled to be launched in the last quarter of 2019. The Aust AAS have been designed to provide a national framework to help the outdoor sector to develop effective, responsible, sustainable and safe practices for the delivery of adventure activities to dependant participants throughout the country. Until now individual states have developed voluntary state-based Adventure Activity Standards, with each state focusing on different activities and presenting similar information. While the Aust AAS remain voluntary for the outdoor sector, it is anticipated that many operators will choose to use the information to review their operating procedures, employment and staffing practices. This may impact training qualifications enrolments in the coming years.
- the ongoing development, consultation and/or updates of individual state and territory government-based policy and frameworks with examples including:
 - *Sport and Recreation Common Ground*, 2018 (a Sport and Recreation Strategic Review) (**Western Australian** Department of Local Government, Sport and Cultural Industries)¹⁸
 - *Strategic Plan 2017 – 21* (an initiative setting out a shared vision and future focus for to achieve 'An Active State' (**South Australian** Office for Recreation and Sport)¹⁹

¹⁸ Western Australian Department of Local Government, Sport and Cultural Industries (2018) Sport and Recreation Common Ground [Available at: <https://www.dsr.wa.gov.au/about/plan-for-the-future/sport-and-recreation-common-ground>][Accessed: 30 April 2019]

¹⁹ South Australian Office for Recreation and Sport (2018) Strategic Plan 2017-21 [Available at: https://www.dpti.sa.gov.au/_data/assets/pdf_file/0004/326407/ORS_Strategic_Plan_Flyer_2017-2021.pdf][Accessed 30 April 2019]

- *Queensland Sport & Active Recreation Strategy 2019 – 2019* (discussion paper on Strategy for consultation) (Queensland Government Department of Housing and Public Works)²⁰
- the *Office of Sport Strategic Plan 2018 – 2022* (a plan which sets out state priorities to achieve ‘A vibrant and valued sport and active recreation sector that enhances the lives of people of NSW’) (New South Wales Government Office of Sport)²¹

Employers and key stakeholders need to stay abreast of the national and state or territory-level developments to ensure *all* industry participants are working towards achieving the same objectives.

➤ **Skills shortages**

Industry have indicated that they are experiencing challenges in accessing skilled and qualified workers to fill vacancies. A *Future Skills & Workforce Needs Research Report* (May 2018) published by Queensland Fitness, Sport, Recreation Skills Alliance (QFSR Skills Alliance) specifically highlighted that key workforce shortages being experienced across the state included:²²

- | | |
|--|-----------------------------|
| • swimming teacher | • fitness instructor |
| • sports official | • sports administrator |
| • sports development officer and manager | • aquatic centre instructor |
| • sports coach and instructor | • team manager. |

Demand for these positions is expected to stay strong in the future.

Sports and recreation have collectively evolved considerably over the years and some of the key skills and knowledge gaps being reported represent a combination of technical and ‘soft’ skills including:

- Communication
- Online and social media
- Marketing
- Problem solving
- Initiative and enterprise (i.e. small business management)
- Sports administration.

➤ **Technology including online and social media**

Technology has had a significant impact in each of the sub sectors particularly in respect to:

- how people and communities can share information, communicate and schedule and report on activities
- track personal activity, training and health indicator data (e.g. via mobile Apps)
- collection and use of safety data and information related to navigation and activity conditions

²⁰ Queensland Government Department of Housing and Public Works (2018) *Queensland Sport & Active Recreation Strategy 2019-2029 Discussion Paper* [Available at: <http://www.hpw.qld.gov.au/SiteCollectionDocuments/DiscussionPaperQueenslandSportActiveRecreationStrategy.pdf>] [Accessed 30 April 2019]

²¹ New South Wales Government Office of Sport (2018) *Office of Sport Strategic Plan 2018-2022* [Available at: <https://sport.nsw.gov.au/sites/default/files/OoS-Strategic-Plan-2018-2022.pdf>] [Accessed 30 April 2019]

²² Queensland Fitness, Sport, Recreation Skills Alliance (QFSR Skills Alliance) (2018) *Research Report Jobs Queensland Future Skills & Workforce Needs Fitness, Sport, Recreation & Racing Sectors*. May 2018

- Access and use of customer /client focused information in the fitness subsector including niche or individual services with a unique rather than group focus.

It has never been more imminent for businesses in the industry to embrace social media and online platforms as they are effective channels for businesses to:²³

- advertise and promote
- engage with customers
- grow a customer base
- increase sales; and
- be seen to be with the times.

A workforce equipped to support the industry to engage with customers via social media and online platforms and use technology in work systems and processes is essential. In Australia, there are currently 15 million monthly active users of Facebook, 9 million on Instagram and 6.4 million on Snapchat.²⁴ Almost eight in ten people now use social media daily and it is increasingly embedded into the daily lives and behaviours of households. The Sport and Recreation sector has been a dominant adopter of online and social media platforms when compared to other industries, with health, wellbeing and activity-based mobile Apps particularly popular with the community as a means of monitoring respective targets (e.g. number of steps taken, time spent participating in a sport, calorie intake etc.).

A workforce equipped to support the industry to engage with customers via social media and online platforms and build a presence is important. Workforce skills training is therefore essential and SkillsIQ is taking forward an Australian Industry Skills Committee (AISC) cross-sector project, *Consumer Engagement via Online and Social Media*, to develop Training Package Products to meet skills gaps in this area. For further information on this project, please visit the SkillsIQ project webpage: <https://www.skillsiq.com.au/CurrentProjectsandCaseStudies/Consumerengagement>.

➤ **Lack of career progression opportunities and general work conditions**

Career progression is a factor which employees take into account when determining their employment conditions and satisfaction levels. Staff attraction and staff turnover issues are significant in the sector. The casualisation of jobs is a prominent occurrence in the industry and a potential contributor to creating the perception that there is a lack of long-term career pathways, and job security for workers. Casual employment is generally characterised as employment with no entitlement to paid leave. By the end of 2018, casual employees accounted for 22.4% of the Sport and Recreation workforce.²⁵ The level of full-time workers in Sport and Recreation is less than half, and below the industry average (68.4%) with individual occupations showing full-time employment rates as - Outdoor Adventure Guides (39.7%), Sports Coaches, Instructors and Officials (19.6%) and Fitness Instructors (35.8%).²⁶

²³ Yellow (2019) *Yellow Social Media Report 2018. Part Two – Businesses* [Available at: <https://www.yellow.com.au/wp-content/uploads/2018/06/Yellow-Social-Media-Report-2018-Businesses.pdf>] [Accessed 4 April 2019]

²⁴ Social Media News (2019) *Social Media Statistics Australia – January 2019* [Available at: <https://www.socialmedianews.com.au/social-media-statistics-australia-january-2019/>] [Accessed 5 April 2019]

²⁵ ABS (2019) *Characteristics of Employment, Australia, August 2018*. Cat. No. 6333.0. November 2018. Canberra.

²⁶ Department of Jobs and Small Business – Job Outlook (2017) *Various ANZSCO codes* [Accessed 16 April 2019]

The heavy reliance to use volunteers to enable its services can also contribute to the industry's perception of offering 'short-term' employment opportunities. The most recent data (2010) shows the physical recreation sector attracted the largest number of volunteers (2.3 million).²⁷ Sport and recreational organisations also have the highest level of volunteer engagement at 157.5 million hours, compared to religious organisations (147.6 million) and welfare/community (141.1 million).

The Sports and Recreation industry can offer flexible, extensive and accessible employment opportunities, ranging from basic level entry positions to supervisory and management roles. Training Package update projects in the Sport, Outdoor Recreation and Fitness sectors are focusing on strengthening the alignment between the structure and content of qualifications, skill sets and Units of Competency and contemporary job roles.

Other issues impacting the workforce include wages, general work conditions and seasonality of employment (in some areas and for certain sports which are not played across the full year). For example, the latest earnings data published by the Australian Bureau of Statistics (ABS) shows that Sport and Recreation industry workers reported the third lowest average weekly cash earning, \$917.20, where the industry average is \$1,380.28.²⁸

Addressing workforce conditions and building and promoting visible career pathways can support the industry establish a sustainable future workforce and ensure it can meet the growing demand for services.

➤ **Training Package Products**

The Sport and Recreation Training Package is currently being updated to remove repetitive Units of Competency and ensure the structure and content of qualifications align to existing and emerging job roles. Structures to accommodate the professionalism and integrity of the sector are also a significant consideration.

Statements of Attainment and skill sets are valued in the sports, fitness and outdoor recreation sectors as they are a flexible and effective way of addressing requirements of job roles with specialised activity requirements. More recently this flexibility is increasingly required to address the impacts of technology and the diversity of client needs in maintaining and promoting professionalism, currency and ongoing skills development within the sector.

It has also been reported that statements of attainment are a useful pathway for people who are mature age new entrants or working within the sector as volunteers. Within these groups there are many who have not participated in formal education for some time and lack confidence to enrol in full qualifications.

²⁷ Volunteering Australia (2017) *National Sports Plan Australian Sports Commission* [Available at:

²⁸ Australian Bureau of Statistics (ABS) *Average Weekly Earnings, Australia, Nov 2018*. Cat. No. 6302.0. February 2019. Canberra.

Vocational Education and Training (VET) Qualifications Supporting Industry

The nationally recognised VET qualifications that cater to this sector are:

Aquatic and Community Recreation

- SIS31015 Certificate III in Aquatics and Community Recreation

Fitness

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

Outdoor Recreation

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

Sport

- 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

- 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.

Table 2: Number of Registered Training Organisations (RTOs) by nationally recognised Sport and Recreation qualifications on scope – Sport and Recreation Training Package Products

Code	Qualification title	No. of RTOs with qualification on scope
Aquatic and Community Recreation		
SIS31015	Certificate III in Aquatics and Community Recreation	20
Fitness		
SIS30315	Certificate III in Fitness	104
SIS40215	Certificate IV in Fitness	83
SIS50215	Diploma of Fitness	22
Outdoor Recreation		
SIS20213	Certificate II in Outdoor Recreation	61
SIS30413	Certificate III in Outdoor Recreation	40
SIS40313	Certificate IV in Outdoor Recreation	33
SIS50310	Diploma of Outdoor Recreation	13
Sport		
SIS20412	Certificate II in Sport Career Oriented Participation	8
SIS20513	Certificate II in Sport Coaching	36
SIS30613	Certificate III in Sport Career Oriented Participation	11
SIS30713	Certificate III in Sport Coaching	18
SIS30813	Certificate III in Sports Trainer	9
SIS30913	Certificate III in Sport Officiating	0
SIS40512	Certificate IV in Sport Coaching	9
SIS40612	Certificate IV in Sport Development	11
SIS50512	Diploma of Sport Coaching	7

Code	Qualification title	No. of RTOs with qualification on scope
SIS50612	Diploma of Sport Development	34
Sport and Recreation		
SIS10115	Certificate I in Sport and Recreation	28
SIS20115	Certificate II in Sport and Recreation	75
SIS30115	Certificate III in Sport and Recreation	64
SIS40115	Certificate IV in Sport and Recreation	11
SIS50115	Diploma of Sport and Recreation Management	17

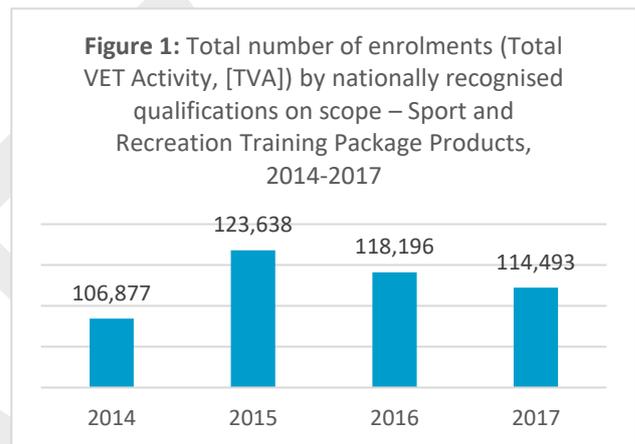
Source: Training.gov.au. RTOs approved to deliver this qualification. Accessed 27 February 2019.

Enrolments and Completions

In 2017, there were over **114,000 enrolments** across all VET qualifications catered for by the Sport and Recreation Training Package Products. This represents a decrease of 3% (equivalent to 3,703 enrolments) from the previous year (see **Figure 1**).

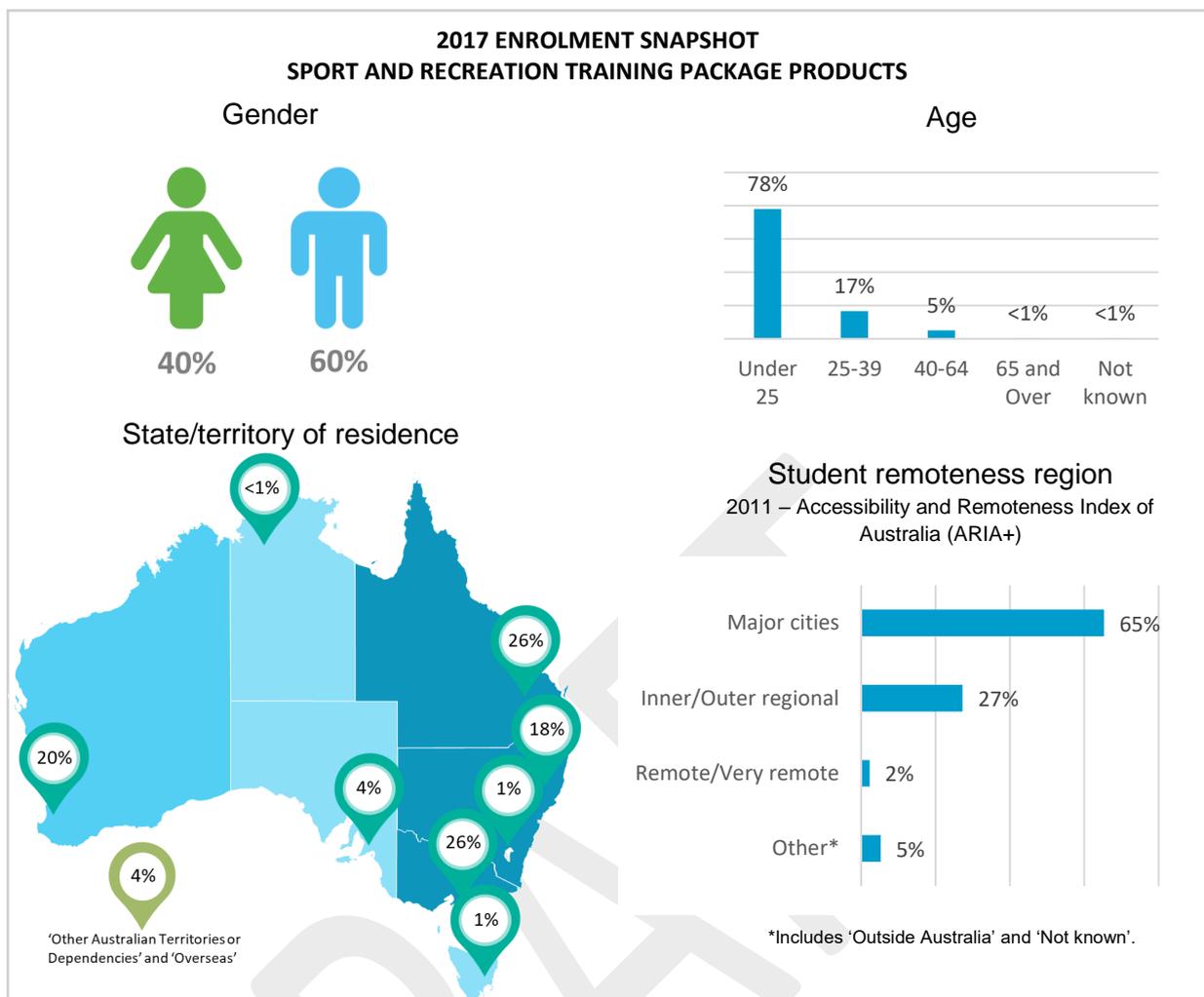
The most popular qualifications in 2017 were:

- SIS30315 - Certificate III in Fitness (25,494 enrolments)
- SIS30115 - Certificate III in Sport and Recreation (16,687 enrolments).



Source: NCVET VOCSTATS, Program enrolments 2014-2017

A snapshot of key traits of the *SIS Training Package - Sport and Recreation* enrolments for 2017 is provided below, followed by a breakdown of enrolments and completions for individual qualifications (see **Table 3** and **Table 4**).



Source: NCVER VOCSTATS (Program enrolments 2017 by various breakdowns)

General notes on statistics:

1. Enrolment data is sourced from NCVER VOCSTATS (program enrolments 2014–2017), accessed August 2018.
2. It is important to note that not all training providers were required to submit enrolment and completion data at the time of collection, and some figures presented may therefore under-represent the true count of enrolments and completions for a qualification. From 2018, **all** training providers are required to submit data, and current discrepancies noted in the national NCVER figures versus actual attendance should therefore 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. Completion data for 2017 represents preliminary outcomes (i.e. not a full year).
5. For a more complete indication, superseded qualifications from the 2012 training package (and their respective enrolment and completion data) are included.
6. *Qualifications in italics* represent superseded qualifications.

Table 3: Total number of enrolments (Total VET Activity, [TVA]) by nationally recognised qualifications on scope – Sport and Recreation Training Package Products, 2014-2017

Qualification	2014	2015	2016	2017	Total
Aquatic and Community Recreation					
SIS31015 - Certificate III in Aquatics and Community Recreation	0	0	423	631	1,054
SIS30113 - Certificate III in Aquatics	8,290	5,792	5,047	2,305	21,434
SIS30110 - Certificate III in Aquatics	14,028	11,674	4,582	4,025	34,309
SIS30213 - Certificate III in Community Activity Programs	45	1,364	987	11	2,407
SIS30210 - Certificate III in Community Activity Programs	1,235	109	0	0	1,344
Fitness					
SIS30315 - Certificate III in Fitness	0	3	8,883	25,494	34,380
SIS30310 - Certificate III in Fitness	20,831	2,344	672	568	24,415
SIS30313 - Certificate III in Fitness	11,824	31,447	20,676	4,082	68,029
SIS40215 - Certificate IV in Fitness	0	2	2,711	13,592	16,305
SIS40210 - Certificate IV in Fitness	22,411	20,340	15,583	5,013	63,347
SIS50215 - Diploma of Fitness	0	0	41	51	92
SIS50213 - Diploma of Fitness	436	1,454	1,274	234	3,398
SIS50210 - Diploma of Fitness	1,001	86	26	12	1,125
Outdoor Recreation					
SIS20213 - Certificate II in Outdoor Recreation	2,495	7,125	7,875	7,199	24,694
SIS30413 - Certificate III in Outdoor Recreation	507	1,198	1,672	1,487	4,864
SIS40313 - Certificate IV in Outdoor Recreation	112	946	789	803	2,650
SIS50310 - Diploma of Outdoor Recreation	151	143	140	144	578
Sport					
SIS20412 - Certificate II in Sport Career Oriented Participation	317	198	569	575	1,659
SIS20513 - Certificate II in Sport Coaching	3,463	6,440	7,375	8,049	25,327
SIS30613 - Certificate III in Sport Career Oriented Participation	93	200	259	263	815
SIS30713 - Certificate III in Sport Coaching	446	834	615	330	2,225
SIS30813 - Certificate III in Sports Trainer	67	162	229	2	460
SIS40512 - Certificate IV in Sport Coaching	320	528	378	379	1,605
SIS40612 - Certificate IV in Sport Development	293	323	268	214	1,098
SIS50512 - Diploma of Sport Coaching	213	325	293	245	1,076
SIS50612 - Diploma of Sport Development	1,619	2,543	2,181	1,837	8,180
Sport and Recreation					
SIS10115 - Certificate I in Sport and Recreation	0	0	608	1,277	1,885
SIS10113 - Certificate I in Sport and Recreation	840	1,864	962	66	3,732
SIS20115 - Certificate II in Sport and Recreation	0	0	2,127	15,013	17,140
SIS20113 - Certificate II in Community Activities	422	832	671	232	2,157
SIS20313 - Certificate II in Sport and Recreation	5,121	10,669	12,791	1,530	30,111
SIS30115 - Certificate III in Sport and Recreation	0	0	487	16,687	17,174
SIS30513 - Certificate III in Sport and Recreation	10,297	14,693	16,817	1,405	43,212
SIS40115 - Certificate IV in Sport and Recreation	0	0	151	221	372

Qualification	2014	2015	2016	2017	Total
SIS50115 - Diploma of Sport and Recreation Management	0	0	34	517	551

Source: NCVER VOCSTATS, accessed August 2018.

Note: SIS30913 Certificate III in Sport Officiating was not listed in the NCVER data at time of reporting.

Table 4: Total number of completions (Total VET Activity, [TVA]) by nationally recognised qualifications on scope – Sport and Recreation Training Package Products, 2014-2017

Qualification	2014	2015	2016	2017	Total
Aquatic and Community Recreation					
SIS31015 - Certificate III in Aquatics and Community Recreation	0	0	8	82	90
SIS30113 - Certificate III in Aquatics	52	226	23	7	308
SIS30110 - Certificate III in Aquatics	86	108	0	0	194
SIS30213 - Certificate III in Community Activity Programs	0	521	433	9	963
SIS30210 - Certificate III in Community Activity Programs	110	30	0	0	140
Fitness					
SIS30315 - Certificate III in Fitness	0	0	1,728	7,554	9,282
SIS30310 - Certificate III in Fitness	9,550	843	76	11	10,480
SIS30313 - Certificate III in Fitness	2,362	12,301	9,602	1,388	25,653
SIS40215 - Certificate IV in Fitness	7	0	683	3,830	4,520
SIS40210 - Certificate IV in Fitness	9,249	8,723	6,039	2,277	26,288
SIS50215 - Diploma of Fitness	0	0	22	15	37
SIS50213 - Diploma of Fitness	98	520	690	195	1,503
SIS50210 - Diploma of Fitness	356	47	4	8	415
Outdoor Recreation					
SIS20213 - Certificate II in Outdoor Recreation	638	2,160	2,732	2,960	8,490
SIS30413 - Certificate III in Outdoor Recreation	68	123	263	355	809
SIS40313 - Certificate IV in Outdoor Recreation	47	140	178	231	596
SIS50310 - Diploma of Outdoor Recreation	67	40	71	40	218
Sport					
SIS20412 - Certificate II in Sport Career Oriented Participation	84	77	135	3	299
SIS20513 - Certificate II in Sport Coaching	692	1,530	1,846	2,138	6,206
SIS30613 - Certificate III in Sport Career Oriented Participation	68	161	164	210	603
SIS30713 - Certificate III in Sport Coaching	94	281	270	144	789
SIS30813 - Certificate III in Sports Trainer	32	24	27	0	83
SIS40512 - Certificate IV in Sport Coaching	83	247	71	65	466
SIS40612 - Certificate IV in Sport Development	156	170	154	104	584
SIS50512 - Diploma of Sport Coaching	89	107	82	68	346
SIS50612 - Diploma of Sport Development	824	1,069	870	793	3,556
Sport and Recreation					
SIS10115 - Certificate I in Sport and Recreation	0	0	117	556	673
SIS10113 - Certificate I in Sport and Recreation	328	757	579	15	1,679
SIS20115 - Certificate II in Sport and Recreation	0	0	330	5,953	6,283

Qualification	2014	2015	2016	2017	Total
<i>SIS20113 - Certificate II in Community Activities</i>	58	355	327	155	895
<i>SIS20313 - Certificate II in Sport and Recreation</i>	1,574	4,750	5,897	632	12,853
<i>SIS30115 - Certificate III in Sport and Recreation</i>	0	0	18	2,875	2,893
<i>SIS30513 - Certificate III in Sport and Recreation</i>	984	3,885	4,497	180	9,546
<i>SIS40115 - Certificate IV in Sport and Recreation</i>	0	0	148	133	281
<i>SIS50115 - Diploma of Sport and Recreation Management</i>	0	0	3	121	124

Source: NCVER VOCSTATS, accessed August 2018.

Note: *SIS30913 Certificate III in Sport Officiating* was not listed in the NCVER data at time of reporting.

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A.2 Employment and Skills Outlook Overview

Employment – Current and Projected

Note: The principal data source that provides workforce data and trends regarding roles of relevance to this Training Package at a national level is Census data collected by the Australian Bureau of Statistics (ABS) and the Department of Jobs and Small Business. The workforce statistics and projections presented in this section are based on Census collections and are reported according to prescribed Australian and New Zealand Standard Industrial Classification (ANZSIC) and Australian and New Zealand Standard Classification of Occupations classifications (ANZSCO).

The current definitions, and the labelling used for some ANZSIC and ANZSCO codes, as well as the aggregation of roles across codes, can be limited in providing a true picture of some sectors' workforce. Sectors can host a multitude of job functions, and consequently comprise of job titles which go beyond the categories listed in ANZSCO. The statistics in this section are provided as an indicative overview of the sector only

Job roles covered by the Sport and Recreation Training Package Products are captured across the following ANZSCO categories:

- ANZSCO 4522 **Outdoor Adventure Guides** – representing in aggregate Bungy Jump Master, Fishing Guide, Hunting Guide, Mountain or Glacier Guide, Outdoor Adventure Instructor, Trekking or Bushwalking Guide, Whitewater Rafting Guide and Other Outdoor Adventure Guides.
- ANZSCO 4523 **Sports Coaches, Instructors and Officials** – representing in aggregate Diving Instructor (Open Water), Gymnastic Coach or Instructor, Horse Riding Coach or Instructor, Snowsport Instructor, Swimming Coach or Instructor, Tennis Coach, Other Sports Coach or Instructor, Dog or Horse Racing Official, Sports Development Officer, Sports Umpire or Referee and Other Sports Official.
- ANZSCO 4521 **Fitness Instructors**

In 2018, there were **39,700** Sports Coaches, Instructors and Officials, **31,400** Fitness Instructors and **4,500** Outdoor Adventure Guides employed across Australia (see **Figure 2**).

These job roles are examples of where the ANZSCO categories are limited and do highlight where further research is required to establish specific details. Previous sections of this Industry Forecast contain examples of alternative data sources.



Source: Department of Jobs and Small Business - Job Outlook, various ANZSCO codes, accessed 28 February 2019

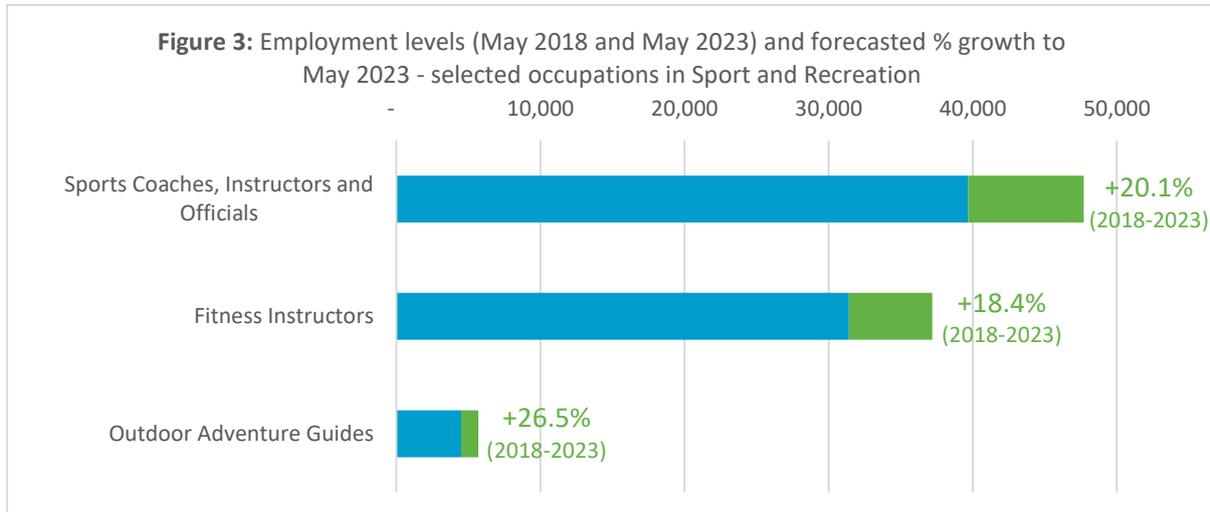
Generally, Sports Coaches, Instructors and Officials, Fitness Instructors and Outdoor Adventure Guides tend to be younger than the national average age of the workforce (see Table 5). There is also a greater representation of women as Sports Coaches, Instructors and Officials and Fitness Instructors, when compared to the national average.

Table 5: Workforce traits of selected occupations in Sport and Recreation (2017)

Traits	Sports Coaches, Instructors and Officials	Fitness Instructors	Outdoor Adventure Guides
Average age	22 years (national average 40 years)	35 years (national average 40 years)	31 years (national average 40 years)
Gender – female	51% (national average 46.7%)	61.2% (national average 46.7%)	36.4% (national average 46.7%)
Full-time	19.6% (national average 68.4%)	35.8% (national average 68.4%)	39.7% (national average 68.4%)
Location	NSW – 24.2% VIC – 29.8% QLD – 19.3% SA – 5.7% WA – 15.5% TAS – 1.8% NT – 0.6% ACT – 3.1%	NSW – 24.5% VIC – 29.0% QLD – 25.0% SA – 6.0% WA – 12.4% TAS – 1.6% NT – 0.6% ACT – 0.9%	NSW – 38.7% VIC – 27.2% QLD – 10.0% SA – 9.3% WA – 8.9% TAS – 4.2% NT – 1.7% ACT – 0.0%

Source: Department of Jobs and Small Business - Job Outlook, various ANZSCO, accessed 20 February 2019

Over the next five years, Sports Coaches, Instructors and Officials, Fitness Instructors and Outdoor Adventure Guides are forecasted to experience very strong growth (see **Figure 3**). Outdoor Adventure Guides are expected to experience the highest rate of growth, increasing by 26.5% through to 2023, followed by Sports Coaches, Instructors and Officials (20.1%) and Fitness Instructors (18.4%).



Source: Department of Jobs and Small Business - 2018 Occupational Projections – five years to May 2023, accessed November 2018

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Future Skills

Note: The findings are based on desk research as well as SkillsIQ's 2019 Future Skills Survey (conducted between November 2018 and January 2019) which has been filtered to include stakeholders from the Sports and Recreation industry only. Insights and advice from IRC members has also been used to compile and validate the information provided.

The work environment across all industries is continuously evolving to adapt to external and internal industry trends. Technology, automation, Artificial Intelligence (AI), globalisation, an ageing population, shifts in workforce demographics and industry (i.e. transition from manufacturing and production to a largely service-based economy)²⁹ are just some of the ongoing trends driving change.

The Sport and Recreation sectors like others, has been impacted by these trends and as a result, so too have the skills needs of the workforce. Whilst technical skills to perform job tasks is imperative, employers in the short-to-medium future will be looking beyond this and have indicated that it will be important for workers in their organisation to be **equipped with key soft skills**:



Technical /
job-specific
skills



Self-management



Teamwork and
communication



Problem solving

These results are in line with wider studies, including the World Economic Forum and its *Future of Jobs Survey 2018* which indicates that the top 10 demand for skills in 2022 will include **analytical thinking** and **innovation, creativity, originality** and **initiative, critical thinking, complex problem-solving, leadership** and **emotional intelligence**.³⁰

The VET system plays a pivotal role in supporting employers and employees adapt to technologies and changes in the workplace. Its role in skilling the workforce with current and emerging skills needs will only grow more strongly in the future as it continues to support individuals to enter the workplace or transition into different roles.³¹

²⁹ Payton, A, Knight, G, 2018, *Skills for a global future*, NCVER, Adelaide. [Available at https://www.ncver.edu.au/data/assets/pdf_file/0041/3179885/Skills-for-a-global-future.pdf]

³⁰ World Economic Forum (2018) *The Future of Jobs Report 2018*, Centre for the New Economy Society, Switzerland [Available at: http://www3.weforum.org/docs/WEF_Future_of_Jobs_2018.pdf]

³¹ Innovation and Science Australia 2017, *Australia 2030: prosperity through innovation*, Australian Government, Canberra.

Key Generic Skills – Ranked in Order of Importance

The 12 generic skills listed below, including the descriptors, were provided by the Department of Education and Training for the purpose of being ranked by industry representatives. For the 2019 ranking exercise, an 'Other' generic skill option was included in the list to capture any additional key skills considered important for an industry. Please note that, in this case, no other generic skills were identified.

- 1 **Customer service / Marketing** - Ability to interact with another human being, whether helping them find, choose or buy something. Ability to supply customers' wants and needs both via face to face interactions or digital technology. Ability to manage online sales and marketing. Ability to understand and manage digital products.
- 2 **Communication / Collaboration including virtual collaboration/ Social intelligence** - Ability to understand and apply the principles of creating more value for customers with fewer resources (lean manufacturing) and collaborative skills. Ability to critically assess and develop content that uses new media forms and leverage these media for persuasive communications. Ability to connect to others in a deep and direct way, to sense and stimulate reactions and desired interactions.
- 3 **Learning agility / Information literacy / Intellectual autonomy and self-management** - Ability to identify a need for information. Ability to identify, locate, evaluate, and effectively use and cite the information. Ability to discriminate and filter information for importance. Ability to do more with less. Ability to quickly develop a working knowledge of new systems to fulfil the expectations of a job.
- 4 **Design mindset / Thinking critically / System thinking / Solving problems** - 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.
- 5 **Managerial / Leadership** - Ability to effectively communicate with all functional areas in the organisation. Ability to represent and develop tasks and work processes for desired outcomes. Ability to oversee processes, guide initiatives and steer employees toward achievement of goals.
- 6 **Technology use and application skills** - Ability to create and/or use of technical means, understand their interrelation with life, society, and the environment. Ability to understand and apply a scientific or industrial processes, inventions, methods etc. Ability to deal with increasing mechanisation and automation and computerisation. Ability to do work from mobile devices rather than from paper.
- 7 **Language, Literacy and Numeracy (LLN)** - Foundation skills of literacy and numeracy.
- 8 **Entrepreneurial** - Ability to take any idea, whether it be a product and/or service, and turn that concept into reality and not only bring it to market, but make it a viable product and/or service. Ability to focus on the very next step to get closer to the ultimate goal.
- 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 and 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 skills** - 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: facts, figures, number crunching, analysing results.
- 12 **Science, Technology, Engineering and Maths (STEM)** - Sciences, mathematics and scientific literacy.

A.3 Key Drivers for Change and Proposed Responses Overview

Key Drivers

There is no Training Package development work proposed for 2019-2020, as consultation with the IRC and broader industry did not identify any significant skills gaps which require action in the current year.

Updates Completed in 2019

Training Package Products relating to the Sport and Outdoor Recreation sectors have recently undergone an extensive update to address the requirements of the current standards for Training Packages and strengthen the alignment to contemporary job roles and industry requirements. The endorsement of the updated Training Package Products is scheduled for the August 2019 meeting of the AISC.

These updates include significant changes in the qualification structures to align to job roles.

Current Work in Progress

Projects approved in the *2018 Sport and Recreation IRC Industry Skills Forecast* for 2018 – 2019 include updates to Training Package Products relating to job roles in the Fitness Sector and the role of the Aquatic Instructor.

The following qualifications and any associated skills sets and Units of Competency are included in the current projects:

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

The skill set for the role of an Aqua Instructor including the content of the following units is being specifically considered:

- SISCAQU002 – Perform basic water rescues
- SISCAQU008 – Instruct water familiarisation, buoyancy and mobility skills.

A.4 Consultation Undertaken

A widespread **multi-channel consultation** involving the following stakeholders has been conducted to identify and substantiate the key skills gaps and training needs of the sector, and to determine whether or not there is a need to update the respective Training Package Products:

- All Sport and Recreation Industry Reference Committee (IRC) members representing the following key bodies:
 - Above and Below Adventure Company
 - The Outdoor Education Group
 - Qld Fitness, Sport and Recreation Skills Australia
 - The Scout Association of Australia
 - Recreation SA
 - Royal Life Saving Society Australia
 - Community Sport Australia Ltd
 - Sport Australia
 - Australian Services Union
 - Australian Workers Union
- Networks of the Sport and Recreation IRC members
- A national online survey distributed via the SkillsIQ database between November 2018 and January 2019 that sought to identify top skills needs and priority industry issues
- Public consultation on the draft Industry Skills Forecast to be publicised to over 17,000 stakeholders registered in SkillsIQ's database network
- The Industry Skills Forecast, to be promoted to stakeholders and made available via SkillsIQ's website.

A full list of stakeholders is supplied at **Appendix A**.

B. Proposed Schedule of Work

2020-21

Year	Project Title and Descriptor
2020-21	<i>No new projects proposed</i>

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Appendix A Stakeholder Consultation to date

Name	Organisation	Jurisdiction
Sport and Recreation IRC member		
John Norman	Above and Below Adventure Company	NSW
Richard Thornton	The Outdoor Education Group	VIC
Jo Chiu	QLD Fitness, Sport and Recreation Skills Alliance	QLD
Chris Alexander	Fitness Australia	VIC
Jeffrey Lehrer	The Scout Association of Australia	NSW
Lee Maglica	Recreation SA	SA
Craig Roberts	Royal Life Saving Society Australia	NSW
Leah Cassidy	Community Sport Australia	SA
Dana Assenheim	Australian Sports Commission	ACT
Michael O'Connor	Australian Workers Union	ACT
Robert Potter	Australian Services Union	NSW