

2018

Sport and Recreation

INDUSTRY REFERENCE COMMITTEE
INDUSTRY SKILLS FORECAST



SKILLSIQ

CAPABLE PEOPLE MAKE CLEVER BUSINESS

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Skills Forecast

Name of IRC:

Sport and Recreation

Name of SSO:

SkillsIQ Limited

About SkillsIQ:

SkillsIQ supports 18 Industry Reference Committees (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% of the Australian workforce.

Our qualifications deliver skilled people that are valued and make a difference to others.

- Cross Sector Skills Committee, February 2018



Executive Summary

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

The Sport and Recreation Industry Reference Committee (IRC) is responsible for ensuring nationally recognised Sport, Fitness and Recreation qualifications deliver the skills and knowledge required to equip its sectors with a highly skilled workforce, both now and into the future. IRC membership comprises industry associations, peak bodies, employee associations, government agencies and departments, and employers.

The Sport and Recreation IRC has responsibility for twenty-three qualifications aligned to job roles within the following sectors:

- Sport
- Fitness
- Aquatic and Community Recreation, and
- Outdoor Recreation.

Training package products are currently spread across two training packages. Those related to the Sport and Outdoor Recreation sectors are currently contained in the Training Package **SIS10** and are undergoing a significant update. This has been in part due to the requirement to bring them in line with the *Standards for Training Packages 2012*, as well as ensuring that these qualifications are adjusted to meet changing industry needs and provide current and relevant skills. The consultation process which helped inform these updates has also informed aspects of this 2018 Industry Skills Forecast.

Other training package products were updated in 2015 and are housed in the **SIS** Training Package. In some areas the impact of changes has now been considered by industry, and explicit preferences supported by research and, in some cases, data have been expressed in respect to scheduling work in the 2018–2019 period.

In addition to the sector-specific and targeted consultations, SkillsIQ met with the Sport and Recreation IRC over the December 2017 to March 2018 period to draft, review and finalise the content of the 2018 Industry Skills Forecast.

The IRC members represent a cross-section of interests in respect to the training package products and reached out to their stakeholder networks to assess, challenge or clarify the information that had been gathered. Draft material was made available to over 17,000 stakeholders via an online feedback mechanism during March 2018. An online survey conducted in November to December 2017 was also made available to all stakeholders. Desktop research and analysis was conducted to uncover existing research and views on skill requirements in the sectors. Throughout the process, the IRC was consulted to confirm that the information was valid, and that it appropriately reflected industry views.

The sector analysis and industry consultation indicate that the overall industry is, and will continue to be, diverse in terms of business and organisation types, and that much more data is available for some sub-sectors than for others.

The sectors are collectively impacted by a number of challenges and opportunities, including:

- Size, range and fragmentation
- The integration of activity with the health and wellness sectors
- Growth in nature-based outdoor activity
- The facilitation of physical activity for children
- Cost of participation
- Lack of consistency in definitions and data
- Access to facilities
- Governance and ethics
- Social media and technology
- Attraction and retention of staff
- A reliance on volunteers
- An increasing professionalism of the sectors.

Current and proposed training package development work will look to address these issues.

The IRC is proposing to update three qualifications that cater to the Fitness sector, as well as to develop a new skill set relating to Aquatic Instructor training to meet the demands of industry growth and increase credibility through improved standards of professionalism, customer care and service.





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 sub-sectors.

While the public profile of the sector 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 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 it's variety of 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 as Australia's largest volunteer destination.¹

The occupations within the sector that this Industry Reference Committee (IRC) represents include:

- Outdoor activity guides and instructors
- Youth workers
- Outdoor recreation managers
- Camp managers
- Fitness instructors
- Group instructors
- Gym floor instructors
- Personal trainers
- Lifeguards
- Pool lifeguards

- Gym centre managers
- Sports coaches and instructors
- Sports officials
- Sports trainers
- Team managers
- Sport event managers
- Sport development officers and managers.

Community recreation job roles include:

- Customer services officers
- Administration officers
- Aquatic technical operators
- Duty managers
- Aquatic facility managers
- Aquatic instructors
- Swimming and water safety teachers
- Community recreation activity assistants
- Community activities officers
- Recreation officers and leaders
- Facility managers
- Pool operators
- Sport and recreation event managers
- Development officers.

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

Nationally Recognised Sport and Recreation Qualifications – Current as at June 2018

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 Organisations (RTOs) with Sports and Recreation qualifications on scope. This data is current as at June 2018, per the listing on the National Register of VET (www.training.gov.au).

Table 1 Number of RTOs by nationally recognised qualifications on scope – Sports and Recreation Training Package Products

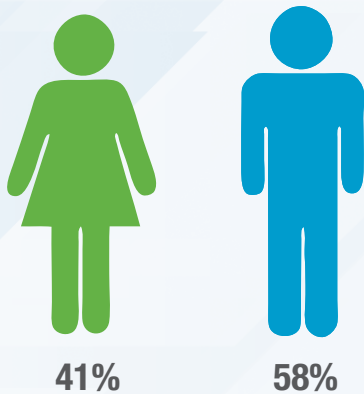
Qualification Code	Qualification Title	No. of RTOs with Qualification on Scope
SIS30315	Certificate III in Fitness	113
SIS40215	Certificate IV in Fitness	89
SIS50215	Diploma of Fitness	29
SIS31015	Certificate III in Aquatics and Community Recreation	20
SIS20213	Certificate II in Outdoor Recreation	63
SIS30413	Certificate III in Outdoor Recreation	49
SIS40313	Certificate IV in Outdoor Recreation	39
SIS50310	Diploma of Outdoor Recreation	15
SIS20412	Certificate II in Sport Career Oriented Participation	6
SIS20513	Certificate II in Sport Coaching	40
SIS30613	Certificate III in Sport Career Oriented Participation	11
SIS30713	Certificate III in Sport Coaching	21
SIS30813	Certificate III in Sports Trainer	12
SIS30913	Certificate III in Sport Officiating	0
SIS40512	Certificate IV in Sport Coaching	10
SIS40612	Certificate IV in Sport Development	12
SIS50512	Diploma of Sport Coaching	7
SIS50612	Diploma of Sport Development	44
SIS10115	Certificate I in Sport and Recreation	32
SIS20115	Certificate II in Sport and Recreation	80
SIS30115	Certificate III in Sport and Recreation	65
SIS40115	Certificate IV in Sport and Recreation	11
SIS50115	Diploma of Sport and Recreation Management	20

Source: Training.gov.au. RTOs approved to deliver this qualification. Accessed 21 June 2018.

2016 ENROLMENT SNAPSHOT

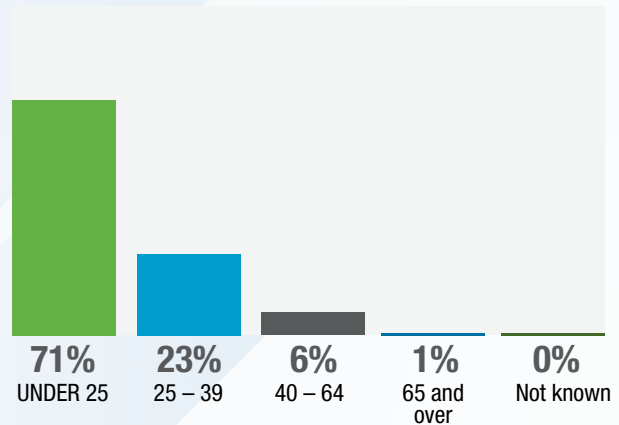
SPORTS AND RECREATION TRAINING PACKAGE PRODUCTS

GENDER

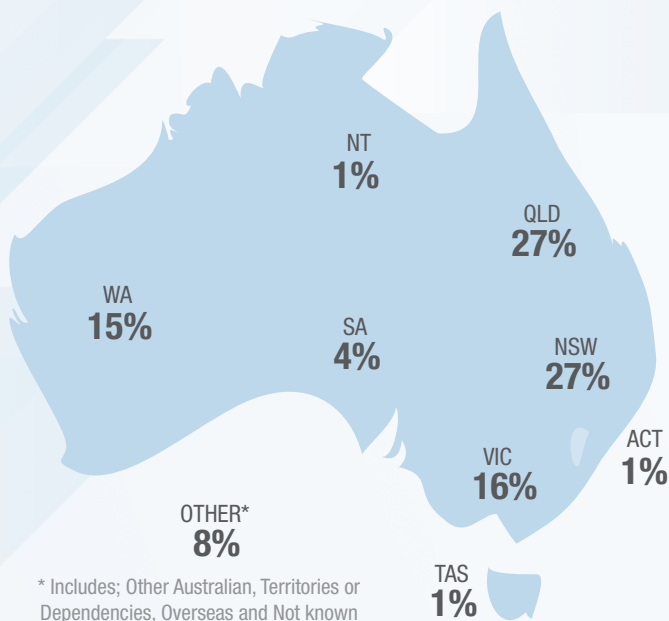


AGE

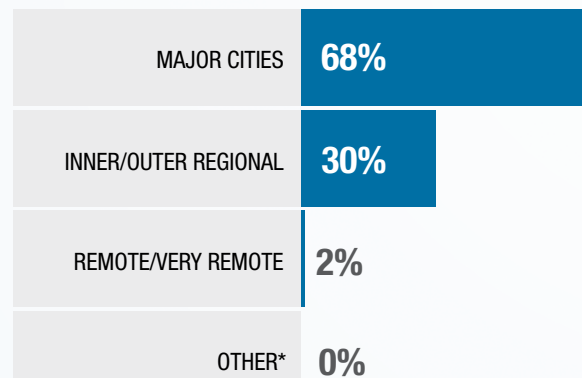
Percentage Years of age



STATE/TERRITORY OF RESIDENCE



STUDENT REMOTENESS REGION (2011 ARIA+)



* Includes; Outside Australia and Not known

Source: NCVER VOCSTATS (Program enrolments 2016 by various breakdowns)

Base count n = 59,464

Note: Please refer to the previous section for a list of qualifications that are included in the enrolment summary. Due to the way enrolment data is currently registered, some superseded units are included in the total enrolment count to provide a more representative picture of volume. The superseded units include:

SIS30310 – Certificate III in Fitness

SIS30313 – Certificate III in Fitness



General notes on statistics

1. Enrolment data is sourced from NCVET VOCSTATS (program enrolments 2014–2016), accessed November 2017.
2. It is important to note that not all training providers are currently required to submit enrolment and completion data. Some figures presented may therefore under-represent the true count of enrolments and completions for a qualification. From 2018, all training providers will be required to submit data, and current discrepancies noted in the national NCVET 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. For a more complete indication, superseded qualifications from the 2012 training package (and their respective enrolment data) are included in Table 2 because enrolments in qualifications updated in 2016 would not be captured during the data collection period.
5. Qualifications in *italics* represent superseded qualifications.



A lifeguard wearing a yellow and red cap and a yellow long-sleeved shirt with "SURF RESCUE" printed on the back in red letters. The lifeguard is standing on a beach, looking out at the ocean with waves breaking. The sky is blue with some clouds and a few kitesurfers are visible in the distance.

All Student Programs – Enrolments and Completions

Table 2 Total number of enrolments (Total VET Activity, [TVA]) by nationally recognised qualifications on scope – Sport and Recreation Training Package Products, 2014–2016

QUALIFICATION	2014	2015	2016	TOTAL
SIS30315 Certificate III in Fitness	0	7	8,885	8,892
SIS30310 Certificate III in Fitness	20,831	2,346	666	23,843
SIS30313 Certificate III in Fitness	11,819	31,443	20,679	63,941
SIS40215 Certificate IV in Fitness	0	3	2,711	2714
SIS40210 Certificate IV in Fitness	22,411	20,340	15,582	58,333
SIS50215 Diploma of Fitness	0	0	41	41
SIS50213 Diploma of Fitness	439	1,452	1,280	3,171
SIS50210 Diploma of Fitness	997	85	23	1105
SIS31015 Certificate III in Aquatics and Community Recreation	0	0	423	423
SIS30113 Certificate III in Aquatics	8,292	5,800	5,044	19,136
SIS30110 Certificate III in Aquatics	14,024	11,675	4,582	30,281
SIS30213 Certificate III in Community Activity Programs	45	1,366	990	2,401
SIS30210 Certificate III in Community Activity Programs	1,236	103	1	1,340
SIS20213 Certificate II in Outdoor Recreation	2,497	7124	7,874	17,495
SIS30413 Certificate III in Outdoor Recreation	505	1,194	1,674	3,373
SIS40313 Certificate IV in Outdoor Recreation	111	951	785	1,847
SIS50310 Diploma of Outdoor Recreation	156	139	140	435
SIS20412 Certificate II in Sport Career Oriented Participation	318	195	567	1,080
SIS20513 Certificate II in Sport Coaching	3,464	6,440	7,374	17,278
SIS30613 Certificate III in Sport Career Oriented Participation	93	200	265	558
SIS30713 Certificate III in Sport Coaching	442	831	619	1,892
SIS30813 Certificate III in Sports Trainer	65	162	228	455
SIS30913 Certificate III in Sport Officiating	0	0	0	0
SIS40512 Certificate IV in Sport Coaching	319	530	378	1,227
SIS40612 Certificate IV in Sport Development	294	318	268	880
SIS50512 Diploma of Sport Coaching	213	330	297	840
SIS50612 Diploma of Sport Development	1,616	2,546	2,183	6,345
SIS10115 Certificate I in Sport and Recreation	0	0	608	608
SIS20115 Certificate II in Sport and Recreation	0	0	2,127	2,127
SIS30115 Certificate III in Sport and Recreation	0	0	484	484
SIS40115 Certificate IV in Sport and Recreation	0	0	151	151
SIS50115 Diploma of Sport and Recreation Management	0	0	35	35

Source: NCVET VOCSTATS, accessed November 2017.



Stakeholders

National Peak Bodies and Key Industry Organisations

The following 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. Engagement and consultation activities will include a broad range of industry stakeholders beyond those included in this list.

- **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
 - Australian Council for Health, Physical Education and Recreation (ACHPER)
 - School Sport 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**
 - Industry Skills Advisory Council, NT
 - Future Now
 - Queensland Fitness Sport Recreation Skills Alliance
 - SkillsIQ NSW ITAB
 - Service Skills Victoria

Sector Outlook

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 (ASC) 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's 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 the following:

- Sport is being increasingly marginalised in schools, with fewer 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. Two-thirds of adults and one-quarter of children are overweight or obese.⁵
- 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 *Intergenerational Review of Australian Sport 2017* include encouraging more people to increase their participation in sport through modernising sports' offerings; embedding sport within the school day; 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 sports infrastructure, especially at the community level.

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 from 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 share.⁷ 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 have taken market share away from traditional full-service gyms.⁹ 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 have their place, the appeal of personal service cannot be counted out.¹⁰

The range of products and services that are provided in the gym and fitness sector is increasing. Gyms are looking to change the way in which they operate in order to accommodate a more personalised service. There are increasing numbers of types of products including CrossFit, F45, Zumba, Les Mills, HIIT, Pilates and yoga, to name a few, that give consumers 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 an 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 who 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 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 from 2016–17, to \$457.3 million.¹¹

Aquatic and Community Recreation

There are over 1,300 public swimming pools across Australia and approximately the same number 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 management models ranging from local government, state government, non-government organisations and private businesses 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 in which they can familiarise themselves with water activities, 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 greatest amount of economic benefit within this sub-sector in terms of value to the community and the health care 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 year.¹²

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. It is also noted that outdoor learning may occur in the absence of formal outdoor recreation education, through experiences rather than adherence to curriculum.

The size and scale of the outdoor recreation sector is often underestimated as very little 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 economies, supporting 152,000 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, an estimated 10.3 million domestic travellers participated in a form of bush/rainforest walk in the period 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 period.¹⁴



Challenges and Opportunities

Integration of Sport, Fitness and Recreation Activity with the Health and Wellness Sectors

The demand for services for specific demographic groups such as older people, youth and people with health issues has led to an increased range of activity choices in gyms and fitness facilities. In addition to this more people are seeking health and lifestyle activities such as yoga, mindfulness, boxing and various combinations in customised plans. This 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 (Organisation for Economic Co-operation and Development) countries.¹⁶ Physical literacy levels are declining, with the result that more people are not developing skills necessary to live healthy, active lives and participate in sports.

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 New South Wales and Victoria is \$745 million in avoided lifetime health care costs.⁶ The Marsden Jacob report highlights the fact that, in both Victoria and New South Wales, these estimates fail to capture the bulk of the undertakings associated with nature-based outdoor recreation, thereby under-representing its 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 been scientifically proven to lead to greater improvements in psychological wellbeing

than physical activity alone. Green exercise can improve mood, self-esteem, lower levels of mortality, improve immune function and improve chronic illness and connectedness to nature.^{17, 18}

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.

Nature-based tourism has experienced consistent growth in Australia over the last five years. Domestic visitation to nature-based experiences saw 15% growth in 2016 and an astronomical 62% growth over the past five years. International visitations rose by 12% in 2016 and 49% in the last five years.¹⁹ This is supported by anecdotal reports that tourism operators are reporting growth in business sales and also growth in the number of providers offering led outdoor activities.

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 fundamental movement skills (FMS). Children are also not adequately developing across the early foundation stages (early childhood years) before being introduced to community sports.²⁰

Research has shown that the premature teaching of sport skills before children have mastered FMS can negatively impact a child's confidence and performance ability. It can also compromise the child's desire to participate in sports and physical activity in the future.²¹ The ASC 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 encouraging children to participate 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 roles, 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 sub-sectors in the sport, fitness and recreation industry.

Royal Life Saving Society Australia research which has followed on from the National Swimming and Water Safety Education Symposium held in April 2017 has highlighted the need to strengthen school, vacation and water safety programs in the community. Data suggests that children are starting and exiting swimming lessons at a young age and may leave programs prior to reaching National Benchmarks for swimming and water safety.²² Based on the increasing evidence of the lack of water safety knowledge and increasing awareness of national benchmark standards there will be an ongoing demand for qualified swimming and water safety teachers.

Unstructured play in outdoor environments is also important in the development of good health and wellbeing, 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 children.²³

Nature Play is a health and fitness initiative to inspire children's outdoor play.²⁴ The program was founded in Western Australia and is currently being conducted in Queensland, South Australia and the ACT with the support of the respective state governments. The program targets families and children from birth to 12 years of age and encourages participation in active outdoor play and activities.²⁵

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'.²⁶ 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 that direct exposure to the natural environment in early/ pre-school years provides positive impacts of physical, cognitive and emotional development. Playing outdoors can therefore 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.

Cost of Participating in Sport, Fitness and Recreation Activities

There has been increased interest internationally for community models to promote a shift from a singular focus on sport to a broader focus on sport, physical activity and/or active recreation in a community context. The size of Australia and its geographic breadth create challenges for the implementation of national strategies at community levels. It is, however, useful to look at the experience of others in implementing successful programs.²⁷

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 from voucher systems focused on sport participation to broader-based assistance programs at state and regional levels.²⁸ In addition, state and federal governments provide funding for the development and improvement of facilities in communities.

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.²⁹

Royal Life Saving Society Australia (RLSSA) has conducted a series of research projects investigating Australian children's swimming and water safety ability, including the social context, the economic implications and overall health and wellbeing benefits. Data in a recent benchmarking report provides evidence that children from high socio-economic areas are more



likely to be attending swimming lessons (and from an earlier age) than children from low socio-economic areas. RLSSA continues to advocate to remove barriers and ensure access to quality swimming and water safety education by all Australian children.

In addition to education and health benefits, sport, fitness and recreation activities bring communities together by providing a positive place and context for people to connect and share a common focus. Activities can provide a platform for people to engage and can promote awareness of broader community issues including those being experienced by marginalised individuals. These are important considerations in determining initiatives to assist people with meeting the costs of activities. The activities can contribute to a stronger community as well as raising awareness and addressing social justice issues.

Lack of Consistency in Definitions and Data

AusPlay is a national population tracking survey funded and led by the ASC to provide participation data for the sport sector and to inform decisions.³⁰ The data can be used by governments, industry and the broader community to assist in policy, investment and strategic planning, as well as resource planning strategies relating to equipment, facilities and the recruitment and retention of people for required roles.

There is further research to carry out as each sub-sector recognises 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 enterprises 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.

Demand and Supply of Facilities and Infrastructure

The shift towards multipurpose facilities is a reflection of 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; owned by councils and managed by the private sector; or owned and managed by 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 is 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 are not characterised by a reliance on buildings but, rather, infrastructure including accessibility, land management policy, legislation, the 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. Many state and national parks are remote and are currently accessible only by private vehicle. Consideration should be given to planning public transport options to these areas in the future to minimise pollution and make them more accessible to all socio-economic groups within the community.

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, regional and, most acutely, in remote areas. 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 culturally and linguistically diverse (CALD) communities, and for the older generation. These groups can all benefit differently from having access to sporting and aquatic facilities, and young people will have an outlet for their sporting interests.

Having access to sporting and aquatic 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 areas.³¹ Due to the lack of adequate facilities, health concerns in rural and remote areas continue 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 such access can provide. If this transpires then councils and sporting clubs will need a workforce with diverse skills to engage with the community.

The CALD community will benefit by being able to better integrate into the greater community and, for example, learn about water safety, as communities such as the CALD demographic group are at a greater risk.³² 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.

Governance and Ethics

Organisations operating in these sectors 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 the goodwill of parents to deliver services to their members. Whether at a club, regional or state level, volunteer organisations are subject to these governance structures. Effective governance helps to ensure more effective decision-making, with the organisations demonstrating transparency, accountability and responsibility in the activities undertaken and resources expended.

The ASC developed best practice guidelines for the governance of sporting organisations in 2002 which 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 and territory Departments of Sport and Recreation to encourage and assist state and club sporting organisations to adopt similar principles.

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

Integrity in sport incorporates measures to discourage the use of performance enhancing drugs ('doping') as well as match fixing and other forms of corruption. Incidents of these practices at the highest levels of sport have been reported in the media 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 the Australian Sports Anti-doping Authority (ASADA) provides information and support, including e-learning courses for athletes, coaches and other support people, and students and sporting organisations.³³

The national *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. The Australian Childhood Foundation (ACF) is now working with the ASC on developing the *National Safeguarding Children in Sport Strategy* (NSCSS). This builds on previous work which produced resources to support the implementation of child-safe sport initiatives.³⁴

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 Australian Industry and Skills Committee (AISC) in 2017 to lead the cross-sector project, *Consumer Engagement via Online & Social Media*.³⁵ Project research found that internet access has been growing exponentially, and the latest figures (2017) show that there are 13.7 million broadband internet subscribers and 26.3 million mobile handset subscribers in Australia.³⁶ 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.³⁷

There are many instances 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.³⁸ Technology has also improved the communication at a club level with registration processes, the dissemination of newsletters, competition draws and cancellation notices, etc., all available via email and web pages.

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

All types of fitness professionals (fitness businesses, sole traders, exercise professionals, and even students) admit



to being concerned that the lack of qualifications of many social media fitness personalities is a potential source of damage to the industry. The challenge is for more fitness businesses to find a way to educate the audience in terms of the quality of – and the qualifications behind – the advice.³⁹

Social media and internet search engines are providing an opportunity for like-minded people to connect and share resources online, whether to establish start-up groups, local informal groups, or groups interested in walking 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 material 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 blogs.⁴⁰ This trend is a potential hazard for consumers who would have previously looked to have their health and fitness needs met by going to a gym or engaging a personal trainer. This has the ability to disrupt the industry, and the sector now has to determine the best way that fitness and personal training can be delivered in the future (i.e. 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 Society Australia 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 recent campaign that urges 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 has focused its communications through this widely popular social channel. Through Facebook’s advanced audience targeting, Royal Life Saving has been able to dedicate communications to key at-risk audiences.⁴¹

In 2016 the 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.⁴² 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 ten years, in particular, have seen a virtual explosion of technological developments in the outdoor sector, 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 (personal locator beacons), EPIRBs (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 button.⁴³ This can potentially have an impact on the hiking guide industry, as consumers who previously would have hired a guide may now feel, due to 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 location information about an individual’s location and enable that individual to signal for help, but are no substitute for preparing for the activity by sourcing maps, appropriate supplies, gaining local knowledge, and being abreast of weather and fire forecasts. The Australian geography provides barriers to the effectiveness of some of these devices, however, and can result in people becoming lost, disoriented, and being in situations for which they are neither prepared nor equipped.

Employment and Skills 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 the 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 shown in the following graphs should be used only 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 roles 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, however, reporting may significantly underestimate the number of people in these roles who register other roles as their primary occupation. The data should always be contrasted with other industry- and segment-specific data and information where available.

Sports Coaches, Instructors and Officials - Job titles may include: 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 titles may include: Fitness Instructor

Outdoor Adventure Guides - Job titles may include: Bungy Jump Master, Fishing Guide, Hunting Guide, Mountain or Glacier Guide, Outdoor Adventure Instructor, Trekking or Bushwalking Guide, Whitewater Rafting Guide, Other Outdoor Adventure Guide.

- 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 sport and recreation occupations. Outdoor Adventure Guides are expected to have 28% growth over the next five years, while Sports Coaches, Instructors and Officials are projected to grow by 26%, Fitness Instructors by 24% and Sports and Fitness Workers by 23% over the same period. **Figure 1** outlines projected growth in each occupation, while **Figure 2** outlines employment levels of each occupation. ⁴⁴

Figure 1 Projected growth in selected Sports and Recreation-specific occupational groups 2017-2022 (%)

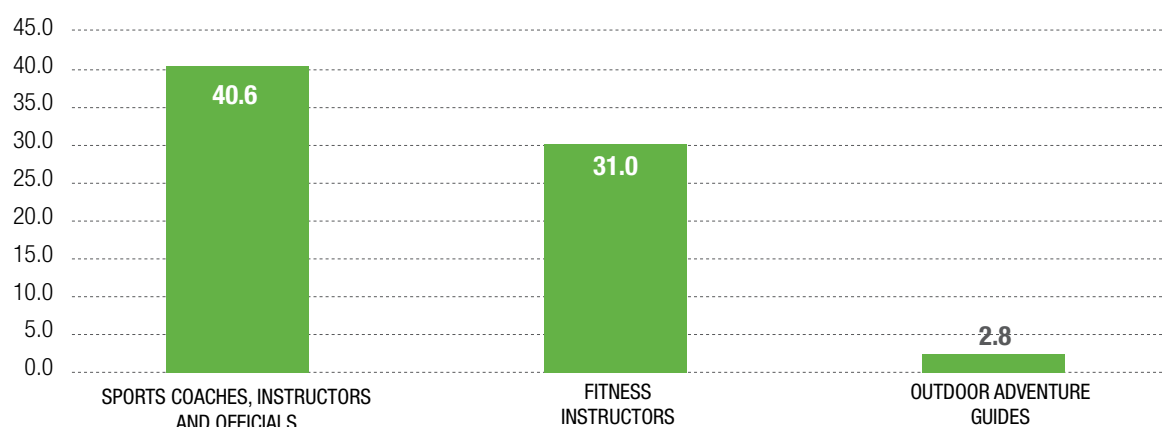


Source: Australian Department of Jobs and Small Business, 2017 Occupational Projections – five years to May 2022

The occupations within the scope of this IRC, as outlined in the May 2017 Department of Small Business and Employment Labour Force Survey, showed that Sports and Fitness Workers number 84,500, while Sports Coaches, Instructors and Officials total approximately 40,600. A full breakdown can be seen in the following chart (Figure 2). Please note that anecdotal information from the outdoor recreation sector queries the number included in the Department of Jobs and Small Business projections as not being a true reflection of the workforce.



Figure 2 Employment levels of Sports and Recreation- specific occupational groups ('000), 2017



Source: Australian Department of Jobs and Small Business, 2017 Occupational Projections – five years to May 2022

When looking at specific occupations within the sport and recreation sector, it can be seen that **Sports Coaches, Instructors** and **Officials** have a median age of 22 years and that the gender split is fairly even (with 51% men and 49% women). The majority of jobs fall within the Education and Training industry (51%) and Arts and Recreation Services (with 43%).⁴⁵ 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. Just under half of the full-time workforce earns between \$51,000 and \$70,000.⁴⁶

For Fitness Instructors the median age is 37 years while females make up 59% of the workforce (with males at 41%). Most workers within these occupations are employed in Other Services (41%), and 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 New South Wales (37%), Victoria (24%) and Queensland (20%). Most workers in this occupation have attained a Certificate III or IV as their highest education attainment level.⁴⁷

For Outdoor Adventure Guides the median age is 37 years. The gender split for this occupation is weighted towards males (70%) while females make up 30% of the

workforce. The main industries where these workers are employed are Education and Training (37%), Arts and Recreation Services (34%) and Health Care and Social Assistance (14%). New South Wales has the greatest number of outdoor adventure guides (43%) followed by Victoria (25%) and Western Australia (19%).⁴⁸

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.⁴⁹

A recent study shows that, across New South Wales and Victoria, 113,500 full-time equivalents are employed in nature-based outdoor recreation. This figure backs up the sector's assertion that outdoor adventure guides make up only a proportion of those employed within outdoor recreation.

Table 3 Headline estimates of the economic value of New South Wales (NSW) nature-based outdoor activity

Participation by NSW citizens (incidences of active and passive nature-based outdoor activity)	53 million
Hours of physical activity by NSW citizens	47 million
Nature-based outdoor activity expenditures - all sources (\$ billion, 2014)	\$7.65
Gross value-added (\$ billion, 2014)	\$6.7
- Direct	\$4.3
- Indirect	\$2.4
FTEs (full-time equivalents) (2016)	77,300 FTEs
- Direct	57,500 FTEs
- Indirect	19,800 FTEs
Recreation value (consumer surplus, \$ million 2014)	\$890
Avoided costs to the NSW health care system (\$ million 2014)	\$480

Source: Marsden Jacob Associates (2017) New South Wales nature-based outdoor economy: key estimates and recommendations.

Table 4 Headline estimates of the economic value of Victorian nature-based outdoor activity

Participation by Victorian residents (incidences of active and passive nature-based outdoor activity)	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 (\$ billion, 2014)	\$7.4
Gross value-added (\$ billion, 2014)	\$6.2
- Direct	\$4.1
- Indirect	\$2.1
FTEs (full-time equivalents) (2014)	71,000 FTEs
- Direct	56,000 FTEs
- Indirect	15,000 FTEs
Recreation value (consumer surplus, \$ million 2014)	\$455
Avoided costs to the Victorian health care system (\$ million, 2014)	\$265

Source: Marsden Jacob Associates (2016) Victoria's nature-based outdoor economy: key estimates and recommendations.



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 Operator and Aquatic Exercise Instructor every year. Difficulties have been reported in recruiting qualified staff, particularly in regional areas.⁵⁰

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 in conflict with customer engagement and fulfilment. Often, the skills required to manage safety are not available internally and the ability to build upon foundation skills is an important trait for employees in the industry.

This is recognised by the Australian Water Safety Council which states in its *Australian Water Safety Strategy 2016-2020* 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.'⁵¹ Royal Life Saving Society Australia (RLSSA) has conducted a series of research projects investigating Australian children's swimming and water safety ability, including the social context, the economic implications and overall health and wellbeing benefits. The data supports the need for continued advocacy and investment to remove barriers and ensure access to quality swimming and water safety education by all Australian children.⁵²

Diverse Workforce and Work Arrangements

Attraction and retention

Recent research conducted by Fitness Australia has shown that business models in the industry fluctuate and that many businesses still primarily use a contractor rather than employee model. This has many implications for the capacity of 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 the issue of retention or enable longer term solutions to be examined. There is also a high number of casual and self-employed professionals in the most common job roles.

The improvement of qualifications 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 connection to others who are different but may have similar interests and values, and it enhances community identification.⁵³ Nationally, community sport and recreation relies on 2.3 million volunteers who contribute to running sport and recreation activities.⁵⁴

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 are understated.

Women in sport

The Women Leaders in Sport (WLIS) program is an Australian Government initiative that is managed by the 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.⁵⁵ 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 traditionally under-represented. State initiatives also target increasing female participation rates more broadly in many aspects of physical activity.



Future Skills Needs

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 2030.⁵⁶ It is important that sports and fitness instructors have the skills to effectively communicate, listen, demonstrate empathy, honesty and integrity, and be adaptable.⁵⁷ 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. Assisting coaches to become qualified either through the VET system or through the various accreditation pathways of National Sporting Organisations (NSOs) 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, who is an individual that provides ongoing advice and support to coaches. The ASC has trialled methods to train Coach Developers in a number of pilots within 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 reported internationally.⁵⁸

National sporting organisations are increasingly focused 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' discipline 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, interpersonal 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 critical that relevant training packages for sport and recreation include competencies regarding soft skills. These types of skills are included in the existing training package and some are currently being updated. Where necessary some units may be imported from other training packages.

Fitness Australia reports 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.

There is also a need for some of the STEM skills to be included in training packages for administrators and sole traders within sport 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 via the creation of specific packages.

Recent surveys conducted by SkillsIQ in preparing for current training package product updates analysed national sports organisations in respect to the most 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.

The following priority skills areas have been identified: child protection; diversity and inclusion; drugs in sport; harassment and discrimination; integrity in sport; mentoring skills; presenting skills; and sports governance. These priority areas are being incorporated across training package products as part of the update currently in progress.

Key Generic Skills – Ranked in Order of Importance

Note: 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 2018 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	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 other human beings, whether helping them find, choose or buy something. Ability to supply customers' wants and needs. 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 / SELF-MANAGEMENT	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/move 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 technical means, understand their interrelation with life, society, and the environment. Ability to understand/apply 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)	Sciences, mathematics and scientific literacy.



Key Drivers for Change and Proposed Responses

Broad Consultation

A widespread **multichannel consultation** involving a broad range of stakeholders representative of the sectors has been conducted to identify and validate the exact nature of the skills needs in the industry, and the respective training package product update requirements, as follows:

- All Sport and Recreation Industry Reference Committee (IRC) members representing the following key bodies:
 - Above and Below Adventure Company
 - Queensland Fitness, Sport and Recreation Skills Alliance
 - Australian Sports Commission
 - Recreation SA
 - Australian Services Union
 - Royal Life Saving Society Australia
 - Australian Workers Union
 - The Outdoor Education Group
 - Community Sport Australia Ltd
 - The Scout Association of Australia

Fitness Australia

SkillsIQ met with the Sport and Recreation IRC over the December 2017 to March 2018 period to draft, review and finalise the content of the 2018 Industry Skills Forecast. The IRC members represent a cross-section of interests in the training package products and were able to reach out to their stakeholder networks and present available data to challenge or clarify the draft content. An online survey conducted in November to December 2017 was also available to all stakeholders. The draft document was posted on the SkillsIQ website for a public consultation period and made available to over 17,000 stakeholders, requesting their feedback. Desktop research, analysis of the available statistical data and a generic skills survey were also used to inform the Forecast.

In addition, sector-specific and targeted consultations have been conducted as part of current projects in respect to the Sport and Outdoor Recreation Training Package products, with a view to establishing priority skills needs and issues in the Fitness, Aquatic and Community Recreation industries, for which qualifications were last updated in 2015.

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 qualifications 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 of 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 by the AISC. These projects incorporate a national consultation process to develop and validate proposed

training package products. The process includes a combination of workshops with a total of 12 expert working groups and Technical Advisory Committees (TACs), as well as representatives from individual sports and recreation areas. Draft training package products have been provided on the SkillsIQ Online Feedback Forum for public feedback. Information from this process has also been used to inform this 2018 Industry Skills Forecast.

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

Fitness Industry

In the period since the SIS Training Package products were 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 who 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.

Fitness Australia as the peak national industry association has been conducting research through a range of surveys and interviews and using statistical data from registration and renewals to inform its position in relation to the Fitness qualifications which were endorsed in 2015. Considerable detail has been submitted to SkillsIQ to test more broadly and inform project work to update the qualifications and ensure alignment with changing trends in job roles and skills requirements.

There is an expressed need to update entry requirements to ensure unnecessary barriers are not negatively impacting the supply of a professional labour force; that qualification structures and the core and elective requirements are aligned to existing and emerging job roles; and that streams or clusters of units can be aligned to job functions to build vocational pathways and career progression.



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

Other potential content for skill sets include a Leader skill set to support program development for varied populations and business models. The continued demand for outdoor services has highlighted the need to focus on a broad range of aspects relating to 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 Response

Update work is continuing in respect to the sport and outdoor recreation industries.

The Sport and Recreation IRC is proposing an update to the training package products in respect to the fitness industry and the role of the Aquatic Instructor. Current units of competency need to strengthen the alignment of the qualifications with key job roles and changes in demand, markets, community expectations and regulation. This update would also include addressing skills requirements in specific areas such as client populations and service delivery environments.

A number of key risks have been identified in the following table, should the update of the training package products (in line with addressing the skills needs voiced by industry) **not** take place.

STAKEHOLDER	RISK OF NO CHANGE
Employers	<ul style="list-style-type: none"> - Risk of poor quality or negative effects of fitness instruction where professional and up-to-date best practice skills and knowledge are not incorporated - Cost implications include time and resources allocated to conduct training that is not aligned to customer demand and expectations - Business risk where instructors are contractors or self-employed and lack the skills and knowledge to implement appropriate reporting and practices
Employees	<ul style="list-style-type: none"> - Inability to conduct all duties of role adequately and/or progress - Increased risk to client health due to use of inappropriate practices
Clients	<ul style="list-style-type: none"> - Risk of injury or drowning - Frustration at not being able to access appropriate exercise or fitness services - Inability to access appropriate water safety and swim classes - Lack of confidence and ability to participate in water activities
Students	<ul style="list-style-type: none"> - Insufficient skills upon graduation, requiring additional training to meet industry/job role requirements - Unnecessary barriers to training - Lack of vocational pathways and career progression
Training Providers	<ul style="list-style-type: none"> - Training offered fails to match industry needs, and quality and reputation of course delivery are compromised - Enrolment in full qualifications results in high non-completion rates as students leave when they acquire the necessary unit of competency to attain employment

The proposed response aims to ensure that fitness services are delivered by a professional, trained and skilled workforce and that the training package products support current and emerging job roles. The use of skill sets and clusters of units to meet specific needs will enhance the direct relevance of training package products to job roles, enabling market demands to be met more effectively.

Impact of Recommended Changes

RTOs

The implementation of new units of competency creates flow-on impacts and costs for RTOs in relation to administrative systems, training resources and assessment materials. In the short term, it is anticipated that there will be an administrative burden on RTOs as they transition to delivery of the new training package products and update their scope of registration, resources and assessment tools. This is, however, unavoidable. RTOs will be required to ensure the appropriate equipment and resources are available for the delivery of Fitness training package products.

Employers

The use of updated units of competency will allow employers to have access to a more appropriately skilled and professional workforce. The removal of unnecessary barriers to training and a qualification structure incorporating structured skill sets aligned to industry needs and market demands will enhance the reliability of the workforce and the return on training investment. Strengthened career pathways will improve the retention of people in the industry and contribute to more professional standards and consistency in quality.

Students and Employees

Students and employees will gain better outcomes from training with updated units of competency that reflect current industry practices and expectations. This will provide them with increased confidence in their skills and their ability to provide a more professional service in meeting client requirements.

Customers

Customers will benefit from receiving more specialised and professional fitness services with reduced risks and better health outcomes.



Proposed Schedule of Work

2018–19

YEAR	PROJECT TITLE	DESCRIPTION
2018–19	Update Fitness training package products	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: <ul style="list-style-type: none">• SIS30315 - Certificate III in Fitness• SIS40215 - Certificate IV in Fitness• SIS40215 - Diploma of Fitness
2018-19	Update Aquatic Instructor training package products	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.



2018-19 Project Details

PROJECT TITLE	UPDATE FITNESS TRAINING PACKAGE PRODUCTS
Description:	<p>Qualifications will be updated 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>Research conducted by the peak body in the sector has identified the need to:</p> <ul style="list-style-type: none"> • strengthen the alignment of training package products with changes in job roles and market segments • ensure the balance between business and technical skills applies to the diverse range of service offerings • enhance the application of consistent standards which is integral to the professionalism of the sector • enhance career pathways and reduce turnover. <p>This research has informed the Skills Forecast and validated and clarified data from ABS source in the section Employment and Skills Outlook.</p> <p>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. See section Key Drivers for Change and Proposed Responses for more details.</p>
Ministers' Priorities Addressed:	<p>The proposed update of the training package products is aligned with the priorities of the Council of Australian Governments (COAG) Industry and Skills Council and has used consultation activities and stakeholder engagement to identify:</p> <ol style="list-style-type: none"> 1. Opportunities to identify and remove obsolete training package products from the system, although the update in 2015 consolidated a significant amount of training package content 2. Industry expectations for training delivery and assessment, which will be documented within the Companion Volume Implementation Guide 3. Opportunities to enhance the portability of skills from one related occupation to another 4. Opportunities to create training package products that may have application to multiple industry sectors 5. Opportunities for the development of skill sets including a new skill set for the Leadership and Outdoor Fitness Instructors.
Consultation Plan:	<p>National industry consultation will be conducted with key stakeholders, where appropriate, who will be consulted 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 of Project and Key Dates:	<p>Estimated duration: 12 months from the receipt of the relevant Activity Order.</p>
Training Package to be Revised:	<p>SIS Sport, Fitness and Recreation Training Package</p>
Skill Set/s to be Developed/Updated:	<p>Skill sets for Leadership and Outdoor Fitness Instructors in the Fitness industry to be developed</p>



PROJECT TITLE	UPDATE FITNESS TRAINING PACKAGE PRODUCTS
Qualification/s to be Developed/Updated:	Three qualifications to be updated: <ul style="list-style-type: none"> • SIS30315 - Certificate III in Fitness • SIS40215 - Certificate IV in Fitness • SIS50215 - Diploma of Fitness
Unit/s of Competency to be Developed/Updated:	31 units to be updated as follows: <ol style="list-style-type: none"> 1. SISFFIT001 Provide health screening and fitness orientation 2. SISFFIT002 Recognise and apply exercise considerations for specific populations 3. SISFFIT003 Instruct fitness programs 4. SISFFIT004 Incorporate anatomy and physiology principles into fitness programming 5. SISFFIT005 Provide healthy eating information 6. SISFFIT006 Conduct fitness appraisals 7. SISFFIT007 Instruct group exercise sessions 8. SISFFIT008 Instruct water-based fitness activities 9. SISFFIT009 Deliver pre-choreographed or prescribed community fitness 10. SISFFIT010 Deliver pre-choreographed or prescribed group exercise to music 11. SISFFIT011 Instruct approved community fitness programs 12. SISFFIT012 Instruct movement programs to children aged 5 to 12 years 13. SISFFIT013 Instruct exercise to young people aged 13 to 17 years 14. SISFFIT014 Instruct exercise to older clients 15. SISFFIT015 Collaborate with medical and allied health professionals in a fitness context 16. SISFFIT016 Provide motivation to positively influence exercise behaviour 17. SISFFIT017 Instruct long-term exercise programs 18. SISFFIT018 Promote functional movement capacity 19. SISFFIT019 Incorporate exercise science principles into fitness programming 20. SISFFIT020 Instruct exercise programs for body composition goals 21. SISFFIT021 Instruct personal training programs 22. SISFFIT022 Instruct aquatic sessions for specific population groups 23. SISFFIT023 Instruct group personal training programs 24. SISFFIT024 Instruct endurance programs 25. SISFFIT025 Recognise the dangers of providing nutrition advice to clients 26. SISFFIT026 Support healthy eating through the Eat for Health program 27. SISFFIT027 Conduct health promotion activities 28. SISFFIT028 Apply evidence-based practice to exercise programs 29. SISFFIT029 Apply anatomy and physiology to advanced personal training 30. SISFFIT030 Instruct advanced exercise programs 31. SISFFIT031 Implement injury prevention strategies <ul style="list-style-type: none"> • Potential new units and changes to imported units subject to further consultation in relation to job roles.

PROJECT TITLE	UPDATE AQUATIC INSTRUCTOR TRAINING PACKAGE PRODUCTS
Description:	Qualifications will be updated to ensure training package products meet the requirements of industry growth and credibility through standards of professionalism, customer care and service.
Rationale:	Please refer to the appropriate references within this Industry Skills Forecast. Industry has expressed the need for a skill set option for the job role of Aquatics Instructor due to ongoing and increasing demand and difficulties in recruiting qualified staff. An elective bank relating to this job role is currently in the qualification SIS30315 - Certificate III in Fitness . A skill set will enable people to complete a qualification more targeted to the job role.
Ministers' Priorities Addressed:	<p>The proposed update of the training package products is aligned with the priorities of the COAG Industry and Skills Council and has used consultation activities and stakeholder engagement to identify:</p> <ol style="list-style-type: none"> 1. Opportunities to identify and remove obsolete training package products from the system, although the update in 2015 consolidated a significant amount of training package content 2. Industry expectations for training delivery and assessment, which will be documented within the Companion Volume Implementation Guide 3. Opportunities to enhance the portability of skills from one related occupation to another 4. Opportunities to create training package products that may have application to multiple industry sectors 5. Opportunities for the development of skill sets including a new skill set for the Aquatic Instructor.
Consultation Plan:	National industry consultation will be conducted with key stakeholders, where appropriate, via face to face workshops, webinars and one-on-one interviews. There will also be opportunities for all interested parties to provide comments online via the SkillsIQ Online Feedback Forum.
Timing - Estimated Duration of Project and Key Dates:	Estimated duration: 12 months from the date of the receipt of the Activity Order.
Training Package to be Revised:	SIS Sport, Fitness and Recreation Training Package
Skill Set/s to be Developed/Updated:	New Skill Set to be adapted from an existing qualification elective bank for the role of an Aquatic Instructor.
Qualification/s to be Developed/Updated:	Nil
Unit/s of Competency to be Developed/Updated:	<p>The following two units of competency will be updated for inclusion in a new skill set for the role of an Aqua Instructor:</p> <p>SISCAQU002 - Perform basic water rescues</p> <p>SISCAQU008 - Instruct water familiarisation, buoyancy and mobility skills</p> <p>Imported units of competency from BSB and HLT Training Packages will be used where required, to reduce duplication. These units are currently listed as Group A electives in the SIS30315 Certificate III in Fitness.</p>



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