Skills Needs Assessment for the Sport and Recreation

SkillsActive

September 2005

1. EXECUTIVE SUMMARY

1.1 Introduction

This is the Skills Needs Assessment for the Sport and Recreation, the largest of the Active Leisure and learning sub-sectors. It provides a detailed examination of needs, enabling SkillsActive to be the authoritative voice of employer skill needs in the sector. Skills Needs Assessments are an integral part of Sector Skills Agreements, a key process in ensuring that employers have the right skills to support the success of their business and individuals have the skills they need to be employable and personally fulfilled.

1.2 The SkillsActive industry and workforce

Sector definition
Sport means all forms of physical activity which…aim at expressing or improving physical fitness and mental wellbeing.

Size of the sector
The Sport and recreation sector had an estimated Gross Value Added (GVA) output of £5.2 billion in 2004 and employed an estimated 363,000 people. This accounts for some 61 per cent of the total UK GVA for the sector and 63 per cent of UK-sector employment. When expressed as a proportion of total England all-sector GVA and employment, SkillsActive industries account for 0.6 per cent of Total England output and 1.2 per cent of employment.

Geographical location
The Sport and Recreation workforce is particularly concentrated in the South East of England, with over 60,000 Sport and Recreation workers based there (17 per cent of the total). The North West of England and Scotland are also big employers of Sport and Recreation workers. Wales and Northern Ireland employ the smallest proportion of the Sport and Recreation workforce, accounting for 25,500 workers in total.

Profile of the workforce
Experian's analysis of the **personal profile** of the SkillsActive workforce shows that:

- 54 per cent of the SkillsActive workforce in England is female, 46 per cent male. This balance is counter to that across all-sector employment where males are in the majority (52 per cent compared to 48 per cent of females);

- the workforce has a higher proportion of young people (aged 16 – 24) than the workforce across England as a whole – but these will be concentrated at 18-plus as regulations and licensing requirements discourage the employment of those aged under-18; and

- the workforce is predominantly drawn from white ethnic groups (95 per cent) but this is broadly in line with employment across England (93 per cent).

In terms of **occupation**, Professional occupations, Associate Professional and Technical occupations, Personal Service occupations and Elementary occupations are more important within Sport and Recreation than they are for all sectors' workforce.

89 per cent of the workforce in the sector are **employees**, 11 per cent **self-employed**. Again, this is not out of kilter with the all-UK workforce where 13 per cent are self-employed.

However, the sector does have a significantly higher proportion of **part-time** workers – 47 per cent compared to 22 per cent across all sectors in the UK.

According to Sport England, there are over 5.2 million **volunteers** in the Sport and much of the sector would find it difficult to operate without the help of these unpaid staff.

1.3 Key drivers of business competitiveness

Sport and Recreation is subject to different forces which drive current performance:

- **consumer trends**: fears of obesity and disease associate with a less active lifestyle have increased demand for active leisure. In addition, it is anticipated that the granting of the 2012 Olympic Games to London will increase participation in sport. The exact pattern of demand for individual activities is, however, more difficult to predict;

- the **ageing population** in England will increase the proportion with leisure time, but whether this impacts on demand will depend on how the Government reacts to the log-debated pensions 'crisis'. Having said that, the ageing of the population will shift towards more low impact activities such as golf and walking;

- the impact of **globalisation** and **technology** are expected to be muted and limited to management of bookings and relationships with consumers;

- **innovation** rates are thought to be slight, with some innovation in provisions but with most traditional sports remaining essentially the same.

Much will depend on the effectiveness of Government policy towards sport. Targets are in place which will directly impact such as, for example aiming for 70 per cent of the population to participate in sport.

1.4 Implications for skills demand

Current skills and qualification profile

The distribution of qualification attainment in the Sport and Recreation sector is slightly lower than that seen across the whole-England economy. 26 per cent are qualified to Level 4 and above (29 per cent across all sectors of the economy) and, at the other end of the scale 31 per cent have no, or only very low levels of qualifications. 27 per cent have a Level 2 qualification, higher than for all sectors at 22 per cent. However, it needs to be noted the distinction between general levels of qualifications and sector-specific qualifications which are believed to be in short supply but are required by the industry for regulatory and licensing purposes.

Current recruitment and skill shortages

Data on recruitment and skill shortages is available from the National Employer Skills Survey 2003 which serves Sport and recreation rather better than SkillsActive's other sectors. Looking initially at **recruitment difficulties**:

- 22 per cent of establishments in the Active Leisure and Learning sector were facing vacancies, nine percent stated that these vacancies were hard-to-fill and six per cent that the reason they were hard-to-fill is due to shortages of skills, experience or qualification amongst applicants (skill shortage vacancies). These levels are comparable to those of England as a whole;

- the main areas of shortage were for team working skills, communication skills, technical and practical skills and customer handling skills.

Skill gaps (where members of the existing workforce are thought to be deficient in some area of skills) affect 16 per cent of establishments in the sector (higher than the 20 per cent reported in England as a whole). This suggests that 17,000 employees in the SkillsActive workforce (some seven per cent of all staff) have skills weaknesses which need addressing. The volume of skill gaps far exceeds that of recruitment problems. The nature of skill gaps are similar to those for recruitment difficulties – customer handling skills, communication skills and team working skills.

Future skill needs

The sector faces a significant recruitment challenge:

- it is forecast that the Sport and Recreation sector will grow at a rate above that for the whole economy over the next 10 years. On this basis, overall levels of employment in England in 2014 will be 580,000, 100,000 more than the current level, or an increase of 21 per cent; and

- in addition to this the sector also will have to recruit 57,500 annually to cope with **replacement demand** – to replace those who leave employment in the sector each year to either work in another sector, to retire, or to become unemployed.

During the time in which Experian forecasts were being developed for the sector it was announced that London had won the privilege of hosting the 2012 Olympic Games. As a consequence, the quantitative impact that this will have on the Sport and Recreation sector has not been factored into the forecasts.

Within this overall growth, forecasts do not predict significant changes to the profile of the workforce, or to the occupational structure or to qualification levels. In this sense, it is a case of more of the same, not a shift in the nature of what is required. However, it is possible that some employers, in seeking to develop their competitive advantage, will seek to improve the level of management, communication and customer handling skills amongst their workforces.

2. INTRODUCTION/ BACKGROUND

SkillsActive, the Sector Skills Council (SSC) for Active Leisure and Learning, forms part of the Government's Skills for Business Network. SkillsActive has been charged to lead the skills and productivity drive in the Active Leisure and Learning industry. It aims to bring employers and practitioners together to take a fresh look at the skills and training needs of organisations and individuals across Sport and Recreation, Health and Fitness, the Outdoors, Playwork and Caravan industries.

As part of the government's Skills White Paper the Sector Skills Development Agency has commissioned the Sector Skills Councils to produce a Sector Skills Agreement (SSA) on behalf of the sector it represents. SkillsActive is one of six SSCs to produce a SSA in tranche two, during the 12 months running from March 2005.

The basis of the agreement comprises five key stages, the first of which is the Skills Needs Assessment. SkillsActive has determined to produce a suite of ten reports to consider each of its five sub-sectors individually, and each Home Country separately. This is the report for Sport and Recreation.

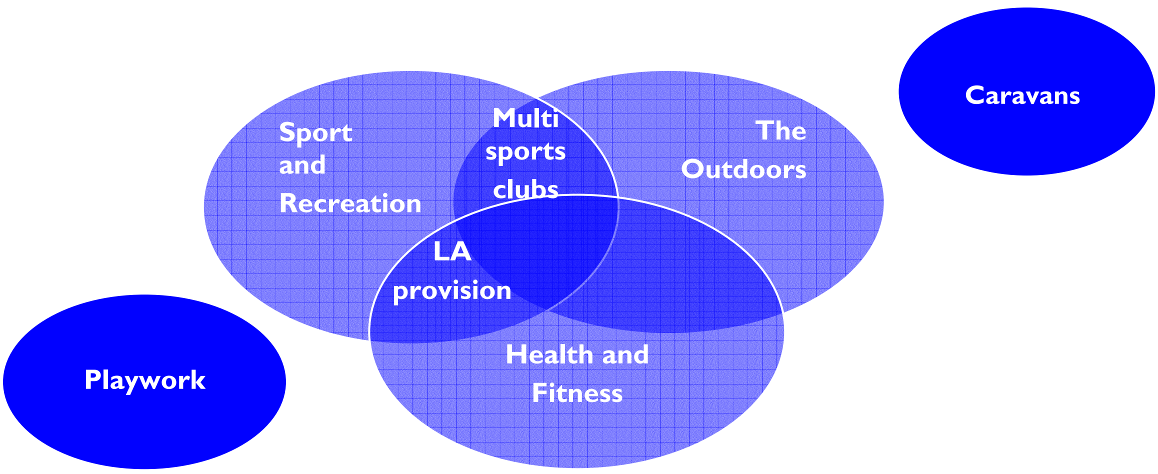
2.1 Aims and objectives

The main objectives of the Skills Needs Assessment are to:

- Define the Active Leisure and Learning sector in terms of size and structure
- To profile the workforce
- Assess the current performance of the sector
- Explore the key external drivers of change
- Determine their impact on current and future skills needs
- Provide benchmark statistics for the sector

2.2 SkillsActive: Active Leisure and Learning's five sub-sectors

The Active Leisure and Learning sector comprises five sub-sectors: Sport and Recreation, Health and Fitness, the Outdoors, the Caravan Industry and Playwork. There is most overlap and synergy between the first three sub-sectors:



Local authority services are often contracted out or provided by trusts, particularly in England and this links in with Playwork's public provision as well.

2.3 Government policy on sport, education and skills

Skills Needs Assessments are an integral part of Sector Skills Agreements, identified in Government policy[1] as being a key process in ensuring that employers have the right skills to support the success of their business and individuals have the skills they need to be employable and personally fulfilled.

2.3.1 Government policy on sport, education and skills: UK & England

Sports Strategy
The Government's strategy for sport is firmly founded on the principle of increasing participation in sport and physical activity across the whole population. Sport England's new mission and business objectives are also very much focussed on that principle.

The Government's Plan for Sport, an action plan for delivery of the vision set out in the Government's sports strategy, the report 'A Sporting Future for All', was published in March 2001. Progress towards implementation is reported on annually.

The Plan for Sport recommended that further work be done in key areas, and separate reports have since been published including "The Role of Sport in Further and Higher Education (2002)" and "The Coaching Task Force Report (2002)".

In December 2002 Game Plan, a strategy for delivering Government's sport and physical activity objectives, was published by DCMS/the Strategy Unit. Game Plan[2] provides a broad context and research evidence for sports policy and its 50 recommendations complement and build on those in the Government's Plan for Sport. Game plan is focused on England but takes account of overlap with the devolved institutions where it occurs at a UK level.

Game Plan set ambitious targets for increasing participation[2] which have set the agenda for Sport England. As a result Sport England's published The Framework for Sport in England[3] with a vision to make England an active and successful sporting nation. It has set the objective of increasing and widening the base of sports participation and the target of achieving a 1% growth in participation annually and at least 50% of the population playing sport by 2020. The main target in the strategy is for 70% (currently ~30%) of the population to be reasonably active (for example 30 minutes of moderate exercise five times a week) by 2020.

Public health and physical activity
This target is heavily linked to the Government's Public Health Strategy. Following several reports into healthcare and the economy by Derek Wanless, which concluded a preventative approach to health care was the most cost efficient, the Government published a White Paper on Public Health called "Choosing Health"[4] in November 2004. The paper was aimed at [3]making healthy choices easier for the population and outlined the vast contribution to be made to public health in England by sport and active recreation, pointing out that more than 30% of people took part in some form of active recreation at least once a week during 2002.

[1] See the White Papers *21st century: Realising our Potential*, 2003 and *Getting on in Business, Getting on in Work*, 2005
[2] Game Plan
[2] *"increasing significantly levels of sport and physical activity within the target of achieving 70% of the population as reasonably active – defined as participating in 30 minutes of moderate exercise five times a week – by 2020".*
[3]The Framework for Sport in England: making England an active and successful sporting nation, Sport England, 2004
[4] Choosing Health 2004 www.dh.gov.uk

In the White Paper SkillsActive was tasked with working alongside Skills for Health to enhance the skills of exercise professionals, coaches and others within the SkillsActive workforce. Work has already begun to roll out Health Trainers who will sign-post active recreation opportunities, amongst other health related advice.

The Government developed a Physical Activity Action Plan called "Choosing Activity" to implement the physical activity elements of the white paper. Choosing Activity also outlines the Chief Medical Officer's recommendations on physical activity. It considers how best to promote physical activity by making available the right information, encouraging young people, boosting the opportunities to become active in the local community and by encouraging a more active approach to healthcare and workplaces.

Manifesto pledges
Labour's manifesto also proposed the establishment of 'Sports Direct' a single point of access for sport which will make it easier for people to find out about local sports opportunities across the UK. A commitment is also made for 'almost everyone' to be within 20 minutes of a good multi-sport facility by 2008. Labour has committed to give sport the same attention as English and Maths in primary education and by 2010 all children will receive two hours high-quality physical education or sport per week in school hours. Additionally, every child who wants it will have access to a further two to three hours sport per week.

Extended schools
Much of the extra two to three hours sport per week referred to in Labours manifesto[5] will be accessed through the extended school day. In June 2003 the Government published a prospectus on extended schools entitled "Extended schools: Access to opportunities and services". The prospectus sets out what schools can offer their local communities by extending the schools day from 8am to 6pm and offering additional services such affordable childcare and adult education. The extended schools are intended to me more than simply "homework clubs", and will offer a wide variety of activities for children and young people including play and sport.

Sports clubs
Sport England[5] [6] calculate that there are over 5.8 million volunteers in the Active Learning and Leisure Sector across the UK, many of whom work to support small voluntary sports clubs around the country. The CCPR (Central Council for Physical Recreation) has worked hard over many years to create a climate in which small clubs like this can flourish. Thanks to their lobbying, in 2002 a Community Amateur Sports Club scheme was created, which aims to keep money in grassroots sport and recreation by exempting sports clubs from certain taxes. To date approximately £4 million has been saved by local sports clubs as a result of the initiative. Although, initially, take up of the scheme was slow it continues to grow year on year as more and more clubs realise the benefits open to them.

Despite this win for sport however, the Licensing Act 2004 looked set to threaten the finances of small sports clubs and community groups as it increased the cost of running a bar, a function which generates vital revenue for many small sports clubs. However, in its spring 2005 Manifesto, Labour made a concession to the sports lobby by committing to look again at the licensing laws to ensure they don't impact too heavily on local community groups, including sports clubs.

[5] Extended schools agenda
[6] Sport England volunteer research reference

The Charities Bill seeks to reform the laws governing Britain's voluntary sector by establishing for the first time a definition of what constitutes a "charitable" organisation. The Bill would force organisations to pass a two-stage "public benefit test" to qualify as a charity under the proposals. To qualify, the charity's objectives would first have to match one or more of those on a new list, which includes goals such as the advancement of amateur sports. This means it is likely that more sports organisations will be able to qualify as a charity.

Following Sir Michael Bichard's inquiry into the Soham murders, the Government are developing a post-Bichard vetting and barring scheme for people who work with young people and vulnerable adults. This is being implemented in primary legislation in the Safeguarding of Vulnerable People Bill. The DCMS are currently also consulting on the scope and implementation of the Sexual Offences Act 2003 in relation to sports coaches.

Coaching

Following the publication of the Government's Plan for Sport, a Coaching Task Force[7] was established to review the role of coaching. The Task Force report was published in July 2002 and identified a number of issues relating to the employment of coaches in England, including limited opportunities for coaches to develop coaching as a career, few active professional coaches and a lack of professional development of coaches. The Government has committed £28m over the next three years to implement its key recommendations which include measures to tackle the shortage of coaches, both professional and voluntary, and recognise coaching as a profession, with accredited qualifications and a real career-development structure. A Coaching Project Board is overseeing this process.

One of the recommendations is the Community Sports Coach scheme, currently being implemented by Sport England, which will establish 3,000 paid, qualified Community Sports Coaches working at local level to increase the number and range of coaching opportunities according to strategic and local need by 2006. Community Sports Coaches will be deployed with a core focus of work across schools, clubs and local authorities to coach and retain young people in sport.

Another key recommendation of the Coaching Task Force is the **UK Coaching Certificate** (UKCC) which is being developed by **sports coach UK** in partnership with SkillsActive. The UKCC is a five-level flexible learning system, developed to build on good practice that already exists within existing coach education structures – and ensure equivalence of qualifications across sport. The UKCC will universalise and rationalise coaching qualifications by introducing more generic skills modules, thereby encouraging more transferability of skills and increased mobility in the coaching labour market.

The Equality Standard for Sport

Launched in November 2004 the first ever equality Standard for sport was developed by a collaboration of agencies such as Sport England, CCPR, Sporting Equals, the Women's Sports Foundation and UK Sport. It is a framework for assisting sports organisations to widen access and reduce inequalities in sport and physical activity from under represented individuals, groups and communities especially women and girls, ethnic minority groups and disabled people. It is based around two broad themes (developing your organisation and developing your services) and four levels of achievement (Foundation, Preliminary, Intermediate and Advanced).

Leisure services

[7] *Coaching Task Force Final Report*, 2002

The Audit Commission carried out a consultation in the summer of 2005 which described proposals to introduce a new 'culture block' to the Comprehensive Performance Assessment (CPA). The new culture block includes Sport, Recreation and Play, with suggested performance indicators for each. Although, following the consultation, the exact format the new culture block is yet to be decided by the Audit Commission, if proposals are accepted it will have big implications for the provision of active leisure opportunities by Local Authorities, creating an incentive to provide new and better services.

In addition to the expected changes to the CPA, the professional bodies which represent the interests of those working in the recreation management field, the National Association of Sports Development (NASD), the Institute of Sport and Recreation Management (ISRM) and the Institute of Leisure and Amenity Management (ILAM) have agreed to come together to form a new, single professional body. By nature of its constituents the new body will have a cross-sector focus reflecting the needs of its members which will in the main come from sport, physical activity, leisure, play, parks and open space and fitness.

2.3.2 Government policy on sport, education and skills: Scotland

Sports Strategy – Sport 21

There is one national sport strategy for Scotland[7] that has buy-in from all organisations involved in the process of compiling it. This strategy is Sport 21 2003 – 2007. Its vision is for 60% of adult Scots to take part in sport at least once a week by 2020. It also has 11 targets that range from young people's participation in physical activity to provision of facilities and engagement with local authorities' community planning processes.

Sport 21's Target 10 is "To sustain 150,000 volunteers in their contribution to the development and delivery of Scottish sport".

This figure underlines the fact that volunteers in sport outnumber paid employees by at least 3:1. A focus of the work of the Implementation Group, of which SkillsActive was a member, was to address the specific skills training needs of the voluntary workforce.

SkillsActive in Scotland and sportscotland are also investigating a workforce development plan for the Sport 21 workforce and are funding consultants to investigate the size and skills needs of the Sport 21 Workforce, in preparation for this. The Sport 21 Human Resources Working Group will be producing a costed action plan to be presented to the Sport 21 National Implementation Forum meeting in October 2005, which is chaired by the Scottish Executive's Minister of Tourism, Culture and Sport (Patricia Ferguson MSP).

Physical Activity Strategy – Let's Make Scotland More Active

There has long been a concern about poor diet, obesity and lack of physical activity among Scots of all ages. The Scottish Executive established a Physical Activity Task Force and its final report is the Physical Activity Strategy "Let's Make Scotland More Active". This has a number of recommendations but its overarching aim is to encourage inactive people to become active.

In Scotland, only 34% of the population are aware of how much physical activity is needed for good health. The Scottish Executive aims to increase and maintain the proportion of physically active people in Scotland. The Scottish Executive has set a target to achieve 50% of adults aged over 16 and 80% of all children aged 16 and under who meet the minimum recommended

[8] Sport 21 National Implementation Forum (Mar 2003), Sport 21 2003 – 2007: The National Strategy for Sport – Shaping Scotland's Future

levels of physical activity by 2022. Its vision is that people in Scotland should enjoy the benefits of having a physically active life.

Scottish Ministers, the Scottish Executive and its agencies are taking the lead role in developing policies and identifying resources to support the development of four strategic objectives.

These objectives are:

- To develop and maintain long lasting, high quality physical environment to support inactive people to become active.
- To provide accurate and evidence-based advice to staff who are involved in government policy and service delivery and who work in the voluntary and private sectors.
- To raise awareness and develop knowledge and understanding about the benefits of physical activity and provide access to information
- To carry out research, monitoring and evaluation.

With representatives from the Scottish Executive, NHS Health Scotland and three regional health boards, SkillsActive recently co-ordinated work on a project that articulates with both the Scottish Physical Activity strategy and also the work that NHS Health Scotland is doing on developing a Workforce Development Plan to complement the Strategy. The project aimed at improving the skills of those people who work with inactive populations. This entailed setting up a group of professionals with technical expertise in this field to look at existing National Occupational Standards that might be adapted, or to design new NOS that might be needed.

2.3.3 Government policy on sport, education and skills: Wales

The Sports Policy Unit, led by Arthur Emyr, is located in the Directorate for Culture, Welsh Language and Sport within the Assembly Government. Its primary purpose is to support the Minister Alun Pugh and the Government in the development, formulation and delivery of sport and physical activity policy in Wales. Specific roles include sponsorship of the Sports Council for Wales and delivering the Assembly Government's Free Swimming schemes in partnership with local government. In addition, the Unit deals with those policy issues that cross national boundaries within the United Kingdom and are addressed by Ministers representing Wales, Scotland, Northern Ireland and England in a bi-annual Sports Cabinet chaired by the Secretary of State at the Department of Culture, Media and Sport (DCMS).

Climbing Higher is the Welsh Assembly Government's long-term strategy for sport and physical activity, setting out its strategic direction in Wales for the next twenty years. It was published in January 2005 after a period of public consultation that included a Sports Summit in January 2004. The essence of the strategy is to maximise the contribution that sport and physical activity can make to the well being of Wales across its many dimensions. Crucially, the strategy should be a guide to action for Government at national and local level, in other public, private and voluntary organisations and for the legions of individuals across Wales who contribute to this agenda.

Sports Policy Unit is responsible for the Welsh Assembly Government's Free Swimming initiative – Wales' largest health intervention scheme. In summer 2003, the Welsh Assembly Government, in partnership with the Welsh Local Government Association, local authorities in Wales, the Sports Council for Wales, the Welsh Amateur Swimming Association and the Federation of Disability Sports Wales delivered a national Free Swimming pilot, the first scheme of its kind in Europe.

The Free Swimming pilot had a phenomenal impact on the number of recorded junior swims during the 2003 summer holidays and the initiative's main strength was its impact on the social inclusion agenda. The biggest increase in the number of swims, at an average of 101%, was seen in Communities First areas.

The Healthy and Active lifestyles in Wales: a framework for action highlights the fact that physical activity levels are low in Wales, particularly among adults. Within this Welsh Assembly Government publication it is reported that less than a third of adults in Wales meet the recommended level of 30 minutes of moderate intensity activity at least 5 times per week. Therefore, the underpinning action plan aims to encourage positive changes with the emphasis upon encouraging the most sedentary groups of society to become active, as it is here where the greatest health benefits can be achieved.

A Strategy produced by the Welsh Tourist Board (WTB) entitled Sports Tourism in Wales: a framework for action aims to provide a framework for action by the WTB and partner organisations to maximise the social and economic benefits of sport related tourism in Wales. Here, the role of the WTB will be as an enabling organisation, as it will provide, where appropriate, business advice, capital grant assistance and marketing support and will lead the implementation of a suit of activity product development plans.

Within the Welsh Assembly Government document entitled Creative Futures: A Culture Strategy for Wales it is suggested that sport is an inseparable part of any countries cultural identity and a vital element in promoting health, individual fulfilment and social interaction. It is suggested that sport provides the opportunity to bring people together; it is inclusive and can provide accessibility to all sections of the community.

2.3.4 Government policy on sport, education and skills: Northern Ireland

Sports Council for Northern Ireland
The Sports Council provides assistance, including financial, to governing bodies of sport and has a statutory responsibility for distributing funds generated by the National Lottery.

Investing in Sport Programme: The Investing in Sport Programme has three funding streams: Competitive Opportunities, Skilling People and Employment, all of which are designed to redress problems holding back the development of sport.

Competitive Opportunities: The Competitive Opportunities programme seeks to assist organisations to prepare and send underage performers to competitive events at a range of levels. This challenge fund is accessible to a range of voluntary and statutory organisations.

Skilling People: This programme aims to provide support to organisations who are involved in the identification, recruitment, training, development and management of people working in sport by providing financial resources that will assist in running a wide range of training and education programmes.

Employment Programme: A Sports Council for Northern Ireland investment programme designed to create, develop and manage employment opportunities that enhance the development of sport in Northern Ireland.

Skills for Sport: This programme aims to create, develop and manage projects to enhance the development of Sport in Northern Ireland.

Regional Developments Squads: This programme is designed to offer quality coaching to talented young people through Education and Library area or county-based squads.

Strategy for the development of sport in Northern Ireland 1997-2005

A key feature of the strategy is: "A culture of continuous training and education for volunteers and professionals".

The Sports Council for Northern Ireland remains committed to fulfil three main policy objectives:
- to increase committed participation in sport, especially among young people;
- to improve sporting performance and,
- to improve the management of sport and the image of Northern Ireland using sport.

The Northern Ireland Physical Activity Strategy
The overall aim of this strategy is to increase levels of health related physical activity particularly among those who exercise least. SkillsActive Northern Ireland hopes to contribute towards targets to reduce the sedentary population and address our growing obesity levels though its work in developing a skilled Health and Fitness workforce.

2.4 Partner organizations and external initiatives

There are two membership bodies for sport and recreation professionals: the Institute of Leisure and Amenity Management (ILAM) and the Institute of Sport and Recreation Management (ISRM).

Institute of Sport and Recreation Management (ISRM)
The Institute [‡] exists to advance and promote public health for the benefit of the public in particular through the provision of education, training and advancing medical and other sciences and technologies and by encouraging active participation in sport and other recreational activities.

ISRM promotes for the public benefit the provision of facilities for Recreation or other leisure time occupation in the interest of health and social welfare and to provide opportunities to encourage participation in sport and other recreational activities.

Sport England
Sport England [†] operates under a Royal Charter and is the Government funded agency responsible for providing the strategic lead for sport in England in order to deliver the Government's sporting objectives. It receives an annual grant in aid from the Department for core expenditure and also in respect of specific programmes. It is also a distributor of the Lottery Sports Fund. Its vision is to make England an active and successful sporting nation and its business objectives are:

- increase participation in sport to improve the health of the nation, with a focus on priority groups;
- retain people in sport and active recreation through an effective network of clubs, sports facilities, coaches, volunteers and competitive opportunities; and
- promoting sporting success at the highest level.

[‡] www.isrm.co.uk
[†] www.sportengland.org/

Lord Carter: Review of national sport effort & resources

Labour's sports reforms take the shape of a National Sports Foundation, based on the Football Foundation model, to deliver resources from the private and voluntary sectors, together with public money, to invest in grassroots sports. This has come out of the Carter review[9] which identifies five key areas to inform the priorities of the sports sector, these are:

1. To introduce robust measurement and monitoring systems that inform Government investment at local level and ensure clear lines of accountability.
2. To promote the personal benefits of sport and physical activity and to help people identify their local delivery points
3. To improve the local delivery of sport and suggest the Government considers how it can support the co-ordination of public, private and voluntary sector investment – as well as LAs and regional bodies – in order to improve local sporting facilities
4. To create, under strong Government leadership, a single access point and brand for sport in England and to streamline duplicating 'back office' functions that would release more money for front line activity
5. To provide targeted incentives and commercial assistance – via a new National Sports Foundation (NSF) – to encourage individual and corporate support and to 'help sport help itself'.

UK Sport

UK Sport [Π] operates under a Royal Charter and is responsible for creating a strategy for the development of high performance sport in the UK. Its main purposes are to support world class athletes, world class events and ethically fair and drug free sport. Its overriding aim is for the UK to be in the top five sporting nations by 2012, measured by athlete performances at World Championships, Olympic and Paralympic Games.

UK Sport is also a Lottery Sports Fund distributor through its World Class Performance and World Class Events programmes. It also receives Exchequer funding used to help improve the administration of UK governing bodies of sport, manage the UK's anti-doping programme and run the UK Sports Institute.

British Olympic Association

The British Olympic Association (BOA) is responsible for the Olympic Movement in Great Britain. They arrange for the Great Britain Olympic team to participate in the Summer and Winter Olympics. The BOA receives no funding from Government.

The BOA [Ω] is organised into a number of Units:
The Performance Unit provides a co-ordinated approach to the preparations for the Summer and Winter Olympics. This work includes sports science and medicine support and research, access to training camps and warm weather training, team management training and athlete support services. The Games Services Department is responsible for the planning and execution of the Great Britain Olympic Team participation in the Olympics. This involves the overall organisation and administration of the Olympic team's logistics including accommodation, clothing and finance. The Marketing Department covers corporate sponsorship, licensed merchandise, the British Olympic Appeal, Legal Protection for Team GB

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[9] *Review of National Sport Effort and Resources*, Patrick Carter, March 2005
[Π] www.uksport.gov.uk/
[Ω] www.boa.org.uk
www.london2012.org

and the Team GB Brand. There is also a BOA Legal Department. The City of London is bidding to be the host city for the 2012 Olympic Games.

United Kingdom Sports Institute (UKSI)
The UKSI helps the country's top sportsmen and women to win medals in major tournaments like the Olympics and the World Athletics Championships. It provides much needed world class facilities and a higher standard of co-ordinated support services than the UK has ever had before.

The Institute is made up of four Home Country Sports Institutes in England, Scotland, Wales and Northern Ireland, and supported by the Performance Directorate of UK Sport on areas such as coaching, sports science, technology and innovation. Developments in these areas will be integrated into the Institute network as the benefits which improve athletes' performance are identified.

sportscoach UK
sportscoach UK [**] is dedicated to guiding the development and implementation of a coaching system, recognised as a world leader, for all coaches at every level in the UK. To achieve this sportscoach UK works with its partners to ensure:

- professional and ethical values and inclusive and equitable practice
- agreed national standards of competence as a benchmark at all levels
- a regulated and licensed structure
- recognition, value and appropriate funding and reward
- a culture and structure of innovation, constant renewal and continuous professional development.

Central Council for Physical Recreation (CCPR)
The CCPR [¥] is the independent voice for UK Sport and the voluntary sports sector. As the umbrella organisation for the national governing and representative bodies of sport and recreation, CCPR represents a diverse membership that includes well known organisations such as the Football Association and other smaller, less well known bodies such as the Medau Society. CCPR also represents many organisations that enjoy a supporting role in sport and recreation, such as teaching unions, youth groups, recreational management and HM Armed Services.

As the voice of the voluntary sport and recreation sector, CCPR's work is aimed at promoting and protecting the interests of sport and recreation and to support the organisations involved in their provision and administration. In addition to providing a central focus for its member organisations, where they can obtain advice and information, CCPR is also an effective lobbying organisation; representing the views and needs of our members to all authorities who impact on sport and recreation. The independent status of CCPR enables it to work effectively with Government and to ensure a healthy dialogue between sport and policy formers.

CCPR has a wide policy remit, which is increasing dramatically as sport and recreation rises up the political agenda. Amongst the many issues concerning CCPR is the desire to increase the provision of education and training within the sport and recreation sector.

[**] www.sportscoachuk.org
[¥] www.ccpr.org.uk

National Governing Bodies of Sport
Each sport in the UK has a National Governing Body (NGB). National Governing Bodies and sports are recognised and approved by Sport England. NGBs are responsible for the organisation and promotion of sports. Often NGBs are the main provider of qualifications and training in their sport for both coaching and officiating.

2.5 London 2012 Olympic and Paralympic Games

London has recently been awarded the Olympic and Paralympic Games in 2012. The recent success of the bid exemplifies the UK's ambitions to become a top sporting nation with a commitment to developing the facilities and infrastructure associated with hosting the "most successful Olympic Games ever".

A public body is currently being established to deliver the commitments made by the Government as part of London's bid to host the 2012 Olympic and Paralympic Games. Along with facilities, investment also needs to be made in the people who will run the facilities and work at the games. London 2012 has already estimated that 70,000 volunteers will be needed to run an Olympics.

The staging of the games provides an opportunity to demonstrate the importance of sport and physical activity to improving health. It will also be an opportunity to increase the usage of existing and new facilities built for the Games across our communities.

The Government, working with the NHS, British Olympic Association, Greater London Authority and London 2012 Ltd, will make clear the beneficial effects for Londoners, and the rest of the country, of increased physical activity.

Olympic Bill
An Olympic Bill was introduced to Parliament to establish a public body to run the Olympics. The Bill gives effect to the commitments made by the Government as part of London's bid to host the 2012 Olympic and Paralympic Games. It provides for the statutory remit of the public bodies which will be tasked with delivering the Games. In particular, it sets up the Olympic Delivery Authority to deliver public sector obligations for the Games, principally the necessary venues and infrastructure. The Bill also provides the legislative framework needed to enable the UK to fulfil the requirements which the International Olympic Committee place on host cities.

Olympic Lottery
The National Lottery will contribute to the public sector funding package for the Games. Of the Lottery contribution to the cost of the Games, Camelot plans to raise £750 million through hypothecated Olympic Lottery games. A further £340 million would come from expenditure by the established Lottery sport distributors. The remaining contribution could be derived by changing the shares of Lottery income passing to existing good causes beyond 2009.

Lottery
According to the DCMS website, the Government is investing £2 billion public and lottery money in sport by 2006. Labour's manifesto highlights the importance of public involvement in lottery funding decision making and will launch a new, national consultation on the way Lottery money is spent after the new licence is given in 2009.

Following the successful bid, London 2012 will be wound up and replaced by the following:

- **Olympic Board** – this will provide oversight, strategic coordination and monitoring of the total Olympic Games project. It will comprise the Secretary of State responsible for the Olympics, the Mayor of London, the Chair of the British Olympic Association and the Chair of the London Organising Committee (LOCOG) once formed.

- **LOCOG** (London Organising Committee of the Olympic Games) – will have the primary responsibility for staging the Games and will act as the client on behalf of the International Olympic Committee (IOC). The LOCOG will be mostly self financing through sponsorship and revenues from IOC broadcasting and sponsorship deals. It has therefore been established as a company limited by guarantee and jointly owned by the Olympic Stakeholders: the Government; the Mayor; and the British Olympic Association.

- **Olympic Delivery Authority** (including the Olympic Transport Authority) – this will be an Executive Non-Departmental Public Body responsible for co-ordinating public sector obligations set out in the candidature file for staging the Olympic and Paralympic Games and ensuring the delivery of the venues.

- **Olympic Lottery Distributor** (OLD) – the *Horse Racing Betting and Olympic Lottery Act 2004* makes allowance for the establishment of an OLD to distribute Lottery monies for staging the games.

SkillsActive role to date

SkillsActive ideally placed to advise LOCOG, the ODA, RDAs and the LSC with regards to all skills issues for the London Olympic and Paralympic Games and has undertaken a range of roles and work including active membership of:

- **2012 Volunteer Strategy Group**. The purpose of the group is to determine the strategy for providing 70,000 volunteers to support the Games. The aim of the strategy is to ensure that all volunteers have the skills required to deliver a variety of tasks to ensure the success of the Games. The strategy will focus on the following key themes of engagement, enhancement, empowerment, enjoyment and equality of opportunity. Supporting these key themes the strategy will address community engagement, pre volunteer training, recruitment, training, rights and responsibilities and the legacy for volunteering across the UK. A formal consultation on the strategy will take place in October 2005 leading to the development of an action plan in January 2006.

SkillsActive has also worked closely with Sport England to inform the initial work regarding pre volunteers, training and skills and to produce documents for the 2012 bid. We have contributed to the Fit 4 2012 Sport England document, which highlighted 5 key areas: skills, clubs, health and well being, access and talent.

- **The London Development Agency (LDA)** intends to establish an intelligence unit which will undertake detailed research into the skills required for the Games from 2005 to 2006. SkillsActive will work closely with the unit to ensure all the skills for both the paid and volunteer workforce are identified and that that the relevant training is made available to them.

- Since the announcement the RDAs now recognise that sport has moved up the economic agenda and the role SkillsActive has in developing the workforce for the Olympic and Paralympic Games.

SkillsActive will Chair a consortia of Sector Skills Councils who will work closely with LOCOG to deliver the London Olympic and Paralympic Games.

2.6 Structure of the report

The document has six key component parts, which are:

- **sector and workforce definitions,** which is an overview of the sector, its size and geographical location;
- **current skill needs, skill shortages and gaps**, which examines the extent of skills shortages and skill gaps across the sector ;
- **key drivers of business competitiveness**, which examines the impact of external drivers of change, the competitive position of the sector, the current performance of the sector, an analysis of productivity drivers, sector strategies for success and competitive advantage, international benchmarking and sports participation and employment;
- **implications for skills demand**, including a discussion of the character and composition of current skill needs and future skills needs;
- **sector perspectives**, which include a separate summary of skill needs for each sub-sector (where applicable) and an identification of any distinctive skill needs by area; and
- **priorities**, a discussion of key strategic issues to be addressed in the short, medium and longer term in order to enhance sector competitiveness and priorities at sub-national levels.

3. SECTOR SKILLS AGREEMENT COVERAGE

3.1 Definition of Sport

In this report, the definition of sport provided by the Council of Europe is used: "Sport embraces much more than traditional team games and competition. Sport means all forms of physical activity which, through casual or organised participation, aim at expressing or improving physical fitness and mental wellbeing, forming social relationships or continuing results in competition at all levels"

3.2 Definition of Sport & Recreation sector

It is normal to define sectors in terms of Standard Industrial Classification (SIC) codes, particularly for the purpose of drawing down data from national data sources. Generally, SkillsActive has problems with being able to link its sectors to SIC codes and therefore has difficulty in being able to use research based on SIC codes to define the whole sector. All five SkillsActive sub sectors can be defined by proportions of four figure SIC codes and sit across several, making the use of SIC codes to identify the size of the sectors difficult.

Our predecessor organisation, SPRITO (the National Training Organisation) commissioned IDBR to undertake an analysis of the SkillsActive sector in 1997, prior to the introduction of tighter regulations under the Data Protection Act 1998. This examination allowed the exploration of five and six digit SIC codes and helped to identify the proportions of four digit SIC codes which have been used to historically define the five sub sectors.

As part of the SSA process, SkillsActive worked with Experian to further develop this footprint and fine tune SkillsActive and its constituent sectors to proportions at the four digit SIC level. These are detailed in Table1 and were derived by identifying the proportion of employers that fall under SkillsActive's remit by SIC code from Experian's National Business Database. A further search for key occupations in the sector was performed using a SIC/Standard Occupational Classification (SOC) matrix. The SIC code shares used here are held constant in the forecast period.

The Sport and Recreation sector definition used in this report is detailed in Table 1. Sport and Recreation is largely defined by 92.61 and 92.62, but this is not the whole picture:

Table 3.2 a): Definition of the Sport and Recreation sector

	SIC Code	SIC Description	Share of SIC code
Sport and Recreation	9261	Operation of sports arenas and stadia	100%
	9262	Other sporting activities	89%
	9133	Activities of other membership organisations	17%
	9272	Other recreational activities n.e.c.	26%
	9304	Physical well-being activities	1%
	0142	Animal husbandry service activities (exc. veterinary activities)	9%
	8021	General Secondary Education	4%

Table3.2 b): Occupations used in SIC / SOC Matrix

SOC Code	SOC Description
1225	Leisure and sports managers
3441	Sports players
3442	Sports coaches, instructors & officials
3443	Fitness instructors
3449	Sports and fitness occupations n.e.c.
6123	Playgroup leaders & assistants
6211	Sports and leisure assistants

The Annual Business Inquiry surveys 78,000 workplaces in the UK to measure employee jobs and financial information on organisations based on Standard Industrial Classifications (SIC codes). The Labour Force Survey is a household survey covering 120,000 people which measures employment, workforce jobs, vacancies, earnings and hours worked. In addition to classifying organisations by SIC code, it uses Standard Occupational Classifications (SOC codes) to identify the nature of jobs.

Working Futures

The *New Projections of Occupational Employment by Sector and Region* has been prepared for the SSDA and its partners by IER. The project provides a series of worksheets containing past and forecast future employment levels for each SSC from 1981 to 2012 inclusive, disaggregated by employment status (full-time (FT), part-time (PT) and self-employment (SE)) and gender (male, female).

The results for SkillsActive have been derived using four SIC codes (5522 Camping sites including caravan sites, 9233 Fair and amusement park activities, 9261 Operation of sports arenas and stadiums, 9262 Other sporting activities). Unfortunately the finest level of detail for Output, Employment and Productivity indicators from the Working Futures project is at two digit SIC code. The most relevant code for the sector is 92 Culture and Sport. This report will draw on forecasting work for the Active Leisure and learning produced by Experian Business Strategies.

National Employer Skills Survey

Other surveys which are generally applicable to Sector Skills Council research include the LSC's National Employer Skills Survey in England. This telephone survey interviews organisations with at least one employee, and the sampling by sector is based on whole (100%) SIC codes only. This particular survey does not capture any self-employment or voluntary work, both of which are important to SkillsActive.

Most importantly the sampling does not use proportions of SIC codes but the SkillsActive sector sample is largely based on organisations in Sport and Recreation (SIC 92.6), and this is a good match for the Sport and recreation sub-sector.

Because of the difficulties with using official government statistics that are compatible with the sector, the data in this Skills Needs Assessment has drawn on the following sources of information:

- SSA Visioning Workshops with the Sport Sector 2005
- The Future of Active Leisure and Learning: Sport and Recreation UK, Experian Business Strategies 2005
- SkillsActive Sport, Fitness and Outdoors Employment and Skills Survey 2005
- Review of National Sport Effort and Resources, Patrick Carter, March 2005
- Sports Coaching in the UK, MORI 2004

3.3 Size and structure of sector

There are two ways to measure the size of the sector, which is by using either the value of output or by looking at the numbers employed. We look at both of these aspects below:

3.3.1 Output

Estimates by Experian[10] suggest that Sport and Recreation is the largest sector within Active Leisure and Learning in the UK.[Ω] With a gross value added output of just over £5 billion in 2004, it created 61 per cent of total Active Leisure and Learning output.

The Sport and Recreation industries created 0.6 per cent of whole UK economy output in 2004.

Table 3.3.1: Output* in Sport and Recreation in the UK, 2004

	Total (£millions)	Share of Total Active Leisure and Learning	Share of Whole Economy
Active Leisure and Learning	8,590	-	0.9%
Sport and Recreation	5,200	60.6%	0.6%
Whole Economy	922,060	-	-

**Measured as Gross Value Added (the net value of output or the value of income earned by individuals and corporations).*

Source: Experian, August 2005; based on data sourced from National Statistics

3.3.2 Employment

Sport and Recreation employed 363,000 people in 2004, 63 per cent of total Active Leisure and Learning employment. This contributed 1.2 per cent to the total UK employment figure.

Table 3.3.2: Employment in Sport and Recreation in the UK, 2004

	Total	Share of Total Active Leisure and Learning	Share of Whole Economy
Active Leisure and Learning	575,990	-	1.9%
Sport and Recreation	363,110	63.0%	1.2%
Whole Economy	30,134,250	-	-

Source: Experian, August 2005; based on data sourced from National Statistics

[10] The Future of Active Leisure and Learning: Sport and Recreation UK, Experian Business Strategies, 2005

[Ω] There is some overlap between Sport and Recreation and the Outdoors, where sports are common to both sectors, or which overlap with Health and Fitness. This may slightly overstate the dominance of Sport and Recreation in Active Leisure and Learning.

3.4 Profile of workforce

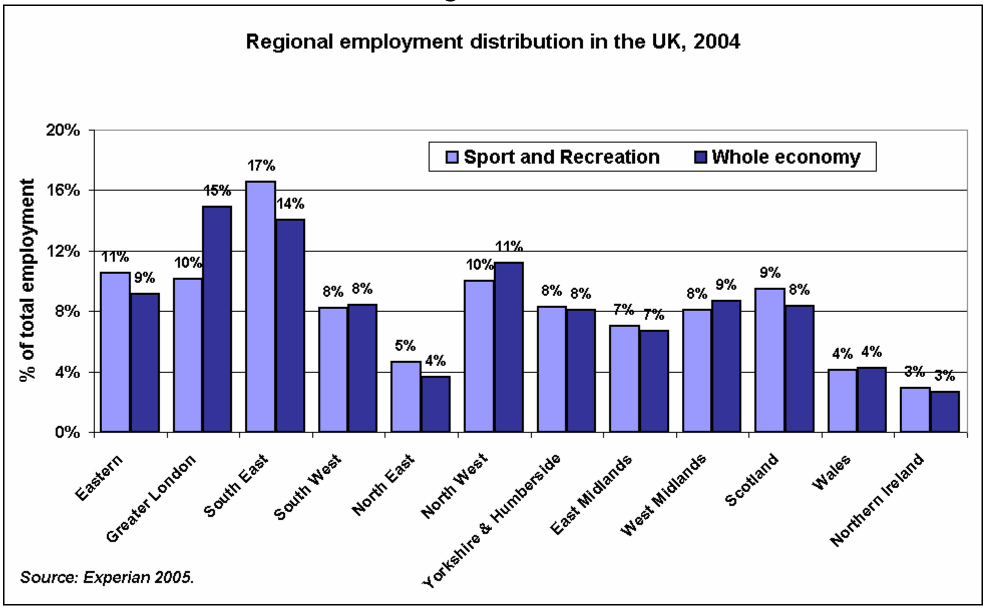
3.4.1 Regional Profile

The Sport and Recreation workforce is particularly concentrated in the South East of England, with over 60,000 Sport and Recreation workers based there (17 per cent of the total). Sport and Recreation employment is more concentrated within the South East than is the case for the whole UK workforce.

Eastern England, Greater London, North West England and Scotland are also big employers of Sport and Recreation workers, although the concentration of Sport and Recreation workers in Greater London is noticeably less than the concentration of the whole UK workforce in the region (10 per cent and 15 per cent respectively).

Wales and Northern Ireland employ the smallest proportion of the Sport and Recreation workforce, accounting for 25,500 workers in total.

Figure 3.4.1

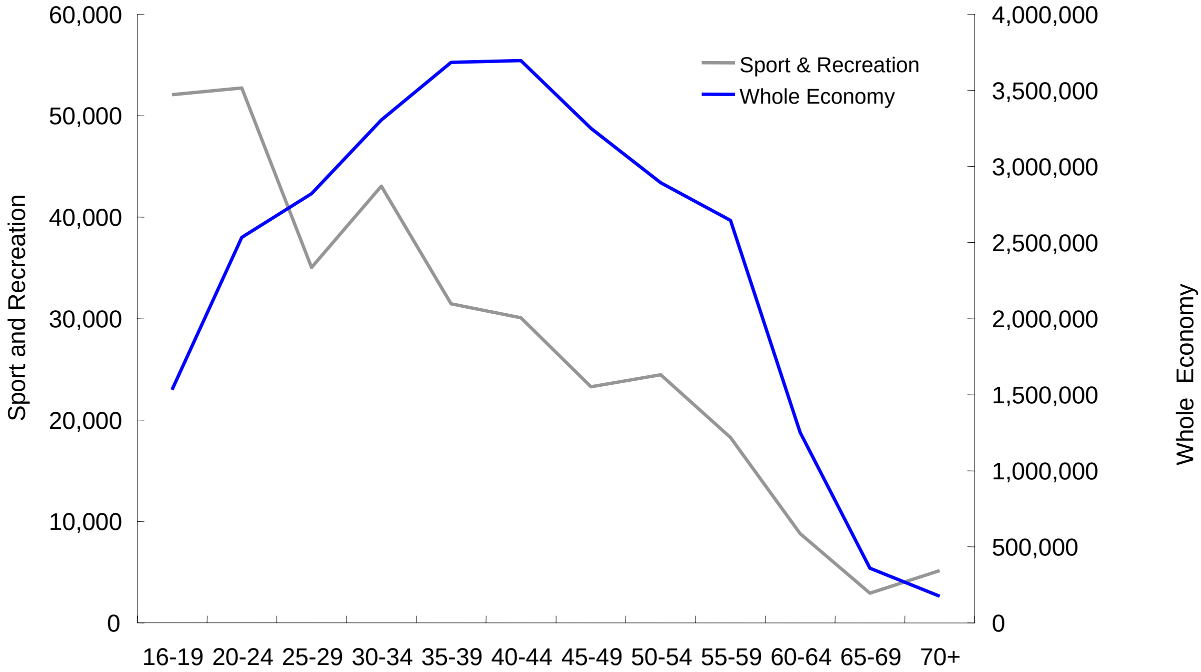


3.4.2 Gender and age

Sport and Recreation employs more females than males, and a higher proportion of females than the economy as a whole, with the 2004 ratio 54 female: 46 male.

The sector has a more youthful age profile than the whole economy. Generally the sector loses employees as they age as shown in the clear downward trend of employees in Figure 3.4.3. This turnover if continued has clear consequences if skills and experience in the sector gained are not retained. The youthful age profile is a factor behind why retirement isn't as big an issue for the sector; people simply aren't staying in the sector long enough for it to be relevant.

Figure 3.4.2: Age Profile

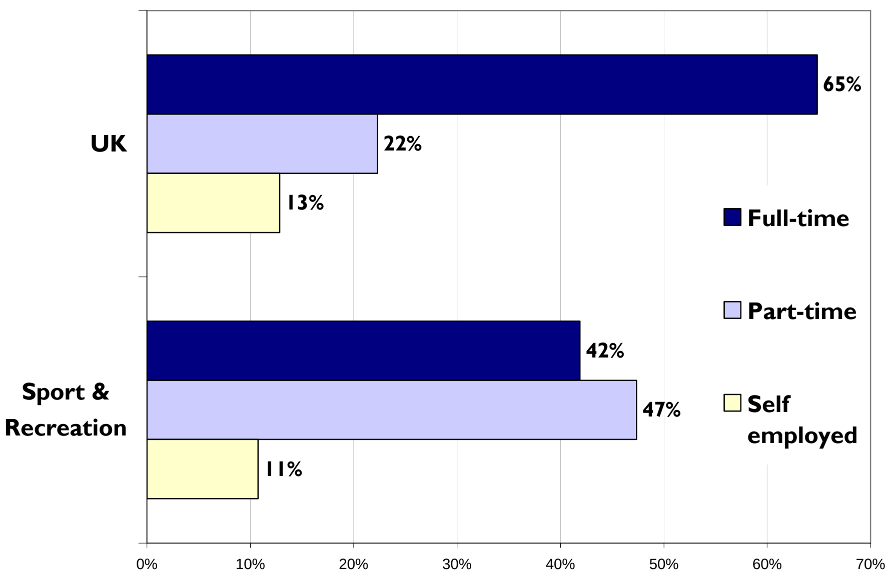


Source: SkillsActive derived from LFS Autumn 2004

3.4.3 Employment status

89 per cent of people working in Sport and Recreation are employed, with the remaining 11 per cent working on a self-employed basis. Crucially, a higher proportion of workers are employed on part time basis (47 per cent) rather than full time (42 per cent). This is dramatically different to the UK as a whole where 65% of workers are employed full time. As a percentage of employed workers (excluding self employment), the ratio for Sport and Recreation is 47 full time: 53 part time, which is dramatically different to the whole UK at 74 full time: 26 part time.

Figure 3.4.3 Employment status



3.4.4 Ethnicity

Sport and Recreation is underrepresented in terms of employing ethnic minorities due to the lack of Asians and Asian British working in the sector. The sector is comprised of 95.3% white compared to 93% in the whole economy.

Table 3.4.3: Ethnic Profile for Sport and Recreation

	Sport & Recreation	Whole Economy
White	95.3%	93.0%
Mixed	1.1%	0.6%
Asian or Asian British	0.9%	3.4%
Black or Black British	1.7%	1.8%
Chinese	0.2%	0.3%
Other ethnic group	0.7%	0.8%

Source: SkillsActive derived from LFS Autumn 2004

3.4.5 Occupations

The percentage of total employment by occupation, and which highlight the ten most significant occupations (indented), is shown in Table 3.4.4.

- Associate Professional and Technical occupations is the largest occupation group within Sport and Recreation, representing 20 per cent of the total workforce. Within this occupation are those employed in sports and fitness occupations.
- Also, when compared to the whole economy, other over-represented occupations are Managers and Proprietors in Hospitality and Leisure Services, Agricultural Trades (including grounds men), Leisure and Travel Service occupations and Elementary Personal Services occupations.
- In contrast, Professional occupations and Sales and Customer service occupations are also under-represented when compared with the UK workforce.

Table 3.4.4 Occupational profile of the UK Sport and Recreation Sector workforce, 2004

(% of total employment)		
	Sport and Recreation Sector	Whole economy
Managers and Senior Officials	17%	15%
Managers and Proprietors in Hospitality and Leisure Services	10%	2%
Professional Occ.	7%	11%
Teaching Professionals	4%	4%
Associate Professional and Technical Occ.	20%	13%
Sports and Fitness Occ.	14%	0%
Administrative and Secretarial Occ.	12%	14%
General Administrative Occ.	3%	2%
Secretarial and Related Occ.	5%	4%
Skilled Trades Occ.	10%	11%
Agricultural Trades (includes grounds men)	7%	1%
Personal Service Occ.	15%	7%
Animal Care Services	3%	0%
Leisure and Travel Service Occ.	7%	1%
Sales and Customer Service Occ.	2%	8%
Process, Plant and Machine Operatives	1%	8%
Elementary Occ.	16%	12%
Elementary Personal Services Occ.	10%	4%
Elementary Cleaning Occ.	3%	3%
Weighted Base	363,113	30,134,245
Source: Experian, August 2005; based on data sourced from National Statistics		

3.4.6 Coaching

The General Household Survey (GHS) reports that 23% of the adult population (16 and over) who participated in sport had received coaching, instruction or tuition in the last 12 months in 1996, and this figure had increased to 37% by 2002 [11].

There are 1.2 million coaches in the UK according to Sports Coaching in the UK [12], conducted by MORI on behalf of sportscoach UK in 2004. 81% of these coaches (or 970,000) are volunteers. The remaining 230,000 have paid employment, but only 26% of those work on a full time basis, and these 60,000 full time paid coaches comprise just 5% of all coaches.

In terms of the Coaching profile, three quarters of coaches are men (930,000) compared to a quarter who are women (300,000). Men account for a larger proportion of full-time coaches, 80% compared to 20% of women. The proportion of women who are paid part time rises to 43% compared to 57% of men. At senior level women are also under represented, with women accounting for just 8% of GB coaches at the 2000 Sydney and 2004 Athens Olympic Games [13].

Sports Coaching in the UK estimate that just over 8 out of 10 (81%) coaches are male. Coaches have an average age of 37, with 46% aged under 34. Seven out of ten individuals who coach are in the AB or C1 social-economic classification, and the vast majority of coaches from the DE social class work on a voluntary basis.

It is also notable that individuals who coach are better qualified than the average UK citizen. Individuals who coach are much less likely to have no qualifications than the UK public (8% compared to 26%) and much more likely to have an A-level, Bachelor, Masters or PhD degree (53% compared to 31%). Indeed, 44% of coaches have either a Bachelor, Masters or PhD degree.

Despite this context, only a minority (38% or 470,000) of coaches hold the recognised qualifications of a governing body of sport. 85% of those qualified are at levels 1 and 2; a further 11% are at level 3; 3% are at level 4 and less than 1% are at level 5. There is clearly a need to enhance the number of coaches taking qualifications.

3.5 Volunteers

A key factor that can lead to an underestimation of the Active Leisure and Learning workforce is the degree of voluntary, unpaid work undertaken in the Active sector.

This is particularly relevant in Sport and Recreation, which is highly dependent on unpaid workers. In fact the SkillsActive's research[14] demonstrates that almost one in four (23%) of organisations are run purely on a voluntary basis (25% in the Sport & Recreation sub sector alone). Two out of three organisations (68%) are dependant on some voluntary contribution (72% in Sport & Recreation).

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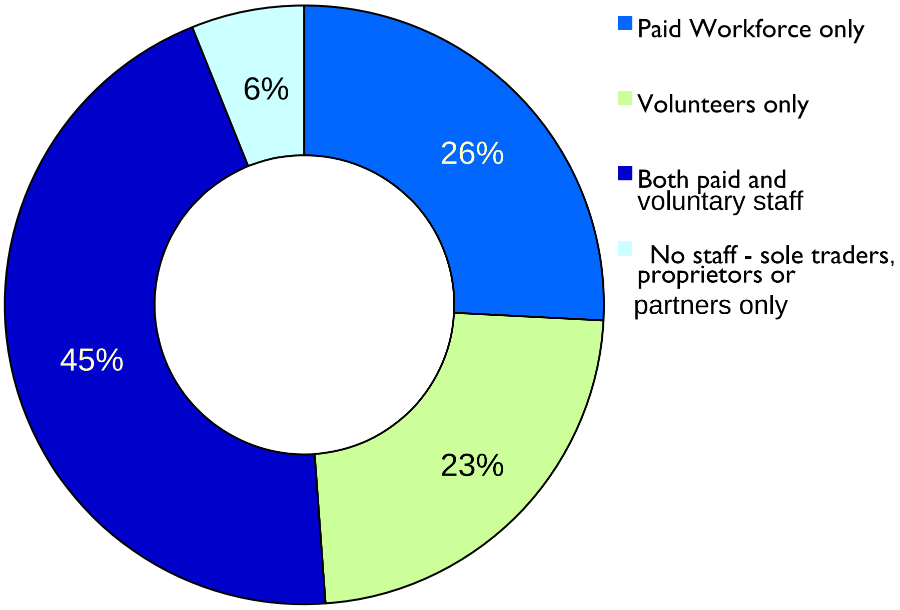
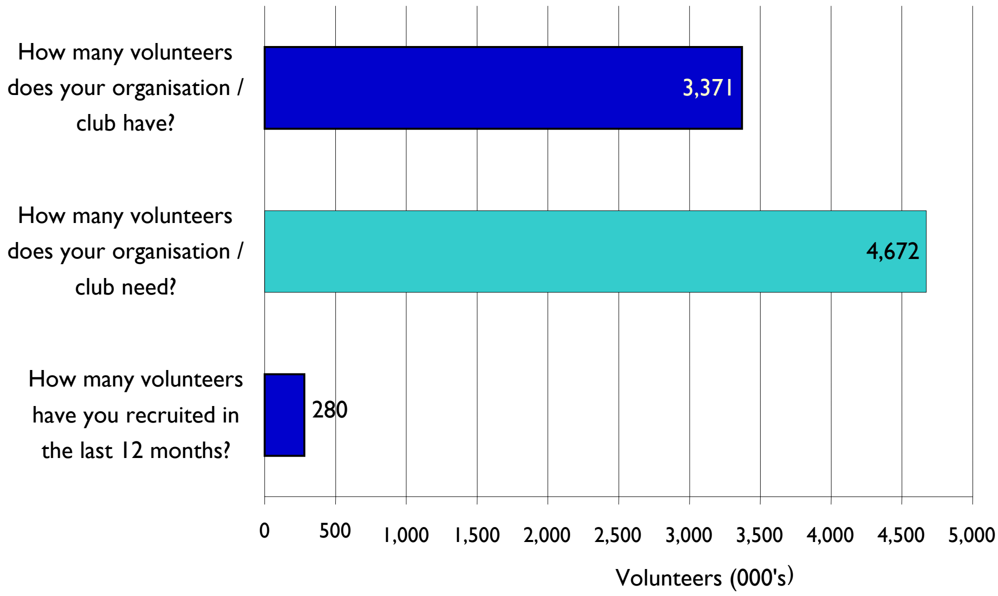
[11] Sport England and UK Sport Participation in Sport in Great Britain 1996 / Sport and Leisure – Results from the Sport and Leisure Module of the 2002 General Household Survey
[12] Sports Coaching in the UK, MORI 2004
[13] UK Strategy Framework for Women and Sport, UK Sport, Kervin A, 2004
[14] SkillsActive Sport, Fitness and Outdoors Employment and Skills Survey, 2005

Figure 3.5.1 Does your organisation employ workers on a paid or voluntary basis?



This research has extrapolated the numbers of formal individuals engaging in a voluntary capacity with the employers surveyed in Sport & Recreation, Health & Fitness and the Outdoors, see chart 3.5.3 below. Despite benefiting from the assistance of 3.4 million volunteers, sports clubs and associations would collectively require 4.7 million, leaving a gap of approx 1.3 million volunteers, which represents just 72% of the total sector requirement.

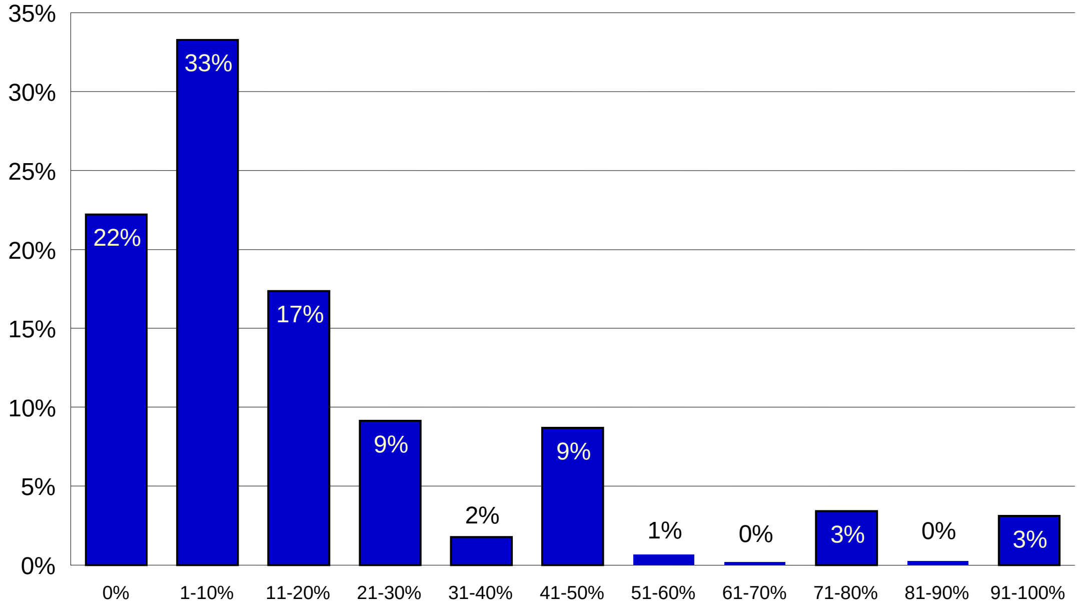
Table 3.5.2: Number of volunteers required by Sports clubs, 2005



Source: Sport, Fitness and Outdoors Employment and Skills Survey, 2005

In the last year the sector has reported recruitment of 280,000 volunteers. This has to be offset against those volunteers that are leaving the sector each year. The majority of organisations (55%) are reporting a loss of less than 10% of their volunteers each year with relatively few organisations (8%) reporting losses of over half the voluntary workforce. Using these reported percentages and the size of the workforce for each organisation, we estimate that 367,000 volunteers leave the sector each year. Obviously if this trend continues the sector is unlikely to reach the volunteer numbers needed in the future.

Figure 3.5.3 What is the average proportion of volunteers that leave and need replacing each year?



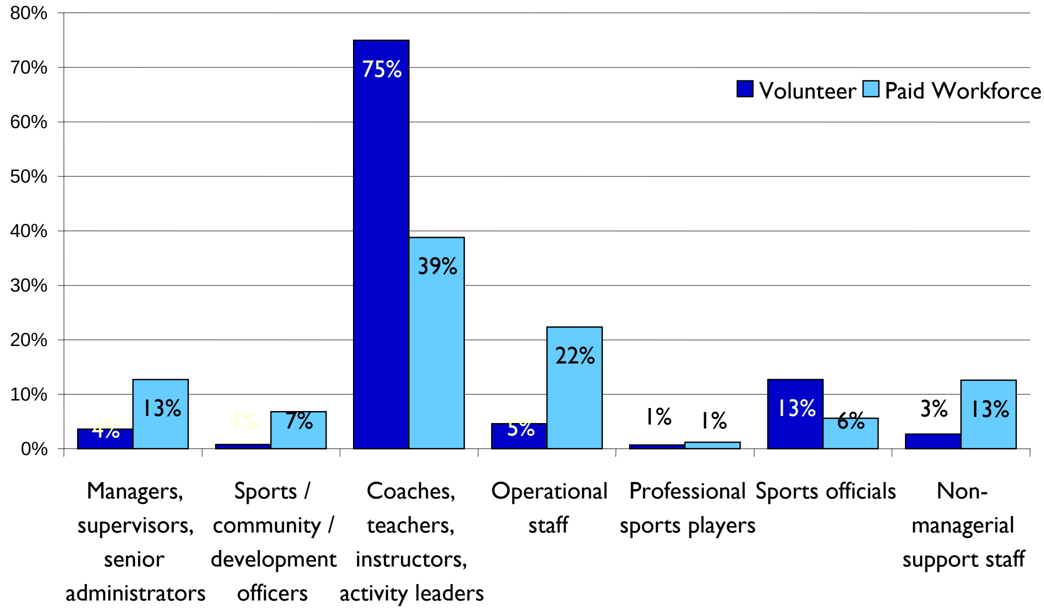
Volunteers are therefore vital in this sector. Most sports and sports clubs rely on volunteers for their operation with few paid employees. This voluntary work spans governance, coaching, officiating and marshalling. Motivating, managing and training volunteers is an on-going challenge.

At both Sports Clubs and County or Regional Federation level, sport is highly dependent on volunteers where most work is conducted by particular roles like Coaching and Officiating. SkillsActive's research [14] shows that volunteers outnumber paid workers in these key roles:

The distribution of volunteers by occupation is also noticeably different to the paid workforce. Coaches and officials comprise 88% of all volunteers compared to just 44% in the paid workforce.

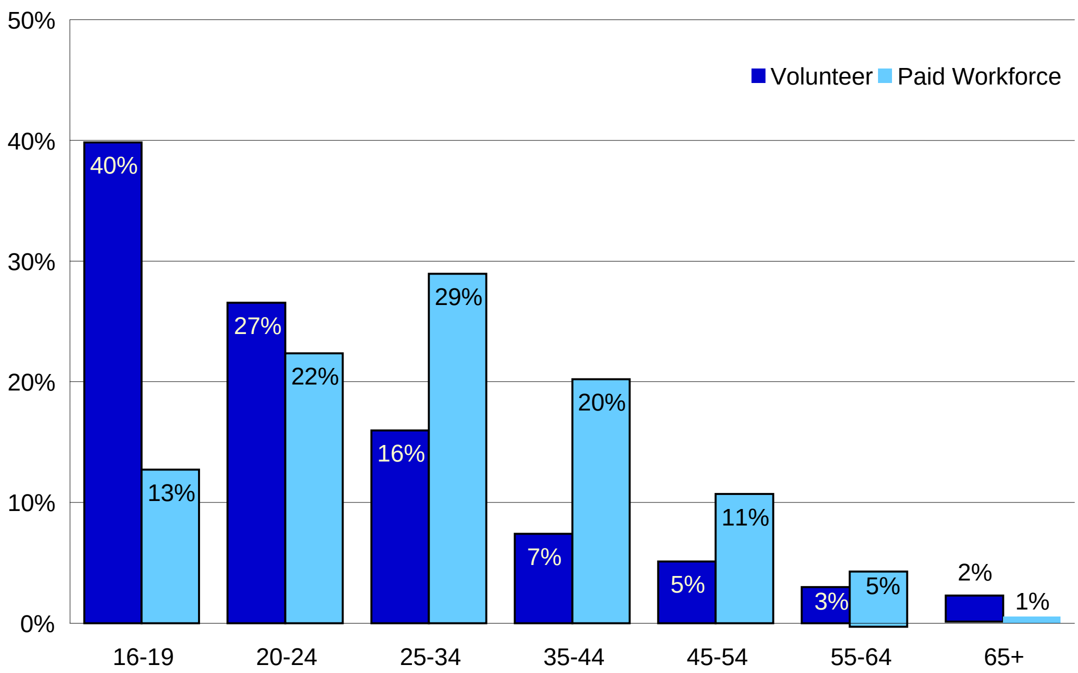
[14] *Sport, Fitness and Outdoors Employment and Skills Survey*, SkillsActive 2005

Figure 3.5.4: Occupational Profile of Volunteer and Paid Workforce



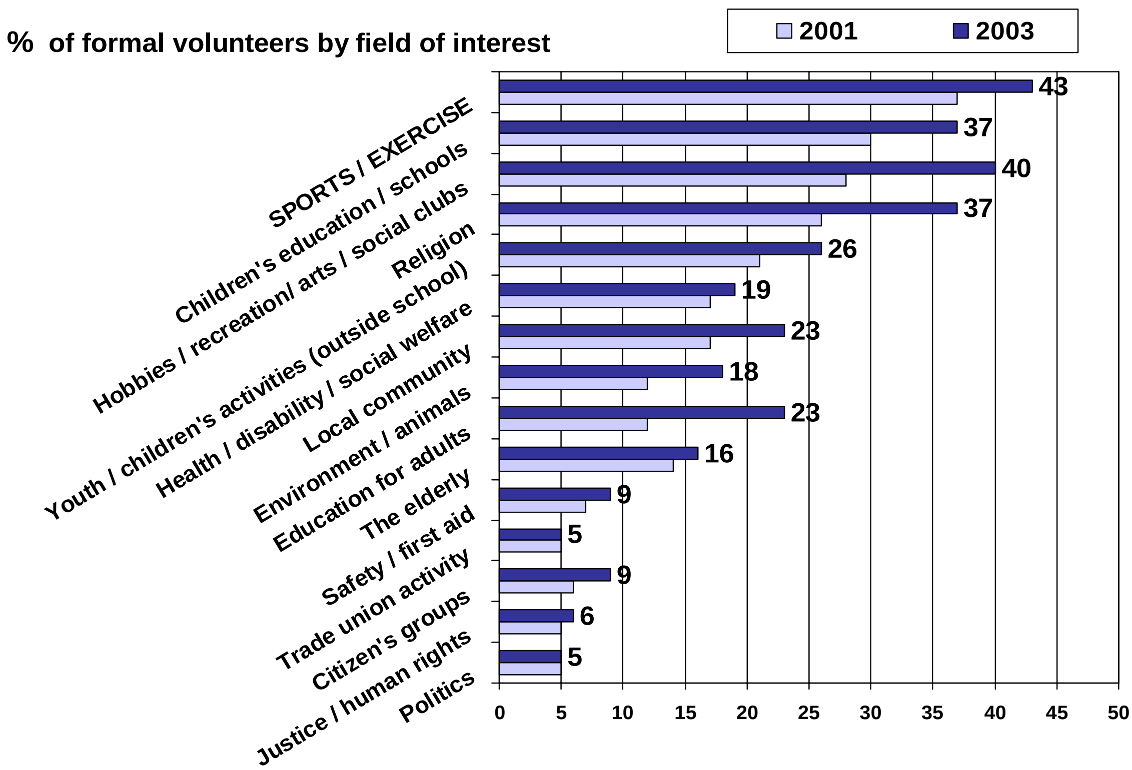
The voluntary sector has a noticeably younger age profile compared to the paid workforce with two thirds being under 25. As a consequence the share of volunteers in the older working age groups is much smaller than the paid workforce suggesting issues with volunteer retention when there are conflicts with other demands on time.

Figure 3.5.5 Age Profile: Volunteer and Paid Workforce



The Home Office Citizenship Survey[15] shows that 'Sports / exercise' continue to attract the highest level of volunteering at 43 per cent. That level has grown by 6% over the last two years.

Figure 3.5.6: Participation in Formal Volunteering, by Field of Interest, 2001 and 2003[¥]



Source: The Home Office Citizenship Survey

[15] Active Communities: Headline Findings from the 2003 Home Office Citizenship Survey, 2004
[¥] Formal volunteering is defined as: giving unpaid help through groups, clubs or organisations to benefit other people or the environment (e.g. the protection of wildlife or improvement of public open spaces)
N.B. Please note that percentages do not sum to a hundred as people may volunteer in more than one field of interest.

4. KEY DRIVERS OF BUSINESS COMPETITIVENESS

4.1 Impact of external drivers of change

4.1.1 Consumer demand

Participation is certainly one of the key consumer drivers, as well as becoming a mechanism for measuring performance in the Sport and recreation sector. Participation drivers include the development of 'physical literacy' at an early age, usually at school, promotion by sporting success in the media, medals won by sporting heroes, together with individual influences like encouragement from 'Mum' and inspirational coaching[16].

Participation in Sport and Recreation has been monitored for many years in "volume" terms by both public and private sectors. The General Household Survey (Living in Britain, National Statistics) has periodically included participation questions since the 1970s – it usefully also measures other leisure pursuits for comparisons with sport – while Target Group Index is the longest running private source. The Sports Industries Federation (TSIF) has commissioned participation surveys, both general and sport-specific, and October 2005 sees the start of the Active People survey, commissioned by Sport England, which will publish its first results from February 2006.

Overall participation in at least one sport in the four weeks before interview, increased from 61% of adults in 1987 to 65% in 1990 and remained at about this level through to 1996[≠]. Participation then declined to 59% in 2002. The pattern for participation in the twelve-month reference period was similar. Among both men and women, overall sports participation has decreased since 1996. In 1996, 71% of men had participated in at least one activity, including walking, in the four weeks before interview, compared with 65% in 2002. Similarly for women, the four-week participation rate, including walking, fell from 58% in 1996 to 53% in 2002 - from Living in Britain (National Statistics), results of the 2002 General Household Survey[11]

Participation in sports, games and physical activities: 1987- 2002 (% adults16+)

	1987	1990	1993	1996	2002
Walking 2 miles or more	38	41	41	45	35
Swimming	13	15	15	15	14
Keep fit or yoga	9	12	12	12	12
Cycling	8	9	10	11	9
Running, jogging	5	5	5	5	5
Weight training	-	-	-	6	5
Football	5	5	4	5	5
Golf	4	5	5	5	5
Tennis	2	2	2	2	2
Badminton	3	3	3	2	2
Fishing	2	2	2	2	2
Squash	3	3	2	1	1
At least one activity excl. walking	45	48	47	46	43

Notes: Percentage participating in 4 weeks before interview Source: GHS

[16] SkillsActive SSA Visioning Workshops with the Sport Sector, 2005

[≠] This includes walking although the questions have been changed so trend information is not valid, shown as indicative

[11] Sport England and UK Sport Participation in Sport in Great Britain 1996 / Sport and Leisure – Results from the Sport and Leisure Module of the 2002 General Household Survey

The longitudinal studies (GHS, TGI) point to the following general changes in consumer demand which are now generally agreed by the sports industry:

• Between the 1970s and the 1990s, public participation in sports expanded substantially. Indoor sports increased much faster than outdoor activities, due to the creation of multi-sport leisure centres, usually with 'wet' facilities. In particular, female participation in indoor activities increased, and older people, children and minority groups were encouraged to take up sports. (Nevertheless, the typical keen sports participant is still likely to be a teenager or young adult, usually male.) The 1990s brought the start of declines in participation for many sports, and the decline continued into the early 2000s. - from LEISURE & RECREATION MARKET 2005 (Key Note).

Experian[17] note that the Olympics is likely to increase demand for participation in Olympic sports due to a desire to compete, a wish to understand the games people will get a chance to watch, encouragement of successful competitors in the games themselves, and the opportunities created by new resources and 'home-grown' development programmes. The impact of the games is likely to be most positive in the south east of England, and in areas where there is an established excellence for a particular Olympic sport. Funding from the national lottery and the government will boost Sport and Recreation facilities in England. The Culture, Media and Sports Secretary announced in July that an extra one million pounds a year would be going towards the Talented Athlete Scholarship Scheme. However, funds may be squeezed from non-Olympic activities.

- Publicity around the Olympics may encourage people to volunteer within the Sport and Recreation sector, increasing the workforce and decreasing the cost of certain activities. However, volunteers are not cost free – they will need a certain level of training and insurance.
- With an increase in affluence, people will increasingly demand 'experiences'. Sport and Recreation activities will need to be packaged into customised experiences to compete with a number of other ways in which people will be able to spend their disposable incomes.
- Extreme sports like surfing or sky diving, and street sports like skateboarding and roller blading may grow in popularity and result in a shift from team to individual sports.

4.1.2 Globalisation

As a series of consumer services and professional activities, sports and recreation are not open to globalisation in the sense of international brands or trade in goods, but some global drivers can be listed:

• Many sports which are played widely around the world had their origins in the UK, at least in terms of the codification of games which had existed informally. Accordingly, expectations are often unrealistically high for UK performers, driven up by the media.

• Football is the most popular sport in the world at several levels: amateur play, professional leagues, international tournaments, media coverage. An obvious aspect of globalisation is the transfer of skills represented by British clubs signing foreign players, although transfers in the opposite direction are now few and far between. However, although there are world famous football clubs such as Manchester United (now with American owners), support for clubs in football and other team sports is generally characterised by fiercely parochial passions, not global interests.

[17] *The Future for Active Leisure and Learning – England*, Experian, September, 2005

• Athletics operates at a global level, as epitomised by regular tournaments such as the Olympics and World Athletics Championships. The goal of most athletes is to achieve international recognition, and skills transfer is common (e.g. British athletes training in the US for better facilities and coaching, and even the common cases of athletes changing their nationality)

• Aside from the exceptions of football and athletics, most other sports have a variable degree of popularity across the globe, although many of the less popular sports globally have strong support in the UK, including rugby and cricket. Basketball is far more popular in the US, while cycling and skiing are much better developed in continental Europe than here.

• Most sports through their National Governing Body will be a member of the International Federation, and governance (rules and procedures), and training will usually be synchronised around the globe [16].

• Global trends are generating interest in some new sports like 'futsal' – 5-a-side football, and beach rugby[16].

• The sports goods market is very much a globalised one. Sportswear and equipment are mainly made for world markets in the Far East and Pacific Basin where the requisite combination exists of low to moderate labour costs and manual skill. In sportswear, adidas' purchase of Reebok in 2005 reduced the world's 'big three' companies to a duo, led by Nike, and these companies also rank as the world's largest producers of clothing, not just sportswear.

• Sport has always lead to a high degree of mobility for elite athletes and elite coaches, but like the rest of the SkillsActive sector, one of the major global influences has been the increase in immigration at an operational level. Some of these workers are 'backpackers' while there is also an influx from eastern Europe, and English speaking countries like South Africa.

• While elite players and coaches may rely heavily on performance and reputation in seeking work, there is a greater issue about comparability or transferability of qualifications at lower levels. An attempt to establish a consensus in terms of certification at NVQ level proved impossible. Degree level qualifications are thought to be more comparable.

4.1.3 Technological change

Technology has a contradictory relationship with sports. On one hand, sports which stress pure, physical endeavour have an almost luddite relationship to changes brought by technology. As argued by Key Note in its UK Sports Review 2003:

"Participation in many sports and outdoor activities is a sign of a rebellion against technologies which tie the office worker to a desk, staring at a screen for most of the day; and also against the technological advance of the car, which substitutes for journeys that would once have been taken on foot or cycle, requiring the expenditure of physical energy."

On the other hand, technology has influenced sports intimately at a number of levels, examples being:

• The use of advanced materials to improve equipment such as golf clubs and rackets, new models of canoe every 6 months etc

[16] SkillsActive SSA Visioning Workshops with the Sport Sector, 2005
[16] ibid

• Better protection from the weather, also stemming from materials technology, which encourages more people to take up outdoor pursuits

• Advances in the construction of footwear to provide better kicking, jumping or running

• New equipment and other technology not directly linked to the sport which can improve participation like movement technology to track activity levels, or 'texting' youngsters or mobile phone technology, cameras, videos and downloading programs which allow distance coaching to enhance performance[16].

• Broadcasting technologies which if introduced could improve key decision making and improve the TV-viewing experience (e.g. slow motion replays, 'third umpires', speedometers and interactive TV).

"It helped hockey recover from bankruptcy – cancelling postage costs" BOA

• The Internet has had a positive impact on the cost involved for NGBs and Clubs in communicating with and tracking their membership for KPI reporting.

• Internet booking systems appear to assist with administration, but there is also a need to manage them effectively to prevent 'ghost bookings', and increases in 'no-show' rates have been reported, because players do not feel the same compunction to cancel resulting in less than optimum use of facilities.

• CRM systems for managing club membership and even to track pay-as-you-play customers are in their early stages of development. Clubs have also reported practical difficulties with the Data Protection Act.

• Training and CPD using CD-ROMs, The Internet and other technology enabled distance learning have provided more flexible training opportunities.

Technology therefore presents both challenges and opportunities. For example, governing bodies must assess whether new equipment or apparel developed using advanced technology can by used for a sport. There have been efforts to reign in technology for physical and spectator benefits (e.g. Javellin and Tennis balls). Increased sports coverage on TV may also lead to more spectator rather than participatory involvement in sport. Computer games and other sedentary pastimes are a major challenge to active participation among the younger generation.

4.1.4 Government policy and regulatory framework

Current government policy on sport was introduced in section 2.1. In viewing government policy as an external driver of the Sport and Recreation market, the following major initiatives can be summarised:

• The long-term policy of central government with regard to sport has been to distribute funding through non-departmental agencies (the national sports councils), although delivery is usually localised and therefore involves local government.

• Various official strategies have been in place for Sport and Recreation to be less dependent on public funding since the 1980s. In the 1980s, Compulsory Competitive Tendering (CTT) was incorporated in new Local Government Acts, forcing local authorities to involve the private sector by putting services out to tender, including the management of sports facilities.

[16] SkillsActive SSA Visioning Workshops with Sport Sector, 2005

There was opposition to CCT in Labour-controlled areas and CCT was abandoned with the change to a Labour government in 1997, but the basic principle of obtaining Best Value for public services was continued.

• The Audit Commission carried out a consultation in the summer of 2005 which described proposals to introduce a new 'culture block' to the Comprehensive Performance Assessment (CPA). The new culture block includes Sport, Recreation and Play, with suggested performance indicators for each. Although, following the consultation, the exact format the new culture block is yet to be decided by the Audit Commission, if proposals are accepted it will have big implications for the provision of active leisure opportunities by Local Authorities, creating an incentive to provide new and better services.

• Local Authorities are a major provider of services for sport and for fitness, although recreation has been seen as an easy target for budgets cuts because it was not a 'statutory' service – see 4.3.2 Funding .

• The latest initiative affecting sport at the local authority level is TAES (Towards An Excellent Service), described as a performance management framework for Sport and Recreation services. TAES is a collaborative initiative involving now fewer than ten organisations (Audit Commission, Central Council of Physical Recreation, Department for Culture, Media and Sport, Improvement and Development Agency (IDeA), Institute of Leisure and Amenity Management, Institute of Local Government Studies (INLOGOV), Institute of Sport and Recreation Management, National Association for Sports Development and the Office of the Deputy Prime Minister). TAES will provide a basis for self-assessment, act as a vehicle for setting national priorities alongside local priorities, and provide a potential basis for inspection processes ("should these be developed in future", according to Sport England).

• A vital policy decision was taken when the National Lottery was launched in 1994. Sport was named as one of the regular Good Causes, and other Sport and Recreation-related projects have benefited from grants channelled through the Millennium Commission, Awards for All (from 2002) and The BIG Lottery Fund (from 2004).

It's worth noting that some participants in our Visioning Workshops felt that Lottery funding had displaced existing funding rather than adding to the monies available[18].

• The Department for Culture, Media and Sport produced a Game Plan in 2002 which 'called for sport to get its act together'. The first Game Plan Delivery Report (2004) incorporates a progress report on the national strategy for PE, school sport and club links and a supplementary report on The Government's Plan for Sport. The Delivery Report covers the implementation of Game Plan's recommendations on:

- developing the UK's sport and physical activity culture
- enhancing international success
- improving our approach to mega events and major sporting facilities
- improving our organisational structures for delivering sport and physical activity

• Sport For All was a very clear concept which underpinned the role of the Sports Councils in the 1970s but participation in Sport and Recreation has, at best, stagnated since the 1980s. Sport England has now been forced to adopt much simpler targets:

1. To increase the number of people taking part in sport and active recreation for at least 30 minutes on three occasions each week by an average of 1% per year through to 2020

[18] SkillsActive SSA Visioning Workshops with the Sport Sector in Scotland, 2005

2. To make England the best sporting nation in the world by 2020

- from Framework for Sport in England, 2004

The freedom to take part in sport is crucial, and while governments provide some financial support they also create legislation which hampers the very organisations they aim to help.

Government policies that are likely to have a dampening effect on the sector include an increase in income and council tax, reducing the level of income that they have available to spend on leisure. Taxing road use per mile would also discourage people travelling to rural areas to take part in outdoor activities, although improvements in public transport may mitigate this impact.

The European Working Time Directive protecting the rights of part-time workers and minimum wage legislation will have an impact on the sector due to the propensity of part-time workers and long working hours. The Disability Discrimination Act has had a short term impact increasing costs to businesses where they have had to meet the standards set for accessibility.

Conforming to these new legislative requirements from has added an extra layer of cost in bureaucracy and monitoring systems for commercial operators, without a corresponding increase in business to compensate. There is a feeling the Industry is beginning to labour under increased legislation and regulation, designed to protect the consumer, the environment and the employee. Particular examples include the Working at Heights, see 2.3.4.

"Concerns were voiced that bureaucracy and procedural issues are becoming increasingly restrictive to the volunteer base in Wales. Child protection protocols, health and safety and the 'ambulance chasing' claim culture were all mentioned as examples of concerns in recruiting and maintaining a vibrant volunteer base."

- from SkillsActive workshop in Wales

4.2 Performance and Competitive position of sector

Having examined sport in England, the Carter Report concluded that:

"The reality of our current relative sporting position presents significant opportunities for improvement. At all levels –participation, club membership and elite performance – we face challenges. The burden of inactivity will weigh increasingly heavily on the nation's health: current and future funding levels will have to be more focused to redress the balance"

In analysing the competitive position of the Sport and Recreation sector, the following examples of strengths and weaknesses were identified by the qualitative workshops run for Skills Active in 2005 in various parts of the UK:

Strengths

• Government bodies are helping to raise profile of Sport and Recreation in context of health and education

• Partnerships are strengthening Sport and Recreation, including central and local government, sports councils and NGBs

• There is an increasing level of choice with the introduction of new activities

• For employment, sport is fashionable to work in (attracts youth)

• Positive role models in Sport and Recreation can attract under-privileged youths who may succeed in sport whereas they might find it more difficult in business or cultural activities

• Many sports are global so that success or quality of coaching and facilities is immediately publicised and recognised internationally, for instance when athletic meets or boxing matches are held in the UK.

Weaknesses

• Lack of funding for some key areas

• Escalating costs

• A high level of staff turnover in the sector

• Lack of cross border co-operation some areas of Wales causing unnecessary local duplication

• A need for prioritisation to achieve maximum impact

• Fashion in sport: which sport to fund? This can be divisive when different social groups are involved in each sport

• Media coverage is widespread but it also shows up the failings of professional sport (e.g. drug use, spoiled teenage superstars with shallow values)

• Globalisation also means that top UK performers may transfer their skills abroad, either as players or coaches (e.g. athletes training in the USA)

Perhaps the ultimate weakness, or Achilles heel, of the Sport and Recreation sector is fragmentation: it is comprised of so many different sports and recreational activities.
This makes it difficult to construct a strategy to promote all types of sport and recreation, some of which are mutually exclusive. The table below illustrates this fragmentation, showing the fragmented division of awards under the Sportsmatch sponsorship scheme (in which private sponsorship funds are 'matched' by the same amount of public funding through Sportsmatch grants).

Sportsmatch Support, 1993-2004

	Number of Awards	Value £m
Multi-sport	514	4.9
Football	744	6.9
Rugby Union	712	6.2
Cricket	585	3.3
Basketball	354	2.5
Tennis	275	1.6
Athletics	177	1.1
Rugby League	164	3.5
Rowing	146	0.6
Hockey (field)	132	0.4
Sailing	79	0.5

Swimming	74	0.5
Gymnastics	61	0.3
Boxing	44	0.2
Cycling	39	0.4
Table tennis	39	0.3
Ice hockey	29	0.3
Golf	23	0.3
Keep fit, aerobics	15	0.2
Other individual sports	521	2.3

Source: Sportsmatch website

Another graphic illustration of fragmentation in Sport and Recreation comes in the equipment market. This occurs between sports but also within each sport (e.g. for tennis, manufacturing of racket frames, strings, grips, balls, nets, with few economies of scale).

4.2.1 Performance goals

A defining characteristic of Sport and Recreation is the split between amateur and professional activities. While amateur activity is increasingly seen, in policy terms, as a way of improving the nation's health through activity, there is also a push for the UK to achieve at the highest level (e.g. numbers of medals at the Olympics). World class performances by professionals inspire the young to take an interest in sport, and in many sports there is a continuum from learning basic skills at a young age through regular participation to "excellence" in performance which may be professionally rewarded.

Fragmentation makes it difficult to assess the UK's performance goals over all sports.

4.2.2 Social goals

The main difficulty with analysing Sport and Recreation as a competitive business stems from the social goals that the sector seeks to achieve, which are very different from the goals of most other business sectors. These goals must be incorporated into the assessment of the Key Drivers, but they are expressed very differently from the commercial goals of, for instance, generating turnover, increasing market share or finding export markets which characterise most sectors of the economy.

The social goals are dictated by government policy, as reviewed above. Well-being, relaxation, enjoyment or stimulation are all legitimate concepts for measuring the success of the provision of Sport and Recreation facilities and of access to sport for the general public.

The social goalposts have been shifted, however, by the rapid rise in obesity which may, in small part, be related to the gradual decline in sports participation. Choosing Health?, the government's consultation paper launched in 2004, includes sport as one way of improving the health of the nation.

Another social goal which is now incumbent on sport in some areas is to reduce crime:
" Up to £1m of government money was spent encouraging youngsters in east London to engage in physical activities and over 64,000 young people took part in 26 different Olympic activities. This has left Newham, one of the host Olympic boroughs, with more agile children, but the issue exciting administrators and government ministers alike is the fact that the ongoing drive to promote sport also seems to have brought about a dramatic reduction in crime. In the past year, the number of young people in the borough making a first court appearance to face criminal charges has dropped by 25%. This compares with a 1% reduction in

other parts of London. Overall the figures for juvenile court appearances in Newham, including those by first time and repeat offenders, are down 38%."
http://society.guardian.co.uk/crimeandpunishment/story/0,8150,1544825,00.html

4.3 Current performance of sector

Measuring the performance of the Sport and Recreation sector in economic terms is rendered difficult by several characteristics of the sector, including its non-commercial goals (social goals like crime reduction and social inclusion) and the vast fragmentation of the market for sports, covered above in 4.2.

4.3.1 Generating employment

Although output is difficult to measure in Sport and Recreation, one of the standard measures of size and growth for a company or business sector is employment. Sustaining a high and adequate level of employment in Sport and Recreation can be seen as a social goal, as well as an economic one.

According to calculations for the Value of the Sports Economy in England[19] report, some 400,000 jobs can be attributed to Sport and Recreation, amounting to a 2% share of UK employment (up from 1.5% in 1998, an impressive achievement in two years). This does, however, take a very wide-ranging definition of Sport and Recreation employment, including manufacturing, sports shop workers and ancillary workers (e.g. for the catering trades at stadiums). The different definitions used in the Value of Sports Monitor and in the estimates presented in Section 3.2. explain a great deal of the difference between the employment estimates.

The advantages of Sport and Recreation as a generator of employment are numerous and include:

• Attractiveness of the sector to young workers, only in part because young people predominate among sports participants. The greying of the population, however, also makes it desirable for more older workers to be recruited, to encourage suitable sports (bowls, golf etc) and to avoid older participants feeling physically intimidated by young staff

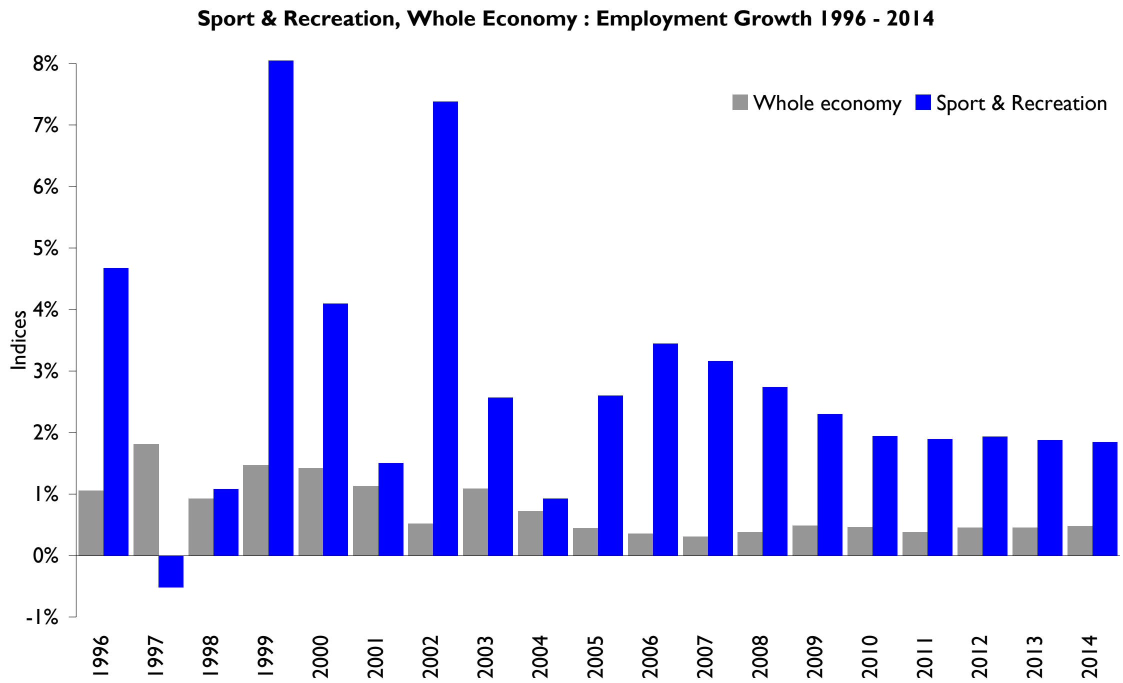
• A wide variety of jobs are available. The choice ranges across indoor and outdoor work

• Employment in Sport and Recreation offers the chance to use the facilities oneself or pursue a personal interest in sporting activities. However, this may be offset by long and unsocial hours, relatively low pay and conditions.

• Opportunities for entrepreneurs, part-time workers, sub-contractors, free lancers and other contributors to the sector. For example, a large leisure centre or sports clubs can offer part-time or free lance work to nursery workers, personal trainers, chiropodists, beauticians etc. At another level, golf clubs and tennis clubs have resident professionals who may have multi-faceted careers as professional competitors, coaches, advisors and retailers (e.g. through golf club pro shops).

As noted in Section 3.3.2 Sport and Recreation is the largest sub-sector in Active Learning and Leisure, accounting for 63 per cent of employment. Figure 4.3.1 below illustrates the dramatic growth in Sport employment over the last 5 years. Experian predict the sector will continue to outperform the whole economy until 2014.

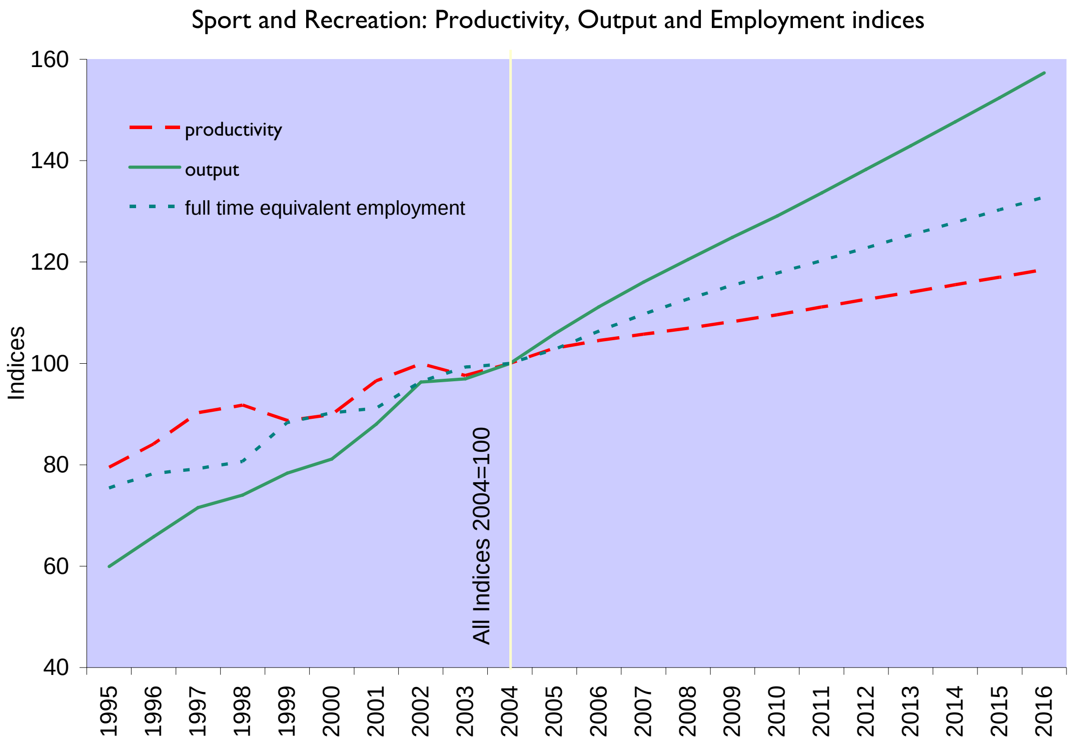
[19] The Value of the Sports Economy in England, Cambridge Econometrics



Source: The Future of the Active Leisure and learning: Sport and Recreation, Experian Business Strategies, 2005

4.3.2 Analysis of productivity drivers

Productivity in Sport and Recreation estimated to be approximately £20,000 in 2004. Productivity has increased by 21% in the ten years to 2004 and as shown below is expected to continue to increase at a similar rate (productivity index for 2016=118). Due to the assumed relationship between productivity, output and full time equivalent employment, the gains in productivity can only be achieved if the growth in output is at a grater rate than the rate of growth in employment. This is expected to be the case in the sector in the future and has been witnessed in the decade to 2004.



Source: SkillsActive Experian 2005

4.3.3 Consumer spending

There have been attempts to measure total spending on sport in the economy, notably the Value of the Sports Economy in England study by Cambridge Econometrics, published in 2004 but measuring the market in 2000. The Leisure Industries Research Centre (LIRC), a joint research centre of the University of Sheffield and Sheffield Hallam University, has been putting a value on the UK sports economy since 1998.

The danger of these studies is that they spread the coverage so wide as exaggerate the final figures, since the types and motivations of spending are so different.

In Lira's Sport Market Forecasts 2000-2004, the UK market is valued at £18.1bn for 2003 (2% of GDP). This takes in consumers' participation costs in sport (£2.3bn), health and fitness subscriptions (£1.8bn), spectating (£0.9bn) and equipment (£2.1bn, including boats), producing a total for core spending by consumers of £7.1bn. More debatable is the inclusion of spending on sports clothing and footwear (£3.6bn) which, as the clothing industry has recognised for many years, is predominantly made up of leisurewear purchasing. Furthermore, sport-related gambling is included (£3bn) as are sports television and video spending (£2.3bn), and most commentators would classify these as separate from the sports economy (e.g. gambling or television viewing with a "sporting theme").

A narrower view of consumer spending on sport is given in the government's Expenditure and Food Survey (formerly the Family Expenditure Survey), published as Family Spending. This long-running survey recorded the fact that household spending on spectator sport trebled in value during the 1990s but it appears to have peaked in 2002 at around £660m (or 70p per household per week). This only refers to admission charges, and excludes transport costs, programmes, betting, food and drink and any other spending that makes for a "day out at the football".

The latest Family Spending results suggest that spending on active participation in sport has also peaked, having risen quite dramatically in the late 1990s – from £1 weekly per household in 1997 to £1.40 by 2002, slipping back to £1.10 by 2004. This partly reflects the health club boom, although the category is defined as "Participant sports (excluding subscriptions)" and therefore consists of ad hoc payments for participation – "pay per play" – whereas most health clubs are members-only. Spending on "Equipment for sport, camping and open-air recreation" is currently worth £1.3bn a year, according to Family Spending.

4.3.4 Public investment

Several waves of change have occurred in public Sport and Recreation provision over the last 30 years and these need not be detailed here as they have run parallel to the government policies described earlier, but they include:

• Investment by local authorities which, according to the Chartered Institute of Public Finance and Accountancy, spend over £1bn a year on sport and recreation. The character of local investment has changed, however, with the move to private management by some authorities and a shift from sports to health and fitness priorities

• The bonus provided by the Sports Lottery Fund, which typically takes around 20% of funding from the Lottery ever year. By mid-2005, over £3bn had been invested in sport through the fund.

• The high degree of reliance on Local Authority funding for public sport and leisure facilities has caused some concern over recent years as leisure services were not counted as 'statutory' services. It was feared that leisure was often an easy target for budget cuts in council reviews as the money was not ring-fenced[16].

According to the Carter Report[9], two thirds of public investment in England is through local authorities, with 22% coming from the Lottery and 11% directly from central government.

Currently, SkillsActive notes the following amounts being spent:

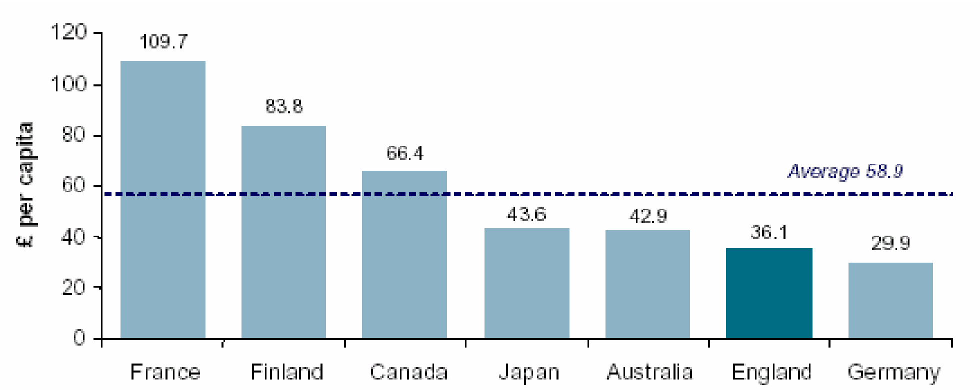
"The Government is investing unprecedented amounts into school and community sports facilities. £581 million into the New Opportunities Fund's school sport programme, £459 million into the PE, School Sport and Club Links programme, £108 million into community facilities through Active England and £60 million into voluntary sports clubs through the Community Club Development Programme."

Despite this investment there are problems. The 1,000+ large public leisure centres built in the 1970s and 1980s are ageing, and in addition to the cost of on-going maintenance, they face the requirement for massive investment to update these facilities. The Carter Report pointed to the fact that the average local authority (LA) leisure facility is around 25 years old and that less than one third of leisure centres are under 20 years old. This makes them "unattractive to an increasingly sophisticated consumer." (Carter also noted that private sector facilities are more modern, average age 11 years, but this was a false comparison. The vast majority of private facilities have been built for Health and Fitness, whereas LA leisure centres are multi-sport centres, typically built 25 years ago, which usually include fitness rooms added to them during the 1990s.)

[16] SkillsActive SSA Visioning Workshops with the Sport sector, 2005
[9] Review of National Sport Effort and Resources, Patrick Carter, April 2005

The Carter Report concluded that public investment per capita in sport in England was 37% less than an international peer group average.

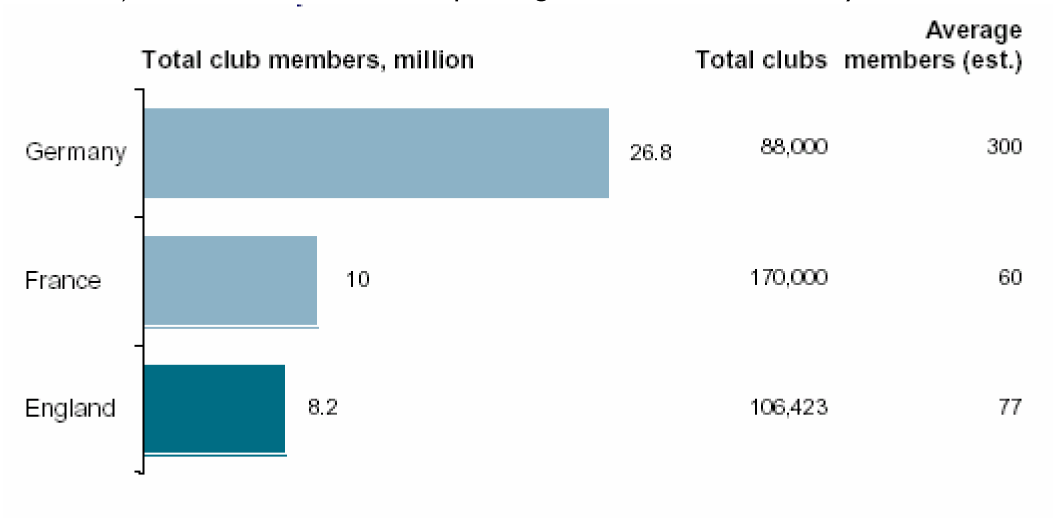
Figure 4.3.4 a): Public investment in sport in England and peer countries



Carter[9] also noted that the USA does not have a "dependency culture" - sport is not a federal government responsibility - and that "commercial skill sets in NGBs and clubs are high."

The highest levels of state intervention in the peer group were in France and Finland. In Germany, Carter noted, sport benefits from "the spending power of a thriving club base and significant levels of 'social sponsorship' of club sport programmes and competitions", and this strong voluntary base has been noted in other European countries such as The Netherlands.

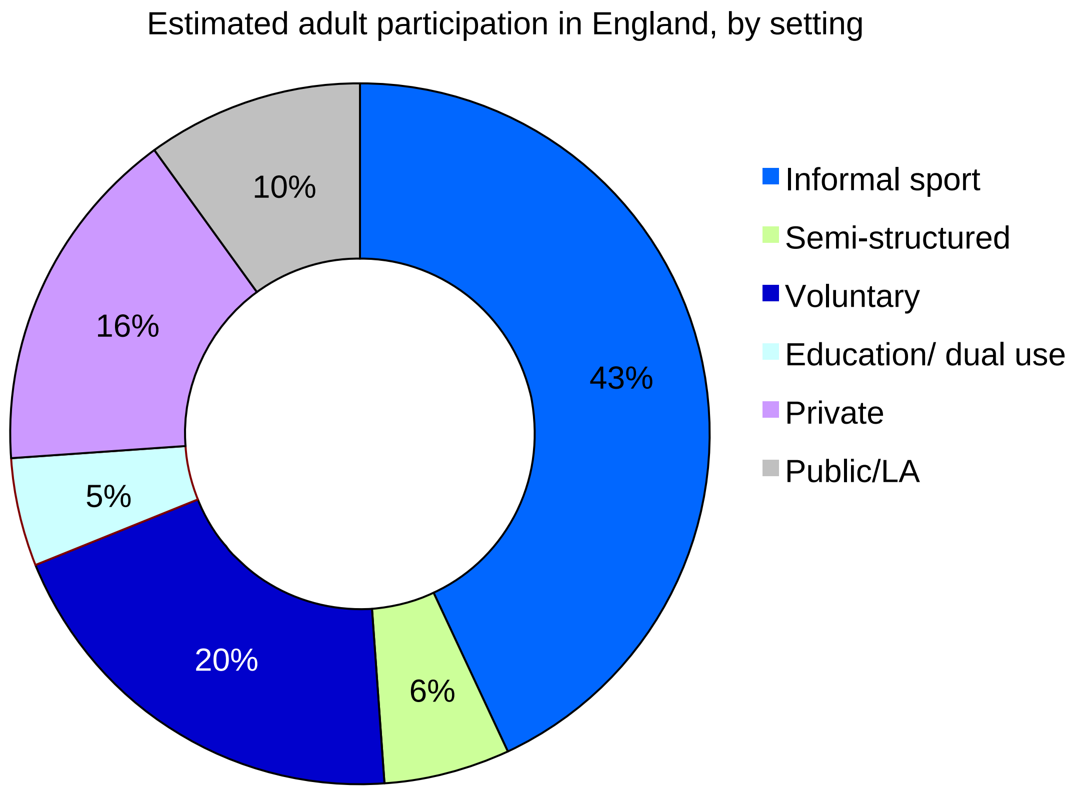
Figure 4.3.4 b): Club base and membership in England, France and Germany



Source: Review of national sport effort and resources, Patrick Carter, 2004

The absence of a strong private club infrastructure in the UK, by international standards, means that there is a reliance on public facilities and "informal sport" (43% of adult participation occasions).

[9] Review of National Sport Effort and Resources, Patrick Carter, March 2005



Source: Review of national sport effort and resources, Patrick Carter, 2004

4.3.5 Enterprise - Club membership

Company formation statistics would not do justice to the sport and recreation sector because of public, non-profit and voluntary roles. The supply-side of Sport and Recreation is dominated by organisations whose primary aim is to provide a socially valued service, and not to make a profit or pay dividends to shareholders. These organisations divide between government bodies (the public sector), both national and local, and non-profit, or voluntary, organisations such as the amateur sports clubs which are integral to Sport and Recreation provision.

Enterprise in Sport and Recreation must be defined to include voluntary involvement in private sports clubs. Across all sports, the voluntary sports clubs far outnumber the provision from the private and public sectors, with over 106,000 clubs affiliated to NGBs, with an average membership of 80 people and similar weekly sports visits [9]. Note that affiliated clubs recorded by NGBs as 'friendships groups' do not own physical assets. Voluntary sector sports clubs are typically single sport non-profit community clubs, often with no paid staff.

Across all sports, the voluntary sports clubs far outnumber the provision from the private and public sectors, with over 106,000 clubs affiliated to NGBs, with an average membership of 80 people and similar weekly sports visits [9]. Note that affiliated clubs recorded by NGBs as 'friendships groups' do not own physical assets. Voluntary sector sports clubs are typically single sport non-profit community clubs, often with no paid staff.

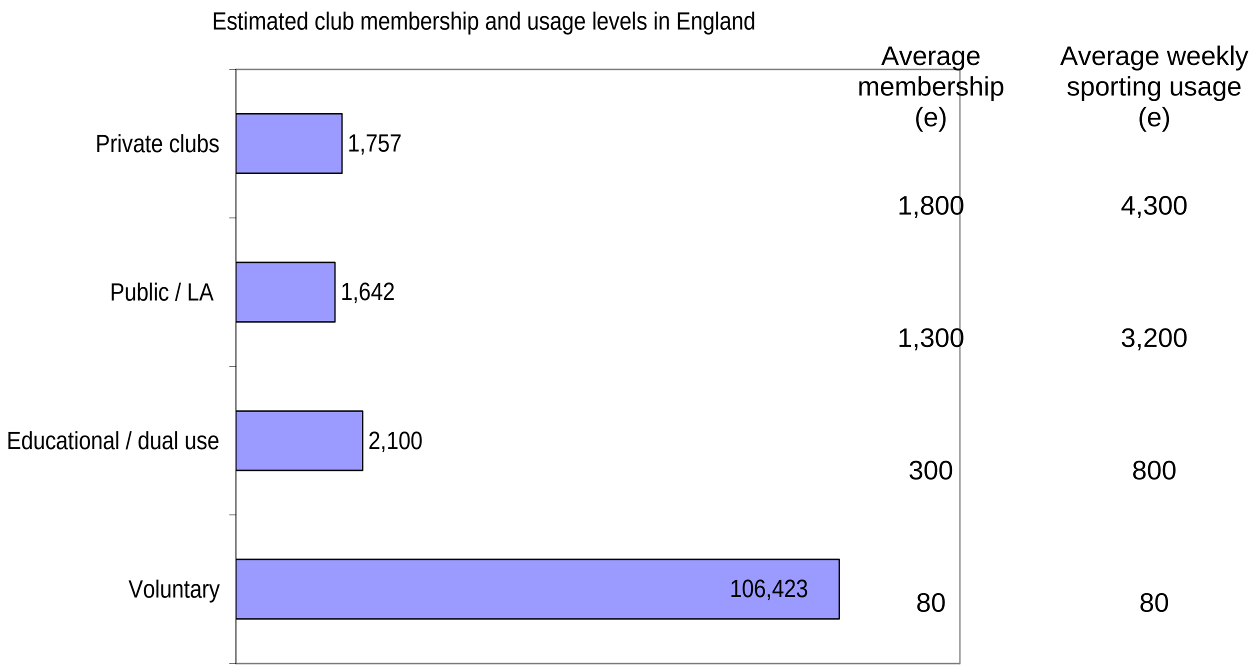
[9] Review of National Sport Effort and Resources, Patrick Carter, March 2005
[9] Review of National Sport Effort and Resources, Patrick Carter, March 2005

Private clubs generally have the best standard of sporting and ancillary facilities attracting the highest average membership levels (1,800) and active visits per week (4,300).

LA / public sector leisure centres have lower average membership levels (1,300) but no commitment 'pay and play' access charges help generate good weekly participation sessions (3,200).

Education-based, dual use sites are usually available for community use on a restricted basis which reduces comparative figures for both membership (300) and user sessions each week (800).

Figure 4.3.5: Club membership and usage levels



Source: Review of national sport effort and resources, Patrick Carter, 2004

4.3.6 Corporate investment in participation facilities

Profit-oriented companies tend to play very specific roles in Sport and Recreation. Corporate investment has been concentrated in Health and Fitness, not Sport and Recreation. Some large private clubs, like David Lloyd Leisure, offer a range of sports including racket sports, swimming pools, golf but their main focus is on fitness.

There have been some interesting developments in corporate investment in Sport and Recreation which could be embryonic in terms of shifting the balance away from public subsidy:

• JJB Sports, the UK's largest sports retailer, has 430 stores across the UK and Ireland. These include 227 superstores which, unlike the smaller town centre stores which focus on sportswear, also have the space to sell full ranges of equipment for many sports. Adjacent to some superstores, a chain of JJB health clubs has been developed, and there are also golf practice and training facilities next to JJB golf stores. The most recent investment has been in

Soccer Domes alongside five superstores, offering: "Small sided soccer both indoor and outdoor . . . . a revolutionary surface called 'Field Turf' . . . Saturday Clubs, Soccer Schools, Leagues and Competitions, Future Stars Play Area and Party Rooms"

• In golf, a number of commercial golf centres have opened which break into the traditional provision of golf in the UK at member-only, private clubs with traditional restrictions on play by gender and age. For example, the Brucefields Family Golf Centre near Stirling offers club-type competitions and membership plus pay-per-play on its two courses, a large driving range with teaching bays, a licensed restaurant and American Golf store. The Centre employs golf pros and physiotherapists and has disabled facilities.

• Vida, based in Edinburgh, is one of a number of specialists in providing five-a-side centres. It now has 11 centres in the UK. VIDA Sports Ltd also describes itself as "a leisure company which …also has interests in many other sports including gymnasiums, netball and basketball".

Like Health and Fitness, several sports markets are therefore shifting towards private provision with the emphasis on specialised facilities which is very different from the local authorities' emphasis on multi-leisure centres. Furthermore, this provides evidence that consumer demand for exclusivity is driving participation more and more.

In examining private investment in Sport and Recreation, it is also important not to see sports goods and services in complete isolation from each other. For example, the JJB, Vida and Brucefields centres are feasible because they draw on several income streams – membership, pay-per-play, catering and merchandise sold through stores. The on-site stores also develop the interest of manufacturers of sports goods, who benefit when playing facilities are adequate (and vice versa).

4.3.7 Professional spectator sports, including media coverage

Profit is also the motivation of another group of companies involved in Sport and Recreation: those which own or operate professional clubs and sports facilities, a sector dominated by football clubs. Passionate support, rather than profit, has been the driver of football clubs for most of their history, but the flotation of some clubs on the stock market – forcing them to act more rationally in generating profits and dividends – has been another instance of the private sector taking more interest in Sport and Recreation.

If there is one distinct trend, it is for football to continue increasing its market share of the passive sport market. Football spectating has increased, and the TGI figures[20] for watching football on television showed a whopping increase from 29.5% to 46.6% of adults between 2001 and 2005. Subscriptions to Sky TV, which has four sports channels, are increasing steadily, and this alone must be responsible for some of the increase in viewer numbers.

Television coverage of football has not entirely eclipsed the other main passive sports. Viewing figures have generally increased over the last five years for sports like rugby union, cricket, tennis, golf and athletics, resulting in ever increasing number of hours of broadcast sport (as monitored by Sports Marketing Surveys[21]) across a range of sports, notably golf and tennis. However, spectator interest in sport is clearly being influenced very strongly by the supply-side, and itself contributes to the sponsorship and media fees which are available to the most popular sports.

[20] BMRB 2001 / 2005
[21] Sports marketing Survey

One of the problems that may need to be solved in the near future is that of televising rights, which are steadily shifting towards the subscription-only sector (i.e. Sky or cable). The broadcasting of The Ashes series in 2005 greatly stimulated interest in cricket but the next series may only seen by Sky viewers with only the highlights reserved for terrestrial television.

4.3.8 Innovation in provision of sport

Some examples of innovation in Sport and Recreation provision were given under the investment sections (4.3.4-4.3.6), including the notable investment by a retailer, JJB Sports, into Sport and Recreation by adding participation venues adjacent to its superstores.

English sport is now being asked to innovate in order to justify the funding that it receives (from Sport England). From April 2005, the Whole Sport Plans insist that national governing bodies (NGBs) must create Plans which "embrace and connect with the activities of local authorities, school sports, community organisations and community sports clubs". Innovation is required because the funding body will no long accept ordinary "funding submissions", and any NGBs which fail to present a broad enough case run the risk of losing funding. Some sports will find it much easier than others to produce Whole Sport Plans, simply because some already receive a disproportionate amount of public support at national or local level.

Another level of innovation involves Public Finance Initiative (PFI) and Public Private Partnerships, which are taking public-private investment to a higher level in the new century. One of the impacts on Sport and Recreation could be the building of a new generation of schools which have dual-use of facilities at their heart, meaning that future supply of local Sport and Recreation facilities will be incorporated into educational investment. One example of a far-reaching PPP project is the regeneration of the Raploch public housing area in Stirling. The £17m Raploch Campus will incorporate housing and will "provide shared space where educational, sports and community facilities can work together to provide an enhanced and revitalised service for the people of Raploch" under a 30- year PPP maintenance contract with Stirling Council.

Also under the heading of innovation come the efforts being made to broaden out the appeal of sports to a more inclusive demographic. For example, the English Golf Union's mission statement for golf development is: "'To open up more golfing opportunities by creating a sustainable structure and supportive environment at national, regional and local level that allows people of any age, gender or background to experience the game of golf and sustain their participation ultimately through to golf club membership and beyond' . To this end, the EGU has created a separate website (www.getintogolf.org) to introduce newcomers to golf.

Football has had notable success in broadening out its playing structure. Although football is as popular as ever among men, the Football Association has produced remarkable statistics about female involvement:

"When The FA took over the running of women's and girls football in 1993, there were just 11,200 registered players – today that figure stands at over 61,000. Football reached a landmark achievement in the season 2001-02 when it became the top female sport in England – two years ahead of FA objectives. In reality, with figures from mini soccer, there are 88,000 players.

Girls' football is booming in England with the number of affiliated girl's teams having doubled in the past year. The overall number of female players has jumped a whopping 38 per cent in just one year, with 85,000 girls and women playing in affiliated league and cup competitions."

- from THE FOOTBALL ASSOCIATION (website)

4.3.9 Competition for sources of funding and revenue

Sport England and UK Sport now have plans "to fast-track change" by identifying twenty Priority sports – ten for development by Sport England, ten by UK Sport – and a further twelve Developmental sports. The theory is that nothing can be achieved if very small amounts of money are allocated across a vast range of sports at the national level.

Sports can clearly be prioritised if they attract a certain level of participation (e.g. over 0.2% of adults), but the "social goals" mean that six of the ten priority sports for Sport England are team sports, while three of them are the racket sports and golf is the other priority sport.

The Developmental sports cover a range of activities, each of which is evocative in some way of the role that Sport and Recreation plays for society by offering diversity. Amongst the developmental sports, basketball should have the potential to grow into a major sport in the UK; angling, water skiing and mountaineering are also in the Developmental list, pointing to the flexibility under which regional sports councils are allowed to support their own lists of sports. (For example, West Yorkshire Sport says that "we are also going to work with Boxing, Ice Hockey and Ice Skating because of specific strengths we have here."

At a very basic level, those responsible for funding sports have to make crucial decisions about allocating funding, and it may be based on local demand, not national priorities. Management for the multi-sport facilities that account for so much of Sport and Recreation time in the UK – the local authority sports or leisure centres – has to make strategic decisions on how much of the timetable to allocate to the various uses of the main hall (badminton, aerobics, five-a-side, netball and basketball traditionally have their share of usage, but there may be pressure to hire out the hall for functions or use it socially, such as for soft play).

Preparations for the Olympics could now overshadow many other current debates in Sport and Recreation. The emphasis for the next seven years will inevitably shift to excellence, or the "elite" end of Sport and Recreation. This could be beneficial to the Olympic sports and their NGBs if it takes pressure off them for solving obesity or raising participation by the public generally, but it may widen the gap between the Olympic and non-Olympic sports.

4.3.10 Income sources

Large commercial sports clubs have the opportunity to draw on a wider source of income than voluntary clubs, including a major contribution to revenues from spectator admissions, TV and Media fees. Clearly the more popular spectator sports Club membership and merchandising, and bar receipts can also figure strongly in the club's finances.

Income sources for schools' sports activities include government or LEA funding, augmented by parental fundraising. PESSCL has resulted in a major source of funding. It's worth noting that participants at the Visioning Workshops still felt that schools had been adversely affected by facilities being sold off, and cited examples where extensive travel was required to reach facilities like a sports track. Universities rely on a mix of government funding and student admission fees.

Local Authority public leisure facilities receive funding from government, augmented by the community charge, and in some cases by private donation. They can also raise revenue from admission fees, although it has been observed that pay-to-use charges are not elastic, so raised admission charges may be counterproductive in increasing participation rates.

National Governing Bodies of sport can receive 'Exchequor' funding through Sport England, supplemented by lottery funding and membership fees. Like admission charges, membership fees are not elastic and can easily deter participation. 'Exchequor' funding can require bureaucratic demands in claiming funds, and in monitoring and justifying associated targets, while changes to central funding can therefore leave a large whole in the finances which cannot be plugged using membership fees. Many NGBs run coach education courses or award schemes, where progression through key stages is rewarded with badges and certificates, both of which also operate as revenue earners. Some County FAs also generate income from disciplinary procedures.
Voluntary sports clubs receive 'exchequor funding' via the NGBs, supplemented by membership fees, competitions and events, bar receipts and other fundraising activities. This is one of the reasons why the sector is so reliant on the goodwill of volunteers.

The most unenviable task of the sports subsidy administrators like the sports councils is to choose which sports to support. Delivery of DCMS funding for sport takes place through the sports councils, and Sport England. Funding is often linked to past medal performance rather than future objectives or to increasing participation rates or meet a health, social or inclusion agenda rather than for 'pure' sport.

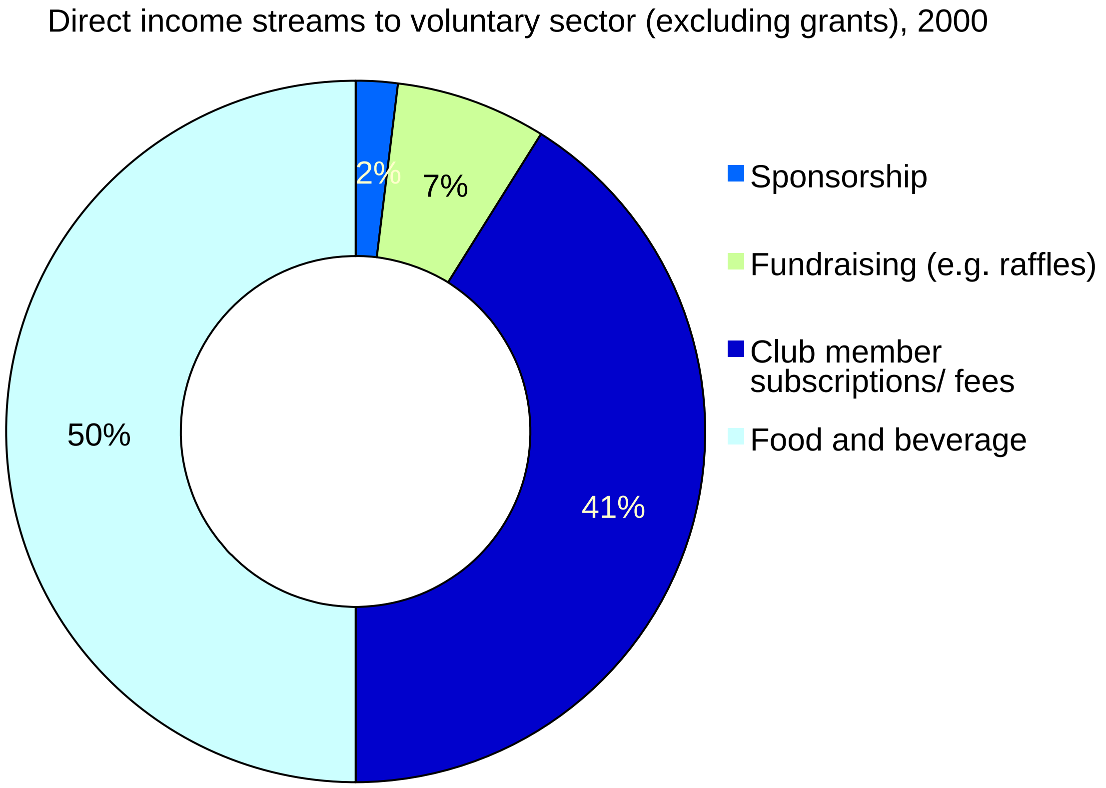
Funding is now being targeted and linked to medal performance or participation levels, which will be monitored through the Active Sport programme. But it is difficult for Sports to replace lost funding.

"This year £1m was cut in lottery funding, that's the whole sport plan money, which isn't ring fenced now, it has been moved from certain areas into other areas to subsidise those as they've lost that funding…Sport England are not very transparent why they cut £1m off and won't justify why £13m went into netball – a non-Olympic sport" British Gymnastics

There was a feeling that funding commitments were to short time scales (one to three years) making it difficult to achieve long term objectives. There was a perception that funding decisions by Sport England18 were not sufficiently transparent, and that additional layers of bureaucracy to manage applications, which is beyond the means of voluntary organisations. Alternative avenues, for example through the health agenda, are increasing access to funding but it was felt to be a shame that sport does not have direct support for its own sake, a concern expressed in the Visioning Workshops. There was a perception that there was a lack of transparency in decision-making about funding, which sports and how much. The three-year funding cycles are not compatible with a strategic and consistent approach.

The Carter Report recommends that the voluntary sector (mainly clubs and NGBS) should examine their income streams to see if sponsorship income can be increased from its current 2% contribution.

[18] *SkillsActive SSA Visioning Workshops with the Outdoors sector*, 2005



According to Carter, NGBs also need to "explore new ways of attracting commercial partners". Many NGBs are overly dependent on grant income rather than commercial income, particularly the smaller NGBs.

UKCC has funding until 2007 for 31 sports to develop common modules including generic coaching skills which will be covered in more detail in Stage two: Assessment of Current Provision.

According to Sports Volunteering in England, a 2003 study for Sport England by the LIRC:

- Sports volunteering has an economic value of over £14bn p.a.
- 5.8 million support sport as unpaid volunteers (26% of all volunteering)

The Sports Volunteering report concluded that: "Voluntary contribution to sport is of such a scale that when quantified it outstrips all other voluntary activity and dwarfs the amount of paid employment in sport." However, the report also warned that voluntary activity was being taken for granted, and that "volunteering in sport has not received the recognition and support from Government it deserves".

While investment of hard cash is not enough of itself to improve productivity, whose drivers must include a spirit of creativity and competition, many voluntary clubs struggle to survive. They are reliant on public funding, membership fees, and fundraising, and in the majority of cases they would not exist without the large numbers of volunteers who take on unpaid tasks from governance and finance to coaching and officiating. With increasing costs of insurance and fears of litigation, there is an increasing requirement to ensure paid and voluntary workers are appropriately trained.

4.3.11 Sector strategies for success

Key issues to emerge from the employer workshops focus around funding, recruitment and retention of paid and volunteer workforce.

There was a general feeling amongst Welsh employers that there is a strong supply of high calibre people available for Sports Development roles with a healthy level of competition. Leisure related posts however are far more difficult to recruit for.

Recruiting for voluntary posts is becoming more difficult as time demands and requirements increase. Key developments need to include better co-ordination and more formal management of the volunteer base by lead agencies/governing bodies. Coaching in particular was highlighted as a serious area of concern in terms of lack of volunteers coming forward.

In Scotland there was a need to develop consistency of jobs across the sector, leading to comparable job scope, transferable core and technical skills across the industry and therefore a nationwide career path. Industry needs to be better at defining job scope and recruiting accordingly.

In Northern Ireland the recurring problem of fixed-term contracts for Sports Development Officers (S.D.O's) was voiced a number of times throughout the workshop sessions. It was felt that S.D.O fixed-term contracts (typically 3-years) were detrimental to staff retention. It was common for many S.D.O's to move after two years for reasons of job security, therefore leaving a 'hard-to-fill' vacancy for a remaining 1-year contract period.

In England, Local Authority providers and Sports Clubs alike report an inability to make long term plans because of the vagaries of funding, and funding decisions. Short term financing leads to difficulties retaining (best) staff due to insecurity of funding as staff tend to move on by third term of funding period. employers claim they are less likely to invest in training and development as a result

4.3.12 International benchmarking

Has been covered throughout this report, where relevant

5. Implications for skills demand

5.1 Current skills and qualifications profile of sector

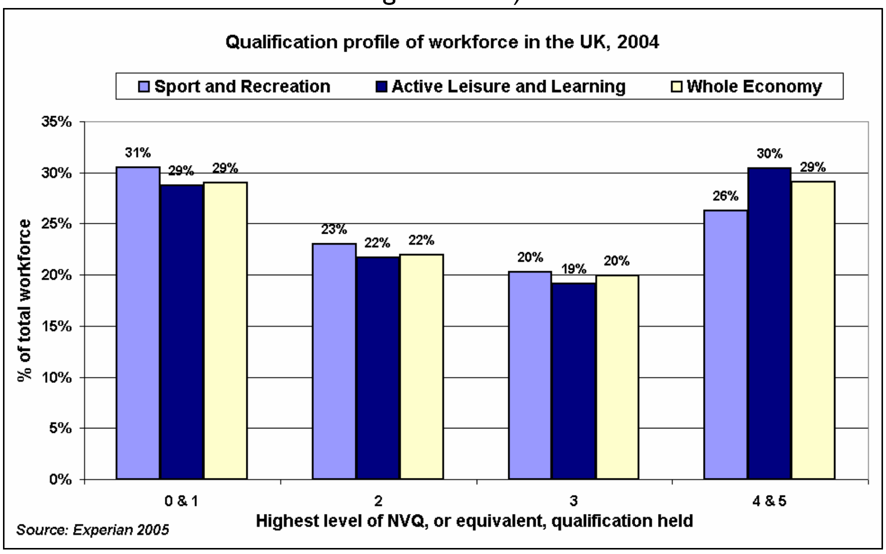
This section looks at the implications of developments in the sector for skills demand. It contains a detailed discussion of current skills gaps and shortages. There is an emphasis on this because skills gaps and shortages are significant issues for businesses affected. Their existence can have major implications, both for individual companies and for the industry as a whole. They can create difficulties of meeting quality standards, loss of orders to competitors, difficulties in introducing new working practices and new products and services and increased operating costs.

5.1.1 Qualifications

Figure x breaks down the UK Sport and Recreation workforce by the highest level of NVQ or equivalent qualification each individual has achieved.

- At 26 per cent of the total workforce, the proportion of the Sport and Recreation sector who hold, at highest, an NVQ or equivalent qualification at level 4 or 5 is slightly lower than for the whole economy (29 per cent) and for Active Leisure and Learning (30 per cent).
- The proportion of the Sport and Recreation workforce with none, level 1 or level 2 qualifications is slightly higher than for the Active Leisure and Learning workforce and the whole UK workforce. Thirty one per cent of Sport and Recreation workers hold, at most, none or level 1qualifications.

Figure 5.1.1a)



Looking at the type of qualifications held reveals more detail than purely the NVQ equivalent level. The younger age profile in the sector is a factor behind why a greater share of workers hold GCSEs. There is a greater proportion of the sector taking vocational qualifications than in the UK as a whole. This is offset by a smaller proportion of the sector progressing from A level to degree level qualifications.

Table 5.1.1 b): Sport & Recreation, Whole Economy by Type (qualification) already held (combined)

	Deg level qualification	A Level/Vocat'l A Level of equiv.	NVQ/SVQ	GNVQ/GSVQ	AS Level/Vocat'l AS Level or equiv	GCSE/Vocat'l GCSE
Sport & Recreation	18.0%	28.2%	13.6%	4.7%	4.4%	42.6%
All Sector Total	20.2%	24.5%	11.2%	2.2%	1.7%	26.6%
Difference	-2.2%	3.7%	2.4%	2.6%	2.7%	16.0%

Source: SkillsActive derived from LFS Autumn 2004 Public Regional (Reweighted)

5.1.2 Recruitment/skill shortages

Skills shortages occur when businesses cannot recruit enough people who are appropriately qualified, skilled or experienced. Skills shortages are deemed to exist when employers have a vacancy which they are finding hard-to-fill and the reasons for it being hard-to-fill are related to shortcomings in the skills, qualifications or experience of applicants.

The NESS estimated that 22 per cent of all establishments in the SkillsActive SSC area were facing vacancies at the time of the survey, equating to some 8,500 vacant jobs. Nine per cent of establishments within the SkillsActive SSC area reported that they were facing hard-to-fill vacancies (2,900 vacancies) and six per cent of establishments were facing a skill shortage vacancy (1,900 vacancies). Whilst the level of vacancies are slightly higher in the SkillsActive sector, the levels of hard-to-fill vacancies or skill shortage vacancies are similar to those for England overall. Skill shortage vacancies form 23 per cent of all vacancies (24 per cent across all England).

Table 5.1.2 a): Level of current vacancies, hard-to-fill vacancies and skill shortage vacancies

	SkillsActive SSC			**England**		
	% of estabs reporting	No. of vacs (n)	Vacs as % of employ-ment	% of estabs reportin g	No. of vacs (n)	Vacs as % of employ-ment
All vacancies	22	8,500	3	18	616,800	3
Hard-to-fill vacancies	9	2,900	1	8	227,200	1
Skill shortage vacancies	6	1,900	1	6	145,500	1

Source: National Employer Skills Survey, 2004

Base: all respondents

Forty-two per cent of SkillsActive establishments with vacancies found them hard-to-fill in 2004, and 54 per cent of those attributed this difficulty to a skills shortage.

A longer term picture of hard to fill vacancies was obtained from SkillsActive's Sport, Fitness and Outdoors Employment and Skills Survey in 2005. The survey asked for vacancy and hard to fill vacancies over the last 12 month period.

Table 5.1.2 b): Level of Paid Employment, Vacancies and Hard to fill vacancies in the last 12 months

	Paid Employment	SkillsActive Vacancies	Hard to fill vacancies
Managers, supervisors, senior administrators	43,176	11,488	2,772
Sports / community / play development officers	23,130	7,330	1,827
Coaches, teachers, instructors, activity leaders	131,841	41,832	9,943
Operational staff	75,917	19,397	5,168
Professional sports players and officials	23,039	514	154
Non-managerial support staff	42,763	16,776	5,616
Total	339,866	97,335	25,480

Over the longer time period, in excess of 97,000 vacancies were reported across Sport & Recreation, Health & Fitness and the Outdoors, equivalent to 29% of the workforce. The Non-managerial support staff occupations reported proportionally the highest rate of vacancies (39%). In the last year employers reported that 26% of vacancies were hard to fill, equivalent to 7% of the total workforce.

5.1.3 Recruitment/skill shortage vacancies

The 2005 SkillsActive Sport, Fitness and Outdoors Employment and Skills Survey also confirmed the NESS findings that skills shortages are a significant problem for employers in the sector. The three skills shortage reasons for hard to fill vacancies (Low number of applicants with the required skills, Lack of technical qualification required for the job and Lack of work experience the company demands) featured prominently in the factors given by employers.

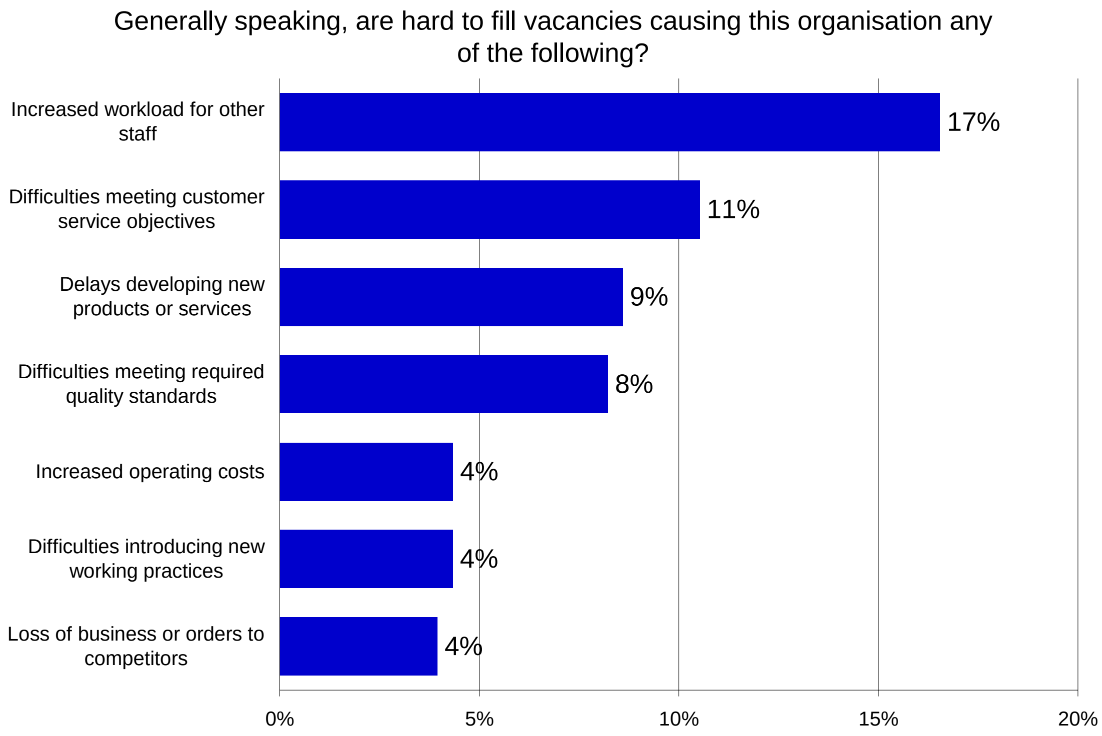
Table 5.1.3 a): Why have these jobs been hard to fill?
Multiple response

	% orgs
Any skill shortage reason (net)	83%
Low number of applicants with the required skills	61%
Low number of applicants generally	53%
Not enough people interested in this type of job	49%
Lack of technical qualification required for the job	39%
Poor terms and conditions offered for post/ Low pay	34%
Low number of applicants with the required attitude, motivation or personality	34%
Job entails shift work/unsociable hours	32%
Too much competition from other employers	20%
Lack of work experience the company demands	20%
Remote location/poor public transport	17%
Seasonal work	16%
Poor career progression / lack of prospects	15%
High cost / lack of accommodation	9%

Source: SkillsActive Employment and Skills Survey 2005
Base: All orgs with hard to fill vacancies

The most frequently cited implications of SSVs are an increased workload for other staff and difficulties meeting customer service objectives.

Figure 5.1.3 b) Reasons for hard-to-fill vacancies



5.1.4 Nature of skills deficiencies in applicants

Across the SkillsActive SSC area, the most common area of skill deficiency amongst applicants to skill shortage vacancies are team working skills (53 per cent of skill shortage vacancies), followed by communication skills (49 per cent), technical and practical skills (47 per cent) and customer handling skills (46 per cent)[ℵ].

There are notable differences between the skills shortages of applicants to vacancies in the SkillsActive SSC area compared to the rest of England as a whole – not surprisingly given the nature of the sector and the particular occupational distribution of vacancies. In particular, employers with skill shortage vacancies were more likely to note deficiencies in team working skills (53 per cent compared to 31 per cent), communications skills (49 per cent compared to 38 per cent) and customer handling skills (46 per cent compared to 36 per cent). In addition, 24 per cent of employers state that they cannot find applicants with relevant qualifications, compared to only four per cent across all England – this is likely to be because employers in the SkillsActive sector require very specific industry qualifications, often to comply with legislative and regulatory requirements.

Employers in SkillsActive SSC area are less likely to state that there were shortcomings in literacy skills (12 per cent compared to 23 per cent) and numeracy skills (eight per cent compared to 19 per cent): a surprising finding given the higher proportion of lower occupational workers in the sector. This is discussed further in Section 5.1.9.

[ℵ] This data is available nationally (and for some SSCs) on an occupational basis. However, the sample sizes for SkillsActive is not large enough to allow this occupational analysis

Table 5.1.4: Skills found difficult to obtain from applicants for skill shortage vacancies

Multiple response	SkillsActive %	England %
Team working skills	53	31
Communication skills	49	38
Technical & practical skills	47	50
Customer handling skills	46	36
Problem solving skills	29	29
Relevant qualifications	24	4
Management skills	16	19
Literacy skills	12	23
Personal attributes	12	5
General IT user skills	10	11
Numeracy skills	8	19
Foreign language skills	5	7
IT professional skills	3	9
Experience/lack of product knowledge	2	5
Other	7	9
No particular skills difficulties	8	11
Don't know	3	3
Weighted base	1,082	145,371
Unweighted base	116	7,541

Source: National Employer Skills Survey, 2003
Base: all respondents with skill shortage vacancies

5.1.5 Incidence of Skill gaps

Skill gaps exist when members of the existing workforce are thought to have lower skills than are necessary to meet business or industry objectives, when employers regard some of their staff as not being fully proficient to meet the requirements of their job.

It is estimated that 16 per cent of establishments in the SkillsActive SSC area suffered from internal skills gaps, higher than the 20 per cent reported for England as a whole. This data suggests that seven per cent of employment in the sector are not fully proficient, the same as the England level. This suggests that some 17,000 employees in the SkillsActive sector have some skills deficiency.

It is evident from this that the volume of skill gaps far exceeds that of recruitment problems, as in other sectors and across England. This would suggest that there is a need for sufficient emphasis on workforce development to address these gaps as well as looking at skill supply and the quality of entrants into the sector.

Table 5.1.5 a): Incidence of skills gaps

	% of ests reporting skills gap	*% of staff that are not fully proficient*	Wtd base
SkillsActive	16	7	15,665
England	20	7	1,410,248

Source: National Employer Skills Survey, 2004

Base: all respondents

When expressed as a proportion of staff, the gap for Sport and Recreation becomes 14 per cent in 2004. The survey was also carried out in 2003, a higher proportion of establishments reported a skills gap but a similar percentage of staff in those organisations are not fully proficient.

Table 5.1.5 b): Incidence of skills gaps by sub-sector

	% of ests reporting skills gap	*% of staff that are not fully proficient*	*Wtd base*	*Unwtd base*
England	**22**	**11**	**1,915,053**	**72,100**
SkillsActive	**24**	**13**	**24,472**	**1,337**
Sport and recreation	24	14	**21,739**	**1,252**

Source: National Employer Skills Survey, 2003
Base: all respondents

The main cause of skill gaps in each case is the fact that the members of staff have been recently recruited or a lack of experience: skill gaps are evidently linked to recruitment.

5.1.6 Nature of skill gaps

The major areas of skill gaps are in customer handling skills (60 per cent of employers with a skills gap), communication skills (55 per cent), team working skills (52 per cent) and problem solving skills (49 per cent).

Table 5.1.6 a): Nature of skill gaps

Multiple response	**SkillsActive** %	**England** %
Customer handling skills	60	50
Communication skills	55	53
Team working skills	52	43
Problem solving skills	49	47

Technical and practical skills	40	43
Management skills	38	32
General IT user skills	27	30
Numeracy skills	22	21
Literacy skills	20	22
IT professional skills	13	16
Foreign language skills	8	7
Personal attributes	2	3
Experience/lack off product knowledge	1	1
Sales/marketing/promotional/PR skills	1	1
Other	3	3
No particular skills difficulties	4	6
Don't know	1	1
Weighted base	**5,841**	**420,164**
Unweighted base	**480**	**24,014**

Source: National Employer Skills Survey, 2003

Base: all respondents with skill gaps

Again, this information is available on an occupational basis and this data shows that different occupational groups have different skills deficiencies. It also shows that the skills areas that are in deficiency tend to be central to performance of the job: they are not peripheral. Therefore we see that the skill most often lacking in Managers and senior officials are management skills (63 per cent), those most in shortage in Sales staff are customer handling skills (66 per cent) and communication skills (61 per cent).

Personal service occupations are important in the SkillsActive sector, particularly in Sport and Recreation, where coaches and instructors have the main contact with members or customers. The relationship between instructor and participant is recognised as one of the most important components for sector organisations in achieving participation or business targets and customer satisfaction.

It's interesting therefore to note that Personal service occupations were deemed to have the highest levels of skill deficiency for five of the six skills which rank highest in this chart: Customer handling skills (79 per cent), Communications skills (77 per cent) Problem solving skills (66 per cent) Technical and practical skills (49 per cent) and even Management skills (49 per cent). While Personal service occupations have lower skill gaps than Skilled trades for Team working skills these still mentioned by 72 per cent of respondents.

Employers tell us they prioritise Customer handling skills and Communications skills over Technical or practical skills when recruiting, as there is a general feeling that technical skills can be trained where customer service and communications skills are more dependent on personality.

Table 5.1.6 b): Nature of skill gaps

	Skills-Active	Mngrs	Ass profs	Admn staff	Skilled trades	Personal service	Sales	El occs
Multiple response	%	%	%	%	%	%	%	%
Customer handling skills	60	50	62	61	64	79	66	59
Communication skills	55	51	61	68	39	77	61	51
Team working skills	52	48	47	47	77	72	45	44
Problem solving skills	49	43	53	55	50	66	49	45
Technical and practical skills	40	23	34	34	38	49	41	52
Management skills	38	63	39	35	41	49	14	25
General IT user skills	27	36	37	57	9	26	15	18
Numeracy skills	22	22	22	38	5	28	26	18
Literacy skills	20	17	15	25	18	29	23	17
IT professional skills	13	24	6	21	2	11	12	9
Foreign language skills	8	6	21	6	21	7	2	4
Personal attributes	2	2	6	5	1	3	2	2
Experience/lack off product knowledge	1	1	6	0	1	0	0	1
Sales/marketing/ promotional/PR skills	1	0	0	8	0	0	0	0
Other	3	2	0	4	1	1	9	3
No particular skills difficulties	4	9	6	4	3	1	2	2
Don't know	1	1	0	0	1	0	0	2
Weighted base	**5,841**	1,067	292	752	771	617	586	1,283
Unweighted base	**480**	100	30	67	47	54	47	105

Source: National Employer Skills Survey, 2003

Base: all respondents with skill gaps

5.1.7 Occupations and qualifications required

Vacancies in the sectors of the SkillsActive SSC covered by the NESS survey are dominated by Personal service staff (26 per cent of vacancies) and Elementary staff (21 per cent of vacancies). This carries through into hard-to-fill vacancies where these two occupational groups account form the largest proportion. However, looking at skill shortage vacancies, the proportion formed by Personal service occupations rises to 46 per cent and that by Elementary occupations falls to three per cent.

5.1.8 'Technical' skills needs

To supplement NESS, SkillsActive asked a series of skills related questions in its own Sport, Fitness and Outdoors Employment and Skills Survey to identify skills specific to the sector missing from the NESS. These have been highlighted in blue in the table below.

Two groups emerge, one based around legislation and safety and a second based around the personal attributes needed to be successful in the sector. In the first group, skills such as Health and safety, Child protection, First aid and Equity can be included. In the second group, Initiative, Planning and preparing work, Ability to follow instructions and Sport-specific technical skills are found.

The survey reiterates the findings from the NESS which also showed the relative low importance given to IT and basic skills in the sector, especially when compared to other parts of the economy.

Table 5.1.8: Thinking of your current workforce, how important are the following skills?

Skill	Very important	Fairly important	Not very important	Not at all important	Mean score
Communication	89%	10%	0%	0%	3.9
Team-working	81%	18%	1%	0%	3.8
Health and safety	79%	17%	3%	1%	3.7
Customer service	75%	19%	6%	1%	3.7
Initiative	67%	32%	2%	0%	3.7
Personal appearance and attitude	68%	28%	4%	1%	3.6
Child protection	74%	17%	4%	4%	3.6
Planning and preparing work	54%	41%	5%	0%	3.5
Ability to follow instructions	56%	37%	6%	1%	3.5
Problem-solving	49%	45%	4%	1%	3.4
First aid	56%	31%	9%	4%	3.4
Reading and writing	49%	43%	7%	1%	3.4
Management	43%	48%	9%	0%	3.3
Sport-specific technical skill	48%	37%	11%	4%	3.3
Numeracy	35%	51%	12%	2%	3.2
Equity (e.g. working with disadvantaged communities)	43%	35%	16%	6%	3.2
Working with disabled people	37%	39%	18%	6%	3.1
Basic computer / IT skills	26%	51%	16%	7%	3.0
Maintenance/repair/use of equipment	35%	36%	19%	10%	3.0
Life saving	38%	23%	21%	18%	2.8
Project Management	22%	42%	28%	8%	2.8
Professional IT skills e.g. Computer programming	4%	17%	36%	43%	1.8
Foreign languages	2%	5%	34%	60%	1.5

Note
Skills recorded by NESS and by SkillsActive's Employment and Skills Survey 2005 (in blue)

Technical and practical skills are essential to a large proportion of SkillsActive sector occupations for legislative or regulatory reasons. Many roles in Sport and Recreation, Health and Fitness and the Outdoors work with under 8s in educational or care settings, which comply with the Ofsted standards for supervision – at least one Manager with a Level 3 qualification appropriate to the job, together with 2 years experience. In addition a minimum of 50 per cent of workers must hold an appropriate industry-specific level 2 qualification in order to satisfy the requirement that more junior staff are supervised at all times.

Additionally have to comply with Health and Safety guidelines for use of equipment / swimming pool / outdoors terrain. Consequently the same requirements apply to the need for staff to have achieved an industry-specific level 2 qualification, and that the minimum proportion of staff qualified to that level should be 50 per cent or greater in order to supervise other less- qualified colleagues.

In rural locations, a coach or instructor will usually require a minibus driving licence, which can only be attained by the age of 21.

5.1.9 'Generic' / cross sector skills needs

Management and leadership skills

Management and leadership have been identified as skill gaps across virtually all UK industry sectors.

Looking at the 2003 NESS data, whilst overall management skills are not rated as being needed at high levels across the areas of the sector covered (as would be expected) they are required at high and advanced levels by management staff. Around two thirds of Corporate managers (65 per cent) and Managers in services (67 per cent) require management skills to advanced or high levels.

Table 5.1.9 a): Current level of management skill required by managers

	Advanced	**High**	**Intermediate**	**Basic**	**Not required**	**DK**
	%	%	%	%	%	%
Corporate managers	25	40	29	5	*	0
Managers or proprietors in Services	25	42	27	6	*	0

Source: NESS, 2003

Base: all respondents who employ relevant occupational group

However, it is also worth noting that in the majority of cases (87 per cent of employers who employ Corporate managers and 84 per cent of those employing managers in Service industries) there is not expected to be any change in the level of management skill required. Only minorities (12 and 15 per cent respectively) expect the level of management skill to increase.

5.1.10 Basic skills

The 2003 NESS survey did not identify basic skills (literacy and numeracy) as being of particular importance for employees in the sector. Looking at the two largest employee groups (Leisure and personal service occupations and Elementary administration and service occupations) we can see that:

- less than one in five (18 per cent) of employers believed that their employees in leisure and personal service occupations needed Numeracy skills above intermediate level and just over a quarter (27 per cent) regarding Elementary staff. Nearly a quarter (23 per cent) of employers stated that Numeracy skills were not required amongst Elementary staff; and

- less than a quarter (22 per cent) of employers say that their staff employed in Leisure and personal service occupations need literacy skills beyond intermediate level and 25 per cent say the same for Elementary occupations.

Literacy and Numeracy skills come a considerable way down the list of skills needed for these occupational groups, below such skills as communication skills, customer handling skills, team working skills, problem solving skills, technical and practical skills and management skills. In addition, they are not amongst the skills which are most likely to be believed to be in deficiency in either applicants or amongst existing workers.

Table 5.1.10: Current level of skill required: Leisure and other personal service and Elementary administration and service occupations

	Advanced	**High**	**Intermediate**	**Basic**	**Not required**	**DK**
	%	%	%	%	%	%
Leisure and other personal service occupations						
Numeracy skills	6	12	26	46	11	0
Literacy skills	2	20	34	43	1	0
Elementary administration and service occupations						
Numeracy skills	7	20	26	24	23	0
Literacy skills	4	21	33	28	15	0

Source: NESS, 2003

Base: all respondents who employ relevant occupational group

Although it seems that basic skills are not an issue for employers, it may be the case that they matter for individuals, particularly with regard to their progression. Individuals who have basic skill deficiencies can operate effectively at lower level jobs (where other skills such as communication skills are more important), but in order to progress they need to have these basic skills in place so that they can deal with the increased levels of administration and paper work that comes with the higher level jobs.

5.1.11 IT skills

The SkillsActive sector is one in which the level of IT skills required appears to be low. Looking at General IT user skills, only a quarter of Corporate managers require these beyond intermediate, which falls to 22 per cent of managers in Service industries, one per cent of leisure and personal service occupations and nine per cent of Elementary occupations.

Table 5.1.11: Current level of IT skill required: managers, Leisure and other personal service and Elementary administration and service occupations

	Advanced	High	Intermediate	Basic	Not required	DK
	%	%	%	%	%	%
Corporate managers						
General IT user skills	6	19	35	27	13	0
IT professional skills	4	10	21	23	42	*
Managers in Service industries						
General IT user skills	6	16	39	20	19	0
IT professional skills	4	11	18	20	46	*
Leisure and other personal service occupations						
General IT user skills	*	1	8	27	64	0
IT professional skills	5	*	6	18	71	0
Elementary administration and service occupations						
General IT user skills	1	8	7	16	68	0
IT professional skills	0	4	3	8	85	*

Source: NESS, 2003

Base: all respondents who employ relevant occupational group

It seems to be the case that relatively few people need IT skills in employers in the sector. It is the case that only a minority of staff will use a computer on a day-to-day basis, the rest will be focussing on interaction with the client base on a face-to-face basis where communication skills are more important. However, the other side to this is that relatively few employees have the opportunity to develop their IT skills that they may have if they were working in a more office-based environment.

5.2 Future skills needs

During the time in which Experian forecasts were being developed for the sector it was announced that London had won the privilege of hosting the 2012 Olympic Games. As a consequence, the quantitative impact that this will have on the UK economy has not been factored into the forecasts presented in this chapter.

However, a discussion of the probable impact of the Olympics on Active Leisure and Learning and across the economy more widely, is considered within the scenario analysis in the latter chapters of this report.

The optimistic future of the Sport & Recreation sector revealed in the econometric forecasts is mirrored by employers in the sector. Over a third (37%) are planning major investment which would increase facilities and services offered at their sites. This varies from upgrading of facilities, refurbishment and extension to the range of sports offered to complete re building of facilities. Sixty per cent of organisations expect an increase in turnover with only 4 per cent expecting turnover to decrease.

5.2.1 Anticipated changes to output levels

Gross value added output in Sport and Recreation has grown at a strong average annual rate of 5.1 per cent over the last five years (Table 2.1). Although this was slightly below the average rate of growth experienced across Active Leisure and Learning, it was almost double the rate of growth experienced in the whole UK economy.

Over the next five years, output growth will slow in the Sport and Recreation sector, but will continue to exceed the rate across the whole of Active Leisure and Learning. With an average annual growth rate of 3.9 per cent over the next ten years, Sport and Recreation will significantly outperform both Active Leisure and Learning and the whole UK economy.

Table 5.2.1 Output* growth in Sport and Recreation in the UK

(Average annual growth, %)			
	1999 to 2004	2004 to 2009	2009 to 2014
Active Leisure and Learning	5.3%	3.6%	2.8%
Sport and Recreation	5.1%	4.3%	3.4%
Whole Economy	2.7%	2.8%	2.6%

*Measured as Gross Value Added (the net value of output or the value of income earned by individuals and corporations).

Source: Experian, August 2005; based on data sourced from National Statistics

5.2.2 Forecast shifts in patterns of employment

Total employment in Sport and Recreation grew by 4.1 per cent over the last five years (Table 2.2), slightly faster than Active Leisure and Learning and over four times as fast as in the whole UK economy.

While this growth will slow over the next ten years, the trend of higher growth than for both Active Leisure and Learning and the whole UK economy will continue.

Table 5.2.2 a) Employment growth in Sport and Recreation in the UK

(Average annual growth, %)	1999 to 2004	2004 to 2009	2009 to 2014
Active Leisure and Learning	3.9%	2.1%	1.4%
Sport and Recreation	4.1%	2.5%	2.0%
Whole Economy	1.0%	0.6%	0.4%

Source: Experian, August 2005; based on data sourced from National Statistics

89 per cent of workers in Sport and Recreation are employed, while 11 per cent are working on a self-employed basis, which is similar to the all UK percentage of 13 per cent. Over the next ten years, there is expected to be little change in the profile of the Sport and Recreation workforce. Employment in the sector will continue to be dominated by employees, as self employment in the sector grows at a marginally slower rate than employees in the future.

Part-time work is significantly more important in Sport and Recreation at 47 per cent than it is to the whole UK, at 22 per cent in 2004. Over the next ten years those working on a part-time basis will continue to exceed those employed full-time in sport and recreation although the difference between part time and full time employees does narrow.

The ratio of males to females in 1995 was 52 males: 48 females however in 2004 it is females that are in the majority (46 males: 54 females) and this disparity will widen to 42 males: 58 females by 2014.

Table 5.2.2 b) Male : female ratios

Sport & Recreation	1995	2004	2014	Average Annual Growth 1996 - 2004	Average Annual Growth 2005 - 2014
Total Employment	271,000	363,000	459,000	3.3	2.4
Employees	239,000	324,000	410,000	3.4	2.4
Male	124,000	150,000	174,000	2.1	1.5
Female	115,000	174,000	236,000	4.7	3.1
Part Time	125,000	172,000	212,000	3.6	2.1
Full Time	114,000	152,000	199,000	3.2	2.7
Self Employed	32,000	39,000	49,000	2.4	2.3

Source: LFS

Changing occupational structure

The occupational profile of the Sport and Recreation sector will not change dramatically, as all occupations grow at a positive rate. Overall the Sport and recreation sector is predicted to require 96,000 additional workers by 2014.

5.2.3 Trends in replacement demand

In addition to labour demand stemming from expansion of Active Leisure and Learning, employers in the sector will also require staff to replace those who leave.

Recruitment to satisfy staff churn is known as replacement demand and Table 5.2.3 details the extent of replacement demand expected in Active Leisure and Learning, and its composite sector.

Over the next five years, the Active Leisure and Learning sector will require an additional 85,000 workers. Sport and recreation will require 68 per cent of this total, equivalent to 57,470 workers.

Workers switching occupation will cause the majority of churn, although other reasons such as leaving to become a student or to look after family are also important. Retirement is the least significant cause, with only 6,200 workers forecast to retire from the Active Leisure and Learning in the UK between 2005 and 2009, reflecting the relative youth of the workforce.

Table 5.2.3: Replacement demand in Active Leisure and Learning in the UK

(Average annual 2005 to 2009)		
	No.	% of total replacement demand**
Total replacement demand		
Sport and Recreation	57,470	100%
Reason for turnover		
Switching occupation	47,270	56%
Move into unemployed	10,895	13%
Retirement	6230	7%
Other Reason*	20,240	24%
* Includes leaving to become a student; becoming a Government trainee, leaving to look after family, and becoming otherwise inactive. ** Sub sector percentages will not sum to 100 due to overlap of footprints.		
Source: Experian, August 2005; based on data sourced from National Statistics		

5.2.4 Skills Needs

Table 5.2.4 presents skills needs in the Active Leisure and Learning sector ranked in descending order of need, based on the LSC National Employers Skills Survey by occupation for England. This highlights communication as the most highly valued skill by Sport and Recreation employers in the UK. A mean score of 2.2 illustrates that employers regarded a high level of this skill necessary. Customer handling and team working skills closely followed this. Foreign language skills scored the lowest, only being required at a basic level.

Translating expectations for future growth into future skills needs, the scores for all skills are forecast to fall by 2006, showing that all skills will be required at a more advanced level. The largest increase in score is seen for general IT user skills, indicating a large rise in the use of IT systems in the sector. Management skills and technical skills are also required at noticeably higher levels. While the demand for these skills will increase the most, they are still not needed at as high a level as communication, customer handling and team working skills.

Table 5.2.4 Skills Needs in the Sport and Recreation sector, UK

(Mean Score* of skills required to do job)		
	2003	2006
Communication skills	2.2	2.1
Customer handling skills	2.2	2.1
Team working skills	2.2	2.2
Technical and practical skills	2.7	2.6
Problem solving skills	2.7	2.7
Literacy skills	2.8	2.7
Numeracy skills	2.9	2.9
Management skills	3.1	2.9
General IT user skills	3.8	3.6
IT professional skills	4.2	4.1
Foreign Language skills	4.7	4.6

* For all skills the mean score is calculated by multiplying the number of establishments citing each level of skill needed and the value of each level of skill, summed and divided by the base number of establishments. The value of the level of skill equals 5 when not required through to 1 when advanced.

Source: Experian, August 2005; based on data from the National Employer Skills Survey 2003

5.2.5 Future sector scenarios

Future sector scenarios are reported on in more detail in The Future for Active Leisure and Learning – UK and England, and are also covered in chapters 3, 4, 5.

5.2.6 Key Occupations and Skills Matrix

This section demonstrates the key skills and experience required for the main range of occupations found within the each sub-sector. Nonetheless the concept of 'core' occupations is essential: the occupations which are mainly responsible for delivering the service, and without whom the sector could not function:

All these roles rely on industry-specific technical qualifications, but few of these key vocational qualifications receive public funding:

Sport and Recreation

- Recreation staff – 'Statutory training': NPLG for lifeguards, first aid, health & safety
- Coaching - NGB Level 1 - 4
- Officiating - NGB Level 1, 2 or 3
- Degree for Sport Development

- Management - Professional bodies: ILAM, ISRM
- Community / Junior Sport Activity Leader Award (CSLA / JSLA

5.2.7 KEY OCCUPATIONS AND SKILL MATRIX - SPORT and RECREATION - ENGLAND

ENGLAND	**Coaching**	**Officiating**	**Sport Development Officers**
Example roles	Level 1 – 4 Paid and Voluntary	Level 1- 3 Paid and voluntary	SDOs –Mostly LA roles / some University, some Public sector (CSP) 9 active sports / funded and / or wealthy
Experience	Of the sport or coaching		
Generic skills St John's – 'problem raising the bar'	Communication Organisation Leadership Health & Safety First Aid Child Protection "How to" Coach knowledge (physiology, psychology) How sport works – the system Ethics and equity	Working with people / team work Communication (1st Aid) Health & Safety Child protection Governance – Rules and regulations Exercise Authority	All cited to the left Knowledge / group / community / employer's agenda
Technical skills	Sport specific skills + knowledge Methods of delivery Performance / Development / Quality UKCC has funding until 2007 31 sports common	Knowledge of NGB rules + roles Sanctions and disciplinary actions International Federation rules	Partnership skills – Listening, negotiating, advocacy, knowledge of sport (NGB)
Qualifications	NGB Level 1, 2 or 3 NVQ / VRQ Degree (not sport) / Diplomas UKCC International Federation (IF) e.g. RYA / PADI	NGB + International Federation VRQ in → Stewarding	Some degree / diploma NGB Sport specific (not all) Experience commitment
Typical sources for recruits	Players, ex-players and competitors Parents	Players, ex-players and competitors	University graduates
Training programmes	As above	As above	As above

ENGLAND	**Event Management**	**Management + Admin NGB / LA / Regional**	**Group or Activity / Client Leadership**	**Governance**
Example roles	Stewards etc. (often agency or contract) e.g. Athletics - large ad-hoc events, National Championships etc			Treasurers Trustees / Board members NGB → Clubs Or Community groups
Experience	Yes	Yes	Yes	Yes
Generic skills	As before, plus Safety management Finance Management Fundraising Media Relations Human Resources	Management + Leadership + Specialisms HR / Marketing	Group dynamics Leadership Organisation Working with people HR Equity Child protection Client knowledge Team building Problem solving	Guardianship of delivery of sport Serving membership Accountability for discipline, rules, Representation / lobbying/ advocacy International, domestic Reputation Management skills Policy & strategy Regulation – participation, coaching accreditation
Technical skills	Project Management Sport Knowledge Knowledge of locality / traffic management Managing officials	Sport specific programme management Facility management Project management	Negotiating Building confidence Specific knowledge of activity Knowledge of conditions + terrain, (Mountain Leader Training Board)	Sport specific implementation Implementing IF IOC rules & procedures
Qualifications	VRQs in stewarding Qualifications depending on individual roles	Professional bodies – ILAM, ISRM CIPD (HR qualification) MBA NEBS (NVQs) National Enterprise + Business	LEA endorsed CSLA / JSLA (Community / Junior Sport leader Award BELA MLTB – as above NGB Leadership awards	
Typical sources for recruits	Sport or other industries	Sport or other industries	Players, ex-players and competitors Parents	Players, ex-players and competitors
Training programmes	As above	As above	As above	

ENGLAND	Maintenance / ground staff	Operating staff	Bar / catering
Example roles	Green keeper, Wicket keeper		
Entry level			
Experience			
Generic skills			
Technical skills	Functional specialism		
Qualifications	NEBS Institute of Groundsmen COSHH General trade qualifications		
Typical sources for recruits			
Training programmes			

5.2.8 OCCUPATIONS AND SKILL REQUIREMENTS – SPORT and RECREATION - SCOTLAND

SCOTLAND	Occupation 1	Occupation 2	Occupation 3	Occupation 9
Job Titles	Lifeguard	Leisure Attendant	Coaches/Instructors	Gym Coach
Entry level requirement:				
• Experience required	Need to possess qualification and preferably on-the-job experience	Very little experience	Direct on the job experience and qualifications	Depends on level. Entry level requires little experience as they will receive training
• Qualifications	Relevant Lifeguard qualification (NPLQ) and first aid	none	Relevant NGB award	YMCA fitness
• Skills	Communication, Problem Solving	Basic literacy & numeracy Cleaning, communications and setting up/dismantling skills	Working with people	Communications, teamworking, communications
Typical sources for recruits	Recruited through newspaper adverts. Need qualification to apply	All sectors and Job Centres etc		Governing Body sources
Training programmes	Induction training, statutory training - NNLP	Induction training and statutory training	NGB Level 2 / 3	Level 2
Skill Supply	ok	low	low	Low

SCOTLAND	Occupation 5	Occupation 6	Occupation 7	Occupation 8
Job Titles	Managers	Duty Managers	Receptionist	Crèche attendant
Entry level requirement:				
• Experience required	Experience of industry and management	Experience of industry and management	General work experience	Previous experience essential
• Qualifications	Degree	Sector relevant diploma	Admin qualification or experience	Childcare, NESPC and First Aid
• Skills	Communications, people management, leadership, business skills	IT, communications, resource management, teamworking	Communications, teamworking, customer service, keyboard	Customer care, teamworking, communications
Typical sources for recruits	Trade press, newspapers and internal adverts. People will generally come from the industry	Trade press, newspapers and internal adverts. People will generally come from the industry	Internal/external to the sector	Trade press, newspapers and internal adverts. People will generally come from the childcare industry
Training programmes	Business Leadership and Management Finance Marketing Project Management	Management Health and Safety Leadership Customer care Dealing with conflict Child protection	Customer care Teamworking IT	Playwork Health and Safety Child Protection
Skill supply	low	low	ok	

SCOTLAND	Occupation 9	Occupation 10	Occupation 11	Occupation 12
Job Titles	Active schools co-ordinator	Community Recreation Officer	Sport Development Officer	Volunteer Development Officer
Entry level requirement:				
• Experience required	Minimum 1 year experience in full time employment. Experience in sport and education		Knowledge of relevant sport and experience of working in a role within that sport	Voluntary experience
• Qualifications	Relevant degree	HND/Degree in leisure/recreation	Relevant NGB award and possibly degree	Relevant degree?
• Skills	Project management, teamworking, communications, knowledge of 5-14 curriculum, budget management, community capacity building, partnership working, teamworking, IT	Communications, teamworking, community partnerships	influencing, negotiation and relationship management skills	Knowledge and experience of volunteering and volunteer roles in sport. Require communications, planning, evaluation, IT, presentation and training delivery skills.
Typical sources for recruits	Trade press, newspapers and internal adverts. People will come from education and sport sectors	Newspapers and internal adverts	External and internal adverts	
Training programmes	Partnership working Recruiting and managing volunteers, sourcing funds, negotiating IT, Communication	Social inclusion, sourcing funds, partnership working, groupwork, communication and negotiating. Report writing	Sourcing funds, partnership working, communication, project management, leadership and management, finance, analysis and evaluation	Recruitment and management of volunteers, partnership working, project management, influencing, sourcing funds, report writing
Skill supply	low	ok	Low	Can be difficult getting the right person

5.2.9 OCCUPATIONS AND SKILL REQUIREMENTS – SPORT and RECREATION - WALES

Occupation	Skills - Technical	Skills - Generic	Qualifications
Lifeguard	NPLQ National Pool Lifeguard Level 1 and 2 ASA Teaching NARS	First Aid Customer Care	NVQ Level 2
Coaches / Mentoring	Levels 1-5 and Preliminary Coaching UK Coaching Certificate	Communications Management Media First Aid Customer Care	
Professional Player	Skills in particular sport Rules of Governing Body	Media Skills Lifestyle Support I.T	
Managers		People Skills Finance H.R. etc	ACMA, ACCA,
Development Officer	Coaching	Communication Organisation Managing conflict Interpersonal Planning Leadership IT Skills Community Development Experience	Coaching – Level 3 coaching certificate Post and undergraduate sport related degree
Teaching / Lecturing / Tutors	Teaching Stages 1-3 ASA	Communication Management First Aid Customer Care	NVQs
Officials / Referees	Law of the Sport	Management	Linked to sport

		Communication	
Maintenance	Electrical Mechanical	Customers Needs Time Management	
Ground Staff			NVQs Green Keeping
Marketing	Marketing PR Sponsorship	Commercial Experience	Sports Marketing Modules Marketing qualification
Volunteers / Club officers e.g. board of trustees / treasurer	Demonstrate financial experience and credibility	'Thick skin' Presentation skills Organisational skills	Book-keeping Financial qualification
Volunteer co-ordinator / manager	HR	Succession Planning People Focused Communication Persuasion	Volunteer management courses? HR / CIPD
Psychologist	BASES	Interpersonal skills Counselling Report Writing Communication	Degree in Psychology
Catering		Food Hygiene	
Stewards / Marshalls	Crowd Control Health and Safety	Conflict Management Self Defence	
Recreational Assistant	Coaching GP Referral Courses		

5.2.10 OCCUPATIONS AND SKILL REQUIREMENTS – SPORT– NORTHERN IRELAND

Occupation	Skills- technical	Skills – generic	Qualifications
1.Governing Body Professions Staff	Planning, Finance, Marketing	Management Skills	Formal Management Qualification & Sports Experience
2.Community Sports Coaches	Multi Sports Coaching Qualifications	Community Development	L 2/3 Coaching Qualifications
3.High Performance Coaches/Managers	Coaching, Performance Sport	Experience with High Performance Athletes	L 5 Coaching Qualifications
4.Sports Scientists	Applied Skills to High Performance Sport	Working with High Performance Athletes	Degree in Sports Science

Occupation	Ideal Education	Ideal Level Of Qualification
Coach	SFA Leaders GCSE English/Maths	Modern Apprenticeship / NVQ Levels / HND GB Qualification UKCC – Level 2
Sport Development Officer	Degree &/Or Vocational Experience	Sports Development Degree & Placement Year I.T Literate (Ms Applications)
Community Sport Development officer	Degree &/Or Vocational Experience With Community Perspective Level 3– Sport / Educ / Community Dev / Sociology	As Above With Community Emphasis. Ideally Placed In Community For 1 Year Level 3
G.B. Development Officer		Top Level In Sport (Level 4/5) & Tutor / Assessor Qualification
Leisure Assistant	RLSS Pool Life Guard Swimming Teachers Qualification.	Working Towards Qualification In Leisure

6. Geographic perspectives

6.1 England

6.1.1 Composition of the sector

Sport and Recreation contributed £4.4 billion in Gross Added Value Output to the England economy in 2004, 61 per cent of the total for Active Leisure and Learning, according to Experian Business Strategies. The sector has grown almost twice as fast as as the whole England economy since 1999 (at 5.7per cent compared to 2.8 per cent), and despite a predicted slowdown it is forecast to continue to outperform the economy average.

6.1.2 Employment

Sport and Recreation employment totals 303,000, accounting for 63 per cent of all Active Leisure and Learning employment. Employment grew by 4.5 per cent over the last five years compared to just one per cent for the whole England economy. While growth is forecast to slow, it is still expected to grow 3 times faster than the England average until 2014.

6.1.3 Replacement demand

Replacement demand estimates reckon the sector will need to find 48,000 worker to replace those in existing jobs in addition to demand generated by growth.

6.1.4 Skills in the workforce

Many of the targets set for sport to meet government agendas could be described as 'soft targets' and some participants in our Sport Visioning Workshops questioned sport's ability to deliver against these targets. While sport is a great social equalizer, some were wary of coaches taking on responsibilities for social welfare, and many identified additional skills needs in dealing with disaffected youngsters. The workforce has traditionally been hired based on their own performance or involvement in sport, and require up-skilling to meet the demands of the future workforce.

Some observed a potential issue with primary school teachers' skills and expertise within PE. A concern was expressed that the remodelling of teacher workforce may lead to the classroom assistant taking responsibility for PE – for which they would require training.

6.1.5 Volunteers

As we saw earlier Sport is highly dependent on volunteers, many of whom are only at Level 1. The sector faces a huge challenge in funding the training for volunteers, which is largely funded by Sports Clubs or the volunteer themselves at present. Time availability is also a barrier for volunteers particularly those who are employed in full time jobs in other sectors. Finally the sector fears the loss of voluntary effort if the enjoyment and reward of the role diminishes with increasing bureaucracy or the fear of litigation.

6.2 Scotland

6.2.1 Composition of the Sport sector

Gross value added output for Sport and Recreation in Scotland is £480 million, equivalent to 0.6 per cent of the whole Scotland economy. Sport has accounted for the largest proportion of the Active Leisure and Learning output at 61%. While Sport and Recreation's growth over the last five years has been below the sector average at 2.6 per cent compared to 3.2 per cent, it has still outperformed the Scotland economy at 1.8 per cent. It is forecast to slow slightly, and is expected to match the Scotland average annual growth rate of 2.2 per cent by 2014.

6.2.2 Employment

A total of 34,320 were employed in the Sport and Recreation sector in Scotland during 2004. This accounts for 9% of the UK Sport employment, making it the largest contributing nation after England. Sport employs the largest proportion of Active Leisure and Learning workers at 65 per cent. Growth in employment has presented a similar picture to output: over the last five years it has under performed the sector as a whole at 2.3 per cent compared to 3.3 per cent, but has grown almost 3 times faster than the Scotland economy at 0.8 per cent. Employment growth is set to increase by an average of 2.7 per cent per annum until 2009 before slowing until 2014.

6.2.3 Recruitment

Recruitment practice depends on the level of the job, with newspapers, job centres and the internet providing useful sources for the lower level jobs, and trade press of NGBs being more helpful for senior roles. The key 'hard to fill' jobs identified in our Sport Visioning Workshops include Leisure Attendants, Coaches and Administrators, especially in rural areas where property prices and transport are expensive.

Difficulty was voiced in attracting adequately skilled people at all levels.

> *"Aging population and low unemployment makes it difficult to recruit to the industry* - Midlothian Council

6.2.4 Skills Needs

At lower levels, participants identified a significant gap in core employability skills despite recent investment. The Sport sector requires a wide range of core skills, with Managers needing a broad portfolio of skills, including business and core skills. There was a perception that a massive gap existed between public employees' skills and volunteers' skills. The UKCC will undoubtedly be key in providing skilled professional coaches, but there is still a challenge in updating the skill set of existing employees in other occupations. Employers observed that 75% of training budgets are currently spent on providing statutory skills like first aid, lifeguarding and health and safety requirements, leaving little additional resource for core skill development.

Key Skill Impacts in the Sector in 2015

- People skills far more important
- Industry can meet expectations of potential employees
- More sport specific development officers
- More commercial approach to management
- Core/generic skills key
- Skillset mirror private sector
- Flexibility and adaptability

6.3 Wales

6.3.1 Composition of the Sport sector

Gross value added output for Sport and recreation in Wales equalled £200 million, representing half of the Active Leisure and Learning contribution to the Wales economy, or 0.5 per cent of the Wales economy. Growth in output over the last five years has been slow at 1.7 per cent compared to the Wales economy at 2.6 per cent. The Active Leisure and Learning sector has performed better overall, largely due to increased output from the Caravan Industry, the Outdoors and Playwork. Sport is forecast to pick up over the next five years, but will slow down to its current growth rate thereafter.

6.3.2 Employment

Sport and Recreation employs 15,000 workers in Wales, which is just over half of the Active Leisure and Learning sector as a whole. Average annual growth in employment has been slowest within Sport and Recreation sector over the last five years at 1.5 per cent. Reflecting the forecasts for output, this is expected to rise to 2 per cent over the five years to 2009, and fall dramatically to 0.4 per cent per annum until 2014.

6.3.3 Recruitment

Employers reported a general feeling that recruitment of managerial level staff is difficult across Wales. Related to this was a feeling that too many graduates are leaving further and higher education with the wrong skills. Many graduates also have high expectations of being able to secure managerial level posts, when operational experience is often a basic entry level requirement.

A number of major employers in Wales (primarily public sector) are 'fishing from the same pool' in terms of recruiting people. Employers in Wales noted that there are so many Sport & Rec related qualifications available, examination of topic areas/course content is essential as titles can sometimes be misleading.

There was a general feeling amongst employers that there is a strong supply of high calibre people available for Sports Development roles with a healthy level of competition. Leisure related posts however are far more difficult to recruit for.

Local authority employers reported a trend in lifeguards regularly moving on to work for police or fire authorities. Internal career progression and pathways an important means to ensure retention after recruitment. The term 'grow your own' was used.

Internal and external advertising is frequently used by the public sector – but within continually diminishing budgets. Networking is an important route to meeting and potentially headhunting prospective candidates. Open nights are used as a means of attracting potential candidates, and there's a growing trend to employ initially on temporary contracts.

6.3.4 Volunteers

Recruiting for voluntary posts is becoming more difficult as time demands and requirements increase. Key developments need to include better co-ordination and more formal management of the volunteer base by lead agencies/governing bodies. Coaching in particular was highlighted as a serious area of concern in terms of lack of volunteers coming forward (Many coaches are actually volunteers).

'Word of mouth' was mentioned as being a particularly important way of recruiting volunteers.

Some key points were raised including the importance of engaging and recruiting third age volunteers. CRB checks, insurance requirements and training requirements are also seen as barriers to recruitment.

There was a consensus view that the role of volunteers needs to be formalised with better management and co-ordination. This should result in better recruitment and reliability of volunteers.

Concerns were voiced that bureaucracy and procedural issues are becoming increasingly restrictive to the volunteer base in Wales. Child protection protocols, health and safety and the 'ambulance chasing' claim culture were all mentioned as examples of concerns in recruiting and maintaining a vibrant volunteer base.

6.3.5 Skills

Basic Skills

There were differences of opinion regarding basic skills. Some felt that basic skills are essential for safety reasons (example of administering medicine was used). Others felt that basic skills could be included as part of Continuous Professional Development (CPD) and that the employees' ability to conduct tasks properly is the paramount consideration.

Several employers noted that assessing basic skill levels can be difficult. It was also noted that staff with basic skills deficiencies may be more inclined to conceal problems for fear of embarrassment rather than reveal them.

Technical Skills & Qualifications

A general consensus emerged that skills and qualifications requirements are naturally specific to certain roles. There was a strong feeling however that generic skills (such as communication and customer care) are the most important (more important than basic skills and technical skills).

"*We can always add technical skills and experience – but the softer interpersonal abilities of a person are crucial right from the outset*". (Local Authority)

There was a consensus feeling that there needs to be an increased role for CPD assessors and more attention needs to be given to identifying essential and desirable skills when formulating job specifications.

Whilst in general, the UK Coaching Certificate was welcomed as a positive step, it was emphasised that this should not cause an additional barrier to recruiting volunteers (as a result of increased time, bureaucracy and cost issues).

"*Implementation of the UKCC needs to be slick and effective*" (WCVA)

6.3.6 Participation targets

Participants in our SSA Visioning Workshops were optimistic about the Sport and Recreation sector in 2015, believing Wales will maximise the opportunities from the 2009 Ryder Cup and

2012 London Olympics and will have become rugby world champions. These are expected to have a huge impact on motivation to get involved in sport in Wales.

"*By 2015, we'll have achieved 30% more participation in Sport & Recreation activities and have the highest participation levels by young people on a ward by ward basis across the UK*". (South Wales Local Authority)

WAG is helping to raise the profile of Sport and Recreation in the context of health and education. The sector in Wales is working in partnership to deliver shared agendas (e.g. between Local Authorities and with Sport Council for Wales), which is increasing the level of choice and introduction of new activities.

The facility base in Wales is considered a strength, although concerns exist over quality and usage levels, and new initiatives such as Free Swimming Initiative (FSI) have been successful.

There is a concern about the burden and over-dependence placed on the on voluntary sector being sustainable, coupled with an aspiration that the Sport and Recreation industry in Wales will enjoy a professional and properly rewarded volunteer base in future.

6.3.7 Funding

Concerns were raised in our SSA Visioning Workshops regarding lack of funding for some key areas which need investment (both physical e.g. Swansea Leisure Centre and human investment), and lack of cross border co-operation in some areas of Wales causing unnecessary local duplication, and added bureaucracy. There was a perception of a lack of pace in general in Wales in responding to new trends and opportunities.

Availability of public funding did not seem to be linked to clear strategic priorities, and the sector would welcome increased spending commitments by central and local government resulting in larger public sector sports and recreation departments in local authorities.

Funding insecurities can cause difficulties in sustaining activities and retaining staff (e.g. specific project funding 1-3 year lifecycles) resulting in a high level of staff turnover. Many felt there was possibly a lack of understanding by WAG as to nature and intricacies of the Sport & Recreation Sector and its potential wider implications/impact.

6.3.8 Funding for training

Employers felt that Wales is very bureaucratic, slow and risk averse in terms of strict eligibility criteria for training courses.

"*Learning and Skills Councils (LSCs) in England are much more flexible and prepared to take risks on supporting new and innovative training initiatives. This is causing a very uneven playing field across the UK*". (WRU)

Linked to the funding issue was a frustration related to the amount of money being allocated through 'topslice' to FE and HE courses in Wales that are of limited relevance and are generating an over supply of graduates in specific areas, like sports development.

"*We need to see a strategic review of how existing funds are allocated in Wales with a view to making provision more employer focused and demand related*" (Sports Council for Wales)

Escalating costs were a key concern especially regarding training, and there were particular concerns about barriers to training for volunteers, which chiefly comprise cost and long distance travel.

6.3.9 Quality of training

Employers noted the importance of consulting with and identifying employer needs before developing and deploying training provision. This needs to be reflected at a national policy and strategy level by WAG and governing bodies.

It is crucial that generic skills are integrated as core modules/themes within courses designed for Sport & Rec industry (Cross Sport generic modules).

"*We need for things like customer care courses to be relevant to Sport & Recreation*". (Local Authority)

Courses need to be linked more closely with operational experience in the field, giving graduates a better opportunity to apply for managerial type roles earlier in their careers.

6.3.10 Accessibility of training

- Our SSA Visioning Workshops expressed concerns about quality assurance of training and qualifications in Wales, concluding there was too much choice. Employers felt that this needs to be considered as a priority in merging ELWa into WAG. A lack of co-ordination often means that employers are forced to use providers in England with increased costs.

"*Lack of co-ordination, flexibility and attitude to risk means that we are falling further behind England and its LSCs*".

- A common and consistent qualification framework should be in place at a UK level.
- A rationalisation process needs to occur, linked to quality assurance priorities.
- Employers suggested that a comprehensive audit could be carried out of all providers in Wales with a subsequent accredited list being made available
- Wales needs to be much more astute in maximising economies of scale and better co-ordinating local training provision.

"*We need to level the playing field with England and make qualifications instantly recognisable currency*". (WRU)

Partnership working and strong leadership by governing bodies will be essential in making this happen.

6.4 Northern Ireland

6.4.1 Composition of the Sport sector

Gross value added Output for Sport and Recreation in Northern Ireland was £121 million in 2004. This represented 63 per cent of the whole Active Leisure and learning contribution to the economy. Sport has performed slightly better than the Wales economy over the last five years at 3.3 per cent compared to 2.8 per cent, on a par with the sector as a whole, but below the Outdoors and the Caravan Industry. It is forecast to grow marginally over the next five years, and decline for the five years to 2014.

6.4.2 Employment

A total of 10.490 people were employed Sport in Northern Ireland in 2004, representing 64 per cent of the whole sector. It has enjoyed the highest growth rate in the Active Leisure and Learning sector over the last five years at 4 per cent, more than twice the economy average of 1.8 per cent. However, this growth rate is predicted to halve for the next five years to 2009, and almost halve again until 2014. Nonetheless it will continue to outperform the Northern Ireland economy growth rate during the next 10 years.

6.4.3 Government drivers

It's not surprising that government drivers differ, and sports and education policy in Northern Ireland are covered in section 2.3.4. The Sports Minister for Northern Ireland, David Hanson MP, has recently announced the establishment of a steering group to draw up a new Sports Strategy for Northern Ireland to span the next 8 to 10 years. A Five Year Physical Activity Strategy and Action Plan for Northern Ireland (announced June 2004, by the Department for Health, Social Services and Public Safety), aims to promote the benefits of regular physical activity and to encourage everyone in Northern Ireland to participate in daily activity. The strategy recognises that there is a need to improve knowledge and skills in order to support the overall aim.

The Department for Employment and Learning, Skills Strategy for Northern Ireland 2004 recognises that in order to deliver a world-class workforce, investment must be well focused to deliver the skills required.

Participants in the SSA Visioning Workshops for Northern Ireland shared the view that government policy was a key driver of the sector in relation to Health & Safety Legislation, Disability Discrimination Act. A particular issue faced in Northern Ireland concerned opening hours, since many leisure facilities are forced to close on a Sunday.

Several workshop attendees also felt that political decisions in Northern Ireland were often based on vying for power rather than for the good of the sector.

" Too many decisions are made on green and orange bias"

Several participants in the SSA Sport Visioning Workshops

Other particular issues affecting the delivery of sport and leisure services in Northern Ireland involve the newly introduced water charges in the province. As we saw earlier, fuel costs have a major impact on the provision of leisure facilities with swimming

" We have experienced a 50% price increase for our swimming pool" (Lisburn City Council)

pools, and some Local Authorities have experienced substantial cost increases as a result of water charges as well.

6.4.4 Recruitment

Northern Ireland has seen an increase in Sports Development posts, which have a wide remit and require a variety of skills. The trend for fixed-term contracts for these posts (typically 3 years) was considered detrimental as SDOs tend to move after two years, leaving a hard-to-fill vacancy.

Many attendees felt that there was an overall need for salaries to reflect the professional status of the sector to avoid losing staff to higher paid / lower skilled jobs.

6.4.5 Skills Needs

The key occupational skills were identified as customer care, adaptability and 'multi-tasking' (e.g. the ability and willingness to undertake tasks ranging from cleaning equipment to completing funding applications).

There was very strong agreement that new employees and graduates into the sector lacked generic job-specific skills, in particular in the areas of letter writing, telephone and communication / interpersonal skills. Further, the key skill drivers for the sector were identified as IT literacy (in Microsoft applications), disability awareness, GP Referral and language skills for the increasing migrant population.

Skills issues in the future
It was also noted that the political climate in Northern Ireland called for the development of bespoke communication skills, in particular when dealing with the sensitivities of segregated communities.
The sector representatives felt that the introduction of the UKCC (UK Coaching Certificate) would have a positive impact on the future of the sector in terms of improving skill levels. In addition, it was felt that there would be an increase in the number of private sports clubs and an increase in the number of personal coaches, which would have a subsequent effect on the skill requirements of future workers.

It was also stressed that the future recognition of volunteer skills was important and necessary for the growth and prosperity of the sector.

Missing Skills
- Sports science
- Risk assessment
- Environmental control
- Time management
- Financial management
- Understanding of individual and disability needs
- General lack of necessary job skills among applicants (e.g. letter writing & telephone/ communication skills)
- Qualifications often not relevant to vacancies
- Education sector not servicing the industry

6.4.6 Funding and training

Participants in the SSA Visioning Workshops expressed an interest in a fundamental review of education and training to adequately map skills required. Additionally, they identified the following:

- A need to explore FE College links with NGBs as a means of sustaining future training provision.
- Some training is only available on the mainland.
- NOF funding is allocated to projects which should be regarded as mainstream.
- Specific reference was also made to extending the length of the Enterprise Ulster Apprenticeship training scheme, as 6 months was not considered sufficient.

7. Priorities

7.1 Participation

The key to ensuring success in Sport and Recreation is increasing participation to meet overall government targets, and specific participation targets linked to funding for individual sports or target groups, like teenage girls. It is important for the sector to promote physical activity in general and one of the drawbacks of individual sport funding is the resulting fragmentation of the promotion of sport with a consistent and sustainable message. Individual sports will have promotion initiatives, which may be conducted locally or nationally, but the sector identified the 2012 Olympic Games as an opportunity for a coherent government-funded promotion of physical activity.

Consumer spending and increased leisure time are also identified as key drivers to participation levels, which might be under threat if there was a downturn in the economy. The sector aims to promote participation in, and expenditure on sport as 'essential' rather than 'luxury' spend.

Section 4.3.9 explored the cost structure of sports operations in both the public and private provision. Public sports clubs are largely dependent on public investment usually from Local Authorities to finance the provision of sports facilities, and increases in charges for 'pay-to-use' facilities usually result in lower participation levels, either as reduced frequency of visit, or more worryingly, reduced numbers of participants who are harder to attract back. Private clubs are largely dependent on 'exchequor' funding, membership fees, bar receipts and fundraising, so there can be an equally inelastic relationship between price and participation.

7.2 Attractiveness of the Sector

Sport and recreation has a certain appeal to younger people in particular. The sector offers the opportunity to work in relatively autonomous roles, with a relative amount of freedom from 'sitting behind a desk'. Many of those attracted to the sector are likely to have strengths in physical pursuits rather than academic interests who would find the nature of the sector more appealing.

However, Sport and Recreation does not offer high remuneration for these coaching or instructing roles. Furthermore, these jobs can be a major commitment in terms of the number of hours required, and the fact that those hours often involve unsocial shifts, covering evenings or weekends. Many end up leaving the sector, or starting to work on a self-employed basis because of the lack of prospects within the industry.

Pay and conditions are well known as a key factor in the lack of retention in the sector, with older workers seeking more highly paid jobs outside the sector once they reach the family stage in their lives. The sector should consider improving the competitiveness of pay, but the economic pressures on organisations which are reliant on government funding, or need to balance increased membership fees against decreasing member numbers are not to be underestimated.

Part time employment is proportionately higher in Sport and Recreation than full time work (53 per cent compared to 46 per cent of all employees in 2004) and this is likely to have a moderating influence on total pay. Sport and recreation is highly dependent on a volunteer workforce, and reports that many coaches are paid until the money runs out and subsequently work on an unpaid basis.

7.3 Career paths

One of the surest ways to improve staff retention is for the sector to offer clear progression routes or career paths within the sector. The skill set required for management progression is often quite different from that demanded for customer-facing roles, including a higher expectation for competent literacy, numeracy and IT skills. As we have seen throughout the report, organisations are required to fund 'statutory' or technical training to meet Health and Safety or other legislative and regulatory standards. The next priority from a business point of view is training in the 'softer' skills like communications and customer service, team building and problem solving, which impact most on customer satisfaction, and therefore on the bottom line.

7.4 Professionalism and upskilling

The sector recognises the increasing importance of professionalism, as evidenced by the importance of employing appropriately qualified and certified staff. In addition to providing the reassurance of a competent coach / instructor for customers or schools, having vocationally qualified workers can positively impact on an organisation's insurance costs. The challenge in Sport is with voluntary clubs and organisations funding training and membership fees for their volunteers. The MORI survey on sports coaching for sportscoach UK found that 70% of the general public would consider taking up a coaching course if the funding was made available.

Many of the National Governing Bodies of sport promote the interests of the sport, and also provide insurance cover for qualified member coaches or practitioners, although this may represent an additional annual premium for employers. This is arguably better accepted in Sport where most coaches will operate within a single sport structure.

7.5 Priority qualifications

Priority qualifications are classed as those qualifications required for core occupations in Sport and Recreation, from entry level Leisure Attendants to Sports Development Officers:

- Recreation staff – 'Statutory training': NPLG for lifeguards, first aid, health & safety
- Coaching - NGB Level 1 - 4
- Officiating - NGB Level 1, 2 or 3
- Degree for Sport Development
- Management - Professional bodies: ILAM, ISRM
- Community / Junior Sport Activity Leader Award (CSLA / JSLA

7.6 Funding for training

We saw earlier that sustainable funding is a major threat to the future provision of sport, recreation and play facilities by public, not-for-profit and voluntary organisations within the UK. This is a particular issue when it comes to the funding of training which is essential for the sector to operate according to legislative and regulatory requirements.

"We need to employ two shifts a day, seven days a week. If we can't find trained staff we can't open". Large multi sports chain

Our Visioning workshops with each sector identified the limitations of recruiting graduates into practical, customer-facing roles, where they are usually required to start at a relatively low level. While many in the sector recognise that a degree education is not necessarily intended to be vocational, there was a perception that students were not sufficiently well advised about their career options and preparedness for work, and that degree courses were not practical enough to be aimed at employment in the Active Leisure and Learning sector.

Even the graduates who find work in the sector (often as few as a third of those accepted onto related degree courses) will usually need appropriate vocational training to level 2, and /or first aid, lifeguarding etc.

As very few of the key vocational level 2 qualifications currently receive public funding, and up-skilling to level 3 is an even greater challenge. This places an unparalleled burden on sector employers, workers and especially the volunteers who receive no remuneration for their efforts.
Our visioning workshop participants believed the current educational priorities and targets for HE and FE are not correctly attuned to providing qualified workers for the Active Leisure and Learning sector.

Coaching is a key sector skill, and qualifications must be accredited, if not provided under the auspices on the relevant NGB, yet only 17% have achieved funding to date.
As SkillsActive was preparing this report, proposed changes in LSC Funding Priorities were published which promised to prejudice funding for sector training further still:

1. The 5% cap on franchising and partnerships threatens to block even this low level of existing funding (less than 1 in 6) for National Governing Bodies for sport coaching qualifications. Most NGBs which had to date received any funding for Coaching qualifications had been using partnerships as the main vehicle for delivery. It's worth noting that most NGBs considered that working in conjunction with FE Colleges for the desk part of the coaching course, with practical sessions at sport / outdoor centres could reduce course costs by up to 50%. SkillsActive is preparing an urgent paper on Coaching, highlighting this key sector skill and the threats this funding regime brings to sports like Rugby Football Union and Gymnastics.
2. Other priorities targeting more young people will restrict opportunities for returners and part timers who are vital to the sector:
    a. 19+ FE funding – 4% (06/07) – 3% (07/08)
    b. 500,000 fewer learning opportunities for adults
3. The increasing emphasis on longer courses will effectively restrict the opportunity to acquire appropriate vocational qualifications for the SkillsActive sector, which are typically delivered in 'bite-size chunks' appropriate to the sport in question.

7.7 UK Coaching Certificate

The UK Coaching certificate aims to provide increased coherence and consistency across sports coaching qualifications through the introduction of more generic modules. This should enhance the transparency and transferability of qualifications, providing additional quality assurance and support mechanisms for coaches. Sportscoach UK has development funding available for the 31 priority sports until 2007. There are concerns within the sector about whether this conversion can be achieved by 2007 for all the priority sports. Many observers have also commented on the growing divide between funded priority sports, and non-funded minority sports which also play a vital role in raising participation, and medal achievement.

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9. Annexes

1. Summary of research approach
2. Summary matrix of current skills needs based on UK employer skills surveys
3. Summary matrix of future skills demand (Working Futures 2)
4. Notes from qualitative workshops