

## FutureNow – Creative and Leisure Industries Training Council Industry Workforce Development Plan

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**Plan Details:**

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**Plan Title:** Sport, Recreation and Racing Industries Workforce Development Plan  
**Issue Details:** 2015  
**Approval Authority:** FutureNow Board of Management  
**Submission Authority:** FutureNow – Creative and Leisure Industries Training Council

**Approval:**

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**Approval Authority:** Chair of Training Council Board of Management

**Signature:**



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**Date:** 22 September 2015

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**Endorsement:** Department of Training and Workforce Development

**Signature:**

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**Date:**

## FOREWORD

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Employment opportunities within the sport and recreation sector are increasing as more people are encouraged to engage in sport and recreation for health, fitness, enjoyment and many personal and social benefits. However the sport, recreation and racing industries will have challenges ahead due to changing consumer expectations, participation patterns and the demographics of the Australian population. Access to current and accurate demographic data proves a barrier to quantifying the size of the sport and recreation workforce and its associated sectors, as evidenced throughout this report with much of the Australian Bureau of Statistics (ABS) data being from the 2011 census. Although some individual sport and recreation sectors will carry out their own demographic analysis, many smaller sectors struggle to quantify the breadth and scope of their workforce.

The Vocational Education and Training (VET) landscape is changing, with the biggest growth being experience in the VET in School's (VETiS) area as a result of the introduction of new Western Australian Certificate of Education (WACE) requirements. However this is also bringing with it a new set of challenges, as a number of sport and recreation RTO's auspicing with schools had significant areas of non-compliance in the 2014 TAC VETiS Strategic Audit.

The racing industry is facing challenging times ahead, with a number of key issues impacting on the potential for growth and sustainability of the industry. The biggest of these is the privatisation of the TAB which is being discussed and considered by the State Government for the 2015/2016 financial year. There are also questions around the viability of keeping, operating and maintaining existing racing infrastructure into the future; the ageing workforce and difficulties in attracting new workers to the industry; and the competition from other forms of entertainment and betting available to consumers. There has also been training delivery change with Polytechnic West ceasing delivery of the Farriery Apprenticeship in 2014, resulting in a South Australian based RTO beginning delivery from the 1<sup>st</sup> of January 2015.

The fitness sector in particular is experiencing a period of sustained growth, with the number of 24/7 gyms opening across WA steadily increasing. The popularity of the 24/7 gym model has come about as time-poor, shift and FIFO workers look for more flexible fitness facility options. The low cost structure of 24/7 gyms is offset by the "full service" health clubs providing an increased emphasis on customer service and a greater range of fitness and other services. Large numbers of students are completing Certificate III and IV level fitness qualifications, however the quality of some graduates entering the industry, specifically from fast-track courses, is of concern to the industry. A common challenge for the fitness industry is the retention of workers due to the physical nature of the work involved as well as differing work hours, and relatively low levels of pay. While there have been media reports of oversupply of fitness graduates, there is still a problem getting suitably skilled staff particularly in regional areas. Employment patterns show high numbers of self-employed and freelance workers on contract to the large gym and health club chains, necessitating small business skills to operate in such an environment. The use of new technology and fitness apps is also driving consumer and industry behavior and brings with it new skill and knowledge requirements.

The increased attraction of eco and adventure tourism and Australia's continued marketing as a nature tourism destination is resulting in an increased demand for outdoor recreation activities. However a major workforce development impediment for the outdoors sector is the current lack of VET training at a Certificate III and IV level, where the majority of skill and labour shortages exist. The challenge for the outdoors sector moving forward will be to ensure a training pathway for the large numbers of students who are undertaking Certificate II level training in schools, to encourage them to continue on to higher level qualifications. Combined with the addition of Outdoor Education to the national curriculum and to the WA Certificate of Education, the demand for trained staff to deliver these qualifications will also grow. However, this will only be supported if more RTO's take on the delivery of these qualifications.

Valuable steps forward have been taken by the sports industry in the roll out of individual sport Workforce Development Plans by JGC Group in a project funded by the Department of Sport and Recreation. The importance of good governance structures, and quality business practices is being recognized by the sports industry through a number of professional development workshops and training opportunities made available to them by the Department of Sport and Recreation. The new Perth Stadium at Burswood, due for completion by March 2018 will provide significant benefits to several sporting codes, the construction industry, tourism, spectators, major events and so forth. It will also provide significant employment in its construction and ongoing operation.

The growth in the awareness of the need for water safety has seen a large spike in the number of swimming coaches and instructors, and lifeguards employed in Western Australia. Due to the size of Western Australia, and the remote locations of many aquatic centres, ensuring access to training and up-skilling is a major priority for the aquatics industry. Without qualified staff for aquatic roles, there have been instances in the past where regional pools have had to close due to a lack of staffing. The Department of Education reports difficulties in attracting swim teachers to remote locations, which is resulting in a number of school students not having the opportunity to undertake swimming lessons – a potentially life-saving skill.

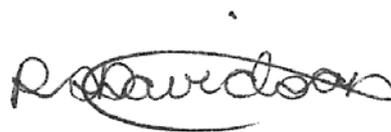
The ageing population, and growing obesity across all ages, is putting a renewed focus on sport, fitness and recreation activities as being vital to healthy living and offsetting huge demands and costs on the health and medical systems in WA.

Given the scenarios and challenges outlined, strategic workforce development, business and human resource planning is critical to the success and sustainability of the sport, recreation and racing industry sectors. The attraction and retention of staff; quality skills training and education; and increasing participation and productivity is essential to enable Western Australian sport, recreation and racing organisations to be sustainable and globally competitive.

This report is an organic document that will be continually updated, validated and improved. It will be circulated widely for stakeholder scrutiny and feedback and will be subject to continuous improvement to ensure timely quality input to Western Australia's annual workforce development and training strategies.



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## Overview

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### Issuing Authority

This plan is issued under contract between the Department of Training and Workforce Development and the Training Council in accordance with the requirements of Schedule 2 of the Service Agreement and is maintained by the Training Council.

### Aim

The aim of the plan is to outline industry workforce development trends, strategies and actions that provide high-level advice to the Department to inform future strategic directions and Skilling WA – A Workforce Development Plan for Western Australia.

### Objectives

The objectives of this plan are to provide the Department with:

- a Profiles for industry portfolios for the FutureNow – Creative and Leisure Industries Training Council such as:
  - I. Sport and Recreation
  - II. Racing
- b High-level state and national industry data and forward projections in regards to:
  - I. Economic trends and impacts on workforce planning;
  - II. Current and future labour market modeling consistent with information provided for the development of the State Priority Occupation List (SPOL);
  - III. Regional variations that may affect workforce planning;
  - IV. Training and education including VETiS;
  - V. Industry critical aspects that may impact on future planning.
- c Identification of issues that impact on State Workforce Planning and that inform and are linked to Skilling WA strategies.

These objectives are established so that effective development of workforce planning in regions and at State level can occur.

## SECTION 1 EXECUTIVE SUMMARY

### Industry Sections and Training Packages

#### FutureNow Creative and Leisure Industries Training Council

##### Industry Sectors

- (a) Fitness
- (b) Sport
- (c) Community Recreation/Aquatics
- (d) Outdoor Recreation
- (e) Racing

##### Training Packages

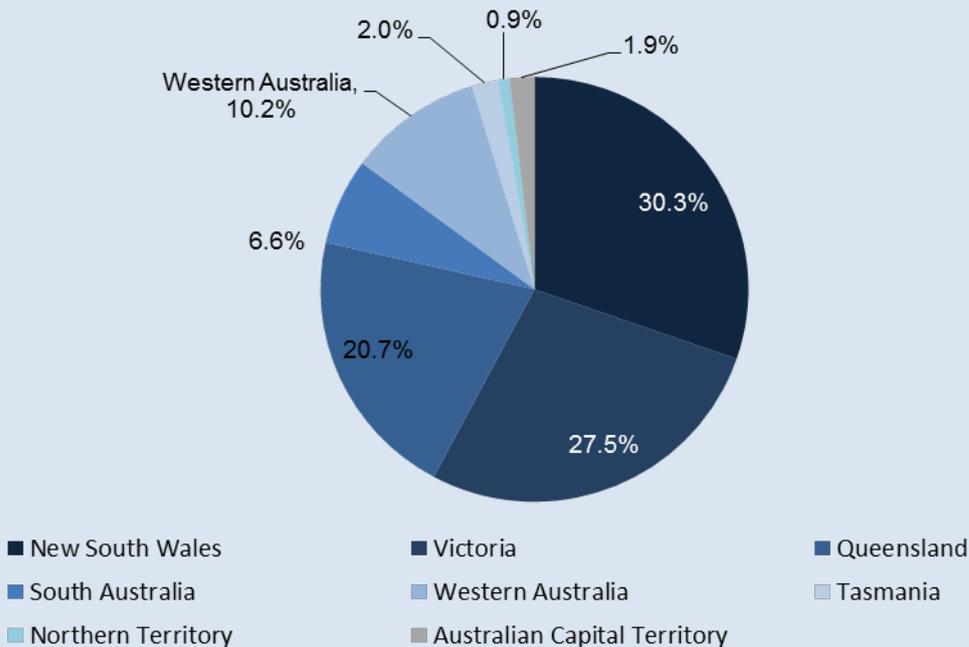
- (a) SIS10 Sport, Fitness and Recreation
- (b) RGR08 Racing
- (c) ACM10 Animal Care and Management

### Fast Facts

Graph 1 : Sport and Recreation Industry Size

- 9,703 persons employed in Sport and Recreation in WA.
- This accounts for 0.9% of total employed persons in WA and one tenth of all people employed in Sport and Recreation nation-wide.
- The largest employing occupations were : Fitness instructor, 1979 employed persons; Swimming coach or instructor, 1075 employed persons; and Greenkeeper, 1035 employed persons

#### National distribution of people employed in Sport and Recreation



Source: Australian Bureau of Statistics 4148.0 Employment in Sport, Australia, 2011

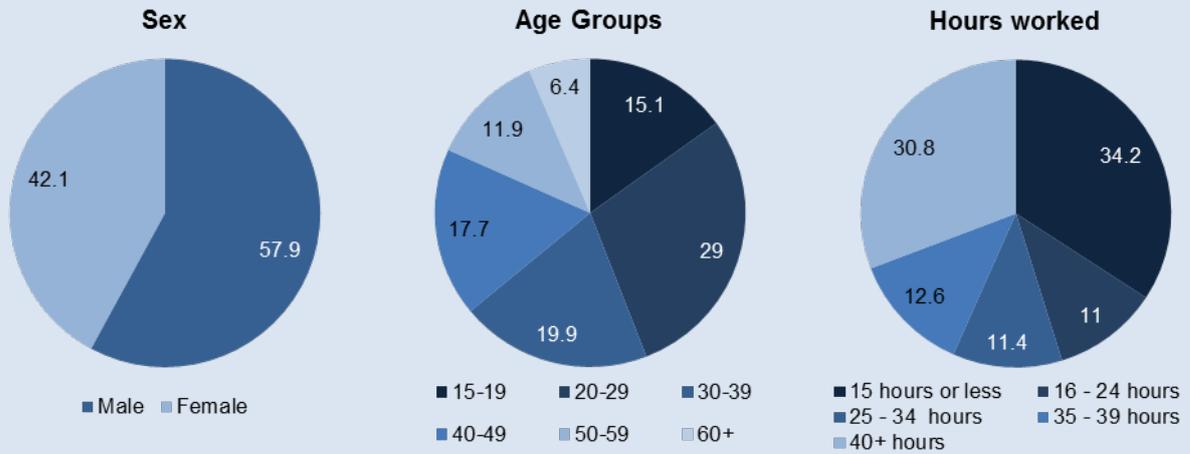
Western Australian numbers of persons employed in sport or physical recreation occupations are listed in the table below:

Table 1: Western Australian Persons Employed in a Sport or Physical Recreation Occupation – 2006, 2011 Census

Occupation	Western Australia 2006 Total	Western Australia 2011 Total	% Increase/Decrease	Australia 2011 Total
121316 Horse Breeder	112	136	+21%	1,396
139915 Sports Administrator	199	227	+14%	2,265
149112 Fitness Centre Manager	179	249	+39%	2,520
149113 Sports Centre Manager	499	484	-3%	3,581
272612 Recreation Officer	207	228	+10%	1,839
323312 Gunsmith	15	14	-7%	202
361111 Dog Handler or Trainer	53	73	+38%	838
361112 Horse Trainer	283	366	+29%	3,107
362311 Greenkeeper	1,010	1,035	+2%	11,345
393111 Canvas Goods Fabricator	110	116	+6%	569
393113 Sail Maker	66	45	-32%	398
399111 Boat Builder and Repairer	0	398		2,692
452111 Fitness Instructor	1,395	1,979	+42%	21,514
452211 Bungy Jump Master	0	0		3
452212 Fishing Guide	4	6	+50%	108
452213 Hunting Guide	0	0		6
452214 Mountain or Glacier Guide	0	0		18
452215 Outdoor Adventure Instructor	65	112	+72%	1,383
452216 Trekking Guide	4	0	-100%	23
452217 Whitewater Rafting Guide	0	0		27
452299 Outdoor Adventure Guides nec(a)	16	31	+94%	344
452311 Diving Instructor (Open Water)	55	71	+29%	567
452312 Gymnastics Coach or Instructor	192	241	+25%	2,507
452313 Horse Riding Coach or Instructor	76	98	+29%	695
452314 Snowsport Instructor	7	5	-29%	551
452315 Swimming Coach or Instructor	770	1,075	+40%	10,278
452316 Tennis Coach	132	184	+39%	2,428
452317 Other Sports Coach or Instructor	393	501	+27%	4,984
452318 Dog or Horse Racing Official	63	64	+2%	533
452321 Sports Development Officer	133	138	+4%	1,072
452322 Sports Umpire	318	397	+25%	3,294
452323 Other Sports Official	14	18	+29%	148
452499 Sportspersons nec(b)	56	93	+66%	1,031
452411 Footballer	118	129	+9%	1,609
452412 Golfer	105	93	-11%	1,089
452413 Jockey	68	64	-6%	583
452414 Lifeguard	327	419	+28%	3,541
841516 Stablehand	303	420	+39%	4,320
450000 Other Sports and Fitness Workers nfd(c)	102	194	+90%	2,182
<b>Total</b>	<b>7,446</b>	<b>9,703</b>	<b>+30%</b>	<b>95,590</b>

Graph 2: Sport and Recreation Industry Demographics

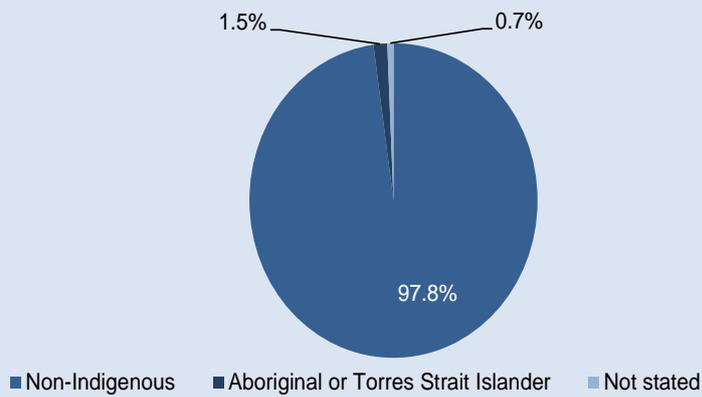
- The industry is characterised as being predominantly a younger (44% under 30 years) male-orientated (58%), part-time work force (55% working less than 35 hours per week).



Source: Australian Bureau of Statistics 4148.0 Employment in Sport, Australia, 2011

Graph 3: Sport and Recreation Indigenous Employment Status

- The majority of workers in the Sport and Recreation Industries in Australia are Non-Indigenous.
  - Of the Aboriginal or Torres Strait Islander people working in Sport and Recreation, the most common occupations held are Greenkeeper (22%), Fitness Instructor (11%), Recreation Officer (9%) and Footballer (8%)



Source: Australian Bureau of Statistics 4148.0 Employment in Sport, Australia, 2011

## Workforce Development Drivers

### a Skilled labour

- Aging Population: The ramifications of an ageing population are that there is expected to be greater demand for tailored sport, recreation and fitness services and qualified professionals over the coming years to meet the older-adult age group's specific needs.
- SME's: The sport, recreation and racing industries are characterised by a large number of private and small to medium sized businesses (clubs and associations). An ongoing requirement of these SME's is to have access to professional development opportunities to ensure best practice models are followed to increase their 'professionalism'
- Rising obesity levels: The increasing levels of obesity amongst the Australian population have assisted in driving up interest in the fitness industry's services
- Volunteers: The large number of volunteers sport, recreation and racing clubs and organisations rely on presents a number of workforce challenges around attraction and retention. Despite playing such a large and vital role in the industry, many volunteers have not undertaken training for their role or are not given enough support. A challenge for the sector is to provide training to volunteers without being onerous on the person's time, or financially unaffordable
- Shortage of labour: Labour shortages across the sport, recreation and racing industries are more apparent in regional and remote areas, with the greatest shortages being felt in the outdoor recreation, aquatics and racing industries.

### b Governmental Policy

- The Western Australian Training Accreditation Council (TAC) audit of VETiS delivery has identified critical issues around the delivery of sport and recreation, and outdoor recreation qualifications in schools. There is a need to invest in the professional development of teachers delivering the training, and to look at improving school and industry connections.
- State Government Infrastructure Planning: The development of the new Perth Stadium is due for completion at the end of 2017. The stadium will not only provide a world-class venue for sporting fans in WA, but it will also bring about associated employment benefits with it accommodating an expected peak workforce of 950 during the construction phase, and employment in the hospitality and catering sectors through the provision of 70 food and beverage outlets upon completion

### c Environment

- Seasonality: Managing seasonality is a defining characteristic in the outdoor recreation industry. Due to the seasonality of the WA weather, and the peaks and lulls of the tourist season, many businesses will focus their activities within the Perth greater metropolitan region during summer months, and the northwest of the state during the winter months.
- Climate change: Australian sport needs to adapt to climate change. Heat, floods, drought and rising seas will increasingly affect sport, recreation and racing facilities and events across the country
- Sustainability practices: Aquatic centres throughout Western Australia are continually looking at means by which to introduce more energy efficient measures to reduce their energy expenditure and reduce carbon emissions. Sport and racing clubs and organisations are also looking at implementing strategies for maximum water-use efficiencies on sports grounds and public open spaces

## **d Technology and Innovation**

- Social media: The rise of social media has presented a cheap and efficient marketing platform for sport, recreation and racing organisations to utilise. Social media provides greater ease at which to disseminate information to a large number of recipients instantly, however requires that associated policies and guidelines are in place to ensure its correct use and to limit potentially inflammatory behaviour.
- Apps: With the rapid adoption of smartphones there has been a substantial rise in the number of health and fitness apps that offer detailed fitness programs.
- Online betting: Major technology advances are also apparent through racing wagering. Racing clubs are now placing their races on pay-TV which has allowed for a national TV based betting system to be introduced and has led to substantial increases in phone betting and turnover. The sporting betting market has grown substantially in recent years, driven, in part, by growth in the use of the Internet and mobile phones as mediums for placing bets.

## Key Issues

Low Farriery  
Apprenticeship  
numbers

Need for greater  
industry participation  
in workforce  
development practices

Lack of outdoor  
recreation VET  
delivery at  
Certificate III and IV  
levels

Significant increases  
in VET in Schools  
delivery in sport and  
recreation  
qualifications

Table 2: Summary of Issues Table

Issue	Recommended Priority Action(s)	Skilling WA Strategy	Lead Agency	Due Date:
<b>FutureNow to work with stakeholders to source an appropriate RTO for the delivery of the farriery apprenticeship to ensure the continued supply of qualified farriers to the industry</b>	After the awarding of the contract of delivery of the Farriery Apprenticeship to a South-Australian based RTO – Educational Services and Consultants, FutureNow will liaise with this RTO, together with Racing and Wagering WA and industry farriers to monitor the delivery of the apprenticeships in WA to ensure the continued supply of qualified farriers	Strategic Goal 4: Provide flexible, responsive and innovative education and training which enables people to develop and utilise the skills necessary for them to realise their potential and contribute to Western Australia's prosperity	FutureNow, Racing and Wagering WA	Dec 2015
<b>There is a lack of knowledge of workforce development practices in the sport, recreation and racing industries</b>	FutureNow to partner with relevant Government Departments, peak sport, recreation and racing bodies, and advisory groups to promote the importance of workforce planning for the sport, recreation and racing industries	Strategic Goal 5: Plan and coordinate a strategic State Government response to workforce development issues in Western Australia	FutureNow, Department of Sport and Recreation, WA Sports Federation, Racing and Wagering WA	Dec 2015
<b>There is a shortage of outdoor recreation instructors in WA, resulting from a lack of training providers delivering Certificate III and IV level outdoor recreation qualifications</b>	FutureNow to partner with Outdoors WA and training providers to increase and develop a coordinated approach to outdoor recreation training delivery and career pathway opportunities	Strategic Goal 4: Provide flexible, responsive and innovative education and training which enables people to develop and utilise the skills necessary for them to realise their potential and contribute to Western Australia's prosperity	FutureNow, Outdoors WA	Dec 2015
<b>Large increases in VET in school delivery for sport and recreation qualifications is currently being experienced, with numbers likely to increase substantially with the introduction of new WACE requirements in 2015</b>	FutureNow to monitor VETIS delivery in sport and recreation qualifications in relation to current and planned enrolments and completions	Strategic Goal 4: Provide flexible, responsive and innovative education and training which enables people to develop and utilise the skills necessary for them to realise their potential and contribute to Western Australia's prosperity	FutureNow	Dec 2015

## **SECTION 2 METHODOLOGY**

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### **Methodology**

FutureNow Creative and Leisure Industries Training Council, the State Training Council representing the sport, recreation and racing industries, has developed a framework in partnership with the Western Australian Department of Training and Workforce Development for a Workforce Development Plan for the sport, recreation and racing industries.

The Workforce development Plan had been developed through extensive consultation and partnerships with National Skills Councils, Service Skills Australia and AgriFood; key industry associations, employee associations, Government agencies, registered training organisation and other key industry leaders in Western Australia. Consultation includes face to face meetings, workshops, forums, advisory groups and projects. The industry intelligence gathered forms the basis of this document. Industry Associations/Organisations consulted are listed in Section 7, Appendix 1.

## SECTION 3 INDUSTRY PROFILE – Community Recreation and Aquatics

### 3.1 Overview of the Community Recreation and Aquatics Industry

#### 3.1.1 Industry Analysis

There are a total of 127 aquatic centres in Western Australia – 35 of which are in Perth and 92 in regional areas of Western Australia. Combined, these 127 centres operate around 321 swimming pools and are staffed by more than 3,000 workers<sup>1</sup>.

Public swimming pools continue to be important community facilities that are utilised frequently for leisure, sport and recreation. In 2012-13, the estimated patronage at public pools in WA increased to over 10 million visits a year; this is 6% higher than the 2010-11 estimate and equates to approximately 4 to 5 visits per year per person in WA. Of these approximately 10 million visits, 7 million were to metropolitan pools<sup>2</sup>.

There were over 2750 people employed in community recreation related occupations in WA from the last Census figures (see below)<sup>3</sup>. These occupations included recreation officer, greenkeeper, swimming coach or instructor, and lifeguard. All occupations increased in number from the 2006 Census, with swimming coach or instructor experience the largest growth at 40%, or an additional 305 people.

Table 3: Community Recreation and Aquatic Occupations, ABS 2006-2011 Comparison

Occupation	Western Australia 2006 Total	Western Australia 2011 Total	% Increase/ Decrease	Australia 2011 Total
272612 Recreation Officer	207	228	+10%	1,839
362311 Greenkeeper	1,010	1,035	+2%	11,345
452315 Swimming Coach or Instructor	770	1,075	+40%	10,278
452414 Lifeguard	327	419	+28%	3,541

Source: Australian Bureau of Statistics, Employment in Sport, Australia, 2011; Employment in Sport, Australia, 2006

#### 3.1.2 Industry Trends

The growth in the awareness of the need for water safety has seen a large spike in the number of swimming coaches and instructors, and lifeguards employed in Western Australia. From 2006 – 2011, there was an increase of 40% in the number of people employed as swimming coaches or instructors from 770 to 1,075 and an increase from 327 to 419 in the number of people employed as lifeguards. In addition to this, AUSTSWIM WA branch has over 5,500 licensed swimming teachers and the Department of Education alone employs 1,500 qualified swimming instructors for its VacSwim program.

#### 3.1.3 Labour and Skill Demand

There are over 3000 full time, part time and casual positions in the WA aquatics industry, the majority of which are casual positions (83%)<sup>4</sup>. These staff are employed in 124 public aquatic centres in Western Australia that provide significant benefit in terms of health, fitness, sport and community development<sup>5</sup>.

<sup>1</sup> ATCO Gas Australia, LIWA Industry report. Reducing Energy Expenditure in Western Australian Aquatic Centres. 2015

<sup>2</sup> Bigger, Better, Safer: A report on the Western Australian Aquatics Industry 2012-13.

<sup>3</sup> Australian Bureau of Statistics 4148.0 Employment in Sport, Australia, 2011. Released 22 October 2013.

<sup>4</sup> Bigger, Better, Safer 2013-14 Western Australian Aquatics Industry Report

<sup>5</sup> Leaversuch, P., Preston, H., *Aquatic Recreation Centres in Western Australia – Industry Profile 2011*, Leisure Institute of Western Australia (Aquatics)

### Pool operators

An estimated 423 pool operators are required by the WA aquatics industry and at June 2014, there were 435 people accredited for this role through LIWA Aquatics. Only 62% of pool operators who were accredited in 2012-13 had maintained their qualification at June 2014 and overall the number has decreased by 107 people since last year. However there were an additional 96 new qualifications meaning that 22% of the current workforce is newly qualified<sup>6</sup>.

### Pool lifeguards

According to the Bigger Better Safer Aquatics Industry Report<sup>7</sup>, the aquatics industry requires an estimated 958 pool lifeguards and at June 2014 there were 1,468 people qualified through the Royal Life Saving Society. All regions, with the exception of the Esperance and Goldfields region appear to have sufficient numbers of qualified people to meet demand. Whilst the number of qualified lifeguards has increased slightly from last year (1,648 vs 1,427), only 64% of those registered at June 2013 maintained their qualification this year, meaning that more than 500 people have let their qualifications lapse in this time. The overall increase in numbers has been achieved by 560 people completing new qualifications and these people now make up 38% of the current lifeguard workforce.

### Swim instructors

There are an estimated 1,042 swim instructor positions in WA and almost all are casual (95%). At July 2014, there were 4,205 qualified swim instructors, over four times the number required and based on these numbers, no regions appeared to have any shortfalls in supply of swim instructors<sup>8</sup>. Over 70% of these are from the Perth and Mandurah regions. All of the regions have between 1.5 to 2 times the number of swim instructors required.

Western Australia's VacSwim program is the largest program of its kind in Australia, and provides swimming lessons for more than 50,000 Western Australian children, and is rolled-out by more than 1,500 qualified swimming instructors<sup>9</sup>. The Department of Education is the largest employer of swimming instructors, employing more than 1,500 qualified swimming instructors in the VacSwim and Intern Swimming Programs. The Department's preferred qualification is the AUSTSWIM Teacher of Swimming and Water Safety Certificate or equivalent.

Public aquatic facilities play a pivotal role in teaching WA children swimming and water safety. All metropolitan pools reported having their own swim school. The majority of aquatic centres reported that Education Department swimming lessons (in-term and/or VacSwim) were conducted at their pool<sup>10</sup>.

The 2013 Sportspeople Workplace Survey revealed that 30.8% of those employed in the aquatics sector hold a Bachelor's Degree, and two thirds (67.8%) have completed an industry specific accreditation such as AUSTSWIM, and 43.6% hold a Certificate IV qualification.

### **3.1.4 Regional Impact**

Although metropolitan Perth appears to have sufficient numbers of aquatics staff, it is reported that shortages are particularly acute in regional and remote locations.

While there appears to be sufficient numbers of qualified Pool Operators and Lifeguards in WA, some regional areas experience shortfalls. The Mid West and Gascoyne and the Pilbara regions have shortfalls in pool operators and the Esperance and Goldfields region has shortfalls in both operators and lifeguards<sup>11</sup>.

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<sup>6</sup> Bigger, Better, Safer 2013-14 Western Australian Aquatics Industry Report

<sup>7</sup> Bigger, Better, Safer 2013-14 Western Australian Aquatics Industry Report

<sup>8</sup> Bigger, Better, Safer 2013-14 Western Australian Aquatics Industry Report

<sup>9</sup> Australasian Leisure Management: VacSwim School Holiday Swimming Program Begins in Western Australia. January 2, 2014.

<sup>10</sup> Bigger, Better, Safer: A report on the Western Australian Aquatics Industry 2012-13.

<sup>11</sup> Bigger Better Safer 2013-14 Western Australian Aquatics Industry Report

According to findings in the Bigger Better Safer Western Australian Aquatics Industry Report, there also appears to be sufficient numbers of qualified swim instructors in metropolitan WA, however regional areas continue to report difficulties in attracting qualified personnel<sup>12</sup>.

Shortages in regional areas are being experienced by the Department of Education's VacSwim program, with staff shortages at various country areas resulting in programs being cancelled at those venues. The specific locations were: Munglinup, Hamelin Bay, Coolgardie, Denham, Duke of Orleans Bay, Kambalda West, Leinster, Leonora, Margaret River, Mount Magnet, Norseman and Pannawonica<sup>13</sup>.

The industry needs key staff like lifeguards and customer service personnel in order to keep facilities open and have sufficient staffing levels to comply with OHS requirements and Royal Life Saving Society of Australia (RLSSA) Guidelines for Safe Pool Operations<sup>14</sup>.

The Western Australian Government through the Royalties for Regions program has recognised the role country swimming pools play in strengthening communities with the allocation of an additional \$13.2 million over four years for the maintenance and upgrades of regional pools as part of a Community Pool Revitalisation Program. The funding will be used for centre maintenance, upgrades, purchase of pool equipment and staff training<sup>15</sup>.

Community recreation staff in general is in short supply in regional and remote areas. This is due to issues with attraction, as wages in the industry are lower than large rural employers (like mining) and the seasonal nature of some of the work offers no job security or year-round employment<sup>16</sup>.

### **3.1.5 Regulatory Requirements (if applicable)**

Legalisation requires all aquatic industry personnel to be accredited with LIWA Aquatics and have access to relevant professional development. The accreditation process will ensure that only qualified well trained industry personnel are responsible for the operation, supervision and delivery of emergency care in a Group One Aquatic Facility. Those working in the Aquatic Recreation Industry in WA must be an accredited member of LIWA Aquatics to ensure compliance to the WA Health Department Code of Practice.

The AUSTSWIM accreditation is the industry standard for Swimming and Water Safety Teachers, and is delivered and recognised in each state and territory of Australia and many countries overseas.

### **3.1.6 Gender/ Age Participation**

The 2013 Sportspeople Workplace Survey which provides demographic information on respondents working in the sport, fitness, aquatic, coaching, venues, events, leisure or lifestyle sector found that of 2,122 respondents, the aquatics sector had the highest percentage of female employees (71.7%), followed by the fitness sector (66.2%). Over one third (38%) of respondents in the aquatic sector are aged 50 or older, compared with 18% each for the fitness and sport sectors<sup>17</sup>.

### **3.1.7 Under-represented Groups Participation**

YMCA Perth's Swim for Life program is an indigenous youth employment program to assist young people in the Pilbara – an underrepresented group in aquatic employment. Since the program's beginnings in 2008, 80 young people have qualified for their Bronze lifeguarding medallion, and a further 30 have found employment in the sport and recreation industry,

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<sup>12</sup> Bigger Better Safer 2013-14 Western Australian Aquatics Industry Report

<sup>13</sup> Feedback received from the Swimming and Water Safety Branch, Department of Education, March 2015

<sup>14</sup> Service Skills Australia Sport, Fitness, Outdoor and Community Recreation Environmental Scan 2012

<sup>15</sup> Australasian Leisure Management: Western Australian Government Commits \$13.2 million to Regional Pools. July 16, 2014.

<sup>16</sup> Service Skills Australia Environmental Scan 2015 Sport, Fitness and Recreation

<sup>17</sup> 2013 Sportspeople Workplace Survey

including as qualified lifeguards. In addition, the program has assisted 60 young people gain Senior First Aid qualifications, and given 10 indigenous youth the opportunity to become certificate AUSTSWIM instructors. Funded by Royalties for Regions and BHP Billiton, Swim for Life is conducted in Port Hedland, Newman and Broome<sup>18</sup>.

According to ABS data, 138 Aboriginal or Torres Strait Islander people were employed as Recreation Officers in 2011. There were also 89 employed as Swimming Coaches or Instructors, and 58 as Lifeguards<sup>19</sup>.

According to the Bigger, Better, Safer report on the Western Australian Aquatics Industry 2012-13, specific programs for people with a disability were limited in regional areas and a lower proportion of aquatic centres offered specific learn to swim classes for groups including the elderly and people of Culturally and Linguistically Diverse (CaLD) backgrounds, choosing to cater for these groups via main-stream lessons<sup>20</sup>. Given the increasing diversity of the population, with more migrants making WA home, it is essential that these groups have access to swimming and water safety education programs, run by suitably qualified aquatic professionals to meet their specific needs.

### **3.2 Major Challenges and Barriers**

The size of the state provides a barrier to ensuring training access to people in regional and remote areas of Western Australia. Without qualified staff for aquatic roles, there have been instances in the past where regional pools have had to close due to a lack of staffing. The costs associated with delivering training to the regions is also a challenge for training providers, with the YMCA, Royal Life Saving Society, AUSTSWIM and other Perth-based organisations running block training courses across the state for roles such as pool operator, pool lifeguard and swimming teacher.

There are barriers to accessing training for those located in rural and remote areas of Western Australia. Training providers often see regional training as unfeasible due to the smaller number of participants requiring access to training. This is most apparent in the aquatics industry for occupations such as pool lifeguard, pool operator, and swim teacher where training, and training for accreditation or refreshing of qualifications is continually needed.

High staff turnover rates are a major challenge of the aquatics industry. Nearly 40% of both pool operators and lifeguards who were registered at June 2013 had not maintained their registration at June 2014<sup>21</sup>.

The Department of Education School Swimming and Water Safety Branch, who coordinate the VacSwim program for state schools (during the October and December/January school holidays), reveal that the Branch experienced staff shortages at various country areas during VacSwim programs, and on occasions this resulted in programs being cancelled at those venues.

### **3.3 New and Emerging Skills**

AUSTSWIM have created new training courses for Aquatic Services Officers, as well as Aqua Fit to cover skills gaps for roles that existed in the aquatics sector.

Aquatic industry skill sets available in the SIS10 Sport, Fitness and Recreation Training Package provide sufficient training for the needs of the industry.

Service Skills Australia's 2015 Sport, Fitness and Recreation Scan reports that there are emerging needs for<sup>22</sup>:

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<sup>18</sup> Australasian Leisure Management: Swim for Life Celebrates Five Years in the Pilbara. January 10, 2013.

<sup>19</sup> Australian Bureau of Statistics 4148.0 Employment in Sport, Australia, 2011. Released 22 October 2013.

<sup>20</sup> Bigger, Better, Safer: A report on the Western Australian Aquatics Industry 2012-13.

<sup>21</sup> Bigger Better Safer 2013-14 Western Australian Aquatics Industry Report

<sup>22</sup> Service Skills Australia Environmental Scan 2015 Sport, Fitness and Recreation

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

### 3.4 Occupations in Demand

The State Priority Occupation List (SPOL) is a list of occupations produced annually by the Department of Training and Workforce Development (DTWD) which are rated according to their identified priority status in Western Australia. More information about the rankings of occupations can be found in the SPOL Summary Paper at:

<http://www.dtwd.wa.gov.au/workforceplanninganddevelopment/occupationlists/spol/Pages/spol.aspx>

FutureNow in consultation with relevant aquatics organisations has identified the following as being occupations in demand<sup>23</sup>:

Table 4: State Priority Occupations List 2015 – Aquatics

State Priority Occupations List (SPOL)		
ANZSCO	Occupation	2015 SPOL Ranking
452315	Swimming coach or instructor	Other identified occupation*

*\* Other identified occupations refers to occupations where issues have been identified through consultations undertaken across various industries or regions; however at this current time there is not enough evidence to support the existence of widespread unmet demand or other, non-market factors which would see their elevation to a priority status. These occupations are being closely monitored by DTWD for any evidence which may see them elevated to a priority status in the future.*

FutureNow will continue to monitor, and lobby where necessary for the inclusion of aquatics occupations on future SPOL lists to ensure the continued supply of qualified aquatics professionals to meet the needs of the industry.

### 3.5 Workforce Development Opportunities

Training in the regional areas of WA remains a priority for the aquatics industry. Continued efforts need to be made to promote the update of training locally, such as working with schools to identify potential candidates for traineeships and organising local training courses. Local training for the occupations of pool operators and lifeguards is a focus for the regions of Pilbara; Mid-West and Gascoyne; and the Esperance and Goldfields region<sup>24</sup>.

Initiatives to engage swimming instructors to take up employment and remain in the industry need to be developed. Of particular importance is the need for strategies to overcome barriers to recruitment in regional areas<sup>25</sup>.

High industry turnover (40% of pool operators and lifeguards who were registered at June 2013 had not maintained their registration at June 2014) creates an opportunity for implementing engagement strategies to ensure qualifications are renewed and registrations maintained.

<sup>23</sup> Department of Training and Workforce Development. State Priority Occupation List. Accessed from: <http://www.dtwd.wa.gov.au/workforceplanninganddevelopment/occupationlists/spol/Pages/spol.aspx> 17 August 2015.

<sup>24</sup> Bigger Better Safer 2013-14 Western Australian Aquatics Industry Report

<sup>25</sup> Bigger Better Safer 2013-14 Western Australian Aquatics Industry Report

Feedback from the peak aquatic industry bodies reveals that the industry-specific technical skill sets (such as pool lifeguard, swimming instructor etc.) are sufficient to meet job requirements, with no real demand for the full Certificate III in Aquatics qualification.

### 3.6 VET Training Data by Qualification – Enrolments and Completion

Table 5: VESU Institutional-based Course Enrolments for Community Recreation and Aquatics Qualifications

Course Enrolments	2012	2013	2014
SIS20110 Certificate II in Community Activities	0	83	25
SIS20113 Certificate II in Community Activities	0	0	19
SIS30110 Certificate III in Aquatics	0	0	0
SIS30113 Certificate III in Aquatics	0	0	0
SIS30210 Certificate III in Community Activity Programs	0	4	0
<b>TOTAL</b>	<b>0</b>	<b>87</b>	<b>44</b>

Table 6: TRS Traineeship Commencements for Community Recreation and Aquatics Qualifications

Traineeship Commencements	2012	2013	2014	2015 (as of)
Certificate II in Community Activities (SIS20110)	4	2	0	0
Certificate II in Community Activities (SIS20113)	0	0	1	0
Certificate III in Aquatics (SIS30110)	3	10	0	0
Certificate III in Aquatics (SIS30113)	0	0	2	0
<b>TOTAL</b>	<b>7</b>	<b>12</b>	<b>3</b>	<b>0</b>

Table 7: TRS Traineeship Completions for Community Recreation and Aquatics Qualifications

Completions	2012	2013	2014	2015 (as of)
Certificate II in Community Activities (SIS20110)	2	3	0	0
Certificate III in Aquatics (SIS30110)	3	1	0	0
Certificate III in Aquatics (SIS30113)	0	0	5	1
<b>TOTAL</b>	<b>5</b>	<b>4</b>	<b>5</b>	<b>1</b>

Table 8: School Curriculum and Standards Authority VETiS Statistics for Community Recreation and Aquatics Qualifications (2013 and 2014)

Code	Qualification	2013		2014	
		Full qualification completion	Partial qualification completion	Full qualification completion	Partial qualification completion
SIS20110	Certificate II in Community Activities	41	17	11	13
SIS20113	Certificate II in Community Activities	0	0	0	95
SIS30210	Certificate III in Community Activity Programs	0	4	0	3
SIS30110	Certificate III in Aquatics	0	2	0	2
<b>TOTAL</b>		<b>41</b>	<b>23</b>	<b>11</b>	<b>113</b>

### **3.7 Higher Education Pathways**

N/A

### **3.8 Industry Issues Bullet Points:**

- Many of the aquatics roles such as swimming teacher, pool lifeguard and pool operator are not seen as long-term career options
- There are high rates of turnover (not maintaining industry registration) and a highly casualised workforce
- There are challenges with attracting staff to regional and remote employment locations
- The ageing demographic of some pool operators will leave a knowledge and labour gap in aquatic centres in coming years

## SECTION 3 INDUSTRY PROFILE – Fitness

### 3.1 Overview of the Fitness Industry

#### 3.1.1 Industry Analysis

The fitness workforce is primarily considered to consist of fitness professionals, defined as those who ‘direct, instruct and guide individuals and groups in the pursuit of physical fitness and wellbeing’ (ABS, 2006), working across a range of recognised industry occupations within a diverse array of business models, from gyms and fitness centres or outdoor group fitness providers to specialist training studios and facilities or mobile personal training services.

There were substantial increases in the number of people employed as fitness instructors in WA between the 2006 and 2011 census with a 42% increase to almost 2000 persons. As a result, there was also a 39% increase in fitness centre managers to 249 persons employed in 2011 due to the large increases in new fitness centre openings<sup>26</sup>.

Table 9: Fitness Occupations, ABS 2006-2011 Comparison

Occupation	Western Australia 2006 Total	Western Australia 2011 Total	% Increase/ Decrease	Australia 2011 Total
149112 Fitness Centre Manager	179	249	+39%	2,520
452111 Fitness Instructor	1,395	1,979	+42%	21,514
450000 Other Sports and Fitness Workers nfd(c)	102	194	+90%	2,182

Source: Australian Bureau of Statistics, Employment in Sport, Australia, 2011; Employment in Sport, Australia, 2006

While some industries in Australia were considerably affected by the recent global economic downturn, the fitness industry has been steadily growing over the past few years. The Australian Government is making a significant effort to encourage Australians to adopt a healthier lifestyle, resulting in a greater demand for fitness products and services<sup>27</sup>.

The fitness industry in Australia generates an average of about one billion dollars in revenue on an annual basis. There are 2,856 gyms and fitness centres across the country, which collectively provide employment for more than 17,000 people. The industry is expected to grow by more than 4.8% between 2009 and 2014. The popularity of weight loss reality TV shows, efforts by the government to promote healthy living and weight loss, and the household outsourcing trend are some of the factors that have contributed to the increase in demand for fitness services and products<sup>28</sup>.

In Western Australia, it’s been described as a ‘burgeoning fitness revolution’ *The West Australian – Appetite to Get Fit Grows*, a phenomenon in which the number of registered fitness businesses almost quadrupled in four years and the number of exercise professionals more than doubled to 2749 – which is more than the number of GP’s in Western Australia<sup>29</sup>.

The latest data from the 2011 ABS Census revealed that there were 1979 fitness instructors and 249 fitness centre managers employed in Western Australia in 2011. This is a rise of 42% (fitness instructors) and 39% (fitness centre managers) on the number of people employed in those occupations compared to the 2006 census. Fitness instructors make up the largest occupation employed within the sport and physical recreation industry in Western Australia.

<sup>26</sup> Australian Bureau of Statistics, Employment in Sport, Australia, 2011

<sup>27</sup> Australia Business Review. Australia’s Fitness Sector Sees Growth in the Billions. 22 November 2013.

<sup>28</sup> Australia Business Review. Australia’s Fitness Sector Sees Growth in the Billions. 22 November 2013.

<sup>29</sup> The West Australian. Appetite to get fit grows. May 5, 2013.

The fitness industry is characterised by a large number of private and small to medium sized businesses. There has also been an expansion of niche areas in the industry such as women's circuit training<sup>30</sup>. The prevalence of 24/7 gyms is also on the rise, to meet the ever-changing needs of the population's working hours and preferences<sup>31</sup>.

As of January 2014, Jetts has the most number of fitness centres (39) in Western Australia (see table following). However Anytime Fitness is not far behind with plans to lift its number of outlets to 34 by the end of 2014. *Business News: Convenience clubs offer fitness options 1 September 2014*. Goodlife has recently acquired all of the remaining eight Fitness First centres for \$32.5 million, making it the biggest non-franchised gym operator in Australia and boosts the number of its gyms to 15 in WA and 77 nationally<sup>32</sup>.

Table 10: Number of Centres by WA Health Clubs (as of Jan 2014)

WA Health Clubs	Number of Centres
Jetts	39
Anytime Fitness	26
Snap Fitness 24/7	16
Plus Fitness 24/7	15
Fitness First	8
Goodlife	6
24/7 Power Fitness	4

Source: WA Business News

Comparisons show that the fitness industry, relative to the broader industry group of sport and recreation, has been growing at a faster rate in employment, wages, revenue and value added. These are all linked to the increase in participation in gyms and fitness classes relative to sport and recreation more broadly. Aerobics, fitness or gym activities are now the second most popular physical recreational activity, with only walking being more popular. The fitness industry has more participants than swimming and cycling (the next biggest) combined<sup>33</sup>.

The latest data available (ABS, 2010a) show that attendance at clubs is on the rise, with 18.3% of the Australian population participating in organised fitness activities in 2009-10, a 2.1% rise since 2005-6. The industry is characterised by a large number of private, small to medium sized businesses, due to the relatively low barriers to entry from small businesses. The recent expansion of small and bigger players into former niche areas – such as women's circuit training, corporate training, and wellness programs – has helped fuel the growth within the fitness industry<sup>34</sup>.

The fitness industry has substantially evolved from the early gym-centred environments for well, fit people to 'pump iron' and work out with a focus on looking good. Today the focus has shifted to a more holistic concept that is more about feeling good and improving health and quality of life and the industry has embraced service offerings targeted towards new sub-populations and an expanded client base.

<sup>30</sup> Deloitte Access Economics. The Australian Fitness Industry Report 2012.

<sup>31</sup> WA Business News. Jetts' Trajectory Taking Off. 13 September 2013

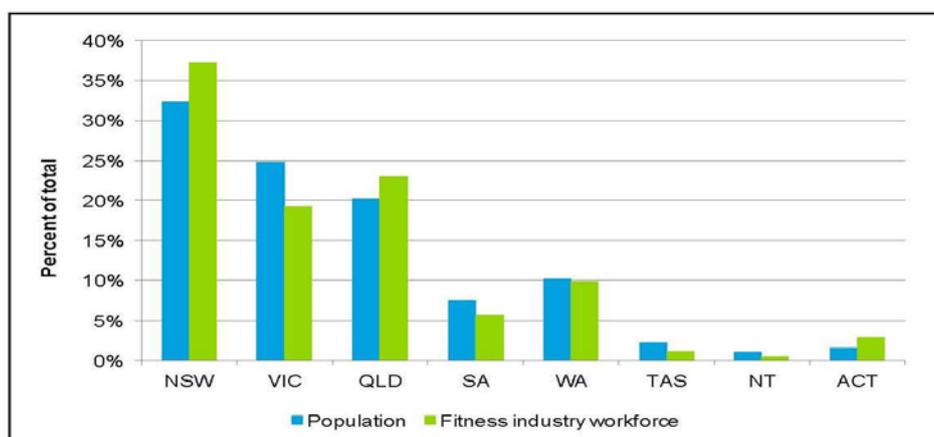
<sup>32</sup> The West Australian. Fitness First WA Sold for \$32.5m. August 6, 2014.

<sup>33</sup> Deloitte Access Economics. The Australian Fitness Industry Report 2012.

<sup>34</sup> Deloitte Access Economics. The Australian Fitness Industry Report 2012

The dispersion of fitness industry professionals throughout Australia broadly follows the population. In WA, there are around 1.5 fitness professionals per 1,000 population. Fitness Industry Workforce Report: 2010 – 2020<sup>35</sup>. See table following:

Graph 4: Dispersion of population and fitness industry workforce by jurisdiction, % of total, 2011



Source: Fitness Australia (2011).

The Australian Fitness Industry Report 2012<sup>36</sup> revealed that there are 30,000 exercise professionals registered in Australia with Fitness Australia and Physical Activity Australia. Over half of these are women. Almost two-thirds are aged between 22 – 39 years, with only 4% over the age of 55 years.

### 3.1.2 Industry Trends

#### Ageing population

ABS population predictions show that the Australian population is ageing. Between 2010 and 2020, the proportion of people aged 65 years or older is expected to increase from 13.6% to 16.8% of the total Australian population – a growth rate at almost four times that of the total population<sup>37</sup>. The ramifications of an ageing population are that there is expected to be greater demand for fitness services and professionals over the coming years to meet the older-adult age group's specific needs. As health funders and health professionals continue to advocate for and prescribe physical activity, demand for sport, recreation and fitness services is likely to continue to increase, particularly among older age groups, which have to date had lower participation rates than younger age groups. Moreover, the market is increasingly meeting this need by tailoring services towards wellness rather than towards body image. It is anticipated across the industry's evolution, younger people who have developed an early lifetime habit of utilising services may well carry that practice into older age, whereas current Australians aged over 65 had much lower exposure to the fitness industry as young adults<sup>38</sup>.

#### Adventure Racing and Bootcamp Fitness

Adventure racing has become increasingly popular in Perth with events such as Stampede, Spartan Race, Western Mudd Rush, Run Amuck Races and Tough Mudder all providing military-style events with the aim of completing the race.

<sup>35</sup> Deloitte Access Economics. The Australian Fitness Industry Report 2012.

<sup>36</sup> Deloitte Access Economics. The Australian Fitness Industry Report 2012.

<sup>37</sup> Australian Bureau of Statistics 3201.0 - Population by Age and Sex, Australian States and Territories, Jun 2010

<sup>38</sup> Service Skills Australia Sport, Fitness, Outdoor and Community Recreation Environmental Scan 2012

There has been a boom in the popularity of higher-intensity training programs, such as CrossFit, Grit and 'boot camp style' events, however with this popularity has come concern<sup>39</sup>. Without proper instruction by appropriately trained and skilled instructors, consumers may be put at risk of acute or chronic injury. This presents a potential need for improved training, education and accreditation of fitness professionals delivering these programs<sup>40</sup>.

### 24/7 Gym Growth

The market's strongest reported growth, is in the 24/7 business structure, where gyms focus on the provision of low cost, accessible gym facilities that maximise client convenience and flexibility<sup>41</sup>. National gym franchise Jetts has increased its presence in Western Australia during the past 12 months (to September 2013), growing its number of gyms from 32 to 40<sup>42</sup>. It has also risen up the ranks of franchise companies in Western Australia, from the 25<sup>th</sup> largest to the 17<sup>th</sup>, making it the largest franchise gym business in the state. In Western Australia, new Jetts clubs are opening up in Kalgoorlie, Yokine, Bunbury and Busselton, a move to more regional and smaller areas following saturation in more urban areas. Anytime Fitness is another low-cost 24/7 gym which has seen growth in Western Australia, with 26 gyms located in metropolitan and regional areas. However the growth of these low cost gyms has been to the detriment of full-service gyms such as previous market leader Fitness First which has lost market share to the low-cost gyms Jetts, Anytime Fitness and Snap Fitness 24/7<sup>43</sup>.

### Information technology

With the rapid adoption of smartphones there has been a substantial rise in the number of health and fitness apps that offer detailed fitness programs. New technology is also being adopted by facilities, with many developing their own app that provides fitness advice, class timetables, personalised encouragement messages and live streaming of classes. The rise of social media has also presented a cheap and efficient marketing platform for fitness professionals, which has encouraged a greater number of micro-businesses and freelancers<sup>44</sup>.

### Changing business models

The fitness industry, while facing challenges in terms of market penetration, continues to expand with a range of business models: from traditional 'big box' gyms, through to franchised 24/7 clubs. As a result of this, consumer choice is increasing, not only in terms of operators, but also with a range of models including martial arts and combat training facilities, specialist locations (such as CrossFit studios), personal training studios, outdoor group training, yoga and Pilates spaces and women-only clubs<sup>45</sup>. As it is predicted that the rate of new clients to the fitness industry is expected to slow, it is predicted that personal trainers will compete for existing clientele. This will encourage personal trainers to develop specialised training programs, targeted at niche markets. One such market that is increasing in popularity is pregnancy and postnatal training programs<sup>46</sup>.

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<sup>39</sup> Australasian Leisure Management: Concerns Over Quality of Crossfit Instructor Training. 20 March 2014.

<sup>40</sup> Service Skills Australia Fitness 2014 Environmental Scan Snapshot

<sup>41</sup> Deloitte Access Economics. The Australian Fitness Industry Report 2012.

<sup>42</sup> WA Business News. Jetts' Trajectory Taking Off. 13 September 2013.

<sup>43</sup> WA Business News. Gym Aims to be First in Fitness. 27 January 2014.

<sup>44</sup> Service Skills Australia Fitness 2014 Environmental Scan Snapshot

<sup>45</sup> Australasian Leisure Management. May/June 2014.

<sup>46</sup> IBISWorld Industry Report OD4195 Personal Trainers in Australia. November 2013.

### 3.1.3 Labour and Skill Demand

In 2011, registered exercise professionals through Fitness Australia and Physical Activity Australia numbered 29,875<sup>47</sup>. It is estimated that 75% of all fitness professionals are registered with these two organisations. With regard to fitness businesses, there were 1,200 registered with Fitness Australia – it is estimated that this comprises 53% of all Australian fitness businesses. Interviews with a variety of fitness industry stakeholders found that the fitness professionals are prone to high levels of turnover due to a variety of factors, including the lack of a structured career path and undesirable hours. Permanent industry exit is responsible for the main losses of fitness professionals from the sector.

In 2012, Fitness Australia commissioned Deloitte Access Economics<sup>48</sup> to assess the inflow of skilled fitness professionals into the fitness sector. The report found that approximately 12,500 students graduated from private RTO's in 2011. This compares with the NCVET data which found that 2,732 fitness graduates completed a qualification in 2011. Based on these numbers, the current VET reporting system only captured 17.9% of fitness graduates in 2011.

This research undertaken by Deloitte indicated that the Certificate III and IV in Fitness account for the largest proportion of qualifications within the fitness industry, with 17% of professionals qualified with Certificate III in Fitness only, 77% with Certificate IV in Fitness, 2% with a Diploma of Fitness, 3% with higher education (tertiary or post graduate) and 1% with international qualifications (Fitness Australia, 2011). The data shows that almost 90% of workforce participants in the fitness industry are registered gym instructors, around 80% registered as personal trainers, and 30% as group exercise instructors. Of the total number of registered professionals, Fitness Australia data shows that 46% are registered to work with older adults and 43% to work specifically with children. Less prevalent are yoga and aqua instructors, with only 0.3% and 1.5% of the workforce registered to supply these services.

Consultations by Deloitte Access Economics also identified that there are pockets of misdistribution - personal trainers, group fitness and gym instructors are relatively plentiful, perhaps even in oversupply, whereas other professionals such as aqua trainers, yoga and Zumba instructors are lacking.

As health funders and health professionals continue to advocate and prescribe physical activity, awareness of and demand for sport and recreation services including fitness are likely to continue to increase. These steps suggest increase demand for fitness services in older age groups particularly, which have traditionally had lower participation rates than younger age groups. Moreover, the market is increasingly meeting this need by tailoring services towards wellness rather than towards body image.<sup>49</sup>

The increasing levels of obesity have assisted in driving up interest in the fitness industry's services, particularly as those who are overweight generally do not exercise regularly and therefore stand to benefit more from specialised personal training services rather than gym memberships<sup>50</sup>.

Service Skills Australia's Fitness 2015 Environmental Scan Snapshot lists the following occupations as being in demand:

- Personal trainer
- Group exercise leader
- Aqua instructor/trainer

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<sup>47</sup> Deloitte Access Economics. The Australian Fitness Industry Report 2012.

<sup>48</sup> Deloitte Access Economics. The Australian Fitness Industry Report 2012.

<sup>49</sup> Deloitte Access Economics Fitness Industry Workforce Report: 2010 – 2020. January 2012

<sup>50</sup> IBISWorld Industry Report OD4195 Personal Trainers in Australia. November 2013.

### 3.1.4 Regional Impact

Business saturation in urban areas of the fitness market has seen a number of gym openings in regional areas such as Kalgoorlie, Bunbury and Busselton<sup>51</sup>.

Remote mining camps in regional Western Australia have also increased the need for qualified fitness professionals to staff mine site gyms, recreational facilities and roll out healthy lifestyle initiatives. Establishing a healthy lifestyle has long been acknowledged as a problem for FIFO workers – a government inquiry released in April 2013, *Health behaviours and outcomes associated with fly-in fly-out and shift workers in Western Australia*, said they were more likely than their nine to five counterparts to be overweight or obese, drink to excess and smoke. Initiatives such as the Compass Group's Tastelife weight-loss challenge which involves Active Life Coaches monitoring diets, organising exercise programs and tracking the progress of participants is one example. The challenge has been running for 13 years and the number of employed Active Life Coaches has increased from five to 130 as demand for site fitness programs has increased<sup>52</sup>.

*Across the country*, a recent article in the Australasian Leisure Management<sup>53</sup> included an interview with Nordic Fitness Sales Manager John Davy who has observed that one of the strongest performing areas of their business is coming from gyms setting up in remote locations by mining companies. Among the most successful remote area gyms are the five on Barrow Island, where Chevron's \$52 billion Gorgon project is underway. The Barrow Island facilities include a women-only gym, with all five gyms highly patronized, providing a fitness and recreational outlet on sites where alcohol is either banned or highly restricted. In the remote location project where two workers committed suicide within the space of four months late in 2014, the gyms also help maintain mental health.

At Fortescue Metals' Cloudbreak mine in the Pilbara, as well as a gym, workers have been provided with tennis courts, a running track and a golf course to encourage FIFO workers to keep fit, while at Wickham, Rio Tinto put \$3 million into a recreation centre.

Local councils have also played a role in keeping mineworkers fit. In Port Hedland and Karratha, the councils with some contributions from the mining companies, have built big recreational facilities with basketball courts, pools and gyms.

The growing demand for health and fitness lifestyle coordinators to work on remote mine sites is part of continued efforts to improve the physical health and nutrition of employees. Both Sodexo and competing services company Morris Corporation, have been advertising for health and lifestyle coordinators to promote health and fitness at remote sites to cater for increased demand<sup>54</sup>.

### 3.1.5 Regulatory Requirements

Although not mandatory, Fitness Australia and Physical Activity Australia provide registration for fitness professionals.

Fitness professionals registered with Fitness Australia are allocated a level (Level 1 – Introductory; Level 2 – Intermediate; and Level 3 – Advanced) based upon their education experience, their qualification held, and the number of years of registration. Registration provides the consumer, employers and the registered individual with:

- Proof of qualifications and competency to work as a fitness instructor or personal trainer
- Assurance and confidence of the expertise to perform a job, and that the individual meets national industry standards and the exercise professional code of ethics

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<sup>51</sup> Business News Western Australia. Jetts' Trajectory Taking Off. 13 September 2013

<sup>52</sup> WA Today. Fitness a weighty issue for the change face of FIFO. 20 November 2013.

<sup>53</sup> Australasian Leisure Management Magazine. Article: Across the Country. March/April 2015

<sup>54</sup> Business News WA Article: Health strides for FIFO workers 17 November 2014.

Employers and consumers refer to Fitness Australia's registration as a mark of professional competency and quality.

### **3.1.6 Gender/ Age Participation**

The Australian Fitness Industry Report 2012 revealed that of the 30,000 exercise professionals registered in Australia with Fitness Australia and Physical Activity Australia, only 4% are over the age of 55 years.

Among exercise professionals, the age profile is disproportionately skewed towards younger workers. However, due to the greater higher education requirements, there is very little employment of those aged 15–19<sup>55</sup>.

30,000 exercise professionals are registered in Australia with Fitness Australia and Physical Activity Australia. Over half are women. Almost two thirds are aged between 22-39 years. Recent trends in employment growth indicate an increase of 7.2% (variable) in the number of exercise professionals<sup>56</sup>.

Approximately 56% of fitness professionals are female (16,749), and 44% male (13,126). Almost two thirds (62%) of fitness professionals are aged between 22 to 39 years, with only 4% over the age of 55 years<sup>57</sup>.

The Australian Government Job Outlook report reveals the largest age profile of Fitness Instructors as being between 25-34 years (31.1%) and the median age is 32 years (compared to 40 years for all occupations<sup>58</sup>).

### **3.1.7 Under-represented Groups Participation**

The Australian Fitness Industry Report 2012 revealed that of the 30,000 exercise professionals registered in Australia with Fitness Australia and Physical Activity Australia, only 4% are over the age of 55 years.

According to the Australian Bureau of Statistics, 164 Aboriginal or Torres Strait Islanders were employed in Australia as Fitness Instructors in 2011<sup>59</sup>. There were also only 24 Aboriginal or Torres Strait Islanders employed as Fitness Centre Managers. To ensure an inclusive fitness environment for all Australians, Fitness Australia has developed a Reconciliation Action Plan October 2014 – October 2016 to assist with growth in workforce numbers and opportunities available to Aboriginal and Torres Strait Islander Exercise Professionals in urban, regional and remote settings<sup>60</sup>.

## **3.2 Major Challenges and Barriers**

Turnover in the fitness industry has been estimated to be approximately 18 months for most new graduates. Early morning and evening shifts are common as this is when the majority of working clients will require fitness activities. Of note 68% of the workforce remains casually employed. This factor has been identified as significantly contributing to the high level of turnover of staff within the fitness industry<sup>61</sup>.

Factors associated with the high level of turnover in staff and the level of professionalism within the fitness industry has been previously discussed in this report. In addition to these factors this

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<sup>55</sup> Service Skills Australia Sport, Fitness, Outdoor and Community Recreation Environmental Scan 2012

<sup>56</sup> Deloitte Access Economics. The Australian Fitness Industry Report 2012.

<sup>57</sup> Deloitte Access Economics Fitness Industry Workforce Report: 2010 – 2020. January 2012.

<sup>58</sup> Australian Government Job Outlook: Fitness Instructors. Accessed from: <http://joboutlook.gov.au/jouploads/4521.pdf> 23 July 2015

<sup>59</sup> Australian Bureau of Statistics 4148.0 Employment in Sport, Australia, 2011. Released 19 November 2012.

<sup>60</sup> Fitness Australia. Reflect/Innovate. Reconciliation Action Plan October 2014 – October 2016.

<sup>61</sup> Deloitte Access Economics. The Australian Fitness Industry Report 2012.

survey indicated that businesses were becoming increasingly focused on measures to lift staff retention levels.

These measures include:

- Increasing permanent staff (translations from casuals);
- identifying and promoting leaders;
- increased support for staff training and personal development;
- improved management of staff; and
- as needs diversify to specific customer groups, recruiting and training multi-skilled staff with experience in particular niche areas (e.g. fitness for people with disabilities).

A Fitness Workforce report released in January 2012 by Deloitte Access Economics revealed that stakeholders consulted with for the report stated that the main supply issue for the workforce of fitness professionals is the level of turnover. Reasons for the higher turnover were:

- low levels of remuneration (award wages are generally paid to fitness centre employees);
- lack of a career path – most consider that those in the workforce have limited experience, require additional ‘people skills’ and do not pursue higher qualification levels;
- undesirable hours (e.g. early starts, late finishes, weekend work and split shifts - compared to the ‘glamour’ of the industry portrayed in the media);
- inability to work in a full time capacity; and
- a mismatch of expectations and TV glamour compared to actual roles (some professionals do administrative, sales and other duties (such as cleaning) in addition to providing fitness services).

Due to the physicality, prevalence of casual work and sometimes unclear career pathways, retention has been a problem for the industry. The move towards large gym chains employing staff as contractors has also meant added pressure in personal trainers being able to market themselves to ensure continued client retention. The average length of employment of fitness professionals is one to two years<sup>62</sup>.

### 3.3 New and Emerging Skills

Closer alignment with the allied health industry is creating more opportunities for fitness professionals to work in conjunction with those in health professions. Personal trainers already assist in some instances with rehabilitation exercises and many cater towards niche groups, including the elderly and disabled. This is expected to continue with the ageing of the population. Due to this interaction, relationships between personal trainers and health professionals are starting to emerge. This convergence is expected to continue, as the overall approach to the health sector moves towards promoting preventative health measures. Thus, the fitness sector and personal trainers are being further incorporated into maintaining general health and wellbeing<sup>63</sup>.

While the potential for fitness industry professionals to tap into the growing needs of the health sector presents an enormous opportunity, it comes with challenges and potential risks. Industry stakeholders noted that a key concern is the tendency for some fitness professionals to act and prescribe outside the scope of their capabilities. At present, most fitness professionals are not qualified to provide medical or health advice, for example around diet or physical activity targeted at rehabilitation. For the fitness industry to link with health services, training and qualifications must be enhanced to enable fitness professionals to address clients with special

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<sup>62</sup> Deloitte Access Economics. The Australian Fitness Industry Report 2012

<sup>63</sup> IBISWorld Industry Report OD4195 Personal Trainers in Australia. April 2015.

health needs and enforceable boundaries must be developed to ensure that fitness professionals specialise within their scope and make referrals where necessary<sup>64</sup>.

As needs diversify to specific clients groups, recruiting and training multi-skilled staff with experience in particular niche areas such as fitness for people with disabilities, or older adults will become more prevalent<sup>65</sup>.

There has been a boom in the popularity of higher-intensity training programs, such as CrossFit, Grit and 'boot camp style' events, however with this popularity has come concern<sup>66</sup>. Without proper instruction by appropriately trained and skilled instructors, consumers may be put at risk of acute or chronic injury. This presents a potential need for improved training, education and accreditation of fitness professionals delivering these programs<sup>67</sup>.

As reported in Service Skills Australia's Fitness 2015 Environmental Scan Snapshot, the increasing popularity of outdoor group exercise sessions brings more risks, meaning personal trainers need new skills to:

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

There are emerging opportunities in the industry for personal trainers with advanced skills in working with people affected by chronic conditions, fitness service coordinators, and personal training managers with the skills to lead a team of personal trainers.

### 3.4 Occupations in Demand

The State Priority Occupation List (SPOL) is a list of occupations produced annually by the Department of Training and Workforce Development (DTWD) which are rated according to their identified priority status in Western Australia. More information about the rankings of occupations can be found in the SPOL Summary Paper at:

<http://www.dtwd.wa.gov.au/workforceplanninganddevelopment/occupationlists/spol/Pages/spol.aspx>

FutureNow in consultation with relevant fitness organisations has identified the following as being occupations in demand<sup>68</sup>:

Table 11: State Priority Occupations List – Fitness

State Priority Occupations List (SPOL)		
ANZSCO	Occupation	2015 SPOL Ranking
452111	Fitness instructor	Other identified occupation*
149112	Fitness centre manager	Other identified occupation*

\* Other identified occupations refers to occupations where issues have been identified through consultations undertaken across various industries or regions; however at this current time there is not enough evidence to support the existence of widespread

<sup>64</sup> Deloitte Access Economics Fitness Industry Workforce Report: 2010 – 2020. January 2012.

<sup>65</sup> Deloitte Access Economics. The Australian Fitness Industry Report 2012.

<sup>66</sup> Australasian Leisure Management: Concerns Over Quality of Crossfit Instructor Training. 20 March 2014.

<sup>67</sup> Service Skills Australia Fitness 2014 Environmental Scan Snapshot

<sup>68</sup> Department of Training and Workforce Development. State Priority Occupation List. Accessed from: <http://www.dtwd.wa.gov.au/workforceplanninganddevelopment/occupationlists/spol/Pages/spol.aspx> 17 August 2015.

unmet demand or other, non market factors which would see their elevation to a priority status. These occupations are being closely monitored by DTWD for any evidence which may see them elevated to a priority status in the future.

FutureNow will continue to monitor, and lobby where necessary for the inclusion of the above occupations on future SPOL lists to ensure the continued supply of qualified fitness professionals to meet the needs of the industry.

### 3.5 Workforce Development Opportunities

Stakeholder consultations undertaken by Deloitte Access Economics revealed that there was a general view that graduates have appropriate technical capabilities but need more on-the-job training to develop ‘people skills’. Some stakeholders expressed the view that training should be in the form of an apprenticeship or traineeship. This has been echoed anecdotally through stakeholder conversations in Western Australia. An update to the fitness qualifications contained within the SIS10 Sport, Fitness and Recreation Training Package will make it mandatory for students to complete a minimum number of work experience hours as a requirement to complete their qualification. This will be a step in the right direction to ensuring students have industry exposure to the workplace with the aim for graduates to be more ‘work ready’ prior to seeking employment.

Many fitness professionals, particularly personal trainers, are employed by gyms as contractors or operate as small businesses. This means that they need to manage their own client base and marketing. While online platforms such as social media provide extremely cost effective ways of marketing and keeping clients engaged, fitness professionals need the ability to stay on top of new technologies to take advantage of them<sup>69</sup>.

It is mainly the ‘soft skills’ that are reported to be in short supply in the fitness industry<sup>70</sup>. In fitness, the most important of these are relationship management, client retention, and the ability to coordinate with medical and allied health professionals.

### 3.6 VET Training Data by Qualification – Enrolments and Completion

Table 12: VESU Institutional-based Course Enrolments in Fitness Qualifications

Course Enrolments	2012	2013	2014
SIS30310 Certificate III in Fitness	270	463	310
SIS30313 Certificate III in Fitness	0	0	308
SIS40210 Certificate IV in Fitness	150	288	323
SIS50210 Diploma of Fitness	0	0	16
<b>TOTAL</b>	<b>420</b>	<b>751</b>	<b>957</b>

Table 13: TRS Traineeship Commencements in Fitness Qualifications

Traineeship Commencements	2012	2013	2014	2015 (as at April 2015)
Certificate III in Fitness (SIS30310)	31	6	6	0
Certificate III in Fitness (SIS30313)	0	2	9	2
Certificate IV in Fitness (SIS40210)	1	4	1	1
<b>TOTAL</b>	<b>32</b>	<b>12</b>	<b>16</b>	<b>3</b>

<sup>69</sup> Service Skills Australia Fitness 2015 Environmental Scan Snapshot

<sup>70</sup> Service Skills Australia Fitness 2015 Environmental Scan Snapshot

Table 14: TRS Traineeship Completion in Fitness Qualifications

Completions	2012	2013	2014	2015 (as at April 2015)
Certificate III in Fitness (SIS30310)	4	7	3	3
Certificate III in Fitness (SIS30313)	0	0	0	0
Certificate IV in Fitness (SIS40210)	1	1	2	0
<b>TOTAL</b>	<b>5</b>	<b>8</b>	<b>5</b>	<b>3</b>

Graduates of the Certificate III in Fitness are qualified to work as Gym Instructors or Group Instructors, although many fitness organisations only hire Certificate III as Group Instructors. There are three areas of specialisation available under the Certificate III in Fitness: Exercise Instructor – Gym, Exercise Instructor – Group Exercise and Exercise Instructor – Aqua. In order to work as a personal trainer, fitness professionals must obtain the Certificate IV in Fitness. The Diploma of Fitness allows for specialisation for working with special conditions and population groups.

In Western Australia 471 students enrolled in a Certificate III in Fitness and 290 a Certificate IV in Fitness through a state funded Training provider. The majority of training is undertaken institutionally with only low numbers recorded commencing and completing fitness traineeships.

Table 15: School Curriculum and Standards Authority VETiS Statistics for Fitness Qualifications (2013 and 2014)

Code	Qualification	2013		2014	
		Full qualification completion	Partial qualification completion	Full qualification completion	Partial qualification completion
SIS30310	Certificate III in Fitness	5	3	7	2
SIS30313	Certificate III in Fitness	0	0	0	3
SIS40210	Certificate IV in Fitness	1	1	2	0
<b>TOTAL</b>		<b>6</b>	<b>4</b>	<b>9</b>	<b>5</b>

Certificate III and IV in Fitness qualifications are not recommended to be delivered to school students, and have been allocated a red light on the VETiS register.

### 3.7 Higher Education Pathways (where applicable)

Informally, universities will usually require a minimum Certificate IV level qualification as entry into a Bachelor level course. Diploma level qualifications may attract course credits dependent on the chosen course of study. The following formal higher education pathways are in place by RTO's and universities:

Central Institute of Technology students who have completed a Diploma of Fitness will be given 60 credit points as recognition of prior learning towards the Edith Cowan University degree Bachelor of Science (Exercise and Sports Science)

### 3.8 Industry Issues Bullet Points:

- There is high staff turnover within the industry and issues with retention of staff due to the physical workload many roles require, and the long working hours
- The quality of graduates anecdotally has been an issue for employers with feedback received that they lack work-readiness when they are first employed
- The fitness industry is often not seen as a long-term career (industry image)
- There is a greater need for fitness professionals with skills to work with special populations (older adults, children, people with a disability)
- The fitness industry is experiencing an increase in personal trainers employed as contractors by large gym chains. This is changing the skills typically needed by people employed in these positions (i.e. greater need for marketing, promotion, and small-business management to attract and retain clients)

## SECTION 3 INDUSTRY PROFILE – Outdoor Recreation

### 3.1 Overview of the Outdoor Recreation Industry

#### 3.1.1 Industry Analysis

The outdoor recreation includes: outdoor education, adventure therapy, adventure tourism, camping, community, clubs and commercial operations.

A report by Service Skills Australia revealed a 66% increase in the number of outdoor instructors between 2006 and 2011, including a boom in paddling, climbing and caving qualifications awarded. In Western Australia, there was an increase of 72% in the number of people employed as outdoor adventure instructors between 2006 and 2011, from 65 to 112<sup>71</sup> (see table below). Industry acknowledges that these numbers are understated due to the seasonality of the workforce and the cross over between occupations i.e. this number does not include outdoor educators, occupations that do not have a specific ANZSCO code, or general tourism guides.

Table 16: Outdoor Recreation Occupations, ABS 2006-2011 Comparison

Occupation	Western Australia 2006 Total	Western Australia 2011 Total	% Increase/ Decrease	Australia 2011 Total
452212 Fishing Guide	4	6	+50%	108
452215 Outdoor Adventure Instructor	65	112	+72%	1,383
452216 Trekking Guide	4	0	-100%	23
452299 Outdoor Adventure Guides nec(a)	16	31	+94%	344
452311 Diving Instructor (Open Water)	55	71	+29%	567
452314 Snowsport Instructor	7	5	-29%	551

Source: Australian Bureau of Statistics Employment in Sport, Australia, 2011; Employment in Sport, Australia, 2006

Western Australia is also emerging as an adventure tourism hotspot and popular destination according to the recent article *Aussie workers increasingly looking for adventure*<sup>72</sup>.

#### 3.1.2 Industry Trends

The increased attraction of eco-tourism and Australia's continued marketing as a nature tourism destination is resulting in an increased demand for outdoor recreation activities. Adventure tourism research has found that experience seekers make up 49% of visitors to Australia, and that 'nature' was the number one experience that motivates visitors to come to Australia. Together, these indicate that the provision of quality nature-based activities is a key drawcard for Australia's significant tourism industry. The WA Tourism Council has identified Adventure Tourism as a major opportunity to increase tourism in WA. "With vast natural assets, it's time to capitalise on adventure as a hallmark experience<sup>73</sup>."

A flow-on effect of this is that there is a steady shift in regulation of the sector to both manage the inherent risk involved in the associated activities, as well as ensure there are adequate initiatives to improve service standards<sup>74</sup>.

<sup>71</sup> Australian Bureau of Statistics Employment in Sport, Australia, 2011. Released 22 October 2013.

<sup>72</sup> News.com.au. Aussie Workers Increasingly Looking for Adventure. 11 July, 2013.

<sup>73</sup> Tourism Council WA. Destination Perth - Developing Perth's Visitor Economy. March 2014.

<sup>74</sup> Service Skills Australia 2014 Sport, Fitness and Recreation Environmental Scan

A shift away from structured sporting environments towards extreme sport and recreation activities, or adventure based activities is on the increase<sup>75</sup>. Adventure guides are also one of the nation's fastest growing occupations according to recent articles<sup>76</sup>.

### 3.1.3 Labour and Skill Demand

A recent report by Service Skills Australia reported a growing demand for more volunteer staff with first aid and specialist activity skills.

Also cited were the growing enrolments in school of students studying courses in outdoor education. The value of outdoor recreation has been recognised in the Health and Physical Education learning area of the Australian National Curriculum. This will potentially increase the number of trained staff needed to deliver outdoor education nationally.

Large increases in high-school students studying a Certificate II in Outdoor Recreation (*refer to Table 24 School Curriculum and Standards Authority 2014 Data*) is also having ramifications for the industry as teachers struggle to meet vocational requirements to be an outdoor recreation trainer. The Australian Quality and Standards Framework (AQTF) requires that outdoor recreation trainers are vocationally competent and current to operate within the outdoor sector. The peak industry body Outdoors WA recommends that these teachers have completed a Certificate IV in Outdoor Recreation, or a minimum skill set in the activity they are teaching, to ensure they are adequately qualified and equipped to deliver the lower level outdoor recreation qualifications to students.

There are opportunities in the sector for people with skills in facilitation, communication, relationship management and business management. There is a shortage of local outdoor leaders, which has led some organisations to develop links to overseas training providers to find graduates and increase their pool of candidates<sup>77</sup>. Operators in Western Australia often find they fill vacant positions from candidates who have completed their qualification inter-state or internationally due to the lack of training providers delivering higher level outdoor recreation qualifications in Western Australia.

### 3.1.4 Regional Impact

Outdoor recreation operators and businesses are predominantly located, or run their outdoor recreation activities in the North West (Kimberley, Exmouth, Karijini) and South West (Dwellingup, Margaret River, Dunsborough) regions, with many of the water-based activities located along the Coral Coast region focused on Ningaloo reef/Exmouth. Due to the seasonality of the WA weather, and the peaks and lulls of the tourist season, many businesses will focus their activities within the Perth greater metropolitan region during summer months, and the northwest of the state during the winter months.

Outdoor recreation has been identified as a sector which provides strategic opportunities for the Great Southern due to its natural landscapes and Camp Quaranup base. The Great Southern Regional Blueprint<sup>78</sup> has identified the following opportunities for the community and environment:

- Invest in outdoor recreation and sport precincts in major population centres
- Promote the Great Southern as an outdoor recreation region of excellence
- Invest in nature-based, experience and eco-tourism sector to take advantage of the region's natural assets

National parks in the Great Southern region host outdoor recreation activities and the region has two major 1,000 kilometre trails linking it to Perth: the Munda Biddi Trail for off-road touring

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<sup>75</sup> Australasian Leisure Management, Growth in Extreme Activities as Younger People Move Away From 'Structured' Sport. 4 June, 2013.

<sup>76</sup> News.com.au. Aussie Workers Increasingly Looking for Adventure. 11 July, 2013.

<sup>77</sup> Service Skills Australia Outdoor Recreation 2015 Environmental Scan Snapshot

<sup>78</sup> Great Southern Development Commission. Draft Great Southern Regional Blueprint. February 2015.

cyclists and the Bibbulmun Track for bushwalkers. Much of the region's outdoor activity gravitates to the coast, in surfing, fishing, diving, boating and sailing. Rock climbing, gliding, bushwalking and off-road cycling are all popular activities in the region, due to the excellent natural assets such as the Stirling Range and the Fitzgerald Biosphere.

With the completion of a feasibility study and business plan, an operational model for a Centre of Outdoor Recreation Excellence should be finalised by late 2014.

### **3.1.5 Regulatory Requirements**

Safety in adventurous outdoor recreation is supported by a range of self-regulated industry structures including leader registration, standards and accreditation. Competently trained and qualified leaders are essential to maintain participant safety.

The National Outdoor Leaders Recreation Scheme (NOLRS) for outdoor recreation instructors, leaders and guides is a national scheme administered by the Outdoor Council of Australia that registers outdoor leaders who have the skills, experience and qualifications deemed as being the equivalent to industry standard.

Adventure Activity Standards (AAS) have been developed in WA and identify common safe practice and are the minimum standards for the conduct of group outdoor adventure activities.

All commercial operations in WA National Parks are required to have accreditation via the Australian Tourism Accreditation Program. This accreditation benchmarks against business operations and the WA AAS.

### **3.1.6 Gender/ Age Participation**

According to the Australian Government Job Outlook figures, females make up only 33.4% of outdoor adventure guides. The main age group is 35-44 years (26.1%), and the median age is 34 years (compared to 40 years of all occupations).

### **3.1.7 Under-represented Groups Participation**

Strong opportunities exist for outdoor recreation with Aboriginal groups, particularly with regard to bush adventure therapy, but also links with the tourism industry and helping Aboriginal communities to develop localised tourism enterprises centred around outdoor recreation<sup>79</sup>.

Australian Bureau of Statistics data has revealed only 6 Aboriginal or Torres Strait Islanders were employed as Outdoor Adventure Instructors in 2011. Low numbers were also recorded as being employed as Fishing Guide (3), Whitewater Rafting Guide (3), Outdoor Adventure Guides nec (4), and Diving Instructor (Open Water) with 5<sup>80</sup>.

## **3.2 Major Challenges and Barriers**

There is a lack of training providers delivering outdoor recreation VET qualifications in Western Australia at the level required by industry to fill labour shortage roles. Large numbers of students are undertaking outdoor education and outdoor recreation courses in senior high school, however there remains the lack of a training pathway for them to continue outdoor recreation studies at a Certificate III or IV level if desired. Training providers delivering Certificate III and IV level qualifications are critical to ensuring a continued supply of qualified staff to the industry to address labour shortages.

The seasonality, casualisation of the workforce, and free-lance work is a challenge for ensuring training delivery, and makes the utilisation of trainees for the sector more difficult.

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<sup>79</sup> Outdoor Programs in Remote Aboriginal Communities. Darren Smith. 2011

<sup>80</sup> Australian Bureau of Statistics 4148.0 Employment in Sport, Australia, 2011. Released 19 November 2012.

Industry also reports that the casualised nature of employment also deters some people from entering the industry, or encourages some to exit the industry when they reach a certain life stage<sup>81</sup>.

The small number of higher-level management roles required in the industry is recognised as a factor that limits career progression.

### 3.3 New and Emerging Skills

Greater synergies with the tourism industry and the growth in adventure tourism is resulting in new roles that are a combination of both outdoor recreation and adventure tourism. The sector's breadth across areas such as tourism, education and community services, provides a variety of work settings and an ability to broaden skills, which reflects expertise that are highly transferrable to many other industries.

There is a large demographic of teachers delivering Certificate II in Outdoor Recreation through VET in schools, who require skills gap training or upskilling to ensure they have appropriate industry competency and vocational currency to satisfy both the requirements of the outdoors industry, but also to ensure compliance with the standards for vocational trainers and assessors.

### 3.4 Occupations in Demand

The State Priority Occupation List (SPOL) is a list of occupations produced annually by the Department of Training and Workforce Development (DTWD) which are rated according to their identified priority status in Western Australia. More information about the rankings of occupations can be found in the SPOL Summary Paper at:

<http://www.dtwd.wa.gov.au/workforceplanninganddevelopment/occupationlists/spol/Pages/spol.aspx>

FutureNow in consultation with relevant outdoor recreation bodies and organisations has identified outdoor adventure instructor as being an occupation in demand<sup>82</sup>.

Table 17: 2015 State Priority Occupations List (SPOL) – Outdoor Recreation

State Priority Occupations List (SPOL)		
ANZSCO	Occupation	2015 SPOL Ranking
452215	Outdoor adventure instructor	Other identified occupation*

\* Other identified occupations refers to occupations where issues have been identified through consultations undertaken across various industries or regions; however at this current time there is not enough evidence to support the existence of widespread unmet demand or other, non-market factors which would see their elevation to a priority status. These occupations are being closely monitored by DTWD for any evidence which may see them elevated to a priority status in the future.

FutureNow will continue to lobby for Outdoor adventure instructor to be elevated to priority status in the future on SPOL due to the lack of enrolments in Certificate III and IV level qualifications needed to meet the growing requirements for qualified instructors.

<sup>81</sup> Service Skills Australia 2014 Outdoor Recreation Environmental Scan Snapshot

<sup>82</sup> Department of Training and Workforce Development. State Priority Occupation List. Accessed from: <http://www.dtwd.wa.gov.au/workforceplanninganddevelopment/occupationlists/spol/Pages/spol.aspx> 17 August 2015.

### 3.5 Workforce Development Opportunities

There is a lack of training providers delivering outdoor recreation VET qualifications in Western Australia above a Certificate II level. Large numbers of students are undertaking outdoor education and outdoor recreation courses in senior high school (1165 students either fully or partially completed a Certificate II in Outdoor Recreation in 2014), however there remains the lack of a training pathway for them to continue outdoor recreation studies at a Certificate III or IV level if desired. Training providers delivering Certificate III and IV level qualifications are critical to ensuring a continued supply of qualified staff to the industry to address labour shortages.

Skill gaps amongst volunteers working in the outdoor sector are also a challenge for the industry, with many organisations and community groups almost entirely run by volunteers.

While the flexible nature of casual and freelance-style work in the outdoor recreation sector, as well as the seasonality of demand and the type of work involved may be attractive to some, this can prove an impediment to the adoption of workforce development practices.

### 3.6 VET Training Data by Qualification – Enrolments and Completion

Table 18: VESU Institutional-based Course Enrolments for Outdoor Recreation Qualifications

Course Enrolments	2012	2013	2014
SIS20210 Certificate II in Outdoor Recreation	13	51	48
SIS20213 Certificate II in Outdoor Recreation	0	0	13
SIS30410 Certificate III in Outdoor Recreation	1	64	20
SIS30413 Certificate III in Outdoor Recreation	0	0	4
SIS40310 Certificate IV in Outdoor Recreation	0	0	0
<b>TOTAL</b>	<b>14</b>	<b>115</b>	<b>85</b>

Table 19: TRS Traineeship Commencements for Outdoor Recreation Qualifications

Traineeship Commencements	2012	2013	2014	2015 (as at April 2015)
Certificate II in Outdoor Recreation (SIS20213)	0	0	0	1
Certificate III in Outdoor Recreation (SIS30410)	7	5	2	0
Certificate III in Outdoor Recreation (SIS30413)	0	0	0	1
Certificate IV in Outdoor Recreation (SIS40310)	2	3	0	0
<b>TOTAL</b>	<b>9</b>	<b>8</b>	<b>2</b>	<b>2</b>

Table 20: TRS Traineeship Completion for Outdoor Recreation Qualifications

Completions	2012	2013	2014	2015 (as at April 2015)
Certificate III in Outdoor Recreation (SIS30410)	0	4	4	0
Certificate IV in Outdoor Recreation (SIS40310)	0	5	1	0
<b>TOTAL</b>	<b>0</b>	<b>9</b>	<b>5</b>	<b>0</b>

Table 21: School Curriculum and Standards Authority VETiS Statistics for Outdoor Recreation Qualifications (2013 and 2014)

Code	Qualification	2013		2014	
		Full qualification completion	Partial qualification completion	Full qualification completion	Partial qualification completion
SIS20210	Certificate II in Outdoor Recreation	433	410	138	399
SIS20213	Certificate II in Outdoor Recreation	0	0	118	510
SIS30410	Certificate III in Outdoor Recreation	1	0	0	45
<b>TOTAL</b>		<b>434</b>	<b>410</b>	<b>256</b>	<b>954</b>

The majority of VET activity being undertaken in the outdoor recreation sector is at a VET in schools level through the Certificate II in Outdoor Recreation. The next amount of significant activity is through institutional pathways at a Certificate III level (refer to VESU course enrolments) with a two State Training Providers delivering the Certificate III in Outdoor Recreation. Of most concern to the industry are the very low levels of training at a Certificate IV level – the level required to meet the state’s labour shortage of outdoor adventure instructors.

Low levels of commencements and completions of traineeships are also of concern to the industry, as the traineeship model is the preferred method of delivery for the industry.

### 3.7 Higher Education Pathways (where applicable)

A Bachelor of Outdoor Recreation in the School of Health Sciences is delivered through Notre Dame University in Fremantle. The 3 year degree aims to provide essential knowledge, practical skills and leadership opportunities to individuals who want to work in the outdoor industry. Entry to this degree for mature students can be through a Certificate IV level VET qualification.

### 3.8 Industry Issues Bullet Points:

- There are low levels of VET activity at a Certificate III level and higher, resulting of a lack of supply of graduates to fill labour shortages for roles as instructors and guides
- There are large numbers of students completing the Certificate II in Outdoor Recreation in schools, however there is no training pathway for them to continue on in the sector
- There has been a lack of research undertaken into the size, demographics and workforce development needs of the outdoor recreation industry in WA, providing a challenge to understanding the workforce development needs of the sector
- There is a lack of career pathways within the industry. The seasonal nature and demand for services within the industry is a challenge.
- There are difficulties in attracting, developing and retaining a skilled paid and volunteer workforce
- Regional and other accessibility issues (online capacity, delivery structure, Eastern states focus) in relation to workforce development programs and courses
- The WA TAC audit of VETiS delivery has identified critical issues around the delivery of outdoor recreation training in schools. There is a need to invest in the professional development of teachers delivering the training, and to look at improving school and industry connections.

## SECTION 3 INDUSTRY PROFILE – Sport

### 3.1 Overview of the Sport Industry

#### 3.1.1 Industry Analysis

In Western Australia, 501 people were employed as other Sports Coaches or Instructors in 2011 according to ABS statistics collected at the last census. This is the largest employed occupation followed by 484 Sports Centre Managers, 397 Sports Umpires, 241 Gymnastics Coaches or Instructors and 227 Sports Administrators. All sport occupations listed in the census reporting had an increase in the number of people employed, with the exception of Sports Administrators which fell from 499 people employed in 2006 to 484 employed in 2011, and Golfers which decreased from 105 in 2006 to 93 in 2011<sup>83</sup>.

Table 22: Sport Occupations, ABS 2006-2011 Comparison

Occupation	Western Australia 2006 Total	Western Australia 2011 Total	% Increase/Decrease	Australia 2011 Total
139915 Sports Administrator	199	227	+14%	2,265
149113 Sports Centre Manager	499	484	-3%	3,581
452312 Gymnastics Coach or Instructor	192	241	+25%	2,507
452316 Tennis Coach	132	184	+39%	2,428
452317 Other Sports Coach or Instructor	393	501	+27%	4,984
452321 Sports Development Officer	133	138	+4%	1,072
452322 Sports Umpire	318	397	+25%	3,294
452323 Other Sports Official	14	18	+29%	148
452499 Sportspersons nec(b)	56	93	+66%	1,031
452411 Footballer	118	129	+9%	1,609
452412 Golfer	105	93	-11%	1,089
450000 Other Sports and Fitness Workers nfd(c)	102	194	+90%	2,182

Source: Australian Bureau of Statistics Employment in Sport, Australia, 2011; Employment in Sport, Australia, 2006

#### Remuneration

Industry analysis undertaken from results of the 2014 Sport and Recreation Industry Remuneration and Benefits project<sup>84</sup> showed a gender balance of 51% female and 49% male (based on 491 full and part-time roles) with 50% of the workforce possessing length of service of 3 years or less. 72% of the workforce is engaged on a full time basis, and of the 28% part-time workforce, 70% of this group is female. The sport and recreation industry in WA consists of a fairly young workforce, with almost 60% of the workforce aged between 26 and 45 years.

The table below details the number of roles included in each of the main functional areas of the sport and recreation industry<sup>85</sup>:

<sup>83</sup> Australian Bureau of Statistics 4148.0 Employment in Sport, Australia, 2011. Released 22 October 2013.

<sup>84</sup> APEX Human Resources Consultancy 2014/2015 Sport and Recreation Industry Remuneration and Benefits Report

<sup>85</sup> APEX Human Resources Consultancy 2014/2015 Sport and Recreation Industry Remuneration and Benefits Report

Table 23: Sport and Recreation Full and Part Time Employees by Functional Area

Functional Area	Male	Female	Total
Executive Management	28	12	40
Finance	5	34	39
Operations, Events and Competitions	159	154	313
Marketing	16	26	42
High Performance	34	23	57
<b>Total</b>	<b>242</b>	<b>249</b>	<b>491</b>

According to the Sport and Recreation Industry Remuneration and Benefits report, 50% of the full-time workforce earn \$60k per annum or less, with the very high end of the \$50-\$60k range representing the average (median) salary range within the industry. There are fewer females employed in management and senior management roles earning \$100k or more per annum.

### Economic contribution

Sport holds economic significance to Australia. The sports sector directly employs 75,000 Australians, which equates to one per cent of the total workforce<sup>86</sup>. Strong interest in the sports industry in Australia is expected to continue over the next five years, and the sector is expected to grow as a result<sup>87</sup>.

As the nation's largest sporting code, the Australian Football League (AFL) injects \$5 billion a year into the national economy, becoming bigger than Qantas and Coca-Cola Amatil. Football is a major employer with more than 13,800 people (excluding players and umpires), working with the game in some form in roles such as league and club officials, coaches, support staff and development officers, from the AFL down to local leagues<sup>88</sup>.

AFL rights are big money with Foxtel and the Seven Network securing the rights for 6 years for a record breaking \$2.508 billion. The agreement takes them from 2017 to the end of 2022 with Telstra to remain as the digital rights holders for the sport which is seen as crucial for networks to dominate in Melbourne, Adelaide and Perth<sup>89</sup>.

From a Western Australian perspective, the West Coast Eagles chief executive Trevor Nisbett has put the value of AFL to WA at \$650 million a year. The West Coast Eagles themselves as a club has grown from 35 players and 14 full-time staff 25 years ago, to 44 players and 105 staff for the beginning of the 2014 season<sup>90</sup>. The Fremantle Dockers have also grown from 86 staff in 2003, to 127 staff in 2013. The net economic contribution of 23 AFL games in Perth in 2013 was \$76.3 million.

### Infrastructure

There is a continued focus on investment in sporting infrastructure in WA, with a number of major projects underway or planned. The largest of these is the new Perth Stadium and Sports Precinct due to be open in time for the start of the 2018 AFL season. The multi-purpose new Perth Stadium will seat 60,000 people, with the option to add up to 10,000 additional seats. The

<sup>86</sup> The future of Australia sport. Australian Sports Commission and CSIRO, 2013.

<sup>87</sup> IBISWorld Industry Report X0028 Sports in Australia, March 2013

<sup>88</sup> The West Australian. Footy juggernaut keeps bottom lines black. March 13, 2014.

<sup>89</sup> AFL. AFL signs new six-year, \$2.5 billion broadcast rights deal. Accessed from: <http://www.afl.com.au/news/2015-08-18/afl-on-the-verge-of-signing-new-tv-deal> 18 August 2015.

<sup>90</sup> The West Australian. Footy juggernaut keeps bottom lines black. March 13, 2014.

stadium will not only provide a world-class venue for sporting fans in WA, but it will also bring about associated employment benefits with it accommodating an expected peak workforce of 950 during the construction phase, and employment in the hospitality and catering sectors through the provision of 70 food and beverage outlets upon completion<sup>91</sup>. It is anticipated that the new Perth Stadium will also attract a number of interstate tourists, with a greater allocation of seating available for the fans of the visiting AFL teams. It will also be more likely to attract major international sporting events, and as a result international tourists, due to the increased seating capacity and flexible ground and seating arrangements.

Other major sporting infrastructure projects recently planned, underway or recently completed in Western Australia include:

- \$33.7 million invested in the WA Institute of Sport High Performance Centre in order to meet with training requirements of WA's high performing athletes. The centre was opened on April 4, 2015.
- \$26 million to the State Netball Centre to provide a venue for state league netball competition, West Coast Fever training, development squads and community netball activities. The State Netball Centre was officially opened on March 28, 2015.
- \$12.4 million allocated by the State Government towards the community use parts of the \$109 million Cockburn Aquatic and Recreation Facility – a community sport and recreation hub which will also become home to the Fremantle Dockers. The Cockburn Aquatic and Recreation Facility is due for completion in March-April 2017<sup>92</sup>.
- Planned West Coast Eagles Zone, part of the Lathlain Precinct Redevelopment Project. The zone will include the West Coast Eagles new administration and training facilities. All other facilities and buildings within the zone are shared community facilities, including the Community Education Centre, the Community Events and Function Centre and the Interactive Sports and Cultural Centre. The West Coast Eagles are fully funding the redevelopment of the Zone, however complementary funding is being sought across a variety of government and private sources. Timing for development is dependent on the securing of funding commitments to the Town of Victoria Park from State and Federal Government. The West Coast Eagles are keen to be relocated to this site at around the same time that the new Perth Stadium is complete in 2018<sup>93</sup>.

Through the Department of Sport and Recreation's Community Sporting and Recreation Facilities Fund (CSRFF), \$7 million is available for allocation in the 2016/17 funding round, to invest in the development of high-quality physical environments in which people can enjoy sport and recreation<sup>94</sup>.

### 3.1.2 Industry Trends

The shift away from organised sport and physical recreation has been identified as one of the trends likely to shape the Australian sports sector over the next 30 years<sup>95</sup>. As acknowledged as a key challenge in the sport and recreation industry in WA in the Department of Sport and Recreation's Strategic Directions 5, a continual adaptation and innovation of programs and services must occur to:

- deliver more diverse participation options (e.g. new environments, scheduling variations, sport product variations and new pursuits); and

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<sup>91</sup> Ministerial Statement. Winning new Perth Stadium design revealed. July 17, 2014

<sup>92</sup> Ministerial Statement. Cockburn recreation hub construction kicks off. Tuesday 21 July, 2015.

<sup>93</sup> Lathlain Precinct Redevelopment Project: West Coast Eagles Zone. Accessed 22 July 2015 from: <http://lathlainprecinct.com.au/zone/west-coast-eagles-zone>

<sup>94</sup> Department of Sport and Recreation Community Sporting and Recreation Facilities Fund. Accessed from [http://www.dsr.wa.gov.au/funding/facilities-\(csrff\)](http://www.dsr.wa.gov.au/funding/facilities-(csrff)) 21 July 2015.

<sup>95</sup> Australian Bureau of Statistics – Perspectives on Sport, November 2013

- be more inclusive of low participation and new populations (e.g. migrants, indigenous populations, people with a mental illness, seniors, isolated populations, people with a disability).

The ageing population has resulted in sporting organisations needing to adapt their sport to suit older age groups, as well as understand the needs of the senior population when undertaking physical activity<sup>96</sup>.

Sport sector revenue is projected to increase as clubs attempt to increase their membership numbers and work on improving their sponsorship deals<sup>97</sup>. Evidence of this has been seen in Western Australia with sports developing new and innovative ways of luring corporate sponsorship. Sports such as Netball WA have employed additional staff so that it can give more attention to proving the impact of sponsorship deals. Rugby WA has also ramped up efforts to secure corporate sponsors, in a market which is becoming increasingly competitive and challenging<sup>98</sup>.

The growing use of social media is providing both benefits but also challenges for the sports industry in WA. Social media provides greater ease at which to disseminate information to a large number of recipients instantly, however requires that associated policies and guidelines are in place to ensure its correct use and to limit potentially inflammatory behaviour. The SportXchange Project in WA delivered by the WA Sports Federation with the support of the Department of Sport and Recreation and Lotterywest is a not-for-profit initiative which provides a number of services to the industry including specialised social media sport-specific assistance to support the use of media – including website, tablet and smartphone applications.

### 3.1.3 Labour and Skill Demand

Employment within the Sports sector is expected to continue rising slowly, although at a faster pace than in the past five years. Employment growth is expected to mainly come from social clubs, sports betting and sports administrative services<sup>99</sup>.

Western Australia accounts for nearly 10% of business locations and has grown over the past five years as the mining boom as provided a range of new job opportunities. This has subsequently increased demand for sporting clubs, fitness instructors and facility management<sup>100</sup>.

#### Increasing professionalism

Major sporting bodies will need highly-skilled management personnel in order to retain or maximise market share in an increasingly competitive environment. The increasing professionalism of sport participants at the elite level will provide strong growth in the sports coaching and athlete management sectors. The growing sophistication of sports coaching and management in Australia will also provide increasing opportunities to market services from other countries to athletes<sup>101</sup>. The professionalisation of sport is also apparent in the transition away from small and informal community groups to large and formalised structures. The professionalisation of sport has involved an increasing conversion of what was in the past volunteer roles to paid ones, which is believed to be one of the contributing factors to large employment growth in key sport occupations between 2006 and 2011<sup>102</sup>.

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<sup>96</sup> Service Skills Australia Sport 2014 Environmental Scan Snapshot

<sup>97</sup> IBISWorld Industry Report X0028 Sports in Australia, June 2014.

<sup>98</sup> WA Business News. Corporates score more from sports. 23 April 2014.

<sup>99</sup> IBISWorld Industry Report X0028 Sports in Australia, June 2014.

<sup>100</sup> IBISWorld Industry Report X0028 Sports in Australia, June 2014.

<sup>101</sup> The future of Australia sport. Australian Sports Commission and CSIRO, 2013.

<sup>102</sup> Service Skills Australia Sport 2014 Environmental Scan Snapshot

As sport becomes more professional, the workforce needs to develop its human resource management and general business skills. This will assist organisations and clubs that were previously volunteer-run<sup>103</sup>. The WA Department of Sport and Recreation has identified this growing workforce need to develop HR management and general business skills amongst stakeholders in WA, and has implemented a number of initiatives to address this issue. One of these is a *Sport Business Workshop Series*<sup>104</sup> to be held from the end of 2015 until early 2016 and will cover topics such as:

- Governance
- Strategic and operational planning
- Workforce development
- Financial management
- Marketing and sponsorship
- Effective teams

### Volunteers

According to the ABS, it is estimated that over 80% of the sport and recreation workforce is unpaid. The majority of sport volunteers (54% or 925,000) were involved in coaching, refereeing or judging, while the remaining held roles in management or committee positions. Despite playing such a large and vital role in the industry, many volunteers have not undertaken training for their role or are not given enough support. A challenge for the sector is to provide training to volunteers without being onerous on the person's time, or financially unaffordable<sup>105</sup>. The sport and recreation industries often rely on volunteers as members of their governance structures. There is ongoing feedback from industry at a state and national level that many volunteers do not hold an adequate understanding for undertaking these roles. FutureNow undertook a scoping exercise as part of funding received for the Volunteer Investment Project in 2011 which identified five volunteer job roles vital to the running of a State Sporting Association which could be mapped to VET units of competency as a 'skill set' for volunteers. With an estimated 110,000 volunteers supporting WA's sport and recreation industry, volunteer recruitment, training and retention is a high priority<sup>106</sup>.

### Future demand

The decline in national participation rates has focussed sport's attention to increasing community participation in sport. This sees greater demand for sports development officers<sup>107</sup>. DEEWR forecasts growth in employment for sports coaches and officials to increase by 2.1 percent annually to 2015–16. The quality and professionalism of community coaches has been raised as a significant strategy to ensure greater community participation in physical activity<sup>108</sup>. This sentiment has also been echoed in WA, where the role of development officer was cited as the most common role planned for future recruitment for the coming 12-24 month period as recorded in the *State Sporting Associations Learning and Workforce Development Project* report of WA state sporting associations in 2010<sup>109</sup>.

Sports Medicine Australia (WA) reports that Sports Trainers are in high demand during the peak season for winter sports.

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<sup>103</sup> Service Skills Australia Sport 2015 Environmental Scan Snapshot

<sup>104</sup> Department of Sport and Recreation. Sport Business Workshops. Accessed 3 August 2015 from <http://www.dsr.wa.gov.au/support-and-advice/people-development/courses-and-careers/sports-business-workshops>

<sup>105</sup> Service Skills Australia Sport 2014 Environmental Scan Snapshot

<sup>106</sup> APEX Human Resources Consultancy. State Sporting Associations Learning and Workforce Development Project. 2010.

<sup>107</sup> Service Skills Australia Sport, Fitness, Outdoor and Community Recreation Environmental Scan 2012

<sup>108</sup> Service Skills Australia Sport, Fitness, Outdoor and Community Recreation Environmental Scan 2012

<sup>109</sup> APEX Human Resources Consultancy. State Sporting Associations Learning and Workforce Development Project. 2010.

Service Skill Australia's 2015 Sport Environmental Scan snapshot lists skills shortages in the following areas:

- business and governance skills (particularly at the grassroots level)
- community skills
- new product development
- coaching

And the following occupations in demand:

- Sports coach or instructor
- Sports development officer
- Sports administrator (Executive Officer)
- Board and committee members

### **3.1.4 Regional Impact**

Growth in sporting activity and participation, and the need for specialist services to cater for emerging professional athletes in regional areas of Western Australia has seen the development of the South West Academy of Sport (SWAS) in Bunbury, and the Mid-West Academy of Sport (MWAS) in Geraldton. The SWAS provides an individual scholarship program and talent development pathways in Australian Rules Football, cricket, hockey, netball and tennis, supported by top tier coaches, specialist training and athlete support services such as sports psychology and nutrition. The MWAS offers scholarships and programs including: athlete scholarships, coaching scholarships, officiating scholarships, and a coaching effectiveness program.

Regional Western Australia is fast becoming a destination for a variety of sporting bodies to hold their world class events. As well as the enormous benefits a strong local sports community brings, the fastest growing sector in the global travel and tourism industry is sports tourism. Events such as the Busselton Iron Man and 70.3 triathlon event, the Margaret River Pro, the Lancelin Ocean Classic, the Australasian Safari from Carnarvon and the Kalgoorlie Race Round are all regional WA events which attract visitors from all over Australia and the world. As well as the strong economic benefit to the local community, other beneficial factors include media exposure, profile raising opportunities, and the positive impact they have on the local and junior sporting community<sup>110</sup>.

Royalties for Regions will provide \$32.9million in investment initiatives for the sports and recreation industries for the period 2013-14 to 2016-17<sup>111</sup>. Sport has been recognised as a vital part of regional communities and Royalties for Regions will continue to support the Community Sporting and Recreation Facilities Fund to enhance regional sporting facilities and equipment.

Sport and recreation participation is important for sustaining a healthy population and is particularly important for rural and regional communities. Continued investment in major sport precincts and centres in Albany and Mount Barker is required to accommodate future population growth, enhance the sport and recreation options for residents, and support the continued growth of sporting associations in the region. Further investments in sports and recreation facilities are also needed in regional towns across the region<sup>112</sup>.

### **3.1.5 Regulatory Requirements**

The current regulatory, compliance and risk management is creating additional community and sport and recreation specific compliance and regulatory requirements that the Industry has to meet. Examples include child protection, risk management, liquor licensing, GST, financial management and insurance (e.g. Adventure Activity Standards, Working with Children Checks,

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<sup>110</sup> Chamber of Commerce and Industry WA Business Pulse Magazine, The Business World of Sport, February 2015. Article: Sport in Regional WA – More than just fun and games

<sup>111</sup> Department of Regional Development. Royalties for Regions. Investing in a Brighter Future.

<sup>112</sup> Great Southern Regional Blueprint

Occupational Health and Safety laws, excursion policy, grant application and acquittal processes)<sup>113</sup>.

Other regulatory requirements include:

- National Coaching Accreditation Scheme (NCAS) and National Officiating Accreditation Scheme (NOAS) provide competency based training and nationally recognised accreditation to coaches and officials working at all levels of sport. A challenge for Service Skills Australia continues to be obtaining reciprocal recognition with the Australian Sports Commission for Training Package unit of competency skill sets with the national accreditation schemes.

The NCAS is a progressive coach education program. It offers education, accreditation and a nationally recognised qualification to people coaching beginner to elite athletes through the following courses:

- Beginning Coaching General Principles
  - Intermediate Coaching General Principles
  - Advanced Coaching General Principles (under development)
- The NOAS through a General Principles Accreditation program includes general officiating principles, sport specific elements such as technical rules, interpretations and reporting; and practical officiating experience. Courses available include:
    - Introductory Level Officiating General Principles
    - Advanced Level Officiating General Principles
    - Sports Trainer accreditation
- Sports Medicine Australia provides training and accreditation for Sports Trainers. The National Sports Trainers Scheme consists of the following components:
    - Sports First Aid Course
    - Level One Sports Trainers' Course
    - Level Two Sports Trainers' Course

### **3.1.6 Gender/ Age Participation**

Employment in the sports sector is particularly popular with younger people; in 2006, the 15-24 year age group comprised a third of the total employment in the field<sup>114</sup>.

Of respondents to the 2013 Sportspeople Workplace Survey<sup>115</sup>, 18% employed in the sport sector were aged 50 or older, and over a third (34%) were aged under 30.

The Australian Government Job Outlook factsheet for the ANZSCO occupation of Sports Coaches, Instructors and Officials states the main age group is 15-19 years (30.4%) and the median age is 22 years (compared to 40 for all occupations<sup>116</sup>).

A report by Apex HR Consultancy in 2010 of WA State Sporting Associations indicated that of the 500 staff permanently employed, there was almost a 50/50 split of male to female employment in the sector, with 51% male and 49% female.

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<sup>113</sup> Department of Sport and Recreation Strategic Directions 5 (SD5). Strategic Directions for the Western Australian Sport and Recreation Industry 2011-2015.

<sup>114</sup> The future of Australia sport. Australian Sports Commission and CSIRO, 2013.

<sup>115</sup> 2013 Sportspeople Workplace Survey

<sup>116</sup> Australian Government Job Outlook. Sports Coaches, Instructors and Officials (ANZSCO: 4523).

### 3.1.7 Under-represented Groups Participation

#### Female Participation

According to the 2011 Census, 40,244 females were employed in sport and physical recreation occupations in Australia, an increase of 31% compared with the 2006 Census<sup>117</sup>. In 2011, 20% of females working in a sport or physical recreation occupation were employed as a Swimming Coach or Instructor, the second highest occupation employing women, behind Fitness Instructors (32%).

The Australian Government has identified opportunities presented by the reintegration of competitive sport in the education curriculum, and continuing to improve governance arrangements and the number of women in executive roles. This will better prepare national sporting organisations to take the next step to improved commercialisation opportunities of women's elite sport competition.

Increasing the commercialisation potential of women's sport through better governance of national sporting organisations and representation of women in executive roles will support the membership growth of sports and the participation rates of all Australians, promoting a positive sporting culture, providing strong leadership and ultimately contributing to strong, sustainable sports organisations and the broader sport system.

In the Australian sponsorship market, only 7% of funds are directed at women's sport. Despite the increase in women's participation in sport in recent decades, women are still undervalued in sports sponsoring and financing<sup>118</sup>.

The representation of women on the boards of government funded NSOs in 2011 was recorded as 23.5 per cent. The Australian Government will record the gender composition of government funded NSOs boards annually. In the public sector, the Australian Government is leading by example and has committed to achieving a minimum 40 per cent representation of women on Australian Government boards by 2015. As at 30 June 2011, the percentage of women on Australian Government boards was 35.3 per cent an all-time high for the Australian Government.

#### Aboriginal and Torres Strait Islander Participation

According to Australian Bureau of Statistics data from 2011, 120 Aboriginal or Torres Strait Islanders were employed as Footballers, the third highest employing occupation after Greenkeeper and Fitness Instructor. Other notable occupations included Sports Development Officer with 61 employed, Other Sports Coach or Instructor with 48, Sports Administrator with 41, and Sports Umpire with 36<sup>119</sup>.

Cricket in Western Australia experienced an increase in indigenous participation to 6,710 participants through the establishment of programs such as the Milo T20Blast centre at Bidyadanga, 190km south of Broome<sup>120</sup>.

#### Disabled Participation

WA cricketers with disabilities numbered more than 1,000 for the first time, after the introduction of the Dream Cricket inclusion program and a partnership between the WACA and Special Olympics WA<sup>121</sup>.

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<sup>117</sup> Women in Sport: The State of Play 2013. Australian Bureau of Statistics, Perspectives on Sport 2013

<sup>118</sup> 2015 Repucom Women and Sport: Insights into the growing rise and importance of female fans and female athletes

<sup>119</sup> Australian Bureau of Statistics 4148.0 Employment in Sport, Australia, 2011. Released 19 November 2012.

<sup>120</sup> The West Australian. Cricket scorches as WA rides high. August 6, 2015.

<sup>121</sup> The West Australian. Cricket scorches as WA rides high. August 6, 2015.

### 3.2 Major Challenges and Barriers

According to the ABS, it is estimated that over 80% of the sport and recreation workforce is unpaid. The majority of sport volunteers (54% or 925,000) were involved in coaching, refereeing or judging, while the remaining held roles in management or committee positions. Despite playing such a large and vital role in the industry, many volunteers have not undertaken training for their role or are not given enough support. A challenge for the sector is to provide training to volunteers without being onerous on the person's time, or financially unaffordable<sup>122</sup>. In Western Australia, a 2010 report by Apex Human Resources Consultancy found there are approximately 110,000 volunteers engaged in supporting the sporting infrastructure in the state compared to 1,200 paid employees<sup>123</sup>.

Employee retention is an issue faced by the sport industry. Several surveys of national and state sporting organisation paid staff, conducted by Service Skills Australia and the Australian Sports Commission (ASC) revealed there was evidence of high levels of job churn despite many respondents describing a commitment to stay within the sector<sup>124</sup>.

From a Western Australian perspective, a report undertaken by Apex HR Consultancy in 2010 *State Sporting Association Learning and Workforce Development Project* found almost two-thirds of the permanently engaged workforce has length of employment of 3 years or less, with the surveyed State Sporting Associations suffering a staff turnover (attrition) of 47% over the past 24 months. However with 70% of the Associations citing that recruitment from within the industry or from internal promotion was their primary source of recruits, there is clearly a high level of staff rotation within the industry<sup>125</sup>.

Findings from the Service Skills Australia and ASC surveys indicated a lack of defined career pathways within the sector was consistently raised as a concern, which is exacerbated by the typically flat organisational structures of sporting bodies with minimal opportunity for intra-organisation career advancement<sup>126</sup>.

An article by Business News *Rules and regulations stifling sporting growth* reports that television coverage and the proliferation of sports on the internet is the biggest barrier to attracting fans. A panel of the state's elite sporting organisations have all agreed that enhancing the fan experience was looming as a key priority for clubs facing the digital challenge.

Climate change is impacting on the delivery of sport and proving a challenge to clubs, organisations and associations to adapt to its ramifications, and to learn from policies evolving in other outdoor industries. Heat, floods, drought and rising seas will increasingly affect sports facilities and events across the country<sup>127</sup>.

### 3.3 New and Emerging Skills

The increasing professionalism of sport participants at the elite level will provide strong growth in the sports coaching and athlete management sectors. The growing sophistication of sports coaching and management in Australia will also provide increasing opportunities to market services from other countries to athletes<sup>128</sup>.

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<sup>122</sup> Service Skills Australia Sport 2014 Environmental Scan Snapshot

<sup>123</sup> Apex Human Resources Consultancy. State Sporting Associations Learning and Workforce Development Project. August 2010.

<sup>124</sup> Service Skills Australia Sport 2014 Environmental Scan Snapshot

<sup>125</sup> Apex Human Resources Consultancy. State Sporting Associations Learning and Workforce Development Project. August 2010.

<sup>126</sup> Service Skills Australia Sport 2014 Environmental Scan Snapshot

<sup>127</sup> The Climate Institute: Australian sport feels the heat as global temperatures rise. January 31, 2015. Accessed from: <http://www.climateinstitute.org.au/articles/media-releases/australian-sport-feels-the-heat-as-global-temperatures-rise.html> 18 August 2015

<sup>128</sup> The future of Australia sport. Australian Sports Commission and CSIRO, 2013.

The increasing prevalence of social media and the use of social media as a promotional and communication tool by sporting organisations are creating a greater requirement for those in communication or human resources roles to manage and monitor the use of it.

Service Skills Australia's 2015 Sport Environmental Scan Snapshot lists the following occupations as being of emerging needs:

- Inclusions Officers
- Community Development Officers
- Integrity Officers

### 3.4 Workforce Development Opportunities

- Further roll-out of the Department of Sport and Recreation funded Workforce Development Project by JGC Consulting Group for the development of workforce development plans for State Sporting Associations and recreation organisations.
- Provision of training to volunteers to assist in attraction and retention, and training for those in volunteer management roles
- Provision of governance training to improve the professionalism of sports boards, and improve the skills of those in high level management positions

### 3.5 VET Training Data by Qualification – Enrolments and Completion

Table 24: VESU Institutional-based Course Enrolments in Sport and Recreation Qualifications

Course Enrolments	2012	2013	2014
SIS10110 Certificate I in Sport and Recreation	52	0	0
SIS20310 Certificate II in Sport and Recreation	98	123	0
SIS20312 Certificate II in Sport and Recreation	0	2	115
SIS20313 Certificate II in Sport and Recreation	0	0	32
SIS20410 Certificate II in Sport Career Oriented Participation	0	3	0
SIS20510 Certificate II in Sport Coaching	11	0	0
SIS30510 Certificate III in Sport and Recreation	16	16	0
SIS30512 Certificate III in Sport and Recreation	0	0	13
SIS30513 Certificate III in Sport and Recreation	0	0	2
SIS40410 Certificate IV in Sport and Recreation	6	10	0
SIS40412 Certificate IV in Sport and Recreation	0	5	9
SIS40510 Certificate IV in Sport Coaching	33	22	0
SIS40610 Certificate IV in Sport Development	12	21	0
SIS40612 Certificate IV in Sport Development	0	0	110
SIS50510 Diploma of Sport Coaching	17	0	0
SIS50610 Diploma of Sport Development	0	74	0
SIS50612 Diploma of Sport Development	0	0	77
<b>TOTAL</b>	<b>245</b>	<b>276</b>	<b>358</b>

Table 25: TRS Traineeship Commencements in Sport and Recreation Qualifications

<b>Traineeship Commencements</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015 (as at April 2015)</b>
Certificate II in Sport and Recreation (SIS20310)	58	64	0	0
Certificate II in Sport and Recreation (SIS20312)	0	10	67	0
Certificate II in Sport and Recreation (SIS20313)	0	3	15	13
Certificate III in Sport and Recreation (SIS30510)	26	68	2	0
Certificate III in Sport and Recreation (SIS30512)	0	4	18	0
Certificate III in Sport and Recreation (SIS30513)	0	1	22	157
Certificate IV in Sport and Recreation (SIS40410)	10	5	0	0
Certificate IV in Sport and Recreation (SIS40412)	0	0	7	8
Certificate II in Sport Career Oriented Participation (SIS20410)	134	7	0	0
Certificate II in Sport Career Oriented Participation (SIS20412)	0	0	4	5
Certificate III in Sport Career Oriented Participation (SIS30610)	7	15	0	0
Certificate III in Sport Career Oriented Participation (SIS30612)	0	0	12	0
Certificate III in Sport Career Oriented Participation (SIS30613)	0	0	0	19
<b>TOTAL</b>	<b>235</b>	<b>177</b>	<b>147</b>	<b>202</b>

Table 26: TRS Traineeship Completion in Sport and Recreation Qualifications

<b>Completions</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015 (as at April 2015)</b>
Certificate II in Sport and Recreation (SIS20310)	13	60	5	0
Certificate II in Sport and Recreation (SIS20312)	0	0	0	1
Certificate II in Sport and Recreation (SIS20313)	0	0	0	5
Certificate III in Sport and Recreation (SIS30510)	10	65	12	0
Certificate III in Sport and Recreation (SIS30512)	0	0	0	0
Certificate III in Sport and Recreation (SIS30513)	0	0	0	8
Certificate IV in Sport and Recreation (SIS40410)	1	8	1	0
Certificate IV in Sport and Recreation (SIS40412)	0	0	0	3
Certificate II in Sport Career Oriented Participation (SIS20410)	11	16	0	0
Certificate II in Sport Career Oriented Participation (SIS20412)	0	0	0	0
Certificate III in Sport Career Oriented Participation (SIS30610)	7	11	0	0
<b>TOTAL</b>	<b>42</b>	<b>160</b>	<b>18</b>	<b>17</b>

Table 27: School Curriculum and Standards Authority VETiS Statistics for Sport and Recreation Qualifications (2013 and 2014)

Code	Qualification	2013		2014	
		Full qualification completion	Partial qualification completion	Full qualification completion	Partial qualification completion
SIS10110	Certificate I in Sport and Recreation	495	677	34	66
SIS10112	Certificate I in Sport and Recreation	0	0	221	297
SIS10113	Certificate I in Sport and Recreation	0	0	193	170
SIS20310	Certificate II in Sport and Recreation	1109	818	164	132
SIS20312	Certificate II in Sport and Recreation	0	0	757	761
SIS20313	Certificate II in Sport and Recreation	0	0	593	728
SIS20410	Certificate II in Sport Career Oriented Participation	64	23	24	3
SIS20412	Certificate II in Sport Career Oriented Participation	0	0	25	29
SIS20510	Certificate II in Sport Coaching	672	614	100	59
SIS20512	Certificate II in Sport Coaching	0	0	169	257
SIS20513	Certificate II in Sport Coaching	0	0	368	403
SIS30510	Certificate III in Sport and Recreation	91	25	8	3
SIS30512	Certificate III in Sport and Recreation	0	13	41	65
SIS30513	Certificate III in Sport and Recreation	0	0	41	31
SIS30610	Certificate III in Sport Career Oriented Participation	0	46	0	0
SRS20206	Certificate II in Sport (Career-oriented participation)	1	25	0	0
SRS20306	Certificate II in Sport (Coaching)	0	6	0	0
<b>TOTAL</b>		<b>2432</b>	<b>2247</b>	<b>2738</b>	<b>3004</b>

A significant amount of VET in schools activity is currently happening in schools, and will only increase with changes to WACE requirements beginning 2015. The Certificate II in Sport and Recreation has the second highest number of qualifications completions after the Certificate II in Business through VETiS delivery, with 1514 students being awarded a Certificate II in Sport and Recreation in 2014, up from 1109 in 2013. The next highest sport and recreation qualification was the Certificate II in Sport Coaching, with 637 students completing a full qualification, down slightly from 672 students in 2013.

Increases in the number of enrolments are being experienced at higher qualification levels (i.e Diploma).

### 3.6 Higher Education Pathways (where applicable)

Informally, universities will usually require a minimum Certificate IV level qualification as entry into a Bachelor level course. Diploma level qualifications may attract course credits dependent on the chosen course of study. The following formal higher education pathways are in place by RTO's and universities:

- Central Institute of Technology students who have completed a Diploma of Sport Development will be given 60 credit points as recognition of prior learning towards the Edith Cowan University Bachelor of Business course.
- Central Institute of Technology students who have completed a Diploma of Sport Development will be given up to 4 unspecified units as recognition of prior learning towards the University of Southern Queensland Bachelor of Education (Early Childhood) course; up to 7 unspecified units towards the Bachelor of Education (Primary); and up to

1 unspecified unit for the Bachelor of Education (Secondary), Bachelor of Education (Technical and Vocational Education), and Bachelor of Education (Special Education) courses.

### **3.7 Industry Issues Bullet Points:**

- The large number of volunteers sport, recreation and racing clubs and organisations rely on presents a number of workforce challenges around attraction and retention. Despite playing such a large and vital role in the industry, many volunteers have not undertaken training for their role or are not given enough support. A challenge for the sector is to provide training to volunteers without being onerous on the person's time, or financially unaffordable. It is critical that sporting organisations develop best-practice volunteer recruitment and retention strategies, including the use of skilled volunteer coordinators.
- Support and monitoring is needed to ensure the high levels of sport and recreation VET in schools activity is meeting industry requirements and is to an appropriate industry standard. The high rates of non-compliance amongst sport and recreation RTO's reported by TAC from the 2014 Strategic Audit of VET in Schools will require greater investment in the professional development of teachers delivering the training, and to look at improving school and industry connections.
- Focus is needed on the provision of governance skills to ensure that the professionalism of sport as a business continues

## SECTION 3 INDUSTRY PROFILE – Racing

### 3.1 Overview of the Racing Industry

#### 3.1.1 Industry Analysis

All occupations involved in the racing industry experienced a growth in numbers between 2006 and 2011 with the exception of Jockeys which had a slight decrease for 68 in 2006 to 64 in 2011. The greatest increase was in the occupation of Stablehand which increased by 39% from 303 employed in 2006, to 420 employed in 2011<sup>129</sup>.

Table 28: Racing Occupations, ABS 2006-2011 Comparison

Occupation	Western Australia 2006 Total	Western Australia 2011 Total	% Increase/Decrease	Australia 2011 Total
121316 Horse Breeder	112	136	+21%	1,396
361111 Dog Handler or Trainer	53	73	+38%	838
361112 Horse Trainer	283	366	+29%	3,107
452318 Dog or Horse Racing Official	63	64	+2%	533
452313 Horse Riding Coach or Instructor	76	98	+29%	695
452413 Jockey	68	64	-6%	583
841516 Stablehand	303	420	+39%	4,320

Source: Australian Bureau of Statistics, Employment in Sport, 2011; Employment in Sport, 2006

Thoroughbred racing is conducted on a large scale, second only to the US, and according to the Australian Racing Board comprises 386 race clubs, 368 racetracks, 19511 races, 992 jockeys, 3678 trainers and 100743 owners (and syndicate members). Harness racing has 117 race clubs and claims just over 13,000 full-time equivalent jobs. Greyhound racing claims around 30,000 registered participants with between 90-95% classified as hobbyists<sup>130</sup>.

The true size of employment in all three codes is only ever partly captured with the majority of people involved in the industry being self-employed, part-time, transient, or hobbyists. The fortunes of the racing industry are directly tied to the vibrancy and strength of the Australian economy due to ownership structures and that betting on race outcomes remains the basis for industry profit and prizemoney<sup>131</sup>.

The Western Australian Racing Industry relates to all of the entities, individuals and organisations that play a role in the production and consumption of thoroughbred, harness and greyhound racing. This includes all those who are employed in WA within the industry as well as those who consume the end product delivered by the industry<sup>132</sup>.

The Western Australian racing industry plays an important economic and social role, enhancing both individual and community wellbeing. There is an average of more than two thoroughbred, harness or greyhound race meetings held each day in this state; providing employment and entertainment for West Australians and visitors alike. WA Racing Industry Economic and Social Impact Report highlights that thoroughbred racing is the third highest attended sport in Western Australia behind AFL football and motor racing<sup>133</sup>.

Nationally, consumption of harness and greyhound racing is proportionally higher in Western Australia than in any other State or Territory.

<sup>129</sup> Australian Bureau of Statistics, Employment in Sport, Australia, 2011. Released 22 October 2013.

<sup>130</sup> AgriFood Skills Australia Environmental Scan 2015

<sup>131</sup> AgriFood Skills Australia Environmental Scan 2014

<sup>132</sup> Western Australian Racing Industry Economic and Social Impact Report – IER, Racing and Wagering WA, September 2012.

<sup>133</sup> Western Australian Racing Industry Economic and Social Impact Report – IER, Racing and Wagering WA, September 2012.

More than 33,680 people are involved in some capacity in supporting the racing industry in Western Australia. These people rely in part or totality on the racing industry for their livelihood. They are involved in the production of racing animals, as well as the running of race clubs in both administrative and operational roles, Peak Bodies and code operations. Owners (16,745) make up the single largest component of involvement in racing in WA.

The direct impact on employment generated by the activities of the racing industry directly sustains more than 3,540 full time equivalent (FTE) positions each year<sup>134</sup>:

- The thoroughbred racing industry sustains the involvement of 18,218 participants, representing 58% of the entire industry. Participants are split relatively evenly between metropolitan (51%) and regional (49%) areas.
- The harness racing industry sustains the involvement of more than 9,190 participants, representing 29% of the entire industry. Participants are split relatively evenly between metropolitan (52%) and regional (48%) areas.
- The greyhound racing industry sustains the involvement of 3,855 participants, representing 12% of the entire industry. The majority of participants are in the metropolitan areas (where greyhound racing is concentrated).

In addition to this, the Western Australia Racing Industry employs more than 2,400 individuals across its administrative and wagering operations. See table below for a breakdown of WA Racing Industry employment<sup>135</sup>.

Table 29: WA Racing Industry Employment (2012)

<b>Jobs and Participants</b> (West Australians that rely in part or totality on the Racing Industry for their livelihood)	<b>Total</b>
Breeders	4292
Trainers	1692
Owners	16745
Other Employees (i.e. stablehands, trackriders etc.)	4327
<b>Participants in the Production of Racing Animals</b>	<b>27058</b>
Raceclub and Industry Staff	3250
Attendants, Stewards, Vets, Farriers	524
Jockeys and Drivers	166
Volunteers	753
Wagering Staff	1935
<b>Participants in the Production of the Racing Production</b>	<b>6628</b>
<b>Total Employment and Participation</b>	<b>33686</b>

<sup>134</sup> Western Australian Racing Industry Economic and Social Impact Report – IER, Racing and Wagering WA, September 2012.

<sup>135</sup> Western Australian Racing Industry Economic and Social Impact Report – IER, Racing and Wagering WA, September 2012.

Table 30: Racing Statistics, Number of Registered Persons by Code (2014)

Year	Thoroughbreds			Harness			Greyhounds
	Trainers	Jockeys	Apprentices	Trainers	Driver/Trainer	Drivers	Trainers
2009-10	727	85	20	263	425	70	289
2010-11	706	92	22	270	429	68	279
2011-12	680	85	36	251	410	61	295
2012-13	689	88	38	238	370	71	249
2013-14	632	73	29	216	315	56	248

Source: Racing and Wagering Western Australia Industry Status Report 2014

### 3.1.2 Industry Trends

AgriFood has one of the most diversified and rapidly changing workforces in the economy comprising permanent, seasonal, casual and contract workers. Some occupations, such as trainers, jockeys and trackriders in the racing industry are traditionally self-employed, and seasonal employment will always be intrinsic to sectors such as horticulture, wildcatch and agriculture. There is however, a stronger trend of fragmentation as specialist technical and advisory services become more sought after but not necessarily to the point of warranting full employment<sup>136</sup>.

Across Australia, the majority of TABs have been privatised, resulting in racing authorities having less control over the financial performance of their TAB and subsequent impact on racing industry distributions. In Western Australia, the latest indications are that the Government will 'probably' sell the TAB according to the Premier, but it won't be in the first group of asset sales by the Government, with the focus first on selling off land<sup>137</sup>. Betting activity is shifting more towards sports betting, particularly as corporate bookmakers aggressively promote their sports betting products ahead of race wagering products<sup>138</sup>.

Current moves to amalgamate racing clubs are a direct result of economic rationalisation in the industry. Many clubs are situated on land that has grown significantly in value, and are now in the midst of highly sought after residential areas. Councils are also making the keeping of stables in these areas more difficult in town planning, and the combination of these factors will likely see a shift of racing to purpose built facilities in the future<sup>139</sup>.

The technology in the horse and dog racing industry has greatly increased in the area of computerised registration and identification of individual horses and dogs. Identification of horses is extremely important given the strict nature of Australia's quarantine laws, which have been more strictly enforced since the Equine Influenza scare in 2007. Race clubs have also put in new all-weather facilities for the public, and are installing state of the art tracks to allow for safer racing, improved drainage, a more consistent surface, longer life, divot resistance and accelerated turf recovery<sup>140</sup>.

Major technology advances are also apparent through racing wagering. Racing clubs are now placing their races on pay-TV which has allowed for a national TV based betting system to be introduced and has led to substantial increases in phone betting and turnover. Recent trends have also seen many racing clubs moving towards being a year-round use entertainment facility

<sup>136</sup> AgriFood Skills Australia Environmental Scan 2012.

<sup>137</sup> The West Australian. Government probably will sell TAB, says Premier. August 1, 2014.

<sup>138</sup> AgriFood Skills Australia Environmental Scan 2015

<sup>139</sup> Cummings, K. (2010). Future of Horse Racing in Australia

<sup>140</sup> IBISWorld Horse and Dog Racing in Australia Industry Report P9311, November 2009. Back on the horse: The industry is on the road to recovery after several false starts

(and not only for racing) with gaming machines, holding special events (such as animal and horticultural shows) and other functions<sup>141</sup>.

### 3.1.3 Labour and Skill Demand

At the current point in time, the critical labour and skill demand is for the continued supply of Farriers to the market in Western Australia. Polytechnic West, previously the sole RTO delivering the apprenticeship ceased delivery in 2014, however a new RTO from South Australia has since been contracted from Jan 2015. The horse industry is a very large and diverse one with a common need for farriers. Currently there is a shortage of farriers, particularly in regional areas. Any shortage of farriers into the future will have a severe impact on the racing industry (harness and thoroughbred, breeding, recreation and competition). Farriers are also vitally important to the industry to ensure animal welfare issues are addressed.

All regions in WA experience a shortage of trackriders and farriers. Albany and Kalgoorlie (seasonal winter), and Geraldton and Esperance (seasonal summer) in particular.

AgriFood Skills Australia in their 2015 Environmental Scan has revealed chronic skilled labour shortages in core job roles, specifically jockeys and track riders. Labour shortages nationally have also been reported in the occupations of: farriers, greenkeepers, harness drivers, horse trainers, jockeys, race stewards, stablehands and trackriders. The Environmental Scan also lists the increasing demand for, and skilling of casual staff. In particular, the following areas nationally are experiencing skill shortages or are areas of emerging skill needs:

- Equine and canine animal behavior, health and welfare
- Biosecurity – disease prevention, diagnosis and emergency response
- Selective canine breeding
- Small business management
- Track maintenance
- Workplace health and safety

### 3.1.4 Regional Impact

According to the Racing and Wagering WA Economic and Social Impact Report, the thoroughbred racing industry sustains the involvement of 18,218 participants, in WA representing 58% of the entire industry. Participants are split relatively evenly between metropolitan (51%) and regional (49%) areas.

The harness racing industry sustains the involvement of more than 9,190 participants, representing 29% of the entire industry. Participants are split relatively evenly between metropolitan (52%) and regional (48%) areas.

The greyhound racing industry sustains the involvement of 3,855 participants, representing 12% of the entire industry. The majority of participants are in the metropolitan areas (where greyhound racing is concentrated)<sup>142</sup>.

### 3.1.5 Regulatory Requirements

Racing industry licenses are required for jockeys, owners, trainers, trackwork riders, harness racing drivers and stablehands (thoroughbred and harness) and are coordinated through Racing and Wagering WA

Apprentice jockeys are now required to complete the Certificate IV in Racing (Jockey) prior to applying for a Jockey's license. Harness Drivers are required to complete a skill set from the Certificate IV in Racing (Harness Race Driver) prior to being licensed as a B Grade Race Driver.

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<sup>141</sup> IBISWorld Horse and Dog Racing in Australia Industry Report P9311, November 2009. Back on the horse: The industry is on the road to recovery after several false starts

<sup>142</sup> Racing and Wagering WA. Social Impact Final report. September 2012.

*In both cases, obtaining the qualification is not an automatic guarantee of a licence as other factors are taken into account.*

Treatment of sporting animals before, during and after their racing career is again under the spotlight following high profile animal welfare campaigns. The Australian Racing Board has introduced national regulations to capture enhanced information on thoroughbred racehorses' transition to life after racing<sup>143</sup>.

### **3.1.6 Under-represented Groups Participation**

As stated in Australian Bureau of Statistics Employment in Sport 2011, the occupation of Stablehand employed the highest number of Aboriginal or Torres Strait Islanders with 54. 24 were recorded as Horse Trainers, 14 as Dog Handlers or Trainers, 10 as Horse Breeders, 8 as Jockeys, and 4 as Dog or Horse Racing Officials<sup>144</sup>.

Women are an under-represented group in the occupation of jockey. Currently 25% of riders are female, however this number has increased over previous years and evidenced in the statistic that 48% of apprentice jockeys are female<sup>145</sup>. 15 years ago, under 5% of riders were female.

## **3.2 Major Challenges and Barriers**

There is a need for funding of skill sets which would then enable racing industry licensing to be linked to skill set training. There is low uptake of VET training in the racing industry so further promotion of the opportunities available and the value of undertaking nationally accredited training would go some way to breaking down barriers.

Racing in particular has a very low uptake of training and a lack of recognition of qualifications. The majority of employers do not require a qualification or skills set for licensing, nor do they look to employ 'qualified' people. Training is either undertaken on-the-job or they employ already skilled people. Skill sets funding is a method which would suit the racing industry, particularly for existing workers specifically in the occupations of horse trainers, trackriders, stablehands, steward and club administrators.<sup>146</sup>

There are plans in place to radically restructure Greyhound racing in WA, to cease the losses of millions of dollars due to high overheads and decreasing on-course betting turnover. The WA Greyhound Racing Association will make about 14 people redundant, reducing its staff from 39 full-time employees to around 25<sup>147</sup>.

## **3.3 New and Emerging Skills**

The embedding of integrity operations and management training is seen as a vital step towards improving the image and credibility of the industry as a result of recent animal cruelty practices which have come to light in the media.

Within racing, emergence of 'equine welfare' roles is seeing industry take a more active role in racehorse re-homing through the transition of non-performing racehorses to other off-track purposes – for example the police force and dressage<sup>148</sup>.

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<sup>143</sup> Agrifood Skills Australia Environmental Scan 2015

<sup>144</sup> Australian Bureau of Statistics 4148.0 Employment in Sport, Australia, 2011. Released 19 November 2012.

<sup>145</sup> Australian Jockeys' Association. Racing for Equality – The Rise of Women Jockeys and how the Industry can Catch up

<sup>146</sup> Service Skills Australia Sport, Fitness, Outdoor and Community Recreation Environmental Scan 2010

<sup>147</sup> The West Australian: Greyhound racing set for major overhaul. April 15, 2015

<sup>148</sup> AgriFood Skills Australia Environmental Scan 2012.

### 3.4 Occupations in Demand

The State Priority Occupation List (SPOL) is a list of occupations produced annually by the Department of Training and Workforce Development (DTWD) which are rated according to their identified priority status in Western Australia. More information about the rankings of occupations can be found in the SPOL Summary Paper at:

<http://www.dtwd.wa.gov.au/workforceplanninganddevelopment/occupationlists/spol/Pages/spol.aspx>

FutureNow in consultation with relevant racing organisations has identified the following as being occupations in demand<sup>149</sup>:

Table 31: State Priority Occupations List – Racing

State Priority Occupations List (SPOL)		
ANZSCO	Occupation	2015 SPOL Ranking
36112	Horse trainer	Other identified occupation*
841516	Stablehand, Trackrider	Other identified occupation*
322113	Farrier	Other identified occupation*

*\* Other identified occupations refers to occupations where issues have been identified through consultations undertaken across various industries or regions; however at this current time there is not enough evidence to support the existence of widespread unmet demand or other, non market factors which would see their elevation to a priority status. These occupations are being closely monitored by DTWD for any evidence which may see them elevated to a priority status in the future.*

In regards to comment around the occupation of Farrier on SPOL 2015, The Department of Training and Workforce Development note that there are concerns regarding Polytechnic West's withdrawal from delivery of the apprenticeship. This occupation will be monitored to see the impact of the South Australian RTO's (Educational Services and Consultants Pty Ltd) involvement in the industry over the coming years. This occupation is currently on a watch list for reassessment in the future.

FutureNow will continue to monitor, and lobby where necessary for the inclusion of the above occupations on future SPOL lists to ensure the continued supply of qualified racing professionals to meet the needs of the industry.

### 3.5 Workforce Development Opportunities

There is an opportunity to link a number of the skill sets contained within the RGR08 Racing Training Package to licenses required in Western Australia. This would ensure that there is consistency in skills across the industry, and also have the added advantage of providing the license recipient with a nationally recognised skill set. This has also been identified by AgriFood Skills Australia as a trend to impact upon the racing industry in Australia, but also a workforce development opportunity by using the growth in industry licensing and compliance requires to drive skills development.

There is a need to attract, train and retain workers in all key job roles, as well as establishing innovative and productive job roles, supported by meaningful career paths.

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<sup>149</sup> Department of Training and Workforce Development. State Priority Occupation List. Accessed from: <http://www.dtwd.wa.gov.au/workforceplanninganddevelopment/occupationlists/spol/Pages/spol.aspx> 17 August 2015.

### 3.6 VET Training Data by Qualification – Enrolments and Completion

Table 32: VESU Institutional-based RGR08 Racing Industry Course Enrolments

Course Enrols as values	2012	2013	2014
RGR20108 Certificate II in Racing (Stablehand)	0	0	1
RGR30108 Certificate III in Racing (Trackrider)	7	7	10
RGR30208 Certificate III in Racing (Advanced Stablehand)	26	18	23
RGR40108 Certificate IV in Racing (Racehorse Trainer)	1	0	0
RGR40208 Certificate IV in Racing (Jockey)	0	0	0
RGR40308 Certificate IV in Racing (Harness Race Driver)	0	0	0
<b>TOTAL</b>	<b>34</b>	<b>25</b>	<b>34</b>

Table 33: TRS Traineeship Commencements in Racing Qualifications

	2012	2013	2014	2015 (as at April 2015)
Certificate II in Racing (Stablehand) (RGR20108)	2	5	0	0
Certificate III in Racing (Advanced Stablehand) (RGR30208)	5	2	1	0
Certificate III in Racing (Trackrider) (RGR30108)	10	8	5	3
Certificate IV in Racing (Harness Race Driver) (RGR40308)	0	1	0	0
Certificate IV in Racing (Jockey) (RGR40208)	7	12	8	3
<b>TOTAL</b>	<b>24</b>	<b>28</b>	<b>14</b>	<b>6</b>

Table 34: TRS Traineeship Completion in Racing Qualifications

	2012	2013	2014	2015 (as at April 2015)
Certificate II in Racing (Stablehand) (RGR20108)	2	1	5	0
Certificate III in Racing (Advanced Stablehand) (RGR30208)	0	0	1	0
Certificate III in Racing (Trackrider) (RGR30108)	6	7	5	1
Certificate IV in Racing (Harness Race Driver) (RGR40308)	1	0	0	0
Certificate IV in Racing (Jockey) (RGR40208)	6	7	0	2
<b>TOTAL</b>	<b>15</b>	<b>15</b>	<b>11</b>	<b>3</b>

Table 35: TRS Apprenticeship Commencements in Farriery Qualification

	2012	2013	2014	2015 (as at April 2015)
Certificate III in Farriery (ACM30510)	5	5	0	2

Table 36: TRS Apprenticeship Completion of Farriery Qualifications

	2012	2013	2014	2015 (as at April 2015)
Certificate III in Farriery (ACM30510)	0	0	4	0

Table 37: School Curriculum and Standards Authority VETiS Statistics for Racing Qualifications (2013 and 2014)

Code	Qualification	2013		2014	
		Full qualification completion	Partial qualification completion	Full qualification completion	Partial qualification completion
RGR20108	Certificate II in Racing (Stablehand)	0	3	7	0
RGR30108	Certificate III in Racing (Trackrider)	1	0	0	0
<b>TOTAL</b>		<b>1</b>	<b>3</b>	<b>7</b>	<b>0</b>

Historically, VET figures for racing qualifications are low; however greatest activity is seen in the trackrider, jockey and advanced stablehand courses.

### 3.7 Higher Education Pathways (where applicable)

Not applicable

### 3.8 Industry Issues Bullet Points:

- The continued supply of qualified farriers to the racing and great horse industries is of critical importance
- The racing industry is keen to link licensing to qualifications and skill sets, however cost and the current standard of training are of a concern
- Strategies for the attraction, training and retention of workers in all key job roles
- There is concern regarding the standard of training delivery for racing industry stablehands and trackriders resulting in industry preferring to employ unqualified people and train in-house instead of looking to the vocational system to assist in providing skilled employees. This leads to OH&S concerns in an industry with high risk
- Employers (racing and farriers) find the cost of vocational training is an impediment to utilising the vocational training system to provide skilled employees. Racing industry employers and farriers are predominantly very small businesses, (mostly less than 5 employees) making industry support financially cost prohibitive

## SECTION 4 INDUSTRY ISSUES AND STRATEGIES

### Skilling WA: Strategic goal 1

Increase participation in the workforce particularly among the under-employed and disengaged, mature-aged workers, Aboriginal and Torres Strait Islander and other under-represented groups

Issue (from Section 3)	Strategy	Actions	Skilling WA Priority Action
<p>1. Female under-representation in some sport, recreation and racing occupations or volunteer roles.</p> <p>Of particular concern to the racing industry is the number of female jockeys who retire earlier than their male counterparts in the main. Management of jockey numbers will be critical over the next 10 years</p>	<p>Monitor changes in gender balance and act where necessary to ensure industry demands are met</p>	<p>FutureNow in conjunction with industry bodies to promote careers options to females in industry areas, or on boards, which in the past have been male dominated.</p> <p>FutureNow to liaise with RWWA and training organisations to ensure the continued adequate supply of jockeys to the industry to meet demand</p>	<p>1.1 1.1.02</p>
<p>2. The ageing workforce is anticipated to create future skill shortages in some areas of the racing and aquatics industry.</p>	<p>Identify opportunities to promote flexible working arrangements for the older workforce</p>	<p>FutureNow to work with industry in promoting the continued opportunity for employment of older worker to retain knowledge through part-time work and mentoring new entrants.</p>	<p>1.5 1.5.01</p>
<p>3. Aboriginal people are under-represented in the employment figures of the Western Australian sport, recreation and racing industries.</p>	<p>Develop sustainable training to employment pathways for Aboriginal people</p>	<p>FutureNow to work with industry bodies to develop sustainable training to employment pathways especially in regional and remote WA for Aboriginal populations, building on the sporting skills and abilities of the Indigenous people</p>	<p>1.4</p>

List **only** the industry key issues and strategies (up to 3 years) pertaining to this Strategic Goal

**Skilling WA: Strategic goal 2**

Supplement the Western Australian workforce with skilled migrants to fill employment vacancies unable to be filled by the local workforce and address those factors which support a growing population.

<b>Issue (from Section 3)</b>	<b>Strategy</b>	<b>Actions</b>	<b>Skilling WA Priority Action</b>
1. There is a need to source skilled migrants especially in the occupation of trackrider as the industry struggles to fill training places locally to meet demand, particularly regional areas of Western Australia	Ensure the continued supply of migrant track riders to Western Australia	FutureNow to work with Racing and Wagering WA to ensure trackrider remains on relevant skilled migration lists	2.2 2.2.01, 2.2.02

List **only** the industry key issues and strategies (up to 3 years) pertaining to this Strategic Goal.

**Skilling WA: Strategic goal 3**

Attract workers with the right skills to the Western Australian workforce and retain them by offering access to rewarding employment and a diverse and vibrant community and environment to live in.

<b>Issue (from Section 3)</b>	<b>Strategy</b>	<b>Actions</b>	<b>Skilling WA Priority Action</b>
1. An unrealistic industry image around some occupations within the sport, recreation and racing industries creates a labour churn and high employee attrition.	Promote and provide realistic careers information on the sport, recreation and racing industries	FutureNow to work on providing a more realistic industry image when promoting the sport, recreation and racing industries in regards to pay and conditions, competitive/high demand occupations etc.  FutureNow to provide accurate but realistic industry information in key state priority occupations.  FutureNow to work with relevant peak industry bodies to look at reasons for high staff turnover in some industry areas (aquatics and fitness in particular) and non-renewal of industry licenses or accreditations	3.4 3.4.07 3.4.06

List **only** the industry key issues and strategies (up to 3 years) pertaining to this Strategic Goal.

## Skilling WA: Strategic goal 4

Provide flexible, responsive and innovative education and training which enables people to develop and utilise the skills necessary for them to realise their potential and contribute to Western Australia's prosperity.

Issue (from Section 3)	Strategy	Actions	Skilling WA Priority Action
<p>1. There is a shortage of outdoor recreation instructors in WA, resulting from a lack of training providers delivering Certificate III and IV level outdoor recreation qualifications</p>	<p>Identify potential industry/RTO partnerships to increase delivery of Cert III and IV Outdoor Recreation qualifications</p>	<p>FutureNow to work with the industry peak body Outdoors WA, the Department of Sport and Recreation and registered training organisations to develop a whole of industry training plan that will address the specific areas of labour shortages</p>	<p><b>4.4</b> <b>Carried forward to section 5</b></p>
<p>2. Anecdotal feedback from industry states the work readiness of graduates is inadequate for the workplace. (Especially the fitness industry)</p>	<p>Encourage greater industry participation in training package development and reviews to ensure content required by industry is incorporated</p>	<p>FutureNow to increase industry participation in training processes by:</p> <ul style="list-style-type: none"> <li>• inviting feedback into training package reviews and continuous improvement by organisations</li> <li>• Lobbying and supporting mandated work placement requirements for certain qualifications</li> </ul>	<p>4.4 4.4.08</p>
<p>3. The Farrier industry is crucial to a viable racing and equine industry yet in WA is a thin market for apprenticeship training.</p>	<p>Ensure the continuation of the farriery apprenticeship in WA</p>	<p>FutureNow will liaise with this RTO, together with Racing and Wagering WA and industry farriers to monitor the delivery of the apprenticeship in WA to ensure the continued supply of qualified farriers.</p> <p>FutureNow to advocate for the State Government to continue support for the provision of thin market apprenticeship training</p>	<p><b>4.5</b> <b>Carried forward to section 5</b></p>
<p>4. Large increases in VET in school delivery for sport and recreation qualifications is currently being experienced, with numbers likely to</p>	<p>Monitor the amount and quality of sport and recreation VETiS delivery</p>	<p>FutureNow to communicate with SCSA, RTO's and school VET coordinators to identify current and planned sport and recreation VETiS delivery. Specifically to:</p>	<p><b>4.3</b> <b>Carried forward to section 5</b></p>

<p>increase substantially with the introduction of new WACE requirements in 2015</p>		<ul style="list-style-type: none"> <li>• track increases/decreases in VETiS enrolments,</li> <li>• liaise with industry on possible ramifications,</li> <li>• identify any issues (e.g identified areas of non-compliance from the 2014 TAC VETiS Strategic Audit)</li> <li>• and determine appropriate action</li> </ul>	
<p>5. There are historically low levels of VET qualifications held by people working within the racing industry</p>	<p>Increase the professionalism of the racing workforce by linking industry licenses to units of competency/skill sets/qualifications</p>	<p>FutureNow to work with Racing and Wagering WA to assist with the process of linking licensing to mandatory units/skill sets or qualifications. FutureNow to investigate possible funding sources to assist with the development of resources etc to support the process</p>	<p>4.4</p>
<p>6. Career pathway advisory professionals appear to be unaware of the full range of training and career opportunities available within the sport, recreation and in particular racing industries.</p>	<p>Ensure career pathway advisors are adequately supported with sport, recreation and racing careers information</p>	<p>FutureNow to provide school career advisors and VET coordinators with flyers developed to identify sport, recreation and racing careers and associated training pathways available.</p> <p>FutureNow to provide advice and feedback on related occupations to Miles Morgan, the company contracted to update the Career Profiles located on the Career Centre's website</p>	<p>4.4 4.4.06</p>

List **only** the industry key issues and strategies (up to 3 years) pertaining to this Strategic Goal

**Skilling WA: Strategic goal 5**

Plan and coordinate a strategic State Government response to workforce development issues in Western Australia.

<b>Issue (from Section 3)</b>	<b>Strategy</b>	<b>Actions</b>	<b>Skilling WA Priority Action</b>
1. There is a need for greater access to cross-Government labour force and training data specific to sport, recreation and racing industries (metropolitan and regional).	Improve the robustness of data available to training councils	FutureNow to work with relevant Government Departments, and support industry research projects to ensure access to industry-specific demographic data	5.3 5.3.03
2. There is a general lack of workforce planning, within sport, recreation and racing organisations.	Promote workforce planning models and best practice examples to the sport, recreation and racing industries	FutureNow to promote the benefits of effective workforce development practices to the sport and recreation industry to encourage industry participation in workforce planning to enhance business productivity and sustainability. Specifically, to build upon the outcomes of the DSR funded project being carried out by JGC Group to assist sport and recreation organisations in developing organisational workforce development plans; and the work by APEX HR Consulting on a suite of HR-related projects.	<b>5.1</b> <b>Carried forward to section 5</b>

List **only** the industry key issues and strategies (up to 3 years) pertaining to this Strategic Goal

## SECTION 5 RECOMMENDED PRIORITY ACTION PLAN

<b>FutureNow Strategy: Source a solution to ensuring the continuation of skilled and qualified farriers for the racing and equine industries in Western Australia</b>			
<b>Recommended Priority Action(s)</b>	<b>Steps to Implement Actions</b>	<b>Priority</b>	<b>Date to be completed</b>
<b>FutureNow to work with stakeholders to source an appropriate RTO for the delivery of the farriery apprenticeship to ensure the continued supply of qualified farriers to the industry.</b>	After the awarding of the contract of delivery of the Farriery Apprenticeship to a South-Australian based RTO (Educational Services and Consultants), FutureNow will liaise with this RTO, together with Racing and Wagering WA and industry farriers to monitor the delivery of the apprenticeships in WA to ensure the continued supply of qualified farriers	High	Dec 2015
Lead Agency: FutureNow			

**FutureNow Strategy: To increase the awareness, and promote the benefits of effective workforce development practices to the sport, recreation and racing industries to encourage industry participation in workforce planning**

Recommended Priority Action(s)	Steps to Implement Actions	Priority	Date to be completed
<p>FutureNow to partner with relevant Government Departments, peak sport and recreation bodies, and advisory groups to promote the importance of workforce planning for the sport and recreation industries</p>	<p>FutureNow to liaise with the Department of Sport and Recreation, WA Sports Federation, other recreation peak bodies and the HR Sport and recreation industry group established through the Department of Sport and Recreation to promote the benefits of effective workforce development practices</p>	High	Dec 2015
	<p>FutureNow to promote best practice case studies within the industry including the DSR funded workforce development planning project currently rolling out by JGC Group to sport and recreation organisations in WA, through mediums such as the People in Focus eNewsletter, the FutureNow eNews, and FutureNow website.</p>	High	Dec 2015
	<p>FutureNow to promote HR good/best practice to sport, recreation and racing industries through:</p> <ul style="list-style-type: none"> <li>• Sport and recreation templates developed by Apex HR Consulting, as one component of the HR project funded by the Department of Sport and Recreation</li> <li>• content and templates located on the Workplace Essentials website</li> </ul>	High	July 2016

Lead Agency: FutureNow

**FutureNow Strategy: Increase VET training delivery in Certificate III and IV level qualifications for the outdoor recreation industry**

Recommended Priority Action(s)	Steps to Implement Actions	Priority	Date to be completed
<p>FutureNow to partner with Outdoors WA and training providers to increase and develop a coordinated approach to outdoor recreation training delivery and career pathway opportunities</p> <p><i>There is a shortage of qualified outdoor recreation instructors in WA, resulting from a lack of training providers delivering Certificate III and IV level outdoor recreation qualifications</i></p>	<p>FutureNow to liaise with Outdoors WA in the support of RTO's for delivery of higher level outdoor recreation qualifications</p> <p>FutureNow to liaise with Outdoors WA, Senior High Schools, RTO's and Universities to develop a coordinated approach to career pathways in outdoor recreation/education</p> <p>FutureNow to work with industry to identify potential funding opportunities</p> <p>FutureNow to promote Certificate III and IV Outdoor Recreation traineeships to potential trainees and employers in an effort to increase the number of instructors qualified at this level to meet industry shortages</p> <p>FutureNow to continue to lobby for the ANZSCO occupation outdoor adventure instructor to be included on SPOL</p>	<p>High</p> <p>High</p> <p>High</p> <p>High</p> <p>High</p>	<p>Dec 2015</p> <p>July 2016</p> <p>Dec 2015</p> <p>July 2016</p> <p>July 2016</p>
<p>Lead Agency: FutureNow</p>			

**FutureNow Strategy: FutureNow to monitor sport and recreation activity undertaken through VETiS programs**

Recommended Priority Action(s)	Steps to Implement Actions	Priority	Date to be completed
<p>FutureNow to monitor VETiS delivery in sport and recreation qualifications in relation to current and planned enrolments and completions</p> <p><i>Large increases in VET in school delivery for sport and recreation qualifications is currently being experienced, with numbers likely to increase substantially with the introduction of new WACE requirements in 2015</i></p>	<p>FutureNow to liaise with VET coordinators to identify current and planned VETiS sport and recreation delivery. Due to the half-year cohort, a true indication of the increase in Sport and Recreation VETiS activity won't be accurately apparent until 2016, however early indications are that there have been increases in enrolments in sport and recreation VETiS qualifications in 2015.</p> <p>On an as-needs basis and in conjunction with industry experts, FutureNow to support teachers in ensuring their vocational competency and currency by assisting in the facilitation of PD workshops where serious deficiencies are apparent, such as those identified in the TAC VETiS Audits.</p> <p>FutureNow to track increases in VET enrolments in sport and recreation qualifications delivered through VETiS, and liaise with industry on possible ramifications and determine</p> <p>FutureNow is a part of a committee convened by TAC with representation from other training councils and school sector bodies to develop a toolkit to assist and guide schools with delivery of VETiS qualifications.</p>	<p>High</p> <p>High</p> <p>High</p> <p>High</p>	<p>Dec 2015</p> <p>Ongoing 2015</p> <p>Dec 2015</p> <p>Dec 2015</p>

Lead Agency: FutureNow

## **SECTION 6 PLAN ADMINISTRATION**

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### **Plan Contact**

This plan is maintained by the Sport and Recreation Project Manager for FutureNow – Creative and Leisure Industries Training Council. Feedback regarding this plan should be made in writing to:

- a Email: [rdavidson@futurenow.org.au](mailto:rdavidson@futurenow.org.au)
- b Mail: PO Box 1811, Osborne Park DC WA 6916
- c Office phone number: (08) 9285 8555

### **Review Requirements and Issue History**

Schedule 2 of the Service Agreement requires that this plan is reviewed and updated annually.

This issue entirely supersedes the previous issue of the plan. Superseded issues should be destroyed, or clearly marked as superseded and removed from general circulation and the Training Council website.

<b>Issue No.</b>	<b>Year Approved</b>	<b>Comments/Summary of Main Changes</b>

### **Distribution List**

This plan is issued electronically on the Training Council website after it is approved.

### **Consultation for this Issue**

The review of this issue of this plan was coordinated by the Chief Executive Officer for the FutureNow – Creative and Leisure Industries Training Council. This issue was updated/re-written as part of the annual review process and the main round of consultation with industry representatives and the FutureNow Board of Management occurred in June 2014.

### **Communications Plan Summary**

Once the plan is approved, its update will be:

- a endorsed by the FutureNow Board of Management
- b noted by the Department of Training and Workforce Development
- c posted on the FutureNow website

### **Validation of this Plan**

Arrangements in this plan will be validated within the annual review cycle by:

- a Annual surveys, annual checking of data and continual liaison with industry to understand issues, trends, current and future workforce development needs.

## SECTION 7 APPENDICES

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The consultation process for training and workforce development planning, projects and activities undertaken by FutureNow – Creative and Leisure Industries Training Council included representatives of the following industry association/organisations through communications, advisory meetings, seminars, conferences and projects throughout 2014/15:

- FutureNow Board of Management
- Department of Sport and Recreation
- Human Resources Industry Advisory Group, consisting of representatives from:
  - Department of Sport and Recreation
  - Fremantle Dockers Football Club
  - WA Sports Federation
  - West Coast Eagles Football Club
  - West Australian Football Commission
  - Western Australian Cricket Association
  - Netball WA
  - Triathlon WA
- Fitness Australia (WA Branch)
- LIWA Aquatics
- PCYC
- Royal Life Saving Society (WA)
- AUSTSWIM
- Sports Education and Development Australia (SEDA)
- Outdoors WA
- AFL SportsReady
- WA Sports Federation
- Apex HRC
- Racing and Wagering WA
- Racing and Wagering WA (Racing Industry Training)
- Sports Medicine Australia (WA)
- YMCA (training)
- Adventure World
- Industry Operator Representatives (sport, recreation and racing sectors)
- Registered Training Organisation Representatives (public and private)
- Schools

## SECTION 8 LIST OF TABLES

This section should be used to provide a list of tables and graphs used within the main body of the document.

Number	Name of Table or Graph
Graph 1	Sport and Recreation Industry Size
Graph 2	Sport and Recreation Industry Demographics
Graph 3	Sport and Recreation Indigenous Employment Status
Graph 4	Dispersion of population and fitness industry workforce by jurisdiction, % of total, 2011
Table 1	Western Australian Persons Employed in a Sport or Physical Recreation Occupation – 2006, 2011 Census
Table 2	Summary of Issues Table
Table 3	Community Recreation and Aquatic Occupations, ABS 2006-2011 Comparison
Table 4	State Priority Occupations List 2015 – Aquatics
Table 5	VESU Institutional-based Course Enrolments for Community Recreation and Aquatics Qualifications
Table 6	TRS Traineeship Commencements for Community Recreation and Aquatics Qualifications
Table 7	TRS Traineeship Completions for Community Recreation and Aquatics Qualifications
Table 8	School Curriculum and Standards Authority VETiS Statistics for Community Recreation and Aquatics Qualifications (2013 and 2014)
Table 9	Fitness Occupations, ABS 2006-2011 Comparison
Table 10	Number of Centres by WA Health Clubs (as of Jan 2014)
Table 11	State Priority Occupations List – Fitness
Table 12	VESU Course Enrolments in Fitness Qualifications
Table 13	TRS Traineeship Commencements in Fitness Qualifications
Table 14	TRS Traineeship Completion in Fitness Qualifications
Table 15	School Curriculum and Standards Authority VETiS Statistics for Fitness Qualifications (2013 and 2014)
Table 16	Outdoor Recreation Occupations, ABS 2006-2011 Comparison
Table 17	2015 State Priority Occupations List (SPOL) – Outdoor Recreation
Table 18	VESU Institutional-based Course Enrolments for Outdoor Recreation Qualifications
Table 19	TRS Traineeship Commencements for Outdoor Recreation Qualifications
Table 20	TRS Traineeship Completion for Outdoor Recreation Qualifications
Table 21	School Curriculum and Standards Authority VETiS Statistics for Outdoor Recreation Qualifications (2013 and 2014)
Table 22	Sport Occupations, ABS 2006-2011 Comparison
Table 23	Sport and Recreation Full and Part Time Employees by Functional Area
Table 24	VESU Institutional-based Course Enrolments in Sport and Recreation Qualifications
Table 25	TRS Traineeship Commencements in Sport and Recreation Qualifications
Table 26	TRS Traineeship Completion in Sport and Recreation Qualifications
Table 27	School Curriculum and Standards Authority VETiS Statistics for Sport and Recreation Qualifications (2013 and 2014)
Table 28	Racing Occupations, ABS 2006-2011 Comparison
Table 29	WA Racing Industry Employment (2012)

<b>Number</b>	<b>Name of Table or Graph</b>
<b>Table 30</b>	Racing Statistics, Number of Registered Persons by Code (2014)
<b>Table 31</b>	State Priority Occupations List – Racing
<b>Table 32</b>	VESU Institutional-based RGR08 Racing Industry Course Enrolments
<b>Table 33</b>	TRS Traineeship Commencements in Racing Qualifications
<b>Table 34</b>	TRS Traineeship Completion in Racing Qualifications
<b>Table 35</b>	TRS Apprenticeship Commencements in Farriery Qualification
<b>Table 36</b>	TRS Apprenticeship Completion of Farriery Qualifications
<b>Table 37</b>	School Curriculum and Standards Authority VETiS Statistics for Racing Qualifications (2013 and 2014)

## SECTION 9 GLOSSARY

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### Acronyms

Acronyms that are used in this plan.

**Table: Acronyms**

Acronym	Full Title
ABS	Australian Bureau of Statistics
AFL	Australian Football League
ANZSCO	Australian and New Zealand Standard Classification of Occupations
AQTF	Australian Quality Training Framework
ASC	Australian Sports Commission
CaLD	Culturally and Linguistically Diverse
DEEWR	Department of Education, Employment and Workplace Relations
DSR	Department of Sport and Recreation
LIWA Aquatics	Leisure Institute of Western Australia Aquatics
NCAS	National Coaching Accreditation Scheme
NOAS	National Officiating Accreditation Scheme
RLSSA	Royal Life Saving Society of Australia
SPOL	State Priority Occupations List
VET	Vocational Education and Training
VETiS	Vocational Education and Training in Schools
WA	Western Australia
WACE	Western Australian Certificate of Education

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