

FutureNow.

Fitness

FutureNow is an independent body that provides industry informed advice to influence skills development strategies across the Creative, Leisure and Technologies sectors. Our work assists Western Australia to be prepared with the new order skills required by the evolving economy and our changing society.

Current Industry Environment for Sport, Fitness and Recreation Sectors

Training package updates and Government funding to support workforce deficit

As the sport, fitness, and recreation sectors recover from COVID-19 shutdowns in Western Australia, employment forecasts for job roles anticipate growth over the next five years¹. There are however still specific subsectors, such as aquatics, where the confidence of employees to return to casual and non-essential roles are creating a workforce deficit². The West Australian Government has responded by investing in funding relevant training, such as the fully-funded swimming instructor course for Year 12 students³ and fee-free training for youth, concession students and job seekers. In addition, the National aquatic and fitness training packages have been updated to align training with the newly released principles from the Department of Health and the Australian Institute of Sport to create safe sport, fitness, and recreation operating environments. The aim to ensure the skills and knowledge of these sector workers are current, up-to-date, and aligned with industry needs.

Industry responses to commercial disruption

The sport, fitness and recreation industry responded to the pandemic by expanding into alternative methods of service delivery, such as fitness instructors offering online personal and group training⁴. This is not possible however for team sports, and many major sports are still being impacted by cancellations or rescheduling. An example of this is the Australian Masters Games which was due to be held in Perth October 2021 and is rescheduled for April 2022. In some cases, sporting events were held with no spectators. This lack of ticket sales has impacted bigger commercial sports who receive a significant amount of money from sales and aligned purchases such as merchandise⁵. The relocation of major sporting events, such as the AFL grand final to Perth, was an adaptive and historical solution demonstrating how this sector is considering alternative ways to deal with COVID-19 impacts and the potential loss of revenue.

Outdoor recreation experiencing growth in participation

Not all sectors within sport, fitness and recreation have experienced a detrimental impact on participation and workforce employment and development. Restrictions in national and international travel found more Western Australians exploring and travelling within their own state. Participation rates, especially in bush walking and mountain biking⁶ have significantly increased. This growth trend was recognised by the State government who have increased funding towards trail development. There are also professional development programs by Trails Future being piloted to upskill and

enhance the professionalism of this growth industry⁷. This has been accompanied by strong strategic development, such as the *WA Hiking Strategy: Bushwalking and trail running in Western Australia 2020-2030 report*.

Mental health benefits through sport, fitness, and recreation

Mental health, as well as physical health, has become a focal point in the sport, fitness, and recreation sector. Nineteen per cent of Australian's reported their mental health as either worse or much worse than before COVID-19⁸. The sport, fitness, and recreation industry has been a critical mechanism for providing exercise and social connection to increase individuals' mental health. Regular exercise reduces stress and improves mental health⁹, which is especially important when one in six Australians are experiencing depression, anxiety, or both¹⁰. Being connected to a fitness or sporting community can also enhance mental health¹¹. During COVID-19 lockdowns the daily exercise allowance produced an increase in walking, running, cycling, bush walking and swimming activities.¹² Recent reports found that hikers indicated mental health as one of their major reasons they exercise outdoors in scenic nature¹³, and adult swimmers indicated mental health as one of the key reasons for their participation¹⁴. Sometimes a problem can occur within these sectors when staff, volunteers or participants are unaware of how to handle mental health issues. SportWest, the peak sporting industry body, has recently released a mental health framework to sporting clubs and associations.

Sports broadcasting predicted for continual revenue increase

Continual revenue growth in the sport sector is drawn from the increasing value of broadcasting rights. This revenue flows to the sporting clubs and contributes to increased employment and facility management costs. It is estimated that whilst some of these rights were re-negotiated to be extended because of the COVID-19 period, it is still a large contributor, and is predicted to have a 5-year growth of \$12.8 billion to \$16.4 billion in revenue in 2025-6 within Australia¹⁵.

Growing trend in yoga and pilates

Unemployment in Western Australia is at its lowest since 2013 at 3.9% and there is a new all-time high employment at 1.427 million¹⁶. If this transfers to increased household expenditure this bodes well for the sport, fitness and recreation sectors as consumers spend more money in these areas at periods of extra discretionary income¹⁷. There is a growing trend in yoga and pilates class attendance, especially among the younger female generation¹⁸. This is boosted by a growing health conscious culture¹⁹. Research has found that yoga has over 2.8 million participants across Australia and 1.2 million participating in pilates²⁰.

Shift towards an aging population and potential impacts on workforce and volunteer needs

The sport and fitness industry is also experiencing a shift towards an aging population. It is projected that the 15% of Australians aged 65 or older will increase to 22% by 2056. Data shows that 48% of older Australians indicated they participated in physical activity five times a week with 43% of these active in sport-related activities²¹. With this shift in population, there will likely be an increased need for a workforce and volunteers to service this group. This could in turn create a shortage of workers trained in creating age related sport and fitness programs.

Fitness sector

COVID transition exercise choices

The fitness sector was impacted significantly due to COVID-19 and led AUSActive to recommend fitness staff transition to online services²². While this strategy helped reduce membership losses there is data to suggest that some people now prefer their transition exercise, such as walking or using a home gym²³. Others have instead taken up more mindful physical activities, such as yoga, or focussed on attending boutique or functional fitness style gyms which offer a more social dimension such as group fitness classes²⁴. Industry consultation feedback has indicated that there is a slight shortage in group fitness instructors such as cycle instructors. AUSActive have recognised this cultural shift and has a re-branded including expanding their concept of fitness to focus beyond the gym to wellbeing activities for every age group²⁵.

Employment growth

Employment in this industry is still expected to grow around 5.9% over the next four years to 2025-26²⁶. Increased health consciousness and obesity rates will continue to motivate people to attend fitness facilities and participate in physical activities. Training in this field is still popular as fitness enthusiasts are keen to find employment in roles which align with their fitness identity and allow them to assist others in achieving their health and fitness goals. While there is still risk of these jobs in this industry being suspended from shutdowns, there has been an industry noticed small shift towards younger student enrolments and graduates²⁷.

Aging populations and its influence on employment opportunities

The mature generation still enjoy traditional aerobics²⁸ and this can be seen by the rate of participants in Prime Movers. This is an exercise class designed specifically for those over 50 and has a membership of over 5000 men and women with over 80 classes held each week in the metropolitan and Mandurah area²⁹. Increased prevention and wellness services in aged care and rehabilitation, and clinical pilates could present numerous employment opportunities for university trained exercise physiologists and aligned instructors³⁰. AusActive also offer continuing education credit point short courses on exercise program design for injury management and program design for the more mature person.

Reducing barriers to exercise through health insurance provider rebates

Growing advocacy from AusActive is encouraging members of BUPA and other health insurance funds to start claiming gym and personal training costs if they are eligible³¹. The ability to claim costs can be an effective method in reducing barriers to participation.

Industry Developments

There are several initiatives presented recently via reports, frameworks and programs within the sport, fitness, and recreation sectors. These include:

The Australian Sports Commission Corporate Plan - 2021-2025 – This plan is targeting two key purposes. To make Australian's stronger through sport, and to build sustainable winning systems for Australian athletes. The potential to inspire Australians over the next decade is a key move and investment, particularly with Brisbane hosting the 2032 Olympic and Paralympic Games and several other key international sporting event such as the FIFA Women's World Cup 2023 to be held in Perth.

SportWest Mental Health and Wellbeing Community Sport Framework - This framework was developed and distributed to community sporting clubs in 2021. The aim to support quality practice in mental health and wellbeing promotion initiatives, to identify ways to promote mental health and wellbeing and to provide guidance on what to consider when engaging a mental health and wellbeing program deliverer or service provider.

2022 Women Leaders in Sport Scholarship (WLIS) – Sport Australia is striving to achieve gender equity in sport. In 2019, women comprised 24% of CEOs across 63 national sporting organisations (NSOs), and 15% of high-performance coaches. Applications for the 2022 WLIS are now closed however applications for 2023 will likely be held around September and October 2022.

The Social, Health and Economic Value of the Australian National Aquatic Industry Report July 2021 – This report highlights the significant contribution of the aquatic industry to the overall wellbeing of Australians. It highlights the social benefits, which at times can be under-valued or difficult to measure. It shows that bringing people together, supporting marginalised groups and supporting early learning can be critical ways to support local communities.

Please get in touch with FutureNow

FutureNow is continually seeking broad input from stakeholders and representatives in the Western Australian aquatics and community recreation sector. If you would be interested in providing your perspective on this snapshot or related workforce matters for your sector, our Creative Industries Industry Manager would love to hear from you:

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