

Sport and recreation

FutureNow is the Western Australian Training Council for the creative, leisure and technology industries. The Council is a skills advisory body that represents the voice of industry, advising the State Government on the training and workforce development needs of our industry sectors.

Current Industry Environment

Close to 12 million Australians participate in sport annually, with a further 3.4 million involved through volunteering, coaching, officiating, administration and other non-playing roles.¹ It is estimated that sport generates 2-3% of Australia's national GDP and 220,000 people are employed nationally across the sport sector.² Participating and volunteering in sport and recreational activities improves the physical and mental health of Australians, promotes social inclusion, reduces isolation and plays a role in building cohesive and connected communities, especially in rural and regional Australia.

There are more than 5,500 sport and recreation clubs and 100 State Sporting Associations in Western Australia. 500,000 Western Australians participate in sport, supported by 200,000 volunteers. Sport delivers approximately 3% of WA's GDP, and returns \$8.6 billion in economic, health and education benefits, returning \$7 for every \$1 spent.³ One hundred and thirty-eight local governments invest heavily in providing public open spaces like parks and ovals, and community infrastructure facilities like leisure centres and club rooms.⁴

The sport and recreation sector experienced severe disruption during the restrictions imposed in March to limit the spread of COVID-19, when limits on public gatherings were imposed and community sport, gyms, pools, and fitness centres closed. The Arts and Recreation Services industry saw the largest percentage fall in employment across Australia in the quarter to May 2020, down 35.4%, with 87,700 fewer employed.⁵ The casual and seasonal nature of much of the work in the sector, meant many workers were ineligible for government support and disengaged from their employers while they looked for work elsewhere.

Demand for workers and volunteers returned as restrictions eased although not to the same levels as pre-pandemic. Australian Bureau of Statistics (ABS) data on 30 June showed a positive trend for Western Australian employment which had the largest percentage increase of all states in jobs between mid-May and mid-June, a rise of 2.3%.⁶ The staged reopening of gyms and fitness clubs and the resumption of community sport (as well as resumption of hospitality services) on 18 May and 6 June has contributed to these positive numbers.

Overall, sport and recreation businesses and organisations are optimistic about the eventual return to normal levels of demand but believe this will take time and require economic recovery as sport and recreation activities are a discretionary spend and the cost of participating is emerging as a barrier as the economic downturn impacts incomes.

The sport and recreation sector divides broadly into four sub-sectors: sport, fitness, outdoor recreation, and aquatics and community recreation. A profile for each is set out below.

Sport

Sport activity is centred around elite sports, based on professional athletes operating at state, national and international levels and funded through sponsorship, betting, and broadcast rights; and community sport operating at a local level with a largely volunteer workforce and mainly funded through club fees.

Businesses in this sub-sector are involved in sports administration, instruction, betting activities, or operating sports clubs or facilities. Overall, sector revenue is forecast to rise from 13.5 billion in 2020 at an annualised 3.5% over the five years through

2024-25 to \$16.0 billion.⁷

Job roles in sport include sports coaches and instructors, sports officials, sports managers, team managers, sport event managers, sport development officers and managers.⁸ In 2019, increases in employment had been projected by the Australian Government Job Outlook between 2019 and 2024: 15% for Sports Coaches, Instructors and Officials (from 59,700 to 69,200) and 9% for Amusement, Fitness and Sports Centre Managers (from 14,200 to 15,600).⁹ The 2019 employment projections do not take account of any impact caused by the COVID-19 pandemic and are therefore no longer reflective of current labour market conditions. As such, they should be used, and interpreted, with some caution.

In March 2020, national and State requirements for social distancing and public gatherings to prevent the spread of COVID-19 resulted in the complete cessation of sports at elite and community level except for horse and dog racing activities.

Most sport at both levels resumed as restrictions eased but not all participants and volunteers returned. An Australian Sports Foundation Survey assessing the impact of the crisis on community sport in May and June estimated 16,000 clubs (around one in four) Australia-wide were at risk of closure due to financial losses and new costs associated with the pandemic.¹⁰

Outdoor Recreation

Outdoor recreation activity takes place in the natural environment and includes nature-based tourism, camps and outdoor education, adventure therapy, and a full range of outdoor recreational activities, such as cycling, fishing, bushwalking, canoeing, surfing, climbing and many others.¹¹ Job roles in the outdoor recreation sub-sector include: outdoor activity assistant, outdoor activity guide, outdoor activity instructor, outdoor recreation assistant, outdoor leader and outdoor recreation program manager.¹² In 2019 nationally, employment increases of 19% had been projected for Outdoor Adventure Guides between 2019 and 2024 (from 6,800 to 8,100).¹³ A recent study found that numbers working in the outdoor recreation are being underestimated.¹⁴

Around \$2.1 billion is spent each year on nature-based outdoor activities in Western Australia. This expenditure makes a \$1.5 billion contribution to the State's economy and supports around 18,500 direct and indirect full-time equivalent jobs. Many nature-based outdoor activities support regional economies by shifting expenditure from urban to regional cities, towns, and rural areas. Nature-based outdoor activities provide avoided healthcare system cost benefits to the Western Australian economy worth at least \$208 million a year, and \$326 million in other recreation benefits for people living in Western Australia.¹⁵

The WA government has been implementing several initiatives to grow the outdoor recreation industry. Mountain bike trails and tourism facilities are being constructed at Dwellingup and Collie and training programs delivered for the requisite staff to build and maintain them.

Outdoor Recreation providers were immediately affected by COVID-19 restrictions after March 26 on social distancing, the size of public gatherings, state and regional border closures preventing tourism, and by school closures shutting down Outdoor Education programs.

School camps were permitted to recommence on 8 June, removing one of the key barriers to a return to normal levels of activity for outdoor recreation providers. State and national borders remain in place and the decline in tourist numbers is likely to continue to affect outdoor recreation businesses.

Fitness

This sub-sector consists of health clubs, fitness and leisure centres, fitness franchises, indoor and outdoor personal training and smaller fitness studios including yoga and Pilates. Job roles include aqua instructor, gym instructor, group exercise instructor, personal trainer, personal training manager and fitness services coordinator.¹⁶ In 2019, increases in employment of 16% for Fitness Instructors (from 37,800 to 43,900) had been projected by the Australian Government Job Outlook between 2019 and 2024.¹⁷

Fitness contributes to improved physical and mental health in the community, reduced stress, greater economic participation, and increased productivity in the workforce. Australia's fitness centres contribute a total of \$3 billion to Australia's economy. There is a collective membership across Australia of up to 3.7 million people. Personal trainers form an integral part of the

industry with the sector experiencing annual growth of 4.9% over the past five years.¹⁸

In Western Australia, health clubs, fitness centres, yoga, barre and spin facilities, saunas and wellness centres were closed from 26 March until 6 June. Boot camps were allowed with no more than two people exercising social distancing until April 27 (10 people) and 18 May (20 people) and full reopening on 27 June in line with social distancing requirements.

Fitness Australia conducted a survey between 1 April 2020 and 13 April 2020 to demonstrate the impact the pandemic has had on the sector. Nationally, 80% of sole traders and 100% of boutique and multi-service facility gyms reported drops in revenue. The re-emerging fitness industry may look different for some time with virtual sessions to stay as clients remain concerned about infection. Private training is in demand and large group training has reduced.¹⁹

Aquatics and Community Recreation

Aquatic facilities are an essential part of community life and are important cultural institutions that provide many social, economic and health benefits to Australians of all ages. Aquatic and community recreation involve community-oriented activities such as sport, aquatics, personal development programs, rehabilitation programs and government initiatives. They promote aquatic skills development, recreation, sport, and healthy lifestyles and play a role in social cohesion, especially in rural and remote communities. Job roles in this sub-sector include sports centre manager, pool lifeguard and swim coach or instructor.

In 2018-19, aquatics centres in Western Australia were patronised 11.5 million times (1.1% increase from 2017-18), with an average of 4.2 visits per person. 4,152 workers are employed, including 578 technical pool operators, 1,177 pool lifeguards and 2,397 swimming instructors. 53% of the workforce is casual and 37% permanent. There were 128 public facilities throughout WA with the majority, 95 in regional or remote areas and 33 located within the Perth metropolitan area. The aquatic workforce is largely local with 71% living within 15 kilometres of their workplace. Total expenditure on aquatics facilities was \$84.5 million, delivering benefits to the community of approximately \$303 million. Operation of these facilities requires substantial resources and specialised aquatic staff creating additional employment opportunities for communities.²⁰

From 26 March 2020, swimming pools in Western Australia were closed. Beaches remained open in WA provided social distancing was maintained. Swimming Instructors and Pool Lifeguards were heavily impacted. Across Australia the pandemic led to a loss of employment, or a significant reduction in hours, for many of the 67,000 frontline workers, of which almost half were casual employees, three-quarters female and 40% between the ages of 18 to 24 years.²¹

By 3 June 2020, most pools normally be open at this time of the year had reopened and normal operations resumed on 27 June in line with social distancing rules.

Two nationally recognised short courses, the Pool Lifeguard Skill Set and the Swimming and Water Safety Teacher Skill Set have been developed to fast-track participants into entry level pool lifeguarding and swimming instructor roles in time for the West Australian aquatic sector's busy summer period.

Industry Developments

As Western Australia eases out of the restrictions imposed in March sport and recreation are emerging as drivers for recovery. This period gives the industry a unique chance to rethink the way it recruits and trains. Despite the immediate impact of the crisis on young workers, this industry continues to provide pathways that build leadership skills and resilience. Industry feedback suggests that there is increasing demand for workers at Certificate IV level, employees who can work at multiple levels across a range of tasks, who have specialist technical skills but also the capacity to attend to the day-to-day operation of an organisation.

There is a positive culture and cohesiveness in sport and recreation organisations that served the industry well during the period of restrictions. A successful workforce is not just about the having the right skills and knowledge, but also about attitudes. The COVID-19 crisis led to organisations at local, state, and national levels working together to find solutions to survive, adapt and recover.

There is a strong overlap between the sport and recreation sector, and government policy and planning on public health and the tourism industry. Training and employment in the sector have generally been increasing as federal and State governments

implement programs aimed at improving the health and well-being of the population. As businesses re-open, these programs can resume within the State. The return of tourism activity, for example to support outdoor recreation, was more problematic while borders remain closed.

There are several federal and State initiatives to address health goals through sport and recreation:

The Australian Sports Commission Corporate Plan - 2019-2023 – This plan has targeted an increase of 207,000 Australian adults meeting physical activity guidelines in 2019-20, and a further 211,000 in 2020, to meet Australia's commitment to the World Health Organisation target to reduce inactivity by 15% by 2030. To get more Australians moving more often, in 2019-20 Sport Australia is focusing on two key areas; infrastructure and inclusion, ensuring infrastructure investment is coordinated to achieve the best outcome for communities and setting an example for sport around diversity, inclusion and social issues such as gender equality.²²

SportWest - Strategic Priorities for WA Sport - This strategy was released in July to identify the priorities facing the WA sport industry and help inform the best way to respond to these challenges and the support required for the industry. It is based on two key messages: that sport is fundamentally about people, their wellbeing, and the communities in which they live; and that investment in sport connects and improves the lives of Western Australians and their communities. A series of priorities have been developed across three themes:

Capability - Developing the people and the organisations who support the industry.

Access - Improving access to sport participation opportunities for the community.

Innovation - Growing a sport sector that embraces knowledge, collaboration, data, and technology.²³

Department of Local Government, Sport and Cultural Industries: WA Hiking Strategy: Bushwalking and trail running in Western Australia 2020 – 2030 - This strategy was released in June to provide a strategic direction for hiking in Western Australia. It identifies the potential social, cultural, economic, environmental, health and wellbeing outcomes for the State. It seeks to maximise the opportunity for all Western Australians and visitors to benefit from access to an appropriate range of hiking experiences and will guide the sustainable development of hiking activities and associated trails infrastructure.²⁴

Great Southern Centre for Outdoor Recreation Excellence (GS-CORE): Great Southern Regional Trail Master Plan (RTMP) - GSCORE announced the launch of a strategic, ten-year plan to develop a network of sustainable trails encouraging family-friendly, outdoor experiences across the Great Southern region. It provides a coherent and clearly outlined program of trail infrastructure development across the Great Southern region over a ten-year period (2020-2029). It has been developed to guide decisions about the management of, and investment in, trails and provides a vision of what the trail network across the Great Southern will look like in the future.²⁵

Technology in sport and recreation

Technology in sport and recreation has become pervasive with developments like smart outfits that track physiological data from the body, camera systems and drones to make umpires', referees', and other officials' decisions more accurate, fitness trackers and computerised workout equipment to enhance the workout experience and mobile phone apps to enable booking, check-in, and payment processes. During lockdown, technology provided a lifeline to organisations in this industry, allowing the delivery of virtual fitness classes, the conduct of business meetings and the capacity to connect with like organisations. Technology facilitated communication between state and national peak bodies and government to plan and develop strategies. At a personal level, it provided the tools for individuals to maintain human connections while in isolation. This sector quickly picked up the skills needed for digital transformation, combining virtual meeting products with effective communication skills. With the easing of social restrictions in Western Australia, staff have returned to the office/workplace and they are welcoming the opportunity to run face-to-face programs once again.

Workforce Opportunities

Responding to COVID-19

As the COVID-10 crisis unfolded in Australia, the sport and recreation industry were quick to understand the skills needed to respond to a rapidly changing business environment. Business managers and leaders understood that they could manage risk and change through effective governance and, ultimately, achieve business continuity. The sector was able to develop and implement infection control protocols to restore public confidence, encourage the return of participants and volunteers and resume sport and recreation activity.

Prior to the coronavirus pandemic, industry indicated there were skills shortages in Outdoor Recreation (outdoor adventure instructors) and in Aquatics (swimming instructors, pool lifeguards and sports centre managers). Two nationally recognised short courses, the Pool Lifeguard Skill Set and the Swimming and Water Safety Teacher Skill Set were developed to fast-track participants into entry level pool lifeguarding and swimming instructor roles in time for the West Australian aquatic sector's busy summer period.

The outdoor recreation sub-sector in WA has a shortage of suitably qualified and experienced outdoor adventure instructors as there are currently no providers in Western Australia delivering the Certificate IV in Outdoor Recreation. Outdoor recreation businesses recruit from other states and the closure of Western Australia's borders may reduce access to an adequate supply of workers.

During 2018-2019 the aquatics sub-sector reported shortages of sports centre managers, pool lifeguards and swim coaches. There were only 462 LIWA accredited pool operators (sports centre managers) with 578 positions available in Western Australia.²⁶ The Great Southern, Pilbara and Kimberley regions experienced the greatest shortage. Royal Life Saving WA (RLSWA) provided 3,711.75 hours of pool manager short-term cover from 1 July 2019 to 31 January 2020 primarily in the Pilbara and Kimberley regions. The East Kimberley is particularly vulnerable with multiple aquatic facilities requiring ongoing support to cover pool manager positions.

Based on data provided by Austswim there was a high staff turnover of swimming instructors, with RLSWA reporting occasions when swimming and water safety programs were cancelled or reduced during 2019-20 in the Pilbara, Kimberley, Goldfields, Great Southern and South West regions due to a lack of qualified instructors in these areas. Government-imposed restrictions meant that Austswim courses (including for swimming teachers), conferences, workshops, awards, and other events ceased from 26 March.²⁷

Skills and training strategies

All sub-sectors in sport and recreation have readily adopted infection control and hygiene training for workers and volunteers as part of their plans to re-open businesses and community organisations.

There is currently a good supply of workers for the Sport and Fitness sub-sectors through nationally accredited qualifications. The pandemic may cause a decrease in jobs and result in an oversupply in these two areas.

Supply issues are likely to continue to occur in the Aquatics and Community Recreation sector because of the high turnover of pool lifeguards and swimming instructors as they move from casual and seasonal work to longer term employment and, where facilities are in regional and remote areas, reduced access to training and a small labour market. The COVID-19 crisis has put additional pressure on supply as most training for three key occupations (pool operators, pool lifeguards, and swimming instructors) had to cease or move online for about two months. First Aid and resuscitation certificates have expired in the interim. Additional courses, reduced fees, and extensions on certificates are being used to clear a backlog and to get workers appropriately qualified to return to work.

The outdoor recreation sub-sector was experiencing increasing demand for workers qualified at Certificate IV level prior to the pandemic and it is expected this demand will return as businesses reopen. There are currently no Western Australia based training organisations offering Outdoor Recreation training at this level. Training providers in WA have been exiting outdoor recreation training because of the expense of delivery.

The Department of Local Government, Sport and Cultural Industries have advised that COVID-19 contact registers becoming mandatory for many WA local businesses and venues from 5 December, indoor sports venues and gyms should already be aware of the State Government's Safe WA app.

While not all venues and activities will be affected by these new contact register requirements, all sport and active recreation organisations that hire or lease venues will need to contact their local government or property owner to understand their expectations.

Businesses and venues should also ensure they have an alternative format for patrons to provide their contact details. This could include a paper-based register and/or an electronic sign-in form.

The State Government has developed templates for paper-based contact registers. For these, and other State Government information and advice on COVID-19 for the WA community and businesses, head to wa.gov.au ²⁸

FutureNow

FutureNow continually seeks feed back from the Sport and Recreation sector to facilitate workforce development and the development of responsive training and skills sets delivery to meet emerging sector needs. If you can contribute to this in any way or require any further information, please contact

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