

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.

Outdoor Recreation sector

Vibrant WA leads to increased participation and employment opportunities

Western Australia has a huge range of incredible landscapes from its pristine beaches to the stunning tree lined hiking trails. Recreational walking continues to be one of the most popular forms of physical activity, and participation in trail running and mountain biking has increased significantly²². Outdoor recreation offers a range of employment from running camps for school children at Woodman's Point to being an outdoor adventure guide in regional Western Australia. It is predicted that job growth in outdoor recreation will be significant over the next four years with a predicted increase of 16%²³. There has also been a push to include inclusive access to trails and outdoor activities.

Education and program development

Over the last 24 months there has been an increased take up of outdoor activities including cycling. Community feedback comments indicate trying to buy a bicycle was difficult and even four-wheel drive cars as people ventured and travelled more outdoors and locally. Recognition of the meaningful benefits of outdoor recreation has led the government to direct increased funding in this area²⁴. Parks and Leisure Australia are creating event management and risk workshops, as well as leisure centre benchmarking projects to support this sector. Their Generate Network Australia program is a capacity building initiative which has been developed to support new professionals and emerging leaders within outdoor recreation to encourage and support employment growth²⁵.

The outdoor recreation sector has training options in vocational education. Outdoor recreation peak bodies also offer short courses to boost skills such as in rock climbing and high ropes.

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.

Trails Futures – Offers newly established professional development programs for those in the recreation trails sector. The goal to build and support a professional trails industry which is important given the increase in trails participation and demand for outdoor recreation workers.

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 Future of Sport Volunteering Insights Report 2021 – The estimated value of sports volunteers in terms of the labour they provide is \$4 billion per year. Volunteer involvement in sport was significantly impacted during the COVID-19 period. Whilst some are slowly returning to support the industry again there is concern that not enough will return. As a result, this report shares a vision of thinking and ideas to support the volunteer experience and enticement to these roles.

Please get in touch with FutureNow

FutureNow is continually seeking broad input from stakeholders and representatives in the Western Australian outdoor 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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