

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.

Sport sector

Predicted employment growth

It is predicted that employment growth in the sporting industry, including roles such as sports coaches, instructors, officials, sports administrators, sports centre coordinators and athletes will experience growth in employment opportunities over the next four years by a range of 8.9% to 14% to 2025²². This field is strongly supported by vocational and higher education study options.

Lockdown disruptions

There is still disruption stemming from long-term lockdowns on other states and territories which significantly impacted their financial state, participation, and volunteer rates²³. This did, and still does, have a flow on impact to sports based in Western Australia which compete at a national level. Local Western Australian sports however, whilst experiencing a decline in membership, found that Western Australia's short lockdowns meant clubs, such as Netball WA, were able to retain around 85% of their membership²⁴. The pandemic will continue to be an ongoing focus for the sport sector. This includes current discussions centring around Western Australia State Government mandatory vaccination requirements.

An evolving sector

National sports training packages have recently been updated to encompass COVID-19 operational changes and policy and framework content, as well as skills in communication, online and social media, marketing, initiative, and enterprise²⁵. These skills are becoming increasingly valuable in a dynamically changing and financially vulnerable work and sport arena. Organisations such as Australian Sports Foundation are providing advice on fundraising projects to assist sporting clubs in their recovery phase²⁶. The good news is sport is ingrained in our Australian culture. It is an excellent way to socialise and participate in a fun and often outdoors way. Over half Australian adults are considered either 'sport lovers' or 'sports participants' and a further 32% are either casual participants or sport spectators²⁷.

Lack of coaches and volunteers for community sport

An area of concern is that talented coaches are moving towards working for private schools to gain secure and well-paid coaching roles since COVID-19 and this has resulted in a gap in community sport coaches²⁸. There has been a decrease in volunteers which places pressure on remaining staff, especially with governance demands and a lack of corporate knowledge in this area²⁹. Governance education in sport is currently being rolled out to national sporting organisations to migrate this risk³⁰.

Changing participation patterns

Data management in sport to measure and analyse participation is seen as an important investment, particularly with changing participation numbers. Since COVID-19 there has been a move from organised to social sport. More people are wanting the flexibility to choose when to participate in sport and in a social setting. This has been attributed to the reason why social golf and tennis have increased in participation numbers. People are also not wanting to travel more than 30 minutes to participate in sport. Organised sport sometimes requires travel to different suburbs throughout the Perth metropolitan region and this can create a barrier to participation³¹.

Women and sport

A recent trend has been an increase in women taking up more activities such as walking and jogging since COVID-19. At an elite level there has been a significant increase in females participating in Australia Football since the introduction of the Australian Football League – Women’s League (AFLW)³². Women in sport and leadership has also been flagged as an important developmental area.

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 sport 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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