Sector Skills Assessment
Active Leisure, Learning
and Well-being

Wales Summary

SkillsActive

February 2010
## CONTENTS

**EXECUTIVE SUMMARY**  
ii  
1. **THE SKILLSACTIVE INDUSTRY AND WORKFORCE**................................. i  
2. **KEY DRIVERS OF BUSINESS COMPETITIVENESS**............................... 5  
   2.1 Key Drivers of Business Competitiveness ....................................... 5  
   2.2 Secondary Drivers of Business Competitiveness ............................... 8  
3. **CURRENT PERFORMANCE – WHAT IS DRIVING CHANGE?** .................. 11  
   3.1 Performance and Competitive Position of the Sector .......................... 11  
   3.2 The Current Economic Climate ....................................................... 12  
   3.2.1 Rising Costs ............................................................................... 14  
   3.2.2 The Impact on Skills .................................................................. 14  
4. **CURRENT SKILLS NEEDS**.................................................................. 16  
   4.1 Where existing supply does not meet employer needs ..................... 16  
   4.2 Recruitment Difficulties ................................................................. 17  
   4.3 Skills Shortages ............................................................................. 18  
   4.4 Skills Gaps .................................................................................... 18  
   4.5 Specific Skills Needs ...................................................................... 18  
5. **ANTICIPATING WHAT LIES AHEAD**.................................................. 20  
   5.1 Golden Decade of Sport ................................................................. 20  
   5.2 Future Skills Requirements ............................................................. 21  
6. **SECTOR SOLUTIONS**......................................................................... 23  
   6.1 Improve Recruitment and Retention ................................................. 24  
   6.2 Professionalise and Upskill the Existing Workforce ............................ 24  
   6.3 Match Supply to Demand ............................................................... 25  
   6.4 Re-direct Funding for Training ......................................................... 26  
   6.5 Increase Sector Investment in our People ........................................ 26  
7. **ANNEXES**......................................................................................... 27  
   SkillsActive footprint using SIC (2003) and SOC codes ......................... 27  
   SkillsActive footprint using SIC 2007 .................................................. 28  
   **BIBLIOGRAPHY** .................................................................................. 29
EXECUTIVE SUMMARY

SkillsActive is the Sector Skills Council for Active Leisure, Learning and Well-being, comprising Sport and Recreation, Health and Fitness, Playwork, The Outdoors and Caravans. The sector makes a significant contribution to the Welsh economy through successful leisure, to the health of the nation and to social equality through community sport and play initiatives.

This paper describes the current and future skills priorities for the sector. It draws on a range of government sources and recent research undertaken by SkillsActive and its sector partners. It explains actions being taken by SkillsActive to address these priorities and identifies areas in which further support from government and/or industry would be beneficial.

- The sector has an estimated gross value added (GVA) output of £400 million and employs around 29,500 people;
- The sector is characterised by part-time, “sessional” employment, with a larger proportion of people employed part-time (49%) rather than full-time (42%);
- The sector benefits from as many as 105,900 volunteers;
- The sector has around 54,200 active coaches;
- Primary sector drivers of current and future skill needs include:
  - Consumer trends
  - Government policy in the devolved administrations
  - Legislative and regulative requirements
  - UK ‘golden decade of sport’
- Secondary sector drivers of skill needs include:
  - Globalisation and technology
  - Demographic issues
- Current performance is determined by:
  - The influence of policies of national and local government
  - Employment trends and skills levels
  - Participation in sport and physical activity
  - Investment / income
- The main generic skills priorities for the sector are:
  - Team working
  - Customer handling
  - Communication
  - Welsh language
- Sector specific technical skills for paid workers and volunteers:
  - Sporting officials
  - Coaches, teachers, instructors and activity leaders
  - Playworkers
  - Grounds(wo)men
  - Caravan workshop technicians, fitters and “siting” staff.
- SkillsActive is addressing skills priorities, occupational standards and qualifications through a range of solutions such as devolved committee structure to ensure employer representation, and licences to practice like the Register of Exercise Professionals;
- There is demand from employers for greater public funding investment in the qualifications they recognise and value, like Apprenticeships, NGB qualifications, UKCC etc;
- Employers also call for greater flexibility in eligibility rules for qualifications and candidates to allow funded training for all ages, for paid and voluntary staff and for the regulatory or statutory training that is required for safe delivery of their valuable services.

1 See Annex 3 for a list of sources
I. THE SKILLSACTIVE INDUSTRY AND WORKFORCE

Sector Definition
The SkillsActive industry covers five sub-sectors: Sport and Recreation, Health and Fitness, Playwork, The Outdoors and Caravans. The sector is not well-defined using Standard Industrial Classifications (SIC 2003); some sub-sectors like the outdoors are better defined using Standard Occupational Classifications (SOC), and sub-sectors form only part of a four-digit SIC code, or sit across several SIC codes. See Annex I for the full definition used. This will be improved under SIC 2007 by the introduction of new codes for sport and recreation education, and for sports clubs and fitness facilities.

Contribution of the Sector
The sector as a whole had an estimated gross value added (GVA) output of £400 million in 2004. The largest sub-sector within this was sport and recreation, producing 50% of total SkillsActive output. The second largest was caravans with 24%. The outdoors and health and fitness sub-sectors were the smallest, both creating approximately £20 million of output.

The active leisure, learning and well-being sector accounted for around 1.1% of total output in Wales in 2004, which suggests that the sector has slightly more importance to the Wales economy than it has across the UK as a whole (0.9%). Output recorded for the sector in Wales accounted for five per cent of total UK active leisure, learning and well-being output.

The universal aim of promoting physical activity contributes to improving the health of the nation and tackling the increasing incidence of obesity. Sport is a great leveller, and is key to central and local government policy for improving social and community cohesion, deterring antisocial behaviour and rehabilitating ex-offenders. Active leisure, learning and well-being activities improve the quality of people’s lives through fun, adventure and personal development and deliver a sense of national pride through international sporting events.

Structure of the Sector
The structure of the sector is largely determined by the nature of provision; whether sector operators are publicly funded, private or not-for-profit, charitable / voluntary organisations. Sport includes a variety of types of organisations, with a range of funding channels or support, ranging from commercial sports with large facilities to smaller sport clubs running on a charitable basis. Most clubs will be affiliated to a national governing body of sport, which provides governance, performance development programmes for talented athletes and training, accreditation and in some cases insurance for coaches and officials. There is some overlap with delivery of health and fitness through publicly-funded leisure centres, which account for roughly half of the sector. Some sports, particularly swimming, rely on the use of public facilities run by local authorities or public private partnerships/trusts, and schools. Depending on the facilities available these leisure centres may also “host” competitive teams for football, ice hockey etc. The other half of the fitness industry is privately owned and commercially run, accounting for c. 60% of total gym memberships.

The outdoors sector is diverse encompassing the ‘traditional’ areas of outdoor education, outdoor recreation and development training, and the more recently defined sub-sectors; explorations and expeditions and outdoor sport development. Organisations include a mix of not-for-profit/voluntary organisations, private operators like PGL, or local authority/LEA funded operations. Playwork also spans publicly funded provision, voluntary clubs and private after

2 There is some overlap between Sport and Recreation and the Outdoors, where sports are common to both sectors, or which overlap with Health and Fitness. This may slightly overstate the dominance of Sport and Recreation in Active leisure, learning and well-being.
school clubs and holiday play schemes. Both private and voluntary providers often rely on public funding subsidies and tax credits to make parental contributions affordable.

The caravan industry encompasses caravan manufacturing and services, caravan sales, and caravan parks. The caravan industry is almost entirely commercial, with virtually no public or voluntary provision, except in Scotland. With the exception of the two caravan clubs and the major group operators, supply in the caravan industry is diverse with a predominance of small owner-operated parks.

**Market and Company Structure**

The public and private health club industry has an estimated market value of £129million in Wales; around 54% of this is accounted for by the private sector, with the remaining 46% accounted for by the public sector. Although the sector has a range of well established national chains and brands (e.g. Outward Bound and PGL), the majority are still small operations. Seventy-six per cent of SkillsActive’s workplaces have a maximum of 10 employees, 20% have between 11 and 49 employees, while just four per cent have over 50 employees.

**Workforce Profile**

A total of 29,500 people were employed in the SkillsActive sector in Wales in 2008. The largest employer, as in the case of output, was the sport and recreation sub-sector, employing 53% of the total sector workforce. Unlike for output, playwork was the second largest, employing 24% of the workforce. The outdoors was the smallest sector (1,400 workers), followed by the health and fitness sector (2,100 workers).

In general, the SkillsActive sector has a higher ratio of females to males in its workforce, compared with the Welsh economy as a whole (58% female and 42% male). Analysis by sub-sector is only available at UK level, with national statistics suggesting that there is a particularly higher than average proportion of women employed in playwork (87%) and a higher than average proportion of men working in the caravan industry (66%).

The SkillsActive workforce has a notably high proportion aged 16-24, with 25% of its workforce in this age range, compared with just 15% across the Welsh economy as a whole. Analysis at sub-sector level is not possible due to small sample sizes, however indications from the UK suggest that both the sport and recreation and health and fitness sub-sectors have higher than average proportions of younger workers. However, it needs to be noted that these will be primarily aged over 18 as many occupations in the sector need licences to operate (e.g. to supervise children) while under-18s have to be supervised, which results in double staffing. The playwork profile is generally older because of parent workers or volunteers. Holiday playschemes typically attract students, pushing the share of 16-24 year olds to 53%. Five per cent of sector workers come from an ethnic background.

**Employment Characteristics**

The sector is characterised by part-time, “sessional” employment, with a larger proportion of people employed part-time (49%) rather than full-time (42%). This is reflected across sport and recreation, health and fitness and playwork.

Self-employment and freelancers working as sole traders or in partnerships, is higher than the Wales economy average in the, caravans and health and fitness sub-sectors. Seasonal employment is important for the caravan industry and holiday playschemes, which attract

---

3 FIA State of the UK Fitness Industry Audit, FIA, 31 March 2009
4 SkillsActive derived from ABI (GB 2008, N Ire 2005)
5 Due to overlap of sectors, the sum of percentage employment for each sector is greater than 100 per cent.
6 SkillsActive derived from Annual Average LFS 2008
7 SkillsActive derived from ABI GB 2007, N Ire 2005, Average annual LFS 2008 (self-employed)
students and other temporary workers. Along with “sessional” work, this clearly presents challenges for employers in terms of recruitment and investment in training.

**Figure 1.1: Employment Status - Wales**

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Self-employed</th>
<th>Part time</th>
<th>Full time</th>
</tr>
</thead>
<tbody>
<tr>
<td>SKILLSACTIVE</td>
<td>5%</td>
<td>42%</td>
<td>49%</td>
</tr>
<tr>
<td>Whole Economy</td>
<td>13%</td>
<td>49%</td>
<td>40%</td>
</tr>
<tr>
<td>Sport and Recreation</td>
<td>9%</td>
<td>40%</td>
<td>54%</td>
</tr>
<tr>
<td>Health and Fitness</td>
<td>9%</td>
<td>33%</td>
<td>48%</td>
</tr>
<tr>
<td>Playwork</td>
<td>2%</td>
<td>46%</td>
<td>50%</td>
</tr>
<tr>
<td>Outdoors</td>
<td>3%</td>
<td>43%</td>
<td>43%</td>
</tr>
<tr>
<td>Caravans</td>
<td>7%</td>
<td>27%</td>
<td>44%</td>
</tr>
</tbody>
</table>


Overall, 22% of those employed in the sector are not qualified to level 2, this is slightly lower than the proportion recorded across the Welsh economy as a whole (25%).

In common with hospitality, employment in outdoor operations providing accommodation and the caravan parks sector includes low skilled, low paid jobs, like waitresses, bar staff, housekeepers, cleaners and caretakers. This in part accounts for a high proportion of staff without an NVQ level 2 or equivalent qualification found in these sub-sectors nationally (28% and 37% respectively). Playwork has a demonstrably higher educational attainment than average with almost half qualified at level 4/5 or equivalent because the common entry route is from teaching. But many workers lack the playwork specific level 2 and level 3 qualifications required for the job, because funding is restricted for those who already hold a higher qualification.

The most over-represented occupations compared with the UK economy as a whole are sports and fitness occupations, teaching professionals, childcare and related personal service occupations and those working in leisure and travel services.

**Coaching**

Findings from Sports Coaching in the UK 2 suggest that around 51% of adults in Wales had participated in some form of sporting activity in the 12 months prior to the survey. Of these around 23% (288,000) adults had received coaching for their sporting activity. Wales recorded the highest proportion of people in receipt of coaching compared with other Home Countries.

---

7 SkillsActive derived from Annual Average LFS 2008
8 Sports Coaching in the UK 2, sports coach UK 2006
Sports coach UK’s Coaching Framework research⁹ suggests that there were approximately 54,200 coaches in Wales in 2008/09. The Home Country accounts for around five per cent of coaches in the UK. The report also outlines projections for the future and indicates that the coaching workforce in Wales is expected to grow by around eight per cent to around 58,770 coaches in 2016/17.

Evidence from across the UK suggests that majority of coaches continue to work on a voluntary basis (70%). Overall, just seven per cent of UK coaches are estimated to work in a full-time paid capacity.

Evidence from Sports Coaching in the UK 2 also suggests that around half of practicing coaches held an up-to-date coaching qualification in the sport that they coached.

**Volunteers**

Applying findings from the Living in Wales Survey 2008 to mid year population estimates, it can be suggested that as many as 105,900 people currently volunteer some time to sports clubs in Wales.

The Living in Wales Survey 2008 reveals that around 42% of the adult population regularly join in with the activities of clubs and voluntary organisations. Sports clubs were the most commonly identified organisations that adults delivered volunteering in. Thirty three per cent of those involved with clubs and voluntary organisations were directly involved with sports clubs.

Of these, the largest group is men aged 45 to 64 (22%). However indications suggests that as a proportion of the population, men aged 16-29 and 30-44 are most likely to be involved in volunteering in sports clubs. As are those from house holds where at least one person works;

Research undertaken by SkillsActive in England indicates there is a 20% shortfall in the number of volunteers needed by the sector¹⁰ in key roles like governance, coaching, officiating and marshalling. Sports clubs¹¹ rely on volunteers in every role, where they significantly outweigh paid staff.

---

¹⁰ Sport, Fitness and Outdoors Employment and Skills Survey, SkillsActive, 2005
¹¹ Survey of Sports Clubs, CCPR, 2009
2. KEY DRIVERS OF BUSINESS COMPETITIVENESS

2.1 Key Drivers of Business Competitiveness

SkillsActive’s sectors are subject to different forces and drivers which impact in different ways. The primary drivers of business competitiveness are consumer trends, government policy, legislation and funding. There are also some secondary drivers of globalisation and technology which also impact on the sector.

Consumer Trends

- **Changing levels of participation** - Fundamentally, the strength of the sector lies in the willingness of people to engage with activities, the ability to maintain their interest and supporting people to become more physically active. The Welsh Health Survey 2008 suggests that around 30% of working aged adults are currently undertaking the recommended amount of moderate intensity exercise per week. Significantly, however, rates of participation decrease with age. Improving the lifestyles of those living in Wales has been highlighted as a priority in a number of Welsh Policy documents, such as One Wales12, which outlined the need to encourage greater participation amongst people of all ages and social backgrounds.

- **Current indications of drop off in rates of participation** - The Adult Participation in Sport Survey13 suggests that a key area of concern is the rate of drop-off from physical activity which takes place after the age of 15. Other concerns relate directly to the fitness industry where levels of membership are important to business viability.

- **Levels of disposable income** - Rates of disposable income present a challenge all sub-sectors. Falling levels of income and/or increases in unemployment may result in a decline in demand or a shift in the type of activity demanded (e.g. increased demand for free recreation, whilst fee paying organisations may report declines).

- **Varying needs of different demographic groups** - Rates of participation are different across different age cohorts, genders and occupational groups/socio economic groups. Furthermore, the type of activity that people with these characteristics is likely to vary (e.g. lower impact activities for older people). Rural/urban issues may also affect levels of accessibility and participation.

- **Competition** - Demand for different activities can also be influenced by competition and market forces. Within the health and fitness and outdoors sub-sectors there is internal competition, where clubs/centres are trying to maintain and attract people who already have membership/use facilities and are active – rather than trying to encourage new market entrants. Furthermore, increased competition from foreign travel (e.g. lower cost flights) and DIY adventure holidays, may affect demand for the outdoors and caravan industry, through directly competing for the tourist market.

- **Media coverage/hosting events** - The hosting of major sporting events, the promotion of sporting success in the media, and the continuation of strong sporting performance at an elite level impact on consumer demand for sport and recreation and outdoors activities. The Ryder Cup will bring a focus to Golf (especially in Wales) in 2010 and the 2012 London Olympic Games will bring international attention to sports in Great Britain.

- **Impacts of the weather** – The outdoors sub-sector and the caravan industry can be affected by seasonal variations and adverse weather conditions14.

---

12 One Wales: A progressive agenda for the government of Wales, June 2007 – A four year programme for government, which sets out an agenda to improve the quality of life of people in Welsh communities.
13 Adult Participation in Sport, 2009 Update (based on 2005 data)
14 The Outdoor Census, SkillsActive, 2009
- **Strength of the economy** – The sector is linked to the overall performance of the sector which will ultimately impact on levels of disposable income, availability of leisure time and willingness to purchase goods and services offered by the sector.

- **Recognition of the sector** – People's awareness of the services offered by the sector is an important driver of consumer demand. One example is within the playwork sub-sector, where there is a growing recognition of the value of free play in children’s development with parents wanting their children to enjoy more experiences from a younger age. Parents are becoming more knowledgeable and consequently more demanding about the quality of playwork services and workers.

**Government Drivers**

*Climbing Higher and Climbing Higher – Next Steps*, are the Welsh Assembly Government’s long-term strategic documents for **sport and physical activity**. They set out the strategic direction for Wales to increase the number of people leading, organising and coaching activity as well as increasing activity amongst the inactive population. As part of the targets to increase the level and time spent undertaking physical activity, the government and relevant partners have introduced a number of initiatives, including *The Free Swimming Initiative, Dragon Sport and 5x60 – Get with it.*

*Creating an Active Wales*[^5], the Welsh Assembly Government’s 5 year action plan for physical activity, builds on the sports strategy and other key policies such as *Food and Fitness – Promoting Healthy Eating and Physical Activity for Children and Young People in Wales Implementation Plan*, the *Play Policy Implementation Plan* and the *Walking and Cycling Action Plan*. The plan identifies a range of planned priorities to increase the proportion of adults[^16] and children[^17] who meet the physical activity recommendations by five per cent over five years. The plan outlines the following priorities:

- Ensuring that adults have access to affordable activities that can be easily incorporated into their everyday living e.g. walking and cycling;
- Recognising the importance of the workplace, since many adults spend a substantial amount of time there;
- Providing opportunities for those experiencing substantial barriers to participation e.g. women, older people, those experiencing social and economic disadvantage;
- Developing and supporting interventions that support physical activity in children, such as ensuring access to active play opportunities, supporting family focussed activity, providing fun and social opportunities, providing appropriate and varied physical activity opportunities (in and out of school);
- Encouraging participation in later years, potentially by adapting activity to take account of declines in physical ability.

The most recent development in **health and fitness** is the *Food and Fitness – Promoting Healthy Eating and Physical Activity for children and young people in Wales: 5-year Implementation Plan*.[^18] The plan outlines required actions to improve the health and fitness of young people in Wales. Some of the key actions that have been approved to happen between 2008 and 2011 include:

- Continued expansion of the Welsh Network of Healthy School Schemes (WNHSS);
- Provision of grants for food and fitness projects in WNHSS schools;
- Provision of resources on food and fitness

[^16]: At least 30 minutes of moderate intensity physical activity on 5 or more days a week.
[^17]: Children – 60 minutes of moderate intensity on at least 5 days a week
• Provision of a physical activity resources for special schools;
• Grants to support the piloting of ways to improve access to healthier foods in leisure centres, hospitals, youth centres, care homes, pre-school settings and out of school clubs;
• Cycle training for children and young people;
• Guidance on limiting sponsorship of sporting activities by companies promoting foods high in fat sugar and salt;
• Development of a workforce training plan to support the implementation of the overall plan

The caravan industry is greatly influenced and affected by government drivers, for example the impact of tourism strategies/policy, operating/expansion requirements (e.g. planning policy) and issues surrounding maintaining safety. The strength of the tourism offer as well as developments to the transport infrastructure is important to the sector. Investment in and promotion of tourism Wales is a key driver for caravan and outdoors activity holidays and marketing support from Visit Wales is viewed particularly favorably in Wales.

Government intentions for outdoor learning, including school visits, to be part of every pupil’s experience, may also have significant impact on the outdoors sub-sector.

In playwork, there have been a number of policy initiatives in recent years, which are having an impact on the sector. The most recent has been the Play Policy Implementation Plan which was published in 2006 and aimed to explain how the principles in the play policy (play in childhood and the importance of children in our society) would be implemented. Furthermore, it outlined the government’s future approach to improving the availability and quality of play in Wales.

Playwork is still not a statutory provision in Wales, which has implications for funding. But there is a commitment in Wales to value its children and young people. Provision includes before and after school clubs, staffed open access provision, play buses, holiday playschemes, peripatetic playwork projects, residential provision, and staffed adventure playgrounds. All provision is expected to be inclusive.

Legislation

Certain parts of the sector are subject to high levels of legislation and regulation. The level of red tape can be a particular issue for sub-sectors such as the outdoors, where the burden of compliance is recognised as a challenge. Key legislation/regulations affecting the sector overall include:

• **Health and Safety** – All elements of the sector are subject to health and safety regulations. Common barriers include the required resources to comply with legislation, the cost of implementation, the required knowledge, problems with keeping up to date and general awareness;

• **Planning regulations** – This is a particular issue for both the caravan and outdoors sub-sectors;

• **Employment laws** – General compliance affects all aspects of the sector, in addition specific legislation has impacted on the sector. For example, The European Working Time Directive legislation (protecting the rights of part-time workers and minimum wage) has had an impact on sub-sectors such as health and fitness, who are more reliant on part time working and people working longer hours. The Disability Discrimination Act has also had some impact, increasing costs to businesses where they have had to meet the standards set for accessibility;

---

19 The Outdoor Census, SkillsActive, 2009
• **Competitive tendering for leisure services** - In the 1980s, Compulsory Competitive Tendering (CTT) was incorporated in new Local Government Acts, forcing local authorities to involve the private sector by putting services out to tender, including the management of sports facilities. In the area of Leisure services this has resulted in a number of Local Authorities tendering for services and commissioning provision through contractors;

• **Skill/qualification requirements** – For example, a significant development in playwork (and some outdoors centres) has been the introduction of the Early Years Foundation Stage, and the new General Childcare and Early Years Registers which have stringent qualification requirements. This has caused great difficulty for some seasonal settings such as holiday playschemes that often train seasonal staff using short courses. Finding staff with ‘full and relevant’ qualifications to work for a brief period has proved too difficult in some situations.

The caravan sector is influenced by the legislation and regulation arising from local and national government, including health and safety, gas safe (formerly CORGI), electricity installation, quangos such as OFWAT and OFGEM, the OFT, planning and the associated guidelines review, liquor licensing changes, security industries authority (doormen), and local authority plans. Also, legislation which may affect the operation of caravan parks includes The Gambling Bill (which threatens traditional entertainments like Bingo and ‘grab-a-toy’), music copyright, liquor licenses, and the legislation on smoking in public places.

SkillsActive’s research suggests that for the outdoors, the cost of compliance with legislation/regulation is an area of concern. There is also some evidence of an increased ‘compensation culture’, which increases risk for outdoors organisations. Maintaining interest in the outdoors in an increasingly risk averse society challenging.

2.2 **Secondary Drivers of Business Competitiveness**

**Globalisation**

Within the caravan industry, and to some extent the outdoors sub-sector, global drivers affect UK holiday taking, with the advent of budget airlines encouraging affordable access to foreign cities and holiday destinations. Whilst the relative strength of the UK economy in comparison to other countries may have positive or negative affects on the flow of foreign travellers and domestic tourism. The caravan sector will always be influenced by the fluctuating price of fuel and the health of the UK economy. It is important to note that the current economic climate has affected the manufacturing of caravans.

For sport and recreation, the effects of globalisation are well documented. Many major sports have an international presence and the movement of elite performers (e.g. football players) between countries is evident, furthermore within the UK there has been an increase in the number of teams with foreign owners. The sports goods market is also much globalised, where the requisite combination of low to moderate labour costs and manual skill exists.

In health and fitness, intensifying global competition continues to squeeze profits, which has encouraged many firms to merge or collaborate, so as to gain more control of the market and prices. However, larger corporations will also have to offer consumers personalised services to satisfy increasingly demanding consumers in an ‘it must fit me’ world. In this way, smaller companies and freelance instructors may be able to exploit niche markets. Equivalence and transferability of instructing/coaching qualifications works well in fitness, this is largely due to the Register of Exercise Professionals, which maps relevant qualifications against industry standards/requirements. Nevertheless, it is a major issue for the outdoors.

---

20 The Outdoor Census, SkillsActive, 2009
across Europe, and countries further afield. There are barriers to nationals from Great Britain being employed in Europe, particularly in skiing and mountaineering in Austria and France.

In **playwork**, there should be movement for playworkers across Europe in terms of transferable qualifications. Good practice coming in from other countries and vice versa can help to develop the sector and push practice forward.

**Technology**

As with the majority of industries, the development of computer technology and the growth of the internet have had a number of positive effects on the industry. The computerisation of membership databases has opened up opportunities for marketing, communications and holding personal data. Websites to promote holidays and online bookings have had a significant impact on both the **caravans** and the **outdoors** sub-sectors.

Services that the **playwork** sector offers need to respond to children’s increasing access and use of I.T. at home and at school. Since I.T. is often not available, few play settings have taken advantage of its possibilities, particularly for online marketing or using online booking systems.

Technology has influenced sports and fitness in a number of ways, such as the use of **advanced materials to improve equipment** (e.g. the use of more lightweight materials or dynamic designs) or the use of technology to **monitor and advance performance** (e.g. motion capture and advanced computer simulation). Nevertheless the role of technology has a contradictory relationship with **sport and recreation**. On one hand, sports which stress pure, physical endeavour have an almost luddite relationship to changes brought by technology.

Technological improvements have also been introduced to more **actively engage spectators** in sport such as advanced methods of viewing sport at home (e.g. High Definition, multi angle viewing and playback functions) and the 3D movie trend where plans have been unveiled to offer spectators the opportunity to watch sporting events (i.e. rugby) in 3D at selected venues. Technology is also beginning to influence the role of officiating where the use of off-field officials are used to clarify on-field decisions based on video capture.

There are also concerns that improvements in technology may have a negative impact on some sector, especially if health improvements are offered by alternative means to exercise. Improvements in services offered by digital television (e.g. interactive choices), may draw people away from spectator sports.

As prices of machines fall through import competition more people will be able to afford ‘home gyms’. Furthermore, as new technologies are introduced which, engage people in ‘fitness’ at home (e.g. Nintendo Wii) some people may opt to undertake fitness at home. Nevertheless, as technology improvements allow more people to work from home, these individuals may use their leisure time for activities away from their house, demanding more of a social experience from sports, fitness and recreation providers.

**Demographic Issues**

Although the Welsh population is growing, the number of children has been declining. Earlier analysis of consumer demand suggests that age is a contributing factor in participation. The declining pool of young people is likely to have implications on both the workforce and participation.

With regard to the workforce, there are issues surrounding the long term supply of a younger workforce, due to the decline in birth rates, and over supply of an older population, there may be a need to explore methods redressing the age profile of the workforce. Nevertheless, due to the effects of the economic downturn, the sector may be able to recruit more widely from the pool of young people than has previously been possible. Young people are amongst those to be
hardest hit by the recession, national statistics suggest that the unemployment rate of those aged 16/17 and those between 18 and 24 increased significantly between January and March of 2009. Given its youthful profile, the sector offers unparalleled opportunities for young people, either to keep them in education or to engage them in gainful employment (e.g. The Future Jobs Fund, which in Wales has attracted £27million across all sectors).

The implications of the aging population on participation/engagement with the sector will be in part dependent on how the sector engages with the local population to improve their involvement, government drivers and the extent to which the sector responds to the needs of different demographic groups.

The Welsh Health Survey 2008 also suggests that obesity is an issue in Wales, around 57% of adults are classified as overweight or obese (21% are obese). Analysis of previous health surveys in Wales suggests that the proportion of obesity is rising, although it is slightly lower than the proportion recorded in England (24% obese). Childhood obesity is also relatively high in Wales. Research suggests that around 22% of boys and 17% of girls are classified as overweight or obese.

21 www.statistics.gov.uk/cci/nugget.asp?id=2205
22 http://wales.gov.uk/topics/educationandskills/educationskillsnews/futurejobsfund/?version=1&lang=en Accessed 01/02/10
23 http://www.wales.nhs.uk/sites3/Documents/568/Obesity%20The%20Facts%201%20ENGLISH.pdf
3. CURRENT PERFORMANCE – WHAT IS DRIVING CHANGE?

3.1 Performance and Competitive Position of the Sector

Productivity increased in the SkillsActive sector in Wales between 1995 and 2004 and forecasts undertaken in 2005 expected productivity to continue to grow until 2014. Furthermore, the majority of employers report that their business turnover in 2005 had increased or remained stable.

Performance is affected by a range of issues including the policies of government, employment trends and skills levels, rates of participation, investment and income, competition, innovation, enterprise and the economic climate.

In terms of participation, around 30% of adults in Wales meet the guidelines for physical activity, with men being more likely than women to meet the guidelines. There is a particular need to address the 34% of adults that are currently inactive, with the incidence of inactivity increasing with age. Recent Government policy has outlined the intention to increase the proportion of adults and children meeting guidelines for physical activity by 5% over the next 5 years.

Income and investment streams vary across the SkillsActive sector, some are reliant of public funds, whilst other are affected by consumer spending and private investment. The sector has seen some significant investment in infrastructure and delivery as a result of government policies to improve provision (e.g. the development of the Wales National Veledrome). Furthermore, the sport and recreation sub-sector is supported by a range of funding opportunities and grants such as The Community Chest fund, Sportsmatch Cymru and the Sports Council for Wales’ Development Grant. Commercial performance is of particular relevance in both the private health and fitness sector and the caravan industry. For public health facilities, local authority investment remains a key driving factor.

All sub-sectors are subject to competitive forces, with the main issues affecting the sector including the choice of activities, the range of alternative facilities, the quality/standard of facilities and maintaining pricing strategies. For the public sector, there is an element of internal competition as local authorities seek to identify which activities to deliver through public facilities. This means that there is often competition in timetables for facility time. The health club sector remains very competitive, with clubs fighting it out to attract new customers and retain existing members, often leading to competitive pricing strategies.

Innovation within the sector is likely to include developing facilities and services to attract and retain customers. For many sub-sectors there is a need for innovative thinking in engaging inactive populations and stimulating the demand for those engaged in some capacity already. This may include an innovative approach to designing and co-ordinating activities for different demographic groups. For the caravan sub-sector there is also innovation in terms of product design e.g. ensuring newly manufactured vehicles have the latest gadgets.

Fundamentally, enterprise can be described as seizing new business opportunities and the fostering of business start up and growth. Inevitably, this is linked to all other drivers of business performance (investment, competition, innovation, knowledge and skills and the economic climate). The health and fitness sub-sector has seen a growth in the number of facilities in Wales and the sector more widely has been subject to a range of mergers, acquisitions and
takeovers. The level of business development is however limited by a range of factors such as investment, demand and the economic climate

### 3.2 The Current Economic Climate

Currently feedback from the sector is that the economic downturn is having a varied impact on the sector’s employers in Wales. This is partly due to the way private, public and voluntary organisations in the sector operate and are funded. Nevertheless, some of the generic issues potentially facing the sector include:

- A drop in participation/consumer spending;
- Maintaining profitability/covering operational costs;
- The threat of increased competition (e.g. pricing competition to retain/ attract customers);
- Restricted access to credit for maintenance/development/survival.

### Sport and Recreation

The government’s strategy for sport and physical activity (Climbing Higher) sets out the government’s plans to invest in programmes to increase participation. As yet there is a lack of robust evidence to suggest that the recession has impacted on voluntary /public sport, where fixed periods of funding may have been agreed. Nevertheless, the sub-sector could be affected in the following ways:

- Fluctuations in the rates of participation and volunteering – the sector may see positive or negative effects. For example the level of volunteering could increase as a result of increasing leisure time but participation could be negatively affected due to falls in disposable income;
- Be affected by a loss of income (particularly voluntary organisations). Recent research suggests that sports clubs reported falling average profits between 2007 and 2008;
- See an impact on the uptake of qualifications – The increased cost of coaching qualifications for volunteers following the introduction of the UK Coaching Certificate, may dissuade volunteers from undertaking qualifications;
- See a loss of endorsements or sponsorship deals for teams, athletes/professionals (e.g. RBS ending its sponsorship with Williams and Honda withdrawing from Formula 1);
- See falls in ticket sales for events/games, loss of broadcasting deals or delays in development plans;
- See changes to the patterns of participation in sport and recreation with some clubs reporting a rise in pay-as-you-play but a decrease in membership e.g. golf, whilst some ‘free’ recreational activities are seeing increases in activity (e.g. cycling).

### Health and Fitness

Within the private sector there are some indications that the economic downturn has impacted on investment in training and development and that membership numbers and vending sales are showing signs of decline as a result of reduced disposable income. There has been a slight shift from private club membership to public sector pay-as-you-go leisure facilities, and there is evidence that clubs offering lower membership fees and shorter commitment periods are being most successful.

Again, anecdotal evidence suggests that some public provision is being forced to consider ways to save on costs. Whilst the demand for “sessional” leisure and recreational activity appears to be holding out, lower demand for fixed membership contracts and higher operating costs, particularly energy prices for facilities with swimming pools, may impact on their viability.

---

24 Survey of Sports Clubs, CCPR, 2009
The health and fitness sector is not recession proof and key challenges include:

- Identifying how to address declining membership numbers as a result of reduced disposable income;
- Dealing with potential shifts in patterns of participation (private to public);
- Dealing with competition – there is some evidence that clubs are offering reduced membership/joining fees and shorter commitment periods;
- Addressing rates of drop off especially amongst young people who may be the worst affected by the current recession;
- Identifying how to engage inactive populations and retain existing customers/members.

The Outdoors

Within the outdoors sector, indications suggest that bookings remain constant and in line with previous years. Bookings from local authorities or schools are likely to be resistant to recessionary pressure. The outdoors may even benefit from any trend to “holidaying at home”.

Nevertheless, research undertaken by SkillsActive in 2009\textsuperscript{25} highlighted specific challenges for outdoors employers in the current economic climate, which included:

- Difficulties attracting and maintaining clientele, especially given that some outdoors activities are directly associated with the availability of disposable income;
- The impact of currency fluctuations on non-domestic business;
- Difficulties accessing finance either through financial institutions (loans) or funding opportunities.

Caravans

The most pronounced impact of the recession has been on the caravan industry. Manufacturing and registration of new caravans has declined dramatically over the last 12 months, causing reduced production, redundancies and business difficulties for manufacturers and dealers. The vehicle scrappage scheme\textsuperscript{26} is not expected to be of much assistance as recreational vehicles like motorhomes are used less than other road vehicles, have lower mileages for their age, and are less frequently traded in. The second-hand market is reported to be faring better.

With regard to caravan parks, The National Caravan Council predicted that there would be an extra two million caravan holidays in 2009, taking the number to 14 million, as a result of people seeking better value holidays at home. The sector may benefit from people being mindful of the economic climate and choosing to take a domestic holiday rather than travelling abroad.

Playwork

Anecdotal evidence also suggests that the playwork sub-sector could be impacted by the recession. If disposable income declines and/or unemployment increases, the demand for children’s activities and after school clubs etc may be affected. Increasing costs and the availability of funding may also impact on the survival of some playwork organisations.

\textsuperscript{25} The Outdoor Census, SkillsActive, December 2009
\textsuperscript{26} National Caravan Council
3.2.1 Rising Costs

The whole sector has also been affected by rising operating costs. In recent research undertaken with the outdoors sub-sector a number of organisations reported that delivery and operating costs are increasing, resulting in difficulties in maintaining pricing strategies and ensuring the sustainability of the business:

Key costs across the active leisure, learning and well-being sector include:

- Increasing energy prices and charges for utilities – this may impact severely on operators whose facilities include swimming pools, threatening their viability;
- Increasing fuel and transport costs – this may be a particular issue across sport and recreation, the outdoors and the caravan sub-sector;
- Insurance costs – for example there are difficulties associated with the outdoors industry being perceived as more “high risk”;
- Hire costs and availability of facilities – this is identified by two thirds of sports clubs without their own facilities as a challenge;
- The cost of compliance with legislation and regulation – in terms of staff time to complete insurance and tax forms, and the new skill needs for funding applications;
- Potential rises in tax and cuts to public spending would also impact on the sector.

3.2.2 The Impact on Skills

Employers react in a range of different ways with regard to training and development when faced with economic downturn. Potential responses include:

- Streamlining/implementing more precise targeting of training – employers identify the right skills for investment, and ensure that these are utilised to their full effect to increase competitiveness, and prospects for present survival and future growth;
- Reducing the level of training undertaken and/or reduce training budgets;
- Changing the type of training undertaken or opting for in-house/on the job training;
- Exploring alternative training options, e.g. seeking support through government initiatives/schemes;
- Undertake training to solve skills gaps created by downsizing or changing workloads.

The development of skills and training is crucial in ensuring that the economy can successfully move from a period of recession to strong growth. For those not in employment or training, there is a need to ensure that their skills and experience are reflective of the skills needed by employers. For organisations and existing employees there is a need to invest in training to ensure sustainability and/or business growth.

Research undertaken by SkillsActive identifies that there are particular recruitment difficulties and skills issues facing employers in the sports, fitness and outdoors sub-sectors, with particular job roles considered hard to fill being sporting officials (paid and voluntary), coaches, teachers, instructors and activity leaders (paid and voluntary) and operational help (volunteers).

The most common skills in need of improvement amongst existing staff are considered to be specific technical skills, customer handling, communication, management and Welsh language skills.

27 The Outdoors Census, SkillsActive, December 2009
28 Survey of Sports Clubs, CCPR, 2009
29 National Audit of Skill Needs: Sport, Fitness and the Outdoors, October 2008 (SkillsActive/Sport England)
Research undertaken to explore the impact of the recession\textsuperscript{30}, identifies two key skill areas that employers commonly identify as important in times of recession, namely management and leadership and customer service. Maintaining customer satisfaction is essential and as a service based sector, active leisure, learning and well-being employers recognise the importance of maintaining customer service, especially when faced with the prospect of a declining customer base\textsuperscript{31}. Customer services research, undertaken in 2008 suggests that ensuring good levels of customer service will be important in delivering a successful 2012 Games.

Furthermore, the research identifies that service industries should strive to deliver a ‘World Class’ service, which can be defined as a \textit{consistently high level of service which meets and strives to exceed customer expectations}. The report also draws the conclusion that customer service has to be embedded into organisations and that leaders and supervisors need to have good customer services skills and lead by example.

As the Sector Skills Council with the lead responsibility for management and leadership, SkillsActive recognises the importance of developing these skills, especially in times of recession. These skills are important in managing stability in uncertain times and planning for growth, post recession.

\textsuperscript{30} CBI, SEEDA

\textsuperscript{31} World Class Customer Service...for 2012 and Beyond, SSC Cluster Group, December 2008
4. **CURRENT SKILLS NEEDS**

4.1 **Where existing supply does not meet employer needs**

The table below presents the main core occupational groups to active leisure, learning and well-being. For each occupation the proportion of the workforce that they account for, the level and type of skill requirements for the job and current skill gaps are shown. Qualification levels have been used as a proxy for skills to determine the shortfall.

Table 4.1: Overview of core occupational groups and their skill priorities

<table>
<thead>
<tr>
<th>Broad Occupation Group</th>
<th>Examples</th>
<th>% of total workforce</th>
<th>Skill Needs Level (basic, low, intermediate, high)</th>
<th>Type of Skills Needed</th>
<th>Skills most in need of improvement</th>
<th>% of employers reporting skills gaps</th>
<th>Min level of skill required</th>
<th>% qualified to min skill level</th>
<th>Num not qualified to min skill level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal service</td>
<td>Playworker, playgroup leaders/assistants, sport and leisure assistant, leisure centre attendant, lifeguards, recreational assistants</td>
<td>21%</td>
<td>INTERMEDIATE</td>
<td>Customer handling, Technical &amp; practical, team working, health &amp; safety, first aid</td>
<td>Team working Customer handling Technical &amp; practical Communication</td>
<td>17%</td>
<td>2/3</td>
<td>21%</td>
<td>1300</td>
</tr>
<tr>
<td>Managers</td>
<td>Leisure and sports manager, riding school owners, caravan park owners</td>
<td>17%</td>
<td>HIGH</td>
<td>Management, leadership, communication, team working, people skills, finance, HR, planning &amp; organisation</td>
<td>Management Communication</td>
<td>11%</td>
<td>3/4</td>
<td>37%</td>
<td>1860</td>
</tr>
<tr>
<td>Associate professional and technical</td>
<td>Instructors, coaches, activity leaders, sports players, swimming teachers, sports development officers, referee, umpire, outdoor instructors/ tutors, youth and community workers</td>
<td>17%</td>
<td>INTERMEDIATE</td>
<td>Technical &amp; practical, communication, customer handling, management, team working, IT, people skills.</td>
<td>Team working Customer handling Technical &amp; practical Communication</td>
<td>21%</td>
<td>2/3</td>
<td>34% (not to L3)</td>
<td>1050</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>14% (not to L2)</td>
<td></td>
</tr>
<tr>
<td>Elementary</td>
<td>Leisure attendants and security officers / attendants, house keeping</td>
<td>17%</td>
<td>LOW</td>
<td>Team working, problem solving, health &amp; safety, crowd control.</td>
<td>Team working Customer handling Technical &amp; practical Communication</td>
<td>33%</td>
<td>2</td>
<td>45%</td>
<td>2260</td>
</tr>
</tbody>
</table>

---

32 LFS 2008 (Average of annual quarters)  
33 Low: qualified to at least level 2; intermediate: qualified to at least level 3; high: qualified to at least level 4.  
34 Future Skills Wales 2005
4.2 Recruitment Difficulties

Evidence from the Future Skills Wales (FSW) survey suggests that around 24% of active leisure, learning and well-being establishments had a vacancy at the time of the survey. This equates to an estimated 750 vacancies, which is equal to around five per cent of employment in the sector as a whole. The level of vacancies recorded in the sector is higher than that for the Welsh economy as a whole, where 21% of establishments report vacancies.

Vacancies may create difficulties if they become hard-to-fill. The data shows that 11% of establishments in the SkillsActive sector have hard-to-fill vacancies. Again, the level of these vacancies is higher in SkillsActive than in the Welsh economy as a whole (11% of compared with ten per cent of establishments respectively). The rate of vacancies is also higher than across all industries (1.9% of employment compared with 1.2% as a whole).

Forty-five per cent of SkillsActive establishments with vacancies found them hard-to-fill in 2005, and 38% of those attributed this difficulty to a skills shortage.

Hard-to-fill vacancies in the SkillsActive sector are most likely to be in elementary occupations (34% of all hard-to-fill vacancies), personal service occupations (26%) and associate professional occupations (13%).

National research with caravan parks suggests that around 40% reported at least one vacancy and 57% of employers with vacancies found them hard-to-fill. Recruiting enough cleaners and housekeepers is the major challenge, followed by bar managers and staff, receptionists, wardens or assistant wardens, cooks and chefs.

Health and fitness employers in both the public and private sectors reported that class instructors (circuit training and aerobics instructors) were proving very difficult to recruit across Wales. General managers of a high quality were also difficult obtain of as well as GP referral specialists.

Sport and recreation employers reported a general feeling that recruitment of managerial level staff was difficult across Wales. Related to this was a feeling that too many graduates were leaving further and higher education with the wrong skills.

A number of major employers in Wales (primarily public sector) identified that they were ‘fishing from the same pool’ in terms of recruiting people. There was a general feeling that there was a strong supply of high calibre people available for sports development roles with a healthy level of competition. Leisure related posts however were considered far more difficult to recruit for.

Recruiting for voluntary posts was also highlighted as becoming more difficult as time demands and requirements increase. Respondents identified that developments need to include better co-ordination and more formal management of the volunteer base. Coaching in particular was highlighted as a serious area of concern in terms of lack of volunteers coming forward. ‘word of mouth’ was mentioned as being a particularly important way of recruiting volunteers.

The most common action taken to address hard-to-fill vacancies was to use a more extensive range of recruitment channels than normal (41%).

---

3 Caravan Parks Report 2004
4 SSA Visioning Workshops with the Fitness sector, 2005
7 SSA Visioning Workshops with the Sport sector, 2005
4.3 Skills Shortages

Overall, 40% of hard-to-fill vacancies in the SkillsActive sector were reported as being hard-to-fill because of a skills-related reason. The most common single reason was that the job entails shift work or long, unsocial or irregular hours (28%) or that individuals lack qualifications that the organisation demands (27%).

Skill shortage vacancies in the SkillsActive sector were most common in personal service occupations (44% all skill shortage vacancies) and associate professionals (35%). The types of occupations which were most commonly cited as being hard-to-fill were similar to those stated as having skills gaps: i.e. coach/ fitness instructor/ personal trainer, playworkers but also recreation assistant/ leisure attendant and cleaner/ housekeeper.

The FSW survey suggests that customer handling skills and team working skills are the most difficult to secure. Following this, employers found it difficult to obtain technical and practical skills, communication skills and problem solving skills.

4.4 Skills Gaps

Around 15% of employers in the SkillsActive sector stated that some of their current employees were not fully proficient in their existing role. This equates to some six per cent of the overall workforce. The proportion of active leisure, learning and well-being establishments reporting skill gaps was lower than that recorded across all industries in Wales (20%). Nevertheless, the proportion of skills gaps by employment is on par.

The most common occupations with skill gaps in the SkillsActive area were elementary occupations (33% of all skill gaps), associate professionals (21%) and personal service occupations (17%).

The skills most commonly noted as being deficient were team working skills (72% of all jobs) and customer handling skills (70%). Technical and practical skills and communication skills were more in need of improvement for the SkillsActive sector than the Wales economy as a whole. There was also a greater deficiency for Welsh language skills in the SkillsActive sector than there is in the whole economy.

Sector specific research undertaken in 2009 also identifies that skill gaps exist in communicating with customers and customer handling.

The majority of employers (89%) within the SkillsActive sector had taken some actions to address the skills gaps amongst some of their staff. These were mainly internal responses, such as providing further training and development (84%), changing work practices (59%), increasing or expanding trainee programmes (51%) or by reallocating work within the company (49%). However, some employers did try and recruit their way out of skill gaps – by expanding recruitment (30%) or by expanding recruitment channels (19%).

4.5 Specific Skills Needs

Technical and practical skills are considered essential to a large proportion of SkillsActive sector occupations for legislative or regulatory reasons. Many roles in sport and recreation, health and fitness and the outdoors work with under eights in educational or care settings, which comply with the Ofsted standards for supervision.

---

35 A Workforce Development Plan to support the delivery of Climbing Higher, Food & Fitness and Quality of Food. Draft Consultation, Wavehill Consulting, 2009
Additionally, employers have to comply with health and safety guidelines for use of equipment/swimming pool/outdoors terrain. Consequently the same requirements apply to the need for staff to have achieved an industry-specific level 2 qualification, and that the minimum proportion of staff qualified to that level should be 50% or greater in order to supervise other less-qualified colleagues.

In rural locations, a coach or instructor will usually require a minibus driving licence, which can only be attained by the age of 21.

**Welsh language skills** have become increasingly important in Wales due to the Welsh Assembly Government’s long term vision to have a bilingual nation. The increased use of the Welsh language will have implications on the skills needs of the sector, such as the need to communicate in English and/or Welsh.

**Maintaining safety** is also an important skill requirement across the sector, for example, within the **caravan industry** Holiday Parks particularly value CORGI recognised gas competence for handling Liquid Petroleum Gas (LPG).

There is an increasing need to engage non-participating children and adults in physical activity and healthy living as well as improve latent demand. There is therefore a growing need to ensure that employers and their workforces have the necessary skills to engage disengaged and/or hard to reach groups. In particular **communication skills** and skills in **working with the community and difficult populations** are likely to become more important. Recent research suggests that there are concerns that some employees do not have the required skills to deal with hard to engage populations and relate to their needs. As such they may require specialist skills such as awareness of disability issues, mental health issues and drug abuse.

Analysis of competitiveness drivers also suggests that **sustainable funding** is an issue for certain parts of the sector. In order to support the sector in being able to access funding, there may be a need to equip organisations with the skills to search for and apply for funding opportunities. Potential skill areas for development include fundraising, bid writing, tendering, procurement practices, writing service level agreements, project development and operational skills to improve sustainability.

---

36 [http://wales.gov.uk/topics/welshlanguage/?lang=en](http://wales.gov.uk/topics/welshlanguage/?lang=en) accessed on 25/01/10
37 A Workforce Development Plan to support the delivery of Climbing Higher, Food & Fitness and Quality of Food. Draft Consultation, Wavehill Consulting, 2009
5. ANTIPOCATING WHAT LIES AHEAD

Annual output growth rates in the Wales active leisure, learning and well-being sector have fluctuated. However, generally output growth has been strong (with the exception of a brief downturn between 1997 and 1998) and tended to outperform the whole Wales economy as a whole. Output by the active leisure, learning and well-being sector in Wales grew over one per cent faster than the whole Wales economy per year, with growth rates of 3.8 and 2.6 per cent respectively. In 2005 and 2006 output in the sector was forecast to grow at a faster rate than that experienced in 2004. However, the rate of growth was expected to remain steady from 2007 onwards, and fall below the whole economy between 2008 and 2016.

Figure 5.1: Annual rate of growth in GVA - Wales

The Wales active leisure, learning and well-being sector experienced an annual average growth rate of 2.7 per cent in employment between 1999 and 2004. As in other service industries, this represented strong growth when compared with the whole Wales and whole UK economies (1.1 per cent). The caravans, playwork and the outdoors sectors experienced particularly strong growth rates, well above the sector average.

Nevertheless, average annual employment figures suggest that employment in the sector has decreased by around six per cent between 2007 and 2008. The majority of sub-sectors appear to have suffered declines in employment, with the exception of health and fitness which has seen an increase of around nine per cent. The Welsh economy as a whole remained relatively stable over the same period, showing growth of 0.4 per cent.

The occupational profile of the Wales active leisure, learning and well-being sector was not expected to change dramatically, but marginal growth was expected in the number of management, secretarial and elementary personal service roles within the sector.

5.1 Golden Decade of Sport

The sector has a number of reasons to feel optimistic as we embark on the “Golden Decade of Sport”, which will see major sporting events held at different locations across the UK, attracting world class competitors, and promoting the visitor economy.
In 2010, Newport in Wales will be host to the Ryder Cup. This leading tournament in the world golfing calendar is likely to bring a number of benefits to Wales. Not only will Wales see tangible benefits from hosting the tournament (e.g. increased tourism, job creation), it is hoped that the tournament will ensure a legacy for Wales, for example, developing Wales as one of the leading destinations for golfing breaks and raising the profile of golf across the nation.

The 2012 Olympic and Paralympic Games also offer opportunities for Wales. For example, The Millennium Stadium in Cardiff has been identified as one of the official Olympic Games venues for football.

To meet expectations for a lasting legacy for sport, a skilled workforce is essential and a coordinated approach by employers to develop the workforce is vital.

### 5.2 Future Skills Requirements

Although the qualifications profile of the active leisure, learning and well-being workforce was not expected to change significantly between 2004 and 2014, there are emerging skill requirements which will affect the sector in the future.

Key skills issues currently facing the sector are likely to remain prominent in the active leisure, learning and well-being sector in the future. For example customer handling and team working skills were highlighted as the two key skills missing from potential entrants into the sector (as skills shortage vacancies) and those already working in the sector (as skills gaps).

Across the Welsh economy as a whole, Welsh language skills are identified as an important area of delivery. The deficiency of Welsh language skills is a historic problem for the active leisure, learning and well-being sector and must be addressed in the content of HE /FE qualifications in the future.

The FSW survey asked employers whether commonly identified issues/drivers had affected the skills that they required of their workforce over the last 3 years. New legislation or regulatory requirements were identified as the most common areas of impact. In addition the introduction of new computer systems had affected half of all respondents and government policy / initiatives / new funding had also affected many employers.
Key drivers of performance and competition are likely to have the following impact:

- **Participation** - In meeting the government agenda to increase participation, there may be a greater requirement on sector employers to communicate with different participating groups. There is a need to engage those that do not participate in activity at all as well as stimulate usage amongst lower level users. The communication channels and marketing messages are likely to differ across these target audiences and as such different skill sets will be required to ensure participation. Likely skill requirements include: improved communication, outreach skills, basic marketing/promotional skills and customer handling skills (including empathy with differing needs of hard to reach groups). Technical and practical skills may also be affected as workers are expected to deal with groups with different needs (e.g. older participants or those with varying levels of fitness/medical issues).

- **Joining up delivery services** - In health and fitness progress has been made in Wales in terms of working in partnership (primarily through Local Authorities working with each other and the Assembly). However, the qualitative workshops undertaken as part of SkillsActive’s SSA identified that there is plenty of scope for improvement by, for example linking the industry in with GP referrals, primary care trusts, local health boards and hospitals. In terms of skills, improvements to partnership working are likely to have implications on communication skills, IT/data management skills and general management skills.

- **The voluntary workforce** - Recruiting for voluntary posts is often identified as becoming more difficult due to time demands and increased requirements. Key developments need to include better co-ordination and more formal management of the volunteer base by lead agencies/governing bodies. Coaching in particular was highlighted as a serious area of concern in terms of lack of volunteers coming forward. Recent research suggests that volunteers do not always have access to the main training budgets and as such may not be involved in training and development. It is recognised that volunteers may however need a range of basic requirements such as first aid, health and safety, child protection, fundraising and generic skills.

- **Professionalisation of the industry** - The health and fitness sector is keen to raise its profile and has already taken steps toward this through the Register of Exercise Professionals (REPS). The register has mainly been adopted in England but has been adopted in Wales. There are numerous benefits to organisations adopting the Register as their standard mainly by increasing trust and confidence in the industry, which in turn can attract investment. It enables transparency of qualifications and facilitates and encourages upskilling within the industry for both the organisation and the individual. Continued professionalisation of the health and fitness industry as well as improvements in the playwork sector are likely to impact on the technical skills of the sector.

---

6. SECTOR SOLUTIONS

To date SkillsActive have implemented a range of solutions to support the sector, this section outlines some of those key developments and highlights future priorities for action.

SkillsActive has created a devolved committee structure to provide a framework for employer leadership across the UK and reflect the specialist needs of the industry sub-sectors, while maintaining common standards across the devolved administrations. SkillsActive works with sector professional bodies and trade associations who represent employer groups to promote workforce development. Employers contribute to the development of national occupational standards, new courses and programmes, such as Modern Apprenticeships. The Sector Qualification Strategy (SQS) includes country and sector action plans based on robust labour market intelligence and bespoke research.

The development of the new Qualification and Credit Framework (QCF) will open up opportunities for the bite-sized learning that the industry demands, and link these credits into full qualifications. The QCF will feature strongly as part of the Credit and Qualifications Framework for Wales (CQFW). SkillsActive will also work to attract additional monies into the sector from government funding schemes, ESF and other sources.

The Register of Exercise Professionals (REPs) was set up to help safeguard and promote the health and interests of people who are using the services of those coaching, teaching and instructing in the exercise and fitness industry. The Register uses a process of self-regulation that recognises industry-based qualifications, practical competency, and requires fitness professionals to work within a code of ethical practice. To date it has over 27,000 members and is accepted as a voluntary license to practice by the majority of education providers and employers in the industry. It has been adapted and is being rolled out across Europe and SkillsActive is working to ensure compatibility and a consistent approach. The Register has been operating in Wales since its inception, and as a result of direct funding support from both the Welsh Assembly Government and the Sports Council for Wales it has developed a clear Welsh identity. Around 1000 members of the Register currently reside in Wales.

SkillsActive is a lead member of three European networks, holding the presidency of the European Observatory of Sport and Employment (EOSE), the vice presidency of the European Association of Sports Employers (EASE) and member of the European Health and Fitness Association (EHFA). The sector is one of four to pilot/test the implementation of the new European Qualifications Framework (EQF) lead by QCA with three implementation projects:

1. ECVET – establish standards for a health and fitness credit based VET system.
2. European Outdoor Animators – setting standards for outdoor sport and recreation.
3. EQF in sport – harmonising qualifications in sport across Europe.

Within England, the sector has seen the introduction of the National Skills Academy for Sport and Active Leisure. The Academy aims to capitalise on the input of employers, individuals and providers to become the one-stop shop for the industry’s training needs. SkillsActive has had a long desire to establish an Academy Model that is fit for purpose across Wales. The Welsh Assembly Government is currently researching the potential for Academies to operate within Wales, and this could lead to a clear policy statement. SkillsActive are optimistic that this will present an opportunity to develop an Academy Model that could be rolled out in the form of employer learning hubs.
The following tables summarise SkillsActive’s progress to date with regard to each priority area and the future action that is still required.

### 6.1 Improve Recruitment and Retention

<table>
<thead>
<tr>
<th>Examples of progress</th>
<th>Further action required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved careers service — developments are continuously being made to information on the online careers portal.</td>
<td>Maintain a clear map of careers and promote career progression pathways using illustrative case studies.</td>
</tr>
<tr>
<td>First careers event held dedicated to sport and leisure</td>
<td>Continue improving the breadth and relevance of the SkillsActiveCareers website to increase the sector’s appeal.</td>
</tr>
<tr>
<td>Events to promote qualification/career pathways.</td>
<td></td>
</tr>
<tr>
<td>Sports industry interactive tube map — development of a careers tool to show potential progression routes.</td>
<td></td>
</tr>
<tr>
<td>Worked with Careers Wales to promote the sector as a positive careers choice to wider populations and contributed to the development of the ‘Best Practise Sheets’ for employers who take young people on work experience.</td>
<td></td>
</tr>
<tr>
<td>activepassport™ — expansion of this tool that gives practitioners and employers an online “real-time” record of achievement and continuous professional development, with 49,000 issued by January 2009. Playwork and caravanning have a tailored version and REP’s can provide it to members.</td>
<td>Further expand the reach of activepassport™ by incorporating it into funding bids and new projects.</td>
</tr>
<tr>
<td>Working with ‘Move On’ SkillsActive has developed customised Basic Skills Toolkits for employers across Wales’ playwork and sport and recreation sub-sectors</td>
<td>Through a successful bid to the Welsh Assembly Government, develop another Basic Skills Toolkit for Wales’ health and fitness sector</td>
</tr>
<tr>
<td>On the back of investment from the Sports Council for Wales, SkillsActive are piloting the development of ‘Active Analyser’ which is a tool to help support workforce development planning within the workplace.</td>
<td>Continue to support the ‘Active Analyser’ pilots and roll out to another two local authority areas.</td>
</tr>
</tbody>
</table>

### 6.2 Professionalise and Upskill the Existing Workforce

<table>
<thead>
<tr>
<th>Examples of progress</th>
<th>Further action required</th>
</tr>
</thead>
<tbody>
<tr>
<td>The SkillsActive Step Up Sector Programme has been used to provide a 50% funding contribution when up-skilling around 150 local authority fitness instructors across Wales</td>
<td>Explore further up-skilling opportunities through the emerging Sector Priorities Fund.</td>
</tr>
<tr>
<td>Working with the Sports Council for Wales to roll out various tools to support workforce development planning</td>
<td>Reduce the proportion of our workforce without a level two qualification.</td>
</tr>
<tr>
<td>Continued to build upon the successful work of the Register of Exercise Professionals (REPs) and ensured its use is widespread across the sector in Wales.</td>
<td>.</td>
</tr>
<tr>
<td>Developing the role of officials – SkillsActive has worked with the UK NGBs to raise the profile of officials, support their training and produce a suite of NOS for officiating in sport.</td>
<td>Continue to develop an integrated, industry endorsed CPD package.</td>
</tr>
<tr>
<td>Endorsed training – To guarantee the quality of courses, SkillsActive operate an endorsement scheme whereby training programmes are approved by a playwork endorsement panel.</td>
<td>Support the development and implementation of codes of practice and quality mark scheme.</td>
</tr>
<tr>
<td>Similarly, an exercise and fitness technical group (TEG) endorse CPD through formal evaluation. Training provider and employer training licences have also been introduced to recognise endorsed training that does not go through TEG.</td>
<td>Extend professional registers and licensing arrangements where there is employer demand.</td>
</tr>
<tr>
<td>Pathways to Playwork – a free online interactive tool which provides access to sector approved qualifications and endorsed playwork training courses by quality assured training providers.</td>
<td>Work to ensure that UKCC/NGB qualifications</td>
</tr>
</tbody>
</table>
are integrated onto the QCF and are eligible for public funding.

<table>
<thead>
<tr>
<th>Nationally:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• NVQs – over 256,000 people have registered on sector S/NVQs since the early 90s and almost 150,000 have achieved a certificate. 2008/09 saw a 10% increase in registrations to 26,236, resulting in 22,000 certifications – 30% more than the previous year.</td>
</tr>
<tr>
<td>• Apprenticeships – Between August 2007 and April 2008, around 2,310 people enrolled on Apprenticeships with 770 people on Advanced Apprenticeships. Apprentice completion rates grew by 24% in 2008/09 to 1,690 and Advanced Apprenticeship completions increased three fold to over 470.</td>
</tr>
</tbody>
</table>

| • Continue to promote take-up of relevant qualifications, including Apprenticeships. |
| • Explore funding opportunities for older apprentices. |

### 6.3 Match Supply to Demand

<table>
<thead>
<tr>
<th>Examples of progress</th>
<th>Further action required</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Worked in partnership with Play Wales in the development ‘Playwork Wales’ as the National Centre for Playwork Training in Wales</td>
<td></td>
</tr>
<tr>
<td>• Continued discussions with the Welsh Assembly Government in relation to the development of the SkillsActive Wales Learning Hub model.</td>
<td></td>
</tr>
<tr>
<td>• Development of the Sector Qualification Strategy Action Plan for Wales – establishing a vision for a sustainable system of education, training and development, the SQS is viewed as the vehicle to deliver qualifications and training that are appropriate to the sector.</td>
<td></td>
</tr>
<tr>
<td>• Standards review and development – CITO will be developing functional and occupational maps to shape NOS at levels 2 and 3. SkillsActive is currently reviewing the NOS for sports development with a community development unit. SkillsActive has worked with BASES and a number of key stakeholders to produce new draft NOS for a sport and exercise scientist. The outdoors sector has developed the Outdoors Induction Standard.</td>
<td></td>
</tr>
<tr>
<td>• AASE – with industry experts and partners, SkillsActive has developed and promoted the Advanced Apprenticeship in Sporting Excellence (AASE) framework, designed to develop talented 16-19 year old athletes while continuing with GCSE or A level study. In England, sports delivering AASE include football, rugby union, golf, cricket, tennis, aquatics, netball, rugby league, athletics, judo, basketball and motor sport.</td>
<td></td>
</tr>
<tr>
<td>• Continued to support the development of the Work Based Learning Pathway Programme (WBLP) in Sports Management Leadership and Coaching across a range of local authority areas. This vocational pathway allows students aged 14-16 to combine vocational and academic learning</td>
<td></td>
</tr>
<tr>
<td>• Development of new qualifications – The new English Diploma in Sport and Active Leisure was developed in consultation with the industry, providers and key stakeholders as part of the 14-19 education reforms. A mix of classroom and practical study, it will be taught at three levels from September 2010. The Diploma in Society, Health and Development is now being delivered. Skills has explored the integration of the Diploma into Wales, and understands that the Principal Line of Learning will be offered through the Welsh Baccalaureate</td>
<td></td>
</tr>
</tbody>
</table>

| • Explore funding opportunities for a SkillsActive Wales Learning Hub through the emerging Sector Priorities Fund. |
| • Enhance existing and develop new NOS to meet industry needs. |
| • Employer-led SQS action plans. |
| • Caravan standards will be developed in partnership with IMI (the Automotive Industry SSC) and SEMTA. |
| • SkillsActive will work with the Welsh Assembly Government to explore the piloting of AASE across a small cohort of sports in Wales. |
| • Continue to co-ordinate the successful WBLP programme across Wales. |
| • We will continue to work with the Welsh Assembly Government as part of the 14-19 Learning Pathways, and specifically related to the development of Principal Learning Qualifications (via the Welsh Baccalaureate). |
6.4 Re-direct Funding for Training

<table>
<thead>
<tr>
<th>Examples of progress</th>
<th>Further action required</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>he SkillsActive Step Up Sector Programme</strong> has been used to provide a 50% funding contribution when up-skilling around 150 local authority fitness instructors across Wales.</td>
<td><strong>Continue to seek parity in levels of funding between England and Wales.</strong></td>
</tr>
<tr>
<td><strong>Nancy Ovens Bursary</strong> – This innovative bursary scheme allows people to create their own training experience from a wealth of potential opportunities to develop new and improved skills.</td>
<td><strong>Partnership working to ensure an effective officiating bursary programme for the Olympics.</strong></td>
</tr>
<tr>
<td><strong>Work Based Learning Pathways (WBLP)</strong> – funding has been secured in various regions to improve the coverage of Young Apprenticeships.</td>
<td><strong>Promote the sector’s contribution to government policy objectives to justify funding support for its workforce.</strong></td>
</tr>
<tr>
<td><strong>Continue to develop innovative solutions to investment in skills.</strong></td>
<td><strong>Continue to develop innovative solutions to investment in skills.</strong></td>
</tr>
<tr>
<td><strong>Campaign for more funding flexibility to meet the training needs of employers.</strong></td>
<td><strong>Campaign for more funding flexibility to meet the training needs of employers.</strong></td>
</tr>
</tbody>
</table>

6.5 Increase Sector Investment in our People

<table>
<thead>
<tr>
<th>Examples of progress</th>
<th>Further action required</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Development of tools and workshops</strong> to help employers develop their own workforce development plans.</td>
<td><strong>Encourage employers to develop their workforce using innovative tools.</strong></td>
</tr>
<tr>
<td><strong>Development of the Active Analyser tool</strong> – enhancements to the workforce development tool being piloted.</td>
<td><strong>Promote skills benefits.</strong></td>
</tr>
<tr>
<td><strong>Academy training needs analysis tool</strong> – developed to provide individual support to sector based employers.</td>
<td><strong>Improve Active Analyser to meet sector needs.</strong></td>
</tr>
<tr>
<td><strong>Produced a ‘Sector Offer’ for employers and stakeholders wishing to engage with SkillsActive</strong></td>
<td><strong>Develop an integrated model of investment in skills development, shared between government, employers and individuals.</strong></td>
</tr>
<tr>
<td><strong>Lead the work of the employer-led SkillsActive Wales Executive Committee</strong> and ensured that the views of Wales are represented on UK-wide fora.</td>
<td><strong>Engage with the Welsh Assembly Government’s workforce development programme and the nominated HRD advisors</strong></td>
</tr>
<tr>
<td><strong>Shaped and influenced policy direction across Wales on behalf of sector employers to ensure that SkillsActive is recognised as the authoritative voice on skills and workforce development.</strong></td>
<td><strong>Develop an integrated model of investment in skills development, shared between government, employers and individuals.</strong></td>
</tr>
<tr>
<td><strong>Organised a range of conferences and events</strong> for employers, training providers and partners to help address a shared agenda.</td>
<td><strong>Engage with the Welsh Assembly Government’s workforce development programme and the nominated HRD advisors</strong></td>
</tr>
<tr>
<td><strong>Produced a Welsh specific guide to workforce development planning.</strong></td>
<td><strong>Develop an integrated model of investment in skills development, shared between government, employers and individuals.</strong></td>
</tr>
<tr>
<td>Funded by the Welsh Assembly Government, worked in partnership with Skills for Health in the <strong>production of a workforce development plan to underpin the delivery of key government strategies.</strong></td>
<td><strong>Engage with the Welsh Assembly Government’s workforce development programme and the nominated HRD advisors</strong></td>
</tr>
</tbody>
</table>
7. ANNEXES

SkillsActive footprint using SIC (2003) and SOC codes

Table 8.1 a): Definition of the SkillsActive sector – SIC 2003

<table>
<thead>
<tr>
<th>Sub Sector</th>
<th>SIC 2003 Code</th>
<th>SIC Description</th>
<th>Share of SIC code (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Outdoors</td>
<td>9272</td>
<td>Other recreational activities</td>
<td>13</td>
</tr>
<tr>
<td></td>
<td>5521</td>
<td>Youth hostels and mountain refuges</td>
<td>75</td>
</tr>
<tr>
<td></td>
<td>9262</td>
<td>Other sporting activities</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>9261</td>
<td>Operation of sports arenas and stadia</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>5523</td>
<td>Other provision of lodgings n.e.c.</td>
<td>6</td>
</tr>
<tr>
<td></td>
<td>8042</td>
<td>Adult and other education n.e.c.</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>7122</td>
<td>Renting of water transport equipment</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>2932</td>
<td>Manufacture of other agricultural and forestry machinery</td>
<td>3</td>
</tr>
<tr>
<td>Caravans</td>
<td>3420</td>
<td>Manufacture of bodies of motor vehicles</td>
<td>21</td>
</tr>
<tr>
<td></td>
<td>5010</td>
<td>Sale of motor vehicles</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>5521</td>
<td>Youth hostels and mountain refuges</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td>5522</td>
<td>Camping sites including caravans sites</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td>5523</td>
<td>Other provision of lodgings n.e.c.</td>
<td>9</td>
</tr>
<tr>
<td>Sport and recreation</td>
<td>9261</td>
<td>Operation of sports arenas and stadia</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td>9262</td>
<td>Other sporting activities</td>
<td>89</td>
</tr>
<tr>
<td></td>
<td>9133</td>
<td>Activities of other membership organisations</td>
<td>17</td>
</tr>
<tr>
<td></td>
<td>9272</td>
<td>Other recreational activities n.e.c.</td>
<td>26</td>
</tr>
<tr>
<td></td>
<td>9304</td>
<td>Physical well-being activities</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>0142</td>
<td>Animal husbandry service activities (exc. veterinary activities)</td>
<td>9</td>
</tr>
<tr>
<td></td>
<td>8021</td>
<td>General secondary education</td>
<td>4</td>
</tr>
<tr>
<td>Playwork</td>
<td>8010</td>
<td>Primary education</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>8532</td>
<td>Social work without accommodation</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>9133</td>
<td>Activities of other membership organisations</td>
<td>5</td>
</tr>
<tr>
<td>Health and Fitness</td>
<td>9304</td>
<td>Physical well-being activities</td>
<td>55</td>
</tr>
<tr>
<td></td>
<td>9261</td>
<td>Operation of sports arenas and stadia</td>
<td>13</td>
</tr>
<tr>
<td></td>
<td>9262</td>
<td>Other sporting activities</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>9272</td>
<td>Other recreational activities n.e.c.</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>8042</td>
<td>Adult and other education n.e.c.</td>
<td>1</td>
</tr>
</tbody>
</table>

Occupations used in SIC / SOC matrix

<table>
<thead>
<tr>
<th>SOC Code</th>
<th>SOC Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1225</td>
<td>Leisure and sports managers</td>
</tr>
<tr>
<td>3441</td>
<td>Sports players</td>
</tr>
<tr>
<td>3442</td>
<td>Sports coaches, instructors &amp; officials</td>
</tr>
<tr>
<td>3443</td>
<td>Fitness instructors</td>
</tr>
<tr>
<td>3449</td>
<td>Sports and fitness occupations nec.</td>
</tr>
<tr>
<td>6123</td>
<td>Playgroup leaders and assistants</td>
</tr>
<tr>
<td>6211</td>
<td>Sports and leisure assistants</td>
</tr>
</tbody>
</table>
**SkillsActive footprint using SIC 2007**

<table>
<thead>
<tr>
<th>GROUP</th>
<th>CLASS</th>
<th>SUBCLASS</th>
</tr>
</thead>
<tbody>
<tr>
<td>32.3</td>
<td>Manufacture of sports goods</td>
<td></td>
</tr>
<tr>
<td>32.30</td>
<td>Manufacture of sports goods</td>
<td></td>
</tr>
<tr>
<td>29.20/3</td>
<td>Manufacture of caravans</td>
<td></td>
</tr>
<tr>
<td>55.3</td>
<td>Camping grounds, recreational vehicle parks and trailer parks</td>
<td></td>
</tr>
<tr>
<td>55.30</td>
<td>Camping grounds, recreational vehicle parks and trailer parks</td>
<td></td>
</tr>
<tr>
<td>55.20/1</td>
<td>Holiday centres and villages</td>
<td></td>
</tr>
<tr>
<td>77.21</td>
<td>Renting and leasing of recreational and sports goods</td>
<td></td>
</tr>
<tr>
<td>85.51</td>
<td>Sports and recreation education</td>
<td></td>
</tr>
<tr>
<td>93.1</td>
<td>Sports activities</td>
<td></td>
</tr>
<tr>
<td>93.11</td>
<td>Operation of sports facilities</td>
<td></td>
</tr>
<tr>
<td>93.12</td>
<td>Activities of sports clubs</td>
<td></td>
</tr>
<tr>
<td>93.13</td>
<td>Fitness facilities</td>
<td></td>
</tr>
<tr>
<td>93.19</td>
<td>Other sports activities</td>
<td></td>
</tr>
<tr>
<td>93.19/1</td>
<td>Activities of racehorse owners</td>
<td></td>
</tr>
<tr>
<td>93.19/9</td>
<td>Other sports activities (not including activities of racehorse owners) n.e.c</td>
<td></td>
</tr>
<tr>
<td>93.29</td>
<td>Other amusement and recreation activities</td>
<td></td>
</tr>
<tr>
<td>96.02</td>
<td>Hairdressing and other beauty treatment</td>
<td></td>
</tr>
<tr>
<td>96.04</td>
<td>Physical well-being activities</td>
<td></td>
</tr>
</tbody>
</table>
1. Adult Participation in Sport, 2009 Update (based on 2005 data)
2. Analysis of Higher Education Data (2007), SkillsActive, January 2010
7. Economics of the Park Homes Industry Report, ODPM, 2001
11. Investing in Skills: Sector priorities funding, fees policy and financial support for learners, Consultation, Welsh Assembly Government, October 2009
   (SkillsActive/Sport England)
14. One Wales: A progressive agenda for the government of Wales, June 2007 — A four year programme for government, which sets out an agenda to improve the quality of life of people in Welsh communities.
16. REPs occupational research, SkillsActive 2008
17. SkillsActive SSA Caravan Industry Workshops in Wales 2005
19. Sports Coaching in the UK 2, sports coach UK 2006
21. SSA Visioning Workshops with the Fitness sector, 2005
22. SSA Visioning Workshops with the Sport sector, 2005
26. The Future of Active leisure, learning and well-being in Wales, Experian business Strategies, 2005
27. The Outdoor Census, SkillsActive, 2009
32. Wales Visitor Survey 2006, prepared by TNS Travel and Tourism, November 2009
34. World Class Customer Service…for 2012 and Beyond, SSC Cluster Group, December 2008