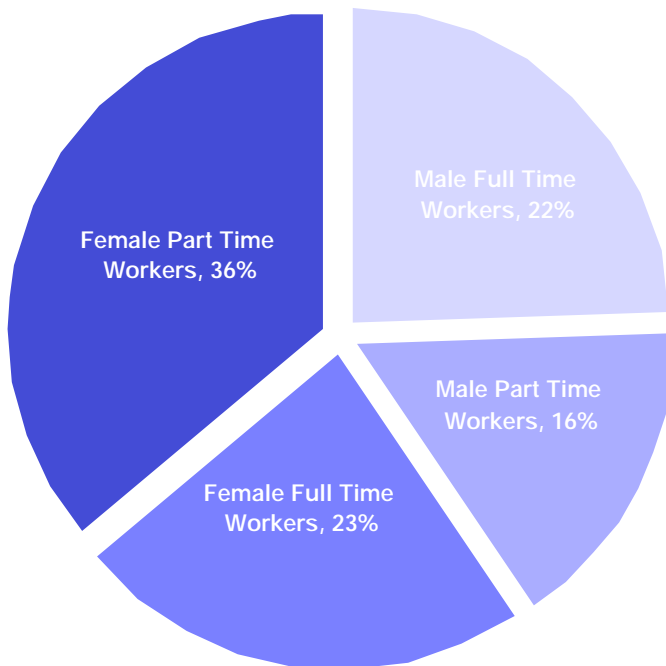


Active Leisure and Learning in the South East

How many jobs in the Sector?

South East distribution of employment in the sector

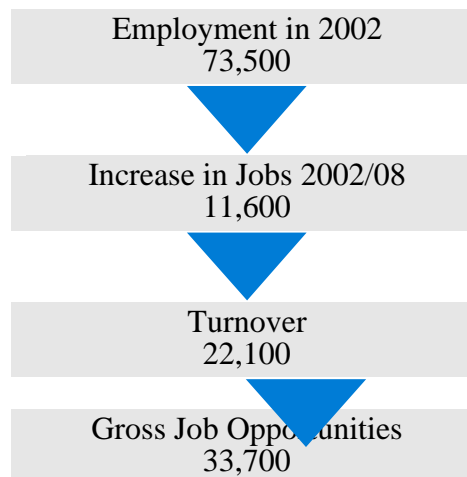


- Around 68,100 people are employed in the sports and active leisure sector in the South East in 2002, with a further 5,400 people self-employed
- 1.9% of the regional workforce is employed in the sector, a proportion slightly higher than the national figure for the sector
- 16.0% of all sports and active leisure jobs in the UK are in the South East, the biggest proportion of any UK region
- 59.4% of the workforce are women
- 52.2% of the workforce are part-time
- Besides the paid workforce, there is an estimated 947,800 who work on an informal voluntary basis including 327,700 people performing core formal voluntary roles.

Source: ABI 2002 (excludes self-employed)

Job opportunities in the sector

- The Annual Business Inquiry shows that between 1998-2002 employment in the sector increased by over 14,700 jobs
- In 1998 Skills Foresight data for England suggested a 2.5% annual growth in employment in the sector over the next ten years, however the South East has exceeded this forecast in the four year period up to 2002 with an average growth rate of 6.3% per year
- Besides this considerable expansion, there is also expected to be a relatively high staff turnover rate. Up to 2008, 30% of current jobs will need to be filled because of replacement demand, a figure equivalent to 22,100 jobs



National Foresight data for the sector suggests that:

- Female employment will experience a slightly greater increase than male employment
- There is expected to be a higher growth in part-time employment
- The rate of growth in the level of self-employment will be modest compared to the growth in the number of employees

Businesses in the Sector

- There are approximately 4,900 sports and active leisure business units in the South East
- A lower proportion of businesses in the sector (75%) are micro-businesses (employing up to 10 people), compared to 85% across all sectors in the region

- There is a higher proportion of small businesses employing 11-24 people (11%) than in the South East economy as a whole (8%)
- There are relatively few large businesses with over 200 employees
- A high proportion of people in the sector work in businesses employing 25-49 people (22% compared to an average of 13% in the region)
- The South East has the biggest proportion of sector employees in large sized businesses, higher than any other region but still a lower rate than the South East economy as a whole

Source: Annual Business Inquiry

Key companies in the sector

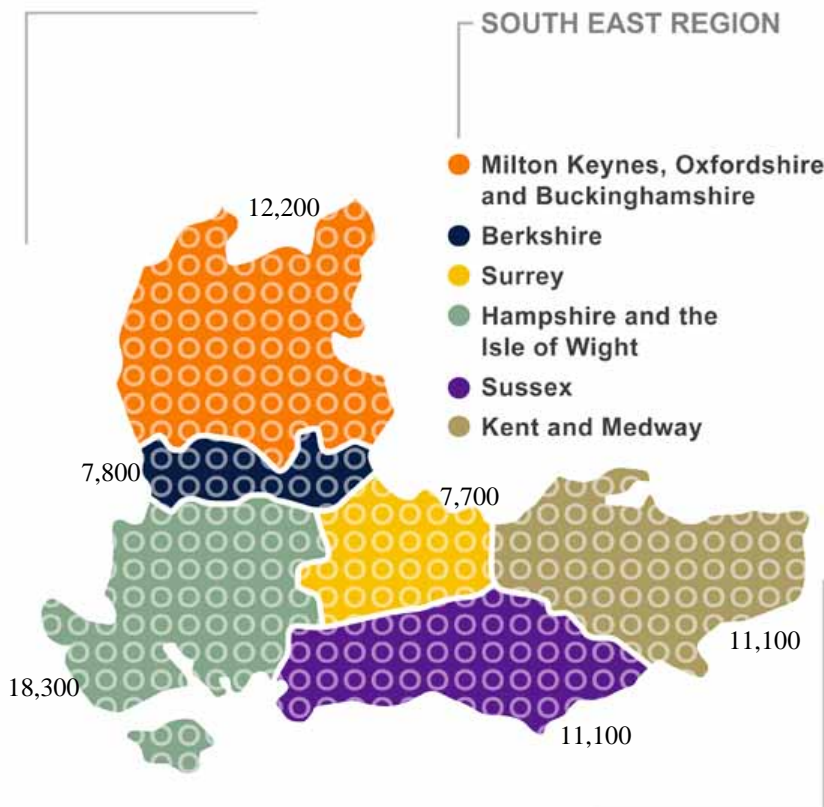
There are many well-known large companies operating in the sector. In professional sport, Southampton and Portsmouth are in the Premiership. Surrey, Sussex, Kent and Hampshire host County Cricket Clubs. Four Formula 1 motor racing teams are based in the region. Sports such as golf (Wentworth and Sandwich hosts this year's Open championship), horse racing (including the Derby at Epsom, Ascot and Goodwood) and motor sports (at Brands Hatch, Goodwood and Thruxton) are responsible for attracting visitors and spending in the region. The region also has a number of stadia and facilities; the Majedski at Reading has hosted international football and major rugby union and St. Mary's at Southampton has been used for international football. The region is also a major centre for rowing (Henley), hockey (Milton Keynes), sailing (Cowes and the Hamble), windsurfing (Brighton) and equestrianism (Hickstead). Much employment in sport and fitness is local authority based, but private clubs are an increasing source of employment opportunities. There are a number of major theme and leisure parks in the region including Chessington, Legoland and Gullivers Land.

Major developments in the sector

The following major developments will affect employment in the Active Leisure and Learning Sector:

- Two of the nine UK Sports Institutes are based in the region at Bisham Abbey and Bisley.
- Over £160 million has been invested in sports facilities in the last 7 years, and over £4.5 million has been invested in revenue grants to 1200 clubs and schools through the *Awards for All* programme. Good quality design is a requirement of all the projects that the Sports Lottery Fund supports.

Employment in the Active Leisure and Learning Sector in the sub-regions



- As the map shows, regionally Hampshire & Isle of Wight and Surrey employ the most people in sports and active leisure. Employment in this sector as a percentage of total employment is highest in Surrey (2.4%)

- Hampshire & Isle of Wight and Milton Keynes, Oxon & Bucks have the highest number of sports and active leisure businesses

- Businesses in this sector make up 1.4% of businesses in the region with the highest proportion in Berkshire (1.6%)

Skills and recruitment issues in the sector

The 2003 National Employer Skills Survey was commissioned by the Learning and Skills Council, in partnership with the Sector Skills Development Agency (SSDA) and the Department for Education and Skills, in order to provide detailed information about the extent, causes and implications of England's recruitment problems and skill gaps. It also measures employers' training activities.

In Skills Actives sector, 28% of South East businesses expect employment to increase in the next 12 months compared to 30% nationally. Only 3% of businesses are expecting employment to decrease in the period in the region.

Employers were asked their views on the levels of skills required to do each job. Across all occupations nationally in the sector, the skills most required at advanced and high levels are customer handling skills (27% of employers say this is required at an advanced level, 46% at a high level), communication skills (24% advanced, 48% high) and team working (20% advanced, 49% high). Notable is the low level of IT skills required.

19% of establishments had vacancies at the time of the survey. In employment terms vacancies form 2.7% of employment in the region. 43% of establishments in the region with vacancies are finding at least one position hard to fill, equivalent to 8% of all establishments.

Nationally the skills establishments found difficult to obtain from applicants are Communication skills (40% of establishments with a hard to fill vacancy), Team working skills (38%), Customer handling skills (33%), Technical and practical skills (28%) and Problem solving skills (27%).

Comparing employers within the SkillsActive SSC area with employers across England, the main difference is that they are more likely to state that the hard-to-fill vacancy is caused by aspects of the job: poor terms and conditions (39 per cent compared to 21 per cent) and shift work (30 per cent compared to 15 per cent). They are less likely to give reasons associated with the number of applicants or their skills or experience. Because of this the proportion of hard-to-fill vacancies in the SkillsActive SSC area that are skill shortage vacancies is lower (at 35 per cent) than for England as a whole (50 per cent).

The implications of hard to fill vacancies are an increased workload for other staff (93% of establishments report this), difficulties meeting customer service objectives (48%), difficulties meeting required quality standards (47%) and difficulties introducing new working practices (39%).

It is estimated that 24 per cent of establishments in the SkillsActive SSC area suffered from internal skills gaps, higher than the 22 per cent reported for England as a whole. This data suggests that some 13 per cent of employment in the sector are not fully proficient at their current jobs. In the South East a lower

proportion of establishments are reporting skills gaps (20%) and this equates to 11% of their staff in the region.

It is evident from this that the volume of skill gaps far exceeds that of recruitment problems, as in other sectors and across England. This would suggest that there is a need for sufficient emphasis on workforce development to address these gaps as well as looking at skill supply and the quality of entrants into the sector. In the South East the skills that need to be improved were reported as Customer handling skills (65% of establishments with a skill gap), Communication skills (52%) and Team working skills (48%).

Pay and conditions in the sector

- The average annual salary for full-time Leisure and sports managers was £26,300 in 2003
- Sports coaches, instructors and officials earn an average of £24,800 per annum
- Fitness instructors and Sports and leisure assistants both earn around £15,000 nationally

Source: New Earnings Survey 2003

Provision available

- SkillsActive in partnership with employers and key organisations across the Sector has developed a framework for Apprenticeships. The mandatory outcomes for completion lead to either a Level 2 or Level 3 S/NVQ; some Key Skills awards; a Technical Certificate; and other industry-relevant skills. The occupational strands cover Coaching, Teaching and Instructing (a sport or activity), Instructing Health and Fitness, Activity Leadership and the Outdoors, Spectator Control, Operational Services and Operations and Development, and Playwork.
- There are a wide range of Further Education college-based courses in areas such as sport science, fitness instruction as well as general courses in Active Leisure and learning.
- There are a wide range of FE college-based courses in areas such as sport science, fitness instruction as well as general courses in sport and active leisure.
- There are currently five Centres of Vocational Excellence in sport related subjects established or in development in England. None of them are based in the South East.
- Higher-level qualifications are available at graduate and postgraduate level. These include degrees in areas such as physical education, sports development, sport science & physiology, and sport and recreation management. Providers include:
 - Brighton University where HND, BA, BSc and postgraduate courses are available in subjects such as sport science, exercise science, sport technology and sport management.
 - Buckinghamshire Chiltern University College where BA courses are available in subjects such as sport industry management, leisure management and sport studies.
 - Canterbury Christchurch University College where foundation degrees in physical activity and health and early years are available. Also available is a BSc in sport & exercise science.
 - University College Chichester where BA and BSc courses are available in subjects such as sport & exercise science, sports development, coaching science and exercise & health science. An MSc in sport & exercise science is also available.
 - University of Kent where a wide range of BScs are available in sports health and fitness.
 - King Alfred's Winchester where DipHE and BA courses are available in subjects such as sport studies and sports development.
 - Oxford Brookes University BA and BSc courses in sport and coaching studies are available.
 - Portsmouth University where BSc degrees in sports development, sport science and sport facilities design are available.
 - Reading University where a BA in sports leadership is available.
 - Southampton University where undergraduate courses in sport studies and sport management & leadership are available.

Useful contacts and links

Sport England South East, web: www.sportengland.org

SEEDA, web: www.seeda.co.uk

Culture South East, web: www.culturesoutheast.org.uk

Sussex Sports Partnership, web: www.sussexsport.org

Hampshire Sports Partnership, web: www.hants.gov.uk/activesports

Kent Sports Partnership, web: <http://www.kentsport.org>

Surrey Sports Partnership, web: www.activesurrey.com

Berkshire Sports Partnership, web: www.berkshiresport.com

Milton Keynes and Buckinghamshire Sports Partnership, web: www.activesportsbucks.co.uk

Oxfordshire Sports Partnership, web: <http://www.oxonactivesports.co.uk>

South East England Intelligence Network, web: www.see-in.co.uk

Sussex LSC, web: www.lsc.gov.uk

Hampshire and Isle of Wight LSC, web: www.lsc.gov.uk

Kent and Medway LSC, web: www.lsc.gov.uk

Surrey LSC, web: www.lsc.gov.uk

Berkshire LSC, tel: web: www.lsc.gov.uk

Milton Keynes, Oxfordshire and Buckinghamshire LSC, web: www.lsc.gov.uk

Other factsheets in the series

SPR01 – West Midlands

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SPR03 – Yorkshire & the Humber

SPR07 – North East

SPR11 – Northern Ireland

SPR04 – South West

SPR08 – Eastern England

SPR12 – Scotland

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