

SSA EXECUTIVE SUMMARY: LONDON

SkillsActive is the Sector Skills Council for Active Leisure and Learning, which encompasses the following sub-sectors:

- Sport and Recreation
- Playwork
- Health and Fitness
- The Outdoors
- The Caravan industry

Key Statistics ¹	SkillsActive (Region)
Sector Profile	
Total size of paid workforce	59,100
% of sector employment in England	12%
% of total employment in London	1%
Total number of establishments	3,200
% of micro businesses (1-10 people)	69%
Largest sub-sector is Sport and Rec	62%
Playwork is 2nd largest	26%
Workforce Profile	
Self employed	10%
Part-time workers	43%
Male Employees	40%
Female Employees	60%
Workforce aged 16-24	16%
Workforce aged 45+	33%
Workforce of minority ethnic origin	20%
Qualifications, Recruitment & Skill Needs ²	
Workforce not qualified to L2	32%
Workforce qualified to L4+	31%
% of employers with a vacancy	58%
% employers reporting the vacancy was hard-to-fill	38%
% of hard to fill vacancies attributed to skills shortages (lack of skills, qualifications or experience)	74%
Skills shortage vacancies as % of all	16%
% of employers reporting a skills gap	39%
Forecast Growth (2004-2009) ³	
Average annual growth in Output*	3.8%
Paid employment growth by 2014	29%
Forecast employment in 2014	74,400
Average annual growth in employment (last 5 yrs)	4%
Average annual growth in employment (next 5 yrs)	2%
Additional jobs created by 2014	113,200

* Note: 2004 to 2009, Please note all forecasts are pre-Olympic Games forecasts

Regional Economic Development Strategy

The Mayor's vision for London is to "create a sustainable world city based on strong, long term economic

growth, social inclusion and environmental improvement"⁴. There are 3 key themes identified in the strategy (economy, equality and environment) Active Leisure and Learning will have a clear role to play in achieving the vision.

With regard to the skills agenda, in July 2006 the Government announced plans to further devolve responsibilities to the Mayor and the London Assembly.

London is home to a number of high profile sporting clubs, venues and facilities. There are a number of professional football clubs (e.g. Arsenal, Tottenham Hotspurs, Chelsea, West Ham, and Crystal Palace) and premier rugby union clubs (e.g. Wasps and the Harlequins). Both Middlesex and Surrey host County Cricket clubs in the region.

The region also hosts a variety of sporting events such as the London Marathon, the Ashes and Wimbledon and one-off events (e.g. boxing and athletics). In addition, London has over 540 sports arena and stadium and 1,500 workplaces for sport and physical well being. Wembley Stadium, Arena and Conference Centre and the Docklands Arena host a variety of major events. Wembley is also currently undergoing major redevelopment.

There are a number of English Institute of Sport Centres, including St Mary's College, Twickenham, Sutton Indoor Arena, Crystal Palace and the new River Stadium in Haringey.

The London 2012 Olympics and Paralympic Games highlight the continuing investment in sports facilities and programmes. Plans include building 6 new sport stadia (e.g. Athletics Stadium, Aqua Centre, Velodrome, Indoor Sports Arena, Hockey Centre and Canoe Slalom) and 4 additional arenas.

Sector Skills Agreements

Sector Skills Agreements (SSA) bring together employers, providers and funders of education and training with the key purpose of developing a more demand-led system of public investment in skills for the sector, combined with an increase in employer commitment to workforce development:

1. Provide a means for employers and government to collaborate in meeting the priority skills needs of sectors
2. Present a unique opportunity for employers to shape training provision and coherent progression routes
3. Challenge employers to work collaboratively
4. Give individuals access to training which is relevant to industry needs and to help secure well paid employment and progression

We have undertaken extensive research including desk-top reviews of existing information, conducting research and consultation with key sector employers

through focus groups, questionnaires and face to face meetings.

Our Skills Needs Assessment, Assessment of Current Provision and Analysis of Gaps and Weaknesses reports provide the fullest picture and are available on www.skillsactive.com.

The Sector Skills Agreement: Regional Action Plan for London incorporates the findings from Stages One to Three of the SSA process and sets out a plan for development for the Active Leisure and Learning sector in the region.

Value of our sector

- The SkillsActive sector contributed £1.17bn in output to the London economy in 2004 – more than twice the average annual growth rate of the whole London economy over the last 5 years
- GVA for the sector is forecast to grow by 48% to £1.73bn over the next decade, at an average annual rate of 3.8%.
- The average rate of employment growth has been three times greater than the London economy as a whole over the past 5 years (1999-2004)
- Growth in employment is expected to continue above the regional average over the next 10 years

Profile of our workforce

See Key statistics

- Volunteers are important to the sector and are concentrated in key occupations such as coaches, teachers, instructors and activity leaders and operational staff.
- Around 43% of the paid workforce work part-time, compared with just 17% across all industries in the region.
- 10% of the workforce is self employed. The Caravan and Health and Fitness sub-sectors show the highest levels of self employment (17% and 12% respectively).
- 60% of the sector is female. Proportions of female employment are particularly high within the Playwork sub-sector (80%) and lower than average in the Caravan industry (34%).
- Around 16% of the workforce is under the age of 25.
- Around 20% of the workforce is of non-White ethnic heritage; however, this is lower than the proportion found across all industries in the region (27%).
- More than three in ten (32%) of the workforce is not qualified to level 2, higher than the whole regional economy.

Sports, Fitness and the Outdoors

- Sport generates £4.7bn in annual turnover and £1.6bn in annual value-added
- Approximately 683,000 people participate in organised sports clubs

- Residents spend £1.8bn annually on sports-related goods and services
- **327 private health clubs in the region** (19% of England) with a further 171 planned⁵
- **336 public sports centres** (11% of England) with a further 96 sports centres planned.

Recruitment Difficulties & Skills Gaps

- Recruitment difficulties are more common within the sector regionally than nationally.
- 58% of 'establishments' have had vacancies in the last 12 months, compared with 51% across the sector nationally.
- 38% of organisations in the region with vacancies found them hard to fill.
- The most common skills that are lacking or in need of improvement are management, communication and project management.

The Caravan Industry Stats	London
Number of caravan parks	12
% of total number of parks in England	<1%
Holiday pitches	0
Number of Households in Park homes	245
% of residential caravans in England	1%

- **The Caravan industry** has enjoyed great success in recent years, with manufacturing sales up 50%
- 40% of Caravan Parks reported a vacancy in the last 12 months, of which 57% found them hard to fill.
- A major challenge is recruiting enough cleaners and housekeepers, followed by bar managers/staff, receptionists, wardens, cooks and chefs.
- The three most important skills were Customer service, maintaining safety and communication.

Training Provision

- The median spend on training is £1,000 to £4,999. Trained staff attended an average of 10 days training, compared with a national average of 11 days.
- Management staff are the most likely to receive training.
- 16,974 people participated in LSC funded learning on sports related learning programmes.
- London Central LSC area appears to dominate enrolments (43%), whilst London North and London West record the lowest levels.
- Total funding for sport related study in London was approximately £13.23m– 11% of the all-England funding for the sector (estimated to be £121.7m).
- There is currently no specific work-based learning for the Caravan sector in the region.
- There are 3 awarding bodies currently offering Playwork qualifications in London: CACHE, City and Guilds and Edexcel.
- London also has access to HE courses in Playwork at Foundation and Degree Level at the University of East London.

Playwork

The widely accepted definition is: *Play is freely chosen, personally directed, intrinsically motivated behaviour that actively engages the child or young person.*

- Playwork has a higher proportion of female and part-time workers. Seasonal workers and those working on holiday play schemes are also common.
- Holiday play schemes attract younger and more male playworkers within the seasonal workforce.

Skills needs

Specific issues for the Playwork sector across the UK include:

- More Playwork specific skills and qualifications.
- Greater understanding of the values and principles of playwork.
- Greater business and management skills: specifically leadership, partnership working, marketing and fundraising.
- Higher level qualifications e.g. foundation degrees for senior practitioners
- More staff trained to level 2 and 3.
- More Playwork training and quality work experience for trainers and assessors.

Key Challenges in the Employers' View

Drivers of Change

- **Changing consumer trends** (e.g. move towards extreme sports and personal trainers).
- **Increased competition** e.g. consumer drive for high quality services at competitive rates.
- **Technology** – e.g. impact on the efficiency and growth of businesses within the sector.
- **Changing Government legislation** will continue to impact, particularly the voluntary and community sector.
- **Increased litigation** and the cost of ensuring that staff receive child protection training and police checks are carried out.

Key Challenges

Funding

- Funding streams are confusing
- Concern as to the availability of funding (e.g. mainstream funding for workers over 25) and the rigid criteria for applying for funding.

Recruitment and retention

- Perception that sport and recreation is a 'secondary career choice'.
- The profile and image of the sector needs to become more positive but remain realistic.
- Low pay is a significant barrier
- Career progression is not always clear
- Lack of easy and accessible information regarding careers
- Perception that work placements are not always truly reflective of the real tasks that individuals will need to undertake.

The skills challenge

- Staff need to be multi-skilled to meet shifting consumer demands and expectations.
- Lack of management and leadership skills
- Job readiness of graduates – need for greater industry focus.
- Need to improve communication and customer care skills – but recognise the cost implications for employers.
- There is an increasing demand for community focussed skills, particularly in working with hard to reach groups.
- Concern that mandatory skills are not funded by the LSC

Training supply

- Courses are supply led and not demand led - need for FE and HE to work more closely with employers.
- There is a need to rationalise the range of qualifications available to the sector
- There is a need for greater flexibility and accessibility in training - particularly for the voluntary sector.
- Concern regarding 'staff replacement costs'
- Funding is primarily available for 16-25 year olds
- There is a need for a case study approach to engagement

Key Priorities

As part of the SSA process SkillsActive have developed a number of key solutions to tackle the issues and challenges facing the Active Leisure and Learning industry, grouped into 6 key themes (below).

As this agreement is on behalf of the employers in our sector, their actions, which complement those of our stakeholders, have been included in this Sector Skills Agreement.

Six Priorities for Action

1. Improve the quality and range of services
2. Improve recruitment and retention
3. Professionalise and up-skill the existing workforce
4. Match training supply to employer demand
5. Source funding for training
6. Increase sector investment in our people

Sources:

- ¹ SkillsActive – SSA Stage 1 - Skills Needs Assessment
- ² SkillsActive SFO Survey and NESS 2005
- ³ The Future of Active leisure and Learning, Experian Business Strategies, 2005
- ⁴ Mayor's Vision for London, Economic Development Strategy
- ⁵ FIA Leisure Database Company

REGION SSA ACTION PLAN SUMMARY

1. To improve the quality and range of services

- 1.1 Meet the skills challenge of the 2012 Olympic and Paralympic Games – e.g. mapping skills and training opportunities for the voluntary and paid workforce, supporting the development of programmes for volunteers and young people from the NEET group.
- 1.2 Increase the uptake of business support schemes in the region – e.g. engagement in management and leadership training and Train2Gain.
- 1.3 Provide data to influence regional policy and improve sector recognition e.g. ensuring LMI is fed to the London Employers and Skills Board and stakeholders and that new data captured from training needs analysis' is fully utilised.

2. To improve recruitment and retention

- 2.1 Encourage improvements to pay and conditions in the sector, promoting - e.g. CDP for paid and unpaid staff, developing the use of Skills Passports and encouraging the use of registers for professionally qualified workers.
- 2.2 Promote the wide range of career opportunities within the active leisure and learning sector – e.g. training IAG advisors, ensuring greater publicity of the sector through key events and promotion of careers information.
- 2.3 Establish employment pathways into the sector – e.g. encouraging more employers to offer work placements, developing mentoring support to young people and identifying and supporting the needs of diverse and under-represented groups.

3. To professionalise and up-skill the existing workforce

- 3.1 Develop and extend registers of professional competence – i.e. developing a conversion programme for REPs.
- 3.2 Improve the Percentage of Coaches with a Qualification – e.g. increasing the number of community sports qualifications and the number of female, disabled and BAME coaches
- 3.3 Upskill the Existing Workforce – e.g. promoting the upskilling of stewards and individuals working in facilities, venue and events management and establishing 'train the trainers' programme.

4. To match supply to demand

- 4.1 Establish National Skills Academy for our sector in London, working with employers to deliver, develop new hubs (e.g. leisure operations, coaching and health and physical activity) and encourage dialogue between training suppliers and employers.
- 4.2 Ensure training and learning being provided to the sector is up-to-date and industry relevant – e.g. develop programmes for trainers/tutors to update knowledge, establish pan-London training provider network, increase the number of apprenticeship schemes in the region and develop the employability skills of graduates.

5. To re-direct funding

- 5.1 Identify appropriate funding sources to support training needs and qualification attainment across the sector
- 5.2 Increase investment into vocational training with a particular focus on work based learning

6. To increase sector investment in our people

- 6.1 Increase employer demand for, and investment in, skills within the workforce
- 6.2 Encourage employers to undertake regular and informed training needs analysis and WFD in the workplace – e.g. promote the SkillsActive CD Rom on best practice.
- 6.3 Monitor and review the impact of investment in skills by employers

REGION SSA ACTION PLAN SUMMARY - PLAYWORK

1. To improve the quality and range of services

- 1.1 Better recognition of the value of playwork through promoting playwork values, skills, knowledge and principles to other allied professional sectors, promoting public play and playwork events such as Playday and Play Awards, ensuring Children and Young People's Workforce Strategies include playwork, making playwork practice and principles accessible for people who want to incorporate their own practice; exporting playwork principles wherever possible and working to gain recognition of the benefits of playwork as an integral need of children and the additional benefits of delivery (e.g. impact on crime).
- 1.2 Constant drive to meet Government agendas and customer expectations through promoting the importance of including playwork in inter-agency groupings and increasing the recognition of playwork within Government policies and agendas.
- 1.3 Work towards sustainable funding for play provision and holiday play schemes.

2. To improve recruitment and retention

- 2.1 A programme of improved careers advice / guidance to increase the pool of playwork applicants by promoting playwork as a positive, viable and professional career and promoting the value of play, playwork, qualifications and training through networks and information dissemination.
- 2.2 Explore improvements to pay and conditions for playworkers.
- 2.3 Improve employer recognition of and investment in Skills for Life to aid progression.

3. To professionalise and up-skill the existing workforce

- 3.1 Establish a register of playwork professionals.
- 3.2 Up-skill the existing workforce through encouraging recognition that an increasing number of playworkers will need to achieve relevant higher level qualifications that equip them for a variety of new roles, improve the take up of training by BME, disabled and other disadvantaged groups and exploring the development of qualifications for new roles working with children (e.g. play rangers and participation workers).

4. To match supply to demand

- 4.1 A programme to raise the quality of FE training in our sector through supporting the delivery of training for Playwork NVQ assessors and the development of Playwork NVQ assessment centres in the region, supporting the delivery of training for trainers courses, improving the development of playwork within the FE/HE environment and raising the quality of playwork education, training and qualifications.
- 4.2 Improve standardisation and transferability of qualifications by establishing a Register of Playwork Professionals.

5. To re-direct funding (for training)

- 5.1 Reduce barriers to accessing training – more local, flexible, work-based training

6. To increase sector investment in our people

- 6.1 Explore quality work experience for students, tutors and assessors and work at a regional level to promote the take-up and provision of work experience opportunities.
- 6.2 Encourage employers use of workforce development planning tools
- 6.3 Increase training levels in the sector through promoting workforce development, improving recognition of the value of training and qualifications in the play sector, improving the recognition of quality assured training and qualifications with employers and improving the 'learning culture' with playwork employers.
- 6.4 Understanding and utilisation of National Occupational Standards (NOS)
- 6.5 Commitment to fund training included in project contracts

7. Operational or implementation

- 7.1 Strong regional infrastructure for playwork education and training centres.