SkillsActive
More People, Better Skilled, Better Qualified

Sector Skills Assessment

Active Leisure, Learning and Well-being SCOTLAND

Prepared by SkillsActive

February 2010

STRUCTURE AND CONTENTS OF THE REPORT

EXECUTIVE SUMMARY

Introduction and background

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 Scottish economy through successful leisure and tourism, to the health of the nation and to social equality through community sport and play initiatives.

This is the Sector Skills Assessment for Scotland. It 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 SkillsActive industry and workforce

The Active leisure, learning and well-being sector in Scotland had a gross value added output equalling £0.8 billion in 2004. It created 9.2% of the total UK active leisure, learning and well-being output, and accounted for 1 per cent of the whole Scottish economy output.

A total of 58,200 people are employed in 4,200 workplaces in the sector in Scotland in 2008 and represents 2.2 per cent of total Scotland employment. Active leisure, learning and well-being employment is particularly concentrated in sport and recreation (63 per cent) and playwork (21 per cent).

The distribution of qualification levels held by the active leisure, learning and well-being workforce in Scotland closely follows the average for the whole Scotland economy. Relatively, playwork is the most well qualified sector but this may not be in a sector specific qualification.

Compared with Scotland's working population as a whole, active leisure, learning and well-being employees are more likely than average to be women, in their thirties or younger and more likely to be part-time. However, the large female playwork workforce skews this figure and sport and recreation have a higher male content. In 2008, the active leisure, learning and well-being workforce had 44 per cent full-time and 45 per cent part-time employees. The self-employed formed 11 per cent of sector employment. Seasonal staff are also important.

Volunteers are a valuable addition to the active leisure, learning and well-being workforce with the Scottish Sports Association and **sport**scotland suggesting there are approximately 146,000 volunteers in Scottish sport alone. Approximately 70 per cent of the 64,000 coaching workforce in Scotland are voluntary. In addition, there are a number of paid employees who work in the voluntary sector.

Key drivers of business competitiveness

The range of SkillsActive sub-sectors are subject to different forces and the current performance of each varies. The primary drivers of business competitiveness are consumer trends, government policy, legislation and funding. There are also some secondary drivers of globalisation and technology that also impact on the sector.

Government strategies and policies are driving the participation in sport and physical activity agenda. Notably Reaching Higher, the sport strategy for Scotland and Let's Make Scotland More Active, the physical activity strategy. These recognise the importance of physical activity with a particular focus on getting inactive people active.

The planned **legacy** from the 2014 Commonwealth Games in Glasgow additionally focuses on ensuring the workforce have the right training and skills (including volunteers) and developing the tourism infrastructure.

An increase in **health awareness** and the importance of preventative healthcare to tackle obesity is leading to a rising demand for a range of health and sports services, including outdoor activities, private gyms and health clubs, workplace fitness facilities, mass events such as fun runs and cycling. Although health has improved more work needs to be done to meet long-term government targets.

The **changing social and economic circumstances** of the population are also driving the sector. The tendency for both parents to work in order to support their families or for single parents to work rather than stay at home has increased demand for childcare with knock-on effects for playwork. Customers have increasingly higher standards regarding the quality of leisure-time product or service and the older over 50s market is growing. The sector has to ensure it has the right skills in customer handling, coaching and instructing to meet these changing demands.

Many of the SkillsActive sub-sectors contribute to **tourism**, for example golf, football, cycling, walking and climbing and caravan parks. Attendance at sporting events is a key source of revenue. Appropriate skills are demanded of employees, to ensure that visitors and customers have a high quality experience.

The whole SkillsActive sector is affected by **legislation and regulation** notably in health and safety. Examples include employment legislation, EU Working time Directive, Disability Discrimination Act. Budgets spent on "statutory" training impact on core skills and staff development. In some cases, such as playwork, it is setting recognised standards and can help professionalise the workforce.

The Register of Exercise Professionals has been an important driver in professionalising the health and fitness sector and has already attracted 1,356 members from Scotland.

The sector envisages future opportunities arising from I.T. development in such areas as on-line training for sport and fitness programs, activities to improve children's social skills, management information systems and software programs relating to health analysis, sport and fitness training programs.

Current performance

The active leisure, learning and well-being sector is supported by a range of measures to help ensure that the sector remains competitive. The mix of public, private and voluntary sectors results in a range of investment into the sector through paying customers, raising funds and direct or indirect government grants or funding. Additionally, there is the investment of time from volunteers that is an important element of the sector's success.

The sector benefits from the focus on physical activity and health in the government strategies and policies but is affected by short term funding approaches, competition for Lottery funding and local authority budgets.

The sector positions itself in the market as mainly one of improvement to your well-being either through health, enjoyment or personal development. There is an element of competition within the sector in terms of private / public pull and attracting similar target markets.

The caravans sector is predominantly tourism-based and describes its current performance as "buoyant". This sector and the outdoors appear to have benefited from the 'staycation' market during the current economic climate.

Overall, the sector is attractive to young people. However, applicants are often not prepared for the generally low-skilled, low pay entry-level positions. Recruits require experience and are not coming to employers already equipped with relevant skills so they must first gain that experience. The most frequently cited area lacking in new recruits were "soft" skills, particularly customer service.

Playwork is reporting difficulty recruiting new entrants because of low pay, low skill and shift work plus limited career progression together with significant competition from Early Years and Childcare for qualified staff.

Notable areas of growth are around the health agenda and aim to increase participation in physical activity that cuts across sport and recreation, health and fitness, playwork and the outdoors. Such areas include attracting a wider range of participants including women, children, and hard-to-reach groups and meeting the needs of an ageing population.

Implications for skills demand

Character / composition of current skills needs

The active leisure, learning and well-being sector has a high level of customer interface and this is reflected in the level of importance placed on team working and communication skills that were both identified by 87 per cent of employers as very important. Although all skills were considered of some importance those identified as less important by employers were literacy, numeracy, enterprise and I.T.

Recruitment and skills shortages, gaps

The Scottish Employers Skills Survey (SESS) 2008 found that hard-to-fill vacancies were experienced by one per cent of all employees and was similar to all industries. Fifty-five per cent of employers with vacancies found them hard-to-fill.

The core roles identified as hardest to fill in SkillsActive research were sector specific roles of coaches, instructors, activity leaders and playworkers. These roles also ranked as the most acute job areas that respondents found hardest to fill.

A skills gap was reported by 18 per cent of all organisations according to SESS 2008. This is higher than the 13 per cent identified in 2006 for active leisure, learning and well-being but lower than the 20 per cent experienced by all industries. The most common gaps were in customer handling skills (65 per cent), oral communication skills (54 per cent) and problem solving skills (52 per cent). The main causes were new entrants to the post (74 per cent) and insufficient training and development for staff (50 per cent).

Skill gaps were more likely to have a major impact on the sector than seen across all industries (24 per cent compared to 16 per cent). Historically, the sector is associated with high staff turnover rates and there is a perception that jobs within the sector are low paid with poor working conditions.

Future skills needs

Forecasts before the recession indicated output in the sector was to rise strongly in 2004, and experience steady growth over the next ten years. Between 2009 and 2014, annual output growth was expected to average 1.8 per cent per year, although slightly below the average rate of 2.2 per cent for the whole Scotland economy.

The average annual rate of growth in total employment was forecast to slow, to 1.2 per cent between 2009 and 2014, employment growth in the Scotland active leisure, learning and well-being sector was forecast to continue to significantly outperform the whole Scotland economy, which was to only maintain constant employment levels.

Employers expected an increase in the level of skill required for customer service, basic I.T. and communication skills and also child protection skills. Relative growth in the number of management, associate professional and administrative roles over the ten years to 2014 was forecast.

Forecast replacement demand in the active leisure, learning and well-being sector in Scotland was to average just 8,000 annually. The sport and recreation sector was forecast to constitute the majority of this, creating 70 per cent of total replacement demand.

Priorities

Issues requiring attention by the sector's employers, partners and stakeholders in future.

- Human resources and workforce development issues connected to the targets in the national sport strategy, Reaching Higher, the physical activity strategy and the legacy from the 2014 Commonwealth Games that anticipates an increase in participation in physical activity and sport.
- The health and fitness sub-sector is expected to continue growing due to the focus on preventative healthcare and improving physical activity levels. This is likely to have implications for recruitment and skills.
- Workforce development needs of those responsible for encouraging exercise amongst the inactive and counteracting the increasing problem of our population being overweight and obese.
- The effects on the training and skills expected of playworkers arising from the integrated services approach to children's services. There is a need for a cross-sector approach in conjunction with key partners.
- Consideration to be given to the introduction of professional registers, such as the Register for Exercise Professionals, in other professions within the sector. Some governing bodies of sport have set up coach licensing.
- The task of providing volunteers with an increasingly sophisticated range of skills, whilst retaining the motivation of the volunteers themselves.
- The difficulty in filling vacancies attributed by employers to the generally low-skilled, low pay entry-level positions characteristic of many parts of the sector.
- Skills gaps identified by employers in the sector are mainly in core, or soft skills such as communication and teamwork; the mis-match between supply of recruits with the right training and qualifications and demand from employers.
- The sector's contribution to tourism: skillsets ranging from teamwork and customer care to event management and outdoor leadership are likely to be in increasing demand
- Predicted changes in the ageing profile of the Scottish population impact on the market for the sector's products and services and the skills needed of its employees.

1. INTRODUCTION AND BACKGROUND

1.1. Background

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 UK economy through successful leisure and tourism, to the health of the nation and to social equality through community sport and play initiatives.

Sector Skills Assessments (SSA) are an annual requirement of the UK Commission for Employment and Skills (UKCES) as specified in their Common LMI Framework. They will be used to influence the Strategic Skills processes, to ensure that employers have the right skills to support the success of their business and individuals have the necessary skills to be employable and personally fulfilled.

The main objectives of this Sector Skills Assessment for Scotland are to describe the sector in terms of size, structure and current skill needs, and to examine the impact of external drivers and current performance on future skills priorities for the sector. It draws on a range of government sources and recent research undertaken by SkillsActive and its sector partners[1]. 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.

1.2. Research sources

The Labour Force Survey sample sizes for the sector in Scotland sometimes fall below the advised minimum reporting threshold. This may restrict reporting by sub-sector and in some cases for the whole active leisure, learning and well-being workforce. In such instances the UK figures are presented or data produced by Experian Business Strategies for the Sector Skills Agreement in 2005 is used.

1.3. Structure of the report

The structure of the SSA report reflects the key objectives outlined above:

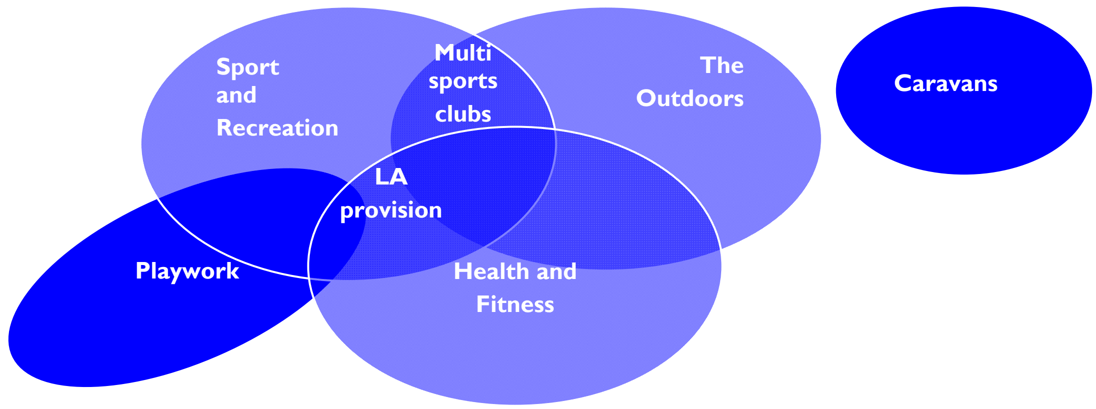
- An overview of the sector and workforce profile, its size and characteristics;
- An examination of **key drivers of business competitiveness;**
- An assessment of the impact of external drivers, the **current performance and competitive position** of the sector, sector strategies for success and sports participation;
- The impact of the **economic climate;**
- An analysis of the extent of **current skill needs, skill shortages and gaps;**
- **Anticipating what lies ahead:** the Golden decade of Sport;
- **Sector priorities** including key strategic issues to be addressed.

[1] See chapter 10 for bibliography and annexes for further information

2. THE SKILLSACTIVE INDUSTRY AND WORKFORCE

2.1. 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 one 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. The main SIC codes used for analysis of the Scottish Employer Skills Survey (SESS) to date have been 55.22, 92.6, 93.04 and 97.72.

2.2. Contribution of the sector

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. There are two ways to measure the size of the sector, which is by using either the value of output or by looking at the numbers employed. We look at both of these aspects below.

2.2.1. Output

The active leisure, learning and well-being sector as a whole had an estimated gross value added (GVA) in Scotland of £0.8 billion in 2004[2], having grown at a higher rate than the whole Scottish economy since 1999. The largest sub-sector within this was sport and recreation[3], producing 61 per cent of the total. The outdoors was the smallest sector, creating £40 million of output.

[2] *The Future for Active Leisure and Learning – Scotland,* Experian Business Strategies, 2005

[3] 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.

The sector accounted for 1.0 per cent of total Scotland output in 2004, which suggests that active leisure, learning and well-being has slightly more importance to the whole economy in Scotland than it does across the UK. Furthermore, sector output in Scotland accounted for nine per cent of total UK active leisure, learning and well-being output, making it the largest contributing nation, after England.

Figure 2.2.1 (a): Output* in active leisure, learning and well-being in Scotland, 2004

	Total (£millions)	Share of Total Active leisure, learning and well-being Sector in Scotland**
Active leisure, learning and well-being	790	-
Sport and recreation	480	60.8 %
Health and fitness	60	7.7%
Playwork	140	18.2%
The outdoors	40	5.6%
Caravans	80	10.2%
Whole economy	75,190	-
Scotland active leisure, learning and well-being output as a percentage of UK active leisure, learning and well-being output		9.2%
Scotland active leisure, learning and well-being output as a percentage of Scotland whole economy output		1.0%

**Measured as Gross Value Added (the net value of output or the value of income earned by individuals and corporations).*
***Due to overlap of sectors, the sum of percentage output from each sector is greater than 100%.*

Source: Experian, August 2005; based on data sourced from National Statistics.

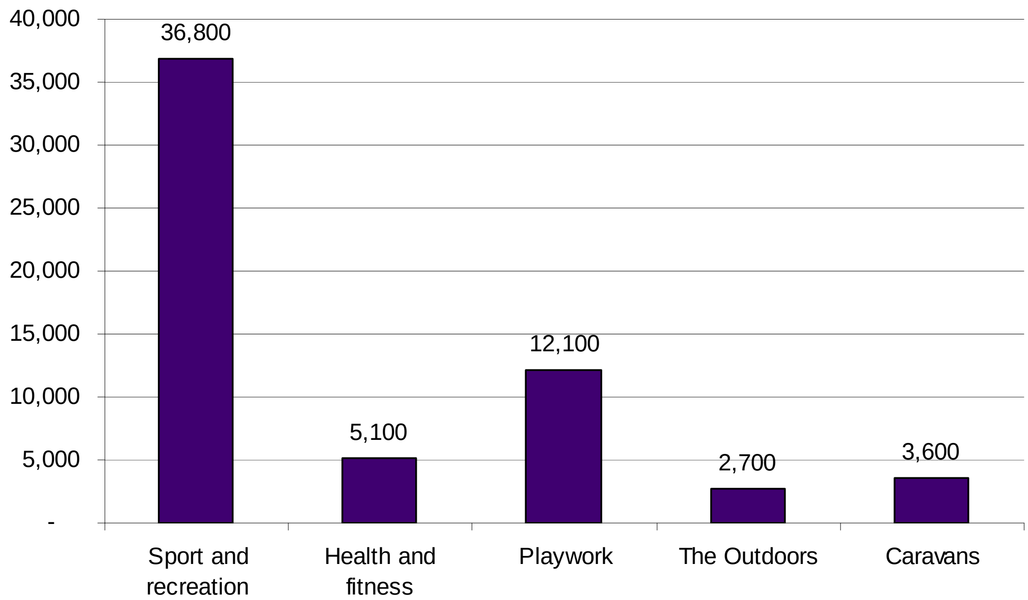
2.2.2. Employment

The active leisure, learning and well-being sector in Scotland has an estimated 58,200 people in employment, accounting for 2.2 per cent of all industry Scottish employment (similar to the 2.0 per cent sector contribution to UK employment). Overall, Scotland contributes nine per cent to total UK active leisure, learning and well-being employment (figure 2.2.2 (a)). Average annual employment growth in active leisure, learning and well-being outperformed overall growth in Scotland four-fold from 1999 to 2004. The sector also impacts on tourism, events, retail, manufacturing and construction.

SkillsActive estimates are larger than those presented in the Scottish Sector 2009 Profile for the sector which identifies 35,100 people in employment accounting for 1.5 per cent of all Scottish jobs. This can partly be attributed to only 100 per cent SIC codes being used (see section 2.1 earlier) which excludes playwork and other sector specific occupations. Positively, the report also identifies a higher increase in employment, between 2003 and 2008, than seen across all Scottish industries (11 per cent compared to nine per cent).[4]

[4] *Sport and recreation, health and fitness, outdoors, playwork and caravanning industry: Scottish Sector Profile 2009*, Alliance of Sector Skills Councils, Scotland, December 2009 (also referred to as the Scottish Sector Profile 2009 report)

Figure 2.2.2 (a): Total employment by active leisure, learning and well-being sectors in Scotland, 2008



Source: SkillsActive derived from ABI 2007 and average annual LFS 2008

SkillsActive calculations based on official sources show that the largest employer, as in the case of output, was the sport and recreation sector, employing 63 per cent of the total. Playwork was the second largest, employing 21 per cent. The outdoors was the smallest sector (five per cent).

Figure 2.2.2 (b): Employment in active leisure, learning and well-being in Scotland, 2008

	2008 Total	Share of total active leisure, learning and well-being sector in Scotland**
Active leisure, learning and well-being	**58,200**	-
Sport and recreation	36,800	63.3%
Health and fitness	5,100	8.8%
Playwork	12,100	20.8%
The outdoors	2,700	4.6%
Caravans	3,600	6.2%
Whole economy	**2,687,000**	-
Scotland active leisure, learning and well-being employment as a percentage of UK active leisure, learning and well-being employment		9%
Scotland active leisure, learning and well-being employment as a percentage of Scotland whole economy employment		2.2%

***Due to overlap of sectors, the sum of percentage output from each sector is greater than 100%.*

Source: SkillsActive derived from ABI 2007 and average annual LFS 2008

2.3. 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**

and recreation 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 governing body of their 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; public facilities account for roughly 60 per cent 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 rest of the fitness industry is privately owned and commercially run, accounting for 51 per cent of total gym memberships[5].

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 operations.

Playwork in Scotland has expanded over the recent years. It has never been statutory provision. Provision includes breakfast clubs, out of school provision, wrap around care, holiday playschemes, adventure playgrounds and is for children aged 4-16. More recently the National Lottery has allowed many play settings to be established, but there is a question about longer-term sustainability.

The **caravans** sector 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.

2.3.1. Market and company structure

SkillsActive estimates, based on the Annual Business Inquiry, employees work in approximately 4,200 workplaces in Scotland and 74 per cent of those establishments have a maximum of 10 employees, 22 per cent have between 11 and 49 employees, while just four per cent fall into the 50-199 category (see figure below). This breakdown is similarly reported in the Scottish Sector Profile 2009 for active leisure, learning and well-being,[6] although only 3,300 workplaces are identified, based on a smaller SIC footprint. The figure below shows SkillsActive industries have a lower proportion of micro businesses (1-10 employees) than the Scottish whole economy but a higher proportion of small businesses (11-49 employees).

Figure 2.3.1 (a): Size structure of establishments in Scotland, 2007

	Active leisure, learning and well-being	Whole economy
1-10	74%	81%
11-49	22%	15%
50 plus	4%	4%
Total establishments (N)	4,200	176,300

Source: SkillsActive derived from ABI 2007

[5] The Leisure Database Company, *2007 State of the UK Fitness Industry Report,* Fitness Industry, Association, July 2007

[6] The Scottish Sector Profile 2009 reports 74% of workplaces have 0-10 employees, 23% have 11-49 employees and 3% have 50 plus employees in March 2008.

The data has limitations (due to low sample sizes) in reporting by sizeband for sub-sectors but results indicate sport and recreation and health and fitness have a similar size structure to the average for active leisure, learning and well-being whilst the outdoors and caravans have a structure more closely aligned to the Scottish all industry average. Playwork has a higher proportion of small businesses (39 per cent) and fewer micro-businesses (53 per cent).

Large chains, such as Bannatynes, are prevalent in the private fitness industry. Many sector employers have also developed into well-known brands like Outward Bound and PGL, but the majority are still small operations.

Scotland's geographic features and distribution of population and businesses vary considerably, from heavily populated areas in central Scotland to sparsely populated, mountainous and often inaccessible areas including the Highlands and Islands, and in some parts of the Scottish Borders, Dumfries and Galloway, and rural Aberdeenshire and Perthshire. One impact on the sector is that some isolated communities in the Highlands and Islands can be excluded from accessing play opportunities.

2.4. Profile of workforce

2.4.1. Personal profile

Compared with Scotland's working population as a whole, active leisure, learning and well-being employees are more likely than average to be women, younger (in their thirties or younger) and more likely to work part-time.

Gender

The active leisure, learning and well-being sector is distinctive by its relatively high proportion of females working in the sector: 29,500 women, representing 51 per cent of sector employment, compared to 47 per cent in the whole Scottish economy. Playwork has the highest proportion (86 per cent) of females which overall, gives the SkillsActive workforce its more female profile. The remaining sub-sectors all have a higher proportion of men than women. The Scottish Sector Profile 2009 report for the sector indicates a slightly higher male contingent (53 per cent) and this is partly explained by the focus on sport in the smaller SIC footprint used.

Figure 2.4.1 (a): Gender breakdown of Scottish employment

	Male	Female
Active leisure, learning and well-being	**49%**	**51%**
Sport and recreation	62%	38%
Health and fitness	*	*
Playwork	14%	86%
The outdoors	**	**
Caravans	**	**
Whole economy	**53%**	**47%**

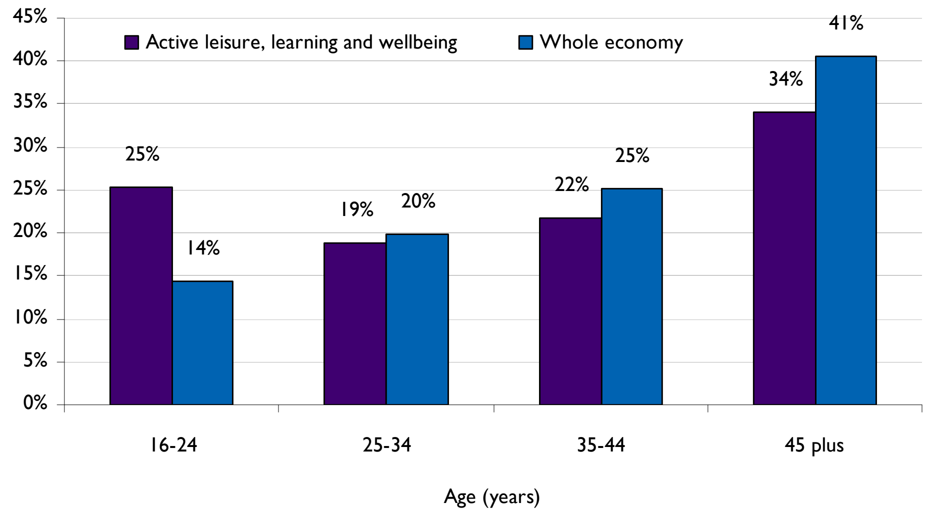
Source: SkillsActive derived from annual average LFS 2008

Age

Overall, the active leisure, learning and well-being workforce displays a younger age profile to that of the whole Scottish economy with a higher proportion of 16-24 year olds (labour market entrants); 25 per cent in the sector compared to the national average of 14 per cent. This is also evidenced in the Scottish Sector Profile 2009. 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.

A breakdown by sub-sector is limited by the available data (the sample sizes are too small to report). Sport and recreation has a younger than average workforce with 33 per cent aged 16 to 24 years. The data indicates that health and fitness has a similarly high proportion in that age range. Playwork has a relatively older age profile with nearly half aged 45 or older (48 per cent). There is a core of experienced, qualified often older workers, in the sector. However, there continues to be also a large group of young workers involved in the sector on a temporary basis, usually during summer playschemes. This is partly attributable to returners to work in playwork and workers gaining an interest in the sector later in life. The data indicates that the caravans sector has a workforce mainly aged 35 years or older. This sector is typified by family-run businesses.

Figure 2.4.1 (b): Age breakdown of the Scottish workforce, 2008



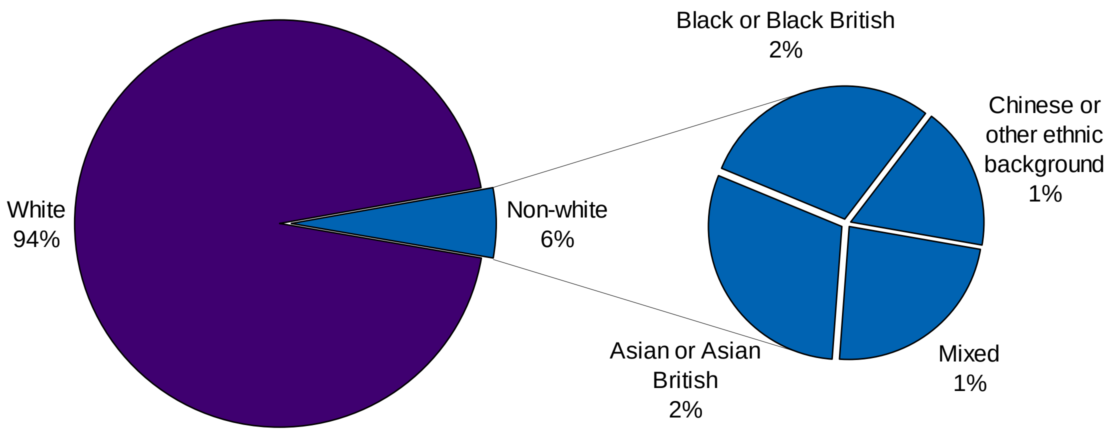
Base: All employment (including self-employed)
Source: SkillsActive derived from annual average LFS 2008

Ethnicity

The figure below shows the ethnic composition of the active leisure, learning and well-being workforce in the UK; Scotland's sample is not robust enough to report. Overall, the sector is mainly white as seen across all industries in the UK economy (94 per cent of SkillsActive industries compared to 91 per cent across all UK industries). The Scottish whole economy has a larger white composition (97 per cent) and it is expected this would be reflected in the active leisure, learning and well-being workforce in Scotland.

In terms of non-white ethnic groups, the UK sector workforce has a smaller Asian or Asian British workforce to that across all UK industries (two per cent compared to four per cent) but a slightly higher proportion of mixed ethnic background (1.3 per cent in SkillsActive industries compared to 0.7 per cent in the whole economy).

Figure 2.4.1 (c): Ethnicity in the active leisure, learning and well-being UK workforce, 2008



Source: SkillsActive derived from annual average LFS 2008

2.4.2. Occupation

The figure below describes a more detailed occupational breakdown of the active leisure, learning and well-being sector in Scotland in 2004[23], and compares this to the whole Scotland economy. The percentage of total employment within each of the ten most significant occupations is shown indented. There has been little variation in the principal occupations.

From this it can be seen that managers and senior officials, associate professional and technical occupations, personal service occupations and elementary occupations are more important within Scotland active leisure, learning and well-being than they are in the general Scotland workforce.

As would be expected, the most over-represented are those classified as managers and proprietors in hospitality and leisure services, sports and fitness occupations and leisure and travel service occupations.

Other important occupations include childcare and related personal services, reflecting the playwork sector's requirements. The importance of teaching professionals also arises from the inclusion of some educational categories within playwork.

Secretarial and related occupations are over-represented within the active leisure, learning and well-being workforce, reflecting the importance of membership and booking staff to the sector, and administration of the increasing legislative or regulatory requirements.

[23] *The Future for Active Leisure and Learning – Scotland,* Experian Business Strategies, 2005

Figure 2.4.2 (a): Detailed occupational profile of the workforce in Scotland, 2004 (per cent of total employment)

	Active leisure, learning and well-being	Whole economy
Managers and senior officials	19.2%	12.8%
Functional managers	2.7%	3.3%
Managers and proprietors in hospitality and leisure services	11.6%	1.9%
Professional occupations	10.9%	11.9%
Teaching professionals	9.1%	4.1%
Assistant professional and technical occupations	15.2%	12.8%
Sports and fitness occupations	9.3%	0.2%
Administrative and secretarial occupations	10.4%	13.4%
Secretarial and related occupations	5.9%	3.6%
Skilled trades occupations	7.2%	12.8%
Agricultural trades (includes grounds(wo)men	3.5%	1.1%
Personal service occupations	19.1%	7.8%
Childcare and related personal services	7.9%	2.1%
Leisure and travel service occupations	6.7%	0.8%
Sales and customer service occupations	1.2%	8.0%
Process, plant and machine operatives	1.2%	8.6%
Elementary occupations	15.7%	12.1%
Elementary personal services occupations	9.8%	3.4%
Elementary cleaning occupations	4.2%	3.7%
Weighted Base	52,760	2,522,680
Source: Experian, August 2005; based on data sourced from National Statistics.		

Some elements of the workforce are not captured in great detail in the national statistics and SkillsActive has conducted sector-based research to derive a more fundamental understanding of the sub-sectors and the roles within them.

One of these areas is playwork. This is not well defined within the SOC codes but there are three clear groupings within the playwork workforce[12]:

- **Playworkers**: people who work face-to-face in settings and including managers of settings;
- **Playwork facilitators**: people who facilitate the provision of play settings and opportunities but are not directly providing it (e.g. playwork co-ordinators, trainers, EYDCP (Early Years Development and Children Partnership) officers; and
- **Play-related workers**: volunteers and paid workers in settings or services where play is an element but not the main focus of the activity or services provided (e.g. youth groups, leisure schemes that focus on sport, school assistants, etc).

2.4.3. Qualification

Figure 2.4.3 (a) presents a break-down of the Scottish active leisure, learning and well-being workforce by the highest level of SVQ or equivalent qualification each individual has achieved.

[12] For more details of the Playwork sector see the Skill Needs Assessment: PLAYWORK, SkillsActive, 2005

The distribution of qualification levels held by the active leisure, learning and well-being workforce in Scotland shows a similar spread to the average for the whole Scottish economy. However, there are a higher proportion of workers qualified to levels 4 and 5 than is average for both the whole Scottish and UK economies. This high percentage of workers with a good qualification level and low productivity in Scotland leads the Scottish government to believe utilisation of skills is a major issue for the active leisure, learning and well-being sector.

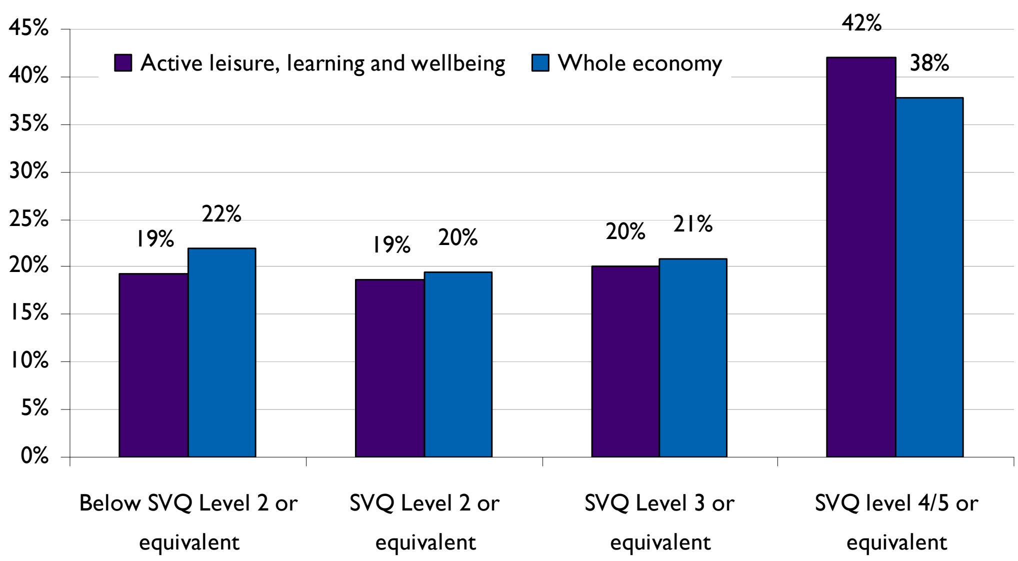
Relatively, playwork is the most well qualified sector, as 56 per cent of its workers have level 4 or 5 qualifications. This is perhaps a reflection of the SIC definition of playwork, which contains a characteristically highly qualified primary education workforce. Through work at SkillsActive it has been found that playwork has never been a statutory provision and in the past it has depended upon local mainly unqualified workers, however, there has been a huge shift in qualifications for workers due to registration requirements with the Scottish Social Services Council (SSSC).

Sport and recreation has 19 per cent of workers below SVQ level 2 and 39 per cent qualified to level 4 or 5. Although health and fitness cannot be reported due to a small sample size the data indicates it has a similar profile to sport and recreation.

The caravans sector is not robust enough to report below but previous research indicates it is the least well qualified. In 2004 SkillsActive research reported three in ten of the workforce had none or level 1 qualifications, whilst around a quarter had level 4 or 5 qualifications.[7]

In common with hospitality, employment in outdoor operations providing accommodation and the caravans sector includes low skilled, low paid jobs, like waitresses, bar staff, housekeepers, cleaners and caretakers. This in part accounts for the higher proportion of staff without an SVQ level 2 or equivalent qualification.

Figure 2.4.3 (a): Employment by qualification level in Scotland, 2008



NOTE: The level does not necessarily equate to a vocationally relevant area, e.g. although a person working in playwork may be qualified to level 4, this may be not be in a level 4 playwork qualification but a result of their previous employment in education where they gained a level 4.

Source: SkillsActive derived from annual average LFS 2008

[7] *Skill Needs Assessment for Active Leisure and Learning in Scotland*, SkillsActive, 2005

2.5. Employment status

Around nine out of ten people working (89 per cent) in the SkillsActive sector are employees with 11 per cent being self-employed overall. These levels are similar to those for the whole Scottish economy.

The main differences occur in the employee status of the active leisure, learning and well-being workforce where part-time work is more common than in the Scottish whole economy. Half of employees in SkillsActive industries work part-time compared to around one third (32 per cent) of the whole Scottish workforce. This is similarly reported in the Scottish Sector Profile 2009. Part-time work provides opportunities for females, single parents and returners to work and results in the sector being much more favourable to these groups.

Employees in sport and recreation and playwork are slightly more likely to be part-time accounting for 52 per cent of employees in each sub-sector compared to a sector average of 50 per cent. The outdoors and caravans sectors are more likely to have full-time employees with 56 per cent and 67 per cent, respectively, in that status.

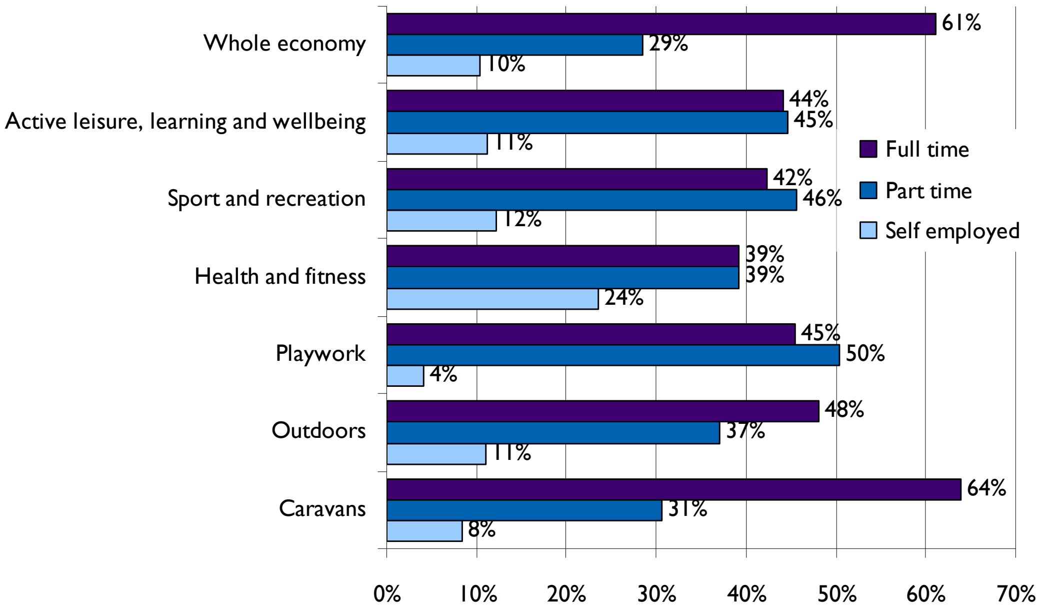
Figure 2.5 (a): Employment status of the Scottish workforce, 2008

	SkillsActive	Whole economy
Employment status		
Employee	89%	90%
Self-employed	11%	10%
Full / part-time employee status		
Full-time	50%	68%
Part-time	50%	32%

Base: All employment
Source: SkillsActive derived from ABI 2007 (employees) and average annual LFS 2008 (self-employed)

A detailed breakdown of employment by full-time, part-time and self-employment (see figure below) shows the relative importance to each sub-sector. Full-time workers are key to caravans, as noted earlier, accounting for 64 per cent of overall employment in that sector. Self-employment is most important to health and fitness (24 per cent of the workforce) whilst only four per cent of employment in playwork falls into this category.

Figure 2.5 (b): Employment breakdown by job status in Scotland, 2008



Base: All employment
Source: SkillsActive derived from ABI 2007 (employees) and average annual LFS 2008 (self-employed)

In addition to the employment figures above there is a seasonal and voluntary workforce who make a vital contribution to the active leisure, learning and well-being sector. This is difficult to capture through official statistics.

2.5.1. Seasonal

Seasonal employment is important for the outdoors, caravans and holiday playschemes, which attract students and other temporary workers. Along with "sessional" work, this clearly presents challenges for employers in terms of recruitment and investment in training.

In 2004, SkillsActive commissioned employment research from Glasgow Caledonian University which provided an insight into the importance of seasonal staff to different sub-sectors. Overall, they were estimated to account for 15 per cent of the extended workforce with a high of 24 per cent in the outdoors. The importance of seasonal work was reinforced by SkillsActive research profiling the outdoors sector in 2009[8].

Experian calculates that employment in the caravans sector (across the UK) is seven per cent higher than the average throughout the year in the summer, but almost an equivalent proportion lower in the winter months. The Caravan Parks Report 2004 by SkillsActive shows seasonal employment to form just over 70 per cent of employment. It is clearly a very important group for this sector.

In 2005, research commissioned for Sport 21 (2003-07) into paid employment to fulfil the then Sport 21 strategy targets found that half of coaches / instructors / activity leaders fell into 'other' that consisted of people working less than 15 hours per week.

[8] *The Outdoors Census*, SkillsActive 2009

2.6. Volunteers

The Scottish Sports Association and **sport**scotland estimate that there are some 146,000 people involved in sport as volunteers[9]. The staging of the Glasgow 2014 Commonwealth Games will require around 15,000 Games-time volunteers.

The results of the main 2007/2008 Scottish Household Survey[10] show that 31 per cent of adults (1.3 million adults) gave unpaid help, either through an organisation or as an individual, during the previous 12 months. It reports 15 per cent of adults provided help to organisations involved in sport or exercise.

A large significant difference was found in the 15 per cent most deprived areas where only nine per cent have provided help to such organisations in the last 12 months compared with 16 per cent in the rest of Scotland. This survey also demonstrates that volunteering in children's activities is the most common area for people to undertake voluntary work. Playwork is most likely to be encompassed in the 'youth / children' and 'children's activities associated with schools' categories in the figure below.

Figure: 2.6 (a): Types of organisations or groups for which adults provided help for in last 12 months by Scottish index of multiple deprivation

Adults	15% most deprived	Rest of Scotland	Scotland
Children's activities associated with schools	20%	22%	**22%**
Youth/children	15%	22%	**22%**
Religion	13%	17%	**17%**
Health, disability and social welfare	15%	16%	**16%**
Hobbies/recreation/arts/social clubs	14%	15%	**15%**
Local community or neighbourhood groups	15%	15%	**15%**
The elderly	15%	13%	**13%**
Sport/exercise (coaching or organising)	9%	16%	**15%**
The environment, animals	3%	6%	**6%**
Education for adults	3%	4%	**4%**
Citizens groups	3%	3%	**3%**
Safety, first aid	2%	3%	**3%**
Justice and human rights	4%	3%	**3%**
Politics	2%	2%	**2%**
Trade union activities	1%	2%	**2%**
None of these	8%	6%	**7%**
Base	303	3,499	**3,802**

Source: Scottish Household Survey 2007/2008
This question is only asked of half the sample.
Columns may add to more than 100% since multiple responses allowed.

The People and Sport in Scotland report based on 2007 data found that half (51 per cent) of adults who had done sport-related volunteering said that this had involved coaching, 43 per cent said it involved helping to run a sport organisation or club, 22 per cent said that their volunteering involved officiating and 20 per cent said that their volunteering involved something else.[11]

[9] *Briefing Paper for MSPs: Members' Business Debate 17 September 2008*, Volunteer Development Scotland, 2008. This is likely to relate to formal volunteering.
[10] *Scotland's People Annual report: results from 2007/2008 Scottish Household Survey*, Scottish Government, 2009
[11] *People and Sport in Scotland 2007*, Scottish Government, August 2008

Additionally, **sport**scotland in 2005 shows the activities of regular volunteers in sport, many of whom undertake more than one role.[12]

Figure 2.6 (b): Activity of regular sports volunteers in Scotland

Sports Volunteering Activity	Percentage of Regular Sports Volunteers
Helped with activities/coaching	71%
Helped to raise money	43%
Served on a committee	39%
Organised or helped to run an event	37%
Helped with admin or office activities	28%
Campaigned for a cause or interest	10%

According to **sport**scotland there are approximately 13,000 sports clubs in Scotland, 93 per cent of which cater for one single sport.[13] These clubs are usually run by committees of volunteers. In addition there are volunteers in coaching, officiating, administration and other roles. Sport could not exist without volunteers. Only a few clubs employ staff - coaches, stewards, golf professionals or development officers. As well as working (unpaid) for sports clubs, volunteers work in other settings delivering sport, for example in schools and in youth organisations.

SkillsActive is putting emphasis on the skills needs of those professional officers whose role it is to recruit, manage and support these volunteers as this is a crucial element of continuing the sector's voluntary workforce.

2.7. Coaching

The Scottish Household Survey 2008 (SHS) reported 22 per cent of people participating in sport within the last year had received sports tuition. Women were more likely than men to have received tuition (26 per cent of females compared to 18 per cent of males). Overall, tuition decreased with age.

The propensity for females to receive instruction is reflected in the top ten sports receiving tuition in the figure below. A much higher proportion of females had an interest in keep fit / aerobics, yoga/ pilates and dancing (as would be expected). Within the top ten sport males only feature more strongly than women in golf and rugby. Multi-gym / weights tuition is common across both sexes.

Figure 2.6.1 (a): Type of tuition by gender (adults who had participated in sport in the last 12 months)

Top 10 Sports	Male	Female	Total
Keep fit / aerobics	6%	25%	17%
Multi gym / weights	10%	16%	13%
Yoga / pilates	3%	19%	12%
Golf	11%	4%	8%
Dancing	1%	12%	8%
Horseriding	2%	8%	5%
Athletics	2%	7%	4%
Cycling	3%	7%	4%
Martial arts	3%	4%	3%
Rugby	6%	0%	3%
Base	2,388	2,886	5,274

Source: Scottish Household Survey 2007/8 data

[12] *Briefing Paper for MSPs: Members' Business Debate 17 September 2008, Volunteer Development Scotland*. This is likely to relate to formal volunteering

[13] *Sports Clubs in Scotland* Research Digest 59, **sport**scotland, 2001(Sport 21 Background Report 10)

Sports Coaching in the UK II, conducted by sports coach UK in 2006, suggests a smaller proportion of adults participating in sport in the last 12 months (10 per cent) had received coaching. This is likely to be a result of variation in questions and the broader scope of the SHS.

Overall, sports coach UK estimate there are 64,000 coaches[14] in Scotland out of the 1,177,000 across the UK (equivalent to two per cent of the adult population). There is increasing evidence that there are relatively fewer coaches in Scotland than the rest of the nations.

At a UK level, the majority of coaches continue to work on a voluntary basis (70 per cent; equates to 44,800 coaches in Scotland), although there are indications that coaching is becoming more professionalised (levels of volunteering decreased from 81 per cent in 2004). Nevertheless, of those that are working in a paid capacity, the vast majority do so on a part-time basis. Overall, just seven per cent of UK coaches are estimated to work in a full-time paid capacity.

In terms of the coaching profile, around 62 per cent are male and the data suggests there are clusters of coaches within the 16-24 year old cohort (30 per cent) and the 35-44 year old cohort. The average age of a coach is therefore considered to be around 36/37 years.

In terms of coaching settings, just over a third of regularly practising coaches do so in a club environment (34 per cent). Other commonly cited settings included schools - outside of PE lessons (19 per cent), youth clubs (11 per cent) and leisure centres (11 per cent).

Half of practising UK coaches (50 per cent; equivalent to 32,000 coaches in Scotland) held an up-to-date coaching qualification in the sport that they coached. Again, there are indications that the occupation is increasing in professionalism, since the 2004 survey suggested that 62 per cent of coaches were unqualified. One reason for the increase in qualified coaches may be due to the increased commitment to developing coaches such as the introduction of the UK Coaching Certificate (UKCC).

[14] Those undertaking coaching at least once per week for a minimum of a 30 minute session

3. KEY DRIVERS OF BUSINESS COMPETITIVENESS

3.1. Primary 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 that also impact on the sector.

3.1.1. Government drivers

The Scottish government is the devolved administration for Scotland. It is currently governed by the Scottish National Party. In November 2007 national and local government signed a concordat which committed both moving towards a single outcome agreement.

The government is responsible for most of the issues of day-to-day concern to the people of Scotland. Amongst such responsibilities devolved to the Scottish government as education and training, tourism, and sport, the entire sector covered by SkillsActive is included.

Government drivers are hugely influential on the SkillsActive sector, often determining funding streams and target groups. These can and do act as both positive drivers and barriers or inhibitors to the sectors achieving their aims.

Scotland Performs: National Performance Framework

The Scottish government has a single purpose - to create a more successful country where all of Scotland can flourish through increasing sustainable economic growth.

The Scottish government is explicit in its desire for a successful Scotland, which is a healthy, safe, well-educated country, with a vibrant economy and opportunities for all. It also wants Scotland to be fair, tolerant and green.

The **National Performance Framework** (see annex three) describes the outcomes the government wants to achieve and will measure how well Scotland is progressing in key areas: health and well-being; justice and communities; the environment; the economy; and education and skills.

In 2007 the **Government Economic Strategy** set out a clear and achievable way forward that will deliver the purpose and secure Scottish success. The government has set a series of high level purpose targets and has defined an outcomes-focused approach to performance that involves the whole of the public sector. The Scottish government has taken a partnership approach to delivery and measurement of the National Performance Framework and the public sector is expected to contribute to the overall purpose with local service delivery and management of services. Leadership and direction will be provided by the Scottish government.

While this is seen in the most part positive, it does mean an end to ring-fenced funding which can be seen as a drawback for services that are not a priority, or explicitly mentioned in the Framework.

The ambition of SkillsActive in Scotland is to deliver a more skilled and competent workforce. Therefore the sector touches on many of the national outcomes as detailed above with specific importance attached to:

- Smarter Scotland: a better match of supply to demand;
- Healthier Scotland: foster healthier lifestyles and better quality of life;
- Wealthier and fairer Scotland:
  -to increase utilisation of and demand for skills, implement and ensure national training programmes are appropriate and responsive, flexible provision;

-to ensure a continued supply of skilled people that business needs from colleges and universities;
-to be smarter and healthier by improving the health of people in disadvantaged communities;

- Safer and stronger Scotland: reducing crime and re-offending;
- Greener Scotland: creating economic opportunities associated with Scotland's environment to help rural households achieve greater wealth while enhancing and protecting it.

3.1.2. Sport strategies

There are a number of key strategies contributing to the sport and physical activity agenda. The main ones are identified below.

'Reaching Higher - building on the success of Sport 21': The National Strategy for Sport in Scotland

This is the sport strategy for Scotland owned by the Scottish government, its vision for a country where sport is more widely enjoyed and available, sporting talent is recognised and nurtured and world-class performance is achieved and sustained.

The strategy was launched on 8 March 2007 and was produced following a scheduled review of Sport 21: 2003-2007. It states:

> "We want a country where our sports organisations work in partnership towards a common goal and where our coaches, volunteers and sports administrators are well trained and their contribution is respected and valued";
>
> "People are our most important resource. Well-trained, motivated, confident and capable coaches, officials, volunteers and professional staff are core to the delivery of our vision"

Here there is a very clear steer on the need for a well-trained workforce that provides acknowledgement for the role of SkillsActive in contributing to this aim. There is also an aim to build a professional infrastructure of paid and voluntary coaches; building a strong career pathway in sport which will allow volunteers to move into, and out of, paid employment

The overall target is to increase participation by 2020 with 60 per cent of Scotland's adult population participating in sport at least once a week.

Physical Activity Strategy – Let's Make Scotland More Active

Scotland's first ever Physical Activity Strategy was published by the Scottish Executive in February 2003. The strategy was the outcome of 18 months' work by a Physical Activity Task Force, set up to implement a recommendation in 'Towards a Healthier Scotland'. The document focuses on the other components of physical activity aside from sport (that has its own strategy): exercise, play, dance and active living (e.g. gardening).

The strategy underwent its first 5 Year Review in 2008. The Review restated the importance of physical activity and called for the continuation of the strategy alongside some additional recommendations. These included improvement to the built environment to encourage physical activity and, greater coordination at a local and national level; local authorities were recognised as the most important local delivery agency for physical activity.

The strategy adopted national targets on activity levels drawn up by the task force, to combat the fact that from age 11 onwards, the majority of people are inactive, with higher inactivity levels among girls and women of all ages. It was based upon 'two well-accepted health messages at that time:

- Adults should build up at least 30 minutes of moderate activity (the equivalent of brisk walking) on most days of the week;
- Children should build up at least one hour of moderate activity on most days of the week.

Targets were set for all adults and all children aged 16 and under to meet minimum recommended levels of physical activity by 2022. The UK Physical Activity Guidelines are currently under review.

The 'strategic focus and priority' is on getting inactive people to be active and preventing people from reducing the amount of activity they do. It deliberately provides 'only a broad framework of objectives and priorities for developing physical activity'.

In April 2004, NHS Health Scotland commissioned consultants to conduct a training needs analysis of the workforce involved in the promotion of physical activity in Scotland. Their report suggested that there are three broad categories of people who have a role to play in promoting physical activity.

1. Those who promote activity as a core remit of their post.
2. Those for whom the promotion of physical activity is a key part of their work but not their main focus.
3. Those who play a supporting role in the promotion of physical activity, many of whom may be unaware that they could/should be active in this role.

Clearly **playwork** has a role in delivering the physical activity strategy. Two other key policies are the Curriculum for Excellence and the Early Years Framework. These direct attention towards the social, emotional and cultural context of learning, as well as towards the relationship of services to families and communities. Both policies consider the child and their family as active partners in their learning, in and out of school.

Curriculum for Excellence

The Curriculum for Excellence aims to achieve a transformation in education in Scotland by providing a coherent, more flexible and enriched curriculum for young people from the age of three to 18 years.

The purpose of Curriculum for Excellence is to ensure that all the children and young people of Scotland develop the attributes, knowledge and skills they will need if they are to flourish in life, learning and work, now and in the future. Sport has a role as one of the delivery methods to achieve those aims. Embedding participation in physical activities needs to be a core ingredient of a child's healthy lifestyle.

The changes brought about by Curriculum for Excellence should lead to improved quality of learning and teaching and increased attainment and achievement for all children and young people in Scotland, including those who need additional support in their learning.

Early Years Framework

The Early Years Framework (2008) is a policy which aims to give children the best possible start in life. It builds on partnership and integrated working across the wider children's workforce. In it, playwork is recognised as a crucial part of the workforce. The framework has identified eight areas to focus on, play being identified as one of these key areas, with particular emphasis on play and risk.

3.1.3. Consumer trends

Increasing health awareness

There is an inherent link between health and the physical activity agenda examined earlier.

In SkillsActive research in 2005 with employers[15] each of our sectors emphasised increasing health awareness, and fear of ill health and the consequences of a sedentary lifestyle as major consumer drivers. There is evidence that Scots are becoming increasingly aware of their own health and the value of exercise. This is being encouraged by the Scottish sport and physical activity strategies and NHS Health Scotland campaigns resulting in an increase in demand for a range of health and sporting services. These include:

- Outdoor activities, ranging from gentle walking to extreme activity
- Workplace fitness facilities
- Mass events such as fun runs
- Cycling both for pleasure and as a form of commuting.

There is still more work required to meet the Scottish government's long-term target of getting more adults and children to participate in physical activity (see section 3.1.2). The **Scottish Health Survey** 2008[16] reported on the overall health of the nation. It found the level of men and women (aged 16-74) meeting the recommended physical activity levels (30 minutes of at least moderate exercise on most days of the week) had increased. The proportion of men participating regularly had increased from 40 per cent in 1998 to 46 per cent in 2008, and women from 29 per cent in 1998 to 35 per cent in 2008. In the case of children, 72 per cent of boys and 56 per cent of girls aged 2-15 met the recommended level for children (60 minutes or more on 7 days a week).

Sports and exercise was the most common activity type (in the past four weeks of at least 10 minutes duration) among men (54 per cent) and the second most common for women (at 45 per cent) after heavy housework (63 per cent) in 2008. The 2003 report identified the most common type of physical activity for boys and girls as walking, followed by active play and sports and exercise.[17]

Overall, the health survey shows progress in physical activity and suggests further work is necessary to improve diet and reduce levels of obesity. The proportion of adults (aged 16-64) who were either overweight or obese steadily increased between 1995 and 2008, from 55.6 per cent to 66.3 per cent in men, and from 47.2 per cent to 59.6 per cent in women. Overall, a greater proportion of boys (36.1 per cent) than girls (26.9 per cent) were either overweight or obese. Between 1998 and 2008, the prevalence of overweight or obese boys significantly increased (from 27.8 per cent in 1998) but not among girls.

The average life expectancy is 75.0 years for males and 79.9 years for females.[18] In 2007, cancer, coronary heart disease and strokes, the so-called "three big killers", accounted for 27, 16 and 10 per cent, respectively, of all deaths.

[15] *Skill Needs Assessment for Active Leisure and Learning in Scotland*, SkillsActive, 2005. Visioning workshops with SkillsActive sectors in Scotland conducted in 2005 for the Sector Skills Agreement.
[16] *Scottish health survey 2008: summary of key findings*, Scottish Government, 2009
[17] Active play, defined as 'active things like ride a bike, kick a ball around, run about, play active games, jump around'. Sports and exercise: This category included activities such as swimming, football, tennis, gymnastics etc, and was intended to cover more 'organised' or structured sporting activities. *Scottish Health Survey 2003: a summary of key findings,* Scottish Executive, 2005
[18] Figures for 2006-2008. http://www.gro-scotland.gov.uk/press/news2009/life-expectancy-for-admin-areas-scotland-06-08.html accessed on 12 January 2010

Figure 3.1.3 (a): Health indicators for men and women

	Men		Women	
	1998	2008	1998	2008
Regular participation in physical activity[a]	40%	46%	29%	35%
Overweight or obese[a]	55.6%	66.3%	47.2%	59.6%
Average life expectancy (years)[b]	72.4	75.0	78.1	79.9

Source:
a. Scottish Health Survey 2008
b. GRO Scotland, 2009 (1998: based on period 1996-98; 2008: based on period 2006-08)

Actions being taken on diet and physical activity are presented jointly for the first time in **Healthy Eating, Active Living**. It looks at the three years to 2011 and builds upon established strategies focusing on problems with obesity and addressing health inequalities.

Broad objectives include actions to:

- Create, improve and maintain the supply of natural and built environments encouraging more active lifestyles;
- Develop, increase and maintain capacity in a wide range of settings and sectors to support people to become more active;
- Stimulate interest in and demand for increased participation in physical activity.

The **Vision for Scotland in 2020** (in 'Improving Health in Scotland – the Challenge', 2003) aims for a thriving Scotland where quality of life is improved (including more daily activity), enhanced well-being and increased life expectancy with fewer deaths from heart disease, diabetes and cancer. More people choosing to live healthy lives and children getting the right opportunities (as established in the Curriculum of Excellence).

Tourism

Tourism is one of Scotland's major business sectors. The annual spend is over £4.0 billion and employs 218,000 people. Scottish tourism contributes 11 per cent of the Scottish service sector economy compared to nine per cent for the UK as a whole.[19] **Scottish Tourism: The Next Decade - A Tourism Framework for Change** (2006) sets the ambition that tourism will grow by 50 per cent by 2015.

Tourism employs and sustains many small businesses and rural communities and is an important element in the social, economic, environmental and cultural well-being of Scotland. The sector delivers enormous value to the economy, and any downturn in trade can have a lasting impact.

Many of SkillsActive sectors contribute to tourism, for example golf, cycling, climbing and caravanning and therefore are also susceptible to changing holiday trends and seasons.

Sporting events make a valuable contribution and can attract large audiences. The Mountain Biking World Championships held in Scotland in 2007, attracted an estimated audience of 40,000 people. The Ryder Cup in 2014 will bring a different audience of sports fans, and the Glasgow 2014 Commonwealth Games will bring with it a huge audience - similar numbers are expected to the Manchester Commonwealth Games that brought one million visitors to Manchester over the ten days of the Games. The London 2012 Olympic Games and Paralympic Games will also bring an

[19] *Tourism in Scotland 2008,* Visit Scotland, (provisional) June 2009. Latest employment figures are 2006.

increased number of visitors to the UK.[20] The latest announced event is the UCI Juniors Track Cycling World Championships which will see around 220 riders aged 19 and under take part from 60 countries across the world and has an estimated economic impact of £2.2 million[21].

For sport and recreation, health and fitness, the outdoors and caravans sub-sectors the Scottish natural environment and cultural identity are perceived as key assets and can form a major part of their marketing strategies for sports-related tourism including walking, cycling and the outdoors. These assets may be regarded as both a consumer driver in terms of being a source of demand from potential tourists, and a government driver because of their key contribution to the Scottish government's economic strategy, and to their health agenda.

However, it is recognised that scenery and culture are not enough in their own right to encourage sectoral development, and that this must be backed up by appropriate skillsets (a mix of both technical and soft skills) in employees to ensure that visitors and customers have a high quality experience which is also highlighted in the Scottish framework for change.

The Caravan Club reports some 180 locations across Scotland and club members spend over £17m in local communities when caravanning in Scotland[22]. One of the main positive drivers to the **caravans** sector was the support through VisitScotland and their marketing campaigns (like Autumn Gold) which promote the Scottish "brand" and were particularly cited by employers back in 2005. Tourist income has greatly benefited the sector and anecdotal evidence suggests that Scottish activity providers and caravan parks have benefitted from the 'staycation' market particularly during this current economic climate.

On Your Marks…: a Games legacy for Scotland (Scottish Government, September 2009)

The XXth Commonwealth Games will be held in Glasgow and start on 23 July 2014; in addition to winning medals the aim is to achieve lasting benefits. On Your Marks sets out the initial plans for building a lasting positive legacy from the Games and other major sporting events, including the London 2012 Olympic Games and Paralympic Games and 2014 Ryder Cup.

The Scottish government is one of three Scottish partners in the Games, and will contribute 80 per cent to the net public cost of the Games. The other partners are Glasgow City Council, who will contribute 20 per cent to the net public cost of the Games, and the Commonwealth Games Scotland.

The plans set out aspirations up to 2019 and will be updated annually. The main components are 'An Active Scotland', 'A Connected Scotland', 'A Sustainable Scotland' and 'A Flourishing Scotland'. Participation in physical activity and sport is at the heart of the plan.

The active leisure, learning and well-being sector is uniquely placed to benefit from the Games with a focus on increasing physical activity and attracting previously un-engaged parts of the population as well as a focus on support with the right training and skills (including volunteers). It can also benefit from plans to develop the tourism infrastructure. The key areas are highlighted below.

- A new physical activity programme in the run up to 2014 and beyond to encourage the population to set a personal (registered) goal to improve their health and fitness over the next ten years. In addition, the Scottish Association for Mental Health's "Get Active" programme for sport, physical activity and mental health will run between 2009 and 2014.

[20] *Scottish Tourism: The Next Decade, a tourism framework for change,* Scottish Executive, 2006
[21] http://www.eventscotland.org/press/39 accessed on 29 January 2010
[22] http://www.busycaravanning.com/ accessed 28 January 2010

- A network of community sports hubs to be developed in partnership with COSLA[23], local authorities and **sport**scotland and supported by a dedicated implementation group. It will contribute to achieving the national sport objectives for developing strong sports organisations and well-trained people and raise the profile of sport and physical activity in local plans.
- Elite performance and targeted medal success in 2014 will be a priority issue with investment from **sport**scotland and the Lottery. The investment will lead to a secondary impact on pathways within Commonwealth Games sports.
- The Games will be used in the run up to 2014 and beyond to engage young people in active learning across a range of curriculum areas, for example linking health and well-being, sport and nutrition to the sciences.
- Employers will have a voice through the Alliance of Sector Skills Councils who will work with partners to develop a strategic approach to identifying and addressing skills development issues for the successful delivery of the Games.

The London 2012 Olympic Games and Paralympic Games

The Scottish Executive supported the UK bid to host the Olympic Games and Paralympic Games in London in 2012 and there is an expectation that Scotland will benefit from the event itself and through a planned legacy left behind - see "Executive supports London Olympic bid"[24]

The only planned Olympic event is a football quarter final to be held at Hampden Park in Glasgow and Scotland has listed 28 Olympic and 11 Paralympic Pre Games training camps[25]. Scottish volunteers helping at the Games in London (and receiving appropriate training to help them to contribute), an increase in sports participation and physical activity levels in its population and an opportunity to showcase Scotland as a tourist destination. For this legacy to be realised, discussions are taking place now and plans being made.

Other consumer trends

These typically relate to the changing social and economic circumstances of the population. Family life is changing in Scotland with implications for all sectors within SkillsActive's footprint. Single parents often have to go out to work and increasingly, both parents are working to support their family. Childcare is in increased demand with knock-on effects for playwork. This is allied to an increasing tendency for parents to seek to avoid risk with regard to their children. That is to say, they do not want their children exposed to any activities that involve risk of injury (an active life will come with an element of risk).

Time and money are becoming precious resources and Scots are increasingly looking for 'value for time' and expecting higher standards for products and services they receive.

3.1.4. Legislation

The whole SkillsActive sector is affected by increasing legislation and regulation, which can have both a positive and negative impact. Health and safety is one of the main legislative areas that affect the sector in addition to employment legislation, the EU working time directive and Disability Discrimination Act that have been identified as drivers.

[23] The Convention of Scottish Local Authorities
[24] http://www.scotland.gov.uk/News/Releases/2004/11/15164927
[25] http://www.culture.gov.uk/reference_library/media_releases/6130.aspx/ accessed 29 January 2010

Research with employers in 2005[26] observed that such legislation can raise the cost of service and facility provision, thereby impacting on sector performance. Regulation was perceived as giving rise to additional paperwork and additional work through the need to monitor targets. Some legislation can also add barriers to work in the sector, some parts of which incorporate an element of risk, particularly when undertaking more extreme sports. The outdoors sector is particularly susceptible with health and safety (notably the working at heights directive), insurance, minibus driving, ensuring facilities are fit for purpose, employment law and planning amongst the main restrictions.

The increasingly strict regulation concerning working with children will have both positive and negative effects on the sector. While more checks will increase the costs organisations face when putting on activities for children, it will also go some way to easing the anxiety culture and encouraging parents to allow their children to participate.

Legislative requirements can also lead to the setting of common recognised standards and help towards professionalising the workforce such as in playwork. This is a sector that is subject to a range of regulations. The Early Years Review (2006) has been implemented and has also led to the development of Childhood Practice Standards (2007) for all of those working in childcare including playworkers. The Scottish government asked the Scottish Social Services Council (SSSC) to register the playwork and early years workforce against this benchmark framework. The register is linked to qualifications which are also related to job function. SkillsActive has been working in partnership with the Scottish government, Scottish Qualifications Authority (SQA), SSSC and playwork employers, to ensure that qualifications are suitably matched against job functions and Childhood Practice.

Registration with SSSC has required playworkers to be qualified to SVQ level 3 if a practitioner and SVQ level 4 if they have a job function as a lead practitioner. The registration expectations for achievement or working towards are set for 2010.

The Early Years Review has recommended that all managers in playwork settings work towards an SCQF level 9 qualification which is a degree or equivalent other. Playwork lead practitioners do not as yet have a completion date for this qualification requirement, but this is anticipated.

The Children (Scotland) Act 1995, the Protection of Children (Scotland) Act 2003 and the Regulation of Care (Scotland) Act 2001 introduced more stringent systems to make sure that all people who want to work with children are suitable to do so.

The **caravan** sector is influenced by national and local government, and the legislation and regulation arising from both of these, including health and safety, Gas Safe (formerly CORGI), electricity installation, regulatory organisations such as WICS and OFGEM, the OFT, planning and the associated guidelines review, 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.

[26] *Skill Needs Assessment for Active Leisure and Learning in Scotland*, SkillsActive, 2005. Based on visioning workshops in the UK.

3.2. Secondary drivers of business competitiveness

3.2.1. Globalisation

Globalisation is not considered a major factor within the industry in Scotland. In other parts of the UK, immigration and the need for transferable qualifications were raised as issues. It is mainly domestic markets that haven't attracted foreign competition. The main influence is through consumer trends and staffing.

The greatest impact of **global drivers** manifests itself in the immigration of workers for both the caravan industry and in outdoor residential domestic roles. Global drivers affect UK holiday taking, with the advent of budget airlines encouraging affordable access to foreign cities and holiday destinations. Equivalence and transferability of instructing/coaching qualifications works well in fitness with mapping to the Register of Exercise Professionals (**REPs**) but it is a major issue for the **outdoors** across Europe, and countries further afield. There are barriers to British nationals being employed in Europe, particularly in skiing and mountaineering in Austria and France.

Football is a very popular **sport**, and the transfer of skills represented by British clubs signing foreign players is an obvious aspect of globalisation. The sports goods market is also much globalised, where the requisite combination of low to moderate labour costs and manual skill exists. **Health and fitness** is generally a domestic industry, apart from gym equipment production, US dieting systems and 'keep fit' DVDs. Lessons may be learned from US health clubs and leisure centres' broad range of well-being and health activities.

3.2.2. Technological change

Technology provides both opportunities and threats to the sector.

Reaching Higher (see 3.1.2 earlier) acknowledged the current and potential impact technological advances can have within sport. I.T. is having an ever increasing role to play in modernising and streamlining services as well as contributing to the participation in sport and physical activity.

All sub-sectors highlight the major advantage of advertising and promoting themselves through the World Wide Web. It improves the delivery of member services, enables access to information and advice and provides opportunities for marketing and promotion.

Reaching Higher notes that many sports governing bodies and local authorities are currently using this to great effect with on-line membership, web-based advice, good practice guidance for clubs and their volunteers, and the sharing of information through interactive forums. In the 2005 Skill Needs Assessment active leisure, learning and well-being employers envisaged future development with on-line training sport and fitness programs. Specifically in playwork, I.T. play through on-line activities can improve children's social skills and impacts on parents' need for I.T. literacy. With the advent of hardware like the Apple iPod, iPhone and Nintendo Wii the use of software in training and exercise is increasingly accessible.

Management Information Systems are highlighted within sport and recreation, the caravans sector and health and fitness to manage and track customers. In 2010, East Ayrshire Council was introducing the CHIP (Community Health Improvement Partnership) card; a membership card that allows you to build up points with each recommended activity undertaken and trade them in for an award, as well as tracking sessions. Technology is controlling access to gyms with the innovation of Pure Gym, now open in Edinburgh – a 24-hour "no-frills" gym where entry is gained solely through a pin-code turnstile and overheads have been cut through the use of online membership and enrolment and minimal staff (none during off-peak hours). The Factory Gyms offer an eFitnessSystem™ that is an on-line set of tools designed to engage and motivate exercisers. With this system, users can capture their cardio workouts on a USB flash drive and automatically upload their data to their online personal account pages. This enables them to monitor workout progress, set personal cardio goals and participate in group challenges and team competitions set by personal trainers.

Technology is seen as an avenue for accessing young people through the methods above. Mobile phones, through using services such as text messaging, provide further innovative and cost effective methods of communication. However, it is also distracting young people. Although some entertainment technology is playing its part in increasing physical activity, games consoles and music / video entertainment is still a big draw away from it. Improvements in services offered by digital television, for example interactive choices such as playback, camera angles and extra commentary, may also draw people away from spectator sports.

Technological advances in materials used for making outdoors equipment and clothing can make it more exciting and lightweight for users. The design and construction of caravans increasingly feature all the comforts and "gadgets" people expect at home, adding to their popularity and increasing the season of holiday use[27].

3.2.3. Demographics issues

The Scottish population was 5.17 million in 2008 and is expected to rise to 5.54 million in 2033. Longer term projections show a peak in 2033 followed by a slow decline.[28] This is a revision of the 2004-based projections that forecast an earlier decline and reflects a reversal of historic net out-migration in the country.

The most important developments are in the changing age structure of the population. By 2018 the number of children aged under 16 is projected to increase by one per cent and then fall below 2008 levels in 2033. The number aged 75 or over is projected to increase 23 per cent by 2018 and is set to rise even further. The number of people aged between 16 and 24, a core element of entrants to the labour market, is projected to fall by 11 per cent.

Overall, the working age population (16-64 year old men and 16-59 year old women), in 2008 was 3.24 million and is expected to rise to 3.36 million in 2018 and eventually fall again to 3.31 million by 2033[29].

Reaching Higher (see 3.1.2 earlier) noted increased pressures on time and an ageing population are resulting in a significant decline in participation in sport. More needs to be done to attract the older market and have the right skills to instruct and coach this population. There is the additional impact of a declining supply of younger workers in a sector where they are heavily represented.

[27] *Skill Needs Assessment for Active Leisure and Learning in Scotland*, SkillsActive, 2005. Based on visioning workshops in the UK.

[28] 2008-based projections. http://www.gro-scotland.gov.uk/files2/stats/high-level-summary/j11198/j1119804.htm accessed on 11 January 2010

[29] *Projected Population of Scotland (2008-based)*, GRO Scotland, October 2009

4. CURRENT PERFORMANCE – WHAT IS DRIVING CHANGE?

There are a number of performance measures specific to the type of organisation within the active leisure, learning and well-being sector. For example, local authority multi-sport facilities such as leisure centres have statutory targets for usage of 'wet' and 'dry' facilities per 1,000 population. Playwork has performance indicators relating to service level agreements with local authorities (where applicable) and qualification levels to allow registration with the SSSC. There are also targets for the take up of programmes and levels of trained staff. The private sector elements of the sector found mainly in caravans, health and fitness and the outdoors do have more traditional performance measures related to profit and client base. Many of the outdoor businesses[30] are not very commercial in that they only wanted to make a living, not a huge profit. Their motivation is more concentrated on getting other people involved in the activities that they loved themselves – social capital.

The contributing drivers towards improving sector performance are examined in this section and include:

- Government strategies and policies
- Participation in sport
- Investment and funding sources
- Innovation
- Enterprise
- Skills
- Current economic climate.

The first of these is a major influence and was examined in section three.

4.1. Analysis of productivity drivers

4.1.1. Participation in sport

Sport is a major element of the physical activity drive for improvement to health. In 2008 the Scottish Household Survey reported 48 per cent of adults (16 years or older) had participated in sport excluding walking in the last four weeks, rising to 73 per cent including walking[31]. Participation excluding walking had dropped slightly on the previous year from 51 per cent. Participation decreases with age and males are more likely to participate than women.

Overall, recreational walking was the most common type of sport in 2007/2008, with 61 per cent of respondents participating in the previous four weeks. This is followed by swimming (15 per cent), multi gym/weights, keep fit/aerobics and cycling (all eight per cent), golf (seven per cent) and football (six per cent). Apart from walking and swimming, participation by males and females varied in many sporting activities; males participated more than females in sports such as golf, football and cycling, and females participated more in keep fit/aerobics, dancing, and yoga/pilates. The type of sport also varied by age group, with football more common in the younger age groups and bowls more common in older age groups.

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[30] *Skill Needs Assessment for Active Leisure and Learning in Scotland*, SkillsActive, 2005. SSA visioning workshop with the outdoors sector in Scotland.
[31] At least 30 minutes duration

4.1.2. Investment and funding sources

The active leisure, learning and well-being sector is supported by a range of measures to help ensure that the sector remains competitive. The mix of public, private and voluntary sectors results in a range of investment into the sector through paying customers, raising funds and direct or indirect government grants or funding. Additionally, there is the investment of time from volunteers that is an important element of the sector's success.

Public sector leisure departments sit within local authorities and leisure trusts are generally supported by local authorities. Although leisure provision is a statutory requirement for local authorities in Scotland the expected extent and standard of leisure provision is not defined and leisure is often an easy target for budget cuts in council reviews which is a particular concern when there are reports of further decreases impacting over the next 5-10 years. The **private sector** is funded by shareholders, investors and through membership of clubs. As a commercial sector, the **caravan industry** is also dependent on its own sources of investment, benefiting only from government sponsorship of tourism campaigns, and transport infrastructure. The sport and recreation and playwork sectors would not exist without a substantial input from volunteers, many of whom spend their own money on training.

With the London Games in 2012 and some of the football being played at Hampden Park, and the Commonwealth Games in Glasgow in 2014, and various other high level sporting events there is an aspiration that these will showcase **sport** and there will be a consequent increase in participation. In addition, both the Scottish government and Glasgow City Council have developed legacy plans that will capitalise on the interest in physical activity and sport and SkillsActive is working with partners to ensure that there is an appropriate workforce in place to deliver the legacy.

The **outdoors** sector reflects this mix with outdoor education generally sitting within the Education Department of a local authority, private outdoor activity providers offering to individuals and groups often specialising with tourists.

The **health and fitness** sector has benefited from government messages about health, well-being and investment in the prevention of obesity with more people taking up physical activity, mostly walking and cycling.

In addition to long term funding, there are often opportunities for project funding from the Lottery and other sources. However, the London 2012 Games are is part-funded through Lottery funding and this may impact upon other organisations dependent on it.

The main issue identified in workshops in 2005 and still appears to be relevant, is the short term approach to funding by government which does not match up to its policy aspirations. Last minute decisions and short term grants make it difficult for employers to recruit and retain staff, or to train and develop them. The sector reported general problems with staff seeking other jobs as the last year of funding approaches, leaving the project understaffed.

> "*Three year funding bands mean that we are sure that in 3 years time, we will have a new policy, a new job and a new title*".

One key issue identified for the public sector is that although it is becoming easier to access funding through partnerships there is actually little more money available in total. Alternative avenues, for example through the health agenda, are increasing access to funding but it was felt to be a shame that sport does not have direct support – this concern was also reported in the qualitative research elsewhere in the UK.

> *"isn't it a pity that everyone views sport and recreation in terms of how they can support other people's agendas and we fail to make the case for the sector in its own right"*
> Council.

There are some key funding initiatives affecting the sector.

- **Active Schools Programme: sport**scotland was provided with £24 million to roll out the programme throughout the country. This involves a new staffing network, based in local authorities, of 32 Active Schools managers with a network of over 600 co-ordinators. The aim of the Active Schools Programme is to give school-aged children the tools, motivation and opportunities to become more active in their school years and into adulthood. It also aims to recruit new volunteers and build a sustainable volunteer network.
- **Healthy Eating, Active Living:** This government plan reports a 2008-11 spend of over £56m of which £40m is new money. Over £19m of the new resources will go into early years targeting women of child bearing age, pregnant mothers and pres-chool children to improve their nutrition. A doubling of expenditure on promoting physical activity to £12m and a doubling of support for Paths to Health scheme. For the first time nearly £15m is going towards programmes of activity to support people to achieve and maintain a healthy weight.
- **CashBack**: In 2008 the Scottish government announced a new strand of its CashBack for Communities scheme to provide funding to support projects which support young people involved, or at risk from violence, alcohol, dugs or antisocial behaviour as well as support for initiatives such as drop-in services and residential, environmental and outdoor activities. These funds come from the reinvestment of proceeds of crime money. There are three governing bodies of sport in Scotland (football, rugby and basketball) who have expanded their network of development workers and coaches to work with these young people.
- **Coaching provision:** In 2007 **sport**scotland announced an investment of £2.5 million over four years to strengthen and improve coaching provision. The investment comes from the **sport**scotland Lottery funding and is providing bursary funding for 8,500 coaches across 21 sports to help new and existing coaches to undertake the UK coaching certificate (UKCC). This means that coaches can have their UKCC courses subsidised by up to 75 per cent. Unfortunately this is currently due to finish in 2011.
- **Skills Development Scotland (SDS)**: Sector employers invest in the training of their staff but one of the only sources of funds to assist with training is SDS that funds Modern Apprenticeships. Employers across Scotland have expressed a need for a more flexible offer from SDS. Modern Apprenticeships are well liked but there are a variety of restrictions in age and in sectors.
- **Go Play:** Inspiring Scotland (a national charity to improve the lives of Scotland's most vulnerable people) will manage a fund totalling £4 million provided by the Scottish government to improve play opportunities among five to 13 year-olds. The scheme will run over two years, will help improve facilities and services in areas where children have the least opportunities to develop through play. For example, through creative approaches to play using Scotland's natural environment and play workers working within the community. Voluntary groups will be able to submit funding bids[32].

4.1.3. Innovation

Innovation was not perceived to be a strong feature of the sector. Qualitative research in the UK[33] summed up the influence of innovation for SkillsActive sectors as "evolution rather than revolution". There are certainly new fashions in fitness training programmes. In sport there is a trend towards

[32] http://www.scotland.gov.uk/News/Releases/2009/08/11101002 accessed on 27 January 2010
[33] *Skill Needs Assessment for Active Leisure and Learning in Scotland*, SkillsActive, 2005. Visioning Workshops with SkillsActive Sectors in the UK

individual sports rather than team sports, with a growing interest in "extreme" sports like sky diving or "street" sports like skateboarding.

The caravan industry has probably seen more innovation in product design, with caravan holiday homes, touring caravans and motor homes equipped with all the latest gadgets (see technological drivers in section three). Development of new technologies is an area that may also offer new opportunities in sport coaching.

The most important innovations for the SkillsActive sector is in the form of improved means of communication with customers and bookings, be that text messaging to youngsters, MP3 downloads of guides, website advertising and on-line booking services, or swipe cards to measure membership use of facilities.

The health and fitness sector is innovating itself to widen its appeal through new market strategies. Some examples, mentioned earlier, were a no-frills gym experience with 24 hour access via a unique pin code and online membership and Factory Gyms that provide on-line tools to engage and motivate clients. There is also a moving emphasis towards 'softer' activities such as spa, Pilates and a closer alignment with nutrition and preventative health. The Nuffield Health Fitness and Well-being centres are the clearest example of this practice and employ well-being advisors as well as running seminars on a range of health issues.

4.1.4. Competition

The sector positions itself in the market as mainly one of improvement to your well-being either through health, enjoyment or personal development. There is an element of competition within the sector in terms of private / public pull and attracting similar target markets.

In terms of the physical activity market, **health and fitness** can face competition from the free alternative sporting activities provided by the outdoors and sport. Its private sector arm traditionally targets those who can afford gym membership fees but it continues to diversify and most recently there has been the establishment of "no-frills" gyms such as Pure Gym. The sector also faces additional competition between the local authority and private provision with the former able to compete on price and the latter on the product and service offer.

The **outdoors** and **caravans** face competition from alternative holiday activities and accommodation. Factors such as consumer trends, disposable income and personal preference all have a role to play. It faces competition from both within the UK and abroad.

The caravan industry is predominantly tourism-based. Caravan parks cater for static caravan holiday homes (owned or hired), and "pitches" for touring caravans, tents and motor homes. Its main customers include domestic tourists, European tourists[34] and activity groups/adventure schools. There is an obvious link between the latter activity/adventure customer group and the fitness, sport and the outdoors sectors.

The 2008 UK Tourism Survey suggests that of the 12.15 million trips taken in Scotland:

- Three per cent of accommodation used was in caravan-towed, campervans, motor caravans and motor homes.
- Three per cent used static caravans, not owned by the visitor
- Four per cent used static caravans owned by themselves, a friend or a relative.

[34] This is different to England and Wales who reported low levels of in-bound tourism

Overall, some 6.19 million nights were stayed in caravans, campervans and motor homes/caravans and an estimated £197 million of expenditure was spent on caravan related accommodation[35].

VisitScotland's latest 2009 figures indicate that the annual average pitch occupancy of touring caravans and camping parks has risen to 50 per cent after a relatively static period since 2006. It has performed relatively well against other forms of accommodation with only guest houses and bed and breakfast reporting a rise.

Figure 4.1.4 (a): Occupancy rates for accommodation in Scotland, 2009

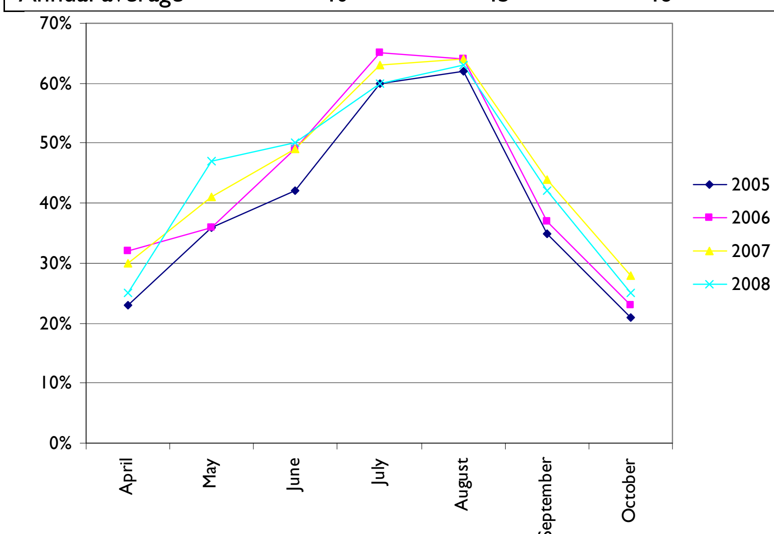
2009 Jan – August	Hotels (Room)	Guest House & Bed & Breakfast (Room)	Self Catering (Unit)	Hostel, Bothy & Bunkhouse (Bed)	Touring Caravan & Camping Parks* (Pitch)
Occupancy Annual Average	64%	50%	53%	49%	50%
% Change Year on Year	0%	+3%	-2%	0%	+1%

Period of current publication = January - June
* Touring caravan & camping pitch occupancy survey runs April to October
Source: Scottish Accommodation Occupancy Survey (Last Updated: 12/10/2009)

There has been little change in the seasonal nature of the caravan operations although in 2008 the early and later seasons were performing well compared to previous years.

Figure 4.1.4 (b): Monthly Accommodation Occupancy in Touring Caravan & Camping Parks (% pitch occupancy)*

	2005	2006	2007	2008
Annual average	40	45	46	45



*Survey of Touring Caravan and Camping Park occupancy is only conducted from April to October
Source: Tourism in Scotland 2005/2006/2007/2008, VisitScotland

The outdoors industry is a mixture of public sector provision through local authorities mainly providing services for schools and social work and private businesses providing for private groups and tourists who want to walk, climb, cycle with a guide or receive coaching in canoeing, sailing or other activities. In the main, the businesses are small with a core staff and enhanced with seasonal workers or operating as sole traders or freelancers. Exceptions to this would be PGL and other large providers with multiple sites.

[35] TNS Travel & Tourism, *The UK Tourist: Statistics 2008*, Tourist boards of England, Scotland and Northern Ireland and Visit Wales, 2008

There is optimism in the outdoors sector that individuals are taking more interest in their environment and in healthy pursuits like walking and cycling. National strategies encouraging increased participation in physical activity are contributing towards this. The contribution of the sector to tourism is reflected in VisitScotland figures below. Hiking / hillwalking / rambling/ other walking are shown to be of particular importance to Scotland accounting for 47 per cent of holiday trips, performing well against the other visitor activities.

Figure 4.1.4 (c): UK Visitor Activities undertaken in Scotland‡

	UK Holiday Trips
Hiking/hillwalking/rambling/ other walking	47%
Heritage, architecture, literature etc.	23%
Shopping	14%
Touring/sightseeing	13%
Wildlife watching & zoo park visits	9%
Watching performing arts (including cinema)	8%
Adventure sports	4%
Fishing	4%
Golf	3%
Cycling	3%

‡ 3 year average 2006-2008

Source: Tourism in Scotland 2008, VisitScotland

Competition for staff

Overall, 2005 workshop participants saw the sector as fortunate in being an attractive potential workplace. However, many new applicants seeking to enter the industry are not prepared for generally low-skilled, low pay, entry-level positions. Recruits require experience and are not coming to employers already equipped with relevant skills so they must first gain that experience. The most frequently cited skill shortages in new recruits affecting their employability were “people” skills, particularly customer service. Low paid roles can be a notable disadvantage in the rural areas where high housing costs add to the disincentive for workers in the SkillsActive sector.

Graduates emerging from colleges and universities have high expectations of what their jobs will involve. In many cases, reality does not live up to expectations, with the result that many qualified people may leave the profession early. The second issue is a lack of practical / vocational qualifications amongst graduates, resulting in graduates being obliged to start at the bottom and work their way up. This was seen to decrease diversity at the entry level.

> *“Young people want to start at a higher level. We need to sell the concept of career development.”* Council.

Reaching Higher (see 3.1.2 earlier) reported that research shows that college and university courses do not always equip young people with the skills and knowledge to do the job. It noted a need to review continuing education provision for existing staff and as in the case of volunteers, ensure that new arrangements are responsive to the changing demands of sport.

One of the priorities identified by workshop participants for the playwork sector is to **avoid being absorbed by the childcare sector** as play, as noted earlier, overlaps with activities in the childcare sector. There is a small core of experienced workers who tend to be older in playwork, supported by younger industry entrants. Roles within the sector were reputed to be relatively poorly paid and of a part-time nature. There was also felt to be a limited career structure in the sector.[36]

Entry level staff are often recruited with no qualifications; however, there is a requirement for support workers to have an SVQ level 2 in Playwork for registration with SSSC. This means that employers have to fund or find the funding from local authorities to ensure that their support workers are trained. This is also the same for all the levels of workers. Consequently, there is a high turnover of staff at entry level. And once recruits have achieved a qualification, there's a feeling that they often leave for better paid positions elsewhere in the childcare sector.

Core skills form a key part of recruitment decisions, although there is a lack of problem solving, team working and communication skills in the under 25 year old labour pool.

The **caravans** sector is slightly different in that it is predominantly family run businesses, and only the larger parks undertake large scale recruitment. Their labour requirements are often met from local communities who understand the seasonal nature of much of the work. Their main skills requirements are core skills relating to customer service and tourism skills. They feel they have no major qualification requirements, apart from Gas Safe recognised training in LPG (Liquid Petroleum Gas) installation which is required and new recruits with this qualification are becoming harder to find. The industry would welcome courses which are specifically tailored for the caravan sector's needs so recruits can be trained efficiently.

The sector also has a highly seasonal nature that results in a high turnover of staff. This impacts on training (due to short term nature of posts there is a tendency not to invest in them) and is also often reliant on students.

Although there are clear National Occupational Standards (NOS) for some qualifications there is a proliferation of providers and courses, of varying degrees of sectoral relevance which complicates the picture for employers to know who are the right staff. The visioning workshop for **health and fitness**[37] outlined a desire for NOS which is likely to be linked to the Physical Strategy and new standards that will be needed for the emerging occupations in promoting physical activity to the inactive.

There is increased recognition of the Register of Exercise Professionals (REPs) which has seen the mapping of HNDs to REPs level 2. More Scottish training providers are delivering courses endorsed by SkillsActive and count as points towards REPs CPD that are required to remain on the register. By comparison with England, it is interesting to note that the Register of Exercise Professionals has achieved much greater clarity for the fitness sector in terms of NOS, endorsed training providers and recording staff qualifications, which can be checked by employers and public alike. The register has been an important driver to professionalising the sector in England, and has already attracted 1,356 members from Scotland in 2009.

[36] This was supported by SSA visioning workshops in 2005 with the playwork sector reported in *Skill Needs Assessment for Active Leisure and Learning in Scotland*, SkillsActive, 2005.

[37] *Skill Needs Assessment for Active Leisure and Learning in Scotland*, SkillsActive, 2005. Visioning workshops with the sport sector in Scotland.

4.1.5. Enterprise

Like private investment, the degree of enterprise in the SkillsActive arena depends entirely on the commercial structure of each sub-sector. Growth opportunities exist through the business drivers examined earlier and are dependent on investment identified earlier.

The **caravan industry** in Scotland is dominated by small family-run businesses. With the exception of the caravan clubs and the major group operators, supply in the caravan industry is diverse with a predominance of small traders. The overwhelming majority of operators (95 per cent) have fewer than five parks according to the BH&HPA Caravan Holiday Homes Supply Chain Survey 2005.

Caravan parks are licensed by local authorities, and any development requires planning permission. Our UK visioning workshops[38] observed that there are very few new permissions these days so physical expansion and growth of existing caravan parks is controlled, and new start-ups are restricted. Growth largely stems from existing operators developing new markets within accommodation for outdoor activities, young families and the increasingly important "grey" market, extending the season or concentrating on the more profitable areas like selling static caravans where it is easier to plan income generation.

The **health and fitness** sector is a rapidly changing environment as private clubs and chains are taken over or newly opened and trusts replace local authority management. By the end of 2009 it was expected that all local authority sports and fitness sites across the UK will be managed by a local trust[39] and an increase in leisure trusts has been observed in Scotland. Cannons was the last big chain to be taken over by Nuffield Health in 2007 and has two sites in Scotland.

In 2007, the **Fitness Industry Association** provided information on private health and fitness clubs and public facilities. Their report shows Scotland had 507 clubs (nine per cent of UK total) in March 2007 with a total membership of almost 545,000. This equated to a small 1.5 per cent decrease in private clubs but seven per cent rise in public health and fitness facilities (compared to a two per cent and five per cent rise, respectively, in the UK) in the past year.

Figure 4.1.5 (a): Performance of health and fitness facilities in 2007

		N		% of UK total		2006 - 2007 change			Market value	
Region	**Clubs**	**Members**	**Avg members per club**	**Clubs**	**Members**	**Members**	**Club openings**	**Club closures**	**£**	**% of UK**
Scotland Total	**507**	**544,639**	**1,074**	**9%**	**8%**	**n/a**	**14**	**12**	**243m**	**7%**
Private	204	265,756	1,303	7%	6%	-1.5%	4	9	150m	6%
Public	303	278,883	920	12%	10%	7.3%	10	3	93m	10%
UK Total	**5,714**	**7,155,637**	**1,252**	**100%**	**100%**	**n/a**	**232**	**178**	**3,564m**	**100%**
Private	3,117	4,397,232	1,411	100%	100%	2.0%	126	138	2,580m	100%
Public	2,597	2,758,405	1,062	100%	100%	4.6%	106	40	984m	100%

Note: 31/03/07 is compared to 01/01/06
Source: FIA 2007 State of the UK Fitness Industry report

Whilst each sub-sector has its own strategies for success, there are some areas of commonality in seeking opportunities for growth.

[38] *Skill Needs Assessment for Active Leisure and Learning in Scotland*, SkillsActive, 2005. Visioning workshops with caravan industry experts in the UK.
[39] http://www.theleisuredatabase.com/insight/march-2009-fitness-industry-under-the-microscope accessed 9 March 2009

All sectors with publicly-funded provision see a partnership approach as being vital to their ongoing development. At a local level these partnerships are predominantly with: health authorities, community groups, voluntary groups and charities and community planning partnerships.

The sport and recreation and health and fitness sectors will have common opportunities across their target groups (as noted earlier) and key performance indicators, particularly relating to health related targets mainly coming out of the national strategies covered earlier. Whilst the playwork sector also sees partnership as important, these partnerships are focused mainly on childcare and education groups.

The **playwork** sector also has opportunities for growth through the professionalism of its workforce and this is being achieved through regulation via SSSC where the playwork workforce has to be registered against a benchmark framework (as seen earlier in the drivers section). The sector also aims to increase provision of special needs playwork and outdoor adventure based play and to engage with the 12-14 age group in a more effective manner. The sector intends to further develop its role in wraparound provision.

Notable areas of growth are around the health agenda and aim to increase participation in physical activity that cuts across sport and recreation, health and fitness, playwork and the outdoors. Such areas include attracting a wider range of participants including women, children, and hard-to-reach groups and meeting the needs of an ageing population.

Further opportunities for improvement will be facilitated by How Good Is Our Culture and Sport? (HGIOCS?) - a quality improvement framework (QIF) that has been drafted to assist local authorities and other service providers to evaluate the quality, effectiveness, efficiency and inclusiveness of their culture and sport provision. A partnership of local authority bodies, HM Inspectorate of Education, national culture and sport bodies and Scottish government has been developing the various elements of the draft QIF, and is now planning for trials of the framework, starting in 2010. It is hoped that other sector-specific quality improvement tools will be added subsequently within the QIF. A sector tool for sport provision is one of the possible additions. It is planned that a final version of HGIOCS? will be launched in the first part of 2010.

In 2005, the **sport and recreation** sector visioning workshop saw the growth of public private partnerships for building new school facilities as an opportunity to develop. The plan was for more use to be made of community schools to increase access to sport and recreation by all members of the community[40]. However, SkillsActive has had some recent reports of community and voluntary groups' inability to afford to hire these new facilities because the initial contracts did not take this use into account.

Sport and recreation employers in 2005 also expressed the hope that in the future there will be a focus on closer links between education providers and sport, ensuring that qualifications meet skill demands from employers.[41]

Private sector employers[42] in the **outdoors** in 2005 were confident that the outdoors was being "re-recognised" because of an increased interest in the environment, health and an interest in short leisure breaks in Scotland. They reported that people, particularly older people, were fitter and had more leisure time and were prepared to try activities that they had always wanted to do. In the future they anticipated a development away from "taster sessions" into taking up activities in more depth and with greater independence.

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[40] *Skill Needs Assessment for Active Leisure and Learning in Scotland*, SkillsActive, 2005. Visioning workshops.
[41] ibid
[42] *Skill Needs Assessment for Active Leisure and Learning in Scotland*, SkillsActive, 2005. Visioning workshops with the outdoors sector in Scotland.

For the public sector, employers were concerned about the link between Lottery funding and growth. Until the inception of the Lottery there had been a decline in provision and in many cases a decrease in the full-time positions with staff being taken as needed. They hoped that the proposals for a “Curriculum for Excellence” would acknowledge the role of outdoor education and recreation and that this would give them more stability and recognition.

Reaching Higher also noted the need to identify more outdoor sporting and recreational opportunities, within parameters recommended by the Scottish Outdoor Access Code, through working in partnership with Scottish Natural Heritage, the Forestry Commission and others.

5. ECONOMIC CLIMATE

The effect of the current recession on the active leisure, learning and well-being sector is likely to vary depending on the public sector, private or charitable/voluntary status of organisations. 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.

For **sport and recreation**, the main issues include:

- Increased cost of coaching qualifications for volunteers following the introduction of the UK Coaching Certificate;
- Falling average profits reported by sports clubs between 2007 and 2008[43];
- Loss of endorsements or sponsorship deals for teams, athletes/professionals (e.g. Diadora, the sponsor of the national Scottish team, going into liquidation[44]).

Despite these challenges, the sector is holding up quite well.

Early indications of the impact of the recession from the **health and fitness** sector showed it was resilient. The Leisure Database Company reported leisure management contractors, trusts and in-house teams all seeing strong growth in a range of sports participation, fitness membership and income. It fed back from the Scottish recreation managers meeting in mid-February, who had seen like-for-like sales and membership growth in January 2010. The article said:

> "Renfrew, who hosted the meeting, were delighted, declaring an average 28 per cent growth in fitness members across its four sites and February was ahead of target despite the snow".

Edinburgh had seen a 13 per cent growth in membership numbers and similar stories of some growth were reported elsewhere.[45] This does not report on the private sector performance but the UK reports indicated it had weathered the economic climate well[46].

However, the health and fitness sector is not recession proof and key challenges may include:

- Declining membership numbers as a result of reduced disposable income;
- Shifting patterns of participation – e.g. shift from private club membership to public sector 'pay as you go' leisure facilities;
- Competition – there is some evidence that clubs are adapting their sales offer and 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.

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[43] *UK Survey of Sports Clubs*, Central Council of Physical Recreation (CCPR), 2009
[44] http://scotzine.com/2009/07/10/scotland-kit-manufacturer-diadora-go-into-liquidation/ accessed 28 January 2010
[45] http://www.theleisuredatabase.com/insight/march-2009-fitness-industry-under-the-microscope accessed 9 March 2009
[46] http://www.theleisuredatabase.com/news/news-archive/resilience-in-the-fitness-sector accessed 28 January 2010

Research undertaken by SkillsActive in 2009[47] highlighted specific challenges for **outdoors** employers in the current economic climate, which included:

- Difficulties in sustainable funding with cutbacks reported;
- Rising costs;
- Difficulties attracting and maintaining clientele where outdoors activities are directly associated with the availability of disposable income.

Indications from Scotland, suggests that the outdoors sector, mostly private and small operators, has had a good business year. One operator reported that it was the best year for five years and he credited this to families having their main holiday in the UK but wanting to be involved in a physical activity[48]. Outdoors bookings from local authorities or schools are not likely to be resistant to recessionary pressure as the local authority budgets tighten, but operators could benefit from trends to holiday at home. There have been similar reports from the caravan sector. The VisitScotland Winter White Campaign sought to tap into the year-round 'staycation' market at a time when 15 per cent fewer Brits were taking holidays abroad.

Although some areas of the caravan industry, such as caravan parks, were reporting positive effects from people seeking better value holidays at home the manufacturing and registration of new caravans is more at risk. This has a knock-on impact for dealers and caravan parks in terms of sales commission. The second-hand market is reported to be faring better. However, if caravanning maintains its popularity this may reverse the negative impact on manufacturers from the current economic climate.

Anecdotal evidence also suggests that the playwork 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. There is also an anticipation of major cuts in the public sector that will take effect over the next couple of years and impact across the sector.

5.1. Rising costs

Many of our settings depend on membership fees and class fees. The recession has bitten into this with some people downsizing their membership to a cheaper provider. Local authorities and leisure trusts are being hit by the decrease in public sector budgets. We know of local authorities that are decreasing their staff and contracting opening hours. The playwork sector was reporting a problem with cash flow as parents were slower paying their bills; also we have reports of less call for summer holiday provision where parents were supplementing the formal provision by using relations and friends to care for their children.

The Scottish Employer Skills Survey 2008 identified cash flow (11 per cent of employers) and costs (costs/prices reported by six per cent and labour costs by four per cent of employers) amongst the main challenges anticipated over the next 12 months. Fewer employers in the active leisure, learning and well-being sector reported these problems than seen across all industries.

The whole sector has also been affected by rising operating costs. In recent research[49] 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.

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[47] *The Outdoor Census*, SkillsActive, December 2009 (included 40 Scottish employers)
[48] SkillsActive sought the views of employers on behalf of the Alliance of Sector Skills Councils in Scotland to collect information on the effects of the recession in 2009
[49] *The Outdoors Census*, SkillsActive, December 2009

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

- Increasing energy prices and charges for utilities which impact severely on operators whose facilities include swimming pools, threatening their viability;
- Increasing fuel and transport costs which are an issue across the sector including 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 cost and availability of facilities for two thirds of sports clubs without their own facilities[50];
- 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.

Reaching Higher (see 3.1.2.) also reported on the extent of the ageing stock of built facilities and highlighted that significant investment is required. However, it questioned whether all the facilities were necessary. Multi-sports facilities demand large outlays to build and maintain, particularly those that have swimming pools and sport and fitness equipment. **sport**scotland's "Ticking Time Bomb"[51] report identified the cost of maintaining and replacing existing swimming pools in Scotland. Maintenance is generally conducted on a rolling renewal programme, but because of a decrease in leisure budgets maintenance programmes are generally thought to be inadequate. The result is that buildings and plants are often in a poor state of repair. Additionally, customers have higher expectations now than they had in the past.

There are examples across Scotland of where elected members are reluctant to close facilities so the stock is being added to with new facilities, adding to the cost, but with actual budgets being reduced. These same facilities can be costly to run, particularly those with swimming pools that have been affected by rising fuel costs.

5.2. 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 reduced 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;
- 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.

[50] *UK Survey of Sports Clubs*, CCPR, 2009
[51] "*Ticking Time Bomb*", **sport**scotland, 2001

Research undertaken by SkillsActive[52] identifies that there are particular recruitment difficulties and skills issues facing employers in the sports, fitness and outdoors sub-sector, with particular job roles considered hard to fill:

- Sporting officials (paid and voluntary)
- Coaches, teachers, instructors and activity leaders (paid and voluntary)
- Operational help (volunteers).

Research undertaken to explore the impact of the recession[53], 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[54]. Customer services research, undertaken in 2008 suggests that ensuring good levels of customer service will be of particular importance 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 *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 SSC 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.

[52] *Sport, Fitness and Outdoors Employment Survey*, SkillsActive, 2006
[53] CBI, SEEDA
[54] *World Class Customer Service…for 2012 and Beyond*, SSC Cluster Group, December 2008

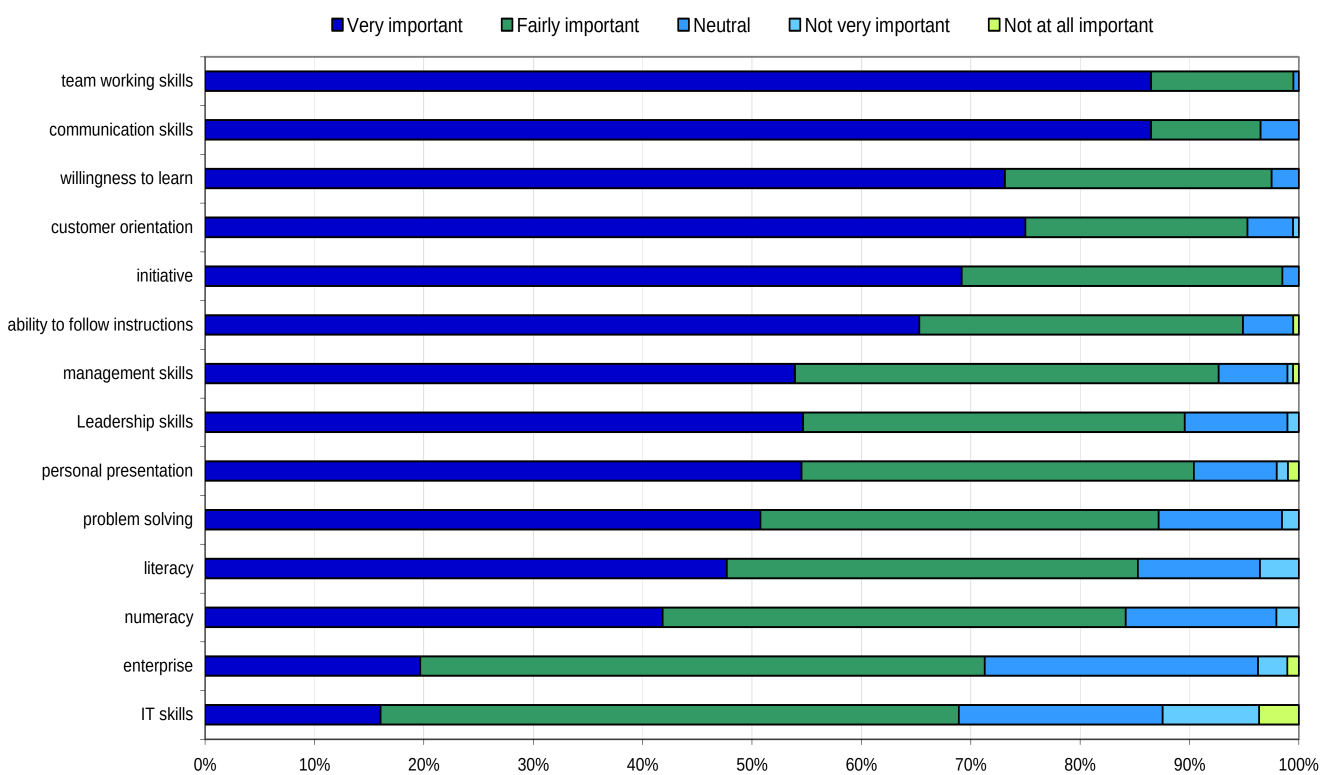
6. CURRENT SKILL NEEDS

This section looks at the implications of developments in the sector for skills demand. It contains a detailed discussion of current skills gaps and shortages. There is an emphasis on this because skills gaps and shortages are significant issues for businesses affected. Their existence can have significant implications, both for individual companies and for the industry as a whole. They can create difficulties of meeting quality standards, loss of orders to competitors, difficulties in introducing new working practices and new products and services and increased operating costs.

6.1. Character/composition of current skills needs

SkillsActive commissioned research in 2004 to examine the importance of skills across the active leisure, learning and well-being sector. This provides a broad overview of the sector and reflects its high customer interface. Team working and communication skills were both identified as very important by 87 per cent of all organisations. All skills were considered of some importance (very or fairly) but those skills rated as relatively less important by sector employers include literacy, numeracy, enterprise and I.T. In terms of the most commonly cited skills that are very important there is little variation across sub-sectors.

Figure 6.1 (a): Level of importance for skills in active leisure, learning and well-being sector



Base: all organisations
Source: Glasgow Caledonian University, 2004

The Caravan Parks Industry 2004 research also identified customer related skills and those pertaining to safety with communications most frequently cited as very important (87 per cent) followed by customer service (85 per cent) and maintaining safety (83 per cent).

6.2. Recruitment, vacancies, skill shortages and skills gaps

Skills shortages occur when businesses cannot recruit enough people who are appropriately qualified, skilled or experienced. Skills shortages are deemed to exist when employers have a vacancy which they are finding hard to fill and the reasons for it being hard to fill are related to shortcomings in the skills, qualifications or experience of applicants.

In the last 2-3 years about 64 per cent of active leisure, learning and well-being employers have recruited staff compared to 72 per cent across all industries. Most commonly, the last recruited roles were in elementary and personal service staff and to a greater extent than for all industries.

The Scottish Employer Skills Survey 2008 (SESS) reported 18 per cent of employers with vacancies and 55 per cent of employers with vacancies that found them hard to fill. This compares to SkillsActive commissioned research in 2004 where 31 per cent of employers had hard-to-fill vacancies[55]. The 2008 vacancies made up an estimated four per cent of employment, similar to the three per cent found across all industries. The vacancies that were hard to fill accounted for 34 per cent of the total, lower than all industries where half of vacancies had recruitment problems (50 per cent).

Figure 6.2 (a): Extent of vacancies and recruitment difficulties, 2008

	% of employment	
	Active leisure, learning and well-being	All industries
All vacancies	4%	3%
Hard-to-fill vacancies	1%	2%
Skill shortage vacancies	-	1%
	% of establishments	
	Active leisure, learning and well-being	All industries
Vacancies as % of all establishments	18%	18%
Hard-to-fill vacancies as % of all with vacancies	55%	57%
Skill shortage vacancies as % of all with hard-to-fill vacancies	-	49%

Source: Scottish Employers Skills Survey 2008

Although vacancies were highest in personal service staff followed by elementary staff, hard-to-fill vacancies were most evident in associate professionals (includes roles such as instructors, coaches, sports players and officials) followed by personal service (includes such roles as playworkers, leisure assistants and stewards) and elementary staff (includes such roles as cleaners).

The SESS 2008 data on reasons behind recruitment difficulties is not robust enough to report. However, previous research has cited such reasons as attractiveness of the job: a lack of financial incentives and the shifts / unsocial hours. Skill shortage reasons i.e. lacking the relevant qualifications, skills or experience, were also cited.

Playwork is finding it difficult to recruit staff because of low pay and part-time hours, but workers still have to be qualified appropriately for registration purposes. Out of school care centres are increasingly finding it difficult to employ new staff who have the qualifications for registration. Also the funding for new staff to become qualified is difficult to come by in many local authorities.

[55] *Workforce Development for the Active Leisure and Learning Sectors: Labour Market Intelligence and ICT/Distance Learning,* Glasgow Caledonian University for SkillsActive, April 2004

In the 2004 Glasgow Caledonian University research employers did not necessarily think that there were many hard-to-fill vacancies in the sectors but highlighted that a lack of financial incentives was a barrier, especially higher up the career ladder.

Hard-to-fill Vacancies: Occupations

The Glasgow Caledonian University 2004 study provides some insight into difficult-to-recruit roles. Respondents where asked to list and rank up to three roles which had suffered hard-to-fill vacancies enabling some inferences to be drawn as to which occupational groups are having problems and why.

The core roles identified as hardest to fill were sector specific roles of coaches, instructors, activity leaders and playworkers and the operational staff. They were also ranked as the most acute job areas that respondents listed as hardest to fill, respectively. This appears to be true for all sub-sectors.

The most challenging types of employment to recruit for were part-time and seasonal posts. This was consistent with the responses from the interviewees who, in particular, cited the low pay and unsociable hours for operative positions. Further examination at sub-sector level results in a very small base but indicates that this is common across them all. Respondents from the sport and recreation and health and fitness sub-sectors also found full-time vacancies an issue.

6.3. Skill gaps

A skills gap is when a worker does not have sufficient skills to meet the business requirements for the role. The SESS 2008 reports 18 per cent of employers are experiencing skill gaps in their workforce which is higher than the 13 per cent reported in 2006 but slightly lower than the 20 per cent all industry average. Typically, employers were making some effort to improve the proficiency of the nine per cent of staff lacking skills. The density of skills gaps is highest in elementary and administrative staff.

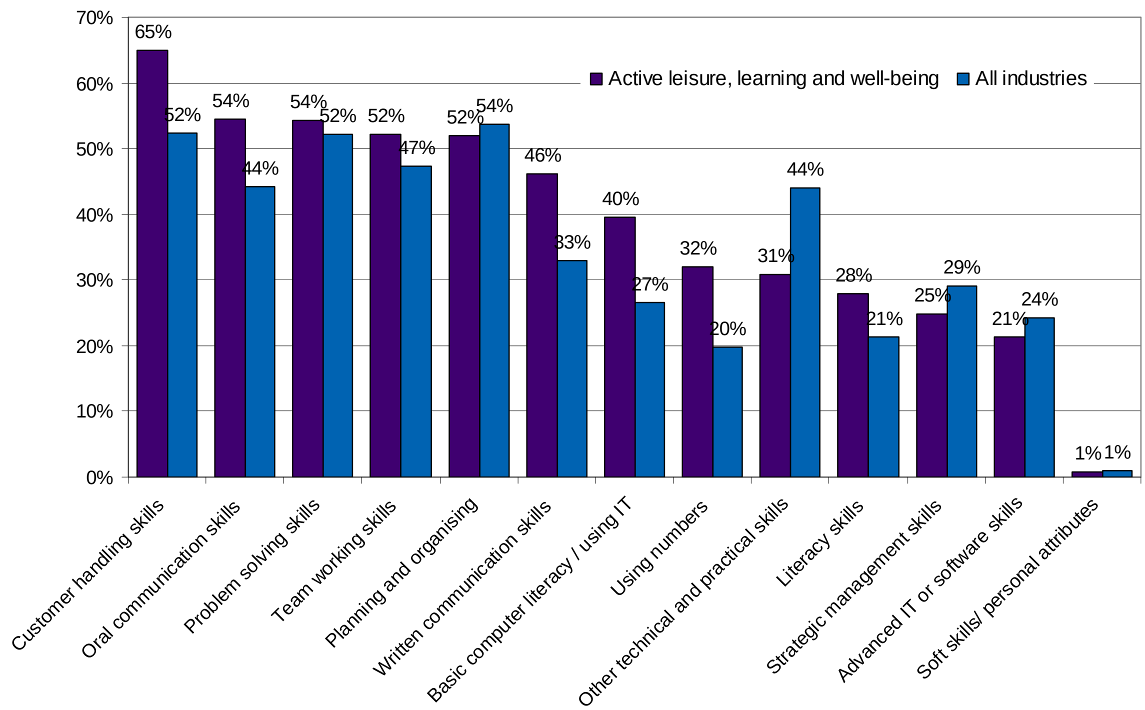
The causes of skill gaps were most commonly identified as not being in post long enough (74 per cent of employers). Half of employers attributed it to insufficient training and development for staff, more commonly than for all industries (50 per cent compared to 35 per cent). This was followed by training programmes that were only partially completed although this was less of an issue than for all industries (45 per cent compared to 47 per cent all industries). Recruitment problems and high staff turnover were also more common to active leisure, learning and well-being than all industries.

However, skill gaps were having a greater impact on employers in active leisure, learning and well-being than seen across all industries. A major impact was cited by 24 per cent of employers and 62 per cent of employers said it has a minor impact on the business performance (compared to 16 per cent and 57 per cent across industries). The impacts noted were most commonly difficulties in meeting customer service objectives, difficulties meeting the required quality standards, increased operating/ running costs and delays developing new products or services.

The skills that are most commonly cited as lacking in the active leisure, learning and well-being workforce are customer handling skills (65 per cent compared to 52 per cent of employers across all industries), oral communication skills (54 per cent compared to 44 per cent across all industries), problem solving skills (54 per cent compared to 52 per cent), team working skills (52 per cent compared with 47 per cent); and planning and organising (52 per cent compared to 54 per cent). These were the same skills reported in SESS 2006.

Literacy and numeracy is reported by fewer organisations as a skill gap, however, it is a greater problem for the active leisure, learning and well-being employers when compared to the average for all industries. Learning difficulties, notably dyslexia, are reported by employers and anecdotal evidence suggests the outdoors has a higher percentage of dyslexic staff. This is less of a problem in outdoor instructor roles but becomes more acute in progression to management.

Figure 6.3 (a): Skills that need improving



Base: employers reporting skill gaps
Source: SESS 2008

Retention and labour turnover

Staff turnover rates vary across the country in urban and rural areas and depend on the level of the job. Work on the Sport 21 workforce (KKP research) revealed that there was a higher staff turnover in some job categories at that time than the previous three years.

Figure 6.3 (b): Average number of years that a member of staff in an urban area stays in post

	Number of years	
Job category	**Current**	**3 years ago**
Sport specific development officer	5 - 10	10 - 15
Sports development officers (general/community)	3	3 - 7
Coaches, instructors and activity leaders	2 – 3	4 – 6
Sport/recreation/swimming facility managers	10	10

Source: Extract from the KKP Sport 21 (2003 – 2007) Workforce and Training Needs Report addendum (2005)

The visioning workshops in 2005 indicated, principally across playwork, sport and fitness, that there is a perception that jobs within the sub-sectors are low paid with poor working conditions. In sport and recreation there is a particular problem with the frequency of three year contracts leading to staff looking for another job after only one year in post. These can relate to the specific tasks that some jobs involve and the nature of shift working that can be required. This means that, at entry level jobs, there is a high turnover of staff as people find out that the job does not meet their expectations, or that there can be difficulties recruiting in the first place.

Skills requirements

'Technical' skills needs

Technical skills can be defined as those skills which are specific to the job role in question, while generic skills include skills which are common to a number of different roles, e.g. coaching in a given sport is a technical skill while communications is a generic skill.

The Glasgow Caledonian University 2004 study asked respondents to list the top three most acute skills shortages; technical skills ranked in the top three. It was ranked first for the outdoors.

Figure 6.3 (c): Ranking of most important skill requirement

Most important skill required; ranked					
	Active leisure, learning and well-being	Sport and recreation	Playwork	Health and fitness	The outdoors
Communication	1st	4th	1st	1st	2nd
Teamwork	2nd	2nd=	2nd	3rd=	4th=
Technical	3rd	2nd=	3rd	3rd=	1st
Customer orientation	4th	1st	7th=	2nd	3rd

Base: 193 most important mentions
Source: Glasgow Caledonian University, 2004

There was a general belief that it was difficult for the industry to determine the difference in quality and standards between some of the sector specific technical skills and qualifications, partly because of the expansion of the sector and range of technical qualifications available. The interviewees from across the sectors did re-iterate that the softer skills were a shortage for all the sub-sectors, one which employees need to demonstrate is that they understand that they are part of a service sector.

Technical skills are particularly mentioned in the outdoors because the instructors need a personal proficiency in an outdoor sport like climbing or canoeing etc before they can work in this sector. Another essential qualification mentioned by the outdoors visioning workshop for the Sector Skills Agreement in 2005 was a license to drive a minibus, for which there is also a minimum age requirement.

The outdoors[56]

The key technical qualifications for the outdoors sector are vocational:

- S/NGB qualifications at level 1,2 and 3 are vital to instructor / coaches;
- APIOL – Accredited Practitioner of the Institute of Outdoor Learning;
- SVQ delivered in the workplace;
- Risk assessment
- Health and safety

usually included in a SVQ;

[56] *Skill Needs Assessment for Active Leisure and Learning in Scotland*, SkillsActive, 2005. Visioning workshops with outdoors employers 2005 in the UK.

- Minibus driving (for off site activities) at a minimum age of 21 years;
- First aid;
- Non-S/NGB skills (no clear governance, so often taught in-house): raft building, gorge walking, co-steering, rope course management, mountain biking, quad bikes;
- Team building;
- Problem solving and challenge activities;
- Co-operative play activities.

Some job adverts specify a degree but a SkillsActive project to get Mountain Leader Training Scotland Winter Award mapped to the Scottish Credit and Qualifications Framework resulted in it levelled at level 9 and of comparable difficulty to a university degree.

Playwork[57]

There are many formal qualifications relevant to playwork in Scotland, from support worker level through to lead practitioner level. Some of these relate solely to playwork, and some relate to playwork and early years. There are also some qualifications in preparation at SCQF level 9 which will be suitable for playwork lead practitioners

Qualitative research at SkillsActive employer consultation events in 2005 indicated what was specifically required for the sector. These included:

- Playwork specific skills and qualifications, particularly to enable workers to make the transition from other childcare sectors into playwork. For example, transitional modules for playworkers entering the sector from related professions, such as childcare, or to allow playworkers to progress into other childcare fields';
- An understanding of the values and principles of playwork. Including playwork training or modules for trainers and assessors to learn playwork specific skills and knowledge;
- Business and management skills: specifically leadership, partnership working, marketing and fundraising;
- More staff training to level 2 and level 3;
- Higher level qualifications e.g. foundation degrees for senior practitioners.

Respondents to the Dimensions of Holiday Playwork survey in 2005 stated that they need training in:

- Higher levels of playwork (this is a difficulty for some who work only seasonally but who would like to be better qualified);
- First aid;
- Health and safety;
- Child protection;
- Activities for children;
- Caring for/playwork with different age groups.

Employers attending SkillsActive employer consultation events in 2005 agreed basic I.T. skills were not significantly important and said that for face-to-face playworkers and playwork assistants it was more important to have practical skills and an aptitude for working with children than I.T. skills.

[57] *Skills Needs Assessment in the UK: Playwork*, SkillsActive, 2005

However, to progress in playwork careers, I.T. skills are required for marketing and fundraising and by supervisory and management positions, such as for budget control.

Scotland agreed with the UK findings identifying requirements in the knowledge and understanding of:

- Playwork principles;
- Children's rights;
- Child development;
- Supporting children's play, including health and safety;
- Building relationships;
- Management and administration areas of project management, staff appraisals and personal development, book keeping and accountancy, recruitment, marketing and fundraising.

Sport and recreation[58]

The UK visioning workshop for the sport sector in 2005 identified technical skills requirements in the areas of coaching and officiating.

Coaching - Technical Skills:

- Sport specific skills and knowledge
- Methods of delivery - Performance / Development / Quality.

Qualifications as proxy for skills:

- UKCC or governing body coaching awards
- Many will be affiliated to the respective International Federation (IF) e.g. RYA / PADI
- Degree (not necessarily in sport) / Diplomas.

Officiating – Technical skills

Predominantly knowledge of:

- NGB rules and respective roles, sanctions and disciplinary actions
- International Federation rules.

Qualifications as proxy for skills:

- NGB + International Federation qualifications in officiating
- Spectator safety.

Health and fitness[59]

The SkillsActive UK Visioning workshop in 2005 examined technical skills required by the sector.

Specific technical skills identified included:

- Specialist skills – accounting, database management, reporting, sales, marketing, finance and human resources;

[58] *Skill Needs Assessment for Active Leisure and Learning in Scotland*, SkillsActive, 2005. Visioning workshops with the sport sector in the UK.

[59] *Skill Needs Assessment for Active Leisure and Learning in Scotland*, SkillsActive, 2005. Visioning workshops with fitness employers in the UK.

- Management skills: planning, reporting, evaluating, managing people, creating income stream, management of outcomes and outputs;
- Supervisory skills.

Statutory requirements:

- Health and safety;
- First aid;
- National Pool Lifeguarding Qualification (NPLQ) for swimming pool attendants.

Skills identified that specifically require development:

- Reception: keen to develop a qualification within industry – larger companies can train in-house but smaller companies will not. It is important to the industry due to the high customer interface;
- Administration: a key role. Diversity in membership databases negates the requirement for a qualification – in house training is the most effective route;
- There is a role for a customer service related qualification;
- Management: professional management qualification for the industry covering managing people, revenue, facility to facilitate progress through specific technical management to general management level;
- Fitness managers and studio managers: there is a gap in National Occupational Standards (NOS) for supporting these 'home-grown' managers;
- Heads of departments usually have the technical skills so club managers and general managers do not have the same level of requirement;
- Level 2 and level 3 fitness instructor and personal trainer courses.

The Register of Exercise Professionals has defined levels of skills that are outlined in the Framework in annex four.

Caravans[60]

Technical Skills needs include:

- Gas Safe LPG
- Tourism skills
- General maintenance
- Trade specific – builders/plumbers.

Sourcing Gas Safe engineers can be difficult, especially in relatively isolated areas. There is a shortage of skilled trades people such as builders, which is particularly evident in the Highlands.

Businesses pay for training themselves, and in the case of Gas Safe training, it can be expensive (£400 per training course).

Core skills are key, especially relating to customer service/ communications. People need tourism related skills and a sound knowledge of the local area.

[60] *Skills Needs Assessment in the UK: The Caravan Industry*, SkillsActive 2005

'Generic' / cross sector skills needs

Communication and teamwork ranked as the two most important generic skills, with customer orientation and willingness to learn close behind.

The Glasgow Caledonian interviewees all highlighted the importance of communication and personal skills in dealing with the public as the two main areas of importance for the sector. Customer service was ranked in the top half and seen as being integral to good service delivery. There was even a view that employers preferred to recruit applicants with good generic skills based on the belief that technical skills could be acquired through training but that personality could not be taught. More recent anecdotal evidence through SkillsActive's work reports that several employers recruit for attitude and train for skills.

> *"People skills are important. It is those personal skills which are vital in delivering a service".* City Council

Some skills, e.g. problem solving and I.T. skills were seen by fewer as being very important. Literacy and numeracy, although mentioned least, still registered on the scale.

Core skills

Core skills are a major requirement across all of SkillsActive's sub-sectors and are defined by the Scottish Qualifications Authority (SQA) as:

- Communication
- Numeracy
- Problem solving
- Using information technology
- Working with others.

Although employers are not necessarily aware of the SQA's core skills, the skills that they report that they need are often closely aligned to these core skills.

Across all sectors, it was felt that there was a lack of core skills, particularly among the under 25 age group. The ability to communicate effectively with customers is identified as key in all roles but it is lacking amongst new entrants. Employers reported that new entrants' ability to communicate with customers was poor. Specifically, it relates to the ability to speak with customers, providing the information they need and enhancing their experience of visiting a facility or using a particular service.

This gap was most evident in entry level positions, and yet these positions can be very much customer facing based, e.g. lifeguards, instructors and receptionists.

Core skill competencies are going to become even more important as partnership working increases and employers rely on staff to work with people in other fields, allied to overall higher levels of customer expectations. In particular, it could be expected that **communication, problem solving** and **working with others** will become integral components of most positions across all sectors.

In some cases, even more basic skill gaps were evident, again predominantly among young people at entry level jobs. These skills relate to basic employability skills such as turning up for work on time, completing a basic job application, personal appearance, initiative, and the ability/willingness to work for a full day.

7. WHAT LIES AHEAD

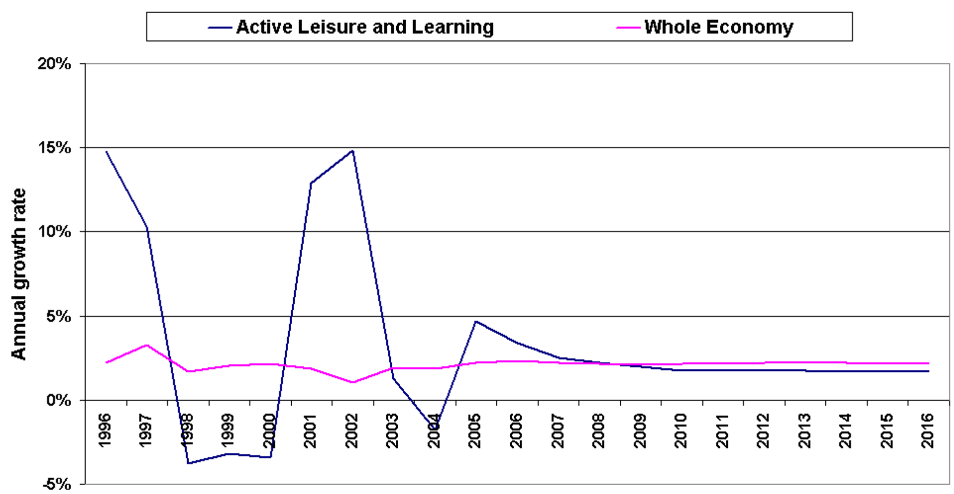
In order to forecast future skills needs it is important to examine the predicted growth, change in economic performance of the sector, and the resulting changes in employment and skills demand. The latest forecasts presented in this section are 2004 based estimates and were therefore before the recession took place and before successful bids for the 2012 Olympic and Paralympic Games and 2014 Commonwealth Games.

7.1. Output growth

Experian[61] figures show that annual output growth rates in the Scotland active leisure, learning and well-being sector had fluctuated over the last ten years. Falling output levels between 1997 and 1999, across the sectors, were followed by very strong output growth between 2000 and 2002. However, the average rate of growth over the last five years to 2004 equalled 3.2 per cent, outperforming the Scotland economy as a whole.

Output in the sector was forecast to rise strongly in 2004, and experience steady growth over the next ten years. Between 2009 and 2014, annual output growth was forecast to average 1.8 per cent per year, although slightly below the average rate of 2.2 per cent for the whole Scotland economy.

Figure 7.1 (a): Annual rate of growth in gross value added output in Scotland



Source: Experian, August 2005

According to Experian's calculations all active leisure, learning and well-being sub-sectors except the caravans sector grew over the five years up to 2004, with particularly strong performances by the playwork and health and fitness sectors. Playwork grew at an annual rate of 11 per cent between 1999 and 2004 (although care must be taken when considering this growth rate as output from the Scotland playwork sector is relatively small, and small numbers may cause anomalous results).

The caravans sector saw output fall over the five years up to 2004 by an average annual rate of 3.3 per cent. Although this declining trend was not expected to continue over the following ten years, output in the Scottish caravans sector was forecast to grow very slowly, below both the active leisure, learning and well-being and Scotland economy rates.

Output growth over the ten years to 2014 was expected to be driven mainly by the health and fitness and sport and recreation sectors, which were forecast to experience faster rates than the

[61] *The Future for Active Leisure and Learning – Scotland,* Experian Business Strategies, 2005

Scotland economy as a whole. However, playwork and the caravans sector were forecast to lag behind the sector trend.

Figure 7.1 (b): Output* growth in active leisure, learning and well-being in Scotland
(Average annual growth, %)

	1999 to 2004	2004 to 2009	2009 to 2014
Active leisure, learning and well-being	3.2%	2.1%	1.8%
Sport and recreation	2.6%	2.6%	2.2%
Health and fitness	3.9%	3.2%	2.5%
Playwork	11.1%	1.1%	0.9%
The outdoors	1.1%	1.9%	1.6%
Caravans	-3.3%	0.7%	0.3%
Whole Scotland Economy	1.8%	2.1%	2.2%
Whole UK Economy	2.7%	2.8%	2.6%

**Measured as Gross Value Added (the net value of output or the value of income earned by individuals and corporations).*

Source: Experian, August 2005; based on data sourced from National Statistics.

7.2. Employment growth in Scotland

In terms of employment, the Scotland active leisure, learning and well-being sector grew at an annual average growth rate of 3.3 per cent over the five years up to 2004 (figure 7.2 (a)). As in other service industries, this represented strong growth when compared with the whole Scotland and whole UK economies.

While the average annual rate of growth in total employment was forecast to slow over the next ten years, to 1.2 per cent between 2009 and 2014, employment growth in the Scotland active leisure, learning and well-being sector was expected to continue to significantly outperform the whole Scotland economy, which was forecast to only maintain constant employment levels.[62]

Sectorally, health and fitness and sport and recreation were expected to see comparatively strong employment growth over the next decade, following the trend of the previous five years.

In contrast, the slight fall in total employment numbers in the caravan industry between 1999 and 2004 was expected to continue over the next ten years, while playwork was forecast to experience a reversal of trends; employment growth was to slow considerably over the next ten years to 2014.

[62] *The Future for Active Leisure and Learning – Scotland,* Experian Business Strategies, 2005

Figure 7.2 (a): Employment growth in active leisure, learning and well-being in Scotland

	(Average annual growth, %)		
	1999 to 2004	**2004 to 2009**	**2009 to 2014**
Active leisure, learning and well-being	3.3%	2.1%	1.2%
Sport and recreation	2.3%	2.7%	1.7%
Health and fitness	2.5%	2.9%	1.9%
Playwork	9.1%	0.8%	0.0%
The outdoors	1.8%	1.3%	0.8%
Caravans	-0.9%	-1.7%	-2.4%
Whole Scotland Economy	0.8%	-0.1%	0.0%
Whole UK Economy	1.0%	0.6%	0.4%

Source: Experian, August 2005; based on data sourced from National Statistics.

7.3. Forecast shifts in patterns of employment

Experian[63] forecast the profile of the Scotland active leisure, learning and well-being workforce to remain quite stable over the next ten years to 2014, with only slight shifts in the proportion of the workforce by status and age.

- Between 2004 and 2014 the percentage of 25 to 44 year olds was forecast to fall and the percentage of those 45 and older to rise.
- Part-time work is significantly more important to the Scotland active leisure, learning and well-being sector than it is to the whole economy. Over the next ten years to 2014 those working on a part-time basis were to continue to exceed those employed full-time in active leisure, learning and well-being.
- The sector is expected to remain dominated by employees rather than self-employed. Indeed the proportion of self-employed was forecast to fall slightly.

The occupational profile of the Scotland active leisure, learning and well-being sector was not expected to change dramatically according to Experian, but relative growth was forecast in the number of management, associate professional and administrative roles over the ten years to 2014.

- The largest absolute growth was to be seen in the number of managers and senior officials, made up largely by managers and proprietors in hospitality and leisure services. The number of workers classified in associate professional and technical occupations and personal service occupations was also expected to grow.
- In relative terms, the number employed within secretarial and related occupations was forecast to grow at an average annual rate of change of 2.3 per cent between 2004 and 2014. Elementary personal services occupations were also to grow by an average of 2.5 per cent annually.
- The number of teaching professionals and childcare and related personal services was expected to fall, although this does not lead to a fall in total playwork employment.

[63] ibid

7.4. Trends in replacement demand

Experian[64] calculated that replacement demand in the active leisure, learning and well-being sector in Scotland was to average just 8,000 annually over the five years to 2009 (figure 7.4 (a)). The sport and recreation sector was to constitute the majority of this, creating 70 per cent of total replacement demand.

Workers switching occupation was to continue as the main cause of turnover, although other reasons such as leaving to study or look after family were also important.

Figure 7.4 (a): Replacement demand in active leisure, learning and well-being in Scotland

	(Average annual 2005 to 2009)	
	No.	% of total replacement demand**
Total replacement demand	7,960	100%
Sport and recreation	5,600	70%
Health and fitness	660	8%
Playwork	1,250	16%
The outdoors	390	5%
Caravans	400	5%
Reason for turnover		
Switching occupation	4,480	56%
Move into unemployed	1,030	13%
Retirement	580	7%
Other reason*	1,880	24%

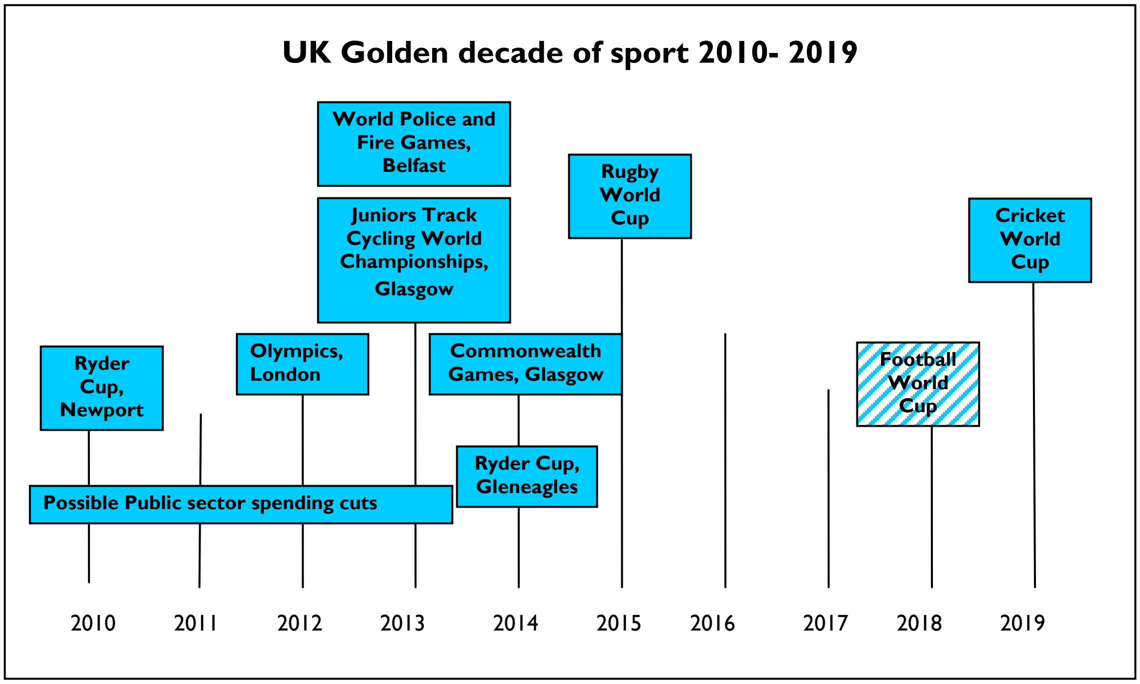
* Includes leaving to become a student; becoming a government trainee, leaving to look after family, and becoming otherwise inactive.
** Sub-sector percentages will not sum to 100 due to overlap of footprints.

Source: Experian, August 2005; based on data sourced from National Statistics

[64] ibid

7.5. 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.



The 2014 Commonwealth Games is receiving £454 million funding from a mixture of public and private money. Scotland already has 70 per cent of the venues in place and some of these will see upgrades to bring them up to standard. Key new venues will include: Glasgow's new **Sir Chris Hoy Velodrome** (first of its kind in Scotland) which is currently under construction in the city's East End; a new **National Indoor Sports Arena** in Dalmarnock (5,000 spectators); a **mountain bike centre**; an **international hockey complex** at Glasgow Green; the **Commonwealth Games Village** (cater for 6,500 athletes and officials) and the **Scottish National Arena** (entertainments arena).

The economic benefits of the Games will be to generate an estimated 1,200 jobs, with 1,000 of these in Glasgow. An increase in tourists will also generate many millions for the Scottish economy.

The Games legacy for sport set out earlier means a skilled workforce is essential and a coordinated approach by employers to develop the workforce is vital. Key objectives are to increase:

- The level of physical activity across all ages and groups;
- The capacity of multi sports and physical activity clubs / groups working together and linked to Community Sports Hubs across Scotland;
- The number of active young people and members including volunteers in these clubs/groups;
- The number of clubs accredited through recognised local authority or Governing Body Club Accreditation Award(s);
- The identification and development of local talent;
- The capacity and expertise of the workforce in a broad range of skills.

7.6. Changes to pattern of skills requirements and skills use arising from key drivers

Experian forecast that the number of workers in the Scotland active leisure, learning and well-being sector with qualifications at SVQ levels 4 and 5 were to rise by almost 3,000 over the next ten years to 2014, the percentage of the workforce in this category was forecast to fall as the numbers possessing lower level qualifications grow proportionally faster. However, this change is very small, leaving the percentage of workers qualified to each level almost constant between 2004 and 2014.

In 2005 the SkillsActive research into sport, fitness and the outdoors indicated an expectation of increasing skill level requirements for customer service, basic I.T. and communication skills and also child protection skills, which was the most frequently cited to increase along with customer service.[65]

[65] *Sport, Fitness and Outdoors Employment Survey*, SkillsActive, 2006, note overall base of 30, use with caution qualitatively.

7.7. Sector perspectives

One of the other key factors which differentiate the outlook for each sub-sector is the type of provision, be it public, private or voluntary.

There are some differences by sub-sector. Customer orientation is particularly important in sport and recreation but is much less so in playwork. The more commercial sub-sectors, like fitness and the caravan industry will have a greater commercial emphasis, and certain roles like sales and marketing will be more important to these sub-sectors than to sub-sectors like sport and recreation or playwork where profit is not the sole aim. This health and fitness sector comment is typical of the private health and fitness sector:

> *"the biggest lack of skills is in sales and marketing. 85 per cent of revenue comes from sales and we encourage everyone to develop these skills as everyone sells the club".*
> Fitness chain

The common SkillsActive sector skills needs are:

- Communication
- Teamwork
- Technical and
- Customer orientation.

But each sub-sector has its own particular needs.

The caravan industry requires vocational, task-related skills rather than academic qualifications, including core skills, tourism skills, food handling / preparation and cooking, general DIY, joinery, plumbing and electrical skills and I.T. skills. Employers undertake a lot of "on-the-job training".

Communication and team work are highly important in both playwork and health and fitness. Both these sub-sectors rated technical skills comparatively lowly. For playwork, perhaps technical skills are less of a priority than acting as one team to manage play provision. For health and fitness, this reflects the relative priority of customer orientation.

Technical skills have top billing in the outdoors, reflecting the value of sport governing body awards for employment in this sub-sector.

8. SECTOR PRIORITIES

Key strategic issues to be addressed in order to enhance sector competitiveness.

The inception of the **Scottish Parliament** has led to the development of a number of strategies impacting significantly on the active leisure, learning and well-being sector.

The implementation of **national strategies** for sport and physical activity and the legacy for the 2014 Commonwealth Games present opportunities for developing a well-trained workforce and increased demand for participation in physical activity and sport.

The integrated services approach to **children's services** promoted by the Scottish Government will have far-reaching effects on the training and skills expected of playworkers and others in this sub-sector. A cross-sector approach in conjunction with key partners in the delivery of children's services, and an emphasis on flexibility and the acquisition of new skills, leading to broader career opportunities, represents a variation on the workforce development process in the rest of the UK. The sector will seek to ensure that the core values of play and the valuable contribution of the playworker are recognised as vital components in this holistic approach.

The active leisure, learning and well-being sector has been growing at a rate faster than the **Scottish economy** as a whole. Before the current economic climate this was set to tail off in the years up to 2014 in respect of the sector in total, whilst the health and fitness sub-sector was expected to continue to out-perform the overall economy. There are positive signs the sub-sector has weathered the recession. The focus on preventative healthcare and increasing physical activity is likely to have implications particularly for health and fitness in terms of recruitment and skills.

Volunteers make a particularly strong contribution to the work of the sector, and outnumber paid employees. Recent national strategies, both generic to volunteering and specific to this sector, have placed emphasis on the need for volunteer development, to support volunteers and have people that manage volunteers skilled appropriately too. The task of providing volunteers with the increasingly sophisticated range of skills called for, whilst retaining the motivation of the volunteers themselves, will be major challenges for the sector in the coming years.

Reports of **difficulty in filling vacancies** are attributed by employers to the generally low-skilled, low pay entry-level positions characteristic of many parts of the sector and this is exacerbated in rural areas. Many employers consider that they are now at a disadvantage against other sectors in this regard. In addition, the lack of preparedness of new entrants trained in "higher-level" skills to undertake such work is problematic. Potentially exacerbated by the predicted fall in the proportion of people of working age in the Scottish labour market, this is an issue with possible long-term impact on the quality of service provided by the sector.

Skills gaps identified by employers in the sector are mainly in core, or soft skills such as customer handling, oral communication, problem solving and teamwork, which ranked as the most important skills. These are followed by planning and organising, written communication and basic computer literacy / using I.T. The frequent incidence of these skills being found to be lacking in new entrants to the profession was a repeated concern of employers in all sub-sectors. It is here that the mis-match between supply of recruits and demand is most marked, an issue clearly requiring to be addressed.

The **Register of Exercise Professionals** is regarded by the growing number of employers who have experience of it as an important driver in professionalising the health and fitness sector. Features of the register such as National Occupational Standards, endorsed training providers and records of staff qualifications, which can be checked by employers and public alike, generate a sense of confidence in fitness professionals that enhances their status. The possible inception of similar registers for professionals in other sub-sectors aroused employer interest and it appears likely that this will expand in the future including licences for coaches.

The sector's contribution to **tourism** is increasingly recognised, with the growth of activity tourism and the future attraction of major international events such as the 2012 Games, the 2014 Commonwealth Games and the Ryder Cup. Skill-sets ranging from teamwork and customer care to event management and outdoor leadership are likely to be in increasing demand in the next ten years. Cross-sector co-operation is seen as the most strategic and effective route to enable these opportunities to be optimised.

The predicted **changes in the age profile** of the Scottish population also impact on the nature of the market for the sector's products and services. In particular, the 50 plus age group is set to grow as a proportion of Scotland's population. This has implications for changing tastes in leisure consumer behaviour, with older groups with disposable income seeking recreational opportunities suited to their extended active lifestyles. On the other hand there seems likely to be a focus on the health-related needs of particular target populations. With the supply side, there will be an older age profile to the pool from which sector employers will need to recruit especially as they will be working longer. All of these aspects of demographic change have implications for the skills and training requirements of the sector.

9. SECTOR SOLUTIONS

SkillsActive has created a devolved sector committee structure and Scotland also has four employer committees to provide a framework for employer leadership across the UK. This reflects 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.

Each sub-sector committee articulates career pathways to map progression routes, which are published in an interactive careers map, and form the basis of **careers advice**.

The **Scottish Credit and Qualifications Framework** provides a way to understand and compare qualifications. It helps to describe the programmes of learning that lead to qualifications; supports the development of progression routes; and maximised the opportunities to transfer credit points between qualifications.

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.

The sector has developed five **skills priorities**, which will all help employers to improve the quality and range of their service offer:

1. To improve recruitment and retention.
2. To professionalise and upskill the existing workforce.
3. To match training supply to employer demand.
4. To source funding for training.
5. To increase sector investment in our people.

1. Improve recruitment and retention

Examples of progress	Further action required
• SkillsActive is promoting the use of National Occupational Standards for competency-based recruitment; • Delivered information and labour market information to careers advisors; • Work on employability of graduates through encouraging more and worthwhile work placements; • Provided work placements with outdoor activity providers for local school children in the Cairngorms to enhance their career choices because employers reported that local people were not aware of careers in this sector and they recruited from across the world; • ActivePassport™ developed as an on-line tool that gives practitioners and employers a real-time record of achievements including qualifications and work experience; • Development of a careers toolkit in partnership with SSSC launched in Dec 09; • SkillsActive is working with partners to develop a skills plan for the sport and active leisure workforce so that it is prepared to welcome new participants in the Active Nation and Community Sports Hubs.	• Work with Skills Development Scotland on raising awareness about the careers in our sector and the competition for jobs; • Provide a clear map of careers and promote career progression pathways using case studies; • Use research findings with local working groups to address participation and careers barriers; • Promote ActivePassport™ to Scottish employers.

2. Professionalise and up-skill the existing workforce

Examples of progress	Further action required
• Two Modern Apprenticeship (MA) Frameworks approved. One for active leisure, learning and well-being with 6 routes and the other a specialised one for apprentice football players which gives them assistance in making progress towards a second career. • Increased the core skill requirements in both MAs at the request of employers. • SkillsActive supported the development of 12 workforce development plans for sports coaches. • Through funding from SCQF had the Mountain Leader Training Scotland Winter Award credit rated and levelled on to the SCQF giving greater acknowledgement of the achievements of those who had passed the award and helping professionalise outdoor instructors. • To guarantee the quality of CPD training in fitness and separately in playwork, SkillsActive operates an endorsement scheme where programmes are approved. • SkillsActive worked closely with **sport**scotland and the SQA Awarding Body to ensure that the UKCC qualifications were jointly awarded by the governing bodies of sport and the Scottish Qualifications Authority. • SkillsActive and **sport**scotland worked with Volunteer Development Scotland to develop courses in the management of volunteers.	• SkillsActive will continue to engage with a wide range of employers in Scotland to gauge what needs to change to help them to improve the service delivery and productivity of its workforce. • Explore the possibility of extending the Modern Apprenticeship in Sporting Excellence for other sports participants. • Promote the endorsement schemes with Scottish training providers. • Promoting continuing professional development opportunities to fitness professionals. • Continue to raise sector management and leadership standards through linking in to the Scottish government plans for enhancing these SkillsActive. • Continue to promote take up of relevant qualifications including apprenticeships. • Explore funding opportunities for more mature apprentices as employers in many of our sectors have a need for more experienced staff. • We will support sectoral training providers to have their courses credit rated and levelled on to the Scottish Credit and Qualifications Framework (SCQF). • We will develop NOS on the promotion of health weight to help to address the obesity agenda in Scotland.

3. Match training supply to employer demand

Examples of progress	Further action required
• Developed a Sector Qualifications Strategy Scottish Action Plan with input from Scottish employers. • Development of new and review of existing National Occupational Standards with involvement of Scottish employers and experts. • Through funding from **sport**scotland, SkillsActive is delivering a programme of Lecturers into the Sports Industry to encourage lecturers to expand their understanding of the sports industry through professional development. This will be evaluated. • SkillsActive in Scotland is working with the Alliance on a Lecturer and Business Exchange Programme. • SkillsActive worked with SQA to make improvements to the content of the HNC in Fitness health and exercise so that successful candidates met the standards to join the Register of Exercise Professionals at level 2. • Development of a new SCQF level 9 qualification for playwork managers to allow them to register with the Scottish Social Services Council. • Development of an NPA in Playwork in a sporting environment in response to employer requests.	• SkillsActive will continue to work strategically with the Scottish government and its agencies to deliver a more demand led skills system that meets the needs of employers, and to engage with employers so that we know what they need and can speak with legitimacy on their behalf. • SkillsActive will develop NOS that will be used by awarding bodies to design qualifications and by training providers to design courses. • SkillsActive will encourage employers to become involved in the development of new qualifications and courses both vocational and academic as recommended in the Skills for Scotland Strategy. • Continue to implement the SQS Scottish Action Plan. • Develop new NOS and continue to promote the wide uses of NOS to employers in Scotland. • Explore the skills needs of the workforce that will be needed to deliver the Active Nation and Community Sports Hubs elements o the Legacy Plan. SkillsActive has applied to Skills Development Scotland for funding to investigate the needs of employers and to write a skills plan. • Work with HE to improve the skills and competence of graduates so that they are more job ready. • Encourage training providers to include work placements as part of courses so candidates are more aware of reality of working in the sector and the skills and experiences required. • Because a significant proportion of our workforce is voluntary we will work with 3rd sector organisations like VDS and SCVO to ensure that we are well linked to the skills needs of both volunteers and their managers.

4. Source funding for training

Examples of progress	Further action required
• Our focus has been on coordinating training courses so that there is optimum value for money as there is very little funding available for training. Employers through the SPORTA of HR and training professionals have been encouraged to offer places on training courses to neighbouring employers. • SkillsActive has provided support for the creation of the Lochaber Outdoor Learning Network. • We are having discussions regarding the embedding of industry courses within publicly funded courses.	• Employers are anxious about the over-supply of graduates in some sub-sectors both from the point of view of the career progression for the individuals but also the public investment that has been made therefore SkillsActive is continuing to raise awareness and exploring ways that restrictions might be placed on the number of courses and or the number of graduates so that public investment might be better directed to courses that are needed and valued. • SkillsActive will encourage more partnership working and collaboration among employers. • Ideally we would like to see flexible funding available for employers to offer bite sized chunks of learning and we will try to pursue this.

5. Increase sector investment in our people

Examples of progress	Further action required
• Employers in our sector have a good record of investing in the training of their staff; however SkillsActive has been encouraging employers to continue this good practice through the recession. • Funds are short so through collaboration and more effective networking courses and training are being better shared. • Development of the ActiveAnalyser tool and pilots in England and Wales.	• Continue to emphasise the need for employers to invest in their staff. • Find ways to invest in smarter ways so there is no increase in cost. • Explore funds that will allow us to develop ActiveAnalyser so that it can be shaped to meet the needs of Scottish employers.

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ANNEXES

1. Technical annex

Defining the sector using SIC and SOC codes

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, making it difficult to use SIC codes to identify the size of the sectors.

Establishing the SIC 2003 footprint

Our predecessor organisation, SPRITO (the National Training Organisation) commissioned IDBR to undertake an analysis of the SkillsActive sector in 1997, prior to the introduction of tighter regulations under the Data Protection Act 1998. This examination allowed the exploration of five and six digit SIC codes and helped to identify the proportions of four digit SIC codes which have been used historically to define the five sub-sectors.

As part of the SSA process, SkillsActive worked with Experian in 2005 to further develop this footprint and fine tune SkillsActive and its constituent sectors to proportions at the four digit SIC level. These are detailed in Table1 and were derived by identifying the proportion of employers that fall under SkillsActive's remit by SIC code from Experian's National Business Database. A further search for key occupations (Standard Occupational Classifications abbreviated as SOC codes) in the sector was performed using a SIC/SOC matrix. This identified additional industries in which SkillsActive occupations (like Coaching) take place.

Table 1): Definition of the SkillsActive sector – SIC 2003

Sub-sector	SIC 2003 Code	SIC Description	Share of SIC code (%)
The outdoors	9272	Other recreational activities	13
	5521	Youth hostels and mountain refuges	75
	9262	Other sporting activities	4
	9261	Operation of sports arenas and stadia	1
	5523	Other provision of lodgings n.e.c.	6
	8042	Adult and other education n.e.c.	1
	7122	Renting of water transport equipment	20
	2932	Manufacture of other agricultural and forestry machinery	3
Caravans	3420	Manufacture of bodies of motor vehicles	21
	5010	Sale of motor vehicles	2
	5521	Youth hostels and mountain refuges	25
	5522	Camping sites including caravans sites	100
	5523	Other provision of lodgings n.e.c.	9
Sport and recreation	9261	Operation of sports arenas and stadia	100
	9262	Other sporting activities	89
	9133	Activities of other membership organisations	17
	9272	Other recreational activities n.e.c.	26
	9304	Physical well-being activities	1
	0142	Animal husbandry service activities (exc. veterinary activities)	9
	8021	General Secondary Education	4

Playwork	8010	Primary Education	10
	8532	Social work without accommodation	5
	9133	Activities of other membership organisations	5
Health and fitness	9304	Physical well-being activities	55
	9261	Operation of sports arenas and stadia	13
	9262	Other sporting activities	10
	9272	Other recreational activities n.e.c.	2
	8042	Adult and other education n.e.c.	1

Table 2): Occupations used in SIC / SOC Matrix

SOC Code	SOC Description
1225	Leisure and sports managers
3441	Sports players
3442	Sports coaches, instructors & officials
3443	Fitness instructors
3449	Sports and fitness occupations nec.
6123	Playgroup leaders & assistants
6211	Sports and leisure assistants

Limitations of using government sources

The Annual Business Inquiry surveys 78,000 workplaces in the UK which have at least one employee to measure employee jobs and financial information on organisations based on Standard Industrial Classifications (SIC codes). The ABI does not provide information on the self-employed or on volunteers.

The Labour Force Survey is a household survey covering 120,000 people which measures employment, workforce jobs, vacancies, earnings and hours worked. In addition to classifying organisations by SIC code, it uses Standard Occupational Classifications (SOC codes) to identify the nature of jobs. It is well-known that the Labour Force Survey tends to miss people who live in communal establishments, like students or members of the Armed Forces. This is also likely to affect the outdoors, and Caravan sub-sectors where the workforce is likely to have accommodation provided on-site, and the LFS may therefore underestimate employment in these sub-sectors.

Scottish Employer Skills Survey 2008

The Scottish Employer Skills Survey (SESS) is a biennial survey telephone survey of organisations with at least one employee, and the sampling is designed to obtain robust results for Sector Skills Council based on whole (100 per cent) SIC codes only. This particular survey does not capture any self-employment or voluntary work, both of which are important to SkillsActive.

This report will refer to the SESS survey 2008 as a proxy for skills needs for the whole sector. It must be borne in mind that the SkillsActive sector sampling and analysis is largely based on organisations in sport and recreation (SIC 92.6 and 92.72) with smaller responses from the caravans sector (SIC 55.22) and from health and fitness (SIC 93.04).

Improvements afforded by SIC 2007

This will be improved under SIC 2007 by the introduction of new 4-digit SIC codes for:

- sport and recreation education - which may be suitable for the outdoors
- sports clubs
- fitness facilities
- renting and leasing of recreational and sports goods

SkillsActive will also gain the ability to access sector data using 3-digit SIC codes:

Table 3): SIC 2007 Codes for SkillsActive

The SIC 2007 SKILLSACTIVE		
GROUP	**CLASS**	**SUBCLASS**
32.3 Manufacture of sports goods		
	32.30 Manufacture of sports goods	
		29.20/3 Manufacture of caravans
55.3 Camping grounds, recreational vehicle parks and trailer parks		
	55.30 Camping grounds, recreational vehicle parks and trailer parks	
		55.20/1 Holiday centres and villages
	77.21 Renting and leasing of recreational and sports goods	
	85.51 Sports and recreation education	
93.1 Sports activities		
	93.11 Operation of sports facilities	
	93.12 Activities of sports clubs	
	93.13 Fitness facilities	
	93.19 Other sports activities	
		93.19/1 Activities of racehorse owners
		93.19/9 Other sports activities (not including activities of racehorse owners) n.e.c
	93.29 Other amusement and recreation activities	

Playwork will still not be defined, or sampled using SIC 2007.

2. External initiatives

Partner organisations

Key stakeholder organisations include the following:

- Scottish Enterprise,
- Highlands and Islands Enterprise
- Scottish Qualifications Authority,
- Futureskills Scotland (absorbed into Scottish Government April 2008)
- Scottish Funding Council,
- Scottish TUC,
- Jobcentre Plus
- Scottish Executive
- Skills Development Scotland (Careers Scotland, learndirect Scotland, Scottish University for Industry, skills elements from Scottish Enterprise and Highlands and Islands Enterprise).

In addition to engaging individual employers SkillsActive in Scotland has links with a number of sector-specific partner organisations including:

- **sport**scotland
- NHS Health Scotland
- VOCAL (The Voice of Chief Officers of Cultural, Community and Leisure Services in Scotland)
- Institute for Sports, Parks and Leisure (Scotland)
- Institute of Sport and Recreation Management (Scotland)
- Volunteer Development Scotland
- The Scottish Sports Association
- The Scottish Association of Local Sports Councils
- Play Scotland
- Youth Sports Trust
- Scottish University Sport

3. National Performance Framework

NATIONAL PERFORMANCE FRAMEWORK

THE GOVERNMENT'S PURPOSE

TO FOCUS GOVERNMENT AND PUBLIC SERVICES ON CREATING A MORE SUCCESSFUL COUNTRY, WITH OPPORTUNITIES FOR ALL OF SCOTLAND TO FLOURISH, THROUGH INCREASING SUSTAINABLE ECONOMIC GROWTH

HIGH LEVEL TARGETS RELATING TO THE PURPOSE

GROWTH | PRODUCTIVITY | PARTICIPATION | POPULATION | SOLIDARITY | COHESION | SUSTAINABILITY

STRATEGIC OBJECTIVES

WEALTHIER & FAIRER	SMARTER	HEALTHIER	SAFER & STRONGER	GREENER

NATIONAL OUTCOMES

- We live in a Scotland that is the most attractive place for doing business in Europe
- We realise our full economic potential with more and better employment opportunities for our people
- We are better educated, more skilled and more successful, renowned for our research and innovation
- Our young people are successful learners, confident individuals, effective contributors and responsible citizens
- Our children have the best start in life and are ready to succeed
- We live longer, healthier lives
- We have tackled the significant inequalities in Scottish society
- We have improved the life chances for children, young people and families at risk
- We live our lives safe from crime, disorder and danger
- We live in well-designed, sustainable places where we are able to access the amenities and services we need
- We have strong, resilient and supportive communities where people take responsibility for their own actions and how they affect others
- We value and enjoy our built and natural environment and protect it and enhance it for future generations
- We take pride in a strong, fair and inclusive national identity
- We reduce the local and global environmental impact of our consumption and production
- Our public services are high quality, continually improving, efficient and responsive to local people's needs

4. Register of Exercise Professionals qualifications framework

There are presently four levels of registration on REPs.

Level 1 Student

Student members are not yet qualified and must be supervised by a qualified member of staff

Level 2

Covers the following:

Water Based Exercise

Exercise to Music

Gym

Level 3

Covers the following:

Advanced Fitness Instruction

Advanced Group Exercise to Music

Exercise Movement & Dance Partnership Teacher (EMDP)

Personal Training

Pilates Teacher

Yoga Teacher

Exercise Referrals

Level 4 - Specialist Exercise Instructor

Level 4 is awarded to individuals who can demonstrate that they have met the level 4 National Occupational Standards in one or more medical areas, completing and passing one of the following approved level 4 qualifications:

BACR Phase IV Exercise Instructor Training

WRIGHT Foundation Cardiac Rehab Phase IV

Later Life Training Postural Stability Instructor (PSI)

Active IQ Certificate in Exercise for the Management of Lower Back Pain

Exercise after Stroke: Specialist Instructor Training Course

Remedial Instructor (Military Only)

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