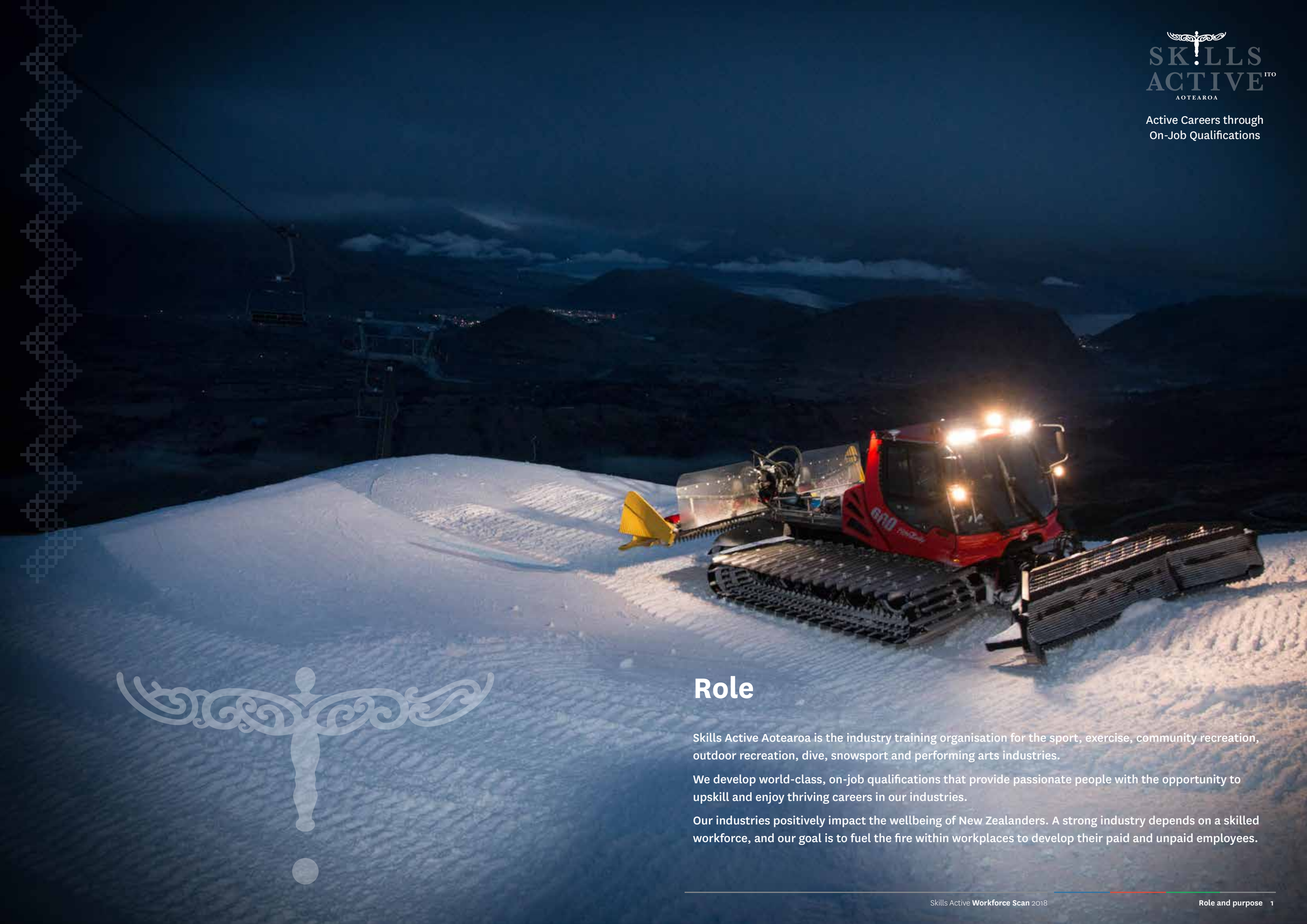
Sport, Recreation and Performing Arts Industries'

SKILLS ACTIVE ITO AOTEAROA

Active Careers through On-Job Qualifications

Workforce Scan 2018



SKILLS ACTIVE ITO
AOTEAROA

Active Careers through
On-Job Qualifications

Role

Skills Active Aotearoa is the industry training organisation for the sport, exercise, community recreation, outdoor recreation, dive, snowsport and performing arts industries.

We develop world-class, on-job qualifications that provide passionate people with the opportunity to upskill and enjoy thriving careers in our industries.

Our industries positively impact the wellbeing of New Zealanders. A strong industry depends on a skilled workforce, and our goal is to fuel the fire within workplaces to develop their paid and unpaid employees.

Vision

Our industries' first choice as a partner for workforce development.

Purpose

To build a highly qualified workforce in the sport, exercise, community recreation, outdoor recreation, dive, snowsport and performing arts industries, leading to productive and sustainable organisations that provide quality services to New Zealanders.

Approach

We will be leaders and role models of:

- **BICULTURALISM**
- **SERVICE EXCELLENCE**
- **CONTINUOUS IMPROVEMENT**

Values

Our actions will be driven by our core values:

TIKA	PONO	AROHA
we do what is right	we are true to ourselves	we demonstrate respect and care

Strategic outcomes

SKILLS ACTIVE

- Is recognised as the one-stop-shop for planning, developing and supporting careers in our industries.
- Continues to grow as a strong organisation; relevant and valued by our industries and supported by all our stakeholders.
- Leads and innovates workforce development in our industries.
- Develops workforce solutions that are led and endorsed by industry.

Strategic themes

Our strategic outcomes will be achieved through our actions targeting the following themes:

Contents

Message from the Chair

E ngā mana, e ngā reo, e ngā tini kārarangamaha, tēna koutou, tēna koutou, tēna koutou katoa.

Me tuku atu reo hakamoemiti ki Te Runga Rawa.

Tuarua, e mihi kau ake ana ki wā tātou mate. Haere, haere, haere atu rā. Rātou te hunga mate ki a rātou, ka huri, ka puta atu nei i te mate ki a tātou nga kanohi ora o rātou mā.

I meatia nei i roto i ngā karaipiture, mei kore te tirohanga whakaanga ka matemate noa atu te iwi.

Nō reira, ko te kaupapa e tuhituhingia ana nei, he tirohanga ma tātou kia kite ai te huarahi anga mua kia whai ake nei i ngā hua tika. Pānuitia, kia mārama mai ki ēnei hua i kōrerohia ake nei.

The 2018 *Workforce Scan* represents a huge effort from our staff, stakeholders and partners. This document gives a big picture view of our industries, and is intended to help those industries develop a vision for their future based on a clear understanding of the landscape in which they operate.

Here at Skills Active, the *Workforce Scan* gives us another tool to sharpen our focus on the industries we serve, and continue to improve the services we provide to employers, professionals, students and volunteers, through on-job training and qualifications.

We are keen to continue working with our industries to maintain and grow this pool of knowledge, as part of our joint pursuit to build a highly-skilled and developed sport, recreation and performing arts workforce.

Nō reira, ka nui āku nei kōrero mā tēnei wā tonu nei.

Mauri ora ki a tātou katoa

Sam Napia
Skills Active Board Chairman

Introduction from the Chief Executive

We are thrilled to be able to bring you the 2018 edition of the *Skills Active Workforce Scan* – our annual research document on human capital in the sport, community recreation, exercise, outdoor recreation, dive, snowsport and performing arts industries. This report paints a picture of a thriving and vital group of industries, delivering real and meaningful gains in wellbeing to New Zealand and New Zealanders.

According to the latest data, our industries employ over 101,000 people across some 30,000 organisations. In 2016, this workforce – supported by more than one million volunteers – contributed $6.69 billion to the New Zealand economy.

Approximately 3,000 people were also employed in the snowsport industry, whose data we report separately.

Labour productivity in sport, recreation and performing arts, as measured by GDP per full-time equivalent, grew by 1.9% per annum over the last five years. In the same period, average earnings in our industries have increased by 2.5% over the last five years, to $50,600.

Sport and recreation is a key component of many New Zealanders' lifestyles. The professionals and volunteers in these industries play an intimate role in empowering us to lead healthy, active and meaningful lives. Numbers cannot truly convey the value added by the swim teacher taking a class for parents and babies, the outdoor educator working with teenagers, the wheelchair basketball coach mentoring competitive athletes, or the group fitness instructor giving lessons at a rest home.

We depend on the people working in the sport, recreation and performing arts industries to take good care of us. We expect them to listen and respond to our needs, to impart sound knowledge, to help us master new skills, and to keep us safe as we take part in physical activity. We need them to be educated, critical thinkers, agile and adaptable to a fast-changing world.

As individuals, and at a population level, we derive broad, long-lasting benefits from these industries, in terms of physical and emotional health, time spent in nature, resilience and social cohesion.

So, it's vital that we think strategically about the skills and training needed to maximise the output of this workforce. We need to understand the people we have, and the landscape in which they operate. Armed with that knowledge, we can plan for the requirements of the future.

Some of the issues we've looked at in this document include: the high proportion of part-time, contract and seasonal employees in our industries; concerns regarding the access to and availability of affordable training; pay rates lower than the national average; lower representation among Māori, Pasifika and Asian populations; and a younger workforce with fewer qualifications and a higher rate of attrition.

We've used a broad range of research methods to tackle some of the big questions about our industries: What do they bring to the table? What do they look like now, and how will that change in the future? What are their needs? What are the workforce problems that keep them up at night? And how can we contribute to the solutions?

The work we do to produce this report is motivated by our core goal at Skills Active: To fuel the fire within workplaces to develop skilled employees, and therefore positively impact the wellbeing of New Zealanders.

We hope you find value in this piece of work, and we would love to hear your feedback. Our strength is in the partnerships we have with our stakeholders in sport, community recreation, outdoor recreation, dive, exercise, snowsport and the performing arts, and our shared commitment to keep growing and improving the service we provide as a group of industries.

Grant Davidson
Chief Executive

Executive summary

Skills Active works with the sport, community recreation, exercise, outdoor recreation, dive, snowsport and performing arts industries. Employing over 101,000 people, and contributing approximately $6.69 billion to the economy annually, our industries provide significant value to New Zealand.

In this report, Skills Active has completed detailed 'scans' of the industries we work with in order to understand both the opportunities and the challenges. The intention of this document is to gather all the latest and most relevant knowledge of the people and organisations that make up this sector of the workforce.

The *Workforce Scan* also explores the training and development strategies that will empower our industries to steer a successful course in terms of finding, retaining and developing their people, now and into the future.

Structure of the Workforce Scan

Methodology and data

This report updates the 2017 *Workforce Scan*, drawing on surveys, economic and demographic data, qualitative research and more. Statistical data in this report was provided by Infometrics, unless otherwise specified, and was current as at August 30, 2017. All other sources are footnoted throughout the document. When reading this information, please note:

Snowsport:
Due to the seasonal nature of the snowsport industry, the Infometrics data is not suitable for use, as it relies on census data captured in March, when no ski fields are operating. Snowsport data has been collected directly from industry.

'Total sport, recreation and performing arts' figures:
These figures comprise exercise, sport and community recreation, performing arts, dive and outdoor recreation industry data. The data also includes some sport and recreation occupations that did not fall neatly into those three industries (This is referred to as pan-industry data in this report). Therefore, the total sport and recreation data is higher, in some places, than the sum of the individual industry data.

The 'total sport, recreation and performing arts' figures do not include snowsport. Data on this industry is provided separately in its respective industry scan section.

Although every care has been taken in the preparation of this document, Skills Active cannot accept legal liability for any errors, omissions or damages resulting from reliance on the information in this document.

Part one: Industry Scans

Part one of this document profiles the sport, recreation and performing arts industry as a whole, and then delves into individual profiles of the six industries with which Skills Active works:

- Exercise
- Sport and Community Recreation
- Outdoor Recreation
- Dive
- Snowsport
- Performing Arts

The profiles are broken down into:

Introduction
Industry Profile
Workforce Profile
Impact
Participation | Economic Tourism | Health | Social
Trends / Issues / Risks
Political | Economic | Social | Technological
Training Environment

Part two: Workforce Action Plan

This report and its predecessors have identified workforce trends, issues, and risks affecting our industries. Part two of this document, the Workforce Action Plan, outlines Skills Active's response to these challenges and opportunities.

Initiatives include designing fit-for-purpose qualifications, delivering these to the workforce in innovative ways, and giving workplaces tools to identify and respond to skill deficits in their staff, so they can grow their businesses.

Stakeholders

Skills Active works with a diverse group of stakeholders, from government, regulators and funders to employees, volunteers and participants. Our stakeholders are the backbone of sport, recreation and performing arts in New Zealand. The following diagram illustrates key stakeholders working across our industries.

Industries

Exercise | Sport and Community Recreation | Outdoor Recreation | Dive | Snowsport | Performing Arts

Government, Regulations & Funding

- Local Government
- New Zealand Qualifications Authority
- Tertiary Education Commission
- Ministry of Business, Innovation and Employment
- Department of Conservation
- Ministry of Education
- Sport NZ
- Tourism NZ
- Ministry for Culture and Heritage

Skills Active Aotearoa

Examples of National Organisations

- Exercise NZ
- NZ Register of Exercise Professionals
- Personal Trainers Council of NZ
- NZ Recreation Association
- Sport NZ
- Physical Education NZ
- Sportnet
- Regional Sports Trusts
- Water Safety NZ
- National Sports Organisations
- Young Mens Christian Association
- NZ Recreation Association
- NZ Mountain Safety Council
- NZ Outdoor Instructors Association
- NZ Rivers Association
- Tourism Industry Aotearoa NZ
- NZ Dive Council
- LandSAR
- Education Outdoors NZ
- NZ Mountain Guides Association
- Christian Camping
- Uniform Groups
- NZ Snowsports Council
- Ski Area Association of NZ
- NZ Snow Industries Federation
- NZ Snowsports Instructor Alliance
- Creative NZ
- Entertainment Technology NZ
- Entertainment Venues Association NZ
- Dance Aotearoa NZ
- Performing Arts Groups

Examples of Operators & Employers

- Regional Sports Trusts
- Regional Sports Organisations
- Schools
- Sports Clubs
- Swimming Pools
- Recreation Centres
- Local Government
- Gyms
- Private Event Companies
- Out of School Care Providers
- Community Organisations
- Personal Trainers
- Local Iwi Groups
- Māori Sports
- Commercial/ Tourism Operators
- Leisure Clubs
- Uniform Groups
- Outdoor Educators (Non–Profit)
- Schools
- Safety Auditors
- Snowsport Areas
- Tourism Operators
- Guides
- Technicians
- Entertainment Venues
- Performers
- Instructors
- Technicians
- Local Government

Employees, Volunteers, Education Providers & Participants

- Employees and Volunteers
- Education Providers
- Participants

Part one:

Summary of Industry Scans

Total Sport and Recreation Scan

All of our industries promote an active lifestyle, with some 2.5 million New Zealand adults taking part in some form of physical activity each week. On top of contributing to physical health, our industries provide social benefits by bringing people together, building skills, and fostering a sense of community and belonging.

These industries are complex and diverse, with nearly 31,000 operators – most of which are small-to-medium-sized businesses. On average, each operator employed 3.3 people in 2016, compared to the average business unit in the wider economy, which employed 4.3 people in the same year. A smaller number of businesses in the industry are large employers, such as councils and ski area operators, which employ considerably more people in each business.

With an increasingly diversifying and ageing population, the onus is on our industries to continue expanding and refining the range of recreation options available, in order to meet the needs of all cultures, preferences, health conditions and life stages.

Exercise Scan

6,539 people were employed in the industry in 2016

The exercise industry is a highly competitive market. There are between 400 and 600 health and fitness centres in New Zealand. Operators are quick to react to changing user demands, with strong growth in emerging areas such as 24-hour facilities, niche exercise classes and technology-assisted exercise.

Some 6,539 people were employed in the industry in 2016, or 0.3% of the national labour force. Exercise industry employment is forecast to climb to 7,000 by 2021. However, the growth rate is reducing, and the forecast is 1,000 people fewer than what was predicted in 2016.

Sport and Community Recreation Scan

In excess of 1,000,000 adults volunteer

This industry touches the lives of virtually all New Zealanders. It brings communities together – in teams, on the sidelines as spectators, in recreation facilities as users, and at recreation events as participants. The social and economic impact of sport and recreation is profound.

Sport and community recreation can be divided into facilities (indoor and outdoor); programmes and events; and coaching and officiating of athletes. Spanning public, not-for-profit and private organisations, the industry employed 34,394 people in 2016.

There is a large part-time and volunteer base (in excess of 1,000,000) that supports this industry. Challenges facing this part of the workforce include the high turnover of personnel, and the decrease in the number of hours people are typically volunteering.

Outdoor Recreation Scan

Outdoor educators and leisure groups both rely heavily on their volunteer base

Central to the fabric of Kiwi life, outdoor recreation is made up of the leisure, recreational and sporting activities that offer locals and tourists alike so much enjoyment, including tramping, camping, biking, boating and adventure tourism activities.

The outdoor recreation industry comprises outdoor educators, commercial outdoor operators and leisure groups. In 2016, those three groups represented 2,585 businesses, employing 10,822 people. Outdoor educators and leisure groups both rely heavily on their volunteer base, and on government and philanthropic funding.

379 people were employed as divers or dive instructors in 2016

Dive Scan

New Zealand's extensive coastal regions provide a prime opportunity to interact with the marine environment, and draw visitors from all around the world. Professionals with a dive skill-set have the expertise that enables them to productively and safely engage with the underwater world. Divers may work underwater for a variety of reasons, including: construction work; gathering seafood; retrieving property from shipwrecks; search and rescue; working on oil rigs; photography; police work; tourism or dive instructing. There were 79 dive-specific business units in the dive industry in 2016, employing 379 people as divers or dive instructors.

The season now lasts up to 16 weeks

Snowsport Scan

The snowsport industry offers skiing, snowboarding, cross-country skiing, alpine walking and trekking, and other on-piste activities. With advances in alpine equipment and snowmaking technology, winter seasons are extending, and more people are gaining access to snow-based recreation. New Zealand has consistently recorded more than one million skier visits per year since the early 2000s.

The snowsport industry is commercially focused, employing approximately 3,000 full-time (seasonal) workers. A season's success is dictated by the presence of snow, but with improved snowmaking technology and support the season now lasts up to 16 weeks. The industry is increasingly moving to whole-year operations, and therefore is crossing over into other fields, such as mountain biking, luging, tramping, star gazing and cultural tours.

The performing arts industry contributed $2.058 billion to GDP in 2016

Performing Arts Scan

The performing arts industry enriches and energises the cultural and social life of New Zealanders. The workforce includes a high proportion of freelancers, contractors and volunteers. In 2016, there were 9,227 business units operating in the performing arts industry. This was up from 8,111 five years earlier – a growth rate higher than that of the overall economy.

The industry contributed $2.058 billion to gross domestic product (GDP), or 0.9% of the total GDP, in 2016. An increasingly high number of New Zealanders participate in performing arts, with a 2014 Creative New Zealand survey finding that 85% of New Zealanders had attended a performing arts event or location in the past 12 months. In addition, 58% had been actively involved in the creation or production of such an event in the same period.

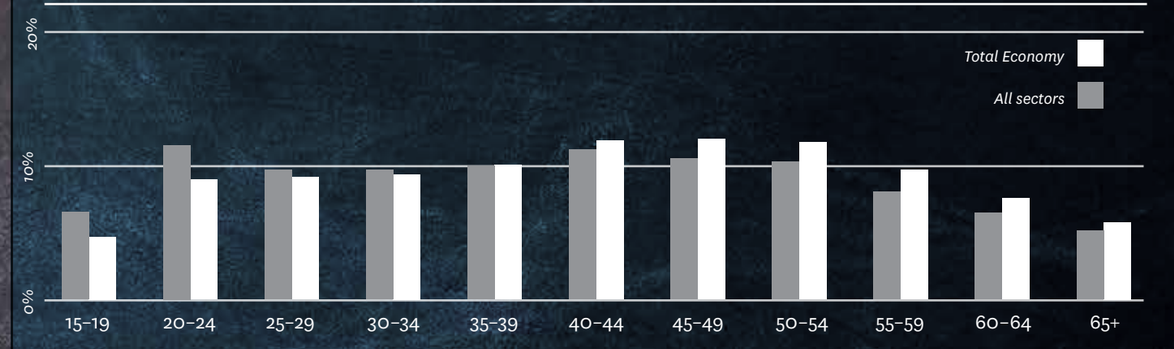
Total Sport, Recreation and Performing Arts Industry Scan

All the industries Skills Active works with, with the exception of exercise, make substantial contributions to either international or domestic tourism. A significant number of international tourists flock to New Zealand every year to enjoy the wide range of sport, recreation and performing arts activities.

Industry snapshot

Over 27,000 more people were employed in our industries in 2016 than in 2000

EMPLOYMENT BY AGE



FILLED JOBS IN INDUSTRY

2006
90,295

2016
101,134
4.3% of jobs

ECONOMIC CONTRIBUTION

$6.69B GDP

3% of New Zealand's GDP in 2016

EMPLOYMENT BY GENDER

ALL SKILLS ACTIVE INDUSTRIES

MALE **51%**

FEMALE **49%**

TOTAL ECONOMY

MALE **53%**

FEMALE **47%**

Total Sport, Recreation and Performing Arts Industry Scan[1]

Introduction

The sport, community recreation, exercise, outdoor recreation, dive, snowsport and performing arts industries are complex for their size. Work arrangements that include full-time, part-time, volunteer and seasonal work are further complicated by low pay rates, high staff turnover and a younger worker profile, providing a unique set of challenges for these indistries.

Despite these challenges, our industries have seen consistent growth in the past decade. Over 27,000 more people were employed in our industries in 2016 than in 2000. This strong growth is expected to continue in the future, with over 114,000 people forecast to work in our industries by 2021.

Industry profile

Our industries are multifaceted, with nearly 31,000 business units, of which most are small-to-medium-sized businesses. On average, they employed 3.3 people per business in 2016, compared with the average business unit in the wider economy, which employed 4.3 people in the same year. There are only a small group of businesses in the industry that are large employers, and have workforces in the hundreds, such as councils.

The organisations range from profit-focused businesses through to not-for-profit incorporated societies and charitable trusts. Other than the snowsport industry, which is primarily made up of commercial enterprises, our other industries tend to have a blended objective of profit and social outcomes.

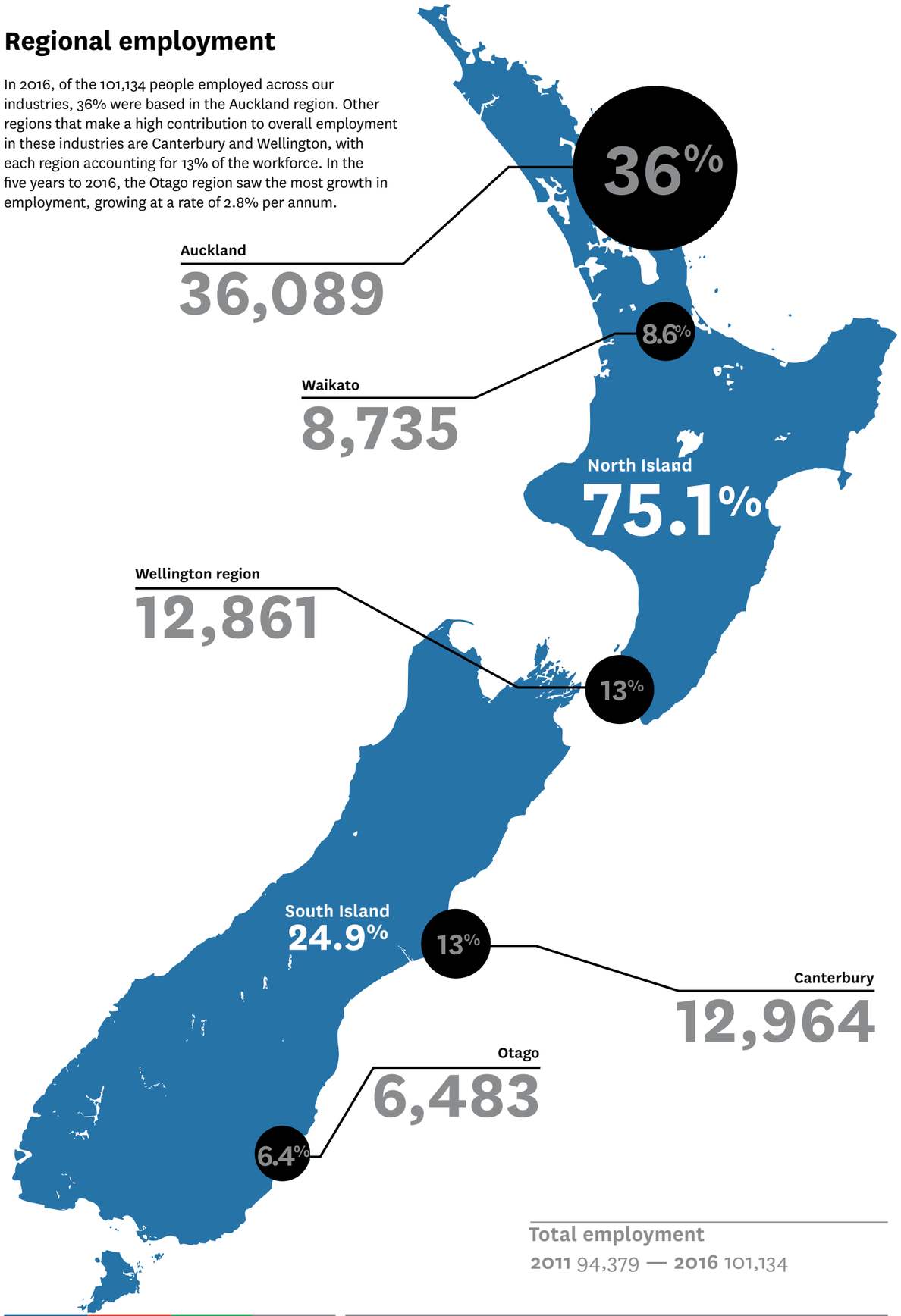
In addition to the mixed-delivery model blending profit and purpose, operators often cross boundaries in terms of the services they deliver. For instance, it is common for councils to offer exercise, community recreation and sporting opportunities from the various facilities that they either manage or own. Other examples include fitness centres that provide access to a gym and trainers, but also offer members opportunities to participate in corporate sport leagues.

A significant number of the incorporated societies and charitable trusts within our industries deliver personal development opportunities to young people. Examples include over 15,000 sports clubs, 14 regional sport trusts and 70 Christian camps. Most of these organisations are reliant on government, gaming and philanthropic funding. As a result, they tend to employ fewer paid staff and are often heavily reliant on volunteers.

[1] *Note: Last year, the figures in this section did not include the performing arts industry, whereas this year they do. Therefore the figures may differ significantly when compared with what was reported in the 2017 scan.*

Regional employment

In 2016, of the 101,134 people employed across our industries, 36% were based in the Auckland region. Other regions that make a high contribution to overall employment in these industries are Canterbury and Wellington, with each region accounting for 13% of the workforce. In the five years to 2016, the Otago region saw the most growth in employment, growing at a rate of 2.8% per annum.



Total employment
2011 94,379 — **2016** 101,134

Workforce profile

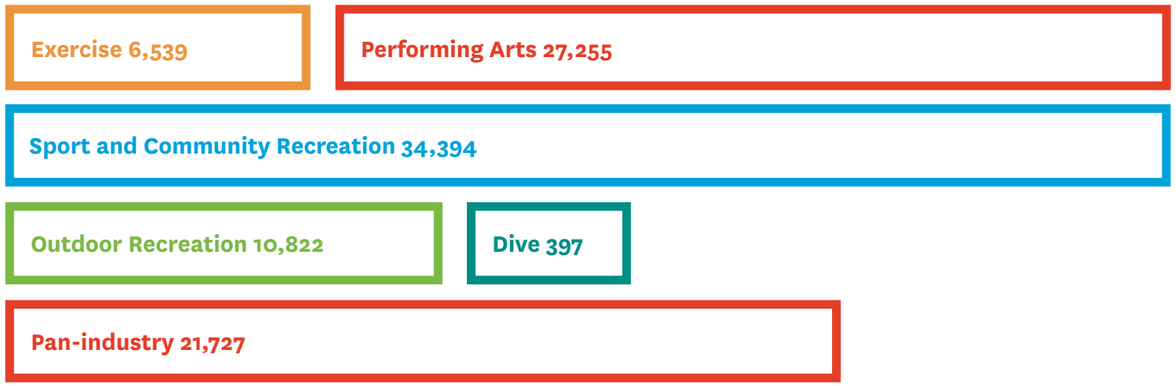
In 2016, 101,134 people were employed across our industries, or 4.3% of the total national workforce.

Employment growth in the five years to 2016 of 1.4% per annum was weaker than employment growth in the total economy (1.9% per annum) over the same period.

In the five years to 2021, employment in our industries is expected to grow by an average of 2.5% per annum, reaching a high of 114,693 in 2021. The industry expecting the most growth over this period is the dive industry, at 4.5% per annum, followed by outdoor recreation (3.7%) and sport and community recreation (3.6%). The industry predicted to experience the least employment growth over this period is the exercise industry, with a predicted growth rate of 1.1% per annum.

Total employment by industry

(Paid employees)



Workforce characteristics

	Exercise	Sport and Community Recreation	Outdoor Recreation and Dive	Performing Arts
Full-time employees	●	●	●	●
Part-time employees	●	●	●	●
Self-employed contractors	●	●	●	●
Professional athletes	●	●	●	✖
Volunteers	✖	●	●	●
Seasonal labour	✖	●	●	✖
High turnover	●	●	●	●
Casual labour *(Holiday programmes)*	✖	●	●	✖

Workforce makeup

The employment numbers of full-time equivalent (FTEs)[2] in our industries grew by 1.9% per annum over the five years to 2016, and reached a new high of 87,337 in 2016. This compares to growth of 2.5% per annum in the total economy.

A large proportion of workers in our industries are contractors, part-time employees or volunteers.

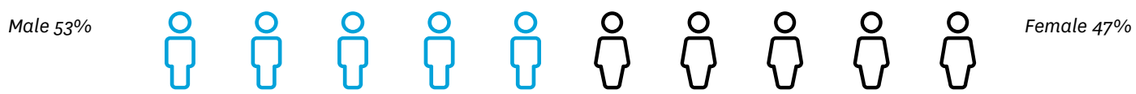
In 2016, 23.6% of people in our industries were self-employed. This is higher than the total economy's self-employment rate of 18.0%.

Gender

There were slightly fewer women than men working in our industries in 2016; females accounted for 49.3% of the workforce. This has increased from 46.9 % in 2001.

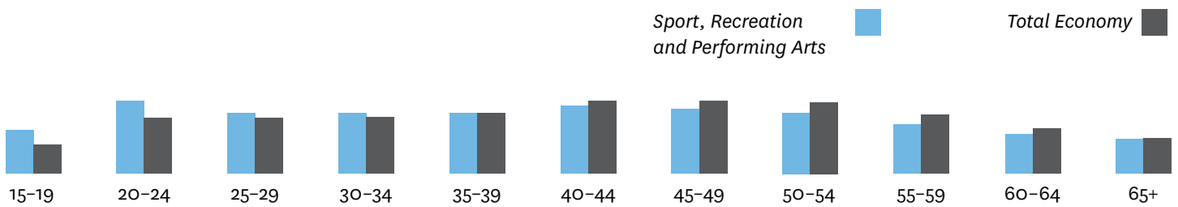
Sport, Recreation and Performing Arts

Total Economy



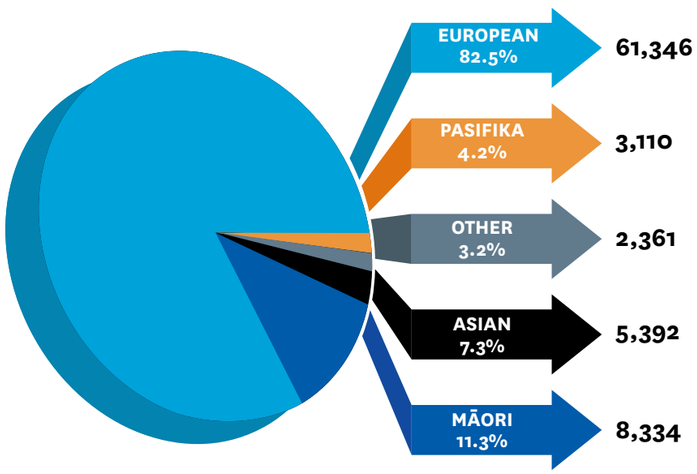
Age

The age profile across our industries is similar to that of the total economy. The average age of sport, recreation and performing arts professionals in 2013 was 41, compared with 43 in the total economy. Our industries have a significantly higher number of 15 to 24-year-old employees compared to the total economy.



Ethnicity

The majority of people working in our industries identify as Pakeha/NZ European (82.5%). People identifying as Māori accounted for 11.3% of employees in 2013. Pasifika peoples made up 4.2% of all workers in our industries in 2013. Despite these numbers being very low, they are on par with the total economy, at 11.1% and 4.9% respectively. The workforce has seen a steady growth in employees who identify as Asian, increasing from 6% in 2006 to 7.3% in 2013.



[2] Full-time equivalent (FTE) employment is a way of looking at employment that takes into account the workload of people in employment. FTE employment measures the number of people in employment for 40 hours or more per week. Two people who are employed part-time are measured as one FTE. Using FTEs instead of employment to look at change over time can provide a more consistent comparison of labour resources used in employment.

Skill level[3]

In 2016, our industries had a smaller proportion of low-skilled occupations (28%) than the total economy (38%). There were 38% highly-skilled occupations in our industries in 2016, compared with 33% of the total economy.

Earnings

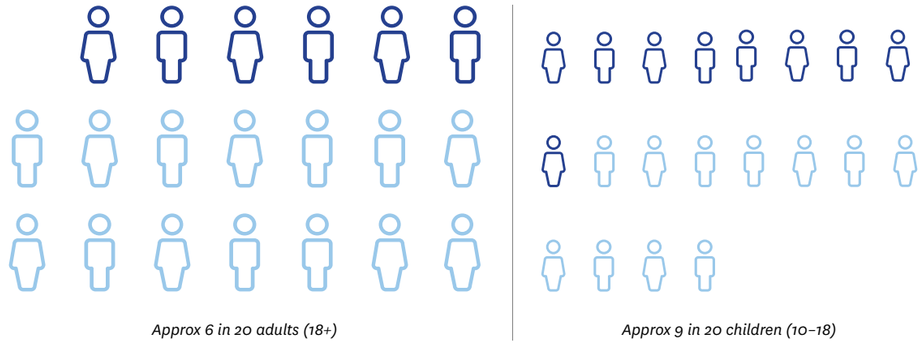
While average earnings across the various industries have increased over the past decade, in 2016 they were still 12% behind the average earnings in the total economy. The reality is that the part-time and often seasonal nature of these industries sees many earning less than this. The figures are also skewed by the relatively high salaries paid to professional sportspeople, high-performance coaches and senior executives across the industries.

Kiwis love to volunteer their time

Almost a million New Zealand adults[4] and around 45% of all boys and girls aged 10–18[5] volunteer in our industries each year. That volunteer contribution was conservatively valued at $1.03 billion in 2015.[6]

Unlike other countries, volunteering in New Zealand is growing. The 2014 ActiveNZ survey showed that there has been a 21% increase in the number of volunteers giving their time and energy to sport and recreation since 2008.[7] However, the survey also shows there is a marked decline in the hours people volunteer.

For many organisations, volunteering is largely what sustains their activities and ensures ongoing safe and enjoyable experiences for their participants. This can also place them under considerable financial pressure, to meet the cost of training and retaining those volunteers.



[3] Highly-skilled occupations typically require a bachelor degree or higher qualification. Medium-high-skilled occupations typically require an NZ Register Diploma, an Associate Degree or Advanced Diploma. Low-skilled occupations typically require an NZQA Level 3 qualification or lower. [4] Sport NZ ActiveNZ Survey 2013/2014 [5] Sport NZ Young People's Survey 2010/2011
[6] Dalziel, Paul, 2015, The Economic and Social Value of Sport and Outdoor Recreation to New Zealand: Updated Data, for Sport NZ AERU, Lincoln University [7] Sport NZ ActiveNZ Survey 2013/2014

44%

56%

Over half of all New Zealanders take part in some form of physical activity each week

Value to New Zealand

In 2016, the sport, recreation and performing arts industry's contribution to GDP was valued at $6.69 billion, or 3% of New Zealand's GDP. When the value of all volunteers is included in the total economic contribution of sport, recreation and performing arts that figure amounts to nearly $7.6 billion.

Of this overall contribution, the performing arts industry added $2.058 billion; the sport and community recreation industry contributed $2.34 billion; the exercise industry $420 million; the outdoor recreation industry $727 million; and dive, with a comparatively smaller workforce, contributed $30 million to New Zealand's GDP in 2016.

All of our industries promote an active lifestyle, with some 2.5 million New Zealand adults taking part in some form of physical activity each week.[8] Lack of physical activity is a significant driver of heart disease, stroke, cancer and other leading causes of death in this country. In response, there have been a number of government-funded interventions over the years supporting increased physical activity for good health outcomes.[9]

On top of contributing to physical health, our industries provide social benefits by bringing people together, building skills, and fostering a sense of community and belonging.

All industries that Skills Active works with, with the exception of exercise, make substantial contributions to either international or domestic tourism. A significant number of international tourists flock to New Zealand every year to enjoy the wide range of sport, recreation and performing arts activities. The opportunity to engage with the natural environment, provided by the outdoor recreation, dive and snowsport industries especially, draws in many visitors. On top of this, events provided by the sport and performing arts industries, such as concerts and international tournaments, provide a boost of domestic and international visitors who contribute to the economy. Sport-based tourism is strongly linked with solid visitor spending on accommodation and attractions beyond the main event.[10, 11]

[8]Sport NZ ActiveNZ Survey 2013/2014 [9]College of Public Health Medicine press release, 2015 [10]Lions Tour games boost economy significantly, NZ Herald, July 2017
[11]Press release: World Masters Games brings in $63 million, Jonathan Coleman and Simon Bridges, August 2017

Trends/Issues/Risks

POLITICAL

Health and safety responsibilities

Meeting the requirements of the recently enacted health and safety legislation is an issue identified across all industries. Many smaller businesses and organisations are struggling to manage the documentation and procedural requirements.[12]

Increased funding

With increased recognition of our industries' impact on wellbeing, the government is increasing funding for initiatives that draw clear links between physical activity and social, emotional and psychological benefits for New Zealanders.[13]

The government is also directing an extra $100 million in funding toward tourism infrastructure in outdoor recreation hotspots, to support the increasing number of domestic and international visitors that our industries attract.[14]

High-risk industry

The arts and recreation services industry, which includes categories such as sports professionals, dancers and outdoor adventure operators, had the highest rate of injury in 2016, with 196 ACC claims per 1,000 full-time equivalent employees (FTEs). This compares to the 107 claims per 1,000 FTEs in the total economy.[15]

BY INDUSTRY, THE ANNUAL CONTRIBUTION TO GDP WAS:

Sport and Community Recreation – $2.343 billion, which equates to 1.0% of GDP. Up 0.69% from 2015.

Exercise – $420 million, which equates to 0.2% of GDP. Down 4.9% from 2015.

Outdoor Recreation – $727 million, which equates to 0.3% of GDP. Down 0.7% from 2015.

Performing Arts – $2.058 billion, which equates to 0.9% of GDP. Up 3.6% from 2015.

Dive – $30.2 million, which equates to 0.01% of GDP. Up 3.8% from 2015.

Sport and Community Recreation
$2.343b
1.0% OF GDP

Exercise
$420m
0.2% OF GDP

Outdoor Recreation
$727m
0.3% OF GDP

Performing Arts
$2.058b
0.9% OF GDP

Dive
$30.2m
0.01% OF GDP

Pan-industry
$840m
0.31% OF GDP

Pan-industry figures include workforce that do not fit neatly into the other industry categories above.

Total Sport, Recreation and Performing Arts Industry
$6.685b
3.0% OF GDP

[12]Small businesses still getting to grips with new health and safety law, Stuff, 2016 [13]Shift: encouraging physical activity & wellbeing, Wellington City Council, www.wcc.govt.nz
[14]Budget 2017: Tourism Infrastructure Package, Ministry of Business, Innovation and Employment, May 2017 [15]Arts and recreation services industry has highest injury rate, Statistics New Zealand, 2017

SOCIAL

Expanding sport and recreation options

With an increasingly diversifying and ageing population, the onus is on our industries to continue expanding and refining the range of recreation options available, in order to meet the needs of all cultures, preferences, health conditions and life stages.[16, 17]

Wellbeing in the outdoors

As in other areas of sport and recreation, the outdoor recreation industry is part of an ongoing conversation about creating well-being for New Zealanders. Outdoor recreation organisations are calling for greater recognition of the social and mental benefits of time spent in natural environments.[18]

Need for increase in cultural diversity

While the sport and recreation industry is an area that Māori excel in[19], those who identify as NZ European/Pakeha still dominate our industries. There is a need for a higher workforce representation of all ethnicities across all of our industries that make up New Zealand, and especially those who identify as Māori and Pasifika.[20]

TECHNOLOGICAL

Use of technology

Technology continues to play an influential role across all industries, both in regard to opening up new opportunities and changing skill requirements due to technological replacements.

Social media marketing

While screen-time is increasingly competing with time spent being active, many businesses in the sport and recreation industry are using social media as a marketing tool to attract and engage social media-savvy users with their industries.

[16]Active Older People Discussion Document, Sport NZ, www.sportnz.org.nz [17]Connecting With Diversity, Auckland Sports Toolkit, www.connect2sport.org.nz [18]Advocacy Priority One: Greater Recognition of the Economic and Social Value of Recreation, New Zealand Recreation Association, www.nzrecreation.org.nz [19]Active New Zealand Survey, Sport New Zealand, 2015 [20]Workplace Survey, Skills Active, 2017

Training environment

Many occupations in our industries require specific technical skills. This is reflected in the fact that our industries have a larger proportion of highly-skilled occupations (38%) than the total economy (33%). Despite this, 41.9% of those working in our industries held no post-school qualification in 2013.

With many practical jobs across our industries, on-job training is an effective way of developing skilled employees. On-job training is delivered through a combination of in-house learning and collaboration with other providers, such as industry training organisations.

BARRIERS TO INDUSTRY TRAINING AND QUALIFICATION COMPLETION[21]

Key barriers to industry training and qualification completion identified across all industries link to the makeup of the industries, and include:

- Access and availability of suitable training
- The financial cost of training staff
- High staff turnover
- Staff and employers unable to see return on investment, due to the proportion of part-time, volunteer and contract employees.

CURRENT AND FUTURE SKILL NEEDS[22]

Common skill gaps across our industries include:

- Technical skills
- Customer service
- Training in new technology
- Management and supervision.

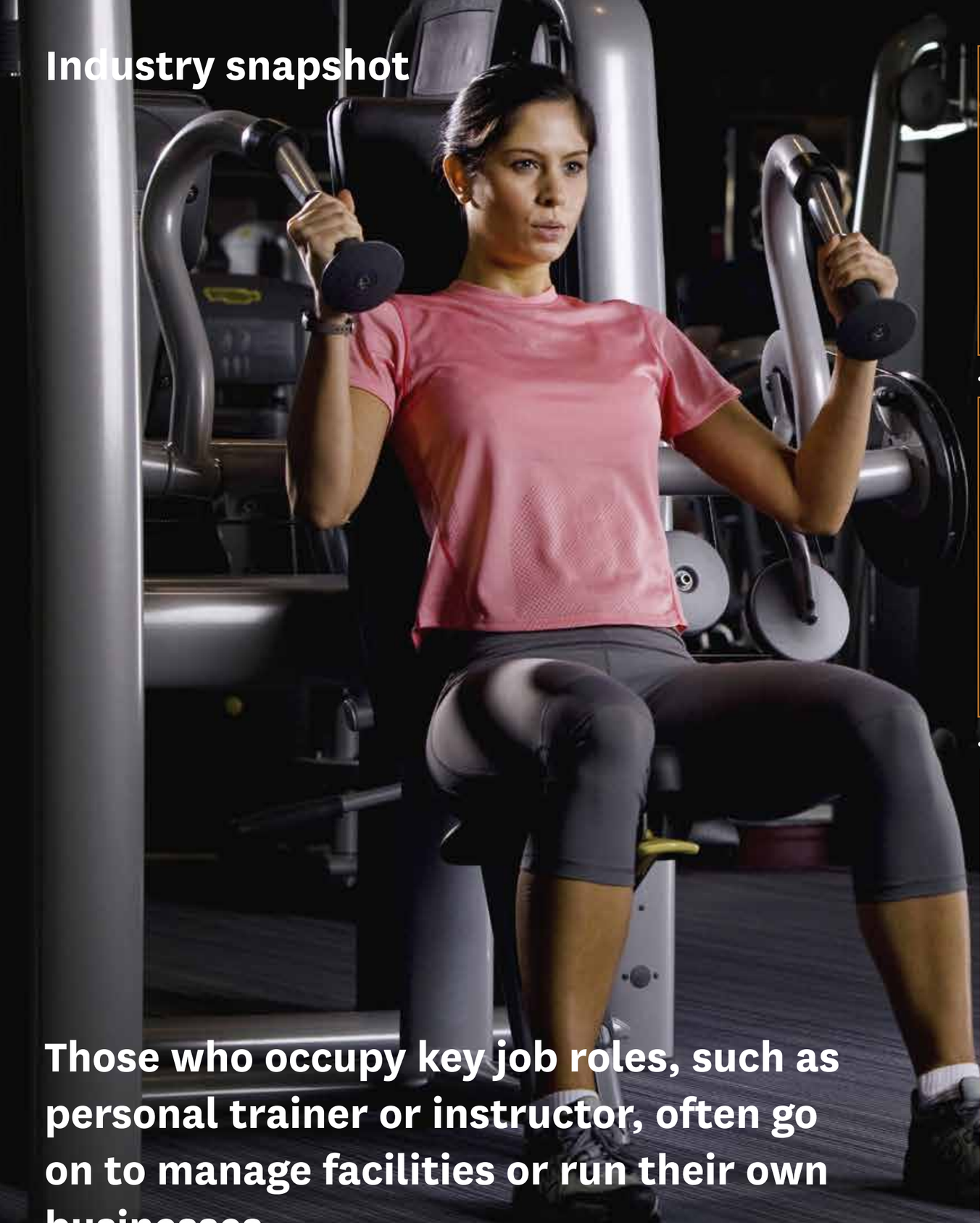
Detailed accounts of the impact and trends within the industries are provided in the workforce scan sections.

[21]Workplace Survey, Skills Active, 2017 [22]Workplace Survey, Skills Active, 2017

Exercise

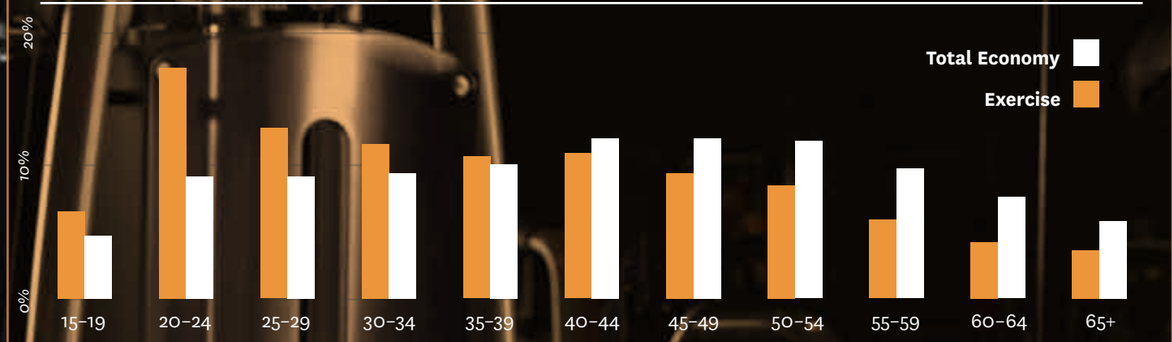
Regular exercise brings physical, emotional and social benefits. The professionals in this industry are teaching, supporting and leading people, as they take part in activities that increase their overall wellbeing. Those who occupy key job roles, such as personal trainer or instructor, often go on to manage facilities or run their own businesses as they progress in their careers.

Industry snapshot



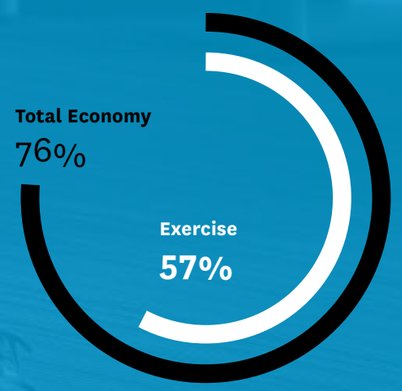
Those who occupy key job roles, such as personal trainer or instructor, often go on to manage facilities or run their own businesses

AGE



EMPLOYMENT BY GENDER - 2016

PERCENTAGE WORKING FULL-TIME - 2013



Percent working 40 hours or more per week

ECONOMIC CONTRIBUTION

$420M GDP

0.2% of New Zealand's GDP in 2016

Industry profile

The exercise industry is highly competitive, featuring everything from boutique businesses and community providers through to national gym chains and council-owned facilities. Increasing links between exercise and health are driving ongoing growth in non-profit operators.

In 2016, there were 61 more business units than in the previous year, bringing the total business units in the exercise industry to 1,570. The growth in business units in the industry over the past five years (averaging 6.9% per annum) has been greater than the growth in business units in the total economy, which averages 1.5% per annum.

The average number of employees per business unit in the exercise industry decreased from 5.3 employees in 2011 to 4.2 employees per business unit in 2016. Over the same period, the average number of employees per business unit in the total economy increased from 4.2 to 4.3.

The Exercise Association of New Zealand estimates that there are between 400 and 600 health and fitness centres in New Zealand. Around one-third are specialist studios, such as those offering Pilates, yoga and personal training, with the remainder being traditional centre models. Some 40 councils and five regional sport trusts own or manage exercise facilities.

Industry structure

LOCAL AUTHORITIES (COUNCILS)

Typically, Council leisure centres provide a range of services including a gym and exercise classes. These may be run by commercial contractors or non-profit organisations such as YMCA.

COMMERCIAL ORGANISATIONS

Gym chains with multiple branches, such as Les Mills, Jetts, City Fitness and Just Work Out. Regional and local gyms, individual personal training services, yoga studios, etc.

OTHER

Community exercise providers, including churches, marae, community groups, walking groups, weight loss organisations, etc.

In 2016, there were 61 more business units in the exercise industry than in the previous year

Workforce profile

There were 6,539 people employed in the exercise industry in 2016, or 0.3% of the total national workforce.

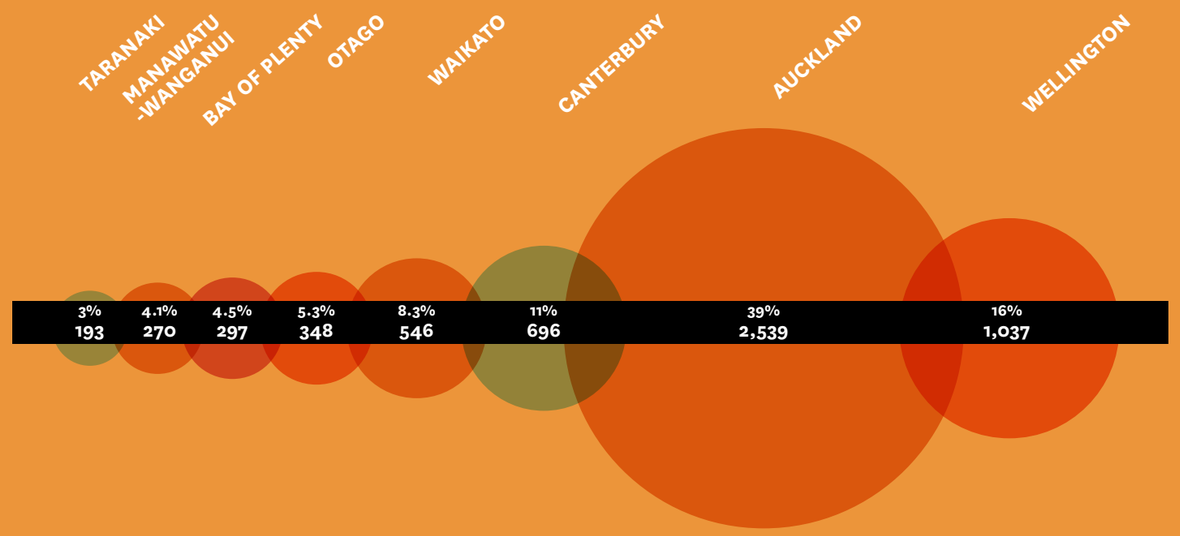
Between 2011 and 2016, employment in the exercise industry grew by an average of 1.9% per annum – this is the same employment growth as the total economy over the same period. In the two years to 2016, however, employment in the exercise industry dropped by 1.6%. This contrasts with employment growth of 2.7% in the total economy over the same period. The reason for the drop may be attributed to the market moving towards using contracted, rather than permanently employed personal trainers and group fitness instructors.

Exercise industry employment is forecast to grow at an average of 1.1% per annum between 2016 and 2021. This is slower than the predicted employment growth rate for the total economy of 2.3% per annum.

Employment growth in the exercise industry has decreased since 2014, and future growth is expected to be slower than the growth rate of the total economy

REGIONAL EMPLOYMENT

In 2016, of the 6,539 people working in the exercise industry, 39% were based in the Auckland region. In contrast, 16% were based in the Wellington region and 10% in the Canterbury region. Between 2011 and 2016, employment in the exercise industry grew by 3.4% per annum in the Auckland region. In the same period, the Otago region saw regional employment in the exercise industry grow by 4.8% per annum.



TOP FIVE JOBS BY VOLUME - 2016

FITNESS INSTRUCTOR

RECEPTIONIST (GENERAL)

FITNESS CENTRE MANAGER

OTHER SPORTS COACH OR INSTRUCTOR

CORPORATE GENERAL MANAGER

Workforce makeup

TYPE OF EMPLOYMENT

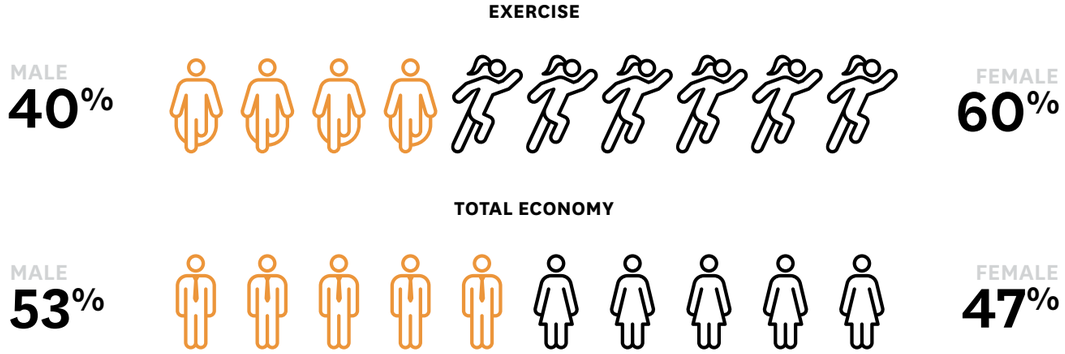
In 2016, 19% of the exercise industry was self-employed. This segment of the workforce has grown, and for the second year in a row was higher than the total economy's self-employment rate of 18%.

From an industry perspective, this may well reflect the increasing number of personal trainers and businesses working outside of traditional fitness centres, and using parks and open spaces to run their businesses.

The market has steadily moved towards using contracted, rather than permanently employed personal trainers and group fitness instructors

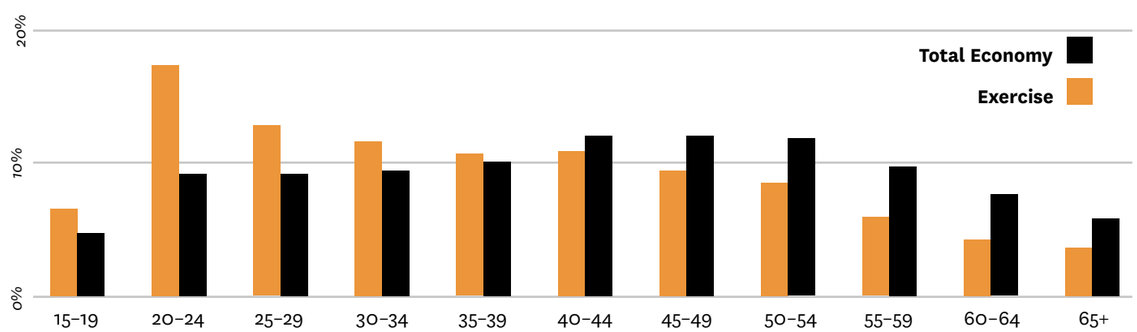
GENDER

In 2016, 60% of exercise professionals were women. While this is considerably higher in proportion to the 47% of females employed in the total economy workforce, it is a decrease from 2013 when 62% of the exercise workforce was female.



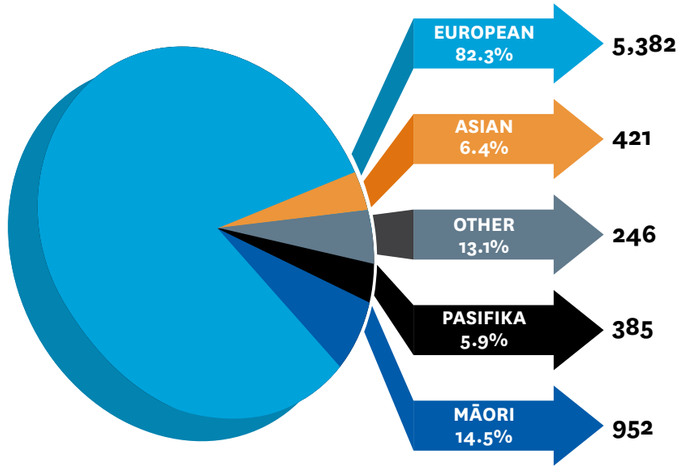
AGE

The exercise industry is a younger workforce compared with the total economy. In 2013, the average age of people in this industry was 38 years compared to 43 years in the total economy. There are nearly twice as many 20-24-year-olds working in the exercise industry than in the total workforce.



ETHNICITY

In 2013, some 82% of people working in the exercise industry identified as NZ European/ Pakeha, compared with 77% in the total workforce. People identifying as Māori accounted for 14.5% of the exercise industry's workforce, Asian people 6%, and Pasifika people 5.9%. The proportion of Māori and Pasifika people in the industry is high compared with their representation in the total economy (11.1% and 4.9% respectively).



SKILL LEVEL[23]

In 2016, there were fewer low-skilled occupations in the exercise industry (15%) than in the total economy (38%). The exercise industry also had fewer highly-skilled occupations (13%) than the total economy (33%).

EARNINGS

Average annual earnings for an exercise professional in 2016 were $34,200, which is considerably less than the national average earnings of $57,780.

Annual average earnings in the exercise industry have grown at a faster rate (3.6%) than the total economy (3.4%) over the past 10 years.

It is important to note that exercise professionals typically worked shorter hours than the average for the total workforce in 2013. Only 57% of people in the exercise industry worked 40 hours or more per week, compared with 76% of the total workforce.

Personal trainers and Pilates and yoga instructors can typically earn $40 to $65 per hour, but will often work much fewer than 40 hours a week.

[23] *Highly-skilled occupations typically require a bachelor degree or higher qualification. Medium-high-skilled occupations typically require an NZ Register Diploma, an Associate Degree or Advanced Diploma. Low-skilled occupations typically require an NZ Register Level 3 qualification or lower.*

Impact

Gym membership grew 32% between 2008 and 2013

The exercise industry contributed $420 million to New Zealand's GDP in 2016, or 0.2% of overall GDP. Over the five years to 2016, GDP in the industry grew by an average of 1.5% per annum, compared to 2.5% per annum in the economy as a whole. From 2015 to 2016, GDP in the exercise industry dropped by 4.9%, while GDP growth in the overall economy increased by 2.5%

As well as reducing risk factors for type 2 diabetes and cardiovascular disease, exercise is linked with improved mental health and a lower likelihood of degenerative brain diseases.[24]

Low physical activity accounted for just under 3% of all illness, disability and premature mortality in 2013.[25] Not only does this have implications for population health but also for the economy. A 2013 study found the total cost of physical inactivity to be $1.3 billion in that year.[26]

Gym membership grew 32% between 2008 and 2013. This trend continued, leading to 15.6% of the New Zealand population holding a gym membership in 2016.[27]

Outside fitness centres, boot camps and community exercise groups also provide an opportunity for people to exercise in a social setting. Church, marae, and community fitness programmes have grown in the last few years, and provide lower-cost options, in environments where users may feel more comfortable than they would in traditional gyms.

Economic Contribution

$420M GDP

0.2% of New Zealand's GDP in 2016

Fiona Goff
Chair of the Exercise Industry Advisory Group (IAG)

One of the main issues discussed by the Exercise IAG was the need for more qualified exercise professionals working in the industry, to meet the demand of our growing, changing population.

Our society is rapidly growing older, becoming more sedentary, and becoming increasingly obese. We need a workforce that is qualified to responsibly promote a physically active life.

The workforce needs to be more holistic, and more focused on the development of the whole person. We need exercise professionals who have a good understanding that the industry is not just about weight loss and how you look; it's about leading a physically active and healthy lifestyle.

If we all had our own qualified lifestyle coach who had this understanding, we would be a lot healthier and happier.

[24] *Reducing the Risk, Alzheimer's New Zealand, www.alzheimers.org.nz* [25] *New Zealand Health Survey, 2015/16* [26] *The costs of physical inactivity: towards a regional full-cost accounting perspective, Market Economics Limited, 2013* [27] *Workout industry bulks up: Gym business worth $494 million, The Herald, 2017*

Trends/Issues/Risks

POLITICAL

Client safety during unstaffed hours

Like all businesses, exercise facilities now have greater responsibilities under the law to keep staff and clients safe. In 24-hour gyms, the requirement to keep clients safe during unmanned hours is demanding new practices and procedures, and more documentation. Exercise New Zealand helps members with advice on best practices, and has developed guidelines for 24-hour gyms.

There is an increased focus on the safety of users of facilities in the exercise industry, which has driven the development of a new national quality assurance scheme, launched in late 2017.

ECONOMIC

Fierce competition

Recent years have seen explosive growth in 24-hour gyms, and the advent of cut-price fees to entice new users.[28] The large end of the market is consolidating, with a small number of large chains making up some of the biggest gyms in New Zealand[29], while new and innovative operators such as Patu Aotearoa and Māori Movement continue to enter the arena.

'Niche-ing' of the Small Medium Enterprise market

On a related note, small providers are increasingly having to deliver highly unique value propositions to stay relevant, while generalist exercise providers in the middle are being squeezed by the ultra-low fees model used by their larger rivals.

SOCIAL

Health at every size

Body positivity activists are pushing for a greater focus on exercise for health, rather than weight loss, and arguing that overweight and obese bodies can be healthy[30, 31] – challenging some of the elements of one of the government's key public health initiatives, to reduce childhood obesity.[32]

Widening scope of client expectations

Fitness professionals are increasingly being asked to provide nutritional advice, which may fall outside their scope of practice.[33] Many clients expect trainers to care for the whole person and offer guidance on diet, as well as sleep, stress, physical rehabilitation and much else.

Social media marketing

Exercise businesses are often at the forefront of social media marketing, in a bid to capture the attention of a sophisticated and social-savvy customer base.

Care of older demographic

With the ageing population comes a greater demand for nursing home staff to work alongside exercise instructors, physios and occupational therapists to support this older population's physical activity and wellbeing.

TECHNOLOGICAL

Ongoing advances in technology

As well as the continuing growth in fitness trackers, online classes and personal training services, gyms are chasing new customers using virtual and augmented reality tools.[34]

Low-tech exercise

Exercise is increasingly being prescribed via non-equipment programmes, driven by the thriving popularity of back-to-basics style exercise classes like CrossFit and F45.[35]

Rapid speed of research and trends

Exercise professionals are facing a constant stream of new products, trends and research,[36] and are striving to process this information critically and pass on the valid and useful knowledge to clients while filtering out unproven claims and fads.

[28] *Workplace Survey, Skills Active, 2017* [29] *Workout industry bulks up: Gym business worth $494 million, The Herald, 2017* [30] *Dollar E, Berman M, Adachi-Mejia AM. Do No Harm: Moving Beyond Weight Loss to Emphasize Physical Activity at Every Size, 2017* [31] *Bombak A. Obesity, Health at Every Size, and Public Health Policy. Am J Public Health. 2014;104:e60–e67.* [32] *Childhood Obesity Plan, Ministry of Health, www.health.govt.nz* [33] *Should you take nutrition advice from your personal trainer? Fairfax, September 2016* [34] *"The Trip" group fitness, Les Mills, www.lesmills.co.nz* [35] *CrossFit – cult or community? Stuff.co.nz, 2015* [36] *Press release: Top Fitness Trend for 2017 is Wearable Technology, American College of Sports Medicine, October 2016*

Training environment

Over 40% of people working in the exercise industry have a level 5 diploma or higher. Some 26.5% have a bachelor's degree or higher. Both figures are higher than the average for the total economy.

The need for educated, certified and experienced exercise professionals consistently ranks in the top five trends in the Worldwide Survey of Fitness Trends.[37]

Exercise qualifications are available from numerous education providers including polytechnics, universities and private training establishments. However, the 'work-readiness' of graduates remains a concern for employers.[38]

On-job training remains an important part of the skills framework for the industry. For many employers in the industry, on-job training is delivered in-house or in collaboration with other providers, such as industry training organisations.

BARRIERS TO INDUSTRY TRAINING AND QUALIFICATION COMPLETION[39]

Barriers to training and completing qualifications are mainly linked to the make-up of the industry:

- Small-to-medium businesses
- Relatively young workforce
- High proportion of part-time and contract staff
- Relatively low earnings, but high expectations of younger staff
- Lack of in-house assessment options in small organisations.

On this basis, the main barriers to staff undertaking and completing qualifications are:

- Cost of training and assessment
- Busy schedules and multiple time commitments
- Access to and availability of suitable training, qualifications and assessors
- High staff turnover
- Limited workplace training capability and/or coordination.

CURRENT AND FUTURE SKILLS NEEDS[40]

Many gyms and exercise businesses are launched by personal trainers wishing to take their careers to the next level. In some cases, these fledgling owner-operators have the passion and drive required, but not the business skills, and they need to add these to their repertoire.

The industry has identified the following current and future skill needs:

- Management and supervision skills
- New technology and technical skills
- Marketing and sales skills
- All skills covered by existing training will remain critical.

With changing demographics and the increasing focus on the role of exercise in health, specific, cost-effective training in the following areas will also be necessary:

- Interpersonal skills to deal with a breadth of people – health professionals through to elderly clients
- Communication skills with different ethnic groups including Māori, Pasifika and Asian
- Knowledge of specific health conditions and appropriate responses to them – obesity, heart disease, type 2 diabetes, different cancers
- Business management and marketing – these skills will be especially important for personal trainers in an increasing environment of self-employment.

[37] *Worldwide Survey of Fitness Trends 2017: ACSM'S Health & Fitness Journal: November/December 2016 - Volume 20 - Issue 6 - p 8–17*
[38] *Workplace Survey, Skills Active, 2017*
[39] *Workplace Survey, Skills Active, 2017*
[40] *Workplace Survey, Skills Active, 2017*

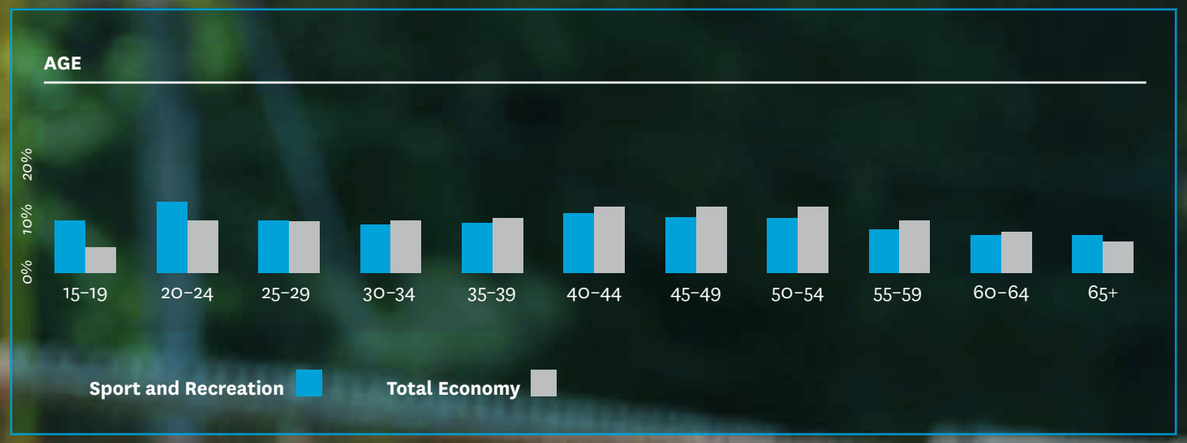
Sport and Community Recreation

Sport and community recreation brings New Zealanders together, and helps to promote an active and healthy population, individual wellbeing and resilience, and cohesive communities. Sport and community recreation professionals are required to develop a range of transferable skills including self-management, planning, leadership, goal-setting, perseverance and teamwork.

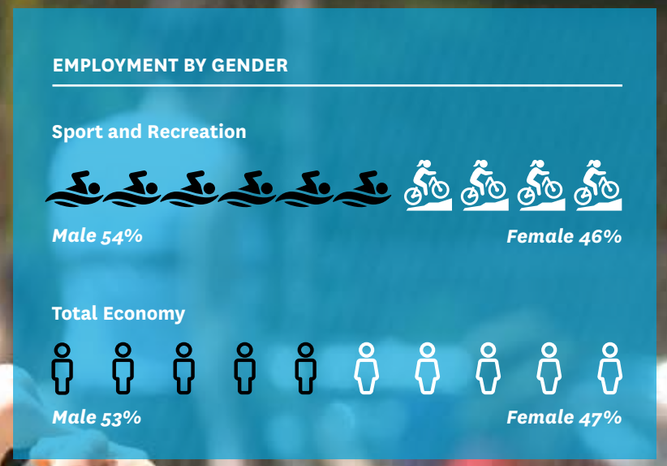
Industry snapshot

Sport and community recreation in New Zealand promotes an active and healthy population, individual wellbeing and resilience, and cohesive communities

AGE



EMPLOYMENT BY GENDER

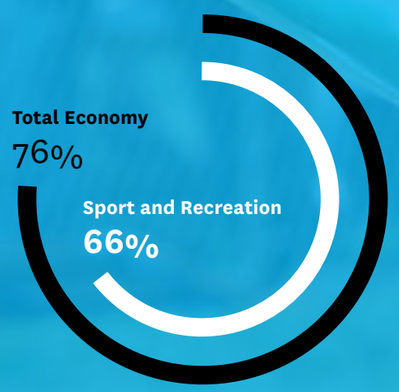


ECONOMIC CONTRIBUTION

$2.343B GDP

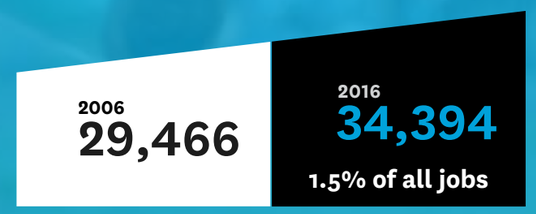
1.0% of New Zealand's GDP in 2016

PERCENTAGE WORKING FULL-TIME - 2013



Percent working 40 hours or more per week

FILLED JOBS IN INDUSTRY



Industry profile

The sport and community recreation industry encompasses non-profit, private and government organisations, from grassroots through to national bodies. The work of these organisations can be grouped into three streams: facilities such as swimming pools, parks and open spaces; the management and delivery of sport and recreation programmes and/or events; and coaching/officiating of teams and individual athletes.

There were 10,931 business units in the sport and community recreation industry in 2016, up from 10,481 five years earlier, an average increase of 0.8% per annum. Business unit growth over this period was lower than in the total economy (1.5% per annum).

TWO MAJOR INDUSTRY GROUPS

LOCAL AUTHORITIES (PRIMARILY COUNCILS)

Councils employ a significant proportion of the industry, spending some $800 million annually on delivering sport and community recreation, and maintaining an estimated $7 billion worth of assets.[41] Integral to local government delivery of sport and recreation are the various council-controlled organisations and commercial businesses working out of council-owned facilities.

SPORT AND RECREATION PROVIDERS

More than 200 national and regional sport and recreation organisations, 14 regional sports trusts, and some 15,000 clubs deliver sport and recreation and services, along with non-incorporated societies and non-profit trusts, out-of-school caregivers, Pasifika church and community groups, iwi and hapū, and health services. Some providers are commercial businesses, including Kelly Sports, Belgravia and Community Leisure Management.

Integral to local government delivery of sport and community recreation are the various council-controlled organisations and commercial businesses working out of council-owned facilities

[41] *Economic and Social Value of Sport and Recreation - Sport NZ, 2014*

Government/Community Funding Organisations

Sport New Zealand
Ministry of Culture and Heritage
Te Puni Kōkiri
Ministry of Education
Ministry of Business Innovation and Employment
Ministry of Health
Ministry of Social Development
Internal Affairs (Lotteries)
Gaming trusts
Community trusts
Philanthropic trusts
Commercial sponsorships
Tertiary Education Commission

National Organisations

NZ Recreation Association
Local Government New Zealand
Water Safety New Zealand
National Sport Organisations
National Recreation Organisations

LOCAL AUTHORITIES (COUNCILS)

Wet and dry facilities, sport grounds, entertainment and event venues, arenas and stadiums, parks and open spaces, out-of-school care operators, recreation programmes and events.

SPORT AND RECREATION PROVIDERS

National, regional and local sports organisations, regional sport trusts, schools, commercial operators e.g. CLM, not-for-profit e.g. YMCA.

VOLUNTEERS

Community sport coaches, officials, administrators and programme or event personnel.

Marae-based sport and recreation activities.

Participants

Workforce profile

TOP FIVE JOBS BY VOLUME

OTHER SPORTS COACH OR INSTRUCTOR

4,336

GREENKEEPER

3,322

SWIMMING COACH OR INSTRUCTOR

2,635

LIFEGUARD

1,776

SPORTS ADMINISTRATOR

1,583

Paid employment in the sport and community recreation industry reached 34,394 in 2016, compared to 23,811 in 2000. Employment in the sport and community recreation industry is forecast to grow to 41,062 by 2021.

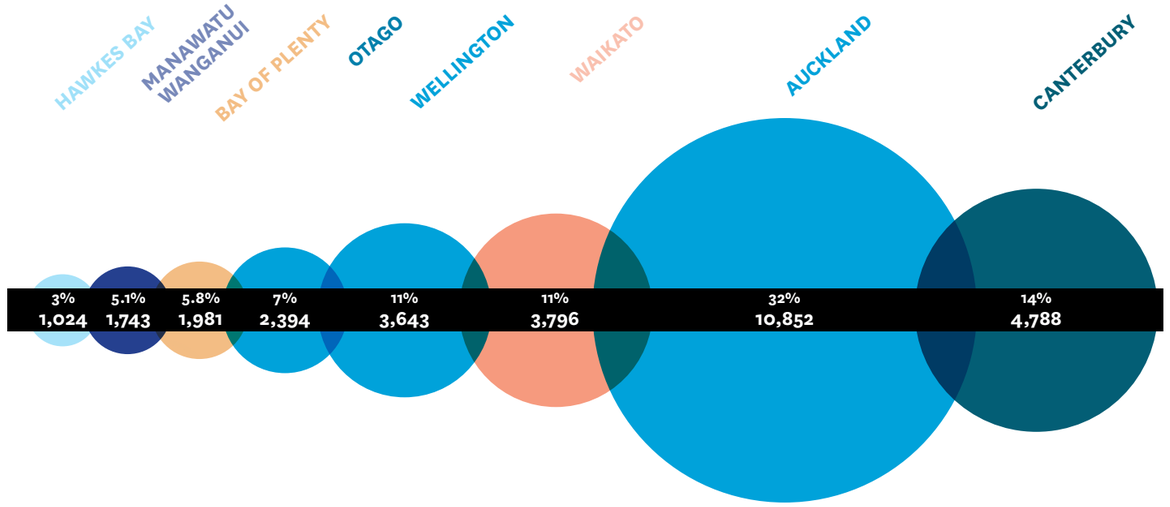
Between 2011 and 2016 employment in the sport and community recreation industry grew by an average of 1.4% per annum, compared with total employment growth of 1.9% per annum.

However, in the two years to 2016, employment growth in the sport and community recreation industry was higher than the total economy (3.2% per annum compared to 2.7% per annum in the total economy).

According to the Skills Active Workplace Survey, coaches, swim instructors and lifeguards were among the most difficult roles to recruit for the industry in 2017.

REGIONAL EMPLOYMENT

Of the 34,394 people employed in the industry in 2016, the majority were employed in the Auckland region.



Workforce makeup

GENDER

There were fewer female than male workers in the sport and community recreation industry in 2016. Females accounted for 46.5% of employment in the industry. The proportion of female workers increased from 41.3% to 46.5% between 2001 and 2016. Over the same period, the proportion of females in the total economy increased from 45.5% to 47.2%.

TYPE OF EMPLOYMENT

Of the 34,394 people employed in the sport and community recreation industry, 66% worked full-time hours in 2016. The number of full-time equivalent (FTE) employment numbers in the industry reached a new high at 29,006 in 2016.[42] The number of FTEs in the industry grew by 1.8% per annum over the five years to 2016.

In addition to the paid workforce, the industry is supported by over one million volunteers – a number which has only been increasing over the years.[43] Many volunteers help out with events and coaching.[44] However, the turnover of volunteers is high. This often reflects the fact that many adult volunteers are supporting sport and community recreation activities for their children, and they typically do not volunteer beyond their children's involvement.

In 2016, 16% of the industry was self-employed. Despite the fact that the industry's self-employment rate has increased over the past five years, this number is still lower than the total economy's self-employment rate of 18%.

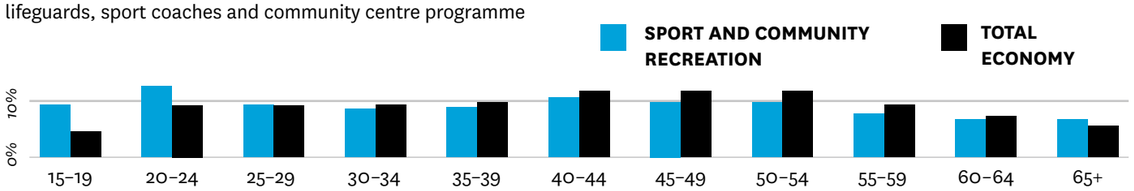
AGE

The industry has a young workforce, with 24% of employees aged 15–24 years old. This is 10% higher than the average national labour force in that age bracket.

With a young workforce, it is no surprise that 42% of respondents to the Skills Active Workplace Survey reported that they were actively working with schools to recruit staff.[45]

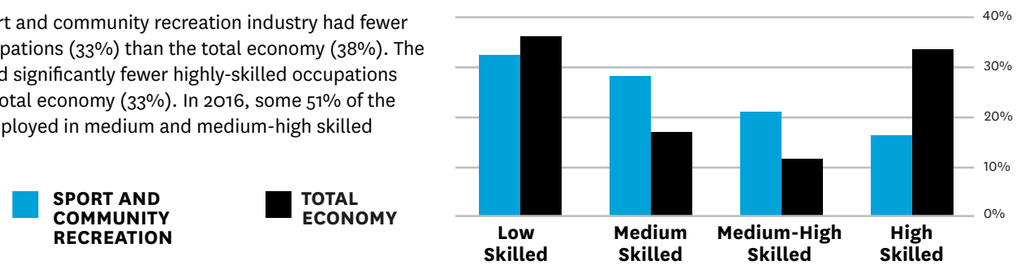
These figures may reflect the fact that roles such as pool lifeguards, sport coaches and community centre programme providers are often filled by young people who are still associated with the schools and youth groups to whom they are delivering services.

The number of people aged 65 years and over in the workforce increased from 4.6% in 2006 to 6.7% in 2013, similar to the total workforce, where this age bracket jumped from 3.3% to 5.8% over the same period.



SKILL LEVEL[46]

In 2016, the sport and community recreation industry had fewer low-skilled occupations (33%) than the total economy (38%). The industry also had significantly fewer highly-skilled occupations (17%) than the total economy (33%). In 2016, some 51% of the industry was employed in medium and medium-high skilled occupations.



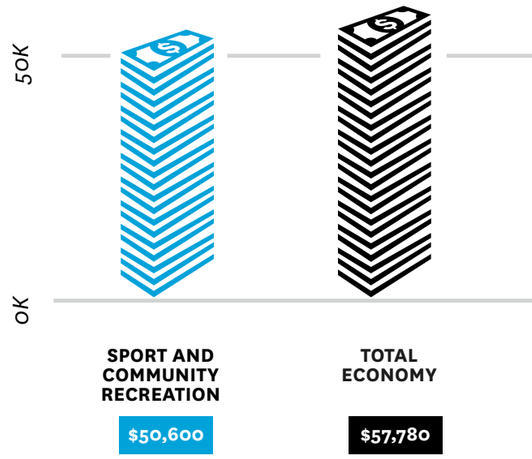
[42]Full-time equivalent (FTE) employment is a way of looking at employment that takes into account the workload of people into employment. FTE employment measures the number of people in employment for 40 hours or more per week. Two people who are employed part-time are measured as one FTE. Using FTEs instead of employment to look at change over time can provide a more consistent comparison of labour resources used in employment.
[43]Active NZ Survey, Sport NZ, 2013/14 [44]Workplace Survey, Skills Active, 2017 [45]Skills Active Workplace Survey, 2017 [46] Highly-skilled occupations typically require a bachelor degree or higher qualification. Medium-high-skilled occupations typically require an NZ Register Diploma, an Associate Degree or Advanced Diploma. Low-skilled occupations typically require an NZ Register Level 3 qualification or lower.

EARNINGS

The average annual earnings in the sport and community recreation industry were $50,600 in 2016 – lower than the average annual earnings in the total economy of $57,780. Industry earnings have grown at a slower rate than the total economy over the past 10 years.

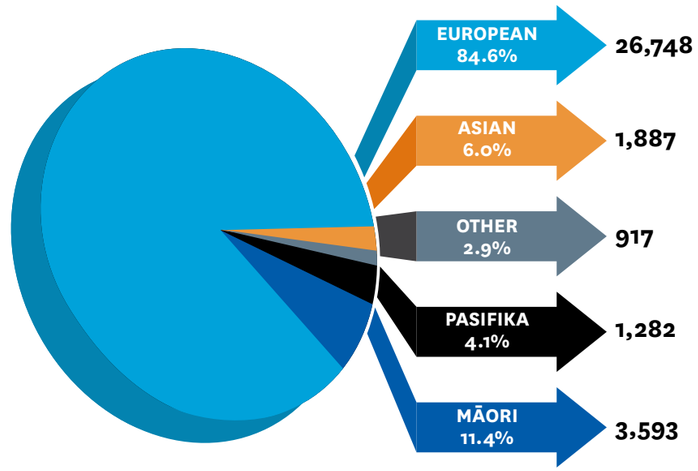
The salary extremes of high-performance coaches, professional athletes, planners and policymakers somewhat skew the earnings figures for the industry as a whole. The reality is that many sport and community recreation professionals work for small organisations that depend on public funding and philanthropic donations, and many work fewer than 30 hours a week.

According to Sport New Zealand's 2017 Paid Workforce Survey, the highest-earning employees in the industry are those employed by government agencies/crown entities and National Sports Organisations. Those employed in roles relating to high-performance coaching, high-performance programmes/campaigns and leadership and management also receive incomes well above industry averages. However, it is noted that people in these roles also typically work more hours per week.



ETHNICITY

In 2013, the majority (84.6%) of those working in this industry identified as NZ European/Pakeha. This percentage is higher than the 77.2% of people who identified as NZ European/Pakeha in the total economy. Those who identify as Māori made up 11.4% of the industry (compared to 11.1% of the total economy); Pasifika people 4.1% (compared to 4.9% of the total economy); and Asian people made up 6% of the industry (compared to 11% of the total economy). More effort needs to be placed in promoting viable career pathways and employment opportunities for these groups in the sport and community recreation industry.



Impact

The sport and community recreation industry contributed $2.343 billion to New Zealand's gross domestic product (GDP) in 2016. This equates to 1% of total GDP. In the five years to 2016, GDP in the sport and community recreation industry increased by 1.2% per annum.

New Zealand is an active nation, with people of all ages participating in sport and community recreation activities. The most popular activities of choice are walking, swimming, cycling and jogging, and these are often done recreationally. New Zealanders take part in a diverse range of sports, with the most popular being golf, football, tennis, netball, cricket, and rugby.[47]

Local sport clubs and recreation groups provide a range of social benefits for New Zealanders, providing a setting for social interaction, building skills, and fostering a sense of community and belonging.

Sport is a key driver of international and domestic tourism, with New Zealand playing host to the hugely successful Lions Tour and World Masters Games in 2017 and, before that, the 2015 Cricket World Cup, 2011 Rugby World Cup, and other international tournaments. Sport-based tourism is strongly linked with solid visitor spending on accommodation and attractions beyond the main event.[48, 49]

Economic Contribution

$2.343B GDP

1.0% of New Zealand's GDP in 2016

[47] *Active New Zealand Survey, Sport New Zealand, 2015* [48] *Lions Tour games boost economy significantly, NZ Herald, July 2017*
[49] *Press release: World Masters Games brings in $63 million, Jonathan Coleman and Simon Bridges, August 2017*

Trends/Issues/Risks

POLITICAL

Outsourcing of sport and community recreation in education

Primary and secondary schools are increasingly outsourcing aquatics and sport provision to external providers. Many school pools have been closed,[50] with swim education moved into community venues.

Quality assurance and the Vulnerable Children Act

There is significant variability in the standards, requirements and vetting applied to external sport and recreation providers, and an increased focus on quality assurance of both individuals and organisations. This is being driven in part by the obligations under the Vulnerable Children Act 2014[51] and 2015 health and safety legislation.

A continuing focus on obesity

Bringing down the national obesity rate remains a key government imperative, and sport and recreation programmes are a central platform of the national Childhood Obesity Plan.[52]

ECONOMIC

Health and safety compliance

Councils and large recreation providers are employing dedicated safety professionals to ensure they are meeting the requirements of the recently enacted new health and safety legislation. Many smaller businesses and organisations are struggling to manage the documentation and procedural requirements.[53]

Increased investment in wellbeing

Central and local governments are emphasising the concept of 'wellbeing' as a key outcome of sport and recreation programmes, and funding is being targeted at initiatives that draw clear links between physical activity and social, emotional and psychological benefits for New Zealanders.[54]

Amalgamating to survive

Traditional sports clubs are moving to the 'sports hub' model, and grouping together to offer a range of activities in one location.[55] This is helping to grow the member base and maintain viability at a time of declining participation in club sports.

Lesley Kidd
Administration Manager
Karaka Sports Park

In response to the declining membership of traditional sports clubs, an increasing number of multi-sports hubs are now being developed. The workforce has had to learn to adapt to this new operational model.

The Karaka Sports Park was set up in 1985. Different sports groups didn't have great facilities, so they came together and developed the multi-sports complex. When you join any of our codes, you automatically get membership to the Sports Park, and use of all of its facilities.

Our codes have expanded over time, but currently we have rugby, touch, tennis,cricket, baseball, netball, and a pilates group. Our clubhouse is also used for meetings; we hire our facilities out for functions; we have a cafe and bar, changing rooms, gear sheds and cricket nets. On a whole, we offer better facilities because we work together, and working together saves time and gives the clubs more money to operate their code and buy equipment.

Our membership has continued to increase over the years, and we have so many people who play a variety of sports. While you are down here playing tennis, you might meet someone who is doing cricket, so you might go and join them because you are mingling with each other.

The idea of a multi-sports complex is the way everyone is going now; it's what the councils are wanting to fund. So, we are way in advance, because we have been doing it for 32 years.

[50] *Save Our School Pools Campaign, Water Safety NZ, www.watersafety.org.nz* [51] *Vulnerable Children Act Requirements, Oranga Tamariki, www.mvcot.govt.nz* [52] *Press release: 15 indicators to help monitor childhood obesity, Jonathan Coleman, June 2017* [53] *Small businesses still getting to grips with new health and safety law, Stuff, 2016* [54] *Shift: encouraging physical activity & wellbeing, Wellington City Council, www.wcc.govt.nz*
[55] *Hubs and Sportvilles: Introduction, Sport NZ, www.sportnz.org.nz*

Trends/Issues/Risks

SOCIAL

A more individualistic and time-poor society

Membership of traditional sport clubs continues to decline.[56] New Zealanders are instead choosing to participate on their own schedule, through user-pays exercise or solo physical activity.

Busy households and the growing demand for both parents to work are also putting pressure on the volunteer workforce, specifically on the number of hours people are volunteering.

Access to play

Local authorities are emphasising the importance of development through unstructured play for children and young people, and channelling resources toward more open spaces for active recreation.[57, 58]

Shift in New Zealand sporting culture

Some of New Zealand's most popular sports, like rugby and netball, are decreasing in participation numbers. Meanwhile, other traditionally smaller sports, such as futsal and basketball, are gaining popularity. Motivating factors include: New Zealanders being more risk averse, and parents directing their children to activities with less risk of injury; the growing ethnic diversity seeing popularity of other internationally played sports on the rise; and our time-poor society, which is seeing people opting for quick, fast-paced and flexible activities that they can access at different times and places.

TECHNOLOGICAL

Screen time

Sport and community recreation continue to vie with streaming, gaming and computing, among other forms of sedentary recreation, for the leisure time of New Zealanders.

Capturing the social media audience

Sports clubs, both professional and grassroots, are continuing to use social media as a tool to engage their user base, whether members or spectators. Facebook live streaming, and Instagram stories are some of the newer techniques teams and clubs are using to capture fans through video.

[56] *Sports clubs tackle decline in player numbers; Radio NZ, July 2017*
[57] *Playgrounds of the Future; Hamilton City Council, www.hamilton.govt.nz*
[58] *Tākaro – Investing in Play Discussion Document, Auckland Council, www.shapeauckland.co.nz*

Training environment

In 2013, some 44.7% of people working in the sport and community recreation industry held a post-school qualification. Of these, 30% held a level 5 diploma and 20.6% held a bachelor's degree or higher. However, these qualifications may not be directly relevant to the industry.

On-job training in the industry is delivered through a combination of in-house learning and collaboration with other providers, such as industry training organisations.

BARRIERS TO INDUSTRY TRAINING AND QUALIFICATION COMPLETION[59]

The industry has identified cost as the biggest barrier to training and qualifying staff, particularly the cost of:

- Access and availability of suitable training
- Assessment of staff for organisations where in-house assessment is not available.

In addition to this, the industry reports the following as further barriers:

- High staff turnover
- Ability of the workplace to coordinate relevant training
- Staff personal commitments
- Lack of senior roles opening for staff to develop into.

CURRENT AND FUTURE SKILL NEEDS[60]

Sport and community recreation employers would like to see more training options in the following areas:

- Technical skills
  - Lifeguarding and swim coaching
  - Sport coaching
  - Facility operations
- Training in new technology
- Customer service and administration tasks
- Tikanga and Te Reo Māori
- Management
- Marketing and sales.

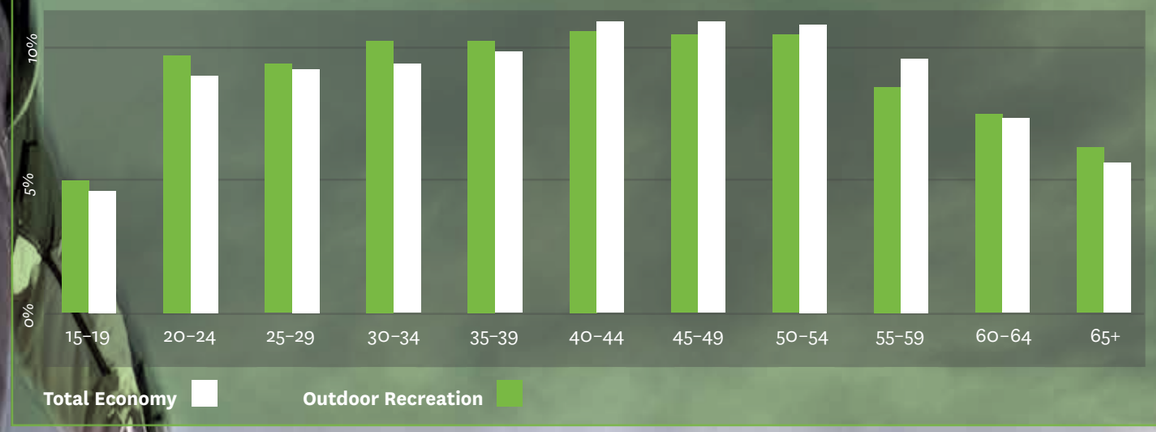
[59] *Workplace Survey, Skills Active, 2017*
[60] *Workplace Survey, Skills Active, 2017*

Outdoor Recreation

Outdoor recreation is central to the fabric of Kiwi life. The New Zealand landscape is the setting where outdoor recreation professionals guide, educate and instruct participants in a range of physical recreation activities.

Industry snapshot

EMPLOYMENT BY AGE



EMPLOYMENT BY GENDER

Outdoor Recreation

Male 55% *Female 45%*

Total Economy

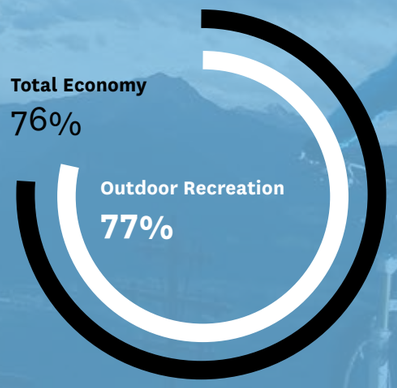
Male 53% *Female 47%*

ECONOMIC CONTRIBUTION

$727m GDP

0.3% of New Zealand's GDP in 2016

PERCENTAGE WORKING FULL-TIME - 2013



Percent working 40 hours or more per week

FILLED JOBS

2006	2016
9,016	10,822

Locals and tourists, both domestic and international, reap the myriad benefits of being active in our natural environment

Industry profile

The New Zealand landscape is the setting where outdoor recreation professionals guide, educate and instruct participants in a range of physical recreation activities.

Others use the outdoor medium for personal growth and development, corporate training, and education outside the classroom.

Locals and tourists, both domestic and international, reap the myriad benefits of being active in our natural environment. This drives the need for skilled adventure tourism guides, to ensure safety in an industry that makes a high contribution to New Zealand tourism.

In 2016, the industry comprised 2,585 business units, which is up from 2,450 five years earlier, but less than the 2,596 business units in 2015. With an average increase of 1.1% per annum over the five years to 2016, business unit growth has been slower than business unit growth in the total economy (1.5% per annum).

Many outdoor recreation businesses are incorporated societies or non-profit trusts, and often rely heavily on external funding. Many work with young people, including at-risk youth, and actively engage with those not in education, employment or training (NEETs).

Activities provided through outdoor recreation include:

TRAMPING
CAMPING
BIKING
FISHING
HUNTING
BOATING
MOUNTAIN SPORTS
ADVENTURE TOURISM
WATER SPORTS
4WD DRIVING
HORSE RIDING
OUTDOOR EDUCATION

The industry has three distinct groups:

OUTDOOR EDUCATORS
Councils, community groups and Christian camps offering outdoor experiences; schools and tertiary providers; and non-profit outdoor centres like Hillary Outdoors, Outward Bound or Whenua Iti.

COMMERCIAL OUTDOOR OPERATORS
Adventure tourism operators like Ultimate Descents, Skyline Rotorua, Big Rock Canyons and Adventure Southland, and commercial guiding companies, such as Abel Tasman Guides.

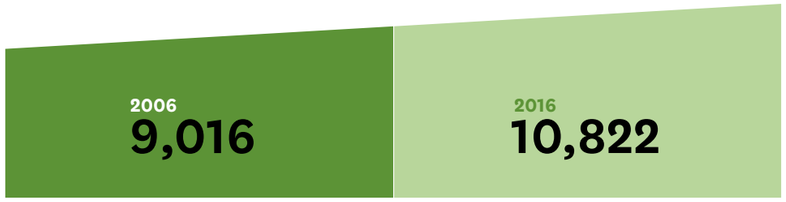
OUTDOOR LEISURE GROUPS
Non-profit clubs and groups like the NZ Alpine Club and Federated Mountain Clubs (FMCs); youth groups including Scouts and Guides; Council-run outdoor programmes and community groups.

Workforce profile

TOP FIVE JOBS BY VOLUME

TOUR GUIDE	PARK RANGER	OUTDOOR ADVENTURE GUIDE	OUTDOOR ADVENTURE INSTRUCTOR	CONSERVATION OFFICER
2,058	926	853	667	304

FILLED JOBS



Employment in the industry is expected to grow by an average of 3.7% per annum over the next five years

There were 10,822 people employed in the outdoor recreation industry in 2016, or 0.5% of the total workforce in New Zealand.

Employment growth in the outdoor recreation industry in the five years to 2016, at 1% per annum, was weaker than employment growth in the total economy (1.9% per annum).

However, in the five years to 2021, employment in the industry is expected to grow by an average of 3.7% per annum, with employment figures expected to reach 12,978 in 2021. This will require an extra 2,000 employees, not counting those who leave the industry and will need to be replaced.

Workforce makeup

TYPE OF EMPLOYMENT

Of those employed in the outdoor recreation industry in 2013, some 66.3% worked full-time hours. The number of full-time equivalent (FTE) employment numbers in the outdoor recreation industry grew by 3.9% from 2015 to 2016, bringing the total FTEs to 9,779.[61]

Over the past five years to 2016, the self-employment rate in the industry has increased by an average of 0.9% per annum, while the self-employment rate has only increased by 0.1% over the same period for the total economy. Despite this, the self-employment rate in the outdoor recreation industry and the total economy were both sitting at 18% in 2016.

A large number of outdoor professionals work as contractors, and may choose to work in the industry because it offers a flexible lifestyle.

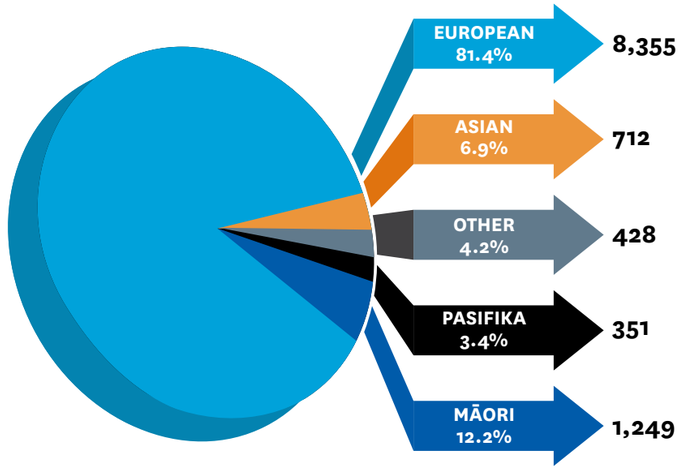
GENDER

In 2016, females accounted for 45% of employment in the industry, which is a 2% increase from 2015, but still just less than the 47% of females who are employed in the total workforce. Males represented 55% of the industry's workforce in 2016, compared to 53% of the total workforce.

ETHNICITY

In 2013, some 81% of people working in the outdoor recreation industry identified as NZ European/Pakeha, compared with 77% in the total workforce.

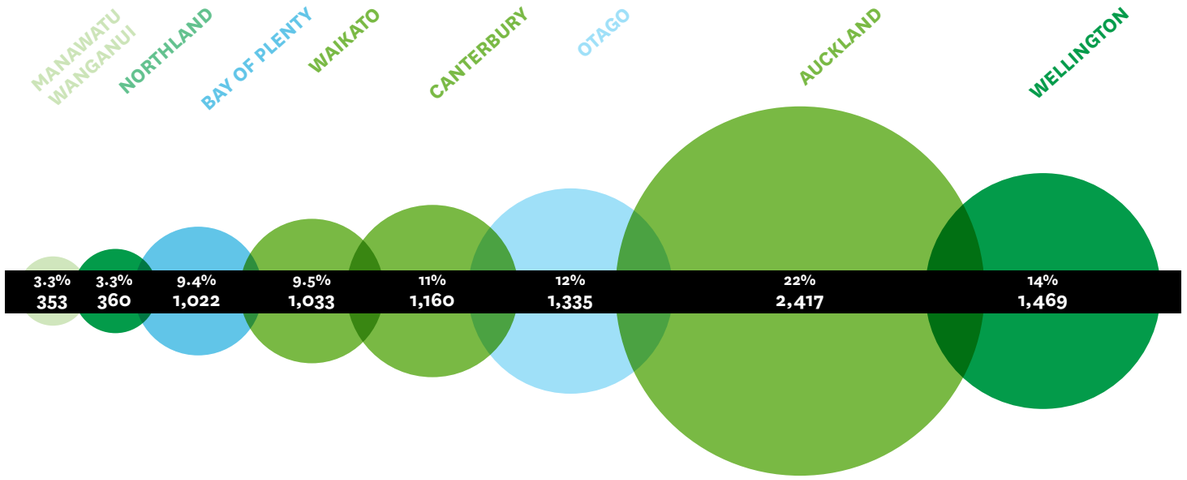
In 2013, those who identified as Māori accounted for 12.2% of the outdoor recreation workforce; this number is higher than the 11.1% of people in the total workforce who identify as Māori. Those in the industry who identify as Pasifika (3.4%) and Asian (6.9%) are under-represented compared with the total economy, where 4.9% identify as Pasifika, and 11% identify as Asian. There is a need to encourage the training of a more diverse range of ethnicities into the workforce to better reflect the demographics of outdoor recreation participants and meet the needs of a changing New Zealand population.



[61] *Full-time equivalent (FTE) employment is a way of looking at employment that takes into account the workload of people into employment. FTE employment measures the number of people in employment for 40 hours or more per week. Two people who are employed part-time are measured as one FTE. Using FTEs instead of employment to look at change over time can provide a more consistent comparison of labour resources used in employment.*

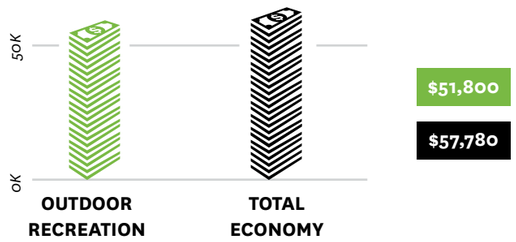
REGIONAL EMPLOYMENT

In 2016, the Auckland region employed the highest number (22%) of the 10,822 people working in the outdoor recreation industry. Considering their size, regions such as Bay of Plenty (9.4%) and Waikato (9.5%) make a high contribution to employment in the industry.



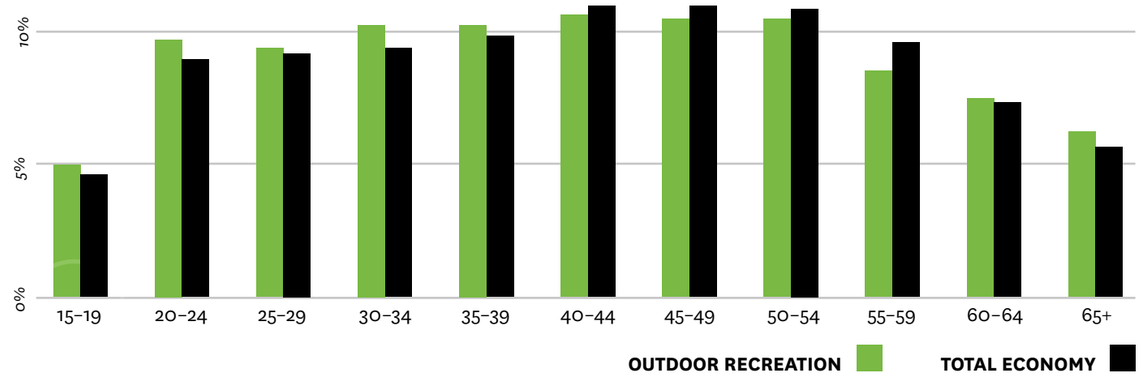
EARNINGS

The average annual earnings of outdoor recreation professionals in 2016 were $51,800, which is lower than average earnings in the total economy of $57,780. Annual average earnings in the outdoor recreation industry grew at the same rate of 3.4% as the total economy over the past decade.



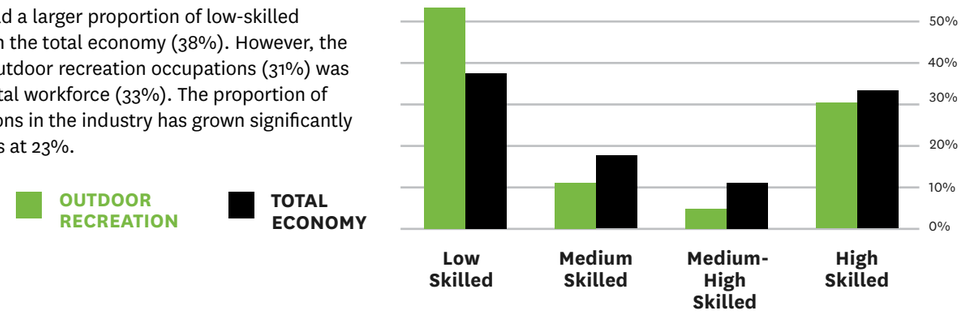
AGE

The outdoor recreation industry has a similar age profile to the total workforce. In 2013, the average age of those working in the outdoor recreation industry was 42.6 years, compared to 43 years in the total workforce.



SKILL LEVEL[62]

In 2016, the industry had a larger proportion of low-skilled occupations (53%) than the total economy (38%). However, the ratio of highly-skilled outdoor recreation occupations (31%) was similar to that of the total workforce (33%). The proportion of highly-skilled occupations in the industry has grown significantly since 2005, when it was at 23%.



[62] *Highly-skilled occupations typically require a bachelor degree or higher qualification. Medium-high-skilled occupations typically require an NZ Register Diploma, an Associate Degree or Advanced Diploma. Low-skilled occupations typically require an NZ Register Level 3 qualification or lower.*

Impact

In 2016, the outdoor recreation industry contributed $727 million to the New Zealand economy, or 0.3% of GDP. This has decreased from the industry's $732 million contribution in 2015.

Outdoor pursuits like tramping, mountain biking and kayaking are growing in popularity[63] while traditional organised sports like cricket, tennis and touch rugby are seeing a decline in participation.[64] The outdoors offers New Zealanders a free or low-cost means of staying active and experiencing nature.

Fishing, tramping, canoeing/kayaking and hunting were the most popular outdoor pursuits for New Zealanders in 2013/2014, and all saw a marked increase in participation compared to five years prior.[65]

There is a strong overlap between outdoor recreation and tourism in New Zealand. In 2014/15, outdoor and adventure activities were the second most popular reason for visiting New Zealand, and 73% of international tourists reported they had spent time walking or tramping during their trip.[66]

A 2013 survey found that for every $100 each visitor spent directly on outdoor recreation, they spent another $36.62 on travel, accommodation and other trip-related expenses.[67]

ECONOMIC CONTRIBUTION

$727M GDP

0.3% of New Zealand's GDP in 2016

Dave Thomas
Member of the Outdoor Recreation Industry Advisory Group

A key issue facing the industry, as discussed by the Outdoor Recreation Industry Advisory Group, is workforce retention, at both entry and senior level. This is, in part, due to a high proportion of seasonal workers in the industry who see the outdoor industry as a great way to holiday and see the world, but do not necessarily see it as a sustainable career.

Part of the solution we investigated was the promotion of professionalism and development of long-term career pathways for those who are working in the industry; looking at how people can progress, and perhaps mentoring key people within businesses to step into higher roles; and creating future opportunities for them.

There is a diverse range of employment opportunities in the outdoor recreation industry. We need to increase the profile of the industry, and make it more attractive as a valid career option. We can do this through encouraging awareness of how people can engage with the industry, and what opportunities are available. This can be done at an individual, community or government level.

[63] *Sport NZ ActiveNZ Survey 2013/2014* [64] *Sports clubs tackle decline in player numbers, Radio NZ, July 2017* [65] *Sport NZ ActiveNZ Survey 2013/2014*
[66] *International Visitor Survey, Ministry of Business, Innovation and Employment, 2016* [67] *New Zealand Natural Outdoors: Participation and Expenditure, Horizon Research, 2013*

Trends/Issues/Risks

POLITICAL

Covering the costs of tourism

The previous government directed an extra $100 million in funding toward tourism infrastructure, such as carparks and toilets, in outdoor recreation hotspots – many of which have been straining under record high visitor numbers.[68] Opinions differ in the industry as to whether ongoing tourism growth should be encouraged or scaled back.[69]

Compliance pressure

The industry continues to adjust to the new health and safety requirements, and adventure activity regulations.[70] Larger organisations with more resources have an advantage in transitioning to the new regime; however, those smaller operators that are proactively seeking guidance and updating their procedures and reporting are also successfully navigating the change.[71]

Foreign land ownership

Some outdoor groups are expressing concern at growth in foreign ownership of high environmental-value and heritage-value land, and the impact on recreational access.[72] In 2016, some 466,000 hectares of New Zealand land was sold to overseas investors – five times more than in the previous year.[73]

Access issues

Increased tourism means access to national parks must be balanced with the negative impacts of visitors in these areas. Treaty settlements also threaten access to outdoor spaces for personal and commercial outdoor recreation use.[74]

ECONOMIC

Talent supply outstripped by demand

Skilled outdoor recreation professionals are in short supply, and recruiting, whether locally or internationally, is a major challenge for the industry. Of those surveyed by Skills Active, 65% of organisations work with tertiary providers in a bid to recruit staff.[75] The largest barrier when recruiting staff is finding work-ready applicants with the appropriate skills and qualifications. Other barriers include people not wanting to live in remote locations, low pay, and the fact that much of the work in the industry is seasonal.[76]

Schools reducing outdoor education activities

Increased costs for outdoor education services under the new health and safety regime mean that outdoor education programmes are shrinking at already stretched schools. This in turn could reduce the pipeline of young people entering careers in outdoor recreation.

Decreased conservation funding

While tourism infrastructure funding was a major feature of the 2017 budget, this was not matched by growth in Department of Conservation funding for the construction and maintenance of key recreation assets such as walkways and bike trails.[77]

SOCIAL

Wellbeing in the outdoors

As in other areas of sport and recreation, the outdoor recreation industry is part of an ongoing conversation about creating wellbeing for New Zealanders. Outdoor recreation organisations are calling for greater recognition of the social and mental benefits of time spent in natural environments.[78]

Access to unstructured play

Local authorities are emphasising the importance of development through access to green space for children and young people, and channelling resources toward more open spaces for physical recreation.[79]

Technological

Technology plays an increasingly influential and important role in outdoor recreation and adventure. Five areas in which technology plays a significant role include: improving access and transportation in the outdoors; increasing comfort; enhancing safety; improving communication; and sharing information.

Augmented reality in nature

Efforts to get digital-age people into the outdoors has seen an increase in the use of technology in outdoor recreation. Activities such as PokemonGo and other augmented reality challenges have had a spike in popularity.[80]

[68]Budget 2017: Tourism Infrastructure Package, Ministry of Business, Innovation and Employment, May 2017 [69]Kiwis risk losing an 'unalienable right to wild places', Fairfax, December 2016 [70]Press release: Erosion of recreational opportunities requires clarification of HSW Act, New Zealand Recreation Association, July 2017 [71]Interview with Kyle Barnes, Caveworld, 2016 Annual Report, Skills Active [72]Press release: F&G Criticises Overseas Investment Office Hunter Valley Decision as 'Extraordinary', Fish and Game NZ, March 2017 [73]Govt denies 'big buy-up' of NZ land as figures show 466,000 hectares sold to foreigners in 2016, NZ Herald, March 2017 [74]Treaty land – keep out, Herald on Sunday, 2009 [75]Skills Active Workplace Survey, 2017 [76]Skills Active Workplace Survey, 2017 [77]Press release: NZRA concerned about $2M decrease in recreation spending, New Zealand Recreation Association, May 2017 [78]Advocacy Priority One: Greater Recognition of the Economic and Social Value of Recreation, New Zealand Recreation Association, www.nzrecreation.org.nz [79]Tākaro – Investing in Play Discussion Document, Auckland Council, www.shapeauckland.co.nz [80]Press release: Dinosaur Eggs and Kitten Catching a hit in Wellington Parks, New Zealand Recreation Association, August 2016

Training environment

In 2013, some 47.9% of people employed in the outdoor recreation industry had a level 4 qualification or higher, compared with 45.7% of people in the national labour force. In 2013, only 11.2% of outdoor recreation professionals had no qualifications at all, compared with 13.4% in 2006.

With a wide range of highly technical roles and industry-specific skills, and a large volunteer base, on-job training is a key component of workforce development for outdoor operators.

BARRIERS TO INDUSTRY TRAINING AND QUALIFICATION COMPLETION

For many of the small businesses and non-profit organisations in the industry, the major barrier to training and qualifying staff is cost.

Other barriers include:

- Access and availability of suitable trainers and assessors
- High turnover of staff and volunteers
- Commitment by staff and volunteers to undertake training and complete their qualifications.

The industry struggles to find qualified outdoor education teachers, guides, instructors, coaches and retail and support staff. Respondents to the Skills Active Workplace Survey listed skills shortages, isolation, seasonal and part-time work, and low pay as some of the key barriers to filling these roles.[81]

CURRENT AND FUTURE SKILL NEEDS

Outdoor recreation employers want to see more training in the following skill sets:

- Marketing and sales
- Customer service
- New technology
- Management and supervision
- Tikanga and te reo Māori.

[81]Skills Active Workplace Survey, 2017

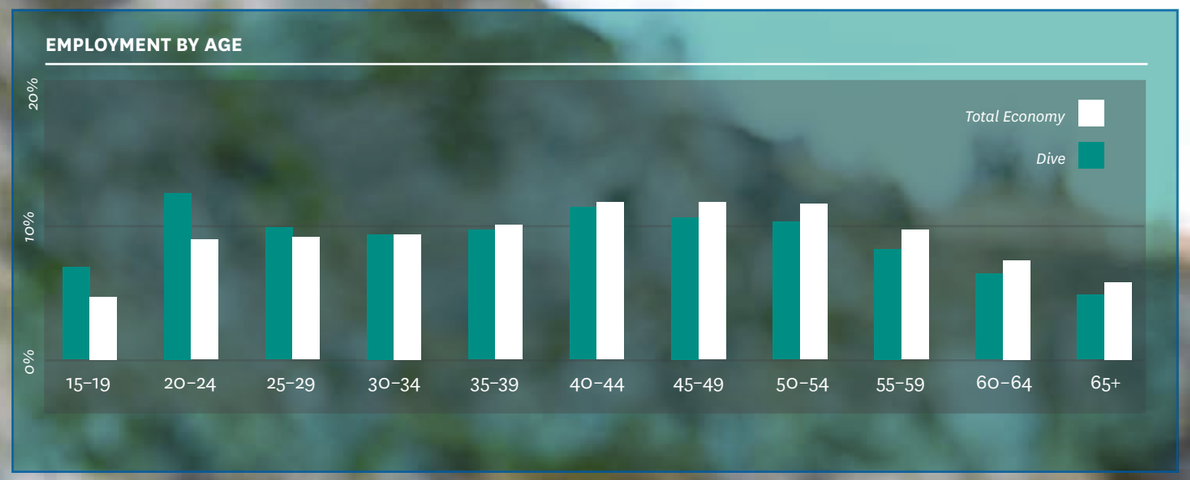
Dive

New Zealand's extensive coastline provides locals and visitors with a prime opportunity to interact with the marine environment. Diving is one way people can engage with the underwater world. While many New Zealanders enjoy diving for leisure, there are also a wide range of occupations that require a dive skill set.

Industry snapshot

While many New Zealanders enjoy diving for leisure, there are also a wide range of occupations that require a dive skill set

EMPLOYMENT BY AGE



EMPLOYMENT BY GENDER

DIVE

MALE 89%

FEMALE 11%

TOTAL ECONOMY

MALE 53%

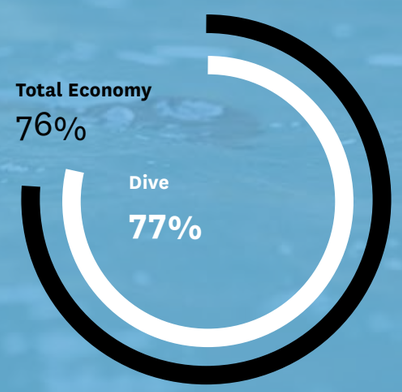
FEMALE 47%

ECONOMIC CONTRIBUTION

$30.2M GDP

0.01% of New Zealand's GDP in 2016

PERCENTAGE WORKING FULL-TIME - 2013



Percent working 40 hours or more per week

FILLED JOBS

Industry profile[82]

Effective use of the marine environment can provide many economic, ecological, social and cultural opportunities.

Professionals with a dive skill set have the expertise that enables them to productively and safely engage with the underwater environment. Divers may work underwater for a variety of reasons, including: construction work, gathering seafood and aquaculture, retrieving property from shipwrecks, search and rescue, film production and photography, police and military work, science, conservation and bio-security, safety diving, tourism, guiding or dive instructing.

There were 79 dive-specific business units in the industry in 2016. There has been no significant change over the last five years. Business unit growth over this period was lower than in the total economy (1.5% per annum).[83]

The average number of employees per business unit in the dive industry increased from 4.4 employees per business unit in 2011 to 5 employees per business unit in 2016. Over the same period, the average employees per business unit in the total economy increased from 4.2 to 4.3.

ROLES COVERED UNDER THE DIVE INDUSTRY SCAN

Diver

Swims underwater to undertake tasks such as seafood gathering, research, salvage and construction.

Specialisations:

- Abalone diver
- Clearance diver (Navy)
- Fisheries diver
- Hyperbaric welder diver
- Offshore diver
- Onshore diver
- Pearl diver
- Saturation diver
- Scientific diver.

Diving instructor (open water)

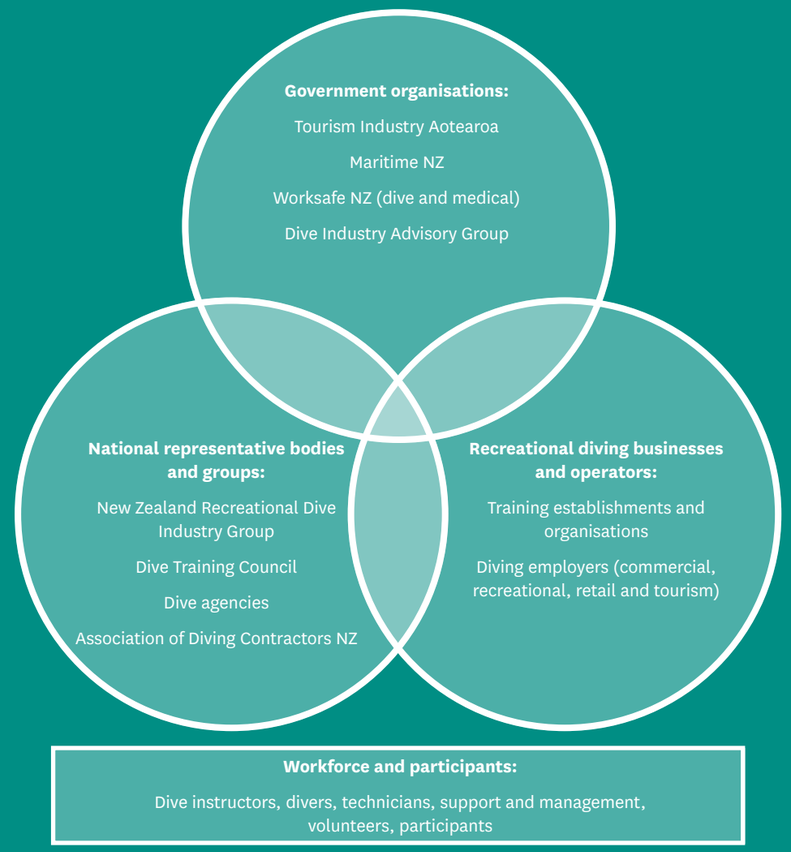
Trains and instructs recreational or commercial open water divers in diving techniques, safety and the correct use of diving equipment.

Specialisations:

- Dive master
- Scuba instructor
- Snorkelling instructor
- Surface supply breathing apparatus (SSBA) instructor.

[82] *The data in this scan only covers those who have the occupation of a diver or a dive instructor. It does not cover those in the broad range of occupations for which dive skills are important in order to productively engage in work. Caution is advised when interpreting the data in this section, given the small sample size.*
[83] *This excludes business units that may employ divers or people with dive skill sets, but do not identify as a diving business.*

Industry structure



TYPES OF DIVING ACTIVITIES

The dive industry can be broken into two distinct areas: Supporting recreational diving, and the commercial (including scientific) diving sectors. Recreational diving can be defined as diving carried out by individuals or groups for their own pleasure. This part of the industry is supported by retail, wholesale, tourism, travel, charters and tour operations.

RECREATIONAL DIVING INCLUDES PEOPLE WORKING IN:

- Dive shops – providing recreational limits training, organised trips, retail and dive organisations
- Equipment – manufacturers, wholesalers, distributors and service technicians
- Compressor operation – air filling/air purity, cylinder testing
- Recreational diver training – dive certifications, technical, instructors
- Training organisations – providing tertiary and national dive qualifications, tertiary diver training, dive-related guidelines, standards, legislation, compliance
- Dive tour and charter vessel operation – charter operations working in conservation, leisure guiding and tourism.

COMMERCIAL DIVING INCLUDES PEOPLE WORKING IN THE FOLLOWING SECTORS:

- Dive training
- Aquaculture and seafood
- Construction, industrial and salvage
- Media and film
- Military and government services
- Science, conservation, research, archaeology and bio-security.

Workforce profile

JOBS BY VOLUME

Worldwide, there are over 6,200 Professional Association of Diving Instructors (PADI) dive centres and resorts, and more than 136,000 individual PADI professionals, who have issued more than 23 million certifications around the world. In addition, Scuba Schools International (SSI) has over 2,800 international locations – including centres in New Zealand, and 13 dive centres in New Zealand provide training through international dive agency NAUI.

There were 397 divers or dive instructors employed in the dive industry in 2016, or 0.02% of the total workforce in New Zealand. This does not cover those in the broad range of occupations for which dive skills are essential for their work. The total number of people who use dive skills in their work is not known.

Employment growth in the dive industry in the five years to 2016, of 2.7% per annum, was stronger than employment growth in the total economy (1.9% per annum).

In the five years to 2021, employment in the dive industry is expected to grow by an average of 4.5% per annum, peaking at 495, compared to the predicted growth in the total economy of 2.3% per annum.

DIVER

254

DIVING INSTRUCTOR (OPEN WATER)

143

FILLED JOBS

Employment in the dive industry in the five years to 2021 is expected to grow by 4.5% per annum

TYPE OF EMPLOYMENT

People working in the dive industry, like people in the total economy, typically work 40-49 hours per week (77% and 76% respectively in 2013).

Over the five years to 2016, the number of Full Time Equivalent (FTE) employment numbers in the dive industry grew by 3.4% per annum, to 363.[84]

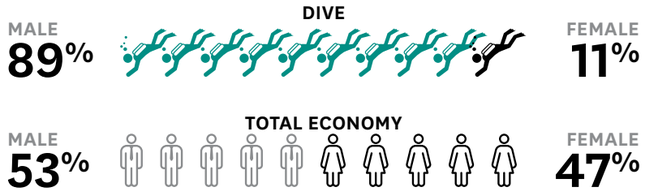
In 2016, 18.9% of the industry was self-employed. This is slightly higher than the total economy's self-employment rate of 18.0%. In the five years to 2016, the self-employment rate in the dive industry declined, while the overall total economy self-employment rate increased.

[84] *Full-time equivalent (FTE) employment is a way of looking at employment that takes into account the work-load of people into employment. FTE employment measures the number of people in employment for 40 hours or more per week. Two people who are employed part-time are measured as one FTE. Using FTEs instead of employment to look at change over time can provide a more consistent comparison of labour resources used in employment over time.*

Workforce makeup

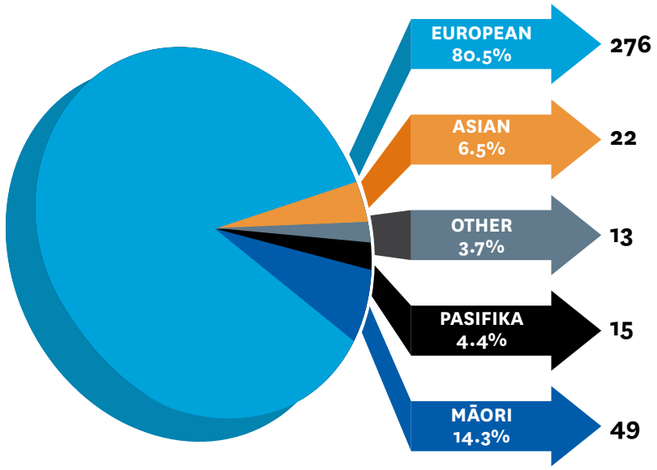
GENDER

There are significantly fewer female than male workers in the dive industry. Despite a 3.7% increase between 2001 and 2016, female workers still only accounted for 11.3% of the industry in 2016. Over the same period, the share of females in the total economy increased from 45.5% to 47.2%



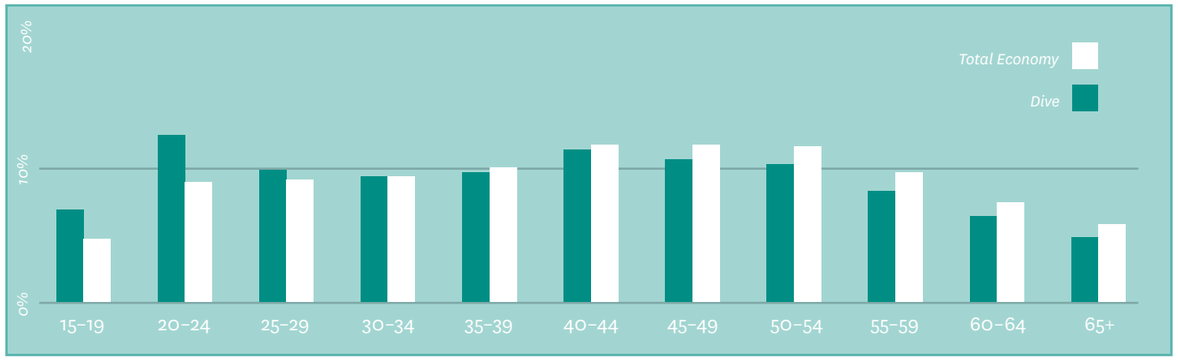
ETHNICITY

The majority (80.5%) of people in the dive industry in 2013 identified as NZ Pakeha/European. This was also the case with the total economy (77.2%). People who identified as Māori accounted for 14.3% of the dive industry in 2013, which is higher than the 11.1% of people in the total economy who identified as Māori. People who identified as Pasifika made up 4.4%; and Asian people at 6.5%.



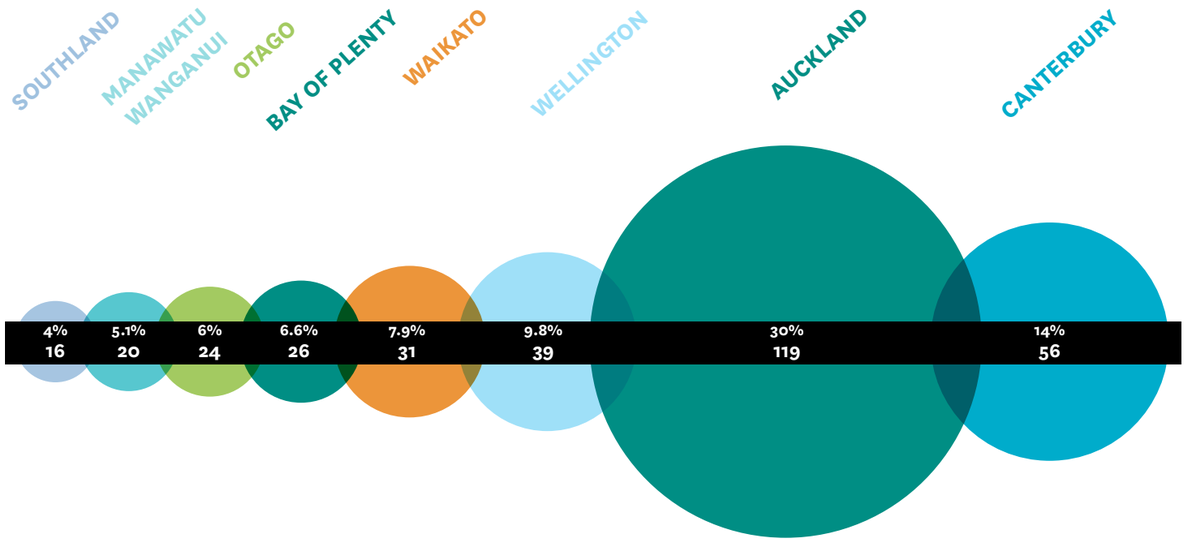
AGE

The average age of those working in the dive industry in 2013 was 40.8 years, compared with 43 years in the total workforce.



REGIONAL EMPLOYMENT

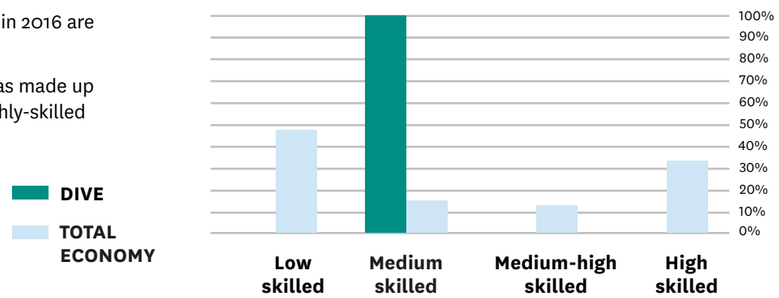
In 2016, of the 397 people employed in the dive industry, 30% were based in the Auckland region. Industry employment in Auckland grew at a faster rate than employment nationally between 2011 and 2016.



SKILL LEVEL[85]

The two dive industry occupations captured in 2016 are classified as medium skilled.

In comparison, the total economy in 2016 was made up of 38% low-skilled occupations and 33% highly-skilled occupations.



EARNINGS

Annual average earnings in the dive industry in 2016 were $53,400. This is lower than average earnings in the total economy of $57,780, but the highest average earnings of all the industries Skills Active engages with.

[85] *Highly-skilled occupations typically require a bachelor degree or higher qualification. Medium-high-skilled occupations typically require an NZ Register Diploma, an Associate Degree or Advanced Diploma. Low-skilled occupations typically require an NZ Register Level 3 qualification or lower.*

Impact

Marine and aquatic activities are a vital component of Kiwi culture, and many people participate in diving recreationally. These activities have a number of positive benefits, including improved health and wellbeing, educational opportunities, and economic benefits for a local community through increased local and international tourism.

The dive industry contributed $30 million to New Zealand's GDP in 2016. In the five years to 2016, GDP in the dive industry increased by 1.6% per annum, compared with growth of 2.5% per annum in the total economy.

The nation's marine tourism industry is growing, and draws visitors from all over the world. Over the five years to December 2016, the number of international tourists who reported they had spent time diving or snorkelling increased from 0.7% in 2012 to 3% in 2016.[86]

There are many marine tourism operators, instructors and guides in New Zealand. National data relating to the direct contribution of the industry to tourism is unavailable. However, if serving as indication, Northland based Dive! Tutukaka estimates that the direct value of their tourism attraction to the local community exceeds $50 million.[87]

Dive eco-tourism opportunities in New Zealand include: explaining flora and fauna, reefs, marine reserves, seeing marine animals (whales, seals and dolphins), sighting rare organisms (black coral) and diving on sunken ships and wrecks.

The International Visitor Experience Monitor 2015 shows that New Zealand's natural environment is a key reason to visit for international visitors. Some 72% rate New Zealand's environmental management among the best (24%) or ahead of most countries (48%) in the world.[88]

ECONOMIC CONTRIBUTION

$30.2M GDP

0.01% of New Zealand's GDP in 2016

Jen Clent
PADI Pros Oceania Regional Manager

Diving gives people something unique. It can open up a new world. People might have challenges going on in their everyday life, but when they go underwater they disappear as they are in this amazing environment.

Our blue planet is covered in about 70% water, yet so many people haven't seen it. The more people we can introduce to the ocean, the more people will see how incredible it is, and will want to protect it.

PADI has seen years of consecutive growth in divers becoming certified, which means there is an increased requirement for professionals to work in the industry.

We need to change the perception that there are not careers in diving. It is a massively growing industry, and there are a whole lot of amazing careers out there for people who want them.

Because it is such a transferable skill set, you can work in any area in the world where there is a body of water, and can have a really substantial career here in New Zealand.

[86] *International Visitor Survey, Ministry of Business, Innovation and Employment, 2016*
[87] *Marine Tourism, Fisheries and Community: Creating Barometers of Economic Change, New Zealand Tourism Research Institute, 2009*
[88] *Visitor Experience, Tourism New Zealand, 2017*

Trends/Issues/Risks

POLITICAL

Political responses to environmental concerns

There has been increased pressure for the government to address environmental policies that have a direct and indirect impact on the marine and aquatic landscape and marine tourism. Issues such as pollutants, introducing levies to address the impact of waste disposal, and international tourism impacting the environment have the potential to direct resources into the industry.

Establishing marine protected areas

Over the last decade, New Zealand has established 11 new marine reserves, and successfully negotiated with the United States to create the largest marine protected area in the world, in the Ross Sea. Establishing more marine protected areas may help attract both international and domestic visitors.[89]

Compliance pressure

The industry continues to adjust to the new health and safety requirements and adventure activity regulations.[90] Larger organisations with more resources have an advantage in transitioning to the new regime. However, those smaller operators that are proactively seeking guidance and updating their procedures and reporting, are also navigating the change effectively – with the cost and resource required for auditing and certification placing pressure on some. The updated requirements highlight the need for relevant education and qualifications surrounding health and safety.

ECONOMIC

Increased tourism investment

The previous government announced in 2017 that it is directing an extra $100 million in funding to tourism infrastructure, such as carparks and toilets, in outdoor recreation hotspots.

Marine tourism is seen as an opportunity to support the tourism industry's 2025 goal of growing total annual tourism revenue from $11.8 billion to $41 billion over the next decade.[91]

SOCIAL

Cultural development

There is potential for many more Māori to be involved in diver education and employment. Participating in the outdoor and marine environment in a cultural context develops awareness of tikanga for the coastline, the sea, river and lakes and related kawa of specific iwi and hapū within their rohe. Māori learn dive skills to gather kai moana safely. Opportunities exist for 'ruku moana' skills to be used in Māori economic activities such as cultural and adventure tourism, aquaculture and marine tourism.

Negative impacts of marine recreation

In addition to the positive social, economic and health benefits of the dive industry, there has been an increased focus on the damaging effects of marine recreation, including disturbing wildlife, damaging marine plants and animals, over-harvesting resources, and pollution. The anchoring of dive boats can inflict damage on the seabed ecology. This has continued the push for sustainable practices in the industry to minimise impacts. Diver training in New Zealand does include education on environmental care; the dive industry contributes to minimising the impact by helping with clean-ups, invasive marine species removal, and bio-security surveys and checks.

Perceptions on protecting marine environments

Research on New Zealander's attitudes towards their oceans and marine reserves shows that 7 out of 10 New Zealanders think their marine environment is under threat. Furthermore, 96% of New Zealanders would like a much higher percentage of their marine environment protected than what currently is.[92]

TECHNOLOGICAL

Use of technology

Technology plays an increasingly influential and important role in the dive industry. It has had a broad impact across the following areas: access and transportation, comfort, safety, and communication. New technology, combined with skilled divers, opens up access to previously unexplored areas. In some instances, advanced technology is replacing the need for human dive skills. An example of this are the artificially-intelligent diver robots that can explore the depths of the ocean that are too dangerous for humans to attempt.[93]

[89]Opportunity for marine tourism to benefit NZ, Tourism Industry Association, 2016 [90]Workplace Survey, Skills Active, 2017 [91]Opportunity for marine tourism to benefit NZ, Tourism Industry Association, 2016 [92]New Zealanders' attitudes towards their oceans and marine reserves, Colmar Brunton research commissioned by WWF-New Zealand, 2011 [93]Humanoid diving robot hunts for sunken treasure in French shipwreck, The Guardian, 2016

Training environment

Of the people employed in the dive industry in 2013, some 16.3% had no qualifications, compared with 13.6% of the total economy. This is down from 2006 when 20.1% of the industry had no qualifications (compared to 17.8% of the total economy).

With a wide range of highly technical roles and industry-specific skills, and a large seasonal workforce base, on-job training is a key component of workforce development for dive operators. Some operators engage with tertiary providers for training. A number of operators are training providers, and work with schools to provide skills and experience.[94]

BARRIERS TO INDUSTRY TRAINING AND QUALIFICATION COMPLETION[95]

Barriers to training and completing qualifications are mainly linked to:

- The financial cost of training
- High turnover of staff
- Lack of visibility on the return on investment of training
- Workplace capability and resources to deliver training.

Skilled divers are in short supply and recruiting, whether locally or internationally, is a challenge for the industry. Of those organisations surveyed by Skills Active, 80% stated they worked with tertiary providers and schools in a bid to recruit staff.[96] The largest barrier when recruiting staff is finding work-ready applicants with the appropriate skills and qualifications. Other barriers include people not wanting to live in remote locations, low pay, and the fact that much of the work in the industry is seasonal. The number of international workers in the industry has dropped significantly. There is also a disproportionate under-representation of women in the industry.[97]

CURRENT AND FUTURE SKILL NEEDS[98]

The industry has identified the following current and future skill needs:

- Technical instructing skills
- Technical servicing skills
- Customer service.

The industry identified the work-readiness of potential employees as a barrier in recruitment, which could be better addressed in pre- or post-employment training.

[94]Workplace Survey, Skills Active, 2017 [95]Workplace Survey, Skills Active, 2017 [96]Workplace Survey, Skills Active, 2017 [97]Workplace Survey, Skills Active, 2017 [98]Workplace Survey, Skills Active, 2017

Snowsport

The snowsport industry offers skiing, snowboarding, cross-country skiing, alpine walking and trekking, and other on-piste activities. With advances in alpine equipment and snowmaking technology, winter seasons are extending, and more people are gaining access to snow-based recreation. Mountain professionals enjoy dynamic, challenging work in stunning physical environments.

Industry snapshot

Even with improved snowmaking technology, the full winter season at the main fields lasts a maximum of 16 weeks

Note: Due to the seasonal nature of the snowsport sector, Infometrics data is not suitable for use, as it relies on census data captured in March, when no ski fields are operating. Instead, Skills Active collects the quantitative data in this section directly from the New Zealand snowsport industry through annual surveys.

Industry profile

New Zealand's three main alpine operators are commercial businesses, employing some 85% of the workers in the industry. The remainder of the industry comprises smaller commercial and club fields, and import, wholesale, retail and rental businesses.

The success of each season is dictated by snowfall, and even with improved snowmaking technology, the full winter season at the main fields lasts a maximum of 16 weeks. The industry is growing its summer operations each year, including mountain biking, luging, walking tracks, star gazing and cultural tours. The long-term goal is to extend the use of facilities to 30 weeks per year.

National organisations

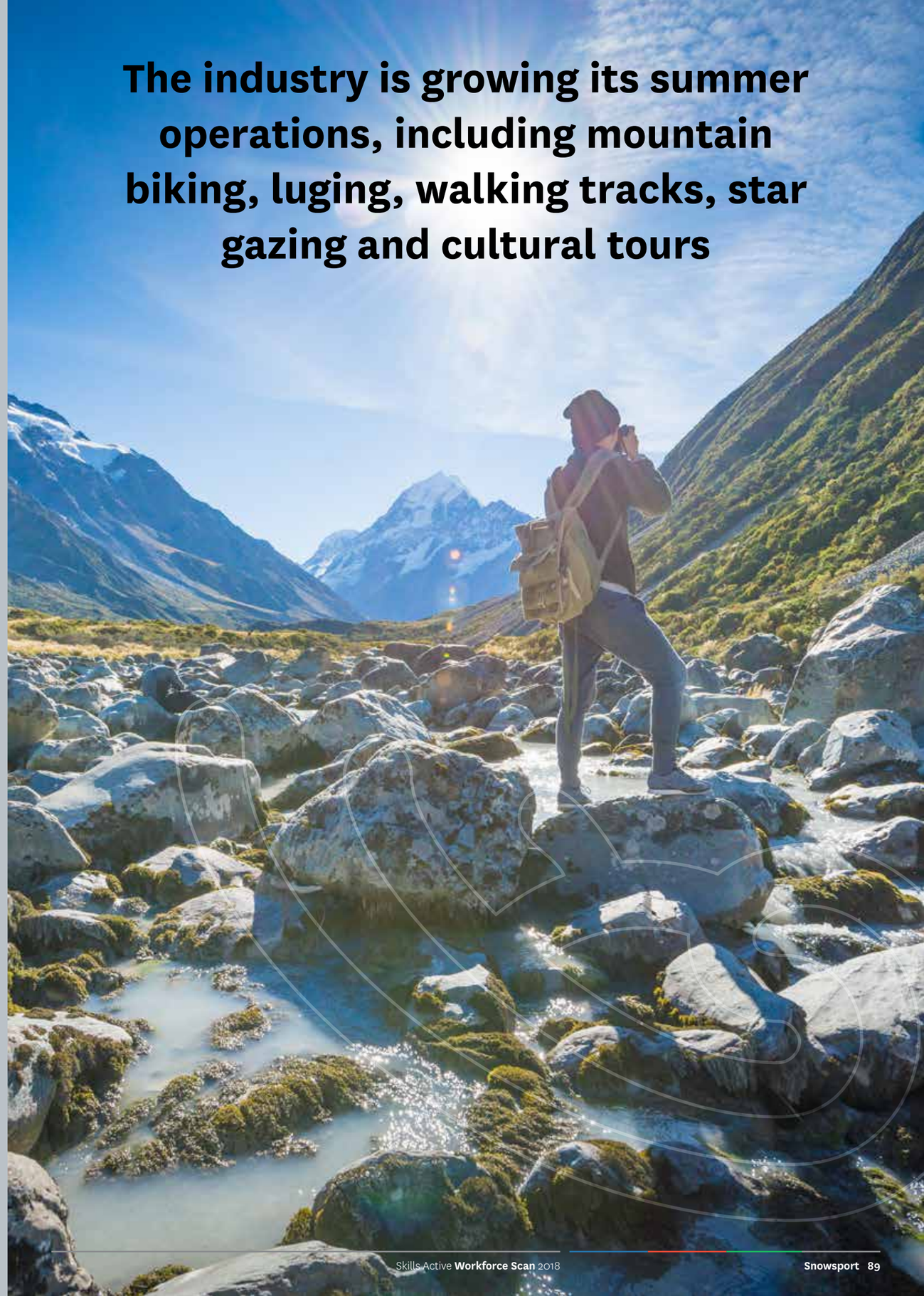
NZ Snowsport Council
Ski Areas Association New Zealand
NZ Snow Industries Federation
NZ Snowsports Instructors' Alliance

NON-RESORT COMMERCIAL OPERATORS
Snowsport areas
Rental shops
Retailers
Importers

PAID AND UNPAID WORKERS
Instructors
Trail Safety
Patrol
Rentals
Ticketing
Grooming
Maintenance

CLUB FIELDS

Participants



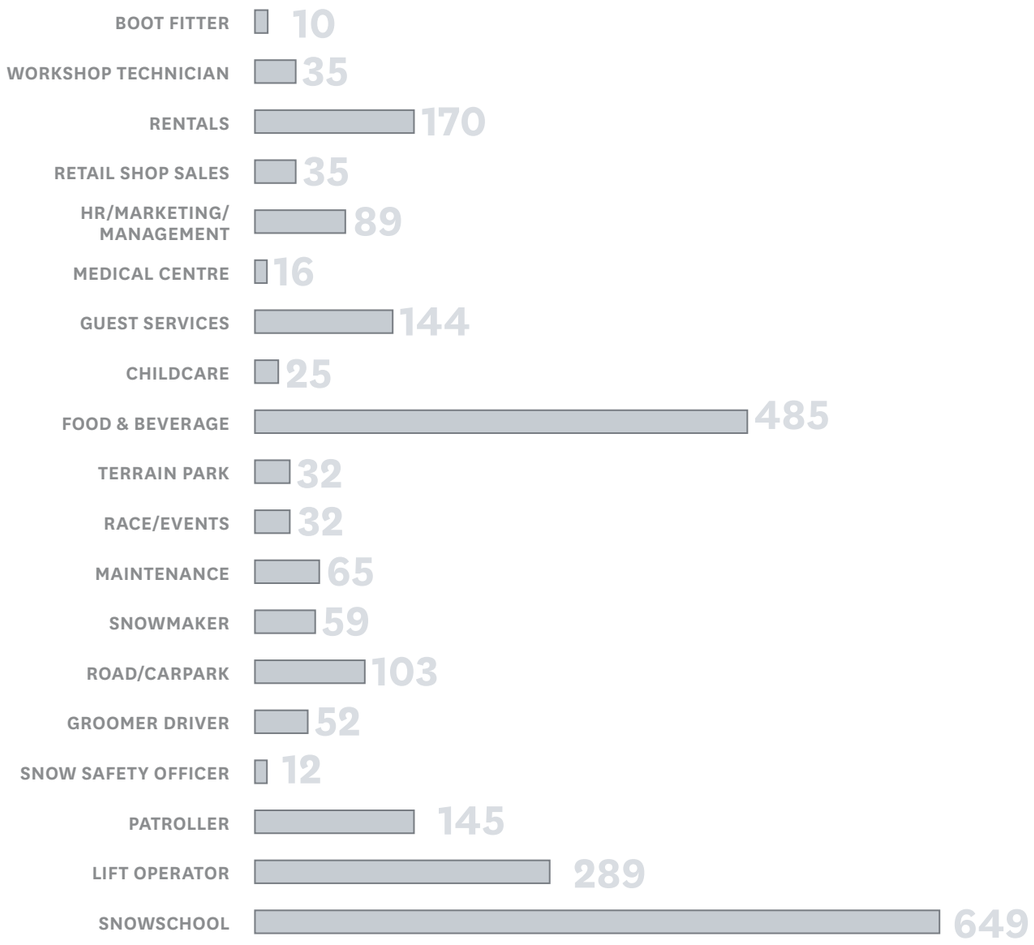
The industry is growing its summer operations, including mountain biking, luging, walking tracks, star gazing and cultural tours

Workforce profile

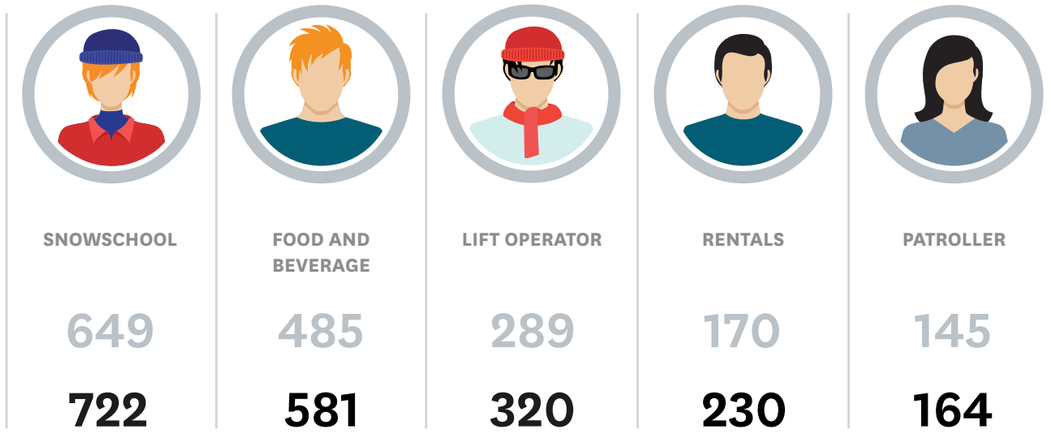
In 2017, there were almost 3,000 people employed in the snowsport industry. The majority of people work full time throughout the winter season, and work in non-snowsport jobs during the off-season, or work on overseas ski fields during the northern winter. The industry estimated that an average of 35% of staff return from one season to the next.

EMPLOYMENT BY ROLE AT SNOWSPORT AREAS SURVEYED

Technical roles such as bootfitters, groomers and technicians were the hardest positions to fill in 2017. The seasonal nature of work in this industry means it can be difficult to attract and retain staff with specialist skills and relevant experience.



TOP FIVE JOBS BY VOLUME[99]



Looking five years ahead, the industry predicts an increase in the number of staff that will be required in these particular roles.[101]

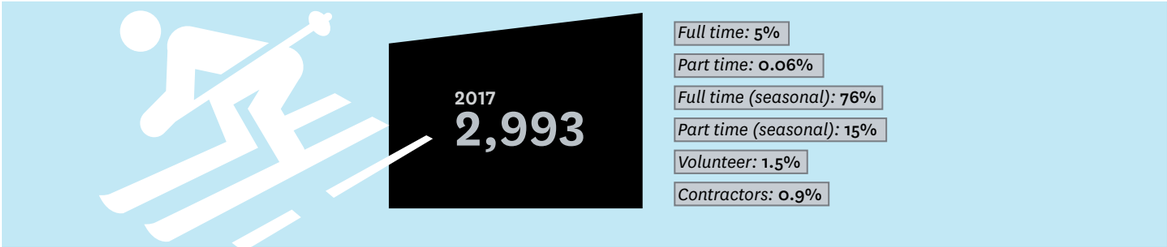
[99] *Workplace Survey, Skills Active 2017* [100] *Workplace Survey, Skills Active 2017* [101] *Workplace Survey, Skills Active 2017*

Workforce makeup

TYPE OF EMPLOYMENT

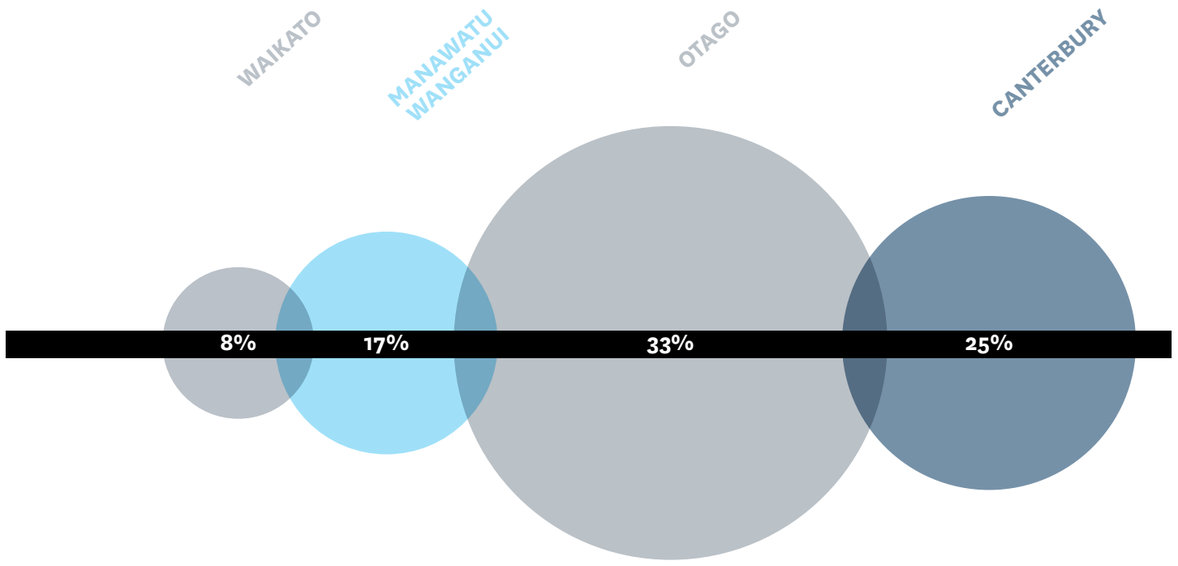
The seasonal nature of the snowsport industry means that approximately only 6% of staff work full time year-round. In 2017, some 90% of staff were employed just for the season.

The remainder of the workforce in 2017 was made up of volunteers, contractors and year-round part-time staff.



REGIONAL EMPLOYMENT

Approximately 60% of the 3,000 people working in the snowsport industry in 2017 were based in the Otago and Canterbury regions, with the remainder in the central North Island. Those working in rental, retail and importers of ski equipment are scattered throughout the country.



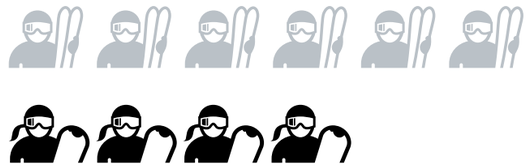
EARNINGS

Most seasonal employees are paid an hourly rate, which sits at an average of $17.00 per hour, but varies depending on place of employment and job role.

Due to the seasonal nature of the industry, less than 10% of staff work full time, year-round

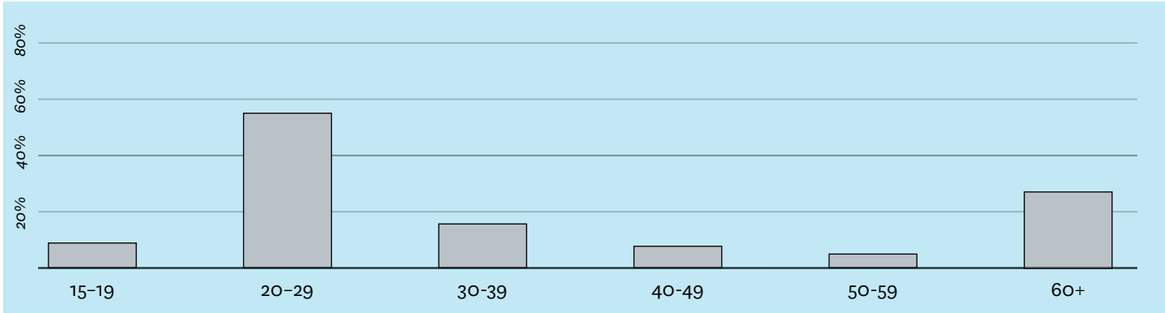
GENDER

The gender split in the snowsport industry in 2017 was approximately 60% male and 40% female.



AGE

The industry has a young age profile, with those under the age of 29 years making up 55% of the industry in 2017. People over the age of 50 years also made up approximately 32% of the workforce in 2017.

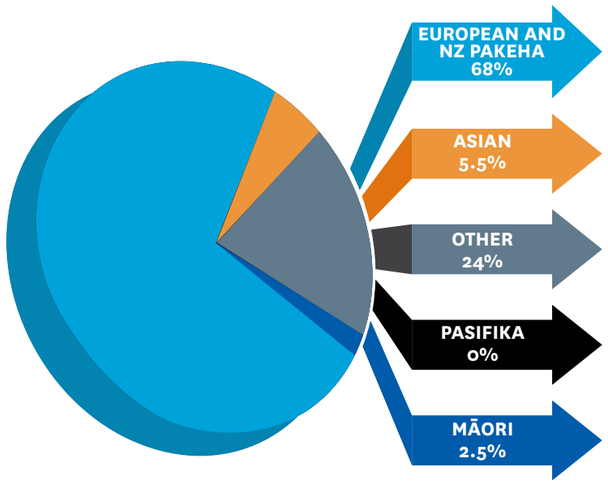


ETHNICITY

In 2017, the industry reported that, on average, some 68% of staff identified as New Zealand Pakeha or European. The survey did not differentiate between the two, so the total percentage represents people from Europe, and those who identify as New Zealand Pakeha.

Those who identify as Māori made up 2.5% of the workforce in 2017; Pasifika people 0%; and Asian people 5.5%. Those who identified with another ethnicity made up 24% of the workforce.

The industry identified issues surrounding the ability to attract long-term Kiwi staff, due to seasonality. Many people come from overseas to work in the industry for the New Zealand winter. This is reflected in the high percentage of those represented in the European and 'other' category.



Impact

International tourists who come to New Zealand to ski and snowboard typically also take part in other tourism activities as part of their visit, including bungy jumping, boat cruises, abseiling and cultural experiences.[102]

The Queenstown Lakes district, home to three of the country's biggest ski fields, saw about $2 billion in international visitor spending in the year to June 2017, and another $1 billion in domestic visitor spending. The Ruapehu area saw about $1 billion in spending from international and domestic tourists.[103]

New Zealand has consistently recorded more than one million skier visits per annum since the early 2000s. In 2016, the country's alpine resorts saw a total of 1.427 million overseas skier visits, up from 1.397 million the year before.[104] According to the same research, there were approximately 306,000 domestic ski tourists during that period, who averaged three mountain visits each.[105]

Australians make up the biggest subset of international visitors to New Zealand alpine resorts, followed by Britons.[106] In 2012, Australians accounted for 28% (364,000 visits) of the total 1.3 million visits to our ski areas.[107] The NZ Ski group of resorts alone (Coronet Peak, the Remarkables and Mt Hutt) are reported to attract over 500,000 visitors a year.[108]

Some 6.9% of New Zealand men and 5.5% of New Zealand women reported skiing or snowboarding in the past 12 months, according to a 2013/14 survey.[109]

Trends/Issues/Risks

POLITICAL

Immigration and shortages of qualified staff

Trained and experienced ski resort staff, particularly domestic candidates, are in short supply. Snowsport employers are facing hurdles to bring in overseas recruits, and visa processing times can delay start times.[110] This may increase with the new immigration policy.

Public expectations around the management of precious resources

Commercial fields are increasingly required to demonstrate their commitment to sustainable use of New Zealand's prized alpine landscape.[111, 112]

ECONOMIC

Budgeting for infrastructure renewal

The 2017 season has seen new gondolas, chairlifts, snowmaking resources and additional transport services to get more customers up the mountain. Operators are under constant pressure to attract more visitors over longer periods, through growing and enhancing their services.[113, 114, 115]

Iwi settlements

Treaty of Waitangi settlements continue to be finalised, including in regions with alpine resources. The $25 million Tuwharetoa settlement in 2017 will mean changes to Department of Conservation operations on Mt Ruapehu.[116, 117]

Cost of living

The combination of ski fields being based in high-cost living areas, and a comparatively low-wage industry, means it can be difficult to attract and retain skilled staff.[118]

SOCIAL

Seasonal visitor surges

As crowds flock to the mountains, they can put acute pressure on resources. Operators and local authorities have to balance the services offered to tourists, such as free 'park-and-ride', with the needs of locals who expect to continue to be able to access local infrastructure.[119]

TECHNOLOGICAL

Snowmaking gains

Commercial ski areas are looking to advances in snowmaking to help counteract the season-shortening effects of climate change. Both Whakapapa and Coronet Peak opened earlier in 2017, thanks to new snowmaking equipment.[120, 121]

Social media on the mountain

Ski resorts are at the forefront of social media marketing, using a range of channels and methods to appeal to snow fans with photos, videos, competitions, live streams and more.

[102]Special interest sector statistics, Tourism New Zealand, www.tourismnewzealand.com [103]Key Tourism Statistics, Ministry of Business, Innovation and Employment, 2017 [104]2017 International Report on Snow & Mountain Tourism, Vanat, April 2017 [105]2017 International Report on Snow & Mountain Tourism, Vanat, April 2017 [106]Tourism 2025, Growing Value Together, Tourism Industry Aotearoa, 2014 [107]Tourism 2025, Growing Value Together, Tourism Industry Aotearoa, 2014 [108]Interview with NZ Ski CEO Paul Anderson, Acuity Magazine, December 2016 [109]Active NZ Survey, Sport NZ, 2013/14 [110]Workplace Survey, Skills Active, 2017 [111]Sustainable Slopes, NZ Ski, www.nzski.com [112]Ruapehu Green, Ruapehu Alpine Lifts, www.mtruapehu.com [113]Chairlift opened on Mount Ruapehu, Wanganui Chronicle, May 2017 [114]Press release: We're getting a Chondola, Cardrona, www.cardrona.com [115]Mt Ruapehu business fights against cooling times, NZ Herald, December 2016 [116]Māori and DOC to work closer in Ruapehu, Fairfax, July 2017 [117]Ngāti Tūwharetoa sign treaty settlement with Crown, Radio NZ, July 2017 [118]Workplace Survey, Skills Active, 2017 [119]Chaos in Ohakune as visitors surge to the snow on Mt Ruapehu, Wanganui Chronicle, July 2017 [120]Press release: Ruapehu Alpine Lifts Ltd set to relaunch Happy Valley, Ruapehu Alpine Lifts, www.mtruapehu.com [121]Snow-making improvements for Wanaka's Treble Cone ski area, Fairfax, March 2017

Training environment

The seasonal nature of employment means that all training must be designed to be completed within the 16-week season, while still being relevant to specific job roles. For this reason, much of the training that takes place in the industry is technical in nature and is delivered on-job.

BARRIERS TO INDUSTRY TRAINING AND QUALIFICATION COMPLETION[122]

Many barriers relate to the fact that the majority of the industry's employment is seasonal:

- Due to staff working only 16 weeks per year, they may not see the value of investing time into training for qualifications
- High staff turnover, with an average return rate of 35% from one season to the next, means it can be costly for employers to retrain the workforce each year
- Access to, and availability of relevant training.

CURRENT AND FUTURE SKILL NEEDS

The industry has identified the following current and future skill gaps:[123]

- Technical skills, like boot fitting and grooming
- Skills to carry out technical and electrical work
- Training in new technology
- Tikanga and te reo Māori.

Trevor Brunton
Head of Lift, Retail and Rental Departments at Mt Hutt Ski Area

One of the main issues for the workforce is the high staff turnover. We lose a lot of the staff because of the seasonality of the work.

In some departments, close to 70% of our staff are on working holiday visas. It is difficult for us to keep those international workers, as it can be difficult for them to come back and get a second visa.

It is really difficult to attract locals to work in the industry, because the work is seasonal and the wages are low.

Visa issues also make it difficult for the locals to get to the rest of the world and continue doing seasonal work backwards and forwards, chasing winters and keeping up with their passion, because the rest of the world is building walls like we are.

Skills Active supports NZSki by providing tailored qualifications that align to the NZQA framework. It ensures that the training for our staff is consistent and compliant, and it enables our staff to leave after a season with a qualification they can take forward to a new employer.

[122]Workplace Survey, Skills Active, 2017 [123]Workplace Survey, Skills Active, 2017

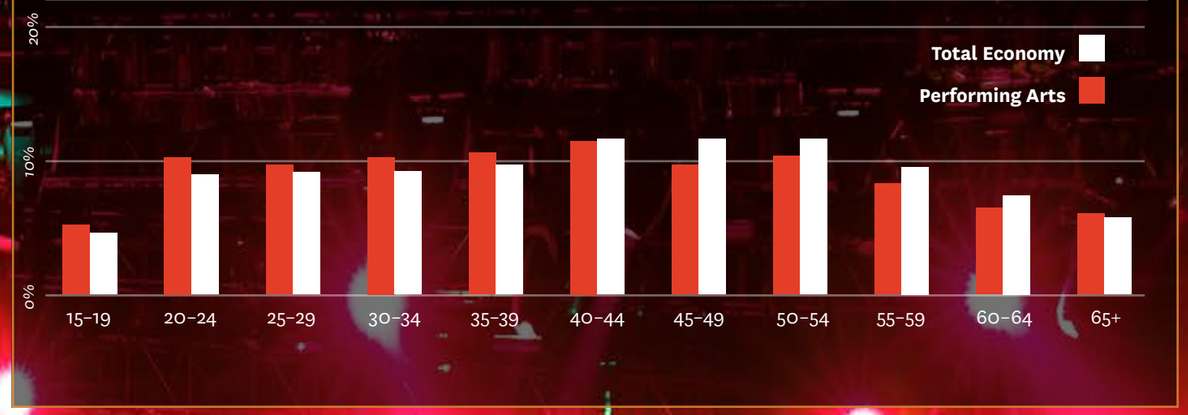
Performing Arts

The performing arts industry enriches and energises the cultural and social life of New Zealanders. Professionals in the performing arts space are producing, creating and educating through a wide range of dynamic and complex mediums. As an active form of recreation, performing arts is a natural fit with Skills Active, and in April 2017 it was added to the organisation's gazetted scope.

Industry snapshot

Professionals in the performing arts space are producing, creating and educating through a wide range of dynamic and complex mediums

AGE



EMPLOYMENT BY GENDER

Performing Arts

Male 50% *Female 50%*

Total Economy

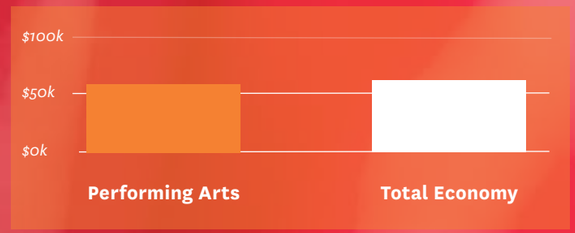
Male 53% *Female 47%*

ECONOMIC CONTRIBUTION

$2.058B GDP

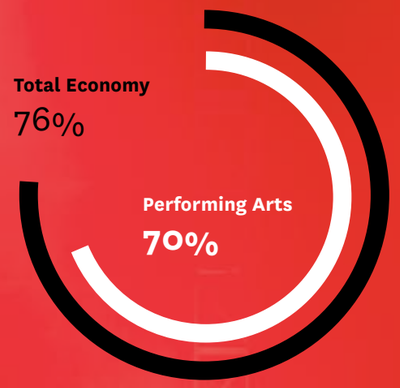
0.9% of New Zealand's GDP in 2016

AVERAGE EARNINGS



2016

PERCENTAGE WORKING FULL-TIME - 2013



Percent working 40 hours or more per week

Industry profile

The workforce includes a high proportion of freelancers, contractors and volunteers. In a report commissioned by the Ministry for Culture and Heritage, 6% of organisations surveyed were entirely staffed by volunteers. Between 65% and 80% of organisations in the industry employ freelancers or contractors.[124]

In 2016, there were 9,227 business units operating in the performing arts industry, up from 8,111 five years earlier. Growth in the industry's business units over the five years to 2016 has been greater than growth in business units in the total economy.

Performing arts businesses employed an average of three people in 2016, fewer than the average of 4.3 people employed per business unit in the total economy.

Employment growth in the performing arts industry in the five years to 2016 was at an average of 2.3% per annum – growth is predicted to continue at a slightly higher rate

THE INDUSTRY HAS THREE DISTINCT GROUPS

NATIONAL ORGANISATIONS:

There are numerous stakeholders in the performing arts industry. National organisations include the Ministry for Culture and Heritage, and Creative New Zealand. Many performing arts and cultural organisations service the industry, as well as specialist bodies such as Dance New Zealand, Entertainment Venues Association of New Zealand, and Entertainment Technology New Zealand.

LOCAL AUTHORITIES:

Local authorities are the major owners and managers of residential and event spaces and studios in New Zealand, many of which service both sport and recreation and the arts.

EMPLOYERS AND PROVIDERS:

These include production companies, technical service companies, production houses, temporary event and theatre spaces, recording studios, event venues, music industry organisations and private teachers of performing arts, such as dance, drama and music.

[124] *Skills and training needs in the cultural industry, AC Nielsen, 2008*

Workforce profile

TOP FIVE JOBS BY VOLUME

CONFERENCE AND EVENT ORGANISER

3,852

MUSIC TEACHER (PRIVATE TUITION)

3,284

PAINTER (VISUAL ARTS)

2,817

PHOTOGRAPHER

2,770

FACILITIES MANAGER

2,198

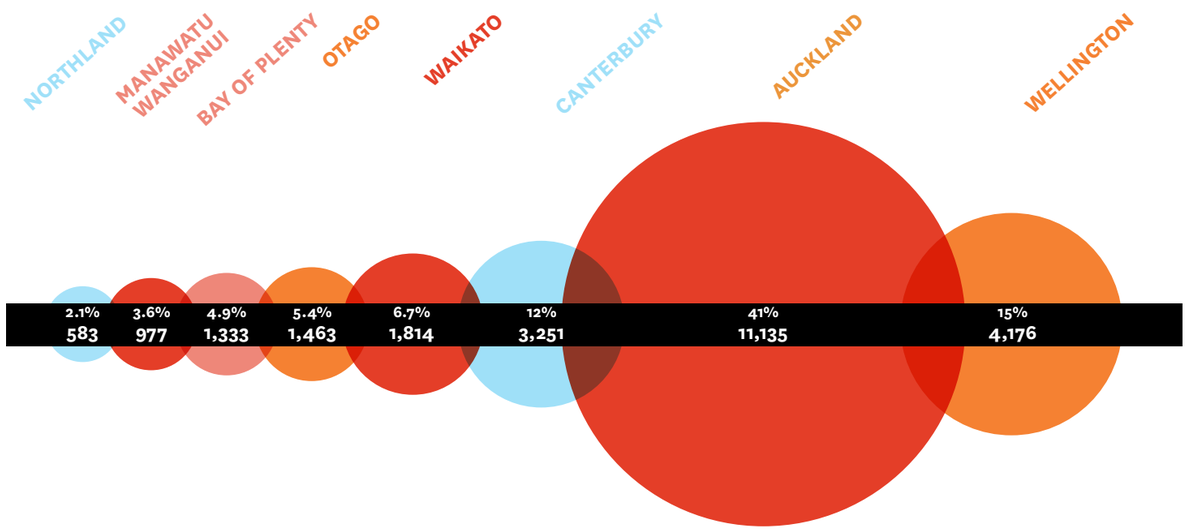
In 2016, there were 27,255 people employed in the performing arts industry, which equates to 1.2% of the New Zealand workforce.

Employment growth in the performing arts industry in the five years to 2016, of 2.3% per annum, was stronger than employment growth in the total economy (1.9% per annum).

In the five years to 2021, employment in the performing arts industry is expected to grow by an average of 2.7% per annum compared to growth in the total economy of 2.3% per annum. Over this period, employment in the industry is expected to reach 31,178 in 2021.

REGIONAL EMPLOYMENT

Some 11,135 – or 41% of all working performing arts professionals were based in the Auckland region in 2016. Performing arts jobs in Auckland grew at a faster rate than employment nationally between 2011 and 2016.



Employment is expected to reach 31,178 in 2021

Workforce makeup

TYPE OF EMPLOYMENT

Many performing arts professionals are in part-time, casual contract, project or portfolio employment, including periods of self-employment.

In 2016, 32.7% of performing arts professionals were self-employed. This is much higher than the total economy's self-employment rate of 18.0%. Over the past five years, the self-employment rate in the performing arts industry has increased, while the total economy self-employment rate has decreased.

Some 30% of people in the industry work a total of fewer than 40 hours a week, compared with 24% of people in the total economy.

These figures reflect the high number of volunteers, and part-time and casual employment in the performing arts workforce.

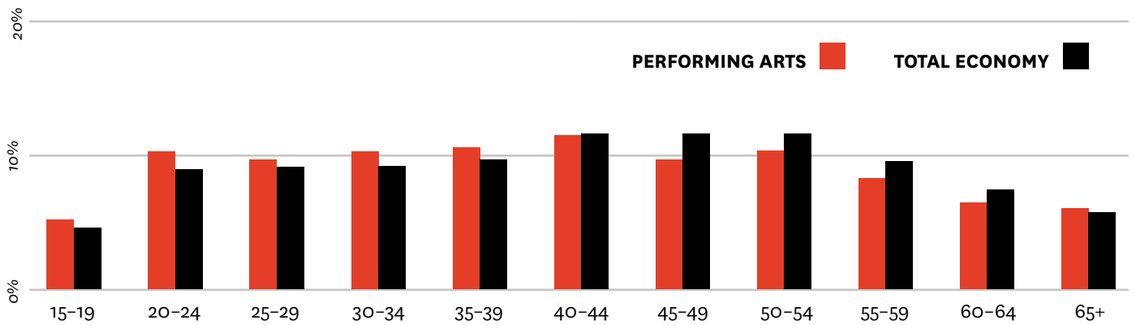
Many performing arts professionals are in part-time, casual contract, project or portfolio employment, including periods of self-employment

GENDER

The performing arts industry has good gender balance. In 2016, 49.9% of those employed in the industry were male, and 50.1% female. The percentage of females increased from 48.9% to 50.1% between 2001 and 2016. Over the same period, the percentage of females in the total economy increased from 45.5% to 47.2%.

AGE

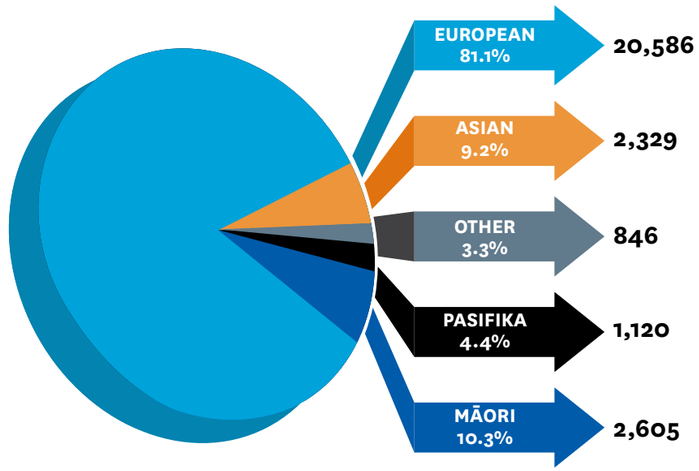
Performing arts has the most even spread of age demographics of any industry that Skills Active works with. In 2013, the average age of people in the performing arts industry was 42 years compared to 43 years in the total economy.



ETHNICITY

In 2013, there were more people working in performing arts who identified as NZ European/Pakeha than in the total workforce – 81.1% compared with 77.2%.

People identifying as Māori in the performing arts industry in 2013 accounted for 10.3% - which is lower than the 11.1% of people who identify as Māori in the total economy. Pasifika people make up 4.4%, and Asian people at 9.2%.



SKILL LEVEL[125]

Many people enter performing arts with post-school qualifications, while others achieve direct entry as a result of individual talent. Some 31.5% of people working in the industry have a bachelor's degree or higher. However, these qualifications are not necessarily directly related to performing arts.

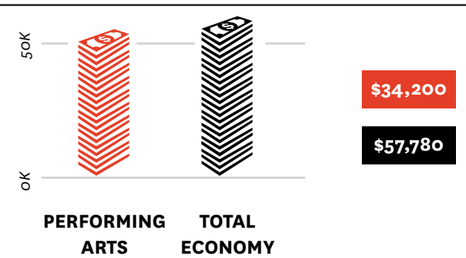
In 2016, the performing arts industry had a much smaller proportion of low-skilled occupations (7.9%) than the total economy (38%), and had a larger proportion of highly-skilled occupations (62%) than the total economy (33%).

In 2013, some 8.8% of people in the performing arts industry had no qualification (11.6% in 2006). This was lower than the total economy (13.6% in 2013 and 17.8 in 2006).

EARNINGS

Annual average earnings for a professional in the performing arts industry in 2016 was $53,100, which is lower than average earnings in the total economy of $57, 780.

Annual average earnings in the performing arts industry grew at a slower rate than the total economy over the past decade – 2.9% growth per annum, compared with 3.4% for the total economy.



[125] *Highly-skilled occupations typically require a bachelor degree or higher qualification. Medium-high-skilled occupations typically require an NZ Register Diploma, an Associate Degree or Advanced Diploma. Low-skilled occupations typically require an NZ Register Level 3 qualification or lower.*

Impact

In 2016, the performing arts industry contributed $2.058 billion to the New Zealand GDP, or 0.9% of the total GDP. Over the five years to 2016, the industry's contribution to the GDP grew by 3.7% per annum, compared with 2.5% per annum growth in the economy as a whole. In the two years to 2016, GDP growth in the performing arts industry was stronger than GDP growth in the total economy.

Participation has matched industry growth. A 2014 Creative New Zealand survey found that 85% of New Zealanders had attended a performing arts event or location in the past 12 months, and 58% had been actively involved in the creation or production of such an event in the same period.[126] Part of the attendance growth may be due to a turn-around in the economy, and an increase in domestic disposable income.

The events and entertainment part of the industry has also seen ongoing growth and contribution to local economies.

As an example of income derived from venues, in 2016, Auckland Live secured many headlining concerts and shows, attracting more than 800,000 people to 1074 events.[127] Meanwhile, Auckland Stadia attracted 285,000 people across 1153 community and commercial events. The summer line-up featured best-selling recording artists Adele, Justin Bieber, Guns N' Roses, Coldplay and Bruce Springsteen.

Major events in Wellington over summer 2015-16 were also a significant tourism driver. Westpac Stadium hosted a total of 62 major event days in the 2016/17 financial year, hosting over 480,000 fans.[12]

ECONOMIC CONTRIBUTION

$2.058B GDP

0.9% of New Zealand's GDP in 2016

Vicki Cooksley
President of Entertainment Technology New Zealand (ETNZ)

Even in tight economic times, people often go to shows and events as a means of escape. This makes the events and entertainment industry an important component to the wellbeing of the population.

Currently, there is a shortage of skilled senior practitioners across many of the disciplines within the industry, which has stemmed, in part, from a lack of training options, with most courses being classroom based and aiming towards the management side of the industry. This has led to a lack of skilled people on the floor.

There is also a perception that the industry does not offer a viable career path, as there were no nationally recognised qualifications.

With the lodging of the New Zealand Certificate in Entertainment and Event Technology on the New Zealand Qualifications Framework it is hoped that the current training void will be addressed. This qualification is designed to be able to be attained though several different approaches, including on-the-job learning, which reduces some of the barriers (such as cost), to predominantly classroom-based learning. It is hoped that having a nationally-recognised qualification will add legitimacy to the industry as a career option for new entrants into the workforce.

[126] *New Zealanders and the Arts, Creative New Zealand, 2014* [127] *Annual Report, Regional Facilities Auckland, 2017* [128] *Annual Report, Westpac Stadium, 2017*

Trends/Issues/Risks

POLITICAL

Health and safety responsibilities

With a typical performance being hosted by a venue, produced by a touring company, and delivered by a range of workers, from permanent staff through to freelancers and contractors, performing arts stakeholders have to be clear on the obligations of all parties under the new health and safety regime. This can be particularly challenging for smaller regional venues, with fewer resources.

Investment into event venues[129]

Councils continue to see the economic value of investment in event venues, with large developments and re-developments, integrating performing arts spaces with other usable spaces, occurring in major centres. However, local authorities nationwide are facing venue closures and big earthquake-strengthening bills, which impact on their ability to deliver performing arts and generate revenues.[130] With these changes continuing to impact on venues, innovation and entrepreneurship is developing and will continue to grow in New Zealand.

ECONOMIC

Vying for the arts funding pool

Performing arts professionals and companies are competing with each other and with other areas of the arts for a limited central funding resource from Creative NZ.[131] Applying for grants, fellowships and other forms of funding is a significant piece of work for many performing arts organisations, on top of their core activities. Despite this, there is a portion of the performing arts industry who run in a commercial nature, and therefore do not rely on external funding.

SOCIAL

Difficult schedules

The hours of work required of performing arts professionals can be extremely demanding, including long days, late nights, and stints of intense activity followed by periods of little or no work. 46% of 2017 survey respondents identified work hours as a barrier to recruiting staff in the performing arts industry. Industry professionals can experience stress, overwork and burnout.[132]

The needs of an ageing population

The power of the arts to stimulate minds and connect communities is becoming more important as New Zealand's population ages, and older people face a greater likelihood of isolation and loneliness.[133]

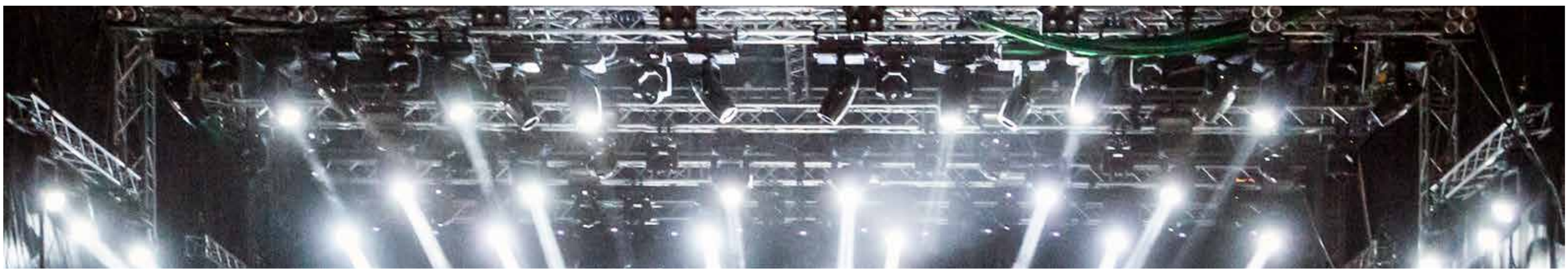
TECHNOLOGICAL

New technology and equipment

Automation and the fast pace of technological change could drive job losses or changes in environment and technical skill sets required, such as automation engineers and operators.

Mobile technology

The proliferation of tablets and smartphones creates an opening for forward-thinking performing arts organisations to reach attendees and participants in new ways.



[129] *Workplace Survey, Skills Active, 2017* [130] *Press release: Creative New Zealand to invest $24 million in NZ's arts organisations, Creative NZ, August 2017* [131] *Press release: Creative New Zealand to invest $24 million in NZ's arts organisations, Creative NZ, August 2017* [132] *Mental Wellness in the Performing Arts, Dr Tania Kopytko, DANZ Magazine, September 2016* [133] *The arts improve personal wellbeing, Advocacy Toolkit, Creative NZ, www.creativenz.govt.nz*

Training environment

Training in the performing arts happens at various levels, including at community level, through arts businesses (dance, drama or music studios, both private businesses and sole traders) or community projects (circus, drama, dance or music projects, or special training and events for youth, adults or older people). Specialist training takes place in public universities and polytechnics, private institutions, and in the workplace through on-job training.[134]

Access to and availability of suitable training is one of the biggest barriers for workplaces in training and developing their staff.

With the advent of a dedicated performing arts industry training organisation, the industry can look forward to better channels for recognising and building on the skills of its people from within.

BARRIERS TO INDUSTRY TRAINING AND QUALIFICATION COMPLETION

With more than 30% of the performing arts industry being self-employed, and many working less than full-time hours, the biggest barriers to training and development include:

- High self-employment level
- Lack of continuous work, and erratic hours
- Access to and availability of suitable training/assessment
- Cost and relevance of training.

There are many dance and music instructors who run their own businesses, and are unqualified. This highlights an industry need for qualifications related to small business management.

CURRENT AND FUTURE SKILL NEEDS

With a diverse set of occupations and roles in the industry, striking the right balance between certain skill sets is seen as a key skills development issue.[135, 136, 137] These skill areas include:

- Technical skills
- Health and safety understanding
- Customer management skills
- Production and event management.

The 2017 Skills Active Workplace Survey results indicated that many employers have difficulty staffing highly-skilled roles. Lack of skill and expertise was indicated as a barrier to recruiting by approximately 50% of respondents. Regional and remote venues and facilities find it particularly challenging to attract and recruit skilled employees.

[134] *Workplace Survey, Skills Active, 2017* [135] *Stage one needs analysis report for performing arts for the Targeted Review of Qualifications, Alison Viskovic, 2013* [136] *Skills and training needs in the cultural industry, ACNielsen, 2008* [137] *Workplace Survey, Skills Active, 2017*

Part two:

Workforce Transformation in Action

Skills Active Workforce Action Plan

Responses to a changing landscape

High-performing sport, recreation and performing arts industries call for a workforce that is fit for its purpose – skilled, experienced and motivated. We need our people to have the skills and capability to deliver services that meet and exceed the expectations of diverse participants, as well as their whānau, friends and communities.

Our goal: New Zealand has a sustainable, skilled and fit-for-purpose workforce in the sport, recreation and performing arts industries, leading to productive and sustainable organisations that provide quality services to New Zealand.

Purpose of the Workforce Action Plan

The Workforce Action Plan outlines the key focus areas for Skills Active, brought to light by the industry Workforce Scans, and sets the direction for our activities over the 2016 to 2018 period.

Developing an Action Plan that speaks to such diverse industries is a significant task. Skills Active believes this Action Plan offers an opportunity for industry stakeholders to work more closely with us and with each other, to realise workforce solutions that support the creation of quality sport, recreation and performing arts experiences for New Zealanders.

As a result of the intelligence gathered through the Workforce Scans, Skills Active has identified the following focus areas as the top priorities for our strategic work programme:

1. **Viable career paths:** More and better information about career opportunities in our industries
2. **Valued qualifications:** Qualifications that reflect current and future skill needs, and a clear and concise system for employers, workers and learners
3. **Skilled and safe workforce:** Support for the industry to become more responsive to public expectations of safety and service excellence
4. **On-job qualifications accessible to all:** A vocational training system that is relevant and appropriate to the demographics and trends of our industries (e.g. high staff turnover, seasonality, young and mobile workforce, volunteers)
5. **Staff retained and recognised:** Support for industry to reward and recognise staff, develop future leaders and keep skilled staff.

In order to successfully follow through on our Action Plan, it is important that we pull together the enormous reserves of experiences, skills and intelligence sitting with our stakeholders and partners.

In response to the challenges outlined in the Workforce Scans, in 2017/18, Skills Active is establishing industry-specific advisory groups to provide oversight and expert advice on the responses proposed by the Action Plan, including feeding into programme development and broader workforce initiatives.

Strategic context

The strategic context for the Action Plan is formed by the landscape of the sport and recreation, arts and culture, and education sectors in New Zealand. There are a number of direction-setting documents that have influenced the development of this work.

STRATEGIC PLAN AND COMMUNITY SPORT STRATEGY FOR 2015 - 2020

In 2015, Sport NZ released the Strategic Plan and Community Sport Strategy for 2015-2020. These strategies aim to respond to the trends and challenges of the industry and set a course for increasing participation and making positive change in the lives of New Zealanders.

The Community Sport Strategy is designed to deliver a participant-centred system, which increases the uptake of sport and recreation in New Zealand. The Strategic Plan aims to focus on four areas: young people; strengthening the local delivery of sport (especially in low-participation communities); ensuring traditional sport pathways remain strong; and driving high-performance outcomes through High Performance Sport NZ.

Bringing these strategies to life takes an effective and dedicated workforce, equipped to lead the industry into the future.

The Skills Active Workforce Action Plan supports the development of this sustainable, skilled and fit-for-purpose sport and recreation workforce, powering sustainable and productive organisations that provide quality services to New Zealand.

TERTIARY EDUCATION STRATEGY 2014 - 2019

The Tertiary Education Strategy 2014-2019 sets out the government's long-term strategic direction for tertiary education. The strategy highlights the need to build international relationships that lift New Zealand's global competitiveness, support business and innovation through the development of relevant skills and research, and improve outcomes for all.

The Workforce Action Plan links with the Tertiary Education Strategy priorities relevant to Skills Active, which are:

- Delivering skills for industry
- Getting at-risk young people into careers
- Boosting the achievement of Māori and Pasifika people
- Improving adult numeracy and literacy.

WORKFORCE PLANNING FRAMEWORK

Continuing the drive for a dynamic, effective and skilled workforce, Skills Active, Sport NZ and the New Zealand Recreation Association have jointly developed a Workforce Development Framework.

The Framework identifies four strategic priority areas:

- Plan for a vibrant and sustainable workforce
- Promote the industries as an attractive career and volunteering option
- Upskill staff and volunteers, and develop them for future roles
- Promote the recognition of staff and volunteers.

A fifth priority for Skills Active is national and regional leadership in workforce development.

Together the Workforce Development Framework and our Action Plan give us a clear work agenda. The Action Plan identifies specific industry needs under each of the Workforce Development Framework priority areas, and outlines the steps Skills Active is taking to address those demands.

LEADERSHIP
National and regional workforce development leadership that supports stakeholders to progress workforce development and plan for future workforce requirements

Priorities	**Plan for a vibrant and sustainable workforce** Information and research available to support workforce development planning	**Engage and recruit** Industries have a coordinated approach to recruiting and retaining staff, increasing their workforce capacity and capability	**Support and develop** All stages of workforce training and development are aligned to industry needs	**Reward, recognise and retain** Workplaces develop organisational cultures and systems that will attract and grow their workforce and meet business and service needs
Outcomes	Industry organisations understand current and future demand and take a proactive approach to workforce planning The industry has a coordinated approach to address challenges	Critical roles are filled by high-quality people within appropriate timeframes	Sport, recreation and performing arts professionals have the skills required to perform their roles and progress in their careers	Staff and volunteers feel valued in their roles

Skills Active Workforce Action Plan 2016 - 2018

The following pages outline the actions identified to respond to the Workforce Scans, and sets the direction for our activities over the 2016 to 2018 period. The Workforce Action Plan is divided into the five priority areas that were identified in the 2016 Workforce Scan. Newly-developed Industry Advisory Groups are working with Skills Active on industry-specific workforce development solutions.

PRIORITY AREA	HIGH-LEVEL ACTIONS	REVELANT INDUSTRY TRENDS, ISSUES AND RISKS
PRIORITY AREA 1 **VIABLE CAREER PATHWAYS** Skills Active will support the industries to improve information about available career opportunities by:	A. Developing and providing tools to industry to plan, develop and support careers B. Promoting career pathways to encourage increased participation by Māori and Pasifika C. Developing programmes for schools and other youth that promote engagement in our industries' career pathways D. Developing and promoting New Zealand Apprenticeship programmes.	• Need for increased visibility of viable career pathways • High staff turnover • Slow predicted employment growth in some industries • Need for higher workforce representation of all ethnicities, especially those who identify as Māori or Pasifika.
PRIORITY AREA 2 **VALUED QUALIFICATIONS** Skills Active will ensure qualifications reflect current and future skills requirements by:	A. Completing the Targeted Review of Qualifications (TRoQ) across the industries, resulting in a new suite of relevant qualifications listed on the NZQF, including: - Responding to the need to ensure qualifications include an understanding of the link with health and wellbeing - Responding to the need to ensure qualifications include outcomes relevant to an increased use of technology - Responding to the need to ensure health and safety requirements are embedded across qualifications - Where there are existing industry awards that are valued, align these to the NZQF qualifications B. Carrying out research on the return on investment for workplaces qualifying their staff C. Working with international partners to achieve international recognition for our industry qualifications.	• Greater responsibility under the law for businesses to keep staff and clients safe • Technological changes constantly impact on the skill requirements for many jobs • Increased recognition of our industries' impact on wellbeing • Many employers and their part-time, seasonal and contract staff find it hard to see the return-on-investment for undertaking qualifications.
PRIORITY AREA 3 **SKILLED AND SAFE WORKFORCE** Skills Active will assist the industries to be responsive to the increased public expectation of higher standards and increased safety by:	A. Supporting the development of NZQF programmes to produce skilled management and supervisory staff B. Promoting the recognition of qualifications as a benchmark for competency C. Providing tools where our industries can manage the currency of employees' skills through registration (NZRRP) D. Providing a service where employers are supported to provide high standards of operation and quality delivery, and can measure their safety systems against health and safety requirements (Qualworx products such as OutdoorsMark) E. Ensuring workers and management are skilled in health and safety.	• Many employers identified skills shortages as a recruitment barrier • Meeting the requirements of the recently enacted health and safety legislation is an issue across all industries • The arts and recreation services industry has among the highest rate of injury in New Zealand.
PRIORITY AREA 4 **ON-JOB QUALIFICATIONS ACCESSIBLE TO ALL** Skills Active will ensure the vocational training system is relevant and appropriate for the industries by:	A. Supporting Māori and Pasifika people to achieve qualifications B. Providing varied workforce development solutions that are effective in various sizes and types of workplaces (programmes, assessment models, support mechanism and delivery modes) C. Providing continuing professional development (CPD) packages, outside the NZQF, where industry determines a need.	• Access and availability of suitable training and assessment is a barrier • Need for more cultural diversity across our industries • Need for more qualified sport, recreation and performing arts professionals • The cost of training and qualifying staff is a barrier for some workplaces • A recruitment barrier for employers is finding work-ready applicants with the appropriate skills and qualifications.
PRIORITY AREA 5 **STAFF RETAINED AND RECOGNISED** Skills Active will work with industry to reward and recognise staff to develop future leaders and retain staff by:	A. Supporting graduation ceremonies to celebrate the achievement of NZQF graduates B. Supporting the recognition of star performers through industry award events C. Communicating and promoting success stories D. Promoting the value of recognising qualified staff with increases in remuneration and career progression.	• High rate of volunteer and paid staff turnover • The seasonal nature of some of our industries attracts a high volume of short-term contract staff • Employers may struggle to see the return on investment for training their seasonal, part-time, volunteer or contract staff.

Priority area 1: **Viable career pathways**

Plan for a vibrant and sustainable workforce | Support and develop | Engage and recruit

Our industries are experiencing political, economic, social, technological and demographic change. Therefore, in order to maximise and retain our current workforce as well as attract new people, we need a carefully considered plan of attack.

Accurate and timely information about careers and professional development is critical to retention and recruitment in our industries. We also need better knowledge and tools supporting the industries to develop their workforce.

We must continue to grow participation in key groups such as Māori, Pasifika and youth, and we need to support hard-working and ambitious individuals to stay in our industry and build fulfilling careers.

Outcome: Career information is easily accessible and industry stakeholders have the right tools for career planning and workforce development.

A: Developing and providing tools to industry to plan, develop and support careers

- Develop pan-industry workforce planning tools
- Develop career profiles and planning tools for staff and workplaces
- Continue to deliver existing resources, including the Workforce Scan.

B: Promoting career pathways to encourage ongoing participation by Māori and Pasifika

- Work with successful Māori and Pasifika workplaces that can serve as role models for industry
- Develop culturally appropriate career planning tools for Māori and Pasifika
- Promote culturally appropriate programmes for Māori and Pasifika.

C: Developing programmes for schools and other youth that promote engagement in our industries' career pathways

- Develop career mapping tools for youth and schools
- Take part in appropriate career roadshows to promote sport, recreation and performing arts careers
- Add to our suite of sport and recreation Youth Awards for school students
- Work with the Ministry of Education to broaden the vocational pathways that transition school students into industry careers.

D: Developing and promoting New Zealand Apprenticeship programmes

- Develop relevant and practical apprenticeship programmes for each industry
- Continue existing awareness campaign on the benefits of apprenticeships for individuals and businesses
- Launch an Apprentice of the Year award to promote sport, recreation and performing arts apprenticeships and careers.

Priority area 2: **Valued qualifications**

Support and develop

Nationally and internationally recognised qualifications that meet the needs of industry are those that reflect the skills required now and in the future. They need to represent a valued investment for business owners and their staff.

NZQA's Targeted Review of Qualifications process is developing a suite of relevant qualifications aligned to the changing demands of our industries. This includes an increased focus on the links between sport, recreation and health; new applications of technology; embedding a positive health and safety culture; and alignment, where appropriate, with industry awards.

Outcome: Qualifications are fit-for-purpose and valued by our industries, reflecting current and future needs.

A: Completing the Targeted Review of Qualifications (TRoQ) across industries, resulting in a new suite of relevant qualifications listed on the NZQF

- Finalise qualifications listed following the Targeted Review of Qualifications
- Create shorter, modular learning packages in response to the need for agile and specific upskilling, and explore pricing options for industry
- Continue to identify dual recognition qualification opportunities with the industry, where appropriate
- Investigate cross-sector approaches linking health with sport, recreation and performing arts career pathways
- Develop new technology approaches including more online learning, web-based communities for assessors and trainees, and competency registers integrated with the Skills Active trainee management system.

B: Carrying out research on the return on investment for workplaces qualifying their staff

- Complete return-on-investment case studies demonstrating the value of on-job training for specific cohorts
- Quantify top line and productivity gains and risk management outcomes for on-job training users.

C: Working with international partners to achieve international recognition for our industry qualifications

- Consult with other jurisdictions on international recognition for New Zealand awards and qualifications, in order to increase global portability
- Collaborate with partners to benchmark learning packages, programmes and resources across borders
- Investigate the market for collaborating with and supplying learning resources to international providers
- Support global standards of practice allowing the overseas registration of New Zealand-trained staff, for example via the International Confederation of Registers of Exercise Professionals.

Priority area 3: **Skilled and safe workforce**

Support and develop | Reward, recognise and retain

In the context of a new legislative landscape, sport, recreation and performing arts participants and customers expect our industries to prioritise health and safety. We are supporting professionals in our industries to meet this demand through the development of skilled managers and leaders, industry-specific health and safety training, recognition of qualifications as a benchmark for competency, and a registration system to manage the currency of employee skills. We also champion high standards of operation through our Qualworx audit accreditation service.

Outcome: Industries can identify, support and grow their own skilled and competent leaders, managers, supervisors and staff.

A: Supporting the development of NZQF programmes to produce skilled management and supervisory staff

- Develop appropriate health and safety programmes for supervisors and managers
- Develop learning and upskilling packages for leadership staff that are tailored to each industry and follow qualification pathways to Diploma level
- Investigate mentoring and assessment support options for leadership training
- Develop skilled management and supervisory staff by contributing to the Sport NZ leadership framework and developing programmes to achieve appropriate New Zealand Qualifications.

B: Promoting the recognition of qualifications as a benchmark for competency

- Present to industry conferences, educating and promoting the value of qualified staff
- Promote shared messages with industry partners around the value of qualifications and workforce development.

C: Providing tools where our industries can manage the currency of employees' skills through registration (NZRRP)

- Work with industry to develop and promote the use of NZRRP, and increase understanding of the purpose and benefits of NZRRP and ActiveCV
- Integrate web platforms, linking tools like NZRRP, ActiveCV, and online career tools.

D: Providing a service where employers are supported to provide high standards of operation and quality delivery, and can measure their safety systems against health and safety requirements (Qualworx)

- Continue to develop and grow Qualworx, providing a responsive and fit-for-purpose audit service for adventure activity operators
- Update Qualworx systems to deliver seamless service provision and monitoring
- Expand the scope of Qualworx to include a wider range of sport and recreation operators
- Explore the qualification needs of industry relating to safety auditing.

E: Ensuring workers and management are skilled in health and safety

- Embed foundational health and safety into programmes
- Investigate the development of a health and safety Level 4 programme jointly with Sport NZ
- Embed health and safety training into new management qualifications.

Priority area 4: **On-Job qualifications accessible to all**

Support and develop

Vocational training must be designed with users in mind. Skills Active is building workforce development solutions that meet the needs of wide-ranging industries that include small and medium enterprises, non-profit organisations, niche businesses and large employers. We are consulting with industry to develop responses such as off-job learning solutions, tailored programmes for Māori and Pasifika, and other culturally appropriate workforce approaches for the full spectrum of sport, recreation and performing arts in New Zealand.

Outcome: All organisations can access and engage with on-job training that meets organisational needs and the needs of individual staff.

A: Supporting Māori and Pasifika people to achieve qualifications

- Co-design mentoring and pastoral care schemes, community and whānau-based pilots, and other initiatives that will support qualification completion.

B: Providing varied workforce development solutions that are effective in various sizes and types of workplaces (programmes, assessment models, support mechanisms and delivery modes)

- Refine our local government qualification strategy and align career pathways with organisational needs
- Develop on-job training resources for use in small businesses and non-traditional work settings, for example, within the fitness industry
- Build a pan-industry full-service model that can be tailored to the needs of different workplaces, environments and assessment practices
- Work with tertiary providers to create access to off-job and theory-based learning for our higher-level qualifications, including First Line Management and the theory components of apprenticeships
- Through market research, examine the workforce development needs of a diversifying New Zealand population.

C: Providing continuing professional development (CPD) packages, outside the New Zealand Qualifications Framework, where industry determines a need

- Explore demand and pricing for shorter, modular learning packages providing specific learning and development solutions for industry.

Priority area 5: **Staff retained and recognised**

Reward, recognise and retain

To recruit quality people into our industries, hold on to them and develop them into future leaders, we must make sure staff feel valued. This means increasing the recognition of trainees through graduation events, celebrating success stories, and putting the spotlight on outstanding achievement through industry awards. It is also vital for organisations to understand the value of qualified staff, and reflect that value through increased remuneration and career progress that recognises and retains bright stars.

Outcome: Staff feel valued and choose to build long-standing careers in our industries.

A: Supporting graduation ceremonies to celebrate the achievements of NZQF graduates

- Support and promote industry training graduation ceremonies, recognising recent graduates.

B: Supporting the recognition of star performers through industry award events

- Develop a pan-industry award and recognition framework of events and rewards at all levels including trainees, apprentices, assessors, managers and workplaces
- Explore the development of specific awards for certain types of stakeholders, such as young graduates, small and medium businesses, large businesses, and Māori and Pasifika organisations and trainees.

C: Communicating and promoting success stories

- Identify a range of participants and groups with positive industry training experiences and achievements, including Māori and Pasifika, younger trainees, older trainees, small businesses, community providers, large organisations, and career changers
- Work with individuals and organisations to communicate their success stories externally
- Use marketing, mainstream media, niche media and social media to promote industry success stories.

D: Promoting the value of recognising qualified staff with increases in remuneration and career progression

- Conduct market research to demonstrate the connection between qualified staff and improved business outcomes
- Promote case studies where qualifications have led to increased incomes and career progression for individuals
- Raise awareness of benefits of career progression that New Zealand Apprenticeships deliver for workplaces and staff
- Work with specific organisations to link qualification achievement to performance management systems.

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