



**The Active Essex CSP and Creative  
Sport and Leisure Sport Skills Strategy  
2018**

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# 1 Executive Summary

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## Overall new or evolving messages

- 1.1 Sport as cross cutting between (several) SELEP priority sectors including: DCMS Creative Industries, Health, Tourism and Education.
- 1.2 Sport as a growth sector in its own right – 2016 data shows a big upturn across Essex, and, Sport is driving shifts towards new economy and lifestyle sectors.
- 1.3 There are opportunities around new ‘T’-level qualifications, and links to 29 skills capital projects being delivered. Further opportunities to develop ‘trailblazer’ apprenticeships can stem from these.
- 1.4 There is a growing need – given its contribution – to recognise sport as a strategic enabler (cross-cutting, driving growth – but in need of complementary investment in terms of skills and business support for emerging models of delivery, networking).
- 1.5 Growth can be linked to growth in demand for new ‘types’ of skills, demonstrating the need for a step change not just in terms of quantity [ie number of jobs] but also quality: roles will need to target new demographics and deliver against multiple agendas such as health. This has given rise to considering how something such as a ‘sector deal’ could support a full-scale roll-out of this approach. Given the initiatives about to be delivered – case studies that support the value / return on investment and wider impacts could be developed with a view to exploring the potential for a sector deal. This report provides an evidence base and set of recommendations which will underpin the sport skills action plan for Active Essex CSP and partners.



## Original Executive summary from the 2016-17 research

- 1.6 The research presented is timely because the sector stands at a key moment in terms of the changing role and remit of Community Sport Partnerships (CSP’s). This research and report will inform and steer the sectors’ future work, and support the design of interventions to impact on qualification and skills provision for Greater Essex.
- 1.7 Taking stock of the increasing alignment of the health and wellbeing agendas as well as changes to the skills accreditation frameworks in terms of license to practice and reform of coaching-skills frameworks also represent a large opportunity for the sector workforce to grow and deliver activity against new types of demand.
- 1.8 It is clear that the sport and physical activity sector influences many agendas within a locality and Essex is no exception. Influencing the Public Health agenda, planning policy as well as developing the economy and tourism all contribute to place-shaping in support of county outcomes.
- 1.9 Our findings from analysis of sector and occupational data have revealed:

- Gross Value Added (GVA) from the sector represents 4.45% of the total value generated in the Greater Essex economy; health and volunteering make up 61% of this total value.
- Sport businesses represent 2.7% of the business base, with growth and dynamism in all three sport sub-sectors.
- Employment represents 3.1% of all employment, is relatively less dynamic than the business base, but with growth in and significant shifts towards health focussed roles.
- There are 21,409 employees in the sector, but 7,981 sport specific occupations within this (37.3% of sector employment).
- We have also found 3,100 self-employed people working in sport roles, and our total estimate for sport skills demand is 11,081 people across Greater Essex.

1.10 Stakeholders engaged as part of this consultation and analysis have determined 4 key themes for action. This report seeks to provide evidence in support of and drive an action plan to ensure the workforce of the future is fit for purpose. The themes include:

#### **Theme 1: Training, jobs and skills**

1.11 Both CIMSPA, Sport England and the CSPN recognise the importance of professionalising the sport workforce, and the opportunities for reformed qualifications and training frameworks were actively highlighted by the majority of stakeholders consulted.

1.12 This theme considers working with and convening skills providers to understand the implications of the emerging new customer base for sport on skills frameworks and curricula. It may also extend to developing an exemplar pilot scheme that reflects this new need for customer specific skills – for example a ‘sport for mental health’ qualification or module.

#### **Theme 2: Partnership**

1.13 Active Essex CSP and Creative Sport and Leisure will make great strides by working with partners to deliver the Sport and Physical activity vision for Essex, playing a co-ordination and brokerage role rather than taking on direct delivery. To do this effectively, the objectives of a diverse set of organisations will need to be galvanised around an action plan which underpins more effective joint working.

1.14 Continuing to deliver CPD which gives existing coaches, instructors and volunteers access to groups where they can impact most (i.e. with the inactive, disabled, young, very old; *and against all 5 priority areas*). With this comes the need to regularly review the process and look for opportunities to improve impacts and address gaps.

#### **Theme 3: Funding and finance**

1.15 Funding for sport, physical activity and community development agendas is available through a variety of sources, but many organisations lack the capacity to bid for and access multiple sources, limiting them in delivering beyond a core offer. Given the fast-evolving demand, more flexible access to appropriate funding; and, improved access to existing physical sport assets (e.g. in schools) can help enable growth.

- 1.16 Working with Sport England to deliver programmes while exploring the potential for Active Essex to manage a 'single CSP-wide pot' with aligned objectives. A case could be made for how this could unlock positive outcomes through greater flexibility, and address gaps in current provision.

**Theme 4: Awareness Raising**

- 1.17 The current pace of change in the sport sector has implications for all sport and physical activity businesses, coaches and organisations. Some are better placed to understand the opportunities (or threats) this may entail than others. To ensure maximum take-up and enable employers and deployers to forward plan, more needs to be done to communicate opportunities to the widest audience.
- 1.18 Recognising the economic contribution of sport and promoting this through partner networks (EEC; districts and UA's; SELEP), highlighting how the cross cutting impacts of sport and its role in supporting a range of wider agendas such as reducing cost burdens.



## 2 Top line messages for strategic partners, and sport stakeholders

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### 1 - Promote the impact and strategic importance of Sport as a sector

- 2.1 Recognise that the impacts of sport are wide ranging, and that the benefits of sport and physical activity support all 5 pillars of need identified in the Essex Economic Commission, and also strategic priorities for SELEP. Promote Sport as a strategically important sector at both the Essex CSP and the SELEP level, with equal or greater significance than the Creative Industries sector in terms of 'outcomes' for residents and businesses.
- 2.2 The most recent data shows that skills demand from Sport Sectors has risen by 24% in 2016, adding 2,840 jobs to the economy of Greater Essex. In 2015 Sport generated 4.45% of Essex GVA<sup>1</sup>, but recent findings show that Sport is disproportionately driving employment growth, contributing 14.95% of the total 19,000 jobs added to the economy in 2016. *This growth does not include sport occupations in education and health roles.* The significance of sport in the economy is increasing, both as an economic sector and in terms of cross-cutting occupations in health. In order to sustain this positive and cross-cutting contribution - strategic bodies such as the SELEP Skills Board and Greater Essex Economic Commission should give formal recognition to the sport sectors importance, also recognising Active Essex as a body that can enable and support ongoing growth.

### 2 – Use a 'single pot' to leverage growth

- 2.3 Continue to work with Sport England and other national partners to bring in funding; explore the potential for Active Essex to manage a 'single pot' which aligns Sport England objectives with Essex and SE-LEP priorities. Funding should be allocated by using and prioritising an outcomes-and-impacts focus.
- 2.4 The scale of recent sector growth and employment demand highlights that Sport will need strategic support to enable the delivery of sport skills to keep pace with sector demands. A single dedicated fund for the area would support the investment needed in the next generation of sport-coaches and instructors, avoiding a piecemeal approach where fragmented funds do not address the step-change needed to sustain the high growth seen recently.

### 3 – Focus on reducing distance between coach and customer

- 2.5 Target CPD, and funding for sport training, at developing the sport workforce to deliver to the most inactive groups where the impacts are greatest. Explore new models that can support delivery of sport and physical activity in non-traditional settings, reducing distance and friction between coach and customer.
- 2.6 Promote innovation in sport marketing and promotion – in particular at 'high inactivity' groups. Acknowledge that 'distance' is also created by languages and messaging used; and support services which are targeted at inactive groups through Active's local networks using messaging that promotes inclusion.

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<sup>1</sup> Based on the Sport England: 'Economic Value of Sport' model

#### 4 – Create a best practice pilot in a ‘sport for health’ qualification

- 2.7 Work closely with skills providers to help them understand the implications of the focus on ‘inactive’ groups as the emerging priority customer base for Sport – in particular with respect to the increased need for a ‘license to practice’ framework to enable delivery in health-related settings. Develop an exemplar pilot to demonstrate best practice in, for example, a Sport for Mental Health programme.
- 2.8 Promote digital skills for sport in an embedded way across sport training, with a focus on the way that this approach can enable individual coaches to record and monitor impact. Digital and mobile monitoring are likely to play key enabling roles in terms of accessing license to practice frameworks through providing supporting frameworks to manage sensitive data, for example.
- 2.9 An agreed shared digital framework for sport and health could be supported by Active Essex working with local public health bodies to establish a principle of shared interests moving forwards in terms of digital monitoring and safeguarding.

#### 5 – Work at scale to develop industry led solutions; explore the potential of a GTA model

Consider partnering with neighbouring CSP’s in Kent and Sussex to deliver successful initiatives at scale across SELEP. Explore the potential to develop a Group Training Association (GTA) which can support a step change in sector skills delivery, at scale. Working with neighbouring CSP’s and Sport England: explore the role a potential of a GTA to underpin links with wider national funding opportunities for industry-led training. Promote financially sustainable industry led solutions which are cost neutral to CSP’s.

## 3 Introduction

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### The Purpose of the Strategy

- 3.1 Shared Intelligence was commissioned by Active Essex and Creative, Sport and Leisure Ltd to create a demand led and evidence based skills action plan. This plan is intended to steer and inform future

skills development for the sector, designing interventions which will impact positively on qualifications and skills provision.

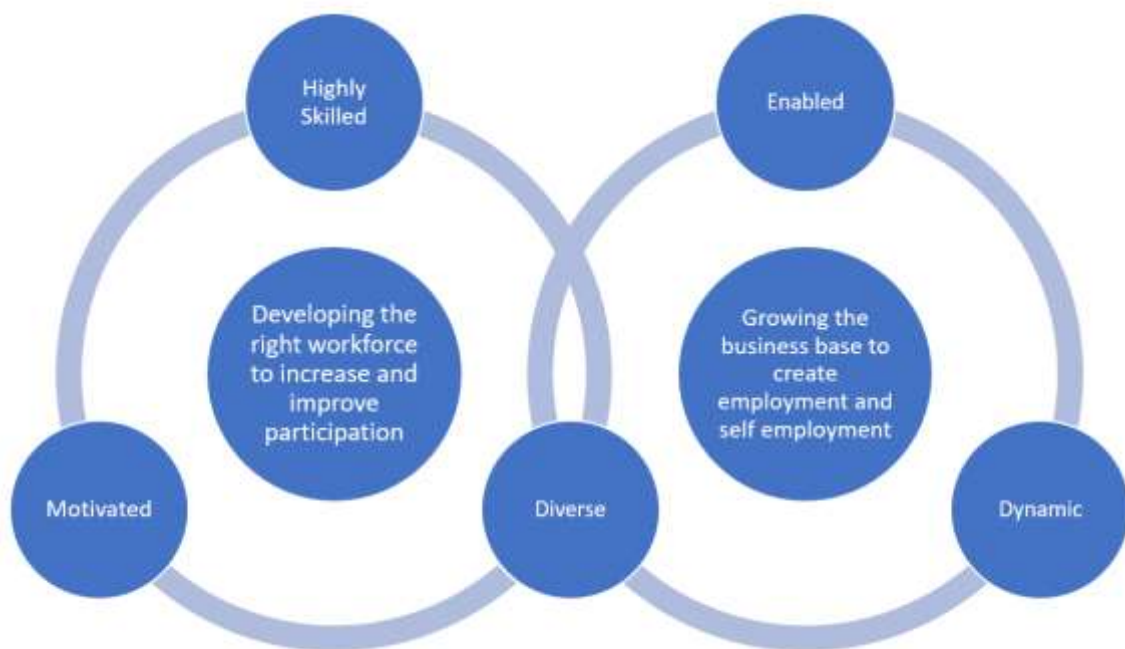
- 3.2 We understand that this starts with research into the needs of sporting employers and close engagement with education providers to gain a better understanding of their challenges and opportunities. A combination of focus groups, face-to-face interviews and telephone follow up interviews alongside desk-based research helped to determine economic aims as driven by the Active Essex Strategy.
- 3.3 This piece of work is important because of its links to the delivery of the Creative Sport and Leisure 'Creating Sector Leaders' plan and the emerging Active Essex Strategy and its on-going success. It will underline the position of a number of key strategic partners across Essex and ensure positive economic contributions to the overall future of the Essex economy.

It supports the existing research that evidences that sports participation, volunteering and leadership can have on socio-economic outcomes. These important factors help to contribute to a healthier workforce, an increasing level of employability and embed soft skills while attracting a new workforce to the area.

### The Vision for the Sport Skills Action Plan

- 3.4 In creating a vision, stakeholders were asked to outline the most important factors for delivering a workforce that is fit for the future. In considering the wider determinants of sport impact, several key words focused the intended outcomes and the ultimate vision.
- 3.5 The Active Essex and Creative Sport and Leisure sport skills action plan will support the sport sector by enabling employers, deployers and workers to be increasingly:
- **Highly skilled** – leading to; increased employability of learners and leavers; improved opportunities for in-work CPD; and increased knowledge of new skills frameworks and opportunities and how they connect to different 'career' outcomes.
  - **Dynamic** – growing commercially and investing in growth; increasing delivery in response to need; increased entrepreneurial behaviour and more self-employment.
  - **Diverse** – delivering more *types* of sport and activity and increasing participation in activity, volunteering and coaching from currently under-represented groups identified.
- 3.6 This will lead to increased participation, delivery of CSP and partner objectives servicing all areas of the Active Essex CSP appropriately. The two-core outcome-objectives of the strategy which can form a virtuous cycle are therefore considered to be:
- Developing the right workforce to increase and improve participation.
  - Grow the business base to create employment and self-employment.





3.7 Two other factors will also be key to success: Funding is crucial in terms of enablement: developing pilot initiatives and rolling out successes; and, marketing and positive promotion of opportunities in the sector creating ambition in the sector to produce leaders of the future, and broker more positive experiences between sport employers and school leavers.

### Potential developments

3.8 There is significant alignment of agendas from national government departments, funding bodies, sector skills accreditation bodies; and, ambition within Essex to support the sector to grow and deliver cross-cutting benefits which can also address issues raised in the Essex Economic Commission.

3.9 CIMSPA note in their 'Raising the Bar' report that:

*"Physical activity has been labelled by the Academy of Medical Royal Colleges as a 'miracle cure,' able to manage, treat and prevent over twenty serious lifestyle-related conditions. In recent years its profile has grown in the medical community as one of the most powerful lifestyle behaviour factors that doctors should promote to improve the overall health and wellbeing of their patients".*

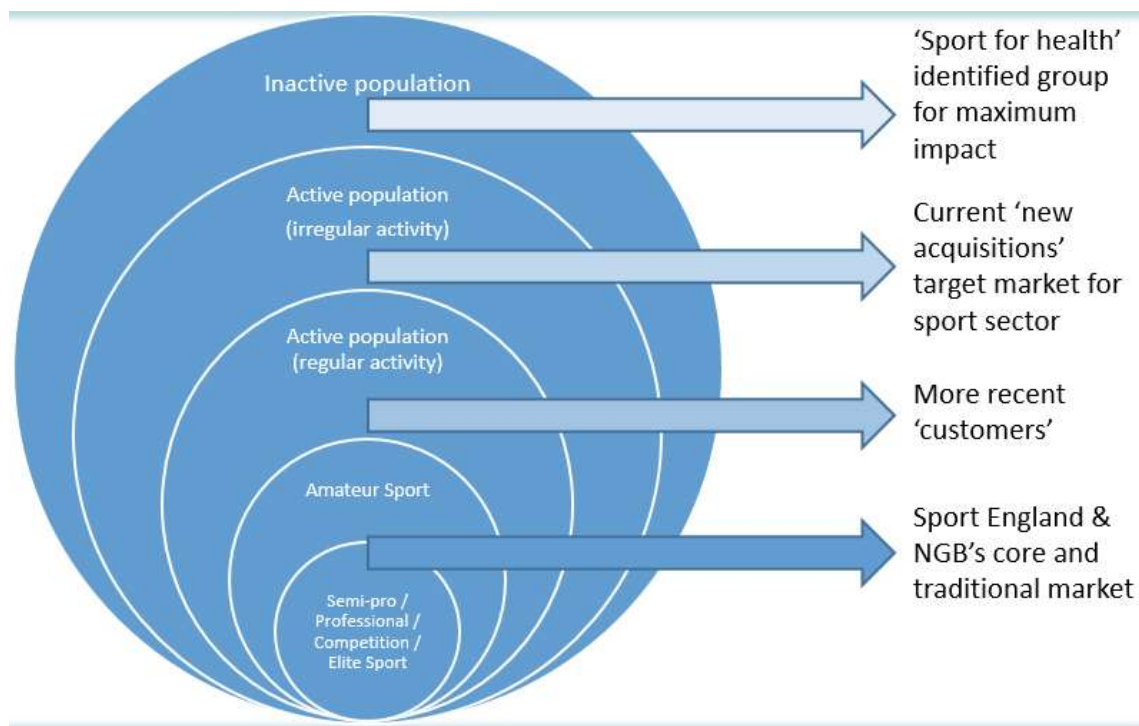
3.10 This is significant as the core physically active market for sports is only around a third of the population. The targeting of resources by the NHS potentially creates new demand from significant proportions of the remaining two-thirds of the population, and the sport sector will need to increase the supply and variety of activities available to address this demand. Up-skilling will be important: reform to the coaching strategy, and the creation of higher standards – potentially in a health module format – which satisfy the more stringent 'license to practice' requirements of the NHS will be key to the sectors ability to do this.

3.11 A key conclusion is that there is a large 'big win' for the sports and physical activity sector in terms of demand growth generated by shifting health delivery and HWB agendas – but that the sector risks

an under-supply of the required workforce to deliver against this demand if it cannot keep up with the requirement for workforce professionalisation.

3.12 In meeting this requirement and creating a step-change in skills delivery for the sport workforce there are also significant opportunities to address several of the wider issues the Essex Economic commission has raised including: raising skill levels alongside increasing demand for higher level roles in the sector; recognising sport as a cross-cutting opportunity sector able to support wider productivity growth; recognising the value of embedding healthy behaviours in transport planning; enabling employment growth with minimal need for hard infrastructure investment; the need to deliver more targeted activities to deprived and less active coastal district areas.

**Diagram to highlight how the remit of sport has expanded over time**



# 4 Policy drivers

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## National context

### The Department for Culture Media and Sport

4.1 The DCMS has recently shifted its focus towards a more inclusive vision for sport, which places much greater emphasis on the wide range of impacts and benefits sport can have. This falls under 5 broad themes:

- physical wellbeing;
- mental wellbeing;
- individual development;
- social and community development;
- and economic development.

4.2 This is significant in terms of where funding will be directed in future as all new government funding for sport and physical activity will go to organisations which can best demonstrate that they will deliver some or all of these five outcomes. Funding will also be distributed in a way that focuses on those people who tend not to take part in sport, including women and girls, disabled people, those in lower socio-economic groups and older people.

### Sport England

4.3 In response to the DCMS report Sport England has published 'Sporting Futures' which is their new coaching strategy acknowledging the shift in focus and priorities away from purely elite sport towards a more inclusive model. Importantly, Sport England is responsible for administering DCMS funding, and awarded a total of 18 grants across Essex in 2014/15 totalling £139,608.

4.4 Sport England has widened its remit to deliver sport outside of schools from the age of 5 rather than 14, and has shifted the focus of its approach to coaching to reflect the need for sport deliverers to undertake more targeted outreach work. A revised skills framework for coaching is in the process of being developed.

### Meeting the needs of new customers

4.5 In terms of addressing the needs of an increasingly diverse group of people, new skills will be required to deliver effectively.

4.6 Some of these will be 'soft' skills which simply relate to adapting to customers with different behaviours and motivations, and these are valued highly by people encountering sport initially, and have been shown to support sustained levels of activity from participants.

4.7 A more specific barrier to engaging some groups of customers – for example children, those with vulnerabilities or mental health issues – is in the requirement for safeguarding. In order to be able to deliver sport to people who may be referred by NHS and HWB partners, coaches will need to meet

higher standards and requirements. One stakeholder reflected in conversation that mental health awareness training should in future be much more embedded in coaching qualifications.

- 4.8 In 2014/15, Active Essex delivered 48 workshops with 723 attendees covering working with Children, First Aid and Safeguarding. There are 1,253 registered coaches in Essex. Future developments and their implications for CPD and training requirements will need to be monitored.

## Health crisis

### Obesity – an epidemic

- 4.9 Nationally one fifth of children will be obese or overweight when they start school in Reception Class. By the time they leave primary school this figure will have increased to one third. Children from deprived backgrounds are twice as likely to be obese at both the start and finish of primary school which points to a significant health inequality issue resulting in an even greater need now for the targeting of services at areas with higher rates of deprivation.
- 4.10 There are also specific areas in Essex such as Basildon, Castle Point, Harlow and Tendring where the prevalence of obesity at year 6 is noticeably higher than elsewhere in the county and higher than the regional average. The trends are not improving and, to the contrary, highlight the numbers obese at Year 6 actually to be increasing so what is currently being targeted at children and young people is not enough. Urgent and bold action is required to address this. The most effective interventions will be those that focus on prevention and promoting a healthy lifestyle from an early age.
- 4.11 The cost of ineffective action is significant with the total cost of obesity to the health system currently estimated to exceed £5 billion per year. It is also one of the risk factors for Type 2 diabetes, which accounts for spending of £8.8 billion a year – almost 9% of the NHS budget. The wider costs of obesity to society will be significantly more than this.<sup>2</sup>

### Ageing society

- 4.12 We have an ageing population – the number of people aged 60 or over is expected to pass the 20 million mark by 2030 (Office for National Statistics, 2015) and 42 per cent of people aged 55 and over are inactive compared to 29 per cent of the population as a whole.
- 4.13 Research shows that as you get older, you're far more likely to be inactive and do less than 30 minutes of physical activity a week. But those who are least active stand to benefit the most in terms of their health and happiness by getting active, even if it's just small changes like walking slightly faster or further than normally or planning 10 minutes of yoga with friends or work colleagues every morning.
- 4.14 Sport England want to work with partners to learn and understand more about how to support inactive older adults. In particular, to test new ways of tackling inactivity, and find approaches that could be replicated across the country that make a significant difference to many more people's lives.<sup>3</sup>

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<sup>2</sup> Source: [‘Obesity Issues in Essex’ \(Jan 2016\)](#)

<sup>3</sup> Source: Why we're investing in inactivity, Sport England (2015)

## Behavioural change & the need to increase participation

### Active groups

- 4.15 The Active People Survey is conducted annually by Sport England to monitor impacts and understand customer motivations and behaviours, and was last run in 2015/16.
- 4.16 The number of 'active' people who engage in some level of sport or physical activity at least once a month for 30 minutes or more has risen since the survey began, but is still less than half of the population.
- 4.17 There is a variety of abilities and needs within the 'active' group, and of the total 43% of the population that is active, the largest segment is those that are the most active. Existing demand for coaching has historically been skewed towards this 'semi-pro and elite' group who are active 3 or more times per week.
- 4.18 The less active groups, including people who may only be active for 30 minutes once every 28 days are therefore not the core target market of traditional coaching. Further, traditional sports coaching and sport science training does not necessarily reflect the needs of these less active people.
- 4.19 Creating inclusive approaches which support people sustaining activity is therefore key, and the active people survey highlights that a range of gaps and barriers to this currently exist, while Sport England has mapped a number of key under-represented groups which it is now prioritising (see above). The Birmingham Way has done research into barriers for active people taking part, and found that they tend to be practical, to do with cost, how far away it is and what time it starts being more important factors. Inactive citizens were more likely to state barriers based on motivations such as finding time, feeling uncomfortable and not wanting to attend alone<sup>4</sup>.

### Inactive people

- 4.20 The inactive group – those who do no physical activity for 30 minutes in an average month – make up 57% of the 16+ population.
- 4.21 The costs of inactivity are very large, and as has been identified the greatest impacts and downstream benefits are gained from tipping inactive people into doing some activity as the inactive group represent a disproportionate cost to the NHS. A conservative estimate using the most recent cost data collected at the CCG level physical inactivity directly costs the NHS in England more than £450m a year.<sup>5</sup>
- 4.22 Another study looking at lifetime costs (rather than current Physical inactivity costs) among today's 11-25 year olds will cost the UK economy £53.3 billion over their lifetimes.<sup>6</sup>
- 4.23 The ability to engage and sustain people in activity is therefore of growing importance to the national economy, with long-term cost saving being greatest where the young are sustainably engaged in sport, and the immediate benefits very high for older people.

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<sup>4</sup> Sport Birmingham and Know Research 'The Birmingham Way (2016)'

<sup>5</sup> [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/524234/Physical\\_inactivity\\_costs\\_to\\_CCGs.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/524234/Physical_inactivity_costs_to_CCGs.pdf)

<sup>6</sup> <https://www.cebr.com/reports/the-inactivity-time-bomb/>

4.24 Studies have found<sup>7</sup> that inactive people are generally less willing to travel to take part in activities, with the average active person willing to travel around twice as far (30 mins) as the average inactive person (15 mins), and this means that in order to increase engagement with the inactive group activities will need to reduce the distance between sport, coach and customer.

4.25 The figure below highlights the national picture for people 16+ from the Active People Survey<sup>8</sup> the size of the inactive group and the need to engage people before the age of 16 are helping re-focus DCMS, Sport England and other bodies to drive new interventions to address weaknesses in the current approach.

Customer Group	Definition aligned with Active people survey	Percent of all 16+ (2015/16)	Number of 16+ adults in England (2015/16)
Inactive	Zero sessions of at least moderate intensity for at least 30 minutes in the previous 28 days	57%	25,318,300
Active – irregular at risk of inactivity	Less than one session a week (1 to 3 sessions of at least moderate intensity for at least 30 minutes in the previous 28 days)	6.9%	3,056,100
Active – regular physical activity	One session a week (4 to 7 sessions of at least moderate intensity for at least 30 minutes in the previous 28 days)	10.7%	4,740,700
Active – amateur sport	Two sessions a week (8 to 11 sessions of at least moderate intensity for at least 30 minutes in the previous 28 days)	7.9%	3,505,100
Active – semi-pro and elite sport	3 sessions a week (at least 12 sessions of at least moderate intensity for at least 30 minutes in the previous 28 days)	17.5%	7,761,000

## Local Context

### Active Essex

4.26 Active Essex is a publicly funded organisation, hosted by Essex County Council, whose aim is to make sport and physical activity accessible to all Essex residents. It:

- provides up-to-date information on sports, activities, events and programmes available in and around the county;
- runs training courses for those who are seeking a more structured involvement in sport and physical activity, for example as a coach or referee;

<sup>7</sup> Sport Birmingham and Know Research (2016)

<sup>8</sup> (from 2017, this will become the Active Lives Survey)

- funds clubs, community sport initiatives and individuals through small grants;
- partners with other organisations and trusted third parties to increase the number and range of opportunities available; and
- advocates for improved and enhanced sport facilities, funding and engagement for the communities it serves.

#### **Essex Economic Commission**

4.27 The commission has undertaken a high-level SWOT analysis of the Essex economy and labour market highlighting several key trends of interest across the county.

4.28 The Essex Economic Commission has identified the following priorities for action in Essex, reflecting the overall key weaknesses and opportunities in the county:

- Raising Skills and Qualifications
- Developing opportunity sectors and technologies
- Improving Transport Infrastructure
- Expanding Availability of suitable workspace and premises
- Supporting coastal districts

4.29 Looking at the priorities themselves, Active Essex and the Sport sector have a role to play in contributing to these. We have outlined some opportunities that are relevant for the sport sector, and found that they correspond well to the key issues highlighted by the Essex Economic Commission.

#### **Priority 1: Raising Skills and Qualifications**

*Businesses in Greater Essex face skill shortages and have difficulties recruiting people with the appropriate skills. Also, the share of people in higher level occupations is below the UK average. The challenge is to raise skill levels in occupations and industries where they will be required. It will also be important to continue to build levels of educational achievement in schools and in further and higher education.*

4.30 Sport-related skills, including soft skills are often highly transferrable and play a role in the hiring practices of non-sport businesses. Sport leadership skills are recognised as important in developing management capabilities in individuals such as team building and people management. It is important to position the planned activities of Active Essex and partners to align with and contribute to these – by identifying higher value opportunities within sport, and understanding how sport skills can build leadership skills for high level roles in other sectors.

#### **Priority 2: Developing opportunity sectors and technologies**

*An ongoing focus will be required in developing sectors such as advanced manufacturing, low carbon and renewables, life sciences and healthcare, digital and creative, financial and business services, and logistics. Opportunities are also present in the exploitation of new technologies being developed in Greater Essex, including automotive engineering and advanced manufacturing.*

- 4.31 Sport is a key enabling sector here. Sport provision is associated positively with location factors which are attractive to modern sectors. Areas offering positive lifestyle opportunities are more likely to generate higher-end investment; and leadership and other skills currently being developed in sport can translate into better opportunities for employment in opportunity sectors, reducing skills gaps which hamper growth.

**Priority 3: Improving transport Infrastructure.**

*Key arterial road and rail routes are already under pressure, which will increase with rising population, expansion of housing in Greater Essex and expected growth of ports and logistics capacity, especially in South Essex. Investment that Improves efficiency of traffic and enhances connectivity is key. Core aspects of connectivity will be strategic access to international airports and sea ports; links between major towns and cities; and locally within towns to facilitate economic activity, the ability of people to get to work and links to new housing developments.*

- 4.32 While sport does not affect transport infrastructure directly – increased demand for physical activity can also begin to support sustainable transport agendas for example through increased walking and cycling. Four Essex districts are developing cycling pilots. The design of transport infrastructure and the physical built environment in general can have a large effect on behaviour and take-up of physical activity.

**Priority 4: Expanding availability of suitable workspace and commercial premises.**

*An inadequate supply of suitable commercial space for offices and factories is reported in many districts in Greater Essex. This is constraining opportunities to attract new business and facilitate the expansion of existing businesses. It may also discourage start ups. It will be important to review opportunities to expand commercial workspace, including new business parks, in order to increase the supply of suitable premises.*

- 4.33 Much of the infrastructure that supports the sport sector is already in place. In terms of premises and workspace that supports employment, expanding employment opportunities in the sports sector may require less investment due to the opportunity for quick wins by creating greater access to existing assets in schools for example in evenings and during weekends. Access to outdoor space and gym equipment may also perhaps require less development in terms of the physical built environment and can be addressed through softer planning and licensing measures.

**Priority 5: Supporting Coastal districts**

*Some coastal areas face particular challenges, for example, around lower educational and vocational attainment, high inactivity rate, more limited coverage of fast broadband and a larger presence of people in upper age groups. Specific measures to address the development of these areas need to be reviewed.*

The role of sport, and positive impact it has in developing entry-level skills for the labour market. Youth participation in extra-curricular sport can help build confidence and interpersonal (soft) skills. Sport has a key role to play as part of initiatives to address labour market exclusion in deprived areas. Provision of physical activities for older people can also impact on public health agendas and sport has a particular role to play in reducing health deprivation for the old and young, reducing longer-term direct costs in healthcare.



## 5 Sector Deals – scope for Sport?

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5.1 Partnerships between the government and industry on sector-specific issues can create significant opportunities to boost productivity, employment, innovation and skills.

5.2 The Govt says:

“We know that these partnerships can work – from our experience of decade-long partnerships such as the Auto Council and the Office for Life Sciences to more recent collaborations including tourism, creative industries, space and professional and business services.”

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5.3 The government is committed to extending these successful partnerships to other parts of the economy. A large number of industries have signalled their interest in developing a Sector Deal, and the government have been working with many of them in recent months.

5.4 The government will announce their intent to proceed with some further Sector Deal discussions in 2018.

5.5 Current and planned sector deals include:

- Life Sciences
- Automotive
- Construction
- Artificial Intelligence

5.6 There is therefore real opportunity for Sport as a sector to capitalise on the chance for a sector deal.

5.7 Some challenges exist however, as Sector deals are agreed at a national level and therefore individual areas and CSP's are not in a strong position to organise this pitch without some level of national co-ordination, for which Sport England would provide the most obvious body.

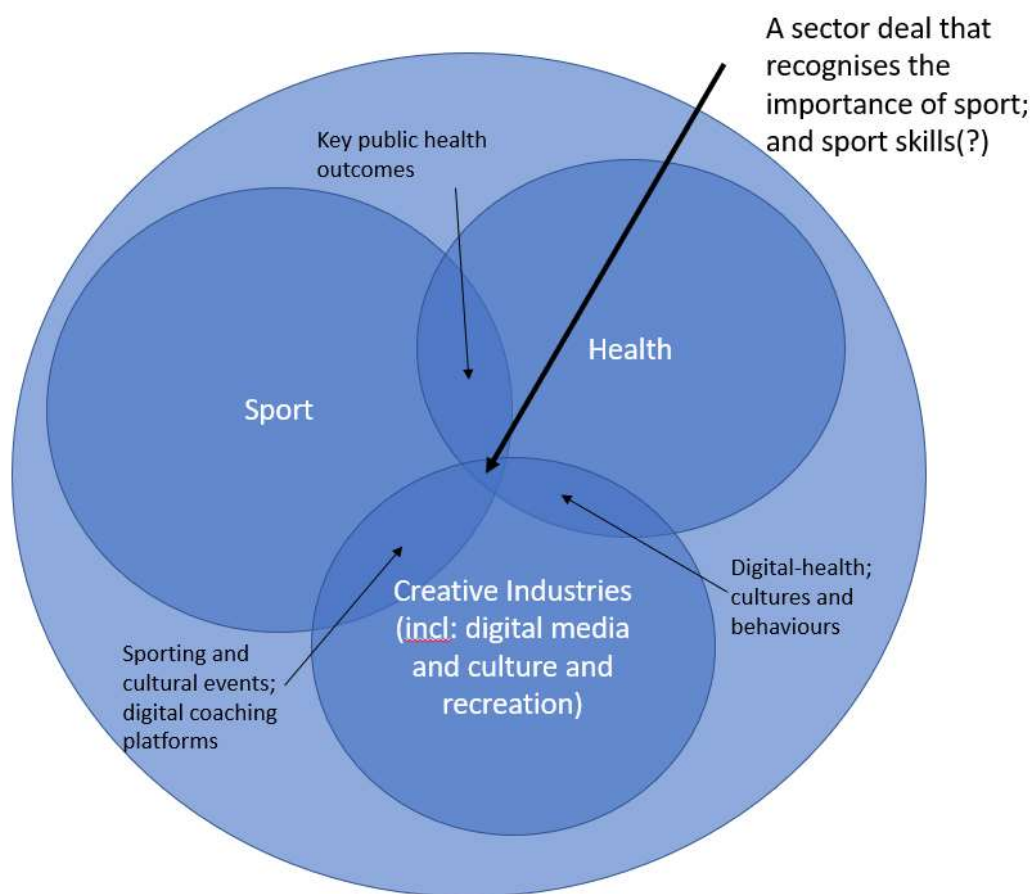
5.8 Notably, elements of the agreed sector deals have a strong focus on 'place', which is both a cross-cutting and over-arching theme in the Govt's recent Industrial Strategy. Some sector deals (similarly to 'catapult' initiatives) have identified local areas of excellence that warrant a national strategic focus.

5.9 Sector deals (so far) also tend to have a particular productivity and value-added focus in terms of their objectives.

### **The SELEP skills strategy - Sport not featured, but there are strong 'priority sector' links**

5.10 Across Essex and the South East LEP skills and economy priorities have been highlighted in terms of specific opportunities in emergent growth sectors.

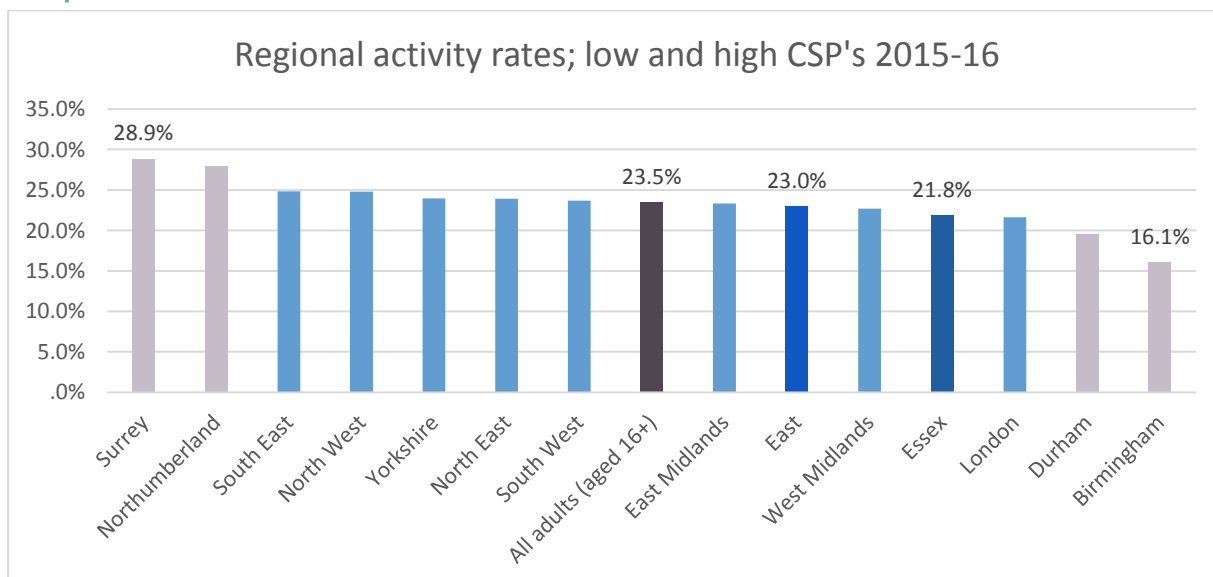
- 5.11 The South East LEP is also in the process of commissioning skills work – and this represents a further opportunity to recognise sport skills as integral to developing both cultural and health sectors. The most recent skills strategy features Health and Creative Industries as priority sectors.
- 5.12 Sport could be considered as increasingly important in terms of securing and protecting a much wider range of visitor and leisure tourism jobs (some of which feature in the above table).
- 5.13 Sport needs to be promoted as a strategic sector. It is both a growth sector but also supports cultural and visitor outcomes, and is recognised as increasingly important to delivering health outcomes. Due to the way this cross-cuts priority sectors, there appears to be scope for sport to form part of any sector deal approach to either health or the creative industries. This may be appropriate for the Greater Essex federated area, or for SELEP as a whole.
- 5.14 Our headline recommendations highlight an increasing role for ‘digital sport skills’ approaches moving forwards; an agenda which is also being advocated for the health sector. The following diagram is a high-level characterisation of these types of overlaps:



## 6 The Active Lives Survey 2015-16 results

- 6.1 The introduction of the Active Lives Survey in 2015-16 has replaced the 'Active People Survey' run previously by Sport England. As it uses a new methodology, the results are not directly comparable between the two. The 2015-16 results from the active Lives Survey will therefore be the new baseline from which progress and change can be measured.
- 6.2 A summary report can be seen here: <https://www.sportengland.org/media/11498/active-lives-survey-yr-1-report.pdf>
- 6.3 The following section locates Essex CSP within the national, regional and comparative CSP results from the new Active Lives survey.
- 6.4 The metrics produced by the new survey can be segmented down to the local area level, making it possible to look at rates of activity in Essex CSP (both as a whole, and by individual district or unitary authority). These can be compared with the national rates to look at where the area is above or below average, helping to target future additional activity.
- 6.5 There are global [all 16+ respondents in England] results that can be analysed in terms of demographic characteristics, but these characteristics are not available within small areas due to sample sizes and error margins<sup>9</sup>.

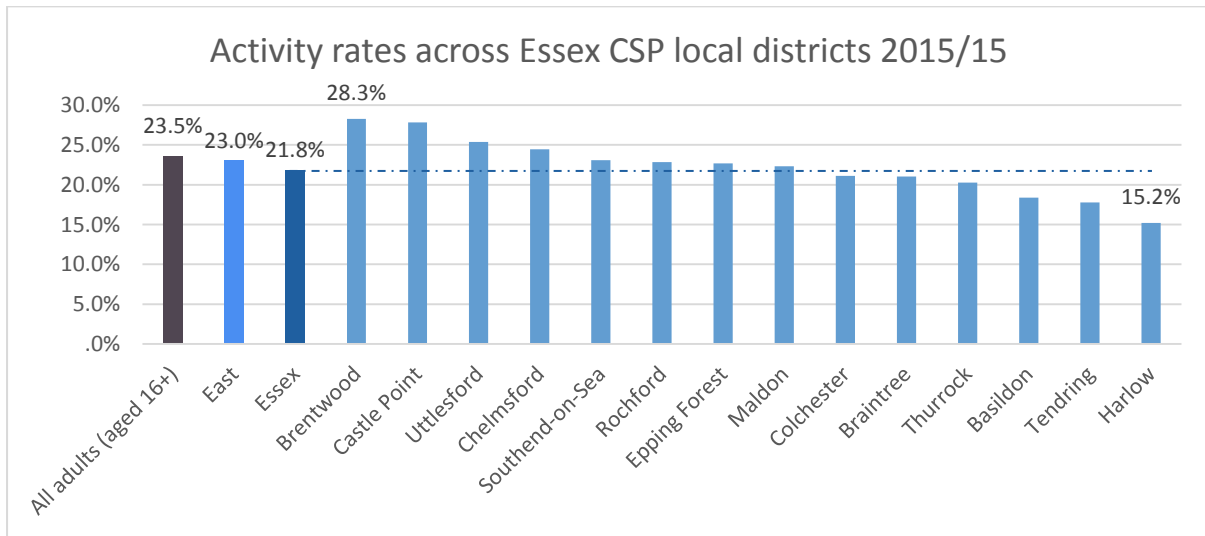
### Comparative area results



- 6.6 There is not an immediately clear pattern in the chart above. Surrey and Northumberland are not very similar areas, nor are Durham and Birmingham.
- 6.7 There is a clearer bias when considering the urban characteristics of locations: London is the worst performing region. As the nation's second city, Birmingham is also the worst performing CSP. Durham is an urban centre within it's county, Northumberland is a particularly rural county.

<sup>9</sup> It is however possible to approach this element using local base populations. For example

6.8 The urban or rural characteristics appear to have a large effect, though it is not clear whether this is independent of other demographic characteristics – though Harlow, coastal Tendring, Basildon and Thurrock do contain higher concentrations of deprivation<sup>10</sup>.



6.9 Within Essex, activity rates reflect the same level of diversity (almost) as within the regions and individual CSP’s. Essex also has a mix of more rural and more urban districts, though the pattern of rural/urban highs and lows is not as clear. (For example, Harlow is far from ‘urban’ despite bordering London, and Tendring is perhaps the least urban part of the CSP.

6.10 Within smaller areas it is more likely that the characteristics within a random population sample can influence results. While these are not reported within smaller CSP and district areas the national results highlight a number of clear demographic ‘drivers’ of activity.

## Understanding [demographic] drivers of activity rates in the new survey data

6.11 The below results represent the national sample of the Active Lives Survey. Demographic results are not available for individual LA or UA areas in Essex, though offer useful insight into the factors that may be influencing activity rates for areas with identified low rates.

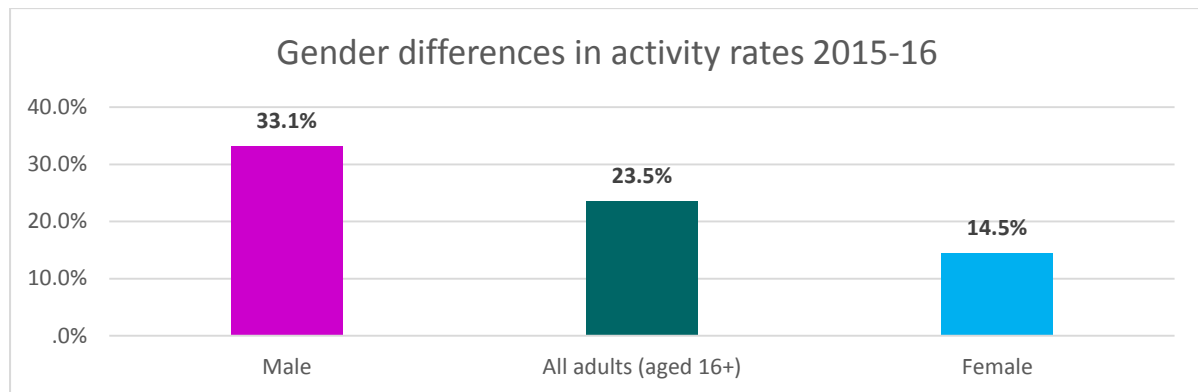
### Gender

6.12 Strikingly, men are more than twice as active as women in the national data (33.1% compared to 14.5%). National campaigns such as [This Girl Can](#) have identified this and launched targeted interventions to support raising activity levels for women.

6.13 As the proportions of men and women do not vary significantly between areas within Essex this is unlikely to explain much, if any, of the variation in activity rates. Tendring and Harlow do however have marginally higher numbers of 16+ women than other Essex areas. Brentwood and Castle Point,

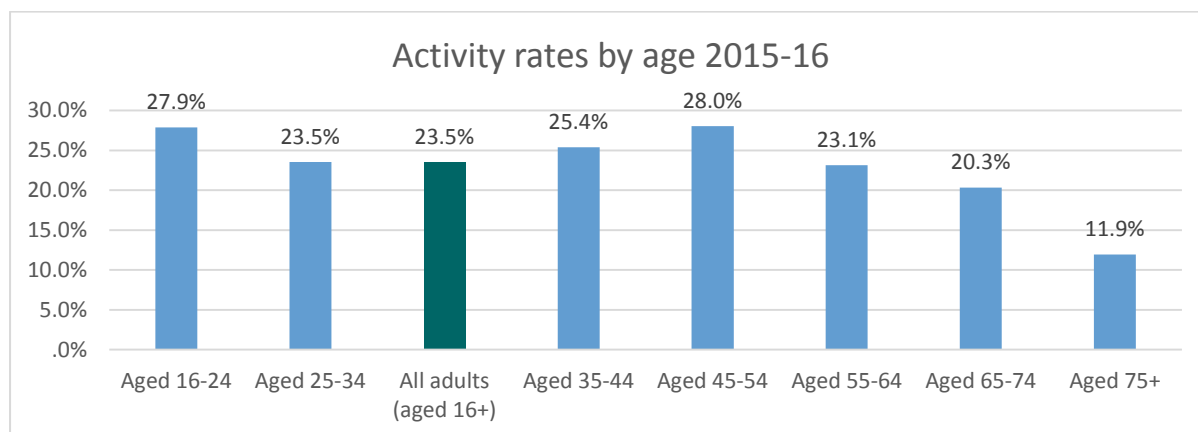
<sup>10</sup> <http://dclgapps.communities.gov.uk/imd/idmap.html> - Tendring contains the most deprived LSOA in the country, ranking 1 of 32,844. Harlow and Tendring also have poor health and income IMD correlates; whereas for Basildon and Thurrock low skills and education levels, and higher levels of child-deprivation.

however, also have higher than average proportions of 16+ women within Essex, while Chelmsford and Colchester have the lowest proportions of women.



### Age

6.14 The age of people who take part in regular activity highlights a subtler pattern: activity rates decline for young adults 16-35 yrs, and then rise again.

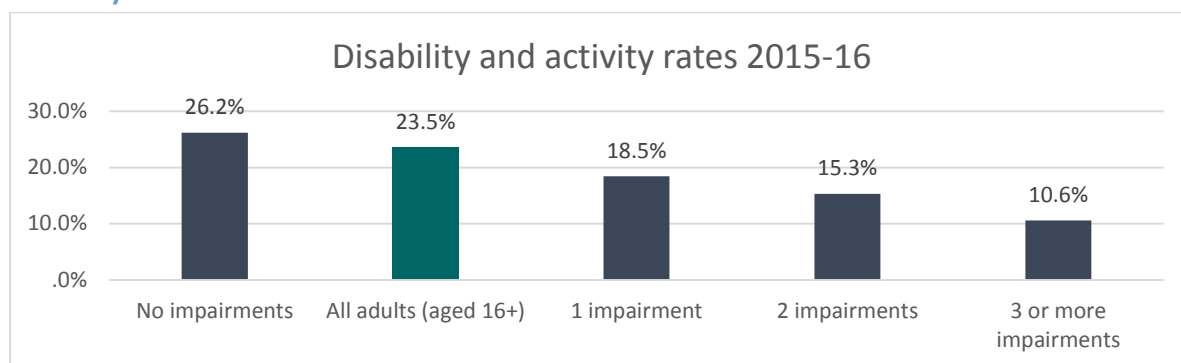


6.15 Several factors influence this: **i)** people in this age range tend to be more affluent than those aged 16-34; **ii)** beyond a certain age (55+) people are more likely to have or develop one or more 'impairments' to activity and **iii)** people in the 25-44 age range are also more likely to be parents of young children<sup>11</sup>.

6.16 We can therefore see that several factors both positively and negatively influencing activity rates have different patterns of influence depending on age and gender.

<sup>11</sup> This factor is relatively more significant in terms of the effect on women's activity rates. Sport England note: "Women, in particular mothers, feel bad about being away from their family and spending time on themselves. It is revealing that (busy) working women are more active."  
[https://www.sportengland.org/media/10083/insight\\_go-where-women-are.pdf](https://www.sportengland.org/media/10083/insight_go-where-women-are.pdf)

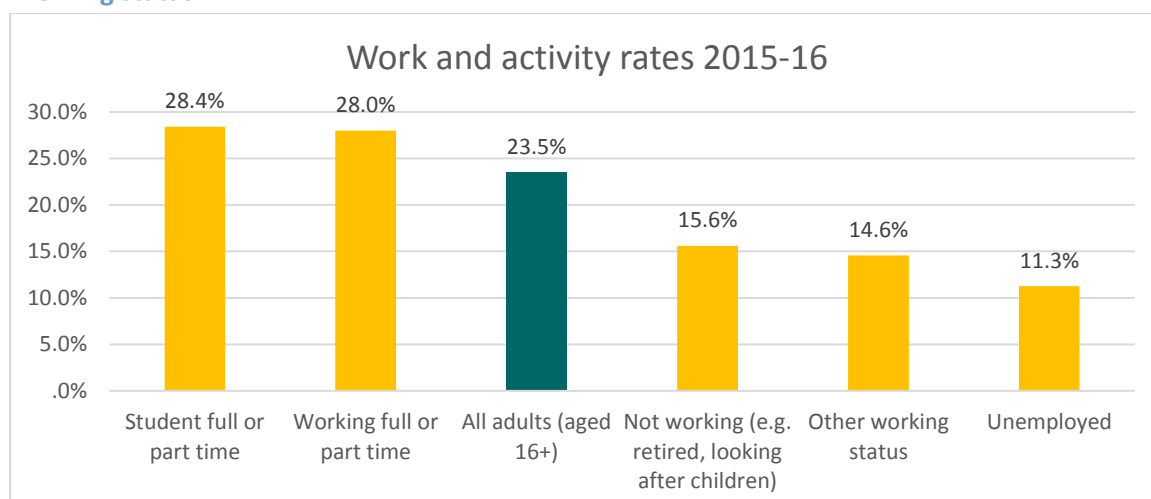
## Disability



6.17 People with no impairments are the most likely to take part in regular physical activity, although nearly three quarters of this group are still not regularly active.

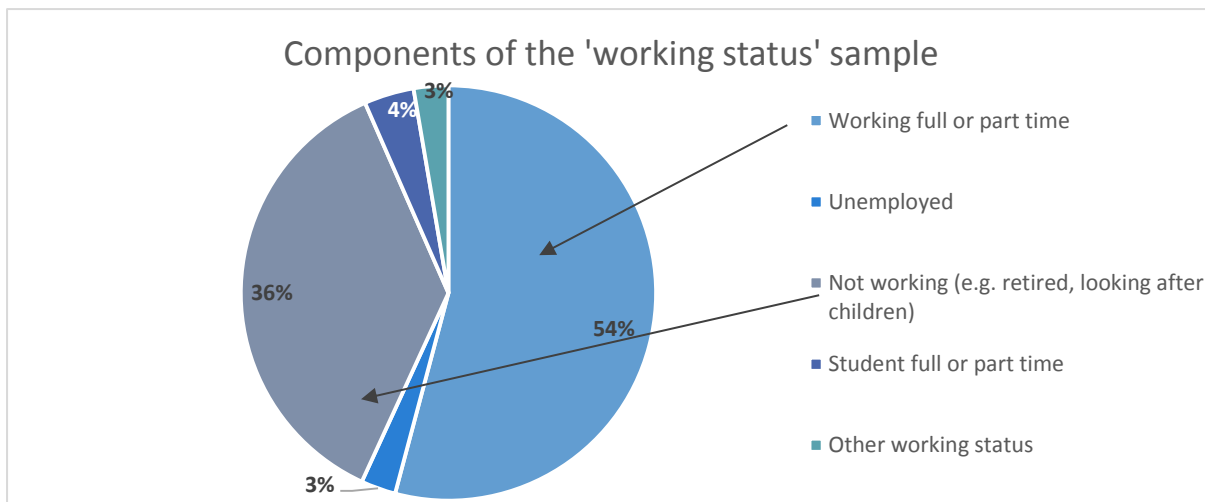
6.18 Disabilities and impairment clearly present significant barriers to people taking part in regular activity, but it is notable that one-in-ten people with three or more impairments still do participate in regular activity. Given that 75% of people with no impairments are inactive, only  $[1.5 / 9]$  17% of the overall rate of inactivity (for the three or more impairments group) would be explained by this.

## Working status



6.19 The above result suggests that 'affluence' (ie disposable household income) is a strong driver of higher activity rates. For students, however, lower 'income' but greater amounts of leisure time confer the highest activity rates.

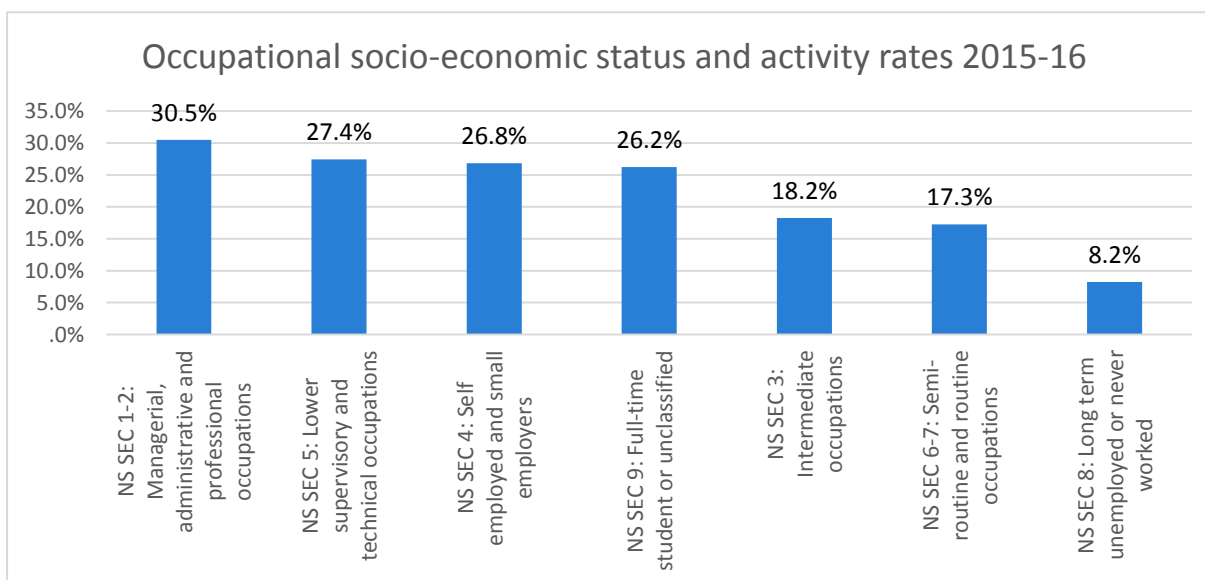
6.20 The largest single group by cohort size are those working full or part-time – however the next largest group are those 'not working'. These two groups have the highest proportionate 'effect' on overall activity rates.



6.21 The significant size of the 'not working' group in the national sample highlights that this group, though it does not have the lowest activity rate, does have the largest proportionate effect on lowering the average. This 'not working' group therefore represents a potential target for interventions, in particular, ones that may provide more inclusive paths for two key groups: mothers with children; and an older inactive demographic that may also be likely to experience some level of impairment or disability.

#### Socioeconomic status

6.22 The following data shows the variance in activity rates that is associated with people's occupational status, showing the large amount of variance within the 'working full or part-time' group.



6.23 Three occupational types, and 'students' have higher than average activity rates:

- Managers and professionals
- Mid-level supervisory and technical
- Self-employed and small employers

- Students

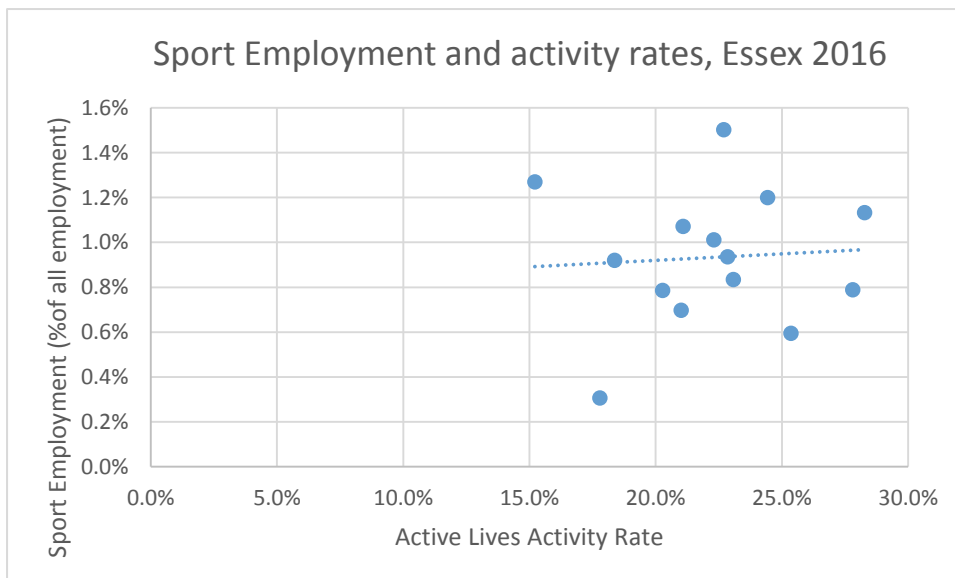
6.24 Following these four groups, the last three of which have only small differences, there is a sharp fall for the next two occupational groups:

- Intermediate occupations
- Manual / semi-routine and elementary

6.25 The long-term unemployed and 'never worked' have the lowest activity rate (8.2%), below that of those who are simply unemployed (11.3%).

### Local analysis

6.26 We have looked at several factors that can further help understand what is driving different activity rates in Essex. The variance in activity rates is not well explained by the different levels of employment in sport between districts, but we find that several variables can illuminate what is driving some of the differences.



6.27 The scatterplot above shows that higher levels of sport employment are not strongly associated with higher levels of activity, although there is a small positive effect. By looking at the types of factors that are more strongly associated with higher activity rates we can understand more about why this may be.

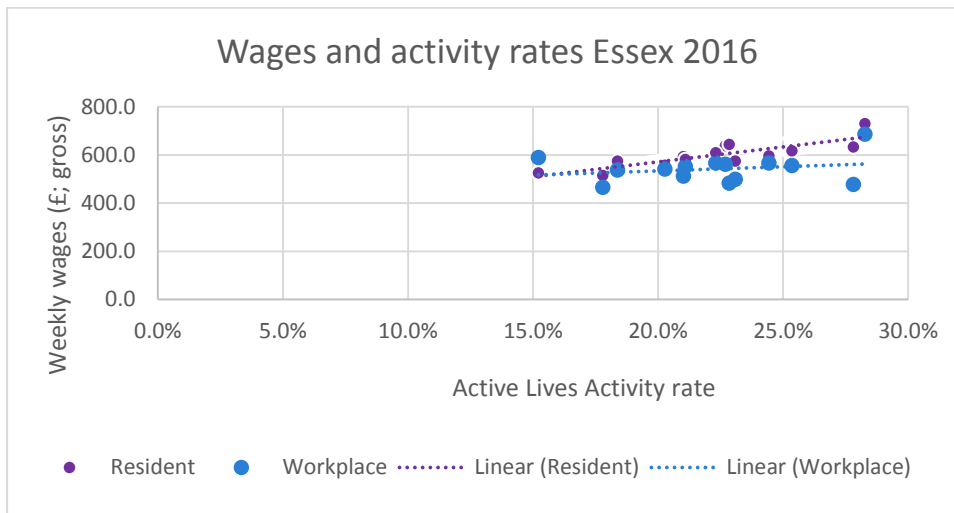
6.28 Thinking about the demographic factors outlined in the previous section, we have looked at three primary factors that represent a 'cost' in terms of participating – these are:

- The financial cost of participation
- The time cost of participation
- The effective 'distance' cost of participation, ie ease of access



### Relative financial cost:

- 6.29 We find a more significant relationship between wage levels and activity rates. In particular, the wage levels of residents are a more significant factor than the wages paid in local businesses in terms of activity rates. This suggests strongly that activity rates are likely to be higher, or highest for those top earners, and that these people are also more likely to be out-commuters.

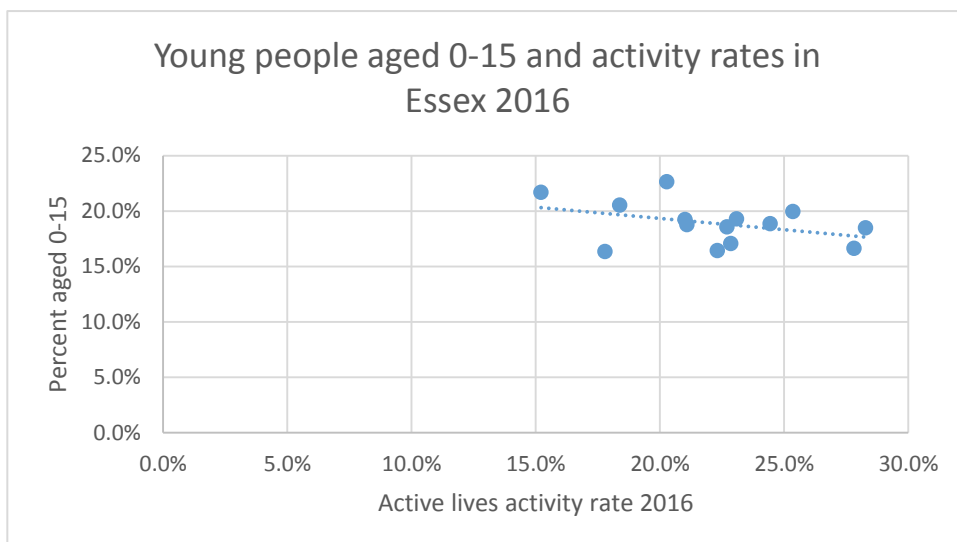


- 6.30 The difference in the results tells us that there is a specific demographic of higher-earning commuters that correspond closely to the national characteristics that determine high rates of activity. In part, this may relate to the propensity for mixed-modal commutes such as cycling to a train station having a positive impact, alongside higher propensities for gym membership and sport participation.
- 6.31 Importantly this highlights that it is likely to be just as much about behaviours as the actual £ cost of activities, but that these behaviours (eg multi-modal cycle commuting) do tend to be associated with high earners.
- 6.32 Factors such as promoted bike finance schemes<sup>12</sup> - in combination with improved walkability and bikeability commuter routes - could be appropriate in addressing the reasons behind some differences in activity rates.

### Time Cost

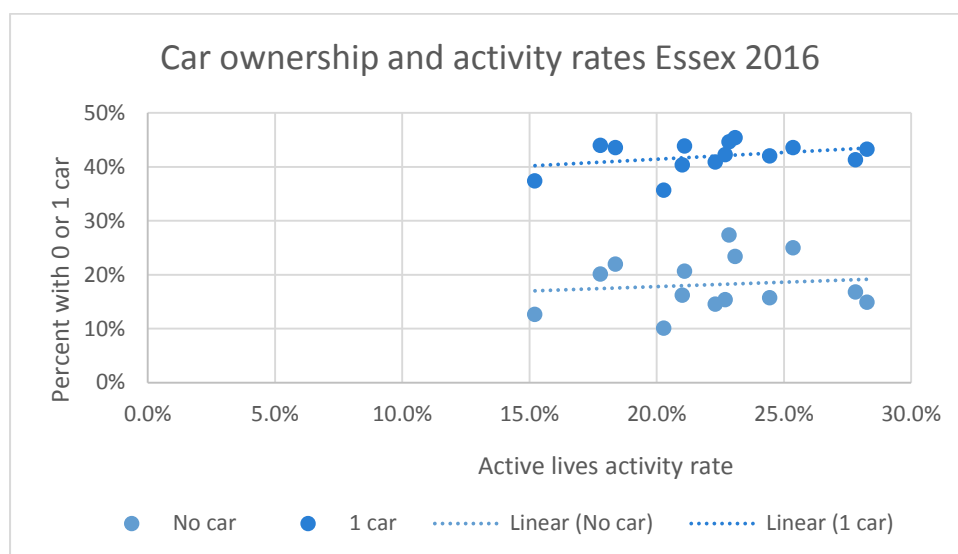
- 6.33 The demographic data used by active lives highlights that age is a significant factor affecting activity rates. Looking at the rates across Essex, we do find that higher proportions of people over 65 years as a percentage of the population has a negative effect on activity rates.
- 6.34 We have found, looking at the 14 Essex districts, that while rates of retirees are a significant predictor, that the proportions of young people aged 0-15 in an area is nearly twice as significant. As the activity rates of 0-15 year olds is not measured in active lives data, this does not necessarily relate to inactivity of young people – but rather that adults in areas with higher numbers of children have additional constraints on their time

<sup>12</sup> These tend to also be more prevalent in larger businesses, often in higher paying sectors.



### Effective distance

- 6.35 Whether a household has access to a car has also highlighted an interesting pattern: not having a car is associated with marginally higher than average activity rates. Having 1 car is associated with significantly higher activity rates; but for households with 2, 3 or four or more cars activity rates are on average lower (and by a higher amount the more cars are introduced).
- 6.36 This tells us that there is a relatively small group for which not having a car is associated with higher levels of activity, and this is likely to be driven by active commuting behaviours of this group.
- 6.37 The more significant effect however, appears to be in how cars create access to sports and physical activity infrastructure for residents: having a car reduces the effective distance faced by people, increasing access.
- 6.38 This is an interesting finding because the relationship is not a simple or linear one: for people with no car that have active commutes, the effective *distance to activity* is nil: physical activity is integrated into their routine. For groups that do not have active commutes, including those not working, access to a car in the household reduces the 'distance' to sport activities.



# 7 The Sport Sector Economic Baseline

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## **Sport in Greater Essex: update on the initial baseline from the latest data**

7.1 The following section will build on and update the 2016 sector profile (updating 2015/16 data with 2016/17 results). As noted this section focusses on 'core' sports sectors, (see table opposite) that do not include health and education sectors profiled later in the chapter.

### **Key analysis of 2015-16 employment growth and 2016-17 business growth<sup>13</sup>:**

7.2 There is a striking difference between the more recent performance of employment growth and business formation across Greater Essex. While employment growth has been very positive (+24.5%) business base growth (-1.3%) has not.

7.3 This recent dynamic in fact reverses a trend seen in the period 2010 to 2015: where business dynamism and positive 'churn'<sup>14</sup> in the market was occurring, but alongside relatively stagnant or negative employment growth.

7.4 Our previous analysis also showed that 'other human health' activities had displayed significant growth, while 'sport and cultural education' had seen significant decline. Changes to employment in core sport sectors in the period were much more marginal, and we had therefore identified that market demand for sport & physical activity skills in the 2010-2015/16 period was stemming strongly from changes to local health delivery strategies.

7.5 In the more recent data analysed, we have seen this pattern between demand for sport skills in education and health sectors reverse, with falls in health and growth in sport education roles. The previous trend the research highlighted has not sustained, but core sport sectors, which had lost -240 employees 2010-2015, have added 2,840 employees in the single year period to 2016.

7.6 Our current update, rather than repeat analysis done previously, focusses specifically on 'core' sport sectors<sup>15</sup> to understand how growth in these sectors in the recent period has underpinned changing provision and deployment of business assets, and skills demand in core sport sectors.

7.7 So as the previous analysis looked at the growth of demand for sport skills in health sectors and drew links between inactivity and public health agendas, this analysis will focus on mapping changes in core sport provision in advance of new 'Active Lives' data released in March. Any improvement (or not) in activity levels can then be linked to changes in the sport businesses and skills deployed across Essex Districts, including the two UA's of Southend-on-sea and Thurrock.

This research update therefore seeks to provide an updated profile of **i)** activity levels within areas, and an analysis of what may be driving driving them, in terms of the recent active lives round 1

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<sup>13</sup> Employment data is lagged by an additional year relative to business data which is more current. All figures are current at time of publication.

<sup>14</sup> A process of creative destruction, where business births exceed business failures

<sup>15</sup> These are: Manufacture of sports goods [SIC 32.3]; Retail sale of sports goods [SIC 47.64]; Sports activities [SIC 93.1] incl. operation of facilities, sports clubs, fitness facilities and 'other' activities.

survey data (see previous section) **ii**) changes to provision in terms of sport skills and businesses highlighted in the recent data - which are presented below.

### Employment Performance of 14 Essex LA & UA areas

- 7.8 The greater Essex area has seen strong growth in most districts in the most recent employment data.
- 7.9 Employment growth has not been even though – Southend added a seven times greater number of jobs than either Harlow or Castle Point in the period; Braintree added six times the number.
- 7.10 The 2,840 sport jobs created in the period represent 14.95% of all employment growth across Essex in the period, though the sub-sectors included in the table below had only a 1.7% share of all jobs in 2015.

<b>Sport: employment change 2015 to 2016</b>			
Area	2016	15-16 growth	Percent growth
Basildon	1,340	265	24%
Braintree	850	315	43%
Brentwood	705	205	37%
Castle Point	590	50	11%
Chelmsford	1,695	200	14%
Colchester	1,625	280	18%
Epping Forest	1,595	265	21%
Harlow	855	50	7%
Maldon	535	220	47%
Rochford	665	180	28%
Southend	1,210	345	32%
Tendring	365	100	27%
Thurrock	1,015	135	15%
Uttlesford	410	230	61%
<b>Greater Essex</b>	<b>14,570</b>	<b>2,840</b>	<b>24%</b>
SELEP	30,675	4,775	18%
England	396,750	31,750	9%

The three areas with the highest levels of employment all grew at a rate slightly below the average rate of percentage growth, and the two highest percentage growth locations (Maldon and Uttlesford) began from a low base.

We can see some level of convergence happening, with some areas with low bases of sport employment ‘catching-up’. While this is the general trend shown in the table, not all areas are converging towards higher

Castle Point, Harlow and to some extent Tendring do not appear to be converging in the same way in the period.

These areas have very low activity rates as shown in the latest Active Lives data, and there may be interacting elements of a lack of existing demand at scale in

these areas, compounded by a lack of provision which we can infer from the low levels of sport employment.

## Performance across 6 key sport sectors

Sector	3230 : Manufacture of sports goods	4764 : Retail sale of sporting equipment in specialised stores	9311 : Operation of sports facilities	9312 : Activities of sport clubs	9313 : Fitness facilities	9319 : Other sports activities
<b>2016 total</b>	460	2,780	4,365	4,795	1,685	485
<b>2015-16 change</b>	-10	160	1,125	1,120	280	165
<b>Percent change</b>	-2%	6%	35%	30%	20%	52%

7.15 Two sectors – the operation of sports facilities, and the activities of sports clubs – have added the bulk of new jobs in the period (2,245 of 2840). Fitness facilities have also displayed strong growth.

7.16 Sports manufacturing is the only sector to have shrunk, albeit marginally. Other Sports activities have displayed the highest proportionate growth, and interestingly it is in this sector that we find sport event promoters and more emergent ‘sport freelancers’ operating outside of traditional sport infrastructure.

## Business

Sport: Business base changes 2016 to 2017 <sup>17</sup>			
Area	2017	16-17 growth	Percent Growth
Basildon	100	0	0.0%
Braintree	95	-5	-5.0%
Brentwood	65	0	0.0%
Castle Point	40	0	0.0%
Chelmsford	135	5	3.8%
Colchester	90	-5	-5.3%
Epping Forest	120	-5	-4.0%
Maldon	50	0	0.0%
Rochford	50	0	0.0%
Southend-on-Sea	80	0	0.0%
Tendring	50	5	11.1%
Thurrock	55	5	10.0%
Uttlesford	55	0	0.0%
Harlow	30	-15	-33.3%
<b>Greater Essex</b>	<b>1,025</b>	<b>-5</b>	<b>-0.5%</b>
<b>SELEP</b>	<b>2,310</b>	<b>30</b>	<b>1.3%</b>
<b>England</b>	<b>31,260</b>	<b>405</b>	<b>1.3%</b>

The picture for business formation within the latest data is more muted than the picture for employment in terms of recent growth. Overall, the business base has seen a very marginal decline of -5 establishments 2016-17.

Within the loss of 5 businesses, there has been a decline of 5 businesses in ‘retail sale of sporting goods’, and a further 5 ‘operation of sports facilities’ establishments. The ‘Fitness facilities’ sector has offset this slightly with of 5 new establishments.

Small positive and negative changes to the business base have been occurring across the 12 districts and two unitary authorities in Greater Essex. Harlow is the location which has seen the most dramatic negative change in business numbers, and this may be of concern as Harlow has both the lowest activity rate in the latest active lives data, but also the smallest business base of any Essex area in 2017<sup>16</sup>.

<sup>16</sup> Having begun the period with 45, Harlow has lost 15 to end the period with 30 businesses. Castle Point, with the lowest number in 2016 (40 businesses) did not lose any in the period.

- 7.20 Contrasted against SELEP and England, the recent business performance is poor, but should be contrasted against a period of strong business formation in sport 2010 to 2016, where Sport sectors had added 100 businesses.
- 7.21 Taken together with the employment growth result a sensible conclusion is that recent growth and reconfiguration of the business base in the period 2010 to 2016 has resulted in the ability to expand employment demand significantly over 2016.
- 7.22 The following table displays the most recent changes to the business base by sector.

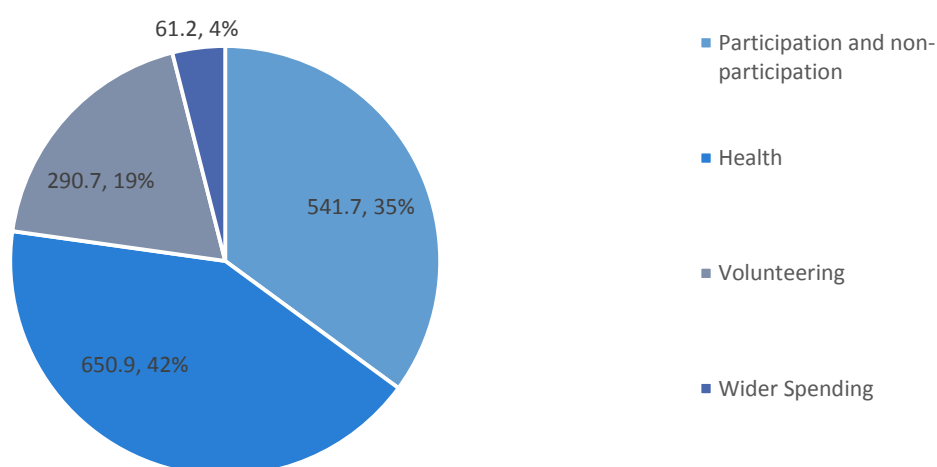
Sector	3230 : Manufacture of sports goods	4764 : Retail sale of sporting equipment in specialised stores	9311 : Operation of sports facilities	9312 : Activities of sport clubs	9313 : Fitness facilities	9319 : Other sports activities
2017 total	35	240	190	265	130	165
2016-2017 growth	0	-5	-5	0	5	0
Percent growth	0.0%	-2.1%	-2.6%	0.0%	3.8%	0.0%

## The Greater Essex Sport profile (full 2015/16 analysis)

### GVA

- 7.23 Sport England model the economic impact of sports across various geographies, mapping the specific channels of impact that sport can add value through, using their 'Economic Value of Sport'<sup>17</sup> model. (see appendix II for Essex CSP results).
- 7.24 The Sport England model is not directly comparable to our sector model as it also includes value from sports retail and sports gambling, but does allow us to look at the contribution to GVA from the Sport Sector. The model uses 2013 data on the sector and so this has been compared with 2013 GVA. The model is also regularly updated, and so any subsequent versions can also be compared with more recent GVA to track progress moving forwards.

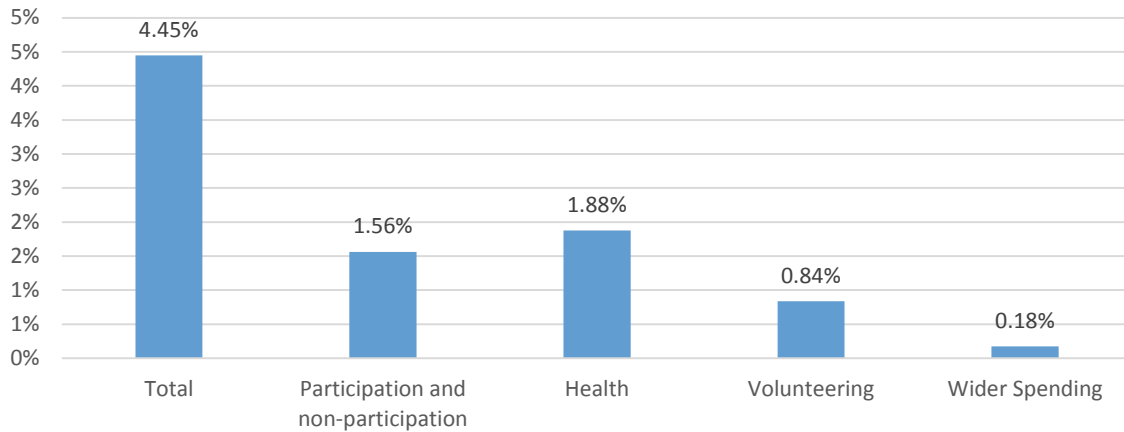
Components of Sport GVA In Essex CSP 2013 (£mns; %)



<sup>17</sup> <https://www.sportengland.org/research/benefits-of-sport/economic-value-of-sport/>

7.25 The total 2013 contribution to GVA from Sports in Essex CSP was £1,544.5m (Over £1.5bn). It is of note that the total contribution in terms of value is greatest from the health component.

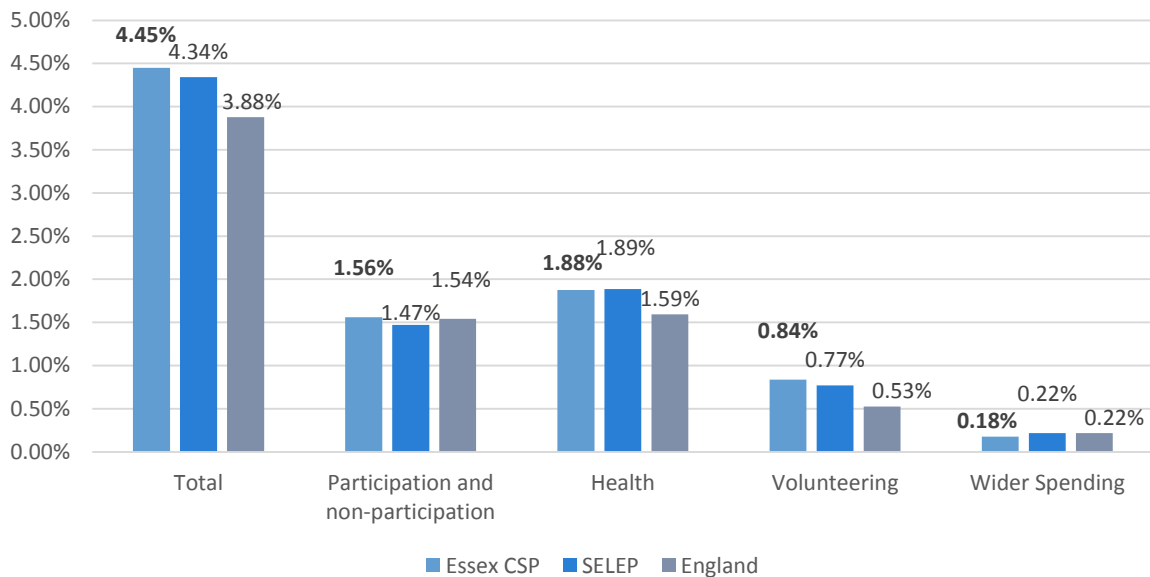
Components of Sport GVA in Essex CSP - contribution to total GVA of Greater Essex



7.26 Looking at how this compares to other areas, sport in Essex CSP is making a greater contribution to total area GVA from than either SELEP or England.

7.27 The total contributed GVA proportion from sport of 4.45% in the next graphic shows sport is a more significant economic driver in Essex CSP than SELEP where sport comprises 4.34% of GVA or England where sport comprises just 3.88% of GVA.

Comparative contribution to GVA from the Sport Economy: Essex CSP, SELEP, England



7.28 Two observations can be made about Essex CSP's higher GVA contribution from Sport:

- 7.29 Firstly, the Essex CSP area (equivalent to Greater Essex) has a lower GVA per-head than England, and therefore an equivalent proportion of sport would naturally represent a higher share of value.
- 7.30 Secondly, however – Essex CSP has a slightly higher GVA per head average than the SELEP average, and therefore without a higher rate of sporting activity delivered per-head in Essex CSP, would have made a lower contribution proportionately to GVA. So, while some of the difference with England in terms of GVA share can be explained by England’s higher GVA per-head, it also appears to be delivering greater levels of sport and activity in the area than the LEP average<sup>18</sup>.
- 7.31 In particular, compared to SELEP, Essex CSP has higher rates of participation and volunteering which contribute to the higher share of GVA seen in the area. Compared to England, Essex CSP has comparable proportions of GVA from participation and (non-participation) direct spending on sport. England however has a much lower share of GVA from volunteering at just 63% of the level of share seen in Essex CSP.
- 7.32 Wider Spending in Essex CSP is lower than across SELEP or England, and though it is the least significant element of Sport GVA there may be scope to look at how other services are co-located around sporting events, and whether there is scope for Essex to improve its capture of spending.
- 7.33 Overall, the proportionate contribution in terms of GVA is over 14% higher in Essex CSP than in England. If the England percentage were equivalent to the SELEP percentage contribution to GVA (4.45% compared to 3.88% currently) then it would be 14.69%, or £7,538.44m (>£7.5bn) higher. The primary channel through which England would need to close this gap would be in terms of volunteering and health impacts which are measures that Essex CSP is ahead of the game in delivering currently.
- 7.34 It is also these two areas of Health and Volunteering that literature suggests contribute most to the wider economy in terms of impacts on workplace wellbeing, absenteeism; and, skills, teamwork and leadership development respectively.

Essex CSP is therefore in an advantageous position in terms of its ‘reach’ on the ground and engagement of volunteers, with value being generated from areas of the sport economy most likely to generate positive impacts on other sectors and generate social value and underpin public health outcomes for the area.

### Business

- 7.35 The following sections on business and employment use a slightly different comparison which focusses in on the three specific industry sectors selected because of their use of sport skills. To recap, these are:

- 85.5: Sports and recreation education; **and** Cultural Education<sup>19</sup>
- 86.9: Other human health activities

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<sup>18</sup> The SE LEP are also encompasses Kent Sport CSP and the part of Sussex CSP in East Sussex.

<sup>19</sup> Taken as one sector to enable occupational analysis. Approximately 2/3 of total employment is in Sport education rather than Cultural education, and culture also includes ‘dancers and choreographers’. ‘Cultures of sport’ are also important for e.g.: community youth workers, which have been included.



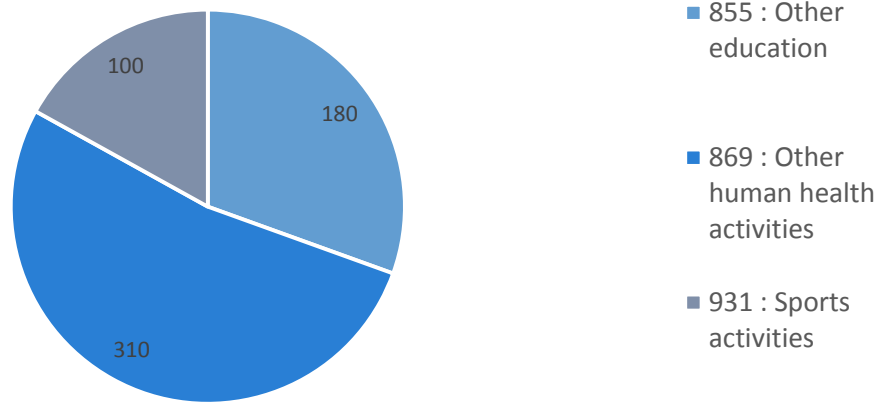
- 93.1: Sports activities

- 7.36 We have used ONS industry classifications to track change and growth in sports sectors across Essex CSP between 2010 and 2016 for businesses, and 2010 to 2015 for employees (latest data). Importantly, growth in the business base can represent potential for future growth in employee demand, but this needs to be understood in the context of what we know about shifts in the wider funding structures surrounding sport education, public health and physical activity agendas and the balance between private sector and community sport provision.
- 7.37 Between 2010 and 2016 the sport business base of Essex CSP has grown from 1,690 businesses to 2,280 - or by 590 businesses (+34.9%). This has been significantly faster than the overall growth in the business base (+16.2%) and the sector has therefore increased share.
- 7.38 Table X shows the total number of sport businesses in each area of Essex CSP, the share of all businesses this represents, the growth since 2010, and the percentage growth on 2010. Overall the table is ranked in order of the percentage growth since 2010.
- 7.39 The two areas with the highest growth – Thurrock and Southend – also happen to be the two unitary authorities of the CSP. As unitaries have particular discretion over Public Health budgets it is important to understand whether there may be a link between this and the particularly high growth.
- 7.40 As it turns out, in both Southend and Thurrock it is the health element of sport provision which has driven growth most strongly, with a growth rate of exactly 100% in both cases – significantly higher than the 34.9% overall expansion of the sector and the 16.2% overall growth in the business base of Essex CSP for the period.

Area	Sport businesses 2016	Sport business as a % of all businesses 2016	Sport business growth by area since 2010	Sport business % growth on 2010
Thurrock	175	2.5%	80	84.2%
Southend-on-Sea	245	3.2%	90	58.1%
Uttlesford	165	2.9%	55	50.0%
Basildon	225	2.8%	70	45.2%
Epping Forest	225	2.8%	70	45.2%
Colchester	235	2.9%	70	42.4%
Harlow	105	3.2%	30	40.0%
Braintree	190	2.5%	40	26.7%
Chelmsford	245	2.8%	50	25.6%
Castle Point	75	2.1%	15	25.0%
Brentwood	125	2.7%	20	19.0%
Rochford	95	2.5%	15	18.8%
Tendring	120	2.4%	10	9.1%
Maldon	80	2.3%	5	6.7%
<b>Essex CSP total</b>	<b>2,280</b>	<b>2.7%</b>	<b>590</b>	<b>34.9%</b>

7.41 Overall across Essex CSP the total growth of 590 businesses can be split between the three sectors to show the contribution of each to total sport sector growth.

Sport sub-sector contribution to sport growth in Active Essex CSP 2010 - 2016



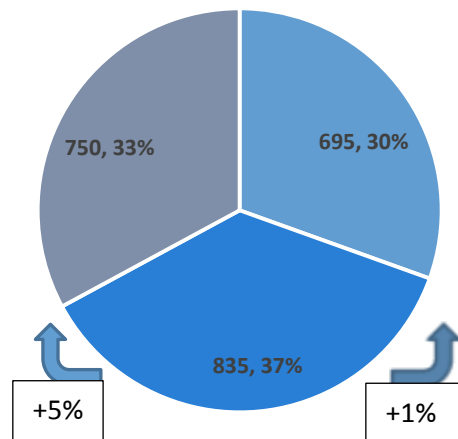
7.42 As we can see, 'other human health activities' have contributed the largest total number of net new businesses (310). This represents growth of 59% on the 2010 total, and 53% of all growth seen in the sector.

7.43 Other education contributed 180 businesses, representing 35% growth on the 2010 base, and 30% of the sector growth during the period.

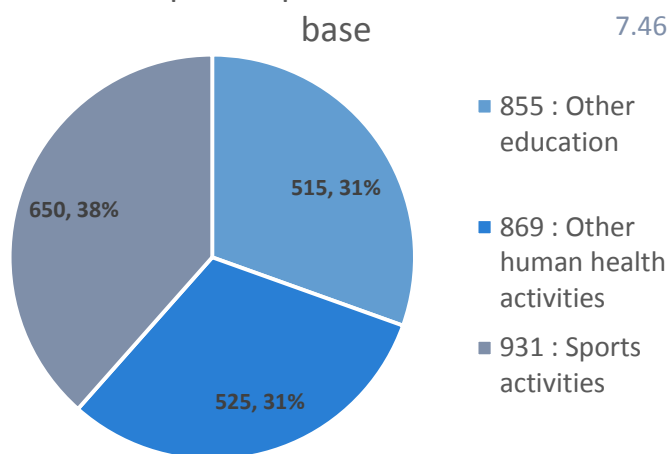
7.44 Sports activities has contributed 180 new businesses across the CSP since 2010, representing 15.4% growth on the 2010 base, and 17% of the sector growth during the period.

7.45 The overall balance of growth therefore means that Sport education has lost marginal share (-1%), but health related sport activity (other human health activities) has increased share within the sector and sport activities has lost a non-marginal share (-5%), as shown directly below.

2016 split of sports sector business base

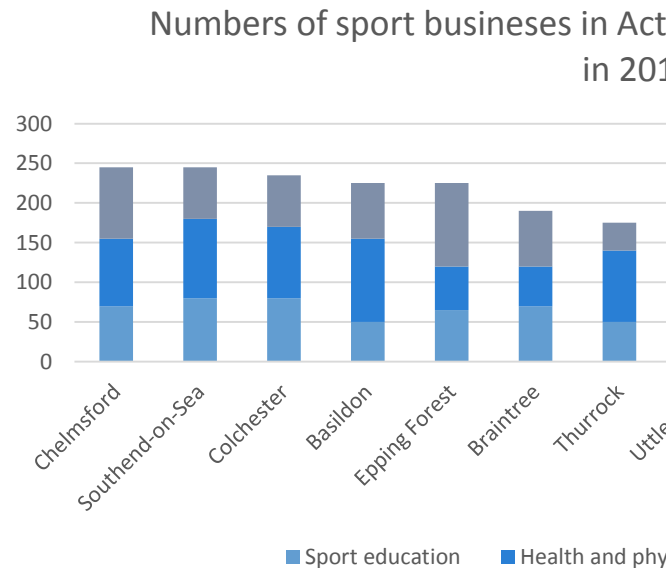


## 2010 split of sports sector business base



7.46

Profiles of the split between the three sub-sectors in 2016 can be seen for each of the Active Essex areas below.



### Employment

- 7.47 Between 2010 and 2015 the sport employment base of Essex CSP has marginally declined by -306 people from 21,707 to 21,409, or -1.4%. Over the same period employment in the area has expanded by 43,484 people (+6.8%).
- 7.48 Table XX shows the total sport employment for each area of Essex CSP, the growth between 2010 and 2015, percentage growth between 2010 and 2015, and the share of total employment this represents in each area.
- 7.49 Changes in employment have seen much more variation between areas compared to changes in the total number of businesses. Though employment has seen a decline, this is perhaps of less significance than the large shifts of employment between sectors or areas – particularly in the cases of Chelmsford and Colchester.
- 7.50 These two locations have seen more extreme falls and rises in sport employment respectively, and further investigation is needed to more fully understand this. In the case of the significant fall in Chelmsford, this has been driven by a fall in employment in sport education. It is not clear that this relates to the closure of a large institution but may more likely be related in part to ‘re-classification’ driven by shifts in core funding for sport education, with potential rises in self-employment in the sector not captured in the employee measure below.

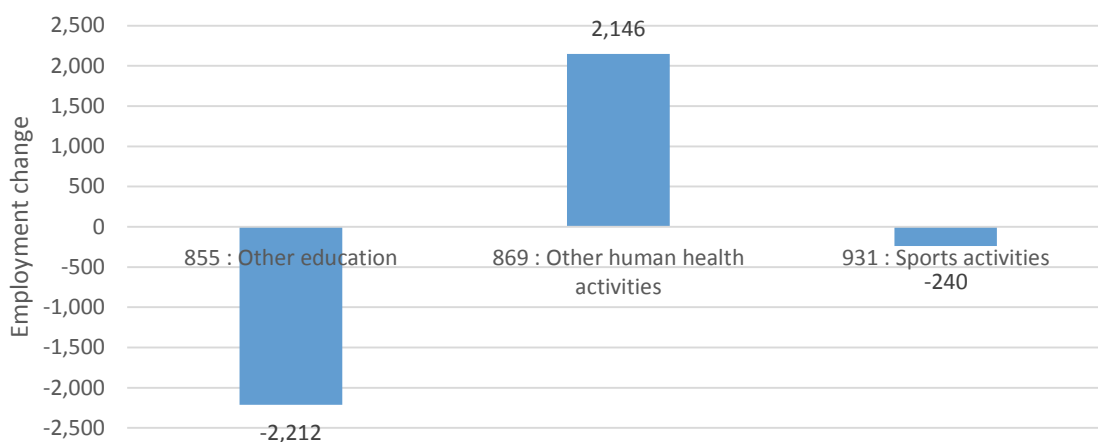
Area	Sport employment 2016	Sport employment as a % of all employment 2016	Sport employment growth by area since 2010	Sport employment % growth on 2010
Colchester	3,750	4.7%	2024	117.3%
Castle Point	829	4.1%	147	21.6%
Uttlesford	671	1.8%	98	17.1%
Tendring	1,340	3.6%	154	13.0%
Harlow	1,037	2.5%	92	9.7%
Basildon	2,666	3.2%	211	8.6%
Southend-on-Sea	2,191	3.4%	68	3.2%
Rochford	995	4.7%	-25	-2.5%
Epping Forest	1,531	3.2%	-70	-4.4%
Braintree	1,117	2.1%	-53	-4.5%
Thurrock	1,371	2.2%	-259	-15.9%
Brentwood	948	2.7%	-181	-16.0%
Maldon	507	2.7%	-194	-27.7%
Chelmsford	2,454	3.0%	-2319	-48.6%
<b>Column Total</b>	<b>21,409</b>	<b>3.1%</b>	<b>-306</b>	<b>-1.4%</b>

7.51 In the case of large rises in sport health and physical activity seen in Colchester, this is likely to be related (similarly) to re-organisation of health provision in the area in line with national moves to increase out-of-hospital interventions. Colchester has a particular cluster of health employment, totalling 14,000 people and representing 17.7% of employment in the area compared to 12.1% in the East of England region. The increased remit of Allied Health Professionals<sup>20</sup> in an area with very high levels of employment in hospitals is likely to explain a large part, if not all of this growth, as staff are re-purposed towards early intervention roles.

7.52 The overall fall in employment (-306) over the period to 2015 has been driven by the following changes in sport sectors.

<sup>20</sup> 'Other human health' (our health and physical activity proxy sector) has the highest concentrations of AHP's within any health sector. See AHP's into action for more context on the significance of this: <https://www.england.nhs.uk/wp-content/uploads/2017/01/ahp-action-transform-hlth.pdf>.

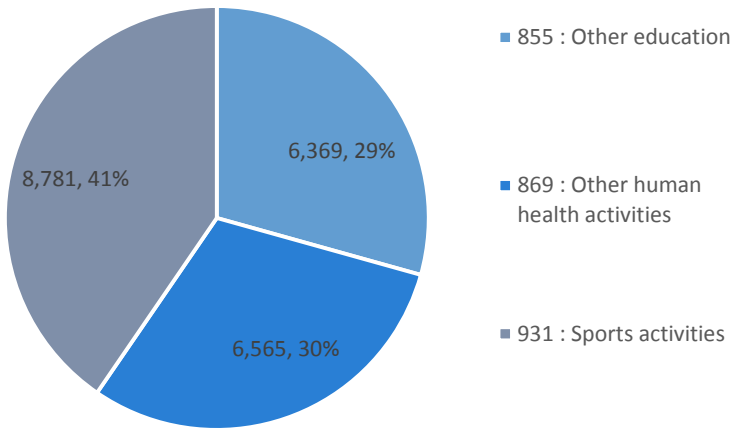
### Contribution to sport sector employment changes in Active Essex CSP 2010 - 2016



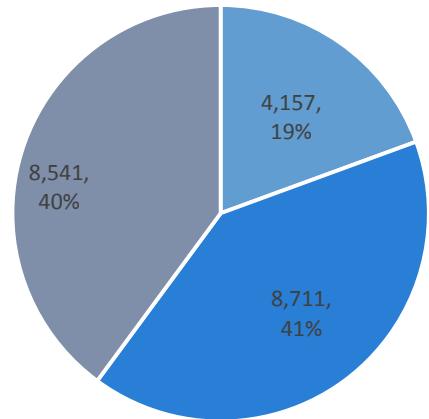
- 7.53 Other Education has lost 2,122 employees (-34.7%), Other Human health has gained 2,146 employees (+32.7%), and Sports activities has lost 240 (-2.7%).
- 7.54 The balance of change means there has been a more significant shift in the proportions of employment in each sector than the proportions of businesses. Within the business base Other human health has gained a +6% share of the total, but within the employee base the share has increased by almost double that at +11%. Other education has also lost the greater share of employment, with the shift in the sport employment balance working in the opposite direction to shifts in the business base balance.
- 7.55 It is clear that ‘Other human health’ is an expanding sector in terms of both businesses and employment. Business dynamism in ‘sport activities’ is not matched by employment growth, but with an expanding entrepreneurial base there is likely to be potential for growth in both commercial and community sport settings – though the nature of this will be dependent on the balance of private demand growth and expanded community provision.
- 7.56 The fall in sport education in Chelmsford presents a challenging picture – but looking in more detail has revealed that the fall does not relate directly to sport education, but ‘other education not elsewhere classified’. Normally a more minor sector within ‘other education’, there was an (abnormally) high concentration in Chelmsford, and it is a fall in this rather than sporting elements of other education which has driven the fall.
- 7.57 It should be noted that this fall does not therefore represent a significant decline in demand for sport skills. As discussed in our section on sport occupations<sup>21</sup>, sport roles comprise around half of roles in our sport education sector, however the fall registered has been from the section of other education which does not tend to demand sport skills and roles intensively. Conversely, had this not been the case it would have led to an overestimation of demand for sport skills from the education sector in the Chelmsford area.

<sup>21</sup> See appendix I and II for the detail of sport specific occupational intensities within sectors

2010 split of sport sector employee base

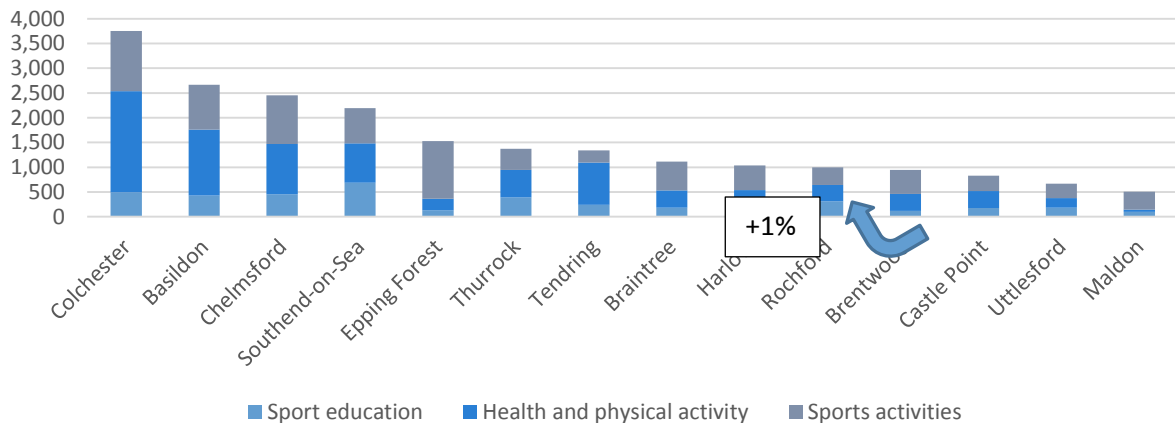


2015 split of sport sector employee base



7.58 Profiles of the split between the three sub-sectors in 2016 can be seen for each of the Active Essex areas below.

Numbers of sport sector employees in Active Essex CSP by type and area in 2015



**Self-employment in sports:**

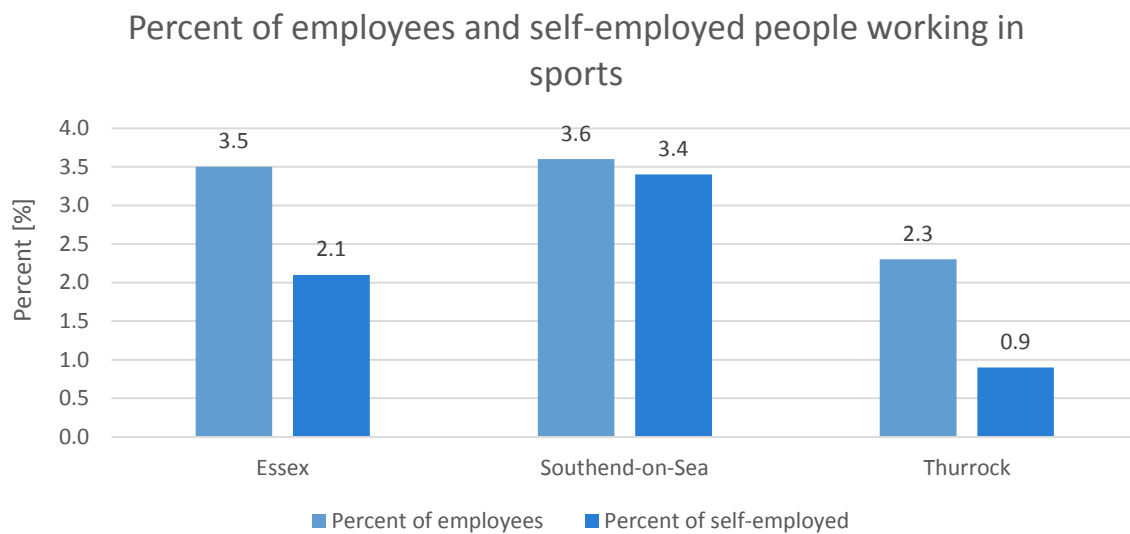
7.59 In terms of those who may be self-employed and working in sports roles, these people have not been captured by the analysis so far covering employees. The following section estimates the scale of self-employment in Active Essex CSP in 2015.

7.60 In order to be able to include self-employed people in an analysis of the scale of the sports sector, and sports skills prevalence, we have identified several occupational categories which are consistent with sport employee occupations, including:

- Sports and leisure assistants
- Physiotherapists

- Occupational Therapists
- Fitness instructors
- Leisure and sports managers
- Vocational trainers and instructors
- Dancers and choreographers

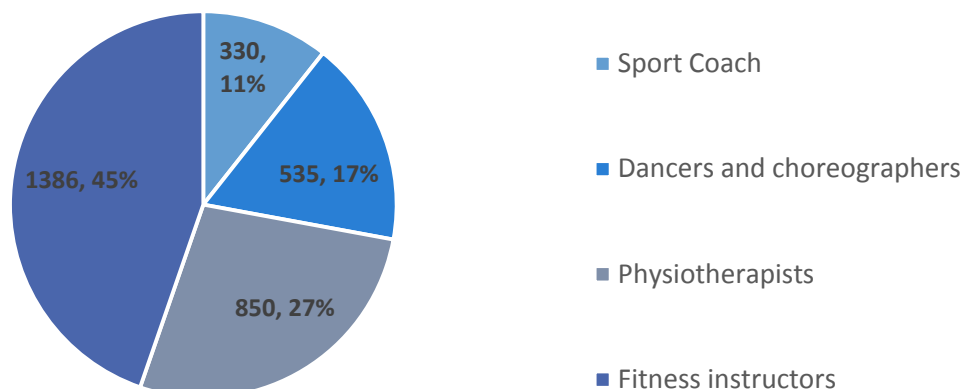
7.61 At this detailed level of self-employment survey-derived estimates are subject to a larger degree of error, and are not intended to reflect a precise breakdown. but below we can see the prevalence of employees compared to the self-employed categories - across Essex, Thurrock and Southend:



7.62 In total, it is estimated that just over 3,100 people are self-employed in sports sectors in Essex CC, Southend and Thurrock. There were 148,700 self-employed people in Greater Essex in 2015 and Sports related self-employment therefore makes up 2.1% of all self-employment. This is below the proportion of all employees working in sports, and self-employment in sports is higher in Southend and lower in Thurrock.

7.63 Due to the small sample of self-employed people in some districts it is not possible to report results by individual district. Also, because the survey is sample based results are unlikely to reflect the full diversity of self-employment in sports sectors. Our results have identified four roles (of the seven listed) picked up in the Annual Population Survey sample, with fitness instructors being the most prevalent category of sport self-employment.

### Self employment - proportions in sports occupations in Greater Essex 2015.



#### 7.64 Overall results for self-employment suggest the following:

- Fitness instructors are the most common category in Essex CC, and overall.
- Self-employed Sport coaches are relatively more prevalent in Southend than other Essex areas, making up an estimated 50% of sport self-employment in Southend.
- Dancers and choreographers make up 17% of the total self-employed sports occupations, but we estimate that this represents over 50% of the total dancers and choreographers in Greater Essex<sup>22</sup>. While This Girl Can promotes greater roles for women in some traditionally male-dominated sports areas, there may also be scope to promote crossovers between the creative arts and sport which promotes dance positively to young men.
- Physiotherapy is a significant category, and though not all physios will be operating in sports settings – up to 850 further self-employed people can be added to our initial estimate of 296 physiotherapists employed in sports sectors. While the settings they operate in are unknown, the wider role of AHP's in community settings and the public health benefits of supported physical activity are increasingly recognised.

#### Summary

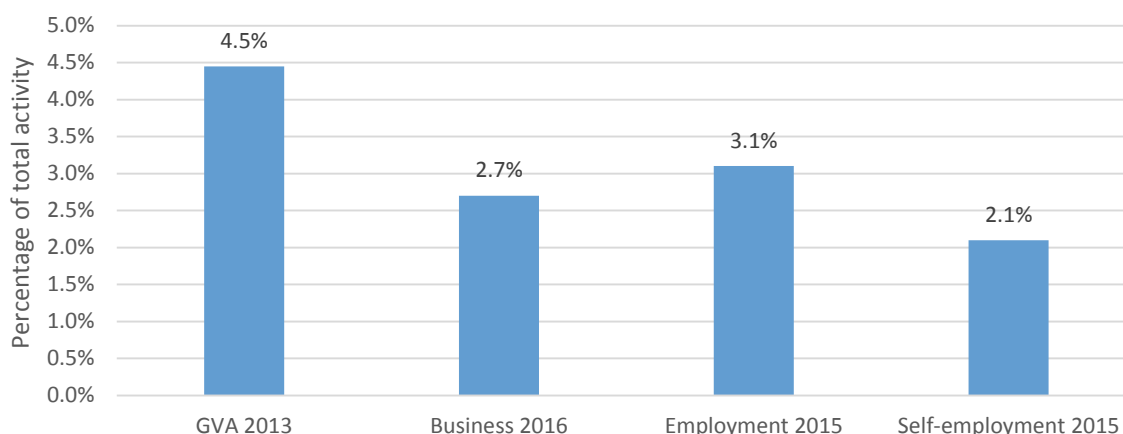
We have looked at the components of sport GVA, business dynamics and employment changes in the sport sector across Active Essex CSP.

Overall, the sector contributes the following proportions to the total economic activity and output of the CSP area in terms of GVA, business, employment and self-employment:

<sup>22</sup> Our estimate adds 535 self-employed dancers and choreographers to the original estimate of 508 dance and choreography employees in the 'sport education' sector.



### Percentage contribution of sports to measures of economic activity in Active Essex CSP



- 7.65 The total GVA contribution of 4.45% of the total is comparable to the scale of the Creative Industries as a sector, which represented 5.2% of the national economy in 2015<sup>23</sup>. We have selected this comparison as it highlights the scale of sports contribution to the economy being similar to the creative industries, but potentially receiving less attention in terms of its economic significance.
- 7.66 In terms of businesses, the base is significantly smaller with the business base of the creative industries standing at 8.7% of the total across Essex CSP compared to just 2.7% for sports businesses.
- 7.67 Employment however contributes a more comparable share, with 3.1% of Active Essex CSP employment is sports related sectors, compared to 4% for the creative industries. This is useful as it helps us understand that while there are many more creative businesses, they tend to employ less people on average. This also suggests that current employment in sport sectors is concentrated to a great extent around physical assets of a certain scale. Some people spoken to as part of the research highlighted the need to remove ‘friction’ between inactivity and access to sport for many people – and increased self-employed entrepreneurial activity in the sport sector could be one mechanism which would help increase delivery of sport and activity in areas of need.
- 7.68 Self-employment, in contrast to employment represents just 2.1% of all self-employment, compared to 13.5% of all self-employment being in creative industries. In light of changes to the qualifications framework surrounding coaching, with sport coaches and fitness instructors making up 56% of sport self-employment there may be scope to explore how to support more people to access the new progression framework to encourage entrepreneurialism and start-up self-employment behaviour which can also translate into business growth.

<sup>23</sup> GVA estimates for the creative sector are not available at the Essex CSP area level.

# 8 Consultation Results

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8.1 As part of the research Shared Intelligence undertook a wider consultation exercise involving sector stakeholders, representatives and businesses from the sports sector, as well as talking to non-sport employers and organisations to understand how they perceive the value of sport and active workforce initiatives. Key points have been recorded and these have formed the final recommendations and key actions.

## Key stakeholder recommendations

### Training jobs and skills

- Soft, transferable and life-long learning behaviours are essential as many jobs that people will be fulfilling do not yet exist.
- Need a demand-led coaching plan – one that better supports behaviour change, not just sports discipline.
- There is a specific gap in the assessor market for new coaches, one that needs to be developed as coaching qualifications change. Partner coordination to address this gap could lead to a successful ‘gig-economy’ approach in the sector.
- We need a ‘fitness instructor’ version of UBER to bring physical activity into daily life.
- As the economy moves towards a ‘gig-economy’, we need to offer training and skills development with an abundance of soft skills to support its growth.
- Leadership and management skills are limited and this is hampering growth.
- There is a specific gap in health coaches who are able to bring together two key sectors and deliver wider outcomes.

### Partnership

- Obesity levels are a real issue and should be described as an epidemic.
- There are new Public Health district level responsibilities for health and physical activity. Collective and strategic approaches to reducing health inequalities are needed as well as coordination in a central position.
- NGB’s have created a tension between community delivery and participation. This is about more than improving your backhand!
- Programmes such as ‘Fitness in Mind’ and the appointment of ‘Health Navigators’ will be instrumental in resetting the agenda to drive physical activity.

### Funding and finance

- How social assets are made available to the community needs to be reviewed in order to raise participation and target diversity.
- There are physical assets and people assets; they need to be used better in combination and recognise there will not always be enough money to deliver separate agendas.

- Lack of funding should not be an excuse for lack of delivery in schools. They mustn't wait for free provision but innovate through local networks.
- Funding is fragmented and a single pot from which to deliver would promote sustainability of offer.

#### Awareness Raising

- More visibility is needed of pilot schemes such as Active Travel (school cycling) which take an 'upskilling' approach to teaching and fixing bikes and supports skills development.
- Market awareness about health employment outcomes needs to be delivered through sports training and career paths.

### Sports business survey summary

8.2 A total of 28 sports businesses took our survey. Of the respondents, there was broad mix of executives, middle managers and officers. The businesses that responded to the survey operated in multiple areas of sport and health development.

#### Recruitment

- 56% expected their workforce to increase over the next year, 24% expected their workforce to stay the same and 16% predicted a fall.
- The easiest role to fill was operational staff, with 35% classing recruitment to these roles as either "very easy" or "easy". Whereas, 20% of respondents regarded non-managerial support as hard to fill, a figure higher than the other roles.
- Respondents gave a variety of reasons for jobs being hard to fill. 47% blamed this on a low number of applicants with the required skills, whilst 37% pinpointed both lack of work experience and a low number of applicants with the required qualifications as the reason for recruitment difficulties.
- We asked whether, hard to fill vacancies were causing any problems. The most common responses were: delays developing new products or services (47%); increased workload for other staff (47%); difficulties introducing new working practices (32%); and difficulties meeting customer service objectives (32%).
- 20% of respondents had employed school leavers, 75% college/university leavers, 55% apprentices, 50% people from inside the industry, 20% from National Training schemes for young people and 55% experienced people from other sectors over the last 12 months.
- Respondents also stated that they had links with an even wider range of organisations. These included Cancer Research, Active Essex and Creative Sport and Leisure and Sport England.

#### Skills

- We asked which skills have businesses found to be lacking among applicants. 47% said workplace behaviours and skills specific to their sector. 41% stated qualifications specific to their sector and soft skills (such as team-work and communication).

- Following on from these, we asked respondents to describe the main kinds of skills that are lacking, including any qualifications specific to their sector that are lacking. Answers included:
  - Customer orientated skills;
  - Commercial awareness;
  - Organisational skills;
  - General knowledge of sports development and coaching qualifications.
- We asked whether anything else could be done to help businesses recruit the staff that they need. Although many simply said no, there were suggestions for improving provision for coaching courses and the expansion of the coach and leisure apprenticeship programmes in Essex.

### Current workforce

- We asked which of types of skills businesses had found lacking when looking to promote or develop their current workforce. 73% said soft skills, with 46% stating workplace behaviours and 37% saying skills and/or qualifications specific to their industry/sector.
- With regards to what organisations were doing to address these skills gaps, 62% said they were providing further training and 31% expanding trainee programmes.
- We then asked whether staff were undertaking any form of training. From 11 respondents, 55% stated internal training, 46% said apprenticeships, 36% traineeships and 18% said either a foundation degree or NVQ.
- Respondents had a number of links with education institutions. The most popular were colleges of further education (92%), schools (69%) and universities (62%).

### Training

- Our final substantive question was to what extent any of the listed factors would encourage organisations to provide more training to their staff.
- 58% would definitely provide more training if financial assistance were available to help with the cost of training.
- 39% would definitely provide more training if more relevant courses were available.
- Only 15% would definitely provide more training if better quality providers were available locally.

## 9 Recommendations

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### Summary of our recommendations

9.1 There are considerable policy drivers which place sport and physical activity at the heart of the solutions. In an attempt to better support the sector and its progression through a variety of agendas, a skilled workforce remains central to success. In preparing the set of recommendations below, we have considered its ability to raise participation levels, provide for a new demographic of demand and raise the profile of the sector given its ability to deliver outcomes for public health, infrastructure and economic development.

9.2 We have grouped our recommendations under four headings reflecting themes raised by stakeholders during workshops, in our conversations, and our analysis of sector and occupational data.

#### Theme 1: Training, jobs and skills

9.3 Both CIMSPA, Sport England and the CSPN recognise the importance of professionalising the sport workforce, and the opportunities from reformed qualifications and training frameworks were actively highlighted by the majority of stakeholders consulted.

Recommendation 1: Create awareness of (new) opportunities in the sector for leaders and coaches. Active Essex CSP is well placed to support increased brokerage and promote labour market intelligence through its partner network, communicating the opportunities to organisations who can deploy up-skilled workers to increase participation.

Recommendation 2: Provide better access to the 11-14 learner group and promote volunteering and career opportunities which offer the fullest range of sport types (not just football). Feedback from stakeholders has suggested that access to a wide variety of sports options is patchy across the CSP, and to address this Active Essex should increase engagement with NGB's and representative bodies to improve reach and create a more demand led and less supply driven sport-delivery framework. Those who have volunteered in sport at an earlier stage are also more likely to strengthen leadership and soft skills demanded by sport employers.

Recommendation 3: Encourage FE tutors to recognise the value of 'progress' not just completions. Customer skills are often more highly valued by employers than qualifications, but funding is directed purely at course completions for many sports BTEC courses at level 2 and 3. In order to promote more sustained sport sector employment outcomes Active Essex should encourage tutors via the FE network to develop more focus on employability outcomes.

Recommendation 4: Developing Colleges work experience offer in the sport sector. Active Essex is well placed to support brokerage between colleges and sport businesses, and provide a central point of contact which could be developed as a resource for education providers to access opportunities through. In combination with recommendation 3 above this can also support improved understanding of expectations from sport sector employers, and improve learner understanding of the sport workplace and the skills required.

Recommendation 5: Create a map of 'bite-sized' learning tools and a forum to share 'what works'. Modular learning is an important element of ongoing development and life-long learning agendas, and the ability to augment existing qualifications to meet emerging areas of need or demand is critical to sustaining employment in a sector with very high attrition. Active Essex should maintain and regularly update a 'map' of relevant CPD opportunities which its stakeholders and partners can use as a tool.

## Theme 2: Partnership

9.4 Active Essex CSP and Creative Sport and Leisure will achieve more by working with partners to deliver the Sport and Physical activity vision for Essex, playing a co-ordination and brokerage role rather than taking on direct delivery. To do this effectively, the objectives of a diverse set of organisations will need to be galvanised around an action plan which underpins more effective joint working.

Recommendation 6: Support the creation of a business and education provider-led sub-group which can generate and feed up market intelligence to the Essex employment and skills board and SELEP skills board. This could be convened by Active Essex CSP, but should be led by sector representatives and education providers to be most effective. The group would work together with partners to identify opportunities and catalyse activity and joint working between employers and educators which support

Recommendation 7: Support the delivery of employer-led joint sport, leisure, physical activity and health career fairs. Several consultees noted that post-16 career fair funding has been cut, limiting the exposure and contact between learners and employers in sport - but that there was an interest and ambition to create a market-led model to address this gap. To maximise potential outcomes and create awareness of more diverse applications of sport skills this should include appropriate elements of the health and physical activity sector alongside more traditional sport employers.

Recommendation 8: Support the development of a health and wellbeing navigator role for the CSP which co-ordinates the intersection between HWB and CSP activities and objectives. The role of Health and Wellbeing Boards in promoting and funding physical activity, in particular for under-represented groups, is increasingly important. As a growth area which is less familiar to traditional sporting operations, especially in terms of factors such as safeguarding and specialist pre-or post-natal specialisms, take-up of opportunities can be raised via access to a trained sector navigator with specialist knowledge of how to match sport and physical activity providers to health need.

Recommendation 9: Promote (internally) the importance of links with Economic Development and economy related outcomes linked to sport and physical activity. In particular, these links will be important with respect to maximising benefits from the new apprenticeship levy and CIMSPA trailblazer programme which goes live this year and will replace all previous sport apprenticeship frameworks by 2020.

Recommendation 10: Continue to support local active networks and encourage them to feed-back local intelligence which can support intelligence creation about needs and priorities for activity, including local responses and initiatives. Local networks were valued highly by all consultees we spoke to, and are a primary source of live intelligence for the wider network to draw on.

### Theme 3: Funding and finance

9.5 Funding is out there but awareness and the ability of organisations to access it can vary significantly. Consultees identified the need for some extra flexibility to develop and innovate respective offers, and also identified Active Essex as an organisation which they trusted to help prioritise and allocate funding.

Recommendation 11: Create awareness of any changes to funding priorities and opportunities from key bodies such as Sport England; support stakeholders to bid for and access this. Sport England have existing support mechanisms to enable organisations to access funding, though in some instances awareness of these is not consistent across the Active Essex patch; where appropriate, Active Essex could consider providing direct support to local individuals, consortia or successful pilot programmes to understand and access funding using existing capacities.

Recommendation 12: Active Essex should consider whether there is scope to lead on bringing some / more fragmented elements of funding together into a 'single Greater Essex pot', and play a 'gatekeeper role' in allocation. Many consultees highlighted that they valued and trusted Active Essex as an organisation, and saw an opportunity for them to step in and fill an identified gap. Smaller and more local sport delivery partners have more limited capacity to bear administration costs of funding. In taking on this role Active Essex could both draw on and free up resource of partners as appropriate.

### Theme 4: Awareness Raising

9.6 The current pace of change in the sport sector has implications for all sport and physical activity businesses, coaches and organisations. Some are better placed to understand the opportunities (or threats) this may entail than others but to ensure maximum take-up and enable employers and deployers to forward plan more needs to be done to communicate opportunities to the widest audience.

Recommendation 13: Promote the sport sector as an opportunity sector within wider economic priorities, recognising the value of cross-cutting benefits it delivers. Active Essex should work through partner agencies such as the Essex Economic Commission, SE LEP growth board, and Economic Development functions of the CC, local areas and two Unitaries to promote sport as an economic sector with unique benefits. Awareness of how sport can impact on (for example) the five themes for action in the Economic Commission. Active Essex should focus on building USP's for the sport sector based on the findings of this report and promote them within area plans and economic strategies where appropriate.

Recommendation 14: Develop and promote positive case-study examples of how sport benefits the individual, coaches, participants, employers. Linked to the wider USP of the sector, case studies highlighting the diverse impacts of sport and linking them to area plan objectives and other existing priorities can highlight current impacts of sport, and examples of 'best practice' within the sector.

Recommendation 15: Highlight and promote the increased range and diversity of activity to increase awareness and uptake, using appropriate media to promote a 'good news' focussed and inclusive approach. Traditionally 'niche' or specialised sports tend to generate participation from more elite or wealthy individuals. As the range of sports expands to promote inclusion through a more diverse offer, it will be important to market this offer appropriately to generate increased participation from

the target audience – i.e. those who may have been unlikely to participate otherwise. Inclusive offers and seasonal or other highlights could be promoted via a public facing CSP newsletter for example, using partner organisations to ‘cascade’.

Recommendation 16: Encourage education providers to convene a forum for mutual support and information which supports positive knowledge transfer about opportunities for educators and learners in the sector. In a landscape of fast-paced change in terms of skills frameworks and target customers for the sector; education providers will need to understand and keep on top of new developments. To be most effective this would be owned and driven by the education provider organisations themselves; however initially Active Essex could provide a facilitation role in highlighting specific opportunities which have the potential to galvanise activity which can then be sustained by providers.



# 10 Sector Skills Action Plan

## An action plan for delivery

10.1 The recommendations outlined in this report require a set of actions in order to ensure that can be delivered. In considering the nature of the actions volunteered by partners during the consultation phase of this work, we have created an outline of next steps. Ownership across the partnership will be essential to the overall success.

Theme	Action	Next steps
<b>Training, jobs and skills</b>	<p>Create awareness of opportunities in the sector for leader / coaches</p> <p>Early access to 11-14 group</p> <ul style="list-style-type: none"> <li>• Power of volunteering</li> <li>• Career roles (more than just football)</li> </ul> <p>Mapping of bite-size learning tools and replicate best practice</p> <p>Galvanise tutors to recognise value of 'progress' not just completions</p> <p>Develop colleges work-experience offer</p>	
<b>Partnership</b>	<p>Create sub-group / partnership to relay / develop messages to Essex Skills and Employment Board, South East LEP, etc.</p> <p>Deliver joint sport, leisure and health career fairs</p> <p>Develop links into health and wellbeing agents</p> <p>Internal links within councils e.g. economic development teams/ apprenticeship levy</p> <p>Networking / partnerships within / for sector through active networks</p>	
<b>Funding and finance</b>	<p>Develop awareness of Sport England and their support mechanisms for funding schemes</p> <p>Facilitating joined -up working</p> <ul style="list-style-type: none"> <li>• Bring funding in</li> </ul>	

	<ul style="list-style-type: none"> <li>• Single pot/agenda</li> </ul>	
<b>Awareness Raising</b>	<p>Raise the perception of sector by leveraging resources and considering a County-wide approach</p> <p>Capture case studies to highlight wider opportunities</p> <p>Media campaign to understand what is happening in local area</p> <p>Promote inclusivity and range of activity i.e. walking, football, raving badminton</p> <p>Implement sub-groups/ fora for education institutes e.g. Facebook for advice/experience</p>	

# 11 Appendices

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## Appendix I: Methodology, definitions and sport skills intensity within sectors

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### Our methodology and Definition of the Sector:

- 11.1 The research has looked at five specific areas of sports related activity and employment. Each has a specific occupational profile within the sector, demanding a different balance of skills.
- 11.2 The following ONS SIC codes have been included in the sector analysis:
- 85.5: Sports and recreation education; **and** Cultural Education<sup>24</sup>
  - 86.9: Other human health activities
  - 93.1: Sports activities
  - *32.3: Manufacture of Sports Goods\**
  - *55.2: Holiday and other short-stay accommodation; and, 55.3: Camping grounds, recreational vehicle parks and trailer parks\**
- 11.3 The sectors identified all utilise sport-skills as an integral element of their business offer, though for some this represents a larger element of 'core business' than others. In order to create a profile of skills demand *focussed on core sport related occupations* we will adopt two strands of approach:
- Focussing in on the occupations demanding sport-specific skills; and
  - Understanding the growth in terms of employment and economic contribution of the above sub-sectors.
- 11.4 To avoid the risk of missing economic activity in sport not contained in these sector codes, we have also identified those who are self-employed and working in sport related occupations.
- 11.5 Key occupations have been selected at the greatest level of 'granular' detail available to inform the balance and scale of sport related skills within each sector. Our results below show the (significance of) sport occupations within the identified sectors:

### \*Excluded sectors

- 11.6 Two of the five sectors identified are considered less significant in terms of their relevance to the Sport Skills action plan due to their smaller scale and much lower intensities of sport skills as a percentage of the sectors occupational structure. Though health related sport has only around 10%

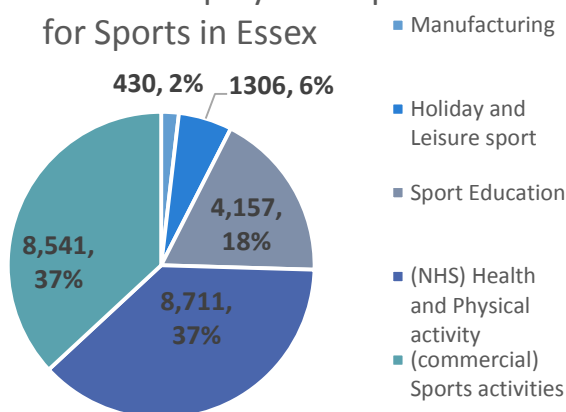
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<sup>24</sup> Taken as one sector to enable occupational analysis. Approximately 2/3 of total employment is in Sport education rather than Cultural education, and culture also includes 'dancers and choreographers'. 'Cultures of sport' are also important for e.g.: community youth workers, which have been included.

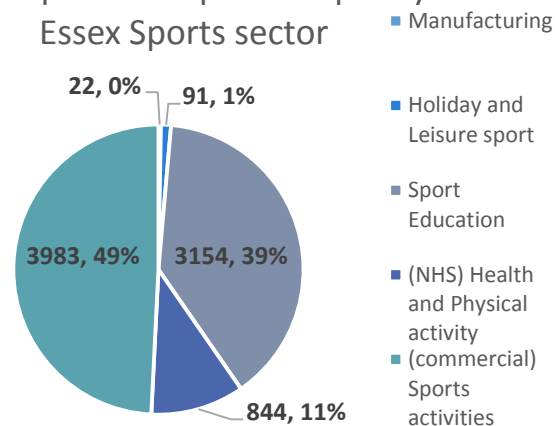
of occupations directly sport related, the scale and growth of these roles within the sector, alongside strategic tie-ins with Public Health agendas warrants its inclusion.

11.7 In the cases of Manufacture of sports goods, and Holiday and Leisure sport – occupations requiring sport skills are much less significant compared to general employment in these sectors, as can be seen by comparing the two pie charts below:

2015 Sectoral employment split for Sports in Essex



2015 Sports occupations split by Essex Sports sector



The profiles of our two excluded sectors: Manufacture of sports goods; Holiday and leisure sport are included in the appendix for context.

### Our sectors, profile and rationale

11.8 **Sport education (including elements of cultural education<sup>25</sup>):** is an important sector for several reasons. For many young people, it may represent the main and only structured physical activity they are exposed to on a regular basis. For some this may mitigate a lack of physical activity, and for others it may normalise sport and cultures of sport into peer groups and create personal goals. Young people are often exposed to seeing sport before being exposed to ‘doing’ sport and sport education plays a vital role in initial access to doing sport in a supportive peer group environment. Exposure to sport leaders and sport leadership role models is also important, and these sport leaders also play key roles in identifying sport talent at an early stage, and promote the confidence for learners to pursue sport at an increased level (amateur; semi-pro and pro- levels). Sport education has the highest proportion of sport-specific roles and occupations at 75.9%.

Sport education					
Businesses 2016	Growth 2010 - 2016	Employment 2015	Growth 2010 - 2015	Business % Growth	Employment % growth
695	180	4157	-2212	35%	-34.70%

<sup>25</sup> ‘Sport and cultural education’ is a single employment sector which can potentially be further split at a greater level of detail, though due to some crossover we have included all elements of the sector, but with primary a focus on *sport occupations*.

Sector	Sector and occupation total	
<b>Sport Education</b>	<b>4,157</b>	<b>100%</b>
<i>Occupations requiring sport skills</i>		
3442 Sports coaches, instructors and officials	1058	25.5%
2319 Teaching and other educational professionals n.e.c.	761	18.3%
3414 Dancers and choreographers	508	12.2%
3443 Fitness instructors	438	10.5%
1225 Leisure and sports managers	162	3.9%
3563 Vocational and industrial trainers and instructors	107	2.6%
2314 Secondary education teaching professionals	48	1.2%
3441 Sports players	34	0.8%
6211 Sports and leisure assistants	31	0.7%
3231 Youth and community workers	7	0.2%
Total	3154	75.90%

11.63 **Health specific sport roles ('Other Human health')**: is included as it contains many 'Allied Health Professional' (AHP) roles which are in the main only indirectly related to 'sport' but are important in terms of public health and physical activity promotion. Overall sport and physical activity based roles make up 9.7% of the sector. In many cases, physical activities are at the core of occupational therapy and physiotherapy practice, though these are not necessarily the main roles within the sector. AHP out-of-hospital interventions do however play an important role to play in sports injury treatment, the promotion of physical activity (OT) regimes as part of occupational therapy to reduce absenteeism, building motivation and physical confidence in 'safe' settings, and have a specific role in supporting injury rehabilitation and disability sport, providing the first stage of a route to meet the challenge which many (e.g.) Paralympians face post-disability or injury.

Human health activities					
Businesses 2016	Growth 2010 - 2016	Employment 2015	Growth 2010 - 2015	Business % Growth	Employment % growth
835	310	8711	2146	37%	32.70%

Sector	Sector and occupation total	
<b>Health and Physical activity</b>	<b>8,711</b>	<b>100%</b>
<i>Occupations requiring sport skills</i>		
2229 Therapy professionals n.e.c.	288	3.3%
2221 Physiotherapists	278	3.2%
2222 Occupational therapists	190	2.2%
3563 Vocational and industrial trainers and instructors	50	0.6%
3231 Youth and community workers	24	0.3%
3443 Fitness instructors	14	0.2%
<b>Total</b>	<b>844</b>	<b>9.70%</b>

11.106 **Sport and physical fitness activities:** encompasses the core provision and delivery of public, community, club-based and private sports activities, usually based around facilities with core sports physical infrastructure. The sector is diverse and to some extent (in the case of growing private gym membership) market driven. Public leisure centres are often subsidised to provide community access to sport, but encompass core commercial functions which are still highly customer focussed. Overall sport-specific roles and occupations make up 46.6% of roles in the sector. Often centred around core infrastructure sport and physical activities venues are also often the hosts of major and minor competitive sporting events.

Sports activities					
Businesses 2016	Growth 2010 - 2016	Employment 2015	Growth 2010 - 2015	Business % Growth	Employment % growth
750	100	8541	-240	15.40%	-2.70%

Sector	Sector and occupation total	
<b>Sports activities</b>	<b>8,541</b>	<b>100%</b>
<i>Occupations requiring sport skills</i>		
6211 Sports and leisure assistants	887	10.4%
3443 Fitness instructors	758	8.9%
1225 Leisure and sports managers	757	8.9%
3442 Sports coaches, instructors and officials	750	8.8%
3441 Sports players	398	4.7%
5114 Groundsmen and greenkeepers	326	3.8%
3563 Vocational and industrial trainers and instructors	76	0.9%
2221 Physiotherapists	18	0.2%
3231 Youth and community workers	13	0.1%
<b>Total</b>	<b>3983</b>	<b>46.60%</b>

## Appendix II – Excluded sectors

11.158 **Manufacture of sports goods** has an important role to play in generating value from the sports economy; and in creating innovation in the design of sports goods and sportswear. The design of and target market for sports goods and sportswear can have important knock-on effects in terms of access to sport and participation in sport. However, the sector has only a limited proportion of occupations requiring specific sport skills. ‘Design’ occupations have been included in this sector (though not in others) due to the specialist knowledge of sport required to develop successful sports products. Overall, 5% of the occupations in this sector, including design, require sport-specific skills. The benefits to productivity and product success from brokerage which introduces more sport skills into the sector could be explored further.

11.159 Other related sectors which may require specialist crossover knowledge could include the design and manufacture of prosthetics, including for Paralympic sport – though this category is not currently identifiable within ONS data.

Manufacture of sports goods					
Businesses 2016	Growth 2010 - 2016	Employment 2015	Growth 2010 - 2015	Business % Growth	Employment % growth
35	15	430	57	75%	15.30%

Sector	Sector and occupation total	
	Count	Percentage
<b>Manufacturing of sports goods</b>	<b>430</b>	<b>100%</b>
<i>Occupations requiring sport skills</i>		
3442 Sports coaches, instructors and officials	7	1.6%
3422 Product, clothing and related designers	4	1.0%
3421 Graphic designers	4	0.9%
2126 Design and development engineers	3	0.6%
6211 Sports and leisure assistants	2	0.5%
1225 Leisure and sports managers	1	0.3%
<b>Total:</b>	<b>22</b>	<b>5%</b>

Sports occupations in Manufacturing are not a significant element of occupational demand within the overall sports sector. However, given the high business formation, and potential for employee growth - this sector may nevertheless represent an emerging opportunity to utilise sports skills and design for sport at a high level, catering for markets beyond Essex and the UK.

**11.202 Holiday and Leisure Sport:** Leisure and holiday-sport activities have an important role to play in the sport economy, and can often be a source of initial exposure for people encountering novelty activities which may be unavailable for example at leisure centres or in urban environments<sup>26</sup>. These types of activities can play an important role in engaging people who have not engaged with more traditional sports. Occupations requiring specific sport skills make up just 7% of the sector, but with high transferability between these occupations and similar roles in sport education and core sport activities in leisure centres, gyms etc.

Holiday and leisure sport					
Businesses 2016	Growth 2010 - 2016	Employment 2015	Growth 2010 - 2015	Business % Growth	Employment % growth
85	5	1306	57	6.30%	4.60%

Sector	Sector and occupation total	
	<b>Holiday and Leisure sport</b>	<b>1306</b>
<i>Occupations requiring sport skills</i>		
1225 Leisure and sports managers	34	2.6%
6211 Sports and leisure assistants	29	2.2%
5114 Groundsmen and greenkeepers	21	1.6%
3442 Sports coaches, instructors and officials	8	0.6%
<b>Total:</b>	<b>91</b>	<b>7%</b>

Sport occupations in holiday and leisure sport sub-sector are also underrepresented relatively speaking compared to the sector's total employment. Future growth in these occupations is likely to relate to the strength of the county's visitor economy, and wider demand for tourism services.

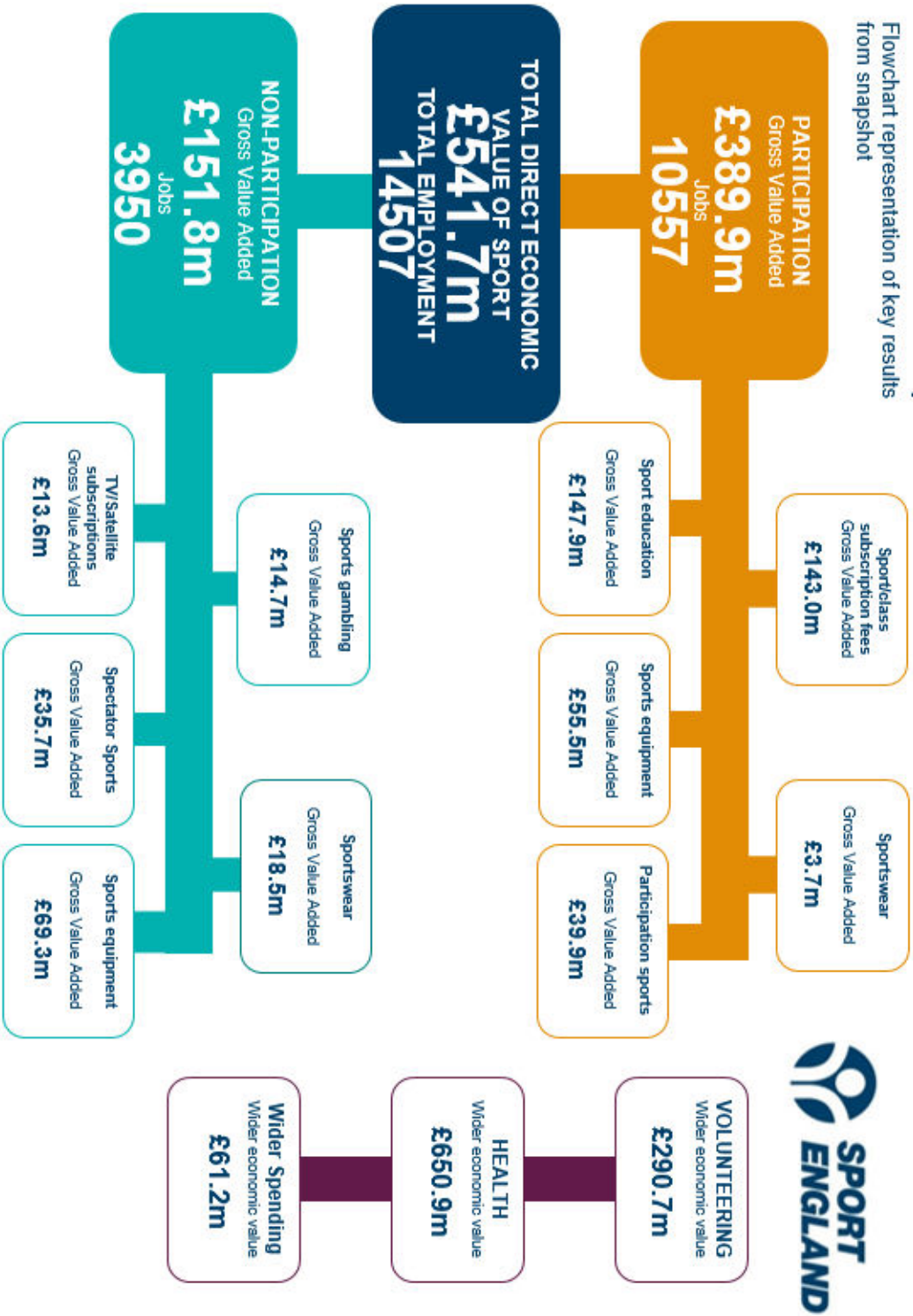
<sup>26</sup> For example: kayaking / canoeing, archery, sailing, climbing, horse riding, other informal competitions and activities.



# Appendix III – Sport England Model

## Economic Value of Sport for Active Essex

Flowchart representation of key results from snapshot



# Appendix IV – Organisations and remits of significance for the research

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## Active Essex

11.239 Active Essex is a publicly funded organisation, hosted by Essex County Council, whose aim is to make sport and physical activity accessible to all Essex residents. It:

- provides up-to-date information on sports, activities, events and programmes available in and around the county;
- runs training courses for those who are seeking a more structured involvement in sport and physical activity, for example as a coach or referee;
- funds clubs, community sport initiatives and individuals through small grants;
- partners with other organisations and trusted third parties to increase the number and range of opportunities available; and
- advocates for improved and enhanced sport facilities, funding and engagement for the communities it serves.

## Creative Sport and Leisure

*“Creative Sport & Leisure has a vision - to enable people to participate in sport, explore their creativity and to keep active and healthy... To provide local communities on a national basis with quality education, sporting, health and recreational activities through innovation and design.”*

11.240 Creative Sport & Leisure specialises in Apprenticeships, Traineeships and work based learning, specifically within the Active Leisure, Learning and Well-being sector.

11.241 Creative Sport and Leisure will work to achieve the following aims:

- Promote Education and Lifelong learning through sport within the local community
- Provide the relevant skills training to the next generation of Instructors, Coaches, Activators, Performers and Educators within the Active Leisure and Learning Sector
- Encourage more local people, especially children, to participate in sport and physical activity programmes that use sport to deliver social and economic outcomes.
- Work in partnership with local employers and stakeholders to identify the labour market gaps for the Active Leisure and Learning Sector.
- Deploy a diverse range of local people into corporate, public and voluntary environments to deliver on public health priorities for Greater Essex.

11.242 The delivery model of Creative Sport and Leisure follows the following principles:

- Specialist: Active Leisure Learning & Wellbeing

- Advanced Technical Skills
- Sector focused
- Employment orientated
- Co-Leadership and co-investment with employers
- Meeting current demand and identifying future need
- Complete ladders of educational opportunity
- Fusing the needs of employers with the needs of learners
- Demonstrating excellence
- Promoting equality, diversity, and opportunity
- Setting standards (Ethical Apprenticeships, Health and Safety, Safeguarding)

## Department of Culture, Media and Sport (DCMS) Sporting Future: A new sport strategy

- 11.243 In December 2015 DCMS published Sporting Future: A New Strategy for an Active Nation<sup>27</sup> following a public consultation with input from nine different government departments. It redefines what success looks like in sport by focusing on five key outcomes: physical wellbeing; mental wellbeing; individual development; social and community development; and economic development. All new government funding for sport and physical activity will go to organisations which can best demonstrate that they will deliver some or all of these five outcomes.
- 11.244 Funding will also be distributed in a way that focuses on those people who tend not to take part in sport, including women and girls, disabled people, those in lower socio-economic groups and older people.
- 11.245 It outlined the DCMS and the Department for Health's intention to work with the NHS, Public Health England, the Local Government Association and others to promote the integration of sport and physical activity into care pathways and maximise the potential of advice, prescribing and referral interventions by health and social professionals.
- 11.246 Sport England's remit is also being broadened, so that it becomes responsible for sport outside school from the age of five, rather than 14. This is to combat the persistent issue that a person's attitude towards sport is often formed by their experience as a child, and many people drop out of sport before they even reach the age of 14.
- 11.247 The strategy also confirmed plans to establish a **Sports Business Council** to develop a new business strategy that helps support growth, improve access to finance and develop skills in the Sport Sector.
- 11.248 Further key points included:

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<sup>27</sup>[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/486622/Sporting\\_Future\\_ACCESSIBLE.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/486622/Sporting_Future_ACCESSIBLE.pdf)

- Government will submit an annual progress report to Parliament;
- Local level partnerships between National Lottery distributors;
- More support for high-performance ‘non-Olympic’ sports;
- ‘Active Lives’ will replace the current ‘Active People Survey’;
- Promotion of ‘Workplace Challenge’ and encourage employers to offer employees opportunities to be more physically active;
- Sport England to develop a new coaching plan by 2016, covering qualifications and standards;
- New targets on public sector funding for sports organisations to reduce over-reliance on public sector and move towards sustainable mixed funding model;
- Establishment of Social Impact Fund for investment into sport;
- Sport England to develop workforce strategy in 2016;
- Large sports organisations to utilise apprenticeships.

### **Sport England’s response to the DCMS and new coaching strategy**

11.249 ‘Coaching in an Active Nation: The Coaching Plan for England 2017-21<sup>28</sup>’ is the Sport England coaching strategy. It describes a new definition of coaching which is less focused on technique and more on experience.

11.250 This shift in emphasis reflects Sport England’s expanding role in delivering sport and physical activity beyond the traditional core sports and athletics markets which was previously the focus.

11.251 *“Our vision is that everyone in England, regardless of age, background or ability, feels able to take part in sport or activity. Some might be fit and talented, but others won’t be so confident”.*

11.252 Experience is defined as a set of soft skills with values and attitude which is attuned to getting more people from a variety of backgrounds involved in sports. Coaching will be more aligned with strategic commitments to engage a broader and more diverse range of participants in sport. Greater work should be undertaken to identify people with the soft skills (and not necessarily the technical sporting knowledge) to become coaches and change the behaviour of people they might be well disposed to encourage to get involved.

11.253 The report identifies five benefits coaches can deliver in the communities where they live

- Physical wellbeing
- Mental Wellbeing
- Individual Development
- Social and Community Development

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<sup>28</sup> [https://www.sportengland.org/media/11317/coaching-in-an-active-nation\\_the-coaching-plan-for-england.pdf](https://www.sportengland.org/media/11317/coaching-in-an-active-nation_the-coaching-plan-for-england.pdf)

- Economic Development

11.254 The report outlines five strategic approaches for coaching

1: Making it easier to start coaching - There is evidence underrepresented groups find it harder to become a coach. Coaching organisations should be challenged to modernise their approach.

2: Foster an improvement culture - Coaches from underrepresented groups are less likely to engage in ongoing learning and are more likely to stop learning once they have received the minimum standard of coaching required to practice

3: Transfer Learning into practice - Many coaches are the 'customer service team' for sports in their communities. Coaching development is more effective when they are supported by their employers, deployers peers and colleagues.

4: Measuring the change and communicate the impact - The new definition of a coach is someone who does not necessarily come from the traditional sport system. The impact which coaches and coaching can have should be regularly communicated.

5: Enhance the delivery infrastructure - Lack of alignment between plans to encourage coaching and plans to develop coaching skills can mean that coaches are not meeting the needs of those they coach.

## **CIMSPA – the Chartered Institute of Management in Sport and Physical Activity**

11.255 Launched in 2011, CIMSPA is the professional development body for the UK's sport and physical activity sector. It has been awarded chartered status by the Privy Council, which came into effect at the start of January 2012.

11.256 CIMSPA provides leadership, support and empowerment for professionals working in sport and physical activity and a single unified voice for the sector.

11.257 The Institute holds two long term strategic priorities:

- To provide opportunities for young leaders to develop and succeed
- To provide leadership on the development and management of career pathways

11.258 The vision statement of the Institute is: *"To develop a vibrant, UK wide sport and physical activity sector, led by professionals providing advocacy and leadership and working in partnership with its stakeholders to help ensure the highest standards of service delivery."*

11.259 More recently, in 2014, CIMSPA was awarded sole custodianship for skills and workforce development within the physical activity sector. The ukactive Membership Council, the body representing all the major physical activity operators in the sector, formally recommended that

ukactive withdraw support from SkillsActive and the Register of Exercise Professionals and placed its support fully behind CIMPSA<sup>29</sup>.

11.260 CIMSPA has since developed the Trailblazer programme for apprenticeships in the sector, which the government has agreed should underpin standards for all apprenticeships from 2017.

*“From 2017, government funding will only be available for apprenticeships designed using this new process, and by 2020 all original apprenticeship frameworks will have been phased out. This represents an opportunity for the physical activity sector to refresh all existing apprenticeships and ensure they truly reflect the needs of employers, as well as set the basis for an agreed benchmark that all new training for physical activity staff are measured against.”*

## The Workplace Wellbeing Charter

11.261 According to the Office of National Statistics (ONS) in the UK 131 million days were lost to sickness absence in 2013. This is a significant number when considering how many of these days could be avoided if the workforce were supported to be more active, healthier and more aware of the health and health-related benefits of activity.

11.262 The Workplace Wellbeing Charter<sup>30</sup> (WWC) itself focuses on three key areas; leadership, culture and communication. It outlines a statement of intent which supports businesses to demonstrate their commitment to the people who work for them. The Charter briefly outlines the business and financial benefits to companies signing up but could be more comprehensively set out to increase numbers.

## Allied Health Professionals (AHP's) into action

11.263 'AHPs into Action' defines how AHPs can support sustainability and transformation plans (STPs) as set out in the '**Five Year Forward View**' (FYFV) 2014.

11.264 FYFV sets out the future direction of the NHS and the rationale for change. The report argues for:

- a radical improvement in prevention and public health;
- greater control for patients of the care they receive;
- a more integrated NHS with less barriers between GPs and hospitals and physical, mental and social care.

11.265 The report also identifies the need for workplace incentives to promote employee health and reduce sickness related unemployment.

11.266 AHPs into Action describes the impact AHPs have on people and populations, commitment to the way services are delivered, priorities to meet the challenges of changing care needs. AHPs into Action is a product for leaders/decision makers to inform how AHPs can be utilised to support health, care and wellbeing service delivery.

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<sup>29</sup> <http://www.futurefit.co.uk/uploads/documents/raising-the-bar/2016/FFT-ukactive-Raising-the-Bar-2016.pdf>

<sup>30</sup> <http://www.wellbeingcharter.org.uk/index.php>

11.267 These professions do not deliver emergency care but underpin more holistic, preventative and recovery based treatment approaches.

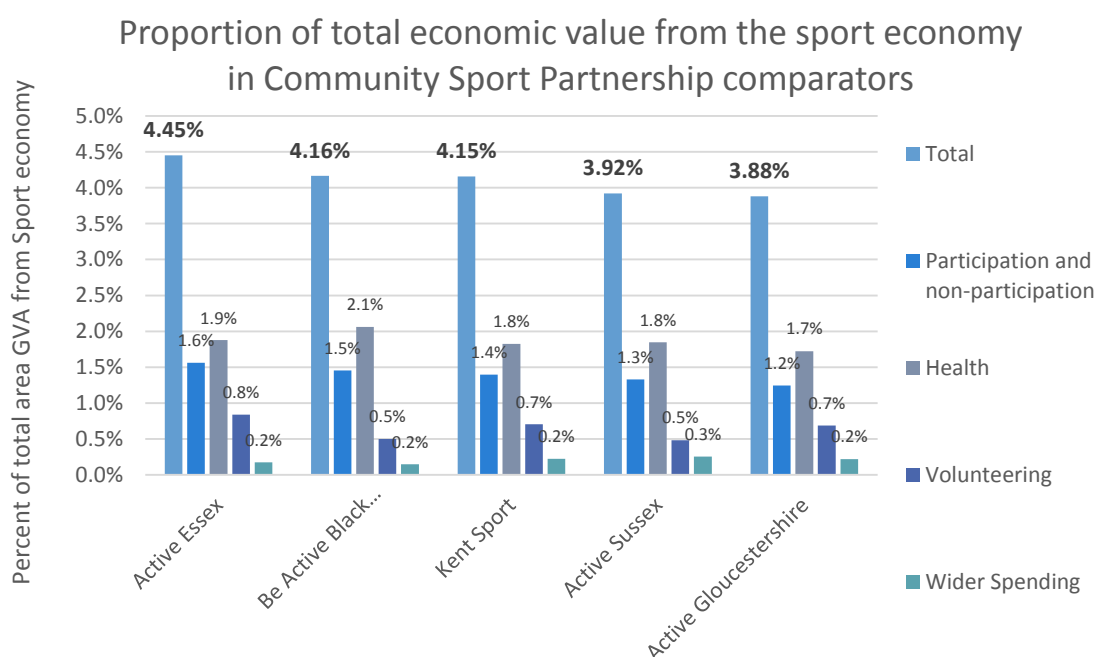
11.268 Allied Health Professions are a range of healthcare roles. 12 are identified in the report: AHPs into Action.

- Physiotherapists
- Dietitians
- Occupational Therapists
- Art Therapists
- Drama Therapists
- Music Therapists
- Prosthetists and Orthotists
- Podiatrists
- Orthoptists
- Paramedics
- Diagnostic and Therapeutic Radiographers
- Speech and Language Therapists

# Appendix V – Benchmarking Active Essex

## Benchmarking Active Essex against other Community Sport Partnerships (CSP's)

11.269 The following section will focus on the structure of direct value from sport in terms of participation and non-participation components, compared to the balance of value generated within other community sport partnerships. The figure below gives an overview of the performance of Essex against these other CSP's in terms of the proportion of GVA they contribute. Of the areas looked at, Active Essex CSP generates the highest total share of total economic value from sport<sup>31</sup>.



11.270 The level of GVA associated with the Sports sector can be analysed further by dividing into 'participation' and non-participation', highlighting the component parts of the sector's business focus in each area. Benchmarking in this way is not intended to compare total values, but rather the balance of existing activity in non-health and non-volunteering (i.e. 'direct') sports GVA. Some 'direct spend' from sectors such as sport retail, sport betting and gambling which are not included in our sector-skills and occupations analysis (following section) are captured directly below.

11.271 We have chosen similarly mixed urban and rural CC areas to benchmark against. Differences in overall sport GVA often relate most directly to the size of the area, but by selecting similar types of areas to compare we can look at differences in the composition of sports. Urban and more affluent area tend to have high shares of GVA from TV-satellite subscriptions, and for some areas there appears to be a link between deprivation and sports betting and gambling.

<sup>31</sup> Both Kent and Sussex generate slightly more total value, but this is less as a percentage of their overall economy.



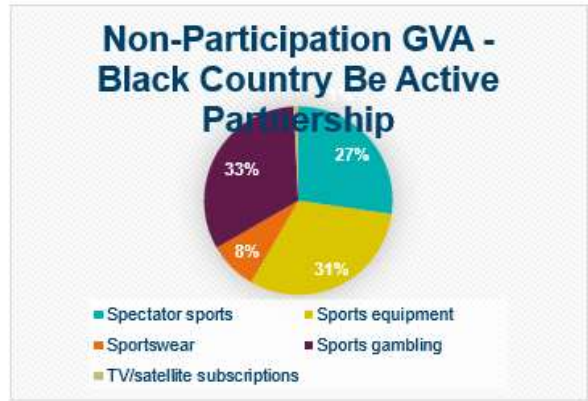
11.272 The Sport England Economic Value of Sport model has been used to benchmark ESSEX CSP against the following areas, highlighting differences in the share and totals for participation, and non-participation GVA from sport using their 2013 snapshot data.



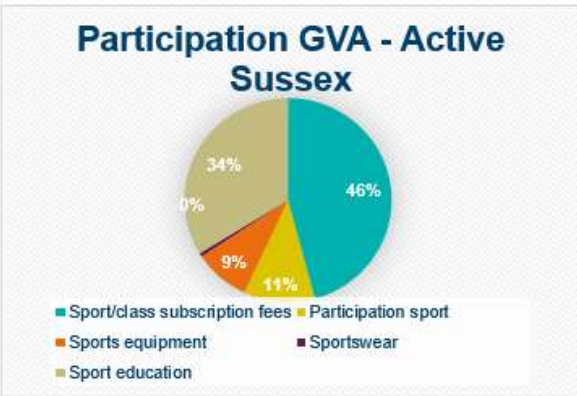
11.273 Comparing the split of Essex CSP GVA from participation and non-participation (above) to the Kent CSP (below) we can see that in both participation and non-participation areas Essex CSP is generating a higher proportion of value added from sports equipment, and to some extent non-participation sportswear.



11.274 Relative to the Black country Essex CSP also derives a higher share of value from sports equipment and subscription, but has lower portions of value than the Black country (or Kent) derived from sport education. The Black Country also has higher shares of non-participation spectator GVA, but much lower shares of GVA derived from sports equipment. The Black country derives significant GVA from sports betting and gambling.



11.275 And relative to Active Sussex Essex CSP has a lower share of participation GVA from sports subscriptions, but a higher share from sport equipment and sport education. Participation and non-participation GVA in Sussex CSP derives significantly higher shares from spectator sports.



11.276 Active Gloucestershire is comparable to Essex CSP in the proportions of participation GVA, with slightly higher levels of subscription and slightly lower levels of sport education. In non-participation GVA there is a very large



# Appendix VI – Sports business survey results

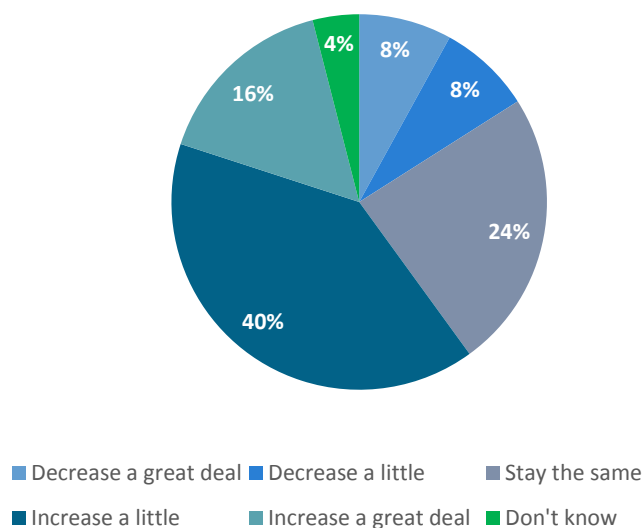
11.277 A total of 28 sports businesses took our survey. Of the respondents, there was broad mix of executives, middle managers and officers. The businesses that responded to the survey operated in multiple areas of sport and health development. The most popular were: sports development (84%); sport for social change/sport for development (80%); and traditional sports (72%). Respondents also worked with a range of age groups. 96% worked with children and young people aged 5-17, 84% with adults aged 18-64, 68% with older adults aged 65+ and 36% with early years (0-4).

11.278 68% of respondents stated that they worked with other groups with additional needs. These included adults with learning difficulties, people with disabilities and hard to reach communities.

## Recruitment

11.279 72% were responsible for recruitment or workforce development. We asked how, over the next twelve months, they expected their workforce to change. 56% expected their workforce to increase over the next year, 24% expected their workforce to stay the same and 16% predicted a fall.

**Figure 1: Over the next 12 months, how do you expect your workforce to change?**



N=25

11.280 We then asked, on a scale of 1-5, how difficult it was to fill job roles at each level of the company. These results are outlined in the table below. According to respondents, the easiest role to fill was operational staff, with 35% classing recruitment to these roles as either “very easy” or “easy”. Whereas, 20% of respondents regarded non-managerial support as hard to fill, a figure higher than the other roles.

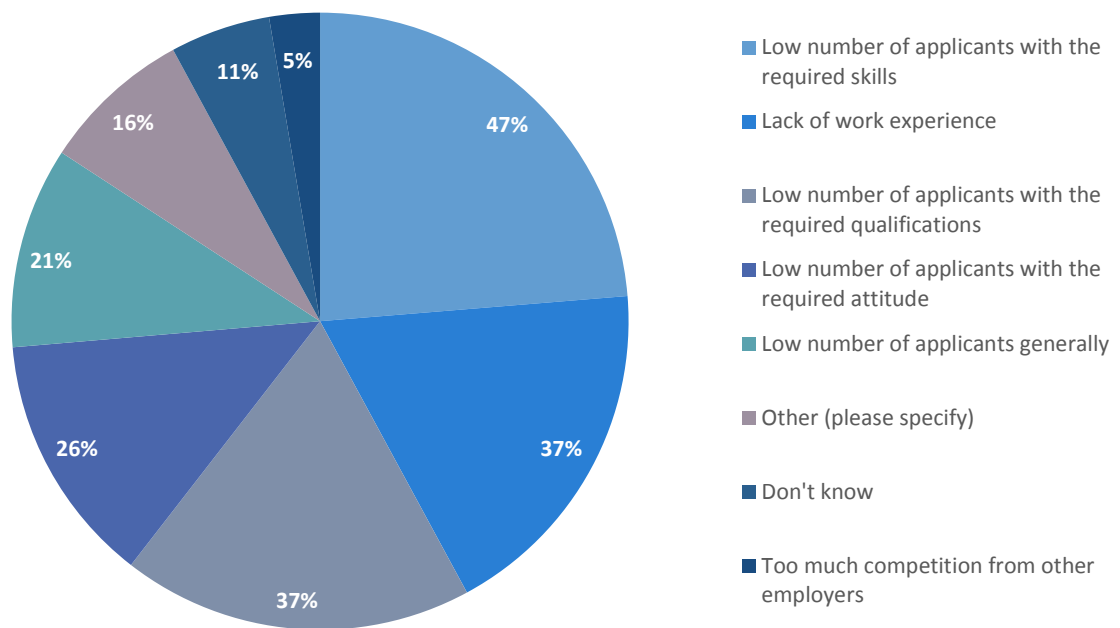
**Table 1: On a scale of 1-5, how difficult would you say it was to fill each of the roles?**

	1 – Very easy	2 – Easy	3 – Neither easy nor hard	4 – Hard	5 – Very hard
<b>Managers, supervisors, senior administrators</b>	10%	20%	55%	10%	5%
<b>Operational staff</b>	15%	20%	50%	10%	5%
<b>Non-managerial support</b>	10%	15%	55%	20%	0%

N=20

11.281 Respondents gave a variety of reasons for jobs being hard to fill. 47% blamed this on a low number of applicants with the required skills, whilst 37% pinpointed both lack of work experience and a low number of applicants with the required qualifications as the reason for recruitment difficulties.

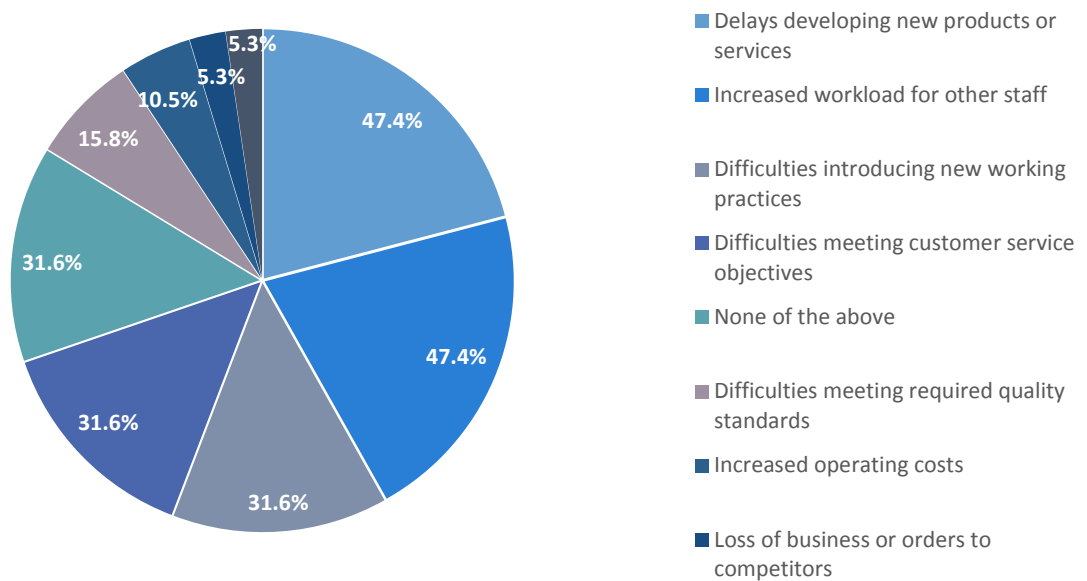
**Figure 2: What are the main reasons you have found jobs hard to fill in this establishment?**



N=19

11.282 We then asked businesses whether, generally speaking, hard to fill vacancies at their establishment were causing any problems. The most common responses were: delays developing new products or services (47%); increased workload for other staff (47%); difficulties introducing new working practices (32%); and difficulties meeting customer service objectives (32%).

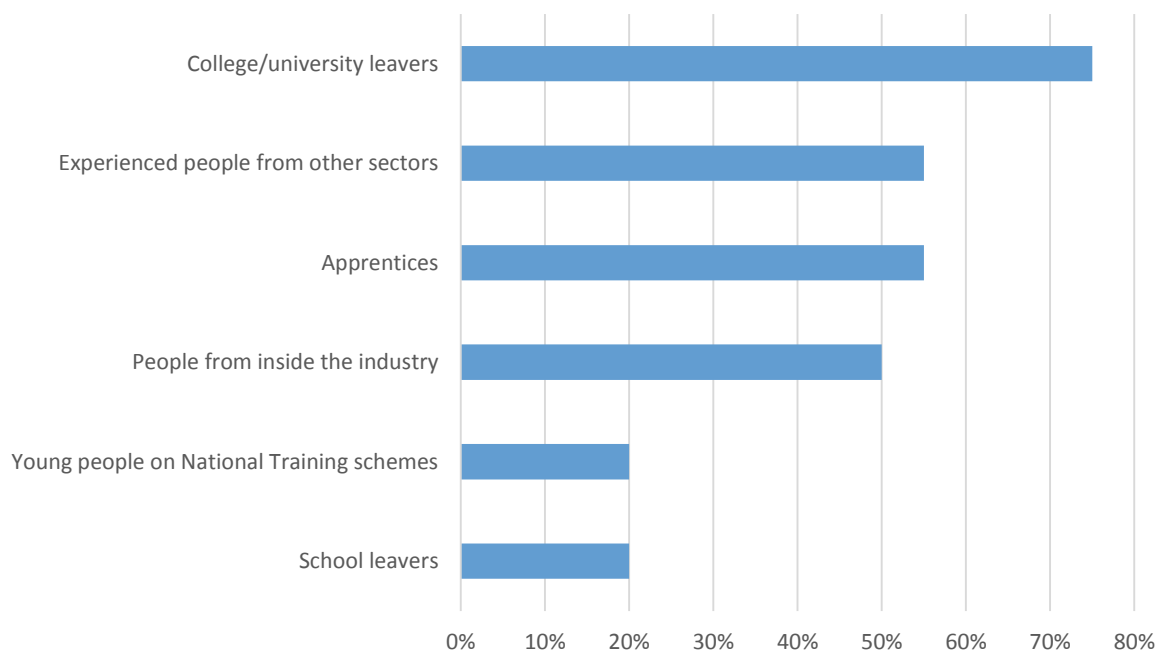
**Figure 3: Generally speaking, are hard to fill vacancies causing your establishment any of the following?**



N=19

11.283 Respondents had recruited from a wide variety of sources over the past 12 months. 20% had employed school leavers, 75% college/university leavers, 55% apprentices, 50% people from inside the industry, 20% from National Training schemes for young people and 55% experienced people from other sectors.

**Figure 4: Which of the following categories have you recruited from in the last 12 months?**



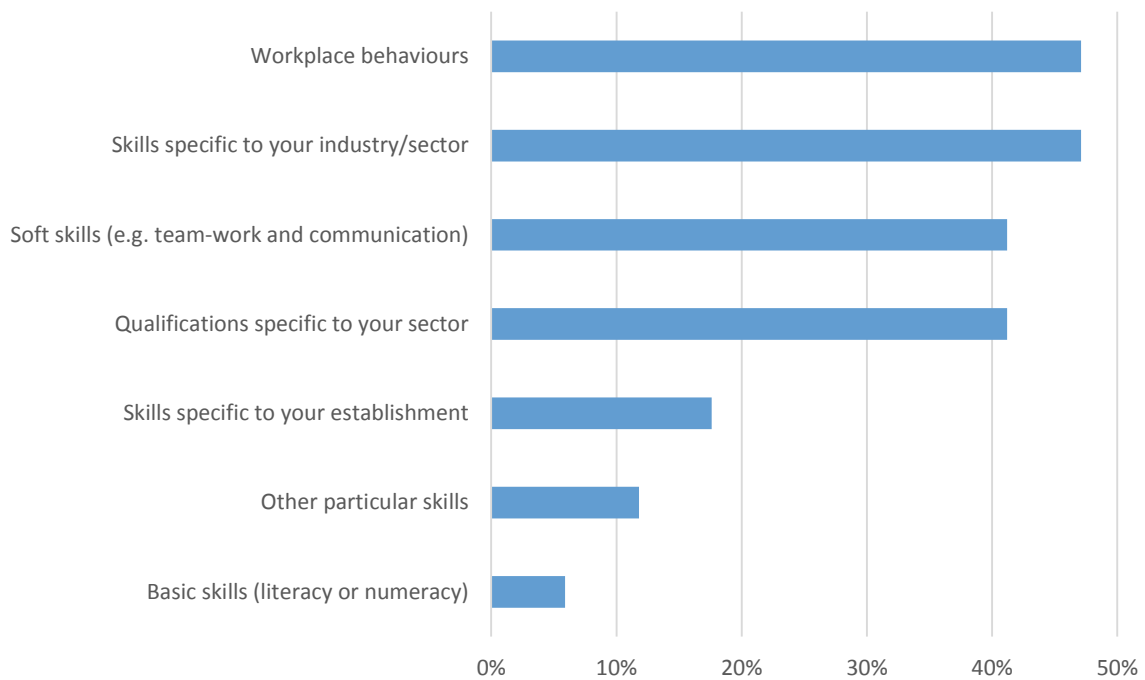
N=20

11.284 Respondents also stated that they had links with an even wider range of organisations. These included Cancer Research, Active Essex and Creative Sport and Leisure and Sport England.

### Skills

11.285 In the next section of the survey we switched our attention to skills. Firstly, we asked, when recruiting to their organisation, which skills have businesses found to be lacking among applicants. 47% said workplace behaviours and skills specific to their sector. 41% stated qualifications specific to their sector and soft skills (such as team-work and communication).

**Figure 5: When recruiting to your organisation, which of the following skills have you found lacking among applicants?**



N=17

11.286 Following on from these, we asked respondents to describe the main kinds of skills that are lacking, including any qualifications specific to their sector that are lacking. Answers included:

- Level 2 coaching qualifications;
- Customer orientated skills;
- Commercial awareness;
- Organisational skills;
- Fundraising skills; and
- General knowledge of sports development and coaching qualifications.

11.287 We asked whether anything else could be done to help businesses recruit the staff that they need. Although many simply said no, there were suggestions for improving provision for coaching courses and the expansion of the coach and leisure apprenticeship programmes in Essex.

**Current workforce**

11.288 We asked businesses what they considered to be the three main skills or competencies required for their workforce (and also what level this applied at). As the word cloud below shows, there was significant emphasis on communications and knowledge of the industry/sector.

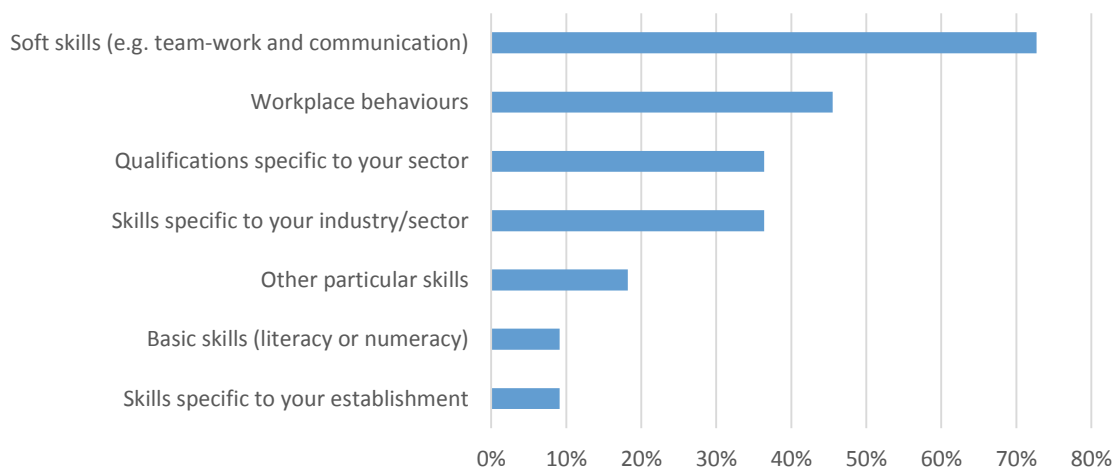
**Figure 6: Word cloud - What do you consider the three main skills or competencies required for your workforce?**



N=11

11.289 We then asked which of types of skills businesses had found lacking when looking to promote or develop their current workforce. 73% said soft skills, with 46% stating workplace behaviours and 37% saying skills and/or qualifications specific to their industry/sector.

**Figure 7: Which of the following types of skills have you found lacking when looking to promote or develop your current workforce?**



N=11

11.290 With regards to what organisations were doing to address these skills gaps, 62% said they were providing further training and 31% expanding trainee programmes.

**Table 2: What is your organisation doing to overcome these skills gaps?**

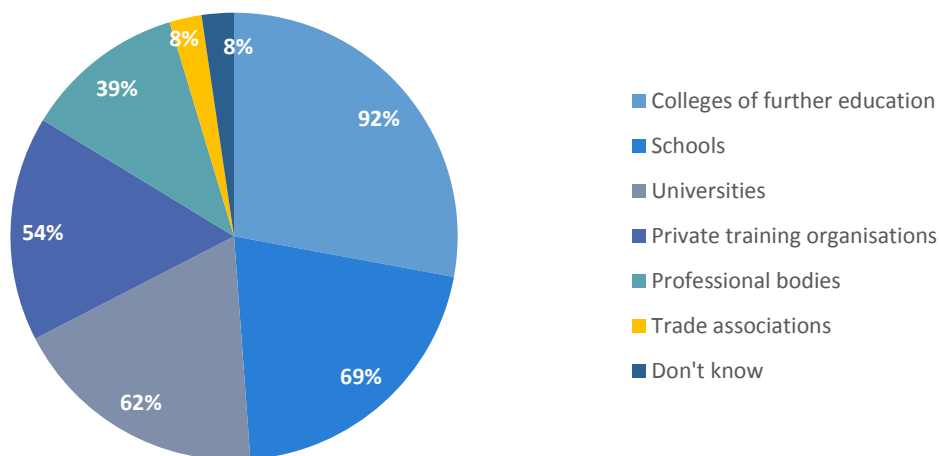
Measures to address skills gaps	% of respondents
Providing further training	62%
Increase/expand trainee programmes	31%
Increase recruitment	23%
Expand recruitment channels	23%
Reallocating work within the company	23%
Changing working practices	15%
No particular action being taken	15%
Don't know	15%
Other	15%

N=13

11.291 We then asked whether staff were undertaking any form of training. From 11 respondents, 55% stated internal training, 46% said apprenticeships, 36% traineeships and 18% said either a foundation degree or NVQ.

11.292 Respondents had a number of links with education institutions. This is shown in the pie-chart below. The most popular were colleges of further education (92%), schools (69%) and universities (62%).

**Figure 8: Does your organisation have active (in the last year) links with any of the following?**



N=13

11.293 Our final substantive question was to what extent any of the listed factors would encourage organisations to provide more training to their staff. The results are detailed in full in the table below. Particular points to note were:

- 58% would definitely provide more training if financial assistance were available to help with the cost of training.



- 39% would definitely provide more training if more relevant courses were available.
- Only 15% would definitely provide more training if better quality providers were available locally.

**Table 3: To what extent would any of the following encourage you to provide more training for your staff?**

	<b>1 – Not at all</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5 – Definitely</b>
<b>If better quality providers were available locally</b>	8%	23%	23%	<b>31%</b>	15%
<b>If courses were more flexible in terms of how they are delivered</b>	8%	8%	8%	<b>54%</b>	23%
<b>If more relevant courses were available</b>	0%	8%	15%	39%	<b>39%</b>
<b>If financial assistance were available to help with the cost of training</b>	0%	0%	9%	33%	<b>58%</b>

N=13

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