Skills Foresight (research) in the Active Leisure Sector

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1. Introduction

In a world of a relative uncertainty, humankind has always been striving for the knowledge of the future, which contains the knowledge of the unforeseen and – in the context of labour markets – which allows sectoral stakeholders to be prepared for a fast-changing environment. More precisely, being aware of future labour market changes, may give competitive advantages to operators, training providers and professionals alike. Moreover, foresight activities provide a platform for research and data collection whilst supporting evidence-based political decision-making.

Active Leisure is defined as *"… a combination of fitness and outdoor-based activities that are generally unstructured and non-competitive. They promote active, healthy lifestyles through activities, events and exercise. They are commonly provided under the direction of qualified animators or instructors so that the activities are tailored to match the abilities of the participants and meet their needs in an enjoyable and safe way" (SIQAF, 2018).*

At the heart of the industry are ~1,000,000 professionals – e.g. Personal Trainers and Outdoor Animators – who need to be properly skilled to work with their 80 million clients. Alongside its economic contribution, the industry also plays a major role in supporting health-enhancing physical activity and promoting healthy lifestyles across Europe.

Despite an anticipated positive development of the sector and an annual growth at 4%, Active Leisure employers face current and future skills shortages and skills mismatches. Based on Cedefop's skills online vacancy analysis tool 'Skills-OVATE' (Cedefop, 2020), the EU Fitness sector alone is seeking to fill 115,000 vacant positions across EU27 whilst employers struggle to find the staff with the right skills set: only 16% of employers find it easy, or very easy to recruit the trainers they want to work in their clubs (EuropeActive, 2019).

Economic innovation, new and emerging technologies, digitalisation, urbanisation and demographic change will largely shape the labour market of the future (Bakhshi et al., 2017). Change requires adaption of businesses and individuals alike. Forms of skills miss-match – where employers cannot recruit staff with the right or enough skills – impend innovation and growth of the sector.

In addition to direct consequences for businesses, a poorly adapted workforce has a wide-ranging impact at the public and individual level. Slowed-down or negative economic developments are associated with reduced tax income and increased public expenditures to compensate unemployment. Having not obtained or maintained a relevant skill set, individuals find themselves at higher risk of losing their job, being unemployed or having difficulties finding a new adequate position. In return, the direct benefit of flexible and responsive (Vocational) education systems are more stable work relationships and related to economic growth such as increased earning and higher living standards. Moreover, Bakhshi et al. pointed out that decent employment "*critically shape how individuals view themselves, interact with others and perceive their stake in society, including their sense of control over the future*" (Bakhshi et al., 2017).

Looking at the positive aspects of flexible and responsive Vocational Education Training (VET) – efficiency, innovation and development – skills miss-matches can turn into a serious financial burden for both the public and for the private sectors. A poorly or wrongly equipped work force harms sectors and can consequently put businesses at risk. Particularly service sectors are at risk in losing their clients due to a lack of efficiency, service delivery innovation.

Skilled professionals – or '*talents*' as named by the ManpowerGroup (2016) – are becoming increasingly valuable for employers, particularly within the context of changing demographics and the shrinking workforce. E.g. Germany's workforce is predicted to diminish by 10 million workers between 2016-2031. Among EU member states, France is the only country that would be able to maintain a workforce in the future to support its economic growth.

The employer organisations EuropeActive (Fitness) and EC-OE (Outdoor) represent the European Active Leisure Sector, with 180-member organisations spread across 30 European countries.

In addition, in 2013 both organisations were identified as representative employer organisations (Eurofound, 2013). In 2018, the two organisations were appointed to carry out a 3-year EU-funded project to develop a sector skills strategy (Blueprint) for Active Leisure. As one of the twelve activities (Intellectual Outputs), the organisations carried out a skills foresight to address following objectives:

- Stimulating discussion about the future and support for long-term thinking;
- Collecting and curating appropriate information by working with key stakeholders and improving shared knowledge in consequence;
- Supporting creation of networks and stimulating common action;
- Providing information to improve the quality of present-day decisions.

The activity lasted from November 2018 to June 2019 and the outputs are contained in this report, as well as in infographics and targeted information papers for the different stakeholder groups: operators, professionals, VET-providers and political decision makers at national and EU-level.

This type of activity is unique to the sector as it is the first time that employer organisations reached out to their stakeholders and collected such data on the future of skills in such comprehensive and structured way. Further to present work, an update on the Skills Foresight for Active Leisure is actually foreseen to be carried out every two years.

This report is structured in three main sections which are separately addressed by the Outdoor sector followed by the perspective from the Fitness sector. Ensuing the introduction, the second chapter presents the methodology employed for the skills foresight. Main conclusions and results are laid down in the third chapter of this report. Hence, chapter 4 outlines the key drivers for change and the direction of the industry, whilst chapter 5 draws on the foresight results and derives concrete measures that the sector can take today to meet future skills and employment demands of the Active Leisure sector.
Finally, the report closes with a conclusion.

2. Methodology

The foresight team of the Blueprint project were split into the sub-sectors of Outdoor and Fitness. Both research teams independently conducted skills foresight activities for each of their sectors between November 2018 and June 2019 and which were reviewed at the partner meeting of February 2020. Progress and results were shared for discussion with the Blueprint consortium on a regular basis.

Although the processes were similar, certain specificities were carried out slightly differently by each of the two sub-sectors. The descriptive of the methodology is detailed below for the Outdoor and then for the Fitness.

2.1. Outdoor

The methodology used by The Outdoor sub-Sector was the following one:

Step 1 – Phone interviews with influencers / key stakeholders based on identified themes:

- EC-OE supply of a list of 50 contacts;
- identification of key bullet points;
- calls from the 4th till the 20th of February;
- report with answers and analysis for step 2.

Step 2 – Direct mail online survey to identify further drivers:

- EC-OE supply of list of 1.315 contacts with key stakeholders;
- mail template created with MailChimp;
- survey created with SurveyNuts;
- report and analysis of the survey results.

Step 3 – Face to face interviews:

- filmed and/or recorded interviews based on the bullet points;
- report and analysis of the issues addressed.

Step 4 – Online Zoom Meeting:

- contact participants for a Zoom online meeting with key stakeholders from Greece, Ireland, France, Portugal and Bulgaria;
- online meeting lasted about 1 hour;
- report and analysis.

Step 1 – Phone interviews with influencers / key stakeholders based on identified themes

A list of 50 contacts, split within 17 different Member States was established; a template was constructed with Mailchimp to contact various key service providers. The e-mails were sent on the 9th of February 2019, leaving the recipients 10 to 15 days to reply and set a date for their interviews. A list of primary questions was established and used during the interviews.

25 interviews were completed, comprising key stakeholders, Private Training Providers (PTP), service providers and training providers (HEIs) during which key issues were raised; each interview lasted for at least 10 to 15 minutes. This step was the jump start of the project; with the answers the recipients gave, the next step was already taking form. The bullet point that were analyzed were then used to build a survey that would be sent to a wider range of key deciders and stakeholders within the EU.

Step 2 – Direct mail online survey to identify further issues

After the analysis of the first step, a survey was built based on the participants' answers. The survey was primarily created with SurveyNuts and was then added to a MailChimp template.

A list of contacts developed over numerous conferences and European meetings was collected from EC-OE. In total, over 1.100 key outdoor stakeholders were contacted. With this survey well over 150 responses were collected in 17 different Member States. The Survey was in two clear parts, where the first part was all about questions regarding the key drivers presented in the last step of the project. The questions of the survey were mostly double sided and were regarding the impact of each topic that were all key drivers.

The first question regarded the technical approach for marketing, booking, purchase, etc.:

- 70% thought that it would have a strong impact;
- 26% thought it would have a moderate impact;
- 4% thought it would have a small impact.

A total of 96% of the respondents think that this driver will have an impact on the Outdoor sector.

The second question concerned the use of technological tools during service delivery, activities, etc.:

- 36% of the respondents thought it will have a strong impact;
- 44% that it will have a moderate impact;
- 20% that it will have a small impact.

We will assume that technology as a general driver will have some strong effect on the future of the Outdoor Sector.

The third question regarded the impact the environmental respect during service delivery such as leave no trace:

- 68% considered that this topic will have a strong impact;
- 23% that will have a moderate impact;
- 9% that it will have a small impact.

In total 92% of the respondents thought that this driver will have an impact of consequent importance.

The fourth question was about active customer education and awareness to environmental issues:

- 50% of the interviewees indicated that this will have a strong impact;
- 38% that it will have a moderate impact;
- 12% that it will have a small impact.

These figures seem to indicate that further types of courses may be imagined as to respond to this key driver, but this is not identified as strongly as the issues raised by the drivers above.

The fifth question was about how human relationships should be taken into account within the business model and how this will affect the sector:

- 39% people expressed the opinion that it will have a strong impact;
- 49% that it will have a moderate impact;
- 12% think it will have a small impact.

The figures show that this driver may not be as of such importance to the respondents; it is one of the lowest 'strong impact' rated; it was also linked to the idea that it should be specifically taken into account in the business model and may have sounded somewhat too 'social' to service providers.

The next question was about the handling of urban children's needs within service delivery:

- 35% considered this issue as having a strong impact;
- 39% considered it will have a moderate impact;
- 21% that it will have a small impact;
- 5% that it won't have an impact on the sector.

It seems that respondents did not all agree on the importance of this driver as most responses were towards a moderate to small impact, with an exceptional 5% considering it should not even be taken into account.

The impact of handling of customers with special needs followed a similar pattern as:

- 35% indicated it will have a strong impact;
- 35% that it will have a moderate impact;
- 26% that it will have small impact;
- 4% that it will have no impact.

This driver is already of a certain concern in the sector, but these answers do show that the enthusiasm for this topic is more limited.

Inclusion of health and fitness issues in the services delivery was the topic of the last question of the first part of the survey and seemed to indicate more concern by those interviewed:

- 48% thought it will have a strong impact;
- 34% that it will have a moderate impact;
- 17% that it will have a small impact;
- 1% that it will have no impact.

Depending on the activity of the respondents, this driver may vary in importance, but it seems that participants think it will have a moderate to strong impact.

The second part of the survey was based on the relevance of various skills, all rated from 'generally relevant', 'relevant and to be developed' to 'essential and to be developed'.

Social and communication skills where rated as follows by respondents:

- 12% think they are generally relevant;
- 16% think they relevant and to be developed;
- 72% think that they are essential and to be developed.

Business and workplace management skills lead to the following evaluation:

- 14% think they are generally relevant;
- 66% think they are relevant and to be developed;
- 20% think that they essential and to be developed.

Animation and group management skills gave the following result:

- 11% think they are generally relevant;
- 28% think they are relevant and to be developed;
- 61% think they are essential and to be developed.

Safety and security skills were rated as:

- 12% think they are generally relevant;
- 17% think they are relevant and to be developed;
- 71% think they are essential and to be developed.

Hard and technical skills;

- 22% think they are generally relevant;
- 44% think they are relevant and to be developed;
- 34% think they are essential and to be developed.

The last question regarding **soft skills** was asking to rank them against hard skills from 0 to 100%, to find out how much the soft skills are required in the delivery of the service in comparison with technical hard skills. The lowest ranking was 30%, the highest was 100% and an average answer was established at 74% of soft skills required during service delivery.

Step 3 – Face-to-face interviews

Over trips, meeting and conferences, interviews were filmed and recorded in different countries such as e.g. in Ireland and in Portugal.

The aim of this process was to listen to the opinions of stakeholders such as training and service providers but also a couple of students who are involved with Outdoor staff and customers. Such interviews were carried out in Tanagh, Gartan, Petersburg, Birr, Burren, Cappanalea, Schull, Kinsale, Trallee, Shielbagan and Dublin in Ireland and Lisbon and the Acores Island in Portugal.

IRELAND:

Nine meetings were organized with Irish Outdoor Education Training Centers (OETC) and interviews were conducted either with the Directors or with the chief instructor. In some cases, both attended the meeting and sometimes more.

These OETCs (for most of them) are part of a network depending on the Ministry of Education and present the advantage of offering both training and employment as they carry out training for instructors during winter periods as well as deliver service to a large range of practitioners in the summer period. Summer groups consist of children, adults and even elderlies for some of them, ensuring a strong experience in service delivery to all ages and all level of abilities.

The combination of both activities (training and service delivery) gives them a strong insight on the clientele's needs as well as immediate comparison abilities between the training delivered and the field competences need/supplied. With regards training delivery, the general trend of these centers is to offer an 'instructor type' training, for those who do, combined with the delivery of National Governing Bodies (NGB) qualifications.

Typical activities are hiking, canoe/kayak, single pitch climbing, mountain biking and sailing. Other activities may be present but represent no more than 10% of the NGBs delivered. They are mainly addressing 'technical issues' rather than 'soft skills' and do produce what is namely known is the Sector as 'instructors'. All interviewees, however, mentioned the need for more soft skills to be included within the training of their staff. The issue of whether this should be done via the NGB, as extra training or within a furthermore comprehensive qualification was not detailed; the necessity was clearly mentioned but definite solutions were not suggested except in 4 cases.

Some OETCs however, namely Cappanalea, Kinsale, Tanagh and Gartan also offer or are in the process of finalising a QQI[1] 5 and/or a QQI 6 course (EQF 4 & 5) aiming at addressing the issue of providing a broader, more 'holistic' training to NGB qualified instructors, including soft skills. In terms of service delivering, the fact that other competences were regularly required came out often.

There also were interesting discussions on the presence in Ireland of a strong tourist clientele from many different origins and the consequent necessity for both Outdoor instructors and leaders to dispose of competences linked to visits, in their cultural, gastronomic … general aspects.

The OETCs are often supplying private service providers with their trainees and have a good relationship with them; their views seem to be shared by most private service providers; these were not interviewed.

Some programmes are offered at bachelor and master level by higher education institutes.

[1] https://www.qqi.ie/

It could be said that the limit to an 'all soft skills' aspect of the training is seen by many employers precisely in those programmes. Although they sound interesting, many commented that they cannot replace the 'hard skill training' of an NGB. One interviewee summed it up in a short comment: "*Between an employee with 2 or 3 NGBs and one with a dedicated bachelor, I would still employ the NGB holder*".

The latter also makes sense since e.g. rafting, mountain biking and climbing are not just about intellectual/psychological issues.

All interviews lead to this conclusion and even the Irish sport authority 'Sport Ireland' did not profoundly deny this issue which corroborates a well-known situation within the EU.

PORTUGAL:

In Portugal, 5 interviews were conducted mainly with service providers. Interestingly, 2 of them were also involved in the higher education environment and had consequently a good knowledge of both aspects e.g. training and service delivering.

Although local clients are indeed concerned by the service delivery, there is a strong contingent of foreigners visiting Portugal each year and indeed, using Outdoor services. This requires a broad linguistic approach of the service, whereas English is not the native language for the vast majority of Outdoor employees in Portugal.

Another aspect of the Portuguese service delivery sits in the strong presence of cultural and historical issues and their combination with the more 'classic' Outdoor half day trip/service. This is also often combined with gastronomic / wine issues either as part of the service or as a strong presence in the service delivery environment.

Most discussions lead to the enhancement of the 'soft skills' issues and their importance in the training, but an even further dimension was even addressed as the need for 'social skills' was clearly analyzed. This was further explained to mention that social skills concerned skills beyond group management and/or entertainment technics during the service delivery, but also regarding 'untypical' outdoor service delivery.

Social behaviour organised round key topics like history, culture, gastronomy and other similar or related topics seems to have a particular importance in Portugal, compared with other western European Member States. The aspect of immersion within local life/lifestyle offered to tourists during the course of delivering the service or as a complementary service to the core Outdoor service also appeared to be of prime importance to various interviewees.

Step 4 – Zoom virtual space

An email was sent to 5 contacts in the chosen Member States so that 2 Zoom virtual meetings could be organized in order to spend some time talking about the issues and findings of the previous steps. The member States selected were, Greece, Ireland, France, Portugal and Bulgaria because they were considered as the most pertinent. After the first meeting it was anticipated that individual meetings would be more appropriate for this step.

Individual meetings were then scheduled over 2 weeks and 5 meetings were completed. The end results were very important because they helped implement the results collected previously. During the meeting, the key drivers and topics regarding social skills were discussed, most of the participants added information from their personal experience and/or general knowledge and opinion on the matters.

2.2. Fitness

Focus, objectives & research questions – The Active Leisure Skills Foresight 2019 activity was concentrated on the systematic gathering of information, a vision-building process, and action-orientated outcome. The main rationale for the Foresight is to help meet future skill needs by providing sectoral stakeholders (employers, employees and professionals) and policy makers with relevant information. Consequently, the Blueprint project aims at supporting evidence-based decision-making by providing skills intelligence.[2]

A **Foresight Study** could be defined as a systematic, future intelligence-gathering and medium to long-term vision-building process aimed at identifying opportunities and areas of vulnerability to assist present-day decision-making. The key element in foresight activities is that 'they are action-oriented, in the sense that the final aim is to influence, shape and act upon the future. [...] Foresight processes and outputs should be oriented towards contributing to, facilitating or guiding the decision making process' (European Commission/ JRC 2005).

In order to refine the broad topic of Foresight research, the Blueprint team decided to focus on a Foresight scope of 11 years (2030) and defined following research questions:

- What will the Fitness Sector look like;
- How do you see employment and related roles changing;
- What kind of general and specific skills will we need;
- What does it imply for future education and training?

Literature and statistical review – In preparation of the Foresight activity, a range of scientific literature was consulted. This exercise supported the wider understanding of the 'Future of work and skills' topic and formed the basis for the methodology. Key literature for the development of the methodology applied was published by the EU institutions (CEDEFOP, EFT, JRC, EUROFOUND) and the International Labour Organisation (ILO) and consulted by the sector. A full list of the selected literature can be found in the reference list at the end of this report.

Engagement of key stakeholders – A key role in this process was held by the Sector Skills Alliance for Active Leisure, which brings together national and European sector representatives (employers & employees), public & private education and training providers, public & private universities and research centers and further sector representatives.

[2] Skills intelligence is the outcome of an expert-driven process of identifying, analysing synthesising and presenting quantitative and/or qualitative skills and labour market information. These may be drawn from multiple sources and adjusted to the needs of different users. To remain relevant, skills intelligence must be kept up-to-date and adjusted when user needs change. This requires the expert-driven process to be continuous and iterative. (Cedefop)

Consequently, the involvement of sectoral stakeholders from the European Active Leisure sector was necessary to actively involve the industry, gather data and obtain peer-review results.

Time horizon – The skills Foresight was structured in four phases over a period of 8 months (November 2018 and June 2019) (Figure 1).

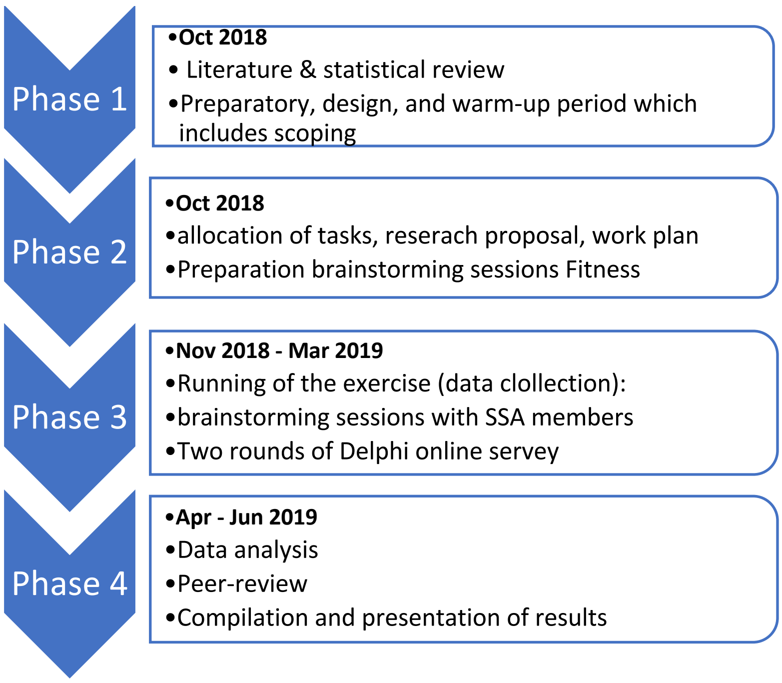

Figure 1. Research phases Skills Foresight for Active Leisure 2019.

Phase 1 – In the preparatory phase, the team reviewed existing literature to gain a deeper sense of the work and skills future and to develop the right methodological approach for the Foresight. This phase closed the draft of the research proposal.

Phase 2 – Shortly after phase 1, the team allocated the tasks for the Foresight exercise during phase 2. Primarily, brainstorming sessions were prepared and the timeline and logistics for the Delphi surveys sorted.

Phase 3 – During the implementation phase, the brainstorming session was organised as part of the fringe programme of the 9th International Standards Meeting (ISM), 14th November 2018 in Warsaw, Poland. The session was dedicated to exploring topics related to the future of work and skills in the European Fitness sector 2030. The selected expert group of participants was composed of employers, professionals, and experts from the VET and HE sector from across the EU. To meet the criteria for the Foresight exercise, it was crucial to assure year-long experience and expertise by the participants.

Brainstorming sessions & fitness trends – the session aimed to be as explorative as possible to allow "out-of-the-box" thinking and consideration of every idea. Therefore, participants were asked to brainstorm two given questions individually followed by discussion and plenary. In addition, ISM participants had the opportunity to share their thoughts and ideas on strengths, weaknesses, threats and opportunities (SWOT) related to the future of work and skills on a brainstorming wall with sticky notes. Finally, 34 participants replied to a questionnaire which focused on recent fitness trends. All replies where analysed, presented and discussed with the Blueprint project partners.

> **The Delphi method** is based on structural surveys and makes use of information from the experience and knowledge of the participants, who are mainly experts. It therefore yields both qualitative and quantitative results and draws on exploratory, predictive even normative elements.

Delphi questionnaire – Based on the results of the brainstorming sessions, a Delphi questionnaire was designed. Delphi involves making judgments in the face of uncertainty. The people involved in Delphi studies only give estimates. Therefore, Delphi studies always tackle issues formulated in statements about which uncertain and incomplete knowledge exists. The experts involved need to be selected on the basis of their knowledge and experience so that they are able to give a competent assessment. They have the opportunity to gather new information during the successive rounds of the process (JRC….).

For the Foresight exercise for the Fitness sector, the questionnaire was distributed via Lime survey to a list of 152 experts:

- Vocational Training Providers,
- Government/agency/NGO/EU Institution,
- Operator (employer),
- Other,
- Researcher/ HEI,
- Other fitness professional,
- Personal trainer or higher skilled fitness professionals,
- PES.

Round 1 – active 13 days (19/02/2019 – 3/03/2019). A reminder was sent a couple of days before closure of the survey.

- this led to 54 replies (response rate ~ 35,5 %).

After completion of the first round of the Delphi online survey, the collected data was reviewed. Particularly open-end questions were formulated into statements in the second round for review and verification. Clear replies were not included again for verification in the second questionnaire. Consequently, the second questionnaire was shorter in lengths.

Round 2 – active 14 days, 11/03/2019 – 24/03/2019. A reminder was sent a couple of days before closure of the survey

- 50 replies (response rate ~ 30.4 %).

Response rate is considered to be high with external respond rates usually ranging from 10-15% (internal respond rates 30-40%). The participation rate in round two was expected to be slightly lower than in the first round (Table 1).

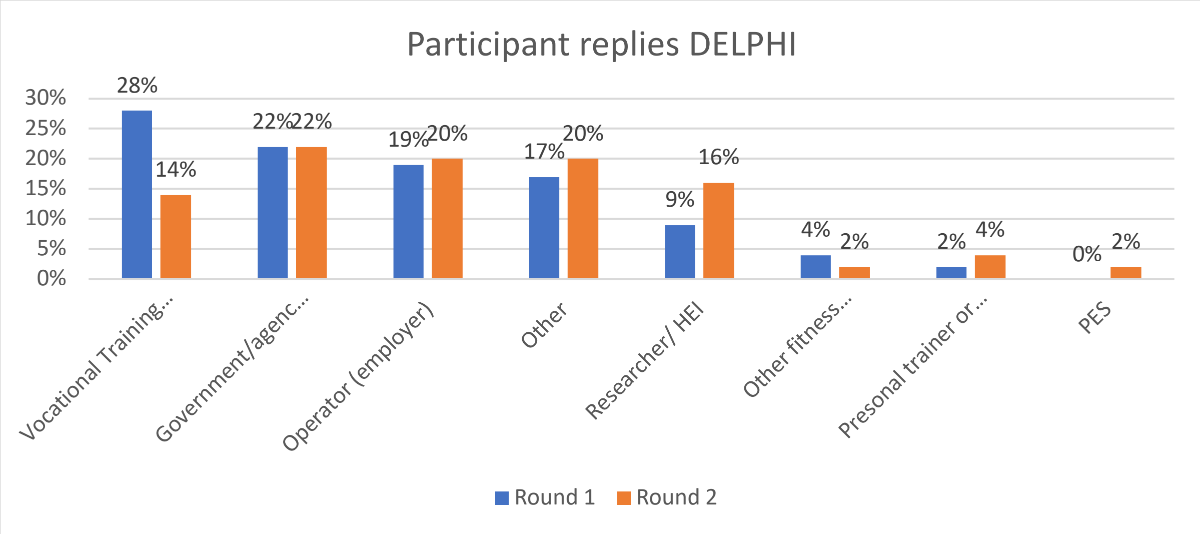

Table 1. Participation rates (%) in Delphi round 1 compared to round 2.

Phase 4 – During spring 2019, the research team reviewed the final Delphi results and presented the results to the Sector Skills Alliance sub-group for peer-review in April 2019. This process was necessary to gain additional insight and reality check. In addition, the results were presented to the Blueprint partners in June 2019 and the fitness Foresight report completed.

Limitations – Similar to every skills Foresight activity, there are limitations to the method. As the method requires the consultation of sectoral experts in order to obtain and peer-review data, the information of the same is reflected in the results. Delphi involves making judgments in the face of uncertainty. The people involved in Delphi studies only give estimates (JRC…). Consequently, the results of the Foresight are mirrored by experts' opinion which is the common method for Foresight work. But the information is not alone standing and analyzed in a broader context of the future of skills and employment.

Furthermore, it is crucial to understand the characteristic of vision building as part of the Foresight: a skills Foresight activity provides the opportunity for information exchange, stakeholder participation and can contribute to evidence-based political decision making. Hence a skills Foresight can be used to formulate a shared vision through consensus building.

3. Skills demand and employment in the Active Leisure sector: current situation

3.1. Outdoor

The current situation relating to employment in the Outdoor sector is somewhat paradoxical, considering that for the moment, most service and training providers seem to be training and employing outdoor animators who dispose of more than the required and necessary technical skills, whilst they seriously lack competences in soft skills and, as brought out by an Irish colleague during one of the zooms meetings, in 'emotional intelligence'.[3]

Soft and social skills are without any doubt of true importance during service delivery, according to all participants in the process described herein. Another quote on this issue, this time made by a couple in charge of a company in Portugal delivering mountain bike visits of Templar sites and castles, was, when asked to describe the type of skills they were anticipating their staff to possess: *"They can all bicycle well enough, but I need them to have solid social skills in order to adequately handle our clients".* This quote reflects particularly well the general consensus on the topic across the EU.

Indeed, no matter how well an animator can mountain bike, the point is rather missed in terms of service delivery if he or she can't exchange with their customers on e.g. Templar and Portuguese historical issues relating to the sites they are guiding them through.

Over each step of the project it became clearer that employers are looking for outdoor animators who do possess such soft skills, but unfortunately have to settle and 'do' with employees who have only – or mainly – acquired technical skills; this is due to the fact that there are not enough outdoor courses in the EU that provide the soft skills truly required.

When they actually do exist, they are often delivered by Higher Education Institutions (HEIs) at EQF Level 6, which corresponds to a management type position and not any more to an animator job. Furthermore, and most of the time, such courses correspond to management skills in the sport sector which requires different skills than those required in the Outdoor sector.

The average EU training situation of outdoor animators can be summed up as a dual choice for employers who, in a nutshell can:

1) Employ technicians at EQF level 3 or 4 holding up to 3 or 4 NGB (National Governing Bodies) qualifications, with very little knowledge and understanding of customers' requirements on the one hand, or,

[3] Further documentation on the emotional intelligence concept can be found on: https://www.weforum.org/agenda/2017/02/why-you-need-emotional-intelligence

.

2) Employ people with a Bachelor' degree at EQF 6 that provides management knowledge to future managers (who will no longer be Outdoor Animators and who have been trained on matters that are not relevant to the employers' needs) on the other hand.

The missing element consisting of an Outdoor Animator trained both on relevant technical issues and on adequate and pertinent soft skills and who still remains an animator (and does not become a manager) is so rare that it leaves employers in front of the basic choice between employing a pure technician or a manager, who is no longer an animator!

Another Irish colleague, who was a former Outdoor service provider and now involved at senior level with Irish NGBs, summed up the situation in these terms: "*Yes, the choice is either an NGB holder or an HEI-trained manager and as an employer, I would always have employed the NGB holder as at least I was sure that he could properly kayak my clients around".*

Although the choice in given circumstances is understandable, the skill gap and the employers' need for a new type of training and a new staff profile clearly appears.

It must be highlighted that present statements and summary of the training situation in the Outdoors does not mean or even suggest that trainings on offer either through the NGBs or through HEIs are not good. In fact, according to most interviewees, NGBs across the EU are described at providing excellent technical training which actually fits most sporting clubs' needs, activities and requirements as well as most EU HEIs are training very good sports managers with all the right management skills and at the right EQF level, that fit the need of sporting structures…

The problem is therefore not so much the quality of what is on offer across the EU, but the adequacy of the learning outcomes reached by students and the competences really expected by the outdoor employers.

Furthermore, the quality of the existing training on offer is historically established in reference with the needs of the wider sport sector which, in terms of technical abilities and group management corresponding skills, has very different requirements to those of the Outdoor sector.

Indeed, the Outdoor sector does not offer technical training, technical performance and/or competitions to its clientele and hence, Outdoor Animators do not require the technical level of expertise required from sport coaches and trainers. As far as soft skills are concerned, the Outdoors does not offer services to racers or competitors but to holiday makers and tourists: with regards 'group management' in particular, the Outdoors caters for paying customers and not for club participants. As a consequence, the Outdoor sector's commercial companies employ seasonal paid animators, while not for profit structures from the sport sector mostly use the services of volunteers.

Therefore, conditions of service delivery are extremely specific to The Outdoor Sector and they deeply impact the context of qualification engineering.

A classic example regarding the difference between qualifying in 'sport' and qualifying in the 'Outdoors' is given by French training relating to "*Certificats de Qualification Professionnelle*" (CQPs) which are issued and delivered through Sport Sectoral Social Dialogue. Typically, these CQPs correspond to jobs and positions within not for profit sports clubs, like training kids 3 hours on a Wednesday and Saturday afternoons, but offer prerogatives that are legally limited to 360 hours a year.

A CQP holder – very similar to an NGB qualification holder – is therefore not only a technician, but a technician that can only really operate in-not-for-profit organisations such as sports clubs and at an average of only 7 hours a week. Such an animator however well trained, cannot be employed in a commercial Outdoor setting where the weekly workload is typically 40 hours.

This example demonstrates that the needs of the sport sector (which includes high numbers of volunteers) although highly respectable, are clearly not compatible with those of commercially based Outdoor sector.

The proximity of the Outdoor sector with the sport sector probably explains why there has been a confusion regarding required competences; however, performance and result-seeking-competition-basis of the sport sector are concepts which are alien to the Outdoor sector clientele.

As a recurrent matter, training and service providers also highlighted the fact that courses never truly specify the actual competences that an animator will obtain. Instead they only focus on how many hours they will deliver. The latter does not seem to be the way forward as courses are more and more identified through the corresponding learning outcomes rather than simple content, let alone sole duration.

On the matter of current situation relating to skills demand in the Outdoor sector, a strong importance, all through the different steps of the project, was given to social skills and emotional intelligence which are considered in high demand. It seems that the problem, nowadays, is that Outdoor Animators, although qualified in their activity, are still lacking in the social/communication skills that are required to properly handle Outdoor customers.

3.2. Fitness

The Fitness industry is a global phenomenon and impacts on the everyday lives of millions of people. With the growing threat of obesity across all ages in large part caused by lifestyles that are increasingly inactive, health and fitness is a hot topic. Governments across the world are supporting initiatives that espouse the benefits of being physically active and well-known international companies provide support and sponsorship to these programmes.

The Developing, Skills, Foresights, Scenarios and Forecasts report produced by CEDEFOP in 2016 highlights that the "*European Union (EU) places great emphasis on skills anticipation and better matching.*" (Cedefop, 2016) This is reflected in the Europe 2020 strategy and, in particular, the Agenda for new skills and jobs (European Commission, 2016), which recognises that anticipation and matching approaches and methods can help develop a skilled workforce with the right mix of skills in response to labour market needs, in a way that promotes job quality and lifelong learning. The EU Skills Panorama, launched in 2012, supports the effort to provide better data and intelligence on skill needs in the labour market (Cedefop, 2012).

In 2019 Europe Active and Deloitte published the 8th edition of the European Health & Fitness Market report (EuropActive, 2019). The report outlined the current situation in the European Health & Fitness Market and the key findings were:

- the European Health and Fitness market grew by 1.2% to EUR 27.2 billion in 2018;
- market growth driven by 4.6% increase in the number of clubs to 61,984 across all EU countries. Total increase in fitness club and gym members of 3.5% to 62.2 million;
- average monthly membership fees remained relatively stable;
- the top 10 European fitness operators increased their share of the European fitness market from 11.7% to 12.1%;
- average revenue per member continues to decrease, mainly due to the rise in low-cost operators;
- within the EU Germany has the largest number of employees with approx. 212,000 (22.7 per club) with Spain second with 74,000 (15.8 per club) (see table 1 below);
- in 2018 there was a total of 24 merger and acquisition (M&A) transactions identified in the European Fitness Sector.

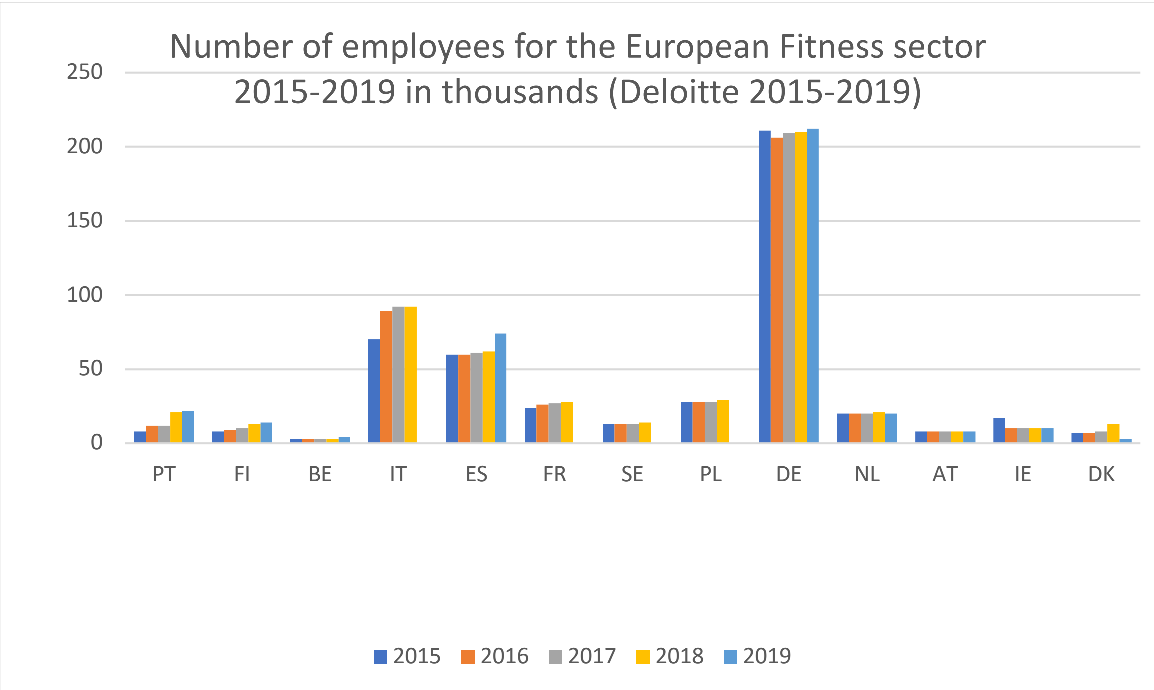

Table 2. Number of employees for the European Fitness sector 2015-2019 in thousands (Deloitte 2015-2019)

The conclusions from the Deloitte 2019 Market Report is that the European fitness sector is in a healthy position and continues to grow, mainly driven by the increase in membership of the low-cost gym operators. The natural consequence of this is that there is a continuing increase in employment opportunities. The overriding trend across Europe continues to be "*segmentation and personalisation – listening to what members (and potential members) want and helping them to track their results and achieve their goals – and approaching this challenge with the aid of digitalisation.*"

What this indicates in terms of the skills required in the fitness sector, is that it will involve softer people skills and the harder skills of using technology effectively.

The 2019 Employer Skills Survey Results commissioned by Europe Active involved responses from over 1000 fitness clubs across Europe. (EuropeActive, 2019) This survey found that:

- only 16% of employers find it easy, or very easy, to recruit the trainers they want;
- the most important skills that an employer looks for are personal/communication skills (97%) and customer service skills (85%);
- there was a drop in the number (36%) of employers that said digital skills were important or essential;
- there was a drop in the expected skills of trainers for maintaining, cleaning and repairing fitness facilities 30%;
- there is a continuing trend for employers to provide training to new recruits (74%).

Overall, the conclusions from both the Europe Active Employer Skills Survey (2019) and the Europe Active Deloitte Report (2019) indicate that the main skills gaps for personal trainers remains in the areas of **inter-personal skills** and the ability to provide specialist services, personalized to an increasingly diverse customer base.

4. The drivers for change and direction of the industry

4.1 Outdoor

As shown above, there are clearly 3 drivers that appeared as being substantial for the growth of The Outdoor Sector. These key drivers are Technology, the Environment and Communication.

4.1.1 Technological issue

After the analysis of the result of the respondent's opinion, it appeared that technological impact would make a great change and that this driver needs to be addressed.

With 97% of responses saying it would have some kind of impact, technology has been identified as essential. What participants mostly questioned, was the impact of technology on the sector and how key actors will have to find a balance to include technology without making it a priority or indeed without 'de humanising' the service. As Tomas Aylward (lecturer at IT Tralee) said during an interview: *"Digital detox is important; staff need to use technology purposely and in conscience"*.

Of course, technology is of importance, but an overuse of technology may bring a lack of social and human relationship, which in turn could impact the credibility of the sector.

Technology plays an increasingly influential and important role in outdoor activities. The last 10 years in particular, have seen an explosion of virtual and technological developments, ranging from clothes to equipment such as signaling devices, protective gear and communication, clothing, safety and/or comfort.

Each of these areas has resulted in a greater use of the outdoors, differing expectations and changing needs in public policy making.

For example, technology has increased access and transportation through improvements in overland travel such as snowmobiles and off-road vehicles (ORVs). These machines have allowed visitors to get further into remote areas faster and with less effort. Also, comfort in the outdoors has been substantially improved through lighter weight, more effective clothing, tents, boots, etc. Reduced weight coupled with greater effectiveness has resulted in more people, within a greater age range and across more ability levels, to get into extremely remote or challenging areas.

Technology has worked in two ways that relate to safety. First, improved technology has increased the level of safety available to both individuals and groups: equipment is stronger, lighter, and more versatile, though in some cases higher levels of skill and expertise may be necessary to use it.

As a consequence, new kinds of behavior have appeared such as risk taking and 'experience collecting' with a view to disseminate on social networks and place 'ticks & flags' on a world map.

The 3 deaths that occurred on Mount Everest over the spring and the new regulation in 2019 linked to access to Mont-Blanc last summer, are probably a direct consequence of modifications in the clientele's behavior, consequent to technological evolutions, as people are generally not fitter than they were 10 years ago.

Easier access due to better knowhow of the terrain, access to meteorological, topographic and background information, combined with more efficient equipment and an unprecedented desire of the population to turn one's life into a permanent 'exposed scenario' is leading to a new type of risk taking and consequently to a new type of risk management.

Places once reserved to a handful of connoisseurs are rapidly becoming worldwide known due to the internet, which also participates in changing habits and impact on the environment. It is therefore hardly surprising that, in the coming years, technology is considered as having a potential impact on the sector by 96% of survey respondents.

4.1.2 Communication

Communication is the area experiencing the fastest technological growth. With the advent of GPS units, 36-mile radios, PLBs and EPIRBs (personal locator beacons and emergency position indicating radio beacons), satellite telephones, smart phone apps, and increased cellular coverage, technology now allows Outdoor leaders to know exactly where they are, how fast they are moving, and in what direction, and how to signal for help.

This may, however, also lead non-professionals to believe that they have gained knowledge; but electronic knowledge may not replace experience and in turn, lead to new types of risky behaviors.

Of course, there are further problems and dangers that come with the use of technology as it sometimes does not operate as one would want it to and one may not always be aware of how to use such devices.

Historically, information was often obtained through word of mouth, asking the area ranger, or finding a map or a brochure. Now, information is usually accessed via the Internet, automated telephone exchange, or guidebooks. Again, this ease and convenience of accessing information generally leads to increases in use, particularly in areas that have not seen much use because of their remote or difficult location.

This increased use of electronic devices, however, does not come without a price, namely for visitors finding themselves in situations far more challenging than their personal skill or knowledge levels can accommodate. Added to this, they are often in locations so remote that no one can easily get to them. Technology can also create a deceptive bubble of safety.

Other related problems may occur, and it is probably the comment made by a mushing/dog sledging service provider in North Finland that illustrated best the changes recently occurred in communication and technological issues; he quoted: “*Season went well although we had to dramatically change the service pattern by accompanying our tour leader with a psychologist. Why? Because our clients find it so silent at night that they cannot sleep, but most of all we don’t have any Wi-Fi beyond the North Pole circle and our customers lose the plot after 2 days without Internet”.*

In sum, technology has contributed to a number of benefits to both outdoor activities and participants. It has increased comfort and safety, improved access, enhanced communication, and enlarged the information base from which people make decisions. Injured participants can find themselves in situations that require search and rescue (SAR) or other forms of assistance from managing or government agencies. In such cases, technology serves to increase demands on the environment and land resources rather than decreasing them.

The communication permitted by this new technology certainly provides new opportunities and facilitates access to the outdoors, but it may also generate a new type of risk taking and risk management that is still unfamiliar.

The Sector will definitely need to investigate and address these issues in the coming years.

4.1.3 Environment

With increasingly strong messages around climate change it seems that the environmental issue is inevitable.

Educating clients might not be considered to be the core business of Outdoor providers, which seems fair, knowing that the sector is an entertainment-based field and not an educational sector. Nevertheless, advise and recommendation may be provided to interested customers. However, raising awareness towards the respect of the environment is of concern and indeed, 92% the respondents think it should have an important impact on the outdoor sector.

It seems that the Outdoor sector most probably should be one of the first sectors to be impacted by the phenomenon of climate awareness. Over the last few years, climate change has been highlighted by numerous companies and is an issue that has also gone viral on the Internet.

The Outdoors is an attractive sector for tourists from all over the world; therefore, it may also be in the next few years, affected by the phenomenon of 'flight shame', that has already started in Sweden and which concerns people who are now aware that taking the plane pollutes in a great way and that any action taken against such an issue is to be considered.

Over the step of the phone interviews, the interviewees were also concerned by the increasing global warming. Some even considered that it was the responsibility of Outdoor leaders to raise awareness with the general public and that "*we are in a crisis that has never been treated as a crisis*".

For a better health and for a generally better life, the Outdoor sector should therefore also reflect on establishing ways to raise awareness regarding the environmental impact of the activities offered and actively participate in acting against such a threat.

As for 'communication' – within the business or not – 'environmental awareness' it is of course key to its success.

Being able to communicate with partners and customers can be a true motivation, which plays a role in the productivity of the business itself. Good communication on environmental issues brings confidence and trust between Outdoor Animators but also between Outdoor Animators and their clients.

4.2 Fitness

The future of how we will work and live is shaped by structural changes. The World Economic Forum (WEF) pointed out the main dimensions for labour market changes which will open a new era of work: the Human Age. The new labour market will be driven by human capital or talents which will become the differentiator (SCHWAB, 2016).

According to the WEF, the shift is mainly driven by demographic change, greater individual choice, the ongoing technological revolution and client sophistication. In accordance with EuropeActive's skills Foresight 2019, the drivers shaping the fitness sector 2030 vary slightly from the ones the WEF has identified. Based on the experts consulted for the Foresight exercise, the expectations for the future fitness (employment) market are more specific to the sector.

Foresight 2019 has identified four main drivers for change in the fitness sector:

- health and demographics;
- digitalization and technologies;
- social dimension and communities;
- economy and innovation.

These dimensions of change are the result of brainstorming sessions using Grounded Theory to build up categories (Bryman 2012, pp. 567) based on the data. The results were verified through two rounds of Delphi surveys (February-March 2019) and peer reviewed by a group of industry experts (April 2019). The categories are believed to shape the way how operators, professionals and clients will work, exercise and live in the next decade (2020-2030). Accordingly, each subject (operator, client and professional) will be presented below in the context of the identified dimension. However, it must be noted that dimensions cannot be clearly differentiated as they partial merge into each other.

4.2.1 Health and Demographics

94% of questioned experts claimed that 'Health and Demographics' is the dimension with the strongest impact on the future of the European fitness sector. Foresight participants focused on the group of clients and how health and demographic is expected to change within this group. Consequently, a shift in skills is expected to address changing clients' needs.

The WEF covered this driver for change (demographic change), however, it was rather seen from the perspective of the workers: due to the strong shift towards ageing societies, there will be a shortage of human resources which will lead to an increased competition for talents. Moreover, the world of work will need to think of new forms of work and retirement, e.g. part-time retirement models, later retirements and provision of training to keep people's skills relevant and to retain the workers with greater potential.

The clients – With the change in demographics towards more ageing societies, the overall health levels are expected to change as well. Due to the expected higher prevalence of (non-communicable) diseases in older age groups, consumers' needs will be shifting increasingly towards health prevention and recovery.

The professionals – Fitness professionals are expected to extend and maintain their skills set in the future to meet clients' changing demands and focus more on training to address special populations groups. Moreover, Foresight participants mentioned the possibility for stronger cooperation with the health and care sector in terms of professional cooperation and public funding, e.g. financial support for fitness club subscriptions.

4.2.2 Digitalisation and Technologies

Nearly 90% of the participants foresee a strong or moderate impact of Digitalization and Technologies (D&T) on the fitness sector between 2020-2030. It is one of the most obvious and most frequent mentioned drivers for change in the Skills Foresight and the WEF lists the 'technological revolution' as one of their four selected drivers for shaping the future labour markets which is similar in scope to the ones identified by EuropeActive. However, there are many layers to this driver when viewed on from different angles.

D&T is already changing the way how people work, and the extent varies from a new tool to facilitate a task to a complete automation of a process, resulting in the replacement of the human workforce. Whilst there is the omnipresent fear of increased unemployment due to technologies, particularly due to the emergence of Artificial Intelligence (AI), D&T bears a great potential for the creation of new jobs and forms of work. Looking back, new forms of work always outnumbered the loss of employment due to employment market changes. For instance, it is not only the development of those technologies (research & development) but also the knowledge of using and maintaining technologies. Moreover, new forms of work such as crowed working or the sharing economy would not have been thinkable without the digital developments of the past decade.

In the context of the fitness employment market, Foresight participants shared the opinion that fitness professionals

1) will use technologies as a tool, e.g. to track and visualize clients' performance, etc., and
2) will need to facilitate the (overflow) of information for clients.

The latter refers to the fact that information will be – as it is already today the case – increasingly available to clients and professionals will need to sort this information for the client, thus, obtaining an additional role as an expert in the field of physical activity.

The clients – Alongside the expected impact of digitalization in the form of new technological gadgets, Foresight participants implied wider and behavioral related changes in the society: as information is becoming more accessible and available, it will be increasingly critical to be able to filter and process this information. In addition, Foresight experts consider tracking and tracing at private level will continue to increase. As it is already the case today, wearable and digital reminders will continue to become part of our lives, observing our heart rates, sleep and daily steps. In addition, digitalization and technologies will allow individuals to train by themselves with the promise to exercise whenever and wherever they want.

The professionals – Progressing digitalization and emerging technologies will change the way fitness professionals will work in the future. The amount of individual health information and the need to deal with it will create a new role for fitness professionals where clients will refer to them as experts. In this context, it was also mentioned that professionals will progressively use technologies to support the evidence-approach to training. Recording clients' nutrition, training and behavior will allow professionals to analyze and visualize progress whilst maintaining their expert position.

The use of technology when working with clients, e.g. apps, was perceived as increasingly important by the skills Foresight participants.

The fitness operators – On one hand, digitalization and technologies give professionals the opportunity to work more evidence-based and individualized. On the other hand, it also creates the base for increasing self-instruction and self-service in the fitness sector. However, it was pointed out that both approaches – served and self-served – will coexist. Within this context, fitness clubs are expected to have the facilities to address instructed and self-instructed clients.

The last-mentioned perspective on digitalization and technologies is the 'counter-culture' of digitalization: two out of three experts believe that it is likely to extremely likely that there will be a counter movement to digitalization. Nevertheless, it was not perceived as a major trend but as a movement, which might coexist with the mainstream. The 'counter-culture' might want to move away from technologies and digitalization towards less structure, less gadgets and tracking whilst putting fun in focus.

4.2.3 Social dimension and communities

The topic relating to 'social dimension and communities' has been selected as having a moderate to significant impact on the future of the fitness sector by 81% of the experts. This dimension was not found to be majorly significant but was rather placed on the second rank. Surely there will be an impact, however, although it was not perceived as a major dimension to the experts.

The clients – Increasing levels of loneliness, particularly in individual societies (opposed to collective and more traditional societies) will become a major societal challenge. With loosening family structures, changing demographics and longer retirement periods, maintaining social and mental well-being will be crucial. With retirement, for many people the social dimension of employment will be missing. Therefore, clients' needs are expected to change in the future with an increasing demand for the 'social experience'.

The professionals – Taking into consideration changing social situations and demographic changes, Foresight experts pointed out the great need for inter-personal skills for fitness professionals. While exercising, clients are expected to look for the social experience in the future and therefore, the creation of communities will gain crucial relevance. Service minded staff with efficient communication skills will be more important than ever and a highly personalized client relationship will be key to retain customers, e.g. greeting clients by their name when entering the gym is expected to become a standard practice in future fitness places.

The operators – Foresight experts saw in the increasing loneliness in future societies a gap which could be addressed by fitness clubs. As mentioned in the above section, both approaches of self-serviced and personalized fitness clubs are expected to coexist.

Nevertheless, a higher number of experts (85%) believed that fitness places in 2030 will be personal and served whereas less experts (52%) commented that self-serviced clubs will be the major trend in the future. Thus, fitness places are assumed to become (more than today) a place to meet and socialize. Especially in the context of demographic change and retirement, the club will provide an opportunity for members to socialize once being outside of the employment system. In this context, fitness places might support opportunities for clients and might want to address changing expectations and demands (e.g. events).

4.2.4 Economic dimension and innovation

Growing economies and innovation will shape the future of the sector. Similar to the previous described dimension (social dimensions and communities), this dimension was unanimously identified as being significant (74%); nevertheless, it was not ranked as having the strongest impact.

The clients – It is expected that both clients' needs, and expectations will be changing. The latter will be highly driven by innovation. With increasing competition for clients, a change in commitment and shifting attitudes is expected.

The professionals – Fitness professionals – similar to other sectors – will have to enter a competition with smart and digital technologies and demonstrate the added value for paying a person – and not purchasing an application instead. Therefore, most experts emphasized the need for maintaining the individual skill set and professional specialization in order to remain competitive. Hence, it was expressed that fitness professionals are expected to work both online and offline, digital skills will gain importance to manage technologies and apps as work tools.

Often driven by crowd working platforms such as Uber or Airbnb, online booking and rating of professional services were identified as highly likely to increase within the next 10 years. In this context, fitness professionals will need to be increasingly (self-)marketing and digitally knowledgeable.

Operators – With an expected growing world economy over the next decade, the fitness sector will continue to expand and to grow. This expectation was also reflected in the replies by the Foresight experts, who see increasing competition, particularly with regards retaining and getting new clients. Driven by innovation, operators and professionals are expected to provide consumers not only with a workout session but also with an 'experience' – a key word, which appeared frequently in expert consultations.

5. Meeting future skills and employment demands within the Active Leisure sector

5.1 Outdoor

5.1.1 Education

As discussed above, there seems to be a real problem with the courses that are not bringing enough importance to social skills. Consequently, training providers may need to change/alter their courses so that the trainees can truly respond to the employer's needs. Course that focuses on the enrichment of students' soft skills competences could help service providers to better meet their clients' demand. The present situation seems however to be unsustainable in the near future for employers, employees and clients due to the lack of social skills shown by Outdoor Animators.

5.1.2 Technology

In line with the communication issues, technology can also be used as a beneficial tool in future actions regarding web communication, web marketing, etc. Before, during and after an outdoor activity some sort of action can be set up to promote in the best way any outdoor company. Linked with social media, newsletters, etc., the need for outdoor information on the Internet is in high rate and if information doesn't effectively reach out to potential clients, the sector will lose clients easily and fast.

Using the Internet will not always be linked to a marketing plan alone, of course. The Web needs to be used to promote not only businesses, but also other outdoor values, such as respect regards the environment. Preservation of the environment is of clear importance to all the service and training providers that were interviewed and questioned, but also to the Outdoor sector as a whole. It is important that the sector promotes such an issue because it essentially relies on it, since the core service is delivered in the outdoors.

During the Foresight survey many service providers expressed their deep concern regarding the outdoor environment. Their opinion was that, clients and people in general don't feel personally concerned by environmental issues such as e.g. global warming. Unfortunately, most of the respondents thought that even through many actions that have been set up by the outdoor community, clients and tourist in general still don't seem to have that mindset that makes them think about the respect and well-being of the environment they are enjoying

5.1.3 Development of further soft skills

Specifically, in terms of skills and employment and with customers' requirements in mind, it is essential that adapted training programmes and corresponding qualifications should be developed. In the light of the hundreds of hours of discussion summed up within the present report, the sector appears to be in need of a certification that should be delivered at EQF 5 with the view to complement the hard skills that are adequately delivered by NGBs and/or other (private) training providers. The latter, however, should remain within the context of 'field' Outdoor Animators and indeed not lead to the transformation of animators into managers.

In order to really cater for the needs of 21st century customers and clients the Outdoor education systems should change paradigm - away from classical traditional performance lead technical abilities - and enter into a new era where training standards are developed by the Outdoor sector itself.

Furthermore, it can be said that this evolution should already have been conducted some years ago and that nowadays, together with new communication, technological and environmental issues, the Outdoor sector has to evolve in 2 ways:

1) reconsider its intrinsic approach to soft skills;
2) consider its approach to the new and further soft skills required by customers.

Failing to do so, the Outdoor sector may jeopardize its future operational potential and become overtaken by self-practiced / self-organised outdoor activities that do not require the added value offered by outdoor companies and their animators. Lacking to evolve may also lead to the shift to outdoor amusement parks instead of a catered outdoor experience.

5.1.4 What the future might be

Different meetings of the newly set up Sector Skills Alliance for the Outdoors (O2SA) have recently addressed the issues described above, through a series of dedicated webinars held during the autumn of 2019 and the winter of 2020.

The growing consensus that was reached during these meetings was about the fact that qualifications are indeed to be modified as the surveys and interviews have clearly demonstrated. This however covers 2 aspects: the substance and the form.

The substance: in line with the results of the research, participants have acknowledged the importance of addressing soft skills like it has never been done before. It is of course necessary that Outdoor Animators should dispose of some technic, at least at a level above that of the clients they are looking after, but it is key that they should dispose of a strong background in terms of such skills as interpersonal communication, emotional intelligence, psychology, awareness and mindfulness.

The form: the tradition of face-to-face, on the hill or in the field courses organized from peer to peer for the last 80 years is reaching its limits. Flights, transport, accommodation, and extra spending for neighboring or far abroad destinations dictated by Outdoor locations where technical courses are being delivered are no longer 100% compatible with such issues as global warming, environment protection, species extinction and of course Covid-19 and social distancing. New formats will need to be invented, complementary to online courses that are momentary thriving.

It is interesting to see that during the last 6 months, Outdoor training has dropped dramatically, to the point that some organisations are in jeopardy. Many Outdoor training providers are small professional organisations with relatively high administrative expenses due to membership management and course organization and their sole membership is not enough to cover their regular functioning in a period when courses have been put to a halt in the aftermath of the Covid-19 pandemic.

As a consequence, it is both in their form and their substance that Outdoor training programmes will have to be altered.

5.2 Fitness

Several recommendations can be derived from the skills Foresight analysis. The intention of those evidence-based recommendations is to raise awareness for future labour market developments and strengthen the economic resilience of the fitness sector by turning challenges into opportunity.

5.2.1 Changing expectations and environments

Alongside the major dimensions presented above, the Foresight implies three more specific principles to keep in mind when discussing the future of the European Fitness Market 2030:

Technological unemployment – The public debate about the future of work is often affected by the "*fear of technological unemployment*" (CEDEFOP, EUROFOUND 2018). The term means "*unemployment due to our discovery of means of economising the use of labour outrunning the pace at which we can find new uses for labour*" and this definition by economist John Maynard Keynes is already 89 years old (ibid.). The description shows that the fear of losing jobs due to technological developments and the inability to find new work in the digital age comes with labour market changes and progress. At the same time, personal services in both the private (hotels and restaurants) and the public sector (various caring services) are less vulnerable to technological change (ibid.). One reason is the irreplaceable value of having a person – a social interaction – in place. Hence, there is a significant difference when the work is characterised by routines which puts the worker at a higher risk for being replaced by technology.

Keeping in mind the complex social interaction between client and fitness professional, the work force of the sector is at a lower risk to lose jobs due to digital and technological developments.

Increased competition and consumer retention – Nearly 9 out of 10 Foresight participants expect increased competition regarding acquisition and keeping clients in the future. The competition is driven by increased international competition, globalisation and innovation (SCHWAB 2018). At the same time, consumer sophistication is changing clients' attitudes and consumer patterns. Already today growing personalised advertising is reinforced by algorithms and big data (ibid.). The 'mass individualization' is believed to be an underlying marketing element and will become increasingly important for the fitness sector as well.

Differentiation **–** The Skills Foresight for Fitness 2018 pointed out what is confirmed as well by other sources: the labour market will be increasingly fragmented, and skills will become more specialised (BAKHSHI 2017). At the same time, a specialised skills set is rather prone to changes and less flexible. Therefore, specialisations can be valuable complements to a professional's core knowledge.

Differentiation in the context of fitness services was as well identified by 80% of Foresight participants. The fitness market is not expected to enforce one business model. It is rather expected that different business models will continue to coexist: the high-end club next to the more basic one, the club with the classic equipment next to the one with minimalistic machines and props.

5.2.2 The skills we will need

We will need the skills and the facilities to…

… provide clients with an 'experience' – Communication skills and a service-mind will be needed as much as the technical skills of a future professional. Within the next years, professionals will have to compete with artificial intelligence and technologies and the added value for a face-to-face interaction has to be demonstrated. The human interaction is unlikely to disappear in service sectors however, client sophistication will add to the need for improved 'people skills'

… increase 'specialisation'– Alongside the occupational core skills, the specialisation of skills is expected to gain more importance, particularly to work in the field of:

- health prevention;
- special population groups (older people, and people with non-communicable or lifestyle diseases).

… 'upskill professionals' – With the increased need for communication, service and specialised skills, lifelong learning opportunities will be increasingly in demand. Moreover, 4 out of 5 Foresight experts believe that fitness professionals will have to cooperate with the medical and health care sector. With increasing expected demand over the next decade, skills demand might change.

We will need skills to…

… maintain an attitude of learning and career development – *Lifelong learning and learning to learn, will become a necessity as labour markets and demands will continue to shift rapidly. With digital and technological progress, skills will outdate faster and will need continuous development and updates. To keep up with labour market changes, professionals are expected to actively maintain their skill portfolio.*

… use digital tools – 3 out of 4 Foresight experts believe in the growing use of digital platforms to find and book sessions online and to rate service of professionals. Such development asks for the right competences to (self-)market expertise and maintain a professional online

profile. Hence, the delivery of online training was rated as a highly common skill. Working remotely (online) with clients will provide the opportunity to expand the client base and suit members with flexible schedules.

… be able to maintain the expert role – Fitness professionals are expected to take on new and extended roles. Due to the increased amount of accessible information, more guidance for members will be needed. As demographic change and physical inactivity are expected to leave larger population groups living unhealthy lives, Foresight experts therefore believe that fitness professionals will need to maintain increasingly the role of a ‘healthy lifestyles coach’.

6. General conclusion

For the purpose of this skills Foresight report, Blueprint partners have engaged in a very comprehensive and extensive exercise carried out over a long period of time. Key stakeholders have been surveyed, interviewed, auditioned, conference called and met in an unprecedented way. The Active Leisure sector had not carried out such detailed and extensive work before.

The sum and quality of the information gathered is consequently very valuable and identified key drivers that matter to the sector in 2019/2020 and can be considered as valid and representative of the stakeholders’ view.

The fact that this Blueprint skills Foresight has lead to the creation of the first Sector Skills Alliance for the Active Leisure sector is of prime importance. The sector now disposes of a tool to continue and pursue the work engaged over skills analysis, skills gaps, projections and recommendations.

For both Fitness and the Outdoors, skills that have appeared to need to be addressed, have been identified in the field of ‘soft’ skills. The latter is a reasonably disruptive conclusion in the light of the historical approach of professional training in the Active Leisure sector.

Originated in the 70s on the back of sporting activities and clearly based at first on such concepts as ‘effort’, ‘technique’, ‘equipment’ and ‘performance’, the Active Leisure sector rapidly moved towards, ‘pleasure’, ‘health’, ‘fun’. At the start of the 21st century, Active Leisure continues to evolve towards an increasing diverse clientele that now requires professionals that master a more psychological and (re-) humanised approach linked to a true modern communication issue.

In order to respond to this new evolving paradigm, the Active Leisure sector will have to continue investigating on the one hand and finetune current evolutions on the other hand to make sure that its professionals’ skills are updated to customers and service requirements.

In the years to come, no doubt that this role will be undertaken by the newly formed Active Leisure Sector Skills Alliance.

Appendix

Active Leisure – Current position

(September 2020)

This Appendix is meant to provide an update on the latest developments (September 2020) in the field of employment and skills in the Active Leisure Sector, the research and foresight whose outputs are presented in the IO3 report having been mostly conducted from November 2018 to June 2019.

Indeed, given the rapid evolution of the Active Leisure Sector, as well as the unexpected outbreak of the Covid-19 in late 2019 and its numerous consequences on European societies and economies, we found it relevant to consider a few trends which could have impacted the findings of the IO3 report.

Thus, regarding the Fitness sector, this appendix outlines the main results of the latest employers skills survey (February 2020) (1) and the updated figures of the Skills-OVATE platform on vacancies in the Active Leisure Sector (September 2020) (2); it also examines the consequences of the Covid-19 on the fitness sector's workforce through the results of survey conducted by EREPS in July 2020 (3).

Regarding the Outdoor sector, the most relevant event so far was the establishment of the Sector Skills Alliance for the Outdoors (O2SA).

1. The 2020 Employers Skills Survey results

Employers representing over 2,000 clubs across 22 different European countries took part in EuropeActive's 6th edition of the annual skills survey where the findings and trends help provide the evidence and direction for future qualification and skills development of fitness professionals:

- Recruitment is now identified as a critical area for the sector with 115,000 current vacancies for fitness trainers across Europe.
- 26% of all fitness trainers are self-employed, and this percentage is expected by half of the employers to increase in the future.
- Despite a small increase, only 19% of employers find it easy or very easy to recruit the trainers they need.
- The No1 skills area that employers look for when recruiting are personal/communication skills and customer service skills (92% and 88%).

- Technical skills remain important (especially for group fitness instructors), but in decline over the years.
- Surprisingly, digital skills remain quite low in the list of requirements with just 39% of employers saying that they are important/essential.
- 64% of employers reported that they 'always' or 'nearly always' had to give additional training to their new recruits with personal/communication skills and customer service skills (55% and 61% respectively) as the highest demand. This has been an area of concern for the sector for many years but shows no sign of being resolved in current vocational training. 40% of employed said that that current training and education 'never', or 'almost never' gave fitness trainers the skills that they were looking for when recruiting.
- Over the past years there has been a constant requirement from employers (87% saying it is important or essential in this survey), that personal trainers should be able to work with more diverse populations (e.g. children, older adults, overweight, etc.).

2. An update on vacancies in the Active Leisure Sector

Despite an anticipated positive development of the sector and an annual growth at 4%, Active Leisure employers face current and future skills shortages and skills mismatches. Based on Cedefop's skills online vacancy analysis tool 'Skills-OVATE' (Cedefop, 09/2020), the trend persists: the EU Fitness sector alone is seeking to fill 107,675 vacant positions across EU27 (137,374 vacancies when including the UK).[4]

3. The Covid-19 impact on the Fitness workforce

An internal survey on the Covid-19 impact on the employment conditions in the fitness sector was conducted by EREPS in July 2020 among 226 of its members. It indicated quite alarming results:

- Half of the fitness sector staff works on reduced hours/income, and nearly 23% lost their job (and/or were made redundant).
- Almost all fitness staff faced reduction in their employment income – with a drastic reduction of 60 to 80% for more than half of them (54%).
- Almost half (46,9%) of fitness clubs are concerned or slightly apprehensive about their clients/participants returning to training/classes in a normal fitness environment.
- Fortunately, almost 62% are still positive or very optimistic about the future of the fitness industry, with only about 10% saying they are unlikely to remain in the fitness industry post-Covid-19.

[4] Source: Cedefop, https://www.cedefop.europa.eu/en/data-visualisations/skills-online-vacancies

4. Outdoors – Current position

During a number of meetings of the newly set up Sector Skills Alliance for the Outdoors (O2SA) the findings of the present IO 3 report were further explored. These meetings were held during the autumn of 2019 and the winter of 2020.

An almost constant issue during these meetings was the absolute need for more attention to the so-called 'soft skills'.

Unfortunately, the work of this Sector Skills Alliance came to an abrupt end with the death of one of its leading figures, Michalis Tsoukias (+ 24-03-2020). Michalis was one of the first Greek victims of Covid-19.

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