

The skills impact of the 2012 Sailing Events

Learning and Skills Council

April 2007

For and on behalf of Experian	
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Date:	17 April 2007



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Executive summary

The 2012 sailing events are a huge opportunity for Weymouth and Portland, Dorset and the South West. But the context is very different from in East London's 5 Host Boroughs, due to:

- demographic profiles, particularly in regards to country of birth, ethnicity and age;
- skills profiles, particularly at the extremes of qualifications (i.e., proportions of the population with either no qualifications or NVQ4+ qualifications);
- levels of deprivation;
- levels of construction activity planned;
- international profile, i.e., London and Dorset.

It is important to use the 2012 sailing events to take forward broader aspirations for the area, rather than seeing the sailing events as an end in themselves. Local communities and businesses are much more likely to invest in themselves if they perceive the 2012 sailing events as one of many stepping-stones to making Weymouth and Portland a more successful, more prosperous and more sustainable place to visit, and in which to live and work. The key is ensuring the 2012 sailing events are one day seen as an important milestone in a broader revitalisation.

In this context, there are two identifiable challenges for the locality:

- enhancing Weymouth and Portland's offer to visitors and residents;
- putting Weymouth and Portland "on the map", nationally and internationally.

Making the most of the locality's remarkable natural assets depends on a range of inter-linking factors: having appropriate, high-quality facilities for mooring; appropriate, high-quality hotels and restaurants; trained staff and high levels of customer service excellence; quality provision of training for new sailing and sports enthusiasts; and entrepreneurs with the skills and initiative to service higher numbers of higher-spending visitors. Skills are a key component in this.

To deliver the skills required in the local population, post-16 education and training will need to be focused on raising the local population's qualification-levels to above NVQ1 (where the locality is currently over-represented) to NVQ2/3/4+ (where the locality is currently severely under-represented). The sectors in which education/training is likely to be most in demand are:

- retail, hospitality and customer service;
- marine leisure;
- business, with marine/leisure components where possible;
- languages;
- sports including marine, with competition administration components where possible (this includes building up a base of appropriately skilled volunteers for future competitions);
- construction, if potential/planned developments look likely to go-ahead.

The preparations for a legacy do not begin in 2012, they begin now. Indeed, they will need to build on the succession of preparatory camps and the 2010/2011 test events to establish a momentum with local businesses, residents and education/training providers that is sufficient to catapult the locality into 2012 and beyond.

Hosting the 2012 sailing events is a huge opportunity for the locality but the benefits are potential only – they cannot be taken for granted. Key 2012-related sectors (hospitality, retail, sports and marine leisure) are already strong locally and regionally. But the local offer is currently low-value compared to competitor locations in the UK and indeed internationally. This needs to change and 2012 is a unique opportunity to take one step towards this.

The report includes a number of recommendations:

- Preparatory activities need to build on the momentum established during the succession of training camps and 2010/2011 test events that will take place in Weymouth and Portland in the run up to 2012.
- Successful staging of the sailing event will be of uppermost importance. In order to do this, collaboration should take place between the assortment of local expertise in the area. Local businesses need to perceive the 2012 Games as a stepping stone to making Weymouth and Portland more successful, prosperous and sustainable.
- In order to capitalise on tourism opportunities, there is a need for a sustainable tourist strategy. This should focus on coordinated leveraging, and utilisation of South West Tourism's three strategic aims: driving up quality, delivering sustainable tourism and creating superior destination arrangements.
- Raising local skill levels above NVQ Level 1 will be critical in tackling the locality's poor skills profile. Policies and interventions should focus on raising skill levels in relevant sectors, enhancing language skills and encourage progression through the qualification system.
- The 2012 Games should provide opportunities to involve people currently unemployed or inactive, through either pre-volunteering programmes or targeted interventions. It is recommended that such initiatives be started two years in advance, work with local schools, colleges and universities in developing vocational pathways, and focus on segments of employment where there are realistic odds of people gaining employment.
- To establish a skills legacy in the area, there is a need for the creation and implementation of sector-relevant schemes that promote viable career pathways. Two facets of this will be the provision of targeted accredited training and the utilisation of local volunteers in order to capitalise on current skills sets in the local area.

Introduction

BACKGROUND

The London 2012 Games are, by their nature, focused on the nation's capital. However, the organisers of the Games have been clear ever since the initial bid that the benefits of the Games should be felt throughout the UK nations and regions. Outside London, the South West region perhaps has the greatest opportunities as the sole host of the 2012 sailing events.

Experian's report for the Learning and Skills Council (LSC) London and the London Development Agency (LDA), *Employment and skills for the 2012 Games: research and evidence*,¹ highlighted the fundamental importance of early action by the public sector if the potential positive effects of the Games are to be harnessed. The report highlighted the impacts that the Games were likely to have on the London economy and labour market. However, the report also highlighted that the real impacts – the legacy effects – could not be taken for granted, and were dependent on early, pro-active interventions by government and business to harness the potential of the 2012 Games.

The potential impacts on labour markets and skills are two-fold. Firstly, appropriately skilled workers will be required to deliver all aspects of the Games – creating the built environment, staging the Games and showcasing the country. Secondly, the Games themselves provide an opportunity to tackle labour market issues such as worklessness and to raise the bar in skills levels across a range of sectors.

In October 2006, the LSC commissioned Experian to undertake a review of the skills impact of the 2012 Games in Weymouth and Portland and the wider South West of England. Following this, our research has shown that the major business-as-usual impacts are likely to be felt at the local level, with some county impacts too. Pro-active efforts to lever benefits from the Games across the South West region are being taken forward separately by Team South West, as set out in its draft '2012 Legacy Strategy'. This report focuses on local (and county) impacts. We hope our research helps the LSC and its partners in its ongoing work on the 2012 Games.

AIMS AND OBJECTIVES

The overall aim of this research was to identify the labour market and skills opportunities likely to arise for Weymouth and Portland as a result of hosting the 2012 sailing events. The specific objectives were to:

- review the need and opportunity arising from the Games, specifying which sectors of the local economy are likely to experience the largest impact in terms of job creation and skills requirement;
- estimate expected labour requirements in terms of sectors, occupations and skill levels;
- assess the readiness and suitability of the existing pool of local labour to fill those jobs, and whether there are skill gaps that need to be addressed;
- appraise the suitability of the existing post-16 learning environment to address any skills needs, shortages and gaps that may arise;
- consider the potential 2012 legacy effect.

¹ Accessible at <http://readingroom.lsc.gov.uk/lsc/2006/research/commissioned/nat-employment-and-skills-for-the-2012-games-research-and-evidence-jun-2006-main-report.pdf> or <http://www.lda.gov.uk/server/show/ConWebDoc.1646>

1 2012 sailing events: impact and opportunities

1.1 INTRODUCTION

The skills impact of 2012 is intimately linked to the sailing events.

When Weymouth and Portland was declared host of the 2012 sailing events, it became the first time in recent history that the event would be held in a town or city that is not in (or neighbouring) the host city. The anchor of the Weymouth sailing event is the purpose built Weymouth and Portland National Sailing Academy (WPSNA) which opened in 2000. In preparation for the Games, the Olympic Development Authority (ODA) is building a longer, dual-aspect slipway and more race-boat parking and lifting facilities at the Academy², whilst Portland Harbour will undergo major redevelopment in the run up to 2012³.

Sailing in the UK is a popular recreational past time: 2.5 million people currently take part in some form of the sport, with figures projected to increase by 5 per cent per annum⁴. WPSNA also reports a strong interest from people wanting to sail. Importantly, 70 per cent of their clients for training packages are career change professionals choosing sailing or water sports as their future vocation⁵.

There are already a number of sailing events hosted in the South West, including:

Sailing Event	Boats	Competitors	Media	Spectators	Duration (days)
Cowes Week	1,040	8,500	3000	2,000-3,000 spectator boats	8
ISAF Youth Sailing World Championships	-	261	-	1,000	6
Skandia RYA Sail for Gold Regatta	264	263	-	-	3
Weymouth and Portland 2012	270	400 (+ 80 paralympians)	630	12,600	8 ⁶

The actual size of the 2012 events in relation to other events held in the locality suggests a successful precedent exists for hosting events akin to the Games. However, visitor and media interest is likely to be unparalleled. The Olympic brand, together with a national history of medal success is likely to draw in visitors and spectators who are not usually followers of the

² Team South West (2006), *Lighting the Flame*, South West Regional Development Agency.

³ Experian Business Strategies (October 2006), *Economic advice on potential mixed use development in Weymouth – confidential report*.

⁴ The Royal Yacht Association (2003), *Water Sports Participation*

⁵ www.wpsna.org.uk

⁶ www.olympics.org

sport. Coverage will also be worldwide and prime time. This is the major differentiating factor of the 2012 Games in relation to other sailing events hosted in the area.

Delivering the 2012 sailing events in Weymouth and Portland will present a large number of opportunities distributed across a wide area, but these will be very different from those that arise in East London where the majority of events are being held. This is due to both the nature and variety of opportunities available at present, and also the very different socio-economic and labour market climates that exist within the two areas.

Nevertheless, our analysis of the requirements of the 2012 Games in London identified five key challenges in the area of skills and employment which are also relevant for Weymouth. These are:

- getting the facilities built to plan;
- making the sailing events a triumph;
- showcasing and enhancing the area's reputation;
- creating opportunities for local people;
- leaving the area with a legacy of higher-skilled jobs for better skilled people.

However, the nature of some of these challenges in Weymouth and Portland is significantly different to their nature in East London.

1.2 OVERVIEW OF IMPACT AND OPPORTUNITIES

In London, the greatest potential impact is expected to be in the 5 Host Boroughs of Newham, Waltham Forest, Hackney, Tower Hamlets and Greenwich, all of which are in the immediate vicinity of the Games. In the South West, it is most probable that the largest immediate impact will be experienced around the site of the sailing event and the county of Dorset, i.e., within the travel to work/shop catchment area.

However, there are opportunities for the wider South West region because the 2012 Games' greatest impacts are likely to be in sectors of importance to the whole regional economy. The South West Regional Development Agency (SWRDA) has already identified tourism and regional image as a key 2012 impact, in line with the region's wider strengths as a visitor destination and its aspirations to cement its reputation as a global tourism leader.⁷

Broadly speaking, the impact and opportunity of the 2012 Games for Weymouth and Portland is very different to London's 5 Host Boroughs. These large differences include:

- demographic profiles, particularly in regards to country of birth, ethnicity and age;
- skills profiles, particularly at the extremes of qualifications (proportions of the population with either no qualifications or NVQ4+ qualifications);
- levels of deprivation;
- levels of construction activity planned;
- international profile, i.e., London and Dorset.

Our assessment of impact and opportunities was undertaken within the context of these significant differences. However, in broad terms, estimates of 2012 employment and skills impacts can be segmented into the same three broad categories as in London:

- creating the built environment;
- staging the Games;

⁷ *South West Regional Economic Strategy 2006-2015 and 2012 Games Legacy Strategy*, accessible at <http://www.southwestrda.org.uk/>

- showcasing Weymouth and Portland and the wider South West.

It should be noted that this section is concerned with the quantifiable impacts of the Games under a *business-as-usual* scenario, i.e., the impacts that are likely to happen even without direct public and private sector intervention. The opportunity to use the Games as a catalyst to further boost jobs, visitor numbers, participation, competitiveness, profile, etc is considered later.

1.3 CREATING THE BUILT ENVIRONMENT

Hosting the Games themselves will generate significant amounts of construction activity. Indeed, the level of employment generation in all Olympic Games and Paralympic Games is closely linked to the scale of investment in infrastructure – the greater the investment, the greater the number of jobs created. However, in the 2012 context, much of the directly-related construction activity is focused in London, mainly in and around the 5 Host Boroughs. (There are other possible/planned developments in Weymouth and Portland which are indirectly-related to the 2012 Games, so we also consider these briefly for contextual purposes.)

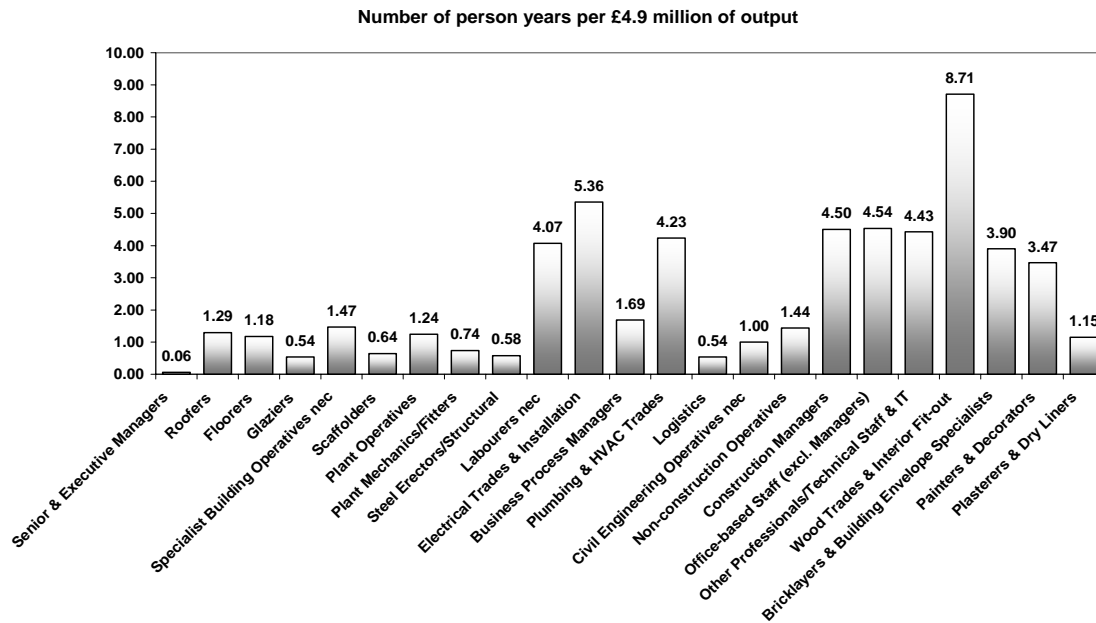
The Weymouth and Portland National Sailing Academy (WPSNA) opened in June 2000 as a designated ‘Sailing Centre of Excellence’. Build specific to the 2012 Games will focus on the dual-aspect slipway and race boat parking, lifting and mooring facilities at the WPSNA, which will transform the venue from one that is considered top class to one that is considered world class.

The planned upgrade of the WPSNA is estimated to cost £6.4million.⁸ In order to provide a broad estimate of the likely employment generation associated with this construction activity, labour co-efficients developed for the Construction Skills Network Employment Model by the BCIS and the University of Dundee⁹ were applied to the anticipated spend. The labour co-efficients have been calculated in 2000 prices, therefore the £6.4million cost has been deflated to 2000 prices, equating to an estimated cost of £4.9million. The results are as follows: there are likely to be up to 60 person years of employment generated by the upgrade to the WPSNA.¹⁰ The figure below breaks these person-years of employment down into occupations to provide an indication of where these employment opportunities are likely to be focused.

⁸ www.wpsna.org.uk and consultation in November 2006.

⁹ Labour co-efficients indicated the number of employees required to produce £1 million of output of different types of structure, in 2000 prices. These co-efficients are the result of ongoing research and will be refined further. The employment estimates have been segmented by the 23 Standard Occupational Classifications (SOCs) currently in use by CITB-ConstructionSkills.

¹⁰ A person-year is the equivalent of one person employed for a full year. This is particularly important in the construction industry wherein people are not necessarily employed in the same job year-round.



Source: Experian (2006)

Other possible/planned developments include:

- the re-development of Osprey Quay, including a new 500 berth marine and industrial park (estimated phasing 2007-2012);
- the proposed Olympic sub-village at Southwell Business Park, which will accommodate race officials and support staff¹¹
- the Weymouth relief road;
- new hotels in the Weymouth and Portland area;
- Portland Harbour.

There is some uncertainty over the details of these developments – final shape of plans, final costs, final phasing, etc. However, we have very made some broad calculations of the likely employment impact *if this construction activity was to go-ahead*. Using the same method as above, we estimate that at least 800 person-years of employment would be generated by construction activity on this scale. This is clearly much higher than the construction activity directly-related to the 2012 Games around the planned upgrade to the WPSNA.¹²

A further contextual point is the scale of construction employment generation across the region in the years leading up to the 2012 Games. A summary of Experian’s detailed forecasts of occupational requirements are presented below:

¹¹ Team South West (2005), *Lighting the Flame*, South West Regional Development Agency

¹² The figure of 800 person-years of employment is based on cost estimates for Osprey Quay and the Weymouth relief road only, although we have been unable to identify final cost estimates for either of these developments. We provide this figure here to contextualise the directly-related construction employment figures from the WPSNA up-grade with potential employment generation from wider major-project construction activity in the locality.

South West construction employment: forecasts

	Employment		Annual employment recruitment requirement
	2007	2011	2007 – 2011
Construction Managers	13,120	14,090	350
Wood Trades & Interior Fit-out	23,560	25,930	850
Bricklayers	11,740	13,280	510
Building Envelope Specialists	12,720	14,390	550
Electrical Trades & Installation	13,730	14,800	560
Plumbing & HVAC Trades	14,780	16,050	320
Total for all occupations	202,250	216,340	5,250

ConstructionSkills Network and Experian, 2006

The Average Annual Requirement represents the number of extra workers that are required each year to enable the industry to meet the forecast change in construction output after taking into account those entering and leaving the industry. To meet forecast demand for construction workers in the South West it is estimated that 5,250 additional workers will be required each year over the 2007-2011 period. Clearly, the 60 person-years of construction employment likely to be generated by the planned upgrade to the WPNSA is relatively insignificant in this context. However, should the possible/planned developments outlined above all go ahead, then this would be significant within the regional context and certainly within the local context.

1.4 STAGING THE GAMES

The staging of the Games is important simply because of the likely scale of visitor and media interest in the sailing events. Sailing events made their debut at the Paris Games in 1900, where contestants raced on the River Seine, and despite undergoing dramatic changes in the type of boats used, have remained a component of all successive Games since. Currently, there are 11 sailing disciplines in 9 boat classes, including windsurfing. There remain strict regulations on the format of the event, with the total number of athletes, including reserves and alternates, limited to 400 per team, with a maximum of 308 persons per team¹³.

The 2012 sailing competition is proposed to run from 28th July to 11th August. A total of 11 events and 126 races will be held in Weymouth, with 61 nations represented by 400 competitors over 8 days of racing¹⁴.

Altogether, LOCOG has estimated that around 100,000 people will be required to organise and run the London 2012 Games.¹⁵ This number is likely to break down along the following lines:

- 70,000 volunteers;

¹³ www.olympic.org.uk

¹⁴ www.weymouth.gov.uk

¹⁵ *Employment and skills for the 2012 Games: research and evidence* (2006), Experian for London LSC and LDA. Accessible at <http://readingroom.lsc.gov.uk/lsc/2006/research/commissioned/nat-employment-and-skills-for-the-2012-games-research-and-evidence-jun-2006-main-report.pdf> or <http://www.lda.gov.uk/server/show/ConWebDoc.1646>

- 3,000 paid staff directly employed by LOCOG, likely to come on stream after Beijing 2008 and peak in 2011;
- 27,000 paid staff contracted by LOCOG, mainly temporary and likely to come on-stream 12-18 months prior to the opening ceremony.

LOCOG estimates that the greatest share of the 3,000 staff directly employed will be involved in the following activities:

- Management
- Human Resources
- Sponsorship
- Communications
- Culture
- Sports specialists
- Legal

The estimated 27,000 contractual jobs are likely to be mainly temporary, specialist jobs. These staff will be fundamentally tasked with running the Games – such as events, venues and technology. These jobs are likely to be broken down as follows:

- Management of sporting events
- Management of venues
- Technology/IT
- Security
- Transport
- Ticketing

There is no confirmation yet around how many (if any) of these jobs will be based in Weymouth and Portland. Evidence from previous Games is also thin, particularly because in recent times the sailing events have been hosted in or near the host city and therefore separate employment numbers have not been provided. Evidence from previous Games that does exist is generally along the lines of Sydney using 300 specialist sports volunteers for its sailing events and Atlanta for its employing 115 specialists. Estimates of officials required for the 2012 sailing events are around 75 per course, with 5 courses planned.¹⁶

The Weymouth and Portland Sailing Academy currently employs around 80 individuals on a full time basis¹⁷. These positions are split across three main occupation types: sailing instructors and assistants, caterers and administrative staff. Due to the year-round nature of the sport, these positions are not seasonally dependent and last for the duration of the year, although attendance peaks between April and November.

1.4.1 Volunteers

The Games provide opportunities not only for paid work but also for voluntary work. Indeed, the estimated 70,000 voluntary positions are 70% of LOCOG's overall estimated labour requirements.

The table below details the number of volunteers involved in previous Games, recruited through a planned and structured programme. In hosting its sailing event, Sydney utilised 300 general volunteers and 300 specialist sport volunteers, whilst Atlanta employed 115 specialists and used 1,466 volunteers for its sailing competition in Savannah. For other sailing events, the ISAF

¹⁶ Consultations between November 2006 and February 2007.

¹⁷ www.wpsna.org.uk

Youth Sailing World Championship organisers utilised 150 volunteers for administrative and logistical duties, whilst over 900 people took part in the opening ceremony parade.

Volunteer Numbers in Previous Games	
	Number of Volunteers
Barcelona 1992	35,000
Atlanta 1996	54,000
Sydney 2000	60,000
Manchester 2002	10,500
Athens 2004	45,000

Source: Olympic Organisation Post-Games Reports (data for Athens sourced from www.athens2004.com)

London 2012 organisers have emphasised the importance of the volunteer programme, both in terms of involving the people of the nations and regions and in terms of providing opportunities for people with low skill levels or currently disengaged from the labour market. The success of Manchester 2002's pre-volunteer programme in engaging local people has received much attention. Volunteer programmes offer an opportunity to access hard-to-reach groups and those who do not usually become involved in such projects, or who are disengaged from the local labour market. A Pre-Volunteer Programme (PVP) enables volunteers to develop their own skills, whilst ensuring that they are sufficiently prepared to undertake their responsibilities during the event.

The potential to use large public events as a hook to enhance the labour market was recognised early on by Manchester 2002 organisers and the public sector, alongside a recognition that proactive efforts were required. As part of the Manchester 2002 Commonwealth Games, a Pre Volunteer Programme was created specifically to target hard-to-reach groups who typically would not volunteer or actively seek work. Final evaluation of the PVP suggests that it had considerable success in engaging hard-to-reach groups, in providing training and in enabling PVP participants to volunteer during the Games themselves¹⁸.

Work is currently underway on drawing up the official 2012 (pre-)volunteering strategy¹⁹. However, a breakdown of functional areas of volunteers involved in the Sydney 2000 Games may broadly translate to those engaged in the London Games²⁰:

- Sport Competition – 22%
- Transport – 20%
- Spectator Services – 18%
- Medical – 9%
- Paralympic Village – 8%
- Security – 6%
- Accreditation – 4%
- Technology – 4%
- Services – 3%
- Press Operations – 3%
- Relations and Protocol – 2%
- Uniforms – 1%

¹⁸ 'The XVII Commonwealth Games Manchester 2002 – Pre Volunteer Programme Final Report', available at <http://www.gameslegacy.com/files/Final%20Report.doc>.

¹⁹ www.london2012.org.uk

²⁰ Official post-Games report of the Sydney 2000 Games

Again, there is no confirmation yet on final requirements for volunteers for the sailing events in Weymouth and Portland. Estimates vary from a ratio of 4 to 5 volunteers to each competitor (which translates into a total number of 1,600 – 2,000 volunteers) to a more general figure of 750 per day.²¹ Volunteers will be needed across a wide range of activities, from marshalling out on the water to manning the car parks. Consultation evidence reveals that whilst organisers are waiting for the LOCOG volunteer strategy to be released before final decisions concerning recruitment of volunteers are made, they are likely to take advantage of the demographic profile of Dorset, which contains many ex-professionals with language skills²².

1.4.2 Olympic Test Events and Training Camps

Test events provide competitors with an opportunity to experience race conditions in advance of the Games themselves. Sailing as a competitive sport is unique insofar as race conditions are directly affected by environmental idiosyncrasies (such as tidal and wind patterns) that cannot be replicated elsewhere. Thus, it is imperative that sailors are offered the chance to practice in conditions that are similar, if not the same, as those that will be present on race day. Ahead of the 2012 Games, two test events will take place in Weymouth in 2010 and 2011. Teams are allowed to submit two athletes for each individual place in the final competition, doubling the number of athletes and boats using the facilities.

In addition to these two events, training camps are also taking place at the WPNSA and other local sailing facilities. Training camps are set up by National Olympic Committees and National Paralympic Committees as a base for athlete training. These are different from training venues, which are usually in close proximity to the Olympic venue and used predominately during the Games themselves. Teams look for world class facilities and similar climatic conditions within a half-day direct flight from the Olympic venue. In the run-up to 2012, 25 per cent of European nations are expected to train at home. Non-European nations could train anywhere within a 2 hour flight, which encompasses mainland Europe as well as the UK²³.

The process of selecting official training venues started in the summer of 2006, with deadlines for submissions at the end of January 2007. Distribution of the National Olympic Guide will be in August 2008. However, anecdotal evidence suggests that teams from the countries with particularly strong sailing teams have already started to practice on the waters in Portland Harbour, and demand will only increase in the run up to the main events. Indeed, there are a number of Royal Yachting Association training camps scheduled at WPNSA in the forthcoming months.

The test events and training camps are clearly an opportunity for Weymouth and Portland, as well as the wider county and region. The presence of competitors and their support teams will generate demand for local services, ranging from marine specialists to physiotherapists. Support teams are usually comprised of doctors, physiotherapists, caterers, meteorologists, dieticians, coaches, strength and conditioning people and other assorted staff. The extent to which teams interact with the local services available is very much dependent on the nature of the individual team, with larger, more established teams likely to be more independent. Nevertheless, the events leading up to 2012 will generate demand for staff and volunteers associated with sailing events.

²¹ Consultations between November 2006 and February 2007.

²² Consultation in November 2006.

²³ Curling, S (2006) *What is a training camp?* NOC and NPC Relations

1.5 SHOWCASING WEYMOUTH AND THE SOUTH WEST

One of the benefits to a host country is greatly enhanced profile as the world's eye turns itself on the Olympic and Paralympic spectacle for a number of weeks, either by visiting or by media. London is already one of the most well-known and most highly visited cities in the world – a global city in every sense. Weymouth and Portland, Dorset and the South West are less well-known on the international stage. Nevertheless, tourism is a critical economic sector to the South West region, attracting 20-26 million visitors a year, and is thought to be worth around £8 billion to the regional economy²⁴. In 2005, 19 million trips to Dorset alone generated over £1.2 billion in total visitor spend, supporting over 30,000 full time jobs²⁵, whilst the £8.3 million spent by visitors to the South West supported 307,000 jobs²⁶. However, whilst the tourism industry maintains its vital role in the local economy, persistent recruitment and retention challenges revolving around low-skill, low-wage perceptions of the sector continue²⁷.

Various views exist as to the likely number of tourists who will be attracted to Weymouth and Portland as a result of the sailing events, ranging from the official figure of 12,600 per day/sailing session to estimates of 70,000 from consultations. These figures are in addition to the 400 competitors and their support teams. Contextually, Cowes Week on the Island of Wight has 8,500 competitors, but attracts a smaller, mostly local, number of spectators. Therefore, whilst the scale of the 2012 sailing events themselves is not significantly larger than others in the area, it is expected to attract more visitors because of the pulling power of the Olympic brand.

Despite the uncertainties over exact visitor numbers (and the role of any displacement that may occur, with some regular visitors perhaps deciding to stay away), we have made broad estimates of the likely impact of visitor spend on employment generation. We have taken estimates of visitor numbers/spend and run these through the *South West Observatory: Business & Economy Module (SWBEM) Input-Output model* in order to estimate the likely scale of employment opportunities that will be created by the Games²⁸.

Using the official LOCOG estimate of 12,600 visitors per day, in addition to other types of expected 'visitors', we began with a number of 13,700 broken down as follows:

- 400 athletes²⁹
- 630 media³⁰
- 70 sporting officials³¹
- 12,600 spectators³²
- Total = **13,700 per day**

²⁴ www.swrda.org.uk

²⁵ www.towards2015.co.uk

²⁶ South West Tourism (2005) *Towards 2015*

²⁷ Bournemouth, Dorset and Poole Economic Partnership (2005) *Regional Economic Strategy, 2005 – 2016*.

²⁸ This is funded by SWRDA and based on actual South West data i.e. not UK data with South West adjustments, as is the case with a lot of regional Input-Output (I-O) analysis. I-O models account for the knock-on effects of increasing output in one industry on another industry, since industries require each others' inputs. In addition, the consumer expenditure effects of increasing output are accounted for – more output means more income and more spending/demand.

²⁹ www.london2012.org.uk

³⁰ IOC Data

³¹ Calculated on the broad assumption that the sailing event accounts for 4 per cent of total participation and therefore requires 4 per cent of the officials.

³² www.london2012.org.uk

Analysis of Tourism South West data revealed that the average spend per day/night in Dorset is **£45.50**.³³ Since the main event sailing events are spread over **8** days, total visitor spend was estimated at $(13,700 \times 45.5) \times 8 = \mathbf{£4,986,800}$.

On this basis, we estimate that over the course of the whole year it will increase jobs by around 100 on average. However the impact on employment will be concentrated during the 8 days in which the additional tourism occurs. This number does not take into account any additional activity undertaken by local/regional partners to enhance the profile and number of visitors in the lead up to the Games. The jobs are likely to be broken down broadly as follows:

- Hotels and catering – 37
- Retail – 10
- Wholesaling – 11
- Entertainment – 6
- Business services – 9
- Other – 28
- **Total - 101**

Other estimates of visitor numbers are much higher, as described above, indeed as high as 70,000 per day. To provide an indication of what impact such high numbers of visitors would have, we have undertaken the same calculations as in the exercise above but substituted the visitor numbers with the higher estimate of 70,000. Under this scenario, we estimate that over the course of the whole year it will increase jobs by over 500 on average (again the impact on employment will be concentrated during the 8 days in which the additional tourism occurs):

- Hotels and catering – 189
- Retail – 52
- Wholesaling – 56
- Entertainment – 33
- Business Services – 48
- Other – 140
- **Total – 518**

It is important to note that 2012 sailing events related impacts will begin before 2012. Test events and preparatory camps will generate opportunities not just in sports-related sectors, as described above, but in tourism and hospitality sectors too. The impact itself is difficult to quantify, but should not be forgotten by policymakers. Activity around the 2012 Games needs to begin now.

³³ A weighted mean of figures calculated by dividing the number of nights spent by domestic/international visitors in the region by amount spent by domestic/international visitors.

1.6 SUMMARY

In summary, the estimated gross labour market opportunities likely to arise from the 2012 sailing events are as follows³⁴:

Phase	Impact on labour market	Labour market opportunities
Creating the built environment	<ul style="list-style-type: none"> • WPNSA upgrade • Indirectly related possible / planned developments 	<ul style="list-style-type: none"> • 57 person years of construction employment • Over 800 person years of construction employment
Staging the Games	<ul style="list-style-type: none"> • Planning, preparation and staging of sailing events • Test events and preparatory camps • Pre-Volunteer Programme and Games-time volunteers 	<ul style="list-style-type: none"> • 70-375 officials/sports specialists during the Games • Officials/sports specialists in the lead-up to 2012 • Estimates ranging from 750-a-day to an overall total of 1,600-2,000 volunteers
Showcasing the locality	<ul style="list-style-type: none"> • Estimates ranging from 12,600-15,000 visitors-a-day (official) to 70,000 visitors-a-day (unofficial) during the competition • Test events, training camps 	<ul style="list-style-type: none"> • Estimates ranging from 100 (based on official visitor estimates) to 500 (based on unofficial visitor estimates) jobs in hospitality, tourism and retail • Jobs in hospitality, tourism and retail in the lead-up to 2012

³⁴ The estimates of labour market opportunities do not take into account any potential displacement effects.

2 The local labour market

2.1 INTRODUCTION

The labour markets of East London and Weymouth and Portland are very different. This is an important distinction to be made by policymakers when defining objectives and interventions around 2012.

For Weymouth and Portland, there are three key considerations:

- Ensuring that there are sufficient people with sufficient skills to deliver the sailing events successfully (creating the built environment, staging the events themselves and showcasing the area).
- Ensuring that the opportunities are harnessed to engage the inactive and unemployed in the local labour market.
- Ensuring that the Games are used as a hook to encourage up-skilling in local businesses and local workers, not simply to fill any skills shortages around 2012 jobs, but to create a step-change in the local labour market and therefore the local offer, in readiness for the global profile that the sailing events themselves will bring.

2.2 LOCAL LABOUR MARKET OVERVIEW

2.2.1 Population Profile

There are two striking differences between the population profiles of the Weymouth and Portland and Dorset area and the 5 Host Boroughs.

Firstly, Weymouth and Dorset have a very high proportion of people of pensionable age (19% and 24% respectively). This compares to a UK average of 16% and a 5 Host Boroughs average of 10%). This provides a very different context when designing interventions to capitalise on the 2012 employment vacancies and volunteer positions.

Secondly, the London Games are taking place in some of the most ethnically diverse areas of the UK; in some of the Host Boroughs, around half of the population is classified as minority ethnic. Conversely, over 98 per cent of the population in Weymouth and Portland classify themselves as white. This has implications both in understanding the different barriers and challenges facing the local working age population of each area, and in designing interventions.

The South West has relatively high rates of activity compared to the UK average, a statistic that places the region in sharp contrast to the Host Boroughs, which has a comparatively high number of economically inactive residents. The Host Boroughs are indeed some of the most severely deprived areas of the UK. The table below shows the activity, employment and unemployment rates for Weymouth and Portland, the South West and the Host Boroughs.

As can be seen, 78 per cent of the working age population of Weymouth and Portland is economically active, which is in line with the South West. In comparison, only 62 per cent of residents are economically active in the Host Boroughs. This is not to underestimate the challenges facing the Weymouth and Portland area, but rather to use the Host Boroughs as comparator areas to illustrate the different labour market context.

Comparison of population profiles					
	Weymouth	Dorset	South West	UK	Host Boroughs
Population	64,600	92,360	5,067,800	58,485,000	1,075,565
% population who are of pensionable age	19	24	19	16	10
% of population classified as White	98	99	98	91	58
Economic activity rate – working age	78	60	80	78	62
Employment rate – working age	75	64	78	74	53
% of working age who are self employed	5	14	10	9	7

Source: APS (April 2005 – March 2006)

2.2.2 Employment by sector

Strong economic performance over the past decade has enabled the South West region to establish one of the highest employment, and lowest unemployment rates, in the UK. However, employment in Weymouth and Portland is currently skewed towards public services and typically lower-value, lower-skilled sectors such as distribution, hotels and catering rather than the recent high-growth sectors at the UK level such as financial and business services.

Employment by Sector as a Percentage of Whole Economy				
	Weymouth and Portland	Dorset	South West	UK
Agriculture, Forestry & Fishing	0.2%	4%	2%	1%
Mining & Utilities	0.4%	1%	1%	1%
Metals, Minerals & Chemicals	2%	4%	2%	3%
Engineering	1%	6%	5%	3%
Other Manufacturing	0%	6%	4%	5%
Construction	10%	8%	7%	7%
Distribution, Hotels & Catering	32%	25%	25%	23%
Transport & Communications	3%	6%	5%	6%
Financial & Business Services	14%	13%	18%	20%
Other (Mainly Public) Services	38%	27%	31%	31%

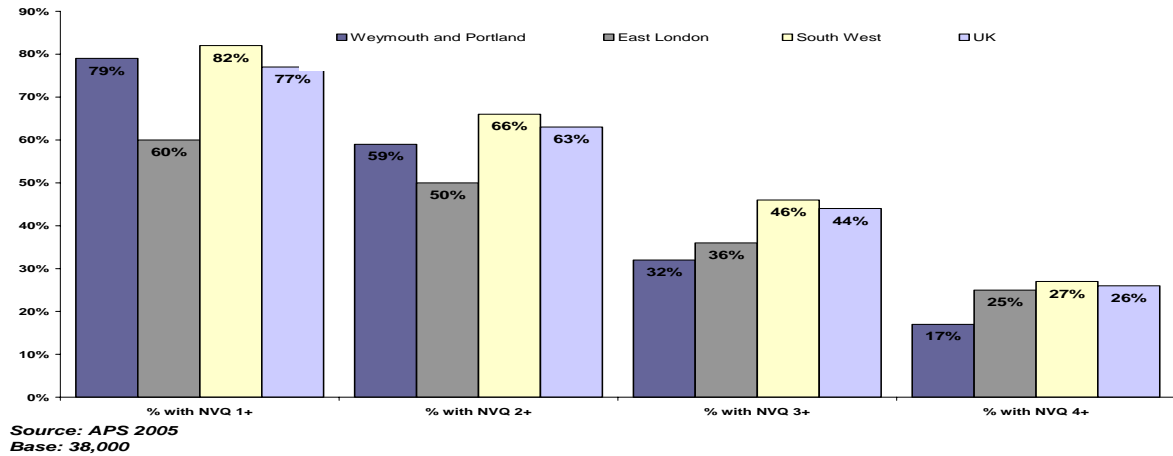
Source: Experian Business Strategies, 2006

2.2.3 Qualifications

Another striking difference between Weymouth and Portland and the 5 Host Boroughs is their qualifications profile. The qualifications profile of Weymouth and Portland is relatively low-skilled, probably reflecting the area's comparatively low-value industrial structure. The difference between Weymouth and Portland and East London is most distinct at NVQ Level One. 79 per cent of Weymouth and Portland residents have achieved NVQ Level One or above, a figure that is substantially higher than that for East London, where only 60 per cent of residents reached this level. A prominent point is the low proportion of Weymouth residents who are educated to NVQ Level 4 and above. Only 17 per cent have reached this level of

educational attainment, compared to 25 per cent in East London and 26 per cent nationally. A key point of difference, then, between Weymouth and Portland and East London, is that Weymouth and Portland has many fewer people with no qualifications but also many fewer people with higher level qualifications.

Educational profile of working age residents, 2005



2.3 LOCAL SKILLS ISSUES

It is important to understand whether and where employers have problems getting the skills they need (skills shortages), and indeed whether and where their current workforce lacks the skills needed to meet business requirements (skills gaps).

The table below details the skills shortages and skills gaps at both a local and national level. Around 3.5 per cent of businesses in Bournemouth, Dorset and Poole have skills shortages, which is low when compared to the figures for the South West (4.4 per cent) and England (5.1 per cent) – a positive sign for the local economy, although this may also in part reflect the low-level skills demanded by local employers.

Reported skills gaps in the South West region are in line with figures seen nationally: 15 per cent of establishments reported that they have staff who do not have the required set of skills in order to do their job effectively. This equates to a gap of 5 per cent when considered as a proportion of employment, a figure that is also in line with the national profile.

Skills Needs			
	Bournemouth, Dorset and Poole	South West	England
Population of Working Age (000s)	432	3,226	32,986
Establishments reporting hard-to-fill vacancies (%)	5.8	7.0	7.3
Establishments reporting skills shortage vacancies (%)	3.5	4.4	5.1
% of establishments with any staff not fully proficient (skills gaps)	/	15	16
Number of staff not fully proficient as a % of employment (skills gaps)	/	5	6

Source: Skills in England, 2005

Whilst the proportion of establishments reporting skills gaps nationally is 16 per cent, a number of Sector Skills Councils in sectors relevant to the staging of the Games have a higher proportion of skills gaps – particularly retail and hospitality, absolutely key sectors for the labour market impacts related to the 2012 sailing events:

- Skillsmart (retail) – 20 %
- People 1st (hospitality) – 20 %
- SkillsActive (sports) – 18 %
- Go Skills (passenger transport) – 14 %
- ConstructionSkills (construction) – 13 %

Source: Skills in England, 2005

Consultations in the locality highlight the severity of skills gaps in the hotel and catering industry³⁵. However, the problem is not just an apparent lack of customer service skills, but also a lack of recognition of the importance of skills amongst the local workforce and employers. The issues are multiple and intertwined; small businesses struggling to invest in upskilling, a seasonal workforce with a high turnover of staff, and an offer that is currently geared towards families and domestic tourists who are not high spenders. If the status quo is acceptable to local businesses, there is little or no incentive to enhance or invest further in skills development, better facilities, etc.

2.4 2012: SKILLS ISSUES

As detailed earlier, the 2012 sailing events will generate employment opportunities. However, there are opportunities to enhance further employment and skills opportunities with pro-action from local and regional partners – these opportunities are discussed later.

³⁵ Consultation November 2006.

2.4.1 The Games' demand for skills

Visitors to the region will draw on the local supply of skills directly, in return for goods and services. The demands from the Olympic Development Agency and LOCOG will call upon local skills indirectly.

Demand for skills can be divided into three broad areas:

- creating the built environment;
- staging the Games;
- showcasing the locality.

The table below provides the current qualification profile of key occupations encompassed within these areas to provide a proxy indication of the skill levels likely to be required in the build up to the 2012 Games. There are a number of key observations:

- There are limited entry-level opportunities in all areas.
- Generally, all areas require NVQ2+ qualifications.
- However, even areas which are often perceived to be lower-skilled (recreational activities, retail and hospitality, for instance) increasingly require NVQ3 qualifications.
- Indeed, almost one in five jobs in retail and hospitality tends to be NVQ4+ and two in five jobs in recreational activities tends to require these higher level qualifications.
- Creating the built environment also requires trade apprenticeship qualifications which take a number of years to achieve.
- This table shows the typical qualifications structure of sectors by key occupation in the South West, but the focus around the 2012 Games should be raising the bar in qualifications and skills levels generally, i.e., enhancing this typical qualifications structure rather than simply accepting it.

Typical qualifications structure of sectors by key occupation in the South West (%)							
	NVQ 4+	NVQ 3	Trade app	NVQ 2	NVQ 1	Other quals	No quals
Creating the built environment							
Construction	15	27	21	23	4	9	1
Public administration	46	21	2	25	3	2	1
Staging the Games							
Business activities	49	15	5	23	4	4	1
Transport	11	19	8	33	7	20	1
Recreational activities	37	21	3	23	6	8	3
Showcasing the South West							
Retail	17	23	6	41	7	5	1
Hotels and restaurants	16	28	5	33	6	11	1
All occupations	28	17	6	23	5	8	14

Source: Annual Population Survey, July 2006 to September 2006

2.4.2 Local skills and Games demands: the gap

On a purely quantitative level, the number of labour market opportunities that are likely to be generated by the 2012 sailing events in Weymouth and Portland, though substantial, should be met by the local labour market.

2012 labour demand and supply

Which jobs?	Identifiable gaps?
Creating the built environment	
Construction	Estimates of 2012 construction labour market opportunities vary widely if potential/planned developments indirectly linked to the sailing events are also taken into consideration. Local labour should be able to deliver the WPNSA upgrade but if other potential/planned developments all go ahead with similar phasing, pinch-points may occur. Construction labour market opportunities are likely to be filled by people already in the sector given the long lead-time for training in most construction occupations.
Staging the Games	
Business activities and administration	It is still not clear how many business/administration jobs will be directly generated by the 2012 sailing events in Weymouth and Portland. However, in general terms, 50% of these types of jobs tend to require the degree-level skills that the locality is severely under-represented in.
Transport, security and ticketing activities	There is no confirmation yet as to the number and format of transport, security and ticketing employment opportunities in the run-up to and during the 2012 sailing events. It is clear that a significant proportion of these roles will be filled by volunteers. A third of these opportunities tend to be filled by people with NVQ2 qualifications, which suggests that the local population will be able to fill these opportunities comfortably.
Recreational activities	Labour market opportunities in the sports and marine sector are likely to be fairly high in relation to the number of people holding specialist qualifications. A certain proportion of these posts are likely to be filled by Olympic and Paralympic regulars. One in two positions tends to require NVQ3+ qualifications, a level of skills generally under-represented in the locality. However, the WPNSA already employs around 80 individuals with similar qualifications on a full-time basis, so there is a strong base on which to build.
Showcasing the locality	
Retail	Retail positions are traditionally seen as entry-level and would provide many opportunities for the many residents with entry-level, NVQ1 qualifications. However, there are ongoing drives locally and nationally to raise skills levels in the retail sector with opportunities increasing at NVQ2, 3 and 4 – qualification levels in which Weymouth and Portland is under-represented.
Hotels, restaurants and tourism	Weymouth and Portland is already a visitor destination, and simply filling the employment opportunities likely to be generated by the 2012 sailing events should be possible. However, there is evidence that employers in the locality are increasingly drawing on migrant labour to fill positions. Moreover, a drive to enhance the local visitor and customer-service offer in the run-up to, during and post-2012 is likely to raise the bar in skills to include foreign languages, softer skills and the higher-level skills in which the locality is severely under-represented.

In conclusion, there are a number of key issues around the demand and supply of labour relating to the 2012 sailing events in Weymouth and Portland:

- In broad quantitative terms, local labour (Weymouth and Portland and wider Dorset) should be able to fill most of the opportunities directly generated by the 2012 sailing events.
- However, if the higher-end labour market impact scenarios are realised, pinch-points may occur.
- If all indirectly-related, potential/planned developments take place with similar phasing, there may be pinch-points in the construction labour market. As it stands, any pinch-point opportunities are likely to be filled by 'migrant' labour, i.e., labour from across the South West and UK *as well as* international migrant labour.
- If the higher, unofficial estimates of 70,000 visitors are realised (and if these are net, additional visitors and do not simply displace proportions of visitors who would otherwise have come), then for a short period during the summer of 2012, there will be hugely increased demands on the local area – not only in terms of labour but also accommodation, restaurants, local services, etc.
- Because these impacts are likely to be concentrated during a short period of time, it is important to demonstrate in advance to people working in or considering entering the sector that their skills will continue to be in demand after the sailing events. It is therefore important to encourage up-skilling in the locality in line with wider aspirations for Weymouth and Portland, i.e., aspirations to become a higher-value, international visitor destination and an important centre for marine and leisure.
- Finally, whilst meeting 2012-related labour requirements is important, this should not distract from the bigger priority. The locality is currently severely under-represented in higher-level skills (particularly at NVQ3 and above). There are rightly aspirations to use the unique opportunity that the 2012 sailing events provide to raise the locality's offer and profile in the long-term. But raising the bar in skills is an important component. Therefore, policies and interventions should be focused on raising skills-levels in the relevant sectors, enhancing skills in languages and customer-service, and encouraging progression through the qualifications system, over and above filling 2012 vacancies.

3 The local learning environment

3.1 INTRODUCTION

Hosting the 2012 sailing events is a huge opportunity for Weymouth and Portland, and indeed the wider South West region.

The challenge for the locality is to ensure that as much as possible is made of this opportunity.

The challenge has a number of heavily inter-dependent components, including:

- investment in infrastructure (Games-related and visitor-related);
- transport and accessibility;
- accommodation (Games-related, visitor-related and marine-leisure related);
- engagement with local business;
- place-marketing; and
- skills.

Skills are an important component in the run-up to and during the 2012 Games, and in the Games' post-2012 legacy.

A post-2012 Weymouth and Portland, with an international profile and enhanced market-share in marine leisure and tourism, will require people with higher-level skills in a range of sectors and occupations. The key sectors have already been identified as:

- construction;
- marine leisure and sports;
- retail, hospitality and tourism.

It is therefore important that the post-16 education and training provision in and around Weymouth and Portland and Dorset is able to accommodate this likely demand and address any skills gaps or shortages that may arise.

In brief, post-16 education and training will need to be focused on:

- raising the local population's qualification-levels to above NVQ1, where the locality is currently over-represented, to NVQ2/3/4+ where the locality is currently severely under-represented.

The sectors in which this education and training is likely to be most in demand are:

- retail, hospitality and customer service;
- marine leisure;
- business, with marine/leisure components where possible;
- languages;
- sports including marine, with competition administration components where possible (this includes building up a base of appropriately skilled volunteers for future competitions);
- construction, if potential/planned developments look likely to go-ahead.

3.2 CURRENT PROVISION

Workforce development and training is consistently highlighted within reviews of staging major sporting events. The challenge for 2012 will be ensuring that there are a range of relevant and transferable courses available to cater for demand and that these are applicable to the working world. Educational and training provision will need to meet both academic and vocational demands. It will also need to fill the skills gaps whilst installing the foundations of a skills legacy.

The table below details the proportion of working age residents who have attained NVQ Level 3 and Level 4 in a number of comparator areas. As discussed above, Weymouth and Portland has a lower proportion of residents who reach NVQ 3 and 4 than the 5 host boroughs, the South West region and the UK average.

Educational profile of working age residents, 2005				
	Weymouth and Portland	South West	Host Boroughs	UK
NVQ Level 3 +	32%	46%	36%	44%
NVQ Level 4+	17%	27%	25%	26%

Source: APS, 2005

There are six post-16 learning providers in the Bournemouth, Dorset and Poole area (there are other providers with campuses just outside the Dorset boundary such as Yeovil College). The Bournemouth and Poole College, Kingston Maurward College and Weymouth College cater for roughly 66,700 learners. Poole Borough Council, Dorset County Council and Bournemouth Borough Council provide post-16 education for around 17,700, bringing the total to just over 84,300. The table below details these six centres:

Post-16 Learning Providers in Bournemouth, Dorset and Poole*						
	Poole Borough Council	Dorset County Council	Bournemouth Borough Council	The Bournemouth and Poole College	Kingston Maurward College	Weymouth College
16-18	5%	4%	2%	33%	42%	42%
19 +	95%	96%	98%	67%	58%	58%
Total	3,787	9,821	4,101	40,155	9,830	16,669

Source: IRL (2006)

* Excludes work-based learning

These institutions currently provide a number of courses of relevance to the staging of the 2012 sailing events. The table below details the number of registrations for courses in a selection of providers. Broadly speaking, the 2012-related sectors described above in which education and training is likely to be most in demand are covered by different combinations of the providers.

Sectoral breakdown of post-16 learners in Bournemouth, Dorset and Poole*

	Bournemouth & Poole College	Bournemouth Borough Council	Dorset County Council	Kingston Maurward College	Poole Borough Council	Weymouth College
Engineering manufacturing technologies	319	0	9	0	11	83
Engineering	400	0	0	31	0	311
Manufacturing technologies	996	0	0	16	0	198
Transportation, operations and maintenance	171	28	304	0	99	229
Construction, planning, built environment	425	0	0	0	0	222
Building and construction	784	0	0	32	0	370
Business, Administration and Law	404	15	24	0	85	114
Retail and commercial enterprise	617	0	0	0	0	551
Retail and wholesaling	14	0	0	378	0	94
Hospitality and catering	785	7	27	915	0	167
Leisure, travel and tourism	559	0	0	0	0	22
Sports, leisure and recreation	549	0	19	247	35	1
Travel and tourism	319	0	9	0	11	83
Total	6,023	50	383	1,619	230	2,362

Source: IRL (2006)

* Excludes work-based learning

Work-based learning is also provided in Bournemouth, Dorset and Poole. The table below details the number of registrations for work-based learning in a selection of providers. Again, broadly speaking, the 2012-related sectors described above in which education and training is likely to be most in demand are covered by different combinations of the providers.

Sectoral breakdown of work-based post-16 learners in Bournemouth, Dorset and Poole

	The Bournemouth and Poole College	Kingston Maurward College	Locomotivon Ltd	Paragon Training	Westwind Limited	Weymouth College
Engineering	353	5	0	699	14	74
Manufacturing technologies	18	1	0	5	1	0
Transportation, operations and maintenance	68	0	2	426	0	77
Building and construction	574	30	0	38	0	92
Retail and commercial enterprise	16	1	0	406	0	0
Retail and wholesaling	188	0	2	158	0	16
Hospitality and catering	0	116	1,307	0	0	0
Sports, leisure and recreation	353	5	0	699	14	74
Total	1,217	153	1,311	1,732	15	259

Source: ILR (2006)

Important 2012-related sectors such as hospitality and retail are covered by learning providers, indeed Bournemouth and Poole College for example is a Centre for Vocational Excellence in these sectors, as well as being a provider of courses in 'business' languages such as Chinese and Japanese.

The table below maps the current educational and training provision for sectors relevant to the staging of the Games in Weymouth and Portland, against expected skill demand.

Current education/training provision in key 2012-related sectors

Sector	Typical skill-levels required	Current skill-levels in the locality	Main current provision
Construction	Medium	The locality is under represented compared to the South West	FE provision predominately through Bournemouth and Poole College and Weymouth College. Large work-based learning cohort at Bournemouth and Poole College.
Public administration and business activities	High	The locality is very under represented for high level skills	FE provision is spread across the majority of providers, with the largest cohort in Bournemouth and Poole College. There is no general work-based learning provision. FE provision is concentrated in Bournemouth and Poole College, although Weymouth College has a number of learners.
Travel and tourism	Medium	The locality is under represented	FE provision is spread across the majority of providers, with the County Councils providing for a number of learners. Paragon Training is the largest work-based learning provider.
Transport, security and ticketing	Low	Representative of skills in the locality	Bournemouth and Poole College and Kingston Maurward College are the main FE providers, whilst the latter also provides a large amount of work-based provision, along with Paragon Training. FE provision exclusively through the colleges, whilst Paragon Training is the largest provider of work-based learning.
Recreational activities	Medium to high	The locality is under represented	The majority of provision is through Bournemouth and Poole College and Kingston Maurward College. Work-based learning predominately through Locomotivation Ltd.
Retail trade	Entry/low to medium/high	Partly representative of skills in the locality	
Hotels and restaurants	Entry/low to medium/high	Partly representative of skills in the locality	

A commentary on some key 2012-related sectors is provided below.

3.2.1 Provision for the sports sector

As with all sectors, there are a variety of qualifications and accredited training pathways for those interested in a career in sport attaining. There is a structured qualification framework:

- at Level 1 there is only one option: active leisure and learning;
- at Level 2 there are eight options: activity leadership; coaching, teaching and instructing; instructing exercise and fitness; playwork; spectator control; operational services; sport and play installations; and mechanical play installations;
- at Level 3 there are five options: outdoor education; development training and recreation; coaching, teaching and instructing; spectator control and operations and development.

There are currently 13 Young Apprenticeship schemes in the country, although none of these are situated in the South West. The LSC (working with Skills Active) is looking to expand the number of schemes in the future, with the aim to use them as a precursor for the Level 3 Advanced Apprenticeship in Sporting Excellence (AASE) awards. There is also work to expand the selection of sports on offer, to include sailing and athletics.³⁶ However, the impact of the scheme depends on the sport and its requirement and demands. When considering sailing,

³⁶ Consultation, November 2006.

the Royal Yachting Association states that the typical age group for sailing training is 18 to 25, and has a more mature time scale than other sports, which means that sailing would be outside the remit of the AASE programme. However, providers in the South West are keen to push sailing within education.

The range of sporting qualifications has increased exponentially recently, suggesting the market is there for expansion. There are a number of issues associated with the provision of such qualifications from mainstream schools, such as the need for warm weather training for some sports. However, increased participation in sports will not only encourage learners to consider a career in the sector, but is also in line with wider lifestyle objectives.

There is a high level of staff turnover in the UK sports sector. Up to 2014, over 76,000 jobs will need to be filled as a result of people leaving their jobs, equating to an annual turnover of around 13 per cent. Perhaps because of this, the sports sector is very reliant on its volunteers. Estimates vary from 50,000 to over 500,000 active sports volunteers in the South West. Volunteers are concentrated into a few key occupations: a high proportion (67 per cent) work as coaches within their organisation, whilst officials (13 per cent) and non-managerial support staff (12 per cent) also account for a substantial proportion of the volunteer workforce. The UK Action Plan for Coaching states that the activity will play a significant role in contributing to a lasting and UK-wide legacy from 2012 and 2014.³⁷

Recruitment and retention problems are not exclusive to the paid sector, and volunteers have their own skills, training and knowledge needs. In the South West, there is a turnover of one fifth of volunteers each year compared to 8 per cent in England. The main reasons for difficulties in recruiting volunteers in the South West are cited as:³⁸

- potential volunteers not having time to take up this type of role;
- not enough people interested in the voluntary role;
- low number of volunteers with the required attitude, motivation or personality.

A readily available volunteer base will be important in Weymouth and Portland for the 2012 sailing events, but also in future if the 2012 events are able to set a precedent for hosting such events in the locality. Furthermore, if the locality's future visitor offer revolves more around active, healthy, sporty, leisure and marine pursuits, then there will be increasing demand for sports professionals and volunteers. Thus, the need for a coaching legacy that provides for these future events is made clear.

3.2.2 Provision for the marine sector

Individuals in the marine sector tend to specialise in particular areas and expand their experience, qualifications and abilities as time goes on. Appropriately qualified school leavers can choose to enrol onto a college course, such as BTEC Nationals and City & Guilds awards, then progress on to higher qualifications such as HNDs and degrees. An alternative is an apprenticeship with a company. An apprenticeship for the marine industry offers the individual a chance to experience boat building, marine engineering and engineering maintenance. At the same time, everyday skills that employers rely on, such as working with others and information technology are developed. Advanced skills in a specialist area will lead to a NVQ Level 2 or Level 3 (Advanced Apprenticeship). The individual could then go on to do a higher qualification such as an HNC or NVQ at Level 4.³⁹

³⁷ Sports Coach UK (2006) *UK Action Plan for Coaching: consultation draft*.

³⁸ SkillsActive (2006) *Regional Action Plan*.

³⁹ www.britishmarine.co.uk

There are currently 9 Further and Higher Education providers in the South West that offer marine-related academic and short courses and run apprenticeships. In addition to these, there are a small number of private sector providers in the region, which offer some marine and maritime related short-courses and others that act as facilitators or managing agents for the apprenticeship programme. The level of provision in the region is decreasing. 141 courses related to the sector were listed in 2001, but only 129 courses in 2003, which corresponds to an overall loss of 12 (8.5 per cent) courses.

Weymouth College is currently developing a contextualised sailing qualification entitled 'Sailing development and performance' that will be offered within the existing BTEC framework. At present, this is passing through the Qualifications and Curriculum Authority (QCA) accreditation process, and should be online in 2007/08. In 2008/09 provision will expand to allow learners to specialise in coaching, operations or yachting (subject to QCA approval). It is hoped that the new course will equip learners with the skills to actually work in, and contribute towards, a marine sector organisation, with its substantial work experience component. The focus will be on training individuals to be coaches or instructors, rather than just teaching sailing skills.

A QCA approved framework is advantageous in so far as the qualification would eventually be available to all, not exclusively provided to those in Weymouth and Portland. This breadth of provision would contribute significantly to the wider legacy effect. However, a unique selling point for the course provided through Weymouth College will be the venue: the Weymouth and Portland National Sailing Academy.

3.2.3 Provision for the tourism and hospitality sector

Around 40 per cent of tourism businesses in the South West region have links with education, in line with the Dorset average. The highest proportion of these links is through schools, with work experience the most common activity on offer. One new initiative in addition to more traditional provision is a project by SWRDA, Bournemouth University and Bournemouth and Poole College, who are working together on a £40m project to create a new, 4-star hotel school to take up to 60 student placements on new foundation degree course, as well as students on other hospitality courses. This will be the first fully commercial teaching hotel in the UK, and together with the refurbishment of the adjoining Conference Centre hopes to provide the most modern conferencing and hospitality complex in the UK.

Many tourism businesses do not have education links nor participate in careers events. Although it is recognised by many in the industry that such activities are crucial to building a future workforce, the reality is that most businesses believe that they do not have the time or the resources to contribute in this way – it is the skills shortages affecting the business in the immediate term that receive attention.⁴⁰ Employers in the hospitality and travel industries do take on around 25,000 new apprentices every year in the UK. Most apprentices are aged 16-19, but the scheme is open to candidates aged up to 25. However, consultation evidence suggests that there is little uptake of apprentices by employers in the South West. Around 85 per cent of hospitality businesses are classed as micro-businesses, who believe they cannot afford to take on apprentices for financial or resource reasons. Instead, the demand is for individuals who already have a well established skills set (this is particularly important given the generally high labour turnover in the sector, and the seasonal nature of the market).⁴¹ Working with local businesses to find ways to get around these barriers will be essential to the success of raising customer service in Weymouth and Portland up the value chain.

⁴⁰ Tourism Skills Network South West (2004) *Workforce Development Plan*.

⁴¹ Consultation, March 2007.

4 2012: the challenge

4.1 INTRODUCTION

Hosting the 2012 sailing events is a huge opportunity for Weymouth and Portland, and the wider county and region. But the benefits are potential only and cannot be taken for granted.

It will be important for local policymakers and businesses to use 2012 to take forward wider aspirations for the area, rather than seeing the sailing events as an end in themselves.

Local people and local businesses are unlikely to invest heavily in themselves if they believe it is only for a one-off occasion. But they are much more likely to do so if they perceive the 2012 sailing events as one of many stepping-stones to making Weymouth and Portland a more successful, more prosperous and more sustainable place to visit and in which to live and work.

There are two easily identifiable challenges for the locality in the context of the 2012 sailing events:

- enhancing Weymouth and Portland's offer to visitors and residents;
- putting Weymouth and Portland "on the map", nationally and internationally.

The Olympic Games and Paralympic Games themselves will bring visibility to the locality and the wider county/region. They will also help to encourage local people to evaluate their own ambitions and assets, whilst the world's eye is turned towards them.

The challenge is in ensuring that in the future the 2012 sailing events are seen not as a missed opportunity for the locality but as an important milestone in a broader revitalisation.

4.2 ENHANCING WEYMOUTH AND PORTLAND'S OFFER AND PROFILE

The UK has the fifth largest tourism industry in the world. The South West attracts over 20 million visitors each year, who contribute £8 billion to the regional economy.⁴² However, the tourism and hospitality industry within the South West is under constant pressure to stay competitive from both overseas destinations and other UK destinations. Changes in lifestyle, such as more foreign travel, upgrading homes and expectations in food choice means that consumers require more sophisticated and higher quality services, which necessitates an increasingly professional and qualified staff base.⁴³ Thus, the industry is responding in the respect of product quality and services, and through the use of the internet⁴⁴.

The idea of using the Olympic Games and Paralympic Games as leverage for tourism development is a relatively new phenomenon, most notable when Sydney hosted the Games in 2000 and published a coordinated leveraging strategy for its tourism industry. Previously, host countries had mainly invested tourism marketing dollars in Olympic-related advertising. To approach development and investment in this way represented a subtle shift in thinking, where the Games were seen as an opportunity to implement tactics to foster the impacts desired.⁴⁵

⁴² www.swrda.org.uk

⁴³ Tourism Skills Network South West (2004) Workforce Development Plan.

⁴⁴ Tourism Skills Network South West (2006) *Skills 2015 research projects*.

⁴⁵ Chalip, L *Using the Olympics to optimise tourism benefits* University of Texas.

This is already recognised in the South West region. In order to capitalise on opportunities presented, South West Tourism has identified 3 strategic aims in order to deliver the tourism vision and give the industry the recognition it deserves:⁴⁶

- driving up quality;
- delivering sustainable tourism;
- creating superior destination management arrangements.

Improving the quality of the local offer to tourists requires inter-linked action on the range of issues identified earlier, namely:

- investment in infrastructure (Games-related and visitor-related);
- transport and accessibility;
- accommodation (Games-related, visitor-related and marine-leisure related);
- engagement with local business;
- place-marketing; and
- skills.

The locality has remarkable natural assets, including its protected waters and the Jurassic Coast. But there are barriers to making the most of these natural assets. The local population itself is not of sufficient size to drive the tourism and leisure market, so the locality is dependent on national and international tourists if it is to increase its size and market-share. However, the locality is relatively distant from large population concentrations compared to competitor locations in the UK. Moreover, perceptions of poor accessibility (which the Weymouth relief road is meant to combat) make these barriers even worse.

Making the most of the locality's natural assets to become a marine and leisure destination depends on having:

- appropriate, high-quality facilities for mooring;
- appropriate, high-quality hotels and restaurants;
- trained staff and high levels of customer service excellence;
- quality provision of training for new sailing and sports enthusiasts; and
- entrepreneurs with the skills and initiative to service higher numbers of higher-spending visitors.

Providing the above clearly requires a wide range of local expertise and collaboration. This includes local businesses, particularly those operating in the hotels and restaurants sector.

To provide an example, there are currently 20,000 accommodation options in the South West, ranging from waterfront hotels and penthouse apartments, guesthouses and farm cottages to campsites and youth hostels. Weymouth and Portland currently has just over 7,000 bed spaces, equivalent to 12 per cent of the Dorset supply.⁴⁷ In the peak tourist months of July through to September, overall occupancy rates in Dorset reach over 70 per cent (interestingly, the more expensive rooms enjoy higher rates of occupancy, regularly reaching 75 per cent). Because hotels are currently enjoying some success under the status quo, it may be more difficult to persuade them of the benefits of investing in up-skilling their staff and improving their offer.

More generally, the dynamics of sports participation (particularly sailing) are changing. The increase in the 'mini-break' has had a huge impact, whilst advances in technology have widened participation and accessibility. Lighter and more sophisticated boat-building materials mean that

⁴⁶ South West Tourism (2006) *Towards 2015: shaping tomorrows tourism*.

⁴⁷ Experian Business Strategies (October 2006), *Economic advice on potential mixed use development in Weymouth – confidential report*.

more women can now participate. As a result of this, both the national and international market for sailing and marine leisure is growing.⁴⁸ Around 3.7 million adults participated in some form of recreational sailing activity in 2006, which represents a national participation rate of 7 per cent. When broadening the criteria to include any watersport activity, this figure rises to 13.8 million, which equates to 28 per cent, or just over a quarter of the UK adult population.⁴⁹ There is an established marine sector in the South West. The marine leisure industry in the South West generates £639.5 million of revenue (23 per cent). When combined with the South East, the South accounts for 60 per cent of the total UK marine market.

Weymouth and Portland is widely regarded as an important marine destination, primarily due to its excellent sailing waters. In the context of the marine sector, the two big opportunities around hosting the 2012 sailing events are:

- using the huge publicity to establish the locality as one of the top UK destinations for marine leisure activities;
- using the successful staging of the sailing events to establish the locality as an important destination for future marine competitions.

4.3 PROMOTING UP-SKILLING AND INCLUSION

The labour market context in Weymouth and Portland could not be more different from that in the 5 Host Boroughs. In East London, policymakers are focusing on the opportunities presented by the 2012 Games to tackle worklessness. However, in Weymouth and Portland, it is much more important to focus on raising skill levels above NVQ1 to tackle the locality's poor skills profile.

However, there are still issues in Weymouth and Portland that need to be recognised. There are pockets of inactivity, and barriers to employment including lack of childcare and transport. In addition, the local population of pensionable age is much higher than in East London or the regional and national average. Therefore, the 2012 sailing events also offer opportunities to involve people currently unemployed or inactive through the pre-volunteering programme or targeted interventions with characteristics similar to those identified in Experian's *Employment and skills for the 2012 Games: research and evidence* report:⁵⁰

- start implementing training and recruitment schemes up to 2 years in advance;
- encourage participating employers to provide case-study evidence of positive outcomes and benefits, to create a snow-ball effect with other employers;
- encourage employers to demonstrate a commitment to the local area by forming partnerships with local schools;
- work with schools, colleges and universities to develop vocational pathways;
- focus on the segments of employment opportunities where local people have a realistic chance of gaining work;
- for long-term unemployed, use mechanisms to reduce the risks to employers while giving individuals the chance to build and demonstrate their capabilities and skills.

⁴⁸ Consultation, February 2007.

⁴⁹ Consists of surfboarding, angling from the shore, angling from a boat, outdoor swimming, leisure sub aqua diving, cliff climbing, coastal walking, leisure time on the beach and kitesurfing.

⁵⁰ *Employment and skills for the 2012 Games: research and evidence* (2006), Experian for London LSC and LDA. Accessible at <http://readingroom.lsc.gov.uk/lsc/2006/research/commissioned/nat-employment-and-skills-for-the-2012-games-research-and-evidence-jun-2006-main-report.pdf> or <http://www.lda.gov.uk/server/show/ConWebDoc.1646>

Some of the 2012-related impact sectors are currently witnessing significant levels of migrant labour employment.⁵¹ Employers will continue to turn to migrant labour if it meets their requirements. The aim of public sector bodies must be to help local people to gain the skills required to make them competitive in a 21st Century labour market.

This focus on raising skills in the local population is an important one. It is a key component not only in successfully delivering the Games but in creating a 2012 legacy, i.e., leaving Weymouth and Portland with the skills it requires to turn itself into a competitive, sustainable, high-value destination for visitors and residents.

A skills legacy is likely to encompass the following:

- the creation and implementation of sector-related schemes that will promote viable, attainable career pathways and encourage flows into these sectors;
- the provision of accredited training courses that are applicable to the demands of the job, providing learners with transferable skills and supporting retention;
- utilising the demand for volunteers in the staging of the Games in order to capitalise on current skills sets in the local area, e.g., the language and customer service skills of pre-retirees;
- exploiting the momentum and motivation generated in the run-up to the Games in order to re-engage long-term economically inactive and hard-to-reach residents;
- the formation of intra- and inter-regional alliances between local businesses and providers, in order to channel suitably skilled learners into positions and prevent qualification wastage.

The preparations for a legacy do not begin in 2012, they begin now. Indeed, they will need to build on the succession of preparatory camps and 2010/2011 test events to establish a momentum with local businesses, residents and education/training providers that is sufficient to catapult the locality into 2012 and beyond.

4.4 A 2012 LEGACY

A 2012 legacy for Weymouth and Portland depends on a range of stakeholders – residents, businesses and public agencies – pledging themselves to future excellence. LOCOG’s vision is to “stage an inspirational Games that captures the imagination of young people around the world and leave a lasting legacy”.⁵² Legacy is the product of what remains after the Games have ended and is considered to be an overarching objective within the South West Strategic Framework.⁵³

Team South West have drafted their ‘2012 Legacy Strategy’, which lists a number of tangible benefits, such as improved infrastructure, new partnerships and increased levels of participation. Their vision for the South West is to achieve a lasting and discernible community legacy from the 2012 Games, with the momentum continued past 2012 and towards 2016. The objectives within the legacy have been separated into 5 strategic flames:

1. Business Development
2. Tourism and Regional Image
3. Sporting Opportunity
4. Cultural Celebration
5. Community Involvement

⁵¹ Roe, P (2007) *Skills Issues in Priority Sectors in Bournemouth, Dorset, Poole and Somerset* LSC and BMG Research.

⁵² London Organising Committee of the Olympic Games.

⁵³ Nations and Regions Group (2006) *South West Strategic Framework*.

There are a number of skill-specific regional objectives, including a wish to improve the skills base in the tourism sector through specific targeted intervention and development of programmes. The final flame, community involvement, encompasses two specific areas where real and lasting differences can be made: skills and volunteering.

It is highlighted within the strategy that the staging of the sailing events can only be delivered by individuals with the right skills. The inclusion of those in schools, further and higher education and hard to reach groups is also flagged up. Ways in which these targets can be achieved include:

- workforce development through ‘Train to Gain’, ‘SkillsActive’ and the Tourism Skills Network;
- closing the identified skills gaps; and
- developing the structure to regionally recruit and train volunteers to the Games (including the PVP).

To deliver the legacy in Weymouth and Portland and the wider county/region, it is important to recognise both the synergies and the differences between the locality and the 5 Host Boroughs. Clearly, the 2012 Games are the all-encompassing, unifying event that binds together both areas. But the big differences between the two areas where the individual events will play themselves out are:

- London is one of the most well-known and highest-profile cities in the world, whereas Weymouth and Portland is currently a destination which serves a predominantly domestic market;
- the 5 Host Boroughs have high levels of ethnic diversity and a relatively youthful population, whereas Weymouth and Portland is predominantly white and over-represented by people of pensionable age;
- the 5 Host Boroughs are characterised by high levels of deprivation and worklessness, whereas Weymouth and Portland is characterised by fairly high levels of employment and activity, albeit in low-skilled, low-value sectors;
- the 5 Host Boroughs are over-represented by people with no qualifications, whereas Weymouth and Portland are over-represented by people with NVQ2+ qualifications.

In Weymouth and Portland, the legacy focus should therefore be on putting the locality “on the map” whilst moving it up the value-chain. The aim should be to use the 2012 sailing events to meet broader local/county/regional objectives for the retail, hospitality and marine sectors – helping to make and market the locality as a healthy, active, quality place to visit, and in which to work and live.

There are many inter-linking strands to this, so the 2012 legacy will need to be delivered by a partnership of communities, business and the public sector. Skills is a key component. There will need to be appropriate, flexible, quality provision of education and training in hospitality/customer services, marine leisure, business administration and languages. It will also be important to encourage (and remove barriers to) entrepreneurship, since attracting a higher-share of the higher-spending tourist market will require people who can both make and take opportunities that present themselves in future.

The opportunities of the 2012 sailing events are huge for a place such as Weymouth and Portland, but they are potential only – they cannot be taken for granted. Key 2012-related sectors (hospitality, retail, sports and marine leisure) are already strong locally and regionally. But the local offer is currently low-value compared to competitor locations in the UK and indeed internationally. This needs to change and 2012 is one step towards this.