WORKING IN FITNESS

An analysis of the dance fitness industry in the UK

2015

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The Working in Fitness Survey is a key source of information on the fitness industry across the UK. Whilst *some* national data is available for the industry, the Working in Fitness survey is able to report on a much wider number of variables at a greater level of detail. This is the 10th Working in Fitness survey to be conducted, and explores a range of issues, from salaries and working conditions through to professional membership and future expectations of staying in the industry.

The key objectives of the research are:

- To explore the composition of employment in the sector, examining full-time/part-time employment and self-employed roles;
- To gather information on salaries and terms and conditions across occupations in the fitness industry;
- To monitor levels of qualifications, training and professional development amongst employees;
- To examine satisfaction with current position, remuneration and development, as well as
- To explore motivations and barriers to seeking / continuing with a career in the sector

The Exercise Movement and Dance Partnership (EMDP) had some further objectives of the research. These included:

- To understand what dance styles are most popularly taught
- Identify new and emerging trends in dance fitness
- Understand dance exercise teacher behaviour, including:
    - The number of classes taught per week
    - The number of participants per class
    - The age profile of participants in classes taught
    - Barriers to maintaining classes and participant numbers
    - Areas where teachers may need support in maintaining classes

- Understand awareness of EMDP in the wider fitness population
- Understand what barriers might stop people from teaching dance fitness

The Composition of the sample

In many ways, this sample of fitness professionals is very different from other sectors of the economy. It is dominated by females (67 per cent) and has a high incidence of self-employment (62 per cent). Dance Fitness professionals are even more likely to be self-employed (81 per cent). These figures compare to all-sector averages of 47 per cent and 15 per cent respectively. However, the age profile of the sample is broadly similar to the national average.

As well as Dance Fitness professionals, this year's survey represents 25 different occupations, ranging from senior management roles right through to students who work in the sector whilst studying. Survey respondents are most likely to work at public leisure centres (20 per cent), Community centres/Village Halls (17 per cent) or else at chains of private fitness clubs or private gyms/studios (14 per cent and 11 per cent respectively).

Dance Fitness trends

This survey represents teachers who teach Dance Fitness as their main and only role in the fitness industry as well as those who teach other fitness activities. For example, nearly a half of Group Exercise teachers also teach some Dance Fitness in their classes (45 per cent). In total, this survey represents teachers who teach 1,700 classes between them in an average week, accounting for 25,000 people with an average of 15 people in each class.

A majority of Dance Fitness respondents think that Zumba is currently the most popular dance style. However, opinion is much more divided on what style is increasing the most in popularity. The most popular answer was Fit Steps due to its exposure on television shows, but Zumba is closely behind. People are most likely to say that Zumba is the style decreasing in popularity.

Looking to the future, a third of Dance Fitness teachers (32 per cent) say that they don't plan to teach anything new, but work with their existing clients. People are most likely to say that low income from their classes and PPL costs will impact on their class sustainability.

Salaries and benefits

The average salary of respondents to this year's survey is lower than the median salary of employees across all sectors of the economy. The average full-time salary of respondents is £22,700, an increase from the £21,000 reported last year. However, this is lower than the national average full-time median salary of £27,200. However, the average median part-time salary of respondents is higher than the national average. The average part-time salary is £14,500, up from the £13,800 reported in 2012 and higher than the £9,000 national average. The average freelance salary is £20,800, which is very similar to the £20,600 reported the last time the survey was conducted.

With regard to gender differences, the data also shows that women working full-time earn 97 per cent of their full-time male counterpart's salary. Likewise, female part-time workers earn 96 per cent of the average male part-time salary. This is different to the national picture, where women working full-time earn only 81 per cent of a full-time male salary, but more than a male part-time salary (105 per cent).

Only a fifth of respondents overall have had a pay rise in the last year. Dance Fitness respondents are less likely than this to have received a rise (15 per cent). This means that many may have seen their real terms pay decrease over this time period, given the positive rate of inflation. Only 1 per cent of Dance Fitness professionals receive either commission or a bonus on top of their salary.

Qualifications, Training and Development

The high proportion of self-employment reported above means that a majority of people pay at least something towards their own training costs (84 per cent). This rises to 95 per cent of Dance Fitness respondents. This may go some way to explaining why across all occupations, 11 per cent of respondents haven't undertaken any training in the last year and why a fifth of respondents say that they do not plan to train at all in the coming year. Indeed, the biggest barrier to training is cost – 57 per cent of Dance Fitness teachers say cost is a barrier to them.

A large majority of people feel that they have had sufficient training to do their job (83 per cent across all occupations and 90 per cent of Dance Fitness teachers). However, most still plan to train. Those that *do* plan to train are most likely to say they will train at level 3 (58 per cent overall and 62 per cent in Dance Fitness), whilst a quarter plan to train at Level 2 and about a third plan to train at Level 4. Interestingly, professionals are more likely to be planning to undertake training with the kind of client that they already work with as opposed to new types of client.

The biggest training gaps are found with specialist populations, such as those with cancer, neurological illnesses, strokes and mental health issues.

Satisfaction and future plans

This survey represents the views of people who have been in the fitness industry for a significant amount of time - 40 per cent have been in the sector for more than 10 years whilst a further fifth have been in the sector for between 5 and 10 years. Moreover, nearly two thirds (62 per cent) say that they plan to stay in the industry for more than 5 years.

Professionals say that they are most likely to have joined the industry because they have a passion for fitness (70 per cent). They also say they came into the sector because they wanted to be a help to other people (44 per cent).

With regard to their job satisfaction, it is not surprising that in the current economic circumstances, people who are employed are least satisfied with their remuneration package, their prospects for progression and their level of job security. Those who are employed are most satisfied with their degree of responsibility and their current employer.

The top three reasons given as to why people will leave the sector are either directly or indirectly related to income. The most oft cited reason given is the low income earned in the sector (45 per cent) followed by a lack of new clients (31 per cent) and rising costs (27 per cent).

1 Introduction

This report presents the findings of the Working in Fitness Survey, a confidential online survey conducted in the autumn of 2014. This survey provides a unique opportunity to gauge the views and opinions of the fitness workforce across a range of occupations in the sector. It is conducted annually by SkillsActive and the Register of Exercise Professionals. This year, the Exercise, Movement and Dance Partnership also collaborated in the research.

1.1 Background to the research

The Working in Fitness survey is open to all those working in the fitness industry, whether this is on a full-time, part-time or self-employed basis. It is also open to seasonal, casual and volunteer staff. The questionnaire is reviewed each year to incorporate respondent feedback and improve the user experience. The project was publicised extensively through SkillsActive, REPs and EMDP media and trade press and was promoted through industry networks. This report is based on 1,810 responses, the most ever for a Working in Fitness survey. We thank all those who took the time to promote and participate in this year's survey.

1.2 Sampling and methodology

This was an online survey conducted between October and December 2014. The survey was open to all those employed in the fitness industry. An incentive was used to encourage participation. The survey was promoted in the industry press, through e-zines and networks. Regular reminders were sent out to encourage participation. The questionnaire was based on the design used in previous years but with improvements to questions and the user interface based on feedback from former respondents. A copy of the questionnaire can be found in the annex.

The results of the Working in Fitness survey are unweighted. The survey is a self-selecting sample and therefore it is not necessarily representative of the actual population. To interpret the results appropriately the profile of respondents is examined in the next section.

1.3 EMDP Founder members vs non founder members

Those who teach Medau Movement, Bagot Stack and KFA are considered to be 'founder' members of the Exercise, Movement and Dance Partnership. Anecdotal evidence would suggest that these teachers have a different profile to teachers of other dance styles. Therefore, throughout this report, any teachers who teach any of

these styles have been categorised together and called ‘founder’ EMDP members. They are contrasted to teachers of all other styles, labelled ‘non-founders’.

2 Workforce Characteristics

Key points

- This year's Working in Fitness survey sample is predominantly female (67 per cent) and predominantly self-employed (62 per cent). This increases to 81 per cent of Dance Fitness teachers. Both of these former figures are much higher than the national average for all sectors of the economy.
- The age profile is a little older than both the SkillsActive and national averages. The Dance Fitness founder members are more likely to be in the older age brackets than the non-founder members.
- The top three places for people to work are public leisure centres, community centres / village halls and private fitness club chains. Dance Fitness professionals are most likely to work at community centres, but again this is driven by founder members – non-founder members are working in a range of places.
- The majority of those who are employed attend one place of work (62 per cent)

This section of the report looks at the characteristics of the sample of those who responded to this year's Working in Fitness survey. Understanding the composition of the sample is important, as it can help us to interpret the answers given to other questions in the survey.

2.1 Profile of the workforce

Table 2.1 shows the characteristics of the sample responding to this year's Working in Fitness survey. The following points are worthy of note:

- Two thirds (67 per cent) of the sample is female. As shown by Figure 2.1a, this ranges from 47 per cent of Personal Trainers through to 96 per cent of those working in Dance Fitness. This is much higher than the SkillsActive (46 per cent) and national (47 per cent) averages[1].
- There is a broad spread of age ranges represented. Numbers peak in the middle age groups and tail off at the younger and older ends. The sample has less people distributed towards the younger age groups than both the SkillsActive and national averages. The SkillsActive workforce as a whole has

[1] See *SkillsActive, a summary of indicators*, June 2013 and Labour Force Survey, 4 quarter average, 2014.

approximately half of its workforce below the age of 34 (51 per cent), compared to 28 per cent of those responding to this survey[2].

- Just under 80 per cent of respondents are white British. This is exactly the same proportion as the 2012 survey.

Table 2.1a Characteristics of the workforce

		%	% UK*
Gender	Male	33%	53%
	Female	67%	47%
Age	16 – 24	7%	12%
	25 – 34	21%	22%
	35 – 44	27%	22%
	45 – 54	26%	24%
	55 – 64	14%	15%
	65 +	6%	4%
Ethnicity	White - British	79%	81%
	White – Irish	2%	1%
	White – Other	9%	6%
	Mixed - White & Black Caribbean	1%	<1%
	Mixed – Other	1%	<1%
	Asian/ Asian British - Indian	1%	3%
	Black/ Black British - Caribbean	2%	<1%
	Black/ Black British - African	1%	2%
	Other	1%	5%
	Prefer not to say	3%	0%
Disability	Has a disability	10%	12%
	No disability	90%	89%

N=1,810 *Source: LFS, 4 quarter average, 2014.

Figures 2.1a and 2.1b shows graphical representations of occupation by age and gender. Dance Fitness professionals are most likely to be over 65 (28 per cent), whilst Gym Instructors are most likely to be under 34 (48 per cent).

[2] *Ibid.*

Figure 2.1a Occupation by gender

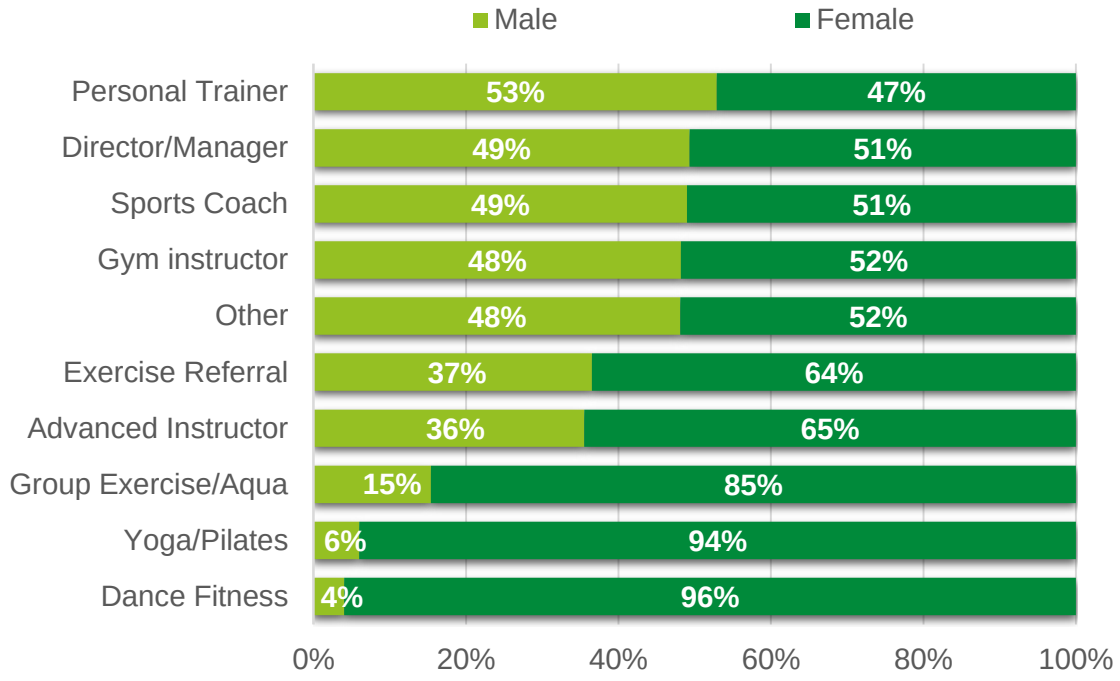
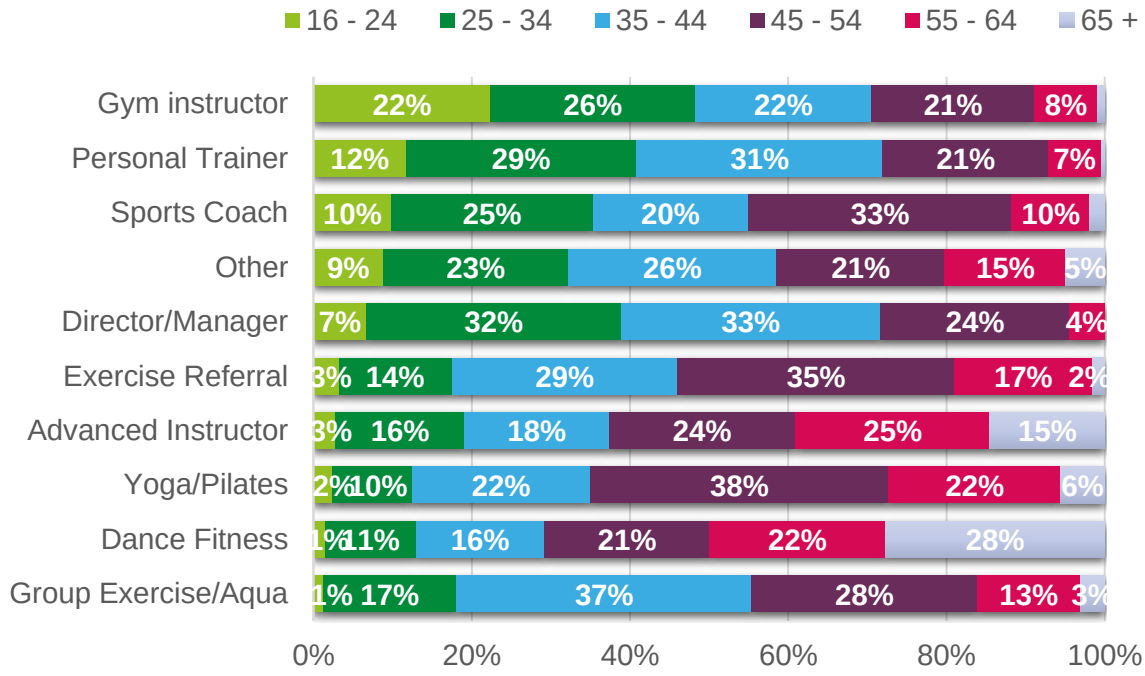


Figure 2.1b Age by occupation

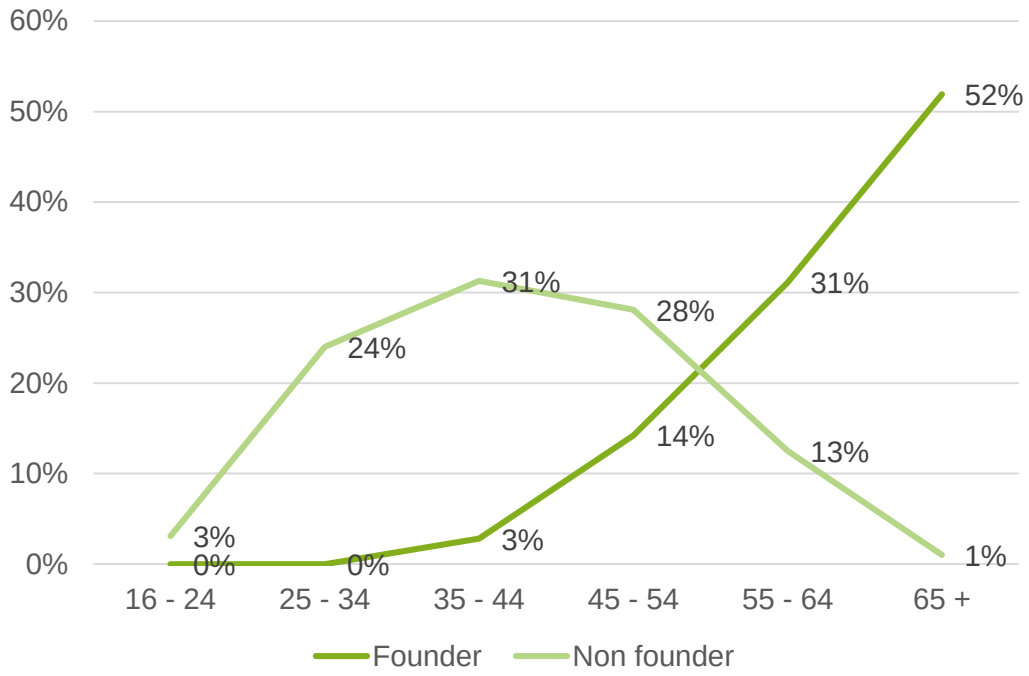


2.1.1 Founder vs non founder members

The above figures show the profile of the dance fitness workforce as a whole. However, as described earlier, it is assumed that EMD founder members and non-

founder members have a different demographic profile. Figure 2.1b shows that for age, this hypothesis has some credibility. It shows that founder members are much more likely to be represented in the older age brackets, and non-founder members are much more likely to be younger. Indeed, over a quarter of non-founder members are below 35 (27 per cent) compared to founder members who have nobody in this category.

Figure 2.1c Age profile – founder members vs non founder members



2.2 Main Occupation

Table 2.2a shows the range of occupations represented in this year's survey. It shows the respondent's *main* occupation. Some fitness professionals work in more than one role, but we are concentrating here on their main role.

Personal trainers are the largest occupational group, making up a quarter of the sample. After this, only four occupations represent more than 10 per cent of the total responses. Dance Fitness teachers account for 202 responses, or 11 per cent of the sample.

Table 2.2a Main Occupation

	Count	%
Personal Trainer (Level 3)	446	25%
Group Exercise and Aqua Instructor / Teacher (Level 2)	260	14%
Yoga and Pilates Teacher	249	14%
Dance Fitness/Exercise, Movement and Dance Teacher	202	11%
Gym Instructor (Level 2)	112	6%
Advanced Instructor (Level 3)	110	6%
Other	64	4%
Exercise Referral/ Clinical Exercise/ Active Programme Manager	63	3%
Sports Coach	51	3%
Studio or Fitness Manager/ Supervisor/ Team or Group Leader	37	2%
Club/ Duty Manager	36	2%
Physical Training Instructor	35	2%
College Lecturer/ Teacher	27	1%
General Manager	23	1%
Director	18	1%
Assistant (club) Manager	11	1%
Leisure Attendant/ Assistant	10	1%
Student	10	1%
Group/ Area/ Regional Manager	9	0.5%
Sports/ Physiotherapist	9	0.5%
Frontline/ Customer service/ Receptionist	8	0.4%
Swim Teacher	6	0.3%
Membership, Marketing or Sales Manager	5	0.3%
Voluntary Sector Worker	5	0.3%
Lifeguard	4	0.2%

N=1,810

Only those occupations with a sample that is greater than 50 will appear in the subsequent tables in this report. Managerial positions have been grouped into a management category, whilst all other occupations will be classified as 'other'. Table 2.2b lists these consolidated occupations.

Table 2.2b Consolidated occupations

	Count	% of total	Full-time	Part-time	Self-employed
Personal Trainer	446	25%	10%	7%	79%
Group Exercise/Aqua	260	14%	4%	21%	64%
Yoga/Pilates	249	14%	3%	8%	85%
Dance Fitness	202	11%	1%	13%	81%
Other	183	10%	28%	19%	39%
Director/Manager	134	7%	71%	11%	14%
Gym instructor	112	6%	20%	31%	19%
Advanced Instructor	110	6%	16%	23%	60%
Exercise Referral	63	4%	46%	32%	16%
Sports Coach	51	3%	18%	15%	67%

N=1,810

2.3 Employment status

A majority of the sample are self-employed in their main fitness role (62 per cent). This high level of self-employment is characteristic of much of the fitness industry. With regard to self-employment by occupation, the table above shows that:

- those teaching Yoga/Pilates, Dance Fitness and Personal Trainers are the most likely to be self-employed (85 per cent, 81 per cent and 79 per cent respectively).
- after Managers, Exercise Referral practitioners are most likely to be employed full-time (46 per cent).

It is also worthy of note that nearly a quarter of Sports Coaches (24 per cent) are employed either on a seasonal basis or else as a volunteer.

Table 2.3a Employment status

	Count	%
Employed permanent full time	281	16%
Employed permanent part time	266	15%
Self-employed / freelance	1,118	62%
Contract / agency labour	16	1%
Seasonal/ casual/ holiday worker	64	4%
An unpaid volunteer	32	2%
Other	33	2%

N=1,810

2.4 Employment sector

The high levels of self-employment means that a majority of the sample are employed in the private sector. Three per cent of the sample said something other, such as Higher Education Institutions, Local Authorities and other bodies such as trusts. Others said that they were currently studying.

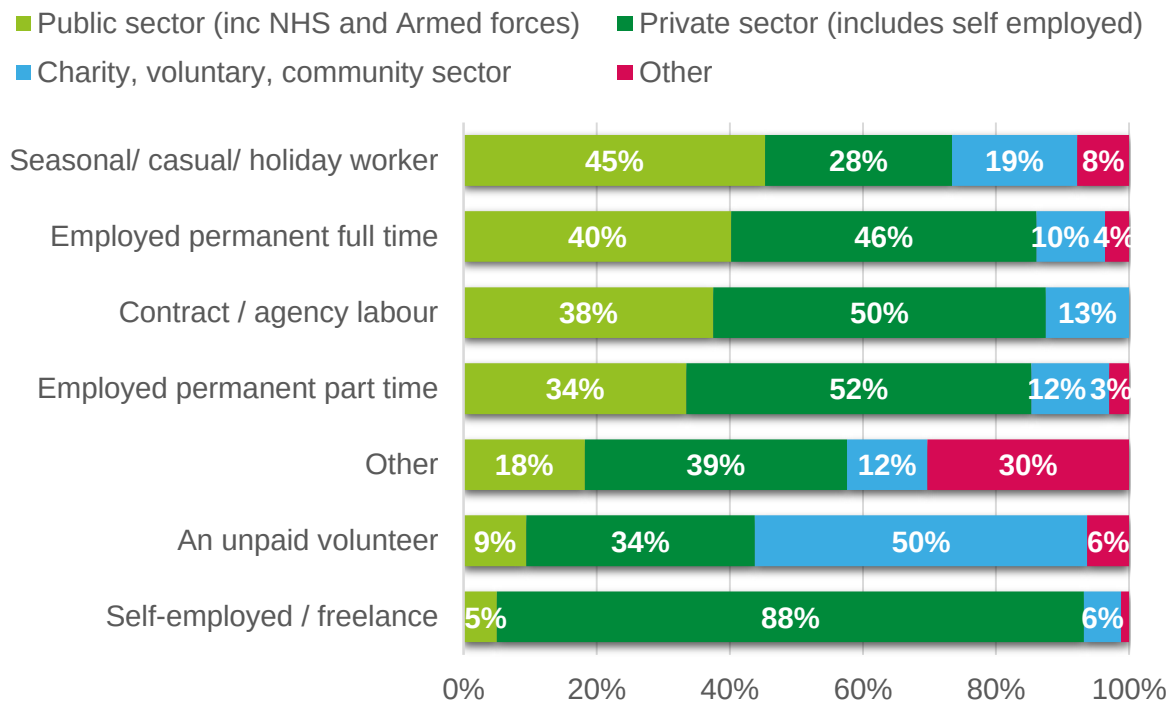
Table 2.4a Employment sector

	Count	%
Public sector (including the NHS and Armed forces)	302	17%
Private sector (includes the self- employed)	1,303	72%
Charity, voluntary, community sector	157	9%
Other	48	3%

N=1,810

This is confirmed by Figure 2.4a. It shows that 9 out of every 10 self-employed workers are operating in the private sector, whilst this is only true for approximately half of those working full-time and part-time.

Figure 2.4a Employment status by employment sector



2.5 Main place of fitness work

We asked respondents to identify their main place of work. Overall, as with previous surveys, public leisure centres are the most popular response, attracting a fifth of the responses. In previous years, private fitness club chains has formed the second largest category. This year, however, it is community/village halls that attract the second largest proportion of responses. This is driven by 56 per cent of dance fitness professionals who say that this is their main place of work.

As in previous years, the remaining places of work are spread across a range of locations, as shown in the figure below.

Table 2.5a Main place of work

	Count	%
Public leisure centre	359	20%
Community centre / village hall	302	17%
Chain of private fitness clubs	248	14%
Private gym or studio	202	11%
Private home	140	8%
Independent club	125	7%
Education and training (schools, colleges, universities)	82	5%
Other	79	4%
Public open spaces	78	4%
Multi sports club / centre	73	4%
Hotel based club / chain	35	2%
Sports clubs (including NGB or CSP)	29	2%
Workplace club	26	1%
Armed forces	11	1%
Hospital	9	1%
Residential club	6	0%

N=1,810

2.5.1 Founder vs non founder members

Table 2.5c shows that EMDP founder members are most likely to work at Community Centres (74 per cent). However, non founders are much more likely to spread across a range of venues, with only a quarter at Community Centres (26 per cent).

Table 2.5c Main place of fitness work- founders vs non founders

	Founder	Non founder
Public leisure centre	8%	24%
Multi sports club / centre	0%	4%
Independent club	3%	5%
Chain of private fitness clubs	0%	14%
Hotel based club / chain	0%	1%
Workplace club	1%	2%
Residential club	0%	0%
Sports clubs (including NGB or CSP)	0%	2%
Community centre / village hall	74%	26%
Education and training (schools, colleges, universities)	3%	5%
Armed forces	0%	0%
Private home	2%	2%
Public open spaces	0%	0%
Head Office	0%	0%
Private gym or studio	3%	10%
Hospital	0%	1%
Other	8%	5%

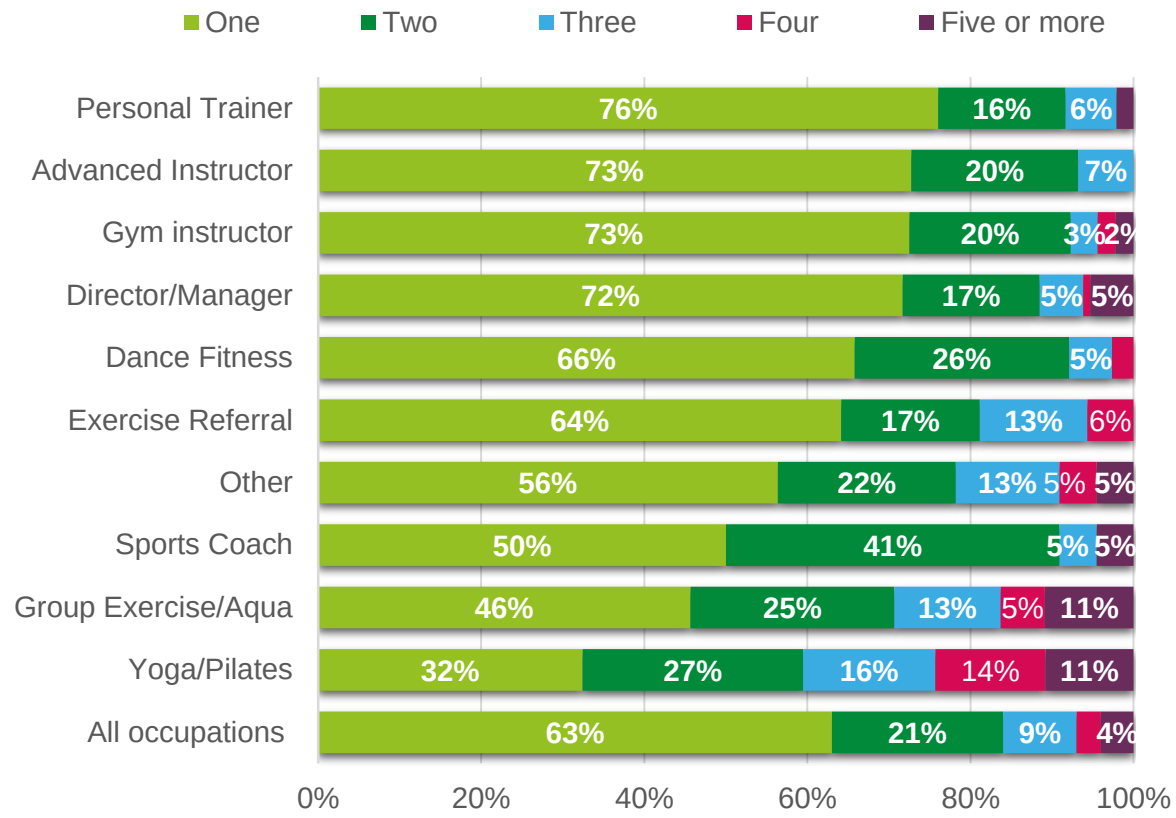
N=383

2.6 Number of organisations worked for

Those who are employed (as opposed to self-employed/freelance) were asked how many organisations they worked for. Figure 2.6a shows that about two thirds of all occupations (63 per cent) work for just one organisation. This ranges from three quarters of Personal Trainers to one third of Yoga/Pilates teachers.

Two thirds (66 per cent) of dance fitness professionals who work full-time or part-time in employment work for just one organisation, which is similar to the all occupations average of 63 per cent.

Figure 2.6a Number of organisations worked for



N=696

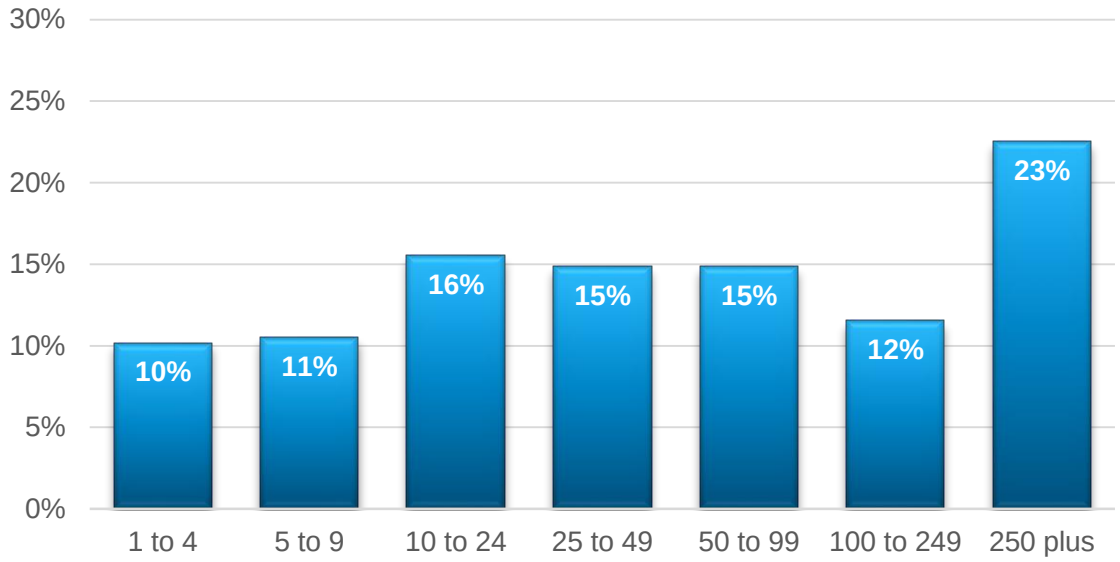
2.7 Size of main organisation worked at

Employed (not self-employed) respondents were also asked about the number of employees at the site of their main employment. This question received a range of responses, including 14 per cent who said they didn't know how many employees there were at their main place of work.

Excluding those who said they don't know, people are most likely to say they work for an organisation with over 250 employees, cited by nearly a quarter of all employed staff. However, dance fitness teachers are the least likely to say this – only 7 per cent work for employers with over 250 staff. Dance fitness teachers are most likely to work for organisation with between 10-24 staff (26 per cent).

Looking at other occupations, Yoga/Pilates teachers are most likely to say that they don't know what size of organisation they work for (49 per cent). Nearly a half (48 per cent) of Exercise Referral specialists work for organisations with over 100 people.

Figure 2.7a Size of main organisation worked at



N=599 (excluding 97 'don't know').

Of those who are employed, approximately a third work at a single site, a third work at a local authority leisure centre and a third work for a fitness chain.

3 Dance Fitness provision

Key points

- This survey represents Dance Fitness teachers teaching approximately 1,700 classes and 25,000 people every week. Each class has approximately 15 members.
- Nearly a half of Group Exercise teachers also teach Dance Fitness (45 per cent)
- A majority of respondents think Zumba is still the most popular dance style (58 per cent). Zumba is also quite likely to said to be still increasing in popularity as well as decreasing in popularity.
- Although opinion is fairly divided on the matter, Fit Steps is considered to be the Dance Style increasing most in popularity. This is unanimously attributed to the effect of Strictly Come Dancing.
- People are most likely to say that they don't want to teach any new Dance styles other than those that they already teach (32 per cent).
- When asked what factors would impact on the sustainability of their classes, people are most likely to say low income from classes.

3.1 Summary of dance fitness provision

Table 2.2a in section 2 showed that 202 respondents said their main role in the fitness industry was dance fitness. However, when asked about *all* of their roles in the fitness industry, a further 121 people said that they teach some dance fitness classes second to their main role.

Further, those who said they teach Group Exercise/Aqua were asked if any of their classes contained dance fitness elements. Those who responded with any of the first three responses in Table 3.1a were also asked some specific dance fitness questions.

Table 3.1a Group Exercise Dance Fitness activity

	Count	%
The group exercise classes that I teach are all dance fitness	13	2%
The group exercise classes that I teach are mainly dance fitness	27	5%
The group exercise classes that I teach are a combination of dance fitness and other exercise styles	100	18%
The group exercise classes that I teach contain a little dance fitness but mainly other exercise styles	111	20%
No, the group exercise classes that I teach do not contain any dance fitness	304	53%
I only teach aqua	14	2%

N=569

Table 3.1a shows that 140 Group Exercise/Aqua teachers also teach a substantial number of dance fitness classes. However, 80 of these had already said that they teach dance fitness. Therefore, a total of 60 Group Exercise/Aqua teachers who hadn't already said they teach dance fitness were added to the dance fitness sample, increasing it to 383.

Table 3.3b gives a summary of the dance fitness activities provided by this sample each week. It shows that Zumba is the most popular style taught, with 124 of the 383 teaching this style. Dance Aerobics and KFA Moves are the second and third most popular styles to be taught. Within this summary it needs to be considered that Medau Movement, Bagot Stack and KFA Moves are activities delivered by EMDP founder partners. The occurrence of these activities in comparison to the others is not representative of the whole dance fitness industry as the sample is skewed by a high response rate from EMDP founder partners.

Across all dance styles, the 383 providers teach:

- An average of 2 styles each
- A total of approximately 1,700 classes
- Approximately 25,000 people
- An average of 15 people in each class

Table 3.1b Summary of Dance Fitness provision (per week)

	Providers	Classes				People	
	Total number	Total number	Minimum number	Average number	Maximum number	Total number taught	Average number per class
Bagot stack	42	108	1	2	8	2,151	20
Ballet	28	115	1	2	30	848	7
Ballroom (all)	11	18	1	2	3	211	12
Belly Dance	7	16	1	1	7	179	12
Bhangra	3	4	1	0	2	31	16
BODYJAM®	10	14	1	1	3	230	16
Bokwa®	9	13	1	1	3	112	11
Bollywood	5	5	1	1	1	23	8
Booiaka	1	1	1	1	1	15	15
Breakdance	4	5	1	1	2	48	10
Capoeira	0	0	0	0	0	0	n/a
Ceroc	0	0	0	0	0	0	n/a
Cheerleading	6	6	1	1	1	57	14
Contemporary	14	21	1	1	5	224	11
Cultural Dances	6	10	1	1	5	158	16
Dance Aerobics	111	228	1	1	10	3,710	17
Disco	11	21	1	1	4	221	12
FitSteps®	30	65	1	2	6	830	14
Folk Dance	3	7	1	1	5	101	14
Hip Hop	11	20	1	1	5	234	12
Hoop Fitness	7	13	1	1	5	123	9
Jazz	16	46	1	2	10	415	9
Just Jhoom!	8	10	1	1	2	73	9
KFA Moves	73	170	1	2	7	2,487	15
Les Mills (other)	25	92	1	2	12	1,557	17
Latin	21	30	1	1	5	349	13
Line Dancing	11	30	1	2	6	516	17
Lishi	0	0	0	0	0	0	n/a
Medau Movement	7	29	1	3	8	478	16
Party/Club	8	12	1	1	3	131	13
Pole Fitness	7	15	1	2	5	131	9
Salsa	26	38	1	1	5	502	15
SH'BAM®	7	10	1	1	2	144	14
Street Dance	25	42	1	1	7	469	12
Tap Dance	17	61	1	2	10	485	8
Wheelchair Dance	6	12	1	2	4	177	16
Zumba®	124	436	1	3	20	7,689	18
TOTAL (per week)	**383**	**1,723**		**4**		**25,109**	**15**

3.2 Current most popular style

Respondents were asked what they thought was the most popular dance style at the moment. They were only allowed to select one style from the list as presented in Table 3.1b above. Table 3.2a shows the overwhelming support for Zumba amongst respondents (58 per cent). The remaining 42 per cent of responses were spread across all the other dance styles, with Les Mills the second most popular choice at 7 per cent.

Table 3.2a Top 10 most popular dance styles

	Count	%
Zumba®	223	58%
Les Mills (other)	26	7%
Other	17	4%
FitSteps®	16	4%
Dance Aerobics	13	3%
Pole Fitness	9	2%
Salsa	9	2%
SH'BAM®	8	2%
Ballroom (all)	7	2%
Street Dance	7	2%

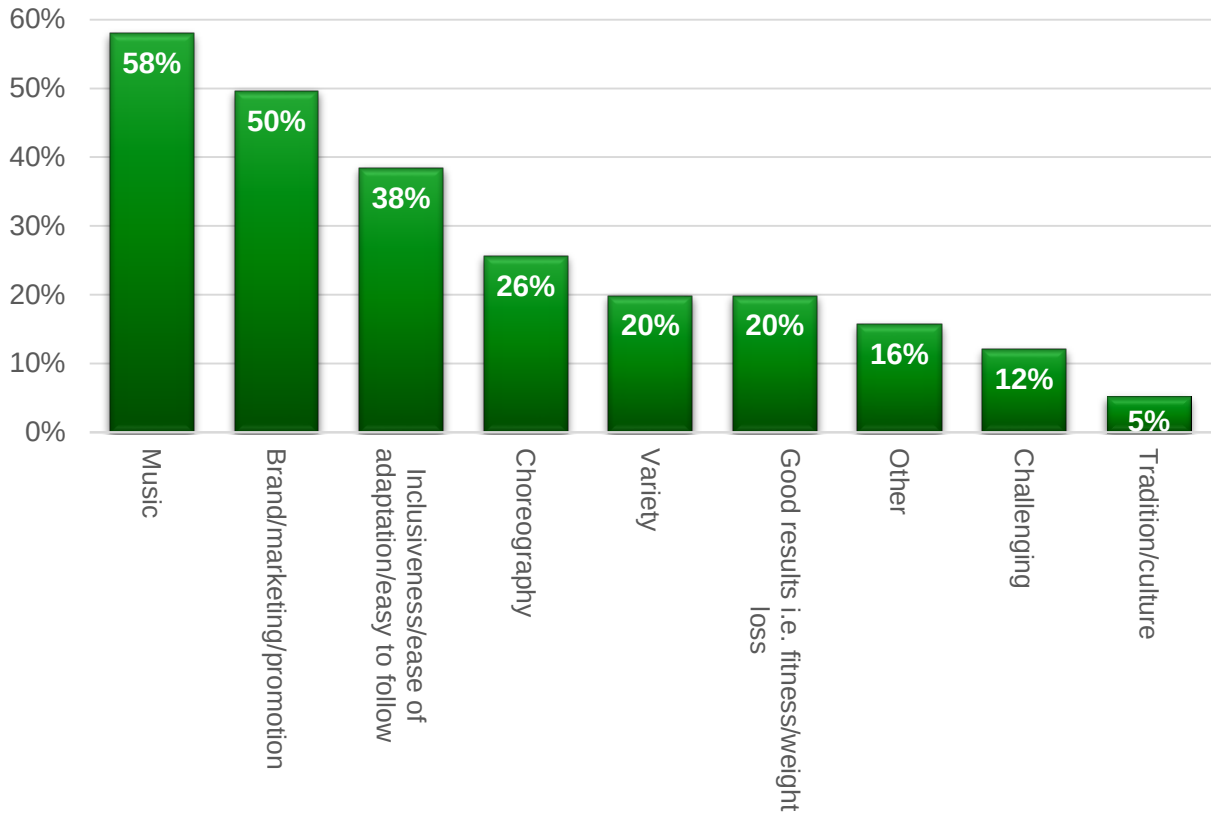
N=383

3.2.1 Reasons for popularity

Respondents were asked why they thought the dance style they had chosen above was the most popular. They were able to pick their top three reasons. Figure 3.2a shows that most people think their chosen style is the most popular because of the music. This is followed by half who chose branding and 38 per cent who chose accessibility/ease of access.

A number of people said something other to the options given in Figure 3.2a. Some people said that they thought the style they had chosen was popular because it is fun. This most often related to those who had chosen Zumba. Others said that popularity was linked to the media, and TV talent programmes such as Strictly Come Dancing. However, this was said about a range of dance styles, including Ballroom, Fitsteps®, Zumba®, Tap dance and Street dance.

Figure 3.2a Reasons for popularity



3.3 Increasing popularity

Having thought about which dance styles are currently the most popular, respondents were asked which dance style they thought was increasing the most in popularity. Table 3.3a shows that the responses to this question are much more diverse. Marginally, people think Fitsteps® is the dance style that is increasing the most in popularity, followed by Zumba (13 per cent) and Ballroom (12 per cent).

Table 3.3a Dance styles increasing in popularity (top ten styles)

	Count	%
FitSteps®	59	15%
Zumba®	51	13%
Ballroom (all)	45	12%
Ballet	20	5%
Les Mills (other)	20	5%
Street Dance	18	5%
Party/Club Fitness	15	4%
Pole Fitness	15	4%
Dance Aerobics	14	4%

When asked why they thought the dance style they had chosen was increasing in popularity, the answers varied widely. However, people are very likely to say that the popularity of Fitsteps® and Ballroom is down to the exposure they have in Strictly Come Dancing.

3.4 Decreasing popularity

Whilst respondents are most likely to say that Zumba is the most popular current style, and second most likely to say it is increasing in popularity, they are also most likely to say it is decreasing in popularity. Again, people are much more divided in their opinion about what style is decreasing in popularity compared to what is the most popular current dance style.

Table 3.4a shows that a fifth (21 per cent) think Zumba® is decreasing in popularity. This is over double the proportion of the next dance style chosen. People think the Zumba market is saturated and has peaked after a period of being very popular. Some say that class numbers are dropping.

After Zumba®, people are most likely to say that Folk Dance is decreasing in popularity (9 per cent) followed by Bokwa® and Line Dancing. Interestingly, 3 per cent think Fitsteps® is decreasing in popularity. There is no consensus as to why this is the case, other than two respondents who say it is repetitive and lacks variety.

Table 3.4a Dance styles decreasing in popularity (top 10 styles)

	Count	%
Zumba®	79	21%
Folk Dance	34	9%
Bokwa®	29	8%
Line Dancing	26	7%
Dance Aerobics	24	6%
Medau Movement	16	4%
Bagot Stack	12	3%
FitSteps®	11	3%
KFA Moves	9	2%

3.5 Future teaching plans

Respondents were asked which of the dance styles they might like to teach in the future that they don't currently teach. A third of respondents said that they don't plan to start teaching anything new (32 per cent). In line with what people think is generally the growing trend, 13 per cent say that FitSteps® is something they would like to start teaching in the future. Interestingly, only about a third of those saying they want to teach FitSteps® in the future identified it as the dance style increasing in popularity (35 per cent).

Table 3.5a Future teaching plans

	Count	%
None	124	32%
FitSteps®	49	13%
BODYJAM®	30	8%
Street Dance	29	8%
Les Mills (other)	28	7%
Salsa	26	7%
Hoop Fitness	25	7%
Party/Club Fitness	25	7%
Ballet	21	6%
Pole Fitness	21	6%

3.6 Future challenges

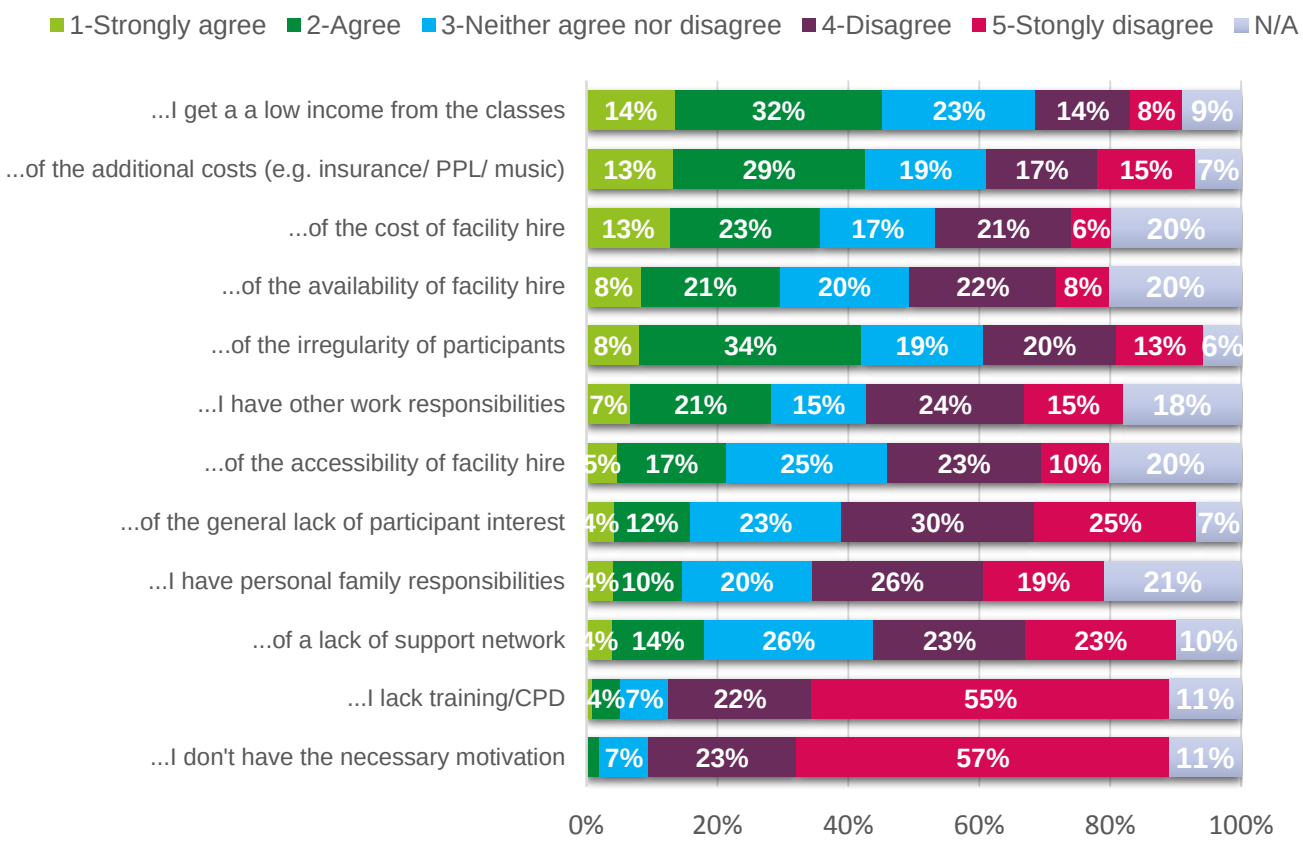
Finally, respondents were asked about the challenges facing them with regard to keeping their classes running. Each of the statements in the table below was proceeded by the following statement – 'I find it a challenge to maintain my classes and keep them running because…'.

Figure 3.6a shows that the main difficulties people face are financial. The answers which attract the strongest agreement are

- The low income gained from the classes (45 per cent agree or strongly agree)
- The additional costs, such as PPL and insurance (43 per cent agree or strongly agree)
- The cost of facility hire (36 per cent agree or strongly agree)

People are least likely to cite personal factors such as having the necessary motivation, skills or support network as a reason why they cannot keep their classes running.

Figure 3.6a Attitude statements



4 Hours and pay

Key points

- The average full-time salary is £22,700. This is up from £21,000 reported last year. The average full-time Dance Fitness salary is £13,800.
- The average part-time salary is £14,500, up from the £13,800 reported in 2012. This falls to £12,600 for Dance Fitness teachers.
- The average freelance salary is £20,800, which is very similar to the £20,600 reported the last time the survey was conducted. Again, the Dance Fitness figure is lower, at £15,300.
- Respondents work an average of 16 hours a week. This falls to 7 hours for Dance Fitness teachers, the fewest hours of any of the fitness occupations.

The data also shows that across all sectors:

- Women working full-time earn 97 per cent of a full-time male salary
- Female part-time workers earn 96 per cent of the average male part-time salary

Only 7 per cent of staff receive either commission or a bonus on top of their salary. This falls to 1 per cent of Dance Fitness teachers.

Only a fifth of respondents have had a pay rise in the last year (15 per cent of Dance Fitness teachers). This means that many may have seen their real terms pay decrease over this time period, given the positive rate of inflation.

Earnings and prices are subjects which have been high on the political agenda recently. Economic indicators show that retail price inflation has been consistently above average wage inflation in recent months, with the trend only just reversing to bring wage growth above inflation. This situation has been dubbed by some as a 'cost of living crisis', whilst others see it as a necessary part of the economic recovery.

One of the main purposes of conducting the Working in Fitness survey is to look at average pay and hours worked specifically in the fitness industry. This helps us to keep abreast of how the general state of the economy is affecting the sector generally. The results of this survey have been compared with those produced at a

national level by the Office for National Statistics in the Annual Survey of Hours and Earnings (ASHE).

Salary surveys are important for a number of reasons. One of the key benefits to those working in the industry is that it provides a benchmark against which they can compare themselves. Data on hours and earnings in this section is reported by other variables, such as employment status, employment type, occupation, region and age.

This chapter begins by looking at the average number of hours people work in the industry. After this, we look at salary levels, including the prevalence of bonuses and commission within the industry. Finally, we look at the incidence and levels of reported pay rises reported across different parts of the sector.

4.1 Hours

Respondents were asked how many hours they worked in a typical week. There were approximately 200 respondents who couldn't say how many hours per week they worked on average and were therefore asked to choose an option from a list of banded hours. These people have been allocated to the midpoint of that band.

Table 4.1a shows the average number of hours worked in the industry across occupation, employment status and employment sector. Where people chose an hour band, the midpoint has been taken as a proxy for total hours worked. For this question, we have excluded seasonal/casual workers, agency workers and volunteers. They are reported separately.

There are some key points from the table to be highlighted:

- Perhaps the most surprising statistic is the fairly low number of hours worked by the self-employed practitioners. They work a median average of 11 hours a week, which is less than the number of hours worked by those who work part-time (15 hours). It should be noted that the mean number of hours worked for the self-employed is 17 hours. This suggests that there are some people working very long hours and thus bringing this figure up.
- Those teaching Group Exercise and Dance Fitness are the most likely to work the fewest hours. Dance fitness teachers working full-time, part-time or who are self-employed work an average of 7 hours a week, the lowest number of any single occupation.
- Those working full-time are working an average of 40 hours a week, as do Directors/Managers.

Table 4.1a Average number of hours worked

	Median	Minimum	Maximum
OCCUPATION			
Director/Manager	40	5	80
Gym instructor	21	2	50
Advanced Instructor	16	1	50
Personal Trainer	20	1	60
Group Exercise/Aqua	10	1	70
Sports Coach	18	2	70
Dance Fitness	7	1	60
Yoga/Pilates	10	1	60
Exercise Referral	32	5	50
Other	26	1	60
EMPLOYMENT STATUS			
Full time	40	6	70
Part time	15	1	50
Self-employed / freelance	11	1	80
EMPLOYMENT SECTOR			
Public	30	1	60
Private	15	1	70
Charity, voluntary, community	20	1	80
Other	25	1	70
TOTAL	16	1	80

N=1,653

Average hours for those working in seasonal, contract or voluntary roles are shown in Table 4.1b.

Table 4.1b Average hours

	Median	Minimum	Maximum
Seasonal/ casual/ holiday worker	10	1	40
Contract / agency	16	2	42
An unpaid volunteer	10	1	50
Other	10	1	47

N=157

4.1.1 Comparisons to national data

The Office for National Statistics produces data on the average number of hours worked by those working across all sectors of the economy. It also produces

statistics specifically for fitness instructors. Their data support the findings of this survey. According to figures from the Annual Survey of Hours and Earnings 2014[3]:

- Full-time fitness instructors work a median average of 37.5 hours a week
- Part-time fitness instructors work a mean[4] average of 11.6 hours a week

4.2 Salaries

The Working in Fitness survey is a key source of information on salaries within the fitness industry. The Annual Survey of Hours and Earnings publishes data for fitness instructors, but for no other occupations. The following data is therefore a unique insight into the industry.

4.2.1 Mode of payment

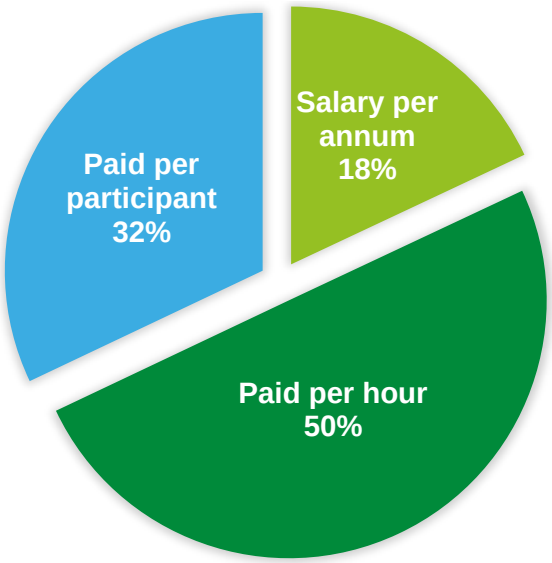
The Working in Fitness survey does not assume that everybody in the industry is paid in the same way. We therefore begin by asking respondents whether they are paid by a salary or by the hour/per participant. It is unsurprising, given the large proportion of self-employed practitioners in the industry that a significant number are paid per hour or per participant.

Figure 4.2a shows that just over two thirds are paid per hour or participant, leaving only just under a fifth (18 per cent) who are paid per annum. Dance fitness teachers are one of the least likely to be paid per annum (6 per cent). They are most likely to be paid per participant (57 per cent).

[3] See the *Annual Survey and Hours and Earnings, 2014*. ONS.

[4] The median part-time number of hours is not available

Figure 4.2a Mode of payment



4.2.2 Commission and Bonus

To make the final salary figures as accurate as possible, we asked respondents to tell us about any bonus or commission payments they receive. Figure 3.2b shows that the proportion receiving either a bonus or commission is relatively small (7 per cent). This represents little change on the 8 per cent recorded in 2012.

Figure 4.2b Commission or bonus

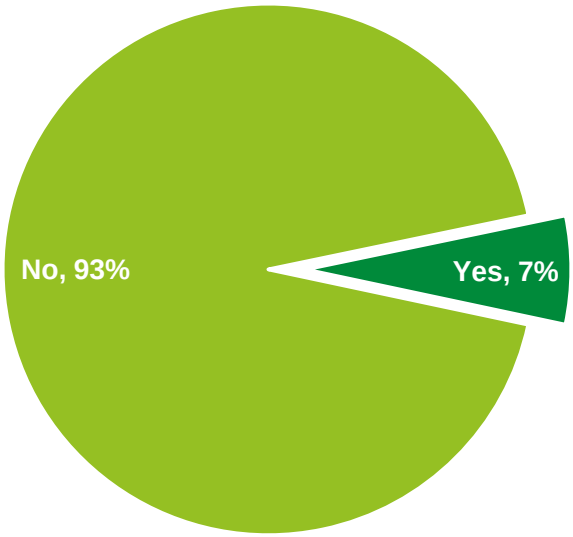


Table 4.2a shows which occupations are most likely to receive commission or a bonus. Unsurprisingly, directors/managers are most likely to receive both, as they

have been in previous years' surveys. Dance Fitness professionals are the least likely to receive either whilst no profession other than managers has more than 5 per cent of its total number or respondents in receipt of either commission or a bonus.

Table 4.2a Commission or bonus by occupation

	Commission	A bonus
Director/Manager	10%	16%
Other	5%	5%
Gym instructor	4%	4%
Advanced Instructor	5%	2%
Personal Trainer	4%	2%
Group Exercise/Aqua	2%	2%
Sports Coach	4%	4%
Dance Fitness	0%	1%
Yoga/Pilates	2%	2%
Exercise Referral	3%	3%

N=1,653

4.2.3 Total average salaries

In order to produce an average salary figure, calculations have to take place in order to convert banded salaries and hourly rates into a total salary figure[5]. Salary data presented in this section is for those working full-time, part-time and in a self-employed capacity.

Table 4.2b shows the total average salaries for full-time, part-time and self-employed roles across all occupations represented in the survey. This figure includes any bonus and commission payments received. The average full-time salary is slightly higher than the average self-employed salary.

Table 4.2b Average total salary

Mean average salary (£)		
Full-time	Part-time	Self-employed / freelance
£22,700	£14,500	£20,800

N=1,653

[5] Details about how these calculations were made can be found in Annexe 1.

There is little difference in salaries across the different genders. Table 4.2c shows that:

- Women working full-time in the sample earn 97 per cent of a full-time male's salary
- Female part-time workers earn 96 per cent of the male part-time salary
- Female freelancers earn only 83 per cent of the male equivalent. This has more to do with hours worked than salary received, however.

Table 4.2c Average total salary by gender

Mean average salary (£)					
Male			Female		
Full-time	Part-time	Self-employed / freelance	Full-time	Part-time	Self-employed / freelance
£23,070	£14,851	£23,670	£22,299	£14,301	£19,730

N=1,653

Looking at salary by occupation:

- the highest full-time salary is earned by directors/managers. However, they only earn approximately £1,000 more on average than a full-time Exercise Referral specialist.
- Exercise Referral specialists also earn the highest part-time salary, but this is only £500 above the part-time salary earned by a Yoga/Pilates teacher.
- Personal Trainers earn the highest freelance salary
- Dance fitness teachers earn a similar amount regardless of whether they are employed full-time, part-time or self-employed.

Table 4.2d Total salary by occupation

	Full time	Part time	Self-employed / freelance
Director/Manager	£25,200	£14,900	£22,000
Gym instructor	£15,100	£11,800	£12,600
Advanced Instructor	£16,600	£13,000	£18,700
Personal Trainer	£22,500	£15,900	£25,700
Group Exercise/Aqua	£19,700	£13,100	£16,000
Sports Coach	£17,200	£16,700	£18,200
Dance Fitness	£13,800	£12,600	£15,300
Yoga/Pilates	£20,000	£17,600	£21,600
Exercise Referral	£24,300	£18,100	£20,200
Other	£24,700	£15,800	£23,000

N=1,653

One other factor that can have a significant bearing on salary is the region in one is working. Unsurprisingly, London has the highest annual salary by approximately £3,000, whilst the East Midlands has the lowest salary by approximately £2,000.

Table 4.2e Salary by region

	Mean
London	£23,146
North East	£20,371
Yorkshire & Humberside	£20,299
West Midlands	£20,190
East of England	£20,188
North West	£19,610
South West	£19,585
Wales	£19,495
South East	£19,020
Northern Ireland	£18,913
Scotland	£18,400
East Midlands	£16,744

N=1,653

4.2.4 Pay rises

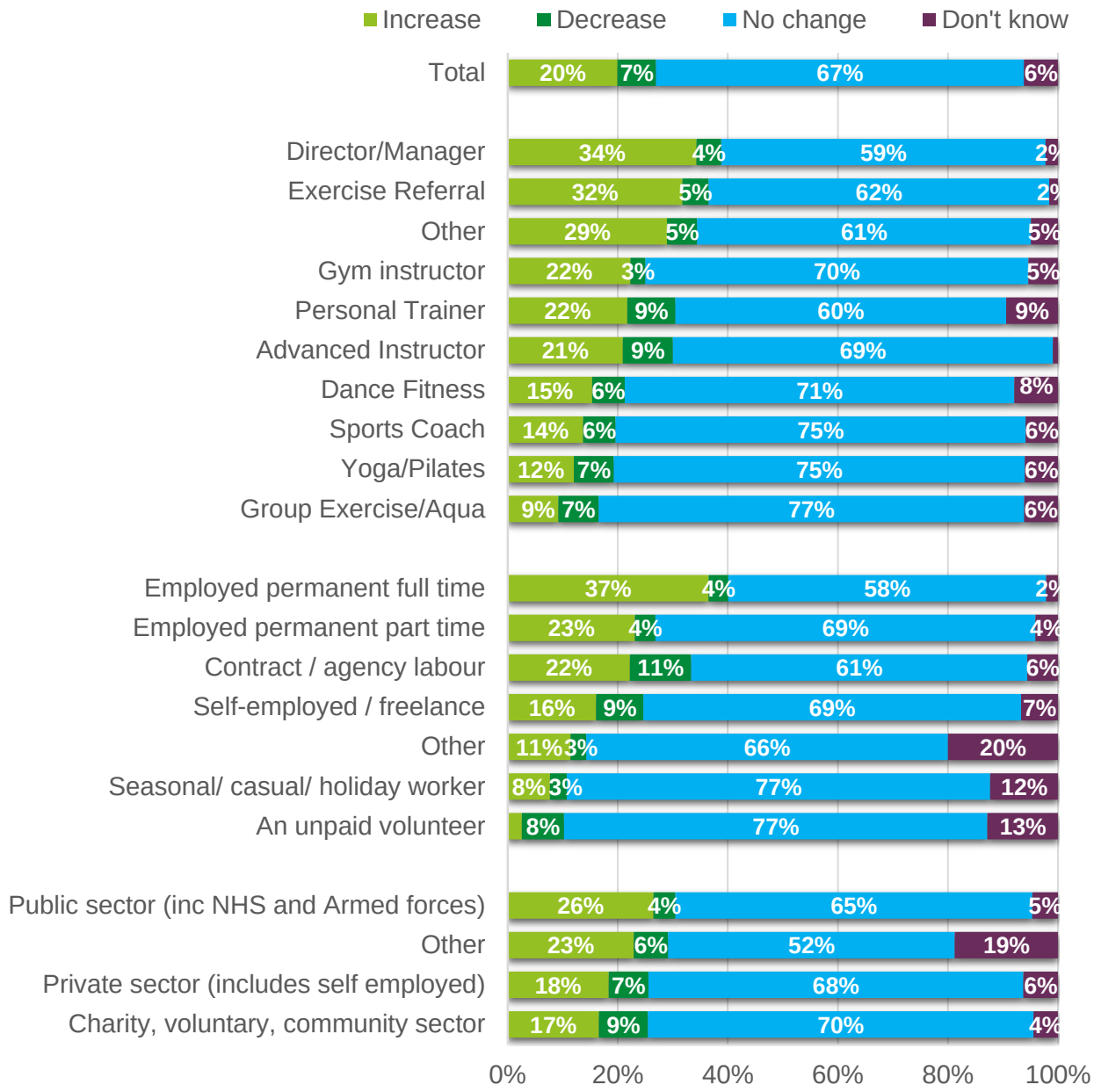
The Working in Fitness survey tracks year-on-year the proportion of the industry who say they have received a pay increase. This year, Figure 4.2c shows that a fifth of

the workforce have. This is comparable to 2012 when the same proportion had seen their salary rise, and slightly less than 2011 when a quarter had seen their salaries rise. Dance fitness teachers are less likely to have received a rise (15 per cent).

Overall, it's likely that many salaries in the industry are actually decreasing in real terms, given that two thirds have not had any increase in the last year whilst the average rate of inflation has been positive.

Figure 4.2c also shows that directors and managers are most likely to have received a pay increase whilst Group Exercise/Aqua teachers are the least likely.

Figure 4.2c Increase or decrease in pay



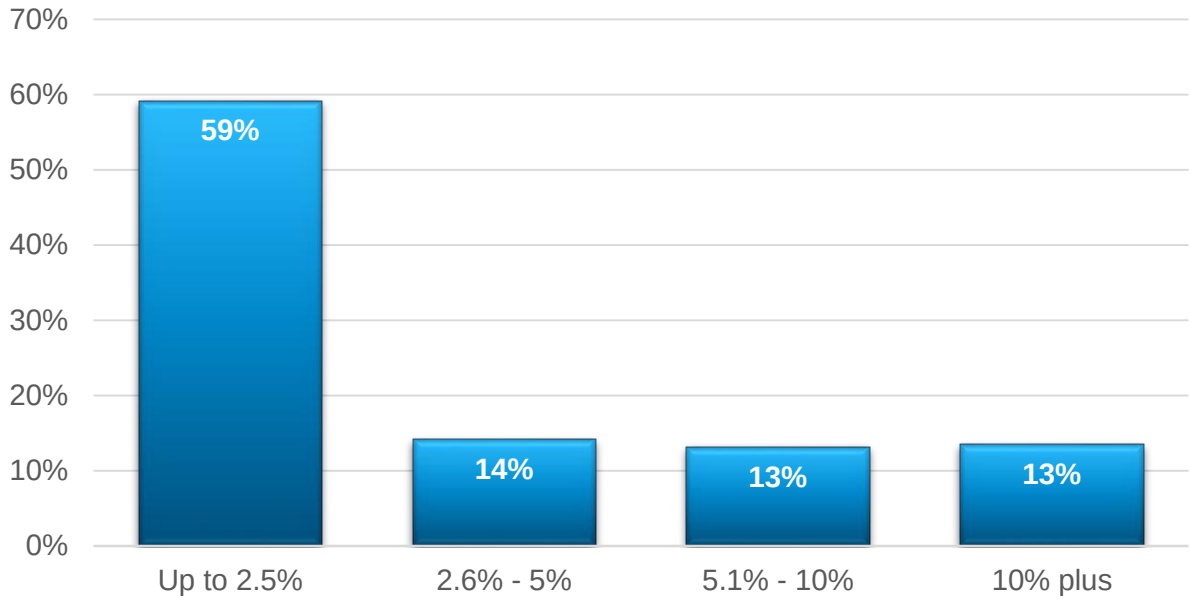
N=1,810

Those who had received an increase were asked what percentage increase they had received. A fifth said they didn't know. These respondents are most likely to be self-employed who find it more difficult to estimate income (57 per cent).

Of those that *could* estimate their salary increase, nearly 60 per cent said reported that it was below 2.5 per cent of their basic income. Only a quarter (26 per cent) had received an increase above 5 per cent of salary. Of the 23 dance fitness teachers

who had received a rise and could estimate how much it was, 10 said it was below 2.5 per cent.

Figure 4.2d Percentage increase in pay



5 Qualifications and training

Key points

- Eleven per cent of respondents haven't undertaken any training in the last year. This is true for only 8 per cent of those in Dance Fitness.
- Managers are the most likely of all the occupational groups not to have undertaken any training (15 per cent) and a quarter of them say they haven't had sufficient training to do their job.
- Most respondents fund at least a part of their own training (84 per cent). This rises to 95 per cent of Dance Fitness teachers.
- Most people feel that they have had sufficient training to do their job (83 per cent). This is true for 90 per cent of Dance Fitness professionals.

With regard to training plans:

- A fifth of respondents (19 per cent) say that they do not plan to train in the coming year. This is corroborated by the 21 per cent who say that they don't plan to undertake any Continuous Professional Development in the coming year. This figure is 26 per cent for Dance Fitness teachers.
- Of those that do plan to train, about half (54 per cent) plan to undertake training to work with existing types of client (51 per cent for Dance Fitness teachers) whilst about a third (32 per cent) say they will train to work with new types of client.
- Across all occupations, the biggest training gaps seem to be with specialist populations, such as those with cancer, neurological illnesses, strokes and mental health issues.

Looking at training level:

- people are most likely to say they plan to train at Level 3 (58 per cent), whilst
- a quarter (25 per cent) plan to train at Level 2. The most popular training plan at Level 2 is Dance Fitness (27 per cent).
- About a third plan to train at Level 4 (34 per cent)
- Dance Fitness teachers are most likely to say they will train at Level 3 (62 per cent).

Cost is the most significant barrier to training (62 per cent).

The United Kingdom has long had a productivity challenge. This has been articulated recently by the Bank of England who argue that since 2007-8 productivity in the UK has been 'particularly weak'[6]. Whatever the cause of the so called 'economic puzzle', we know that the utilisation of skills and knowledge is an essential part of long-term economic productivity and growth.

The Working in Fitness Survey asks a range of questions about levels of qualification, skills and training. Asking these questions and thus understanding potential future training plans can help the industry ensure suitable provision is available for those who need it.

This section begins with a summary of qualifications already attained. We then go on to look at:

- training that has been undertaken in the last year
- training that is likely to take place in the coming year
- attitudes to training

We begin by looking at qualifications in the sector.

5.1 Qualifications

We begin this section by looking at the qualification levels of the fitness workforce. We will look at respondents' highest level of education before looking specifically at qualifications gained that are relevant to the fitness industry.

5.1.1 Highest level of education

Table 5.1a shows that, overall, fitness professionals responding to this survey have a high level of education. Over a half (52 per cent) are qualified to Level 4 or above (HNC upwards). This compares to the national economy where only 27 per cent are qualified to this level[7]. Further, only 1 per cent have no qualifications compared to over a fifth in the wider economy (22 per cent). These findings are very similar to 2012, when 25 per cent said their highest level of education was an Honours degree (compared to 22 per cent this year) and 16 per cent said a Masters degree (compared to 15 per cent).

With regard to occupation:

[6] http://www.bankofengland.co.uk/publications/Documents/quarterlybulletin/2014/qb14q201.pdf

[7] See the Census, 2011.

- Gym instructors are least likely to have either a degree or masters qualification (21 per cent) whilst Yoga/Pilates teachers are the most likely (51 per cent)
- Managers are the least likely to hold a Masters degree (8 per cent).
- Over a third of dance fitness teachers hold a qualification at honours degree or higher (35 per cent).

Table 5.1a Highest level of education

	Count	%
Doctorate (PHD)	19	1%
Masters degree/ post grad diploma	274	15%
Honours degree	401	22%
Foundation degree	74	4%
Cert Ed	70	4%
HNC/HND	107	6%
ONC/OND	13	1%
BTEC / SCOTVEC	76	4%
A-level or equivalent	201	11%
Level 1 NVQ / SVQ	2	0%
Level 2 NVQ / SVQ	59	3%
Level 3 NVQ / SVQ	249	14%
Level 4 NVQ / SVQ	78	4%
GCSE or equivalent	97	5%
None	24	1%
Other	66	4%

N=1,810

Whilst it is interesting to know about a respondent's highest level of education, it is equally interesting to understand which of these qualifications are relevant to the fitness industry.

Those who gave one of the top four options in Table 5.1a were asked if their degree or doctorate was sport/fitness related. Over a third, 35 per cent, of these 269 people said it was. This is lower for dance fitness teachers (21 per cent).

However, in Table 5.1b below, only 136 say that they have a HND/Degree in fitness. It is therefore probable that respondents are now answering specifically about practical fitness qualifications, as opposed to academic courses.

Table 5.1b shows only 8 per cent now holding a qualification above level 4 in fitness. Nearly two thirds of respondents (63 per cent) hold their highest fitness qualification at Level 3. Only a very small number do not hold a fitness qualification (1 per cent).

Table 5.1b Highest level of fitness qualification

	Count	%
HND / Degree in fitness	136	8%
Level 3 NVQ / SVQ (work based assessment)	284	16%
Level 3 VRQ	129	7%
Other Level 3 fitness qualification	708	40%
Level 2 NVQ / SVQ (work based assessment)	72	4%
Other Level 2 fitness qualification	247	14%
Qualifications gained outside the UK	39	2%
A fitness apprenticeship	6	0%
I teach fitness/dance and don't have a fitness qualification	16	1%
Other	149	8%

N=1,786

5.1.2 Dance fitness awarding body

Dance fitness professionals were asked which awarding body awarded their qualification. People are most likely to say Zumba (30 per cent) or REPs (24 per cent). Nearly a fifth (17 per cent) say that they do not have an EMD qualification. The 'other' responses include the YMCA and CYQ.

Of the 25 that do not hold an EMD qualification, about half (12) would be interested in training/qualifications that supported them in teaching dance fitness classes.

Table 5.1c Awarding body of EMD qualification

	Count	%
Zumba®	44	30%
Register of Exercise Professionals CPD (e.g. FitSteps®, Bokwa)	36	24%
Royal Academy of Dance (RAD)	5	3%
Imperial Society of Teachers of Dance (ISTD)	4	3%
British Ballet Organisation (BBO)	3	2%
International Dance Teachers Association (IDTA)	2	1%
United Kingdom Cheerleading Association (UKCA)	0	0%
British Cheerleading Association (BCA)	0	0%
United Dance Organisation (UDO)	0	0%
National Dance Teachers Association (NDTA)	0	0%
I do not hold an EMD qualification	25	17%
Other	29	20%

N=148

5.2 Training

Training and Continuous Professional Development is important to any industry, and the fitness industry is no exception. Total spend on training by employers in 2013 was £42.9bn across all sectors of the UK economy, such is the importance of having well trained staff who are up-to-date with the latest developments in the industry. This equates to £2,550 per person trained and £1,590 per employee[8].

5.2.1 Number of training days

Figure 5.2a shows the banded number of training days undertaken by respondents in the last year. A third of the sample have spent between 1 and 3 days training (33 per cent), whilst a tenth haven't undertaken any (11 per cent). A quarter (25 per cent) have undertaken between 4 and 6 days training whilst almost a fifth (18 per cent) have attended over 11 days of training in the last year.

[8] See the *UK Commission's Employer Skills Survey 2013: UK Results.* Evidence Report 81, January 2014.

Figure 5.2a Number of training days in the last year

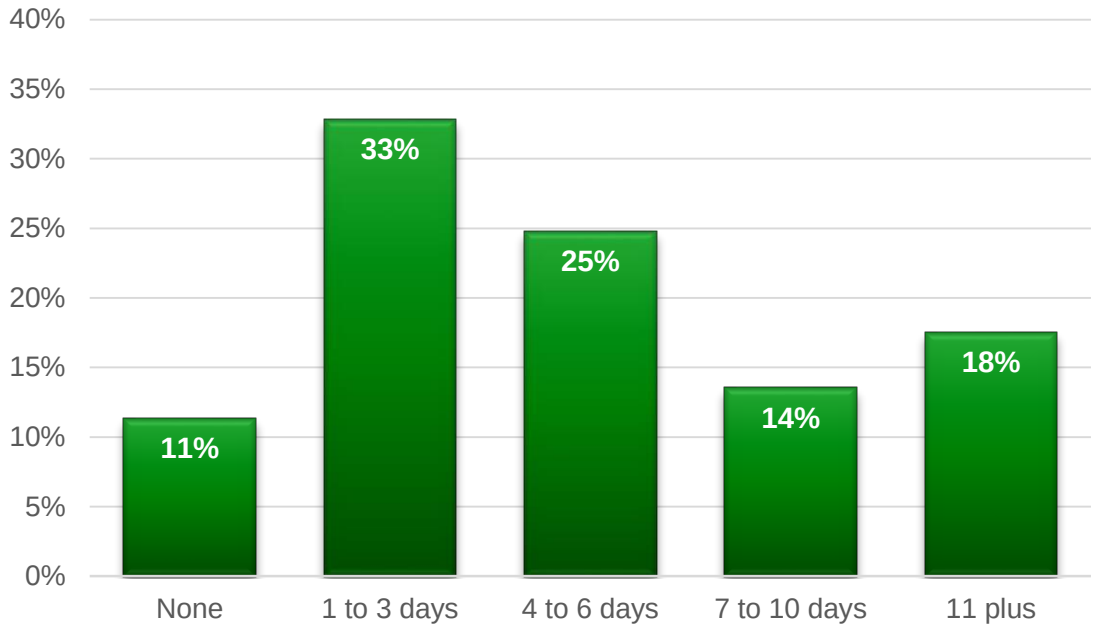
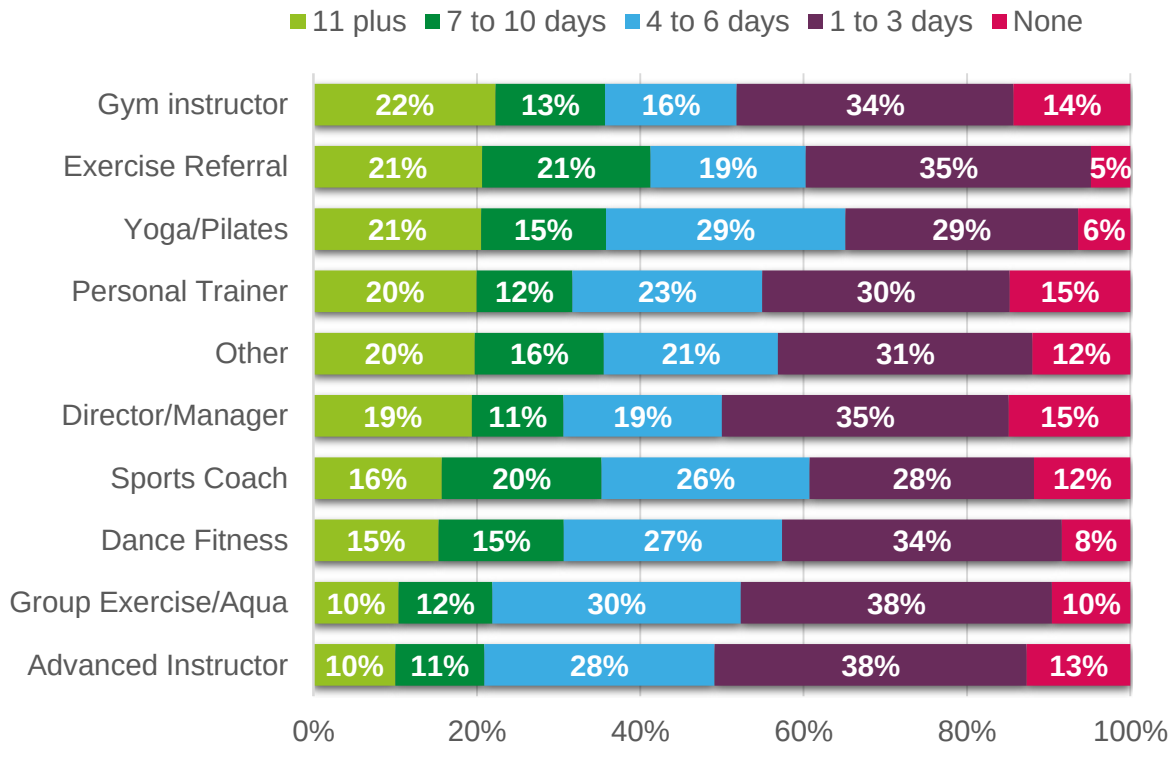


Figure 5.2b shows that Managers/Directors along with Personal Trainers are the most likely to have attended no training days in the last year. Exercise Referral specialists are most likely to have completed over 6 days of training.

Figure 4.2b Training days by occupation



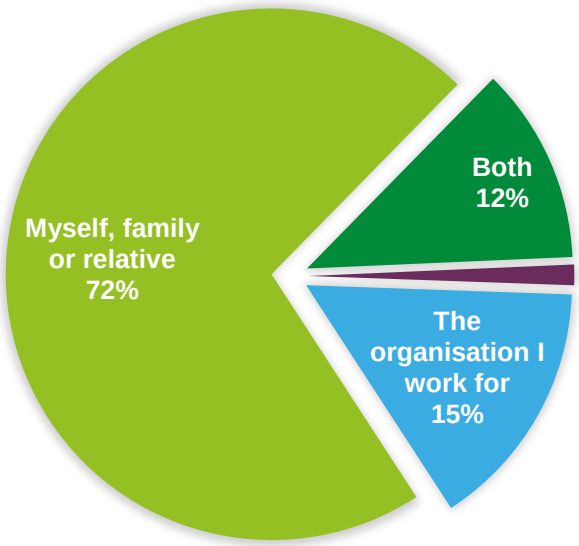
5.2.2 Funding of training

We noted earlier that the average training spend per person of those who did any training across the whole economy was £2,550. It is therefore informative to look at who it is who pays for this training.

With a high incidence of self employment in the industry, we would expect to observe a high level of self-funded training. This is excatly what we see in Figure 5.2c. A large majority (72%) fund their training entirely by themselves, whilst 84 per cent pay at least a part of their training costs. This rises to 85 per cent and 95 per cent respectively for dance fitness teachers.

The proportion who self-fund at least a part of their training rises to 95 per cent for those who are self-employed, and thus is also higher for the occupations where self-employment is more prevalent.

Figure 5.2c Who paid for training



5.2.3 Sufficiency of training

In order to gauge whether or not fitness professionals had received enough training, we asked them about their own perception of whether or not they had. Overall:

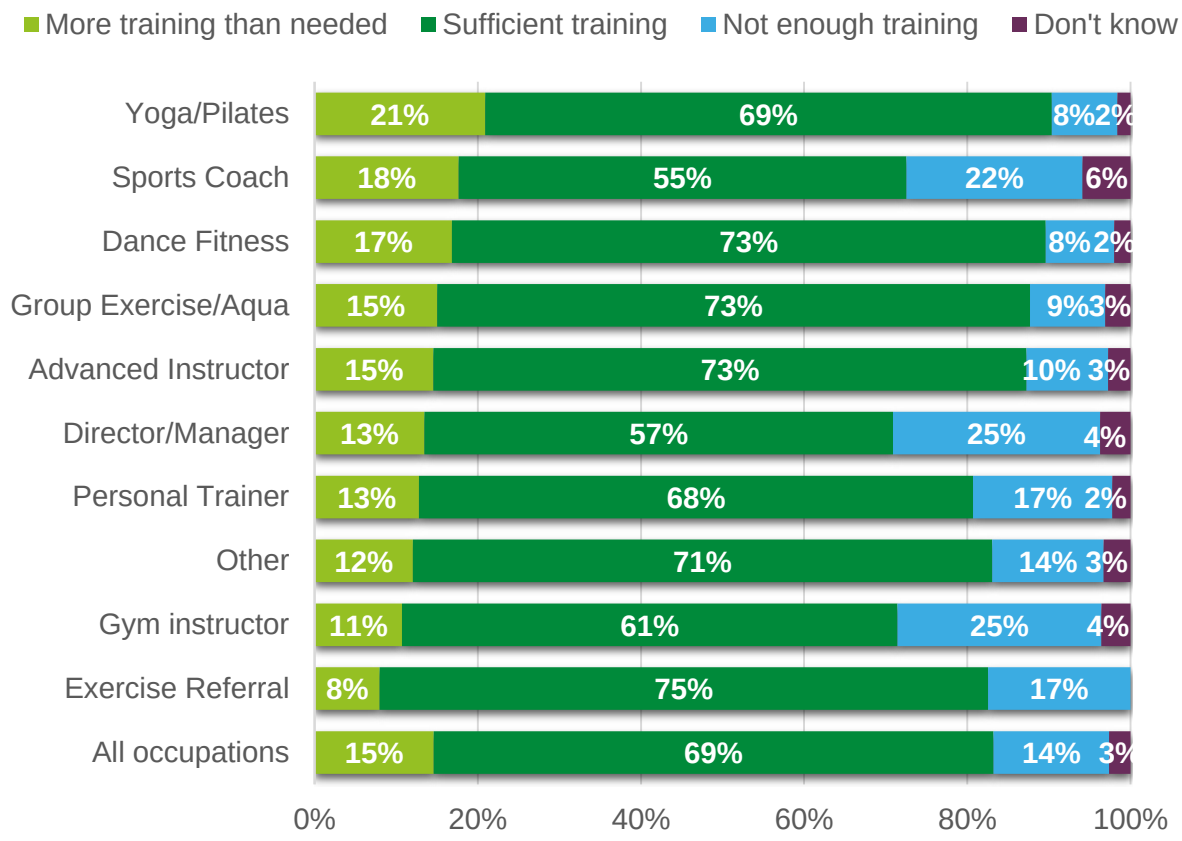
- More than 8 in 10 (83 per cent) said that they felt they had undertaken at least sufficient if not more training that is necessary to do their job. This rises to 90 per cent of dance fitness teachers.
- 15 per cent felt that they had more training than needed

Figure 5.2d shows how different occupational groups answer this question. It highlights some interesting points:

- A quarter of directors/managers say they haven't received enough training, which is unsurprising given that this occupational group was one of the least likely to have done any training.
- Interestingly, Exercise Referral practitioners were the least likely not to have trained, and yet here are the least likely to say they have had more training than necessary.
- Yoga and Pilates teachers are the most likely to say that they have had more training than needed, which is interesting given that most of the people in this occupation are self-employed and thus self-fund their training. It is possible that these practitioners are required to undertake some training that they believe is over and above what is necessary for their job role.

Nearly a quarter of those working in permanent full-time employment roles (23 percent) say that they haven't received enough training, compared to only 11 per cent of self-employed/freelancers.

Figure 5.2d Sufficiency of training



5.2.4 Training for different types of client

Before respondents were asked about their training needs for working with different types of client, they were first asked which particular clients they worked with. Figure 5.2e shows that about two thirds of respondents are working with older people (64 per cent) but less than half of respondents work with any of the other groups. Nearly a fifth of the sample (18 per cent) said that they didn't work with any of these groups of people.

Figure 5.2e Different types of client

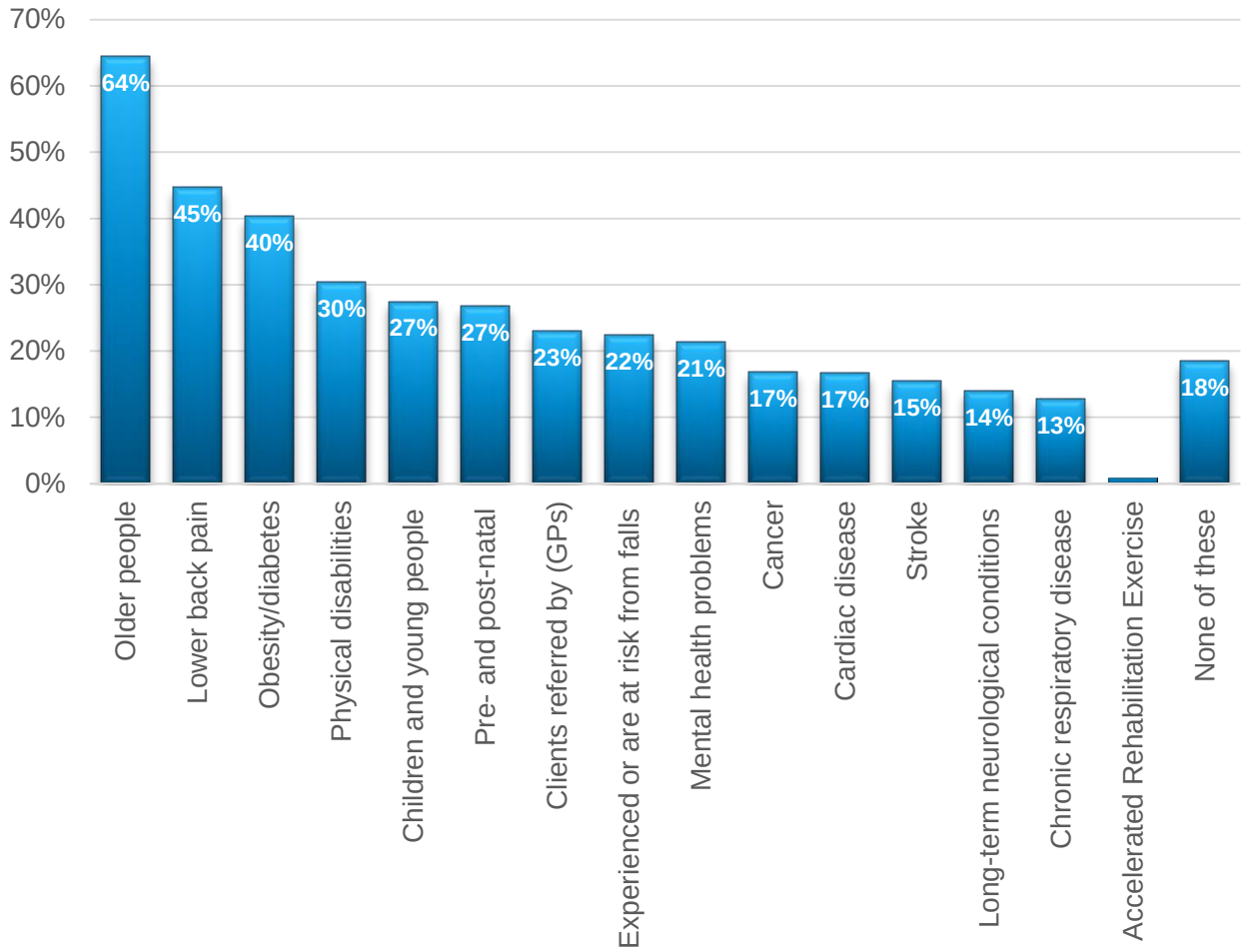


Table 5.2a shows what type of clients the different occupational groups work with the most. The percentages relate to the total proportion of professionals in any given occupation who are working with that type of client. Some occupations have nearly all their professionals working with a certain type of client. Key findings from the table include:

- After Exercise Referral specialists, dance fitness, yoga/Pilates and Advanced Instructors are most likely to work with older people
- 95 per cent of Exercise Referral specialists work with people who have obesity/diabetes
- Exercise Referral specialists are also more likely to have dealt with clients who have physical disabilities and people who have mental health issues
- After Exercise Referral specialists, Yoga and Pilates teachers are the most likely to be dealing with people with cancer (29 per cent).

Table 5.2a Client type by occupation

	D/M	GI	AI	PT	GE	SC	DF	YP	ER
Children and young people	39%	37%	26%	27%	14%	82%	23%	22%	25%
Older people	63%	63%	75%	62%	49%	39%	75%	79%	90%
Clients referred by General Practitioners (GPs)	32%	21%	37%	14%	10%	14%	10%	35%	92%
Clients with physical disabilities	38%	30%	39%	25%	12%	27%	26%	38%	79%
Pre- and post-natal clients	25%	21%	28%	30%	25%	6%	7%	49%	40%
People with mental health problems	28%	16%	30%	16%	10%	25%	14%	24%	81%
People who have experienced or are at risk from falls	17%	17%	31%	18%	11%	10%	23%	30%	76%
People after having a stroke	18%	13%	28%	8%	5%	2%	17%	20%	65%
People with cardiac disease	19%	11%	30%	12%	8%	6%	12%	17%	81%
People with lower back pain	44%	41%	50%	45%	29%	10%	28%	77%	86%
People with cancer	18%	12%	25%	6%	11%	8%	16%	29%	70%
Accelerated Rehabilitation Exercise (military only)	1%	0%	0%	1%	0%	0%	0%	1%	5%
People with obesity /diabetes	46%	54%	41%	50%	25%	29%	26%	32%	95%
People with chronic respiratory disease	14%	9%	23%	7%	6%	6%	8%	14%	73%
People with long-term neurological conditions	16%	9%	20%	7%	7%	8%	10%	22%	67%
None of these	17%	20%	14%	17%	37%	10%	16%	7%	0%

N=1,810. D/M=Director/Manager, GI=Gym Instructor, AI=Advanced Instructor, PT=Personal Trainer, GE=Group Exercise/Aqua, SC=Sports Coach, DF=Dance Fitness, Y/P=Yoga/Pilates and ER=Exercise Referral.

Table 5.2b shows the differences between EMDP founder and non-founder members. It shows that founder members are more likely to say they will work with older people (87 per cent compared to 63 per cent). Non-founders are more likely to work with children and those with long term neurological conditions.

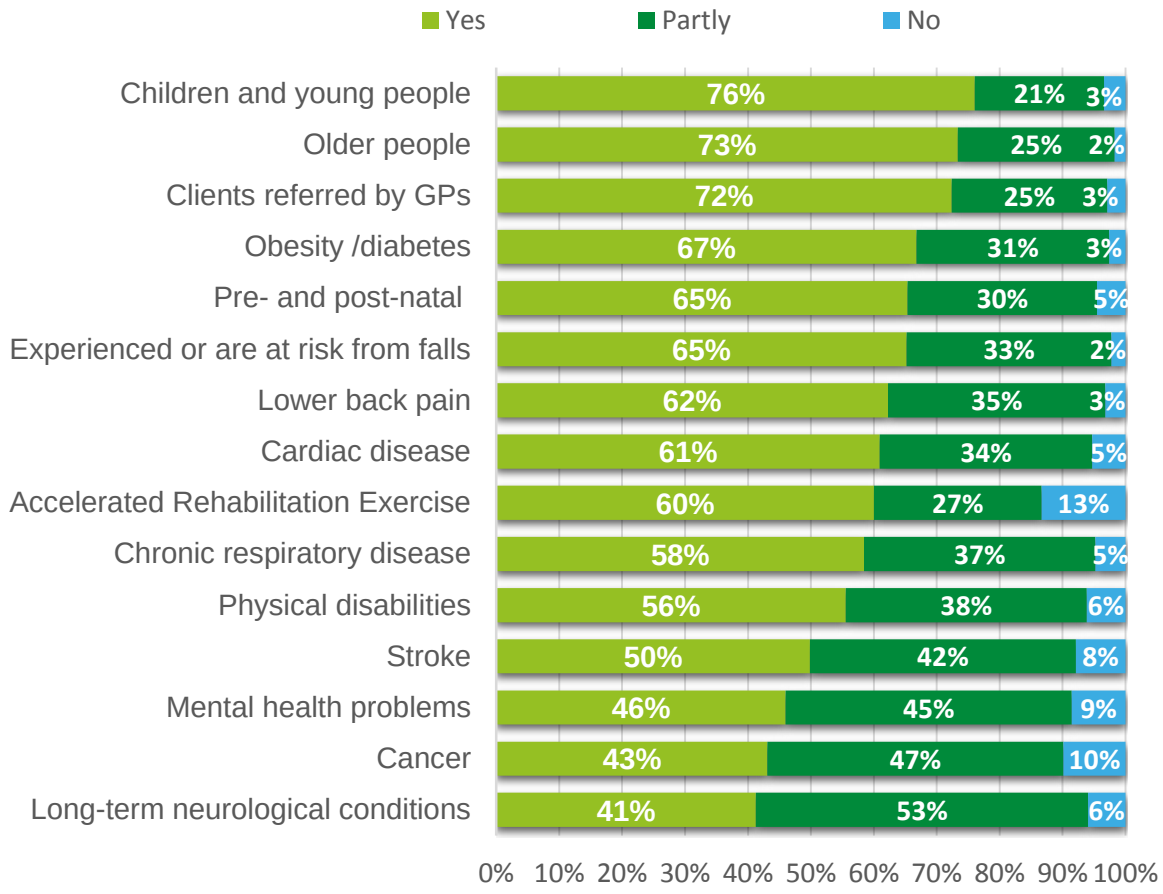
Table 5.2b Founders vs non founders

	Founder	Non-founder
Children and young people	10%	37%
Older people	87%	63%
Clients referred by General Practitioners (GPs)	10%	10%
Clients with physical disabilities	5%	10%
Pre- and post-natal clients	11%	18%
People with mental health problems	29%	16%
People who have experienced or are at risk from falls	24%	9%
People after having a stroke	17%	7%
People with cardiac disease	34%	21%
People with lower back pain	22%	9%
People with cancer	0%	0%
Accelerated Rehabilitation Exercise (military only)	26%	27%
People with obesity /diabetes	9%	6%
People with chronic respiratory disease	11%	9%
People with long-term neurological conditions	8%	25%
None of these	10%	37%

It is important that those working with specialist populations have the correct level of training to work with them. Figure 5.2f shows what proportion of those working with specific clients feel they have had sufficient training to work with those clients. Particularly, it shows that:

- Those working with children and young people are most likely to say that they have received the right level of training
- Only approximately 4 in 10 of those who work with clients suffering from cancer and long-term neurological conditions feel they have had the right level of training to do so.
- The proportions who say they haven't received enough training are small – people are most likely to say they have received a part of the training they need to work with these particular clients.

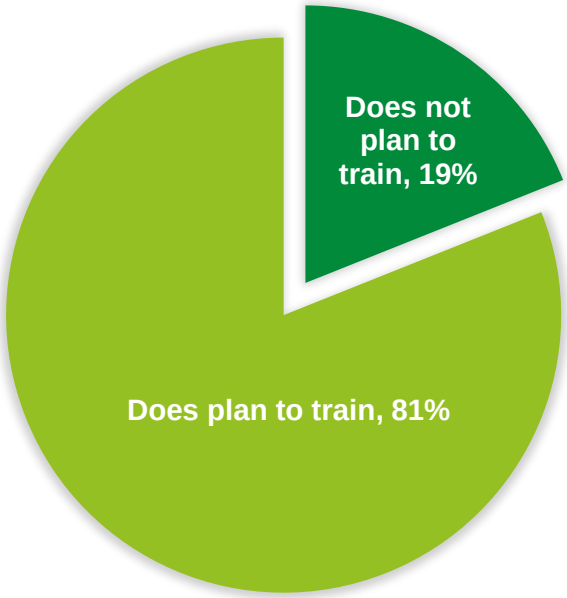
Figure 5.2f Whether had right level of training for particular clients



5.2.5 Future training plans

Overall, a fifth of respondents say that they do not plan to do any additional training or CPD to work with these clients or any new types of client. This increases to a quarter of dance fitness teachers

Figure 5.2g Whether or not has any training plans



Respondents are most likely to say that they will undertake training to work better with their existing clients (54 per cent). About one third (32 per cent) say they are planning to undertake training to work with new types of client whilst a similar proportion (33 per cent) say that they're planning other general fitness training. Only 1 in 10 (9 per cent) are planning any other type of training.

Table 5.2c Types of training planned

		%
Yes	More training to work with existing types of clients	54%
	Training to work with new types of clients for the first time	32%
	Other general fitness / exercise training e.g. Pilates	33%
	Other general training like communications etc.	9%
No	I have no training plans	19%

Looking at this by occupation, Table 5.2d shows that:

- Group Exercise/Aqua instructors are the most likely to say that they have no training plans, just as they were the one of the least likely occupational groups to have undertaken training in the last year.
- Personal Trainers are most likely to say they will undertake training to work with new types of clients (46 per cent)
- Exercise Referral specialists are most likely to undertake training to work with existing clients (70 per cent)

Table 5.2d Potential training by occupation

	More training to work with existing types of clients	Training to work with new types of clients for the first time	Other general fitness / exercise training e.g. Pilates	Other general training like communications etc.	No - I have no training plans
Exercise Referral	70%	29%	16%	8%	6%
Yoga/Pilates	66%	33%	24%	6%	12%
Sports Coach	61%	27%	29%	18%	20%
Personal Trainer	57%	46%	41%	13%	12%
Advanced Instructor	56%	24%	32%	9%	17%
Other	54%	36%	27%	10%	22%
Director/Manager	52%	34%	29%	10%	20%
Dance Fitness	51%	14%	32%	7%	26%
Gym instructor	50%	38%	42%	11%	20%
Group Exercise/Aqua	35%	23%	35%	3%	33%

In order to look at training plans more specifically, we asked respondents what training they are planning at Level 2, Level 3 and Level 4 specifically. We also asked them what CPD they planned to undertake in the next 12 months.

Table 5.2e summarises these responses by categorising all those who say they plan to undertake any training at any level together. We can then see the proportions who plan to train at every level before looking at what they plan to train in. Table 5.2e shows that:

- people are most likely to say they plan to train at Level 3 (58 per cent).
- About a quarter (25 per cent) plan to train at Level 2
- About a third plan to train at Level 4 (34 per cent)
- A fifth (21 per cent) say that they don't plan to undertake any CPD, which echoes the 19 per cent above who said that they don't plan to undertake any training.

Table 5.2e Summary of training plans by level

	Yes		No	
	Count	%	Count	%
Whether planning to train at Level 2	455	25%	1355	75%
Whether planning to train at Level 3	1052	58%	758	42%
Whether planning to train at Level 4	614	34%	1196	66%
Whether planning to complete CPD	1428	79%	382	21%

Table 5.2f shows the same data by occupation. It shows that dance fitness teachers are most likely to say they plan to train at Level 3 (62 per cent) and are least likely to train at Level 4 (14 per cent).

Table 5.2f Summary of training plans by occupation

	Planning to train							
	Level 2		Level 3		Level 4		CPD	
	%	Count	%	Count	%	Count	%	Count
Director/Manager	19%	25	55%	74	38%	51	79%	106
Other	23%	43	50%	92	38%	69	77%	140
Gym instructor	44%	49	73%	82	33%	37	79%	89
Advanced Instructor	21%	23	55%	61	34%	37	78%	86
Personal Trainer	22%	96	63%	283	44%	197	76%	339
Group Exercise/Aqua	32%	83	48%	124	15%	39	75%	194
Sports Coach	41%	21	55%	28	35%	18	80%	41
Dance Fitness	34%	69	62%	126	14%	28	88%	177
Yoga/Pilates	16%	41	66%	164	37%	91	86%	213
Exercise Referral	8%	5	29%	18	75%	47	68%	43

5.2.6 Training plans at Level 2

Respondents were asked what specific training they had planned at Level 2. Of all those who plan to train at Level 2, people are most likely to say they will train in Exercise, Movement and Dance (27 per cent). Only about a third (31 per cent) of these 124 people are Dance Fitness teachers in their main role. Personal Trainers (16 per cent) and Gym instructors (12 per cent) also indicate their intention to train in EMD.

Table 5.2g Training planned at Level 2

	Yes		No	
	Count	%	Count	%
ETM	72	16%	383	84%
Gym	79	17%	376	83%
Aqua	59	13%	396	87%
Exercise, Movement and Dance	124	27%	331	73%
Children	79	17%	376	83%
Other Level 2 training	134	29%	321	71%

N=455

5.2.7 Training plans at Level 3

As shown above, Level 3 is the most popular level at which people say they plan to undertake training. Table 5.2h shows what specific training professionals plan to do at Level 3. It shows:

- that the training most likely to be planned is Exercise Referral (30 per cent). The people most likely to say they want to train in Exercise Referral at this level are Gym Instructors (28 per cent of all Gym Instructors planning to train at Level 3) and Personal Trainers (27 per cent of those in this occupation planning to train at this level).
- There are no Exercise Referral specialists needing to train at Level 2

Table 5.2h Training planned at Level 3

	Yes		No	
	Count	%	Count	%
Personal Training	189	18%	863	82%
Exercise Referral	320	30%	732	70%
Pre-post natal	203	19%	849	81%
Disability	121	12%	931	88%
Older adults	199	19%	853	81%
Yoga	119	11%	933	89%
Pilates	166	16%	886	84%
Exercise, Movement and Dance	148	14%	904	86%
Other level 3 training	166	16%	886	84%

N=1052

5.2.8 Training plans at Level 4

At level 4, practitioners are most likely to say they will train in dealing with obesity/diabetes (42 per cent of those planning to train and level 4). This is unsurprising, given the rising trend in the levels of these two subjects. After this approximately a quarter of those planning to train at Level 4 say they will train in cardiac rehab (23 per cent).

Table 5.2i Training plans at Level 4

	Yes		No	
	Count	Row %	Count	Row %
Cardiac rehab	141	23%	473	77%
Respiratory disease	53	9%	561	91%
Cancer	106	17%	508	83%
Obesity/Diabetes	255	42%	359	58%
Frailer older adults	84	14%	530	86%
Stroke	81	13%	533	87%
Accelerated Rehabilitation Exercise	31	5%	583	95%
Long-term neurological disease	61	10%	553	90%
Mental health	97	16%	517	84%
Falls prevention	76	12%	538	88%
Other Level 4 training	131	21%	483	79%

N=614

5.2.9 Plans for Continuous Professional Development

The options presented for potential CPD were wider and more varied than for the training options. The key points are that:

- About a third of those planning to undertake CPD plan to train in First Aid (33 per cent).
- Just over a quarter are planning to undertake CPD in Group Exercise and Functional training

Table 5.2j Plans for CPD

	Yes		No	
	Count	%	Count	%
Choreography	170	12%	1258	88%
Group Exercise	389	27%	1039	73%
Circuit	159	11%	1269	89%
Small Equipment	157	11%	1271	89%
Functional Training	381	27%	1047	73%
Business Skills	154	11%	1274	89%
Customer Service	39	3%	1389	97%
Exercise, Movement and Dance	218	15%	1210	85%
Working with Disabled People	123	9%	1305	91%
First Aid	469	33%	959	67%
Funding/ Grant Applications	63	4%	1365	96%
Behaviour Management	84	6%	1344	94%
Administration	35	2%	1393	98%
Marketing	120	8%	1308	92%
Health and Safety/Risk Assessments	86	6%	1342	94%
Safeguarding/Child Protection	87	6%	1341	94%
Other CPD	247	17%	1181	83%

N=1,428

5.2.10 Reasons for not doing more training

Finally in this section, we asked respondents what the main reasons were for them not undertaking more training. Figure 5.2h shows that cost is the most significant issue, with 62 per cent of people saying this was the reason they don't train more. The next two most popular reasons are not being able to find the time to train (24 per cent) and the lack of suitable training available (19 per cent).

Figure 5.2h Reasons for not doing more training

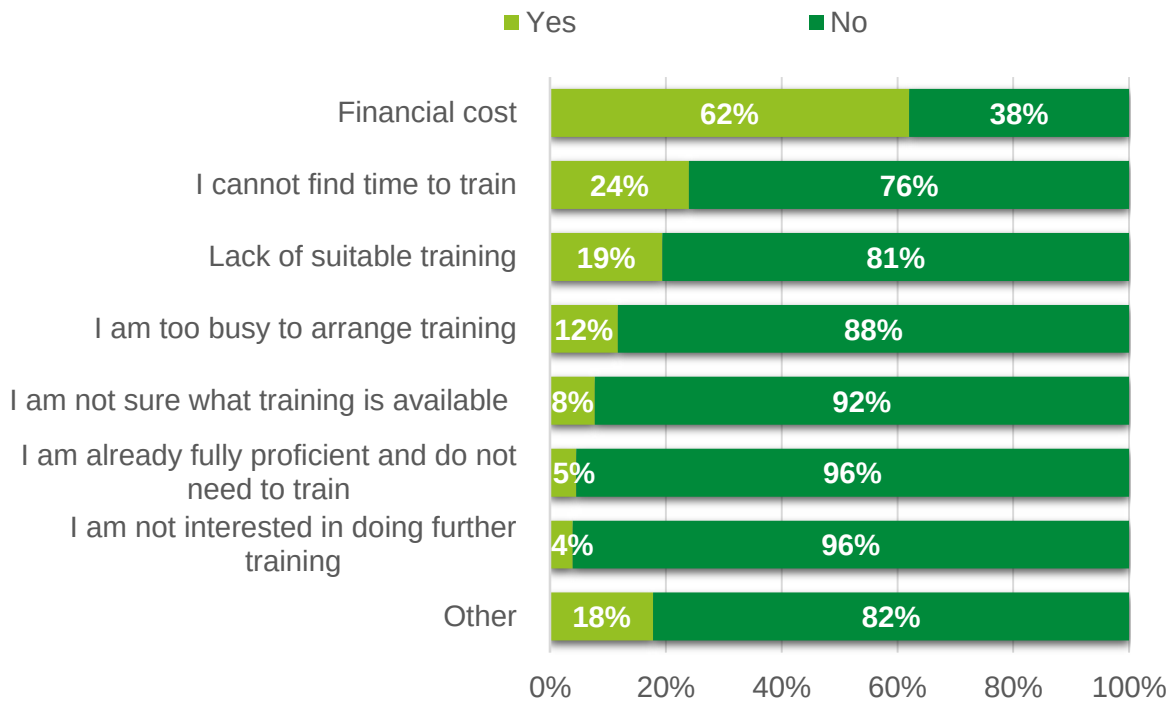


Table 5.2k shows that Dance Fitness professionals are the least likely to cite financial cost as a barrier to training whilst Directors/managers are the most likely to say that they cannot find the time to train. Exercise Referral specialists are slightly more likely to say that they cannot find suitable training.

Table 5.2k Reasons for not training by occupation

	D/M	Other	GI	AI	PT	GE	SC	DF	Y/P	ER
Financial cost	53%	57%	66%	58%	71%	68%	69%	47%	60%	57%
Lack of suitable training	22%	21%	10%	16%	17%	16%	24%	21%	25%	29%
I cannot find time to train	39%	22%	20%	16%	21%	25%	29%	23%	24%	33%
I am too busy to arrange training	16%	12%	9%	9%	12%	10%	14%	9%	13%	17%
I am not sure what training is available	10%	5%	16%	9%	7%	8%	12%	9%	5%	2%
I am already fully proficient and do not need to train	3%	3%	4%	3%	4%	5%	4%	8%	4%	6%
I am not interested in doing further training	4%	4%	2%	6%	3%	3%	8%	9%	1%	3%
Other	12%	21%	18%	21%	16%	13%	4%	27%	22%	11%

N=1,810. D/M=Director/Manager, GI=Gym Instructor, AI=Advanced Instructor, PT=Personal Trainer, GE=Group Exercise/Aqua, SC=Sports Coach, DF=Dance Fitness, Y/P=Yoga/Pilates and ER=Exercise Referral.

Interestingly, Table 5.2l shows that those who are *not* planning to train are less likely to cite any of the barriers listed than those who *are* planning to train.

Table 5.2l Barriers to training for those not planning to train

	Not planning to train	Planning to train	Total
Financial cost	48%	65%	62%
Lack of suitable training	17%	20%	19%
I cannot find time to train	22%	25%	24%
I am too busy to arrange training	10%	12%	12%
I am not sure what training is available	10%	7%	8%
I am already fully proficient and do not need to train	12%	3%	5%
I am not interested in doing further training	13%	2%	4%
Other	17%	18%	18%

N=343 for not planning to train and N=1,467 for planning to train

6 Professional Membership

Key points

The large majority of respondents are members of the Register of Exercise Professionals (89 per cent), with two thirds on the Register at Level 3. Dance fitness professionals are most likely to be members at Level 3 (69 per cent). This latter figure is driven by founder members, 92 per cent of whom are on the Register at level 3. Non-founders are most likely to be on the Register at Level 2 (47 per cent).

Group Exercise professionals who are not members of the EMDP are most likely to be members of the Zumba Instructor Network.

People are most likely to say they are members because they have to be (45 per cent) but other popular reasons include discounted insurance (35 per cent) and training/CPD opportunities (34 per cent).

REPs members think that it is important for their clients to be informed about their industry recognised qualifications (71 per cent). However, a very similar proportion say that their clients don't ask to see their REPs membership.

Most non-EMDP members haven't heard of the EMDP (77 per cent). Nearly two thirds of those who are dance fitness teachers and are not members of EMDP say that they would be interested in joining a dance body to help them with their Dance Fitness requirements.

This section of the report looks at the prevalence of and reasons for professional membership.

6.1 Incidence of Professional Membership

The respondents to this survey are predominantly members of the Register of Exercise Professionals. Only 8 per cent are members of the Exercise, Movement and Dance Partnership, although this represents about half (51 per cent) of EMD teachers (main role). This has been affected by the high response rate of EMDP

founder partners to the survey. After REPS, people are most likely to be members of Fit Pro (13 per cent). This is driven by Group Exercise/Aqua teachers, 24 per cent of whom are members of this body.

Table 6.1a Membership of professional bodies

	Count	%
REPS	1,603	89%
CIMSPA	13	1%
FIA	28	2%
CLOA	3	0%
Society of Sports Therapists	14	1%
BACR	47	3%
BASES	28	2%
EMDP	136	8%
SMA	12	1%
BWY	34	2%
Fit Pro	244	13%
I am not a member of any sport/fitness related organisations	102	6%
Other	281	16%

N=1,810

Group Exercise/Aqua teachers who teach dance fitness classes but are not members of EMDP were asked which other dance bodies they are affiliated to. Table 6.1b shows that people are generally either members of the Zumba® Instructor Network or else are not members of any other body.

Table 6.1b Membership of other dance bodies

	Count	%
Zumba® Instructor Network (ZIN)	55	42%
The Register of Dance Teachers, Leaders and Artists	0	0%
Foundation for Community Dance (FCD)	0	0%
Imperial Society of Teachers of Dancing (ISTD)	4	3%
Royal Academy of Dance (RAD)	2	2%
Council for Dance Education and Training (CDET)	0	0%
National Dance Teachers Association (NDTA)	0	0%
None of these	56	42%
Other	15	11%

N=132

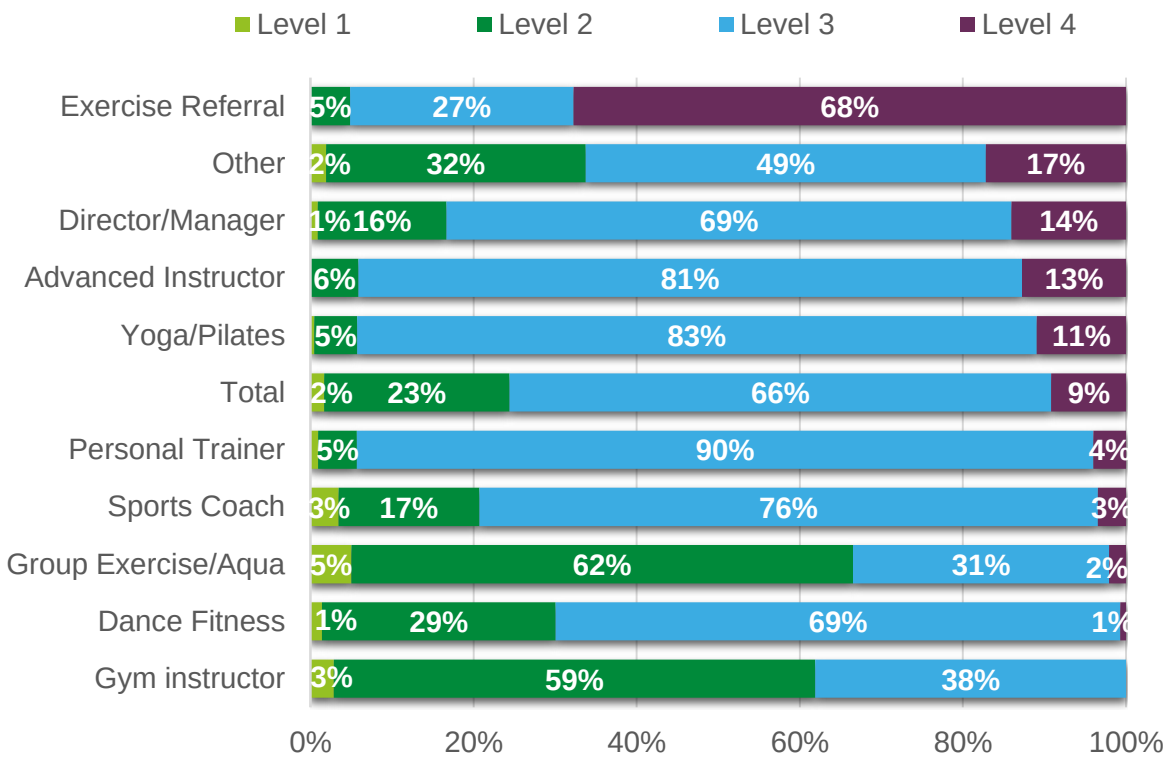
6.2 Level of REPs membership

Those who are REPs members were asked what level they were on the Register. Nearly a quarter of those who responded are at Level 2 on the Register (23 per cent), whilst most (two thirds, or 66 per cent) are at Level 3. Dance fitness professionals are most likely to be members at Level 3 (69 per cent). This latter figure is driven by founder members, 92 per cent of whom are on the Register at level 3. This falls to 42 per cent of non-founders. Non-founders are most likely to be on the Register at Level 2 (47 per cent).

Figure 6.2a shows how REPs membership level breaks down across all occupations:

- Exercise Referral specialists are significantly more likely than other occupations to be on the Register at Level 4 (68 per cent)
- Group Exercise/Aqua and Gym Instructors are most likely to be members at Level 2 (62 per cent and 59 per cent).

Figure 6.2a REPs membership level by occupation



N=1,603

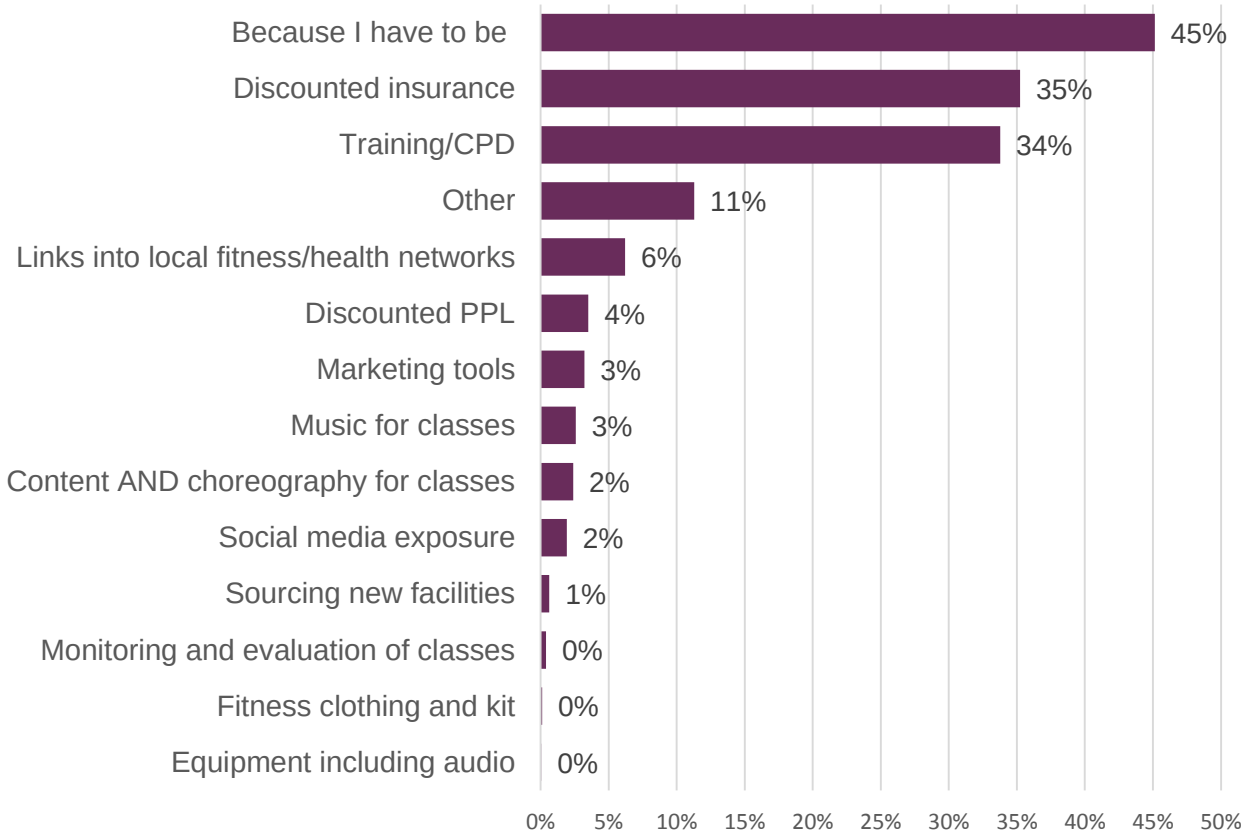
6.3 Reasons for Professional Membership

Respondents were asked what their main reasons were for joining the professional body of which they are a member. They were presented with a list of predetermined answers but were also given an opportunity to say something else.

Figure 6.3a shows that there a three main reasons why respondents are members of a professional body:

- The most popular 'reason' is coercion, i.e. they are members because they are required to be by the terms of their licence (45 per cent). This ranges from 65 per cent of Sports Coaches and 64 per cent of Exercise Referral specialists to 38 per cent of those working in Dance Fitness.
- The second two most popular reasons were cited by approximately a third of respondents – discounted insurance (35 per cent) and training/CPD (34 per cent). Advanced Instructors and Personal Trainers are most likely to say insurance services (41 per cent) whilst Gym Instructors are most likely to say training/CPD (43 per cent).
- Those employed full-time are more likely than the self-employed to say they have to be members (58 per cent compared to 39 per cent).

Figure 6.3a Reasons for Professional Membership



6.4 REPs attitude statements

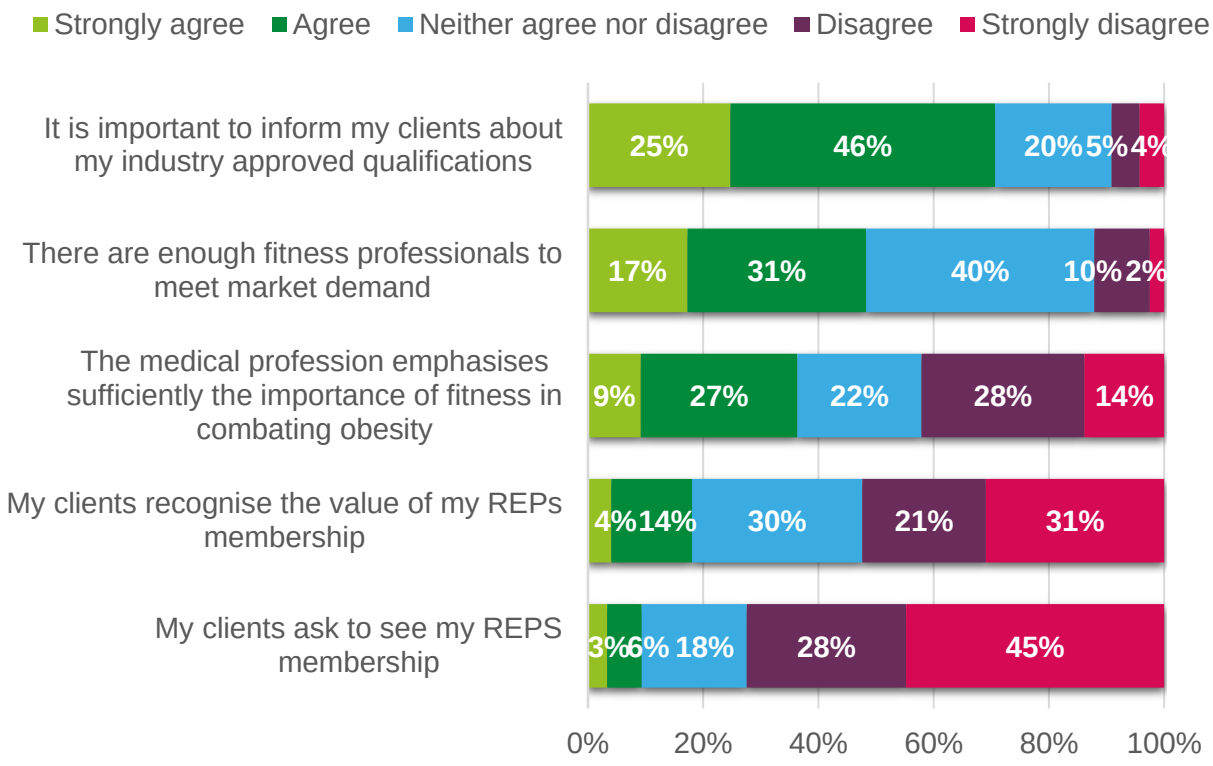
All the members of REPs who responded to the survey were asked a series of attitude statements about the value of their REPs membership. Figure 6.4a shows that people are most likely to be negative about factors that relating to their clients:

- 72 per cent either disagree or strongly disagree that their clients ask to see their REPs membership, whilst
- Over half (52 per cent) either disagree or strongly disagree that their clients recognise the value of their membership.

However:

- REPs members are most likely to agree that their clients should be informed about their industry approved qualifications (71 per cent agree or strongly agree) and
- Nearly half (48 per cent) either agree or strongly agree with the statement that there are not enough fitness professionals to meet market demand.

Figure 6.4a REPs attitude statements



7 Satisfaction and future plans

Key points

Fitness professionals are most likely to have joined the industry because they have a passion for fitness (70 per cent) and because they wanted to be a help to other people (44 per cent).

Many respondents to the survey have been in the industry a long time – 40 per cent have been in the sector for more than 10 years whilst a further fifth (18 per cent) have been in the sector for between 5 and 10 years. EMPD founder members are more likely to have been in the industry for over 10 years – 78 per cent compared to 42 per cent of non-founder members.

Nearly two thirds (62 per cent) say that they plan to stay in the industry for more than 5 years, but a quarter said they don't know how long they'll stay

The top three reasons given as to why people will leave the sector are either directly or indirectly related to income. The most oft cited reason given is the low income earned in the sector (45 per cent) followed by a lack of new clients (31 per cent) and rising costs (27 per cent).

When asked about their satisfaction with various aspects of their role, employed people are most likely to be negative about their remuneration package and their prospects for progression.

A quarter of those who don't currently teach Dance Fitness say they would be either very or quite interested in doing so in the future (27 per cent).

A key part of the Working in Fitness survey is about understanding what motivates people to both join and leave the industry. To understand this better, we ask respondents a series of questions about when they joined the industry, how long they plan to stay in the industry, and what kinds of things might make them leave the industry.

Before we come to these questions, we look at where people were working before they came into the industry and what attracted them to a career in fitness.

7.1 Previous employment

People are most likely to have come into the fitness industry from an environment away from the sector (51 per cent) whilst a further 12 per cent say that they are teaching fitness in addition to another career. Nearly 1 in 10 said that they were a student in ta fitness related subject, which is positive if this means those newly acquired skills are implemented in practice within the sector.

Table 7.1a Previous employment

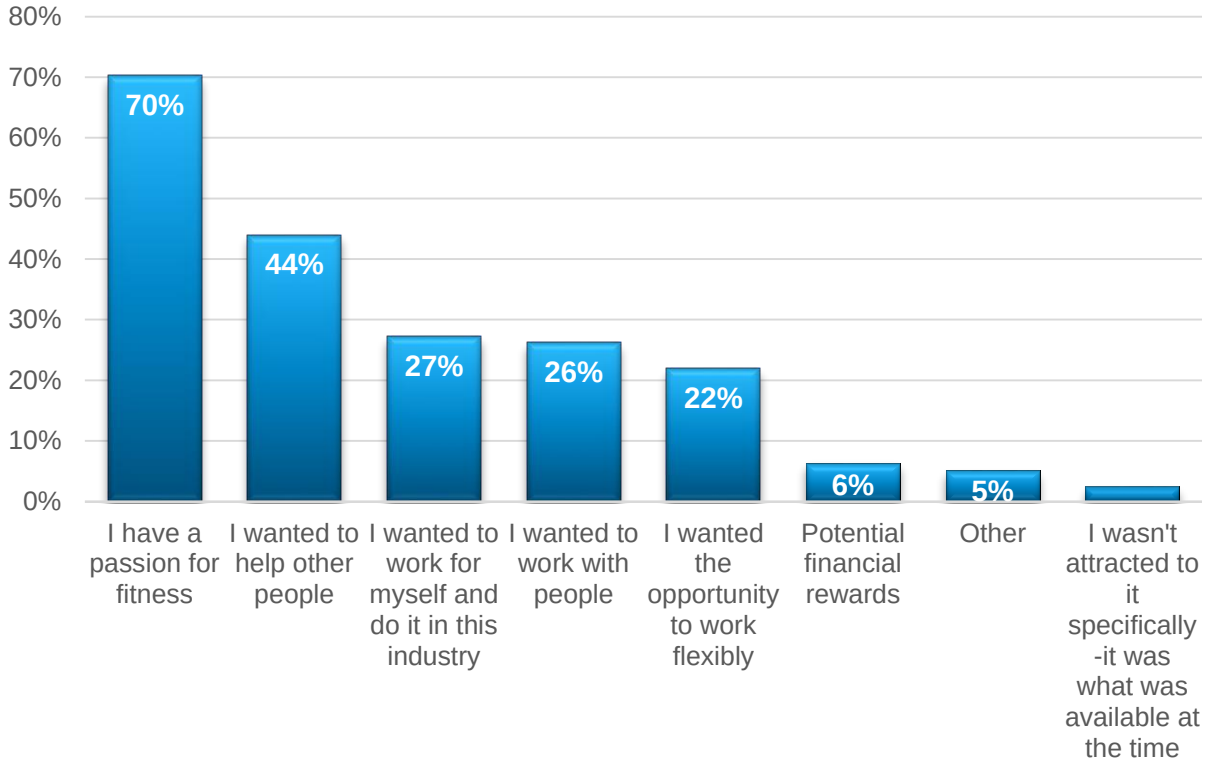
	Count	%
I worked in an environment away from the fitness industry	925	51%
I am teaching fitness in addition to my non-fitness related career	215	12%
I was a student in a fitness related subject	163	9%
Other	150	8%
I worked in an environment that was linked to the fitness industry	116	6%
I was a full time parent/carer	100	6%
I am teaching fitness in addition to my fitness related career	71	4%
I was a student in a non-fitness related subject	46	3%
I was unemployed	24	1%

N=1,810

7.2 Reasons for joining the industry

This year, people were asked for the first time why they joined the fitness industry. Figure 7.2a shows that people are most likely to say that they joined because they have a passion for fitness (70 per cent). The second most popular reason given is an altruistic one – they wanted to be a help to other people (44 per cent). This could be in part to do with the high profile the sector has been given in tackling obesity. Another reason given surrounds working flexibly (22 per cent) which is made easier in self-employment (27 per cent). Overall, people have made a positive choice to come into the fitness sector. Only 3 per cent said they came in to the industry because it was all that was available at the time.

Figure 7.2a Reasons for joining the fitness industry



7.3 Length of time in the industry

People in the industry say they have a passion for fitness, and this is no better illustrated than by Figure 7.3a, which shows that people are likely to have worked in the fitness industry for a fairly long time. Across all occupations, 40 per cent have worked in the industry for over 10 years, whilst a further fifth (18 per cent) have been in the industry for over 5 years.

Nearly 9 in 10 (87 per cent) Exercise Referral specialists have worked in the industry for over 5 years, with three quarters having been in the sector for over 10 years. Gym Instructors and Personal Trainers are the least likely to have been in the industry for a long time, with both occupations having approximately a quarter of their workforce in the industry for less than a year (24 per cent and 23 per cent respectively).

Figure 7.3a Length of time in the dance/fitness industry

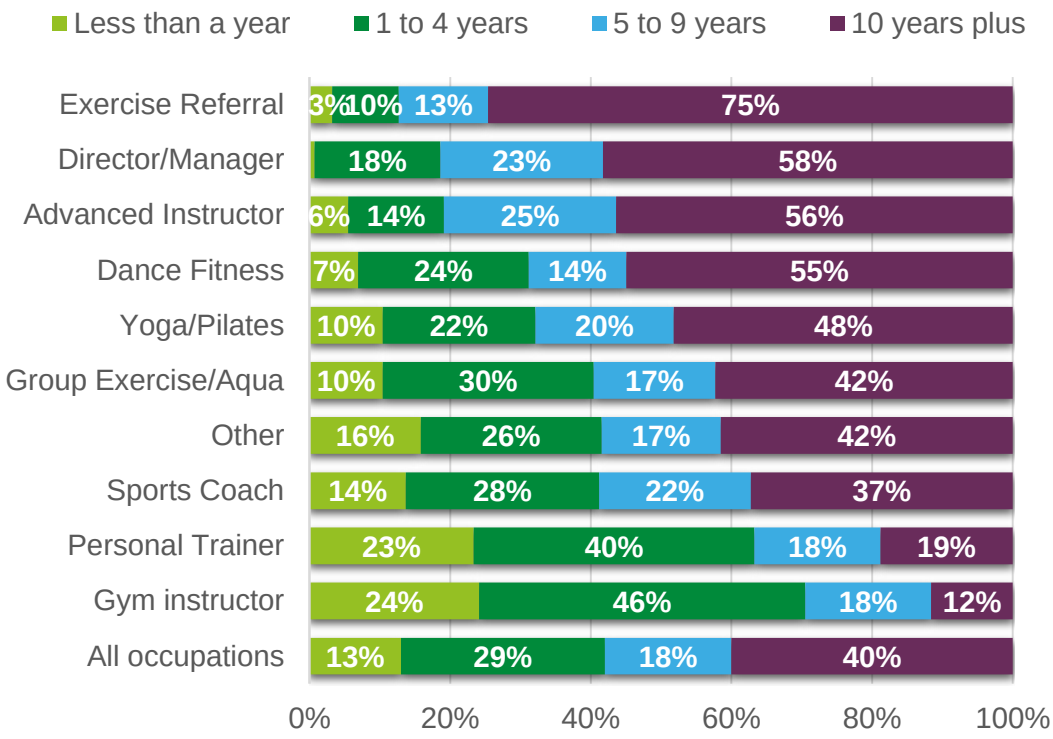
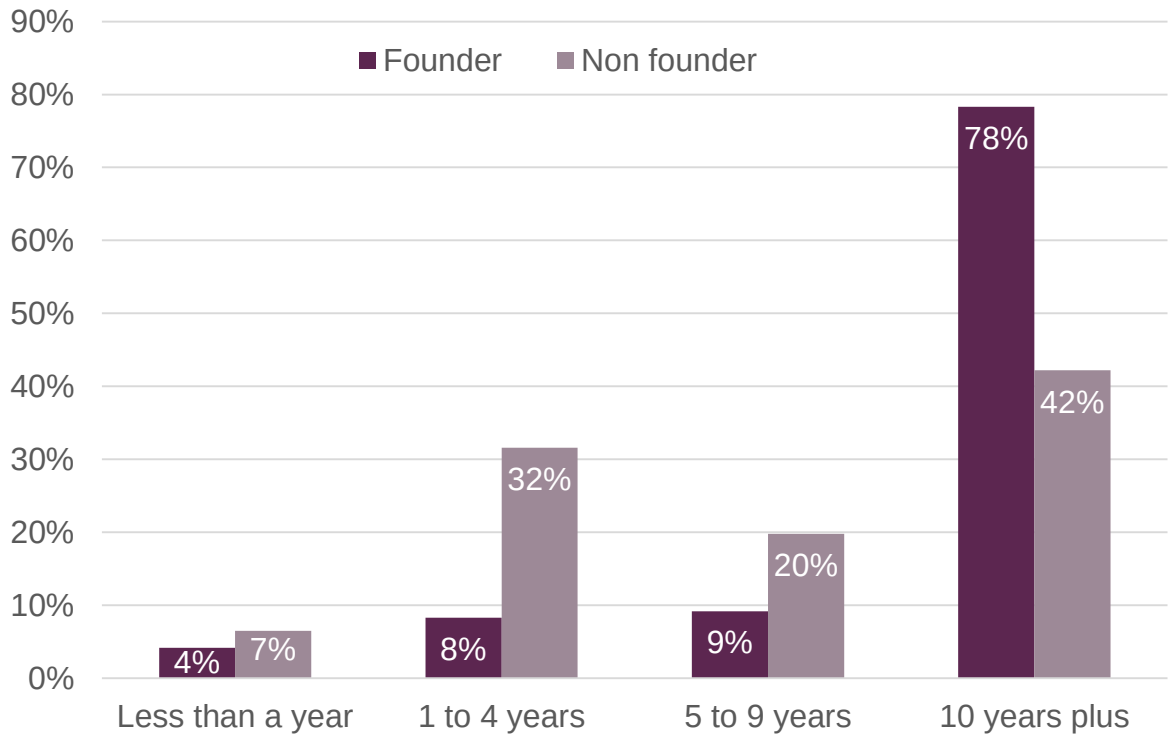


Figure 7.3b shows the differences between founder and non-founder members of EMDP. It shows that founder members are more likely to have been in the industry for over 10 years – 78 per cent compared to 42 per cent of non-founder members.

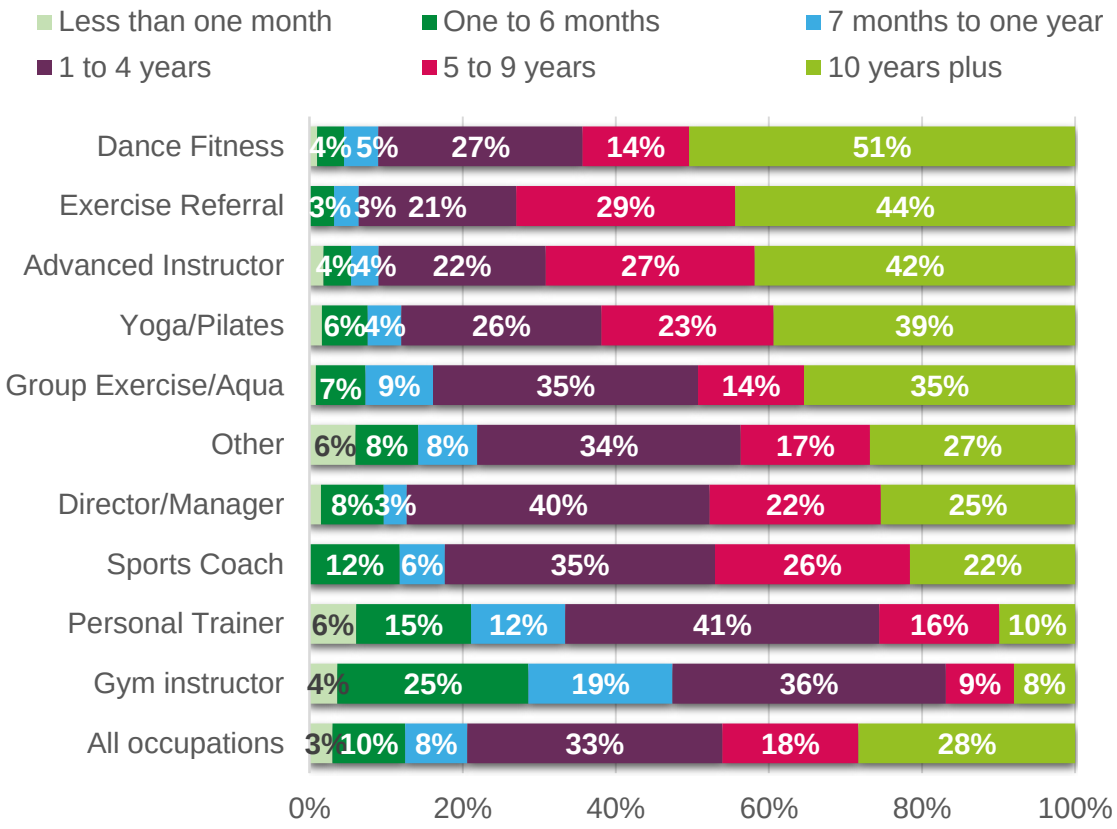
Figure 7.3b Length of time in industry - founder vs non-founder members



7.4 Length of time in current role

Dance Fitness professionals are the most likely to have been in their current role for more than 10 years (51 per cent). Approximately a fifth of the sample (21 per cent) have been employed in their current role for less than a year.

Figure 7.4a Length of time in current role



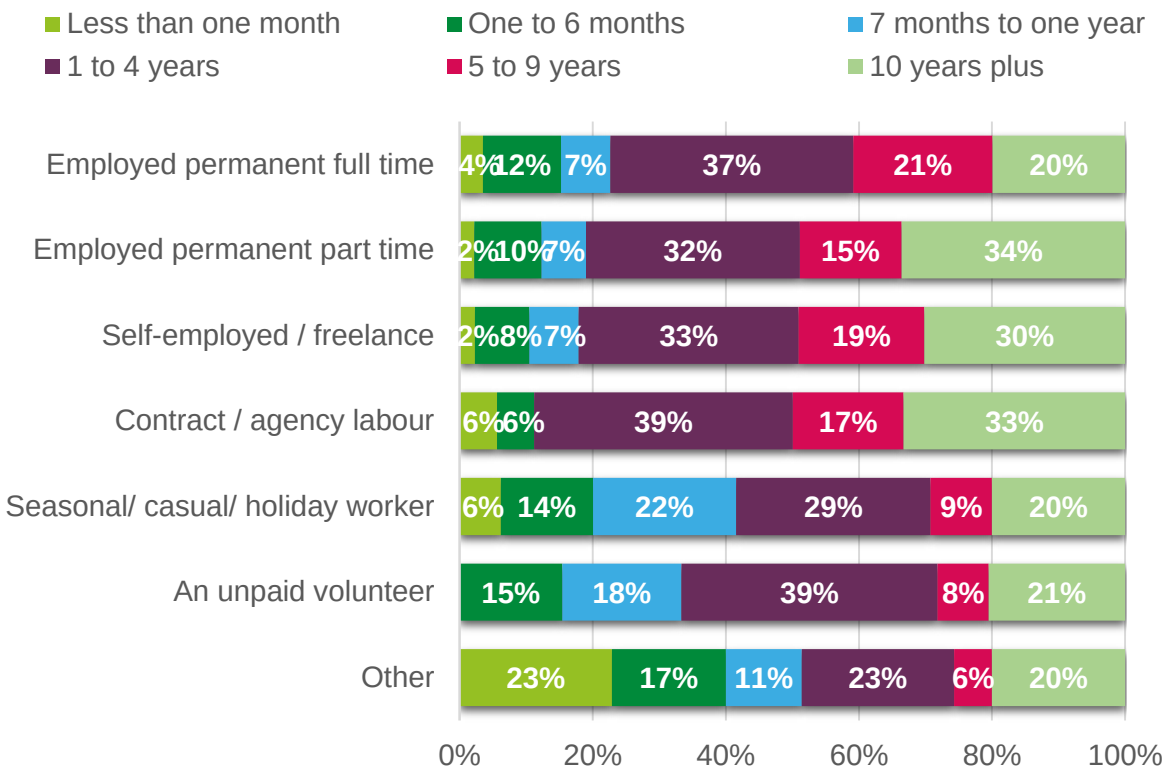
7.4.1 Founder members vs non founder members

Founder members are also more likely to have been in their current role for longer than founder members. Three quarters of founder members (74 per cent) have been in their role for more than 10 years compared to only 31 per cent of non-founder members.

7.4.2 Length of time in current role by employment sector

It could be predicted that those in self-employment are more likely to have been in their current role for a longer period of time, given that they technically cannot ‘move’ employers. However, Figure 7.4b shows that there are few discernible patterns present when looking at length of time in a role by employment sector. For example, those employed in a permanent part-time position in the sector are more likely to have worked in their current role for over 10 years than the self-employed (34 per cent compared to 30 per cent).

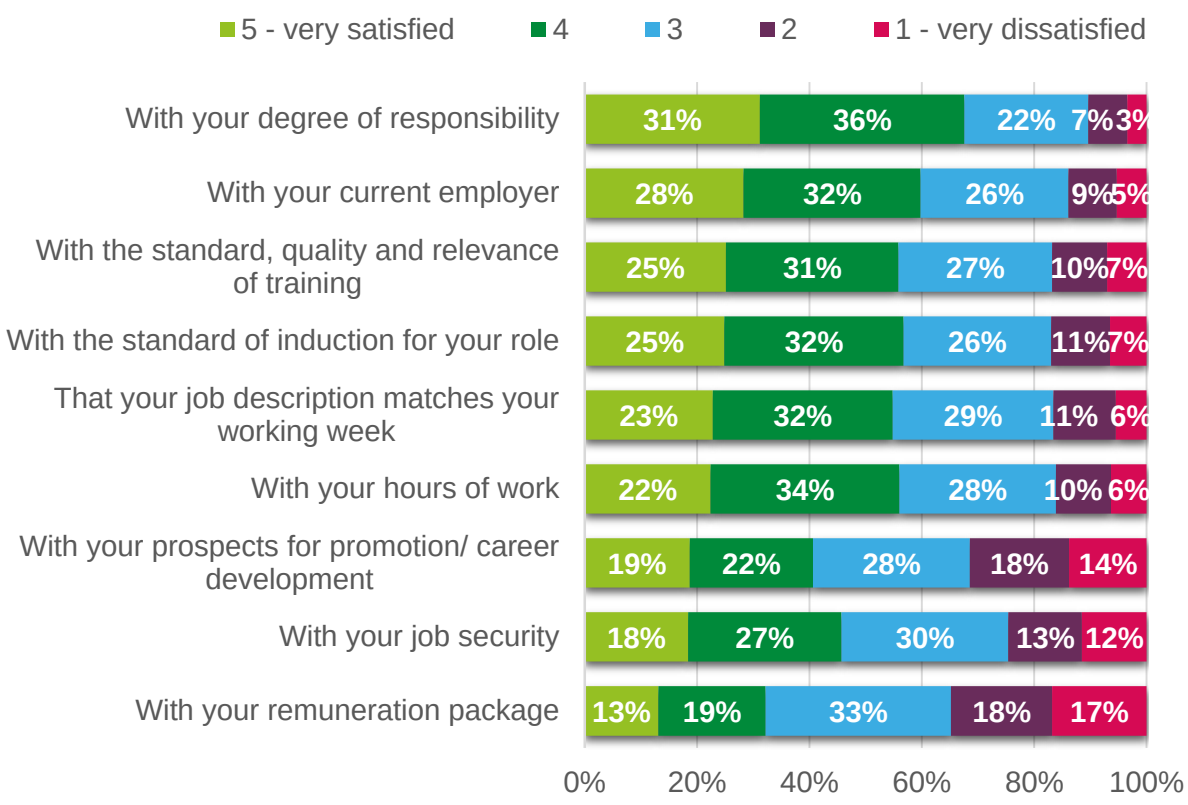
Figure 7.4b Length of time in current role by employment sector



7.5 Satisfaction with current role

Those who are employed were asked about their satisfaction with different aspects of their current role. People are most likely to be satisfied with their degree of responsibility and their current employer (31 per cent and 28 per cent are very satisfied). People are least likely to be satisfied with their remuneration package, their level of job security and their prospects for career development.

Figure 7.5a Satisfaction with aspects of current role

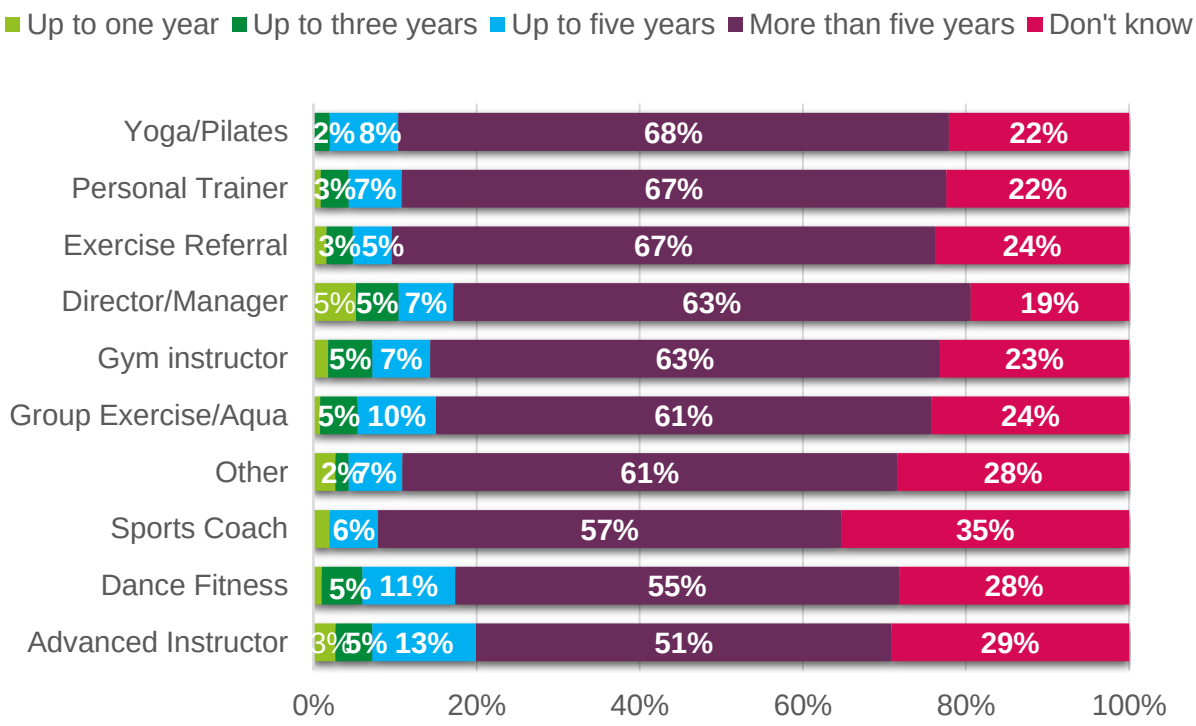


N=696

7.6 Future plans

Overall, a quarter of the sample said that they didn't know how long they planned to stay in the industry. However, of those that did give an answer, most were likely to say that they planned to stay in the sector for more than 5 years. Those that plan to stay for more than 5 years ranges from 68 per cent of Yoga/Pilates teachers to 51 per cent of Advanced Instructors.

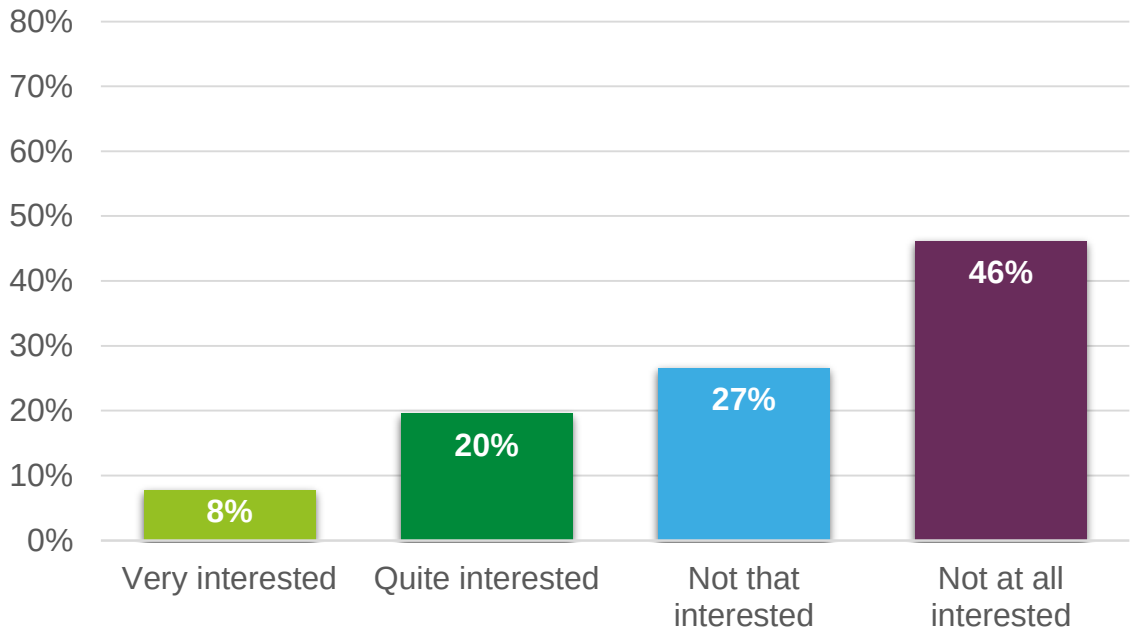
Figure 7.6a How long planning to stay in the industry



7.6.1 Whether interested in teaching dance fitness

Those who do not currently teach dance fitness were asked how interested they would be in teaching dance fitness in the future. Figure 7.6b shows there is a progression towards the majority who say they wouldn't be interested in teaching dance fitness in the future. Notwithstanding, over a quarter (27 per cent) say they would be either very or quite interested in teaching this subject.

Figure 7.6b Whether interested in teaching dance fitness

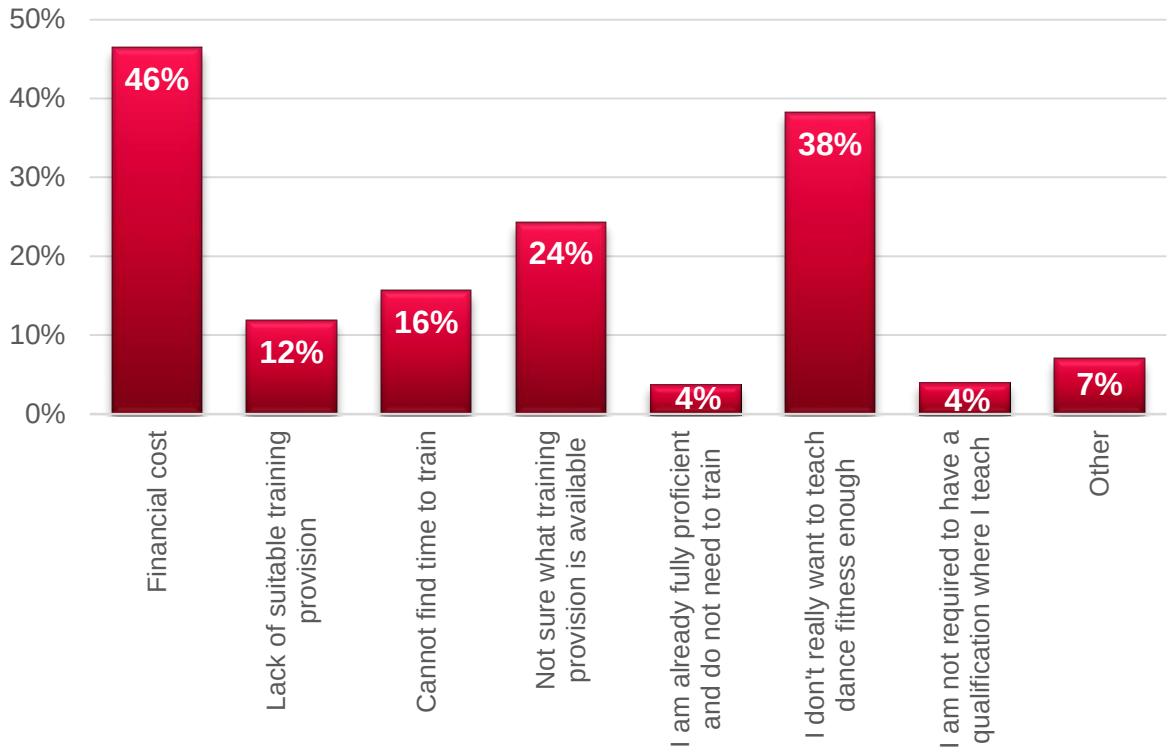


N=1,427

7.6.2 Barriers to teaching dance fitness

All apart from those who said they were not at all interested in teaching dance fitness in the future were asked what the barriers would be to doing so. The two most cited reasons are cost (46 per cent) and a lack of desire to teach dance fitness (38 per cent). Significantly, about a quarter (24 per cent) say that they don't know what training provision is available, which signals a potential role for EMDP.

Figure 7.6c Barriers to teaching dance fitness



7.7 Reasons for leaving the fitness industry

Having asked respondents what attracted them into the fitness industry, we finally asked them what factors might make them leave the industry. The top three reasons are either directly or indirectly related to income. The most oft cited reason given is the low income earned in the sector (45 per cent). Linked to this is a lack of new clients (31 per cent) and rising costs (27 per cent). In 2012, unsociable hours was the second most popular reason given after low pay.

Encouragingly, given the economic circumstances, only 9 per cent of people say they think they will leave the industry because of the end of a contract or redundancy. This is down from 14 per cent last year.

Figure 7.7a Reasons why leave the industry