



# EUROPEAN REPORT ON SKILLS NEEDS IDENTIFICATION

Situation, trends, perspectives and priorities for the sport and physical activity sector





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## **FOREWORD**

ESSA-Sport has been the start of a journey to reform and modernise training and qualifications and re-skill the workforce in a sport and physical activity sector that has the potential to make a significant economic, health and social impact across the European Union.

We are delighted to provide the foreword to this European Report which has been produced at the conclusion of the ESSA-Sport project. EOSE has been active in the field of sport and education and more specifically skills development for over fifteen years and this initiative has been the most extensive and ambitious collaborative project in our history.

Sport and physical activity has the power to change lives, create jobs, develop people, improve health, and support community development and cohesion. Given this enormous potential, it is vital that the sector has a competent workforce of paid staff and volunteers with the right skills, as well as a clear career structure and pathways with job opportunities.

We believe the way to achieve this is through new levels of cooperation between the worlds of education and employment and through fit for purpose qualifications and training offers that can equip people to work in the sector with the skills required by the growing and evolving labour market.

The origins of a coordinated study in to skills in the sport and physical activity sector go back to 2014 when the need for such a project was established in a European Feasibility Study funded by the Directorate-General for Employment, Social Affairs and Equal Opportunities (DG EMPL) within the European Commission. This Study strongly demonstrated the need and support from the stakeholders of the sector for an initiative which would provide a coordinated approach to analysing the changing labour market and developing solutions to reskill the workforce with modern, fit for purpose training and qualifications. This would be the first detailed analysis of employment and skills covering the whole sport and physical activity sector since EOSE published the VOCASPORT report<sup>1</sup> in 2004.

Fast forward to 2016 and a consortium of 18 national partners and 5 European networks, with EOSE acting as applicant and coordinator, successfully applied for funding through the Erasmus+ programme of the European Union (Key Action 2 — Sector Skills Alliances for skills needs identification, Lot 1) to deliver this ambitious and challenging project entitled ESSA-Sport - "A European Sector Skills Alliance for Sport and Physical Activity".

This three-year funded project, which concluded in October 2019, provided a unique opportunity to engage the whole sport and physical activity sector at both the EU and national level. The aim was not only to undertake a real analysis of labour market and skills needs for the whole sector, and to identify realities and challenges facing the sector, but also to create a sector response as the basis for action and reform.



We are proud that the ESSA-Sport project delivered a number of firsts for the sector. The consortium has achieved the first European map of employment through ground breaking work to analyse European and national sport labour market statistics. The project also delivered the first ever Europe-wide online employer skills survey covering the whole sport and physical activity sector which gathered nearly 4,000 responses from sport employers in Europe. This confirmed the strong interest from the sector around the topic of skills needs and development.



We also have to highlight the work that took place at the national level in 20 countries through the network of national coordinating partners. In addition to this European Report, the consortium has produced National Reports that provide a detailed analysis of sport and education at the national level, as well reporting on extensive consultations with national stakeholders and proposing national conclusions and recommendations/ actions. The project could not have been successfully concluded without the dedication and hard work of the national coordinators and we thank them for their important contribution to the development of the sector through their work in the project.

A final innovation within the project was the first ever EU Sport Skills Summit which took place in Helsinki (Finland) on the 7th and 8th of October 2019 as a side event of the Finnish Presidency of the Council of the European Union. The event was fully booked and drew 82 participants from 24 countries demonstrating the interest and commitment across Europe to tackling skills and employment challenges.

Looking to the future, we believe the sector now has an obligation and a mission to continue the journey towards a skilled and competent workforce, and must act on the conclusions and concrete recommendations of the project which will help the sector to reach its full economic and social potential.

You can be sure that EOSE will play its part and continue to bang the drum for skills development and the promotion of sport in and through education at all levels. We are planning to monitor the implementation of identified priority actions arising from the ESSA-Sport project and seek to repeat some of the research elements in future years through new collaborative projects and initiatives.

We are pleased to present this new knowledge for the sport and physical activity sector and we hope you will gain new insights through this European Report; we wish you well in supporting skills and workforce development in whatever role you have in the amazing sport and physical activity sector.



Aurélien FAVRE EOSE Executive Director



Ben GITTUS
EOSE Director of Standards

<sup>&</sup>lt;sup>1</sup> VOCASPORT (2004) — "Vocational Education and Training related to Sports in Europe: situation, trends and perspectives" — European project led by a consortium composed EOSE, ENSSEE and EZUS Lyon and funded by the European Commission (DG Education and Culture)



# **ACKNOWLEDGEMENTS**

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EOSE would like to take this opportunity to express its gratitude to all of our partners and members who have played an active role in the delivery of the ESSA-Sport project.

We would like to thank everyone who took part in the project and in particular those who completed a response to the European Employer Skills Survey, those who took part in national or European consultation activities and those who attended as participants or key note speakers the first ever European Sport Skills Summit organised in Helsinki in October 2019.

A special thank you goes to the Finnish Presidency of the Council of the European Union for having hosted as a side event of their Presidency this European Sport Skills Summit.

A warm thank you message is of course dedicated to the project official and associate partners who took on the role of National Coordinator or European Association partner. The work carried out at the national level was immense and the dedication and commitment of partners during this three-year project ensured a high level of engagement with key stakeholders in each country and the successful delivery of all expected activities.

A thank you is also given to the European Commission for the opportunity to implement such an ambitious and important transnational initiative for the whole sport and physical activity sector.

All this work would not have been possible without the active support, commitment, contribution and involvement of all these stakeholders.

This engagement lays the foundations of future collaboration and action on skills development.

## **PARTNERSHIP**



















































# **EXECUTIVE SUMMARY**

#### **BACKGROUND TO THE ESSA-SPORT PROJECT**

The aim of the ESSA-Sport project, funded by the European Commission under the Erasmus+ programme, was to establish a European Sector Skills Alliance covering the full breadth of the sport and physical activity sector across the European Union.

The 3-year ESSA-Sport project, which began in November 2016, aimed to create a knowledge base and plan for action within the sector on the key issues of skills and workforce development which are central to helping the sector grow, to equip those working or volunteering with the right skills and to enable the sector to fulfil its potential as a social, health and economic driver.

The consortium, composed of 20 national coordinators and 5 European networks, is proud to have generated new knowledge, statistics and data as well as consultation activities at all levels to support policy and priority actions in the sport and physical activity sector to respond to the identified challenges.

#### THE EUROPEAN REPORT

The European Report has been developed by taking into consideration contributions from National Coordinators, inputs from consultation and results from the research activities. It discusses sport and education in Europe and presents the main findings collated and analysed through the ESSA-Sport project at the European level.

#### THE EUROPEAN SPORT AND PHYSICAL ACTIVITY SECTOR

This section of the European Report covers the background to sport in the European Union including the recent history of the involvement of the European Commission in sport. This begins with the 2007 White Paper on Sport and includes the key topics of the EU Work Plan for Sport 2017 – 2020, high level and grassroots sport initiatives of the EU and priorities of the Sport Chapter of the Erasmus+ programme. This section also covers sport participation in the EU taken from Special Eurobarometer 472.

Analysis at the national level, drawing from ESSA-Sport national reports which were developed by project partners acting in a national coordinating role, explores key themes and trends related to the role of the Ministry responsible for sport; national strategies for sport; laws relating to sport; role of main stakeholders; funding of sport; economic impact of sport; the link to other agendas such as health or social policy; the voluntary sector; and provision of sport facilities.

#### SPORT LABOUR MARKET STATISTICS AT THE EUROPEAN LEVEL

The overall objective of this work carried out through ESSA-Sport was to collate available data and official statistics on the sport and physical activity labour market in all individual European Union Member States and for the European Union as a whole.

EOSE has entered into dialogue with the European statistics agency Eurostat to explore the possibility to gather and collate available and consistent data from the European-wide Labour Force Survey.

To summarise the overall process, the work carried out through the ESSA-Sport national desk research and in collaboration with Eurostat and National Statistics Offices (NSO) was to collate available data and statistics on the number of:

- Persons having a sport-fitness occupation (ISCO 342) in an organisation whose main business is the provision of sport (NACE 93.1), e.g. professional athletes, coaches, instructors
- Persons having a non-sport and fitness occupation (Other ISCO codes) in an organisation whose main business is the provision of sport (NACE 93.1), e.g. managers, receptionists
- Persons having a sport and fitness occupation (ISCO 342) in an organisation whose main business is not the provision of sport (Other NACE codes), e.g. a fitness instructor working in a hotel

The ambition was to collate such data but also to try to breakdown these statistics about the sport labour market by gender, age, level of education, type of employment (employed or self-employed) and type of working contract (full-time or part time).

Some highlights from the collated research which are explored in this section of the European report are:

- A growing European Union Sport Labour Market in numbers
- A growing sector versus European Union total employment (proportion)
- Differences between countries
- Main characteristics:
  - More male than female as paid staff
  - Growing proportion of youth and 50 years+
  - High percentage of people on part-time contracts
  - High percentage of self-employed people versus EU average
  - More workers with higher education qualifications than the EU average and less with low level of qualification
  - 48.4% of sport and fitness occupations outside sport organisations

# **EXECUTIVE SUMMARY**

#### **EDUCATION AND TRAINING IN EUROPE**

This section of the European Report discusses developments in Europe and at the national level around education and training. This includes the European tools and principles: European Qualifications Framework (EQF), European credit system for vocational education and training (ECVET), Europass, European quality assurance framework for vocational education and training (EQAVET), Validating non-formal and informal learning, Lifelong guidance and counselling, and ESCO, the European Skills, Competencies and Occupations taxonomy.

Common themes in education at the national level are also discussed in this section including the role of the responsible ministry, school systems, higher education, vocational education and training, quality assurance, national qualifications frameworks and apprenticeships.

#### **SPORT AND EDUCATION**

This section begins by discussing developments at the European level, particularly the involvement of the European Union in sport education, and a summary of the Lifelong Learning Strategy for Sport and Physical Activity (7 Step Model) which has been used for skills and workforce development in several parts of the sport sector in recent years.

Key findings from the ESSA-Sport national reports are also summarised, covering topics of sport in schools, sport qualifications in universities, role of sport federations, vocational qualifications in sport and NΩF, and trends and challenges.

#### FINDINGS FROM THE EUROPEAN EMPLOYER SKILLS SURVEY

The aim of the survey was to gather employer views on the realities and challenges facing the sport and physical activity sector which is growing, changing and becoming increasingly important to the social and economic future of Europe, and to make recommendations for future action

3 812 valid responses were received to the survey, with the highest represented countries being France, Hungary and Denmark. The highest represented types of organisation were sport clubs, sport federations and municipalities.

One of the main outputs of the survey was the formulation of training priorities for eight key occupations in the sport and physical activity sector.

The survey supported the findings of the statistical research related to growth of the sector with most employers increasing the size of their workforce.

A majority of employers have the same expectations of volunteers as for paid staff.

Some other findings from the Employer Skills Survey:

- § 91.5% agreed it is important that their staff have access to on-going training to keep their skills up-to-date
- § 83.7% agreed more effort is needed to make Sport and Physical Activity more inclusive in attracting participants
- 79.9% agreed universities/training providers should work more closely with sport employers
- 79% agreed the sector is changing and evolving, as a result, the skills needed by those working in the sector will change too
- \$\text{ 71.6% agree the workforce of paid staff and volunteers in the sport and physical activity sector needs to be inclusive
- \$\operatorname{8}\$ 71% find their staff are willing to train and develop themselves
- \$ 56.7% agreed that their staff would benefit from learning experiences in other countries

#### **CONCLUSIONS OF THE ESSA-SPORT PROJECT**

This section of the European Report gathers the main conclusions formulated by the project consortium based on the research work carried out in the project and after a period of consultation which included the first ever European Sport Skills Summit held in Helsinki, Finland in October 2019. Conclusions are gathered under the following main headings:

#### Strong positive messages from the research

- Paid employment in the sector is significant and growing
- The workforce is much larger if volunteers were counted in
- Sport and fitness workers are employed in many other sectors
- Opportunities for paid careers and small business growth
- There is an appetite for professional service and skills development
- Increased knowledge about skills development priorities

# **EXECUTIVE SUMMARY**

#### Mixed messages from the research

- There are wide employment variations between EU countries
- A better educated workforce, but does it have the right skills?
- We know more about what skills are needed
- The sector is more reliant on part-time and self-employed workers than other sectors
- Volunteers make a great contribution, but they also need training
- Many are employed in other sectors, so how do we meet their skills needs?
- Customer service has improved, but customer service skills still need improvement

#### Some challenging messages from the research

- The sector needs a more inclusive workforce
- The workforce is growing older
- Low pay, conditions of service and lack of career opportunities are holding the sector back
- The sector needs to improve human resource management
- Perceived costs of training are still a barrier to skills development
- Education and training providers are not always meeting employers' needs

#### Improving the research and analysis

- The research was judged to be a success overall, but as a first-time exercise, there are inevitably some lessons to be learned

#### **EUROPEAN RECOMMENDATIONS AND ACTION PLAN**

The final section of the report provides recommendations and a suggested action plan for the sector, the main recommendations can be stated as follows:

#### lmproving our knowledge and understanding of the sport and physical activity labour market

- 1.1 Promote collaboration and partnership on skills with partner organisations
- 1.2 Explore the opportunity to undertake the Employer Skills Survey on a regular basis (every two or three years)
- 1.3 Repeat the collection and analysis of National Statistics Office and Eurostat statistics for the sport and physical activity labour market on an annual basis
- 1.4 Undertake research to develop a better understanding of the wide variations in the size of the sport and physical activity labour market in each EU member country as a proportion of each country's total workforce.
- 1.5 Carry out further research to estimate the size and the main characteristics of the volunteer workforce in the sport and physical activity sector across Europe

#### Promoting the value of the sport and physical activity sector

2.1 - Promote the value of the research and the importance of the sport and physical activity sector

#### Promoting a more inclusive workforce for the sector

- 3.1 Research and develop more approaches to attracting females into the sport and physical activity labour market
- 3.2 Research other indicators of inclusion in the sport and physical activity labour market

#### Upskilling and professionalising the workforce

- 4.1 Optimise the training, development and qualification opportunities for potential and current workers in the sport and physical activity sector
- 4.2 Realise the potential of volunteers to deliver services to professional standards and to transition into the paid workforce
- 4.3 Raise customer service standards for all workers in the sector with particular emphasis on customerfacing roles
- 4.4 Promote stronger, sustainable partnerships between employers and universities/training providers at local and regional level
- 4.5 Develop and promote career progression opportunities
- 4.6 Improve human resource management processes to optimise recruitment, retention and career progression
- 4.7 Further develop measures towards learning mobility as a mainstream activity in the sector



#### THE ESSA-SPORT PROJECT

The aim of the ESSA-Sport project, funded by the European Commission under the Erasmus+ programme, was to establish a European Sector Skills Alliance covering the full breadth of the sport and physical activity sector across the European Union.

The project was developed as a direct response to the identified needs and challenges expressed by the sport and physical activity sector through the European Feasibility Study funded by the Directorate-General for Employment, Social Affairs and Equal Opportunities (DG EMPL) and coordinated by EOSE in 2014<sup>1</sup>. The Feasibility Study strongly demonstrated the need to provide the basis for a coordinated approach to analysing the changing labour market and developing solutions to re-skill the workforce with modern, fit for purpose training and qualifications.

The 3-year ESSA-Sport project, which began in November 2016, aimed to create a knowledge base and plan for action within the sector on the key issues of skills and workforce development which are central to helping the sector grow, to equip those working or volunteering with the right skills and to enable the sector to fulfil its potential as a social, health and economic driver.

The overall ambition of this innovative initiative was to create an evidential basis for change and improvement, to create a major consultation on skills, and to build a lasting consultation network at national and European level to take forward the conclusions and recommendations made in national and European Reports. These have long been missing in the sport and physical activity sector and ESSA-Sport provided a unique opportunity to respond to this demand formulated by the sector itself.

The project has identified some main realities in terms of skill needs and future priorities based on a series of national and European level research and consultation activities.

The consortium, composed of 20 national coordinators and 5 European networks, is proud to have generated new knowledge, statistics and data as well as consultation activities at all levels to support policy and priority actions in the sport and physical activity sector to respond to the identified challenges.

#### THE EUROPEAN REPORT

This European Report has been developed by taking into consideration contributions from National Coordinators, inputs from consultation and results from the research activities. It presents the main findings collated and analysed through the ESSA-Sport project at the European level.

The aims of the European Report are:

- To describe sport and education systems across the European Union
- To present new knowledge gathered for the sector in terms of employment and skills
- To propose concrete conclusions and recommendations/ priority actions for implementation at the European level

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<sup>&</sup>lt;sup>1</sup> ESSC-Sport (2014) — "Feasibility of setting up a European Sector Council on Skills and Employment for the sport and active leisure sector" — led by EOSE and funded by the Directorate-General for Employment, Social Affairs and Equal Opportunities (DG EMPL)

See http://eose.org/wp-content/uploads/2014/03/D13\_ESSC\_Detailed\_Final\_Report.pdf

#### **SPORT AND EDUCATION SYSTEMS IN EUROPE**

During the ESSA-Sport project, National Coordinators have undertaken desk research and new consultation activities at the national level to exchange with main national stakeholders (bottom-up approach) on main challenges, trends and realities facing the sector and its labour market, to identify potential priority actions and to develop their detailed National Reports. This European Report contains a mixture of data gathered at the European level and a summary of national level data highlighted through the National Reports.

Firstly, in Section 2 of this report and as an overall introduction, there is a presentation of key political, geographical, economic and population factors for Europe and some information about the principle characteristics of the overall European labour market (not specific to the sport and physical activity sector).

Section 3 focuses on our sector and presents the characteristics, evolution and future perspective of the European sport and physical activity sector/system, through an analysis made at both the European and national level.

An overview of education and training systems in Europe is presented in Section 5 whereas the way education and training is specifically organised in the sport and physical activity sector is presented in Section 6 of this European Report.

#### **SPORT LABOUR MARKET STATISTICS**

Section 4 of the European Report focuses on the work carried out and main findings obtained in an attempt to collate available data and statistics on the European sport and physical activity labour market covering all EU Member States.

Indeed, to make an impact on the sector and allow it to unlock its potential to improve people's lives, it is necessary to have a precise idea of the size and characteristics of the current labour market, and information about changes and tendencies. This information has been missing for many years since the last (partial) attempt to get a European map of employment for the sector took place in 2004 (Vocasport project, EOSE 2004<sup>2</sup>).

The aim of the current initiative was to fill a knowledge gap by undertaking wide research activities at both European and national levels to identify the scale and scope of employment in the emerging and growing sport and physical activity sector.

To summarise, the ambition was to work in collaboration with National Statistics Offices (NSO) and Eurostat to collate available statistics and be able to identify the number of:

- Persons having a sport and fitness occupation (ISCO 3423) in an organisation whose main business is the provision of sport (NACE 93.14), e.g. professional athletes, coaches, instructors in a sport club.
- Persons having a non-sport and fitness occupation (Other ISCO codes) in an organisation whose main business is the provision of sport (NACE 93.1), e.g. managers, receptionists in a sport federation.
- Persons having a sport and fitness occupation (ISCO 342) in an organisation whose main business is not the provision of sport (Other NACE codes), e.g. a fitness instructor working in a hotel.

The ESSA-Sport consortium has been successful in collecting the most relevant NACE and ISCO data related to the sport sector and in obtaining the detailed breakdown listed above, gathered from National Statistics Offices and the European statistics agency Eurostat.

These statistics on the size and characteristics as well as the tendencies of the sport labour market at the European level are presented in section 4.

#### **EUROPEAN EMPLOYER SKILLS SURVEY**

Following the desk research and collection of available statistics for the sport labour market, the focus was then to design and launch the first ever European Employer Skills Survey for the sport and physical activity sector. The objective was to consult the widest variety of employers from the sector and collate data on the labour market, skills needs, gaps and shortages, future tendencies and perspectives, and realities and difficulties to recruit and retain staff and volunteers.

In the context of a dynamic and complex labour market, gathering information on current and future skill needs can support better matching of education, training and employment.

In recent years, better understanding of labour market needs and skills matching have featured prominently on the policy agenda of many countries, driven by both rapid technological advances and global competition. Skills matching can also help reduce unemployment, particularly among young people. It helps to build a better life for individuals by improving employability, social mobility and inclusion.

The ambition through the design and launch of the first ever European Employer Skills Survey for the sport and physical activity sector was to identify and analyse the growing and changing labour market, to build an up to date picture of employment, and to identify the skill needs and future priorities based on national and EU level research — building a skills map for the sector.

The main results and key information from the European Employer Skills Survey, which has been extremely successful with nearly 4,000 contributions from sport employers from all over Europe, are presented in Section 7 of this European Report.

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<sup>&</sup>lt;sup>2</sup> VOCASPORT (2004) — "Vocational Education and Training related to Sports in Europe: situation, trends and perspectives" — European project led by a consortium composed EOSE, ENSSEE and EZUS Lyon and funded by the European Commission (DG Education and Culture)
See http://eose.org/wp-content/uploads/2014/03/vocasport-Final-Report-English-Version.pdf

<sup>&</sup>lt;sup>3</sup> ISCO - "The international standard classification of occupations". ISCO divides jobs into 10 major groups of occupations and sport specific occupations are listed under ISCO3 Technicians and associate professionals and more precisely under the sub-group ISCO 342 Sport and Fitness Workers (3421 - Athletes and Sports Players; 3422 - Sports Coaches, Instructors and Officials; 3423 - Fitness and Recreation Instructors and Programme Leaders)

<sup>&</sup>lt;sup>4</sup> NACE - "Statistical classification of economic activities in the European Community". NACE is a basically a four-digit classification providing the framework for collecting and presenting a large range of reliable and comparable statistical data according to economic activity. The codes under NACE 93.1 (Sport activities) define the organisations whose main business is the provision of sport (93.11 Operation of sports facilities; 93.12 Activities of sport clubs; 93.13 Fitness facilities; 93.19 Other sports activities).

#### **CONCLUSIONS AND RECOMMENDATIONS**

Once all of the employment and skills data had been gathered from sources of labour market statistics and the Employer Skills Survey conducted, the aim was then to discuss and consult on the data with relevant stakeholders at all levels. A summary report on consultation activities carried out through the duration of the project is presented in Section 8.

Finally, it was the aim of the ESSA-Sport project to present findings and conclusions from the entire project and all activities including desk research, data collection and consultation.

The development of concrete recommendations and priority actions for the sector to tackle the identified challenges will ensure the legacy of the ESSA-Sport project as the sector builds on the data collected for sustained reforms to improve skills of paid staff and volunteers and meet the potential of the sport and physical activity sector. European-level conclusions and recommendations/ actions have been developed through a series of consultations and analysis of the findings from the project, and are presented in Sections 9 and 10 of this report.

These sections provide the basis for future actions and initiatives to reform and modernise training and qualifications and re-skill the workforce in a sport and physical activity sector that has potential to make a significant economic, health and social impact across Europe. ESSA-Sport should be seen as the first step of a long and challenging journey and the goal of the project was also to put the topic of skills development as high as possible in the policy agenda and at the heart of the sector development at both national and European level.





#### 2.1 THE EUROPEAN UNION

The European Union (EU) is a unique economic and political union that together cover much of the continent of Europe.

There are 28 m	nember countries of the European Union. They can be listed by year of entry¹:
01/01/1958	Belgium - France - Germany - Italy - Luxembourg - Netherlands
01/01/1973	Denmark - Ireland - United Kingdom
01/01/1981	Greece
01/01/1986	Portugal - Spain
01/01/1995	Austria - Finland - Sweden
01/05/2004	Cyprus - Czech Republic - Estonia - Hungary - Latvia - Lithuania - Malta - Poland - Slovakia - Slovenia
01/01/2007	Bulgaria - Romania
01/07/2013	© Croatia

The European Union covers over 4 million square kilometres. By surface area, France is the biggest country in the European Union followed by Spain and Sweden. Malta is the smallest in terms of surface area followed by Luxembourg and Cyprus.

The population of the EU is 513 million inhabitants. Europe's population is increasing through a combination of natural growth (more people are born each year than die) and net migration (more people settle in the EU than leave it). At the same time, the population of Europe is ageing as life expectancy increases and fewer children are born. The most populous country is Germany (83 019 213), followed by France (67 028 048) and the United Kingdom (66 647 112). The least populous country is Malta (493 559), followed by Luxembourg (613 894) and Cyprus (875 898)<sup>2</sup>. 51% of the EU population is female, 262 million, and 49% is male, 251 million<sup>3</sup>.

In January 2018, young people (under 15 years old) made up 15.6% of the EUs population, while persons considered to be of working age (from 15 to 64 years old) accounted for 64.7% of the population. Older persons (aged 65 or over) had a 19.7% share (an increase of 0.3 percentage points compared with the previous year and an increase of 2.6 percentage points compared with 10 years earlier).

<sup>&</sup>lt;sup>1</sup> The 28 member countries of the EU, see https://europa.eu/european-union/about-eu/countries\_en#tab-0-1

<sup>&</sup>lt;sup>2</sup> Size and population of the EU, see https://europa.eu/european-union/about-eu/figures/living\_en

<sup>&</sup>lt;sup>3</sup> Share of women in the EU population, see https://ec.europa.eu/eurostat/statistics-explained/index.php/Gender\_statistics#Education

Across the EU Member States, the highest proportion of young people in the total population in 2018 was observed in Ireland (20.8%), while the lowest were recorded in Italy (13.4%) and in Germany (13.5%). Regarding the proportion of persons aged 65 or older in the total population, Italy (22.6%) and Greece (21.8%) had the highest, while Ireland had the lowest (13.8%)<sup>4</sup>.

The impact of demographic ageing within the EU is likely to be of major significance in the coming decades. Consistently, low birth rates and higher life expectancy are transforming the shape of the EU's age pyramid; probably the most important change will be the marked transition towards a much older population structure, a development which is already apparent in several EU Member States.

As a result, the proportion of people of working age in the EU is decreasing while the relative number of those retired is expanding. The share of older persons in the total population in the European Union will increase significantly in the coming decades, as a greater proportion of the post-war baby-boom generation reaches retirement. This will, in turn, lead to an increased burden on those of working age to provide for the social expenditure required by the ageing population for a range of related services.

The EU launched a single European currency in 1999: the euro. The euro (€) is the official currency of 19 out of 28 EU countries. These countries are collectively known as the Eurozone. More than 340 million EU citizens in 19 countries now use it as their currency.

In terms of the total value of all goods and services produced (GDP) for the European Union, in 2017 it was €15.3 trillion<sup>5</sup>.

The EU is the largest trade block in the world. It is the world's biggest exporter of manufactured goods and services, and the biggest import market for over 100 countries. Free trade among its members was one of the EU's founding principles. This is possible thanks to the single market - the single market refers to the EU as one territory without any internal borders or other regulatory obstacles to the free movement of goods and services. A functioning single market stimulates competition and trade, improves efficiency, raises quality, and helps cut prices<sup>6</sup>.

Due to the abolition of border controls between EU countries, people can travel freely throughout most of the continent. And it has become much easier to live, work and travel abroad in Europe. Indeed, all EU citizens have the right and freedom to choose in which EU country they want to study, work, live or retire. Every EU country must treat EU citizens in exactly the same way as its own citizens for employment, social security and tax purposes.

The EU's main economic engine is the single market. It enables most goods, services, money and people to move freely. The EU aims to develop this huge resource to other areas like energy, knowledge and capital markets to ensure that Europeans can draw the maximum benefit from it<sup>7</sup>.



#### 2.2 THE EUROPEAN COMMISSION

The European Commission promotes the general interest of the EU by proposing and enforcing legislation as well as by implementing policies and the EU budget. It is the EU's politically independent executive arm. It is alone responsible for drawing up proposals for new European legislation, and it implements the decisions of the European Parliament and the Council of the EU<sup>8</sup>.

The Commission's Directorate General for Education and Culture (DG EAC) is the executive branch of the European Union responsible for policy on education, culture, youth, languages, and sport.

#### 2.3 CHARACTERISTICS OF THE OVERALL LABOUR MARKET

#### Employment statistics - The economically active population (labour force)9

Labour market statistics are at the heart of many EU policies. EU employment statistics are gathered and presented by Eurostat<sup>10</sup> which is the statistical office of the European Union. EU employment statistics are based on the EU Labour Force Survey (LFS).

In 2018, the EU employment rate for persons aged 20 to 64, as measured by the EU labour force survey (EU LFS), stood at 73.1%, the highest annual average ever recorded for the EU. Behind this average, large differences between countries can nevertheless be found. Sweden is the only EU Member State with an employment rate of over 80% (82.6%). At the other end of the scale, the employment rate was far from the EU target, i.e. below 70%, in Romania, Belgium, Spain, Croatia and Italy, with Greece recording the lowest rate (59.5%). In all EU Member States, the employment rate for men was higher than for women in 2018.

The employment rate of persons aged 25-64 who had completed a tertiary education (short-cycle tertiary, bachelor's, master's or doctoral levels (or equivalents)) (ISCED<sup>11</sup> levels 5-8) was 85.8% at EU level in 2018. This is much higher than the rate for those who have only attained a primary or lower secondary education (ISCED levels 0-2), i.e. 56.8%.

In terms of occupation, professionals represented the largest group in the EU in 2018 with 20.0% of employed persons. This was followed by service and sales workers with 16.4%, and then technicians and associate professionals with 16.3%. At the other end of the scale, the two smallest groups were skilled agricultural, forestry and fishery workers (3.0%) and armed forces occupations (0.6%).

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<sup>&</sup>lt;sup>4</sup> The share of elderly people in EU, Eurostat, see:

 $https://ec.europa.eu/eurostat/statistics-explained/index.php/Population\_structure\_and\_ageing\#The\_share\_of\_elderly\_people\_continues\_to\_increase$ 

<sup>&</sup>lt;sup>5</sup> The EU economy, see https://europa.eu/european-union/about-eu/figures/economy\_en

<sup>&</sup>lt;sup>6-7</sup> Goals and values of the EU, see https://europa.eu/european-union/about-eu/eu-in-brief\_en

 $<sup>{}^8\,\</sup>text{The European Commission, see https://europa.eu/european-union/about-eu/institutions-bodies/european-commission\_en}$ 

<sup>&</sup>lt;sup>9</sup> Employment statistics for the EU, see:

https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Employment\_statistics#Employment\_rates\_by\_sex.2C\_age\_and\_educational\_attainment\_level <sup>10</sup> Eurostat. the statistical office of the EU, see https://ec.europa.eu/eurostat/home

<sup>11</sup> ISCED - International Standard Classification of Education, see https://ilostat.ilo.org/resources/methods/classification-education/

The proportion of the EU workforce, in the age group 20-64 years, reporting that their main job was part-time increased slowly but steadily from 14.9% in 2002 to 19.0% in 2015, and then fell marginally to 18.5% in 2018. By far the highest proportion of part-time workers in 2018 was found in the Netherlands (46.8%), followed by Austria, Germany, Belgium, the United Kingdom, Sweden and Denmark where part-time work accounted in each case for more than a fifth (21%) of those in employment. By contrast, part-time employment was relatively uncommon in Bulgaria (1.8% of those in employment) as well as in Hungary, Slovakia, Croatia and Poland (between 4.2% and 6.2%). Part-time work increased since 2002 in all EU Member States, except for Romania (-3.1 percentage points ), Poland (-2.7 p.p.), Lithuania (-2.6 p.p.), Latvia (-1.7 p.p.), Croatia (-1.6 p.p.), Bulgaria (-0.9 p.p.) and Portugal (-0.6 p.p.). 30.8% of the employed women aged 20-64 in the EU worked on a part-time basis in 2018 compared with 8.0% for men.

From 2002 to 2018, the share of persons with a permanent working contract slightly decreased in the EU, while the share of temporary employees rose from 11.2% in 2002 to 13.2% in 2018. The number of persons temporarily employed varies among EU Member States: the highest percentage of persons having a temporary contract was recorded in 2018 in Spain (26.4%), Poland (23.9%) and Portugal (21.5%). At the other end, the lowest shares of temporary contracts can be found in Romania (1.1%), Lithuania (1.4%) and Latvia (2.6%).

**Note:** The economically active population (labour force) comprises employed and unemployed persons. The EU Labour Force Survey (LFS) defines persons in employment as those aged 15 and over, who, during the reference week, performed some work, even for just one hour per week, for pay, profit or family gain. The labour force also includes people who were not at work but had a job or business from which they were temporarily absent, for example, because of illness, holidays, industrial disputes, education or training.

#### Unemployment<sup>12</sup>

Eurostat estimates that 15.635 million men and women in the EU were unemployed in September 2019. Compared with August 2019, the number of persons unemployed increased by 48 000 in the EU. Compared with September 2018, unemployment fell by 889 000 in the EU.

The EU unemployment at 6.3% in September 2019 is the lowest since the start of the publication of EU monthly unemployment rate series in January 2000.

Among the EU Member States, the lowest unemployment rates in September 2019 were recorded in Czech Republic (2.1%) and Germany (3.1%). The highest unemployment rates were observed in Greece (16.9% in July 2019) and Spain (14.2%).

Youth unemployment rates are generally much higher, even double or more than double, than unemployment rates for all ages. In September 2019, 3.223 million young persons (under 25) were unemployed in the EU.

Moreover, 16.5% of the 20-34 olds in the EU in 2018 were neither in employment nor in education and training ('NEETs'). The proportion of young people neither in employment nor in education and training in 2018 ranged from 8% in Sweden to 28.9% in Italy<sup>13</sup>.

 $<sup>^{12}\</sup> Unemployment\ statistics\ in\ the\ EU,\ see\ https://ec.europa.eu/eurostat/statistics-explained/index.php/Unemployment\_statistics\#Recent\_developments$ 

<sup>&</sup>lt;sup>13</sup> Statistics on young people neither in employment nor in education or training, Eurostat, see https://ec.europa.eu/eurostat/statistics-explained/index.php/ Statistics\_on\_young\_people\_neither\_in\_employment\_nor\_in\_education\_or\_training

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# THE EUROPEAN SPORT AND PHYSICAL ACTIVITY SECTOR

#### 3.1 THE SPORT AND PHYSICAL ACTIVITY SECTOR AT THE EUROPEAN LEVEL

#### 3.1.1 Sport in the European Union

The European Union is involved in sport via the European Commission which develops and shares ideas across the EU, assisting in the implementation of programmes at a regional and local level. The Erasmus+ Sport programme, for instance, is a financial tool that helps develop the European dimension of sport, boosting cooperation between sports organisations, public authorities and other parties.

It is worth looking at the recent history of the involvement of the EU in sport1.

In 2007, the White Paper on Sport<sup>2</sup> was issued by the European Commission as the first policy document addressing sport on behalf of the European Union. The Lisbon Treaty, in force since December 2009, introduced a specific article which gave the EU a new supporting competence for sport. This article entails provisions for promoting European sporting issues and calls for EU action to develop the European dimension in sport.

In 2011, the Commission adopted a Communication entitled "Developing the European Dimension in Sport» providing for specific actions regarding the societal role of sport, the economic dimension of sport and the organisation of sport. Based on this Communication, the Council adopted a Resolution on an EU Work Plan for Sport 2011-2014, which further strengthened European cooperation on sport by setting priorities for EU-level work engaging the EU Member States and the Commission.

Following a proposal from the Commission, financial support for sport is now included in the form of a specific chapter in Erasmus+, the EU programme for education, training, youth and sport for the period 2014-2020.

A new EU Work Plan for Sport came into force in July 2017<sup>4</sup>. It sets out the key topics that EU Member States and the Commission should prioritise up to 2020:

- Integrity of sport will focus on good governance, safeguarding minors, fighting match-fixing, doping and corruption
- The economic dimension, focusing on innovation in sport, and the links between sport and the digital single market
- Sport and society, focusing on social inclusion, coaches, media, environment, health, education and sport diplomacy

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 $<sup>^1\,</sup>As\ described\ in\ https://ec.europa.eu/sport/news/2018/new-eurobarometer-sport-and-physical-activity\_en$ 

<sup>&</sup>lt;sup>2</sup> European White Paper on Sport (2007), see https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52007DC0391

<sup>&</sup>lt;sup>3</sup> Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on developing the European dimension in sport, see https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52011DC0012

<sup>&</sup>lt;sup>4</sup> EU Work Plan for Sport 2017-2020, see http://data.consilium.europa.eu/doc/document/ST-9639-2017-INIT/en/pdf

The European Commission's Directorate General for Education and Culture (DG EAC) supports many high-level and grassroots initiatives whose aim is to promote interaction between regional and local organisations — and therefore assist European citizens to become more involved<sup>5</sup>:

- The European Week of Sport is one of the premiere initiatives in this field and allows sport organisations, enterprises and experts from across the EU to develop their strategies for increasing participation in sport-related activities, and for participants to celebrate sport in their communities. The Week culminates in the presentation of the #BeActive awards.
- The EU sport forum acknowledges the need for broad, policy-based approaches to ensuring sporting events continue to respond to developing economic and cultural challenges and seeks to build a future in sport through high-level dialogue between sport leaders, entrepreneurs and other sport professionals.
- The Belnclusive Sport Awards recognise organisations using the power of sport to increase social inclusion for disadvantaged groups.

The Sport Chapter in the Erasmus+ programme aims to support European partnerships on grassroots sport in order to pursue the following objectives<sup>6</sup>:

- Tackle cross-border threats to the integrity of sport, such as doping, match fixing and violence, as well as all kinds of intolerance and discrimination
- To promote and support good governance in sport and dual careers of athletes
- To promote voluntary activities in sport, together with social inclusion, equal opportunities and awareness of the importance of health-enhancing physical activity, through increased participation in, and equal access to sport for all.

In relation to skills development, "Promote education in and through sport with special focus on skills development" is now a priority area within the Erasmus+ Sport funding programme.

#### 3.1.2 Sport participation in the European Union

Special Eurobarometer 472<sup>7</sup> is a public opinion survey on sport and physical activity in the 28 EU Member States. It contributes to providing data to highlight realities and tendencies around sport participation, and also to support the developing policy framework for promoting sport and physical activity.

The survey was carried out by TNS Political & Social network in the 28 EU Member States between 2 and 11 December 2017. Some 28,031 EU citizens from different social and demographic categories were interviewed face-to-face at home and in their native language, on behalf of the Directorate General for Education and Culture (DG EAC).

The main findings of Special Eurbarometer 472 can give a snapshot of sport participation across the European Union.

<sup>&</sup>lt;sup>5</sup> About sport in the EU, see https://ec.europa.eu/sport/about\_en

 $<sup>^{\</sup>rm 6}$  Erasmus+ Sport chapter, see https://eacea.ec.europa.eu/erasmus-plus/actions/sport\_en

<sup>&</sup>lt;sup>7</sup> Special Eurobarometer 472 on "Sport and Physical Activity", European Union (December 2017), see https://ec.europa.eu/sport/news/2018/new-eurobarometer-sport-and-physical-activity\_en

Nearly half of Europeans never exercise or play sport, and the proportion has increased gradually in recent years.

Further detail under this main finding reveals:

- Two in five Europeans (40%) exercise or play sport at least once a week, including 7% who do so regularly (at least five times per week). However, almost half of respondents (46%) never exercise or play sport.
- Levels of participation have not changed substantially since 2013. However, the proportion of those who never exercise or play sport has increased from 42% to 46%, and this is a continuation of a gradual trend since 2009.
- Less than half of respondents (44%) do some form of other physical activity (such as cycling, dancing or gardening) at least once a week, while 35% never do this kind of activity at all.
- Europeans are now less likely to engage in other physical activities than in 2013. In particular, the proportion that never does this type of activity has increased, from 30% to 35%.
- Overall, in the EU, men exercise, play sport or engage in other physical activity more than women. This disparity is particularly marked in the 15-24 age group, with young men tending to exercise or play sport on a regular basis considerably more than young women. The amount of regular activity that people do tends to decrease with age.
- Engagement in sport and physical activity is also less prevalent among people with lower levels of education and among those with financial difficulties.
- The proportion of people who exercise or play sport regularly or with some regularity is highest in Finland (69%), Sweden (67%) and Denmark (63%). Respondents are least likely to exercise or play sport in Bulgaria, Greece and Portugal (in each of these countries, 68% never exercise or play sport).
- There are several countries where respondents are now much less likely to engage in sport than in 2013: Croatia, Latvia, Austria and Estonia. Levels of engagement have increased in Malta, Bulgaria and Cyprus.



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Other key findings of Special Eurobarometer 472 include:

- In a given week, more than half of Europeans do not do any vigorous physical activity, and around half do not engage in moderate physical activity
- Formal sport settings are less popular than informal settings such as parks or outdoors, the home or the journey between home and work or school
- The main motivations for participation in sport or physical activity are improved health and fitness. Lack of time is the principal barrier
- Most Europeans think that there are opportunities available locally to be physically active, but many do not think their local authority does enough
- & 6% of respondents engage in voluntary work that supports sport activities

#### 3.1.3 Focus on the fitness sector

According to the global fitness association and partner in the ESSA-Sport project, the Health Racquet & Sportsclub Association (IHRSA), around 64.3 million people in Europe belonged to a health club or studio in 2018 and the fitness industry generated an estimated \$32.1 billion (€29 billion) in revenue at 63,955 facilities. The UK and Germany continue to lead all markets in Europe. In the UK, according to research by the Leisure Database Company, 9.9 million members belong to one of the nation's 7,038 health clubs and studios. Germany attracts more than 11 million members at 9,343 locations and generates \$6.3 billion (€5.7 billion) in annual revenue<sup>8</sup>.

IHRSA state in the same report that Europe has strong prospects for growth considering not only the mature, solid markets in Western Europe, but also the potential in Eastern European markets. The overall penetration rate in Europe was 7.8%.

Further data from IHRSA gathered through a 2018 European Chief Executive Officers Study, suggested that recruiting and retaining qualified staff would be the most significant competitive challenge over the next three years.

<sup>8</sup> The International Health, Racquet & Sports club Association (IHRSA), 2019 Global Report "The State of the Health Club Industry"



#### 3.2 ANALYSIS AND TRENDS AT THE NATIONAL LEVEL

One main output of the ESSA-Sport project is the production of national reports for each of the 28 countries in the EU, containing an analysis of labour market realities and challenges in the sport and physical activity sector. 19 of these were produced by dedicated project partners located in the country acting as national coordinators for the ESSA-Sport project.

The ESSA-Sport national reports discuss a range of topics under the heading of the sport and physical activity sector. For the purposes of the European Report, we will begin by showing the Ministry responsible for sport in each EU country. Following this will be a discussion of four main topics — national strategies, funding, link to other agendas, and participation — to draw some common themes from the national reports and speculate on the impact of these topics on skills and workforce issues.

#### 3.2.1 Ministry responsible for sport

All governments have an interest in sport. As can be seen below this can be for a variety of reasons from achieving health, economical, and society benefits to increasing national pride and prestige. Before looking at some of the themes in existing national strategies for sport, it is interesting to look at in which Ministry sport can be found in the countries of the EU.

21 out of the 28 EU countries have a Ministry with sport in the title. For most countries sport is part of a wider Ministerial portfolio. In some countries, such as Romania, Italy and Bulgaria, the Ministry is for Youth and Sport. Sport is often seen as part of culture and in some countries, such as Spain, Greece and Estonia, sport is part of the Ministry that relates to culture. In perhaps the largest number of countries, sport is part of the Ministry for Education — including in Portugal, Slovenia, Slovakia, Czech Republic, Lithuania, Croatia and Latvia. Other countries like Poland and Ireland put sport in the Ministry with tourism.

This analysis can give some clues to how much emphasis a government gives to sport, and which other major policy areas they see sport as being most connected to, whether this is culture, tourism, education, youth or some other area. The Ministerial home of sport in a nation can influence the national sport strategy, and as we will see, the sport strategy can influence the picture of employment and skills needs at the national level.

#### 3.2.2 National strategies for sport

When considering employment and skills in sport and physical activity, national strategies are important. Sport strategy set directly by government or by government backed and funded sport organisations can impact directly on the occupations and skills of the sport workforce of paid staff and volunteers, this is especially true if the strategy is supported by public sources of funding.

Analysis of available national sport strategies shows that governments seek to influence the sport sector in support of a range of policy aims. The most common of these are related to:

- Mass participation in sport
- Achievement at elite level
- Developing the sport sector and sector organisations

Governments do not set out to achieve these aims for their own sake, they are always linked to broader agendas and political ambitions, including:

- ♦ Healthy society/ Health of the population
- Community cohesion and development
- Reducing inequality
- Economic benefits of sport
- Education in and through sport

- Increasing tourism
- Quality of life
- National prestige
- Employability
- Engaging disadvantaged groups

It is clear sport is an intensely political arena. The twin aims to increase participation in sport while at the same time seeking high level achievement at the international level permeate through many national sport strategies. This is not surprising given the political belief that they can both bring such benefits to a nation.

Some examples of this dual ambition related to participation and elite sport can be seen in the overarching aim of the national sport strategy in the following countries:



#### Bulgaria

The current National Strategy for Development of Physical Education and Sport in the Republic of Bulgaria 2012-2022 has been adopted by the National Assembly in November 2011. The main strategic aim of the document is the establishment of the physical education, sport, and social tourism as means to improve the health and physical abilities of the population, maximum involvement of the population in organised sport for all from different social groups, as well as elevating the sport prestige of the nation on global level.



#### Croatia

The recently published National Sports Program 2019 - 2026 main aims are: programs for creating conditions for playing sports in the educational system; programs for creating conditions for achieving the highest results of Croatian athletes in international competitions; programs for creating conditions for recreational sports in order to protect and improve the health of the citizens of the Republic of Croatia.



#### **United Kingdom**

In 2015 the UK Government published "Sporting Future, A new Strategy for an Active Nation which in the most part applies only to England except for inclusion of some matters reserved to the UK level. This strategy covers the role of central and local government and tackles the twin themes of increasing participation and maximising international and domestic sporting success.



#### Lithuania

National Sport Development Strategy 2011 - 2020. The strategic goal is "by creating the conditions for all social groups in Lithuania to participate in sports meet the important objectives of social cohesion, quality of life, public health and health promotion, better performance, leisure and employment as well as to develop the social background for high performance athletes training system".

A further example can be cited from Germany where the German government assigns great importance to sport in terms of social policy, especially in the areas of integration, education, health care, inclusion and international understanding, which is why sport is comprehensively supported.

Patterns of employment and skills needs in sport do not solely link to Government strategy, many other factors are at play, however, all sectors react to government policy, laws, regulation and distribution of public funding — and this will inevitably have some impact on employment and skills. For example new jobs may be created with public money to work in projects to achieve social change through sport.

#### 3.2.3 Laws relating to sport

As with sport strategy and policy, national laws relating to sport can have an impact on employment patterns and skills needs at the national level. A review of ESSA-Sport national reports shows varying levels of legal regulation of the sport sector. In some countries such as the Netherlands, there is no dedicated sports law while sport organisations and people working in the sector adhere to more generic laws of the country as a whole. EU member countries with a dedicated law for sport have a law covering various topics and levels of intervention in the sport sector.

Some national sports laws cover the regulation of sport professions; in some countries, coaching, for example, is a legally regulated profession, sometimes requiring university level education. One example of such is Bulgaria where Chapter nine of the Law for Physical Education and Sport deals with the Sport-Pedagogy Human Resources, where it is established that coaches must complete a major in the field of "Sport" or "Physical Education", or have been qualified in the professional field of "Sport" and have to be registered in the National Register of Sport-Pedagogy Specialists and are the only people that can be hired as coaches or provide sport services. A similar law and situation exists in a small number of other countries.

In some countries, sport is legally supported by specific tax laws. In Germany, sport is supported by tax reductions as far as non-profit organisations are concerned. In Malta, Income Tax Rate is reduced for athletes and players in some sports and this favourable rate of income tax is also applicable to coaches working on a part time basis.

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National sports law can also be used to specify aspects of responsibility and funding for sport, such as the differentiation between federal and municipal/ local involvement in sport. In Latvia for example, Article 7 of the Sports Law defines that Local governments shall finance sport, and are entitled to build and maintain sport facilities.

A final example can be given of the Act on Sport in Poland which covers a range of areas including operating principles of sports clubs and associations, powers of the Polish Olympic Committee, sport promotion by public authorities, professional qualifications in sport, and disputes resolution in sport.

Sport sector organisations must operate within the legal framework of their country and laws relating to sport will inevitably have some impact on employment, education and skills in the sector, for example in areas of professional regulation of qualifications.

#### 3.2.4 Role of main stakeholders

As can be seen above, all countries in Europe have a government Ministry with overall responsibility for sport. The sector is then served in each country by a wide range of organisations which span the public, non-profit and private spheres and fulfil a wide range of functions.

The existence and role of main stakeholders is specific to each country, however broad similarities and themes can be seen from an analysis of the ESSA-Sport national reports covering this topic.

Every country has a National Olympic Committee although the size, remit and functions of this organisation can differ from one country to the next, from a wide-ranging role across sport in a country like Italy, to a narrower role based around preparing and leading competitors at Olympic Games such as in the United Kingdom. There is also a varying role for National Paralympic Committees.

Most countries in Europe then have a number of publically funded bodies responsible for setting and implementing sport policy. This is often known as a national sports council or sport association. An example of an active sports council being involved in every aspect of sport in their country is Sport Malta. Some countries also have specialist publically funded bodies such as organisations that deal with anti-doping.

In many countries, local authorities or municipalities have a responsibility for sport, often written in to national law. They provide facilities and run programmes to increase sport participation, often as part of a remit to improve the health and wellbeing of citizens.

The main sport specific organisations responsible for the overall management and delivery of their sport are sport federations. These are affiliated to European and international federations and have a remit to organise national competitions, select teams for international competition, provide training and support and have responsibility for overall governance of the sport at the national level.

In every nation in Europe, the backbone of the sector is a network of sport clubs, most of which are volunteer-run and not-for-profit. Some countries have a larger number of multi-sport clubs where in other countries most clubs are sport-specific.

In each country there is a private sector involved in delivering sport and physical activity opportunities. This is particularly prevalent in some parts of the sector such as the fitness industry.

Many countries in Europe now have organisations promoting and representing specific parts of the sector, this can include school sport, university sport, disabled sport and women in sport.

Finally, national representative bodies exist in many countries for the fitness industry, or the outdoors industry, acting as a trade body and representing members from their sub-sector. Representative bodies can also exist for other groups such as coaches, sport officials and athletes.

#### 3.2.5 Funding of sport

Across Europe, sport is financed through a variety of public and private sources. All governments fund sport to some degree through public bodies. Funding will be targeted at specific parts of the sector in line with national strategy and policies. In Bulgaria for example, the main source of finances for the high-performance sport and sport for all comes from the National Budget and is distributed through the Ministry of Youth and Sport. Some governments fund a public body to distribute funds on its behalf, such as Sport England in the United Kingdom or NOC\*NSF in the Netherlands.

In the financing of Hungarian sport, the public, private and civil sphere triangle is disproportionate; it places dominance on the side of the state. This was reinforced in 2011 as unprecedented high amount of government funding was injected into Hungarian sport, the funding allocated to physical education, student and university sport has been raised by 25%. This investment by the state seeks a return from sport which is seen as an important contributor to increase the well-being and the health situation of the citizens and could also have positive effects on the economic development of the country.

Local authority funding of sport is also common across Europe as another distributor of public funds, in some cases this is mandated by national law. However, in some countries, such as the United Kingdom, local authority spending on sport has decreased as it is not anymore part of statutory provision and can be subject to the effects of an austerity agenda if that is pursued by the national government.

In many countries including Bulgaria, Sweden and the United Kingdom, part of the public financing of sport comes from lottery funding.

Sponsorship is another main source of income to sport, and finally it should not be forgotten the contribution of volunteers to the sport sector, which while not direct financing is worth billions of euros to the European sport sector and indeed sport would grind to a halt without volunteer input of time and effort to make sport happen in communities.



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#### 3.2.6 Economic impact of sport

EU sport policy is designed to maximise economic benefits from sport. The European Commission aims to identify the sector's potential, safeguard it and provide support through the sharing of best practices in areas like sport statistics, state aid or sustainable funding for grassroots sport.

#### **Sport Satellite Accounts<sup>9</sup>**

During the past decade, Sport Satellite Accounts (SSAs) have taken an increasingly significant role in developing a common framework for measuring the economic impact of sport. The EU Working Group on Sport & Economics has established a harmonised statistical definition known as the Vilnius Definition of Sport. The EU Conference on Sport Statistics then covered the statistical needs underpinning the development of sport as a new policy area, discussing the SSAs and a possible future sport monitoring function in the EU.

Within the Vilnius Definition of Sport there are two main definitions of sport:

- Narrow definition: statistical definition plus all goods and services which are needed to do sport. *e.g. football shoes, billiard tables, repair services*
- Broad definition: narrow definition plus all goods and services which use sport as an input. *e.g. sport related tourism, sport betting*

In 2005, sport-related gross value added (direct effects) amounted to 112.18 billion Euro according to the narrow definition and 173.86 billion Euro with respect to the broad definition. The direct effects of sport, combined with its multiplier (indirect and induced) effects, added up to 2.98% (294.36 billion Euro) of overall gross value added in the EU<sup>10</sup>.

Some of the national reports in the ESSA-Sport project have discussed the economic impact of sport at the national level, notably the reports from Hungary and Portugal.

According to the European Federation of Sporting Goods Retailers which through its Austrian affiliate VSSÖ is a member of the European Platform for Sport Innovation in Brussels (EPSI - www.epsi.eu), the turnover of the sporting goods sector in Europe amounts to 81 billion Euro. The sporting goods industry directly employs 700 000 people in the EU. 78% of the enterprises in the sporting goods sector in the EU are in the retail sale of sporting equipment. The retail industry is also the main contributor to the EU total turnover (63%) and to the value added (58%). The European Sporting Goods Market is expected to be valued at 180 billion Euro by 2024.

Austria has the highest per capita spending on sporting goods with over 300 euros. Half of Austria's revenue from tourism is sport-related. The largest shares of the import and export value of sporting goods can be attributed to footwear of apparel, followed by sports equipment such as skis and balls, footwear and bicycles.

<sup>9</sup> https://ec.europa.eu/sport/policy/economy/data\_ena

<sup>&</sup>lt;sup>10</sup> https://ec.europa.eu/assets/eac/sport/library/studies/study-contribution-spors-economic-growth-final-rpt.pdf

# 3.2.7 Link to other agendas like health or social policy

EOSE and its members have promoted sport as a major contributor to health, social and economic policy. This is discussed above in relation to sport strategies. From studying the ESSA-Sport national reports, a sample of examples can be given to illustrate the situation at the national level:



## Hungary

The Sport XXI National Sport Strategy sets the short and long-term strategies of every aspect of sport in Hungary. It regards sport as a tool for achieving the most important social objectives: health maintenance; upbringing; personality development; community building; social integration.



#### **Netherlands**

Sports and exercise is increasingly used as a means to achieve social objectives. The developments in the social domain strengthen this movement. Examples of social goals where exercise is used for are: Health, Participation, Self-reliance, Local entrepreneurship.



### **Portugal**

- The national program for the promotion of physical activity is considered a priority for the health program
- In the field of tourism, sport has a development role in four areas of the National Strategic Tourism Plan

# 3.2.8 Voluntary sector

European sport is based on volunteering, sport would not exist without it. It is therefore important to study volunteering in sport at the national and European level. Later in this report, the European Employer Skills Survey findings discuss skills needs of volunteers, the situation around the engagement of volunteers and the level of expectation that employers have for volunteers and paid staff to perform to the same level of competence. The ESSA-Sport national coordinators discussed volunteering in the national reports and some examples of the national situation can be given.

The national reports from some Eastern European nations discuss the absence of volunteering that was enforced in the Soviet era and the fact it has developed and grown since independence against that backdrop. Now, the most popular fields of voluntarism in Hungary are health provision, culture, and sport in the third position, showing an increasing interest in volunteering especially in sporting events and in sport clubs. In Lithuania, according to the Statistics of Sport (2017) more than 9 700 volunteers are serving in various sport organisations, mainly in sport clubs and sport federations, but there is a view that volunteering in Lithuania still is not widespread or widely accepted in society. This is in part due to negative perceptions entrenched in the Soviet era.

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In Ireland, on an annual basis, it is estimated that approximately 37.2 million volunteer hours are spent on sport related activities. The annual value of volunteering in sport ranges between a lower bound estimate of €322 million annually and an upper bound estimate of €582 million annually. This underscores the important role and value played by volunteering in Irish sport. In economic terms, volunteers act as an input (of labour) into the conduct of amateur community sport and elite professional sport. Without them, there would be fewer sports activities and / or they would be more expensive to produce. Volunteers, then, play a major role in sustaining the high level of sporting activity in Ireland, with all the associated health and social benefits.

The following is taken from the national report from Poland but could equally apply to most countries in Europe:

«Sports volunteering is a comprehensive area without which contemporary sport can be hardly imagined. The idea to devote one's time to others summarises the values inherent in sport. Sports volunteering builds positive social attitudes and contributes to the exchange of experience and skills that may be useful in future professional work. Sports volunteering is a phenomenon that changes dynamically. In Poland, its development was accelerated by the holding major sports events over the past years. It is now difficult to imagine a smooth organisation of such events, even local ones. without the cooperation of qualified volunteers.

The development of sports volunteering is characterised by quantitative as well as qualitative aspects. An organisation that uses services of volunteers should take care of improving their qualifications to prepare them for their roles. Nonformal education of volunteers must be an important element supporting sports volunteering.»

## 3.2.9 Sport facilities

The facilities at which sport and physical activity take place and who owns them can have an impact on employment and skills in the sector. The provision of sport facilities was discussed within the ESSA-Sport national reports and some examples of provision and ownership can be given.

In Bulgaria, the majority of sport facilities are owned by municipalities and are operated through concession deals or rented to local sport clubs to manage. Some larger municipalities have established commercial entities to control some of their sport facilities. There are also a number of privately-owned facilities, which mainly consist of fitness halls, swimming pools, football and tennis fields, which are rented to amateur teams and athletes for recreational sport. These however are only in the large cities where they could attract customers.

In Germany, according to the Sports Development Report for the year 2015, about 46% of the clubs said they owned their own sports facilities (including clubhouse). At the same time, 62% of the clubs (also) use communal sports facilities. These include school sports facilities. Almost half of these clubs pay royalties for use (Breuer & Feiler, 2017).

In Sweden, the majority of the sports facilities are run by the municipality. The clubs using them pay a smaller fee since using them since one of the financing system for the sector is through subsidised rental fees. On the other hand, it is the commercial part of the sector that either rent their venues or invest and build their own. In recent years, some of the major facilities of the municipalities have been sold and run by private companies, often with the municipality and local clubs as a rental guests.

In the Netherlands, during the last two decades, sport and physical activity facilities have been developing the Dutch sporting landscape into more commercial initiatives (fitness centres) and the usage of public areas for sport (boot camps, mountain bike routes). On average, The Netherlands has one sport facility per 835 residents, and has at least one facility between 800 meters and 1.6 kilometres from their homes. Sport and physical activity mainly takes place in multiple areas: gyms, football accommodations, tennis facilities, fitness accommodations and so called special accommodations.

Some countries have a national register of sport facilities. In Lithuania, the main categories of sport facilities, their distribution in the country and the form of ownership is possible to obtain. There more than 5 700 different types of the facilities, namely: stadiums (596), halls (1 619), basketball halls (1 285), volleyball hall (753), football pitches (658), etc. Sports facilities are owned by general education schools (3 694), local municipalities (321), VET providers (223), private companies (134).





# **4.1 OBJECTIVE**

The overall objective of this work carried out through ESSA-Sport was to collate available data and official statistics on the sport and physical activity labour market<sup>1</sup> in all individual European Union Member States and for the European Union as a whole.

In order to make an impact on the sector and allow it to unlock its recognised and growing potential to improve peoples' lives and have in impact on health, employment and the economy in Europe, it is necessary to have a precise idea of the size and characteristics of the current labour market, as well as information about evolutions and tendencies. This information has been missing for many years as the last attempt to formulate a European map of employment for the sector was during the Vocasport<sup>2</sup> initiative in 2004.

One of the aims of the ESSA-Sport project was to fill a knowledge gap by undertaking a series of research activities to properly identify the scale and scope of employment in the emerging and growing sport and physical activity sector.

# **4.2 WORKING METHODOLOGY**

The overall scope of the work through the ESSA-Sport project is the widest sport and physical activity sector defined by the Council of Europe (2001) as "all forms of physical activity which, through casual or organised participation, aim at expressing or improving physical fitness and mental well-being, forming social relationships or obtaining results in competition at all levels". In this section, where the term "sport sector" is used it has the meaning of the broad sector of "Sport and Physical Activity".

EOSE has entered into dialogue with the European statistics agency Eurostat to explore the possibility to gather and collate available and consistent data from the European-wide Labour Force Survey. At the same time, ESSA-Sport National Coordinators worked to establish a direct relationship with their National Statistics Office (NSO) to discover what information exists for the sport sector or can be specifically produced by the NSO to meet the project requirements.

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<sup>1</sup> For the purposes of this report, the term "sport labour market" means those working in a paid position in the sport and physical activity workforce

<sup>&</sup>lt;sup>2</sup> Vocasport, EOSE (2004) – "Vocational education and training in the field of sport in the European Union: situation, trends and outlook", see http://eose.eu/wp-content/uploads/2014/03/vocasport-Final-Report-English-Version.pdf

# **4.3 TARGETED STATISTICS (STATISTICAL DEFINITION)**

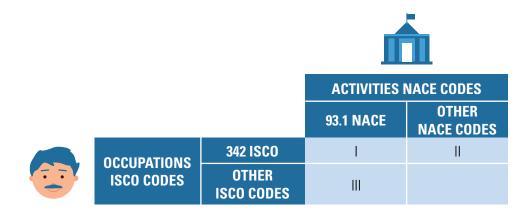
To summarise the overall process, the work carried out through the ESSA-Sport national desk research and in collaboration with Eurostat and National Statistics Offices (NSO) was to collate available data and statistics on the number of:

- Persons having a sport and fitness occupation (ISCO 342) in an organisation whose main business is the provision of sport (NACE 93.1), e.g. professional athletes, coaches, instructors
- Persons having a non-sport and fitness occupation (Other ISCO codes) in an organisation whose main business is the provision of sport (NACE 93.1), e.g. managers, receptionists
- Persons having a sport and fitness occupation (ISCO 342) in an organisation whose main business is not the provision of sport (Other NACE codes), e.g. a fitness instructor working in a hotel

The ambition was to collate such data but also to try to breakdown these statistics about the sport labour market by gender, age, level of education, type of employment (employed or self-employed) and type of working contract (full-time or part time).

In terms of the time period to which the data relates, statistics have been analysed from 2011 to 2018 in order to identify the evolution and tendencies of the sector in terms of employment.

The statistical definition used by the ESSA-Sport project for the collection of available statistics for the sport sector can be summarised as follows:



The goal of the consortium was to try to obtain statistics to identify the size and characteristics of:

- **Box I** = Total number of people having a sport and fitness occupation ISCO 342 within a sport organisation NACE 93.1
- **Box II** = Total number of people having a sport and fitness occupation ISCO 342 with an organisation whose main business is not the provision of sport
- Box III = Total number of people having a non-sport and fitness occupation within a sport organisation NACE 93.1

The addition of the 3 boxes I + II + III would then provide the total employment for the sport sector based on our statistical definition ( = the sport labour market).

# 4.4 NACE AND ISCO CLASSIFICATIONS

All registered organisations across Europe are classified under a NACE code. The goal of the desk research was to interrogate these codes to identify organisations whose main business is the provision of sport (NACE 93.1).

NACE is the "statistical classification of economic activities in the European Community" and is the subject of legislation at the European Union level, which imposes the use of the classification uniformly within all the EU Member States.

NACE is a four-digit classification<sup>3</sup> providing the framework for collecting and presenting a large range of reliable and comparable statistical data according to economic activity in the fields of economic statistics (e.g. production, employment and national accounts) and in other statistical domains developed within the European statistical system (ESS).

In terms of NACE codes for which data were targeted through the ESSA-Sport desk research, the goal was to search, collate and analyse all available statistics with a 4-digit breakdown as follows:

- 93: Sports activities and amusement and recreation activities (2 digits)
  - \$ 93.1 Sports activities (3 digits)
    - \$ 93.11 Operation of sports facilities (4 digits)
    - \$ 93.12 Activities of sport clubs
    - \$ 93.13 Fitness facilities
    - \$\oint{\oint}\$ 93.19 Other sports activities

The codes under 93.1 define the organisations whose main business is the provision of sport (NACE 93.1).

Once data had been collected on the number of persons working in a sport organisation (NACE 93.1), there was then a need to source data on the sport-related occupations that exist both under the NACE 93.1 codes but also within other organisations classified under other NACE codes from outside the sport sector.

In doing so, the partnership wanted to collect data and statistics on people having a sport and fitness occupation but employed in organisations with a broader role than just sport and whose main business is not the provision of sport e.g. local authorities, hotels, residential activity centres, universities and schools.

This was achieved through the cross-matching of ISCO-08<sup>4</sup> (occupational codes) with additional NACE codes (not just NACE code 93).

The International Standard Classification of Occupations (ISCO-08) was adopted through a resolution of a Tripartite Meeting of Experts on Labour Statistics held in December 2007. This resolution was subsequently endorsed by the Governing Body of the ILO (International Labour Organisation) in March 2008.

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<sup>&</sup>lt;sup>3</sup> NACE - "Statistical classification of economic activities in the European Community", see:

http://ec.europa.eu/eurostat/statistics-explained/index.php/Glossary:Statistical\_classification\_of\_economic\_activities\_in\_the\_European\_Community\_%28NACE%29 

4 ISCO – "International Standard Classification of Occupations", see:

http://www.ilo.org/wcmsp5/groups/public/@dgreports/@dcomm/@publ/documents/publication/wcms\_172572.pdf

	The ISCO-08 divides jobs into 10 major groups:									
ISCO 1	Managers									
ISCO 2	Professionals									
ISCO 3	Technicians and associate professionals  34 - Legal, Social, Cultural and Related Associate professionals (main heading)  342 - Sport and Fitness Workers (3 digits)  3421 - Athletes and Sports Players (4 digits)  3422 - Sports Coaches, Instructors and Officials  3423 - Fitness and Recreation Instructors and Programme Leaders									
ISCO 4	Clerical support workers									
ISCO 5	Service and sales workers									
ISCO 6	Skilled agricultural, forestry and fishery workers									
ISCO 7	Craft and related trades workers									
'E' ISCO 8	Plant and machine operators and assemblers									
ISCO 9	Elementary occupations									
<b>⊗</b> ISCO 0	Armed forces occupations									

Each major group is further organised into sub-major, minor and unit groups. The basic criteria used to define the system are the skill level and specialisation required to competently perform the tasks and duties of the occupations.

In the context of the ESSA-Sport project, the desk research involved the collation and analysis of existing data which has been collected from primary research and this section provides a summary of the main findings and available statistics for the sport sector in the European Union.

# 4.5 NOTE ON THE STATISTICS

It is important to state that what follows is the best information from available statistics about the sport labour market but should not necessary be seen as the exact reality of the sector. The ambition was to collate a maximum of available statistics from all EU Member States to be able to underline main findings and tendencies to help create discussions and debates with stakeholders on realities and challenges and lead to further dialogue with statistics agencies to support them to gather the most accurate data on the sport sector possible.

We have made the use of various sources such as Eurostat and National Statistics Offices (NSO) which means methodologies of collection might differ slightly in some cases and statistics should be considered carefully.

The collection of statistics has been a challenge in most of the EU Member States so to ensure consistency and the highest possible level of quality it was agreed with partners to use the following process for the analysis:

- Use Eurostat statistics when available as it gathers the most consistent source of statistics for the sport labour market in each of the 28 Member States
- When data from a National Statistics Office (NSO) was available, national coordinators were responsible to cross-check differences and sources, and confirm which data to be used
- When there was a significant difference, it was important for National Coordinators to ask the NSO the exact source to try to understand the reason for such difference

# 4.6 STRUCTURE OF THE PRESENTED DATA ON THE SPORT LABOUR MARKET

The next two sub-sections of the European Report (4.7 and 4.8) highlight the best possible estimation of the total employment in the sport sector (the European sport labour market 4.7) based on the ESSA-Sport statistical definition, and present the composition and characteristics of the total sport labour market (4.8).

In order to reach the ambitious goal of the ESSA-Sport project, it has been possible to identify the total number of people having a sport and fitness occupation (ISCO 342) within a sport organisation (NACE 93.1), and those having a sport and fitness occupation within an organisation whose main business is NOT the provision of sport (Other NACE codes).

This was the only condition to be able to obtain a total figure for the European sport labour market.

So, the next sub-section 4.9 focuses on the sport and fitness occupations defined as ISCO 342. Through this part, information is presented about the number of people having a sport and fitness occupation (ISCO 342). The ISCO category 342 includes all sport and fitness workers which means professional athletes and sport players, sport coaches, sport instructors, sport officials, fitness instructors, etc. On the summary chart, that corresponds to the boxes I and II.

# ACTIVITIES NACE CODES 93.1 NACE OTHER NACE CODES OCCUPATIONS ISCO CODES OTHER ISCO CODES

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Sub-section 10 focuses on employment of sport and fitness workers inside and outside sport organisations. The final sub-section 4.11 is about the persons involved in organisations whose main business is the provision of sport defined as NACE 93.1.

Through this final part can be found information about the size, evolution and characteristics of the workforce of organisations whose main business is the delivery of sport. That includes people having any type of occupation within a sport organisation (NACE 93.1) so working in a sport facility, a sport club, a fitness centre etc. These persons can have a sport-specific occupation (e.g. a coach) but also a non-specific sport occupation (e.g. manager).

On the summary chart, that corresponds to the boxes I and III.

### **SUMMARY CHART**



ACTIVITIES NACE CODES						
93.1 NACE	OTHER NACE CODES					
I	II					
III						



		93.1 NACE	NACE CODES
OCCUPATIONS —	342 ISCO		II
ISCO CODES	OTHER ISCO CODES	III	



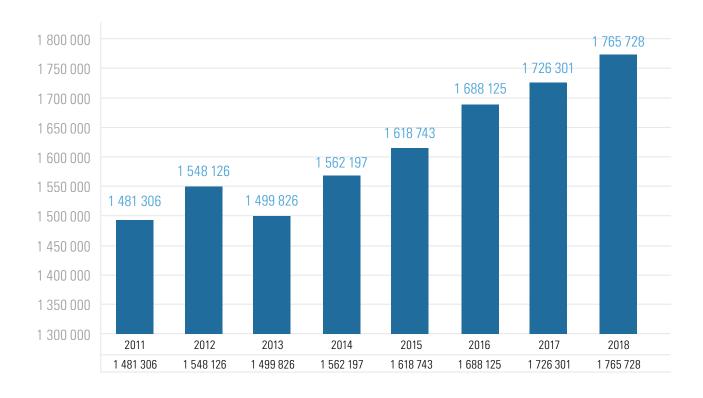
# 4.7 THE SPORT AND PHYSICAL ACTIVITY SECTOR AND ITS LABOUR MARKET

This sub-section summarises and highlights some of the main findings of the EU statistical research using Eurostat data (with some supplementation by NSO statistics) for the period 2011-2018.

## 4.7.1 The EU<sup>5</sup> sport labour market (= total sport employment)

Figure 1 reveals that the total number of people working in paid employment in the sport and physical activity sector in the EU in 2018 was 1 765 728. This is a rise from 1 481 306 in 2011 and represents a growth of 19.2% over the eight-year period. These totals do not include unpaid staff/volunteers.

Figure 1: EU sport labour market (= total sport employment)



It is important to mention that statistics collated by NSO and Eurostat might have been impacted by some changes of methodologies which applied on the Labour Force Survey (LFS) in 2012 with for example the update of the sampling frame and the weighting procedure.

This is not sure but these changes could provide an explanation to the sudden decrease of the total number of employees in the sport sector in 2013.

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<sup>&</sup>lt;sup>5</sup> Where the report refers to "EU" it means the EU-28 which is the 28 Member States of the European Union

Figure 2 shows the total sport sector workforce and also the breakdown of those staff working in sports activities organisations (NACE 93.1) and the sport and fitness workers (ISCO 342) employed in other types of organisation.

Figure 2: The EU sport labour market (total employment and by statistical codes)

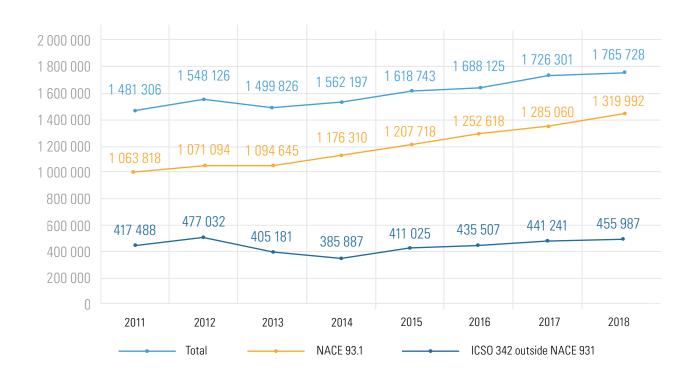
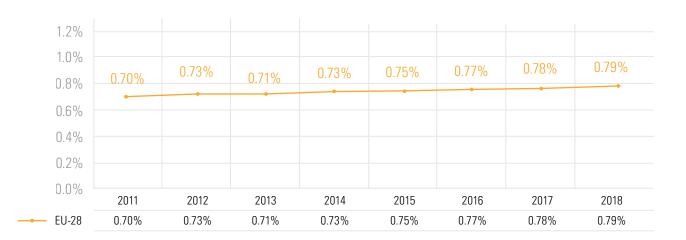




Figure 3 shows the sport labour market in the European Union as a percentage of the total EU employment (all sectors) for the period from 2011 to 2018.

Not only has the EU sport labour market increased in terms of number of employees, it has also steadily taken a greater share of overall employment in the EU by about 0.09% over the eight-year period.

Figure 3: Total EU sport labour market as a percentage of total EU labour market (all sectors)





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### 4.7.3 Size of the sport labour market by member country in 2018

Figure 4 shows the size of each EU nation's sport labour market in terms of number of employees. As previously mentioned, that includes the total number of people having a sport and fitness occupation in a sport organisation (e.g. a coach in a sport club), those having a non-sport and fitness occupation in a sport organisation (e.g. a receptionist in a sport federation), and those having a sport and fitness occupation in an organisation whose main business is not sport (e.g. a fitness instructor in a hotel).

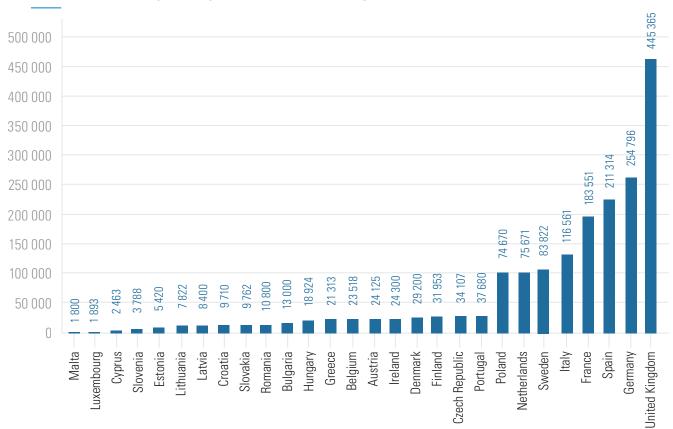


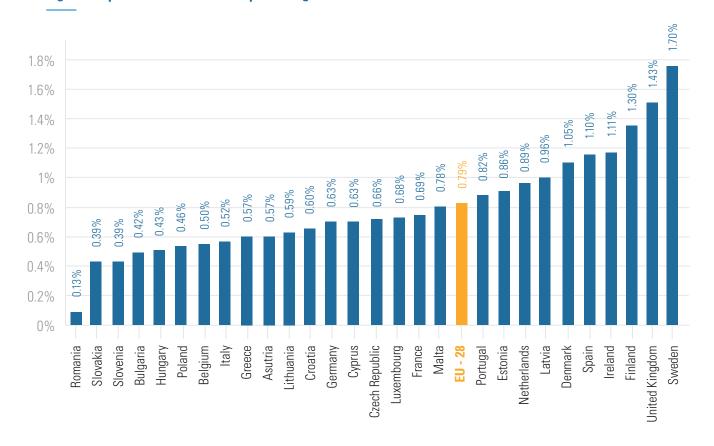
Figure 4: Number of sport and physical activity workers per EU nation

As it might be expected, the largest sport labour markets in Europe can be found in the most populous nations. Indeed, the top 4 countries in terms of the size of their sport labour market represent a total of 62% of the total sport employment in Europe in 2018. The United Kingdom represents 25.2%, Germany 14.4%, Spain 12% and France 10.4%.

However, as the next sub-section shows, there are variations in terms of the sport labour market as a percentage of each country's total employment (all sectors).

Figure 5 shows the wide variation in the share of each national sport labour market as a percentage of that country's total employment (all sectors) and the average for the EU as a whole for the year 2018. Thus, Sweden has the largest percentage of sport workers in its overall labour market (1.7%) and Romania has the smallest (0.13%). The average for all EU member countries is 0.79%.

Figure 5: Sport labour market as a percentage of each nation's total labour market





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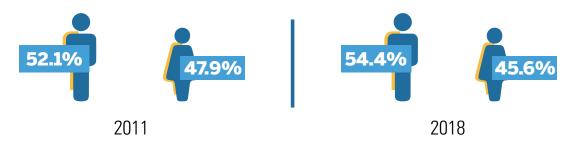
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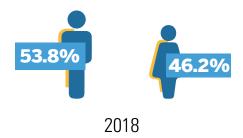
# 4.8 THE COMPOSITION OF THE EU SPORT LABOUR MARKET

# 4.8.1 EU sport labour market by gender

Figure 6 shows the percentage share of females and males in the total EU sport labour market from 2011 to 2018. In 2011, 47.9% of the sport labour market were female. By 2018, the percentage of females had declined to 45.6%. This is summarised in the graph below.



This compares with the overall EU workforce (all sectors):



Thus, the statistics underlined that the employment of females in the EU sport labour market is slightly below the average for all sectors.



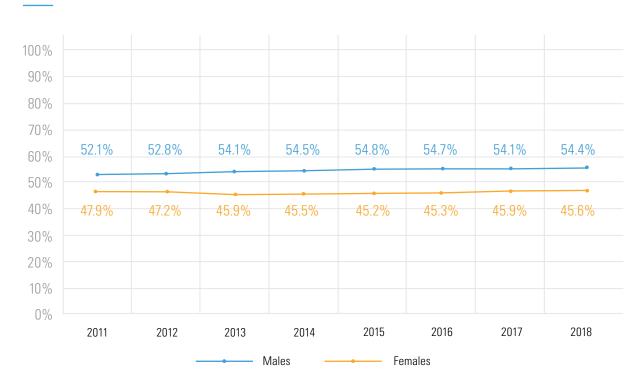
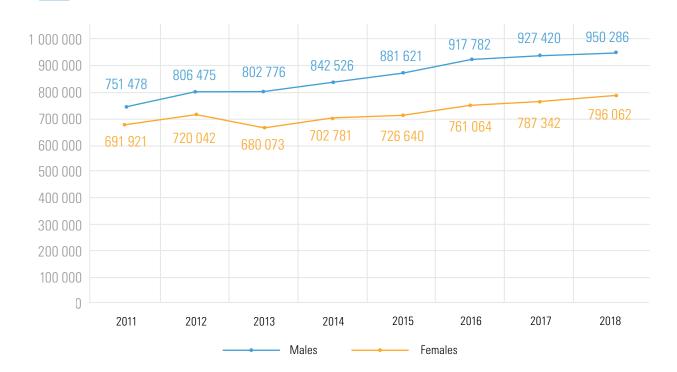


Figure 7: The numbers of males and females in the EU sport labour market

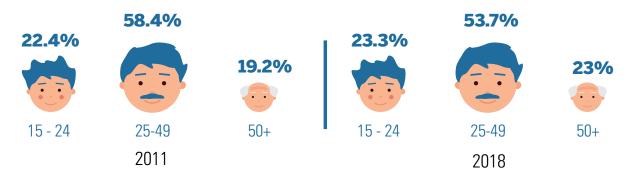


**Note:** For some countries the breakdown by gender was not available so the numbers which appear in the above figures on gender have been calculated from the following sample of the European Sport Labour Market:

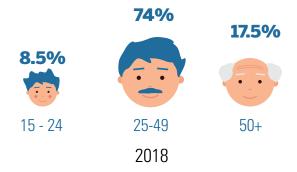
Year	2011	2012	2013	2014	2015	2016	2017	2018
Size of the sample (% of the European Sport Labour Market)	97.4%	98.6%	98.9%	98.9%	99.4%	99.5%	99.3%	98.9%

## 4.8.2 Total EU sport labour market by age

Figure 8 shows the percentage breakdown of the total EU sport labour market by age using three age bands. These are the age bands used by Eurostat. The majority of the workforce falls into the 25-49-age bracket but it is interesting to highlight that the percentages of young sport workers (15-24 years old) as well as workers over 50 have increased through the period from 2011 to 2018. This is summarised in the graph below.



This compares with the total EU workforce (all sectors):



Thus, another characteristic is that the sport and physical activity labour market has by far a larger representation of both the younger and older age groups by comparison with all sectors.

Figure 8: Total EU sport labour market; percentage by age band



Figure 9 shows the actual numbers employed in each age band.

Figure 9: The numbers of people in each age band in the EU sport labour market



Whereas numbers of sport workers in all age groups have grown, the trend over the last eight years has been for both the older and younger age groups to increase their shares of the overall labour market at the expense of the middle group.

The number of older (50+) and younger (15-24) workers is now almost equal. However, the sharpest growth rate is in the 50+ age group (42.6% up) by comparison with the workforce as a whole (19.2%) and the 15-24 age group (23.9%). Thus, the workforce is showing an aging tendency.

**Note:** For some countries the breakdown by age group was not available so the numbers which appear in the above figures have been calculated from the following sample of the European Sport Labour Market:

Year	2011	2012	2013	2014	2015	2016	2017	2018
Size of the sample (% of the European Sport Labour Market)	92.5%	92.6%	92.5%	92.3%	92.4%	92.1%	90.7%	92.3%

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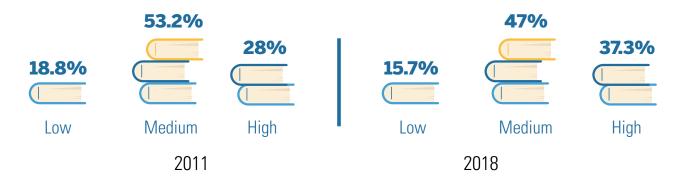
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## 4.8.3 Total EU sport labour market by level of education

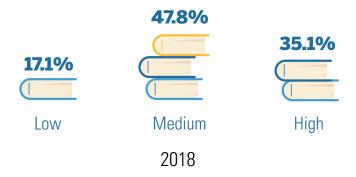
Figure 10 shows the sport labour market broken down by levels of education. The levels here are those taken from UNESCO's International Classification of Education (ISCED) which align fairly closely with the European Qualifications Framework (ΕQF).

	<b>ISCED 2011</b> (data from 2014 onwards)	<b>ISCED 1997</b> (data up to 2013)
Low education	Levels 0-2	Levels 0-2
Medium education	Levels 3-4	Levels 3-4
High education	Levels 5-8	Levels 5-6

The breakdown by education level in the sport labour market is summarised in the graph below.



This compares with the EU workforce as a whole (all sectors):



This suggests the sport labour market is slightly better educated than the EU workforce as a whole with more workers who have higher education achievement and fewer with low education.

From 2011 to 2018, the percentage of sport workers with low education has decreased whereas the percentage of those having a high education level has increased.

The largest proportion (47%) of those in the sport and physical activity workforce have a middle education level. However, the trend is in the direction of higher education levels (short cycle first tertiary education programmes up to doctoral level).

Figure 10: Total EU sport labour market; percentage by level of education



Figure 11 shows the numbers of sport workers employed over the eight-year period (2011 to 2018) by education level. The strongest growth has been amongst those with high education Levels. This group has grown by 64.4% over the eight-year period, whereas numbers in the other groups (medium and low) have remained relatively static and declined as a share of the workforce as a whole.

Figure 11: The numbers of people with each level of education in the EU sport labour market



It appears that the sport workforce is becoming more educated, but we do not know if the outcomes of their education are appropriate to the needs of the industry (evidence from the ESSA-Sport European Employer Skills Survey suggests not — see section 7) or if the growing number of higher education graduates may actually be overqualified for the roles they are undertaking.

**Note:** For some countries the breakdown by level of education was not available so the numbers which appear in the above figures have been calculated from the following sample of the European Sport Labour Market:

Year	2011	2012	2013	2014	2015	2016	2017	2018
Size of the sample (% of the European Sport Labour Market)	89.6%	89.8%	89.1%	89.8%	91.9%	91.0%	90.8%	92.7%

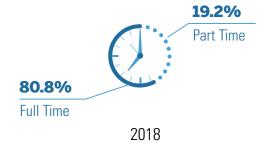


Figure 12 shows the percentage shares of full- and part-time working contracts in the total EU sport and physical activity labour market. It appears that most people are employed on full-time contracts, and there is very little change over the last eight years but there has been a slight tendency in favour of part-time working by about 1%. This is summarised in the graph below.



This compares with the EU total workforce (all sectors):

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Clearly, from the above figures, the sport and physical activity labour market favours part-time employment more than other industries by quite a wide margin.

Figure 12: Total EU sport labour market; percentage by type of working contract



Figure 13 shows the numbers of people employed on full- and part-time contracts through the period 2011-2018. The growth of full- and part-time contracts have tracked each other very closely over this period.

Figure 13: The numbers of people with each type of working contract in the EU sport labour market

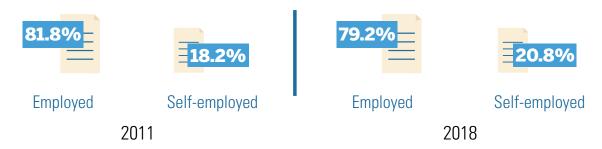


**Note:** For some countries the breakdown by type of contract (Full time / Part time) was not available so the numbers which appear in the above figures have been calculated from the following sample of the European Sport Labour Market:

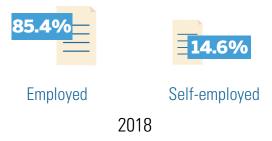
Year	2011	2012	2013	2014	2015	2016	2017	2018
Size of the sample (% of the European Sport Labour Market)	94.1%	95.3%	93.4%	93.6%	95.5%	95.2%	95.6%	94.8%



This part of the analysis looks at the breakdown between those who are employed (both full-time and part-time) and those who are self-employed. Figure 14 shows the percentages of employed and self-employed sport workers over the eight-year period. In 2018 nearly four fifths of the workforce had employed status, but this has declined by 2.6% over time. This is summarised in the graph below.



This compares with the EU workforce as a whole (all sectors):



Thus, the sport and physical activity labour market favours self-employment more than other industries, but this tendency is less than its preference for part-time contracts.

Figure 14: Total EU sport labour market; percentage by professional status

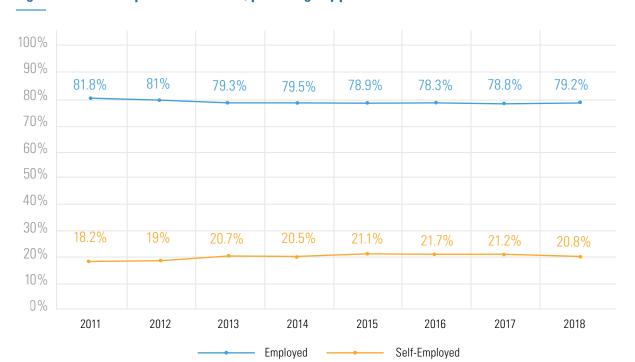
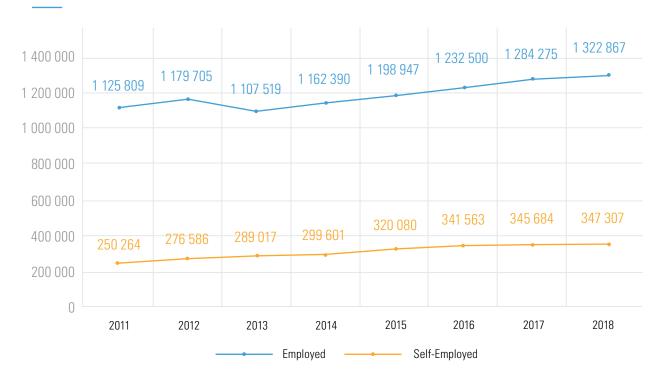


Figure 15 shows the numbers of people in the total sport and physical activity labour market according to employed or self-employed status. Whereas there has been little significant change in terms of percentage shares (Figure 14), there is a discernible trend in favour of self-employed working which has grown by 38.8% over the last eight years by comparison with employed status which has grown by only 17.5%.

Figure 15: The numbers of people with each type of professional status in the EU sport labour market



**Note:** For some countries the breakdown by professional status (employed / self-employed) was not available so the numbers which appear in the above figures have been calculated from the following sample of the European Sport Labour Market:

Year	2011	2012	2013	2014	2015	2016	2017	2018
Size of the sample (% of the European Sport Labour Market)	92.9%	94.1%	93.1%	93.6%	93.8%	93.2%	94.4%	94.6%



# 4.9 PEOPLE WORKING IN SPORT AND FITNESS OCCUPATIONS IN ALL TYPES OF ORGANISATION IN THE EU (SPORT AND NON-SPORT ORGANISATIONS) (ISCO 342)

This section uses Eurostat figures for the period 2011-2018 to estimate and break down the number of people working in sport and fitness occupations (classified as ISCO 342) in both sport and non-sport organisations.

This occupational group ISCO 342 comprises sport-specific occupations:

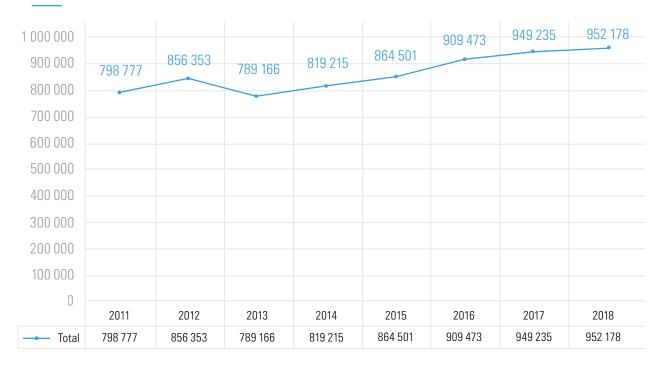
- 🕸 3421 Athletes and Sports Players
- 🕸 3422 Sports Coaches, Instructors and Officials
- 🕸 3423 Fitness and Recreation Instructors and Programme Leaders

It is important to note that the figures in this section are for staff working in all types of organisations: sports activities organisations and other types of organisation (for example, fitness staff in hotels). Unlike NACE 93.1, ISCO 342 does not include occupations such as cleaners, managers, receptionists, office staff and caterers etc.

# 4.9.1 Total number of people working in sport and fitness occupations in the EU and growth rate

Figure 16 shows the total working population in sport and fitness occupations (in sport and non-sport organisations) as of 2018 it is 952 178. This compares with a figure of 798 777 in 2011.

Figure 16: Total numbers of people working in sport and fitness occupations (ISCO 342)



Thus, there has been a growth during this period of 19.2% in terms of number of sport and fitness workers. This is identical to the growth rate presented in the last section in the total sport and physical activity labour market. With the exception of the 'spike' in 2012, which is not fully explained, there is evidence of a steady upward trend 2011-2018.

Figure 17 shows the percentages of males and females in this occupational group over the eight-year period. As in the case of the sport and physical activity overall labour market, those employed as sport and fitness workers are more likely to be male than female, and the gap has widened by 3.3% since 2011. This is summarised in the graph below.

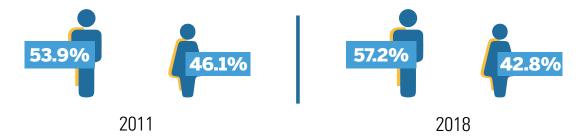
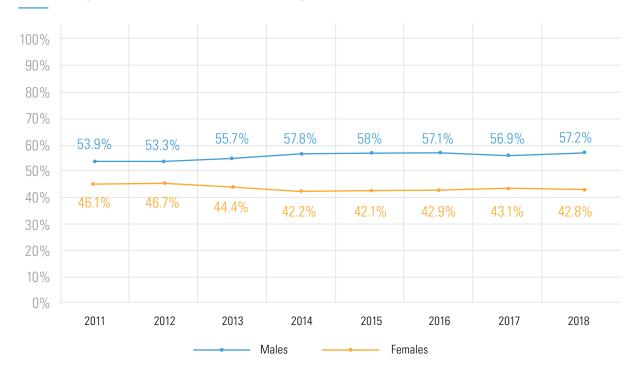


Figure 17: Sport and fitness workers (ISCO 342); percentage by gender





A

Figure 18 shows the numbers of sport and fitness workers in the EU by gender over the period from 2011 to 2018.

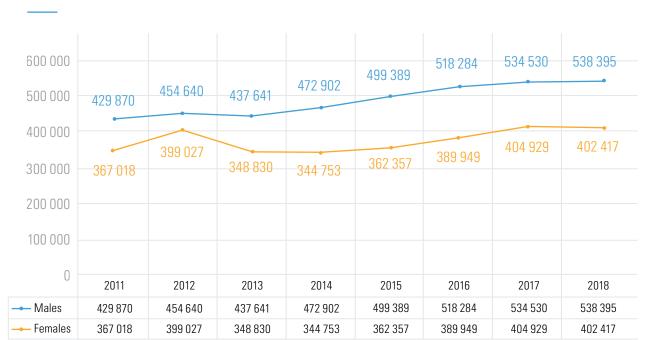


Figure 18: The numbers of males and females employed in sport and fitness occupations (ISCO 342)

The number of females joining the EU sport labour market has only grown by 9.64% by comparison with males (25.24%) as presented earlier in the report. The growth in the number of females joining sport and fitness occupations is lower than female growth in the sport labour market as a whole (15%). This suggests that whereas more women are joining the total sport workforce, many are going into the non-sports and fitness jobs perhaps as receptionists, clerical, management or marketing staff.

**Note:** For some countries the breakdown by gender was not available so the numbers which appear in the above figures have been calculated from the following sample of the total number of people having a sport-specific occupation (ISCO 342):

Year	2011	2012	2013	2014	2015	2016	2017	2018
Size of the sample (% of the total number of people having a sport and fitness occupation)	99.8%	99.7%	99.7%	99.8%	99.7%	99.9%	99.0%	98.8%

Figure 19 shows the breakdown of sport and fitness workers in the EU by age bands. These are the age bands used by Eurostat. The majority of sport and fitness workers fall into the 25-49-age bracket. This is summarised in the graph below.

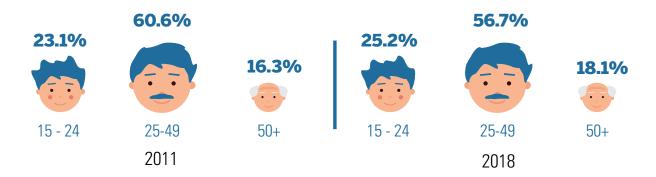


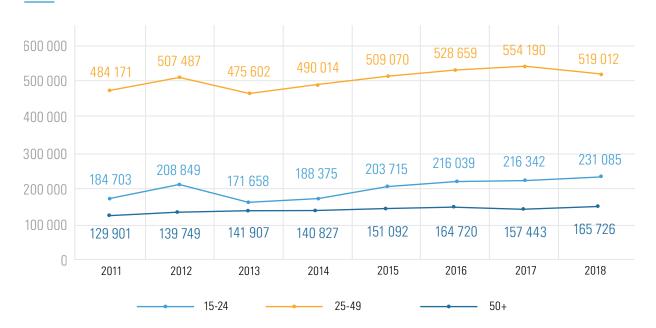
Figure 19: Sport and fitness workers (ISCO 342); percentage by age band



The trend over the last eight years has been for both the older and younger age groups to increase their shares of the overall sport-specific workforce at the expense of the middle group.

Figure 20 shows the numbers of people employed in sport and fitness occupations by age bands.

Figure 20: The numbers of people in each age band employed in sport and fitness occupations (ISCO 342)



The growth in the older age group (27.6%) is slightly greater than that for the younger group (25.1%) so there is a small tendency in the direction of an aging workforce.

**Note:** For some countries the breakdown by age group was not available so the numbers which appear in this figure have been calculated from the following sample of the total number of people having a sport-specific occupation (ISCO 342):

Year	2011	2012	2013	2014	2015	2016	2017	2018
Size of the sample (% of the total number of people having a sport and fitness occupation)	100%	100%	100%	94.8%	95.0%	95.8%	97.5%	96.2%



Figure 21 shows the percentages of sport and fitness workers by level of education. The levels here are those taken from UNESCO's International Classification of Education (ISCED) which align fairly closely with the levels used in the European Qualifications Framework (EQF).

	<b>ISCED 2011</b> (data from 2014 onwards)	<b>ISCED 1997</b> (data up to 2013)
Low education	Levels 0-2	Levels 0-2
Medium education	Levels 3-4	Levels 3-4
High education	Levels 5-8	Levels 5-6

From the collated statistics, it appears that the majority of sport and fitness workers have a middle education level, but the gap between this group and those with higher education qualifications is now very narrow in 2018 (0.8%). This is summarised in the graph below.



If we compare with the previous section of the report (4.8.3) on the EU total sport labour market, it can be said from the data that sport and fitness workers are more highly educated than the sport and physical activity workforce as a whole.

Figure 21: Sport and fitness workers (ISCO 342); percentage by level of education

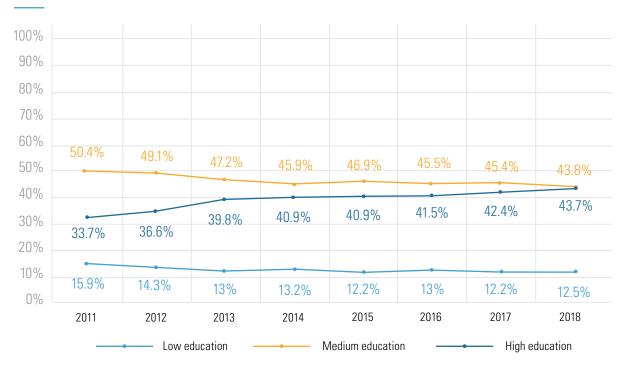
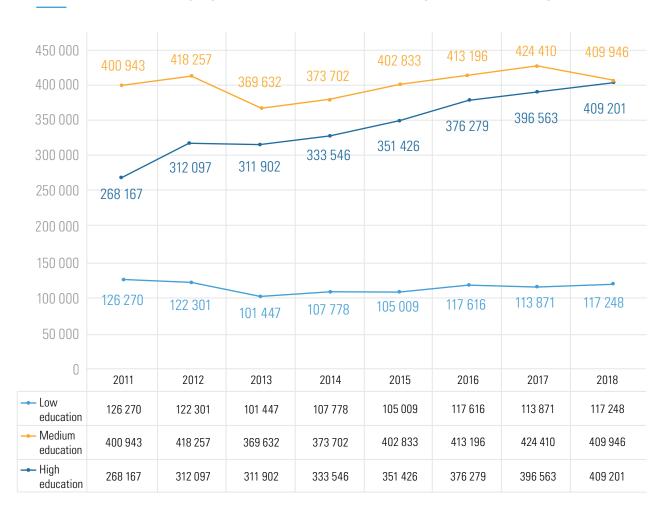


Figure 22 shows the numbers of sport and fitness workers in the EU by education Level.

Figure 22: The numbers of people with each level of education in sport and fitness occupations (ISCO 342)



As we have seen earlier with the EU sport labour market as a whole, the greatest growth from 2011 to 2018 has been in the high education group (52.59%) whereas the other two groups have remained relatively static. However, this growth in high education level is lower than that for the EU sport labour market as whole which stands at 64.35%.

**Note:** For some countries the breakdown by level of education was not available so the numbers which appear in this figure have been calculated from the following sample of the total number of people having a sport-specific occupation (ISCO 342):

Year	2011	2012	2013	2014	2015	2016	2017	2018
Size of the sample (% of the total number of people having a sport and fitness occupation)	99.6%	99.6%	99.2%	99.5%	99.4%	99.7%	98.5%	98.3%

Figure 23 shows the percentages of sport and fitness workers by full- and part-time contracts. Slightly more than half sport and fitness workers are employed on full-time contracts, but the gap in 2018 is now very narrow (0.4%). There has been a small trend in favour of part-time employment over the last eight years. Sport and fitness workers are more often working on a part time working contract compared to the sport and physical activity workforce as a whole.

This is summarised in the graph below.

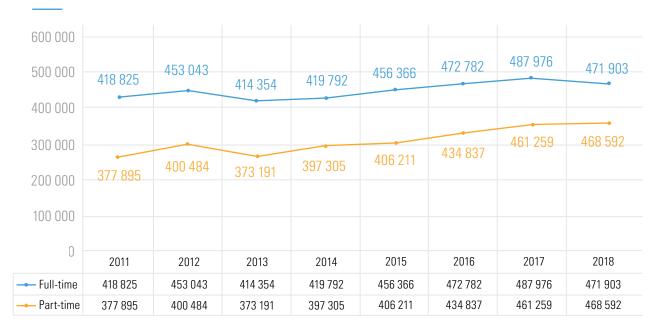


Figure 23: Sport and fitness workers (ISCO 342); percentage by type of working contract



Figure 24 shows the numbers of sport and fitness workers in the EU over the eight-year period by type of working contract.

Figure 24: The numbers of people with each type of working contract in sport and fitness occupations (ISCO 342)



The growth of part-time contracts has been almost double that of full-time contracts (24% for part-time compared to 12.7% for full-time).

**Note:** The numbers which appear in this figure representing the breakdown by type of contract have been calculated from the following sample of the total number of people having a sport-specific occupation in Europe (ISCO 342):

Year	2011	2012	2013	2014	2015	2016	2017	2018
Size of the sample (% of the total number of people having a sport and fitness occupation)	99.7%	99.7%	99.8%	99.7%	99.8%	99.8%	100%	99.8%

#### 4.9.6 Total number of people working in sport and fitness occupations in the EU by professional status

This part of the analysis looks at the breakdown between sport and fitness workers who have employed status (both full-time and part-time) and those who are self-employed.

Figure 25 shows the percentages of sport and fitness workers who have employed and self-employed status. More than two thirds of sport and fitness workers have employed status but that means that around 30% of them are working with self-employed status. This is higher by 9% compared to the percentages of self-employees engaged within the EU total sport labour market.

This is summarised in the graph below.

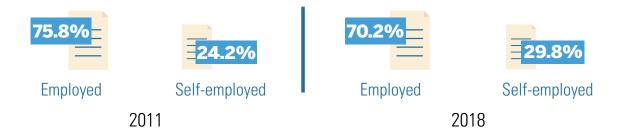


Figure 25: Sport and fitness workers (ISCO 342); percentage by professional status

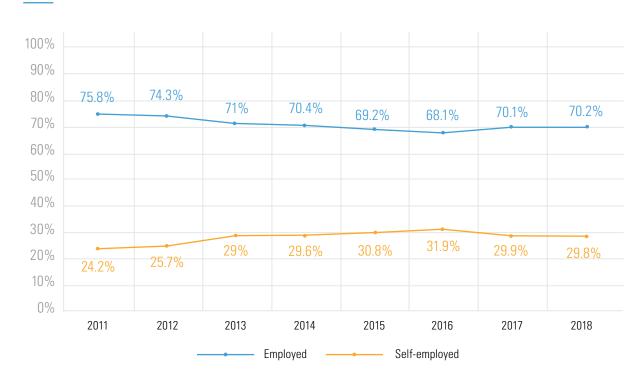
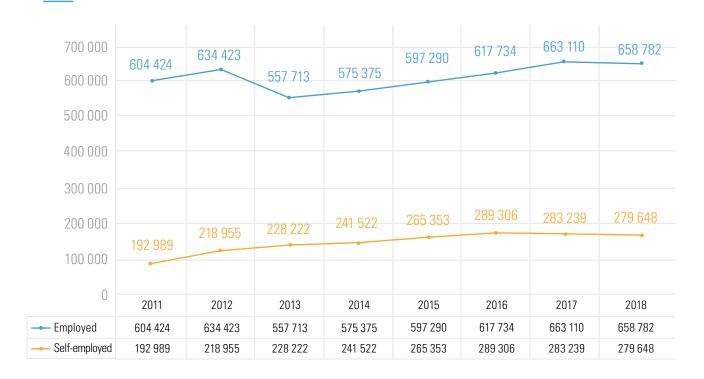


Figure 26 shows the numbers of sport and fitness workers in the EU by professional status (employed and self-employed).

Figure 26: The numbers of people with each type of professional status in sport and fitness occupations (ISCO 342)



Self-employment has in fact grown by 44.9% over that period by comparison with only 9% for employed status. Thus, there is noticeable trend towards self-employment for sport and fitness workers in the period 2011-2018.

**Note:** The numbers which appear in this figure concerning the breakdown by professional status have been calculated from the following sample of the total number of people having a sport-specific occupation in Europe (ISCO 342):

Year	2011	2012	2013	2014	2015	2016	2017	2018
Size of the sample (% of the total number of people having a sport and fitness occupation)	99.8%	99.7%	99.6%	99.7%	99.8%	99.7%	99.7%	99.6%

From the available official statistics, it has been possible to break down the overall figure for ISCO 342 (sport and fitness workers) into more specific occupations. Whereas, figures are not available for all countries, we can estimate numbers and percentages for the years 2011-2018 using a 75% sample.

Figure 27 shows the breakdown of sport and fitness workers into more specific occupational groups over the eight-year period. This is summarised in the table below.

2011		2018
6.6%	Athletes and Sports Players - ISCO 3421	6.9%
47.2%	Sports Coaches, Instructors and Officials ISCO 3422	<b>58.2</b> %
46.2%	Fitness and Recreation Instructors & Programme Leaders - ISCO 3423	34.9%



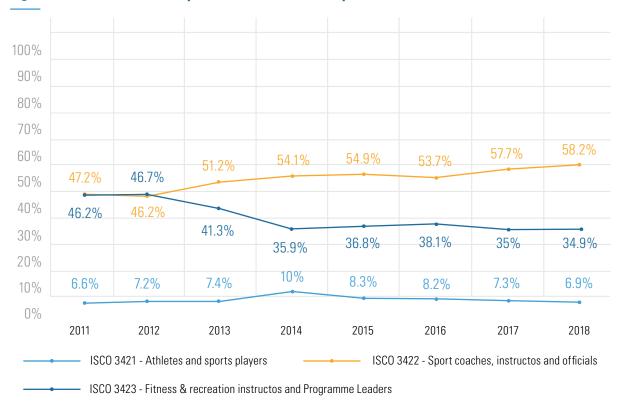


Figure 27: Breakdown of occupations within ISCO 342 (sport and fitness workers)

The percentage share of fitness and recreation instructors and programme leaders has declined (by 11.2%) whilst the share of sports coaches, instructors and officials has increased (by 10.5%) with a very small increase in the percentage of athletes and players.

However, it should be noted that from 2011 - 2018 all three occupations saw a growth in overall numbers, with the largest growth rate being seen for sports coaches, instructors and officials with +85.2% (ISCO 3422). The growth in numbers of athletes and sport players (ISCO 3421) was +6.9% and for fitness and recreation instructors and programme leaders (ISCO 3423) was +13.6%.

# 4.10 EMPLOYMENT OF SPORT AND FITNESS WORKERS INSIDE AND OUTSIDE SPORTS ORGANISATIONS

This section uses Eurostat figures for the period 2011-2018 to compare the number of people employed as sport and fitness workers (classified as ISCO 342) in both sport organisations (NACE 93.1) and non-sport organisations (those not classified under NACE 93.1). As before, this group comprises:

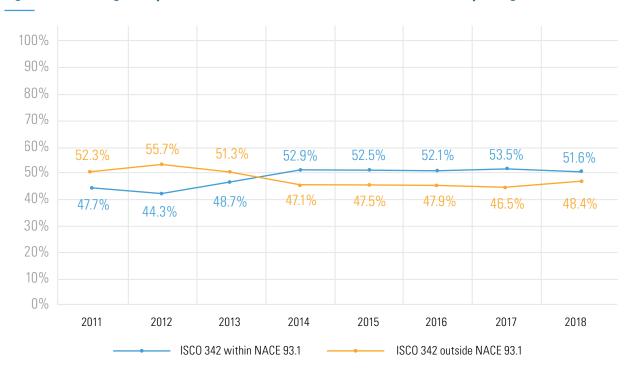
- Athletes and Sports Players
- Sports Coaches, Instructors and Officials
- Fitness and Recreation Instructors and Programme Leaders

It also shows which other sectors employed sport and fitness workers.

4.10.1 Comparing the employment of sport and fitness workers (ISCO 342) within sport organisations (NACE 93.1) with their employment by other organisational types

Figure 28 shows the distribution of sport and fitness workers in the EU between sport organisations and non-sport organisations.

Figure 28: Percentages of sport and fitness workers (ISCO 342) within or outside a sport organisation (NACE 93.1)



A small majority of sport and fitness workers are now employed in sports organisations (as opposed to 2011 when 52.3% were working in other types of organisations), but the gap is narrow. These figures are important as they underlined that 48.4% of people having a sport-specific occupation are working in an organisation whose main business is not the delivery of sport (non-sport organisations).

**Note:** This calculation has been made based on the statistics collated for 27 Member States. Romania is missing.

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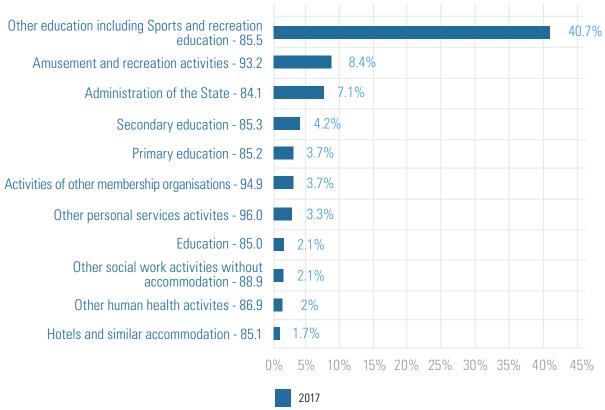
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Figure 29 below shows which types of non-sport organisations (other than NACE 93.1) employ sport and fitness workers in Europe, for the year 2017.

Figure 29: Sport and fitness workers (ISCO 342) in NACE codes other than 93.1



Of these, NACE 85.5 is the most significant. NACE 85.5 falls under NACE 85 Education and is described as 'Other Education'. Listed under this grouping are: Sports and Recreation Education; Cultural Education; and Driving School Activities. We can assume that the majority of sport and fitness workers are employed in 85.51: Sports and Recreation Education. This is described in the following way:

#### "85.51 Sports and Recreation Education:

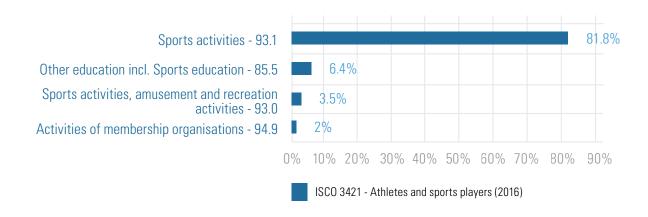
This class includes the provision of instruction in athletic activities to groups of individuals, such as by camps and schools. Overnight and day sports instruction camps are also included. It does not include academic schools, colleges and universities. Instruction may be provided in diverse settings, such as the unit's or client's training facilities, educational institutions or by other means. Instruction provided in this class is formally organised."

**Note:** The numbers presented in the figure above can be considered reliable as they are based on 90.2% of the total number of people having a sport and fitness occupation within an organisation whose main business is not the provision of sport in Europe.

It has been possible to go another step further and identify the main sectors of activities in which the three categories of sport and fitness occupations are employed, and from the available statistics this was possible only for the year 2016.

Figure 30 shows percentages of athletes and sport players (ISCO 3421) employed in different types of organisation by their NACE codes. From the available statistics, we have been able to highlight the top 4 types of organisations in which athletes and sport players are employed.

Figure 30: ISCO 3421 in NACE codes



The overwhelming majority of athletes and sport players are working in sport organisations classified within 93.1 (Sports Activities). From the available statistics, we have been able to highlight the top 4 types of organisations in which athletes and sport players are employed.

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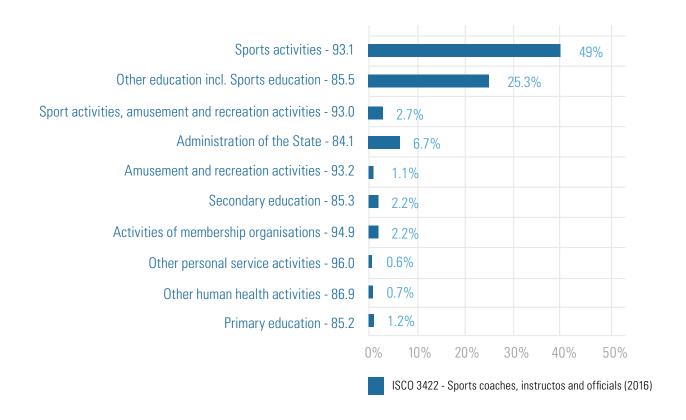
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#### 4.10.4 Employment of sports coaches, instructors and officials (2016)

Figure 31 shows which types of organisation employ coaches, instructors and officials (ISCO 3422). From the available statistics, we have been able to highlight the top 10 types of organisations in which sports coaches, instructors and officials are employed.

Figure 31: ISCO 3422 in NACE codes

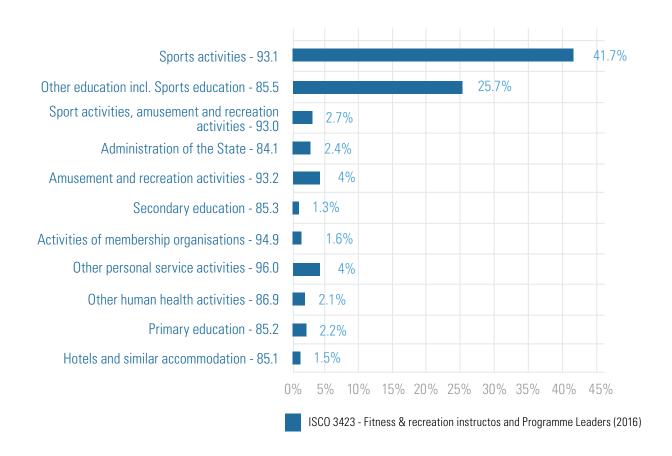


Once again, the majority are within 93.1 (Sports Activities Organisations) but slightly over a quarter can be found in 85.5 (Other Education including Sports Organisations — as defined above). Moreover, from these statistics, it can be underlined that more than half of people working as coaches, instructors and officials in the EU are working in a non-sport organisation.



Figure 32 shows which types of organisations employ fitness and recreation instructors and programme leaders (ISCO 3423). From the available statistics, we have been able to highlight the top 11 types of organisations in which fitness and recreation instructors and programme leaders are employed.

Figure 32: ISCO 3423 in NACE codes



The distribution here is similar to that for sports coaches, instructors and officials with most working for sport organisations but more than 58% are working in an organisation whose main business is not the provision of sport. Over a quarter of fitness and recreation instructors and programme leaders are working within 85.51 (Other Education).



# 4.11 PEOPLE WORKING IN A SPORT ORGANISATION (NACE 93.1)

This section uses Eurostat figures for the period 2011-2018 to estimate and break down the number of people working in sport organisations (classified as NACE 93.1 – Sport Activities). NACE 93.1 is made up of the following (4 digits):

- \$ 93.11 Operation of sports facilities
- 93.12 Activities of sport clubs
- 93.13 Fitness facilities
  - 93.19 Other sports activities

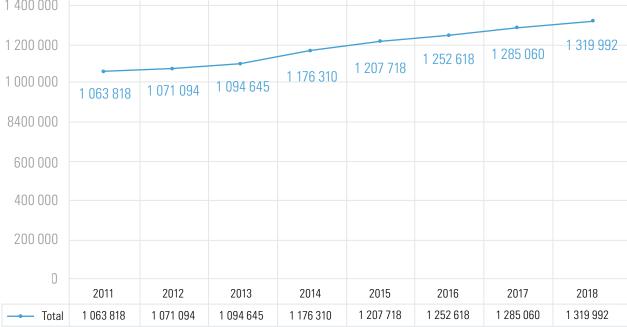
By sport organisation we mean an organisation whose main business is the provision of sport (e.g. sport clubs, fitness centres). The following figures include people working in a sport organisation and having a sport-specific occupation (e.g. a coach) OR a non-specific sport occupation (e.g. manager).

#### 4.11.1 Total number of people working in a sport organisation in the EU (NACE 93.1)

Figure 33: Total number of people working in a sport organisation (NACE 93.1)

Figure 33 shows the total working population involved in sport-specific organisations (all jobs) as of 2018 it is 1 319 992. This compares with a figure of 1 063 818 in 2011.





Thus, there is a growth during this period from 2011 to 2018 of 24.1% and in 2018 this represents almost 75% of the EU total sport labour market. There is an overall upward trend 2011 - 2018.

#### 4.11.2 People working in a sport organisation in the EU by gender

Figure 34 shows the percentages of males and females in this occupational group over the eight-year period. Those working in sport organisations are more likely to be male than female and the gap over the period has not changed significantly. These statistics also highlight that there is a higher percentage of females acting in sport organisations compared with the EU total sport labour market (section 4.8 above).

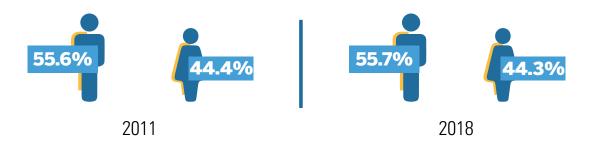
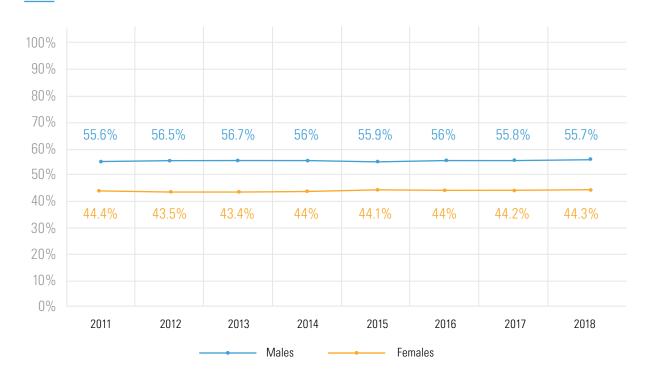


Figure 34: People working in a sport organisation (NACE 93.1); percentage by gender



**Note:** For some EU Member countries the breakdown by gender was not available so the percentages which appear in this figure have been calculated from the following sample of the total number of people working in a sport organisation (NACE93.1):

Year	2011	2012	2013	2014	2015	2016	2017	2018
Size of the sample (% of the total number of people working in a sport organisation)	97.8%	96%	96%	96.1%	98.4%	95.1%	95.3%	93.6%

#### 4.11.3 People working in a sport organisation in the EU by age

Figure 35 shows the percentage breakdown of people working in a sport organisation by age bands. These are the age bands used by Eurostat. The majority of people working in sport organisations fall into the 25-49-age bracket as it is the case for the EU total sport labour market. This is summarised in the graph below.

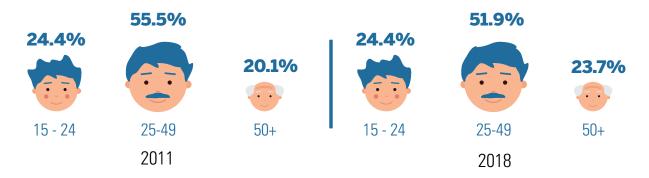


Figure 35: People working in a sport organisation (NACE 93.1); percentage by age bands



The trend over the last eight years has been for the older age group to increase while the middle age group decreases and the young age group stays the same.

**Note:** For some EU Member countries the breakdown by age group was not available so the percentages which appear in this figure have been calculated from the following sample of the total number of people working in a sport organisation (NACE 93.1):

Year	2011	2012	2013	2014	2015	2016	2017	2018
Size of the sample (% of the total number of people working in a sport organisation)	97.2%	95.4%	95.4%	95.5%	97.8%	95.1%	94.9%	93.8%

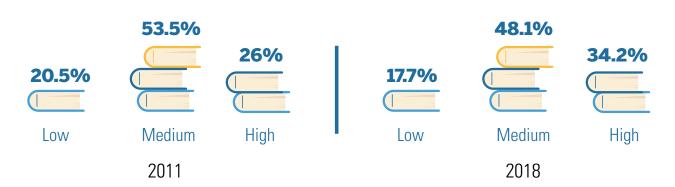
## 4.11.4 People working in a sport organisation in the EU by level of education

Figure 36 shows the percentages of people working in sport organisations by level of education.

The levels here are those taken from UNESCO's International Classification of Education (ISCED) which align fairly closely with the levels used in the European Qualifications Framework (EQF).

	<b>ISCED 2011</b> (data from 2014 onwards)	<b>ISCED 1997</b> (data up to 2013)
Low education	Levels 0-2	Levels 0-2
Medium education	Levels 3-4	Levels 3-4
High education	Levels 5-8	Levels 5-6

The majority of people working in a sport organisation have a middle education level, but the gap between this group and those with higher education qualifications is narrowing. There is a growing number of high educated workers and a decreasing number of low educated workers in sport organisation. This tendency is the same for the EU total sport labour market as presented in section 4.7, this is summarised in the graph below.





100% 90% 80% 70% 60% 52.9% 53.5% 53.3% 48.8% 48.1% 50% 40% 34.2% 34.4% 32.5% 31.1% 31.4% 29% 28.6% 26% 30% 20% 20.5% 18.5% 10% 17.7% 17.1% 17.7% 17% 16.5% 16.8% 0% 2015 2017 2018 2011 2012 2013 2014 2016

Figure 36: People working in a sport organisation (NACE 93.1); percentage by education level

**Note:** For some EU Member countries the breakdown by level of education was not available so the percentages which appear in this figure have been calculated from the following sample of the total number of people working in a sport organisation (NACE 93.1):

Medium

High

Year	2011	2012	2013	2014	2015	2016	2017	2018
Size of the sample (% of the total number of people working in a sport organisation)	95.4%	93.6%	93.6%	93.9%	96.1%	93.8%	94.7%	92.5%

# 4.11.5 People working in a sport organisation in EU by type of working contract

Low

Figure 37 shows the percentages of people working in a sport organisation by full- and part-time contracts. More than half of people working in a sport organisation are employed on full-time contract and the proportion has changed very little over the eight-year period. This is summarised in the table below.



Figure 37: People working in a sport organisation (NACE 93.1); percentage by type of contract



**Note:** For some EU Member countries the breakdown by type of contract was not available so the percentages which appear in this figure have been calculated from the following sample of the total number of people working in a sport organisation (NACE 93.1):

Year	2011	2012	2013	2014	2015	2016	2017	2018
Size of the sample (% of the total number of people working in a sport organisation)	96.9%	95%	95.1%	95.2%	97.4%	94.8%	95.1%	94%

## 4.11.6 People working in a sport organisation in the EU by professional status

This part of the analysis looks at the breakdown between people who work in a sport organisation who have employed status (both full-time and part-time) and those who are self-employed.

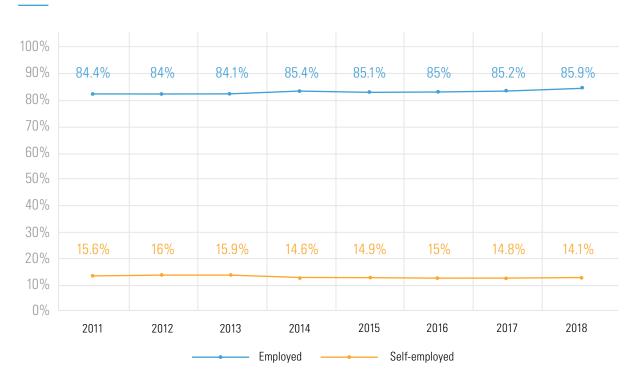
Figure 38 shows the percentages of people who work in a sport organisation who have employed and self-employed status. A large majority have employed status, and this has remained the case over the eight-year period.



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In comparison with people with a sport-specific occupation discussed above, the proportion of people in sport organisations with employed status is around 15% higher.

Figure 38: People working in a sport organisation (NACE 93.1); percentage by professional status



**Note:** For some EU Member countries the breakdown by professional status was not available so the percentages which appear in this figure have been calculated from the following sample of the total number of people working in a sport organisation (NACE 93.1):

Year	2011	2012	2013	2014	2015	2016	2017	2018
Size of the sample (% of the total number of people working in a sport organisation)	93.8%	94%	94%	94.2%	94.6%	94%	94.8%	94.1%

After presenting the total number of people working in an organisation whose main business is the provision of sport (NACE 93.1), it is possible to use the ISCO classification and underline the main general types of occupations which are included within these sport organisations.

Based on the statistics collated at the national and European level, it has only been possible to make this analysis for the year 2016. The idea is to provide an overall picture of the types of occupations that can be found within sport organisations in Europe.

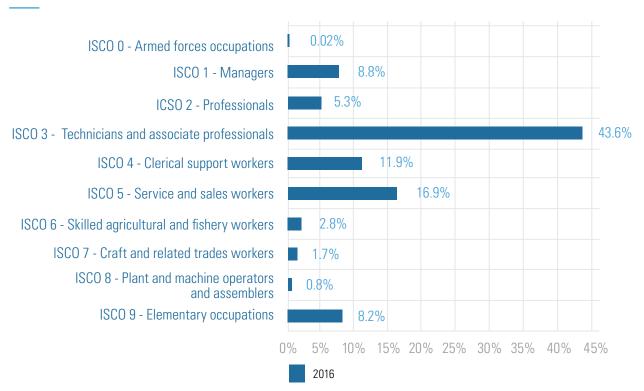
The percentages presented in the figure below can be considered reliable as they are based on 93.5% of the total number of people working within a sport organisation in Europe.

Sport and Fitness Workers (ISCO 342) are included within the ISCO 3 "Technicians and associate professionals". (see introduction for information about ISCO Classification).

A large proportion of people working in sport organisations in the EU are working as technician and association professionals (category which includes all sport and fitness workers). 16.9% of those engaged in sport organisations are having an occupation of service and sales (e.g. conductors, cooks, lifeguards) and nearly 12% are acting as clerical support workers (e.g. secretaries, receptionists).

The rest of the breakdown is included in Figure 38

Figure 38: ISCO codes within NACE 93.1



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ISCO CODES WITHIN NACE 93.1	EXAMPLES OF OCCUPATIONS
ISCO 1 - Managers	Managing Directors and Chief Executives, Business Services and Administration Managers, Hotel and Restaurant Managers, Retail Trade Managers, Sports and Recreational Centre Managers
ISCO 2 - Professionals	Science and Engineering Professionals, Architects and Designers, Health Professionals incl. Medical Doctors, Veterinarians, Physiotherapists, Dieticians and Nutritionists, Teaching Professionals, Business and Administration Professionals, Information and Communications Professionals, Journalists, Psychologists, Lawyers
ISCO 3 - Technicians and associate professionals	Sports and Fitness Workers incl. Athletes and Sports Players, Sports Coaches, Instructors and Officials, Fitness and Recreation Instructors and Programme Leaders, Information and Communications Technicians, Health Associate Professionals, Business and Administration Associate Professionals
ISCO 4 - Clerical support workers	Secretaries, General Office Clerks, Receptionists, Accounting and Bookkeeping Clerks, Transport Clerks
ISCO 5 - Service and sales workers	Travel Attendants, Conductors and Guides, Cooks, Waiters and Bartenders, Building and Housekeeping Supervisors, Sales Workers incl. Shop Salespersons and Ticket Clerks, Protective Services Workers (e.g. lifeguards)
ISCO 6 - Skilled agricultural and fishery workers	Market Gardeners, Animal Producers, Subsistence Farmers, Fishers, Hunters and Gatherers
ISCO 7 - Craft and related trades workers	Building and Related Trades Workers, Painters, Cleaners, Bicycle and Related Repairers, Handicraft Workers
ISCO 8 - Plant and machine operators and assemblers	Car, Van, Bus and Motorcycle Drivers, Assemblers, Stationary Plant and Machine Operators
ISCO 9 - Elementary occupations	Domestic, Hotel and Office Cleaners and Helpers, Agricultural, Forestry and Fishery Labourers, Food Preparation Assistants, Messengers and Package deliverers, Other Cleaning Workers





# 5.1 THE EUROPEAN TOOLS AND PRINCIPLES

Since the turn of the millennium a number of European tools and principles have been launched to meet the needs for lifelong learning, increased mobility of learners and workers, and to help national reforms in education and training. These tools help the achievement of the European Union education and training long-term strategic objectives which are to make lifelong learning and mobility a reality, to improve the quality and efficiency of education and training, to promote equity, social cohesion and active citizenship and to enhance creativity and innovation at all levels of education and training. They aim to give greater access to learning and/or employment opportunities within the European countries, and thus encourage mobility.

The European Qualifications Framework (EQF) and National Qualifications Frameworks (NQFs), the European Credit system for Vocational Education and Training (ECVET), Europass, the European quality assurance reference framework for Vocational Education and Training (EQAVET), the European principles and guidelines on validation of non-formal and informal learning and the European taxonomy on skills, competence, occupations and qualifications (ESCO) have all been designed to make qualifications easier to understand and to recognise throughout the EU. This in turn makes knowledge, experience, skills and competences more transparent, comparable and portable.

The common element to all the tools is their focus on the outcomes of learning, on what a person knows, understands and is actually able to do, rather than a concentration on how, how long and where somebody has been learning. The focus on learning outcomes is helpful to employers and employees alike as it clarifies for learners the objective of their learning process and for employers what they can expect from a particular qualification. All the European tools and principles systematically encourage the use of learning outcomes to define and describe qualifications and they are the most visible manifestation of European cooperation in the field of education, training and learning.

The EU tools and principles are part of an intense effort to renew and modernise VET systems and as a demonstration of the willingness of member states to seek common solutions, thus acknowledging that national VET policies must be pursued within a wider international context.

Instruments like the EQF, ECVET, Europass and EQAVET would not have happened without the increased European cooperation in education and training from 2002 onwards. Also, the development and gradual implementation of the tools at national level would not have happened without them reflecting national agendas and needs.

Developing European tools and principles has stimulated dialogue among a wide range of stakeholders, including governments, social partners, institutions, learners and VET providers from the public and private sectors. A shared understanding of qualifications and how they relate to each other is emerging. The dialogue has also improved links between different parts of national education and training systems; how systems of other countries relate to each other; and how education and training can be more relevant to labour market needs.

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#### The European Qualifications Framework (EQF)

The EQF supports lifelong learning and mobility by being a common reference framework for qualifications. It has eight levels (from basic level 1 to advanced level 8) which enables national qualifications (i.e., general and higher education and vocational education and training) to be compared with each other and those of other countries. The idea is to make comparison between national qualifications easier and to allow people not to repeat their learning if they move to another European country. Based on an EU recommendation dating back in April 2008, the EQF is triggering the development of national qualifications frameworks (NQFs) all over Europe and worldwide.

The full implementation of the EQF will allow, for example, an enterprise in an European country to understand the level of qualification of a job applicant from another European country as the applicant's certificates will correspond to an EQF reference level which itself bears to one of the national qualification level of the enterprise's country. Mobility of workers, as well as learners through lifelong learning, between European countries should be facilitated.

NQFs share many common characteristics and also reflect national traditions, values and objectives. NQFs are contributing to the shift to learning outcomes approach as they are built on learning outcomes based qualifications levels that create better transparency and comparability.

#### **European credit system for vocational education and training (ECVET)**

ECVET promotes geographical and professional mobility. It helps validate, recognise and accumulate work-related skills and knowledge acquired during a stay in another country or in different situations, so that these experiences contribute to vocational qualifications. Therefore, this system helps learners to accumulate the learning outcomes they acquired in different countries. The system ideally should be compatible with the European Credit Transfer and Accumulation System (ECTS) which is applied in higher education.

ECTS allows the recognition of workload and learning outcomes achieved through formal education. An academic year corresponds to 60 credits which represent a workload ranging from 1,500 to 1,800 hours after which students are expected to acquire targeted learning outcomes described in the institution's courses and programs. ECTS allocate credits to training pathways and courses' contents given students' workload. ECVET has a different perspective as it concerns vocational education and training and recognise credits for the achievement of learning outcomes, no matters how or for how long they were achieved.



The development of ECVET began in 2002 after the Copenhagen Process emphasised the need for a credit system for VET. The system has been developed by the Member States and the social partners in cooperation with the European Commission and has been adopted through a Recommendation by the European Parliament and the Council in 2009.

The technical components for ECVET can be classified in three main categories in relation to:

- Qualification design (qualifications, units of learning outcomes and credit points)
- The process of accumulation of learning outcomes (assessment, validation and recognition of learning outcomes)
- The transfer process (memoranda of understanding, learning agreements and learners transcripts of records)

In general terms, there is a common agreement on the importance of the principles underlying ECVET, namely the unitisation (or modularisation) of educational systems, and the description of qualifications in terms of learning outcomes, as well as the importance of easing the recognition and transferability of learning outcomes acquired within mobility.

#### **Europass**

Europass is a tool which helps people who are seeking a job in a European country to present their qualifications and skills in a way that employers can understand and appreciate. Europass supports mobility by helping people to communicate their knowledge, skills and competences acquired through education, training or work experience as well as in informal settings. Europass comprises five documents: the Curriculum Vitae, and Language Passport, while the Europass Mobility the Certificate Supplement and the Diploma Supplement respectively record additional information on learning from a stay in another European country, linked to a VET qualification and linked to a higher education diploma.

With the development of the European Skills passport, Europass became an electronic portfolio to help citizens present their knowledge, skills and qualifications to find a job or to study in Europe.

## European quality assurance framework for vocational education and training (EQAVET)

EQAVET aims to increase the transparency, market relevance, consistency and transferability of vocational education and training qualifications across Europe. It is a joint cooperation between the Member State of the European Union, the Social Partners and the European Commission to develop a culture of quality assurance at national and European levels in VET. EQAVET is compatible with the main quality models. It includes a quality assurance and improvement cycle based on quality criteria and indicative descriptors. It addresses both VET systems and VET providers.

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#### Validation of non-formal and informal learning

European countries are increasingly emphasising the need to recognise the full range of an individual's knowledge, skills and competences — those acquired not only at school, university or other education and training institutions, but also outside the formal system. This requires new approaches to validate such learning experiences (i.e. identify, document, assess and/or certify), making them usable for further studies or advancement in work. Helping people in this way could also make a contribution to smart, sustainable and inclusive growth.

Validation of non-formal and informal learning experiences in the EU Member States makes an essential contribution to EU's ambition to achieving smart, sustainable and inclusive growth set by the Europe 2020 Strategy. Its impact can be significant in the labour market functioning: validation mechanisms allow for more transparency on the skills available in the workforce and facilitate a better match between skills and labour demand, promote better transferability of skills between companies and sectors and facilitate mobility on the European labour market.

By easing occupational and geographical mobility and allowing for a better skills match, validation can have an important impact in addressing skills shortages in growing sectors and support economic recovery. In times of an ageing population and shrinking workforce, validation of informal and non-formal learning experiences can also help Europe bring those furthest away from the labour market closer to new learning and work opportunities and tap into all human capital to combat unemployment, boost productivity and competitiveness. In particular, validation can support young unemployed looking for their first job or with very little professional experience to demonstrate and create a market value for their skills and competences acquired in different contexts.

From an individual perspective, validation brings prospects of enhanced employability, increased wages and career moves, easier transferability of skills across countries, second chances for those who have dropped out from school prematurely, improved access to formal education and training, greater motivation to learn and increased self-confidence.

#### Lifelong guidance and counselling

The current European Union policy and strategy framework for lifelong learning (general education, vocational education and training, higher education, adult learning) and employment sets favourable conditions for establishing holistic and coherent lifelong guidance systems in the Member States to cater fully for the information, advice and guidance needs of diverse target audiences in their learning and career pathways.

Many recent EU documents address the importance of guidance in aiding lifelong learning in formal, informal and nonformal settings as well as in improving the employability and active labour market participation of all citizen groups. In this context, the main aim of lifelong guidance is to support individuals' acquisition and continuous development of knowledge, skills and competences.

Starting from this overall EU-level framework, the Member States are developing guidance policies, systems and practices against the priorities identified in the Council resolution on better integrating lifelong guidance into lifelong learning strategies (Council of the European Union, 2008). There are four priority areas: encouraging policy coordination and cooperation; establishing quality assurance mechanisms; widening access to guidance services for all citizens; and developing career management skills.

ESCO, the European Skills, Competencies and Occupations taxonomy, is a multilingual classification of European Skills/ Competences, qualifications and Occupations developed by the European Commission. ESCO will facilitate the development and implementation of instruments responding to job matching, identifying skill shortages, providing career guidance or presenting labour market information. It is one of the main deliverables of the "New Skills for New Jobs" communication and has the potential to offer a common language to close the terminological gap in communication and data exchange between education and training and the labour market. The fact that ESCO provides a multilingual terminology enhances the transferability and comparability of knowledge, skills and competences descriptions between countries and support learners' as well as workers' mobility within Europe. Furthermore, improves the exchange of knowledge, skills and competences related information and data between educational institutions, administration, individuals and enterprises and thus may contribute to better statistical comparability and improvement of forecasting methods.



# 5.2 COMMON THEMES AT NATIONAL LEVEL

#### **Responsible ministry**

Every nation in Europe has a ministry with responsibility for education. In many cases other portfolios are housed within the same ministry, for example in Bulgaria it is the Ministry of Education and Science, in Malta the Ministry of Education and Employment, and in Sweden the Ministry of Education and Research. Sometimes sport is part of the education ministry such as the case of Cyprus with the Ministry of Education, Culture, Sport and Youth.

In a number of countries education competences are shared between a number of different ministries. One example of this is Denmark where higher education falls under the Ministry of higher Education and Science, which is different to the Ministry of Education which covers primary and secondary level education.

The non-federal structure of some countries can be seen in the attribution of competence for education regulations and systems. One example of this is Germany where in the field of education, the federal system of the Federal Republic of Germany comes into effect to a high degree. Education is a matter of each single federal state, even such basic topics as the number of years of schooling until graduation might vary from federal state to federal state.

The central role of the education ministries is to be responsible for formulating, conducting, implementing and evaluating the national policies for education, often including vocational education and training as well as school-based education.

#### **School systems**

Within the ESSA-Sport project the national coordinators reported on the structure of the school system in their country. This provides valuable background to the system of education which education in sport exists beside and as a part of. Schooling is compulsory in every European nation, although with different starting ages up to the age of 7, and different lengths of compulsory education spanning primary and secondary education.

School education is state-funded except in those instances where parents choose to send their children to a private institution, which in exist in most countries.

Some countries prioritise certain factors in the compulsory school education, such as Malta where importance is given to foreign languages, literacy and digital literacy. In Belgium secondary education includes general, technical, artistic and professional programmes.

Often at the secondary school level it is possible to choose a vocational route. In Ireland the post-primary education sector comprises secondary, vocational, community and comprehensive schools. In Sweden upper secondary school consists of 18 national programmes and five introductory programmes for students who are not eligible for a national programme. Among the national programmes, there are 12 vocational programmes and six higher education preparatory programmes.

One interesting area of further research would be to find out if secondary school level vocational programmes allow for study related to the sport and physical activity sector. As a growing area of employment sport could begin to be seen in such programmes in the future.

#### **Higher education**

Higher education in Europe is typically comprised of education leading to Bachelor's and Master's degrees as well as postgraduate and doctorate study. The aim of academic higher education is to prepare for independent research activities and to provide theoretical basis for professional activities.

While public, state-funded universities predominate in the higher education sector in Europe; private institutions also exist in some countries, such as in Bulgaria where 11 out of 46 universities are private. Higher education can also be delivered in some cases at institutions which do not have the designation of a university. Within public universities the level of fees payable by the student differs between countries from, for example, Hungary where students typically study without fee payment, to the UK where significant student fees are paid in the form of loans from the Government.

In most countries higher education is overseen by Government-mandated organisations responsible for policy, funding and quality assurance. Examples include the Higher Education Authority in Ireland which is the statutory planning and development body for higher education and research in Ireland and also the funding authority for higher education institutions. The Cyprus Agency of Quality Assurance and Accreditation in Higher Education (CYQAA) is an example of a quality assurance agency for higher education, CYQAA is a member of the European Association of Quality Assurance in Higher Education.

Developments at the national level in higher education often link to European developments. Since 2005 the "Bologna Process" has been influential in reforming higher education, including the introduction of the European Credit Transfer System (ECTS) and study cycles which provide common structure and support mobility. An example can be given of Portugal where generic qualification descriptors were established for each cycle of studies, based on the acquired competences, as well as the definition of ECTS intervals for the first and second cycle of studies.

#### **Vocational education and training**

Many countries have seen reform to the vocational education and training (VET) system in recent years, often linked to European principles and tools. VET is normally characterised by a mixed economy of providers operating within a state-regulated system with oversight from the relevant Government ministry. VET can include both initial and continuing vocational education and training.

In Finland authorisation to provide education is required and VET is organised by different types of education providers: municipalities, joint municipal authorities, the state and the private sector. This is typical across Europe.

Dedicated VET schools are common in some countries such as the Netherlands where VET schools maintain extensive relations with regional businesses, municipalities and social organisations; and Germany where VET exists in a dual system where around 330 training occupations are recognised by the Vocational Training Act. VET study has strong links to the labour market but can also prepare students for further study. Public colleges are also a common provider of vocational education.

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In Hungary, in alignment with EU policies, the education/training market has been liberalised in the last decade. Aligning with EU policies is common and the introduction of national qualifications frameworks has impacted on the VET sector. For example since 2016 VET providers in Sweden may affiliate their qualifications to the Swedish national qualifications framework, SeQF.

Also in line with EU principles, learning outcomes are now the common currency of VET provision. In Poland the VET curricula is described in the form of expected learning outcomes common to all occupations, e.g. health and safety; and learning outcomes common to specific professions.

The VET sector in the United Kingdom is an interesting case where vocational qualifications are provided by awarding organisations (AOs), which are external to the education or training provider. AOs are private companies, with either commercial or charitable status, funded mainly by examination fees. They develop and deliver qualifications to meet government policy requirements and changing skills requirements and to respond to market demand. Awarding organisations must gain recognised status from the qualifications regulator Ofqual before they can propose qualifications for accreditation.

#### **Quality assurance**

It is essential there is trust and confidence from all stakeholders in the education and skills development system. This trust is achieved through quality assurance. Education providers issuing certificates need to be subject to a quality assurance process that can be trusted to ensure consistency. Quality assurance can be defined as "a process through which accredited status is granted to a programme of education or training, showing it has been approved by the relevant legislative or professional authorities by having met predetermined standards" (Cedefop, 2008).

This process can be considered as crucial in order to ensure the efficient implementation of education and training systems. It is directly related to the "verification" and "accreditation" of qualifications being delivered by education and training providers. The monitoring of quality assurance is concerned with promoting confidence amongst employers, professionals, providers and the public that a programme of learning has met agreed criteria. It is particularly important that it can be proven, via a system of 3rd party verification, that providers and their qualifications are meeting the expectations of the sector which the qualification relates to.

Quality assurance systems are being developed throughout Europe at the national level. This is often in conjunction with national qualification framework developments and is the responsibility of national qualifications agencies.

Examples can be seen from countries across Europe. In Lithuania the VET education and training quality assurance and accreditation body is a Qualifications and Vocational Education and Training Development Centre. In Scotland organisations which provide non-university qualifications can elect to be accredited by the Scottish Qualifications Authority. In Bulgaria vocational education and training providers are monitored by the National Agency for Vocational Education and Training, and quality assurance is provided according to developed national programmes for VET in each profession of the National Register of Professions and Occupations in Bulgaria and their required educational level.

Qualifications agencies oversee quality assurance in the VET sector, operating in line with European principles. Cedefop regularly produces reports detailing the quality assurance system in countries across Europe and monitor developments.

Before looking at some examples provided by the ESSA-Sport national coordinators it is useful to present information from Cedefop who regularly collate and present data and updates on the implementation of national qualifications frameworks<sup>1</sup>.

According to Cedefop. frameworks help to make qualifications easier to understand and compare. They can also encourage countries to rethink and reform national policy and practice on education, training and lifelong learning.

National qualifications frameworks (NQFs) classify qualifications by level, based on learning outcomes. This classification reflects the content and profile of qualifications - that is, what the holder of a certificate or diploma is expected to know, understand, and be able to do. The learning outcomes approach also ensures that education and training sub-systems are open to one another. Thus, it allows people to move more easily between education and training institutions and sectors.

The main catalyst for the development of comprehensive national qualification frameworks in Europe has been the European qualifications framework (EQF). All countries committed to the EQF are developing or implementing national frameworks mostly covering all levels and types of qualifications, this includes the 28 EU member states.

The development of national qualifications frameworks in Europe also reflects the Bologna process and the agreement to implement qualifications frameworks in the European higher education area (QF-EHEA). All countries implementing the EQF are participating in this process.

<sup>&</sup>lt;sup>1</sup> https://www.cedefop.europa.eu/en/events-and-projects/projects/national-qualifications-framework-ngf



#### Cedefop further report:

- 39 countries are cooperating on the European qualifications framework implementation
- \$\text{35 countries have officially established or formally adopted their national qualifications frameworks (NQFs); 4 countries are still working on the design and/or the formal adoption of their NQFs
- © Cedefop considers 21 NQFs to have reached operational status; Austria, Belgium (FL), Czech Republic (partial framework for vocational qualifications NSK), Denmark, Estonia, Finland, France, Germany, Ireland, Latvia, Lithuania, Liechtenstein, Luxembourg, Malta, the Netherlands, Norway, Portugal, Slovenia, Sweden, Switzerland and the UK
- \$\sigma\$ 35 countries are working towards comprehensive NQFs covering all types and levels of qualification from formal education and training (VET, HE, general education); and increasingly opening towards qualifications awarded outside formal education and training (e.g. Austria, Netherlands, Poland, Slovenia, Sweden)
- \$\sigma\$ 35 countries had formally linked ('referenced') their national qualifications frameworks to the EQF
- \$\times\$ 29 countries participating in the EQF implementation have also self-certified their framework against the Bologna framework (QF-EHEA), 20 jointly with the EQF referencing
- 23 countries have introduced NQF/EQF levels in national qualifications documents.

The following national examples are taken from the ESSA-Sport national reports:



#### **Cyprus**

The system introduced is called Cyprus Qualifications Framework (CYQF) and its main role is to classify qualifications according to agreed learning outcomes. More specifically, objectives and targets are: Supporting recognition and validation of qualifications; Enabling progression and mobility; Promoting lifelong learning Improving quality assurance of education and training programs; Strengthening links with the labour market.



#### **Denmark**

The Danish Qualifications Framework distinguish between levels 1-5 and levels 6-8, with the latter being the higher education system.



#### **Ireland**

The Irish National Framework of Qualifications (NFQ), established in 2003, is a framework through which all learning achievements may be measured and related to each other in a coherent way. The Irish NFQ is an awards framework of 10 levels, which is aligned to the European Framework of Qualifications. The many different types and sizes of qualifications included in the NFQ, are organised based on their level of knowledge, skill and competence.



#### Lithuania

Lithuanian qualifications framework (LTQF) was adopted by the Government on May 2010. LTQF is based on eight learning outcomes levels. LTQF addresses five main objectives: 1) better adapting qualifications to the needs of labour market and society; 2) help to improve clarity of qualifications design to improve assessment and recognition; 3) increase transparency of qualifications and assist individuals in using them; 4) support national and international mobility; 5) encourage lifelong learning and allow individuals to build on outcomes of non-formal and informal learning.



#### **England**

The Regulated Qualifications Framework (RQF) is the regulatory qualifications framework for England. Qualifications accepted for use by the regulator Ofqual are placed on the Register of Regulated Qualifications, with information on their level and size to indicate their position on the RQF.

It is useful for stakeholders in the sport and physical activity sector to study these developments as for the sector to become fully recognised and for all learning to be visible providers of sport education will need to link to such qualification systems in the VET sector.

#### **Apprenticeships**

According to Cedefop apprenticeship schemes can be fundamentally different in their strategic function and purpose, with implications for the way they are defined and placed in national education and training systems.

Cedefop discern two main distinct purposes and functions, apprenticeship as an education and training system and apprenticeship as a type of VET delivery within the formal VET system.

It is important for stakeholders in the sport and physical activity sector to understand the national structure, function and funding of apprenticeships to explore whether sport occupations can be included in the system, further enhancing and legitimising employment in the sector. In some countries apprenticeships in sport are well established and in sport is not part of the apprenticeship system.

In the UK apprenticeships are for adults and for young people aged 16+, who are in employment. They incorporate both on- and off-the-job training. In Finland apprenticeship training is provided in the form of a fixed term, practical work assignment based on a written employment contract and primarily carried out at a workplace - these studies are complemented by theoretical studies. In Portugal the purpose of apprenticeships is to prepare and qualify students for their first job and ease their entry into working life.

It is clear from these examples that apprenticeships should be considered as a practical structured pathway to entry in to the sport sector.

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# **6.1 DEVELOPMENTS AT THE EUROPEAN LEVEL**

#### 6.1.1 Involvement of the EU in sport education

Since the Lisbon Treaty (2009) gave official competence for sport to the European Union, EU sport policy has developed over the past 10 years. Education in sport has frequently been a feature of policy and initiatives in sport at the EU level.

The Erasmus+ programme (2014 – 2020) offers EU support for sport projects including in the new priority area of "Promote education in and through sport with special focus on skills development". Education features in the current EU Work Plan for Sport that came into force in July 2017 and runs until 2020.

One of the two Expert Groups formed in support of the current work plan is the Expert Group on Skills and Human Resources Development coordinating action between the EU and Member States.

A current area of work for the Expert Group at the end of 2019 is the "Guidelines regarding the minimum requirements in skills and competences for coaches", while a report published in the area of education under the previous Work Plan was a "Study on sport qualifications acquired through sport organisations and the (sport) educational institutes"<sup>1</sup>.

#### 6.1.2 Lifelong learning strategy for sport and physical activity

The Lifelong learning strategy for sport and physical activity, developed by EOSE, also known as the "7 Step Model" provides a framework for the development of a strategic approach to ensure that vocational education, training and qualifications exist to support the development of the growing sport workforce.

The model aims to bring the education and employment stakeholders together in a collaborative approach to ensure that sport education provision is fit for purpose and in line with the needs of the labour market.

The 7 Step Model links to the European tools and principles for vocational education and training and was developed to promote a transparent and flexible education and training system with clear learning and career pathways.

The 7 Step Model has been designed to be flexible so that it can be used by a wide range of stakeholders and to achieve a variety of education or employment objectives in the sector. The model offers a common and consistent approach but its implementation will be different depending on the specific systems and the roles and needs of stakeholders.

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<sup>&</sup>lt;sup>1</sup> Final report of the Study available at https://op.europa.eu/en/publication-detail/-/publication/28026772-9ad0-11e6-868c-01aa75ed71a1/language-en (2016, PwC and Coni Servizi)



## THE 7 STEP MODEL (EOSE, 2015)



The first five steps of the model are about understanding the labour market and competence required to work in the sector, the final two steps are about developing appropriate education strategies and courses to meet the demands of the sector which have been defined in Steps 1 to 5.

The 7 Step Model has been implemented through several EU funded projects with one good example being the S2A Sport project to implement the Model in the area of sport administration<sup>2</sup>.

The 7 Step Model is a good example of collaboration and partnership at the European level to implement education reform in the sport sector and increase the credibility and standing of the sector as a whole.

<sup>2</sup> EOSE (2018). S2A Sport project "From Strategy to Action: Supporting the professionalisation of sport organisations through the definition of work-based competencies and the development of fit-for-purpose training for Sport Administrators", funded under the Erasmus+ programme (Key Action 2 – Strategic Partnership for Vocational Education and Training). See https://www.s2a-sport.eu/



# 6.2 KEY FINDINGS FROM ESSA-SPORT NATIONAL REPORTS

## 6.2.1 Sport in schools

The delivery of sport in schools can plant the seed for sustained participation in sport and physical activity throughout life. At the same time a bad experience of sport in school can be a factor in decreased levels of activity in later life. Research suggests participation in sport and physical activity at school can be beneficial to academic achievement.

It is therefore interesting to study how sport and physical education is delivered in schools across Europe and this was a topic included in the ESSA-Sport national reports.

An example of the goals of physical education (PE) can be seen in Cyprus where the main goal of PE in secondary education is not just for the students to acquire a positive stance for life-long physical activity for health promotion, but also to share values and develop behaviours, so as to function productively in the 21st century community.

In Denmark as well, since the 1970s the focus of physical activity in schools has expanded to include societal elements to which sport and physical activity contribute, such as health and social aspects. In Sweden, teaching in the subject of physical education and health should aim at pupils developing all-round movement capacity and an interest in being physically active and spending time outdoors in nature.

Some countries prioritise certain sports, for example in Ireland where the focus is on swimming, cycling and running which it is believed have the greatest potential for generating higher levels of active participation across the life course.

Given increasing levels of inactivity and obesity in children, some countries consider testing fitness levels of students and one country where this has been enacted is Hungary where the development of a new health related physical fitness test battery allows for evaluation of health enhancing physical fitness of students according to standard criteria and methodology, and allows the measurement and monitoring of the efficiency of daily physical education classes from the point of view of physical fitness.

The most common amount of physical education/ activity as part of the curriculum appears to be two sessions per week, as is the case for example in Bulgaria and Latvia, with a minimum of two in Finland and in Denmark public schools are obligated by law to ensure that children get a minimum of 45 minutes of physical activity per day.

# **6.2.2 Sport qualifications in universities**

Higher education institutions are a significant part of the sport sector in all countries; this is both due to the sport participation undertaken by students and the number of academic sport-related courses that can be studied. Sport qualifications in universities were therefore an important part of the ESSA-Sport national reports, and some common themes can be summarised from the reports, with examples.

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The extent of sport qualifications in higher education can be seen in the example of Portugal, where at the first study cycle level (EQF/NQF level 6), there are sports qualifications available at 30 higher education institutions (18 universities and 12 polytechnic institutes). The main education fields are: physical activity and healthy lifestyles, sports science, dance, sport, sport and physical activity, sport and wellness, sport physical condition and health, sport and leisure, nature sport and active tourism, physical education and sport, sport management, human kinetics and sports training.

This broadening of the sport course offer, to cover niche and specialist areas of the sport sector is a growing feature of sport education in many countries including Ireland and the UK. Sport education in universities is now a very diverse offering in terms of course titles and content.

This can also be seen in Germany where there is a broad number of higher education organisations that offer sport qualifications. A search of study programs in the field of sport showed 81 bachelor's degree programs, 79 master's degree programs and 213 teacher training courses related to the field of study sports. The range of courses offered in these programs is broad and includes both general sports and movement studies courses as well as specific courses of study focusing on individual sports science or related disciplines, specific target groups or fields of work (e.g. "Applied Training Sciences", "Sport Management", "Children and Youth Sports", "Exercise and Health").

Other interesting developments include study towards professional outcomes and a competence-based approach. For example in the Haaga-Helia University of Applied Sciences in Finland the Degree Programme in Sports Coaching and Management students are involved in developing new solutions for coaching and management at the local, national and international level.

The Bologna process in higher education has also been a feature of reform of sport qualifications. In Hungary for example some studies in sport were put in to a 3 year (Bachelor) and 2 year (Master) system. Master courses are now offered in Sport management, Recreation and health studies, Sport economics, and Adapted Physical Education. There are also some specialised post-graduate courses offered, for example Sport Media, Sport Analytics, International Sport Relations - Sport Diplomacy, Sport Psychology, Horse Culture and Inclusive Sport Teacher. Most of the universities in Hungary also offer PhD courses in sport sciences.

The variety of the sport-related course offer in higher education is clearly very attractive to students. The challenge now is to ensure they leave their studies with some of the skills and knowledge required for the labour market, and that sufficient skilled jobs exist to take advantage of this growing talent pool that the sector can draw from. Some of these issues are discussed in later sections.



### 6.2.3 Role of sport federations

Sport federations are a central part of the sport system in all countries. One of the main competences of federations is in the area of education. This normally focuses on education required to become a coach or official in the sport(s) the federation is responsible for but can encompass other subjects as well in some cases. In addition to providing education some federations also operate registration or licencing schemes. National sport federations must increasingly interact with the European or international federation for their sport, while at the same time taking account of developments in the national vocational and qualifications system.

The ESSA-Sport national coordinators discussed the role of sport federations in their national reports and some themes and examples can be highlighted.

In some countries such as Bulgaria and Hungary a state regulated coach education system is in place. In Hungary federations primarily rely on the state regulated coach education system, with federations only taking care of continuous or further education of their licenced coaches. In Bulgaria there is a regulation from the Ministry of Youth and Sport requiring all coaches to have a minimum of Bachelor degree and formal sport education. An example of another country where the profession of sports coach is regulated is Poland.

In other countries federations develop their own systems and standards for education, such as in Denmark where sport federations have their own approach and rules for education and upgrading in the areas of coaching, officiating, management, administration and volunteering. Also in Portugal sport federations have a prominent role in the education and certification of sport coaches and officials/referees, within the scope of both the national and international training and education frameworks and contribute also to sport management/administration and volunteer education

European and international federations have an influence on education at the national level delivered through national federations in a number of countries and sports, including Cyprus where federations run programmes in cooperation with their respective European or international federations.

Federations also work within structures at the national level. In some cases such as Ireland, Cyprus and the UK frameworks are developed by government-mandated national sport or coaching organisations which aim to bring consistency in level and challenge between qualifications among different sports. An example would be the UK Coaching Certificate developments in the UK managed by the publically funded sport agency UK Coaching. Also in the Netherlands there is an emerging framework of officiating levels adopted by some sports.

Finally some sport federations are linking to NQF and EQF developments and becoming recognised in the formal vocational education sector. This can improve quality by linking to standard quality assurance regimes, while increasing the visibility, recognition and transferability of sport education. Some work has taken place at the European level within the European Commission to monitor the state of play of the links between sport qualifications including those offered by federations and national qualifications frameworks<sup>3</sup>.

 $<sup>^3\</sup> http://eose.org/wp-content/uploads/2018/02/XG-HR-NQF-EQF-FINAL.pdf$ 

### 6.2.4 Vocational qualifications in sport and NQF

The report referenced in the previous section "Report on the state of play concerning the inclusion of sport qualifications in NQFs with a reference to EQF", developed for the Expert Group on Human Resources Development in Sport details some developments in this area and updates on the situation in each country in Europe. It concludes that "There appears to be an on-going commitment to the engagement across the Member States. This is evidenced by their ability to articulate their current stage of development with all Member States working towards the NQF in some way."

The ESSA-Sport national coordinators also discussed the link between sport qualifications and NQF. In Lithuania it was reported that implementation of NQF in sport is still in the discussion stage and more political will is required to start the process. While in Portugal it was reported that the implementation of the National Qualifications Framework in sport is well established, referencing national qualifications to NQF/EQF frameworks. The UK is also well advanced with many sport qualifications on the national qualifications frameworks that exist in the different nations of the UK, placed on the framework by accredited awarding organisations that serve the sport and physical activity sector.

In Bulgaria NQF levels have been given to vocational and academic training for different job roles: The NQF in sport begins with level 5 for high school graduates from specialised sport schools, with vocational training in the Assistant Fitness Instructor, Instructor for Sport and Tourism Activities, Sports Events Organizer, Assistant Coach professions, level 6 for professional bachelors in the same professions, and for bachelors in sport, physical education, fitness instructors, etc., level 7 includes master programs for coaches, sport managers, and level 8 for PhD in Sport, and Physical Education.

A further example of alignment of sport qualifications with NQF can be given from Hungary:

In the Hungarian VET-System (OKJ) the sport related courses are under the field of Professions in Education. Within the VET-System the 3-5 levels of the Hungarian Vocational Framework (HVF) include the following educational fields in sport:

**HVF 3**: sport instructor, fitness-wellness assistant

HVF 4: group fitness instructor, fitness instructor, agua trainer

**HVF 5**: Fitness-wellness instructor, sport coach, personal trainer, dance instructor

The providers of this vocational education can be private institutions specialised in this activity (Fitness Academy), Universities (University of Physical Education – Adult Education Section), or even Federations or other sporting bodies.



### 6.2.5 Trends and challenges

One of the themes of the ESSA-Sport project has been to explore and discuss trends and challenges in sport, education, workforce development and skills. The national reports gave the opportunity to the ESSA-Sport national coordinators to look at trends and challenges at the national level and some of them can be presented here.

One challenge highlighted regularly at the European level and within some national reports, is the disparity between the needs of the sector and the graduating students. The number of graduating students is evidently higher than the requirements of the sector. This leads to an interest in entrepreneurship from the students; it can also see talented graduates seeking to enter other sectors. This issue relates to both an "oversupply" of graduates and a need for graduates to have the right skills to enter the sport workforce.

One trend that could impact on organised sport and education in sport is the increase in the tendency to do individual and/or unorganised sports like hiking, running, fitness and street sports for both children, adults and the elderly. These forms of sport do not require any special club, club-owned facility or match-setup. Hence, it is likely that the traditional demands for federation organised programmes/ competitions and education will either decline or change to accommodate the new needs. This issue was particularly highlighted in Denmark but would apply in other countries/ contexts as well.

One trend highlighted is internationalisation in the sector, mentioned by the Finnish ESSA-Sport national coordinator and others, this is characterised by student mobility and education exports.

The regulation of coaches and the education of coaches in relation to the standards and regulations of international federations on one hand, and national qualifications requirements and, sometimes, state regulation, on the other hand is becoming an increasingly significant issue. In some countries new laws allow for coaches to obtain a qualification without being subject to an education and training by a university or a college for the first time. This can to questions over the value of higher education and whether coaches trained in a different system will be able to drive high achievement in athletes. While in other countries a challenge is to adjust regulations as more and more International Federations introduce their own sport education standards and sometimes regulate the employment of coaches of that given sport by making it compulsory to earn their certificates — whether and how this can relate to a national system of education is a question being explored.

The trend towards a wider role for sport in society was highlighted by several coordinators in the ESSA-Sport national reports, the situation in Portugal is typical in this regard, with the ESSA-Sport national report stating "the trend of teaching / training of sport and physical activity will be its link to other areas of knowledge, namely: health, tourism, leisure, well-being, healthy lifestyles".

A final trend that can be mentioned which arose in several ESSA-Sport national reports was the implementation of new leadership and management programmes. In Sweden for example, in recent years, a number of qualified leadership programmes have been produced in order to meet the demands placed on leaders within the sports sector. Given the increased role for sport and new demands leadership training related to innovation and change management, as well as specific topics will become more common.

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### 7.1 OBJECTIVE OF THE SURVEY

In a context of dynamic and complex labour markets, gathering information on current and future skill needs can support better matching of training and jobs. In recent years, better understanding of labour market needs and skills matching have featured prominently on the policy agenda of many countries, driven by both rapid technological advances and global competition. Skills matching can also help reduce unemployment, particularly among young people and build a better life for individuals by improving employability, social mobility and inclusion.

The ambition through the design and launch of the first ever European Employer Skills Survey for the sport and physical activity sector through the ESSA-Sport project was to identify and analyse the growing and changing labour market, to build an up to date picture of employment, and to identify the skill needs, gaps and shortages, and future priorities based on national and EU level research and consultation activities.

A proper understanding of the characteristics and trends of the labour market, which has long been missing in the sport and physical activity sector, is the basis to re-skill the workforce with modern, fit for purpose training and qualifications.

## 7.2 WORKING METHODOLOGY AND STRUCTURE OF THE SURVEY

There is a recognised difficulty in measuring and forecasting skills and collecting information on organisation skill needs and workforce development strategies.

An employer skills survey is a mechanism that helps to define the type, level and composition of skills that individuals need to perform the work demanded of them by organisations in the sector. It can also help investigate future skill needs.

The main purpose of such a survey can be mainly defined as follows:

- To collect data about enterprises' skills use and needs
- To forward information to policy makers and social actors
- To go beyond simple detection of occupational changes
- Solution To contribute to effective future employment strategies

Following a wide desk research on existing employer skills surveys in various sectors, partners and stakeholders of the ESSA-Sport project were engaged and actively consulted at various stage of the development of the survey to gather views, suggestions and opinions from the broadest range of stakeholders from the sport and physical activity sector.

Through this consultation process, it was unanimously agreed to target employers / organisations from the sport and physical activity sector and not individual employees. Overall, the goal of the survey was described to obtain information from employers to lay the foundations for generating and encouraging changes, modernisation and adjustment of strategies to cope with the realities and challenges of the labour market.

This process was extremely important to ensure the survey fitted all types of organisations in the sector, responded to the expectations from the various stakeholders involved, and covered the whole spectrum from professional sport to grassroots level, and both the public and private spheres of work.

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A sample of national organisations were involved in the testing phase of the draft survey to provide comments and make sure the relevancy of the content with national specificities and cultures before the official launch.

The agreed structure of the survey was validated as follows:

- Section 1 About your organisation: Type, size, status, geographical coverage etc
- Section 2 Employment and skills in your organisation: Who you employ and skills required
- Section 3 Recruitment of paid staff and volunteers: What barriers to recruit and retain people
- Section 4 Working in sport and physical activity: Key issues facing the sector
- Section 5 Workforce development and training: How do you train your staff for their role

## 7.3 TARGET GROUP OF THE SURVEY

The aim of the survey was to gather employer views on the realities and challenges facing the sport and physical activity sector which is growing, changing and becoming increasingly important to the social and economic future of Europe, and to make recommendations for future action.

The questionnaire of the survey was designed to be addressed to all type of employers / organisations from the sector and not individual employees.



In terms of targeted occupations and knowing the difficulty with the various terms and lack of consistency used all over Europe, the partnership was aware that there was no perfect or ideal list of occupations but it was decided through the consultation process to use the following:

List of occupations:				
11	Professional athletes and players		Sport coaches	
*	Outdoor activity leaders and animators	$\vdash$	Fitness instructors and personal trainers	
	Sport officials (e.g. referees)		Senior management staff (e.g. CEO)	
	Middle management staff (e.g. assistant managers, sport administrators)		Operational staff (e.g. lifeguards, greenkeepers, maintenance staff)	
	Clerical and office staff (e.g. secretaries)			

### 7.4 DISSEMINATION OF THE SURVEY

Once tested, revised and finalised in English, the online questionnaire was then translated into 19 other languages thanks to the commitment of the ESSA-Sport national partners. This step was extremely important to reduce the language barrier and create the conditions to get a higher number of contributions from the sector.



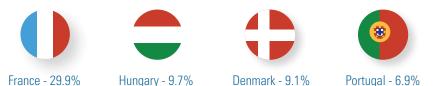
The online survey was then widely dispatched and promoted all over Europe using all possible communication channels (e.g. emails, newsletters, social media, websites, conferences, meetings, articles) with the goal to reach a maximum of stakeholders at the European, national, regional and local levels.

Stakeholders including national members and partners, European network organisations, European sport federations, national contacts, Member states and individual experts were all actively involved in the dissemination and promotion of the online survey at all levels with the goal to implement a cascade process to gather a maximum of employer views and contributions on the realities and challenges facing the sector.

### 7.5 TOTAL NUMBER OF RESPONSES

The online survey was launched in November 2018 and ended on 25th of January 2019 with a total of 3 812 valid responses collated, with all 28 nations in the European Union represented.

The five countries with the highest response rates (in terms of percentage of total responses to the survey) were:



It is important to note that unfortunately, despite the dispatch of several reminders, some countries in Europe with a large sport labour market had a response rate that was not in proportion to the overall size of the sport labour market for that country. The survey was most successful where it was supported by main national sport organisations such as the national sport ministry, the national Olympic committee, and/or sport federations.

Poland - 6%

# 7.6 ABOUT THE RESPONDENT ORGANISATIONS

### 7.6.1 Types of respondent organisations

The top five percentages of responses through the Employer Skills Survey came from:





19.7%







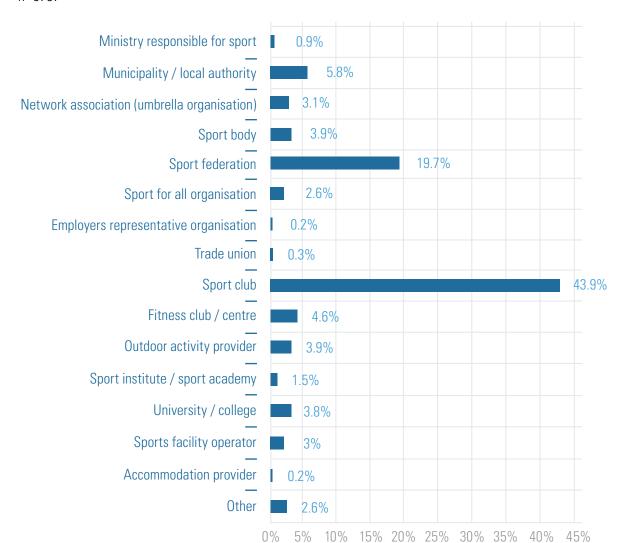
Municipality/Local Authority
5.8%

Fitness Club/ Centre 4.6%

Outdoor activity provider **3.9%** 

### Types of respondent organisations

n=3797



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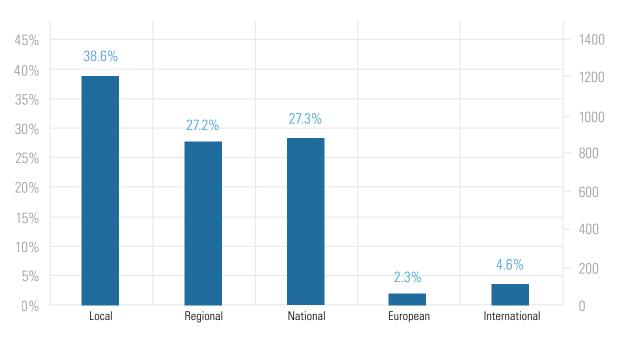
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38.6% of the sport employers who took part in the survey reported the geographical scope of their organisations as being 'Local'. Most of the remainder were split evenly between 'Regional' (27.2%) and 'National' (27.3%) scope with a small number describing themselves as 'European' or 'International'.

### **Geographical coverage of respondent organisations**

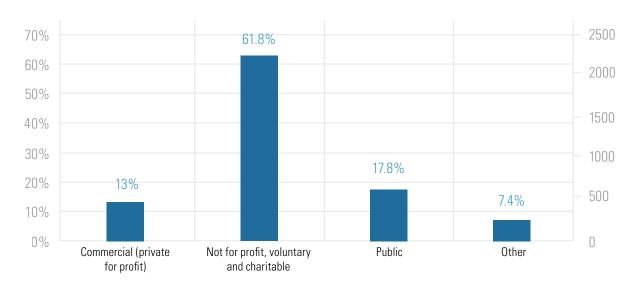
n = 3033



Concerning the status of the sport organisations taking part in the survey, a large majority of respondents indicated to be 'Not for Profit, Voluntary and Charitable' (61.8%). The second most represented category was 'Public' organisations with 17.8% of the respondents and 'commercial (private for profit)' represented 13% of the sample.

#### **Status of respondent organisations**

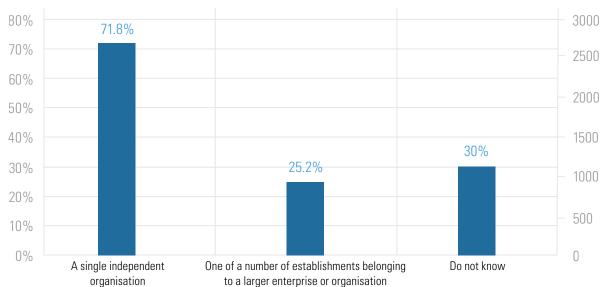
n = 3728



71.7% of the respondents described their organisation as 'Single, independent organisation' and 25.2% as 'One of a number of establishments belonging to a larger enterprise or organisation'.

# Single independent organisation or one of a number of establishments belonging to a larger enterprise or organisation

n=3711

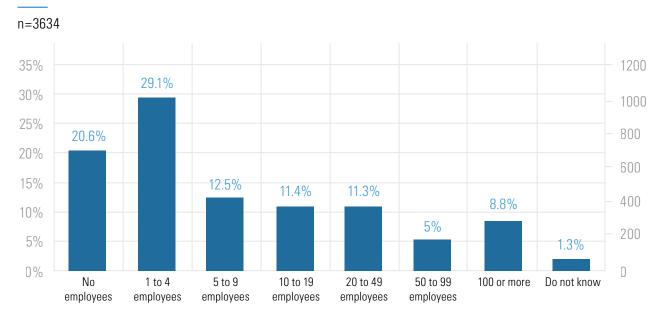




#### 7.7.1 Size of the respondent organisations by number of employees and growth tendencies.

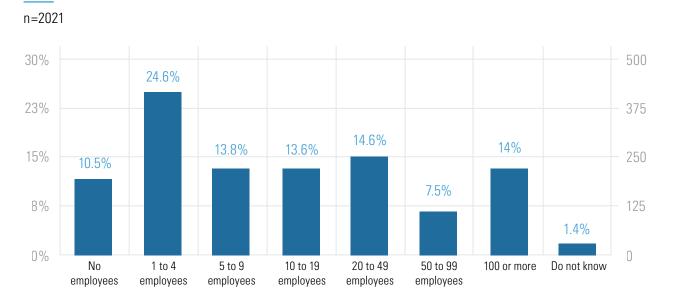
The largest proportion of responding organisations employed between 1 to 4 paid employees (29.1%). The next highest (20.6%) employed no paid workers at all which means that 49.7% of sport employers who took part in the survey had less than 5 paid employees. Only 8.8% employed more than 100 paid employees.

### Number of paid employees employed on average in a typical year



From the figure below it can be seen when Sports Clubs are excluded from the analysis, we still find a similar distribution of organisational sizes. However, the percentage of 'No employees' falls from 20.6% to 10.5% and those '1 to 4 employees' goes down from nearly 30% to 24.6%.

#### Number of paid employees employed on average in a typical year, sports clubs excluded



### Compared to 12 months ago, would you say that the numer of people employed in your organisation has...

n=3524

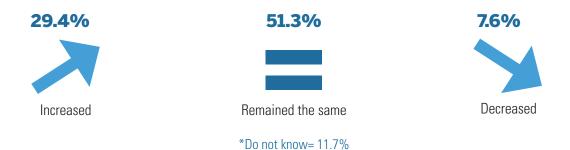


\*Do not know= 3.9%

Looking at the forecast, 80.7% of sport employers expect their organisation to remain the same (51.3%) or grow (29.4%) in the next two years. Only 7.6% forecast a reduction in the size of their workforce.

### How do you think the size of the workforce in your organisation will tend to change over the next 2 years?

n=3551



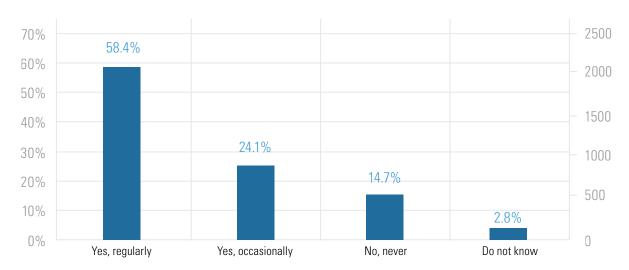
These responses on past and forecast growth correspond to the findings of the statistical analysis (Section 4) which

showed that the sport and physical activity sector grew steadily by 19.2% in the period from 2011 to 2018.

58.4% of respondents reported that they engaged the services of volunteers on a regular basis and 24.1% said they did so occasionally. Only 14.7% reported that they never engaged volunteers.

### Frequency of engagement of volunteers/ unpaid staff in a typical year

n = 3612



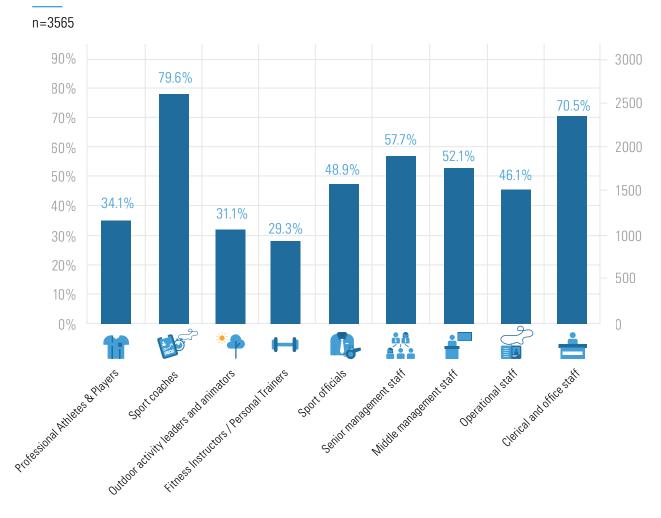
Due to the high response rate from Sports Clubs (who are more likely to make use of volunteers), these percentages should not necessarily be taken as typical of the sector as a whole. But when Sports Clubs are excluded from this analysis, those 'regularly' employing volunteers falls from 58.4% to 46.9% and those 'occasionally' rise from 24.1% to 27.3%. So even when Sports Club responses are put to one side, the value and importance of volunteers to the sector is very clear.



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By far the majority of respondents to the survey said they engaged Sport Coaches (79.6%). This was followed by Clerical and Office Staff (70.5%), Senior Management Staff (57.7%), Middle Managers (52.1%) and Sport Officials (48.9%). This analysis includes both paid employees and volunteers.

### Occupations engaged in respondents' organisations



Then, the survey asked respondents to indicate the type of contract for those engaged in their organisation and the situation can be found in the graph on the next page.

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### Percentage of sport employers who engage each occupation by type of contract

n=3565 65.1% 33.4% 20.3% Paid staff Self-employed Athletes & Players 61.6% 47.3% 27.9% Paid staff Sport coaches Self-employed 60.1% 32.6% 30.5% Paid staff Outdoor activity Self-employed leaders & animators 48.8% 37.1% 36.7% Paid staff Self-employed Fitness instructors/ Personal trainers 74.9% 22.2% 14.5% Sport officials Self-employed 61.3% 39.8%

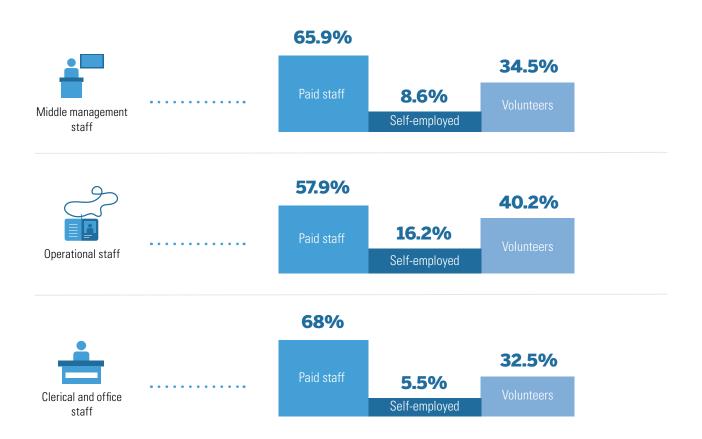
Paid staff

Senior management

staff

6.4%

Self-employed



Amongst the respondent organisations, some employers who engage 'Professional Athletes and Players' reported them as being volunteers. This is a contradiction in terms which was generated by an error in the questionnaire design. Clearly, 'Professional' athletes and players cannot be volunteers.

In the full survey, 68% of employers who engaged staff in the role of Clerical and Office Staff engaged them on a paid contract, while the corresponding percentage for Middle Management Staff is 65.9%, Sport Coach 61.6%, Senior Management Staff 61.3% and Operational Staff 57.9%.

When we exclude Sports Clubs, we find that 86.1% of employers who engage Clerical and Office Staff engage them on a paid contract, while the corresponding percentage for Middle Management Staff is 81.2%, Senior Management Staff 79.6%, Operational Staff 71.2% and Sport Coaches 65.5%.

Overall, the highest percentage of employers who engage people in the listed sport occupations in a volunteer role is for Sport Officials (74.9%).

The high percentage of employers who engage volunteer Outdoor Activity Leaders and Animators (60.1%) probably results from the high number of Sports Clubs in the survey with their greater reliance on volunteer labour. When we analyse the figures only for organisations whose main purpose is Outdoor Activity Provider, we find that 67% of employers engage paid Outdoor Activity Leaders and Animators while 51.5% of employers engage self-employed staff and only 17% engage volunteers.

Much the same applies to the Fitness Industry. When we analyse the responses only from Fitness Clubs and Centres, we find that 79.6% of employers engage Fitness Instructors / Personal Trainers on a paid contract basis while 43.8% engage self-employed staff and only 10.9% engage volunteers.

# 7.8 ANALYSIS OF SKILL REQUIREMENTS FOR EIGHT OCCUPATIONS

The following subsections cover an analysis of the skill needs for the following eight occupations:				
1 - Sport coaches	5 - Senior management staff			
2 - Outdoor activity leaders and animators	6 - Middle management staff			
3 - Fitness instructors and personal trainers	7 - Operational staff			
4 - Sport officials	8 - Clerical and office staff			

In each subsection there are three graphs. The first graph provides a list of skills and attributes relevant to the occupation and the level of importance which the respondents attached to each.

The second graph shows the same list of skills/attributes and percentage of respondents who felt these skills/attributes were weak or in need of improvement.

The third graph attempts to balance the other two by showing those skills and attributes which were judged to be most important when multiplied by the percentage level of weakness or in need of improvement. The third graph is necessary to show where the real training priorities lie. Some skills/attributes are shown as very weak or in need of improvement, but they are judged by the respondents as not important. There would be little point in prioritising training activities for these. It is more effective to concentrate on those which have a high level of importance and judged to be weak or in need of improvement.

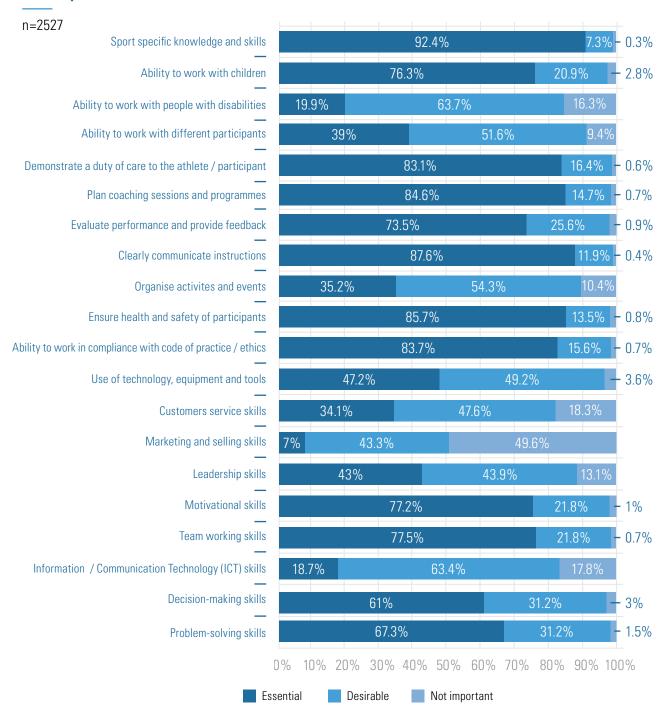




### 7.8.1 Occupation 1: Sport Coach

Sport Coach: Skills and attributes by level of importance

#### Most important skills and attributes needed for a SPORT COACH



Respondents to the survey underlined the following 5 most important skills and attributes needed for a Sport Coach:

- 1 Sport specific knowledge and skills
- 2 Clearly communicate instructions

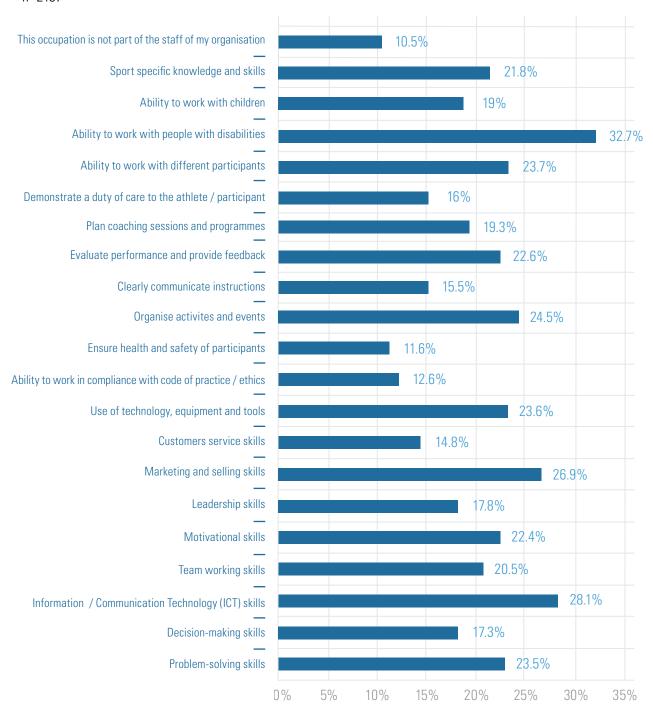
- 3 Ensure health and safety of participants
- 4 Plan coaching sessions and programmes
- 5 Ability to work in compliance of codes of practice/ethics



Sport Coach: Skills and attributes as levels of weakness or in need of improvement

#### SPORT COACH: Skills regarded as weak or in need of improvement

n = 2137



Respondents to the survey underlined the following 5 weakest skills and attributes for a Sport Coach:

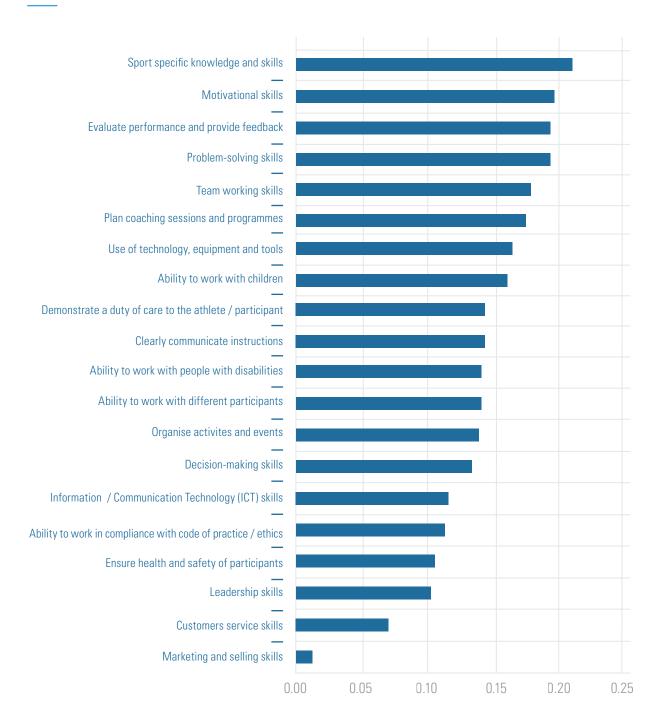
- 1 Ability to work with people with disabilities
- 2 Information/Communication Technology (ICT) skills
- 3 Marketing and selling skills

- 4 Organise activities and events
- 5 Ability to work with different participants



Sport Coach: Skills and attributes as Training Priorities

### **Training priorities for sport coaches**



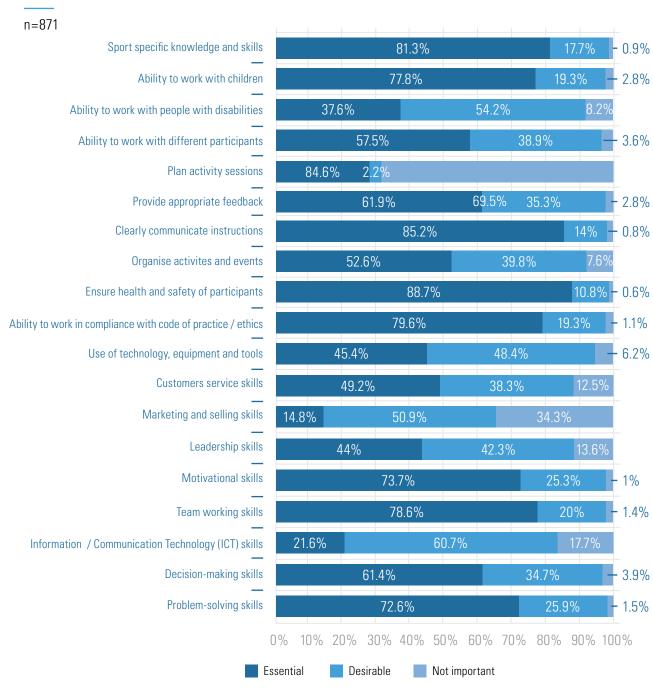


# **OUTDOOR ACTIVITY LEADER AND ANIMATOR**

### 7.8.2 Occupation 2: Outdoor Activity Leader and Animator

Outdoor Activity Leader and Animator: Skills and attributes by level of importance

### Most important skills and attributes needed for an OUTDOOR ACTIVITY LEADER AND ANIMATOR



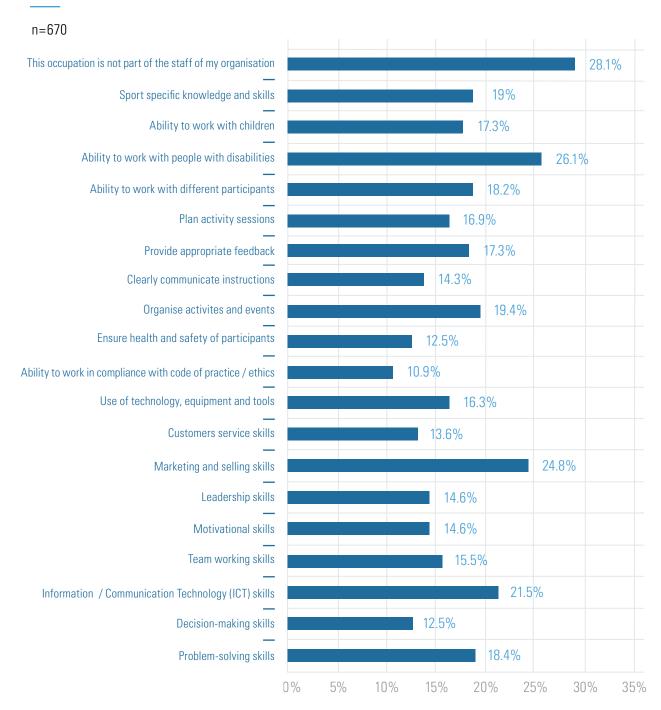
Respondents to the survey underlined the following 5 most important skills and attributes needed for an Outdoor Activity Leader and Animator:

- 1 Ensure health and safety of participants
- 2 Clearly communicate instructions
- 3 Sport/activity specific technical knowledge and skills
- 4 Ability to work in compliance with codes of practice/ethics
- 5 Team working skills

# **OUTDOOR ACTIVITY LEADER AND ANIMATOR**

Outdoor Activity Leader and Animator: Skills and attributes by weakness or in need of improvement

### OUTDOOR ACTIVITY LEADER AND ANIMATOR: Skills regarded as weak or in need of improvement



Respondents to the survey underlined the following 5 weakest skills and attributes for an Outdoor Activity Leader and Animator:

- 1 Ability to work with people with disabilities
- 2 Marketing and selling skills

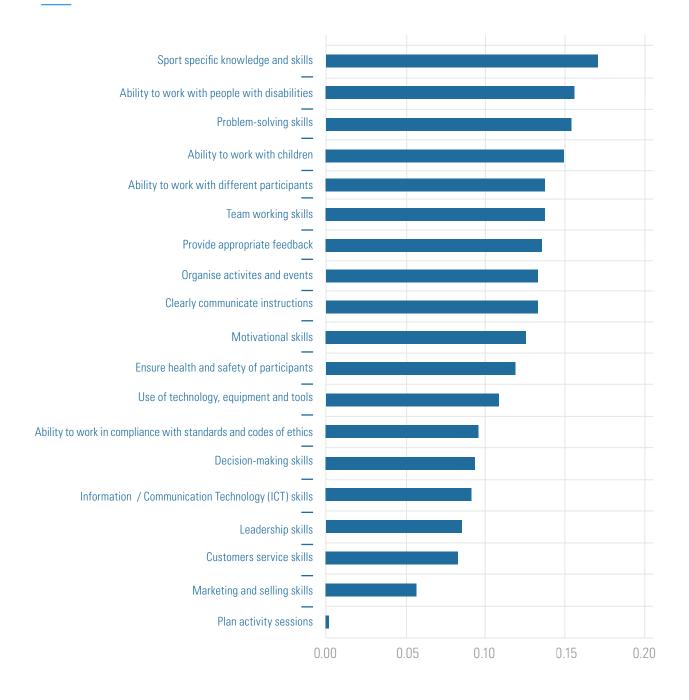
- 3 Information/Communication Technology (ICT) skills
- 4 Organise activities and events
- 5 Sport/activity specific technical knowledge and skills



# **OUTDOOR ACTIVITY LEADER AND ANIMATOR**

Outdoor Activity Leader and Animator: Skills and Attributes as Training Priorities

### Training priorities for outdoor activity leaders and animators





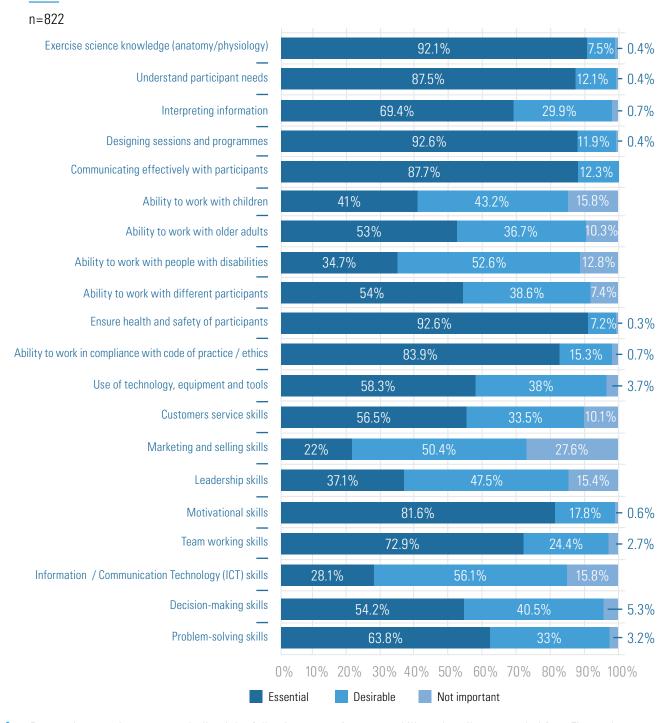


# FITNESS INSTRUCTOR / PERSONAL TRAINER

### 7.8.3 Occupation 3: Fitness Instructor / Personal Trainer

Fitness Instructor / Personal Trainer: Skills and Attributes by level of importance

### Most important skills and attributes needed for a FITNESS INSTRUCTOR/ PERSONAL TRAINER



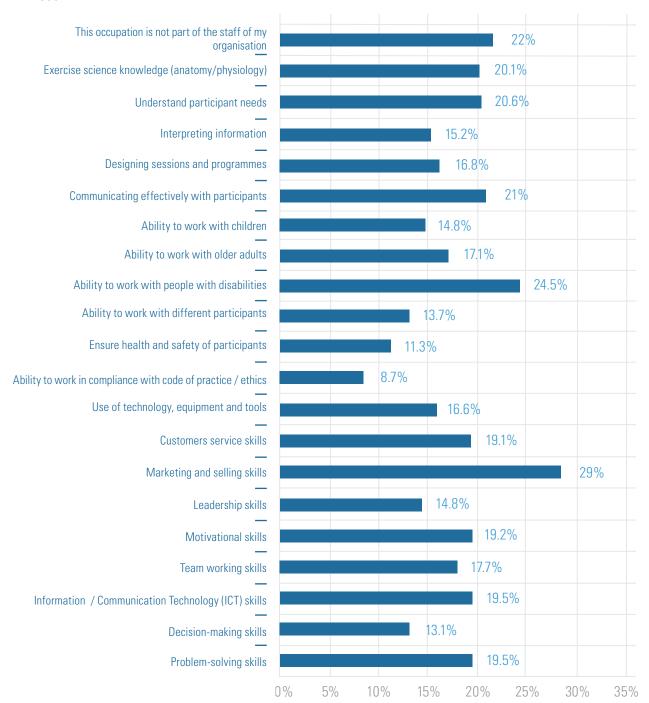
Respondents to the survey underlined the following 5 most important skills and attributes needed for a Fitness Instructor / Personal Trainer:

- 1 Ensure health and safety of participants
- 4 Designing sessions and programmes
- 2 Exercise science knowledge (anatomy / physiology)
- 5 Understand participant needs
- 3 Communicating effectively with participants

Fitness Instructor / Personal Trainer by level of weakness or in need of improvement

### FITNESS INSTRUCTOR/ PERSONAL TRAINER: Skills regarded as weak or in need of improvement

n = 656



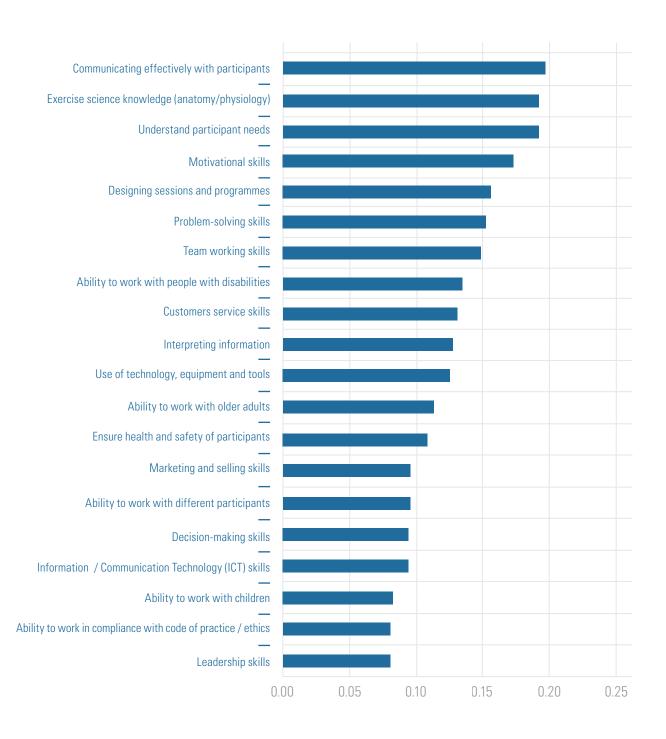
Respondents to the survey underlined the following 5 weakest skills and attributes for a Fitness Instructor / Personal Trainer:

- 1 Marketing and selling skills
- 2 Ability to work with people with disabilities
- 3 Communicating effectively with participants
- 4 Understand participant needs
- 5 Exercise science knowledge

# FITNESS INSTRUCTOR / PERSONAL TRAINER

Fitness Instructor / Personal Trainer: Skills and attributes as Training Priorities

### **Training priorities for fitness instructors**



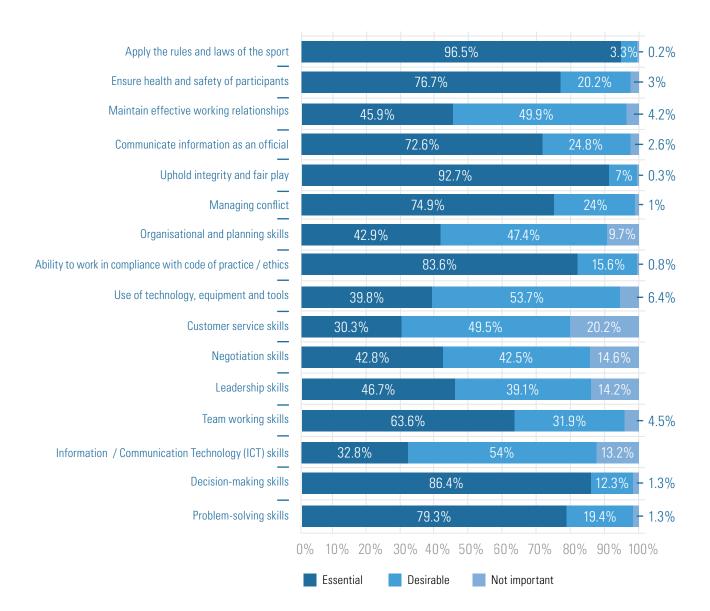


### 7.8.4 Occupation 4: Sport Official (e.g. referee, judge)

Sport Official: Skills and attributes by level of importance

### Most important skills and attributes needed for a SPORT OFFICIAL

n=1151



Respondents to the survey underlined the following 5 most important skills and attributes needed for a Sport Official:

- 1 Apply the rules and laws of the sport
- 2 Uphold integrity and fair play
- 3 Decision-making skills

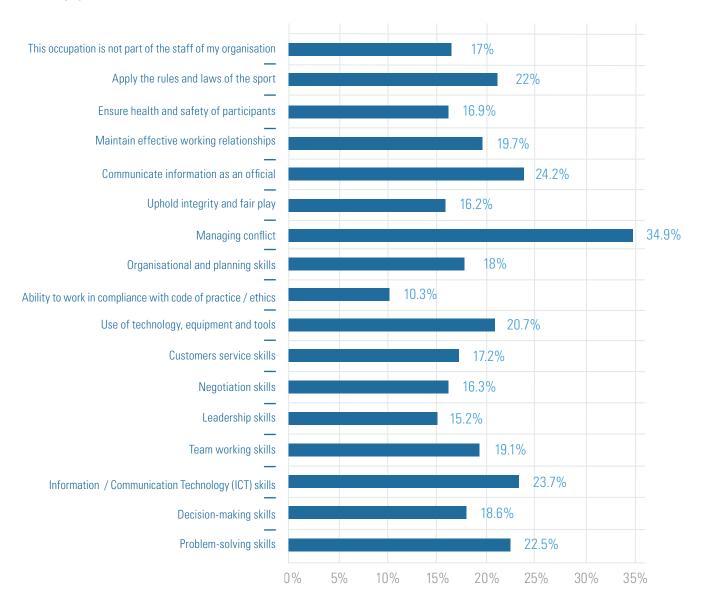
- 4 Ability to work in compliance with codes of practice/ethics
- 5 Problem-solving skills



Sports Official: Skills and attributes by level of weakness or need of improvement

### SPORT OFFICIAL: Skills regarded as weak or in need of improvement

n = 925



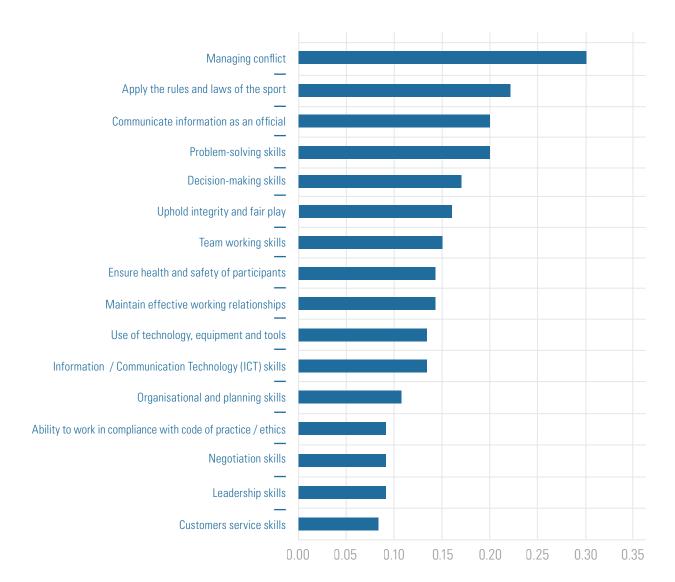
Respondents to the survey underlined the following 5 weakest skills and attributes for a Sport Official:

- 1 Managing conflict
- 2 Communicate information as an official
- 3 Information/Communication Technology (ICT) skills
- 4 Problem-solving skills
- 5 Apply the rules and laws of the sport



Sport Official: Skills and attributes as Training Priorities

### **Training priorities for sport officials**



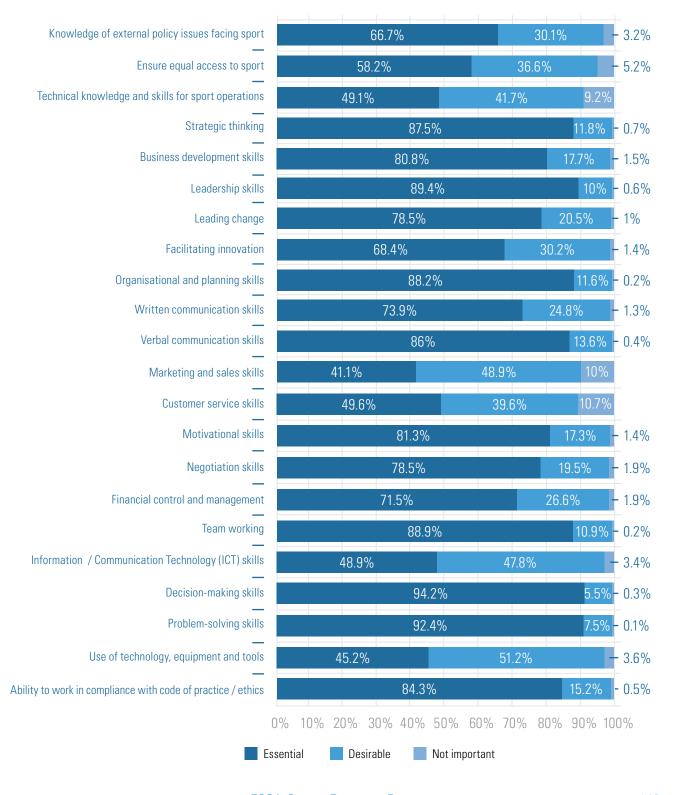


### 7.8.5 Occupation 5: Senior Management Staff

Senior Management Staff: Skills and attributes by level of importance

### Most important skills and attributes needed for SENIOR MANAGEMENT STAFF

n=1693





Respondents to the survey underlined the following 5 most important skills and attributes needed for a Senior Management Staff:

- 1 Decision-making skills
- 2 Problem-solving skills
- 3 Team working

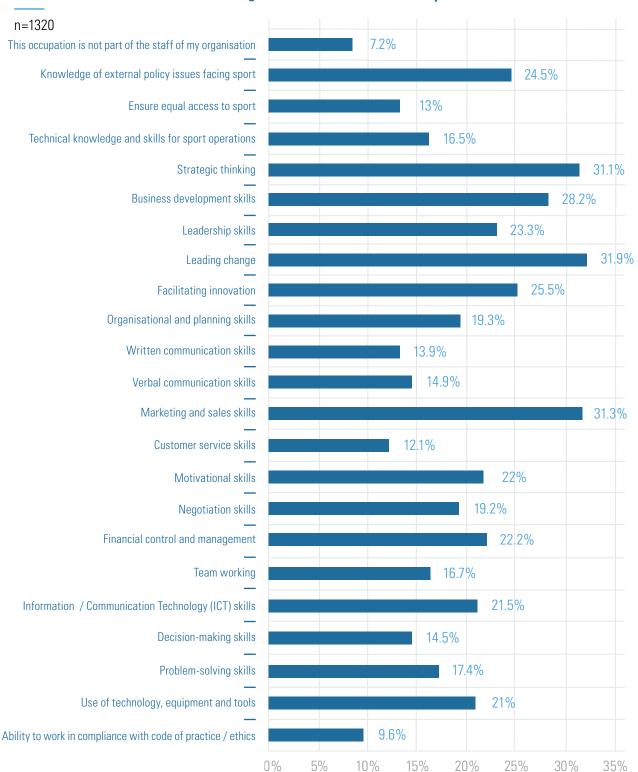
- 4 Leadership skills
- 5 Organisational and planning skills





Senior Management Staff: Skills and Attributes by Level of Weakness or in need of improvement

#### SENIOR MANAGEMENT STAFF: Skills regarded as weak or in need of improvement



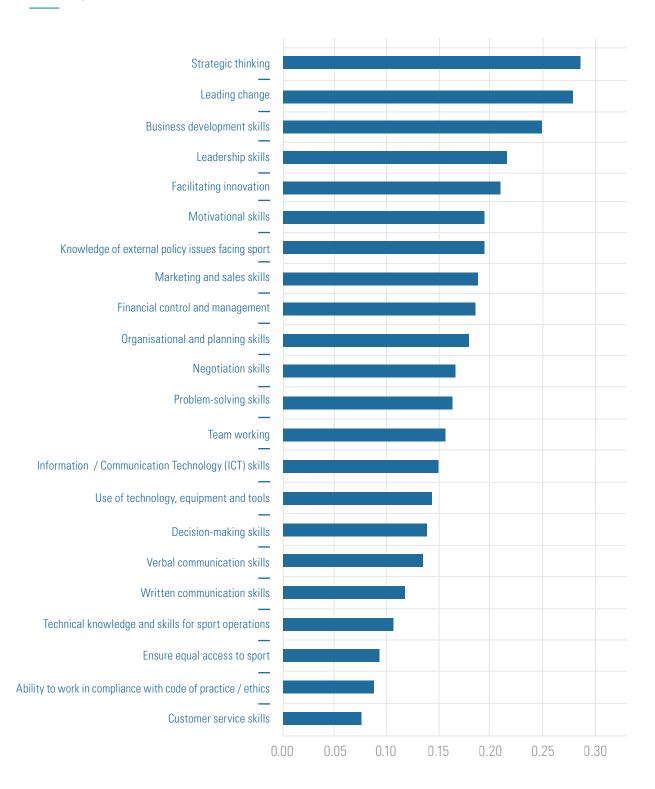
Respondents to the survey underlined the following 5 weakest skills and attributes for a Senior Management Staff:

- 1 Leading change
- 2 Marketing and sales skills
- 3 Strategic thinking

- 4 Business development skills
- 5 Facilitating innovation

Senior Management Staff: Skills and attributes as Training Priorities

### **Training priorities for senior management staff**



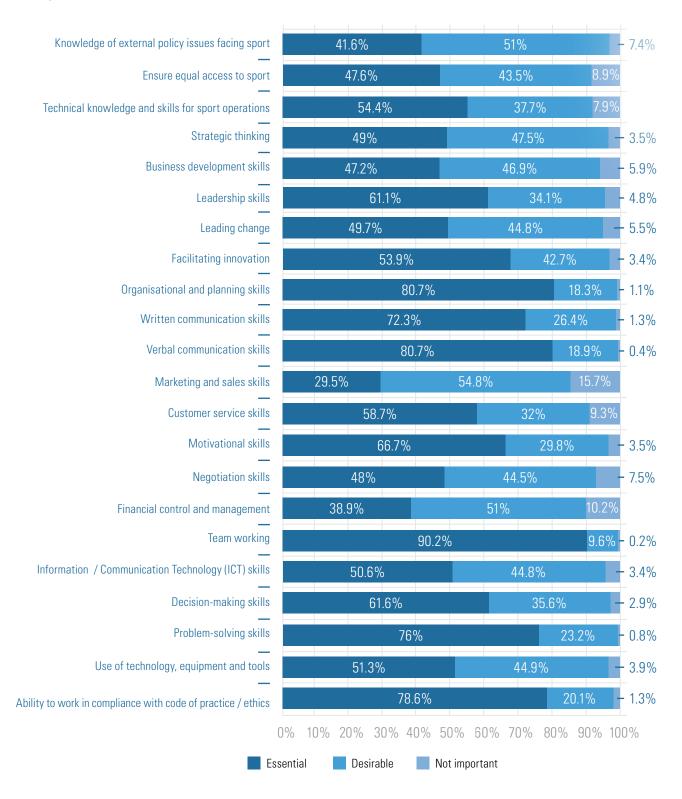
### **MIDDLE MANAGEMENT STAFF**

### 7.8.6 Occupation 6: Middle Management Staff

Middle Management Staff: Skills and attributes by level of importance

### Most important skills and attributes needed for MIDDLE MANAGEMENT STAFF

n = 1042



# **MIDDLE MANAGEMENT STAFF**

Respondents to the survey underlined the following 5 most important skills and attributes needed for a Middle Management Staff:

- 1 Team working
- 2 Verbal communication skills
- 3 Organisational and planning skills

- 4 Ability to work in compliance with codes of practice / ethics
- 5 Problem-solving skills

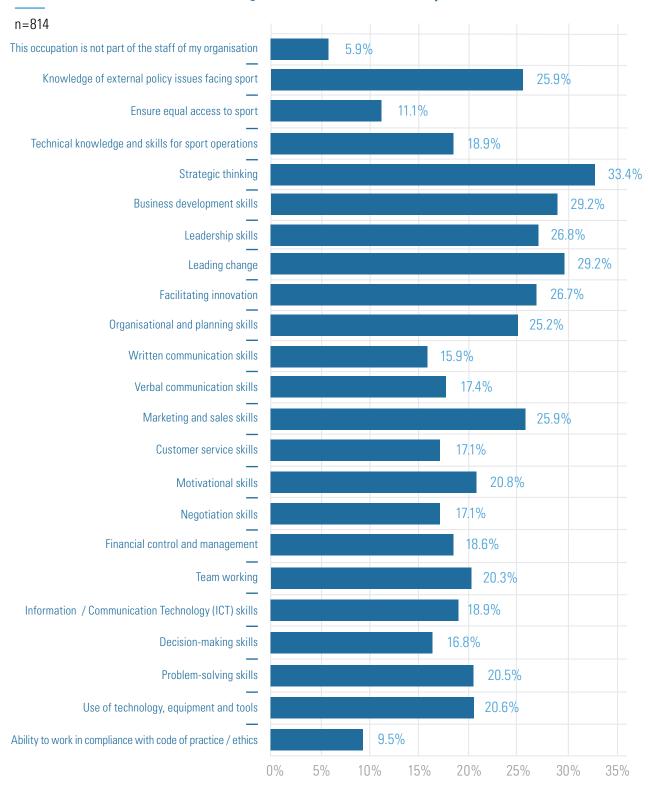




# **MIDDLE MANAGEMENT STAFF**

Middle Management Staff: Skills and attributes by level of weakness or in need of improvement

#### MIDDLE MANAGEMENT STAFF: Skills regarded as weak or in need of improvement



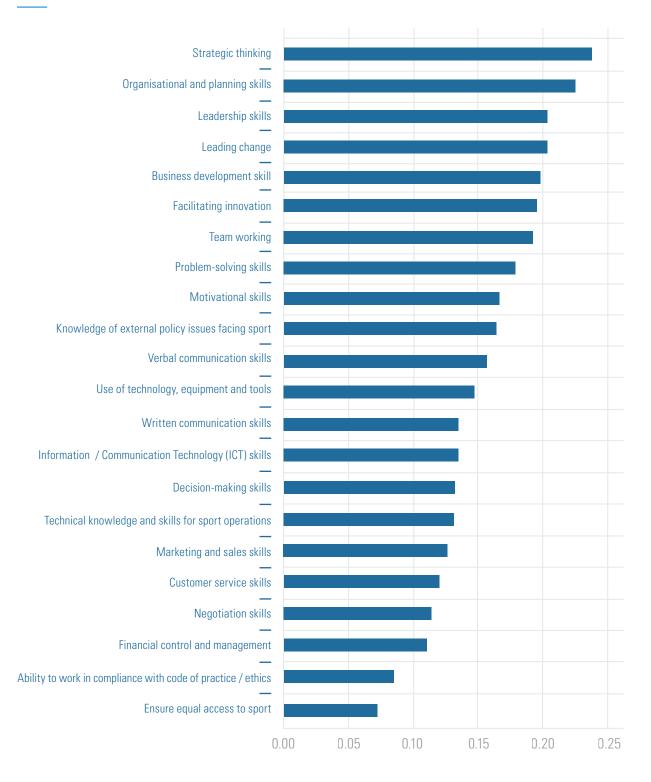
Respondents to the survey underlined the following 5 weakest skills and attributes for a Middle Management Staff:

- 1 Strategic thinking
- 3 Leading change
- 5 Facilitating innovation

- 2 Business development skills
- 4 Leadership skills
- ESSA-Sport European Report

Middle Management Staff: Skills and attributes as Training Priorities

# **Training priorities for middle management staff**



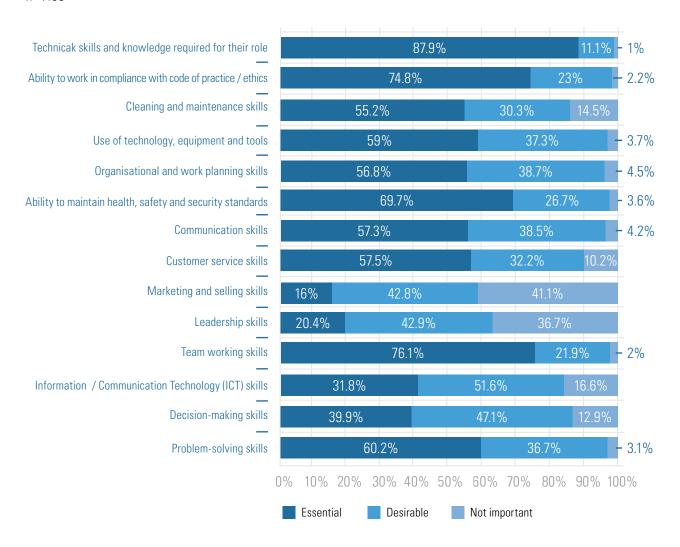


## 7.8.7 Occupation 7: Operational Staff

Operational Staff: Skills and attributes by level of importance

## Most important skills and attributes needed for OPERATIONAL STAFF

n=1139



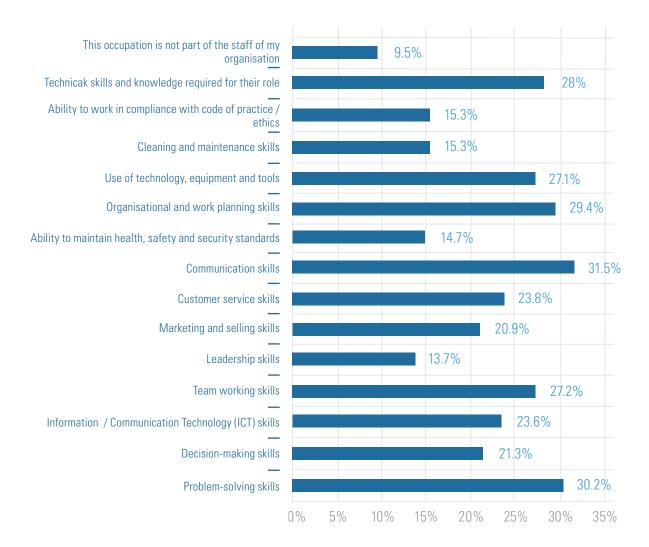
Respondents to the survey underlined the following 5 most important skills and attributes needed for an Operational Staff:

- 1 Technical skills and knowledge required for their role
- 2 Team working skills
- 3 Ability to work in compliance with codes of practice/ethics
- 4 Ability to maintain health, safety and security standards
- 5 Problem-solving skills

Operational Staff: Skills and attributes by level of weakness or in need of improvement

## **OPERATIONAL STAFF: Skills regarded as weak or in need of improvement**

n = 908



Respondents to the survey underlined the following 5 weakest skills and attributes for Operational Staff:

- 1 Communication skills
- 2 Problem-solving skills
- 3 Organisational and work planning skills
- 4 Technical skills and knowledge required for their role
- 5 Team working skills

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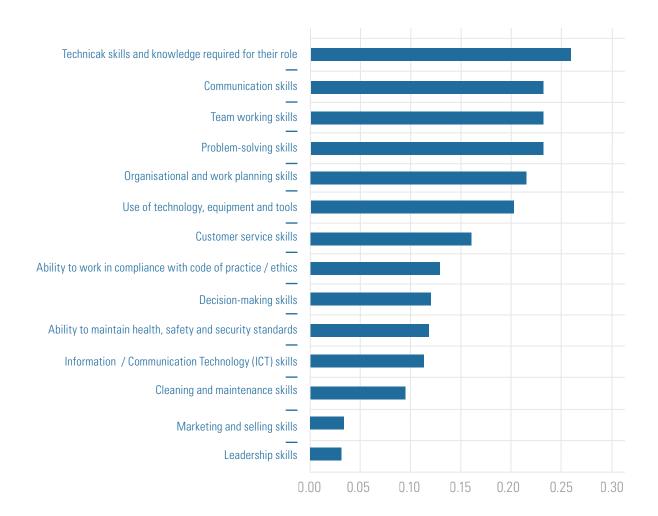
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Operational Staff: Skills and attributes as Training Priorities

# **Training priorities for operational staff**







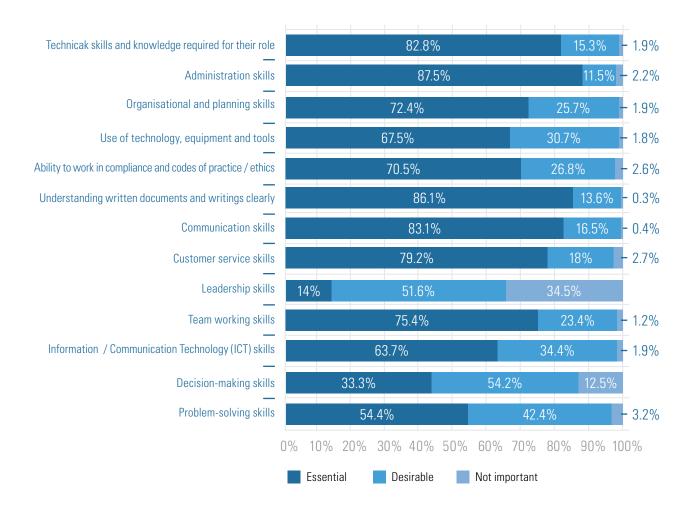
# **CLERICAL AND OFFICE STAFF**

# 7.8.8 Occupation 8: Clerical and Office Staff

Clerical and Office Staff: Skills and attributes by level of importance

#### Most important skills and attributes needed for CLERICAL AND OFFICE STAFF

n=1658



Respondents to the survey underlined the following 5 most important skills and attributes needed for a Clerical and Office Staff:

- 1 Administration skills
- 2 Understanding written documents and writing clearly
- 3 Communication skills

- 4 Technical skills and knowledge required for their role
- 5 Customer service skills

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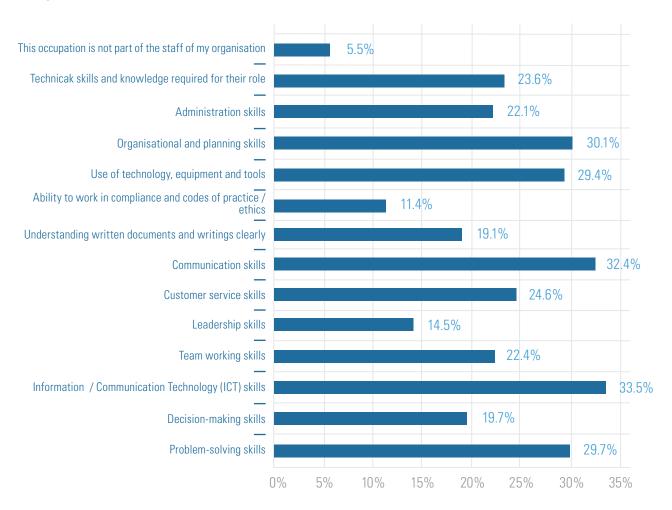


# **CLERICAL AND OFFICE STAFF**

Clerical and Office Staff: Skills and attributes by level of weakness or in need of improvement

#### **CLERICAL AND OFFIC STAFF: Skills regarded as weak or in need of improvement**

n=1291



Respondents to the survey underlined the following 5 weakest skills and attributes for a Clerical and Office Staff:

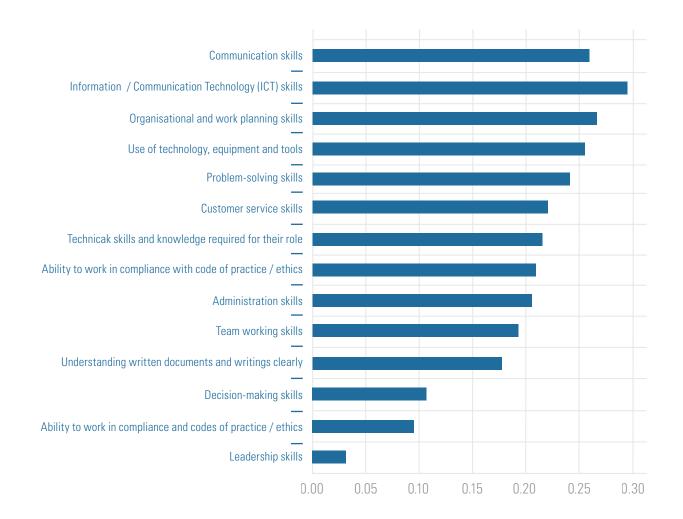
- 1 Information/Communication Technology (ICT) skills
- 2 Communication skills
- 3 Organisational and planning skills

- 4 Problem-solving skills
- 5 Use of technology, equipment and tools

# **CLERICAL AND OFFICE STAFF**

Clerical and Office Staff: Skills and attributes as Training Priorities

# Training priorities for clerical and office staff





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# 7.9 EXPECTATIONS AND SKILLS OF VOLUNTEERS

Given the high numbers of volunteers active in the sector, it was important to find out whether respondents expected the same or less of the volunteer cohort in terms of skills.

Generally, the number of respondents who said they expected the same of volunteers and paid staff for each occupation was roughly equal to those who said they did not.

The exceptions were for Sport Officials (69% same and 31% less), Outdoor Activity Leaders and Animators (59.6 % the same and 40.4% less) and Sport Coaches (56% the same 44% less) for which a high percentage of respondents indicated to expect the same of the volunteer cohort.

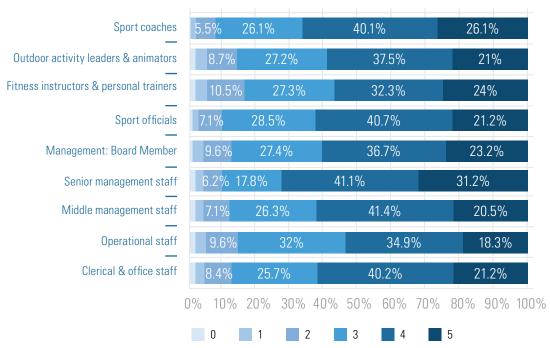
## Do organisations have same expectations of volunteers and paid staff in the following roles?



When it comes to the skills of volunteers, respondents tended to rate them highly.

## Rating of the skills of VOLUNTEERS in relation to what is required to perform their role

n=2390



In all cases and for each of the listed occupations the majority of respondents rated volunteer skills as either 4 or 5 (on a scale where 0 is the lowest and 5 the highest) so at a high level.

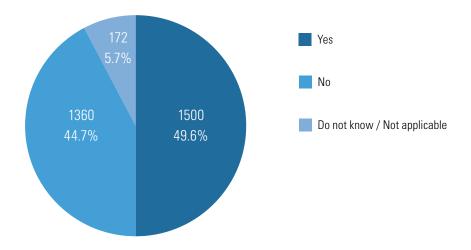
# 7.10 RECRUITMENT AND RETENTION OF PAID STAFF AND VOLUNTEERS

# 7.10.1 Recruitment in the previous 12 months

50% of respondents had recruited or attempted to recruit a paid employee in the past 12 months.

# Has your organisation recruited or attempted to recruit a paid employee in the past 12 months?

n = 3042



The top five paid jobs being recruited for were:



Sport coach **67.1%** 



Clerical and office staff **40%** 



Middle management **28.1%** 



Operational staff **26.8%** 

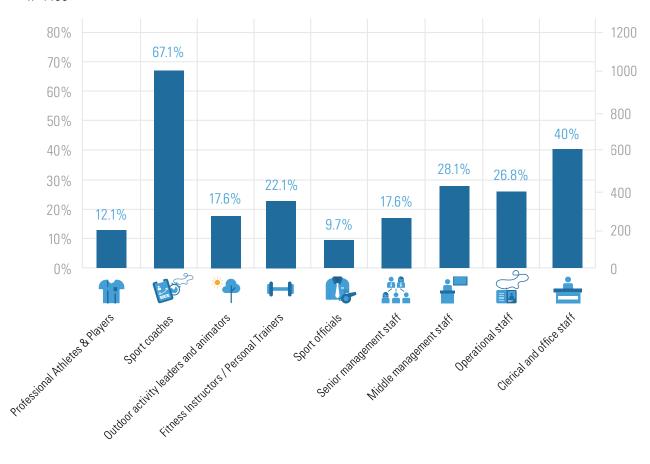


Fitness instructors / Personal trainers **22.1%** 



# If yes, could you please indicate for which occupation(s)/role(s)

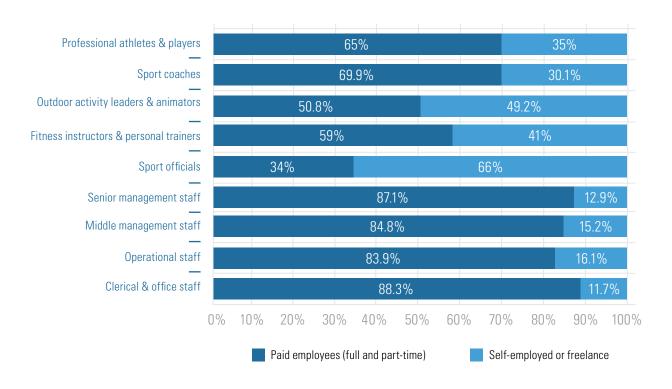
n=1458





## Breakdown of type of contract for newly recruited staff

n=1458



The majority of the paid posts being hired for were 'paid employees' (meaning in this case on employment contracts as opposed to freelance) with the exception of Sport Officials (66% freelance, 34% paid).



The top five difficult-to-fill vacancies for paid staff follow a similar pattern to the occupations being recruited for.

Thus, there were difficulties expressed by respondents to recruit paid staff for:







Clerical and office staff **27.4%** 



Operational staff 23.9%



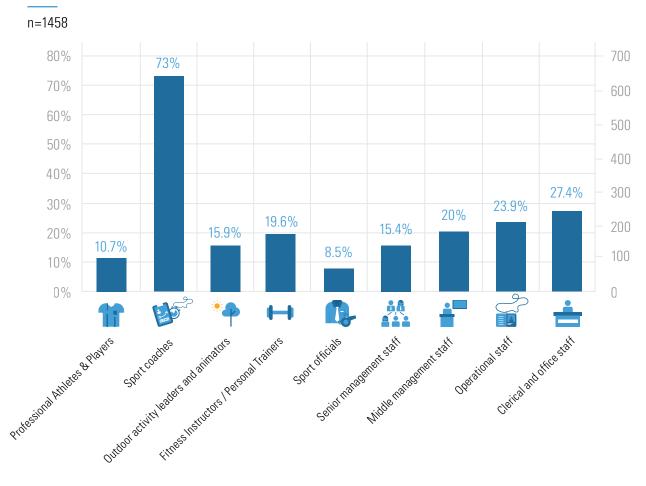
Middle management **20%** 



Fitness instructors / Personal trainers 19.6%

By far, the most difficult occupations to recruit underlined by sport employers through the survey seems to be Sport Coach.

# Occupations where there has been a difficulty recruiting paid staff



Respondents encountering recruitment difficulties were asked to explain the main issues and challenges.

The top five reported recruitment difficulties for paid staff were:

45.6%

Low number of applicants with required skills

44.1%

Unattractive terms and conditions (including wage) offered for the Post 38.7%

Low number of applicants with the required attitude and motivation

22.3%

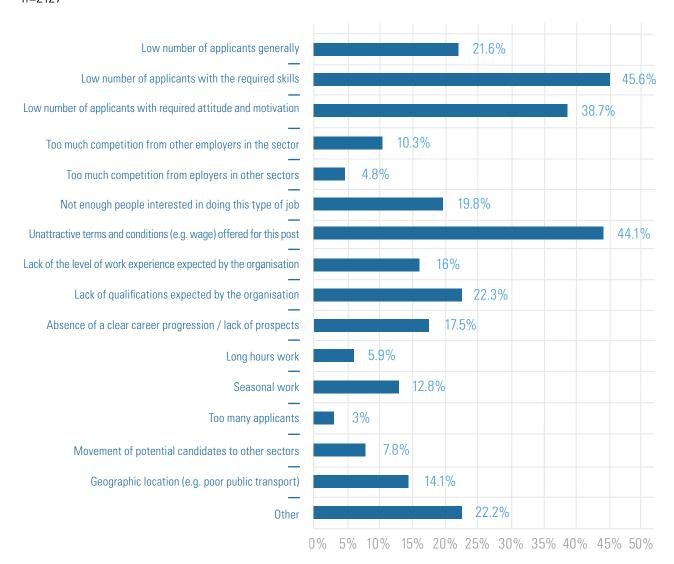
Lack of Qualifications
Expected by the
Organisation

21.6%

Low number of applicants generally

#### Main causes of difficulty in recruitment

n=2127



When it comes to retention of paid staff, the pattern is similar for occupations being recruited for and difficult-to-fill vacancies.

The paid jobs with the highest retention difficulties underlined by respondents to the survey were:



Sport coach **65.9%** 



Clerical and office staff **27.1%** 



Operational staff **25.4%** 



Middle management **20.5%** 

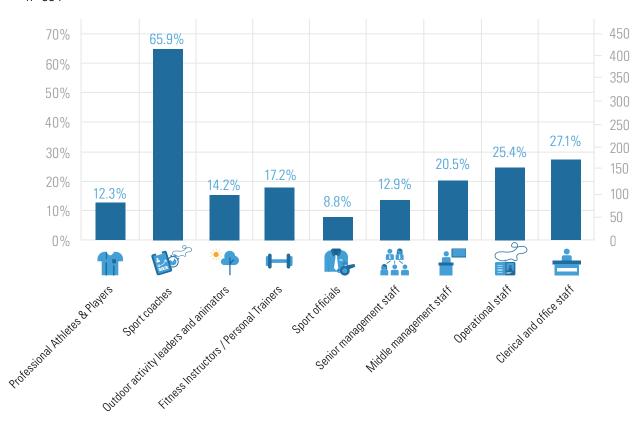


Fitness instructors / Personal trainers

17.2%

# Occupations where there has been a difficulty retaining paid staff

n = 634



The main reasons for retention difficulties expressed by sport employers for paid staff were:



Better pay by other organisations

43.8%



Lack of career progression/pathways



Better pay offered in other job roles **27.6%** 



Lack of Financial Stability in Organisation



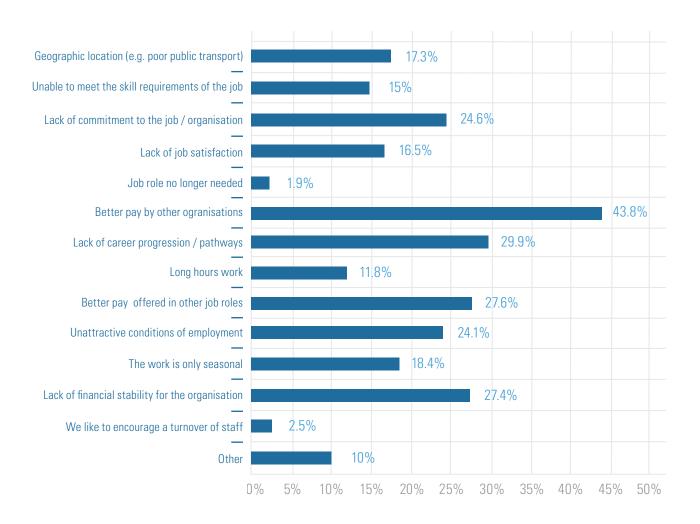


Lack of commitment to the job

24.6%

## Main reasons for difficulties in maintaining paid staff

n = 642

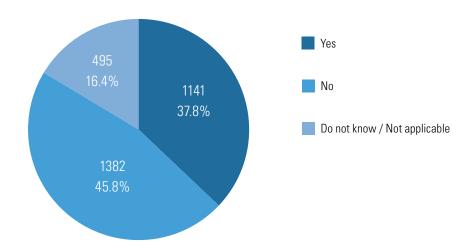




A total of 37.8% of respondents reported problems engaging volunteers.

# Organisations reporting problems recruiting volunteers

n=3018



When asking for which occupations, the five most difficult to fill volunteer vacancies were:



61.1%



Sport coach 52.9%



Sport officials 49.7%



Clerical and office staff 27.1%

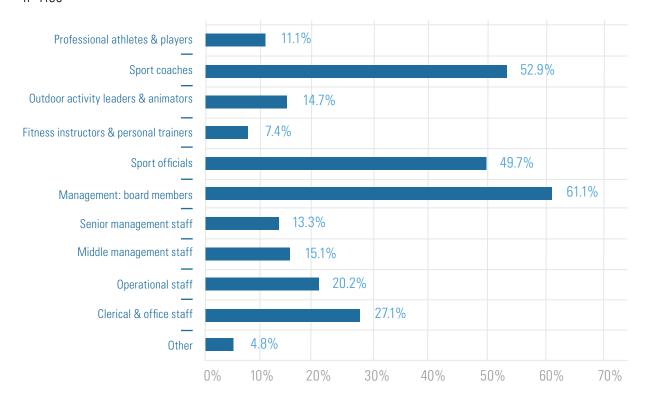


Operational staff 20.2%



# Occupations where there are difficulties recruiting volunteers

n=1130





# 7.11 KEY ISSUES WORKING IN SPORT AND PHYSICAL ACTIVITY

A list of 27 statements were presented to respondents who were asked to indicate their level of agreement with each of them.

The next table shows the statements and the percentage of respondents who said they either 'Agree' or 'Strongly Agree'.

The statements are listed in order of their level of support.

	Statement	Agree or strongly agree
1.	It is important that your staff have access to on-going training to keep their skills up-to-date.	91.5%
2.	Effective governance is important to your organisation.	89.5%
3.	More effort is needed to make sport and physical activity more inclusive in attracting participants.	83.7%
4.	Universities/training providers should work more closely with organisations like yours.	79.9%
5.	Improving governance should be a priority for all organisations.	79.9%
6.	The sector is changing and evolving, as a result of the skills needed by those working in the sector will change too.	79%
7.	Sports organisations have become more professional in recent years.	77.6%
8.	New training courses are required to meet the training needs of organisations like yours.	72%
9.	You find your staff are willing to train and develop themselves	71.8%
10.	The workforce of paid staff and volunteers in the sport and physical activity sector needs to be inclusive.	71.6%
11.	The skills required in our organisation are changing.	70.9%
12.	In the future there will be a demand for a better qualified workforce operating in sport organisations like yours.	66.8%
13.	Past experience is more important than qualifications when recruiting volunteers.	63.1%

	Statement	Agree or strongly agree
14.	Expectations and priorities from national government are causing our organisation to change.	62%
15.	Attitude and personality are more important than qualifications when recruiting paid staff.	61.1%
16.	It is difficult to find and recruit people with the right skills to work in your organisation as a volunteer.	60.9%
17.	Expectations and priorities from national government on sport organisations is increasing.	60.8%
18.	Our staff would benefit from learning experiences in other countries.	56.9%
19.	Work experience is more important than qualifications when recruiting paid staff.	56.8%
20.	It is not easy to progress from a technical role (e.g. as coach or instructor) to a management position.	51.1%
21.	Our expectations of volunteers are as high as paid staff when they perform the same role.	48.8%
22.	There is a clear pathway for someone to gain employment in to organisations like yours and clear pathways for progression.	48.2%
23.	Volunteers do NOT need the same level of qualifications to perform their roles as paid staff.	45.5%
24.	Customer service is poor in sport and physical activity facilities and clubs.	44.9%
25.	It is difficult to find relevant continuing professional development (CPD) courses for your staff.	44.6%
26.	It is difficult to recruit people from other EU countries because their qualifications are not easily understood or transferable.	32.4% (43% said they did not know)
27.	It is easy to find and recruit people with the right skills to work in your organisation as paid staff.	31.1%

# 7.12 WORKFORCE DEVELOPMENT AND TRAINING

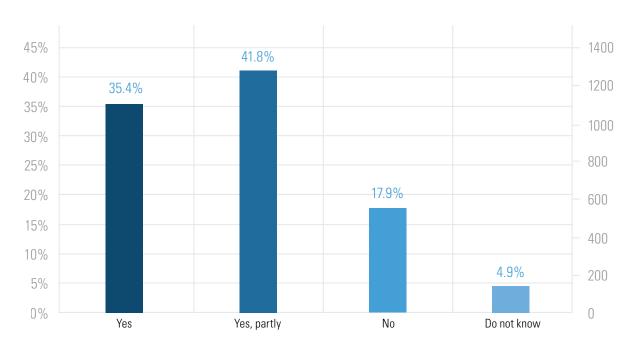
Respondents were asked to provide information about the review of the skills and training needs of their staff team.

#### Main findings:

- 🕸 35.4% of respondents said that they regularly reviewed the skills and training needs of their staff team
- \$\text{41.8% reported that they did so 'partly'}
- \$\text{2} 17.9% reported they did not

## Organisations reporting regular review of skills and training needs of staff

#### n=2901



The following top 5 barriers were identified by respondents to arranging training for the workforce of their organisation:



training **48.5%** 

Training is too expensive

46.2%



The courses of interest are not available locally

39.8%



External courses are too expensive

38.8%



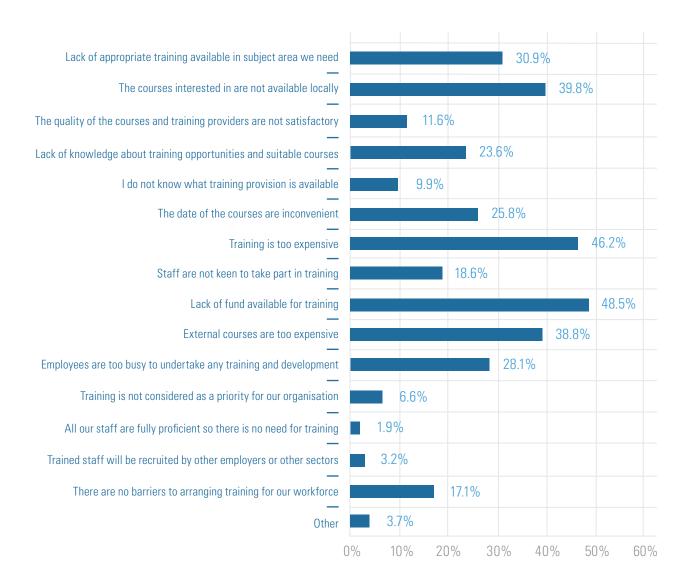
Employees are too busy to undertake any training and development

28.1%

It is notable that three of the five top responses refer to financial constraints to explain difficulties in arranging training.

## Main barriers to training of respondents' workforce

n=2758



Conclusions and recommendations arising from the survey results can be found in sections 9 and 10 of this report.

B



# 8.1 CONSULTATION WITH EUROPEAN STAKEHOLDERS

Key organisations from the European sport and physical activity sector are partners in the ESSA-Sport project and have been closely involved throughout the development and implementation of the work programme.

They have contributed to the research protocol, the design and testing of the online survey, promoted the research, and helped to analyse, present and disseminate the results.

The European sport organisations involved in the partnership of the ESSA-Sport project are:

- Uni-Europa
- 🕸 IHRSA The International Health, Racquet & Sportsclub Association
- S ENOS European Network of Outdoor Sports

In addition, ESSA-Sport provided the opportunity to set up a specific consultation group of European Sport Networks which met three times during the project through the organisation of European Workshops entitled "Skills and workforce development challenges in the sport and physical activity sector". The group was composed of a total of 14 European networks / umbrella organisations from the full breadth of the sector identified as the EU Expert Advisory Board in the project and these organisations were involved and consulted at points of strategic importance in the project. The EU Expert Advisory Board were involved in the desk research methodology, design of the questionnaire for the online survey, discussion of the main findings and tendencies for the sector, and identification of recommendations and priority actions for the sector. Such workshops offered the possibility to focus on skills issues, discuss and exchange on the main realities and challenges facing the sector and its labour market (paid/unpaid), and to create the conditions to work in collaboration to implement the identified recommendations and priority actions for the sector.

Consultation and discussions with European associations and federations in sport were central to the running of the ESSA-Sport project, and responses and feedback on the results helped to shape the final conclusions and recommendations of the project.

# 8.2 CONSULTATION AT THE NATIONAL LEVEL

The 19 national partners acting as national coordinators in the ESSA-Sport project organised national consultation networks of key stakeholders from the sport and physical activity sector, including from government, education, employment and key national sport bodies. A series of consultation activities were carried out in each country since the start of the work programme to involve key national stakeholders and consult with them on each step such as the implementation of the desk research and collection of sport labour market statistics, the development and dissemination of the first ever European Employer Skills Survey, the discussion on main findings and realities, the development of concrete recommendations and the country specific strategic action plan for the sector.

In most countries in the partnership, round tables or specific events were held to discuss with main national stakeholders the results and help to formulate national conclusions and recommendations. Detailed information about the national consultation activities can be found in the ESSA-Sport national reports developed for the 19 countries which had an official ESSA-Sport partner.

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The ESSA-Sport analysis of existing statistics regarding the sport and physical activity sector and the first ever European Employer Skills Survey have proven to be valuable exercises with new knowledge and a number of important messages for stakeholders at all levels. The added value and benefits of both activities have been confirmed as highly relevant and useful for the sector by national and European stakeholders who expressed an interest in repeating them in the future.

The outputs and main findings of both pieces of research have been presented and widely disseminated through the European Union and were shared and discussed with over 80 stakeholders from across the EU at the first ever European Sport Skills Summit organised in Helsinki, Finland, in October 2019. The fully booked event entitled "Employment trends and workforce development priorities" was arranged as a side event of the Finnish Presidency of the Council of the European Union and was hosted by the Finnish Ministry of Education and Culture.

Stakeholder responses were overwhelmingly positive with delegates welcoming the chance to see such new data and information for the first time. They felt the research provided both an EU-wide perspective as well as the opportunity to underline realities and tendencies and compare the size and characteristics of the sport labour market in different EU member countries. A number of important insights and comments were offered by the delegates who actively contributed to the confirmation of the main conclusions of the work carried out and the development of a series of concrete recommendations and priority actions for the sector.

This section of the European Report gathers the main conclusions of the research work carried out through the ESSA-Sport project and presented earlier in the report.

# 9.1 STRONG POSITIVE MESSAGES FROM THE RESEARCH

### Paid employment in the sector is significant and growing

- The sector is of significant importance to the overall EU labour market and its importance is growing. As of 2018, there were 1 765 728 people in paid employment and this represents 0.79% of the EU's overall working population (compared to 0.70% in 2011). Although the size of the overall EU working population has increased, sport and physical activity's share of the total has increased by 0.09%
- The sector has experienced 19.2% growth over the last eight years (2011-2018) in terms of paid employees and the majority of employers surveyed seemed confident that their organisation's workforce would either grow or remain the same over the following two years
- In some EU countries, the proportion of the sport and physical activity labour market in the total workforce is very significant. However there is a high diversity depending on the country. Sweden, for example, has 1.70% of its total population employed in the sport and physical activity labour market, the United Kingdom has 1.43% and Denmark 1.30%. Romania has the smallest proportion (0.13%) followed by Slovakia and Slovenia (0.39%)
- Stakeholders who were consulted at the European Sport Skills Summit in October 2019 were delighted that, for the first time, missing information on the size and growth of the industry had been collated and made available to better understand the realities, challenges and tendencies of the sector. They were insistent that the sport and physical activity labour market should be recognised by the EU and national governments as an important and growing sector which makes a significant and positive economic and social impact, and that further evidence needs to be gathered on this subject. Delegates also felt that some further qualitative research would be helpful to supplement the statistics. Some potential targets from qualitative research are mentioned on the next page

#### The workforce is probably much larger if volunteers were counted in

- The total workforce figures collated through the ESSA-Sport work programme do not include volunteers and unpaid staff. Official statistics provided by Eurostat and National Statistics Offices came from the Labour Force Survey and so only included data related to employment. There are no accurate and detailed figures for volunteering in the sector, but we do know that 58.42% of the nearly 4 000 survey respondents reported that they regularly make use of volunteers and 24% used volunteers occasionally. Indeed, it is well recognised that much grassroots sport, especially at youth level, could not happen without the support of parents and other volunteers
- In future, it will be important to try to calculate the true number of volunteers active in the sector as well as detailed characteristics of their skill needs which would give us a more accurate understanding of the whole workforce, paid and unpaid

#### Sport and fitness workers are employed in many other sectors

The sport labour market is not limited to organisations whose principal economic activity is the provision of sports activities (NACE 93.1). In fact, the research conducted through ESSA-Sport confirmed that almost half of those working in sport and fitness occupations are engaged in organisations from other sectors (e.g. local authorities, hotels), a trend which is likely to continue with the expansion of government funding into organisations that utilise sport as a vehicle to address wider social and health issues

#### Opportunities for paid careers and small business growth

The majority of people working in sport organisations are employed full-time; 55.6% of the total EU sport labour market, versus 44.4% with a part time role. This has not significantly changed over the last eight years. This shows that both stable full time jobs and more flexible part time working are features of employment in the sport and physical activity sector. The relatively high number of self-employed people (over 20%) would also suggest it is a fertile environment for entrepreneurial activity

#### There is an appetite for professional service and skills development

- More than three quarters of respondents to the Employer Skills Survey reported that 'Sports organisations have become more professional in recent years' which is an encouraging message for the sector and its customers/clients
- \$\frac{1}{8}\$ 71% of respondents mentioned that '...staff are willing to train and develop themselves.' Therefore, there seems to be an appetite for self-development which is a clear marker of professionalism and a launch pad for even greater skills acquisition

#### We now know much more about skills development priorities

- The Employer Skills Survey has revealed a number of important training priorities for eight key occupations in the sector: Sport Coach, Outdoor Activity Leader and Animator, Sport Official, Fitness Instructor/ Personal Trainer, Senior Management Staff, Middle Management Staff, Operational Staff and Clerical/Office Staff
- This information is of great value to education and training provider networks and the many sports federations and employer associations which can respond to these training needs

# 9.2 MIXED MESSAGES FROM THE RESEARCH

#### There are wide employment variations between EU countries

- Despite the size and growth of the paid sport and physical activity labour market, it is not evenly distributed across the EU as a proportion of each member country's total workforce. Whereas Sweden, the United Kingdom and Denmark have relatively large proportions of their total workforce employed in sport and physical activity, in other countries the proportions are much smaller. As mentioned above, Romania, for example, has only 0.13% of workforce employed in sport and physical activity, and Slovakia and Slovenia have only 0.39%
- It would be valuable to explore why these national differences exist and what impact this has on other social and health-related issues. The delegates at the European Sport Skills Summit suggested qualitative research into some of those countries with a high proportion of sport and physical activity workers contrasted with those with a low proportion would assist our understanding and be of value to those countries wishing to increase their share. It could for example be interesting to further explore the link between the proportion of the sport and physical activity labour market and the level of practice of sport and physical activity in those countries.

### A better educated workforce, but does it have the right skills?

- Those working in sport and fitness occupations (ISCO 342) have become better educated over the eight-year period and it was confirmed that they are generally better educated than the rest of the population. The number holding higher education qualifications is 43.7% compared to the EU workforce as a whole (35.2%), and there are fewer workers with low education attainment (15.7% compared to 17.1% of population as a whole)
- However, employers report that their number one recruitment problem is 'Lack of applicants with the required skills' (mentioned by 45.6% of respondents to the Employer Skills Survey who have a difficulty with recruitment). In addition, two thirds of respondents reported that 'In the future there will be a demand for a better qualified workforce operating in sports organisations...' and the statement which received the highest level of support (91.5%) was 'It is important that staff have access to on-going training to keep their skills up-to-date.' Thus relevant, appropriate and readily available training remains a demand from the sector which is currently not being adequately addressed
- It is significant that nearly 80% of respondents to the Employer Skills Survey agreed that there is a need for universities and training providers to work more closely with employers and, undoubtedly, this would help to improve the relevance and accessibility of education/training. Delegates at the European Sport Skills Summit suggested that case studies of good practice in forging partnerships between education and employment could be a powerful method of encouraging others. The promotion of dual training modalities (apprenticeships and/or structured internships) in the sector may also be valuable in addressing the greater recruitment and retention of young people as well as ensuring a better fit between employers' skills expectations and what is available 'growing your own' could be an important asset in addressing this mismatch. This would also help to tackle employers' concerns about the cost of training expressed in the Survey

#### But we know more about what skills are needed

Fortunately, the Employer Skills Survey provided some very valuable data on where the training priorities lie for a number of key occupations. Therefore, there is the opportunity to begin to address some of these for Sport Coaches, Outdoor Activity Leaders and Animators, Fitness Instructors/Personal Trainers, Sport Officials, Senior and Middle Managers, Operational Staff and Clerical and Office Staff, these being the occupations for which we have training priority data available

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#### The sector is more reliant on part-time and self-employed workers than other sectors

- There is a very high number of workers in sports-specific occupations who are either part-time or self-employed compared to the EU workforce as a whole. This has pros and cons. On the one hand, this may make the sport labour market more flexible in responding to contraction and expansion of demand and the need to work at weekends and in the evenings. It may also be that for many workers, flexible working arrangements are convenient, particularly those with childcare responsibilities. However, it may also suggest that working in the sector is part of a 'portfolio career' and that organisations are less willing or able to take responsibility for the development of these staff. On the other hand, it could be said that sport and physical activity provides opportunities for those who want to pursue an independent and more entrepreneurial career
- The high numbers of part-time and self-employed staff also has implications for training modalities. Traditional training approaches which assume a high number of full-time staff who can be trained en masse and in situ during the working week may not be the most appropriate human resource development strategy for the sector, and training providers may wish to consider alternative approaches such as distance/e-learning which may also reduce costs. The high number of self-employed staff may indicate the need for entrepreneurial training

### Volunteers make a great contribution, but they also need training

- As noted earlier, volunteering remains very important with 58.4% of employers who responded to the Employer Skills Survey saying that they regularly engaged volunteers/unpaid staff and 24% saying that they did so occasionally. It should be noted that 37.8% of respondents reported problems in engaging volunteers, and 60.8% agreed with the statement "It is difficult to find and recruit people with the right skills to work in your organisation as a volunteer". Therefore recruitment and training of volunteers is a topic which should continue to be studied and addressed by the sector. For most occupations under consideration in the survey, the majority of respondents said that they had the same expectations of volunteers as they did of paid staff and, indeed, they rated the skills of their volunteers quite highly (4 or 5 out of 5). Whereas it is true that volunteering is a worthy pursuit in its own right and a positive component of many people's lives, this dependency on volunteering and the expectations placed on volunteers could be said to be at odds with the drive to professionalise the sector
- It will be important for the sector to promote the positives of volunteering as opposed to 'exploiting' volunteers at the expense of employing paid staff. It may be important in the future for organisations to have a clear volunteering strategy which, whilst valuing volunteering, also provides routes to accredited training/ qualifications for volunteers and opportunities for volunteers to transition to part-time or self-employed status perhaps through entrepreneurial training. The skills and attributes acquired through volunteering experiences in the sector should also be emphasised to support personal development as well as employability and career development. This could be a strong added value to encourage citizens to get involved in volunteering activities all over Europe. Delegates at the European Sport Skills Summit emphasised that this should be done carefully as volunteers should not be seen as 'cheap labour' and that further research should be done to identify and publicise examples of good practice when working with volunteers

#### Many are employed in other sectors, so how do we meet their skills needs?

- The large number of people working in sports specific occupations outside of sports organisations (48.4%) indicates the value of the workforce to the broader economy. This is a bonus. However, this wider (and growing) distribution of sport and physical activity workers may make a strategic approach to their training, development and qualification achievement more difficult
- Organisations with national responsibility for human capital development in the sector may need to acknowledge this and seek to forge closer partnerships with similar organisations in other sectors in order to ensure a joined-up approach to skills development and professionalisation

#### Customer service has improved, but customer service skills still need improvement

- High levels of customer service are vital to the success of any business, including those in sport and physical activity. Whereas less than half of those polled (44.9%) felt that 'Customer service is poor in sport and physical activity facilities and clubs,' customer service skills do emerge as important training priorities for some categories of staff (Operational Staff, and Clerical and Office Staff in particular)
- In future, all training programmes, including those for customer-facing roles, should include an element of customer service to meet the expectations and need of the sector



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# 9.3 SOME CHALLENGING MESSAGES FROM THE RESEARCH

#### The sector needs a more inclusive workforce

- Whereas 89% of employers agreed that 'The workforce of paid staff and volunteers in the sport and physical activity sector needs to be inclusive', the survey highlighted that there has been little progress over the eight-year period towards gender parity. In sport and physical activity organisations, there are still 8.8% more males than females and this disparity has grown since 2011 when the gender gap was only 4.2%. In sport and fitness occupations (which could be said to be more 'customer-facing'), there are around 16% more males than females. In fact, this situation has also worsened since 2011 when the gender gap in sports-specific occupations was only around 8%. However, this picture is not uniform across the sector. Thus, Finland for example has gone from 42% female vs 58% male in 2011 to 52.5% female vs 47.5% male in 2018. Estonia currently has 54.5% females compared to 45.5% males
- Delegates of the European Sport Skills Summit in Helsinki suggested it would be useful to examine national differences in greater detail and also to research and publish some case studies of good practice and initiatives in promoting a more inclusive workforce including factors such as race, cultural background and disability

#### The workforce is growing older

- The workforce is steadily aging with a significant trend towards a decline in the number of people in the 25 to 49 age group (down by 5%) and an increase in those in the 50+ age bracket (up by nearly 4%). This is not necessarily a bad thing since it indicates the sector is capable of retaining talent and experience into later years. However, there may be insufficient numbers of younger people in the 15 to 24 years old band to replace older workers (the younger age group has only grown by 1%). This is a general demographic trend across the workforce as a whole in the EU but could be considered worrying for a sector that should attract and retain younger talent and enthusiasm for sport and physical activity
- The challenges posed by an aging workforce need to be investigated further, and additional efforts made to target the younger generation, possibly through a more determined effort to maximise opportunities presented by apprenticeships. It may also be possible to look at strategies to transition some in the middle age group of volunteers either into part-time employment or self-employment to bolster that age group in the workforce. Bridging/retraining programmes aimed at people from other occupations who currently work as volunteers covering, for example Middle Managers, Sport Coaches and Operational Staff (these being three of the occupations reported as difficult to recruit for) may assist this process. Delegates at the Summit felt that there should be more Continuing Professional Development (CPD) for older workers from the sector to ensure that they keep up with current trends. They also proposed more mentoring schemes whereby older sport sector workers can pass on their skills and attitudes to the younger generations, share experience, support progression and offer careers advice

- Low pay, conditions of service and lack of career progression opportunities appear to be problematic for sport employers who took part in the Employer Skills Survey in both recruitment and retention. 44.2% of them mentioned conditions of service (including pay) as a recruitment issue. 'Better pay by other organisations' (43.8%) and 'Lack of career progression/pathways' (29.9%) were mentioned by employers as retention difficulties
- If the sport and physical activity sector is to attract and retain more professionals particularly younger recruits employers need to raise their game to make working in the sector more attractive. Part of this could be through developing and promoting career progression routes through strong human resource management processes which capture, retain, nurture and promote talent to the highest levels. There may be a need for senior and middle managers in particular to receive training in recruitment and retention. Delegates of the Summit suggested that more needs to be done by sector employers to develop clearer career opportunities and pathways to encourage more young people in

## The sector needs to improve human resource management

- © Currently, strong human resource systems are not universal across the sport and physical activity sector. Only 35.4% of respondents said they regularly reviewed skills and training needs (and probably by implication other aspects of people management such as performance review and succession planning). 41.8% said they did so 'partly' and 17.9% that they did not regularly review the skills and training needs of their workforce
- If workforce planning, recruitment, retention and career progression are to be improved, these processes need to be much more general and effective across organisations and should be promoted as such

#### Perceived costs of training are still a barrier to skills development

- Barriers remain to skills review, training and staff development. Mostly, these difficulties relate to price and funding. Indeed, 48.5% of sport employers taking part in the survey reported 'Lack of funds available for training' as the top barrier for arranging training. 46.2% said that 'Training is too expensive' and 38.8% thought that 'External courses are too expensive'. Cost of training is generally an issue where organisations have other competing priorities
- Education and training providers should be encouraged to find more cost-effective delivery methods. Delegates in the European Sport Skills Summit in Helsinki advocated more in-house training as a method of reducing training costs
- The culture of the sport and physical activity sector also needs to change so that training and development become more of a priority across all organisations, particularly as a feature of professionalisation. This will take time and be subject to commercial realities but lead organisations in the sector should be pushing a skills development culture strategically and consistently. More than 91% of sport employers involved in the European Skills Survey agreed that "It is important that staff have access to ongoing training to keep their skills up to date"

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#### Education and training providers are not always meeting employers' needs

- However, there are some other barriers mentioned by employers that may be easier to address in the short term. Firstly, 39.8% of respondents felt that 'The courses of interest are not available locally'. This suggests that (a) training providers should study local demand more carefully or (b) they should explore the potential for distance/blended learning as an alternative to traditional training modalities
- However, there are some other barriers mentioned by employers that may be easier to address in the short term. Firstly, 39.8% of respondents felt that 'The courses of interest are not available locally'. This suggests that (a) training providers should study local demand more carefully or (b) they should explore the potential for distance/blended learning as an alternative to traditional training modalities
- 23.6% of employers reported that they had a 'Lack of knowledge about training opportunities and suitable courses.' This suggests that more needs to be done in the sector to map training opportunities in each locality and make these available potentially through an online directory
- \$\frac{1}{2}\$ 79.9% of respondents to the Employer Skills Survey agreed with the statement 'Universities and training providers should work more closely with sport organisations' and this is a strong message that requires more collaboration at least on the local and regional level
- Delegates at the Summit argued that education and training providers must become more responsive and flexible in their offers to the sector and consider more approaches which are based on distance and blended learning. Case studies and good practice examples in this area would assist our understanding and encourage similar approaches by others
- Both the cost and relevance of training could also be at least partially addressed by training providers developing shorter courses which are more focused on specific issues such as those shown as training priorities in Section 7 of this report

## 9.4 IMPROVING THE RESEARCH AND ANALYSIS

The research was judged to be a success overall, but as a first-time exercise, there are inevitably some lessons to be learned.

♦ Whereas receiving nearly 4 000 responses to the European Employer Skills Survey must be considered a notable achievement demonstrating a high level of interest and commitment from stakeholders of the sector, if such a survey is done in the future it will be important to fix a target number of responses per country and adjust the balance of responses so that a more accurate reflection of the relative size of each nation in achieved. For example, only 3.6% of the responses came from the United Kingdom, whereas 13% might be considered more appropriate (total UK population is around 13% of that of the EU as whole) or even 25% when considering the proportion of the UK sport and physical activity workforce compared with the rest of the EU's). With larger samples for many of the more populous nations (in particular, Germany, UK, Italy and Spain, as well as France), it would have been possible to look with more reliability and confidence at individual subsectors, for example the Outdoors, Fitness or Coaching. The European Employer Skills Survey sample is probably not fully representative of the sector as whole. The relatively high number of responses from Sports Clubs and the relatively low number from Fitness Clubs and Sports Facility Operators suggest that in future greater efforts need to be made to engage with employers across the sector to make the sample profile a truer reflection of the industry. However, this would mean having a clearer picture of the make-up of the sector and a reasonably accurate breakdown of the number and type of organisations which are currently active, and how to reach them. This would almost certainly require further research prior to any new survey.

Both points above could be addressed by working in closer collaboration with other organisations in the sector, for example, the European and national sports bodies, professional organisations and employer federations and this proposal was strongly supported by the stakeholders who attended the Employer Skills Summit in Helsinki.

- For the statistical analysis of employment data collected from Eurostat, there is a need to explore and better understand the NACE category 85.51 entitled "Sports and recreation education". This contains a number of economic activities which are clearly relevant to the sector, but we do not know whether its workforce is already counted in ISCO 342. This requires further discussion with Eurostat and possibly national statistical offices to try to collate such statistics
- It would be helpful to be able to deal with Leisure Managers as a separate category. For ISCO purposes, these staff are classified within 143 (Other Services Managers), not 342 (Sport and Fitness Workers). Consultations with stakeholders would indicate that the sector sees these people as 'sports-specific' workers. If we could identify them separately, we could add them to ISCO 342 numbers and gain a more accurate understanding of the size of the 'sports-specific' workforce. The same applies to Leisure Attendants/Recreation Assistants who may currently be grouped under 515 Building and Housekeeping Supervisors or possibly 91 Cleaners and Helpers
- Finally, it has been pointed out that in the European Employer Survey we should not make it possible for 'Professional Athletes and Players' to be identified as 'Volunteers'. This is clearly a contradiction in terms and should be corrected in the next questionnaire





### **10.1 STRUCTURE OF THE SECTION**

Section 9 above summarises the main conclusions to be drawn from the analysis of the sport and physical activity labour market based on statistics and data obtained from Eurostat and the ESSA-Sport Employer Skills Survey carried out with responses from nearly 4 000 sport employers from all over Europe. What follows in this final section is a series of concrete recommendations together with a proposed action plan which will be subject to further consultation with EU stakeholders.

The recommendations are divided into the following areas:

- 1 Improving our knowledge and understanding of the sport and physical activity labour market
- 2 Promoting the value of the research and the importance of the sector
- 3 Promoting a more inclusive workforce
- 4 Upskilling and professionalising the sector

### **10.2 RECOMMENDATIONS**

### 10.2.1 Improving our knowledge and understanding of the sport and physical activity labour market

As noted in Section 9 of this European Report, there are several improvements which need to be made to the research and analysis within the sector.

These can be summarised as follows:

- \$\operatorname{2}\$ 1.1 Promote collaboration and partnership on skills with partner organisations, in particular the European and national bodies for sport and physical activity, sports federations, employer associations, academic networks, professional bodies and networks in related sectors
- \$\operatorname{2} 1.2 Explore the opportunity to undertake the Employer Skills Survey on a regular basis (every two or three years), amending the overall methodology and questionnaire to take account of lessons learned in this first iteration and to include questions of interest to the sector and sport employers

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- 1.3 Repeat the collection and analysis of National Statistics Office and Eurostat statistics for the sport and physical activity labour market on an annual basis. This will bring the knowledge of the size and characteristics of the sector up-to-date and help to identify challenges, trends and developments in the sector
- And work with Eurostat to clarify data and groupings:
  - Explore NACE category 85.51 "Sport and recreation education" further to understand why it is a category separate to 93.1 and also to establish if the workforce that is counted under this heading is already counted in ISCO 342 numbers. This category 85.51 is unclear and creates confusion as it includes sport instruction which is inseparable from the main activity of a sport organisation listed within NACE 93.1
  - Influence the revision of the NACE classification to clarify the perimeter of the sport sector and make it easier to collate statistics about the whole sector which is fragmented through a large number of NACE codes at the moment
  - Find a way to separately identify the number of Leisure Managers (currently to be found under ISCO 143 Other Services Managers) so that these can be counted as part of the sport-specific workforce
  - Undertake a similar activity for Leisure Attendants/Recreation Assistants who may currently be grouped under 515 Building and Housekeeping Supervisors or possibly 91 Cleaners and Helpers. These staff make up a significant proportion of facility staff and should be included in the analysis
  - Explore if it is possible to derive four-digit level data for ISCO 342 to identify separate numbers for (i) Athletes and sports players, (ii) Sports coaches, instructors and officials, (iii) Fitness and recreation instructors and programme leaders
- \$\text{\$\sigma}\$ 1.4 Undertake research to develop a better understanding of the wide variations in the size of the sport and physical labour market in each EU member country as a proportion of each country's total workforce



It is clear from the analysis of Eurostat statistics that the sport and physical activity sector is an important source of employment and self-employment in Europe. This is plainly something to be proud of and something to impress on the European Commission, national governments and on other key decision-making organisations.

Promoting the sector as an exciting place to work and a career opportunity should also have a positive impact on the recruitment of young people which will increasingly be needed in the future.

The following recommendation is offered:

2.1 - Promote the value of the research and the importance of the sport and physical activity sector

### 10.2.3 Promoting a more inclusive workforce for the sector

Whilst inclusion in both the workforce and the client/service user base is considered a high priority for the majority of the respondents and for national stakeholders, it is clear that at least for one measure — representation of females — little progress is being made. Currently males outnumber females within the NACE 93.1 category (Sports organisations) by 8.8%, a situation which has worsened over eight years. In the case of ISCO 342 (sports-specific occupations) the disparity is even greater (16% more males than females).

However, there are several EU member states where the employment of female workers either exceeds or is close to the recruitment of males. Exploring recruitment and employment practices in these countries may help to develop strategies which would be helpful across the EU. In addition, the statistics and the survey reveal nothing about other indicators of inclusion (for example, race and disability).

This area contains two recommendations:

- 3.1 Research and develop more approaches to attracting females into the sport and physical activity labour market
- 🕸 3.2 Research other indicators of inclusion in the sport and physical activity labour market



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### 10.2.4 Upskilling and professionalising the workforce

This recommendation covers a wide area which includes the training and development priorities for the eight occupations covered in the ESSA-Sport European Employer Skills Survey, the data regarding the deployment of volunteers, employer attitudes to skills development and recruitment and retention with a particular emphasis on the recruitment and training of younger people.

This area contains seven recommendations:

- \$ 4.1 Optimise the training, development and qualification opportunities for potential and current workers in the sport and physical activity sector
- \$ 4.2 Realise the potential of volunteers to deliver services to professional standards and to transition into the paid workforce
- 4.3 Raise customer service standards for all workers in the sector with particular emphasis on customerfacing roles
- 4.4 Promote stronger, sustainable partnerships between employers and universities/training providers at local and regional level
- 4.5 Develop and promote career progression opportunities
- 4.6 Improve human resource management processes to optimise recruitment, retention and career progression
- 4.7 Further develop measures towards learning mobility as a mainstream activity in the sector



# **10.3 ACTION PLAN**

The following action plan is offered to the European sport and physical activity sector for discussion by all stakeholders.

# Recommendation Area 1: Improving our knowledge and understanding of the sport and physical activity labour market

Recommendation	Priority Action	Actors	Timeline	Measure of success
1.1 Promote collaboration and partnership on skills with partner organisations, in particular the European	Identify potential partner organisations at the European and national levels in sport and physical activity and related sectors	- European and national sport organisations - EOSE members	2020	- Shortlist of potential partners in the sector and related sectors
and national bodies for sport and physical activity, sports federations, employer associations, academic networks,	Establish areas of common interest	- EOSE members - Potential partner organisations	2021	- Contacts and discussions
professional bodies and networks in related sectors.	Establish agreements to source and analyse data on workforce and strengthen cooperation.	- EOSE - Partner organisations	2021	- MOUs/ new projects
	Maintain national stakeholder groups which met during the ESSA-Sport project	<ul><li>ESSA-Sport national coordinators</li><li>National stakeholders</li></ul>	2020	- Meetings or other forms of collaboration to discuss skills issues



Recommendation	Priority Action	Actors	Timeline	Measure of success
Explore the opportunity to undertake the Employer Skills Survey on a regular basis (every two or three years), amending the overall methodology and questionnaire to take account of lessons learned in this first iteration and to include questions of interest	Carry out further research to develop a more accurate profile of the sector in terms of distribution of employers across subsectors and organisational size to assist in creating more representative samples for future surveys.	<ul> <li>European Sport Networks</li> <li>EOSE and its network of members</li> <li>Ministries responsible for sport</li> <li>ESSA-Sport national coordinators</li> <li>National sport stakeholders</li> </ul>	Starting in 2021	<ul> <li>Group of organisations willing to collaborate and work together</li> <li>List of priority topics for the survey</li> </ul>
to the sector and sport employers.	Plan and pilot two or three-yearly surveys in collaboration with European and national partners	<ul> <li>EOSE and its network of members</li> <li>European Sport Networks</li> <li>Partner organisations</li> <li>National and European stakeholders from the sector</li> </ul>	Starting in 2021	<ul> <li>Agreed survey objectives</li> <li>Construction of representative samples and targets</li> <li>Survey questionnaire</li> <li>Distribution channels</li> <li>Follow-up methods</li> <li>Pilot outcomes and updated plans</li> </ul>
	Carry out two or three-yearly surveys of EU employers	<ul> <li>EOSE and its network of members</li> <li>European Sport Networks</li> <li>Partner organisations</li> <li>National and European stakeholders from the sector</li> </ul>	Starting in 2022	- Questionnaires distributed and received to meet agreed sample targets.
	Analyse survey results	- EOSE and its network of members	Starting in 2022	- Data sheets and charts
	Publish analysis of surveys with conclusions and recommendations on EU and national basis	- EOSE and its network of members - Partner organisations	Starting in 2023	- National and EU reports / fact sheets with main findings

Recommendation	Priority Action	Actors	Timeline	Measure of success
<b>1.3</b> Repeat the collection and analysis of National Statistics Office and	Identify data to be collected	- Eurostat - National Statistics Offices	Annual basis starting in 2020	- Template for required data and analysis
Eurostat statistics for the sport and physical activity labour market on an annual basis.	Source data from national and European sources	<ul><li>EOSE and its network of members</li><li>Partner organisations</li></ul>	Starting in 2020 (annual basis)	- Excel spreadsheets
on an annual basis. This will bring the knowledge of the size and characteristics of the sector up-to-date and help to identify challenges, trends and developments in the sector.	Analyse and consult on data	<ul> <li>EOSE and its network of members</li> <li>Partner organisations</li> <li>National and European stakeholders from the sector</li> </ul>	Starting in 2020 (annual basis)	- Analysis sheets and charts including crosstabs
	Publish statistical analysis and headlines for each EU member state and the EU as a whole	<ul><li>EOSE and its network of national members</li><li>Partner organisations</li></ul>	Starting in 2020 (annual basis)	- National and EU summary Fact Sheets on an annual basis
1.4 Undertake research to develop a better understanding of the wide variations in the size of the sport and physical labour market in each EU member country as	Identify target nations for further research and EOSE research partners	- EOSE and its network of national members - Research partner organisations - Sport national stakeholders	2021	- List of pilot nations and partners for research
a proportion of each country's total workforce.	Develop research methodology	- EOSE and its network of national members	2021	- Research methodology developed and agreed
	Undertake research at national levels	- Partner organisations and sport national stakeholders	2021	- Draft research report
	Publish research outcomes	- EOSE and its network of national members	2021	- Final research report published

Recommendation	Priority Action	Actors	Timeline	Measure of success	
1.5 Carry out further research to estimate the size and the main characteristics of the volunteer workforce in the sport and physical activity sector across Europe.	Identify priority topics, research partners and research methods	- European Sport Networks including EOSE	2020/2021	- A network of interested organisations with list of priorities	
	Develop research methodology	- National coordinators and stakeholders	coordinators and	2020/2021	- A detailed research methodology including a timeframe developed and agreed
	Carry out research		2022	- A draft research report with main findings	
	Analyse data and publish research outcomes	<ul> <li>National coordinators and stakeholders</li> <li>European Sport Networks including EOSE</li> <li>Ministries responsible for sport</li> <li>National and European sport stakeholders</li> </ul>	2022	- Final research report published	



### Recommendation Area 2: Promoting the value of the research and the importance of the sport and physical activity sector

Recommendation	Priority Action	Actors	Timeline	Measure of success
<b>2.1</b> Promote the value of the research and the importance of the sport and physical activity sector	Compile list of stakeholders who may benefit from the findings from the ESSA-Sport research	- EOSE and its network of members - European Sport Networks - National partners and coordinators	Starting in 2020	- Comprehensive database of those who may benefit
	Circulate national and EU reports to potential beneficiaries	- EOSE and its network of members	Starting in 2020 (ongoing)	- National and EU reports disseminated
	Work with stakeholder beneficiaries to spread the key messages from the research	<ul> <li>Partner organisations</li> <li>National and European stakeholders from the sector</li> <li>Ministries responsible for sport</li> <li>European Commission</li> </ul>	Starting in 2020 (ongoing)	- Key messages circulated via stakeholder networks either directly or integrated into stakeholder information materials (cascade effect)
	Evaluate the impact of key messages	- EOSE and its network of members - Partner organisations	Starting in 2020 (ongoing)	- Evaluation of the perceived value of the research to sector organisations and indications of other type of data to be collected in future research and analysis.



# Recommendation area 3: Promoting a more inclusive workforce for the sector

Recommendation	Priority Action	Actors	Timeline	Measure of success
3.1 Research and develop more approaches to attracting females into the sport and physical	Explore and analyse reasons for lower representation of females in the workforce in countries with low representation	<ul> <li>European Sport         Networks including         EOSE</li> <li>European and         national sport         stakeholders</li> <li>Ministries         responsible for sport</li> <li>European         Commission</li> </ul>	Starting in 2021	- Research reports into reasons for lower female representation
activity labour market	Identify and research countries with a better record of female employment		Starting in 2021	- Research reports into reasons for high female representation
	Develop new approaches or reinforce existing approaches to attract more females into the sport labour market	<ul> <li>European Sport Networks including EOSE</li> <li>European and national sport stakeholders</li> <li>Ministries responsible for sport</li> </ul>	Starting in 2022	- Strategies by national organisations to attract more female employees.
<b>3.2</b> Research other indicators of inclusion in the sport and physical activity labour market	Identify effective and reliable means of measuring the representation of minorities in the sport labour market	- European Sport Networks including EOSE - European and national sport stakeholders - Ministries responsible for sport	Starting in 2022	- Strategies to measure representation of minorities in the sport labour market
	Carry out research into representation of minorities in the sport labour market		Starting in 2022	- Case studies of effective action to make the sport labour market more inclusive.



# Recommendation area 4: Upskilling and professionalising the workforce

Recommendation	Priority Action	Actors	Timeline	Measure of success
4.1 Optimise the training, development and qualification opportunities for potential and current workers in the sport and physical activity sector	Communicate the training priorities for each of the eight occupations identified in the ESSA-Sport European Employer Skills Survey to national sports bodies, sports federations, education and training providers and other relevant stakeholders	- EOSE and the whole ESSA-Sport consortium of European and national partners - Ministries responsible for sport - European Commission	Starting in 2020 (ongoing)	- National stakeholders and education training providers aware of the training priorities and exploring possibility to align their strategies and offerings to training priorities identified in survey.
	Complete the development of professional occupational standards for the sector	<ul> <li>European Sport Networks including EOSE</li> <li>European and national sport bodies (e.g. federations, national Olympic committees)</li> <li>Social partners and trade unions (European and national)</li> </ul>	Starting in 2020 (ongoing)	- Professional occupational standards for all key occupations in the sector
	Promote and implement opportunities for Continuing Professional Development (CPD) in the sector	- European Sport Networks including EOSE  - European and national sport bodies (e.g. federations, national Olympic committees)  - Social partners and trade unions (European and national)  - Education and	Starting in 2020 (ongoing)	- Case studies and guidance on good practice in continuing professional development targeting paid and self-employed workers
	Promote the development of apprenticeships or similar dual training modalities linked to professional standards		Starting in 2020 (ongoing)	- Apprenticeships/dual training approaches which connect with the sector specific qualifications framework
	Promote and implement shorter, modular training curricula to enable workers in the sector to gain accredited training and qualifications using a variety of training modalities, including workbased, distance and blended learning.	training providers	Starting in 2023	- Availability of modular training programmes for majority of key occupations in the sector.
	Promote professional standards widely within the sector	<ul> <li>EOSE and its network of members and partners</li> <li>European Sport Networks</li> </ul>	Starting in 2020	<ul> <li>Growing awareness of professional standards and qualification frameworks</li> <li>New occupational standards for the sector</li> </ul>

Recommendation	Priority Action	Actors	Timeline	Measure of success
<b>4.2</b> Realise the potential of volunteers to deliver services to professional standards and to transition into the paid workforce	Develop case studies which show good practice in professionalising the volunteer workforce	- European Sport Networks including EOSE - European and national sport bodies (e.g. federations, national Olympic committees)	Starting in 2021	- Case studies on how to develop and validate the skills of volunteer workers - List of skills and attributes acquired through volunteering activities in the sport sector
	Promote professional standards and modular training the volunteer workforce		Starting in 2021	- Wide distribution of information materials about training and qualification options available to volunteers
	Promote and implement specific bridging/retraining programmes to enable volunteers to transition to paid or self-employed status through for example entrepreneurial/small business training	<ul> <li>European Sport Networks including EOSE</li> <li>European and national sport bodies (e.g. federations, national Olympic committees)</li> <li>Education and training providers</li> </ul>	Starting in 2022	- Bridging/retraining programmes available to volunteers
	Create and support opportunities and resources for volunteers to gain qualifications through Recognition non-formal and informal learning (NFIL)		Starting in 2021	- Evidence of volunteers working towards qualifications especially through (NFIL)
<b>4.3</b> Raise customer service standards for all workers in the sector with particular emphasis on customer facing roles	Promote and implement modular programmes for all categories of staff to cover customer service programmes based on professional standards	<ul> <li>European Sport Networks including EOSE</li> <li>National Sport stakeholders</li> <li>Social partners and trade unions (European and national level)</li> <li>Education and training providers</li> </ul>	Starting in 2023	- Availability of modular customer service programmes tailored to the needs of customer facing roles in sport and physical activity
	Promote relevant programmes widely across the sector.	<ul> <li>European Sport Networks including EOSE</li> <li>National Sport stakeholders</li> <li>Social partners and trade unions (European and national level)</li> </ul>	Starting in 2023	- Roll-out of customer service programme

Recommendation	Priority Action	Actors	Timeline	Measure of success
4.4 Promote stronger, sustainable partnerships between employers and universities/training providers at local and regional level	Identify and nominate specific employers or universities/training providers to act as a lead at national or regional level	<ul> <li>European Sport Networks including EOSE</li> <li>National Sport stakeholders</li> <li>European and national sport bodies (e.g. federations, national Olympic committees)</li> <li>Social partners and trade unions (European and national level)</li> <li>Ministries responsible for sport</li> <li>Education and training providers</li> </ul>	Starting in 2021	Nominated leads     New initiatives and collaborative activities
	Encourage lead institutions to create employer/ university/training provider networks at national level	<ul> <li>European Sport Networks including EOSE</li> <li>National Sport stakeholders</li> <li>Social partners and trade unions (European and national level)</li> <li>Ministries responsible for sport</li> <li>Education and training providers</li> </ul>	Starting in 2021	- Case studies of effective partnerships between employers and providers
	Share and encourage the sharing of good practice between networks	European Sport     Networks including     EOSE     National Sport     stakeholders	Starting in 2022	Networks active in identifying and meeting employer training needs     Dissemination of case studies

Recommendation	Priority Action	Actors	Timeline	Measure of success
<b>4.5</b> Develop and promote career progression routes	Develop case studies of career progression within the sector	<ul> <li>European Sport Networks including EOSE</li> <li>National Sport stakeholders</li> </ul>	Starting in 2022	- Case studies demonstrating how individuals can progress through the sector
	Map potential career pathways in the sector, using case study information	<ul> <li>Social partners and trade unions (European and national level)</li> <li>Ministries responsible for sport</li> </ul>	Starting in 2022	- Illustrative career pathways showing progression possibilities based on experience and qualifications
	Develop and promote career advice, information and guidance	- Education and training providers	Starting in 2023	- Careers advice packs promoting employment in the sector and showing career opportunities and pathways
4.6 Improve human resource management processes to optimise recruitment, retention and career progression	Develop tools and resources to enable organisations to improve their human resource management processes for recruitment, retention, initial and continuing professional development, reward, performance management and career progression.	- European Sport Networks including EOSE  - National Sport stakeholders  - European and national sport bodies (e.g. federations, national Olympic committees)  - Social partners and trade unions (European and national level)  - Ministries responsible for sport  - Education and training providers	Starting in 2023	- Availability of tools and resources for HR management tailored to the needs of the sector
	Roll out tools and resources for human resources management to employers in the sector		Starting in 2023	- Take-up of tools and resources for human resources management by sector employers
4.7 Further develop measures towards learning mobility as a mainstream activity in the sector	Test models of learning mobility and promote good practice	- European Commission - EOSE and its members - European sport organisations - Employers - Employees	2020 (ongoing)	- Projects to test and promote good practice in learning mobility
	Support the sport and physical activity sector to take advantage of learning mobility		2020 (ongoing)	- Tools and communication material to facilitate learning mobility and advise the sector of mobility opportunities



# **ESSA-SPORT - PARTNERSHIP**





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