

**ESSA-SPORT**

Improving the Supply of Skills to the Sector



# EUROPEAN LABOUR MARKET AND WORKFORCE DEVELOPMENT PRIORITIES FOR THE SPORT AND PHYSICAL ACTIVITY SECTOR

**YEAR  
2019**



# 1 • THE EUROPEAN UNION (EU-28) AND ITS LABOUR MARKET IN 2018

Source: Eurostat (2018)

## EU-28 total population and employment

**TOTAL POPULATION**  
**512 379 225**

**TOTAL EMPLOYMENT\***  
**223 843 000**

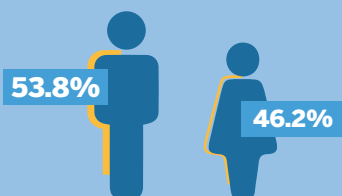
**67.5%** of the population  
aged 15-64

**TOTAL UNEMPLOYMENT\***  
**16 885 000**

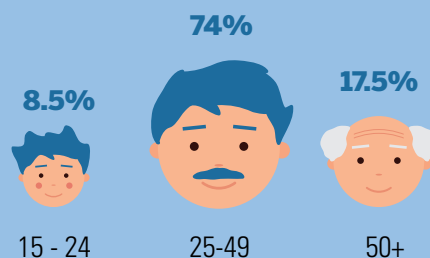
**6.8%** of the active  
population  
lowest rate since 2000

\*persons aged between 15 to 64 years old

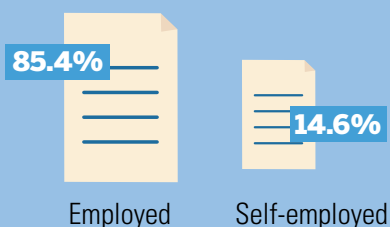
## Total employment EU-28 - Gender



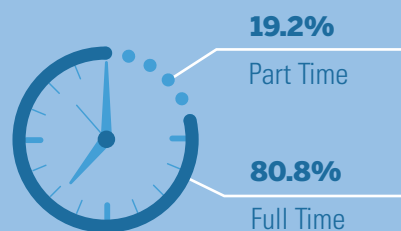
## Total employment EU-28 - Age



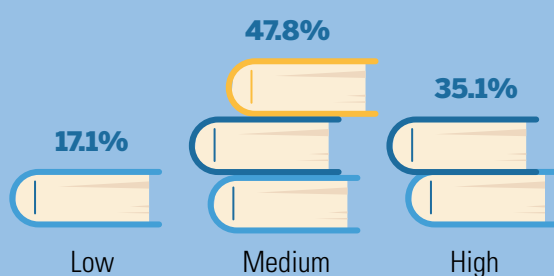
## Total employment EU-28 - Type of employment



## Total employment EU-28 - Type of contract



## Total employment EU-28 - Level of education\*



\* The statistics on level of education collated from Eurostat refer to ISCED level:

	ISCED 2011 (data from 2014 onwards)
Low education	Levels 0-2
Medium education	Levels 3-4
High education	Levels 5-8

This section presents the analysis from the official statistics collated at both the national and European level through National Statistics Offices (NSO) and Eurostat. For the purpose of the fact-sheet, data are provided for the years 2011 and 2018 to underline tendencies.

The collection of data has been a challenge and this analysis is the best information available about the European sport labour market from the official statistics but is not necessarily the exact reality. Further discussion on the statistics can be found on the European report of the project.

**Scope:** 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 fact sheet we are using the word “sport sector” having the meaning of the broad sector of “sport and physical activity”.

## 2.1 SIZE AND CHARACTERISTICS OF THE EUROPEAN SPORT LABOUR MARKET

Sources: Eurostat and National Statistics Offices (2011 and 2018)

To summarise our statistical definition for the sport labour market, the work carried out in collaboration with National Statistics Offices (NSO) and Eurostat was to collate available statistics on the number of:

- Persons having a sport-specific occupation (ISCO 342\*) in an organisation whose main business is the provision of sport (NACE 93.1\*\*), e.g. professional athletes, coaches, instructors in a sport club
- Persons having a non-sport specific 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-specific 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

\* 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).

\*\* 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).

### EU-28 sport labour market (=total sport employment)



- Top 4 countries representing 62% of the EU-28 sport labour market in 2018



### EU-28 sport labour market Vs EU-28 total employment



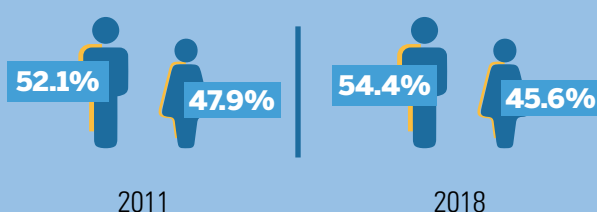
- Top 3 countries in 2018



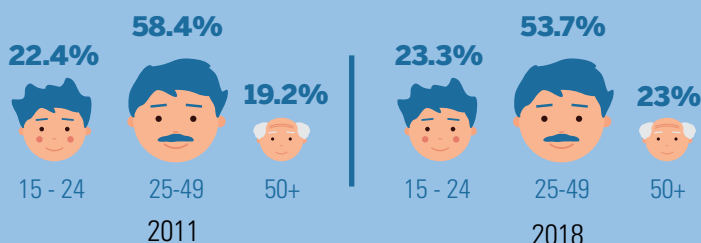
- Bottom 3 countries in 2018



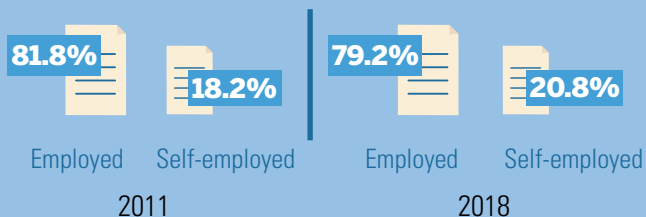
### EU-28 sport labour market - Gender



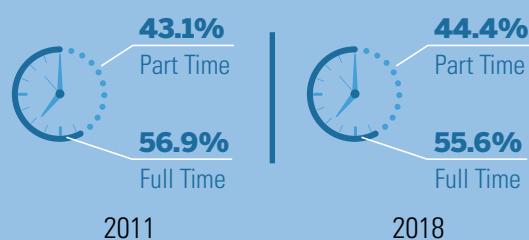
### EU-28 sport labour market - Age



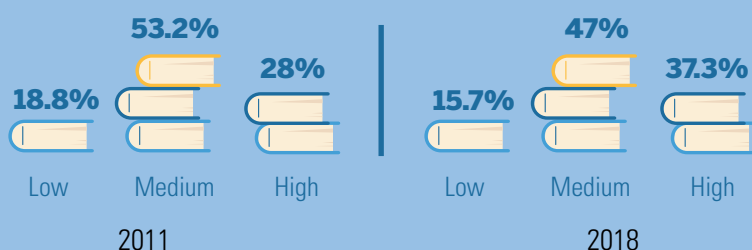
## EU-28 sport labour market - Type of employment



## EU-28 sport labour market - Type of contract



## EU-28 sport labour market - Level of education\*



\* The statistics on level of education collated from Eurostat refer to ISCED level:

	ISCED 2011 (data from 2014 onwards)	ISCED 1997 (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

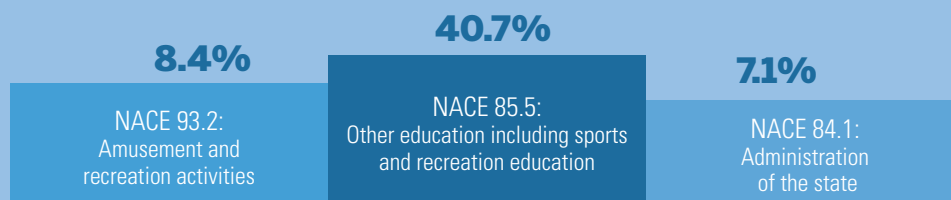
## 2.2 FOCUS ON SPORT SPECIFIC OCCUPATIONS (ISCO 342)

(ISCO 3421 - Athletes and Sports Players; ISCO 3422 - Sports Coaches, Instructors and Officials; ISCO 3423 - Fitness and Recreation Instructors and Programme Leaders)

### Total number of people having a sport specific occupation (ISCO 342)



### Top 3 of the other NACE codes where sport specific occupations are engaged in 2018



### Growth from 2011 to 2018



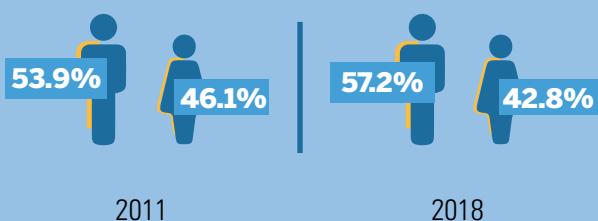
### Proportion of sport occupation in 2018



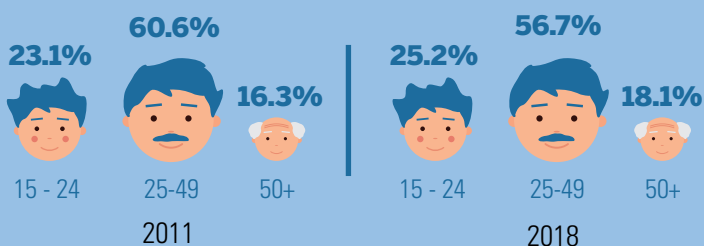
## CHARACTERISTICS OF PEOPLE HAVING A SPORT SPECIFIC OCCUPATION IN EUROPE - ISCO 342

(ISCO 3421 - Athletes and Sports Players; ISCO 3422 - Sports Coaches, Instructors and Officials; ISCO 3423 - Fitness and Recreation Instructors and Programme Leaders)

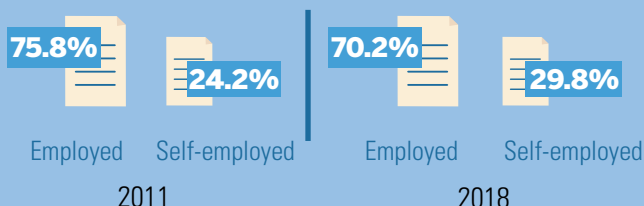
### Total sport specific occupation - Gender



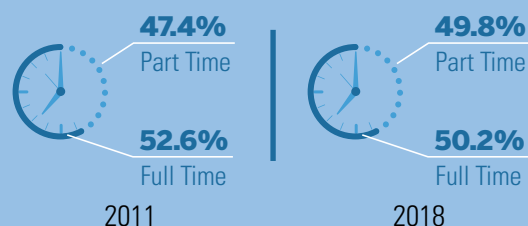
### Total sport specific occupation - Age



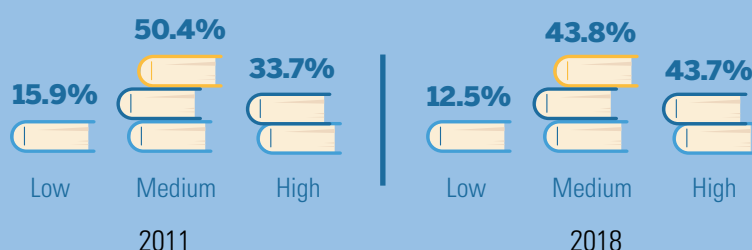
### Total sport specific occupation - Type of employment



### Total sport specific occupation - Type of contract



### Total sport specific occupation - Level of Education\*



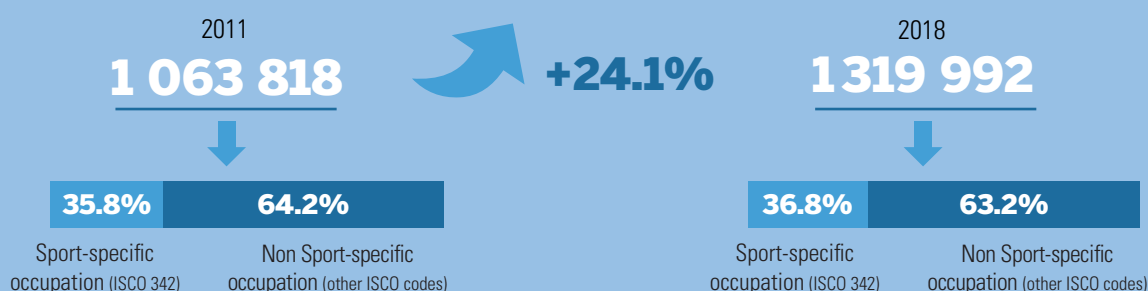
\* The statistics on level of education collated from Eurostat refer to ISCED level:

	ISCED 2011 (data from 2014 onwards)	ISCED 1997 (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

## 2.3 FOCUS ON SPORT ORGANISATIONS (NACE 93.1)

NACE 93.1 (Sport activities) includes all 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)

### Total number of people working in a sport organisation in EU-28 (NACE 93.1)



### Occupations engaged within sport organisations (NACE 93.1) - 2016

	ISCO 1 – Managers (e.g. directors, CEO)	8.8%
	ISCO 2 – Professionals (Health professionals, communication professionals, journalists, lawyers)	5.3%
	ISCO 3 - Technicians and associate professionals (incl. sport and fitness workers)	43.6%
	ISCO 4 - Clerical Support Workers (e.g. secretaries, receptions, bookkeepers)	11.9%
	ISCO 5 - Service and sales workers (e.g. conductors, cooks, waiters, lifeguards, sales workers)	16.9%
	ISCO 6 - Skilled agricultural and fishery workers (e.g. animal producers, market gardeners)	2.8%
	ISCO 7 - Craft and related trades workers (e.g. building workers, painters, cleaners, bicycle repairers)	1.7%
	ISCO 8 - Plant and machine operators and assemblers (e.g. car, van, bus drivers, machine operators)	0.8%
	ISCO 9 - Elementary occupations (e.g. office cleaners, labourers, deliverers)	8.2%

# 3 •

## SKILLS NEEDS AND TENDENCIES FOR THE SPORT AND PHYSICAL ACTIVITY SECTOR

This section presents the main results and key information from the first ever European Employer Skills Survey for the sport and physical activity sector. The goal was to consult the widest variety of employers to collate data on realities and difficulties to recruit and retain staff and volunteers and to identify the skill needs and future priorities for the sector.

The online survey was a great success with a total of **3,812 valid responses** collated from sport employers across the whole European Union.

**Important:** the analysis provides an elaboration of all responses collated through the survey and so should be taken into consideration carefully as it is not necessary the exact reality and the exact picture of the whole sector.

### 3.1 THE PROFILE OF RESPONDENTS TO THE SURVEY

#### Top 5 type of respondents - n=3797



Sport Club  
**43.9%**



Sport Federation  
**19.7%**



Municipality/Local Authority  
**5.8%**



Fitness Club/ Centre  
**4.6%**



Outdoor Activity provider  
**3.9%**

#### Status of respondents - n=3728



Not-for-Profit  
**61.8%**



Public  
**17.8%**



Commercial (private for profit)  
**13%**

\*Other= 7.4%

#### Size of organisations - n=3634



No staff  
**20.6%**



1 to 4 employees  
**29.1%**



5 to 49 employees  
**35.2%**



50+ employees  
**13.8%**

\*Do not know= 1.3%

### 3.2 EMPLOYMENT AND PRIORITY SKILLS FOR DEVELOPMENT

#### A positive forecast for the sector workforce

- Compared to 12 months ago, the number of employees in respondents' organisation has: n=3524

Increased

**24.7%**

Remained the same

**62.6%**

Decreased

**8.8%**

\*Do not know= 3.9%

- Over the next 2 years, respondents think that the workforce of their organisation will: n=3551

Increase

**29.4%**

Remain the same

**51.3%**

Decrease

**7.6%**

\*Do not know= 11.7%

#### Occupations engaged in respondents' organisation - n=3565

1		Sport coaches	<b>79.6%</b>
2		Clerical and Office staff	<b>70.5%</b>
3		Senior Management staff	<b>57.7%</b>
4		Middle Management staff	<b>52.1%</b>
5		Sport officials	<b>48.9%</b>
6		Operational staff	<b>46.1%</b>
7		Athletes and Players	<b>34.1%</b>
8		Outdoor activity leaders and animators	<b>31.1%</b>
9		Fitness Instructors / Personal Trainers	<b>29.3%</b>



## Skills and attributes

5 most important skills and attributes		5 weakest skills and attributes
<ol style="list-style-type: none"> <li>1. Sport specific knowledge and skills</li> <li>2. Clearly communicate instructions</li> <li>3. Ensure health and safety of participants</li> <li>4. Plan coaching sessions and programmes</li> <li>5. Ability to work in compliance codes of practice/ethics</li> </ol>	 <b>Sport coaches</b>	<ol style="list-style-type: none"> <li>1. Ability to work with people with disabilities</li> <li>2. Information/Communication Technology (ICT) skills</li> <li>3. Marketing and selling skills</li> <li>4. Organise activities and events</li> <li>5. Ability to work with different participants</li> </ol>
<ol style="list-style-type: none"> <li>1. Ensure health and safety of participants</li> <li>2. Clearly communicate instructions</li> <li>3. Sport/activity specific technical knowledge and skills</li> <li>4. Ability to work in compliance with codes of practice/ethics</li> <li>5. Team working skills</li> </ol>	 <b>Outdoor activity leaders &amp; animators</b>	<ol style="list-style-type: none"> <li>1. Ability to work with people with disabilities</li> <li>2. Marketing and selling skills</li> <li>3. Information/Communication Technology (ICT) skills</li> <li>4. Organise activities and events</li> <li>5. Sport/activity specific technical knowledge and skills</li> </ol>
<ol style="list-style-type: none"> <li>1. Ensure health and safety of participants</li> <li>2. Exercise science knowledge (anatomy / physiology)</li> <li>3. Communicating effectively with participants</li> <li>4. Designing sessions and programmes</li> <li>5. Understand participant needs</li> </ol>	 <b>Fitness instructors/ personal trainers</b>	<ol style="list-style-type: none"> <li>1. Marketing and selling skills</li> <li>2. Ability to work with people with disabilities</li> <li>3. Communicating effectively with participants</li> <li>4. Understand participant needs</li> <li>5. Exercise science knowledge</li> </ol>
<ol style="list-style-type: none"> <li>1. Apply the rules and laws of the sport</li> <li>2. Uphold integrity and fair play</li> <li>3. Decision-making skills</li> <li>4. Ability to work in compliance with codes of practice/ethics</li> <li>5. Problem-solving skills</li> </ol>	 <b>Sport Officials (e.g. referees, judges)</b>	<ol style="list-style-type: none"> <li>1. Managing conflict</li> <li>2. Communicate information as an official</li> <li>3. Information/Communication Technology (ICT) skills</li> <li>4. Problem-solving skills</li> <li>5. Apply the rules and laws of the sport</li> </ol>
<ol style="list-style-type: none"> <li>1. Team working</li> <li>2. Problem-solving skills</li> <li>3. Organisational and planning skills</li> <li>4. Verbal communication skills</li> <li>5. Ability to work in compliance with codes of practice/ethics</li> </ol>	 <b>Senior and middle management staff</b>	<ol style="list-style-type: none"> <li>1. Strategic thinking</li> <li>2. Leading change</li> <li>3. Business development skills</li> <li>4. Marketing and sales skills</li> <li>5. Facilitating innovation</li> </ol>
<ol style="list-style-type: none"> <li>1. Technical skills and knowledge required for their role</li> <li>2. Team working skills</li> <li>3. Ability to work in compliance with codes of practice/ethics</li> <li>4. Ability to maintain health, safety and security standards</li> <li>5. Problem-solving skills</li> </ol>	 <b>Operational staff</b>	<ol style="list-style-type: none"> <li>1. Communication skills</li> <li>2. Problem-solving skills</li> <li>3. Organisational and work planning skills</li> <li>4. Technical skills and knowledge required for their role</li> <li>5. Team working skills</li> </ol>
<ol style="list-style-type: none"> <li>1. Administration skills</li> <li>2. Understanding written documents and writing clearly</li> <li>3. Communication skills</li> <li>4. Technical skills and knowledge required for their role</li> <li>5. Customer service skills</li> </ol>	 <b>Clerical and office staff / receptionists</b>	<ol style="list-style-type: none"> <li>1. Information/Communication Technology (ICT) skills</li> <li>2. Communication skills</li> <li>3. Organisational and planning skills</li> <li>4. Problem-solving skills</li> <li>5. Use of technology, equipment and tools</li> </ol>

## 3.3 RECRUITMENT REALITIES AND CHALLENGES

### Recruitment of a paid employee in the past 12 months - n=3042

\*Do not know= 5.7%

**49.6% YES**



**44.7% NO**



**27% YES**

**42.3% NO**

**30.7% DO NOT KNOW**



**Difficulties to fill vacancies - n=3037**

### Top 3 difficulties when recruiting - n=2127

**45.6%**

Low numbers of applicants with the required skills

**44.1%**

Unattractive terms and conditions offered for this post

**38.7%**

Low numbers of applicants with required motivation and attitude

### Top 3 hardest roles to fill - n=786

**73%**

Sport Coaches

**27.4%**

Clerical and office staff

**23.9%**

Operational staff

### 3.4 RETENTION REALITIES AND CHALLENGES

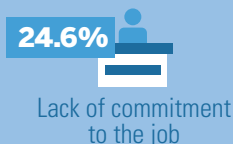
#### Difficulties retaining staff - n=3019



#### • Hardest roles to retain (top 3) - n=634

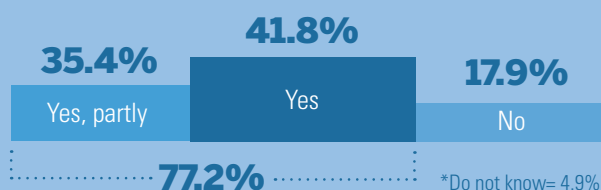


#### • Top 5 difficulties expressed for retaining staff - n=642

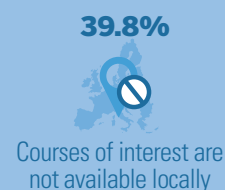
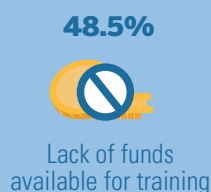


### 3.5 WORKFORCE DEVELOPMENT AND TRAINING

#### Organisational review of skills and training needs of staff - n=2901



#### • Top 3 barriers expressed for arranging training - n=2758



### 3.6 ENGAGEMENT OF VOLUNTEERS

#### Engagement of volunteers in a typical year - n=3612



#### Expectations of volunteers and paid staff

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

#### • Sport officials n=1064

**69% Yes**   **31% No**

#### • Outdoor activity leaders and animators n=745

**59.6% Yes**   **40.4% No**

#### • Sports Coaches n=2363

**56% Yes**   **44% No**

#### • Clerical and office staff / receptionists n=1558

**52% Yes**   **48% No**

#### • Operational staff n=1060

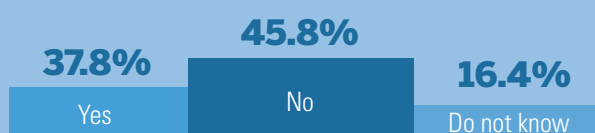
**52% Yes**   **48% No**

#### • Senior and middle management staff n=1540

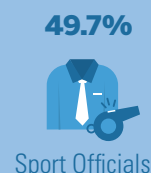
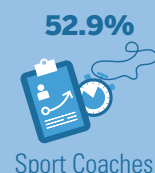
**51% Yes**   **49% No**

#### Problems in engaging volunteers and for which occupations

#### • Any particular problem engaging volunteers n=3018



#### • Top 3 occupations where there are problems engaging volunteers





# KEY ISSUES AND CHALLENGES FOR THE SPORT AND PHYSICAL ACTIVITY SECTOR - n= 2930

- Expectations and priorities from national governments on sport organisations are increasing



60.8%



21.5%

- Sport organisations have become more professional in recent years



77.6%



12.8%

- The sector is changing and evolving, as a result the skills needed by those working in the sector will change too



79%



9.4%

- In the future there will be a demand for a better qualified workforce operating in sport organisations



66.8%



16.7%

- It is difficult to find and recruit people with the right skills to work as paid staff



50.8%



31.1%

- It is difficult to find and recruit people with the right skills to work as volunteers



60.8%



25.7%

- It is important that staff have access to ongoing training to keep their skills up to date



91.5%



3.2%

- New training courses are required to meet the training needs of sport organisations



71.9%



16.7%

- Universities/ training providers should work more closely with sport organisations



79.9%



6.9%

- It is difficult to progress from a technical role (e.g. as a coach or instructor) to a management position



51.1%



32%

- The workforce of paid staff and volunteers in the sport and physical activity sector needs to be inclusive (reflecting gender, disability and minorities in society)



71.5%



15.4%

- Staff would benefit from learning experiences in other countries



57%



20.4%

The missing percentages stand for the answer "I do not know" present in the initial survey. Respondents indicate their agreement/disagreement with the above statements.

## THE 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 EU.

The 3-year project, which concluded in October 2019, aimed to create a debate 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 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 EU level to take forward the conclusions and recommendations made in national and EU Reports.

The consortium, composed of 20 national coordinators and 5 European networks, is proud to have generated new knowledge and statistics included within this European Fact Sheet.

Further information on the identified skill needs and future priorities for the sector can be found in the detailed European Report as well as National Reports.



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## PARTNERSHIP



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