FRANCE

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

YEAR 2019
THE OVERALL NATIONAL LABOUR MARKET IN 2018

Source: Eurostat (2018)

Population and Employment

TOTAL POPULATION
66 926 166

TOTAL EMPLOYMENT*
26 744 000
65.4% of the population aged 15-64

TOTAL UNEMPLOYMENT*
2 700 000
9.1% of the active population

*persons aged between 15 to 64 years old

Total employment - Gender

51.7% Employed
48.3% Self-employed

Total employment - Age

75.3% 25-49
16.2% 50+
8.5% 15 - 24

Total employment - Type of employment

88.9% Employed
11.1% Self-employed

Total employment - Type of contract

82% Full Time
18% Part Time

Total employment - Level of education*

41.5% High
43.7% Medium
14.8% Low

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

<table>
<thead>
<tr>
<th>ISCED 2011 (data from 2014 onwards)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low education</td>
</tr>
<tr>
<td>Medium education</td>
</tr>
<tr>
<td>High education</td>
</tr>
<tr>
<td>Levels 5-2</td>
</tr>
<tr>
<td>Levels 3-4</td>
</tr>
<tr>
<td>Levels 5-8</td>
</tr>
</tbody>
</table>
This section presents analysis from the official statistics collated at both national and European level through National Statistics Offices (NSO) and Eurostat. For the purpose of the fact sheet, data are provided for two different years to underline tendencies. These years can be different depending on the topic as we have not always been able to collate the same level of information/statistics for each year.

The collection of data has been a challenge and this analysis presents the best information available about the national sport labour market from the official statistics but is not necessarily the exact reality. Further discussion on the statistics can be found in 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 term “sport sector” having the meaning of the broad sector of “sport and physical activity”.

3.1 SIZE AND CHARACTERISTICS OF THE NATIONAL SPORT LABOUR MARKET

Sources: Eurostat and National Statistics Offices

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 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).

National sport labour market (=total sport employment)

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Sport Employment</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>167,459</td>
<td>+9.6%</td>
</tr>
<tr>
<td>2018</td>
<td>183,551</td>
<td></td>
</tr>
</tbody>
</table>

Top 4 countries representing 62% of the EU-28 sport labour market in 2018 (Total EU-28 sport employment = 1,765,728)

<table>
<thead>
<tr>
<th>Country</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>25.2%</td>
</tr>
<tr>
<td>Germany</td>
<td>14.4%</td>
</tr>
<tr>
<td>Spain</td>
<td>12%</td>
</tr>
<tr>
<td>France</td>
<td>10.4%</td>
</tr>
</tbody>
</table>

National sport labour market Vs National total employment

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Sport Employment % of Total Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>0.64%</td>
</tr>
<tr>
<td>2018</td>
<td>+0.05%</td>
</tr>
</tbody>
</table>

Top 3 countries in 2018

<table>
<thead>
<tr>
<th>Country</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Norway</td>
<td>1.70%</td>
</tr>
<tr>
<td>England</td>
<td>1.43%</td>
</tr>
<tr>
<td>France</td>
<td>1.30%</td>
</tr>
</tbody>
</table>

Bottom 3 countries in 2018

<table>
<thead>
<tr>
<th>Country</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Russia</td>
<td>0.39%</td>
</tr>
<tr>
<td>Poland</td>
<td>0.39%</td>
</tr>
<tr>
<td>Spain</td>
<td>0.13%</td>
</tr>
</tbody>
</table>

National sport labour market - Gender

<table>
<thead>
<tr>
<th>Year</th>
<th>Male %</th>
<th>Female %</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>57.6%</td>
<td>42.4%</td>
</tr>
<tr>
<td>2018</td>
<td>61.1%</td>
<td>38.9%</td>
</tr>
</tbody>
</table>

National sport labour market - Age

<table>
<thead>
<tr>
<th>Year</th>
<th>15-24</th>
<th>25-49</th>
<th>50+</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>63.8%</td>
<td>22.6%</td>
<td>13.6%</td>
</tr>
<tr>
<td>2018</td>
<td>59.7%</td>
<td>22.1%</td>
<td>18.2%</td>
</tr>
</tbody>
</table>
3.2 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)

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Number of People</th>
<th>Percentage Change</th>
<th>2014</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>100 672</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>112 512</td>
<td>+11.8%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Engaged in a sport organisation (NACE 93.1) 37.4% 47.4%
- Engaged in an organisation whose main business is not the provision of sport (other NACE codes) 62.6% 52.6%

- Top 3 of the other NACE codes where sport specific occupations are engaged in 2016
  - NACE 84.1: Administration of the state 28.7%
  - NACE 85.5: Other education including sports and recreation education 39.2%
  - NACE 93.2: Amusement and recreation activities 5.4%

- Variance from 2014 to 2018
  - Athletes and Sports Players ISCO 3421 -51.8%
  - Sports Coaches, Instructors and Officials ISCO 3422 +25.3%
  - Fitness and Recreation Instructors & Programme Leaders - ISCO 3423 -13.3%

- Proportion of sport occupation in 2018
  - Athletes and Sports Players ISCO 3421 3.7%
  - Sports Coaches, Instructors and Officials ISCO 3422 82.6%
  - Fitness and Recreation Instructors and Programme Leaders - ISCO 3423 13.7%
CHARACTERISTICS OF PEOPLE HAVING A SPORT SPECIFIC OCCUPATION - 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**

- 2014: 61.4% Male, 38.6% Female
- 2018: 64.9% Male, 35.1% Female

**Total sport specific occupation - Age**

- 2014:
  - 15-24: 12.9%
  - 25-49: 24.8%
  - 50+: 19.8%
- 2018:
  - 15-24: 62.3%
  - 25-49: 24.8%
  - 50+: 15.7%

**Total sport specific occupation - Type of employment**

- 2014:
  - Employed: 80%
  - Self-employed: 20%
- 2018:
  - Employed: 73.6%
  - Self-employed: 26.4%

**Total sport specific occupation - Type of contract**

- 2014:
  - Part Time: 40.1%
  - Full Time: 59.9%
- 2018:
  - Part Time: 59%
  - Full Time: 41%

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

- 2014:
  - Low education: 10.4%
  - Medium education: 45.4%
  - High education: 44.2%
- 2018:
  - Low education: 4%  
  - Medium education: 41.4%
  - High education: 54.6%

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

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

3.3 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 (NACE 93.1)**

- 2014: 104,470
- 2018: 124,325

<table>
<thead>
<tr>
<th>Occupation Type</th>
<th>2014</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sport-specific</td>
<td>36.1%</td>
<td>42.9%</td>
</tr>
<tr>
<td>Non Sport-specific</td>
<td>63.9%</td>
<td>57.1%</td>
</tr>
</tbody>
</table>

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

- ISCO 1 – Managers (e.g. directors, CEO): 9.3%
- ISCO 2 – Professionals (Health professionals, communication professionals, journalists, lawyers): 7.5%
- ISCO 3 – Technicians and associate professionals (incl. sport and fitness workers): 53.6%
- ISCO 4 – Clerical Support Workers (e.g. secretaries, receptions, bookkeepers): 14.8%
- ISCO 5 – Service and sales workers (e.g. conductors, cooks, waiters, lifeguards, sales workers): 5.4%
- ISCO 6 – Skilled agricultural and fishery workers (e.g. animal producers, market gardeners): 3.8%
- ISCO 7 – Craft and related trades workers (e.g. building workers, painters, cleaners, bicycle repairers): 1.8%
- ISCO 8 – Plant and machine operators and assemblers (e.g. car, van, bus drivers, machine operators): 0%
- ISCO 9 – Elementary occupations (e.g. office cleaners, labourers, deliverers): 3.9%
This section presents the main national 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 and 1141 responses from your country.

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.

### 4.1 THE PROFILE OF RESPONDENTS TO THE SURVEY

#### Top 5 type of respondents - n=1141

1. **Sport Club** 57.3%
2. **Sport Federation** 23.8%
3. **Outdoor activity provider** 5.9%
4. **Sport body** 4.8%
5. **Network association (umbrella organisation)** 2.3%

#### Status of respondents - n=1128

- **Not-for-Profit** 90%
- **Commercial [private for profit]** 6.8%
- **Public** 1.8%

#### Size of organisations - n=1121

- **No staff** 19.7%
- **1 to 4 employees** 48.1%
- **5 to 49 employees** 28.5%
- **50+ employees** 3.4%

### 4.2 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:
  - Increased 18.8%
  - Remained the same 68.7%
  - Decreased 10.2%

- Over the next 2 years, respondents think that the workforce of their organisation will:
  - Increase 19.9%
  - Remain the same 60%
  - Decrease 9.3%

#### Occupations engaged in respondents’ organisation - n=1110

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Sport coaches</td>
<td>88.7%</td>
</tr>
<tr>
<td>2 Clerical and Office staff</td>
<td>72%</td>
</tr>
<tr>
<td>3 Sport officials</td>
<td>62.8%</td>
</tr>
<tr>
<td>4 Senior Management staff</td>
<td>39%</td>
</tr>
<tr>
<td>5 Middle Management staff</td>
<td>32.4%</td>
</tr>
<tr>
<td>6 Operational staff</td>
<td>25.9%</td>
</tr>
<tr>
<td>7 Outdoor activity leaders and animators</td>
<td>19.3%</td>
</tr>
<tr>
<td>8 Athletes and Players</td>
<td>18.1%</td>
</tr>
<tr>
<td>9 Fitness Instructors / Personal Trainers</td>
<td>9.7%</td>
</tr>
</tbody>
</table>
### 5 Most Important Skills and Attributes

<table>
<thead>
<tr>
<th>Sport Coaches</th>
<th>Fitness Instructors/Personal Trainers</th>
<th>Outdoor Activity Leaders &amp; Animators</th>
<th>Senior and Middle Management Staff</th>
<th>Operational Staff</th>
<th>Clerical and Office Staff / Receptionists</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Sport specific knowledge and skills</td>
<td>1. Ability to work with people with disabilities</td>
<td>1. Ability to work with people with disabilities</td>
<td>1. Communication skills</td>
<td>1. Information/Communication Technology (ICT) skills</td>
<td>1. Administration skills</td>
</tr>
<tr>
<td>3. Clearly communicate instructions</td>
<td>3. Ability to work with different participants</td>
<td>3. Ability to work with different participants</td>
<td>3. Team working skills</td>
<td>3. Organisational and planning skills</td>
<td>3. Technical skills and knowledge required for their role</td>
</tr>
<tr>
<td>5. Ability to work in compliance with codes of practice/ethics</td>
<td>5. Information/Communication Technology (ICT) skills</td>
<td>5. Problem-solving skills</td>
<td>5. Problem-solving skills</td>
<td>5. Problem-solving skills</td>
<td>5. Use of technology, equipment and tools</td>
</tr>
</tbody>
</table>

### 5 Weakest Skills and Attributes

<table>
<thead>
<tr>
<th>Sport Coaches</th>
<th>Fitness Instructors/Personal Trainers</th>
<th>Outdoor Activity Leaders &amp; Animators</th>
<th>Senior and Middle Management Staff</th>
<th>Operational Staff</th>
<th>Clerical and Office Staff / Receptionists</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Ability to work with people with disabilities</td>
<td>1. Managing conflict</td>
<td>1. Leading change</td>
<td>1. Communication skills</td>
<td>1. Information/Communication Technology (ICT) skills</td>
<td>1. Information/Communication Technology (ICT) skills</td>
</tr>
<tr>
<td>2. Marketing and selling skills</td>
<td>2. Information/Communication Technology (ICT) skills</td>
<td>2. Strategic thinking</td>
<td>2. Communication skills</td>
<td>2. Organisational and planning skills</td>
<td>2. Technical skills and knowledge required for their role</td>
</tr>
<tr>
<td>3. Ability to work with people with disabilities</td>
<td>3. Decision-making skills</td>
<td>3. Marketing and sales skills</td>
<td>3. Organisational and work planning skills</td>
<td>3. Use of technology, equipment and tools</td>
<td>3. Technical skills and knowledge required for their role</td>
</tr>
<tr>
<td>5. Problem-solving skills</td>
<td>5. Apply the rules and laws of the sport</td>
<td>5. Team working</td>
<td>5. Problem-solving skills</td>
<td>5. Problem-solving skills</td>
<td>5. Use of technology, equipment and tools</td>
</tr>
</tbody>
</table>

### 4.3 Recruitment Realities and Challenges

- **Recruitment of a paid employee in the past 12 months**: 980 respondents
  - Yes: 55.6%
  - No: 26.7%
  - Do not know: 17.7%

- **Difficulties to fill vacancies**: 979 respondents
  - Yes: 47.3%
  - No: 26%
  - Do not know: 26%

- **Top 3 difficulties when recruiting**: 752 respondents
  - Unattractive terms and conditions (e.g. wage): 50.7%
  - Low number of applicants with the required skills: 45.1%
  - Low number of applicants with required motivation and attitude: 41%

- **Top 3 hardest roles to fill**: 254 respondents
  - Sport Coaches: 94.9%
  - Clerical and office staff: 13.8%
  - Outdoor activity leaders and animators: 11.8%
4.4 RETENTION REALITIES AND CHALLENGES

**Difficulties retaining staff** - n=977

- **18.6%** Yes
- **59%** No
- **22.4%** Do not know

- **18.4%** Hardest roles to retain (top 3) - n=174
  - **Sport Coaches** 86.8%
  - **Clerical and office staff** 18.4%
  - **Middle management staff** 12.1%

- **Top 5 difficulties expressed for retaining staff** - n=173
  - **42.8%** Lack of financial stability for the organisation
  - **41.6%** Lack of career progression/pathways
  - **34.1%** Better pay by other organisations
  - **28.3%** Unattractive conditions of employment
  - **25.4%** Lack of commitment to the job

4.5 ENGAGEMENT OF VOLUNTEERS

**Engagement of volunteers in a typical year** - n=1116

- **92.2%** Organisations engaging volunteers
- **7.7%** Organisations not engaging volunteers

* Do not know= 0.1%

**Expectations of volunteers and paid staff**

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

- **Sport officials** n=469
  - **69.8%** Yes
  - **30.2%** No

- **Clerical and office staff / receptionists** n=474
  - **54%** Yes
  - **46%** No

- **Outdoor activity leaders and animators** n=188
  - **59.6%** Yes
  - **40.4%** No

- **Operational staff** n=212
  - **52.8%** Yes
  - **47.2%** No

- **Sports Coaches** n=831
  - **51.3%** Yes
  - **48.7%** No

- **Senior and middle management staff** n=270
  - **58.4%** Yes
  - **41.6%** No

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

- **Any particular problem engaging volunteers** n=977
  - **28.8%** No
  - **62.5%** Yes
  - **8.7%** Do not know

- **Top 3 occupations where there are problems engaging volunteers** n=610
  - **74.8%** Management: board members
  - **54.9%** Sport Officials
  - **53.3%** Sport Coaches

FRANCE
### Key Issues and Challenges for the Sport and Physical Activity Sector

<table>
<thead>
<tr>
<th>Issue</th>
<th>Percentage Agree</th>
<th>Percentage Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expectations and priorities from national governments on sport organisations are increasing</td>
<td>63.6%</td>
<td>18.4%</td>
</tr>
<tr>
<td>Sport organisations have become more professional in recent years</td>
<td>83.4%</td>
<td>8.5%</td>
</tr>
<tr>
<td>The sector is changing and evolving, as a result the skills needed by those working in the sector will change too</td>
<td>71%</td>
<td>12.3%</td>
</tr>
<tr>
<td>In the future there will be a demand for a better qualified workforce operating in sport organisations</td>
<td>56.6%</td>
<td>23.5%</td>
</tr>
<tr>
<td>It is difficult to find and recruit people with the right skills to work as paid staff</td>
<td>53.5%</td>
<td>27.8%</td>
</tr>
<tr>
<td>It is difficult to find and recruit people with the right skills to work as volunteers</td>
<td>71.8%</td>
<td>19.4%</td>
</tr>
<tr>
<td>It is important that staff have access to ongoing training to keep their skills up to date</td>
<td>91%</td>
<td>3.1%</td>
</tr>
<tr>
<td>New training courses are required to meet the training needs of sport organisations</td>
<td>66.3%</td>
<td>21.2%</td>
</tr>
<tr>
<td>Universities/ training providers should work more closely with sport organisations</td>
<td>79.3%</td>
<td>6%</td>
</tr>
<tr>
<td>It is difficult to progress from a technical role (e.g. as a coach or instructor) to a management position</td>
<td>56.4%</td>
<td>29.2%</td>
</tr>
<tr>
<td>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)</td>
<td>79.3%</td>
<td>12.2%</td>
</tr>
<tr>
<td>Staff would benefit from learning experiences in other countries</td>
<td>38.2%</td>
<td>29.1%</td>
</tr>
</tbody>
</table>

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 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 National 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.

www.essa-sport.eu
www.eose.org

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PARTNERSHIP