



ESSA-SPORT

Improving the Supply of Skills to the Sector



GERMANY

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

**YEAR
2019**



Source: Eurostat (2018)

Population and Employment

TOTAL POPULATION
82 792 351

TOTAL EMPLOYMENT*
40 636 000

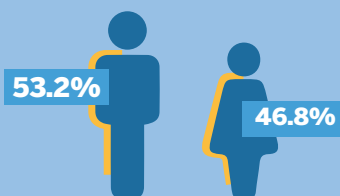
75.9% of the population
aged 15-64

TOTAL UNEMPLOYMENT*
1 468 000

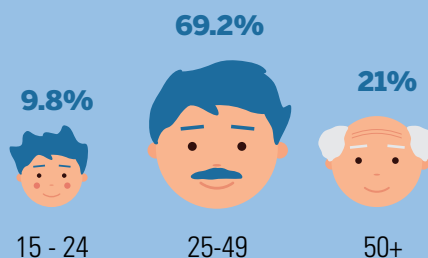
3.4% of the active
population

*persons aged between 15 to 64 years old

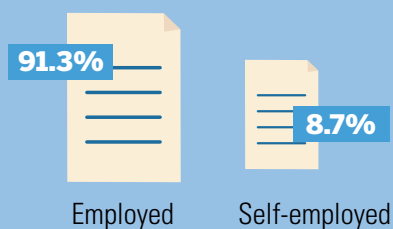
Total employment - Gender



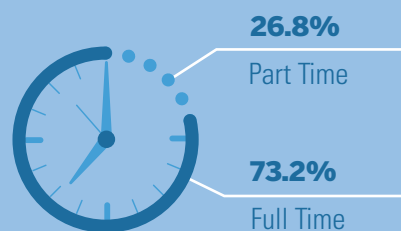
Total employment - Age



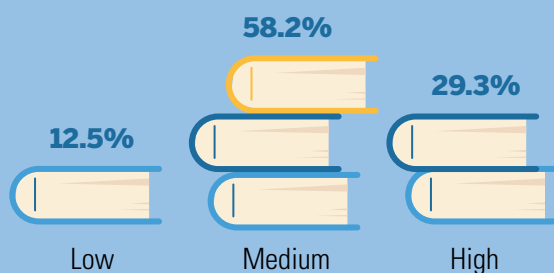
Total employment - Type of employment



Total employment - Type of contract



Total employment - Level of education*



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

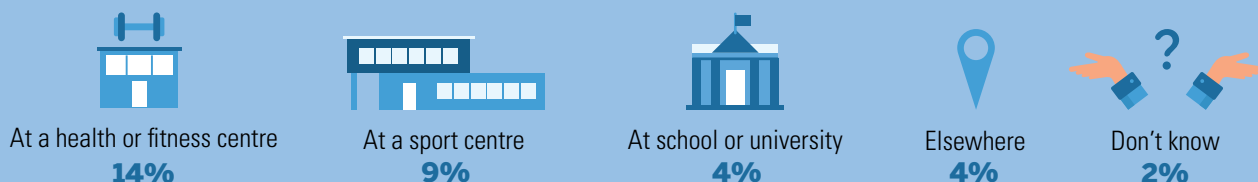
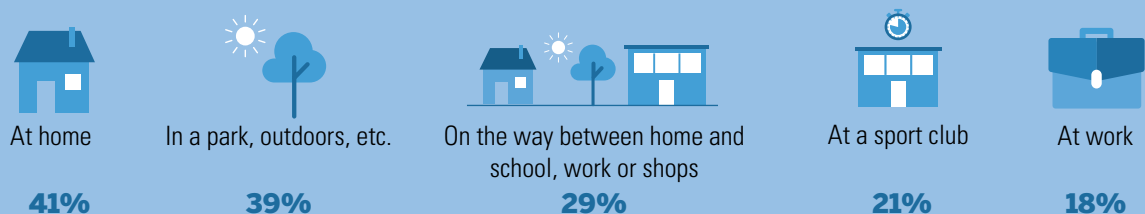
	ISCED 2011 (data from 2014 onwards)
Low education	Levels 0-2
Medium education	Levels 3-4
High education	Levels 5-8

Source: Special Eurobarometer 472 on Sport and physical activity (Publication March 2018) - n=1592

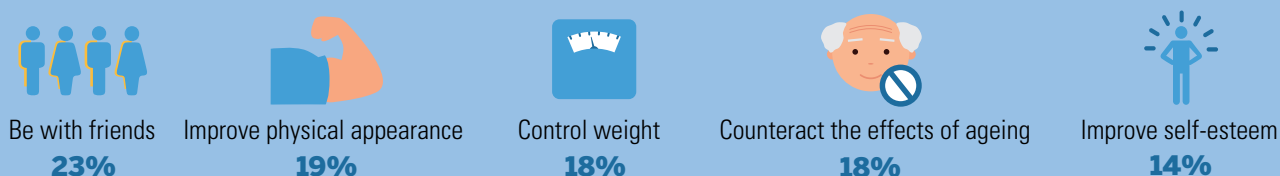
Level of practice of sport or physical activity



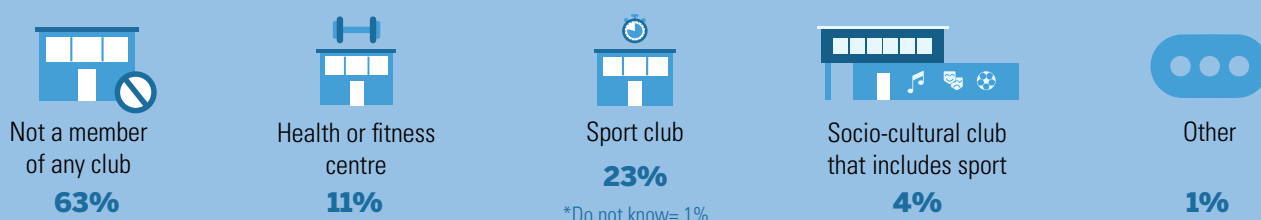
Place of practice of those engaged in sport and physical activity



Reasons for engaging in sport or physical activity



Membership of clubs where people participate in sport or recreational physical activity



Level of engagement in voluntary work that supports sport and physical activity





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)



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



National sport labour market Vs National total employment



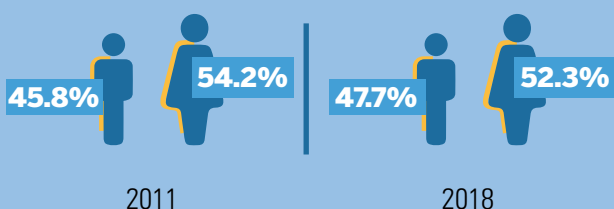
- Top 3 countries in 2018



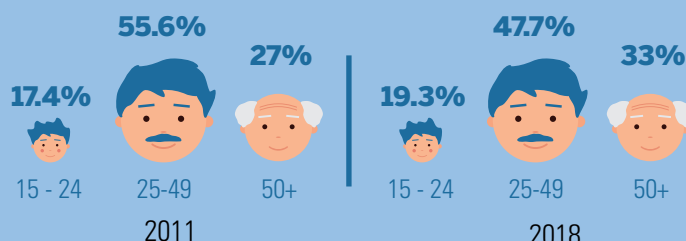
- Bottom 3 countries in 2018



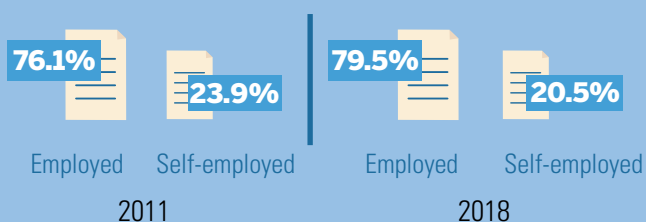
National sport labour market - Gender



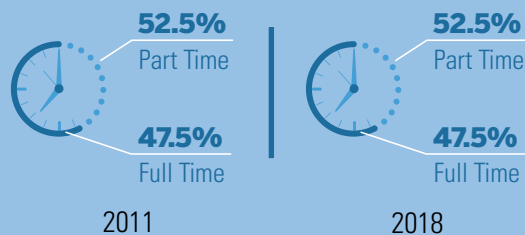
National sport labour market - Age



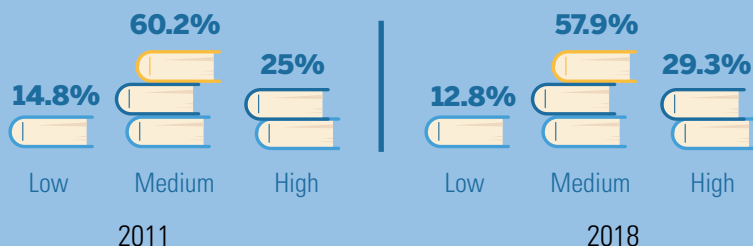
National sport labour market - Type of employment



National sport labour market - Type of contract



National 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

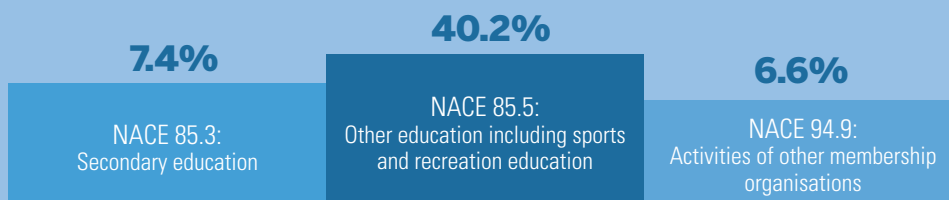
3.2 FOCUS ON SPORT SPECIFIC OCCUPATIONS (ISCO 342)

(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)



Top 3 of the other NACE codes where sport specific occupations are engaged in 2016



Variance from 2014 to 2018



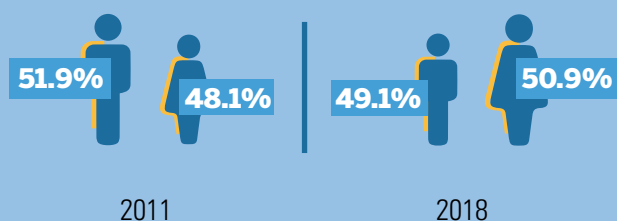
Proportion of sport occupation in 2018



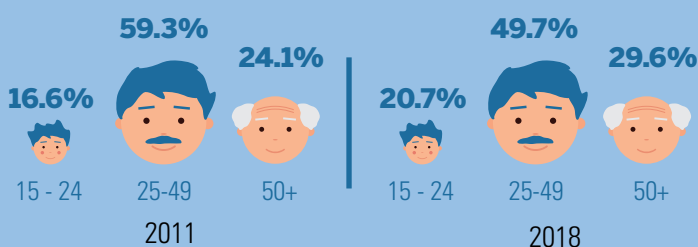
CHARACTERISTICS OF PEOPLE HAVING A SPORT SPECIFIC OCCUPATION - ISCO 342

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

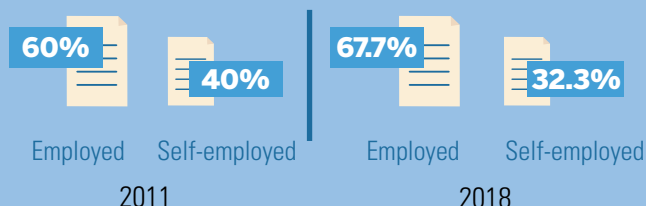
Total sport specific occupation - Gender



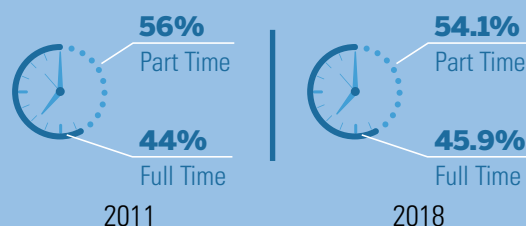
Total sport specific occupation - Age



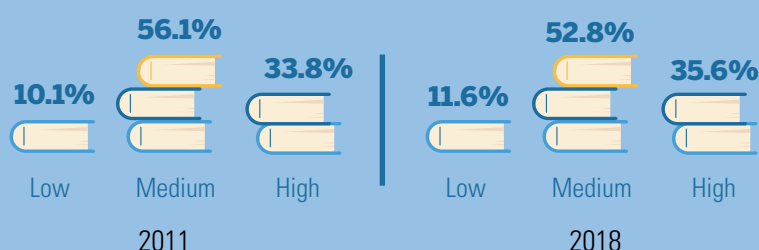
Total sport specific occupation - Type of employment



Total sport specific occupation - Type of contract



Total sport specific occupation - Level of Education*



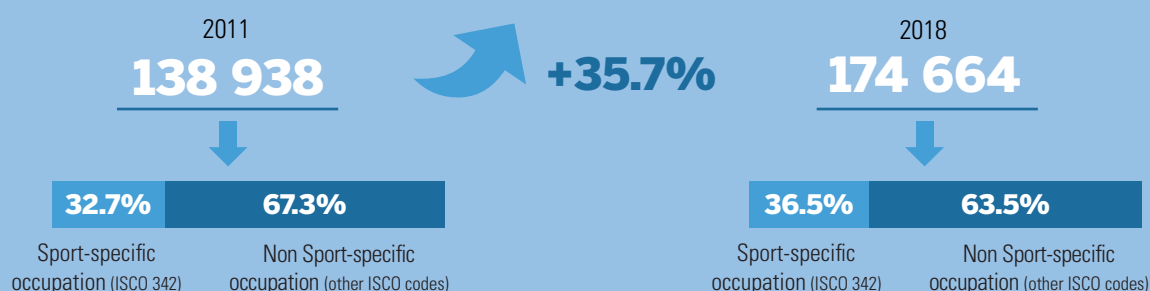
* The statistics on level of education collated from Eurostat refer to ISCED level:

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Low education	Levels 0-2	Levels 0-2
Medium education	Levels 3-4	Levels 3-4
High education	Levels 5-8	Levels 5-6

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)



Occupations engaged within sport organisations (NACE 93.1) - 2016

	ISCO 1 – Managers (e.g. directors, CEO)	8.3%
	ISCO 2 – Professionals (Health professionals, communication professionals, journalists, lawyers)	5.4%
	ISCO 3 - Technicians and associate professionals (incl. sport and fitness workers)	44.1%
	ISCO 4 - Clerical Support Workers (e.g. secretaries, receptions, bookkeepers)	9.8%
	ISCO 5 - Service and sales workers (e.g. conductors, cooks, waiters, lifeguards, sales workers)	18.8%
	ISCO 6 - Skilled agricultural and fishery workers (e.g. animal producers, market gardeners)	1.3%
	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)	0.7%
	ISCO 9 - Elementary occupations (e.g. office cleaners, labourers, deliverers)	9.9%

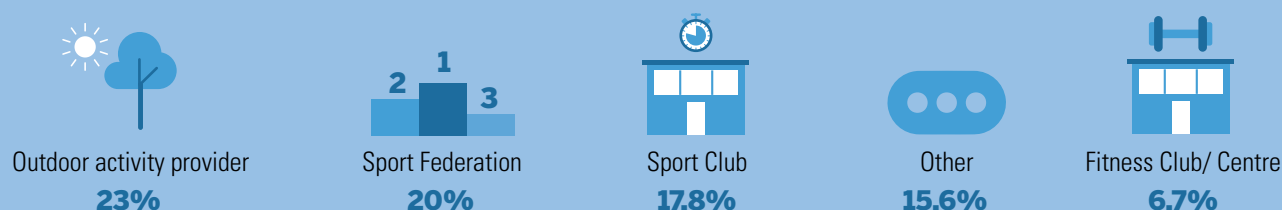
This section presents the main national results and key information from the first ever European Employer Skills Survey for the sport and physical activity sector. The goal was to consult the widest variety of employers to collate data on realities and difficulties to recruit and retain staff and volunteers 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 **135 responses** from your country.

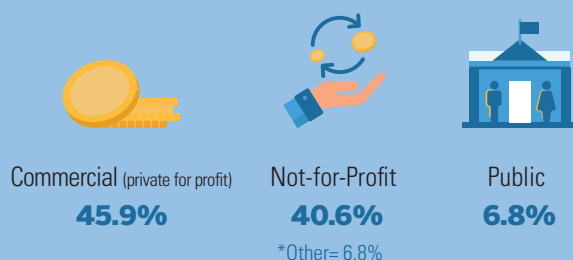
Important: the analysis provides an elaboration of all responses collated through the survey and so should be taken into consideration carefully as it is not necessary the exact reality and the exact picture of the whole sector.

4.1 THE PROFILE OF RESPONDENTS TO THE SURVEY

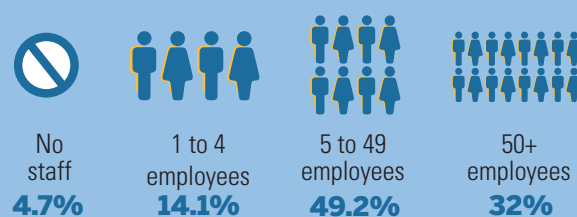
Top 5 type of respondents - n=135



Status of respondents - n=133



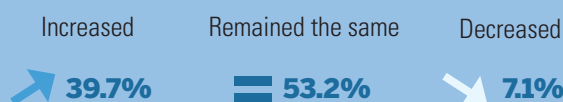
Size of organisations - n=128



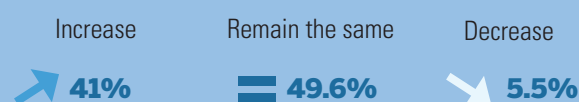
4.2 EMPLOYMENT AND PRIORITY SKILLS FOR DEVELOPMENT

A positive forecast for the sector workforce

- Compared to 12 months ago, the number of employees in respondents' organisation has: n=126



- Over the next 2 years, respondents think that the workforce of their organisation will: n=127



*Do not know= 3.9%

Occupations engaged in respondents' organisation - n=128

1		Clerical and Office staff	81.3%
2		Senior Management staff	71.1%
3		Middle Management staff	61.7%
4		Sport coaches	55.5%
5		Operational staff	53.1%
6		Outdoor activity leaders and animators	40.6%
7		Fitness Instructors / Personal Trainers	35.2%
8		Athletes and Players	30.5%
9		Sport officials	25%

Skills and attributes

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

4.3 RECRUITMENT REALITIES AND CHALLENGES

Recruitment of a paid employee in the past 12 months - n=101

*Do not know= 5%

80.2%
YES

14.8%
NO

36%
NO

47%
YES

17%
DO NOT KNOW



Difficulties to fill vacancies - n=100

Top 3 difficulties when recruiting - n=77

62.3%

Low number of applicants with the required skills

46.8%

Low numbers of applicants with required motivation and attitude

41.6%

Low number of applicants generally

Top 3 hardest roles to fill - n=45

46.7%

Sport Coaches

44.4%

Operational staff

44.4%

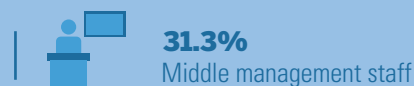
Outdoor activity leaders and animators

4.4 RETENTION REALITIES AND CHALLENGES

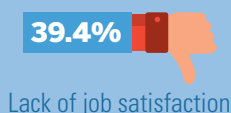
Difficulties retaining staff - n=100



• Hardest roles to retain (top 3) - n=32



• Top 5 difficulties expressed for retaining staff - n=33



4.5 ENGAGEMENT OF VOLUNTEERS

Engagement of volunteers in a typical year - n=127



* Do not know= 4.7%



Expectations of volunteers and paid staff

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

• Sport officials n=31

64.5% Yes **35.5% No**

• Outdoor activity leaders and animators n=49

57.1% Yes **42.9% No**

• Sports Coaches n=87

52.9% Yes **47.1% No**

• Clerical and office staff / receptionists n=66

47% Yes **53% No**

• Operational staff n=58

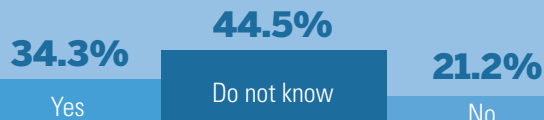
46.6% Yes **53.4% No**

• Senior and middle management staff n=53

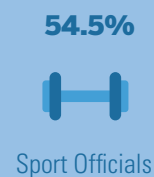
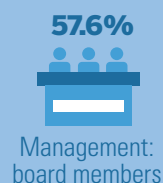
47.1% Yes **52.9% No**

Problems in engaging volunteers and for which occupations

• Any particular problem engaging volunteers n=99



• Top 3 occupations where there are problems engaging volunteers n=33



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



43.2%



27.4%

- Sport organisations have become more professional in recent years



73.7%



13.7%

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



80%



11.6%

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



75.8%



13.7%

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



63.2%



26.3%

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



51.6%



13.7%

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



90.5%



2.1%

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



68.4%



21.1%

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



74.7%



10.5%

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



53.7%



29.5%

- 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)



53.7%



22.1%

- Staff would benefit from learning experiences in other countries



54.7%



30.5%

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 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.



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PARTNERSHIP



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