ITALY

NATIONAL LABOUR MARKET AND WORKFORCE DEVELOPMENT PRIORITIES FOR THE SPORT AND PHYSICAL ACTIVITY SECTOR
THE OVERALL NATIONAL LABOUR MARKET IN 2018

Source: Eurostat (2018)

TOTAL POPULATION
60 483 973

TOTAL EMPLOYMENT*
22 586 000
58.5% of the population aged 15-64

TOTAL UNEMPLOYMENT*
2 755 000
10.6% of the active population

*persons aged between 15 to 64 years old

** Population and Employment **

** Total employment - Gender **

57.6% Male
42.4% Female

** Total employment - Age **

15 - 24: 18.4%
25-49: 76.2%
50+: 19.2%

** Total employment - Type of employment **

79.5% Employed
20.5% Self-employed

** Total employment - Type of contract **

18.4% Part Time
81.6% Full Time

** Total employment - Level of education**

30.2% Low education
46.8% Medium education
23% High education

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

ISCED 2011 (data from 2014 onwards)

- Low education
- Medium education
- High education

<table>
<thead>
<tr>
<th>Levels</th>
<th>ISCED 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Levels 0-2</td>
<td>Levels 5-8</td>
</tr>
<tr>
<td>Levels 3-4</td>
<td>Levels 5-8</td>
</tr>
</tbody>
</table>

ITALY
Level of practice of sport or physical activity

- Regularly (at least 5 times a week): 1%
- With some regularity (1 to 4 times a week): 27%
- Seldom (3 times a month or less): 10%
- Never: 62%

Place of practice of those engaged in sport and physical activity

- In a park, outdoors, etc.: 35%
- At a sport centre: 27%
- On the way between home and school, work or shops: 19%
- At home: 16%
- At a health or fitness centre: 15%
- At a sport club: 6%
- Elsewhere: 6%
- At work: 4%
- At school or university: 3%
- Don't know: 1%

Reasons for engaging in sport or physical activity

- Improve health: 43%
- Improve fitness: 42%
- Relax: 36%
- Improve physical appearance: 33%
- Control weight: 23%
- Be with friends: 19%
- Have fun: 19%
- Improve physical performance: 19%
- Counteract the effects of ageing: 15%
- Improve self-esteem: 6%

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

- Not a member of any club: 72%
- Health or fitness centre: 7%
- Sport club: 5%
- Socio-cultural club that includes sport: 2%
- Other: 13%

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

- 2% YES
- 98% NO
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 Employment</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>104,809</td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>116,561</td>
<td>+11.2%</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 Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK</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>National Sport Employment</th>
<th>National Total Employment</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>0.47%</td>
<td>0.47%</td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>0.52%</td>
<td>0.52%</td>
<td>+0.05%</td>
</tr>
</tbody>
</table>

**Top 3 countries in 2018**

- Denmark: 1.70%
- France: 1.43%
- Finland: 1.30%

**Bottom 3 countries in 2018**

- Russia: 0.39%
- Turks and Caicos Islands: 0.39%
- Italy: 0.13%

### National sport labour market - Gender

<table>
<thead>
<tr>
<th>Year</th>
<th>Male</th>
<th>Female</th>
<th>Gender Distribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>61.3%</td>
<td>38.7%</td>
<td>100%</td>
</tr>
<tr>
<td>2018</td>
<td>59.1%</td>
<td>40.9%</td>
<td>100%</td>
</tr>
</tbody>
</table>

### National sport labour market - Age

<table>
<thead>
<tr>
<th>Year</th>
<th>Age Group</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>15-24</td>
<td>12.9%</td>
</tr>
<tr>
<td></td>
<td>25-49</td>
<td>74.1%</td>
</tr>
<tr>
<td></td>
<td>50+</td>
<td>13%</td>
</tr>
<tr>
<td>2018</td>
<td>15-24</td>
<td>13.3%</td>
</tr>
<tr>
<td></td>
<td>25-49</td>
<td>52.8%</td>
</tr>
<tr>
<td></td>
<td>50+</td>
<td>13.3%</td>
</tr>
</tbody>
</table>

**ITALY**
### National sport labour market - Type of employment

<table>
<thead>
<tr>
<th>Year</th>
<th>Employed</th>
<th>Self-employed</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>54%</td>
<td>46%</td>
</tr>
<tr>
<td>2018</td>
<td>54.8%</td>
<td>45.2%</td>
</tr>
</tbody>
</table>

### National sport labour market - Type of contract

<table>
<thead>
<tr>
<th>Year</th>
<th>Part Time</th>
<th>Full Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>39%</td>
<td>61%</td>
</tr>
<tr>
<td>2018</td>
<td>50.4%</td>
<td>49.6%</td>
</tr>
</tbody>
</table>

### National sport labour market - Level of education*

<table>
<thead>
<tr>
<th>Year</th>
<th>Low</th>
<th>Medium</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>19%</td>
<td>22.3%</td>
<td>58.7%</td>
</tr>
<tr>
<td>2018</td>
<td>17.1%</td>
<td>32.6%</td>
<td>50.3%</td>
</tr>
</tbody>
</table>

* 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 Levels 0-2</td>
<td>Low education Levels 0-2</td>
</tr>
<tr>
<td>Medium education Levels 3-4</td>
<td>Medium education Levels 3-4</td>
</tr>
<tr>
<td>High education Levels 5-8</td>
<td>High education Levels 5-8</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)

- **2011**
  - 66,204
  - 58.3% Engaged in a sport organisation (NACE 93.1)
  - 41.7% Engaged in an organisation whose main business is not the provision of sport (other NACE codes)

- **2018**
  - 72,438
  - 57.1% Engaged in a sport organisation (NACE 93.1)
  - 42.9% Engaged in an organisation whose main business is not the provision of sport (other NACE codes)

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

- **6.7%** NACE 93.2: Amusement and recreation activities
- **54.3%** NACE 85.5: Other education including sports and recreation education
- **6%** NACE 94.9: Activities of other membership organisations

#### Variance from 2017 to 2018

- Athletes and Sports Players ISCO 3421: -35.9%
- Sports Coaches, Instructors and Officials ISCO 3422: -11.6%
- Fitness and Recreation Instructors & Programme Leaders - ISCO 3423: -6.1%

#### Proportion of sport occupation in 2018

- Athletes and Sports Players ISCO 3421: 4.5%
- Sports Coaches, Instructors and Officials ISCO 3422: 78.1%
- Fitness and Recreation Instructors and Programme Leaders - ISCO 3423: 17.4%
### Total sport specific occupation - Gender

- **2011**: 65.9% Male, 34.1% Female
- **2018**: 62.3% Male, 37.7% Female

### Total sport specific occupation - Age

- **2011**: 14.1% 15-24, 75.9% 25-49, 10% 50+
- **2018**: 16.6% 15-24, 63% 25-49, 20.4% 50+

### Total sport specific occupation - Type of employment

- **2011**: Employed 46.5%, Self-employed 53.5%
- **2018**: Employed 47.2%, Self-employed 52.8%

### Total sport specific occupation - Type of contract

- **2011**: Full Time 57.6%, Part Time 42.4%
- **2018**: Full Time 46.4%, Part Time 53.6%

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

- **2011**: Low Education 13.3%, Medium Education 60.7%, High Education 26%
- **2018**: Low Education 11.7%, Medium Education 49.1%, High Education 39.2%

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

- ISCED 2011 (data from 2014 onwards)
  - Levels 0-2
  - Levels 3-4
  - Levels 5-6
- ISCED 1997 (data up to 2013)
  - Levels 0-2
  - Levels 3-4
  - 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)

- **2011**: 77,225
- **2018**: 85,470

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

- **ISCO 1** - Managers (e.g. directors, CEO): 5.4%
- **ISCO 2** - Professionals (e.g. health professionals, communication professionals, journalists, lawyers): 4.2%
- **ISCO 3** - Technicians and associate professionals (incl. sport and fitness workers): 57.1%
- **ISCO 4** - Clerical Support Workers (e.g. secretaries, receptions, bookkeepers): 12.8%
- **ISCO 5** - Service and sales workers (e.g. conductors, cooks, waiters, lifeguards, sales workers): 8.2%
- **ISCO 6** - Skilled agricultural and fishery workers (e.g. animal producers, market gardeners): 2.3%
- **ISCO 7** - Craft and related trades workers (e.g. building workers, painters, cleaners, bicycle repairers): N/A
- **ISCO 8** - Plant and machine operators and assemblers (e.g. car, van, bus drivers, machine operators): N/A
- **ISCO 9** - Elementary occupations (e.g. office cleaners, labourers, deliverers): 10%
4. SKILLS NEEDS AND TENDENCIES FOR THE SPORT AND PHYSICAL ACTIVITY SECTOR

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 113 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=112

<table>
<thead>
<tr>
<th>Type of Respondent</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sport Club</td>
<td>52.7%</td>
</tr>
<tr>
<td>Sport Federation</td>
<td>23.2%</td>
</tr>
<tr>
<td>Fitness Club/ Centre</td>
<td>5.4%</td>
</tr>
<tr>
<td>Sport for all organisation</td>
<td>4.5%</td>
</tr>
<tr>
<td>University/College</td>
<td>3.6%</td>
</tr>
</tbody>
</table>

Status of respondents - n=108

<table>
<thead>
<tr>
<th>Status of Organisations</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not-for-Profit</td>
<td>47.2%</td>
</tr>
<tr>
<td>Public</td>
<td>17.6%</td>
</tr>
<tr>
<td>Commercial (private for profit)</td>
<td>14.8%</td>
</tr>
</tbody>
</table>

Size of organisations - n=101

<table>
<thead>
<tr>
<th>Size of Organisation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No staff</td>
<td>34.7%</td>
</tr>
<tr>
<td>1 to 4 employees</td>
<td>17.8%</td>
</tr>
<tr>
<td>5 to 49 employees</td>
<td>35.6%</td>
</tr>
<tr>
<td>50+ employees</td>
<td>6.9%</td>
</tr>
</tbody>
</table>

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=99
  - Increased 25.3%
  - Remained the same 60.6%
  - Decreased 5%
  *Do not know= 9.1%

- Over the next 2 years, respondents think that the workforce of their organisation will: n=98
  - Increase 35.7%
  - Remain the same 38.8%
  - Decrease 5.1%
  *Do not know= 20.4%

Occupations engaged in respondents’ organisation - n=97

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Sport coaches</td>
<td>84.5%</td>
</tr>
<tr>
<td>2 Clerical and Office staff</td>
<td>68%</td>
</tr>
<tr>
<td>3 Athletes and Players</td>
<td>61.9%</td>
</tr>
<tr>
<td>4 Middle Management staff</td>
<td>57.7%</td>
</tr>
<tr>
<td>5 Sport officials</td>
<td>54.6%</td>
</tr>
<tr>
<td>6 Senior Management staff</td>
<td>52.6%</td>
</tr>
<tr>
<td>7 Operational staff</td>
<td>51.5%</td>
</tr>
<tr>
<td>8 Fitness Instructors / Personal Trainers</td>
<td>44.3%</td>
</tr>
<tr>
<td>9 Outdoor activity leaders and animators</td>
<td>41.2%</td>
</tr>
</tbody>
</table>

ITALY
4.3 RECRUITMENT REALITIES AND CHALLENGES

Recruitment of a paid employee in the past 12 months - n=86

*Do not know= 22.1%

- 25.6% YES
- 52.3% NO
- 14% YES
- 39.5% NO
- 46.5% DO NOT KNOW

Difficulties to fill vacancies - n=86

Top 3 difficulties when recruiting - n=55

- 36.4% Unattractive terms and conditions (e.g. wage) offered for this post
- 27.3% Low number of applicants with required motivation and attitude
- 25.5% Lack of the level of work experience expected by the organisation

Top 3 roles to fill - n=12

- 50% Sport Coaches
- 75% Clerical and office staff
- 50% Senior Management staff

ITALY
4.4 RETENTION REALITIES AND CHALLENGES

**Difficulties retaining staff** - n=83

- **12%** Yes
- **42.2%** No
- **45.8%** Do not know

- **Hardest roles to retain (top 3)** - n=10
  - **70%** Sport Coaches
  - **50%** Senior management staff
  - **50%** Middle management staff

- **Top 5 difficulties expressed for retaining staff** - n=9
  - **55.6%** Lack of career progression/pathways
  - **44.4%** Better pay by other organisations
  - **33.3%** Lack of job satisfaction
  - **33.3%** Lack of financial stability for the organisation
  - **33.3%** Unattractive conditions of employment

4.5 ENGAGEMENT OF VOLUNTEERS

**Engagement of volunteers in a typical year** - n=100

- **66%** Organisations engaging volunteers
- **19%** Organisations not engaging volunteers

**Expectations of volunteers and paid staff**

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

- **Sport officials** - n=34
  - **79.4%** Yes
  - **20.6%** No

- **Outdoor activity leaders and animators** - n=37
  - **70.3%** Yes
  - **29.7%** No

- **Sports Coaches** - n=71
  - **66.2%** Yes
  - **33.8%** No

- **Clerical and office staff / receptionists** - n=41
  - **53.7%** Yes
  - **46.3%** No

- **Operational staff** - n=34
  - **58.8%** Yes
  - **41.2%** No

- **Senior and middle management staff** - n=26
  - **52.7%** Yes
  - **47.3%** No

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

- **Any particular problem engaging volunteers** - n=83
  - **24.1%** Yes
  - **60.2%** No
  - **15.7%** Do not know

- **Top 3 occupations where there are problems engaging volunteers**
  - Sport Coaches: **35%**
  - Clerical & office staff: **35%**
  - Sport Officials: **30%**
### Key Issues and Challenges for the Sport and Physical Activity Sector - n=82

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expectations and priorities from national governments on sport organisations are increasing</td>
<td>48.8%</td>
<td>35.4%</td>
</tr>
<tr>
<td>Sport organisations have become more professional in recent years</td>
<td>81.7%</td>
<td>14.6%</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>76.8%</td>
<td>13.4%</td>
</tr>
<tr>
<td>In the future there will be a demand for a better qualified workforce operating in sport organisations</td>
<td>79.3%</td>
<td>6.1%</td>
</tr>
<tr>
<td>It is difficult to find and recruit people with the right skills to work as paid staff</td>
<td>36.6%</td>
<td>36.6%</td>
</tr>
<tr>
<td>It is difficult to find and recruit people with the right skills to work as volunteers</td>
<td>58.5%</td>
<td>28.1%</td>
</tr>
<tr>
<td>It is important that staff have access to ongoing training to keep their skills up to date</td>
<td>93.9%</td>
<td>3.7%</td>
</tr>
<tr>
<td>New training courses are required to meet the training needs of sport organisations</td>
<td>87.8%</td>
<td>7.3%</td>
</tr>
<tr>
<td>Universities/ training providers should work more closely with sport organisations</td>
<td>87.8%</td>
<td>6.1%</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>59.8%</td>
<td>30.5%</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>86.6%</td>
<td>2.4%</td>
</tr>
<tr>
<td>Staff would benefit from learning experiences in other countries</td>
<td>64.6%</td>
<td>11%</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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