NETHERLANDS

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
17,181,084

TOTAL EMPLOYMENT*
8,543,000
77.2% of the population aged 15-64

TOTAL UNEMPLOYMENT*
350,000
3.8% of the active population

*persons aged between 15 to 64 years old

Total employment - Gender

53% Male
47% Female

Total employment - Age

66.2%
15.7%
18.1%
15 - 24
25-49
50+

Total employment - Type of contract

50.1%
49.9%
Part Time
Full Time

Total employment - Type of employment

84.5%
15.5%
Employed
Self-employed

Total employment - Level of education*

41.9%
37.8%
20.3%
Low
Medium
High

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

ISCED 2011 (data from 2014 onwards)

<table>
<thead>
<tr>
<th>Level of Education</th>
<th>ISCED 2011</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>
</tbody>
</table>

NETHERLANDS
Level of practice of sport or physical activity

- Regularly (at least 5 times a week): 6%
- With some regularity (1 to 4 times a week): 51%
- Seldom (3 times a month or less): 12%
- Never: 31%

Place of practice of those engaged in sport and physical activity

- In a park, outdoors, etc.: 41%
- On the way between home and school, work or shops: 39%
- At home: 31%
- At a sport club: 24%
- At a sport centre: 16%
- At a health or fitness centre: 16%
- At work: 16%
- Elsewhere: 6%
- At school or university: 5%
- Don’t know: 0%

Reasons for engaging in sport or physical activity

- Have fun: 65%
- Improve fitness: 64%
- Improve health: 63%
- Relax: 63%
- Control weight: 42%
- Improve physical performance: 28%
- Counteract the effects of ageing: 23%
- Be with friends: 22%
- Improve physical appearance: 13%
- Improve self-esteem: 10%

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

- Not a member of any club: 47%
- Sport club: 27%
- Health or fitness centre: 22%
- Socio-cultural club that includes sport: 3%
- Other: 7%

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

- 19% YES
- 81% 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 Sport Employment</th>
<th>Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>64,006</td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>75,671</td>
<td>+18.2%</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>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Kingdom</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>Sport Employment Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>0.79%</td>
</tr>
<tr>
<td>2018</td>
<td>+0.10%</td>
</tr>
</tbody>
</table>

Top 3 countries in 2018

<table>
<thead>
<tr>
<th>Country</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denmark</td>
<td>1.70%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>1.43%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>1.30%</td>
</tr>
</tbody>
</table>

Bottom 3 countries in 2018

<table>
<thead>
<tr>
<th>Country</th>
<th>Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Russia</td>
<td>0.39%</td>
</tr>
<tr>
<td>Spain</td>
<td>0.39%</td>
</tr>
<tr>
<td>United Kingdom</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>2011</td>
<td>52.3%</td>
<td>47.7%</td>
</tr>
<tr>
<td>2018</td>
<td>51.2%</td>
<td>48.8%</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>2011</td>
<td>29.6%</td>
<td>47.9%</td>
<td>22.5%</td>
</tr>
<tr>
<td>2018</td>
<td>33.8%</td>
<td>41.9%</td>
<td>24.3%</td>
</tr>
</tbody>
</table>

NETHERLANDS
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</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>32,580</td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>46,639</td>
<td>+43.2%</td>
</tr>
</tbody>
</table>

- **Engaged in a sport organisation (NACE 93.1)**
  - 2011: 62.7%
  - 2018: 34%

- **Engaged in an organisation whose main business is not the provision of sport (other NACE codes)**
  - 2011: 37.3%
  - 2018: 66%

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

- **NACE 93.2**: Amusement and recreation activities
  - 2018: 4.3%
- **NACE 85.5**: Other education including sports and recreation education
  - 2018: 26.6%
- **NACE 55.3**: Camping grounds, recreational vehicle parks and trailer parks
  - 2018: 4.2%

**Variance from 2014 to 2018**

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Athletes and Sports Players (ISCO 3421)</td>
<td>+20.7%</td>
</tr>
<tr>
<td>Sports Coaches, Instructors and Officials (ISCO 3422)</td>
<td>+8.9%</td>
</tr>
<tr>
<td>Fitness and Recreation Instructors &amp; Programme Leaders (ISCO 3423)</td>
<td>+55.4%</td>
</tr>
</tbody>
</table>

**Proportion of sport occupation in 2018**

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Proportion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Athletes and Sports Players (ISCO 3421)</td>
<td>4.8%</td>
</tr>
<tr>
<td>Sports Coaches, Instructors and Officials (ISCO 3422)</td>
<td>54.8%</td>
</tr>
<tr>
<td>Fitness and Recreation Instructors and Programme Leaders (ISCO 3423)</td>
<td>39.8%</td>
</tr>
</tbody>
</table>
CHARACTERISTICS OF PEOPLE HAVING A SPORT SPECIFIC OCCUPATION - ISCO 342

### Total sport specific occupation - Gender

<table>
<thead>
<tr>
<th>Year</th>
<th>2011</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td>56.1%</td>
<td>51.1%</td>
</tr>
<tr>
<td></td>
<td>43.9%</td>
<td>48.9%</td>
</tr>
</tbody>
</table>

### Total sport specific occupation - Age

<table>
<thead>
<tr>
<th>Year</th>
<th>2011</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>15-24</td>
<td>32.5%</td>
<td>49.5%</td>
</tr>
<tr>
<td>25-49</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>50+</td>
<td>35.5%</td>
<td>48.8%</td>
</tr>
</tbody>
</table>

### Total sport specific occupation - Type of employment

<table>
<thead>
<tr>
<th>Year</th>
<th>2011</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employed</td>
<td>74.2%</td>
<td>66.2%</td>
</tr>
<tr>
<td>Self-employed</td>
<td>25.8%</td>
<td>33.8%</td>
</tr>
</tbody>
</table>

### Total sport specific occupation - Type of contract

<table>
<thead>
<tr>
<th>Year</th>
<th>2011</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Time</td>
<td>72.8%</td>
<td>77.7%</td>
</tr>
<tr>
<td>Part Time</td>
<td>27.2%</td>
<td>22.3%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Year</th>
<th>2011</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low</td>
<td>28.1%</td>
<td>53.5%</td>
</tr>
<tr>
<td>Medium</td>
<td>18.4%</td>
<td>18.2%</td>
</tr>
<tr>
<td>High</td>
<td>53.6%</td>
<td>28.2%</td>
</tr>
</tbody>
</table>

* 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)

### 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)

<table>
<thead>
<tr>
<th>Year</th>
<th>2011</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>51,867</td>
<td>44,868</td>
</tr>
<tr>
<td>Sport-specific occupation (ISCO 342)</td>
<td>39.4%</td>
<td>35.3%</td>
</tr>
<tr>
<td>Non Sport-specific occupation (other ISCO codes)</td>
<td>60.6%</td>
<td>64.7%</td>
</tr>
</tbody>
</table>

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

- **ISCO 1 - Managers (e.g. directors, CEO)**: 6.3%
- **ISCO 2 - Professionals (Health professionals, communication professionals, journalists, lawyers)**: 9.6%
- **ISCO 3 - Technicians and associate professionals (incl. sport and fitness workers)**: 46.1%
- **ISCO 4 - Clerical Support Workers (e.g. secretaries, receptions, bookkeepers)**: 6.3%
- **ISCO 5 - Service and sales workers (e.g. conductors, cooks, waiters, lifeguards, sales workers)**: 23.8%
- **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)**: 1.2%
- **ISCO 8 - Plant and machine operators and assemblers (e.g. car, van, bus drivers, machine operators)**: 0.4%
- **ISCO 9 - Elementary occupations (e.g. office cleaners, labourers, deliverers)**: 5%
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 59 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=59

- Sport Federation: 49.2%
- Sport Club: 22%
- Sport body: 6.8%
- Network association (umbrella organisation): 6.8%
- Sport for all organisation: 5.1%

Status of respondents - n=56

- Not-for-Profit: 62.5%
- Public: 10.7%
- Commercial (private for profit): 5.4%

*Other: 21.4%

Size of organisations - n=56

- No staff: 30.4%
- 1 to 4 employees: 8.9%
- 5 to 49 employees: 39.3%
- 50+ employees: 21.4%

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: 26.4%
  - Remained the same: 56.6%
  - Decreased: 13.2%

- Over the next 2 years, respondents think that the workforce of their organisation will:
  - Increase: 35.9%
  - Remain the same: 52.8%
  - Decrease: 7.5%

*Do not know: 3.8%

Occupations engaged in respondents’ organisation - n=54

1. Senior Management staff: 79.6%
2. Clerical and Office staff: 77.8%
3. Middle Management staff: 75.9%
4. Sport coaches: 63%
5. Operational staff: 55.6%
6. Sport officials: 53.7%
7. Athletes and Players: 40.7%
8. Fitness Instructors / Personal Trainers: 25.9%
9. Outdoor activity leaders and animators: 22.2%
### 4.3 RECRUITMENT REALITIES AND CHALLENGES

#### Recruitment of a paid employee in the past 12 months - n=45

- **62.2% YES** if **37.8% NO**
- **55.5% YES** if **28.9% DO NOT KNOW**

#### Difficulties to fill vacancies - n=45

- **55.5% YES**
- **15.6% NO**
- **37.8% DO NOT KNOW**

#### Top 3 difficulties when recruiting - n=18

1. **44.4%** Low number of applicants with the required skills
2. **33.3%** Unattractive terms and conditions (e.g. wage) offered for this post
3. **22.2%** Lack of the level of work experience expected by the organisation

#### Top 3 hardest roles to fill - n=6

1. **66.7%** Middle Management staff
2. **50%** Sport Coaches
3. **33.3%** Senior Management staff

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### Skills and attributes

<table>
<thead>
<tr>
<th>5 most important skills and attributes</th>
<th>5 weakest skills and attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Team working skills</td>
<td>1. Use of technology, equipment and tools</td>
</tr>
<tr>
<td>2. Sport specific knowledge and skills</td>
<td>2. Plan coaching sessions and programmes</td>
</tr>
<tr>
<td>3. Motivational skills</td>
<td>3. Ability to work with different participants</td>
</tr>
<tr>
<td>4. Clearly communicate instructions</td>
<td>4. Evaluate performance and provide feedback</td>
</tr>
<tr>
<td>5. Evaluate performance and provide feedback</td>
<td>5. Motivational skills</td>
</tr>
</tbody>
</table>

**Sport coaches**

1. Communicating effectively with participants
2. Designing sessions and programmes
3. Understand participant needs
4. Motivational skills
5. Team working skills

**Outdoor activity leaders & animators**

1. Ability to work with people with disabilities
2. Use of technology, equipment and tools
3. Ability to work with different participants
4. Provide appropriate feedback
5. Ensure health and safety of participants

**Fitness instructors/personal trainers**

1. Team working skills
2. Communicating effectively with participants
3. Customer service skills
4. Understand participant needs
5. Designing sessions and programmes

**Sport Officials (e.g., referees, judges)**

1. Managing conflict
2. Information/Communication Technology (ICT) skills
3. Customer service skills
4. Team working skills
5. Uphold integrity and fair play

**Senior and middle management staff**

1. Leading change
2. Leadership skills
3. Marketing and sales skills
4. Information/Communication Technology (ICT) skills
5. Strategic thinking

**Operational staff**

1. Information/Communication Technology (ICT) skills
2. Technical skills and knowledge required for their role
3. Communication skills
4. Problem-solving skills
5. Organisational and work planning skills

**Clerical and office staff / receptionists**

1. Information/Communication Technology (ICT) skills
2. Use of technology, equipment and tools
3. Communication skills
4. Problem-solving skills
5. Customer service skills
4.4 RETENTION REALITIES AND CHALLENGES

**Difficulties retaining staff - n=45**

- 13.3% Yes
- 66.7% No
- 20% Do not know

**Hardest roles to retain (top 3) - n=5**

- 60% Middle Management staff
- 40% Senior management staff
- 40% Clerical and office staff

**Top 5 difficulties expressed for retaining staff - n=4**

- 50% Lack of job satisfaction
- 50% Geographic location
- 50% Unable to meet the skill requirements of the job
- 25% Better pay by other organisations
- 25% Better pay offered in other job roles

4.5 ENGAGEMENT OF VOLUNTEERS

**Engagement of volunteers in a typical year - n=56**

- 83.9% Organisations engaging volunteers
- 16.1% Organisations not engaging volunteers

**Expectations of volunteers and paid staff**

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

- **Sport officials**
  - n=14
  - 64.3% Yes
  - 35.7% No

- **Outdoor activity leaders and animators**
  - n=5
  - 40% Yes
  - 60% No

- **Sports Coaches**
  - n=26
  - 57.7% Yes
  - 42.3% No

- **Clerical and office staff / receptionists**
  - n=28
  - 57.1% Yes
  - 42.9% No

- **Operational staff**
  - n=14
  - 50% Yes
  - 50% No

- **Senior and middle management staff**
  - n=27
  - 38.1% Yes
  - 61.9% No

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

- **Any particular problem engaging volunteers**
  - n=45
  - 31.1% No
  - 42.2% Yes
  - 26.7% Do not know

- **Top 3 occupations where there are problems engaging volunteers**
  - 68.4% Management: board members
  - 52.6% Sport Officials
  - 52.6% Operational staff
### Key Issues and Challenges for the Sport and Physical Activity Sector

**- n=44**

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

- Yes: 75%
- No: 11.4%

**Sport organisations have become more professional in recent years**

- Yes: 72.7%
- No: 20.5%

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

- Yes: 90.9%
- No: 4.6%

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

- Yes: 79.6%
- No: 9.1%

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

- Yes: 52.3%
- No: 38.6%

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

- Yes: 56.8%
- No: 25%

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

- Yes: 93.2%
- No: 2.3%

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

- Yes: 47.7%
- No: 34.1%

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

- Yes: 77.3%
- No: 15.9%

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

- Yes: 43.2%
- No: 31.8%

**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)**

- Yes: 68.2%
- No: 27.3%

**Staff would benefit from learning experiences in other countries**

- Yes: 34.1%
- No: 47.7%

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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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