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

YEAR 2019
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
73.7% of the active population

TOTAL UNEMPLOYMENT* 16 885 000
6.8% of the active population

*persons aged between 15 to 64 years old

Total employment EU-28 - Gender

53.8% Employed
46.2% Self-employed

Total employment EU-28 - Age

74% 15 - 24
8.5% 25-49
17.5% 50+

Total employment EU-28 - Type of employment

85.4% Employed
14.6% Self-employed

Total employment EU-28 - Type of contract

19.2% Part Time
80.8% Full Time

Total employment EU-28 - Level of education*

47.8% Low education
17.1% Medium education
35.1% 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
Levels 5-2
Levels 3-4
Levels 5-8

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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)

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>1,481,306</td>
</tr>
<tr>
<td>2018</td>
<td>1,765,728</td>
</tr>
</tbody>
</table>

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

- England: 25.2%
- Germany: 14.4%
- Spain: 12%
- France: 10.4%

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Employment Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>0.70%</td>
</tr>
<tr>
<td>2018</td>
<td>0.79%</td>
</tr>
</tbody>
</table>

**Top 3 countries in 2018**

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

**Bottom 3 countries in 2018**

- Russia: 0.39%
- Hungary: 0.39%
- Estonia: 0.13%

### EU-28 sport labour market - Gender

<table>
<thead>
<tr>
<th>Year</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>52.1%</td>
<td>47.9%</td>
</tr>
<tr>
<td>2018</td>
<td>54.4%</td>
<td>45.6%</td>
</tr>
</tbody>
</table>

### EU-28 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>22.4%</td>
<td>58.4%</td>
<td>19.2%</td>
</tr>
<tr>
<td>2018</td>
<td>23.3%</td>
<td>53.7%</td>
<td>23%</td>
</tr>
</tbody>
</table>
**EU-28 sport labour market - Type of employment**

<table>
<thead>
<tr>
<th></th>
<th>Employed</th>
<th>Self-employed</th>
<th>Employed</th>
<th>Self-employed</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>81.8%</td>
<td>18.2%</td>
<td>79.2%</td>
<td>20.8%</td>
</tr>
<tr>
<td>2018</td>
<td>79.2%</td>
<td>20.8%</td>
<td>79.2%</td>
<td>20.8%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Part Time</th>
<th>Full Time</th>
<th>Part Time</th>
<th>Full Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>43.1%</td>
<td>56.9%</td>
<td>43.1%</td>
<td>56.9%</td>
</tr>
<tr>
<td>2018</td>
<td>44.4%</td>
<td>55.6%</td>
<td>44.4%</td>
<td>55.6%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Low</th>
<th>Medium</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>18.8%</td>
<td>53.2%</td>
<td>28%</td>
</tr>
<tr>
<td>2018</td>
<td>15.7%</td>
<td>47%</td>
<td>37.3%</td>
</tr>
</tbody>
</table>

* 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 5-8

- **ISCED 1997** (data up to 2013)
  - Levels 0-2
  - Levels 3-4
  - Levels 5-6

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**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)**

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
<th>+19.2%</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>798,777</td>
<td></td>
<td>952,178</td>
</tr>
</tbody>
</table>

- Engaged in a sport organisation (NACE 93.1) 47.7%
- Engaged in an organisation whose main business is not the provision of sport (other NACE codes) 52.3%

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

<table>
<thead>
<tr>
<th></th>
<th>8.4%</th>
<th>40.7%</th>
<th>7.1%</th>
</tr>
</thead>
<tbody>
<tr>
<td>NACE 93.2: Amusement and recreation activities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NACE 85.5: Other education including sports and recreation education</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NACE 84.1: Administration of the state</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Growth from 2011 to 2018**
  - Athletes and Sports Players ISCO 3421 +51.1%
  - Sports Coaches, Instructors and Officials ISCO 3422 +85.2%
  - Fitness and Recreation Instructors & Programme Leaders - ISCO 3423 +13.6%

- **Proportion of sport occupation in 2018**
  - Athletes and Sports Players ISCO 3421 6.9%
  - Sports Coaches, Instructors and Officials ISCO 3422 58.2%
  - Fitness and Recreation Instructors and Programme Leaders - ISCO 3423 34.9%
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

<table>
<thead>
<tr>
<th>Top 5 type of respondents</th>
<th>n=3797</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sport Club</td>
<td>43.9%</td>
</tr>
<tr>
<td>Sport Federation</td>
<td>19.7%</td>
</tr>
<tr>
<td>Municipality/Local Authority</td>
<td>5.8%</td>
</tr>
<tr>
<td>Fitness Club/ Centre</td>
<td>4.6%</td>
</tr>
<tr>
<td>Outdoor Activity provider</td>
<td>3.9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Status of respondents</th>
<th>n=3728</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not-for-Profit</td>
<td>61.8%</td>
</tr>
<tr>
<td>Public</td>
<td>17.8%</td>
</tr>
<tr>
<td><em>Other</em>= 7.4%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Size of organisations</th>
<th>n=3634</th>
</tr>
</thead>
<tbody>
<tr>
<td>No staff</td>
<td>20.6%</td>
</tr>
<tr>
<td>1 to 4 employees</td>
<td>29.1%</td>
</tr>
<tr>
<td>5 to 49 employees</td>
<td>35.2%</td>
</tr>
<tr>
<td>50+ employees</td>
<td>13.8%</td>
</tr>
</tbody>
</table>

### 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**

| 6 | Operational staff | 46.1% |
| 7 | Athletes and Players | 34.1% |
| 8 | Outdoor activity leaders and animators | 31.1% |
| 9 | Fitness Instructors / Personal Trainers | 29.3% |

| 1 | Sport coaches | 79.6% |
| 2 | Clerical and Office staff | 70.5% |
| 3 | Senior Management staff | 57.7% |
| 4 | Middle Management staff | 52.1% |
| 5 | Sport officials | 48.9% |
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

Difficulties to fill vacancies - n=3037

44.7% NO

27% YES

42.3% NO

30.7% DO NOT KNOW

Top 3 difficulties when recruiting - n=2127

45.6% Low numbers of applicants with required motivation and attitude

44.1% Unattractive terms and conditions offered for this post

38.7% Low numbers of applicants with the required skills

Top 3 hardest roles to fill - n=786

73% Sport Coaches

27.4% Clerical and office staff

23.9% Operational staff

- 5 most important skills and attributes
- 5 weakest skills and attributes
### 3.4 Retention Realities and Challenges

- **Difficulties retaining staff** - n=3019
  - 22.1% Yes
  - 52.2% No
  - 25.7% Do not know

- **Hardest roles to retain (top 3)** - n=634
  - 65.9% Sport Coaches
  - 27.1% Clerical and office staff
  - 25.4% Operational staff

- **Top 5 difficulties expressed for retaining staff** - n=642
  - 43.8% Better pay by other organisations
  - 29.9% Lack of career progression/pathways
  - 27.6% Better pay offered in other job roles
  - 27.4% Lack of financial stability for the organisation
  - 24.6% Lack of commitment to the job

### 3.5 Workforce Development and Training

- **Organisational review of skills and training needs of staff** - n=2901
  - 35.4% Yes, partly
  - 41.8% Yes
  - 17.9% No

- **Top 3 barriers expressed for arranging training** - n=2758
  - 48.5% Lack of funds available for training
  - 46.2% Training is too expensive
  - 39.8% Courses of interest are not available locally

### 3.6 Engagement of Volunteers

- **Engagement of volunteers in a typical year** - n=3612
  - 82.5% Organisations engaging volunteers
  - 14.7% Organisations not engaging volunteers

#### Expectations of volunteers and paid staff

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

<table>
<thead>
<tr>
<th>Role</th>
<th>Yes</th>
<th>No</th>
<th>Do not know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sport officials</td>
<td>69%</td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>Outdoor activity leaders and animators</td>
<td>59.6%</td>
<td>40.4%</td>
<td></td>
</tr>
<tr>
<td>Sports Coaches</td>
<td>56%</td>
<td>44%</td>
<td></td>
</tr>
<tr>
<td>Clerical and office staff / receptionists</td>
<td>52%</td>
<td>48%</td>
<td></td>
</tr>
<tr>
<td>Operational staff</td>
<td>52%</td>
<td>48%</td>
<td></td>
</tr>
<tr>
<td>Senior and middle management staff</td>
<td>51%</td>
<td>49%</td>
<td></td>
</tr>
</tbody>
</table>

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

- **Any particular problem engaging volunteers** - n=3018
  - Yes 45.8%
  - No 16.4%
  - Do not know 37.8%

- **Top 3 occupations where there are problems engaging volunteers**
  - Management: board members 61.1%
  - Sport Coaches 52.9%
  - Sport Officials 49.7%
### Key Issues and Challenges for the Sport and Physical Activity Sector

- **Expectations and priorities from national governments on sport organisations are increasing**
  - Agree: 60.8%
  - Disagree: 21.5%

- **Sport organisations have become more professional in recent years**
  - Agree: 77.6%
  - Disagree: 12.8%

- **The sector is changing and evolving, as a result the skills needed by those working in the sector will change too**
  - Agree: 79%
  - Disagree: 9.4%

- **In the future there will be a demand for a better qualified workforce operating in sport organisations**
  - Agree: 66.8%
  - Disagree: 16.7%

- **It is difficult to find and recruit people with the right skills to work as paid staff**
  - Agree: 50.8%
  - Disagree: 31.1%

- **It is difficult to find and recruit people with the right skills to work as volunteers**
  - Agree: 60.8%
  - Disagree: 25.7%

- **It is important that staff have access to ongoing training to keep their skills up to date**
  - Agree: 91.5%
  - Disagree: 3.2%

- **New training courses are required to meet the training needs of sport organisations**
  - Agree: 71.9%
  - Disagree: 16.7%

- **Universities/training providers should work more closely with sport organisations**
  - Agree: 79.9%
  - Disagree: 6.9%

- **It is difficult to progress from a technical role (e.g. as a coach or instructor) to a management position**
  - Agree: 51.1%
  - Disagree: 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)**
  - Agree: 71.5%
  - Disagree: 15.4%

- **Staff would benefit from learning experiences in other countries**
  - Agree: 57%
  - Disagree: 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 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.

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

CONTACT DETAILS:
EOSE – 1, Grande rue des Feuillants – 69001 Lyon – France
eosesec@eose.org // 0033 (0) 437 431 939

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