



Employment and Skills in Sport and Physical Activity

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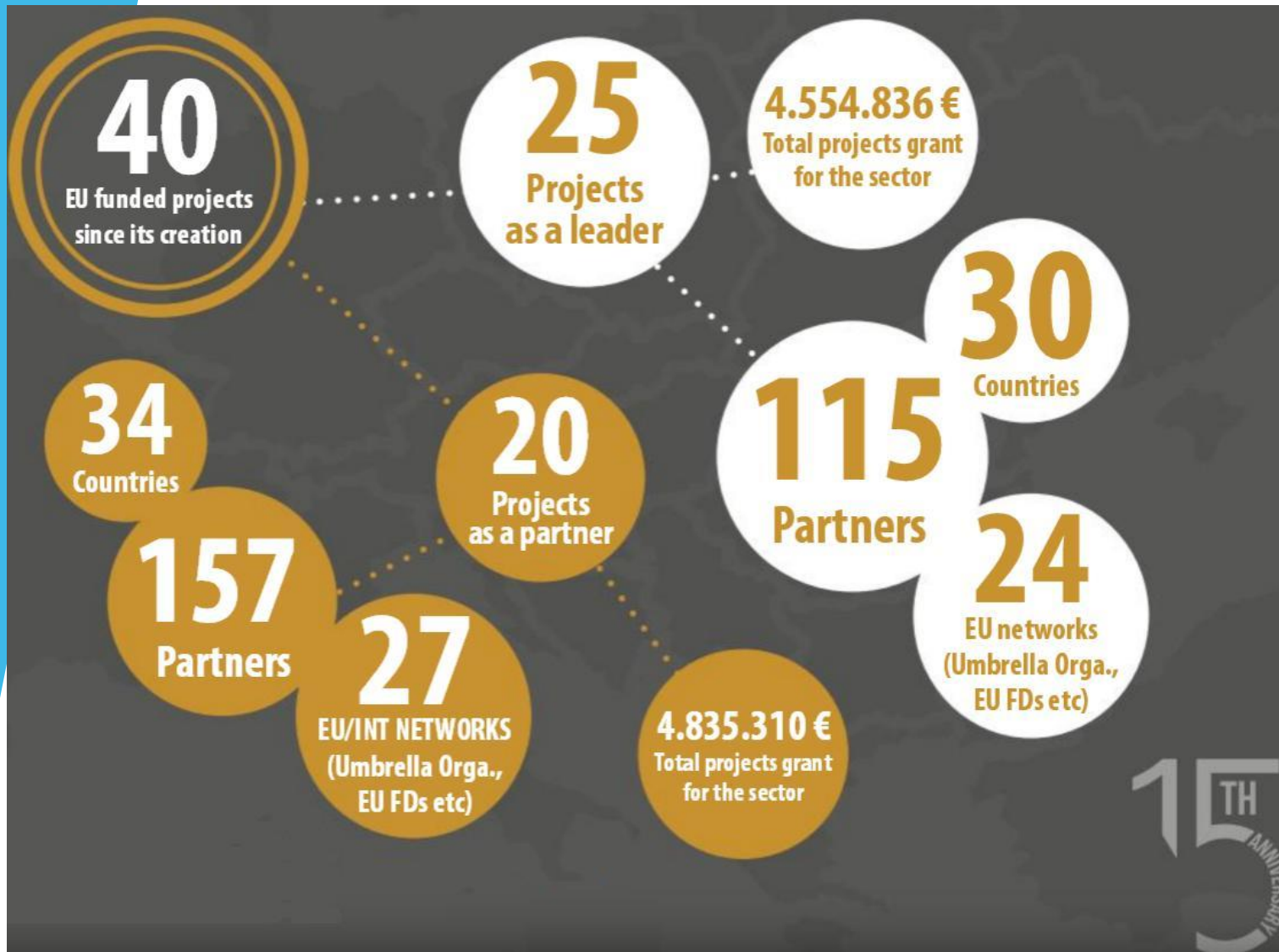
INTRODUCING EOSE

- ▶ **Independent not for profit organisation** (France, 2002)
- ▶ **EU membership and network** (20 Countries)
- ▶ **Knowledge and expertise** in the sport and physical activity sector, labour market and VET policy
- ▶ Small central team - support and management
- ▶ **Specialisation:**
 - ▶ Sport and Physical Activity sector
 - ▶ Sport Education Systems
 - ▶ Workforce development
 - ▶ Linking education to the labour market
 - ▶ European policies and initiatives
- ▶ Recognised as **expert/adviser** by EC

EOSE VISION FOR THE SECTOR

- ▶ Sport fulfilling its potential as a social and economic driver
- ▶ Better sport and healthy lifestyles for all
- ▶ **Improved service to meet the specific needs of every client**
- ▶ Delivered through better skilled people
- ▶ Fit for purpose qualifications and training (cooperation)
- ▶ Reflecting employment needs based on updated and consistent labour market information
- ▶ Clear employment and career structure and pathways
- ▶ Sport fully integrated into NQF and EQF – qualifications delivered nationally based on common standards
- ▶ Transparency, transferability, mobility
- ▶ Volunteering and informal learning valued and recognised

INVOLVEMENT WITH EU PROJECTS





Introducing: The EUROPEAN SECTOR SKILLS ALLIANCE (ESSA-Sport)

THE OPPORTUNITY

- ▶ Erasmus+ Key Action 2 – Sector Skills Alliances
- ▶ 500,000 Euros maximum over 2/3 years

SSAs aim at:

- ▶ **Tackling** skills gaps by identifying sector specific labour market needs and new skills in one or more occupation
- ▶ **Strengthening** exchange of knowledge between education and labour market
- ▶ **Modernising** VET, integrating work-based learning, exploiting potential to drive economic growth and innovation
- ▶ **Building** trust, cross-border certification, professional mobility, qualification recognition

SPECIFIC AIMS

1

**UNDERTAKE DESK
RESEARCH (N/EU)**
*(labour markets, sport
systems,
education/qual.
systems)*

3

**ENSURE WIDE
CONSULTATION
AT NATIONAL
AND EU LEVEL**
*(Bottom-up
approach)*

5

**IDENTIFY
PRIORITIES FOR
ACTION AT
NATIONAL AND
EU LEVEL**

2

**CONDUCT EU
ONLINE EMPLOYERS
SURVEY ON SKILLS
NEEDS**

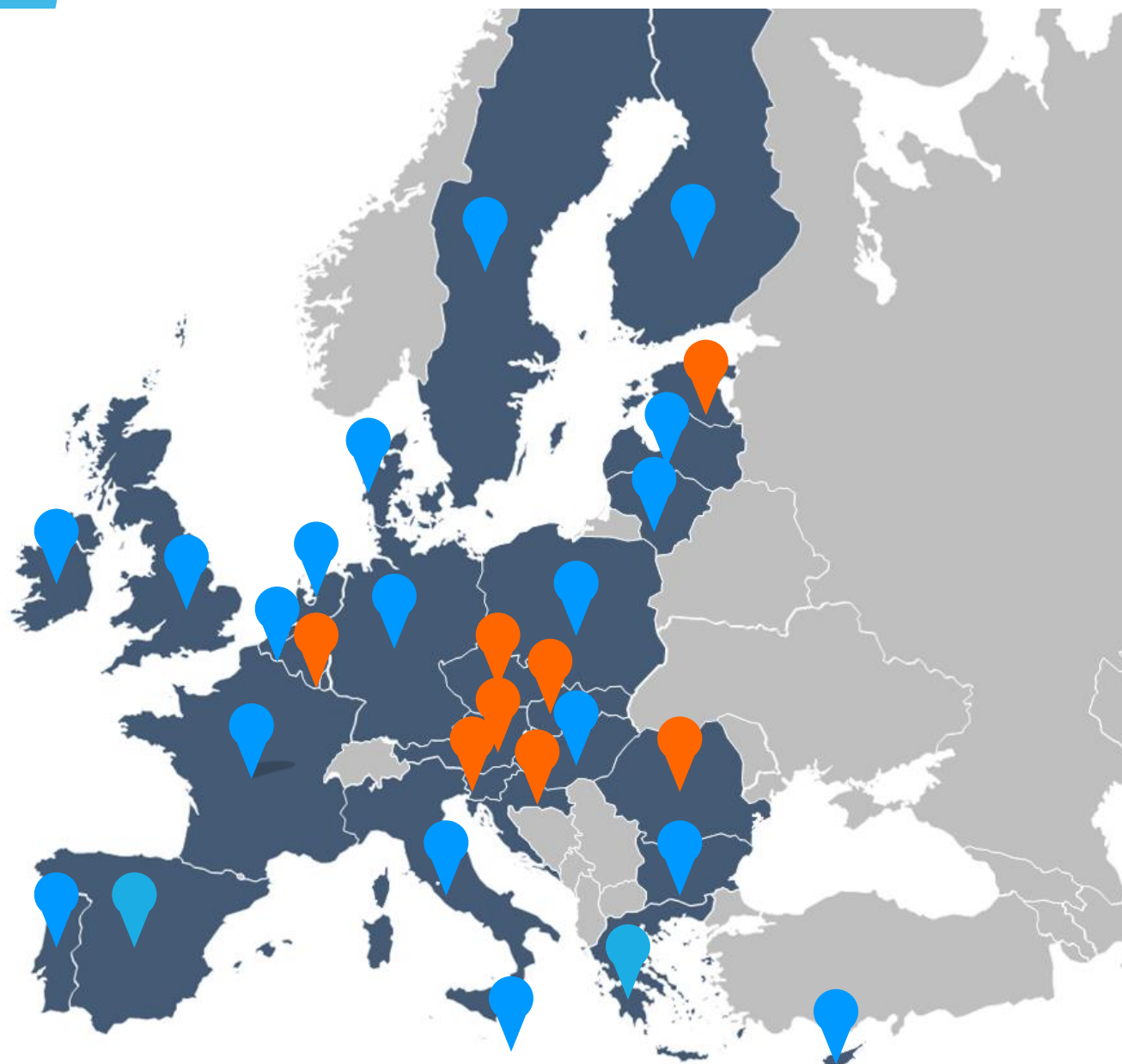
4

**DEFINE AND
UNDERSTAND THE
SECTOR**
*(Realities, skills needs,
tendencies etc)*

6

**ESTABLISH
SUSTAINABLE
NETWORK OF
STAKEHOLDERS
AND WORK PLAN**

SCOPE – EUROPEAN UNION



**OFFICIAL PARTNERS
OF ESSA-SPORT
= 20 COUNTRIES**

**COUNTRIES
WITHOUT OFFICIAL
PARTNER =
8 COUNTRIES**

Outputs

From this process to produce:

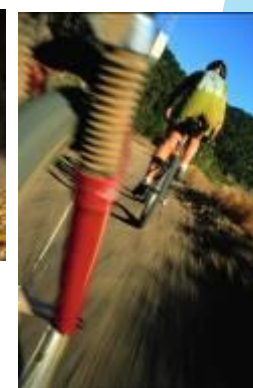
- 🔬 **National Reports** (20 + 8) – research, consultation, validation
- 🔬 the **first Employment Map** of the sport sector across the EU based on the National Reports (bottom up approach)
- 🔬 the **first Skills Profile (Map)** of the sector's current and future skills needs across the EU
- 🔬 a **sustainable network** of sector stakeholders (**Sector Skills Partnerships**) at national and EU level to lead action to address the skills priorities identified in the reports
- 🔬 and to **establish a EU Strategic Action Plan with concrete recommendations and priorities**
- 🔬 To inform the EU tools – the **EU Skills Panorama** and **ESCO**

Why is the ESSA Important?

- ▶ We all believe in the power of sport and physical activity to change lives
- ▶ It has huge potential to create jobs, to generate economic activity, to improve health, to engage communities and support social cohesion
- ▶ Yet it is hugely fragmented – by nation, by sport, by sub-sector, public sector from private sector etc
- ▶ We are failing to engage the whole community – too few are active, the disadvantaged and those with disabilities are under-represented
- ▶ Success depends on a skilled workforce – managers, instructors, coaches etc – working together to deliver opportunities for activity for all
- ▶ We are a people focussed industry
- ▶ Can ESSA provide a focus for collaboration and change?

SCOPE – Sport & Physical Activity

"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."



SCOPE - NACE CODES

- ▶ **93** Sports activities and amusement and recreation activities
- ▶ **93.1** Sports activities
- ▶ **93.11** Operation of sports facilities
- ▶ **93.12** Activities of sport clubs
- ▶ **93.13** Fitness facilities
- ▶ **93.19** Other sports activities
- ▶ **85.51** Sports and recreation education*

**This class includes the provision of instruction in athletic activities to groups of individuals, such as by camps and schools. Overnight and day sports instruction camps are also included. It does not include academic schools, colleges and universities. Instruction may be provided in diverse settings, such as the unit's or client's training facilities, educational institutions or by other means. Instruction provided in this class is formally organised. This class includes:- sports instruction camps, sports instruction, gymnastics instruction, riding instruction, academies or schools, swimming instruction, professional sports instructors, teachers, coaches, martial arts instruction, card game instruction (such as bridge), yoga instruction.*

Warning

- ▶ Statistics in this presentation have been produced in dialogue with Eurostat (bespoke analysis)
- ▶ Being tested with national co-ordinators and discussed with NSOs and other sector data
- ▶ Labour Force survey – consistent methodology BUT
 - ▶ sample size
 - ▶ NSO data - different sources, employer data v labour force interview
 - ▶ different levels of detail, and samples

Employment in sport organisations

- ▶ **Sport Organisations – NACE code 93.1**
- ▶ **Total Employees – 1,295,293**

Including:

- ▶ **476,020 Sport Occupations (37%)**

ISCO code 342 including:

- ▶ Athletes and players
- ▶ Coaches, Instructors and Officials
- ▶ Fitness and Recreation Instructors
- ▶ **819,273 Sport related Occupations**
 - ▶ (114,967 Managers)

Sport Organisations Characteristics:

- ▶ 57% full time
- ▶ 84% employed
- ▶ 15% self employed
- ▶ Age – 15-24: 25%
- ▶ Age – 25-49: 53%
- ▶ Age – 50+: 22%
- ▶ 43% female
- ▶ Education - Graduates+ 32%
- ▶ Education - Medium: 50%
- ▶ Low Education – 18%

Sport Organisations

Largest employing countries:

- ▶ UK (26%)
- ▶ Germany (13%)
- ▶ Spain (10%)
- ▶ France (9%)
- ▶ Italy (9%)
- ▶ 49% in top 3 countries

Sport Occupations - Sport delivered Other Sectors

- ▶ Sport specific occupations (ISCO code 342)
 - ▶ Athletes and players
 - ▶ Coaches, Instructors, Officials
 - ▶ Fitness and Recreation Instructors
- ▶ In Sport Organisations – **476,020 (52%)**
- ▶ In other Sectors – **432,117 (48%)**
- ▶ **Total Employment in Sport**
 - ▶ Sport Organisations – **1,295,293 (all employees)**
 - ▶ + Sport Occupations outside sport – **432,117**
- ▶ **TOTAL – 1,727,410 employees**
delivering sport

Other Sectors using Sport

Total Sport Occupations – **908,137**

Sport Occupations outside sport - **432,117**

Sport Education (85.5) - **175,670**

Other Education – 50,710

Public/community sector - 45,675

Health/Social care – 29,840

Accommodation/Hotels - 15,718

Agriculture/water – 13,062

Membership Orgs – 10,040

► But is this still an underestimate?

Sport Occupations

- ▶ Full time 52%
- ▶ 57% male
- ▶ Self employed 32% (15% in sport orgs)
- ▶ 58% age 25-49
- ▶ Education: Medium – 46%
- ▶ Education: High - 42% (32%)

Athletes: 53,474*

Coaches: 351,038*

Fitness & Recreation Instructors: 249,007*

* *Based on 20 countries*

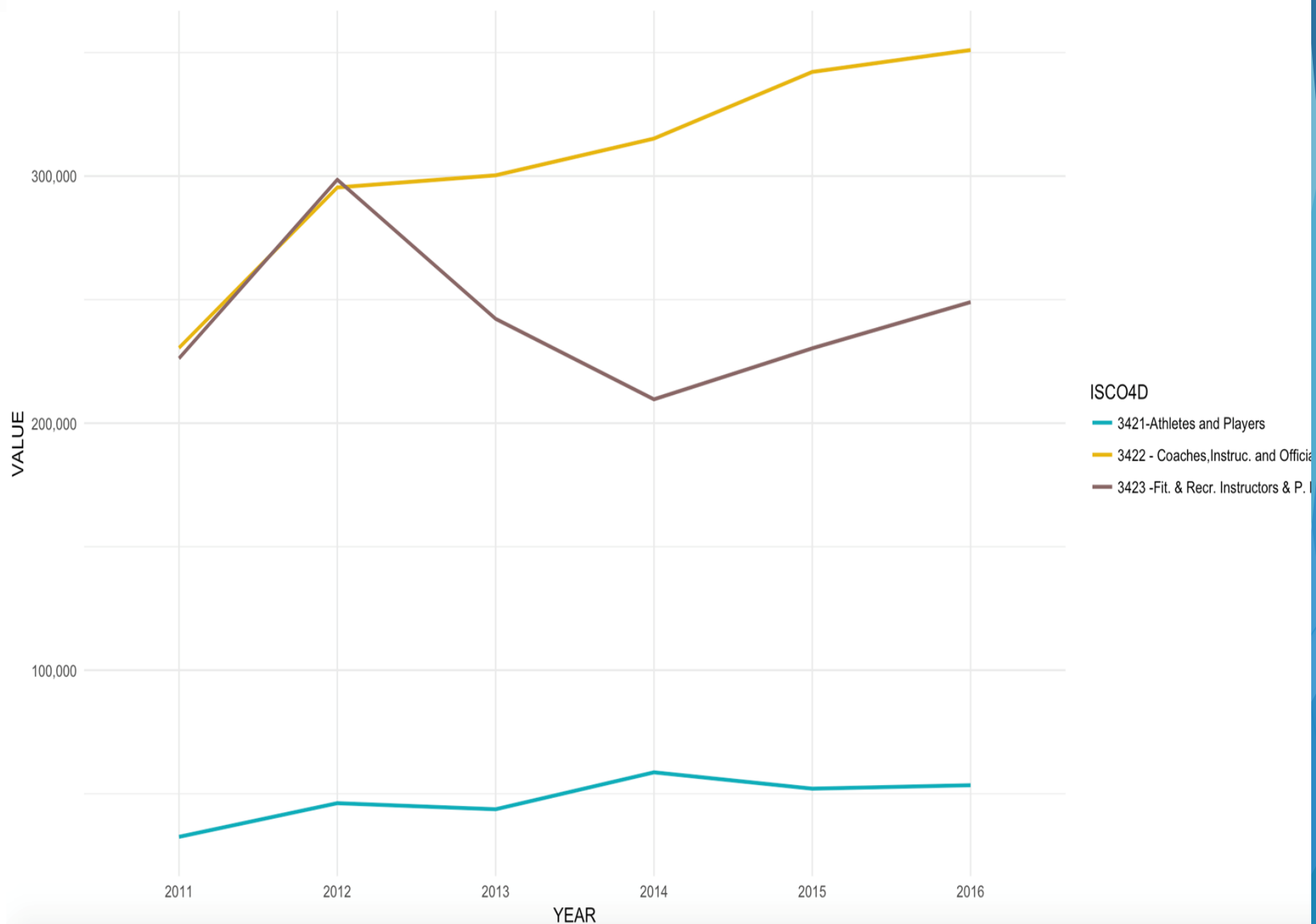
Employment in Baltic States

	<u>NACE 93.1</u>	<u>Sport Occs 342</u>	<u>TOTAL</u>
▶ Lithuania	6.067	3.659	7.229
▶ Latvia	1.963	2.885	4.572
▶ Estonia	4.538	2.763	4.735

Sport Occupation Characteristics - Lithuania

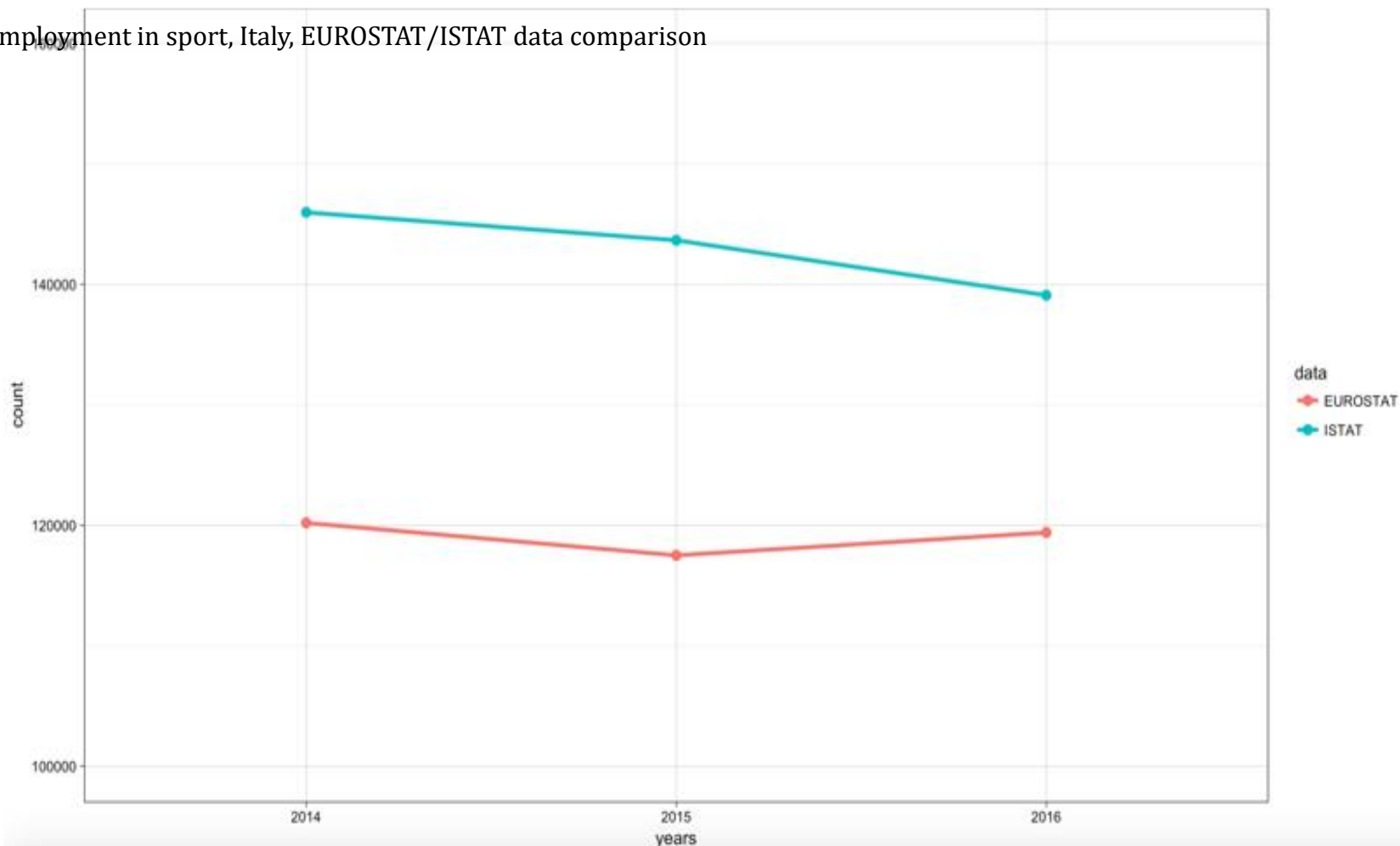
- ▶ 81% employed status (EU 67% - 32% *self-employed*)
- ▶ 59% male (EU 57%)
- ▶ 88% full time (EU 52%) 75% in sport organisations
- ▶ 78% high level education (EU 41%)
- ▶ 26% (age over 50) (EU 18%)
- ▶ 10% under 25 (EU 24%)

ISCO 342 - TIME SERIES 2011-2016 EU 28



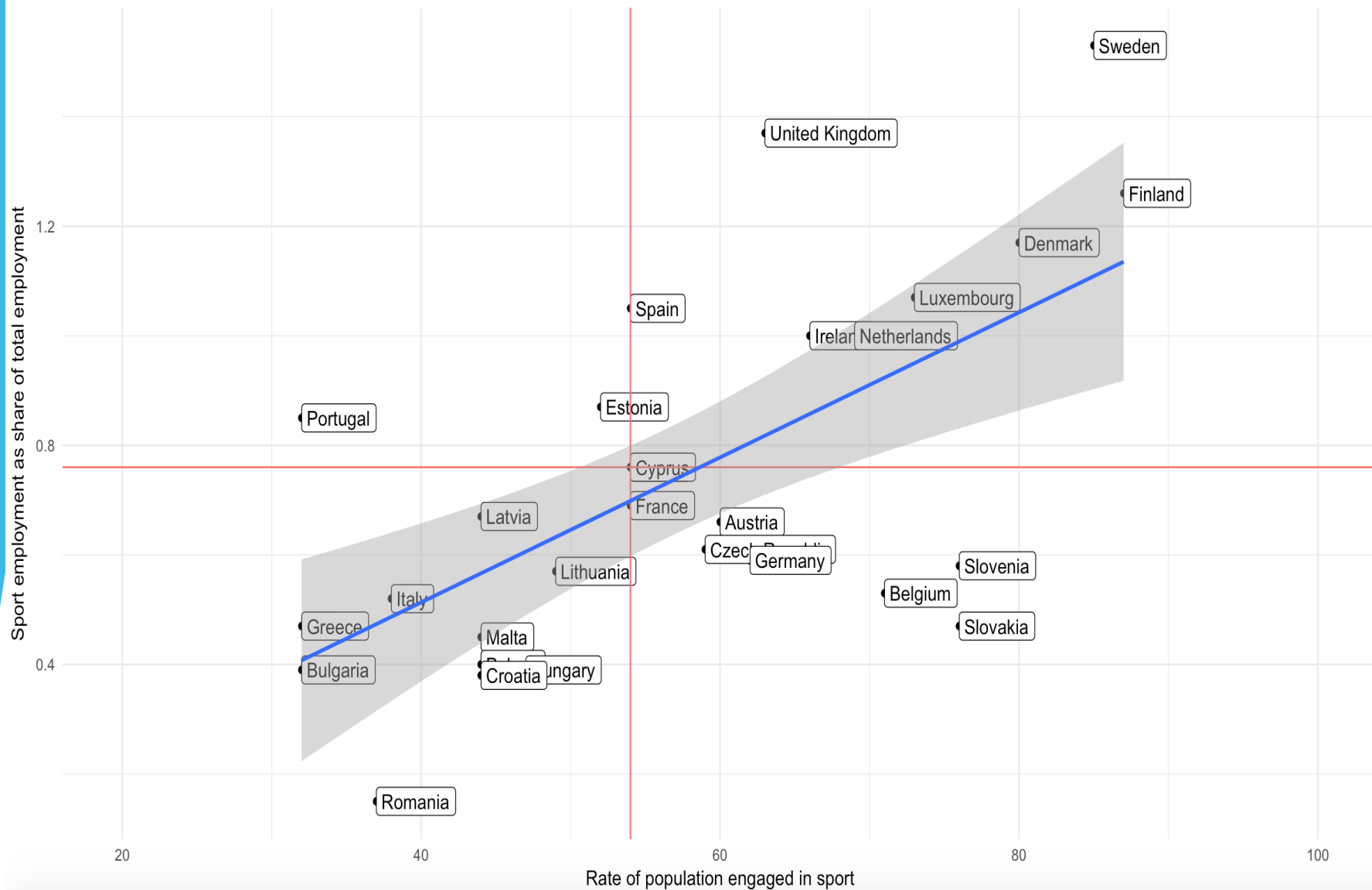
Italy Case Study – missing jobs?

Employment in sport, Italy, EUROSTAT/ISTAT data comparison



Rate of population engaged in sport vs Sport employment as share of total employment

EOSE Research Group Elaboration, 2016



Issues from Consultation

- ▶ Feedback from Round Table Events in 10 countries
- ▶ FOR DISCUSSION

Feedback - National Round Tables

- ▶ A **growing** sector in a Europe that is changing and being challenged - e.g migrants/refugees/youth unemployment
- ▶ **Changing roles/expectations from Governments** of Municipalities and Federations
- ▶ Austerity and public spending cuts – Municipalities and grants to sport
- ▶ Yet - pressure to increase levels of physical activity, improve health, attract the hard to reach people, encourage social integration
- ▶ A **people facing sector** where a **skilled and qualified** workforce, is paramount to its success.
- ▶ A sector driven by **volunteers** in Europe: 35 million Volunteers in Sport (= 7% population EU)
- ▶ Challenges in delivery, challenges from Government, challenges in skills

CHALLENGES for FEDERATIONS

- ▶ To achieve international success
- ▶ To maintain integrity of their sport (doping, match fixing)
- ▶ To sustain and grow their clubs
- ▶ To improve and update governance at all levels
- ▶ To improve gender equality (leaders, coaching, participants)
- ▶ To become inclusive (including those with disabilities)
- ▶ To bring qualifications inside formal system (NQF/EQF)
- ▶ To link international federation requirements with national systems

CHALLENGES – PRIVATE SECTOR

- ▶ To integrate the growing private sector and new entrepreneurs into the established “system”
- ▶ Regulate or not? – a challenge to established structures in the Sector
- ▶ Concern of regulators - quality/health and safety?
- ▶ Validity of training and qualifications
- ▶ Lack of structure and organisation
- ▶ Big potential in fitness, in activity tourism
- ▶ Emergence of small businesses and growth of international chains

REALITIES AND CHALLENGES

- ▶ Potential often **underestimated or not recognised** but **expectations are growing**
- ▶ Employers **seeking well trained employees** but existing courses **not regarded as sufficiently relevant** – **there is a recognised gap** between competences required and learning outcomes acquired
- ▶ Sport training often **outside national qualification structure**
- ▶ **VET very limited** in the sector in many countries
- ▶ How clear is the Sector **career structure and pathways?**
- ▶ **Which course? Which job?** – key questions for young people: do we have the answer?
- ▶ Increased desire of **mobility** – **how transferable are skills and qualifications?**

Next Steps - please get involved

- ▶ CONSULTATION phase
- ▶ National Stakeholder Groups
- ▶ On-line EU questionnaire (all languages)
- ▶ Focus – recruitment and skill needs of your organisation
- ▶ www.essa-sport.eu
- ▶ Spring 2019 – National stakeholder consultation
 - ▶ Sport System
 - ▶ Education and training supply
 - ▶ Labour Market
 - ▶ Skills priorities – from survey results
- ▶ GO ON LINE TODAY!

IMPACT and NEW EXPECTATIONS

