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CIMSPA 2020 workforce insight report:

Understanding the size and
impact of the UK Sport and
Physical Activity Workforce

October 2020



About CIMSPA



The Chartered Institute for the Management of Sport and Physical Activity.

CIMSPA is the professional development body for the UK's sport and physical activity sector, committed to supporting, developing and enabling professionals and organisations to succeed and, as a result, inspire our nation to become more active.

CIMSPA vision

Shaping a recognised and respected sport and physical activity sector that everyone wants to be part of.



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About Emsi



At Emsi, we believe that the key to creating a better national economy is to better understand economies at the local and regional level.

No two local economies are the same, and so each one will have a unique industrial mix, differing skills requirements, and specific solutions for fostering growth. We are working with organisations across the country in the education, economic development and employment sectors, helping them better understand their own economy, so that they are better placed to apply solutions that are right for their area.

To achieve this, we employ a team of expert economists, data scientists and software programmers to build a dataset that is not only highly granular and extremely robust, but also accessible and easy to use.

Emsi was founded in Idaho in 2000 and now serves clients in the US, Canada, Australia and the UK.

This report was produced by Emsi for CIMSPA by Duncan Brown, who would like to thank Matt Mee, Phill Wright and Conor Hicken for their input.



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Foreword from CIMSPA



Tara Dillon
CEO, CIMSPA



We look forward to working with our partners and the entire sector to step forwards into the future stronger together.

We are thrilled to have worked with Emsi on this report to uncover the professional workforce of our sector unlike ever before. This depth of understanding across all areas of sport and physical activity, encompassing both employed and self-employed roles, plus the incredibly important voluntary contingent, highlights how interconnected we are as a sector.

Given the current climate, with the imminent UK exit from the European Union and the impact of the Covid-19 pandemic, there is understandably a lot of uncertainty in our sector. However, this report demonstrates our sector's resilience in the face of adversity on numerous occasions, including the continued growth shown through and beyond the banking crisis of 2008. This vital insight will help the sector not just recover but continue to grow, Stronger Together; a campaign that CIMSPA has run throughout the period of lockdown with a very positive response.

This report brings to light many of the strengths and opportunities of our incredible sector and it is fascinating to see the continued growth in the role that self-employed practitioners play in the sport and physical activity sector. Freelancers now make up 22% of our overall workforce and an estimated 55% of all fitness instructing, personal training and coaching roles; an essential component of the sector's frontline. Over the last 10 years, freelance roles have increased by 67% which reflects the growth in personal training / coaching but also highlights the growing vulnerability

of the workforce with employed roles and subsequently job security declining in the same period.

Given the uncertainties and shifts in our sector, it is vital that professional standards step to the forefront of sport and physical activity and the entire workforce gets behind them. Professional standards have been designed by the sector to define the knowledge, skills and behaviours for all occupations and continue to be developed as sport and physical activity evolves. The UK fully understands the importance of being physically active, a consistent message throughout the lockdown phase of Covid-19. As the economy begins to recover it is vital that we use the professional standards to unite, continue to improve and gain the recognition that we all deserve.

This report can support the recovery and continued growth of our sector by highlighting our strengths and exposing the areas that we can become better and more efficient in, such as accurately understanding skill demand, retaining our workforce and recruitment.



Foreword from Sport England



Tim Hollingsworth
CEO, Sport England

The importance of the amazing people who work within our industry cannot be overstated... without the coaches, instructors, receptionists, facility operators and the people who supervise, manage and lead them we will not be able to bring about a population shift in our nation's levels of physical activity... they are our 'key workers' and Sport England's valued partnership with CIMSPA is striving to make their lives better.

In September 2018 Sport England released 'Working in an Active Nation', our strategy aimed at supporting the development of a more professionally recognised and customer focused workforce. In this document we outlined the need for a greater understanding of the scale and scope of the paid workforce in England

It is interesting to note that the report makes reference to the importance of freelance, self-employed workers and the role they have played in maintaining the growth of the sector in the face of difficult economic times. Our work to tackle inactivity has shown how important it is for activity to be provided by people who are like them and can do so in their community. This 'hyper local' provision delivered in homes, residential care settings, church halls and community centres is the lifeblood of so many people's access to activity and we aim to protect this at all costs.

I would like to commend CIMSPA for the work they have done to develop this fantastic source of insight for the sport and physical activity sector. This document represents an important milestone in our shared purpose to support training providers, educational establishments, employers and deployers to help create an environment where the people in our workforce are able not just to survive, to thrive.



As I write this we are still in the midst of responding to the unprecedented challenge presented by COVID-19, and this focus on our people has never felt more relevant.

and made a commitment to working with CIMSPA to deepen our shared understanding of the sport and physical activity labour market.

Executive Summary

Defined across industries and occupations, in 2019 the sport and physical activity labour market covered 585,000 roles. Looking at it from an industry perspective, from 2003 to 2017 the sector saw growth of 42 per cent, adding 129,000 net new jobs. After the recession caused growth to pause, the successful experience of the 2012 London Olympics signalled a period of 4 per cent average annual growth and 78,000 net new jobs over the following five years.

The next few years have a high degree of uncertainty given the potential disruption to the wider economy following the UK's exit from the European Union and the Covid-19 pandemic and the lockdown measures implemented to contain it. Early indicators suggest a 31 per cent reduction in job postings for sport and physical activity occupations comparing May to early-March; new job postings have fallen by 65 per cent; there have been very few new roles advertised for sports and leisure assistants.

42%
sector growth 2003 – 2017

The professional labour market of the sport and physical activity sector has grown robustly over the past few decades. Before then much of the industry was driven primarily by non-professional, often voluntary efforts. The legacy of that continues to be a valuable part of the sector, and adds an additional layer to the labour market: some 3 million adults are involved in coaching in the UK, even if most are only working 1-2 hours a week. The professional labour market, encompassing sport players, sport coaches, fitness instructors, and managers and assistants in sport and leisure, is only around 15 per cent of that total – but its different role allows it to make a particularly important contribution.

That professional labour market is the focus of this report – it explores the links with the volunteer and non-professional parts of the sports and physical activity sector, but it investigates professional roles in depth. Not all sport and physical activity professionals work in industries devoted to their

work – some work in hospitality or other service industries. At the same time, as well as that large number of smaller contributors in the labour market, there are also those who perform sport and physical activity roles through freelancing – this report brings some of the available data on freelancers into the discussion.

Sport and physical activity professionals are not the most diverse workforce: it is younger and more male than average, with more than twice the share of 16 to 24 year olds than the wider economy, especially in sport and leisure assistant roles. Over 62 per cent of jobs are held by men, compared to 51 per cent of the wider economy. While sport players differ, other professional roles typically are held by fewer ethnic minority employees and fewer migrant employees than the national labour market averages – although the lower migrant levels suggest lower sensitivity to potential changes to immigration policy.

Growth in the past decade has been driven by fitness facilities, fitness instructor roles, and especially through the growth in the 'budget gym' business model. Freelancers have had the greatest growth in terms of employment type, but employer recruitment advertising has doubled from 2016 to the start of 2020 – having fallen off significantly since then as a result of the Covid-19 pandemic. Recruitment advertising is overwhelmingly concentrated among fitness instructor roles, which reflects a much greater churn in that occupational labour market.

On that point, fitness instructor job postings in 2019 were more than double the underlying number of jobs, and many were advertised for longer than 40 days – that can be indicative of the difficulties in finding the right talent. 2017 data from the biennial Employer Skills Survey reports tell us that employers report 12 per cent of leisure and sports manager vacancies, 13 per cent of leisure and sport assistant vacancies, and 20 per cent each of fitness and sports coaches vacancies were hard to fill on account of skills shortages. Estimates in this report are that the sector took on £897 million in lost productivity and logistics from recruitment, with more than half arising from the high turnover of fitness instructors.

Outside of the shorter term disruptions of Covid-19 and Brexit, the outlook for the sport and physical activity sector is positive.

The sport and physical activity sector has grown in all regions and countries of the UK during the last decade. While the greatest numbers of jobs are in London, relative to the size of the population or economy, less urban parts of the North East, East of England and the South West have some of the greatest concentrations of jobs. The sector is less concentrated in major cities, and is found in almost every part of the country. Its wide presence means that it is often best understood as a set of distinct regional labour markets, each with their own dynamics of demand and supply.

Outside of the shorter term disruptions of Covid-19 and Brexit, the outlook for the sport and physical activity sector is positive. The underlying demands driven by rising income and lifestyle

considerations and the increasing importance of public health – now magnified by Covid-19 – all suggest a positive outlook. A look at exposure to technology change or 'automation' suggests that most sport and physical activity roles are relatively little-exposed.

In fact, the growth of sport has been powered by the development of new technology – both in stimulating demand for professional support on sport activities, and providing tools which allow



for the professionalisation of sport and fitness instruction. That complementarity between sport and physical activity knowledge and technology is likely to carry forward for some time, with much of professionals' working time spent in tasks like thinking and moving creatively, and imparting expert knowledge to others, which are difficult to automate.

The progress of professionalisation is visible in the high output of sport and physical activity achievements from the university system – averaging 18,000 to 19,000 each year from 2013 to 2018, ahead of graduate numbers more generally. Again reflecting professionalisation, the fastest growth has been in more specialist disciplines and for more advanced, Masters-level degrees – growing by 57 per cent in such a short space of time. These volumes do not match recent demands for new jobs to be filled in sport and physical activity professional roles, although as of yet these roles are not typically held by graduates, and so other sources of supply will remain important.

In terms of skills in demand, instruction and fitness training are in high demand because of the grown and intense churn of the fitness instructor labour market. Outside of that, physiology and anatomy also feature, but so too are a range of skills, especially important for coaches – child protection and welfare – as well as commercial skills rising in importance with the changing

business side of the sector – sales and booking apply here. It is these commercial skills which are particularly important in driving higher pay for the fitness instructor labour market.

To develop the sector, CIMSPA and its partners will need to consider a number of themes emerging from the report including:

- **Managing the recovery from Covid-19**
- **Encouraging development of a profession which is highly dispersed geographically and in employment type**
- **Developing career pathways from lower skill entry roles to the high skill opportunities**
- **Encouraging a more efficient employment model to allow for the reduction of recruitment costs**
- **Creating opportunities to develop skills which reflect the different demands in the market**



 **CIMSPA**

Introduction

Introduction



CIMSPA's role is to enable the professionalisation of the wider sport and physical activity workforce, to better equip professionals to deliver on the sector's broader ambitions for a healthier, flourishing society. To deliver on that role, CIMSPA and its members need to have available the best possible intelligence on the size and shape of the labour market, how and where it is changing, and its future prospects.

Understanding the labour market

Over recent decades, a combination of higher disposable income, an increased separation of work and physical activity, and cultural change have all led to growing demand for sport and physical activity in society. Consequently, there has been sustained growth of a dedicated, employed workforce, now representing a substantial industry sector in its own right. The presence of globally-recognised sporting competitions in the UK — most prominently, the English premier league, but it is far from alone — and the successful experience of the 2012 London Olympics have only served to accelerate this trend of sport and physical activity as a growing industry.

The role of the Chartered Institute for the Management of Sport and Physical Activity (CIMSPA) is to shape a recognised and respected sport and physical activity sector in the UK that everyone wants to be part of. CIMSPA works to:

- Allow individuals to realise their potential by having a clear route into and through the sector
- Provide employers with the best people
- Ensure the availability of quality and relevant learning and development opportunities
- Be the lead organisation on sport and physical activity workforce policy
- Give the public increased confidence in a professional, respectable sector.

To deliver on its mission, CIMSPA works with professionals themselves, as well as the organisations employing and supporting them. But to deliver fully on its role, especially amidst sustained change within the sector, CIMSPA needs intelligence on the labour market professionals and organisations are operating within – its size, its trends, its distribution, and its future prospects.

The workforce is a concern in the sport and physical activity sector across the UK. For example, in England, the sector's workforce strategy *Working in an active nation*¹ sets out a vision for a workforce able to support its broader agenda to promote engagement and achievement in sport and physical activity.

The strategy recognises a need for intelligence, setting as one of its five strategic approaches the need for

'Insight-led Delivery' and "a sector that is driven by a comprehensive evidence base that provides a deeper understanding of the impact of the workforce on the people we seek to engage." The strategy assigns an action for the sector to commission "research into the sport and physical activity labour market to provide a comprehensive picture of the scale and scope of the workforce"; it's this drive which provides the context for this report.

To deliver on its mission, CIMSPA works with professionals themselves, as well as the organisations employing and supporting them.

In 2017 CIMSPA produced its first labour market intelligence report² based on two surveys, one each of employees (n=698) and employers (n=28). That report offered valuable insights to better understand the sector, but the size and variety of the sector requires access to wider ranging data if it is to be properly understood. This report takes the labour market discussion forward by bringing to bear a raft of different official and proprietary data sources which allows for analysis of the sport and physical activity sector in several different dimensions – most importantly, looking at industries and occupations as distinct perspectives – and to explore it over time, and with attention to granular local variation.

The main intelligence sources used to produce this report are described in Appendices A and B, but they bring together a raft of large-scale sample surveys

conducted regularly by the Office for National Statistics (ONS); modelling to 'fill in the gaps' from those surveys and integrate different datasets; collection of millions of job advertisements; and a database of 11 million online profiles. While only subsets of these data are directly relevant to the sport and physical activity sector, they provide possibilities for depth of investigation not possible for the sector on its own.



- 1 Sport England (2018). *Working in an active nation: The professional workforce strategy for England*. London: Sport England.
- 2 CIMSPA (2017). *CIMSPA Labour Market Intelligence Report 2017*. Loughborough: The Chartered Institute for the Management of Sport and Physical Activity.

The report works with these different data sources to provide a coherent narrative of the state of the sport and physical activity sector labour market in 2020. Around the time this report was commissioned, the UK's exposure to the Covid-19 pandemic was only just becoming clear, but the consequent lockdown of social and economic activity has implications for sports professionals as much as any other workers: more than many in fact, given the nature of sport and physical activity. While the full implications of the lockdown for industries will not be known for many months after publication, this report starts with a review of the available data and a discussion of the indicators to watch out for.



This report

This report provides intelligence about sport and physical activity work, its trends, distribution and prospects. The ultimate impact of the Covid-19 lockdown and any further measures is likely to change those prospects, but until better data becomes clear, the past remains a good guide to the future. The demands the sport and physical activity workforce serves are not going away as a result of the pandemic, and if anything, may in the long run move further centre-stage. Understanding where the sport and physical activity industry had reached before the lockdown offers the best intelligence we have to think robustly about its future.

We start that investigation by seeking to identify the form and content of what we refer to here as

the sport and physical activity labour market, looking at it from the different perspectives of what sport and physical activity businesses do, where professionals work, different types of employment relationship, and the demographics of the professional workforce.

After that, we turn our attention to how the sport and physical activity labour market is changing over time, by exploring the changing pattern of jobs, self-employment and recruitment, and using data from online job postings to take a more detailed look at what job titles are being sought, what salaries are being advertised, and how long it takes to fill different roles. Following that exploration of national trends, we look at the local level, to see how the sport and physical activity industries distribute across the country – very

broadly is the answer – and how and why this is changing over time.

The final substantive chapter concentrates on the future for sport and physical activity work, starting with a look at the potential for technology to change the workplace, and then evaluating recent trends in higher education supply focused on the sector, before finishing with an identification of acute skills needs in different professional labour markets. The report then concludes with a discussion of the implications of the work for professional development within the sport and physical activity workforce, and for further research. In the appendices, we provide further detail on the data and methods supporting the analysis, and a summary table on sport and physical activity occupations.



 **CIMSPA**

Covid-19

Covid-19

The arrival of the Coronavirus (Covid-19) pandemic in the United Kingdom in early 2020 and the adoption of unprecedented 'lockdown' measures to contain its spread has had significant implications across the economy. For however long the lockdown conditions last, and for a recovery period thereafter, the consequences for sport and physical activity labour market demand will be profound – in this chapter we explore the initial data.

In March 2020, as this report moved into its initial production, the government announced a 'lockdown' on social and economic activity which in effect shuttered all industries involving non-essential interpersonal contact – especially those around hospitality – and also ended all activities involving people assembling. Despite similarly unprecedented mitigation measures – such as the Coronavirus Job Retention Scheme (CJRS) allowing workers to be put on paid 'furlough' – the consequences for economic activity are stark, with a sudden stop to large parts of the economy. The publication of the April Claimant Count unemployment figures¹ showed an increase of 862,000 people on a month earlier, a pace of change (70 per cent increase) not seen in previous economic contractions.

Detailed economic data takes time to produce and be analysed; the fullest picture on how patterns of industry and occupational

employment are changing amidst the Covid-19 lockdown will not appear for potentially 18 months. In the meantime, we have to use those indicators which are available to help us better understand how the labour market is responding to the consequences of lockdown. Only two are available at the time of writing – Job Posting Analytics, discussed in more detail for their longer term trends later in this report, but based on the collection and deduplicate of recruitment advertising as an indicator of employer demand; and Claimant Count unemployment data.

At the time of writing, only one relevant month's Claimant Count unemployment data has been published, covering the first several weeks of lockdown. The more detailed data available from

Jobseekers Allowance claims – typically reflecting those who have been in stable employment and find themselves unemployed – allow analysis by occupation. Using the set of occupations further

explored in the next chapter as expressing those roles with a focus on sport and physical activity, there is no noticeable swing in unemployment appearing in the

Claimant Count data across this first month, although it will be interesting to see how this picture develops over time.

The consequences for sport and physical activity labour market demand will be profound.

¹ Claimant Count unemployment figures are produced more quickly, but are limited in being based on movements into benefit claims, rather than being an accurate reflection of the number of people actively seeking work.

Job Posting Analytics are collected every day and, although a noisy measure, their near real-time nature allows an insight into how employers are responding to the effects of the pandemic and the lockdown. Over the following pages, using the same set of sport and physical activity occupations, we explore how recruitment advertising has changed since the start of March, across the group of occupations and compared to the wider economy, but also for individual sport and physical activity occupations.

Lockdown implications

As well as that data on the implications in terms of labour market activity, CIMSPA's own research work allows further insights into how Covid-19 and the lockdown are affecting the sport and physical activity workforce.

As we discuss later in this report, self-employed workers are an especially important part of the sector workforce, and have driven much of its recent growth. CIMSPA's survey work² finds that 60 per cent of them have no financial business reserves and they are facing substantial losses because of closed facilities and clients cancelling, as well as in some cases

choosing to self-isolate. Among employee members, the majority of workplaces have been reported as closed – no surprise given the nature of the sector – with relatively few reporting remote working instead. In either case, the reach and effectiveness of government's mitigating interventions – CJRS and the Self-Employment Income Support Scheme (SEISS) – becomes a particularly pressing issue for CIMSPA members.

Effects on activity

Additional recent research looks at how the lockdown has translated into changed activity.³ They report that 52 per cent of public respondents (n=63,210) report being significant less active

(19 per cent) or less active (33 per cent) since the beginning of lockdown.

For the sector, there is an appetite to return to using sport and fitness facilities after lockdown ends – 66 per cent intend to return to pre-lockdown levels, 22 per cent to use it more, and just 12 per cent to use facilities less or not at all.

On the latter point, most customers reporting an intention to use facilities

less or not at all than before are motivated by continuing their current practice of activity

independently and outdoors, rather than desisting activity, although 15 per cent intend to use facilities less because they anticipate not being able to afford the cost. That theme of potential belt tightening shows through in very few (7.5 per cent) reporting being prepared to spend more money in future on sport, exercise and being active.

Just as the needs of lockdown can reduce demand for sport and fitness facilities, the same research suggests it can increase demands elsewhere – 68 per cent said they would maybe or definitely use online classes if they were offered in future. At the same time, the personal touch is still valued – 46 per cent of respondents said that they missed the motivation provided by instructors.

As well as financial challenges, CIMSPA members have reported further support needs around:

- **Mental wellbeing**
- **Using technology to host remotely**
- **Advice and information on the future**
- **Continued training**

2 CIMSPA (2020) Covid-19: Sector Impact. Phase One Report. Loughborough: CIMSPA.

3 Leisure-net Solutions Ltd (2020) The National Post Lockdown Recovery Survey. Summary Report (May). Leisure-net Solutions Ltd and partners.

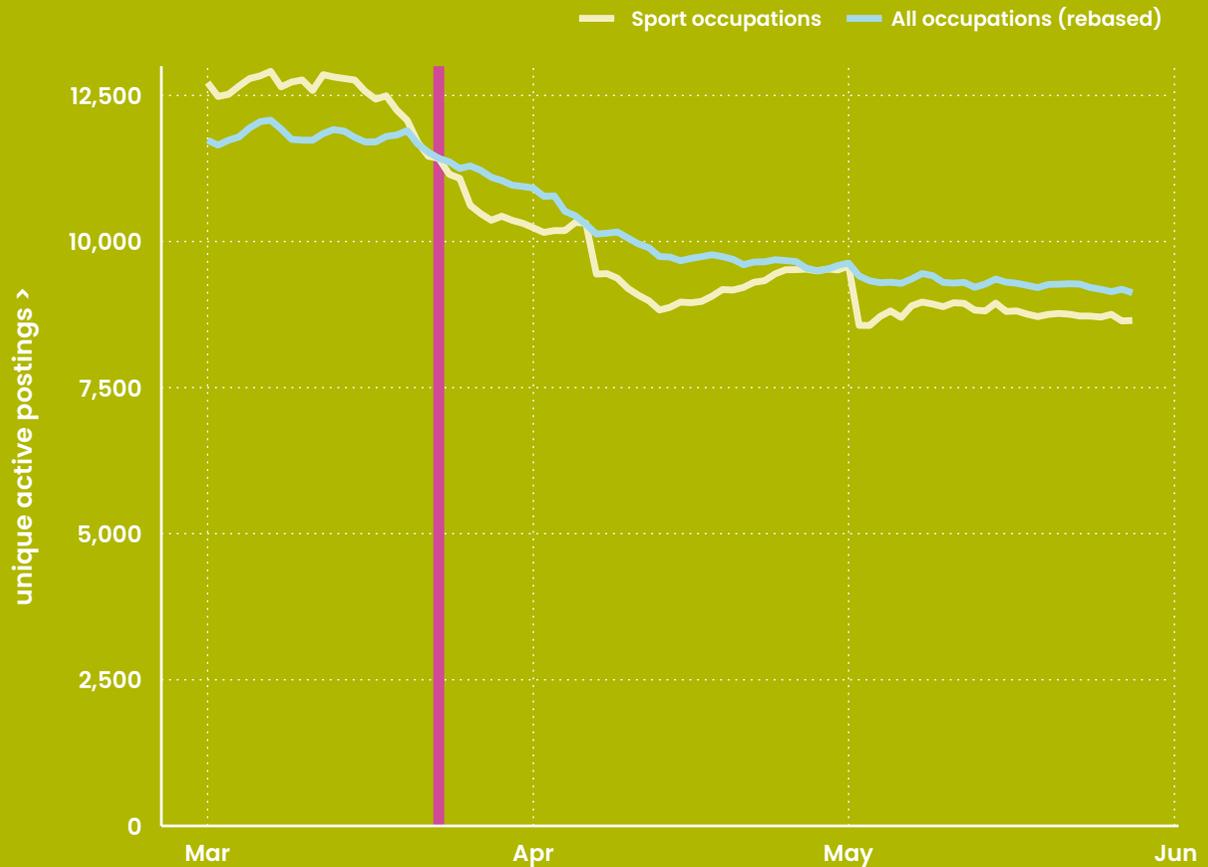
Sustained fall in demand

Using Job Posting Analytics we can (chart, right) compare the trend of sports and physical activity occupations to the trend for all occupations, rebased to the same volume as found for sport and physical activity occupation on 23 March 2020 (the beginning of the official lockdown, indicated by the pink vertical line). Having been relatively stable during early March, with the number of unique active postings typically above 12,500 across the UK, the escalation of measures during the third week of March saw the beginning of a sustained fall in active postings, faster than that seen in the wider economy, stabilising at a level around 8,500 unique active postings during May.

31%
drop in active postings

Significant drop in active postings since mid-March

31 per cent reduction comparing May with early March



Data: Emsi Job Posting Analytics

Sharp stop to new postings

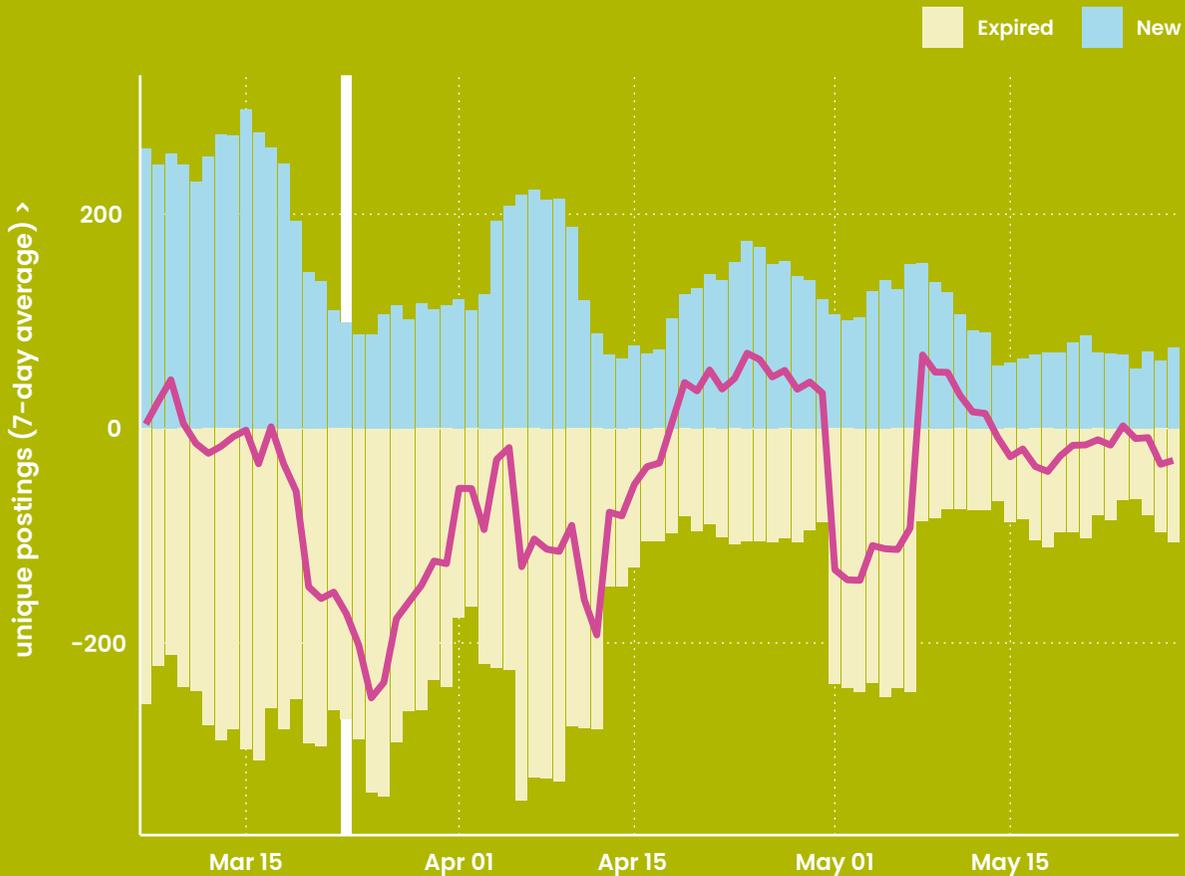
'Active' postings include all those currently to be found online, and can include a volume of standing postings which are used to gather interest. For that reason, to gain a better view on the underlying trend, we can look (chart, right) at the flows into and out of the active posting total. These flows tend to be noisy⁴ and so we measure them using a 7-day moving average, with the pink line representing the net movement into and out of the active total.

We can see that most of the change in postings has come about by a series of large drops in new postings being added to the labour market. While there have been recoveries, these have been short-term in nature and further drops have taken the level lower. Whereas before the lockdown began to be discussed there were typically 200 new postings added every day, there are typically now around 70 new postings added every day. Expiry has been less a part of the story, except that at the start of May there was a rush of postings removed – this may have been pre-programmed from advertisements placed before lockdown began.

⁴ For simple transactional reasons e.g. very few postings are added or taken away on a Sunday.

Most falls come from reduction in net postings

65 per cent reduction in daily new postings since early March



Data: Emsi Job Posting Analytics

Changes by role

The same kind of analysis is produced here for each of the four main advertised occupations for sports and physical activity. As is discussed later, posting activity is much greater for fitness instructors, and so its volumes drive much of the trends discussed above – the smaller recoveries and the drop-off at the start of May are all accounted for by fitness instructor postings. In fact, in this time, 9,083 unique fitness instructor postings have expired, and been replaced by 6,942 new ones, accounting for half of the net loss in active postings.

The most decisive shift visible among other occupations is for sport and leisure assistants, which were being added at around 30 or 40 postings per day at the start of March and are now averaging only a handful of new postings per day – reflecting perhaps their concentration in physical environments, demand for these roles seem to have effectively closed off until lockdown conditions are loosened.

Largest movements among fitness instructors

New posting for assistant roles nearly dried up in May



Data: Emsi Job Posting Analytics



Defining the labour market



Defining the labour market

Sport and physical activity has become an increasingly important labour market with the increase in demand for sport classes, fitness training, leisure and professional performance. But as a labour market it sits across industries and roles, and to provide a context for understanding how it is changing, the first task is to define the shape and size of the sector.

Locating the labour market

The relative novelty of sport and physical activity as a distinct labour market means that the categories for understanding it, and the level of discussion about it, is much less well-developed than is the case for more traditional industries, such as manufacturing. Working through how the labour market is organised – in terms of businesses as well as workers' job roles, and how they in turn are structured, and who performs them – becomes as important as estimating the quantities involved in those different parts of the market.

In this chapter we focus on those questions: rather than looking at how the sport and physical activity labour market is changing, we look to evaluate what it looks like on the basis of the most recent available intelligence. The intelligence set

out here can help to find future discussions of the sport and physical activity labour market. We start by looking at five industries, which as we entered 2020 were estimated to account over 416,000 jobs.

By looking at the occupations which make the sport and physical activity industries' workforce so distinctive, we identify five professional occupations which allow us to look at the labour

170,000 are within the sport and physical activity industries, with the remainders spread across a range of hospitality and education workplaces.

Then we turn to look at those within the same occupations who don't have a job at a recognised workplaces – mostly freelance self-employed people, and then a few who are full-time volunteers. There are nearly 76,000

in this category, and so from looking simply at the sport and physical activity industries to including sport professionals in other industries, freelancing and self-employment, we have gone from a labour market size of over 416,000 jobs to one of nearly 585,000 individual roles. We round off the chapter by exploring some of the facets of the

professional workforce, including age, gender, ethnicity and nationality.

585,000
labour market size

market from a different perspective – together they account for over 262,000 jobs, but only

Different dimensions

There's a critical distinction here between *industries* and *occupations*, the two lenses through which the Office for National Statistics (ONS) organises its statistics on economic activity, including employment. Industries are defined by the primary economic activity of a *workplace* – a stadium or a fitness club is in the sports industry even though it will employ not only sports professionals but also e.g. finance officers,

cleaners or marketing directors. Occupations are instead by the function of the individual worker's *role*; fitness instructors are always working in a sport and physical activity role, even if they happened to work in a non-sports workplace, such as a hotel.¹

Industries are classified under the ONS Standard Industrial Classification (SIC), last revised in 2007. SIC is a taxonomy which seeks to capture every kind of workplace by its primary economic activity

in one of hundreds of different categories. SIC is used whenever companies are registered at Companies House, and it's also used whenever a workplace is documented in one of the ONS's surveys – for example, when workplaces receive the Business Register and Employment Survey, they define what they do using SIC, or when employees participate in the Labour Force Survey, their description of what workplace they work in is categories using SIC. SIC is made up of 616 industry 'classes' which are themselves members of groups, divisions and sections, in a single hierarchy.

Occupations are classified similarly under the ONS Standard Occupation Classification (SOC), last revised in 2010, and due to be replaced in 2020. SOC works the same as SIC, but for the roles people perform rather than the workplaces they perform them at. SOC is used in the Census every ten years, to capture what people do as their primary occupation, and also if employees participate in the Labour Force Survey. The ONS maintain an index of job titles which are categorised into 369 'unit groups', which like SIC classes, exist in a hierarchy and so can be aggregate up into minor groups, sub-major groups and major groups of occupations.



¹ The hotel could include a large fitness facility, but as an overall workplace its primary function is to provide accommodation, not to provide fitness facilities.

From SIC, CIMSPA identified the following industry classes as reflecting most of the workplaces it would deem as making up the sport and physical activity industry:²

Sports and recreation education (SIC 8551)

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.

Operation of sports facilities (SIC 9311)

For indoor or outdoor sports events (open, closed or covered, with or without spectator seating) such as football, hockey, cricket, rugby stadiums; racetracks for car, dog, horse races; swimming pools and stadiums; track and field stadiums; winter sports arenas and stadiums; ice-hockey arenas; boxing arenas; golf courses and bowling lanes. Also, organisation and operation of outdoor or indoor sports events for professionals or amateurs by organisations with own facilities, and managing and providing the staff to operate these facilities.

Activities of sports clubs (SIC 9312)

Includes the activities of sports clubs, which, whether professional, semi-professional

or amateur clubs, give their members the opportunity to engage in sporting activities.

Fitness facilities (SIC 9313)

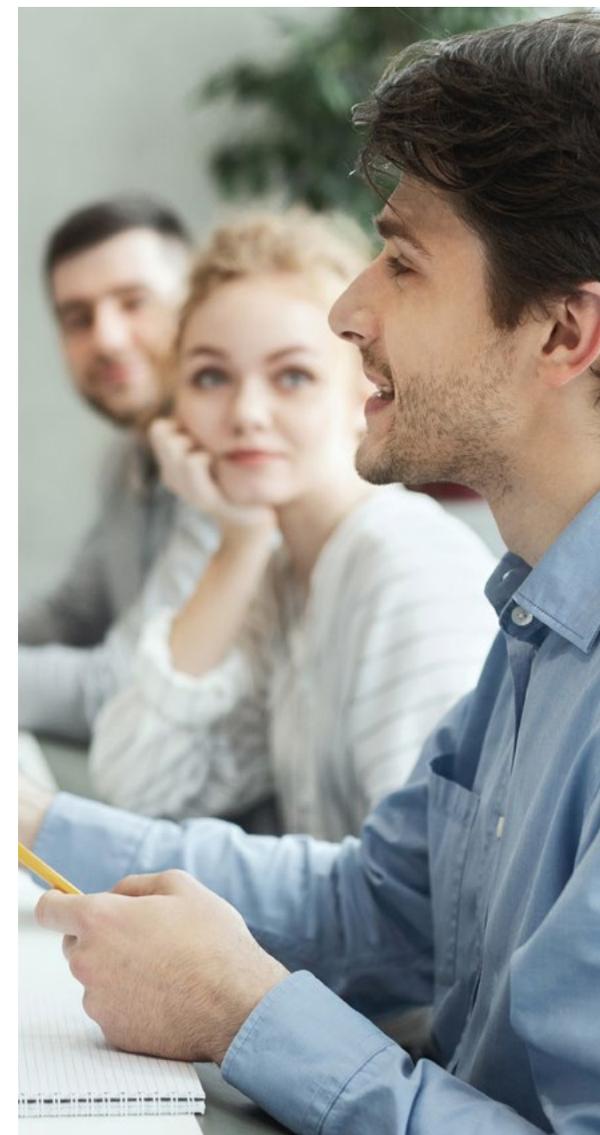
Includes fitness and body-building clubs and facilities but excludes sports instruction by individual teachers and trainers.

Other sports activities (SIC 9319)

Covers a range of activities in sport which are not classified under the previous industry classes.

Sports industries

The five industries we have identified as the sport and physical activity sector together employed an estimated 416,080 jobs in 2020 (see table, next page), with sports clubs (164,300 jobs) and sports and recreation education (144,660 jobs) accounting for three-quarters of sector employment estimated for 2020 between them – fitness facilities and sports facilities are much smaller (41,550 and 41,500 jobs, respectively) by comparison. We set out a few other of the most recent data points to support further analysis. Earnings is estimated for 2019, given the mix of occupations within each industry. What's noteworthy here is the large disparity within the sector – sports clubs (£14,971) and 'other sports activities' (£12,710) showing a low level of earnings – half as much – when compared with fitness facilities (£33,927) or sports and recreation education (£29,675).



² Descriptions are adapted from UK SIC 2007.

Enterprises and workplaces are the way the industry is organised in terms of businesses: workplaces are individual establishments, while enterprises are organisations – one organisation can have one or more workplaces. What’s clear here again is the diversity between industries: the mean average sports club workplace has 17 jobs, while it’s 37 for sports and recreation education, and just over 2 for other sports activities. Overall, the sports industry has fewer micro workplaces than the wider economy – 62 per cent of workplaces have fewer than 5 jobs, compared to 71 per cent nationally.

There is certainly an interaction between industries and occupations: different industries tend to employ different occupations – but these are not neat and tidy, as industries nearly always employ non-specialist workers, and specialist workers appear in other industries. Even sports industries, a highly specialised sector, have around a third of their workforce organised in a way which reflects the wider economy.³ For that reason, occupations need to be understood as an overlapping concept with industries, not subordinate to them.

³ Analysis from a Krugman similarity measure comparing estimated sports industry jobs and total jobs.

Jobs	Earnings	Enterprises	Workplaces	
163,300	14,971	9,040	9,625	Activities of sport clubs
41,550	33,927	3,445	4,600	Fitness facilities
41,500	20,958	4,755	7,610	Operation of sports facilities
25,070	12,710	10,815	11,045	Other sports activities
144,660	29,675	3,725	3,825	Sports and recreation education
416,080	22,437	31,780	36,705	TOTAL

Data: Emsi 2020.1 and UK Business Counts via Nomis

We use here an analysis to identify the occupations which are most distinctive to sport and physical activity workplaces, where most jobs are within the industries. From that analysis, the following five occupations from ONS SOC are selected:⁴

Leisure and sports managers (SOC 1225)

Organise, direct and co-ordinate the activities and resources required for the provision of sporting, artistic, theatrical and other recreational and amenity services.

Sports players (SOC 3441)

Includes professional sportsmen and women who train and compete, either individually or as part of a team, in their chosen sport for financial gain.

Sports coaches, instructors and officials (SOC 3442)

Work with amateur and professional sportsmen and women to enhance performance, encourage greater participation in sport, supervise recreational activities such as canoeing and mountaineering, and organise and officiate at sporting events according to established rules.

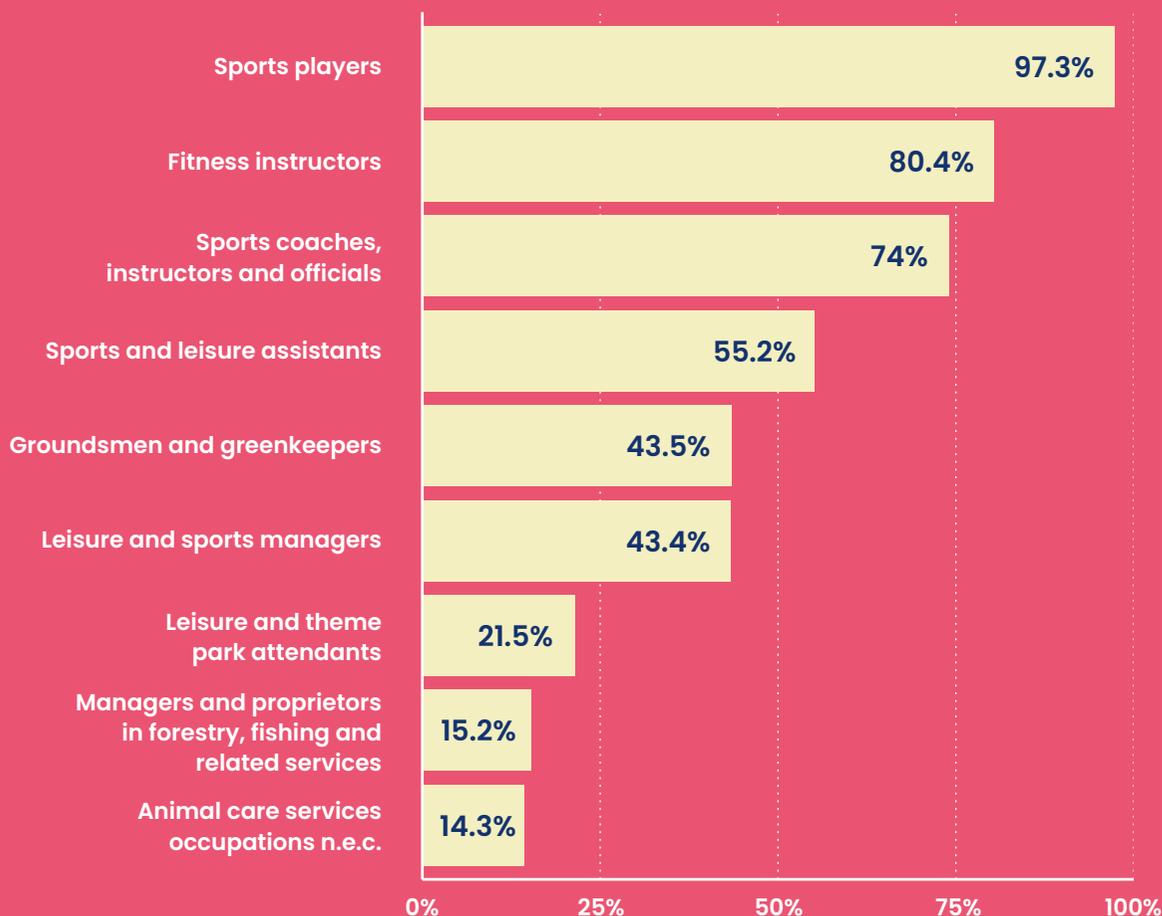
Fitness instructors (SOC 3443)

Deliver training in a range of fitness activities at private health and fitness centres, local authority run sports and leisure centres, other public and community establishments, and in private homes.

⁴ Descriptions are adapted from UK SOC 2010.

Occupations' presence within the industry

Share of jobs within sport and physical activity industry



Data: Emsi 2020.1

sport and physical activity industry % share >

Sports and leisure assistants (SOC 6211)

Provide and maintain facilities for sporting and recreational activities and supervise their use, maintain the continuity of entertainment and social events, offer odds and accept bets on the result of sporting and other events and control gambling activities.

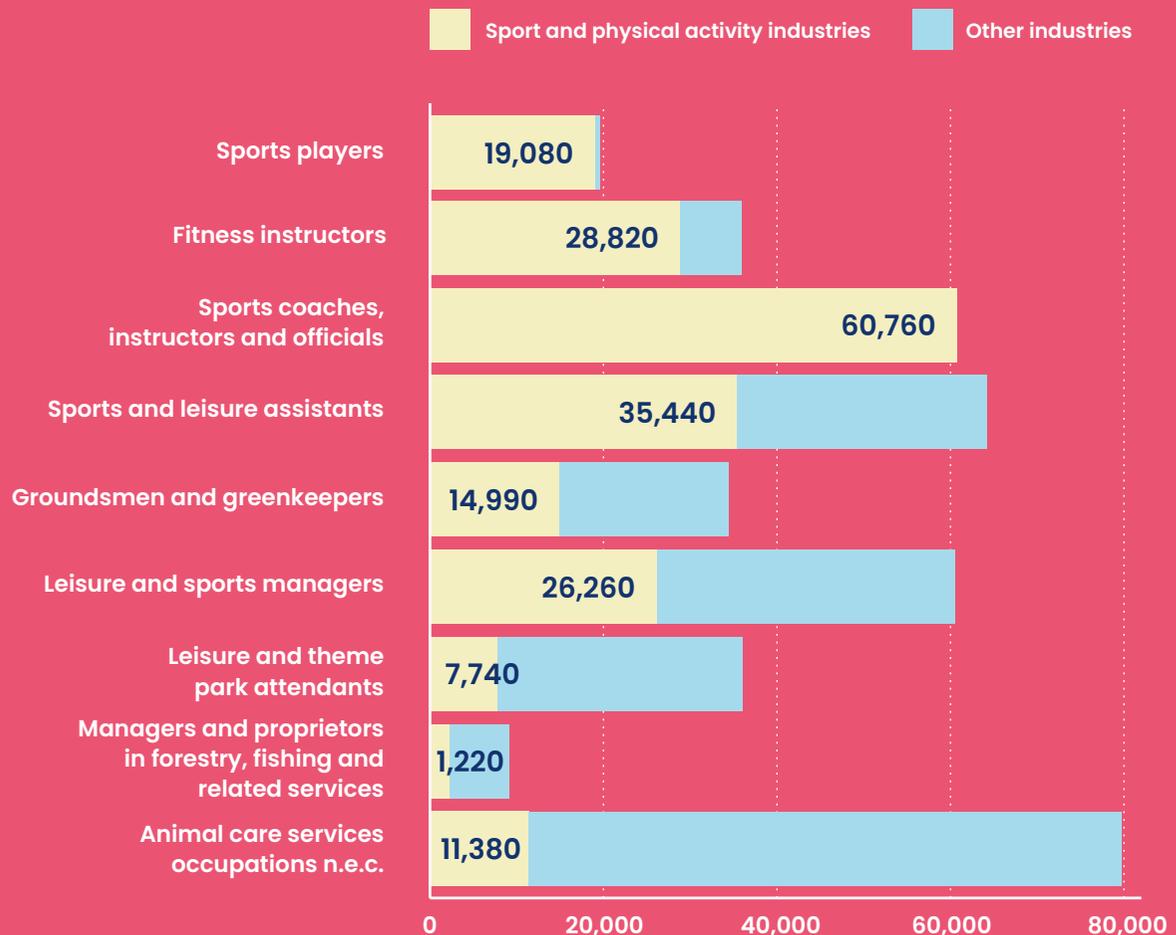
Understanding the sport and physical activity labour market requires us to look at *both* industries and occupations, and to appreciate that not all industry employees perform sports-related roles, and not all sports-related workers are in sports workplaces.

Sports professional roles

To identify sports professional roles, we use two intuitions: they should all have demonstrable sports content, but they should also be intensively employed within sports industries. We take the five sports industries and look at their *staffing pattern*: the composition of their jobs by occupation, and compare it to the mix of jobs across the whole economy. By dividing each occupation's share within the sports industry by its share within the whole economy, we produce a concentration metric, which gives us the top ten candidate occupations.

Sports coaches – the largest role within the industry

Number of jobs within and outside sport and physical activity industry



Data: Emsi 2020.1

jobs in sport and physical activity industry >

We then look at each occupation by the share of jobs which take place *within* the wider sports industry, and the number of jobs that represents (both charts previous page). The wider sports industry accounts for the majority of jobs in each of the top four roles. For those roles and sports and leisure assistants, sports defines the role. Of the remainder, this can only be said for leisure and sports managers; the other roles may all appear prominently within the sports industry, but they have a large presence in other industries and their work is not defined by sport.

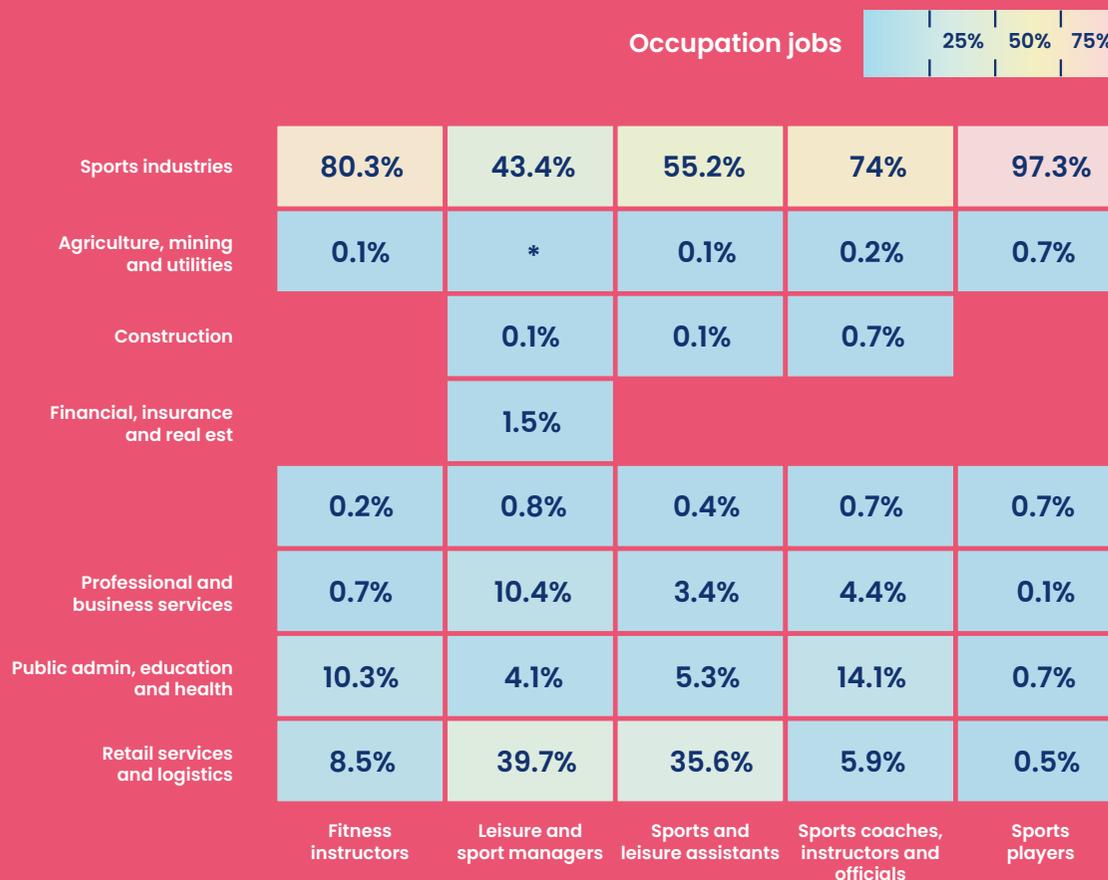
Where sports professionals work

The same staffing pattern can show what *other* industries sport and physical activity professionals work in. This chart sets out the distribution across sports industries and headline industry groupings to highlight the variety of settings some professionals can find themselves. All roles appear in most industry groups – even if in small numbers.

But there are significant shares elsewhere: only sports players could be described as being nearly wholly within the wider sports industry. For fitness instructors and sports coaches, significant numbers are found in public services, education and health. The largest shares outside the industry are found for leisure and sport roles, which likely reflects their broad definition within the ONS SOC taxonomy, with large parts focused on leisure rather than sport.

Retail services important for leisure roles

Public services also important for coaches and instructors



Data: Emsi 2020.1; * denotes below 0.1%.

That high presence in retail and leisure also reflects the breadth of the leisure roles: they also have a part to play outside of the sporting domain. But for fitness instructors and sports coaches, roles in hotels, education and hospitality remain an important source of labour market opportunity.

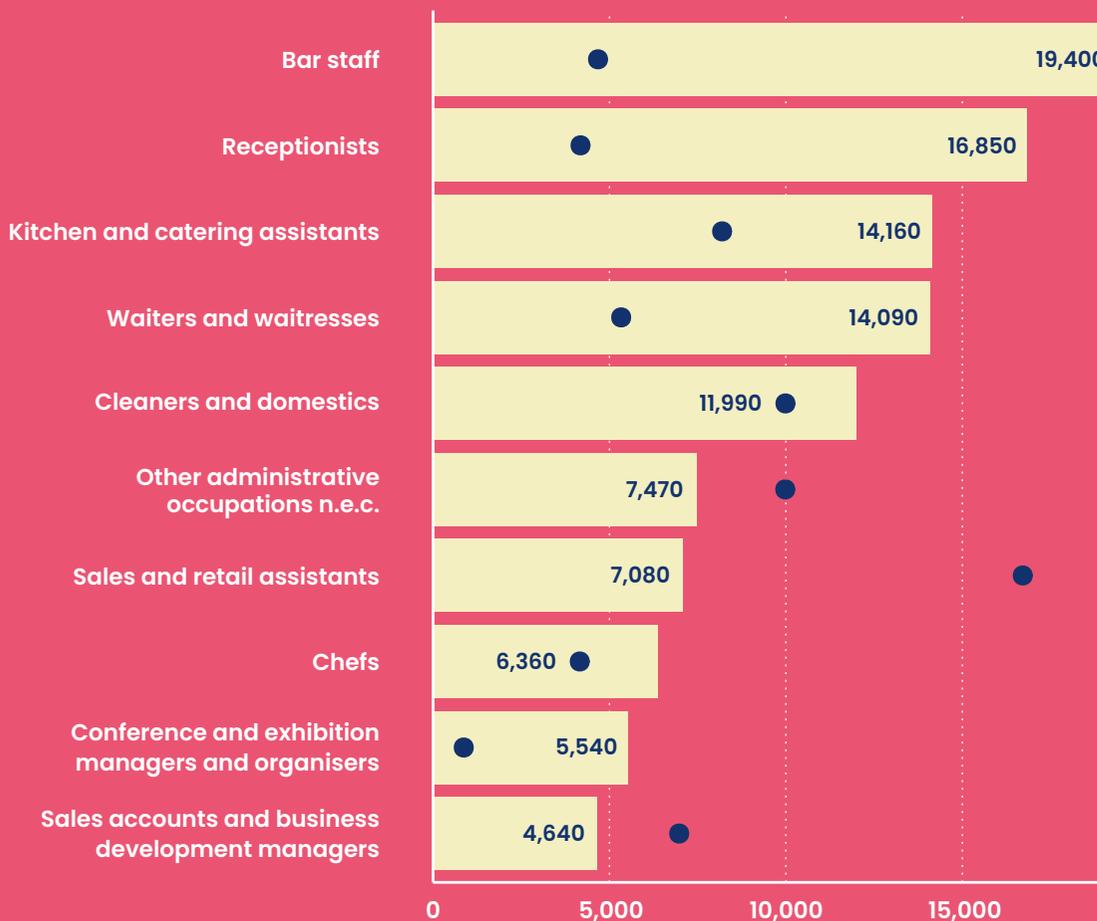
Who else is employed?

Because of their presence in other industries, sport and physical activity professionals in these five occupations account for only 41 per cent of industry jobs, which raises the question of what other roles industry workers perform. We explore that further (right) by looking at the largest other jobs within the industry, and comparing them to the shares those jobs have in the wider workforce – to get a feeling for which roles have a strong concentration in sport and physical activity, and which ones are simply high in number across the economy.

Customer-facing and serving roles dominate: bar staff, receptionists, kitchen staff, and waiters and waitresses make the top four, and are all found more frequently within sport and physical activity industries than in the wider economy – similarly for cleaners and domestics, while e.g. sales roles are many in number, but much less of a feature of sport and physical activity industries than elsewhere.

Hospitality staff dominate other industry roles

High intensity for bar and waiting staff, low for sales assistants



Sport and physical activity industry jobs 2020
(blue dots are cross-industry benchmarks) >

Data: Emsi 2020.1

Employment and demographic variables

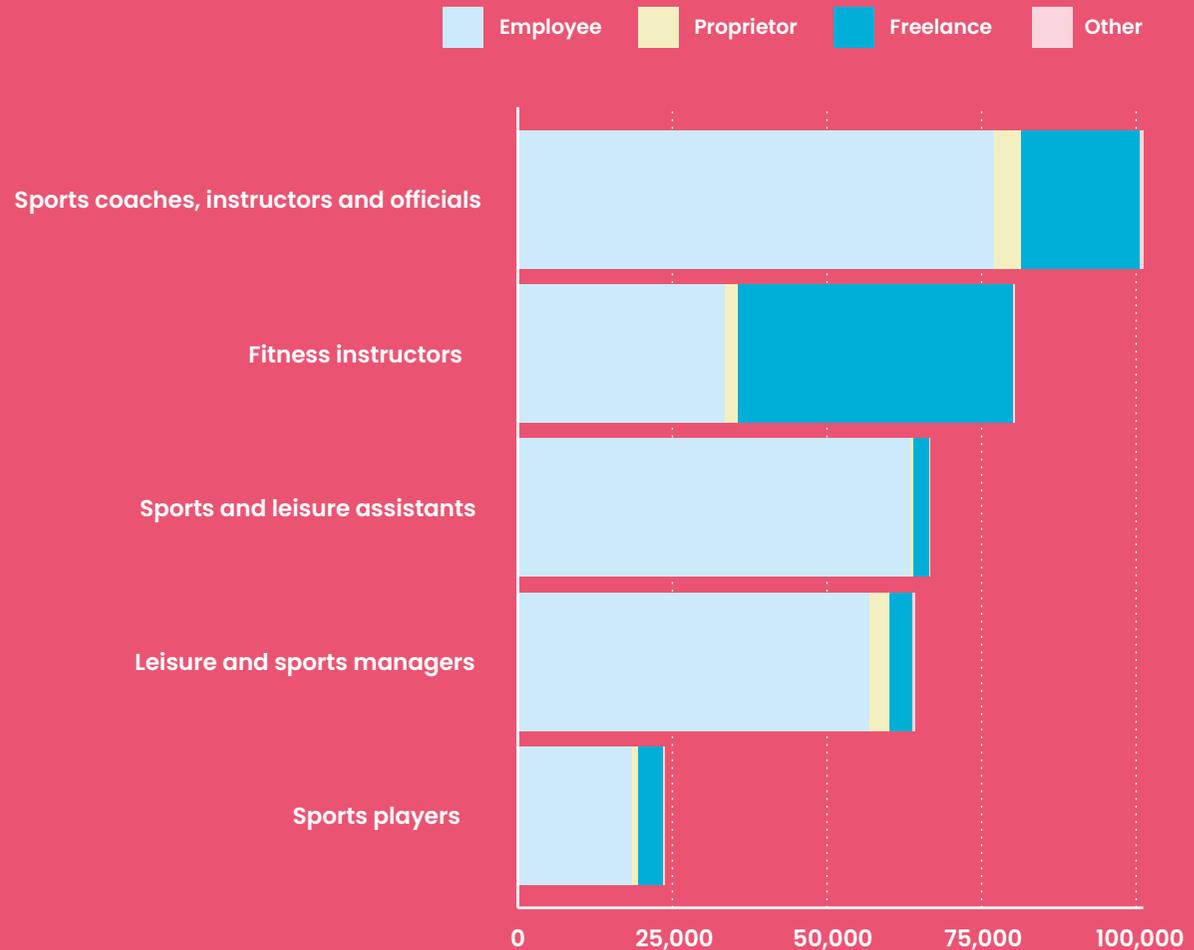
In addition to the overlapping concepts of industry and occupations, understanding the differences in employment status is also important if we are to acquire a full grasp of the current state of the sport and physical activity labour market. On employment status, there is a distinction between jobs within organisations and those who are self-employed, which can be missed from the data.

The most powerful data with which to understand industry employment in the UK is the ONS Business Register and Employment Survey (BRES) which samples large numbers of workplaces (from those registered for VAT and/or PAYE taxation purposes) on a regular basis to understand their industry classification (using the SIC taxonomy) and the number of jobs they employ. This works well for most employment, but it misses a number of the freelance self-employed who aren't leading businesses registered for VAT or PAYE.

This limitation is particularly important in the sport and physical activity sector, because a number of roles – especially fitness instructors – have large freelance workforces not counted under this approach. To ensure we have a full understanding of the total labour market, understanding the role of freelancers, as well as full-time volunteers, becomes important.

Freelancing dominates fitness roles

Also important for other sports roles



Data: Emsi 2020.1 and analysis of ONS Annual Population Survey via Nomis

Freelancing vital to fitness

As already noted, a limitation of job-based data is that while it does capture those owning workplaces (described here as 'Proprietors'), it can miss the role of freelancers – self-employed people working on their own account, with no employees – if they are not submitting information for VAT or PAYE compliance purposes. In the sport and physical activity industry, this is known to be the experience of many professionals and so a further analysis is provided here on 2019 data to understand the scale of freelancing not captured within the jobs-based data already explored.⁵ The same data also provides an insight onto the number of people declaring sport and physical activity professions to be their primary occupation outside of employment or self-employment, typically e.g. full-time volunteers (described here 'Other').

Overall, across the professional workforce described by these five occupations, traditional employee jobs have declined as a share of the total occupational labour market – from 80 per cent in 2010 to 74 per cent in 2019. Meanwhile, freelancers have increased significantly, from 16 per cent of the market to 22 per cent. Proprietors and Others have been stable at around 3 per cent and 0.5 per cent respectively. It's worth noting that because of growth⁶ in the sport and physical activity labour market (explored further in the

next chapter), the number of employees has still increased over this period, but freelance roles have increased by 67 per cent.

For fitness instructors and sports coaches, freelance work is especially important (chart, previous page). An estimated 55 per cent of fitness roles in 2019 were freelancers, and 19 per cent for sports coaches, instructors and officials. Even for other roles, freelancing makes a significant contribution, with 6 per cent of leisure and sports managers and 17 per cent of sports players also freelance. For 'Other', it is relatively small – just 1 per cent of sports players, and much less for other roles.

67%
increase in freelance roles

Mapping the labour market

The visual on the following page brings together all of the intelligence on industries, occupations, and freelancers, breaking the sport and physical activity labour market into industry professionals – professionals in the industry; professionals elsewhere; freelancers and others; and other roles in the sport and physical activity industry. The total labour market accounts for an estimated 584,650 roles, 58 per cent of which are held by sport and physical activity professionals in some capacity.

Of that 58 per cent, half (29 per cent of the total) are professionals working in the sport and physical activity industries, and then just over a quarter

(16 per cent of the total) are professionals working in other industries; the remainder (13 per cent of the total) are professionals working freelance (outside the PAYE and VAT compliance regimes) and with other employment status. The analysis highlights the need to look across industries and occupations to get a view of the whole sector: industry jobs account for 71 per cent of the total, while professional jobs account for 45 per cent of the total – using either industries or occupations, or missing out on the freelance part of the labour market, can all lead to a significant underestimate of its size.

The whole story?

One of the challenges of a relatively new industry is that the categories we use to measure economic activity can be slow to adapt to its emergence. In the case of sport and physical activity, there is a further challenge because of its history and its place in society: a lot of sport and physical activity work is undertaken in voluntary and hobby capacities, with a less tangible economic presence.

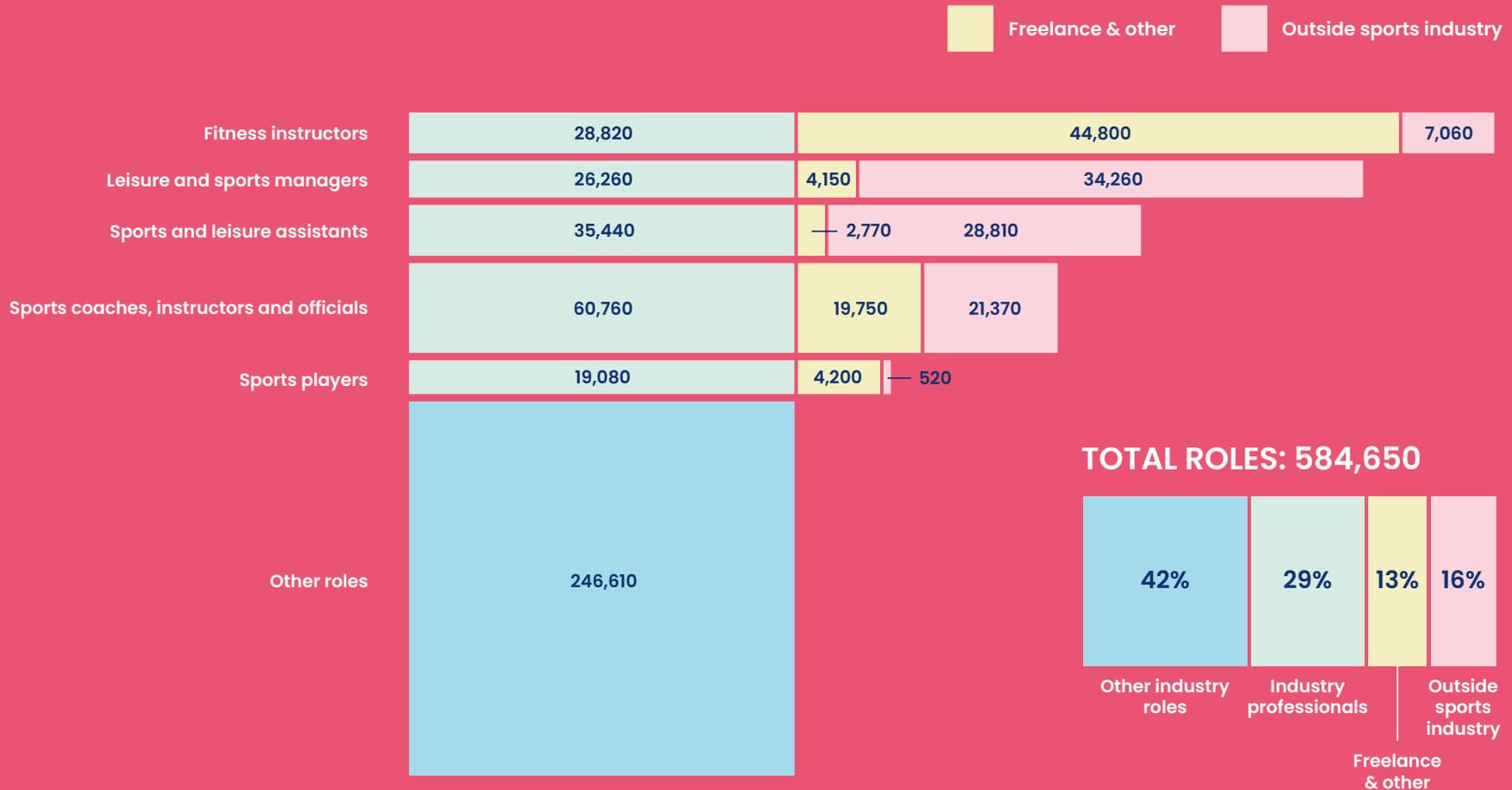
Taken together, these two challenges suggest we should take a critical eye to the estimates presented from traditional sources of labour market intelligence, and supplement with other sources of evidence to fully understand the scale of the sports workforce in its fullest sense.

⁵ The approach taken is described in Appendix B.

⁶ Growth trends are explored further in the next chapter.

Mapping the sports labour market

A full accounting of professionals in and out of the industry, and other roles



Data: Emsi 2020.1 and analysis of ONS Annual Population Survey via Nomis

The coaching workforce

Different forms of labour market intelligence are better at capturing different forms of work in the sports sector. Data on industry jobs capture those roles employed in workplaces registered for PAYE and VAT, but miss some of those working freelance, or those working as volunteers. But there are many others who perform sports roles in addition to their day jobs, some paid and some not, and they provide important context for the more professional, dedicated labour market.

That requires looking from a different perspective, and requires dedicated survey research. UK Coaching has been commissioning survey research with YouGov for this purpose, with samples of 50,000 adults asked about their involvement in sport and physical activity coaching.⁷ They estimate some 3.3 million people in 2017 and 3 million people in 2019 were involved in coaching work, much more than those estimated from the labour market intelligence—that difference is worth exploring in some depth.

A layered workforce

The most important factor in explaining the difference is that the bar for inclusion within the

‘coaching’ total is much lower than that used in labour market intelligence. To feature in labour market intelligence, there has to be a contractual employment relationship, or a role considered to be a primary occupation. In the UK Coaching survey, only 8 per cent of the total number of coaches report it being their primary occupation (c.240,000), and only 21 per cent report working in a paid capacity (c.630,000) — at least 71 per cent (c.2.13 million) of coaches are neither paid nor see it as their primary occupation.

3.3 million people in 2017 and 3 million people in 2019 were involved in coaching work.

Other measures help to add further context for that —for example, 22 per cent of coaches describe themselves as ‘helpers’. 67 per cent of coaches describe themselves working at ‘recreational’ level, which will likely cut across the voluntary and professional divide. Among the 630,000 who are paid, there is a long tail of low-engagement cases: 49 per cent (c.309,000) are paid only for 1 to 2 hours of coaching per week. While industry jobs data should account for coaches employed in registered workplaces, the nature of the transactions that some are not counted as ‘jobs’. On that basis, the two volumes of 240,000 (primary occupation) and 321,000 (paid for more than 1 to 2 hours per week) seem to give us a sense of the core coaching workforce, which ends in similar quantities with 101,100 sports coaches, instructors and officials and 80,400 fitness instructors and some share of the 131,100 sports and leisure roles.

That said, and while beyond the scope of this report, the distinctive role of low-intensity, paid and unpaid workers in supplying coaching services is an important further dimension of the sport and physical activity labour market. The professional and primary occupation labour market focused on here and accounted for in the labour market intelligence is a small but important part — about 1 in 10 of coaches, but likely providing half or more of its working hours⁸ — but understanding the layer of voluntary and side job activities which account for the remainder is an important part of capturing the full range of activity.

7 Beth Thompson, Lisa Whitaker and Ann-Marie Bunyan (2020) Coaching in the UK, 2019: Coach Survey. Statistical Report. Leeds: UK Coaching.

8 As a crude calculation: if 1 in 10 coaches (the professional labour market) work an average of 30 hours each, and 9 in 10 coaches work an average of 3 hours per week (more than half work only 1 to 2 hours per week), then across 3 million coaches it's 17.1 million working hours per week, 9 million of which are provided by the professionals.

SOC and SIC limitations

That discussion, and some other points, hit upon the limitations of the SIC and SOC taxonomies in understanding the sport and physical activity labour market. Classification is challenging, with trade-offs between granularity and usability, but there are additional challenges where an industry is fast-growing because additional detail becomes more important. These challenges are particularly acute in the SOC taxonomy because of the grouping of sports and leisure roles for assistants and managers. As the staffing pattern analysis showed, there are large proportions of these roles employed across non-sports sectors, and given the scope of the roles it seems likely that a large number of them are engaged in leisure work rather than sport and physical activity work, which makes it difficult to identify a clear boundary.

Even with the labour market mapped and quantified for roles across industries and employment types, it tells us little about the state of the workforce delivering in sports professional roles. The diversity of age, gender and ethnicity, as well as the migration dependency of the sector's professional workforce, has significant implications for workforce planning, especially amidst trends such as aging and changing migration policy.



Age and gender

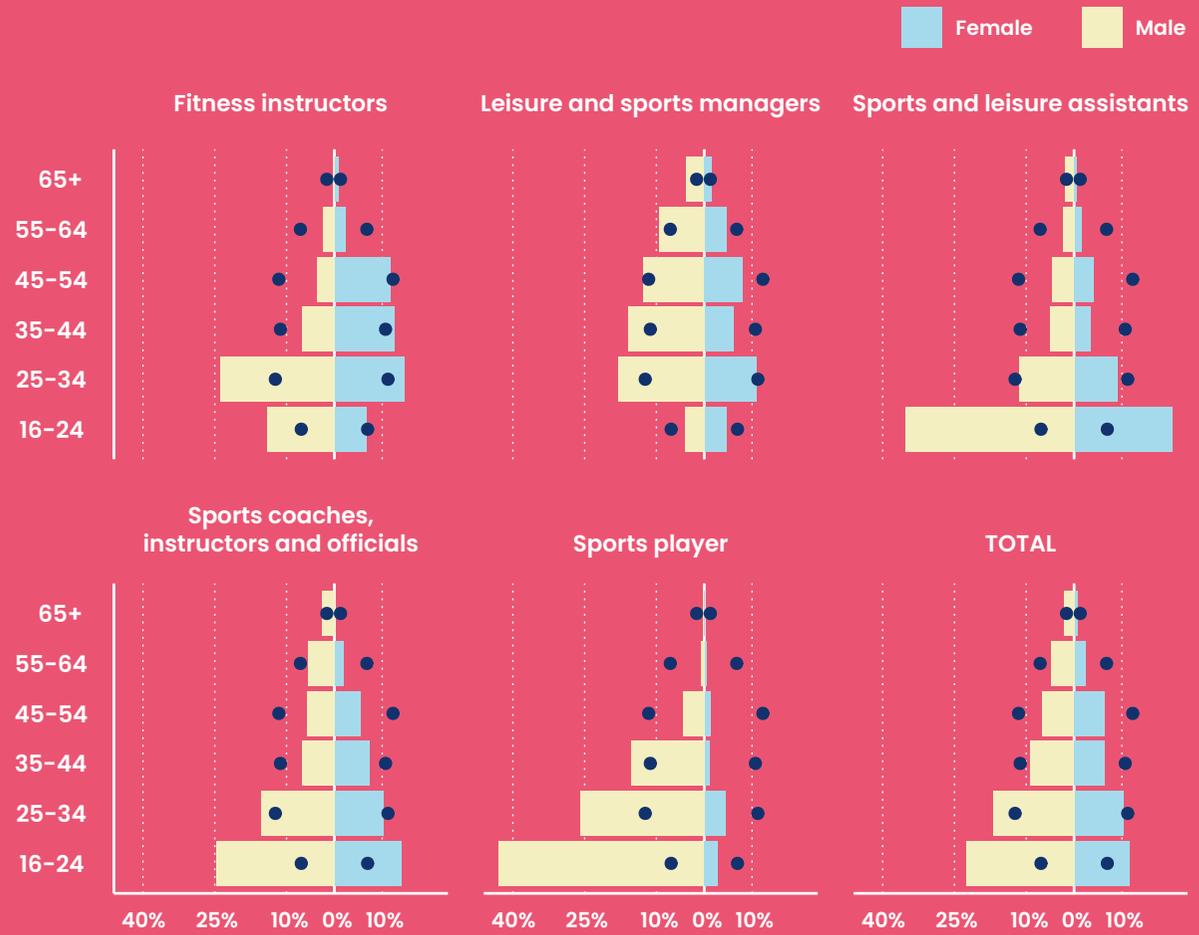
We look first at age and gender, using a 'population pyramid' style analysis (right), which breaks down each occupation into six age groups and two gender categories available from labour market intelligence. Each of the five professional occupations is measured, along with the total across the five, and the blue dots show the levels across the UK workforce.

It's immediately striking that the workforce is overwhelmingly young and male. Across all occupations, 34 per cent of jobs are held by 16 to 24 year olds, more than double the (14 per cent) share of the whole workforce; across the two lower age bands (i.e. 16 to 34 years old), it rises to 61 per cent in sport and physical activity occupations and 37 per cent generally. Similarly, while 51 per cent of jobs nationally are held by men, this rises to 62 per cent for sport and physical activity occupation roles. 23 per cent of all professional jobs are held by men aged under 25, more than triple the share of the wider workforce.

There are several reasons why certain roles may tend towards younger age groups, including rapid industry growth but also reasons (especially for professional sports players) linked to the physical demands of sports; because of pay levels and experience requirements, sports and leisure assistants will also be attractive to early-career workers.

A young, male workforce in all sport roles

All but leisure and sports managers have high shares of young men



Data: Emsi 2020.1

< per cent of workforce (blue dots are UK-wide) >

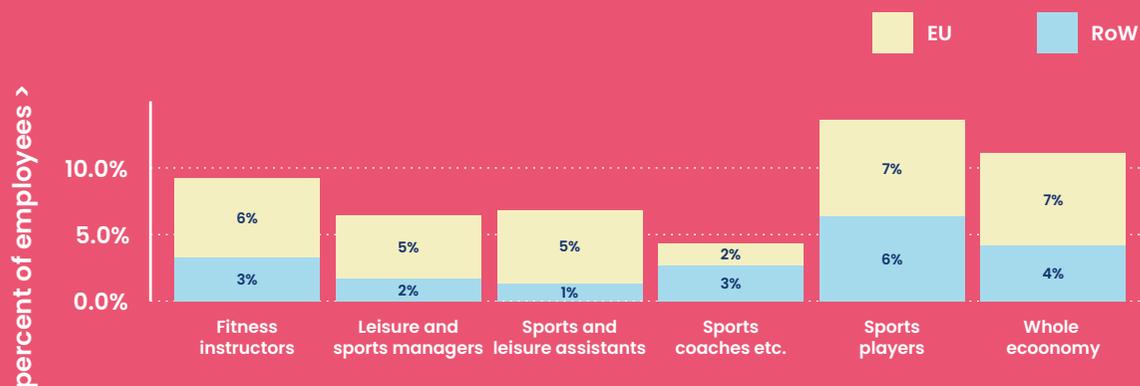
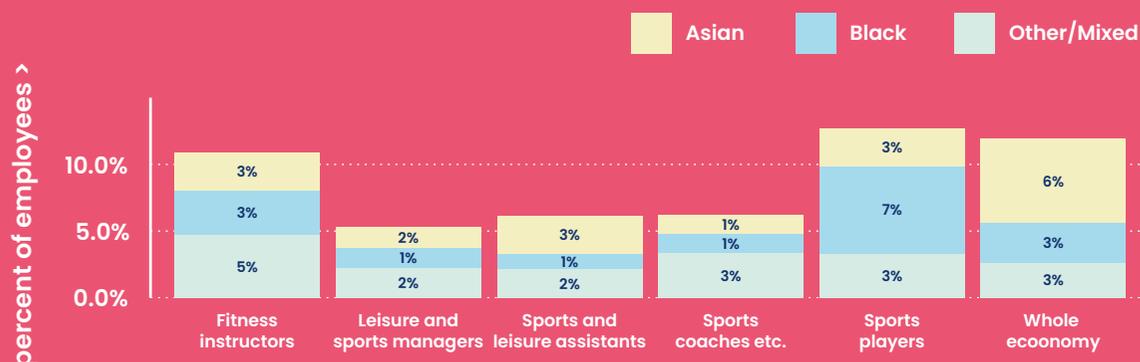
Ethnicity and immigration

In terms of ethnicity (chart, right), overall the professional workforce is less ethnically diverse than the wider workforce in the UK economy: 7 per cent of employees with professional roles as their primary occupations were minority ethnic compared to 12 per cent more generally. This differs substantially by occupation: sports players are more diverse, with 13 per cent minority ethnic, including a high representation of black people, and fitness instructors are 11 per cent minority ethnic.

Looking at nationality, a similar story is found: 7 per cent of the professional workforce are from non-UK nationalities, compared with 11 per cent across the wider workforce in the UK economy, with a similar split between EU nationals and those from the rest of the world (RoW). The sports coaches labour market has the highest level of British workforce, which may reflect its demands in terms of communication and language skills. Sports players has the highest number of EU nationals in its workforce, and so may be relatively more vulnerable to disruption from post-Brexit immigration arrangements, although sports and leisure assistant roles – while very low for migration-dependency overall – are much more likely to recruit from the EU than from the rest of the world.

Sports players more ethnically diverse and migration-dependent

Sports professionals generally less diverse and migration-dependent than nationally



Data: Emsi analysis of LFS (12 quarters pooled)



 **CIMSPA**

The changing picture

The changing picture

Between 2003 and 2017, the sport and physical activity industries together added nearly 129,000 net new jobs, representing a cumulative 42 per cent growth – sustained in spite of the financial crisis and ensuing recession during that period. Although job numbers tailed off a little in the last few years, overall the trend has been especially strong.

Robust growth

In this chapter, having explored what the sport and physical activity labour market looks like, we now turn to look at how it has changed and is changing over time. We again use industry, occupation and employment status to guide our analysis, but we also add a further dimension, looking at the trends in recruitment, as we can observe through online job postings.

The headline is that, from any dimension, sport has seen strong growth, especially in the past decade. Between 2012 and 2017 especially, the

industries together saw 4 per cent annual average growth, allowing them to outpace the wider economy. Job creation has been driven by the operation of sports facilities, adding nearly 41,000 jobs from 2003 to 2020.

At an occupational level, it's been fitness instructors and sports coaches who have added around 38,000 jobs over the same 2003 to 2020 period, sustaining average annual growth above 2 per cent – particularly impressive given the presence of a deep recession in that period, which seemed to have only a muted effect on the demand for sports professionals.

Freelancers and recruitment

As we have already alluded to, the prominent role of freelancers in the labour market has emerged strongly over the past decade: freelance roles have grown by two-thirds since 2010, compared to 17 per cent for industry professional jobs and 10 per cent for professionals jobs in other industries. Traditional jobs have led in volume – 59,200 jobs added from 2010 to 2019, compared to 29,600 additional freelancers – but the balance is shifting.

Robust growth in employer demand shows through in recruitment trends, with online job adverts effectively doubling in volume from 2016 to the start of 2020, with the largest part of the increase driven by increasing recruitment for fitness instructors. That intense recruitment environment shows through to high advertised salaries for fitness instructors roles relative to established professionals' pay, and also to typically longer lengths of time employers advertise for to find the talent they need.

129,000
new jobs 2003 – 2017

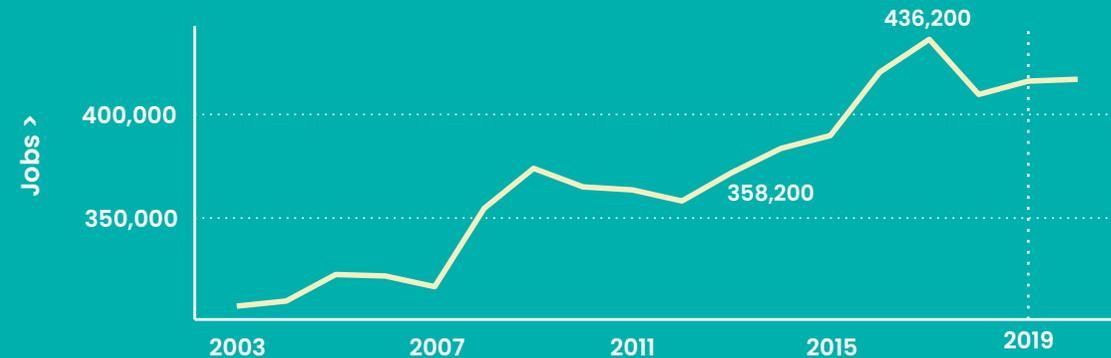
Industry trends

A look at the trend for jobs growth shows that while sometimes variable, the underlying trend is one of strong sustained growth. There have been two strong periods for jobs growth. The first, perhaps oddly given the backdrop of the Great Recession, was during the period 2007 to 2009 – it may well be that government interventions supported some public sector demands on sport and physical activity professional workers, which sustained that sudden expansion, but allowed it to tail off for the years to 2012.

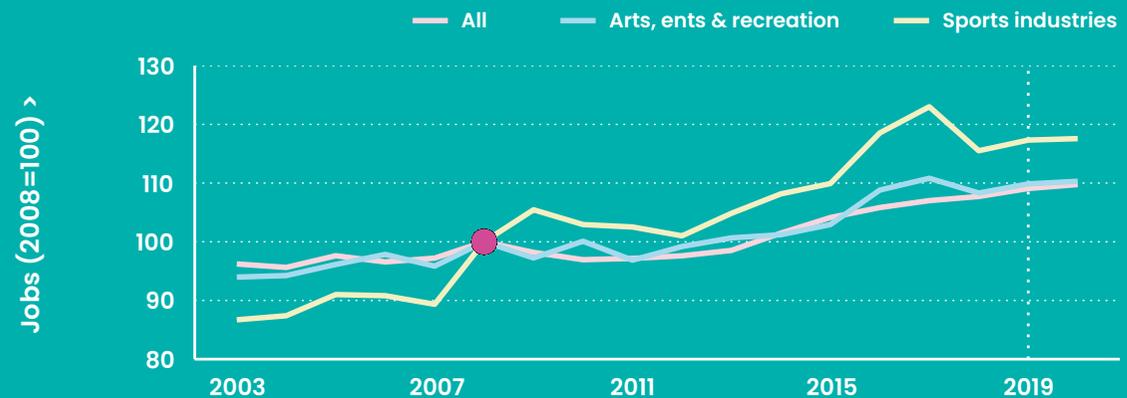
With the highly successful London Olympics in 2012, there followed a second period of strong growth to 2017: 78,000 net new jobs added over five years, representing an average annual growth rate of 4 per cent. Comparisons with other industries and the wider economy are instructive here; since 2008 industry jobs have grown by 17 per cent, while jobs across the UK have grown by 9 per cent and in the arts, entertainment and recreation sector of which several sport and physical activity industries form a part, by 10 per cent. Across the period since 2003, sport and physical activity industry jobs have grown by 1.8 per cent per annum, whereas jobs across the UK have grown by 0.8 per cent per annum. Future trends have a high degree of uncertainty in them, between the effect of the economy following the UK's exit from the European Union, and the effects of the Covid-19 pandemic ongoing at the time of writing.

Rapid growth in the sports industry

109,500 jobs added since 2003, 2% average growth p.a.



Outpacing the wider recreation sector and total economy



Data: Emsi 2020.1

Industry trends

Looking at individual industries, and reflecting on their differences in size, we can see first of all that the largest job creation was in the operation of sports facilities – over the period from 2003 to 2020, it has been one of the major drivers of job creators within the industry, adding nearly 41,000 new jobs and growing at a similar annual growth rate as the wider industry. Much slower growing has been the activities of sports clubs (adding 7,000 jobs, 0.3 per cent per annum), while fitness facilities has seen the fastest growth – 33,000 jobs added since 2003, a growth rate of 10 per cent per annum.¹

Together, fitness facilities and sports facilities' operations account for 74,000 jobs added from 2003 to 2020, with the other three industries adding a further 35,000 jobs in the same period. Both sports and recreation education and other sports activities have seen growth faster than the wider sports industry. The growth in fitness facilities through the 2010s reflects the rapid expansion of the 'budget gym' sector during that time.

¹ The jump in growth from 2007 may reflect fitness facilities' clearer emergence as an industry following the creation of the current SIC taxonomy in that year – see previous chapter's discussion on the challenges of industry classification; although the ONS provides backward classification for previous years, this is not always wholly accurate with relatively younger industries.

Sports facilities the biggest job creator

But fitness facilities fastest-growing: average 10% p.a. since 2003



Data: Emsi 2020.1

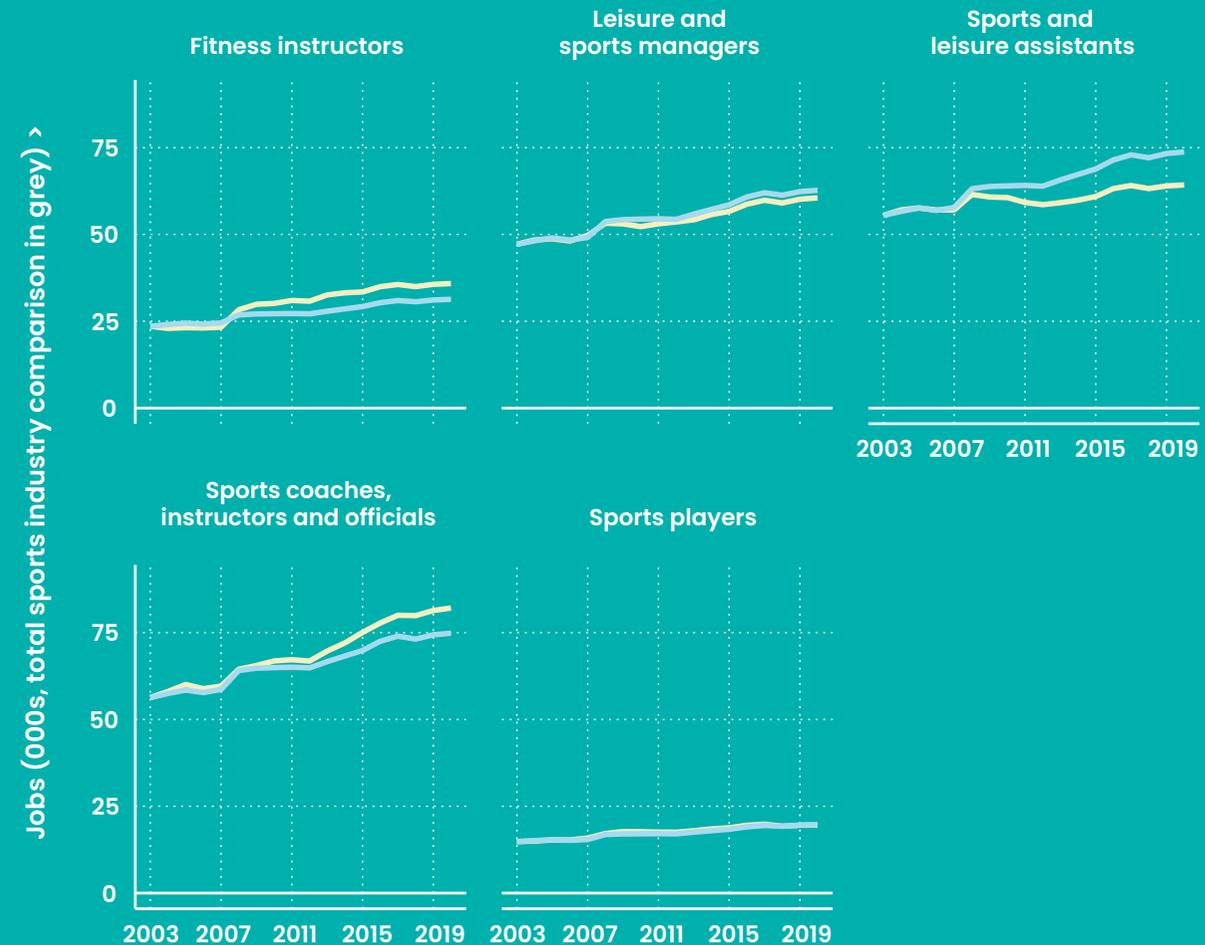
Occupation trends

The sport and physical activity professionals labour market – defined by occupations rather than the industries they work within – has grown slightly more slowly than industries, at 1.7 per cent per annum from 2003 to 2020, adding 65,000 net new jobs. Fastest growth by some distance has been among fitness instructors – and note, this analysis does not include freelancers – adding 12,000 jobs, for a growth rate of 2.5 per cent per annum. Next fastest are sports coaches, adding the most in terms of new jobs (26,000), and increasing by 2.2 per cent per annum from 2003 to 2020.

Sports and leisure assistants are slowest growing, adding 9,000 jobs to a relatively high base, requiring annualised growth of 0.9 per cent, while sports players have added fewer jobs (4,800) but maintained a 1.6 per cent per annum growth rate, keeping pace with the occupational labour market.

Coaches and instructors fastest-growing

All roles growing: leisure assistants still added 9,000



Data: Emsi 2020.1

Employment type trends

Returning to the different categories we explored in the map of the current labour market in the previous chapter, we can have a look where jobs have been added and how fast that growth represents. We choose here the period since the end of the past recession, 2010 to 2019, reflecting that this is when decisive shifts in employment types have been occurring across the labour market.

Freelance roles have dominated growth whether measured by roles added (top chart, 29,600 roles added 2010-2019) or the rate of growth (bottom chart, 67 per cent increase 2010-2019).

Freelance roles dominate growth.

Reflecting their higher base, professionals within the industry and non-professional

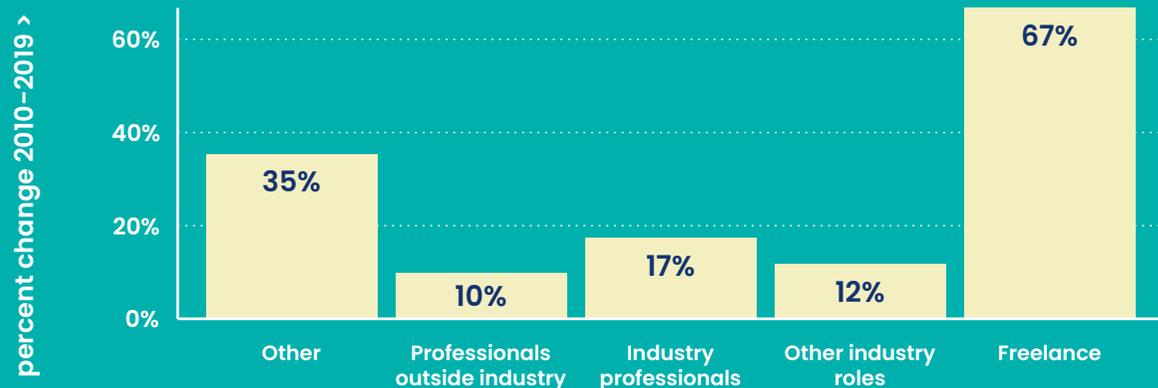
roles within the sport and physical activity industry added similar numbers of jobs (25,100 and 26,000, respectively) but with slower growth (17 and 12 per cent respectively). Professionals outside the industry saw moderate growth; 'other' roles, including for example full-time volunteers, have increased significantly but their low base means the number of roles added is relatively small.

Freelance job growth driving the industry

Sports jobs added by type



Sports jobs growth by type



Data: Emsi 2020.1 and analysis of ONS Annual Population Survey via Nomis

Recruitment trend

We turn now to what we can learn by tracking the advertisements posted by employers to online job boards. We use this data – which is intensively de-duplicated and processed – because of its unrivalled richness, and its insights into the frontiers of labour market demand, but it is relatively noisy, and so the overall quantity matters less than the trends and composition of the data.

Overall, the trend suggests a sustained increase in recruitment demand across the period for which the data are available, since the start of January 2016, with posting levels near-doubling over those four years – typically now there are around 15,000 active job postings seeking sport and physical activity professional talents in any one month.²

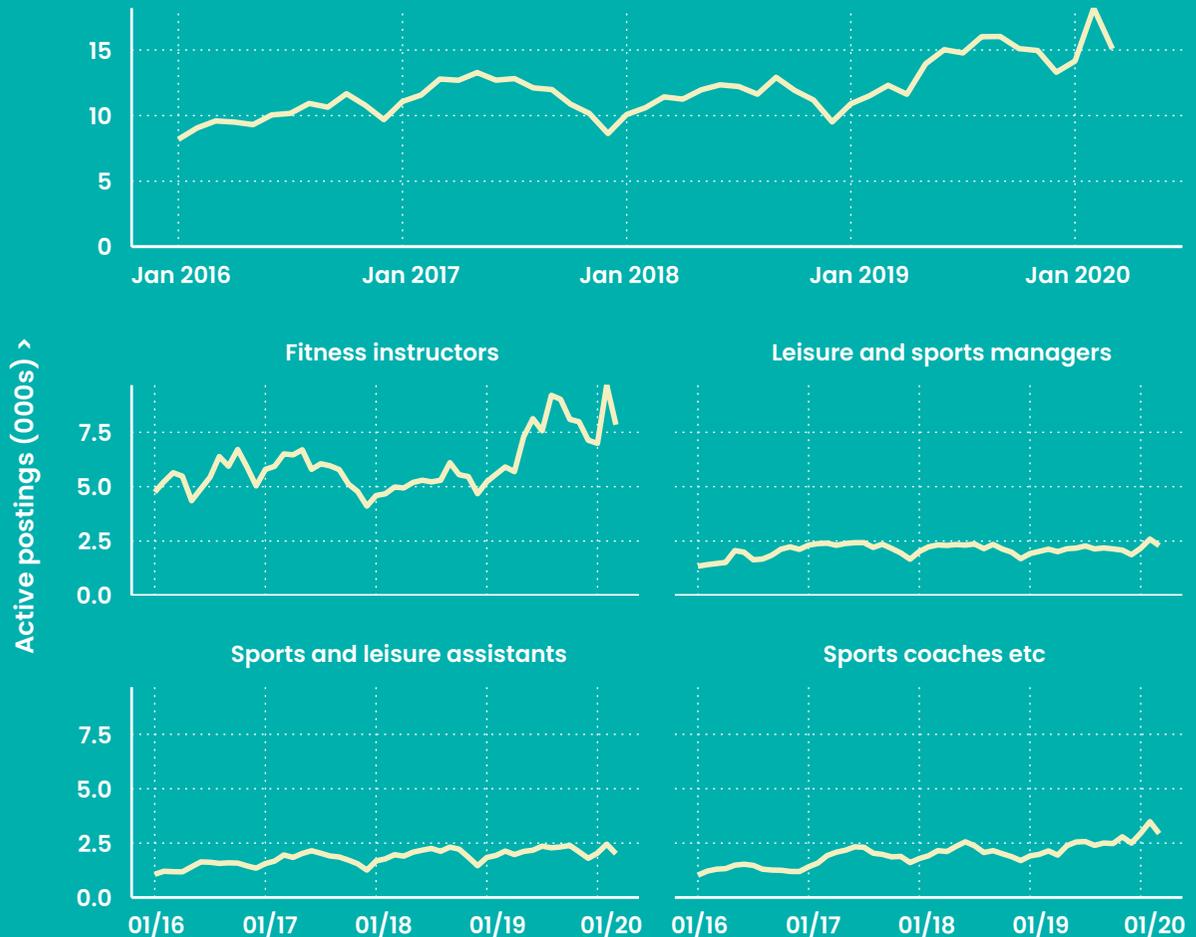
Looking at individual occupations³, we can see that most of the shift in job posting volumes have been driven by the fast growth in fitness instructors. Sports coaches, instructors and officials have seen the fastest relative increase – almost tripling since 2016. In both cases, recruitment trends magnify the underlying trends in jobs growth already observed for these occupations.

² 'Active' means that the posting may appear before the month, but is still advertised during the month.

³ Note, there are no postings for sports players, reflecting the nature of the labour market.

Recruitment activity doubling over 4 years

Monthly active postings excluding standing postings



Data: Emsi Job Posting Analytics

Recruitment volumes

Here we summarise the total database of available job postings data for each of the four occupations,⁴ to identify the basis for this analysis of recruitment trends and give some high level metrics for context.

First, *postings* are unique active job postings – de-duplicated, so that every one is unique – across the period under study, from January 2016 to March 2020. There are nearly a quarter of a million unique active postings here. *Companies* records the number of unique employers identified as responsible for those job postings – so e.g. each company posting fitness instructors generated a mean average 13 unique postings.

Intensity and *duration* are two indicators of posting activity. Intensity measures the ratio between the number of instances a job posting appeared online and the number of unique postings they account for – more duplication implies greater aggression in recruitment, and so e.g. fitness instructors are most aggressively recruited. Duration is the median number of days a posting is live online for – again, fitness instructor postings are left for 32 days, compared to 27 or 28 for the others, suggesting it is somewhat harder to find wanted talent.

⁴ Again note, there are no postings for sports players, reflecting the nature of the labour market.

Unique postings	Unique companies	Posting intensity	Posting duration	Median salary	
122,892	9,304	3.77	32	25,056	Fitness instructors
45,302	9,947	2.95	27	26,080	Leisure and sports managers
39,711	6,821	2.95	27	17,120	Sports and leisure assistants
41,455	8,632	2.71	28	20,832	Sports coaches, instructors and officials
249,360	29,006	3.31	29	21,600	TOTAL

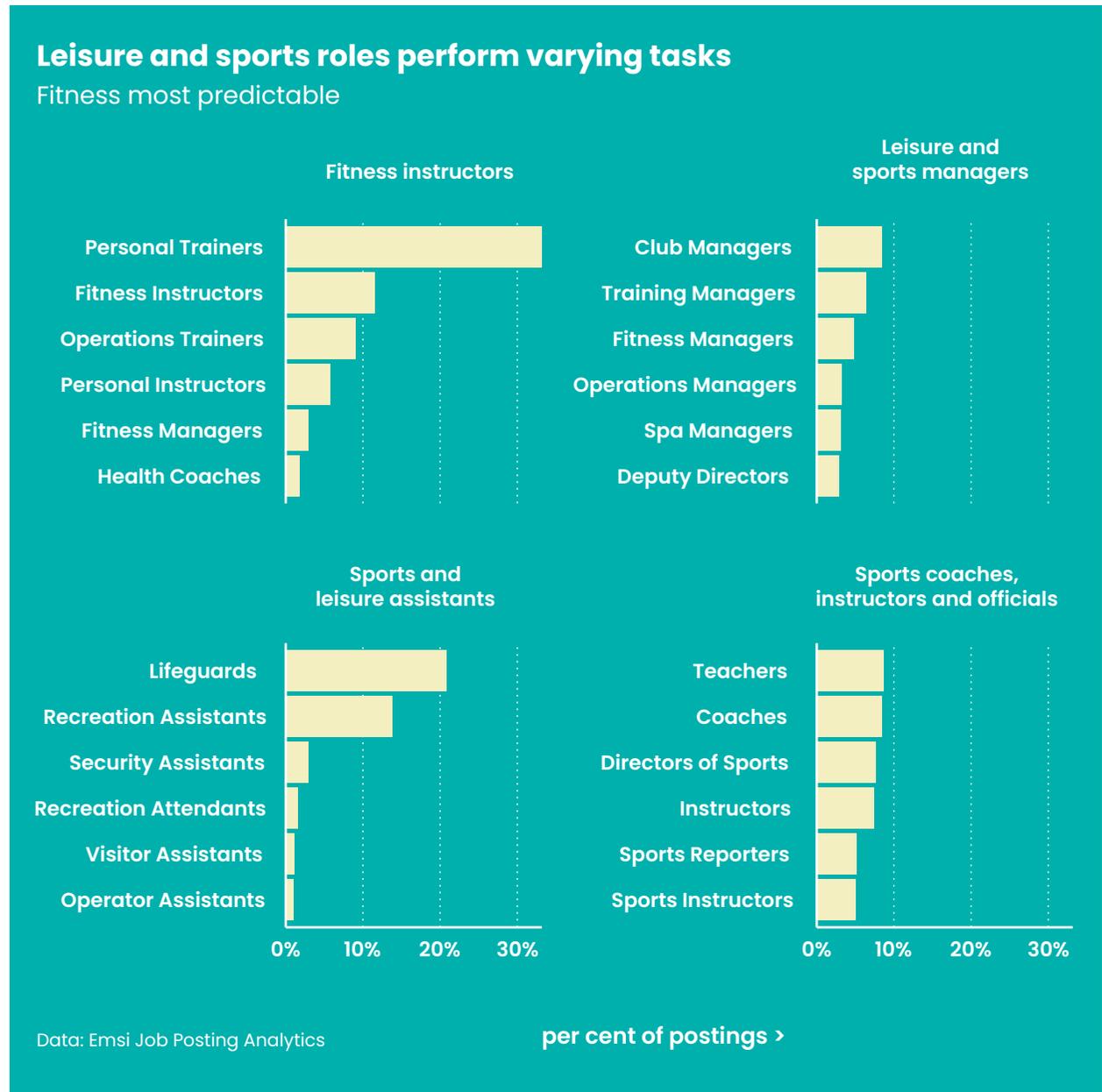
Data: Emsi Job Posting Analytics

Job titles in demand

While all of the job postings data are classified to the ONS SOC taxonomy, they are further processed to look at individual job title categories, which can give insights into the variations of the occupation that are in highest demand, we do this here for each occupation (chart, right).

Fitness instructors have the single clearest pattern: personal trainers account for a third of fitness instructor roles, rising to half when combined with fitness instructor titles. For the others, the pattern is much more diverse. So for example, sports and leisure assistants include a fifth as lifeguards, 12 per cent as recreation assistants, with security and other recreation roles also featuring – explaining their role across a wider range of industries.

Leisure and sports manager roles are similarly diverse, with some – e.g. fitness managers – clearly in the sports environment, while others – e.g. club managers – more ambiguously so. For sports coaches, instructors and officials, the pattern is more strongly sport-oriented, but includes teachers, coaches, instructors as well as sports reporters.



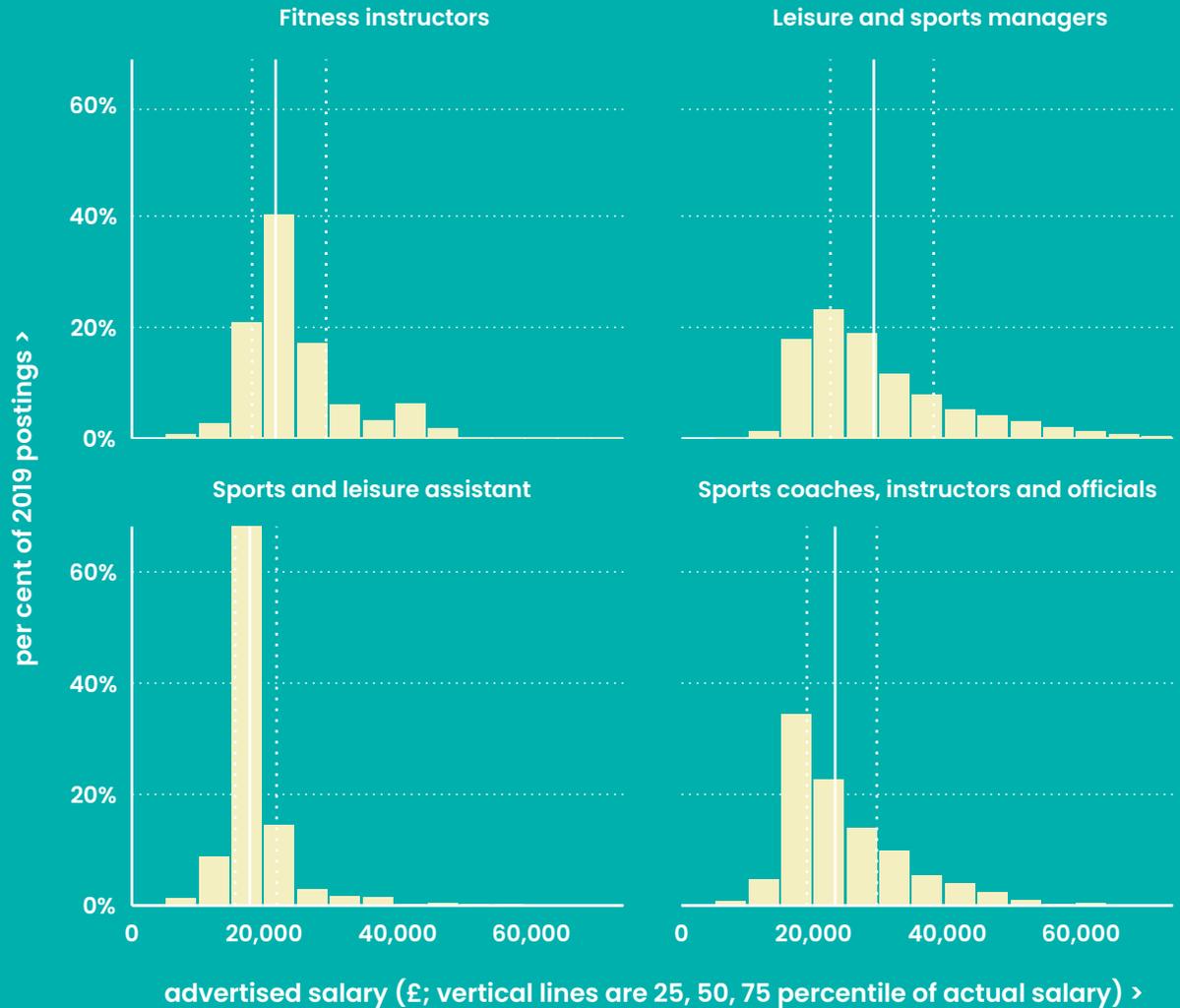
Pay trends

Looking at pay we can use both job postings data and official labour market intelligence as complements; they do different things. Advertised salaries from job postings can give us detailed distributional data (the green bars in the charts, right) which tell us about the pattern of salaries employers seek to offer to attract needed talent; labour market intelligence data tells us the salaries which are typically paid (quartiles and medians in the vertical lines).

Advertised and actual salaries are in closest alignment for fitness instructors – given the recruitment data, a relatively fast-moving labour market – and sports and leisure assistant roles – which has a very high share of early-career workers, likely with limited tenure. Differences are largest for sports coaches and leisure and sports managers, where distribution of advertised salary has a long upward tail, and actual salaries are at those levels – this reflects labour markets where experience and progression within jobs add to salaries for advertised posts.

Leisure and sports managers gain most in pay

Assistants lowest, coaches and fitness instructors similar



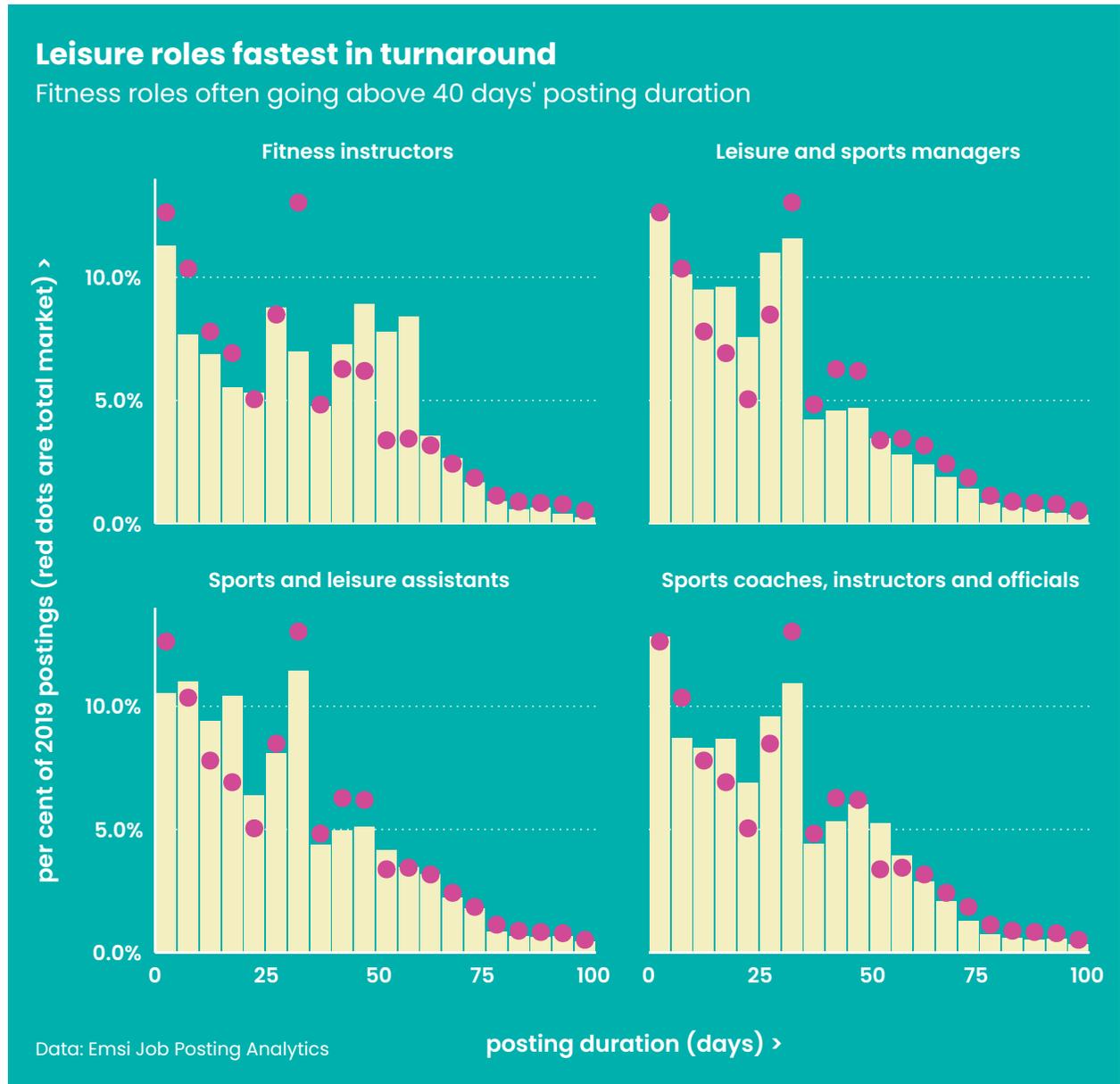
Data: Emsi Job Posting Analytics

Duration analysis

The amount of time job postings are advertised for can be indicative of the difficulties in finding the right talent. 2017 data from the biennial Employer Skills Survey reports skills shortage vacancies⁵ tell us that employers report 12 per cent of leisure and sports manager vacancies, 13 per cent of leisure and sport assistant vacancies, and 20 per cent each of fitness and sports coaches vacancies were hard to fill on account of skills shortages.

Here (chart, right) we look at the distribution of posting duration in days for each occupation, compared to the national trend, where the pink dots indicate the labour market-wide distribution for all job postings. The strongest sign from this analysis is for fitness instructors – reflecting, as we saw earlier, a higher median duration of 32 days, compared to other roles' durations of 27 to 28 days – which has as a significant layer of postings in the 40 to 60 day range, above that typically seen in the labour market. That suggests that some of the intensity of recruitment activity in the fitness instructor labour market derives from difficulty in finding the necessary candidates, part of which can relate to questions of the right skills – we return to the question for which skills are decisive in chapter 5.

⁵ Mark Winterbotham et al, IFF Research (2018). Employer skills survey 2017. Research Report. London: Department for Education. Occupation-level data accessed via the LMIforall service.



Labour churn

One of the features of fast-growing labour markets like sport and physical activity is often a high level of turnover, with people moving rapidly between new job opportunities. While this can be beneficial –new demands require rapid adjustment of supply to meet demand – there are significant implications in terms of cost and disruption in the workplace. Questions have been raised about the implications for labour market efficiency in the sector.

The first step in analysing the problem is to evaluate labour market turnover for sport and physical activity occupations. Here we use an implicit measure: the ratio of online job postings to jobs averaged over the period 2016 to 2019, with each occupation compared to a set of industry-based groups of occupations. There are potential biases here, as different groups are more or less likely to advertise online (the least likely, agriculture, is not featured) and also we plot job growth on the x-axis as this will likely promote turnover. We can see that except fitness instructors, the other three occupations are not particularly high-turnover relative to their growth level – but fitness instructors have more than 2 job postings per job, suggesting very rapid turnover.

Fitness instructors have high labour churn

Other professional occupations in line with wider labour market



Data: Emsi 2020.1 and Job Posting Analytics

Estimating costs

To estimate the implied costs of turnover for the sport and physical activity labour market for 2019, we model using the following assumptions:⁶

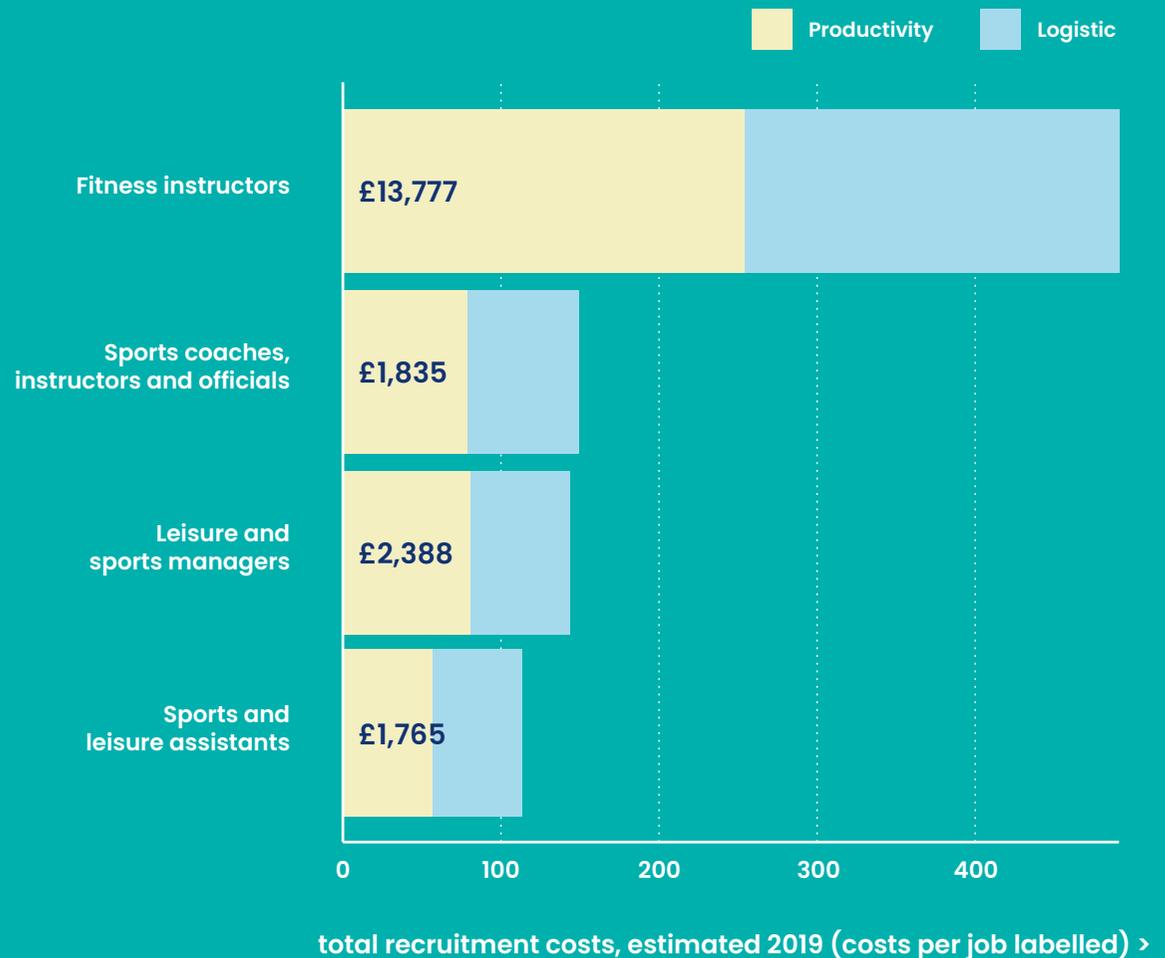
- The **productivity cost** of inducting new employees and bringing them up to full performance, is estimated per job posting at 20 weeks at two-thirds of the advertised salary.
- The **logistical cost** of advertising and finding employees is modelled as the number of calendar days postings are online multiplied by the advertised salary – a fixed administrative cost of £3,000 per posting is added.

An additional penalty is applied, raising the logistical cost by 50 per cent for the share of vacancies characterised by skills shortages. The results are as shown: £470 million in lost productivity, £426 million in logistical cost. The majority (£491 million) of these costs are attributed to fitness instructors – the high turnover in this occupation means that £13,777 in recruitment cost is added for every employed job.

⁶ Assumptions have been informed by Oxford Economics (2014) The cost of brain drain: understanding the financial impact of staff turnover. Oxford Economics/Unum.

£897m estimated cost in recruitment

Recruitment turnover costs £13,777 for every employed fitness instructor job



Data: Emsi analysis using Job Posting Analytics, ESS 2017, Oxford Economics (2014)



 **CIMSPA**

Local presence

Local presence

What we call 'the labour market' is in practice a set of distinct regional labour markets, each with their own dynamics of supply and demand, driven by economics and social trends much wider than any one industry. Understanding the sport and physical activity labour market therefore requires an investigation of how it has developed in different parts of the UK.

Regional variation

Industries grow in clusters depending on the interactions of place with patterns of supply and demand. For that reason, understanding how the rapid growth of sport and physical activity industries has been distributed across Britain becomes important to understand how skills needs might vary by region.

Across the UK's regions and countries, the East of England has seen the fastest growth in the professional labour market, adding 10,800 jobs since 2010, growth of 49 per cent – and primarily driven by growth in freelance demand. Only one English region – the North East – saw a decline in job numbers, but this was more than balanced out by growth in freelance roles.

Widely distributed

Looking in more detail, one of the distinctive points about sport and physical activity industries is their relative presence across most of the country: no

area has no jobs in sport and physical activity industries, and concentrations in the industry are spread out, often outside of the major urban centres – in the East of England, the North East and the

South West. The most prominent urban centre is Liverpool, which has 50 per cent more jobs in sport and physical activity industries than the national trend would suggest; because of its size, London has many jobs, but comparatively fewer than the national trend would suggest.

Reflecting its role as the largest job creator, it's the operation of sports facilities which has driven some substantial swings in job concentrations between areas – adding them in places like Bournemouth or Taunton, and taking them away in Doncaster or Colwyn Bay. Recruitment also varies geographically along with the underlying job trends, with rapid growth in postings from 2018 to 2019 in London, but rapid growth in advertised salaries in the East Midlands and South West.

In this chapter we explore regional variation at different levels of granularity and with several different measures.

Regional professional demand

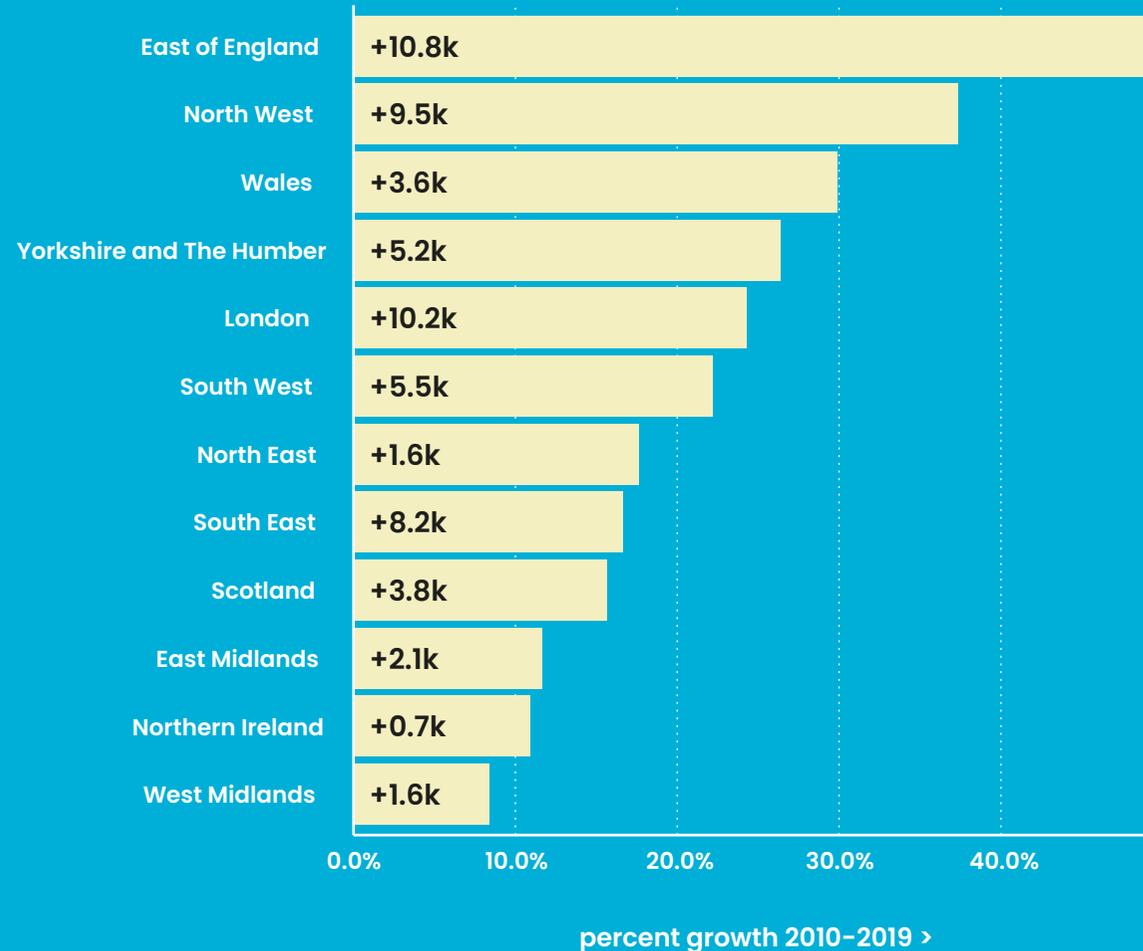
Looking at the broad level of nine English regions along with Northern Ireland, Scotland and Wales, we can see that demand for sport and physical activity work has seen robust growth in the past decade across all parts of the UK. This analysis looks at the five sport and physical activity occupations, and combines both job numbers and freelancer roles, to build on the analysis of the total labour market earlier in this report.

Leading the pack in terms of the pace of growth is the East of England, growing by 49 per cent and adding 10,800 roles from 2010 to 2019 – outpacing even London and the South East, the most populous regions, in terms of the creation of new roles. Slower paced growth was seen in Northern Ireland (10 per cent) and the West Midlands (8 per cent) –but it is worth noting that even then, growth is positive, reflecting the robust growth trends driving sport and physical activity.

Demand for sport and physical activity work has seen robust growth in the past decade across all parts of the UK.

Net growth across all regions

East of England, North West and Wales growing fastest



Data: Emsi 2020.1 and analysis of ONS Annual Population Survey via Nomis

Local labour markets

While these dozen broad regions provide a good initial standpoint, the maps on the following pages use a more granular geography, to understand the industry in the context of specific local labour markets.

Specifically, these map labour market indicators for the industry to 180 groupings of local authorities aligned with the ONS' Travel to Work Area geography— designed to reflect commuting geographies where the maximum possible number live and work in the same area, and so it becomes more reflective of a functional economy.¹



To explore the industry in each local labour market we use four measures:

Jobs

The straightforward measure of how many roles are employed by sport and physical activity businesses. Unsurprisingly, this highlights London.

Job density

This measures the number of jobs relative to each 100,000 of resident population, which highlights the higher profile of the industry in less urban locations.

Location Quotient (LQ)

A measure from economic geography which takes the ratio of an industry's share of local employment with the same industry's share in national employment, such that a relative regional concentration appears where the location quotient is above 1, and is normally taken to be significant above 1.2²

Jobs growth

Defined here as the net change in jobs from 2010 to 2019, measured as a percentage of jobs in 2010; from the previous chapter we know that across the UK, industry jobs have grown by 17 per cent over this period, so this represents the benchmark for comparison.

¹ The share of workers living and working within the region ranges from 58 per cent to 97 per cent. Details of these Travel to Work Area geographies are further elaborated in Appendix B.

² Formally, for employment e in industry j in location i , location quotient is $(e_{ij}/e_i)/(\sum_j e_{ij}/\sum_j e_i)$.

Job density and LQ are static measures of concentration, while job growth measures how this is changing over time. As can be seen from the maps, one of the most striking features in terms of current distribution is the spread of concentrations across the country – with the largest concentrations including the Thetford and Mildenhall area in the East of England (covering Newmarket), Malton in North Yorkshire and Taunton in the South West. In terms of major urban centres, the leading cities are Doncaster and Liverpool, with location quotients of 1.49 and 1.5 respectively.

It's important to note that LQ is a relative measure, and the number of jobs varies greatly according to both the LQ and the size of the regional economy – and so the largest region by job number is London, with 50,200 jobs but an LQ of 0.76. One striking feature, reflecting the fact that sport and physical activity demand is domestically generated from household consumption and that physical presence is required for delivery, is its presence in all parts of the country – even the lowest presence of sport and physical activity jobs, in Enniskillen in Northern Ireland, there are estimated to be 300 industry jobs, about 70 per cent fewer than the national pattern would suggest.

Growth hotspots

Again, with growth, the striking feature is the distribution away from urban centres: fastest growing for industry jobs across the board was Bournemouth, adding 1,800 jobs (146 per cent growth), followed by Buxton, adding 300 jobs (132 per cent growth). Liverpool is the fastest growing major urban centre, adding 4,000 jobs (79 per cent growth), with Exeter next, adding 1,600 jobs (64 per cent growth). Again, growth is relative and London has added the most jobs, 9,600 jobs, representing 24 per cent growth from its higher base.

79%
job growth in Liverpool

Industry hotspots

Looking at the level of each industry (following page), the results become more varied, but again the pattern of a wide spread across the country generally continues:

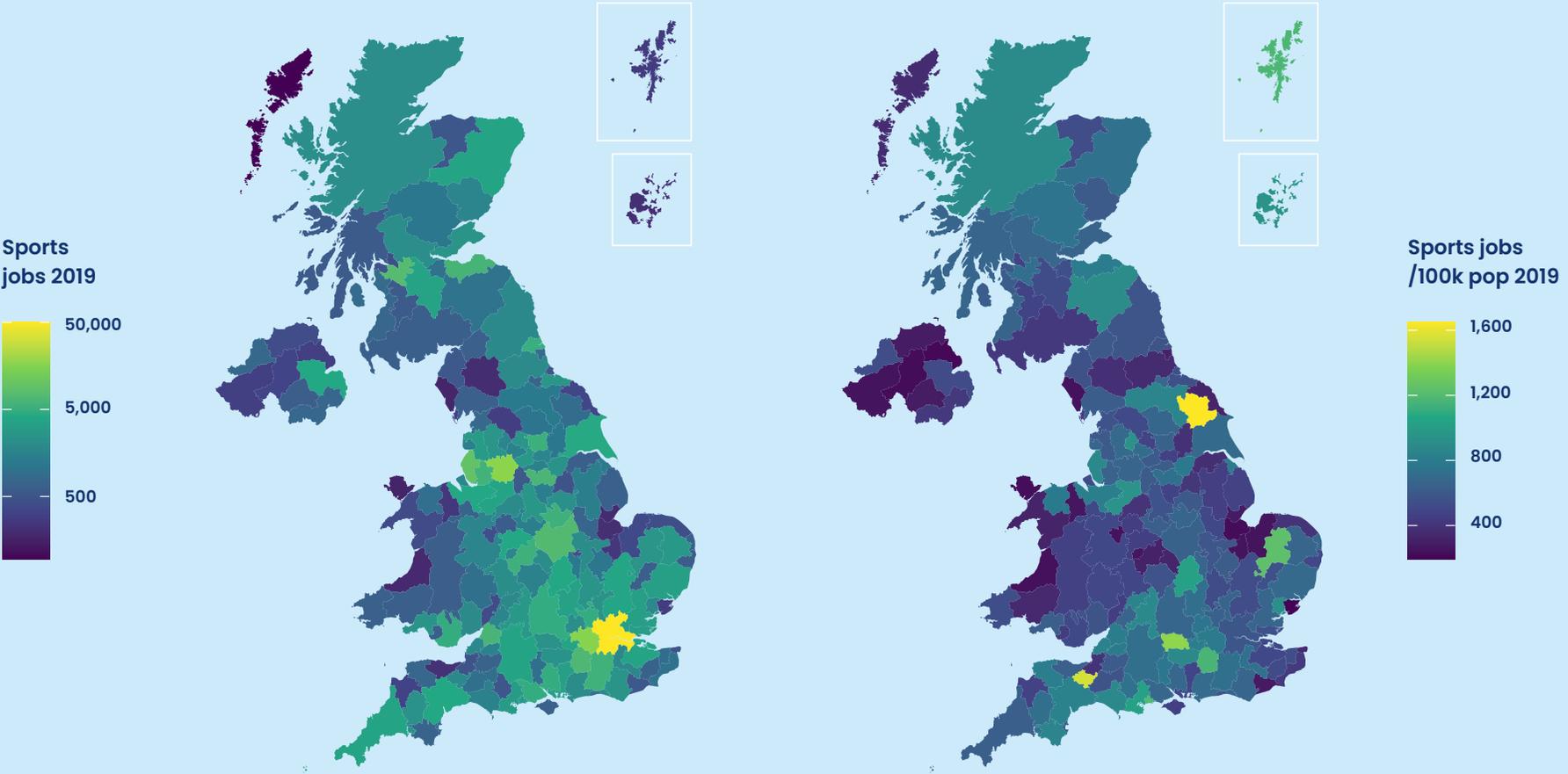
- For activities of sports clubs, Burnley has the greatest concentration (LQ 2.53) and fastest jobs growth (287 per cent), with Bournemouth second for concentration (LQ 2.27) and Omagh and Strabane second for growth (226 per cent).
- For fitness facilities, two Scottish regions lead concentrations – Galashiels and Peebles (LQ 3.67) and Livingston (LQ 2.7) while growth is led by Mansfield (182 per cent) and Leeds (170 per cent).

- For the operation of sports facilities, Taunton leads concentrations (LQ 4.04) with Shetland and Orkney Islands second and third;³ for growth, Bournemouth leads (387 per cent), then Middlesbrough and Stockton (303 per cent) and Liverpool (222 per cent).
- For sports and recreation education, Thetford and Mildenhall leads concentrations (LQ 7.84) while Leicester has grown fastest (493 per cent), followed by Bristol (478 per cent) and Manchester (239 per cent).
- For other sports activities, Thetford and Mildenhall dominates with 1,400 jobs (LQ 14.54), and Malton (LQ 10.9) second. For growth, Chester has raced ahead with 776 per cent growth.

³ This partly is likely to reflect minimum operating scale within small labour markets.

Sports industry jobs across the UK

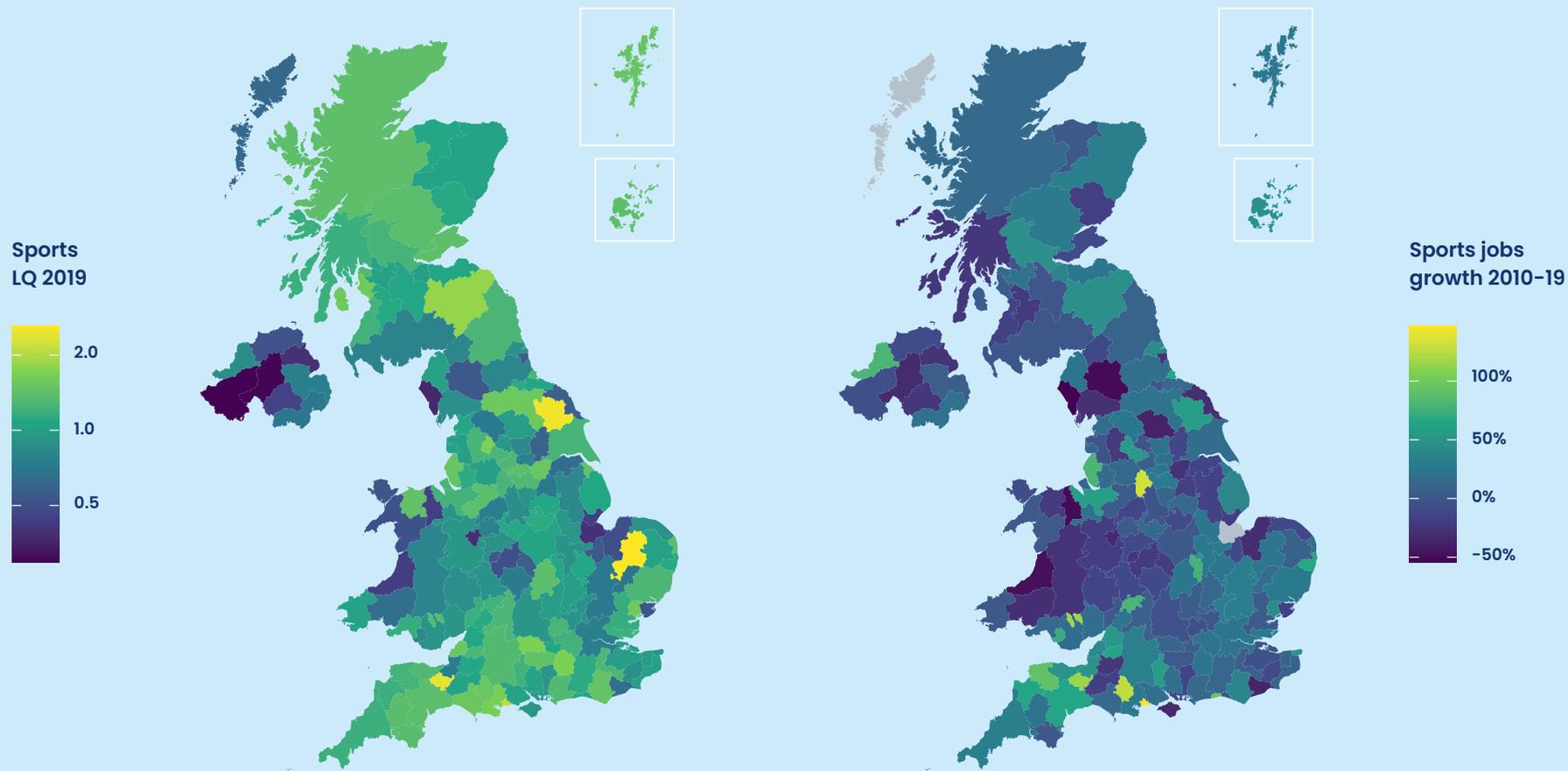
Largest job numbers in London - wide range of areas by density



Data: Emsi 2020.1; only areas with 50+ jobs estimated 2019

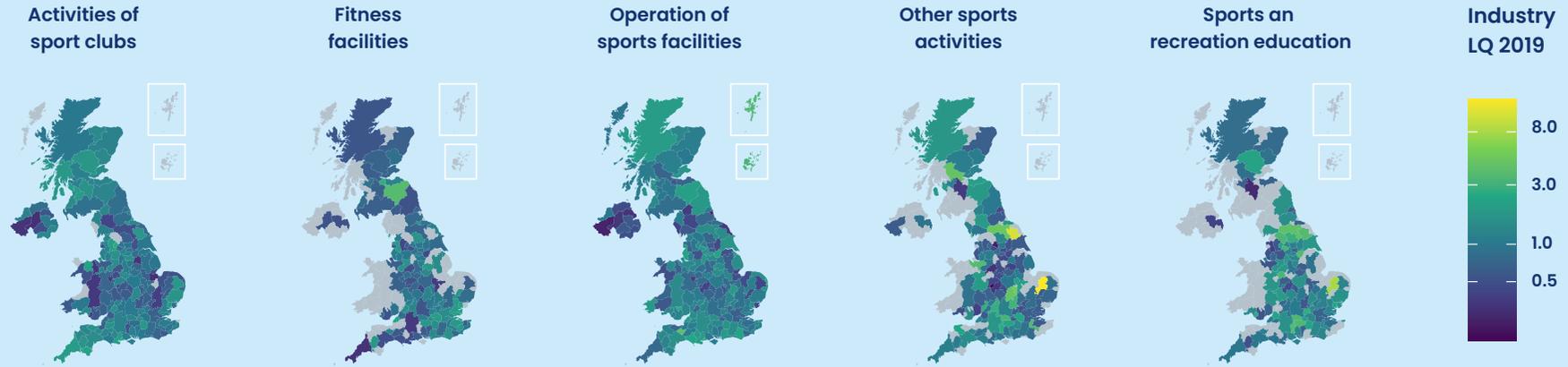
Sports industry hotspots: jobs and growth across the UK

Largest concentrations in East Anglia and the North East

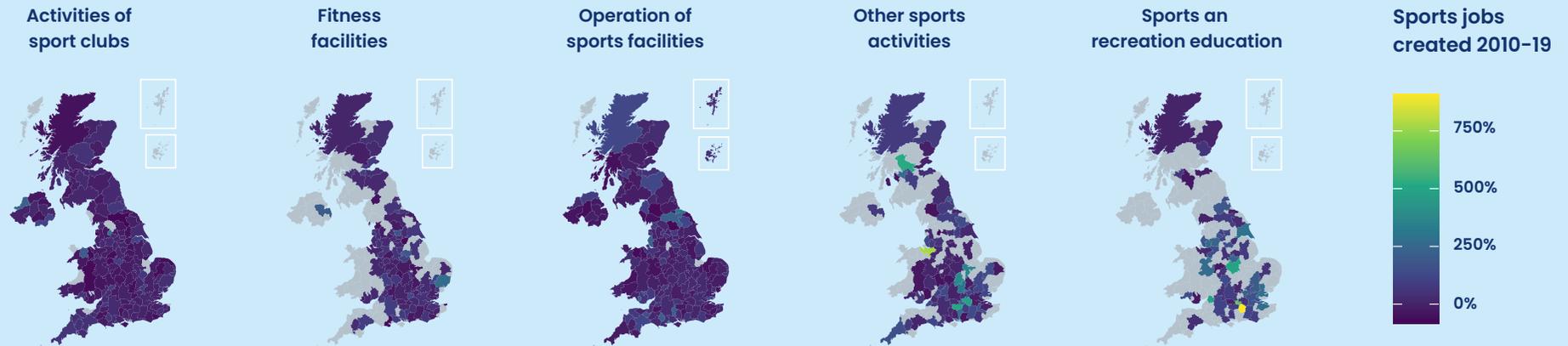


Data: Emsi 2020.1; only areas with 50+ jobs estimated 2019

Job concentrations: Education and other sports much more focused



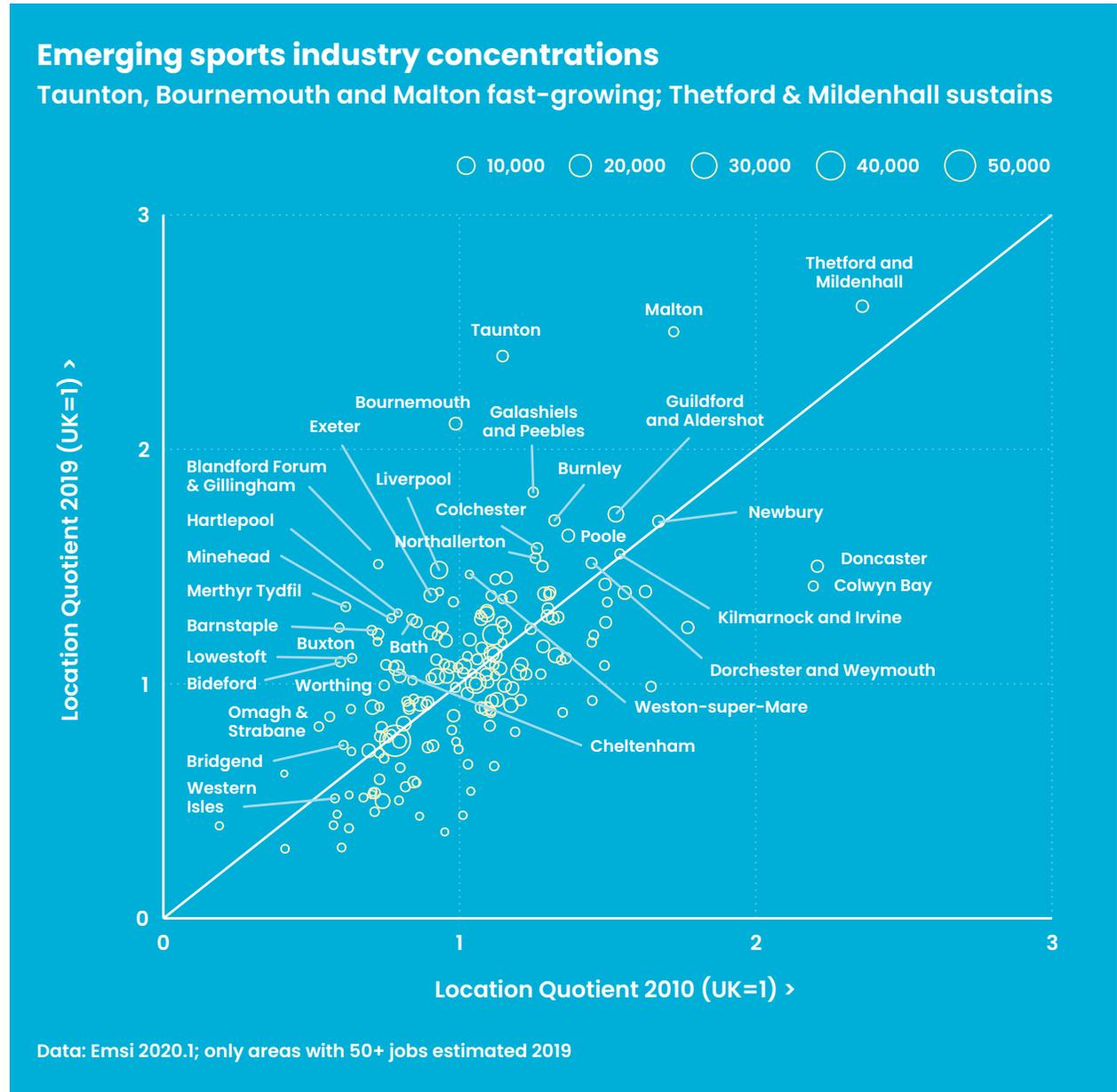
Job growth: Sports facilities concentrated in London



Data: Emsi 2020.1; only areas with 20+ jobs estimated 2019

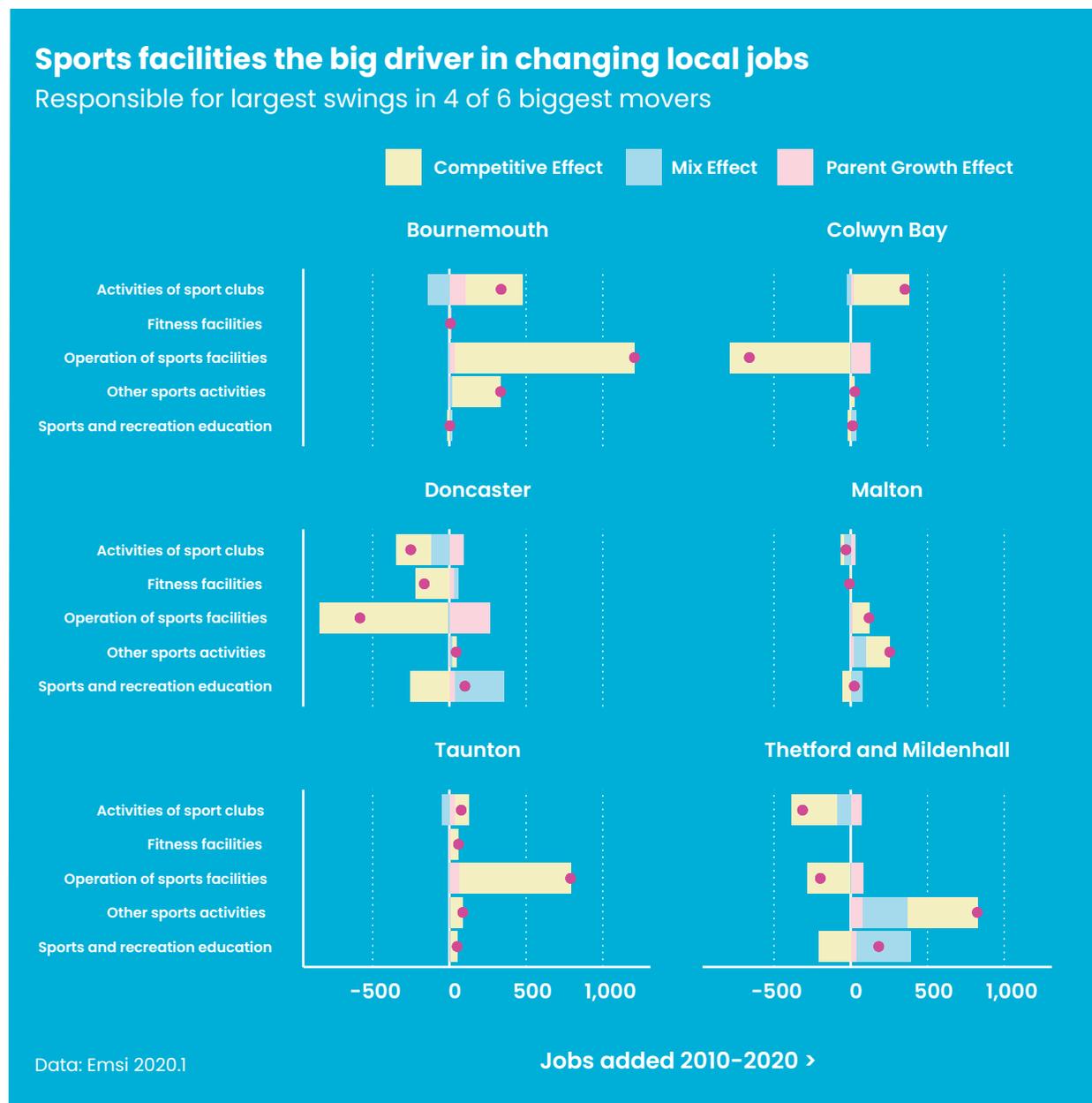
Emerging concentrations

We can also look at the shift of Location Quotients over time, to see how concentrations have shifted between 2010 and 2019 (chart, right); the diagonal line represents a stable position between the two years, with regions above the line reaching a higher concentration and vice versa. Here we can see that Thetford and Mildenhall's leading position has been overall stable over time, while e.g. Taunton, Malton and Bournemouth have seen significant upward moves in their Location Quotient.



At the same time, Doncaster and Colwyn Bay has seen a decline. Bournemouth is an interesting case, as it has moved from an LQ of 0.99 to 2.11 – from having no relative concentration to having a very clear one. We can explore these fastest movers further through a *shift-share analysis* which breaks down the change in jobs over time into three categories: ‘parent growth effect’ which simply reflects the national job trend; ‘mix effect’ which accounts for the initial concentration of jobs in the specified industries, and the residual ‘competitive effect’ which is taken to reflect local factors which make an area more or less competitive and therefore affect jobs growth.

We can see that for all six regions with large swings in Location Quotient, competitive effects provide the largest contributions, with job moves in the operation of sports facilities particularly large for Bournemouth and Taunton (positive) and Doncaster, Colwyn Bay and Thetford and Mildenhall (negative). In the three positive-shifting cases overall – Bournemouth, Malton, Taunton – all industries have been either stable or growing, while in the two negative-shifting cases – Doncaster and Colwyn Bay – the pattern is somewhat more mixed.



Recruitment demands

Returning to the use of online job advertisements posted by employers, we can again bring the data down to the countries and regions, using data for each of the past two full years, 2018 and 2019, and looking at it in terms of unique postings and median advertised salary.

In terms of salary, unsurprisingly the highest median advertised salaries are in London –£25,100 in 2019. The fastest growth between years in advertised salaries was found in the East Midlands (20 per cent) and the South West (19 per cent). Only in the North East (10 per cent) and Northern Ireland (9 per cent) did median advertised salary levels decline. For postings, there was particularly rapid growth in some parts of the country, with the North East and Yorkshire and the Humber (both 39 per cent) leading, followed by the East Midlands (35 per cent) and only the South East seeing a decline (1 per cent).

The maps (next page) show the distribution of these measures across the country, with the highest recorded growth in postings volume in the Scunthorpe region (263 per cent) and the highest advertised salaries in Greenock (median £31,900).

Recruitment demand volumes and advertising salaries rising 2018–2019

South East only region to see a decline

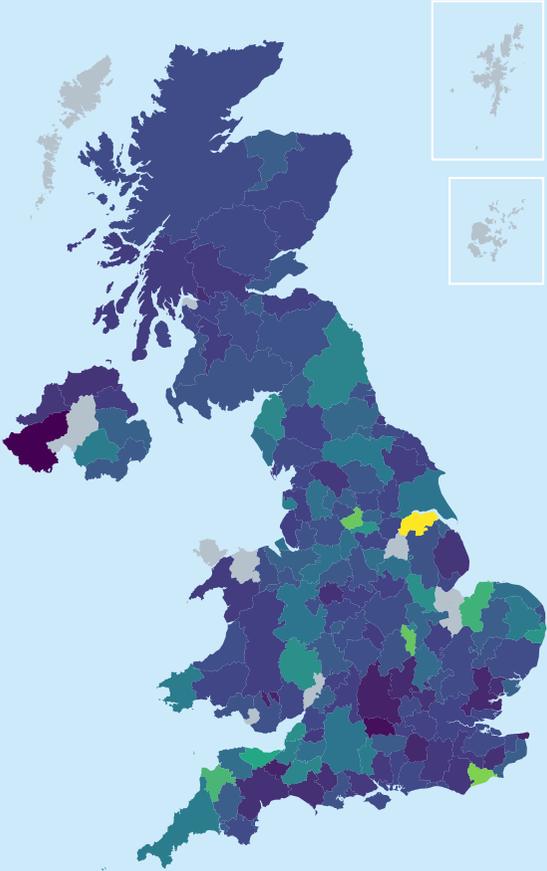
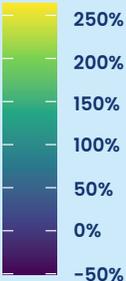


Data: Emsi Job Posting Analytics

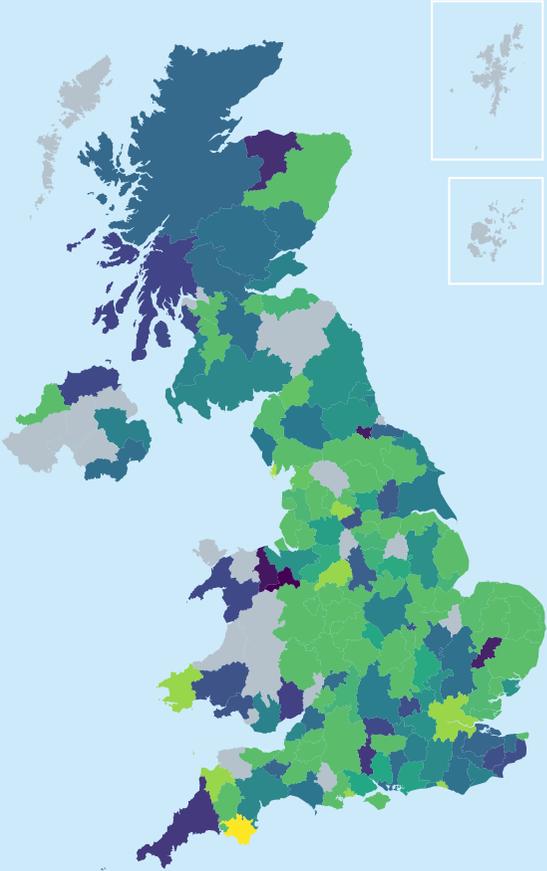
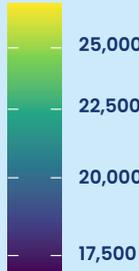
Recruitment is active across the UK

Broad distribution of advertising growth (left) and advertised salaries (right)

Posting growth % 2018-2019



Median advertised % 2018-2019



Data: Emsi Job Posting Analytics; only areas with 30+ job postings

Region and country profiles

Over the following twelve pages, we provide a further 'dashboard' analysis of each of the nine English regions, plus Northern Ireland, Scotland and Wales, each with a standard set of metrics:

Total roles

Describes the number of 'jobs' and 'freelance' roles in 2010 and 2019, in line with the discussions earlier in this report.

Industry shift-share 2010-2019

Reproduces the shift-share analysis used in significant-changing travel to work areas earlier in this chapter for each of the five sport and physical activity industries, which breaks down the change in jobs over time into three categories: 'parent growth effect' which simply reflects the national job trend; 'mix effect' which accounts for the initial concentration of jobs in the specified industries, and the residual 'competitive effect' which is taken to reflect local factors which make an area more or less competitive and therefore affect jobs growth.

Job postings growth by occupation

Shows the change in job postings from 2016 to 2019 as a percentage for the region, with the pink dots indicating the national growth rate in each case.

Median salary by occupation

Uses labour market intelligence on median salaries paid in each region for each occupation,

again with the pink dots indicating the national median salary.

Leading regional skills

Highlights the 8 top skills cited by employers in job postings since 2016 across sport and physical activity occupations, comparing the region with the UK.

The regional dashboards are produced as an addition to the thematic analysis within this chapter, to begin a discussion about the role sport and physical activity plays in regional economies across the UK.

Key observations

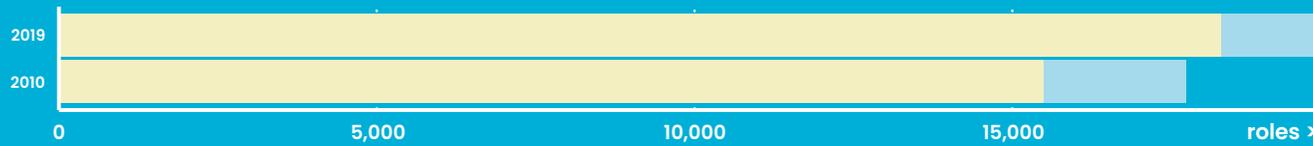
In headline terms, looking across the twelve regions we can observe:

- In common with the analysis at the start of this chapter, all of these regions and countries have seen growth over the past decade, and in most cases it is freelance roles which have grown fastest. The East of England in particular seems to have seen extremely rapid growth in freelance roles over this time.
- The biggest swings in industry jobs come between activities of sports clubs and operation of sports facilities. Some regions show strong growth across most industries – London, North West and South West feature here – while others – for example, South East – have generally seen adverse swings.

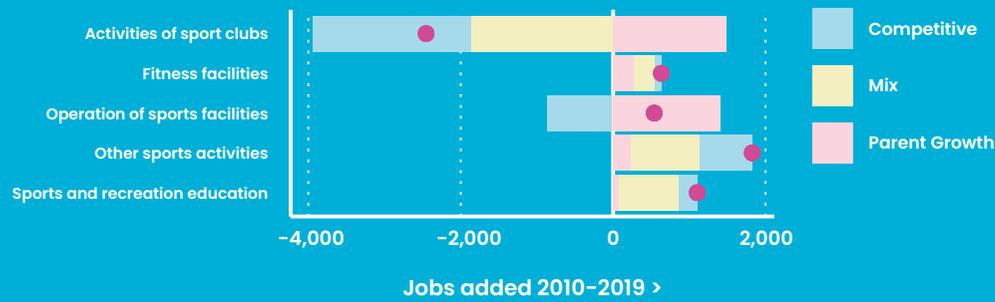
- The large demand for fitness instructors is translating into strongest growth in the East Midlands, East of England, London, North West, Northern Ireland, and West Midlands, with Scotland and the South East seeing the poorest growth.
- Unsurprisingly, salary levels are generally higher in London and the South East, but the East of England scores particularly well here too.
- On skills, the pattern is similar across all regions, with fitness training and instructing skills in the top two in each case, with some small variations. Further down there is more variation, but the same skills typically feature: welfare, sales training, circuit training, physiology and anatomy.

The regional dashboards are produced as an addition to the thematic analysis within this chapter, to begin a discussion about the role sport and physical activity plays in regional economies across the UK.

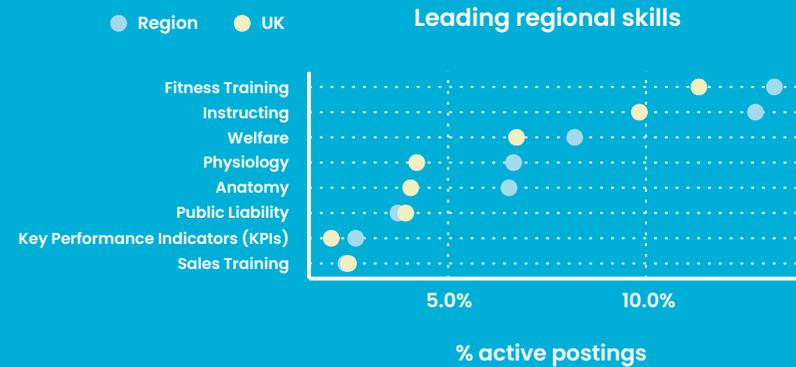
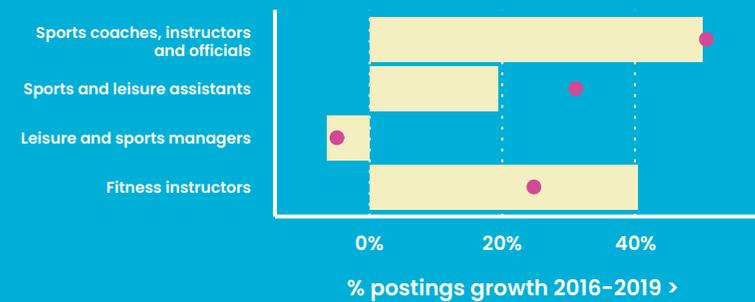
Dashboard: East Midlands



Industry shift-share 2010-2019



Job postings growth by occupation



Data: Emsi 2020.1, analysis of Annual Population Survey, Emsi Job Posting Analytics



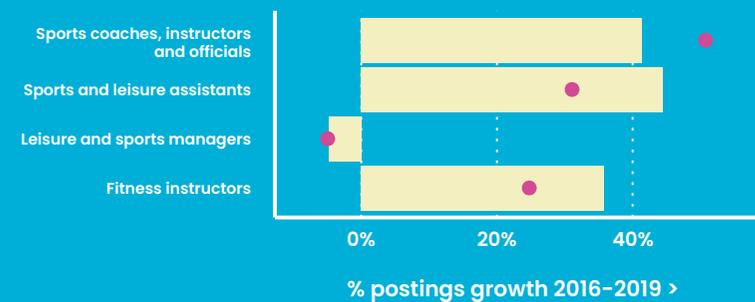
Dashboard: East of England



Industry shift-share 2010-2019



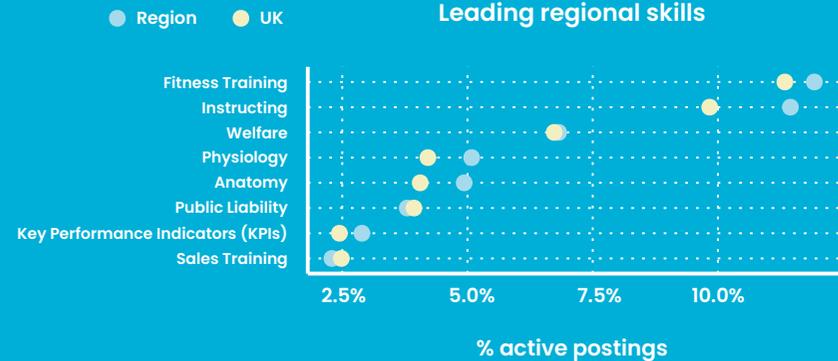
Job postings growth by occupation



Median salary by occupation



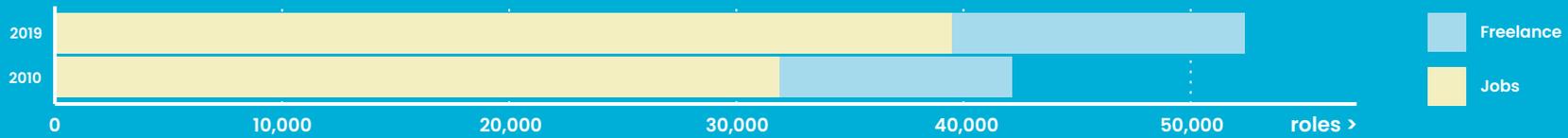
Leading regional skills



Data: Emsi 2020.1, analysis of Annual Population Survey, Emsi Job Posting Analytics



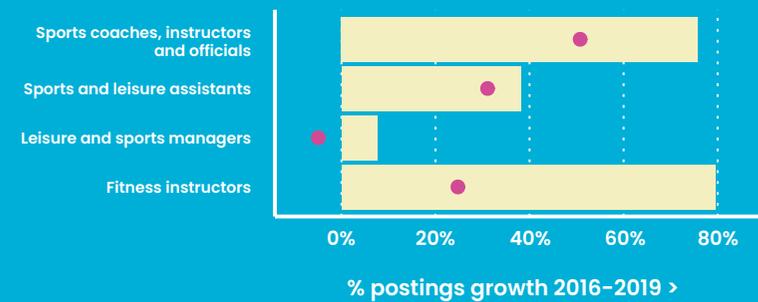
Dashboard: London



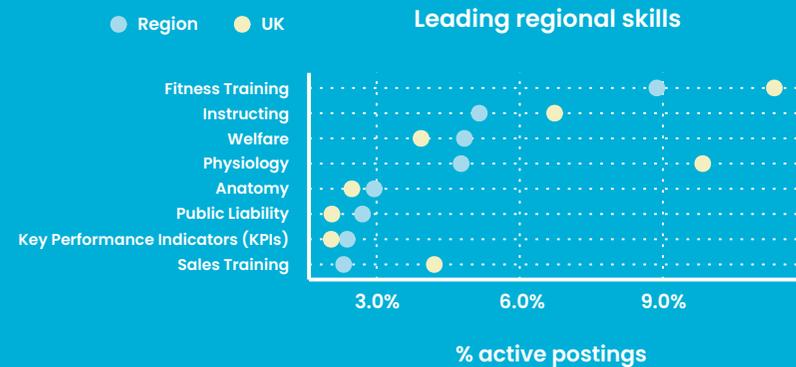
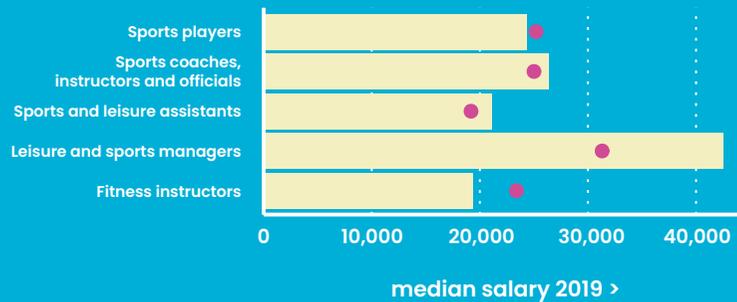
Industry shift-share 2010-2019



Job postings growth by occupation



Median salary by occupation



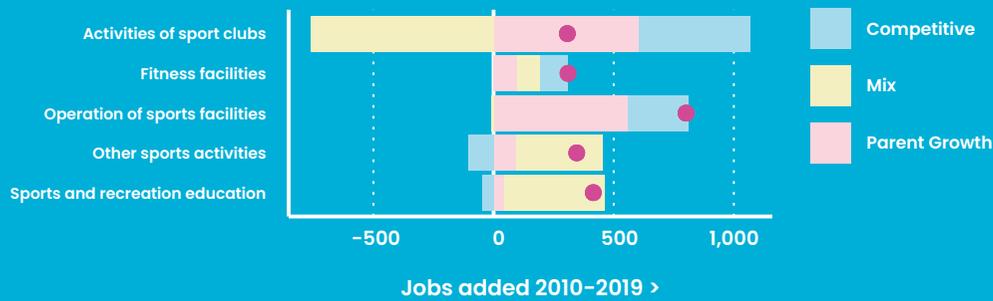
Data: Emsi 2020.1, analysis of Annual Population Survey, Emsi Job Posting Analytics



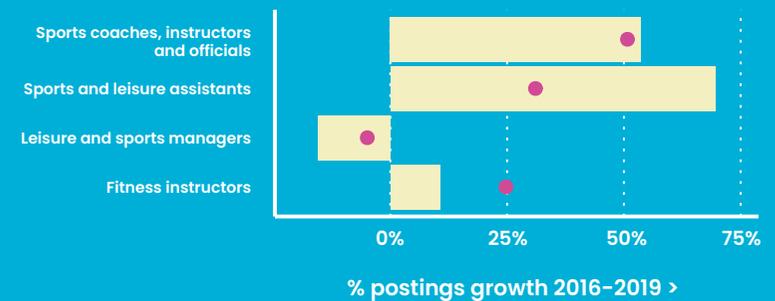
Dashboard: North East



Industry shift-share 2010-2019



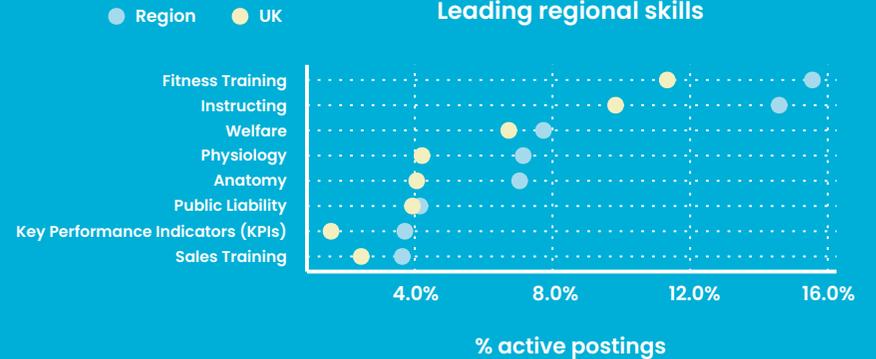
Job postings growth by occupation



Median salary by occupation



Leading regional skills



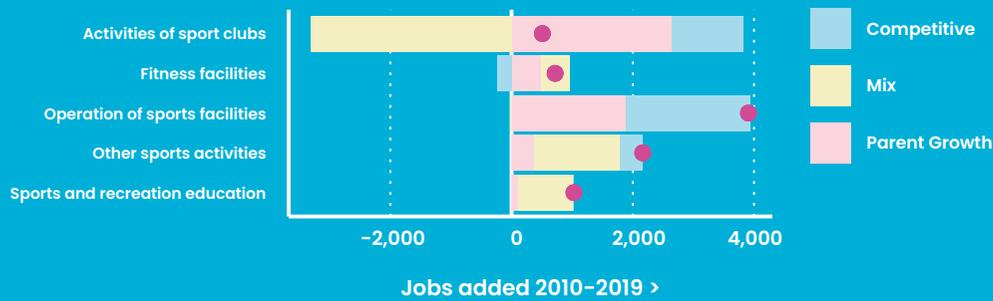
Data: Emsi 2020.1, analysis of Annual Population Survey, Emsi Job Posting Analytics



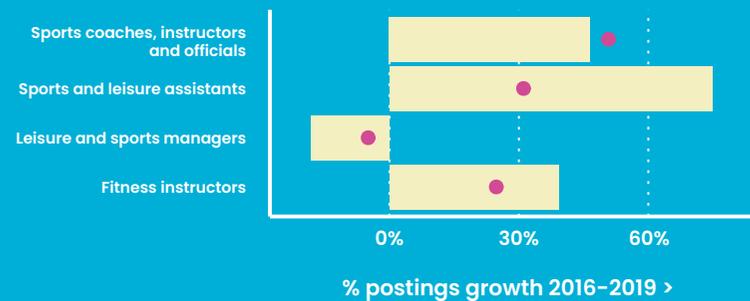
Dashboard: North West



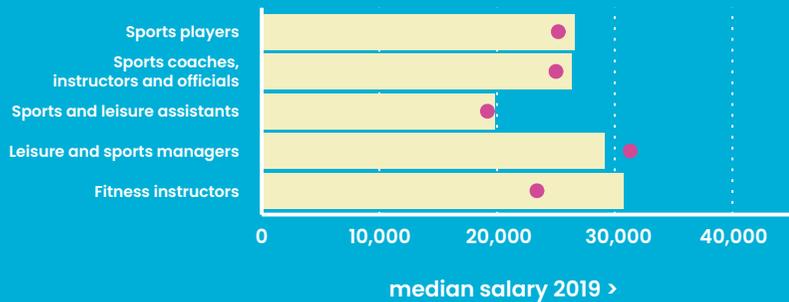
Industry shift-share 2010-2019



Job postings growth by occupation

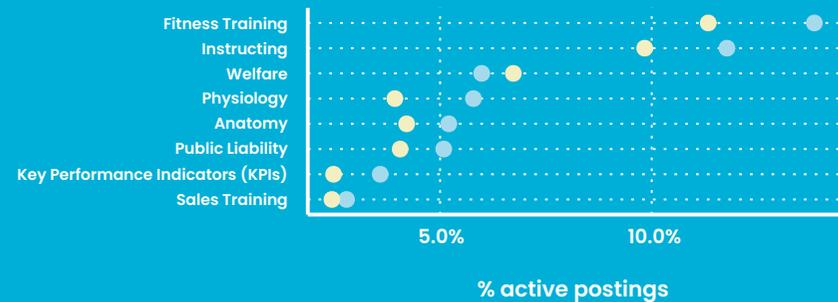


Median salary by occupation



Region UK

Leading regional skills



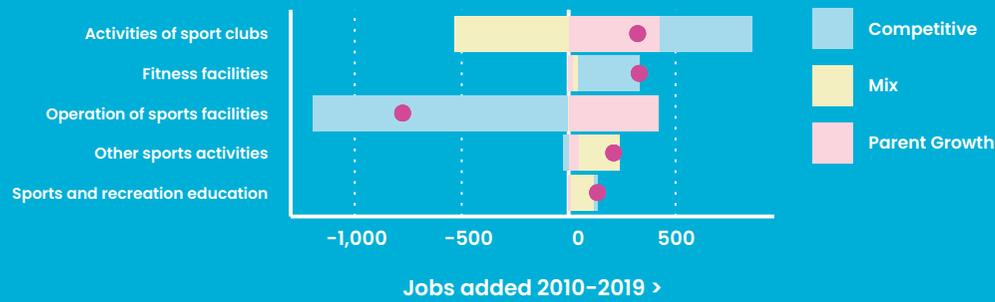
Data: Emsi 2020.1, analysis of Annual Population Survey, Emsi Job Posting Analytics



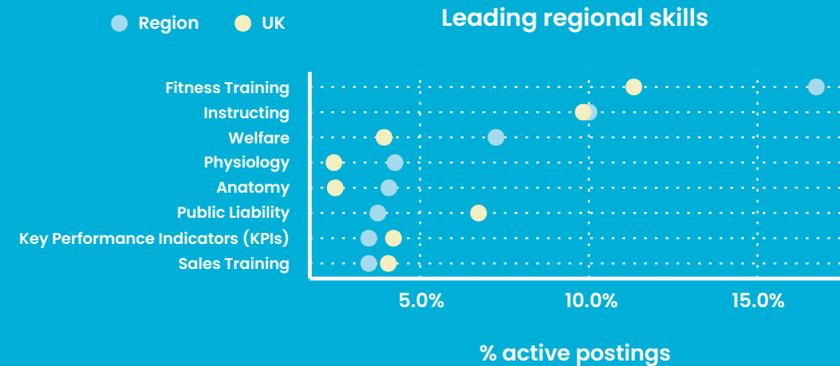
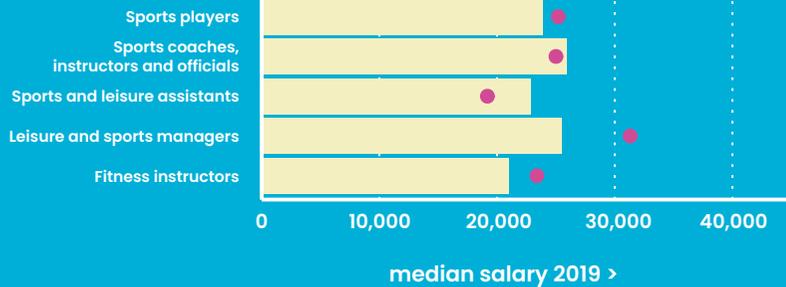
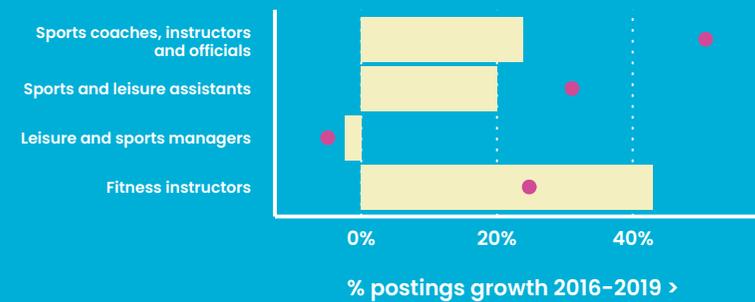
Dashboard: Northern Ireland



Industry shift-share 2010-2019



Job postings growth by occupation



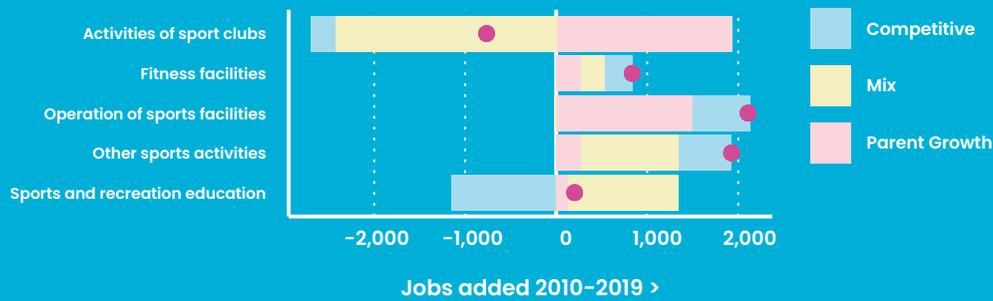
Data: Emsi 2020.1, analysis of Annual Population Survey, Emsi Job Posting Analytics



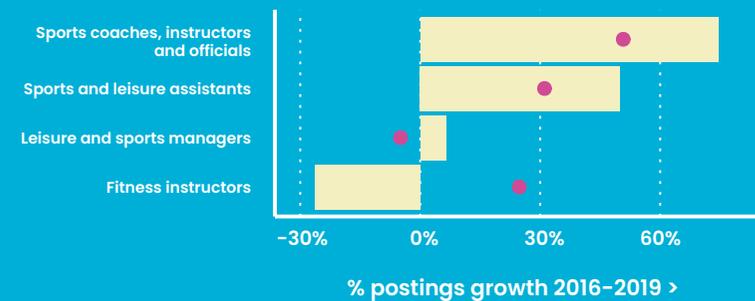
Dashboard: Scotland



Industry shift-share 2010-2019

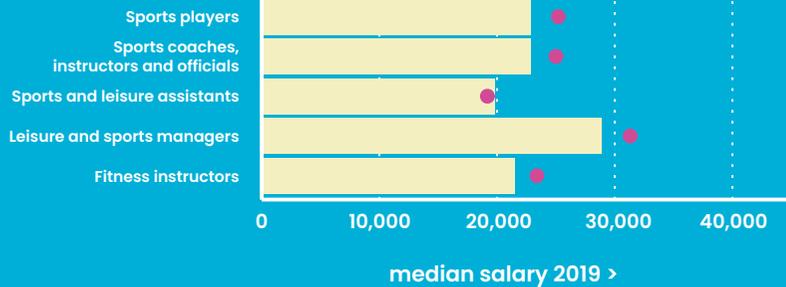


Job postings growth by occupation



Jobs added 2010-2019 >

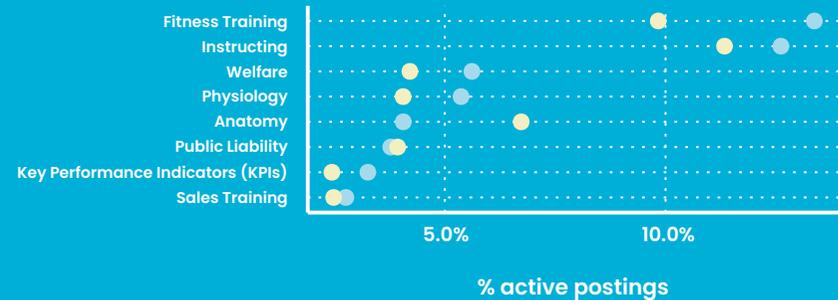
% postings growth 2016-2019 >



median salary 2019 >

● Region ● UK

Leading regional skills

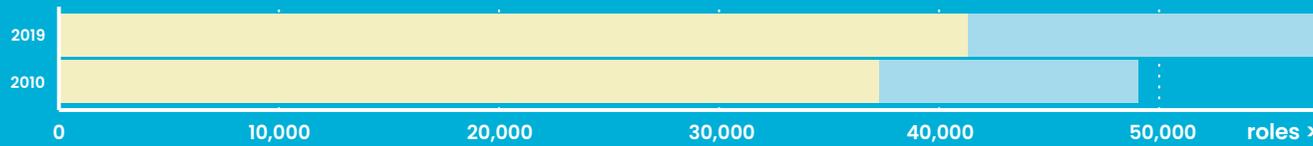


% active postings

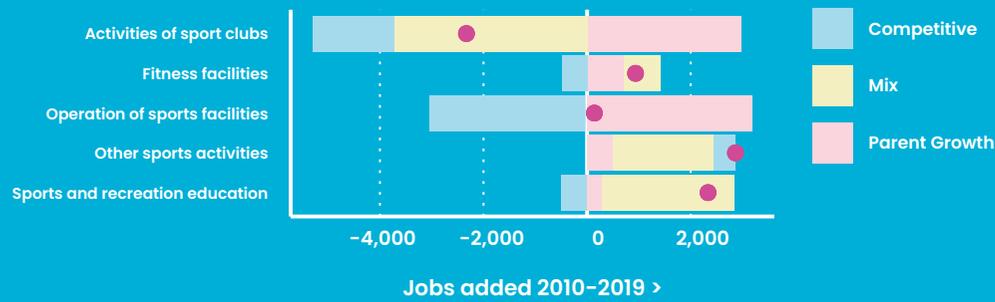
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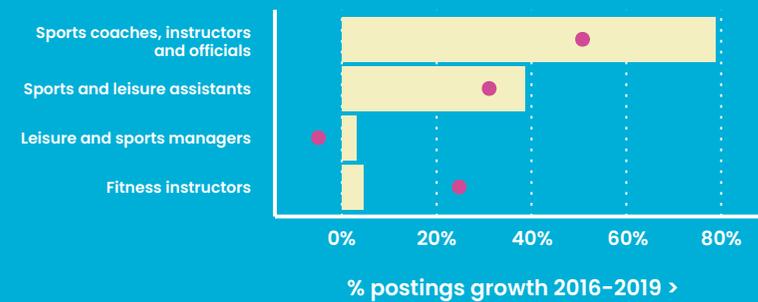
Dashboard: South East



Industry shift-share 2010-2019



Job postings growth by occupation

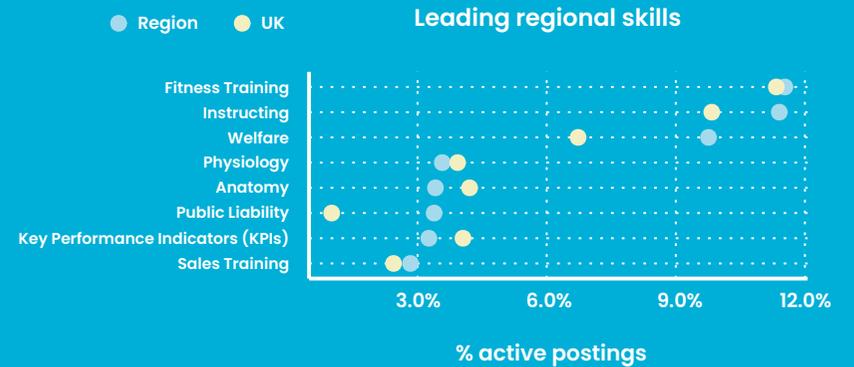


Jobs added 2010-2019 >

% postings growth 2016-2019 >



median salary 2019 >

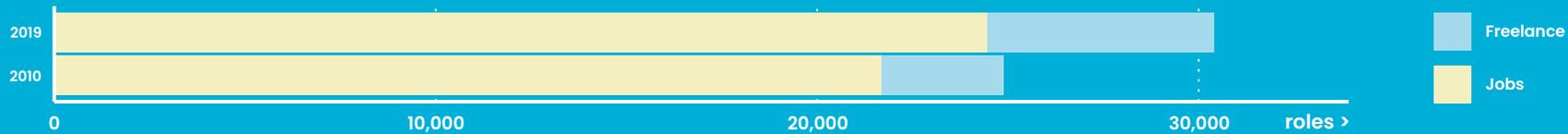


% active postings

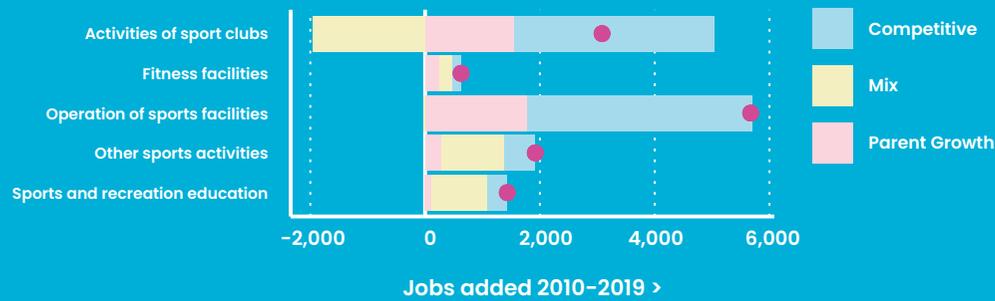
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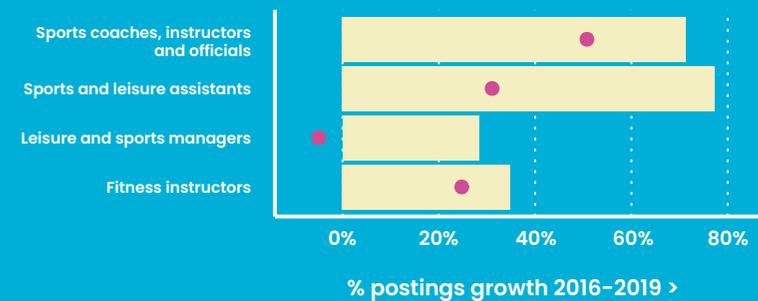
Dashboard: South West



Industry shift-share 2010-2019

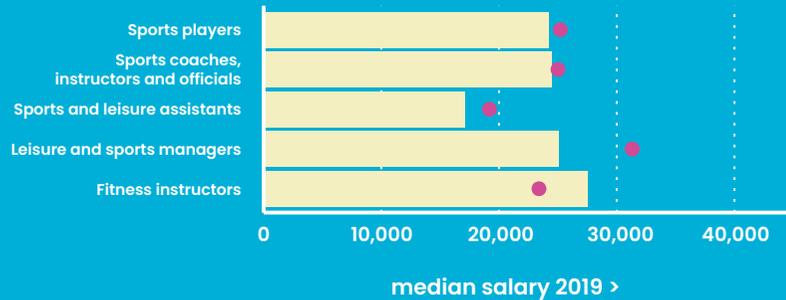
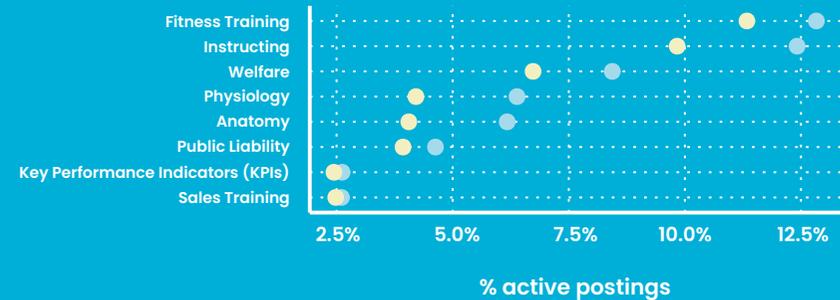


Job postings growth by occupation



● Region ● UK

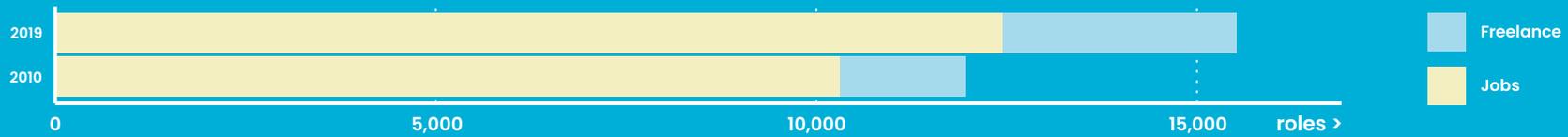
Leading regional skills



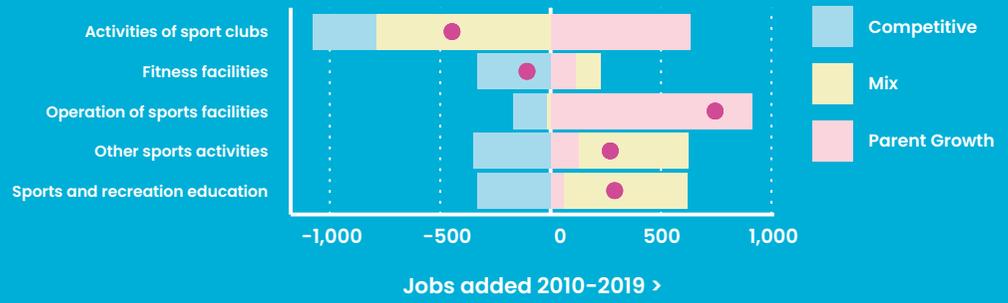
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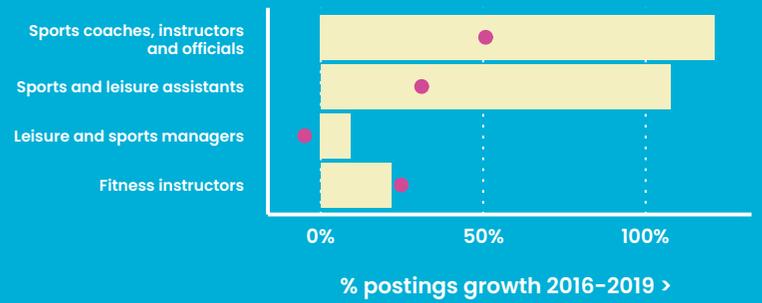
Dashboard: Wales



Industry shift-share 2010-2019

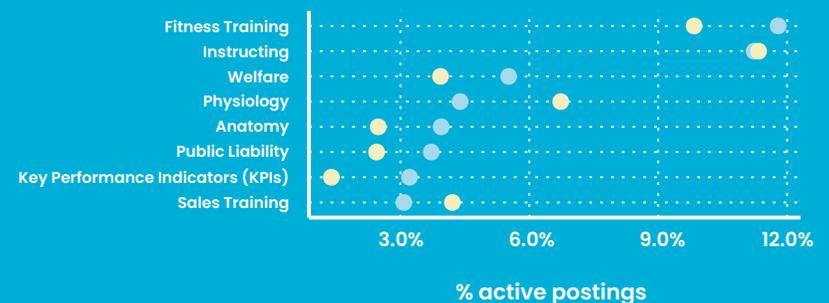


Job postings growth by occupation



Region UK

Leading regional skills



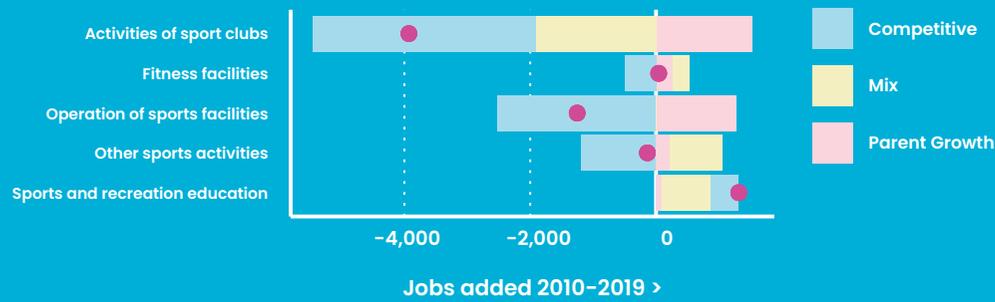
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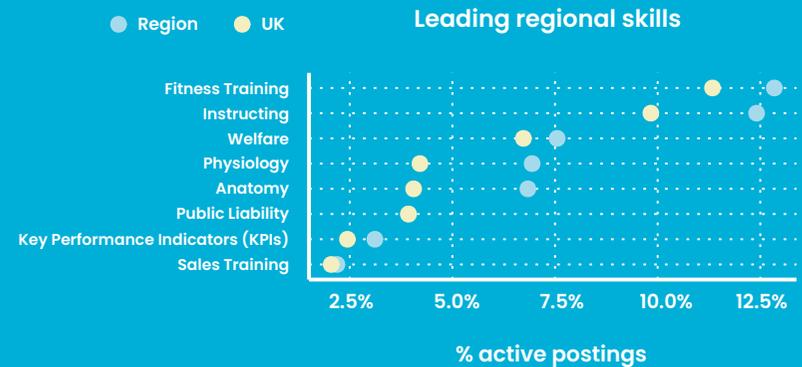
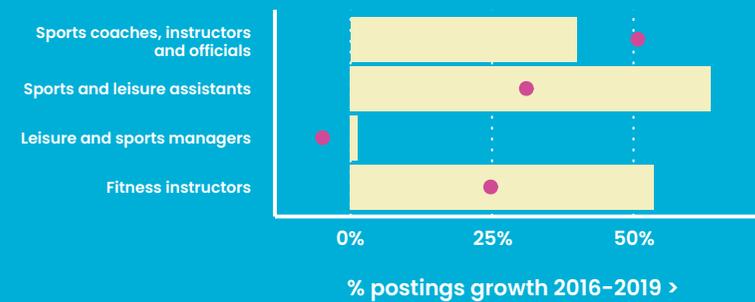
Dashboard: West Midlands



Industry shift-share 2010-2019



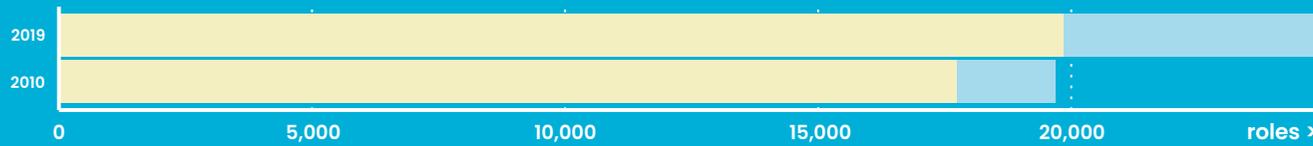
Job postings growth by occupation



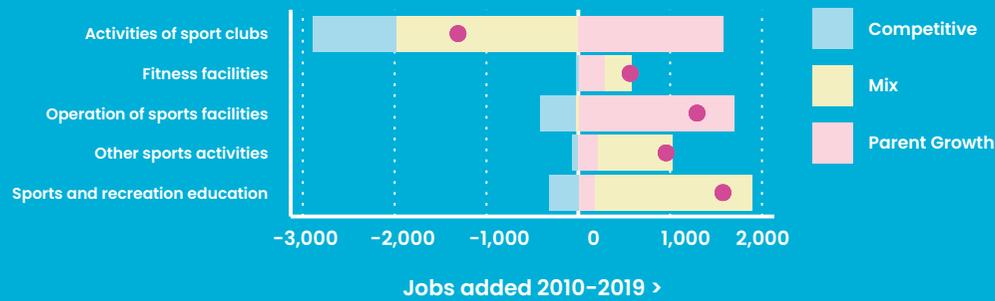
Data: Emsi 2020.1, analysis of Annual Population Survey, Emsi Job Posting Analytics



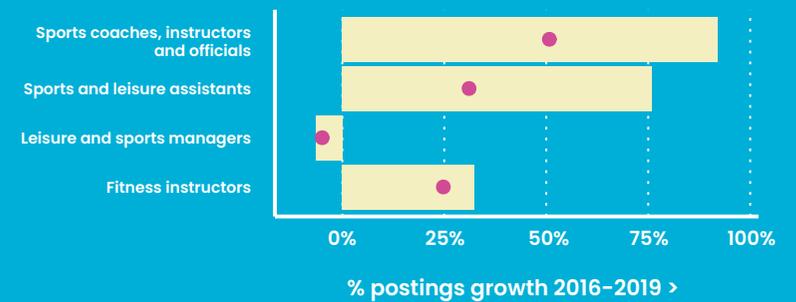
Dashboard: Yorkshire and The Humber



Industry shift-share 2010-2019

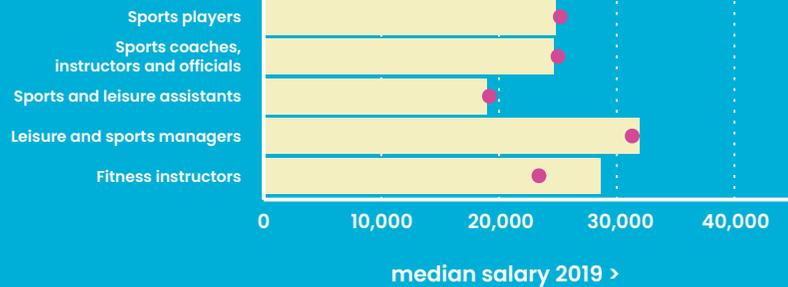


Job postings growth by occupation

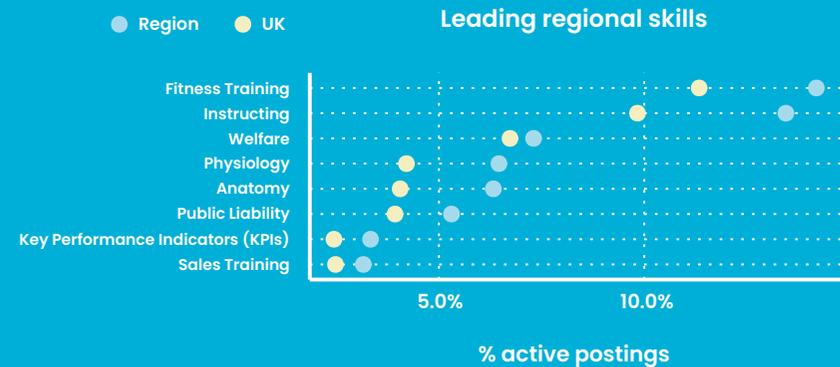


Jobs added 2010-2019 >

% postings growth 2016-2019 >



median salary 2019 >



% active postings

Data: Emsi 2020.1, analysis of Annual Population Survey, Emsi Job Posting Analytics



 **CIMSPA**

The future of skills for sport

The future of skills for sport

Sport and physical activity labour markets have shown sustained growth and professional roles have particular skills demands— but how is this changing? What role do universities play in shaping supply? What skills are hard to come by, and which ones demand a premium?

The future of sport work

The rapid pace of technological innovation has called forth a lot of analysis about how work will change across all industries, as well as sport. To some extent, the growth of sport has been powered by the development of new technology — both in stimulating demand for professional support on sport activities, and providing tools which allow for the professionalisation of sport and fitness instruction. That complementarity between sport and physical activity knowledge and technology is likely to carry forward for some time, with much of professionals' working time spent in tasks like thinking and moving creatively, and imparting expert knowledge to others, which are difficult to automate.

The progress of professionalisation is visible in the high output of sport and physical activity achievements from the university system — averaging 18,000 to 19,000 each year from 2013 to 2018, ahead of trends graduate numbers more

generally. Again reflecting professionalisation, the fastest growth has been in more specialist disciplines and for more advanced, Masters-level degrees — growing by 57 per cent in such a short space of time. These volumes do not match recent demands for new jobs to be filled in sport and physical activity professional roles, although as of yet these roles are not typically held by graduates, and so other sources of supply will remain important.

Evolving supply and demand

We can use employers' job adverts and employees' professional profiles to explore where the biggest differences are between skills in demand and skills supplied.¹ Across the professional labour market, skills in welfare and its associated areas — e.g. child protection and safeguarding — are a repeated area of difference; instruction, physiology and anatomy are important for fitness instructors, while commercial

skills spread across fitness instructors and leisure and sport managers roles. It's the commercial and more technical skills which drive higher salaries, while welfare skills — although in high demand across all occupations — do not typically align with the better-salaried advertised positions.

¹ Skills data is captured in the form of concepts cited routinely by employers in job postings and employees in online profiles, and includes areas of knowledge.

Tasks and technology change

In thinking about responding to the long term challenges of job design amidst organisational change, one central question is on the impact of emerging new technologies— be they artificial intelligence, new materials or new ways of working. Emsi’s own automation model looks at the task content of each role and how exposed those tasks are to technology changes anticipated over the next decade or two.² Tasks are estimated for their share of time, and then classified as

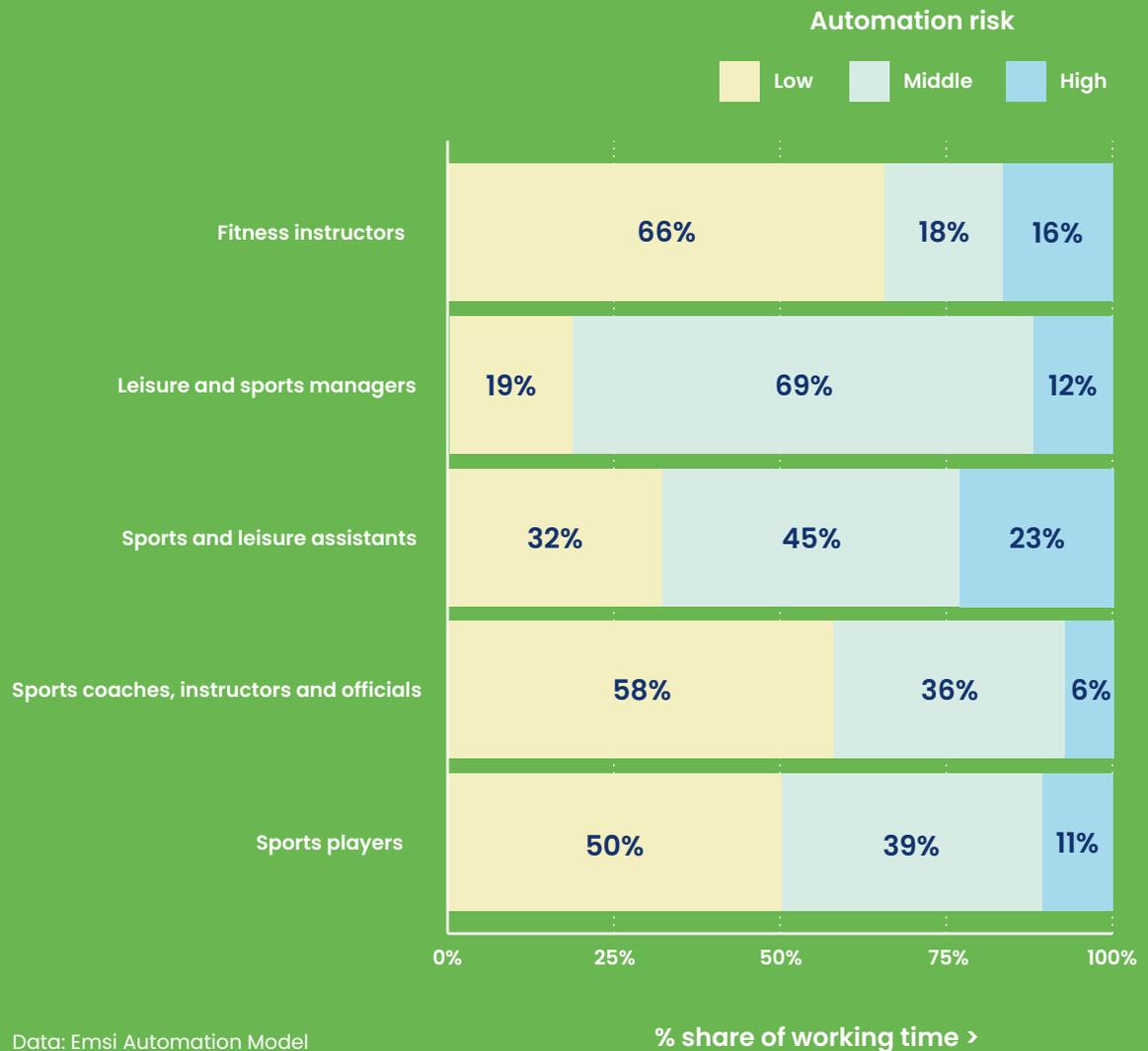
‘High’ for exposure if they have a positive, significant relationship with anticipated technology change, ‘Low’ for exposure if negative and significant; and ‘Middle’ if the relationship is ambiguous.

For our five professional occupations, all are below-average for the task time in ‘High’ exposure tasks: the national average is 27 per cent, while only sports and leisure assistants come close (22 per cent); the other occupations range between 6 and 16 per cent. The emphasis in sports roles on creative thinking, creative physical activity, coaching and developing and training and teaching others all leads to a low level of overall exposure to technology change.

² Emsi (2019). Automation: Analysing the potential risks and opportunities automation could bring to Britain’s labour market. Basingstoke: Emsi UK.

Fitness and sports roles protected from automation risk

Leisure roles have higher exposure, but still low overall



Graduate supply increasing

Between 2013 and 2018 an estimated 110,610 graduates at different levels in different sport and physical activity subjects,³ reflecting broad stability over that time – this compares to a slight (1.4 per cent) decline in graduate volumes overall during that period.

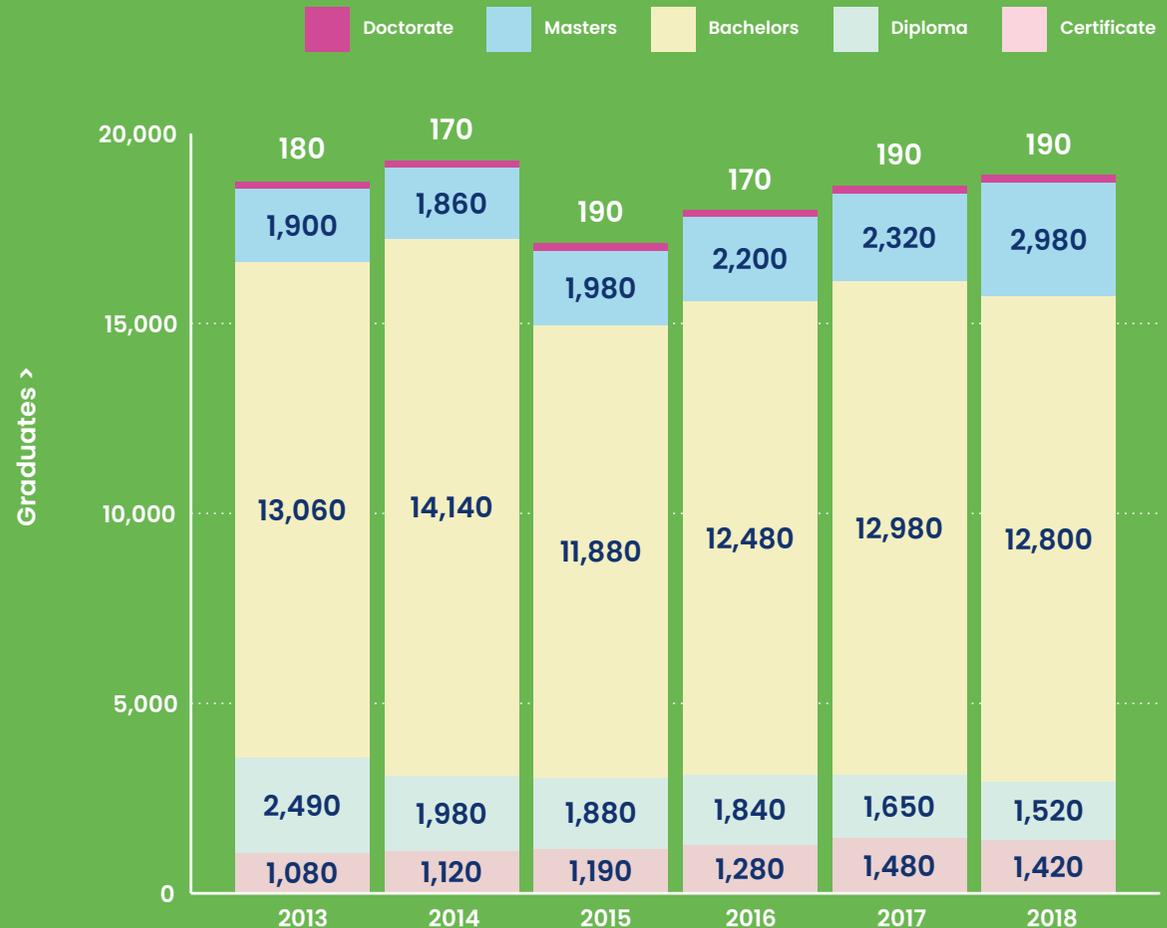
Course achievements below first degree level have been relatively stable, with growth in Certificates balanced out by a decline in Diplomas. Achievements have been much more fast-moving at Masters level, increasing by 57 per cent, from 1,330 to 2,420 from 2013 to 2018, while doctoral graduates have increased but volumes are naturally much smaller.

Across the five sport and physical activity occupations, in 2018 Emsi projected an underlying demand for 28,360 jobs to be filled, but these roles are not at present typically held by graduates – indeed the typical sports and leisure assistant (5,900 jobs to be filled) is typically held by employees with level 2 qualifications.

³ Subjects were selected using the HESA Joint Academic Classification System (JACS), specifically all codes in C6 (Sports and exercise science) and its further branches into coaching; development; conditioning, rehabilitation and therapy; studies; technology; also selected were C813 Sport psychology and N880 Sport management. A further analysis was done to capture all provision with 'sport' in the course title.

Bachelors stable: Masters graduates increased by 57 per cent

Graduates by level, 2013–2018



Data: Emsi 2020.1; rounded and remodelled from HESA 2013–2018

Subject choice

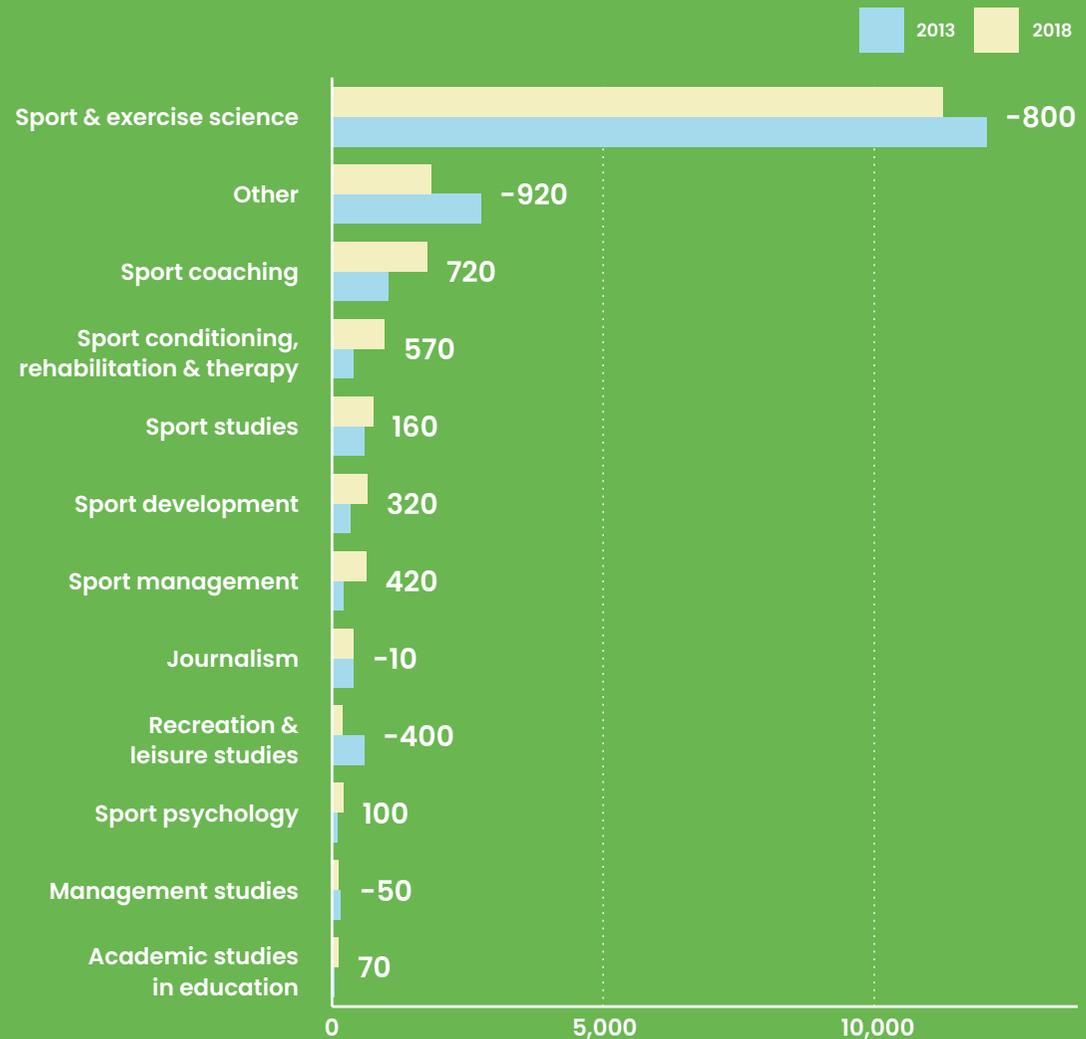
Turning to subject choice, within the overall sport and exercise science category, most graduates are classified within the overall degree subject, but this is changing over time— despite rising overall graduate volumes, courses coded to the general subject 'sport and exercise science' have declined by 800 graduations (7 per cent) between 2013 and 2018, more than outweighed by increases elsewhere. For example, sport coaching has increased by 69 per cent (710 additional graduates at all levels), while sport conditioning, rehabilitation and therapy has increased by 143 per cent (570 additional graduates at all levels).

As is clear from the ranking of 'Other' as second, there is a wide range of sport-related degrees in operation, stretching across medical, education and business-related disciplines.

69%
increase in sport coaching

Sports and exercise science dominant - but declining in volume

Graduates by subject, 2013-2018



Data: Emsi 2020.1; rounded and remodelled from HESA 2013-2018

Graduates >

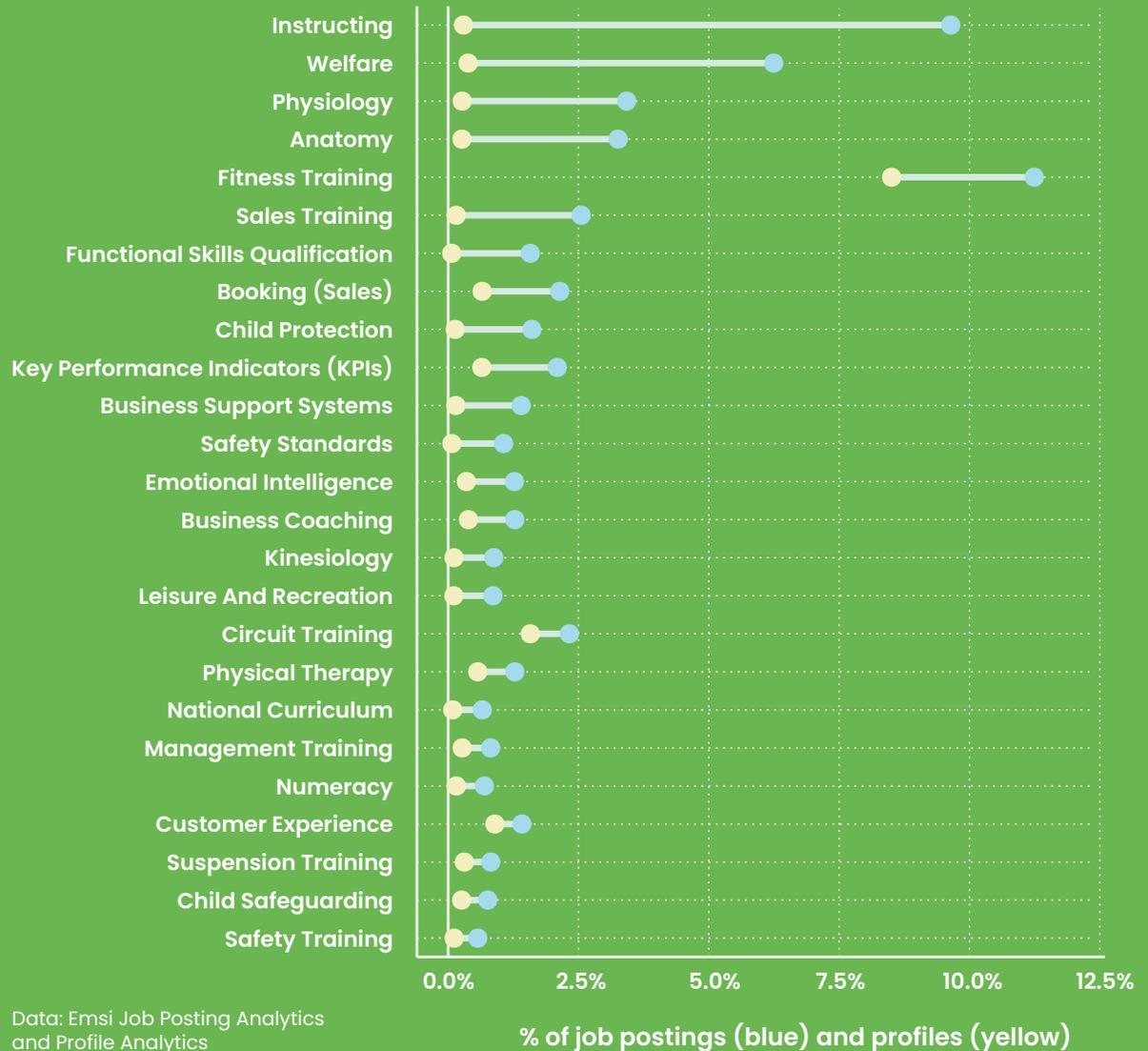
Skills supply and demand

Turning now to what skills are being found harder to come by in the recruitment market. Here we use online job postings as in previous parts of this report, but we add in a further source – online professional profiles, which detail the career histories of individual workers. By classifying postings and profiles using the same skills library and within individual occupations, we can compare where the density of skills in postings – representing employer demand – is not matched by similar density of skills in profiles – representing employer supply.

Looking first across all of the professional occupations, and highlighting the top 25 gaps between skills demanded and skills supply, we can see that instruction and fitness training make up two of the top three, with welfare second. The presence of instruction and fitness training correspond to our earlier findings of relative tightness in fitness instructor recruiting, and instruction and welfare together correspond to similar findings about growing demands for sports coaches. Physiology and anatomy at fourth and fifth round out the picture, with a number of other child protection, National Curriculum and safeguarding skills in the top 25 also highlight the educational dimension to the sport labour market. At the same time, the private sector presence is also important: sales training, KPIs, customer experience and management training also all feature.

Instructing, welfare and fitness training lead as skills in demand

Comparison of skills in demand and supply



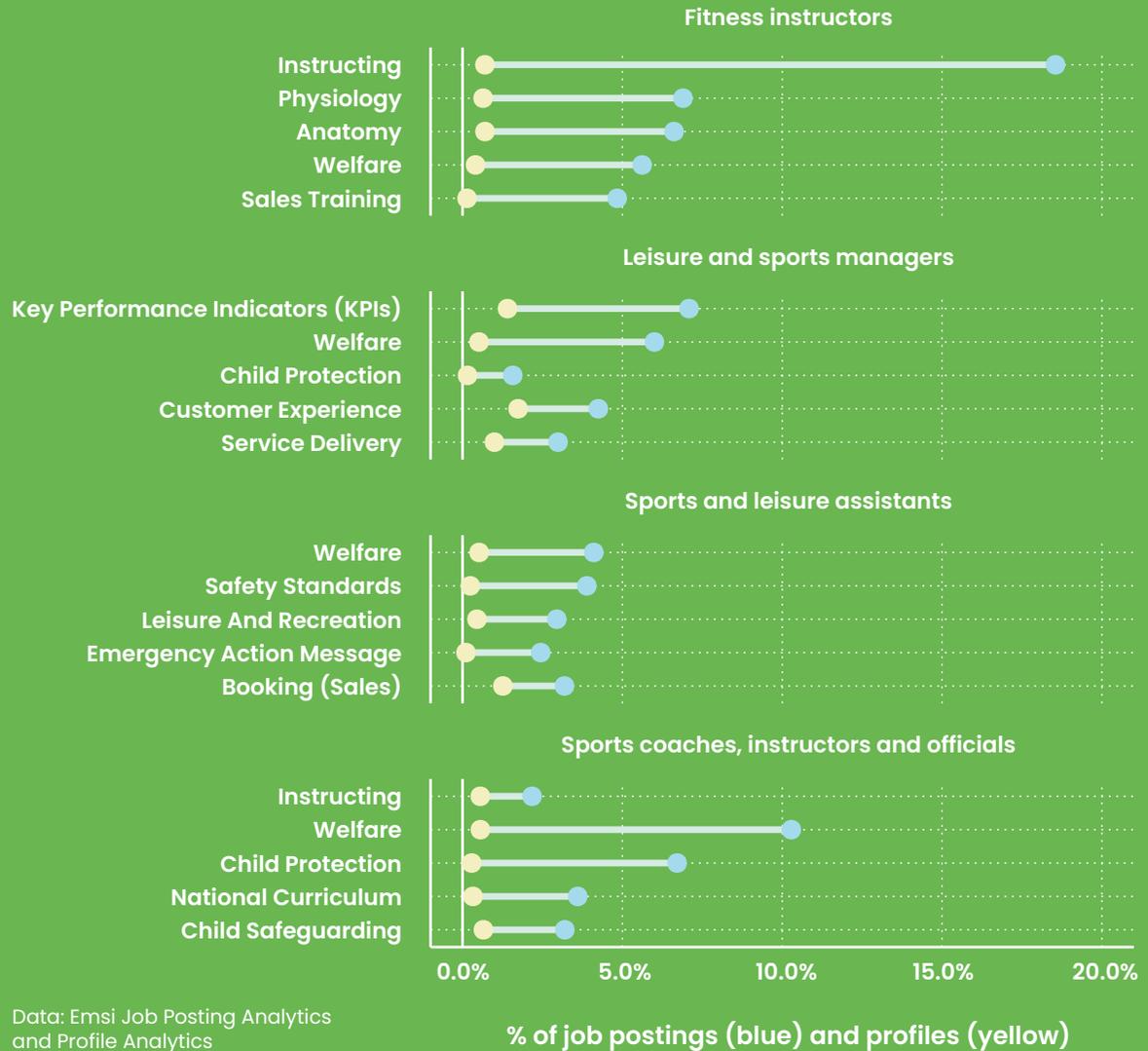
Supply and demand by occupation

We can run the same analysis for the four of the five individual occupations for which we have online postings data, focusing on the top five skills in each case. As suspected from the overall analysis: instructing, physiology, anatomy, welfare and sales training all dominate the fitness instructor labour market (fitness training drops out of the top 5), with instructing especially hard to come by –required by nearly a fifth of postings but very few professional profiles.

Amongst other occupations, sports coaches, instructors and officials have the largest net demands for welfare, child protection, National Curriculum, child safeguarding and Function Skills qualifications. Welfare is in the top 5 for all four occupations – and top 2 for all but fitness instructors, suggesting its high importance; the gap for sports coaches is 9 per cent of postings demand compared to 5 per cent of profiles supply.

Physiology and anatomy critical for fitness; welfare across the board

Comparison of skills in demand and supply by role



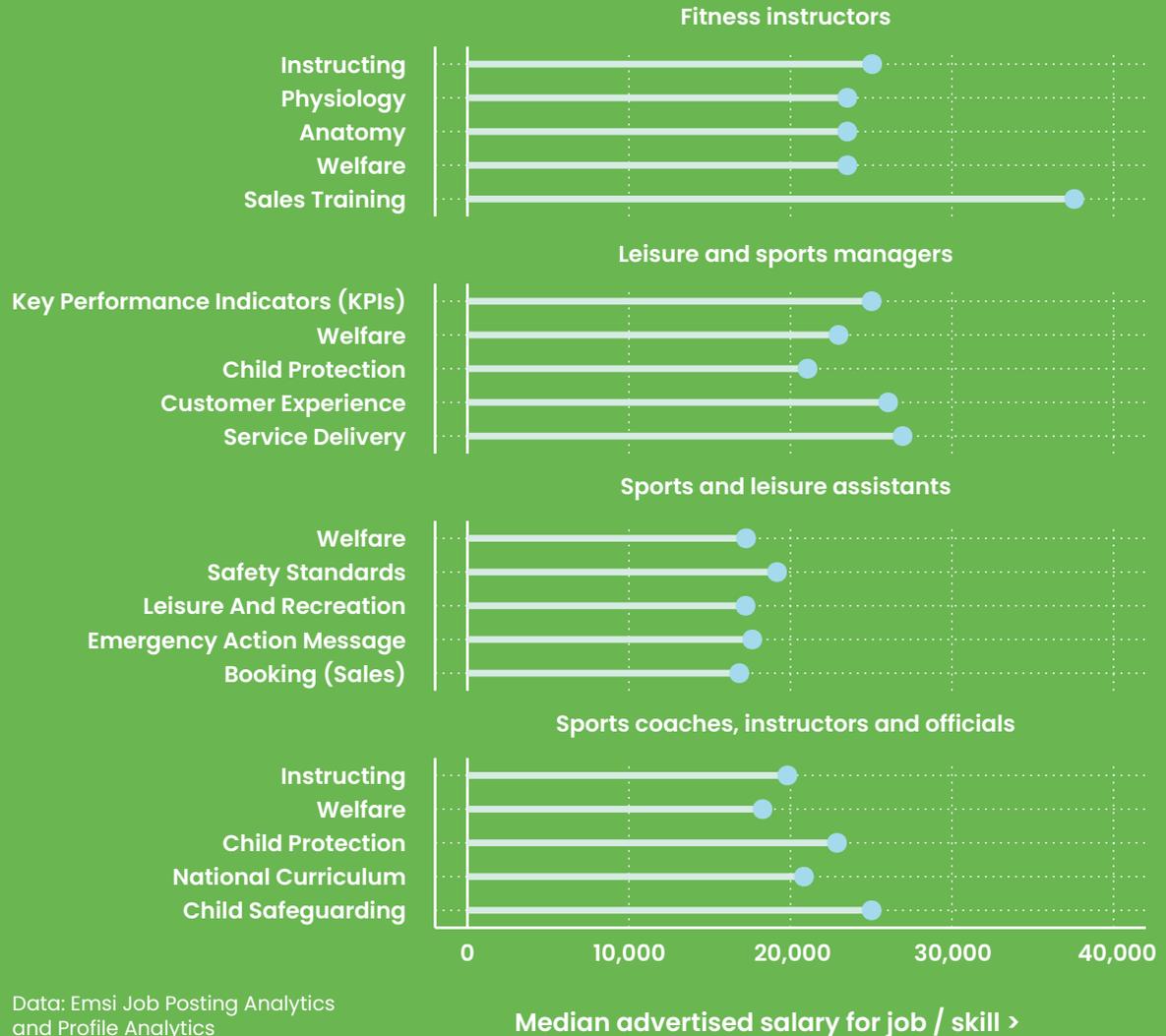
Top skills and pay differentials

Finally we can bring data on posted salary to see how intense skills demands may translate into increased rewards for skilled workers. The interesting finding here is that despite its ubiquity across occupations, welfare does not command particularly high rewards — in no case does it have the highest median advertised salary for the occupation and skill combined, and indeed for sports coaches it is the lowest salary.

Skills which do command enhanced salaries tend to have a more commercial or technical demand: for fitness instructors, candidates with sales training can access job postings with advertised salaries more than £10,000 higher than the other in-demand skills, while similarly for leisure and sports managers it is candidates with service delivery, customer experience and KPI skills that can access better-paid opportunities. Most interesting perhaps, is sports coaches, instructors and officials, which can access substantially higher salaries if they are able to deliver Functional Skills qualifications.

Fitness instructors with sales skills and coaches with functional skills can earn more

Comparison of skills in high demand by advertised salary





 **CIMSPA**

Conclusion

Conclusion

In *Working in an active nation*, Sport England sets out a strategy for developing the sector's professional workforce, starting with a commitment to insight-led delivery as a strategic approach. This report provides a direct input to that approach, while providing valuable evidence with which to consider further developments of the sector.

Strengthening the professional workforce

In the same strategy,¹ Sport England sets out four other strategic approaches to drive the work of sport partner organisations to invest successfully in the professional workforce.

Enhanced leadership and culture

To be a high performing and inclusive sector run by inspiring 'people-focused' leaders at all levels of the professional workforce.

Increased diversity and inclusion

A more diverse workforce with inclusive values and behaviours.

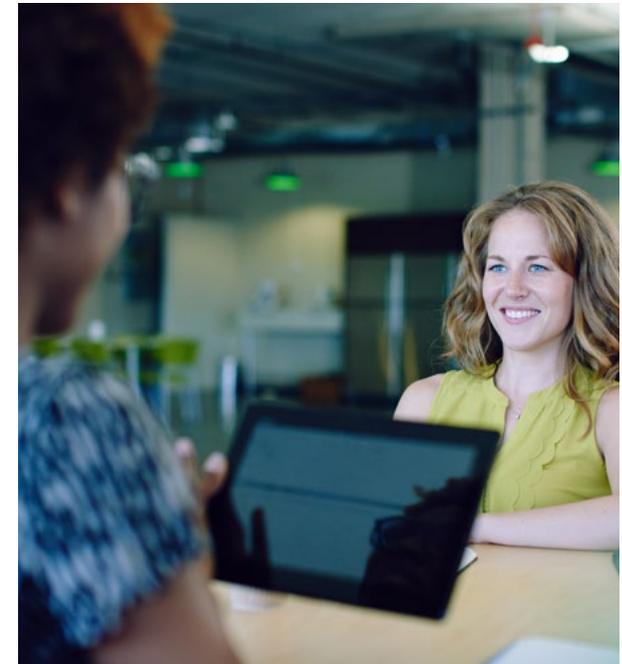
A continuously improving profession

For the sector to be recognised as high performing and professional, encouraging individuals to enter the workforce and develop their abilities throughout their working lives.

Improved employment and career pathways

A sector that is seen as one of the top career choices for prospective graduates, apprentices and trainees, with the highest retention rates in key sector roles.

This report can help to move the discussion forward on a number of these points. First of all, in terms of diversity and inclusion, it is evident from the intelligence presented in chapter 3 that the sport and physical activity professional activity is not especially representative of wider society: it is heavily biased towards a younger and more male workforce, as well as generally having fewer minority ethnic employees. The bias in demographics may reflect specific factors – for example, the demands of being a sports player or the early-career role of sports and leisure assistants both favour younger workers – and so deserve further exploration, but this report provides some quantification of the challenge.



¹ Sport England (2018). *Working in an active nation: The professional workforce strategy for England*. London: Sport England.

Covid-19

At the time of writing, the central risk to all labour market scenarios is the effects of the Covid-19 pandemic and the impact of the lockdown measures taken to limit its spread. As set out in chapter 2, the sport and physical activity sector has not been spared from these effects so far, and nor is it likely to: by its nature, sport and physical activity involves a degree of physical proximity and so it is no surprise that facilities have been closed down with a heavy impact on the ability to work and generate revenue. The near-flatlining of job postings for sports and leisure assistants, and the substantial reduction in new posting for other roles, all point to sharp effects, even if there was in the first month little visible effect on unemployment for sport and physical activity workers.

Where things go from here will depend on many factors outside of the control of the sport and physical activity industry. The economic disruption resulting from Covid-19 will depend on how long and how deeply lockdown measures have to remain in place, or if they are removed prematurely, the disruption from a rising level of infection. The government's mitigating measures – such as CJRS or SEISS – seem from comparison with other economies to have had at least some success, but the longer business conditions for some industries are effectively frozen, the deeper the damage will be.

For the sector, the only thing that can be done until lockdown conditions lift is to continue to look to innovate in using technology to deliver its services, and then prepare to return to business as much as lockdown conditions allow, as they are eased. The medium-term upside from the crisis for the sector will be a renewed awareness of the importance of public health, and there will be opportunities for sport and physical activity to contribute and drive this agenda.

A highly distributed profession

The origins and lasting presence of the sport and physical activity sector in often voluntary settings make for a unique labour market. As discussed in chapter 3, the professional labour market is complemented by a much greater number of voluntary and paid coaches working only a few hours per week – reasonable assumptions are that although the professional labour market performs the larger part of coaching working time, the millions of other coaches' contribution is still large. This background suggests that professional work in sport and physical activity has always been, and will remain, highly distributed across workers.

In terms of enhanced leadership and culture at all levels of the professional workforce, the other key finding from chapter 3 was the range of sport and physical activity professional employment when explored across industry, occupation and

employment status. A narrow view of the sport and physical activity industry includes lots of non-professional employment, but also misses out where a lot of sport and physical activity professionals actually work. In particular, as further explored in chapters 4 and 5, the role of the self-employed, freelance workforce has seen rapid growth over the past decade.

For enhancing leadership and culture, this evolution of the sport and physical activity professional workforce with a more independent employment model with less of a role for organisations, as well as its spread across different industries presents new challenges for those – such as CIMSPA – wishing to set the standard. The spatially diverse nature of the industry, where it is spread widely across the country with only limited concentration and clustering, will also make it difficult for local networks to achieve the critical mass which benefits some other sectors.

Pathways to instruction and coaching

The sustained growth in the number of sport-relevant graduates suggests that real progress has been made in making the profession an attractive option for the future.

One way to build on this will be to ensure that the sector develops pathways from more junior roles – including especially leisure and sports assistants and managers – to the more in-demand, growing and higher-paid roles around fitness instruction and sports coaching. Especially with fitness instruction, there are signs of a tight labour market, with longer duration for recruitment processes.

The skills data in chapter 6 help to highlight the differentiators that can help those with ambitions for those pathways move forward. As well as the background knowledge in physiology and anatomy, fitness instructors need to understand the role of instruction – but they can also benefit from commercial skills. Given the high level of freelancing in fitness instruction, these skills – including especially around sales – are particularly important for sustainable success, and so for CIMSPA understanding the value of these non-sporting skills seems particularly important.

Pay and turnover

Professional roles in sport and physical activity exhibit a very wide range of pay, conditions and employment models. In particular, there are a large number of sport and leisure roles, many with limited pay, while other roles – fitness instructors, sport coaches, sport players – have a much wider range of employment outcomes. At the same time, fitness instructors especially have a very high-turnover employment experience when compared with the wider workforce – and one which does not mitigate one in five vacancies being characterised by a skills shortage.

As the estimates in chapter 4 suggest, there are substantial

costs to employment turnover – on the assumptions set out there, nearly £900 million is lost in inducting new staff members and servicing recruitment activity. There will always be some recruitment costs, and in a fast-changing sector there will always be likely to be greater turnover as new demands trigger adjustments. But at the same time, if the sector can change the way it operates, by revisiting how it employs professionals, there are significant benefits to be had from reducing these costs.

The sustained growth in the number of sport-relevant graduates suggests that real progress has been made in making the profession an attractive option for the future.

Fluidity in skills

Another point that becomes clear from the analysis is the need for all professionals to continue to develop their skills. At its simplest, this requires a recognition of the pace of change for the professional labour market over the past decade; if this pace continues, it will have significant implications for sport and physical activity professionals to evolve to meet demand. The rise in freelancing places the burden of investment much more on individual professionals than it may have done in the past: major employers remain important, but they can only invest in their own employees.

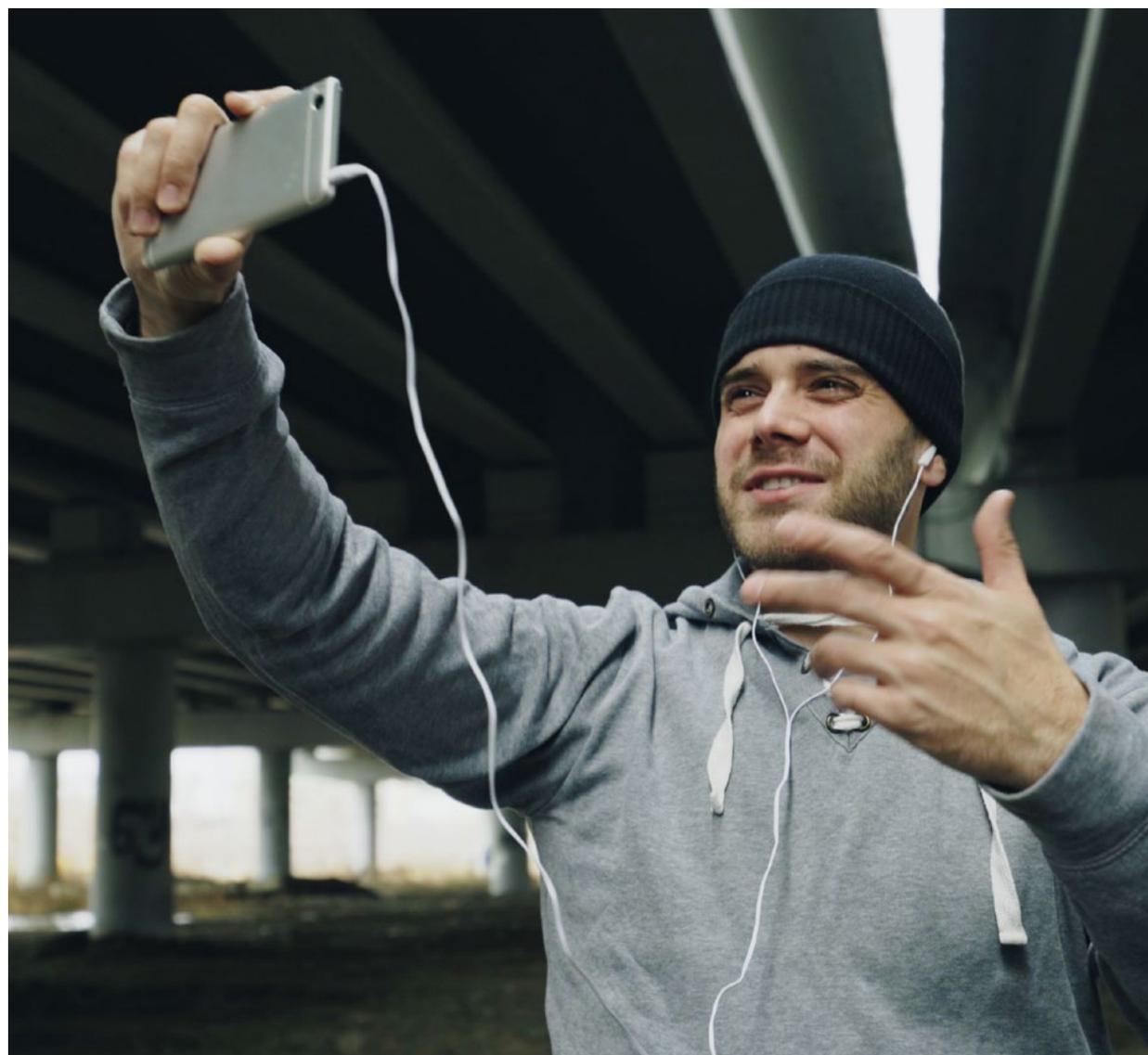
The kind of work sport and physical activity professionals do positions them well for the changing workplace – their working time focuses for the most part on tasks which involve creativity and interpersonal relationships, which are not likely to be automatable in the medium-term. But that doesn't mean technology won't affect them, or other factors: the current high volume of demand for welfare and safeguarding skills shows that the labour market is always being reshaped and monitoring new developments will continue to be important.

Developing the evidence base

Beyond this report, there are several areas in which there is potential to further develop the evidence base. We would highlight especially:

- The need for CIMSPA and its partners to engage with the ONS and other bodies to ensure that future revisions to SIC, SOC and other classifications reflect the changing needs of the sector.
- Understanding the career dynamics within and between sport and physical activity professional roles, to identify which skills help to retain and develop careers within the sector.
- Further exploring the interaction between the much wider base of 3 million total coaches, many of them working for 1-2 hours per week, and the hundreds of thousands of employed and self-employed sports professionals.
- The interaction between the skills professional labour market and sport and physical activity itself, as measured by the *Active Lives* surveys.²
- Investigating the value and impact of sports industry activity both directly in generating economic output but also its relationship with public health outcomes.

² Sport England (2020). *Active Live adult survey*. November 2018/19 Report (April). London: Sport England.





 **CIMSPA**

Appendices

Appendix A: Emsi data

Our data is at the heart of what we do and we are confident that it is the most reliable, accurate and granular labour market insight available in the UK.

We take the view that to get a realistic picture of your focus labour market, rather than looking at traditional labour market intelligence or 'big data' like job postings or profiles alone, you need them together. This is why we have uniquely integrated these different data sources, to give you one seamless dataset describing various aspects of the economy in your area and beyond – available through software tools, research consulting, or API access.

Labour market intelligence

Over 2 billion data points ranging across jobs, earnings, employment levels, education output, and more. Data are sourced from a range of government datasets; but we synthesise them and model to infer missing cases; then we project forward job counts ten years from latest BRES (now to 2028), detailed down to local areas (LAU1) and specific occupations (4-digit SOC) and industries (4-digit SIC).

Job posting analytics

Harvested from tens of thousands of job boards, JPA is updated every month with between 800,000 and 1 million new unique postings – we have a database of more than 40 million postings as of writing. Every posting is categorised across

occupation (4-digit SOC), detailed job title, location, company name and against Emsi's continuously updated library of nearly 30,000 common and hard skills. Metrics include posting counts, but also posting intensity, posting duration and salary.

Profile analytics

A database of 11 million professional employment profiles, Profile Analytics provides a supply-side counterpart to the content-rich, demand-side intelligence from JPA. Each profile captures occupation, detailed job title and location, just as with job postings, as well as categorising against Emsi's skills library. In addition, the data allows identification of universities and degree subject areas, as well as in some cases the career path through which a professional has reached their current role.

Most of this report was produced using the stack of Emsi data sources described on the previous page. Additional intelligence was developed using the following methods and sources.

Industry and occupations

As discussed in the main report, industries were selected for the study using the following five industries from the ONS SIC 2007 taxonomy:

- 8551 Sports and recreation education
- 9311 Operation of sports facilities
- 9312 Activities of sports clubs
- 9313 Fitness facilities
- 9319 Other sports activities

Occupations were then identified through a concentration metric on staffing patterns for the sports industries as a group, identifying unit groups from ONS SOC 2010 which were most concentrated in the group compared to the whole economy. These were then selected where they had a strong sports content:

- 1225 Leisure and sports managers
- 3441 Sports players
- 3442 Sports coaches, instructors and officials
- 3443 Fitness instructors
- 6211 Sports and leisure assistants

Self-employment

Emsi data on local jobs is estimated from counts in ONS BRES, which includes jobs from local units registered for VAT and/or PAYE. This includes proprietors who own the enterprise as well as jobs, but does not include freelance self-employed outside of VAT or PAYE compliance requirements. To account for that additional number, we use data from the ONS Annual Population Survey summarised on the Nomis table Regional – Occupation by Sex by Employment Type.

Data were downloaded for 2010 and 2019 for NUTS1 regions for all levels of ONS SOC 2010 occupations and for all Job Types. They were then subject to an iterative fitting to ensure consistency with marginal totals across all geographic and occupational levels. The data were then integrated with the Emsi data on local jobs, netting the Nomis self-employment category from the Emsi proprietor category to obtain an estimate of 'Freelance' employment.

Two caveats are needed when interpreting the data. First, BRES data is 'jobs'-based, whereas Annual Population Survey data is 'employee'-based, on the basis of primary occupation; one employee can have more than one job, but only one primary occupation. The assumption is

made that primary self-employment is consistent with appearance as a BRES proprietor. Second, BRES data is workplace-based whereas Annual Population Survey is residence-based. At NUTS1 level this is not considered to be a substantial problem, as the regions are of sufficient scale to avoid significant mismatch.

Ethnicity and nationality

Ethnicity and nationality estimates are obtained from twelve quarters of data from the Labour Force Survey data, used under Crown Copyright for the benefit of CIMSPA and its members, and accessed from the UK Data Archive.

Travel to work areas

Travel to work areas are identified by looking for maximum spatial alignment with 2015 local authority districts and unitary authorities. Where there are multiple TTWAs overlapping with a local authority area, the largest overlap is used to define the group, with one exception: the Isles of Scilly are integrated with Cornwall. The process results in 180 regions, compared to the 228 TTWAs in the ONS set.

Appendix B: Occupation data

	FITNESS INSTRUCTORS	LEISURE & SPORTS MANAGERS	SPORTS & LEISURE ASSISTANTS	SPORTS COACHES, INSTRUCTORS & OFFICIALS	SPORTS PLAYERS	TOTAL
Employment by status						
Jobs	33,440	56,900	63,520	77,100	18,430	249,380
Proprietors	2,190	3,270	460	4,290	1,110	11,320
Freelancers & Other	44,800	4,150	2,770	19,750	4,200	75,670
Total	80,440	64,310	66,750	101,130	23,740	336,370

Employment growth

Change since 2010	33,890	9,730	3,590	12,720	3,280	63,200
% growth since 2010	72.8	17.8	5.7	14.4	16	23.1

Earnings

Median annual earnings	23,391	31,312	19,182	25,006	25,204	24,826
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Job postings

Unique job postings	122,892	45,302	39,711	41,455	0	249,360
Unique companies	9,304	9,947	6,821	8,632	0	29,006
Posting intensity	3.77	2.95	2.95	2.71	0	3.31
Posting duration	32	27	27	28	NA	29
Median advertised salary	25,056	26,080	17,120	20,832	NA	21,600



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