ESSA-SPORT

Improving the Supply of Skills to the Sector

NATIONAL REPORT

Analysis of labour market realities and challenges in the sport and physical activity sector

Denmark

September 2019

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THE ESSA-SPORT PROJECT AND BACKGROUND TO THE NATIONAL REPORT

1. THE ESSA-SPORT PROJECT AND BACKGROUND TO THE NATIONAL REPORT

a) The ESSA-Sport Project

The aim of the ESSA-Sport project, funded by the European Commission under the Erasmus+ programme, was to establish a European Sector Skills Alliance covering the full breadth of the sport and physical activity sector across the European Union. The project was a direct response to the identified needs and challenges of the sport and physical activity sector.

The 3-year project, which began in October 2016, aimed to create a knowledge base and plan for action within the sector on the key issues of skills and workforce development which are central to helping the sector grow, to equip those working or volunteering with the right skills and to enable the sector to fulfil its potential as a social, health and economic driver. The overall ambition was to create an evidential basis for change and improvement, to create a major consultation on skills and to build a lasting consultation network at national and European level to take forward the conclusions and recommendations made in national and European Reports.

The project has identified skill needs and future priorities based on national and European level research and consultation activities.

The consortium, composed of 20 national coordinators and 5 European networks, is proud to have generated new knowledge and data as well as consultation activities at all levels to support policy and priority actions in the sport and physical activity sector.

b) The National Report

This National Report presents the main findings collated and analysed through the ESSA-Sport project at the national level.

Each nation in Europe has its own specificities, realities and challenges in terms of employment and skills in sport and the aims of the national report are:

- to describe the national sport and education systems
- to present new knowledge gathered for the sector in terms of employment and skills
- to propose concrete conclusions and recommendations/ priority actions for implementation at the national level.

c) The sport and education system

The first step of the overall process was for all national coordinators to conduct a series of desk research activities using a common methodology.

Firstly, in Section 2 of this report, there is a presentation of key political, geographical, economic and population factors and characteristics of the national labour market.

Section 3 presents the characteristics, evolution and future perspective of the national sport and physical activity sector/system.

The overall national education and training system is presented in Section 5 and the way it is specifically organised in the sport and physical activity sector is presented in Section 6.

d) Sport Labour Market Statistics

Section 4 of the national report focuses on the work carried out by national coordinators and the main findings obtained in an attempt to collate available data and statistics on the sport and physical activity labour market in all EU Member States.

Indeed, to make an impact on the sector and allow it to unlock its potential to improve people's lives, it is necessary to have a precise idea of the size and characteristics of the current labour market, and information about changes and tendencies. This information has been missing for many years since the last (partial) attempt to get a European map of employment for the sector took place in 2004 (Vocasport project, EOSE 2004).

The aim of the current initiative was to fill a knowledge gap by undertaking wide research activities at both European and national levels to identify the scale and scope of employment in the emerging and growing sport and physical activity sector.

NACE is the statistical classification of economic activities in the European Community, while ISCO is the International Standard Classification of Occupations. The ESSA-Sport consortium has been successful in collecting the most relevant NACE and ISCO data related to the sport sector gathered from National Statistics Offices and the European body Eurostat. This data on the size and characteristics of the sport labour market at the national level is presented in section 4.

e) European Employer Skills Survey

Following the desk research and collection of available statistics for the sport labour market, the focus was then to design and launch the first ever European Employer Skills Survey for the sport and physical activity sector. The objective was to consult the widest variety of employers from the sector and collate data on the labour market, skills needs, gaps and shortages, future tendencies/perspectives, realities and difficulties to recruit and retain staff and volunteers.

In the context of a dynamic and complex labour market, gathering information on current and future skill needs can support better matching of education, training, and employment.

In recent years, better understanding of labour market needs and skills matching has featured prominently on the policy agenda of many countries, driven by both rapid technological advances and global competition. Skills matching can also help reduce unemployment, particularly among young people. It helps to build a better life for individuals by improving employability, social mobility, and inclusion.

The ambition through the design and launch of the first ever European Employer Skills Survey for the sport and physical activity sector was to identify and analyse the growing and changing labour market, to build an up-to-date picture of employment, and to identify the skill needs and future priorities based on national and EU-level research – building a skills map for the sector.

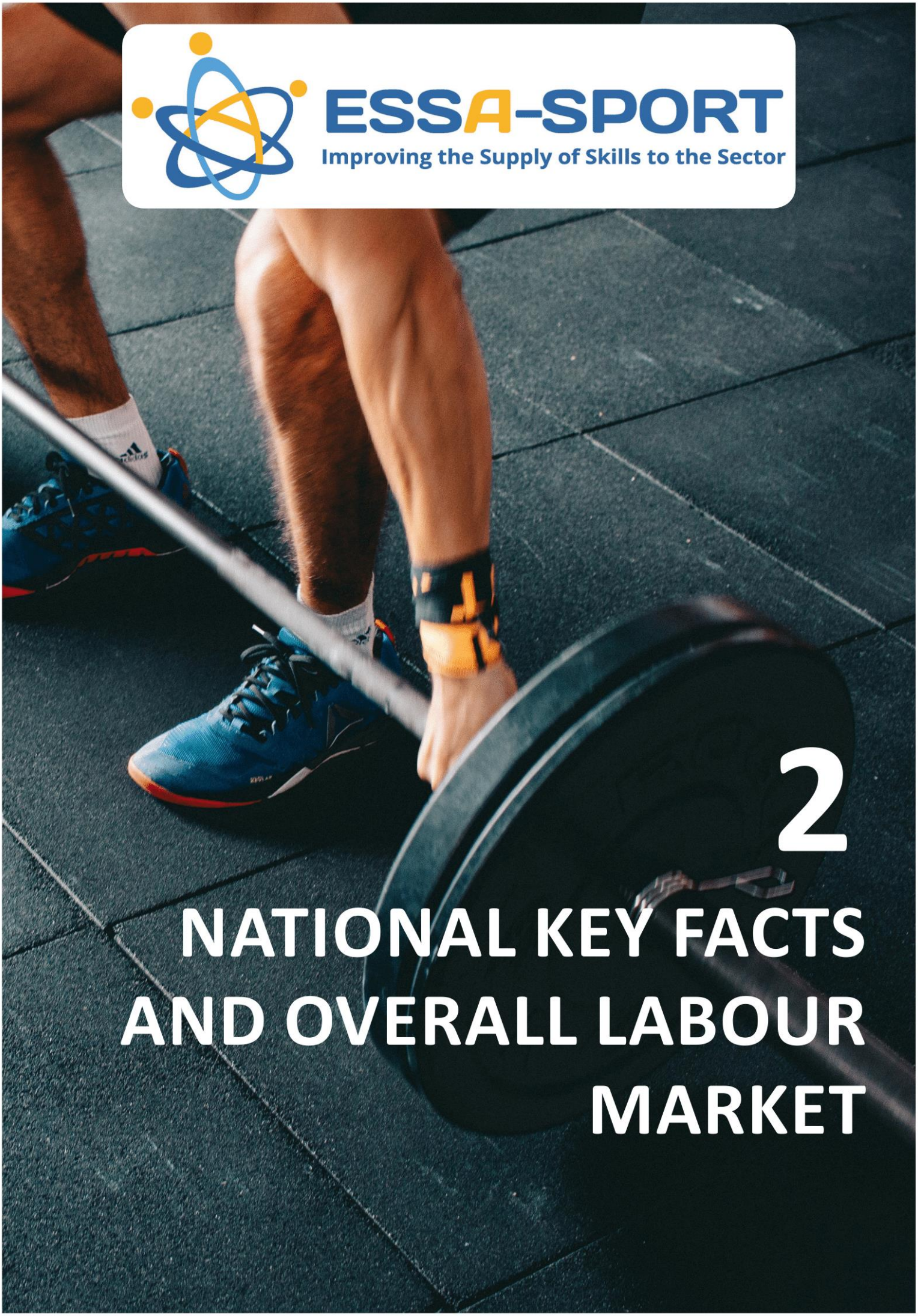
The main results and key information from the European Employer Skills Survey at the national level are presented in Section 7 of this report.

f) Consultations and conclusions

Once all of the employment and skills data had been gathered from sources of labour market statistics and the Employer Skills Survey had been conducted, the aim in each country was then to discuss and consult on the data with relevant national stakeholders through meetings, round-tables, one-to-one discussions etc. A summary report on consultation activities implemented at the national level is presented in Section 8.

Finally, it was the aim of the ESSA-Sport project to implement a bottom-up approach and present national findings and conclusions from the entire project and all activities including desk research, data collection and consultation.

The development of recommendations and actions for the sector to tackle the identified challenges will ensure the legacy of the ESSA-Sport project as the sector builds on the data collected for sustained reforms to improve skills of paid staff and volunteers and meet the potential of the sport and physical activity sector. National conclusions and recommendations are presented in Sections 9 and 10 of this report.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NATIONAL KEY FACTS AND OVERALL LABOUR MARKET

2. NATIONAL KEY FACTS AND OVERALL DATA ON THE LABOUR MARKET

Presentation of the key political, geographical, economic and population factors relating to your country and characteristics of the labour market

a) National key facts and data

The purpose of this section is to provide an overview of the Danish labour market for sport and physical activity based on statistics collated from Statistics Denmark and other relevant sources.

Denmark is a part of Scandinavia (together with Norway and Sweden) located in Northern Europe (map 1). It is south of Norway and Sweden and borders on Germany to the south (see map 1). Together with the Faroe Islands and Greenland, which are autonomous, it makes up the Kingdom of Denmark.[1]

Map 1: Denmark and neighbouring countries (Google Maps, 2018)

Denmark is a parliamentary representative democracy, a constitutional monarchy, and a decentralised unitary state. Queen Margrethe II is head of state, and a prime minister is head of government and presides over the cabinet accountable to a unicameral parliament. The country has been a member of the European Union (EU) since 1973 and Schengen since March 2001 and has 13 seats (14 after Brexit) in the European Parliament. The Danish currency, the Danish krone (DKK), is tied to the euro.[2]

Denmark covers an area of 42,924 km^2 with a population of 5.75 million, and hence a population density of 134 inhabitants per km^2 (2017), however, with large differences between its 98 municipalities ranging from 15 (Læsø) to 12,059 (Frederiksberg) inhabitants per km^2. Copenhagen is the capital and largest city with a population of 1.3 million.

[1] The kingdom was unified during the 8th century.

[2] Before the euro, the Danish Krone was tied to the German currency (D-Mark).

Table 2.1: Total population by gender and age (%)

	Total Population	Gender		Age		
		Female	Male	0-14	15-64	65+
2018	5,781,190	50.2	49.8	16.7	64.1	19.2
2017	5,748,769	50.2	49.8	16.7	64.2	19.1
2016	5,707,251	50.3	49.7	16.8	64.3	18.8
2015	5,659,715	50.3	49.7	17.0	64.4	18.6
2014	5,627,235	50.4	49.6	17.2	64.5	18.2
2013	5,602,628	50.4	49.6	17.4	64.7	17.8
2012	5,580,516	50.4	49.6	17.7	65.0	17.3
2011	5,560,628	50.4	49.6	17.9	65.3	16.8
2010	5,534,738	50.4	49.6	18.1	65.6	16.3

Since 2010, the population has increased with 214,031 people (3.9%) (see table 2.1). During this period, the share of pensioners (65+) has risen with 2.8 percentage points, while the share of 0-14 and 15-64-year-olds have decreased with 1.4 percentage points.

In 2018, the Danish gross domestic product (GDP) was approximately 2.22bn, which amounts to DKK 382,900 per capita (PPP) (in 2018 prices). This is an increase PPP of 1.4% since 2017 (Statistics Denmark, 2019b).

Denmark is an open market economy with a high degree of business and labour freedom. Denmark is also characterised by low levels of corruption and is continually ranked in the top of Transparency Internationals Corruption Perception Index. Denmark is characterised by having a relatively free economy, but with high taxes and a high level of government spending. In terms of economic freedom, Denmark is ranked 12th in the world (2018) by the Heritage Foundation, an American conservative think tank, and 15th (2017) by the Fraser Institute, which is a libertarian Canadian think tank. In 2016, government spending accounted for 53.6% of Danish GDP in 2016 with France (56%) and Finland (56%) being the only countries with higher government spending relative to GDP[3] (Eurostat, 2019).

[3] The European Union average was 46.6% in 2016.

b) Characteristics of the overall labour market

In Denmark, working conditions and wages[4] are defined through collective agreements between labour unions, which workers are free to join, and employer organisations in the individual sector, and there is therefore no official minimum wage defined by law.

Approximately 80% of the labour force are covered by a collective agreement with around 67% of the Danish workers being members of a labour union, typically organised according to the economic sector and educational background. Employers' organisations are organised according to sector, however, with the largest organisations including many sectors (Danish Business Authority, n.d.).

1) Labour force and employment

The minimum legal age for full-time employment is 15, while the retirement age is 65. Hence the working age is 15-64. In 2016, there were 3.69 million people in the working age with 2.93 million (80%) being included in the labour force (see table 2.2 and 2.3).[5]

Table 2.2: Total labour force (absolute) and employment (%)6

	Labour Force	(ILO) Unemployed	Total share of individuals in employment					
			Employed	Gender (%)		By age (%)		
				Female	Male	15-24	25-54	55-64
2018	2,935,000	149,000 (5.3%)	2,786,000	47.7	52.3	14.9	67.0	18.1
2017	2,906,000	171,000 (6.3%)	2,735,000	47.7	52.3	15.0	67.2	17.8
2016	2,934,000	186,000 (6.3%)	2,748,000	47.6	52.4	15.4	67.3	17.2
2015	2,860,000	180,000 (6.3%)	2,680,000	47.4	52.6	15.0	68.2	16.8
2014	2,832,000	191,000 (6.7%)	2,641,000	47.5	52.5	14.6	68.8	16.6
2013	2,826,000	202,000 (7.1%)	2,624,000	47.9	52.1	14.6	69.1	16.3
2012	2,841,000	218,000 (7.7%)	2,623,000	47.8	52.2	14.8	69.0	16.2
2011	2,866,000	221,000 (7.7%)	2,645,000	47.7	52.3	15.0	69.0	15.9
2010	2,874,000	218,000 (7.6%)	2,656,000	48.0	52.0	14.8	69.3	15.9

In 2018, the 25-54-year-olds accounted for more than two thirds (67%) of the total employment, a small fall since 2010, which means that the 15-24 and 55-64-years-old account for a larger proportion of the employment in 2017 than in earlier years (see table 2.3). From 2013-2018 the labour force has increased with 109,000 people after a fall of 48,000 from 2010 to 2013.

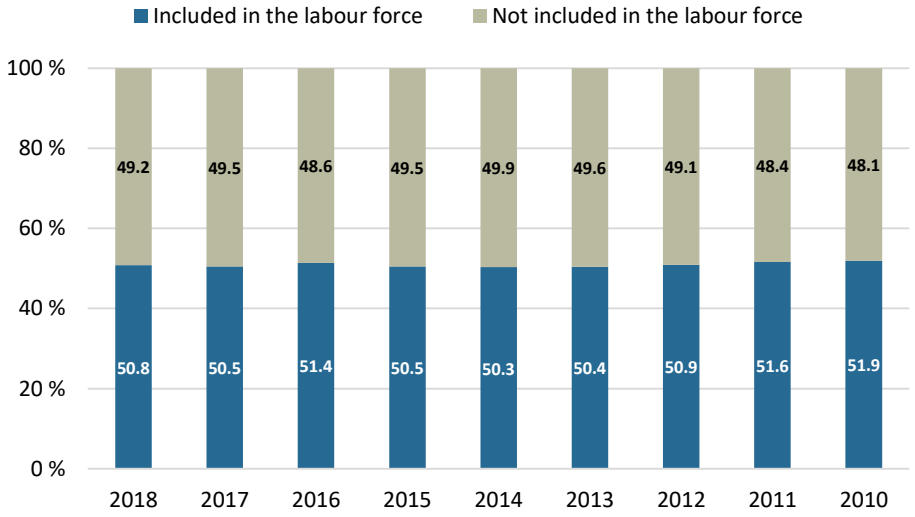
Throughout the period, it is just over half of the total population, which has been included in the labour force. In 2018 it was 50.8% (figure 2.1).

[4]Including pensions, working time and other related issues.

[5]According to the Labour Force Survey in Denmark, which is the Danish contribution to the European Labour Force Survey, which is included in the unemployment statistics of Eurostat and the OECD.

[6] These figures are based on the persons included in the labour force. In 2016 736.000 persons in the age of 15-64 was for different reasons not included in the labour force. When including those outside the labour force in this age group (15-64), 74.9% were employed.

Figure 2.1: Share of labour force relative to the whole population (%)



The unemployment rate in 2018 was 5.3% and has fallen since its peak in 2011 and 2012 (7.7%) (table 2.3). Across age groups, the unemployment rate in 2016 was highest for the group aged 15-24 (12%) and lowest for the 55-64-years-olds (4%).

In 2018, more men (52.3%) than women (47.7%) were employed, which is primarily due to the fact that men make up a higher share of the total labour force. As it appears from table 2.3 the share of (ILO) unemployed women (5.5%) and men (5.2%) is more or less at the same level.

Table 2.3: Share of the labour force being (ILO) unemployed, 2010-2018 (%)

	Total (ILO) unemployment	Female	Male	15-24	25-54	55-64
2018	5.3	5.5	5.2	10.3	4.6	3.8
2017	6.3	6.4	6.1	12.4	5.7	3.9
2016	6.3	6.8	5.9	12.0	5.5	4.0
2015	6.3	6.5	6.1	10.9	5.7	4.3
2014	6.7	7.0	6.6	12.7	5.9	4.8
2013	7.1	7.4	6.9	13.0	6.3	5.1
2012	7.7	7.7	7.7	14.0	6.7	5.6
2011	7.7	7.5	7.9	14.2	6.6	5.8
2010	7.6	6.5	8.5	14.0	6.6	5.4

Historically, the unemployment rate has been highest among the youngest group (15-24) and lowest among the oldest group (55-64) (see table 2.3). In 2010 and 2011, the unemployment rate was higher among men. This, however, shifted in 2013, and since then the unemployment rate has been a little higher among women.

c) Employment across sectors

Based on the statistical classification of economic activities in the European Community (NACE codes), employment is divided into 21 sectors.

The four largest sectors in Denmark in 2017[7] were 'Human health and social work activities,' which in 2017 accounted for 17.9% (511,159 people) of the total employment followed by 'Wholesale and retail trade; repair motor vehicles/motorcycles' (445,676), 'Manufacturing' (302,346) and 'Education' (230,626) accounting for 15.6%, 10.6% and 8.1%, respectively (see table 2.4).

Table 2.4: Total number of employed individuals per economic sectors (NACE Rev.2 Codes)

NACE CODES – SECTIONS	TOTAL NUMBER OF EMPLOYED INDIVIDUALS						
	2011	2012	2013	2014	2015	2016	2017
A - Agriculture, forestry and fishing	70,724	71,324	71,575	71,335	71,350	69,720	70,744
B - Mining and quarrying	4,925	5,537	4,005	4,120	4,216	4,224	4,656
C - Manufacturing	295,979	288,318	285,404	289,859	292,118	298,034	302,346
D - Electricity, gas, steam and air conditioning supply	11,109	11,215	10,472	10,547	10,599	10,845	10,914
E - Water supply; sewerage, waste management, remediation activities	11,538	11,265	11,193	11,206	11,466	11,602	11,767
F - Construction	156,532	154,245	151,116	155,471	161,187	165,964	171,908
G - Wholesale and retail trade; repair motor vehicles/motorcycles	421,888	421,479	422,060	424,498	430,206	439,164	445,676
H - Transportation and storage	138,373	133,235	132,855	133,379	132,256	133,500	133,860
I - Accommodation and food service activities	89,327	91,862	95,209	100,390	106,677	113,080	117,176
J - Information and communication	99,761	100,375	100,823	101,565	105,874	109,193	111,158
K - Financial and insurance activities	81,574	79,268	78,570	77,579	77,277	77,800	78,936
L - Real estate activities	44,248	44,183	44,646	44,784	45,750	46,498	46,974
M - Professional, scientific and technical activities	145,779	149,179	152,530	155,025	160,602	166,296	169,987
N - Administrative and support service activities	128,323	130,345	134,697	142,004	146,420	152,416	155,621
O - Public administration and defence; compulsory social security	142,314	140,501	139,034	135,164	135,159	136,728	139,138
P - Education	219,181	219,105	223,273	227,183	231,562	230,554	230,626
Q - Human health and social work activities	509,915	507,380	509,021	506,430	506,480	506,763	511,159
R - Arts, entertainment and recreation	49,152	49,190	50,534	51,587	52,907	54,463	56,719
S - Other service activities	73,449	72,637	72,579	73,326	73,520	74,393	75,256
T - Activities of households as employers	-	-	-	-	-	-	-

[7] Latest available data.

U - Activities of extraterritorial organisations and bodies	-	-	-	-	-	-	-
X – Activity not stated	619	4,197	4,352	4,388	3,783	3,836	3,723
Please indicate the source	Statistics Denmark (NSO): http://statistikbanken.dk/ras301 T and U are not specified in the available statistics						

The sector experiencing the highest growth is 'Accommodation and food service activities', growing from 89,327 in 2010 to 106,677 (19.4%) in 2015. Also 'Administrative and support service activities' (from 128,323 to 146,420) and 'Professional, scientific and technical activities' (from 145,779 to 160,602) have experienced double-digit growth. 'Mining and quarrying' has on the other hand experienced the largest relative fall (-14.4%) in employees from 4,925 (2010) to 4,215 (2016).

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3

THE NATIONAL SPORT AND PHYSICAL ACTIVITY SECTOR

3. THE NATIONAL SPORT AND PHYSICAL ACTIVITY SECTOR

Presentation of the characteristics, evolution and future perspective of the national sport and physical activity sector/system

a) Characteristics, evolution and future perspectives

The purpose of this section is to provide a broad overview of the general characteristics of the sports sector in Denmark. What is the role of the Danish government, who are the main stakeholders, what does the environment for professional sports looks like, and what characterises the participation and use of facilities in professional and grassroots sports?

b) The national sport system

The volunteer non-profit clubs as well as P.E. in primary schools play substantial roles in organised sport. Today, public schools are obliged by law to ensure that children get a minimum of 45 minutes of physical activity per day, and since the mid 1970's focus has expanded to other societal elements to which sport and physical activity contribute, such as health and social aspects (Ministry of Culture, 2009). Although sport serves under the Ministry of Culture, it also influences policy areas serving under other ministries focusing on health and societal aspects (Ministry of Culture, 2016).

1) The role of the government

Although a formal policy for sport exists, there is no comprehensive strategy at the government level. Traditionally, the role of the government has been to support participation in the volunteer non-profit clubs through umbrella organisations. However, because of the growing political interest for sports, new organisations have emerged (Ministry of Culture, 2009).

Today there are two large umbrella organisations: (1) the National Olympic Committee and Sports Confederation of Denmark (DIF) and (2) Danish Gymnastics and Sports Associations (DGI), and one smaller umbrella organisation: Danish Company Sports Federation (DFIF).

DIF is responsible for both elite and amateur level/recreational sports at a non-profit association level and is further responsible for the Danish participation in the Olympics, while DGI focuses on community-oriented amateur-level/recreational sports. DFIF works to stimulate the interest in sport and exercise through the workplace. This is done through non-profit company sports clubs and by health initiatives and campaigns at the workplace.

Historically, there has been a high level of autonomy in sports with limited government interference. However, in 2014 the political parties reached a 'Political Agreement on Sport' (Ministry of Culture, 2014a) building upon the '25-50-75' strategy set by DIF and DGI: That by 2025, 50% of the population should be a member of a non-profit sports club, and 75% should be physically active. The political parties agreed that the national sports policy should be based the voluntary sector, and hence the umbrella organisations and non-profit clubs, with basis in the ´25-50-75´ strategy (Ministry of Culture, 2014a).

This may indicate a turning point in the governmental involvement, and Pilgaard (2019) asks:

"By supporting the strategy, the State implicitly sends a signal expecting that the voluntary organisations take responsibility for the general physical activity level and health of the population. This is an interesting paradox, because the government generally seeks to keep an arm's length to the work of the voluntary sector without interfering with how the governing bodies of the organisations manage the financial support from the state. "

The policy outlined by the Ministry of Culture is:

- to strengthen the sports movement in all its diversity
- to strengthen the opportunities for the population with special focus on children and young people to engage in sports and exercise in all contexts
- to support sports culture in associations
- to create a strong elite sport environment in Denmark
- to combat doping broadly as well as at the elite level (Ministry of Culture, 2014a)

2) Recipients of National Lottery Funds

In line with the above-mentioned points, the government subsidises the sports sector by allocating the profits from the state-owned gambling company (National Lottery Funds) to key stakeholders by a distribution key fixed by law. The bulk of the funds goes to eight institutions within the area of sports with the two largest umbrella organisations (DIF and DGI) receiving the largest share. The other recipients are the third umbrella organisation, DFIF, and five other institutions within sports:

- *Team Denmark* is an autonomous state organisation, which, according to the 'Elite Sport Act', has the purpose of developing Danish elite sports in a socially and ethically balanced manner. In cooperation with DIF and their 62 underlying sports federations, as well as other relevant partners, it is up to Team Denmark to ensure improvement, coordination as well as increasing efficiency of the conditions for elite sports athletes (Ministry of Culture, 2013).
- *The Danish Foundation for Culture and Sports Facilities (LOA)* provides counselling and co-financing in the development of creative solutions for sports facilities and arenas within sports, culture and leisure projects.
- *Anti-Doping Denmark's (ADD)* purpose is – according to 'Law on the promotion of integrity in sport' – to fight the use of doping and strengthen the core values in elite sports and in general. Anti-Doping Denmark cooperates with the World Anti-Doping Agency (WADA) and other international institutions. ADD further manage the secretariat for match-fixing (Ministry of Culture, 2015).
- *Sports Event Denmark's* purpose is to attract, organise and develop international sport events in Denmark.
- *The Danish Institute for Sports Studies (Idan)* is an independent research centre originally set up by the Ministry of Culture. The primary objective of the organisation is to initiate and develop a broad range of social science research projects in the field of sports. Furthermore, its aim is to analyse political initiatives and stimulate public debate related to these initiatives.

c) The municipalities

In addition, 'the Act on Non-Formal Education and Democratic Voluntary Activity'[8] commits the municipalities to provide facilities and economic support to activities of non-profit sports clubs, non-formal adult education and voluntary activities in democratic associations. The individual municipality sets the framework within the boundaries of the Act of Non-Formal Education and Democratic Voluntary Activity, which is why there are large policy differences across the 98 municipalities. It is the municipalities that generate the greater part of the public funds invested locally in sports and physical activity settings.

The minimum demands of the Act of Non-Formal Education and Democratic Voluntary Activity is, however, limited and many municipalities provide noticeably more funding than what is demanded by law

[8] https://www.retsinformation.dk/Forms/R0710.aspx?id=202909

(Thøgersen, 2017). This can be explained by traditions, special municipal provisions and local benevolence towards sport, and today sport and physical activity is considered a part of traditional welfare (Mortensen, 2004).

The municipal support for sport and physical activity is centred around sports complexes and facilities, and the largest share of the municipal expenses (for sports and physical activity) are channelled towards this area (Ministry of Culture, 2014b; Ottesen & Ibsen, 2000; Wøllekær, 2007). According to a study by Forsberg, Iversen and Høyer-Kruse (2017) surveying 50 municipalities, 82% stated to have a sports policy, while 34% had a facility policy.

d) Professional sport in Denmark

The most commercialised sport in Denmark is (male) football followed by handball, ice hockey and basketball. Basketball and ice hockey can also be considered commercial, but at a much lower level, and the most prolific basketball club and league winners in 2016/17, Bakken Bears, had total personnel costs of approximately €1.2 million, while the ice hockey club with the highest personnel costs paid approximately €1.1 million to players and staff.

In 2015/16, the 12 clubs in Superligaen (the Danish first tier in football) had a turnover of approximately €363 million including non-sports related activities (Storm & Nielsen, 2017) with total personnel costs of €103 million (Nielsen, 2017a). Most first team players, with few exceptions, hold full-time contracts. In comparison, the personnel costs of the second tier amounted to approximately €19 million (12 clubs) with a higher proportion of semi-professional players (ibid). In general, many young low-income players also study and receive educational financial aid (SU) in addition to the salaries paid by the clubs. This is the case for many young athletes across sports.

The financial power in the first tiers of handball (male and female) and ice hockey (male) is small in comparison to football. In 2015/16, the handball leagues had a turnover of €24 million (male league has 14 clubs) and €11-13 million (female league has 12 clubs) (Storm, 2017) with total personnel costs of €17 and €9 million, respectively (Nielsen, 2017b).[9] The environment in these leagues is similar to the second tier in football, where some players are employed full-time, while others hold semi-professional contracts or even play as amateurs.

Some top athletes based in Denmark live as full-time professionals as they get their primary income from prize money and sponsorship deals, however, without being employed on full-time contracts. Further, there are some – but few – athletes employed on full-time contracts within swimming, cycling, basketball, volleyball and motor sports, while there are semi-professionals athletes in badminton, graeco-roman wrestling and table tennis. Many elite athletes outside the commercialised sports compete as amateurs.

Moreover, Team Denmark assists elite athletes in their sporting development, and in few cases they also provide direct financial support to low-income amateur elite athletes. Team Denmark divides athletes into three categories based on their sporting merits. The best performing athletes have direct access to Team Denmark's expert services within sports medicine, physiology and psychology and other services related to education, housing and dining arrangements and physical training facilities.

Since 2013, the Danish Institute for Sports Studies has surveyed all athletes in the Team Denmark programme focusing on their general satisfaction. Although having a high level of overall satisfaction, many express concerns regarding their financial situation. One out of four state that they have to take out a loan to finance their elite career, while more than half state that they receive financial support from their family

[9] We have no comprehensive data on ice hockey and basketball clubs.

and/or friends (Storm, Rask, & Holskov, 2016). According to Team Denmark's website, 1,065 athletes are included in the Team Denmark programme at different levels (Team Danmark, 2018).

e) Denmark's competitiveness in an international perspective

Football is the most popular spectator and TV sport. The most remarkable achievement by the Danish national football team was winning the European Championships (EC) in Sweden in 1992. The best result at a World Cup (WC) was in 1998, where Denmark reached the quarterfinals. Furthermore, in 1995 Denmark won the Confederations Cup (at that time King Fahd Cup). Since the qualification to the EC in 1984, Denmark has qualified to the EC in 1988, 1992, 1996, 2000, 2004 and 2012 and to the WC in 1986, 1998, 2002, 2010 and 2018. Denmark is currently placed 10 (May 2019) on the FIFA World Ranking, which is the best position since 2011 (ranked 11).

Qualifying for a European group phase (four Champions League and seven Europa League) in 12 of the last 13 years (2018/19) including a Champions League 1/8-final in 2010/11 and a Europa League 1/8-final in 2016/17, FC Copenhagen is the locomotive of Danish club football. Other Danish clubs have enjoyed occasional success as well progressing from the group phases. The most remarkable result by a Danish club was in 1990/91 when Brøndby IF – the international locomotive at that time qualified for the semi-final in the UEFA Cup. Denmark is currently ranked 16th in the UEFA Country Ranking (May 2019).

Historically, Denmark has also enjoyed great success in badminton and is the third most successful nation at the World Championships (and current titleholder in men's single) and fourth at the Olympics. In recent years, Denmark has also achieved international results in women's tennis with Caroline Wozniacki winning Australian Open in 2018 as the highlight. Until 2012, Mikkel Kessler was a dominating figure in professional boxing's Super Middleweight Class and two times WBC and WBA champion, and in 1996, Bjarne Riis won the most prestigious cycling race, the Tour de France, but was later stripped of the title after admitting using doping.

Since 2013, the Danish Institute for Sports Studies has evaluated the Danish competitiveness in the Summer and Winter Olympic disciplines based on top-8 placements. Denmark does not have a strong tradition within Winter disciplines, however, has occasionally performed well within curling and further has top-8 placements within ice hockey and speed skating.

Traditionally, Denmark has accumulated most (top-8) points within swimming, badminton, cycling, rowing and sailing at the summer Olympics (Storm & Nielsen, 2018). Moreover, Denmark is one of the top nations in men's handball and reigning Olympic champions from 2016 and World champions from 2019. Denmark furthermore won the European Championship in 2008 and 2012. From 1994-2004 the women's handball team enjoyed great success with three Olympic titles, three European Championship and one World Championship.

f) Participation in sport and physical activity

The Danish Institute for Sports Studies conducted representative surveys of leisure time sport and exercise among Danes (children aged 7-15 and adults aged 16 and over) in 2007, 2011 and 2016 (Pilgaard & Rask, 2016).[10] This chapter is snippets from an English wrap up of the paper (Pilgaard, 2019).

[10] In 1964, 1975, 1987, 1993 and 1998 similar surveys were conducted by the Danish National Institute of Social Research (among adults aged 16 and over).

1) Current participation

The most recent survey from 2016 reveals that 61% of adults and 83% of children answered 'yes' to the question 'Do you normally participate in sport/exercise?'. Teenagers (16-19 years) and younger adults (aged 20-39 years) are especially likely to drop out of sport or exercise activities and put active leisure time on hold for a while. This results in a response of 'yes, but not at the moment' rather than 'yes' when people in this life-stage answer the question 'Do you normally participate in sport/exercise?'

Table 3.1: Do you normally do exercise/sports? Children (%)

n = 3,221	Total	Gender		Age		
		Boys	Girls	7-9 years	10-12 years	13-15 years
Yes	83	83	82	85	86	76
Yes, but not at the moment	9	9	9	7	8	13
No	8	8	9	8	6	11

Table 3.2: Do you normally do exercise/sports? Adults (+16) (%)

n = 3,914	Total	Gender		Age						
		Women	Men	16-19	20-29	30-39	40-49	50-59	60-69	70+
Yes	61	62	61	61	61	57	62	62	66	61
Yes, but not at the moment	14	16	13	22	19	17	14	14	10	8
No	25	23	27	17	20	26	24	25	25	31

The survey further included a list of activities that the respondent could tick off if they had participated in a sport regularly within the past 12 months[11] - respectively 95% of children and 82% of adults ticked off one or more sports. On average, active children (the 95% that had taken part in at least one activity within the past year) spent 5 hours and 3 minutes per week doing leisure time sport and exercise in 2016. The active adults (the 82% that had taken part in at least one activity within the past year) average time use per week was 4 hours and 31 minutes. Most active children (69% of 95%) and adults (61% of 82%) are active at least three times per week.

2) Popular activities

Adults most frequently participate in individual fitness-like activities such as strength training, running, walking, swimming and spinning (see table 3.7.3). The tenth most popular activity overall, football, is the largest team sport among adults.

Table 3.3: The 15 most popular sports among adults (%)

n= 3,914	Total	Sex		Age						
		Women	Men	16-19	20-29	30-39	40-49	50-59	60-69	70+
Strength training	30	28	31	52	50	29	30	27	16	17
Running	29	29	30	43	43	41	39	30	13	3
Hiking	25	29	22	12	18	17	19	31	40	34

[11] 'Regular' is not defined further in the questionnaire but is added in an attempt to avoid people from clicking activities they only tried once or twice.

Swimming	15	16	14	13	16	17	15	13	13	15
Spinning	11	11	11	7	12	11	11	15	10	7
Yoga (and similar)	9	15	2	7	9	10	9	9	9	6
Cycling	8	5	11	4	5	8	8	10	10	7
Gymnastics	8	13	4	10	3	3	2	6	15	22
Skiing/snowboard	8	7	9	10	8	8	9	10	7	4
Football	7	1,5	13	26	14	9	6	4	1,7	0,8
Aerobic (and similar)	7	13	1,2	8	14	7	9	6	4	3
Badminton	6	4	7	9	7	4	5	6	6	6
Mountain bike	6	3	10	7	4	10	9	8	4	1,2
Other fitness activities	5	6	4	3	5	3	4	6	7	6
Golf	4	3	6	2	1,5	1,4	3	3	10	7
No activity	18	17	18	11	15	19	18	18	18	21

Women and men tend to engage in different kinds of activities with yoga, gymnastics, dancing, Pilates, Nordic walking and horseback riding as the most popular for women, while men's preferred activities are cycling, mountain biking, soccer, badminton, golf, angling, hunting, tennis and bowling. The most popular activities – strength training, running, walking, swimming and spinning – tend to be popular among both genders.

Football is the most popular sport among children and 37% of all children have participated in football on a regular basis within the past 12 months (see table 3.4). Children also cluster around activities such as swimming, gymnastics, running and trampolining, the latter being most likely to take place at home on garden trampolines.

Table 3.4: The 15 most popular sports among children (%)

n = 3,221	Total	Sex		age		
		Boys	Girls	7-9	10-12	13-15
Football	37	53	20	35	39	35
Swimming	35	32	38	50	38	17
Gymnastics	24	13	34	32	24	16
Running	18	19	16	11	17	27
Trampoline	17	17	17	20	20	11
Scooter (toy)	15	18	12	24	16	5
Handball	13	12	14	11	15	13
Strength training	12	12	11	1	6	29
Dancing	12	2	22	11	14	10
Scout	11	12	10	14	12	6
Badminton	9	10	8	6	11	10
Roller skating	8	5	12	11	8	6
Horse-riding	8	1	15	8	10	7
Martial arts	7	8	5	6	6	7
Skateboard/waveboard	6	9	3	6	7	6
No activity	5	5	5	5	4	6

As with adults, Danish boys and girls seem to engage in different kinds of activities. More than twice as many boys play soccer compared to girls (53% vs. 20%) although soccer is the fourth largest activity among girls. Boys also outnumber girls in street sport activities like skateboarding, scooters (toy) and parkour, as well as in mountain bike, angling, basketball, table tennis, and shooting. On the other hand, girls gather around gymnastics, dancing, roller skating and horse-riding.

In terms of overall categories, adults are most likely to take part in 'individual exercise', while traditional club sports remain the largest group of activities among children. In general, children tend to drop out of many of the conventional team sport activities during adolescence and change to fitness-like activities.

3) Trends and tendencies

The sports participation development in Denmark has been an uninterrupted growth story in recent decades. However, the latest nationwide survey from 2016 revealed a preliminary saturation point in the overall level of participation among both children and adults. Distributed by age groups, trends indicate lower participation levels for people younger than 50 years than previously, while age groups over 60 years continue to report increasing participation levels (see table 3.5).

Trends over time also tell a story about equalisation of gender differences. Women used to be rare participants in sport or exercise, but during the 1980s and 1990s women caught up. In the new millennium Danish women outnumber men when it comes to the proportion involved in leisure time sport or exercise. Among the Danes who participate in sport or exercise, however, men tend to spend more time than women do. In addition, men and women, girls and boys, still tend to be found in gender-stereotypical male/female sporting domains.

Table 3.5: Participation in sport/exercise among Danish adults (16 years and above) and children (aged 7-15 years) according to gender and age (%)

	1964	1975	1987	1993	1998	2007	2011	2016
Total	15	29	43	46	50	56	64	61
Female	10	27	42	47	51	58	65	62
Male	20	32	43	47	50	53	63	61
16-19 years	53	56	61	67	67	63	67	61
20-29 years	27	42	49	56	59	58	67	61
30-39 years	17	41	46	49	52	47	63	57
40-49 years	10	27	44	48	50	54	64	62
50-59 years	5	21	31	42	46	55	63	62
60-69 years	3	13	31	33	47	63	65	66
70 years+	2	12	27	22	37	58	58	61
Total (children 7-15 years)					89	84	86	83
Boys					87	85	84	83
Girls					91	83	87	82

The large group of adults and elderly entering sport in the years leading up to the millennium resulted in increased participation rates in most activities. This was especially true for the most popular adult activities, such as individual exercise and fitness, which have grown so rapidly that they can be seen as mega trends. Only strength training, yoga and cycling continue to gain ground in participatory terms, while all other such individual activities, even running, peaked in either 2007 or 2011.

The lower participation level among teenagers (16-19 years) and younger adults (20-39 years) can be explained by an increased tendency over the years to answer 'yes, but not at the moment' instead of 'yes' when asked about their participation. This indicates that it is rather typical that young adulthood is a stage in life where active engagement in sport and exercise is put on hold. An important question in this regard is whether those people are able to enter the sporting scene of active participation again later in life. A cross-sectional data view from 2016 indicates that some will manage to do so since the participation level is higher among age groups older than 40 years than among younger age groups. Further, there are activities with a rather low average (3-5) years of participation among adults indicating that people take up new activities in adult life. Good examples of such activities are yoga, Pilates, mountain bike, triathlon, crossfit or stand up paddle boarding (Pilgaard & Rask, 2016). However, it is not certain to which extent the pattern with higher participation rates among older age groups in 2016 is due to life phase trends. It may as well be a generational effect meaning that the new generations will come out with a lower tendency to participate in sport and exercise compared to their predecessors causing the overall participation level to decrease in the years to come.

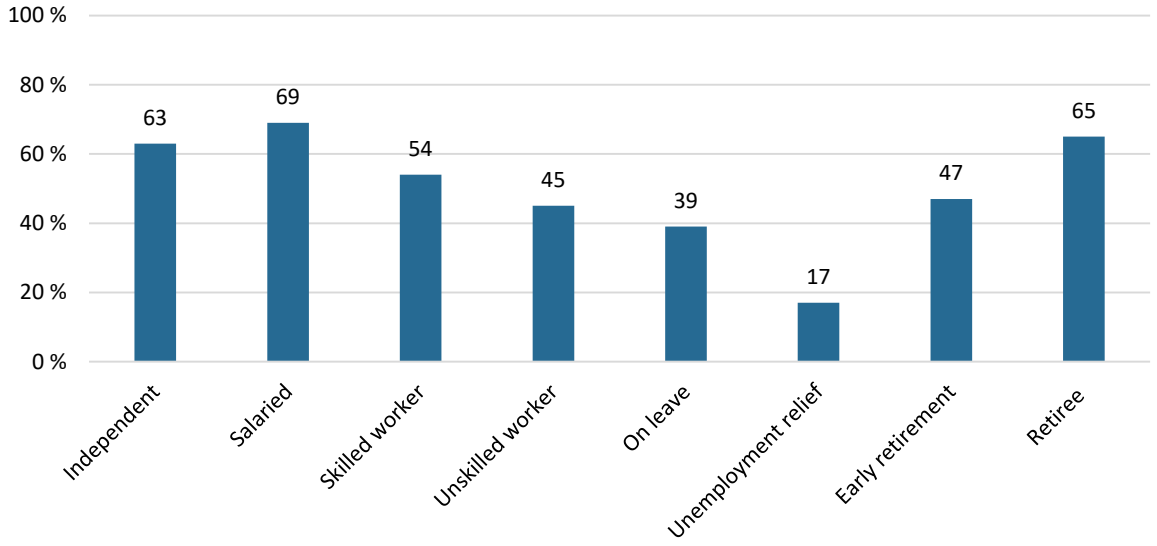
Further, team ball games – and individual ball games, in particular – lose popularity with less Danes taking part in such activities in 2016 compared to 2011 and 2007. At the same time, new activities arise that have not previously been included in sports studies and therefore cannot be described with overall development features. Examples of such recent added activities include mountain biking, parkour and triathlon/duathlon, which were added to the 2011 sports survey, while crossfit, diving/underwater hunting, floorball, open water swimming/coastal life and stand up paddling are examples of new activities in the study from 2016. Common to many of the more recent activities is the opportunity to practice them in an informal setting outdoors in the city or nature, individually or together with others.

4) Barriers to participation

Over time there has been a levelling out in terms of the impact of age and gender on sports participation in Denmark. However, level of education remains a strong indicator of the tendency to participate in sport and exercise and the tendency to participate in sports increases with education level. Between 2007 and 2016, the difference between educational groups in participation level has basically remained the same. Prior to 2007, the statistical material shows similar trends with regard to educational level, but is not included in the figure since the educational categories have been modified over time (Fridberg, 2000; Pilgaard, 2012).

In this regard, it is worth noting that the general education level in Denmark has risen over time, meaning that the groups with lower educational levels are getting smaller. This means that the challenges of social division among the Danes according to sports participation has changed even though the statistical material of differences between educational groups show close to no change over time. The inactive group is getting smaller, but possibly also more socially vulnerable. This becomes visible when looking into sports participation levels among different occupational groups. As figure 3.1 shows, participation levels drop remarkably among adults *outside* the labour marked.

Figure 3.1: Participation in sport among adult Danes (16 years and above) according to current occupation in 2016 (%)



Ethnicity is also a strong source of social division in terms of differing activity levels in Denmark. People born in Denmark or other European/western countries are more likely to participate in sport or exercise than people born elsewhere.

The social divisions in sport and exercise among adults shine through in the patterns of children's participation, which seem to mirror their parent's leisure time exercise habits (see table 3.6). This is especially true for girls. If both parents are born outside of Europe, if both parents are unemployed, or if no other family member is engaged in sport or exercise, girls are less likely to engage in sport. Among boys, the importance of ethnicity diminishes if the parents either work or participate in sport or exercise themselves. In general, this shows that girls seem to be more vulnerable to social conditions than boys.

Table 3.6: The social divisions in sport and exercise among adults shine through in the patterns of children's participation

	Total	Sex		Age		
		Girls	Boys	7-9 years	10-12 years	13-15 years
Both parents born in DK (n=2.668)	84	84	85	87	88	78
Parents born in DK or elsewhere in Europe (n=249)	79	83	75	86	79	72
Parents born in DK/Europe and non-European country (n=154)	76	74	78	70	85	73
Both parents born outside of Europe (n=140)	61	43	73	69	57	59
Both parents employed (n=2.762)	85	85	84	87	88	78
One parent employed (n=382)	73	71	75	76	75	67
None of the parents employed (n=52)	60	53	63	60	60	61
Other family members are engaged in sport (n=2.972)	85	84	85	87	88	79
None of the family members are engaged in sport (n=248)	57	58	57	64	62	47

5) Organised club sport

According to Pilgaard and Rask (2016) most of the active children (86%) surveyed were members of a non-profit sports club, while it was 39% among active adults.

Based on registrations in Centralt Foreningsregister (a system where clubs register their members) there were 11,665 non-profit sports clubs across the three umbrella organisations (DIF, DGI and DFIF) with 2.6 million members (of a population of 5.7 million) in 2018 (Centralt Foreningsregister, 2019). However, these are memberships and not individuals[12], and hence it is uncertain how many Danes are actually members of a non-profit sports club. According to Centralt Foreningsregister, football is the most popular club sport with 366,426 (non-unique) members followed by gymnastics (310,414), swimming (230,841) and non-commercial fitness (210,111), golf (159,299), badminton (130,709), and handball (108,555).

g) Arenas for sport

In the 2016 sports participation survey, the respondents also answered questions regarding their use of different facility types and arenas for doing sports (Pilgaard & Rask, 2016).

The classical facilities such as large (53%) and small (42%) sports halls, football pitches (37%) and indoor swimming pools (36%) are popular among children, but at home (in the garden) is also an arena where many children do sports and physical activity (31%).

The public space is furthermore a popular arena. Almost one out of three children (28%) use nature (28%) and streets/roads/pavements etc. (29%). Fitness centres/gyms (commercial and non-commercial) are less commonly used by children (10%), however, with large differences across age groups. While the 7-9 (2%) and 10-12 (5%) year-olds use of fitness clubs/gyms is very limited, one out of four (25%) young teenagers (13-15-year-olds) exercise there.

Overall, adults use the classical sports facilities to a much lesser extent than children, which reflect their choice of sport/physical activity. Instead, they use the public space where nature (44%) and streets/roads/pavements etc. (35%) are the most popular places to exercise. Fitness clubs/gyms (34%) are also popular arenas for doing exercise, and the most popular among the under-30-year-olds. Just over half in this age group use this type of facility. The use of fitness clubs/gyms has almost doubled from 19% in 2007 to 34% in 2016 (2011: 24%).

The commercial fitness clubs do not report their member base, however, a report from 2016 estimated that between 811,000-951,000 Danes were members of a commercial fitness club – an estimated increase from approximately 550,000 in 2009 (Storm, Toft & Bang, 2015).

1) Owners and operation of sports facilities

Forsberg et al. (2017) divide sport complexes into four main types: (1) Municipalities, (2) schools, (3) autonomous, and (4) complexes run by non-profit sports clubs.

(1) Complexes which are run by the municipalities are typically managed by the municipal leisure department or similar. Often, the complexes are established to facilitate activities within the non-profit sports clubs with the municipality bearing the operational costs of the facilities and managing the staff. The municipality has the authority over the facilities and can organise and control them according to what they find suitable.

[12] A person who is a member of both a football club and a handball club will count for two persons

(2) Complexes managed by public schools do not have volunteer sport as the primary function, but use the facilities for P.E. and other school purposes during the school day. From the afternoon non-profit sports clubs are the primary users. The sports facilities on schools are managed by the municipal leisure department or similar in cooperation with the individual school or school department. Typically, the school runs the facility. 86% of the 50 municipalities who participated in the study provided economic support to this facility type.

(3) The autonomous complexes can be divided into for-profit and non-profit with the board as the highest authority. These complexes typically emerge from private initiatives, and even though the municipality provides economic support (typically this is done by direct subsidies and/or indirectly through subsidies to the volunteer sports clubs renting the facilities) it does not in theory decide how the facilities are run and managed. However, in practice the municipalities are to some extent able to influence the management of the facilities through formal and informal channels. 76% of the municipalities provide economic support to autonomous non-profit complexes, while 40% provide economic support to the autonomous for-profit complexes.

(4) Some complexes are owned by the local sports clubs, taking the initiative to establish the facility. Like it is the case with the autonomous complexes, the highest authority is the board. Even though the municipalities provide substantial economic support to these types of constructions, they do not decide how they are operated, but can in practice influence the operation through the same means as in the autonomous facilities. 47% of the municipalities provide economic support to this facility type.

25% of sport complexes in Denmark are run by the municipalities, while 22% are run by schools. Autonomous for-profit (10%) and non-profit institutions (27%) run 37% of the complexes, while a few are run by sports clubs (8%) and other types of constructions (8%).

Stand-alone-facilities (sports halls, football pitches, swimming pools and tennis courts) are typically also run by the above-mentioned actors. Outside access-for-all facilities such as skate and parkour facilities, multipurpose pitches, sports playgrounds etc. are typically run by the municipalities.

In 2017, The Foundation of Culture and Sports Facilities and the Danish Institute for Sports Studies launched a facility database mapping 15 of the most commonly used sports facilities in Denmark.

The most common facilities in larger sports complexes are sports halls in different sizes and football pitches, however, some complexes also have indoor swimming pools, in-/outdoor tennis courts and/or fitness rooms.

Fitness clubs/gyms are primarily privately owned (58%) and operated (59%), however, many gyms, typically located in sports complexes, are owned by the municipality or an autonomous organisation, but run by non-profit sports clubs (25%).

The increasing popularity of fitness is also reflected in the supply of commercial fitness centres, which have experienced rapid growth of approximately 88% since 2010 (2017) from 459 (Toft & Wittig, 2016) to 865 (facilitetsdatabasen.dk, October 2019). In addition to the commercial centres, 544 non-commercial fitness centres exist across Denmark.

Golf facilities (197) are typically privately owned (46%) or owned by a non-profit sports club (36%). Non-profit sports clubs operate more than half (57%) of the Danish golf facilities, while one out of three (35%) is privately run.

59% of the 580 riding facilities are privately owned, while 48% are operated privately. Although it is only 12% that are owned by non-profit clubs, more than one out of four is run by the clubs.

Most tennis facilities are owned by a sports club (outdoor: 41%; indoor: 36%) or the municipality (43%; 31%), while most are run by sports clubs (68%; 54%). For other common facilities such as sports halls, athletic facilities, football pitches, and swimming facilities, it is typically the owners who run them

Overall, the database shows that there are more people per facility in larger cities, but that they also live closer to the facilities than people, who live in the outskirts of Denmark. This may reflect a backlog in the larger cities, while it is also possible that there is an overcapacity in the rural areas (J. Toft, 2017).

2) Arenas for professional sport

Denmark's largest venue and only category 4 stadium (UEFA) is Parken (38,065 all-seater) in Copenhagen where FC Copenhagen and the (male) Danish national football team play their home matches. At the professional level, the football clubs FC Copenhagen and Brøndby IF are the only sports clubs that own their stadiums. All other professional sports clubs rent their facilities from the municipalities, who own the arenas. The Danish FA demands that all clubs in the first tier have a capacity of at least 10,000 with 3,000 seats, or 4,000 seated under roof, while clubs in the second and third tier must have a capacity of 4,000 (300 seats) and 1,500, respectively (Alm, 2014). In 2017/18 the average attendance in the Danish first tier was 5,881 (total: 1,470,300) while the second tier averaged 1,346 (total: 266,500) (Statistics Denmark, 2019a)

The largest indoor venue in Denmark is the Royal Arena in Copenhagen constructed in 2017. It can host up to 16,000 spectators (13,000 to a handball event and 12,500 to ice hockey), while Jyske Bank Boxen located in Herning (Denmark's 11th largest city in the centre of Jutland) has a capacity of 15,000 (12,500 to a handball event and 11,000 to ice hockey). The professional handball and basketball clubs use one or more arenas in the city in which they are based. The average attendance for the men's handball league (first tier) in 2017/18 was 1,883 (total: 418,000) while the women's league (first tier) averaged 1,233 (total: 207,100). The top basket league (male) had on average of 863 (total: 96,600) spectators (2017/18), while the ice hockey league had 1,421 (total: 457,700) attendees on average in 2017/18 (Statistics Denmark, 2019a).

ESSA-SPORT
Improving the Supply of Skills to the Sector

4 SPORT LABOUR MARKET STATISTICS

4. SPORT LABOUR MARKET STATISTICS

Analysis of the national sport and physical activity labour market based on analysis of available national statistics from the National Statistics Office and Eurostat.

a) Employment in sport and physical activity

This part focuses on employment in the sport and physical activity sector (NACE codes) based on register data (data on individuals) collated by Statistics Denmark. Only individuals with formal employment contracts are included.

b) Volunteers are important, but not included

Denmark has a long tradition of a well-developed civil sector and voluntarism plays a crucial role in the organisational setting of non-profit sports clubs (Ibsen, 2009). The boundaries between volunteers and paid staff is, however, vague. Some volunteers receive a non-taxable amount of reimbursement to cover expenses but are not employed by the club as such. Yet, volunteers account for most of the labour in non-profit clubs, and a study from Southern University of Denmark in 2015 estimated that approximately 540,000 individuals are volunteering in non-profit sports clubs, and that about 292,000 of those volunteer on a regular basis (Elmose-Østerlund, Pedersen, & Ibsen, 2017). In comparison, the study estimated that approximately 23,000 within the non-profit sport sector were paid for their services. These numbers are a bit higher than those collected by Statistics Denmark showing an employment rate of 23,553 individuals for the whole sports sector in 2015 (see figure 4.1 below).

c) Formal employment in sports and physical activity

'Arts, entertainment and recreation', in which '93.1 Sports activities' (organisations whose main business is classified as sport)[13] is classified under, made up 1.9% of the total employment in 2015. Of the 52,907 people employed in the sector, nearly half (23,533) were employed within sports activities (93.1) (see figure 4.1).

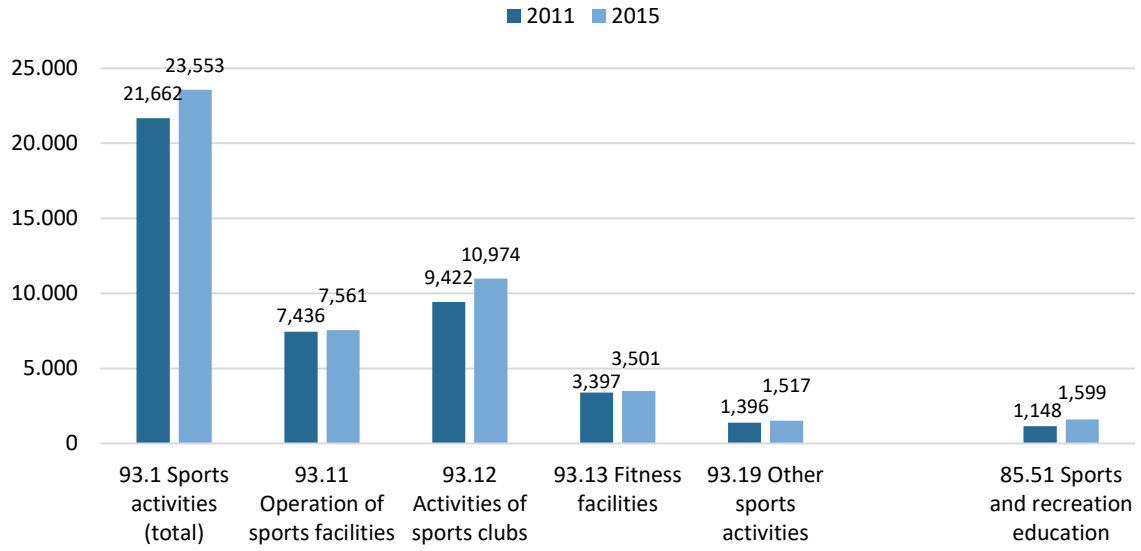
'Sports activities' is further divided into four subsectors: '93.11 Operation of sports facilities', '93.12 Activities of sports clubs', '93.13 Fitness facilities' and '93.19 Other sports activities'. Moreover, '85.51 Sports and recreation education' is featured under 'Education'. However, as physical education (P.E.) teachers in primary schools and high school (typically) also teaches other subjects they are not classified under '85.51 Sports and recreation education'. In 2015, 1,599 individuals were employed in this subsector.

Within '93.1 Sports activities 'sports clubs (93.12) make up the largest subsector accounting for nearly half (47%) of the total employment in the sector.

Since 2011, all subsectors have experienced growth and '93.1 Sports activities' has grown 8.7% (from 21,662 to 23,553 employees) in total, with activities of sports clubs (93.12) being the subsector with the highest growth (16.3%). Sports and recreation education (85.51) has grown from 1,148 to 1,599 employees (39.3%) since 2011.

[13] 93.1 Defines organisations whose main business is classified as sport.

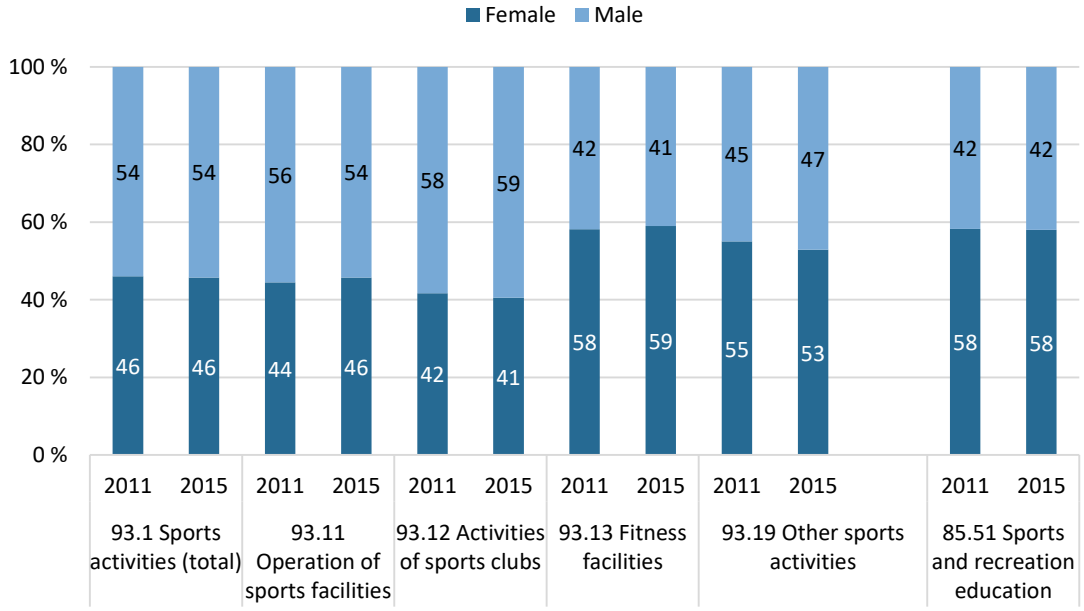
Figure 4.1: Employment across '93.1 Sports activities' and '85.51 Sports and Recreation Education'



d) Women and men (almost) evenly represented

Both genders are well represented in the sports sector (see figure 4.2), even though the sector employs more men than women. Sports facilities (93.11) and sports clubs (93.12) have a small overrepresentation of men, while there is a small overweight of women in fitness facilities (93.13) and in other sports activities (93.19) as well as in sports and recreation education (85.51). As it appears from figure 4.2, there is little variation in the representation of genders between 2011 and 2015. For an overview of the absolute numbers across genders see appendix 1, table 2.

Figure 4.2: Share of female and male employees in the sports sector (%)



e) Most part time jobs

The sports activities sector (93.1) is dominated by part-time employees, which in 2011 and 2015 made up 58% of all contracts (see figure 4.3). Hence, in 2015 13,727 of the 23,553 employees in the sector held a

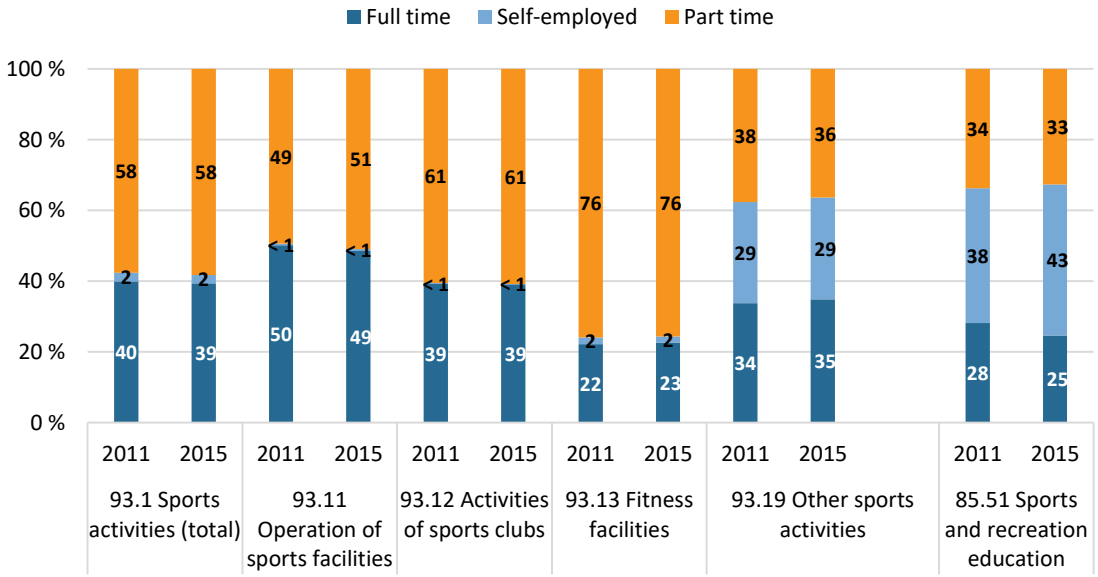
part-time contract, while 9,277 had a full-time contract and 549 were self-employed. (For an overview of the absolute numbers across types of contract see appendix 1, table 2).

According to the statistics collated by Statistics Denmark, 76% (2,649) of the individuals working in fitness facilities (93.13) held part-time contracts. This, however, contradicts a document from 2017 produced by *Dansk Fitness & Helseorganisation* (*DFHO*), the industry association of the fitness sector, and the Danish Chamber of Commerce. According to their report, there were 1,600 full-time employees in the fitness sector, equivalent to almost half (46%) of all employees (Dansk Fitness & Helseorganisation, 2017).

In sports clubs (93.12) three out of five (61%) employees hold a part-time contract. However, as mentioned, the majority of 'labour' in non-profit sports clubs are typically volunteers.

Operation of sports facilities (93.11) is evenly divided among part-time and full-time employees. Other sport activities (93.19) has a relatively large part of self-employed workers (29%) – in 2015, 437 of the 1,517 individuals working in the subsector were self-employed (93.19). Employees in 'Sports and recreation education (85.51)' are primarily self-employed and make up 43% (683) of the workers in the subsector in 2015 (against 38% in 2011).

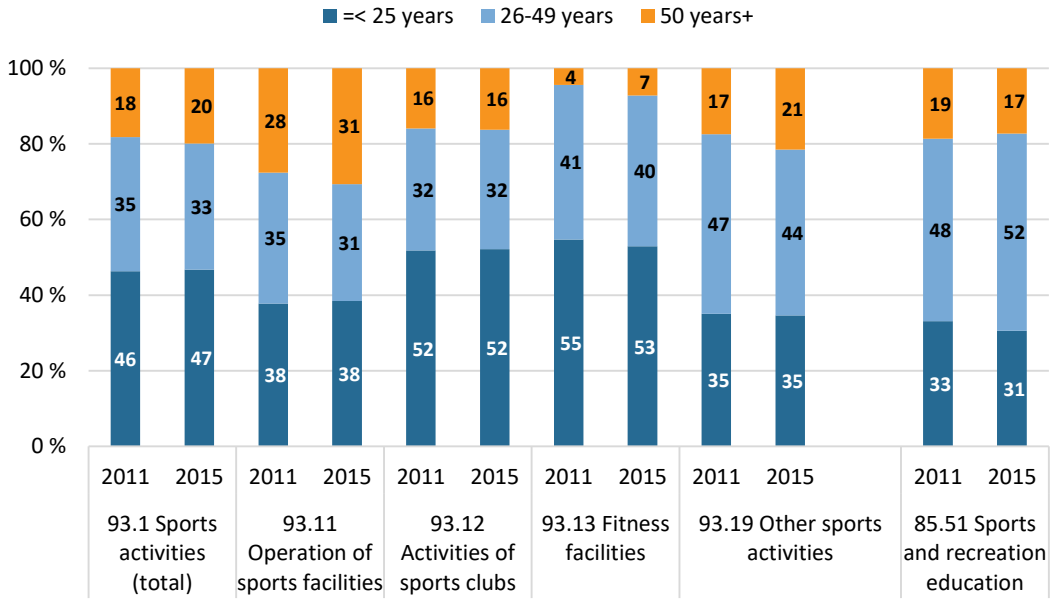
Figure 4.3: Share of full-time, self-employed and part-time workers (%)



f) Young people dominate the sector

In 2015, almost half (47%) of the employees within sports activities (93.1) were below the age of 26, while one out of five was 50 years or older. This was also the case in 2011. Especially fitness facilities (93.13) have few employees over the age of 50 (7%). On the other hand, almost a third (31%) of the employees working in the operation of sports facilities (93.11) is in this age group. Sports and recreation education (85.51) is dominated by the 26-49-year-olds, who in 2015 accounted for 52% of the employees (48% in 2011). For an overview of the total number of employees across age groups, see appendix 1, table 3.

Figure 4.4: Share of workers across age groups (%)



g) Lower and upper secondary education dominates

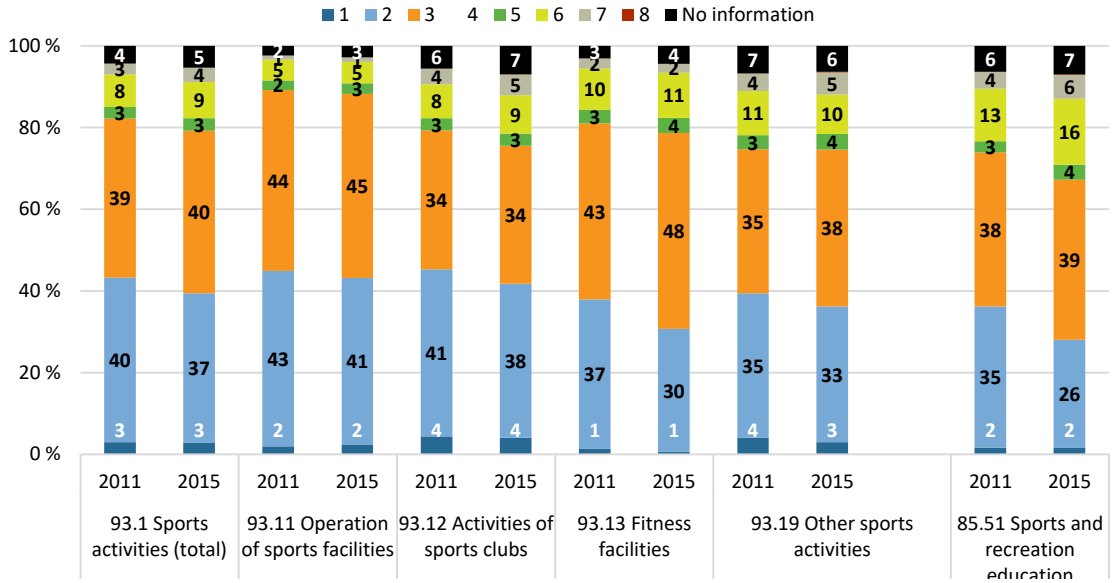
The International Standard Qualification of Education (ISCED) divides education into eight levels.[14] The general education level in the sports sector is relatively low and in 2015, more than three out of four (77%) employees within sports activities (93.1) had a no more than a primary or lower secondary education (79% in 2011).[15] There are relatively few employees with a higher education, and therefore few with a formal education within sport and physical activity. Yet, some general upper secondary educations (level 3) have incorporated sport management as a minor part of the curriculum.[16]

Although the formal level of education is a little higher in sports and recreation education (85.51) it is still dominated by employees with a primary (26%) and lower secondary (39%) education. For an overview of the total number of employees across education levels, see appendix 1, table 4.

Within the fitness sector, the education level is also relatively low, which is supported by DFHO, which states that "the fitness sector is characterised by a high degree of unskilled labour" and that the average full-time salary in the fitness sector in 2016 was approximately 79% of the average salary across all sectors (Dansk Fitness & Helseorganisation, 2017).

[14] ISCED Levels: level 1 – Primary education, level 2 – Lower secondary education, level 3 – Upper secondary education, level 4 – Post-secondary non-tertiary education, level 5 – Short-cycle tertiary education, level 6 – Bachelor's or equivalent level, level 7 – Master's or equivalent level, level 8 – Doctoral or equivalent level. In Denmark level four consists of only a few preparative courses for level 5-6 education.
[15] When sorting out individuals for which there exists no information, there is 81% which have a level 2 or level 3 education.
[16] No individuals within sports activities (93.1) and sports and recreation education (85.51) had level 4 education, and only a fraction had level 8 education.

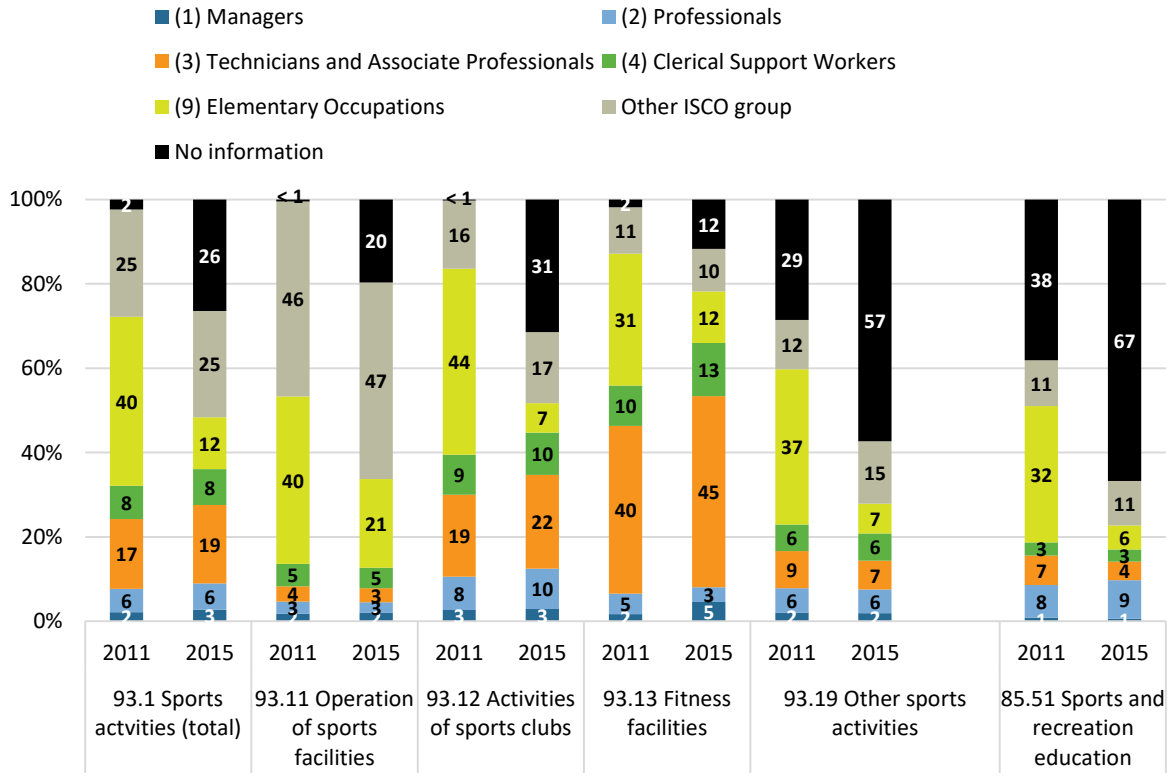
Figure 4.5: Share of workers across ISCED education levels (%)



h) Most people work in elementary occupations

The International Standard Classification of Occupations (ISCO) divides jobs into ten major groups. The following distinguish among (1) managers, (2) professionals, (3) technicians, (4) clerical support workers, (9) elementary occupation and 'other ISCO jobs'. Figure 4.6 shows that there is a high degree of missing information (no information) for sports activities (93.1) in 2015 and for sports and recreation education (85.51) in both 2011 and 2015 (for an overview of the total number of employees across occupation, see appendix 1, table 5).

Figure 4.6: Share of ISCO occupation (%)

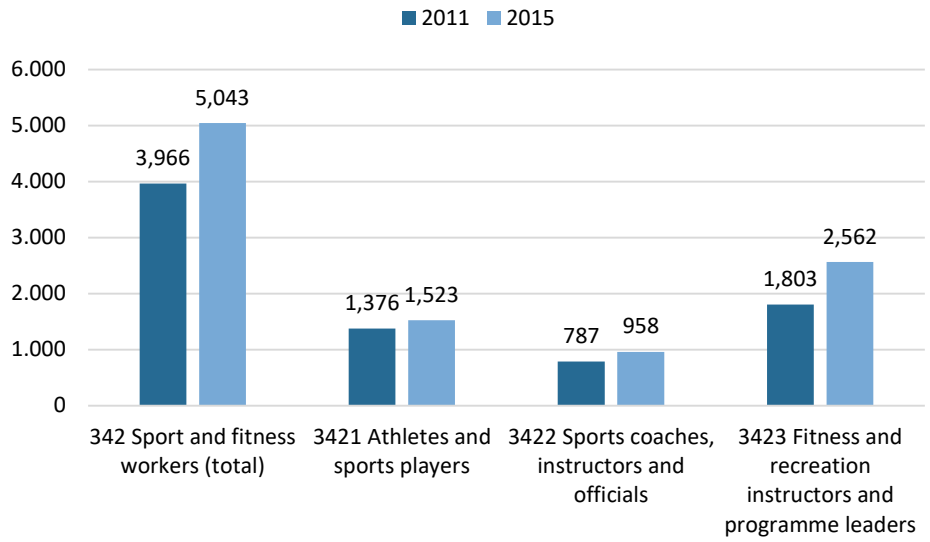


This clutters and complicates comparisons across periods. Yet, comparing 2011 and 2015 – keeping in mind that there in general is very little difference between the two years with regards to education level, age group, contract types and gender representation – it seems plausible that most individuals with 'no information' are employed in elementary occupations. Assuming that this is the case, there is little variation in the occupation between 2011 and 2015.

With 2011 as a baseline, sports activities (93.1) is dominated by (9) elementary occupations, which make up approximately 40% of all jobs, with (3) technicians and associate professional as the second highest occupation type (17%).

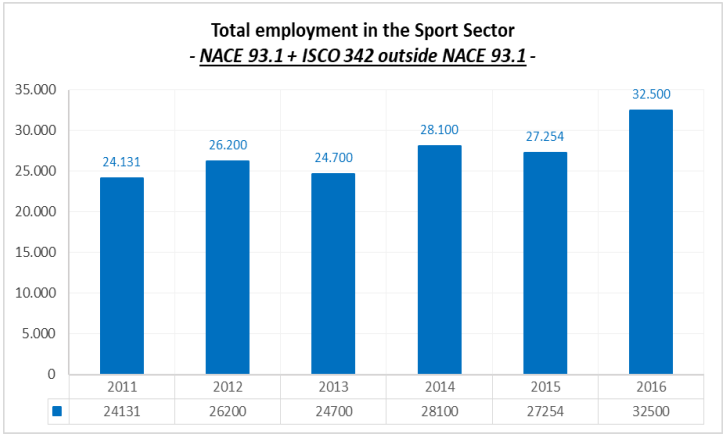
While a large part of the personnel across subsectors have (9) elementary occupations, (3) technicians and associate professionals counted for almost 45% (40% in 2011) of the personnel employed in (93.13) fitness facilities. In general, other occupations make up a small part of the total employment across subsectors in sports activities (93.1) as well as in (85.51) sports and recreation education.

Figure 4.7: Employment across subsectors in sports activities and sports and recreation



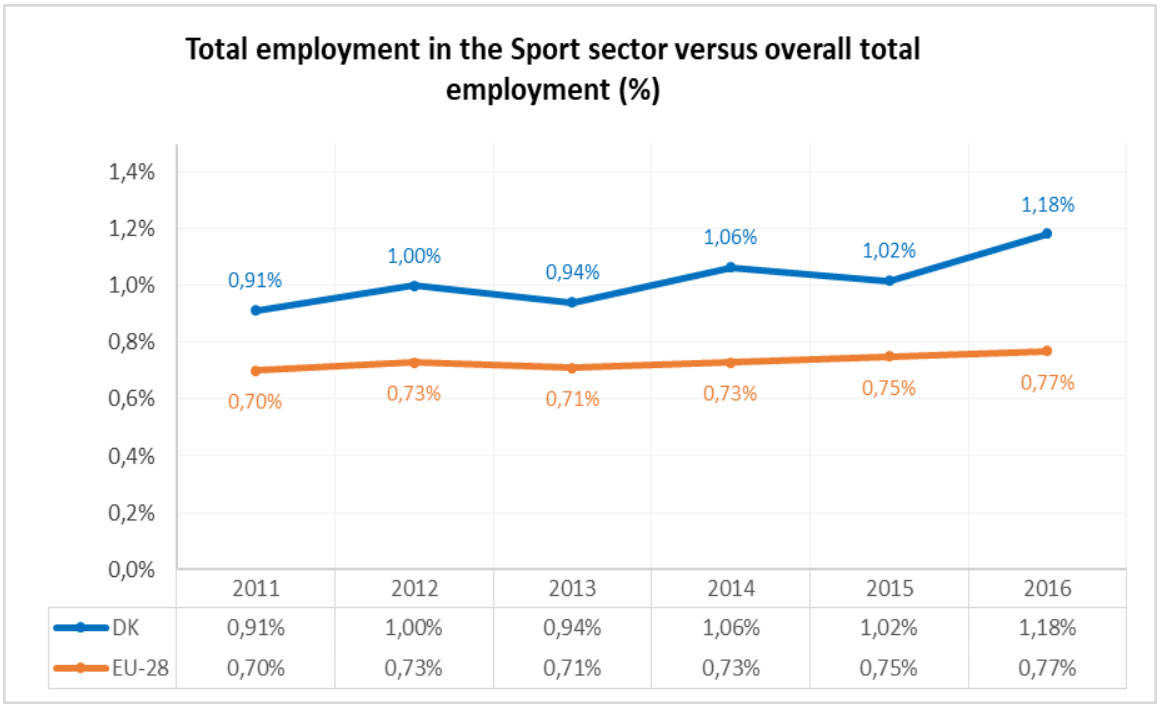
According to statistics from Eurostat, the total employment in 2016 in the sport sector was 32,500 (see figure 4.8). This is a 19% increase in employment within the sector since 2015.

Figure 4.8: Total employment in the Sport sector



However, although the sport sector is developing and growing, it is important to underline that the sector – in relation to the overall employment – is still relatively small (see figure 4.9). In Denmark the sector made up 1.2% of the total employment.

Figure 4.9: Total employment in sport sector versus overall total employment (%)



ESSA-SPORT

Improving the Supply of Skills to the Sector

5

NATIONAL EDUCATION AND TRAINING SYSTEM

5. NATIONAL EDUCATION AND TRAINING SYSTEM

a) The Danish education system

The Danish education system is primarily financed and owned by the state and the municipalities. Some institutions, however, are self-governing and receive state and municipal subsidies. The Ministry of Education is responsible for primary school (ISCED level 1 and 2) as well as upper secondary education (ISCED level 3), while higher education (ISCED 5-8) is under the Ministry of Higher Education and Science.[17]

The central government system is based on a taximeter system where the educational institution receives per capita grants based on the passing of exams, the specific subjects as well as the level of education. This means that a higher intake of students releases a larger grant, *ceteris paribus*. The schools' historical budgets are not taken into consideration when allocating funds (European Commission, 2018).

Furthermore, Danish students are entitled to a state educational grant (SU) as well as a state educational loan from the age of 18. Foreign citizens can apply for equal rules under certain conditions (Styrelsen for Institutioner og Uddannelsesstøtte, 2018).

b) Primary school

In Denmark, education is compulsory from the year the child turns six[18] until the child has finished 9th grade[19]. Public school is entirely financed through taxes with no user fees, while private schools are financed by state grants and tuition fees.

Although a majority of children (2016: 76.9%) are enrolled in a public school, the popularity of private schools is increasing. From 2007-2016, the proportion of children in private school increased with 3.8 percentage points and in 2016, 16.7% of all children were enrolled in a private school (Folkeskolen.dk, 2017).

Primary and lower secondary education can be achieved by going to public school, private school or home school, however, the *Public-School Law* applies in all cases. From 8-10th grade, children have the option to go to continuation school (private residential schools). In addition to normal school subjects there is further emphasis on social learning and different themes such as sport, theatre, music, nature or similar.

c) Upper secondary education

Upper secondary education (ISCED level 3) can be divided into (a) *general upper secondary education*, which primarily prepare students for higher education within different fields[20] and (b) *vocational upper secondary education and training programmes*, which prepare trainees for a career in a specific trade or industry. Both are mainly financed through taxes; however, some general upper secondary education schools are self-governing, which means that some of the costs are covered by tuition. Furthermore, it is possible to combine general secondary education with a vocational upper secondary education.

Admission requirements for general secondary education is a primary school leaving certificate and certain subject requirements. In 2016, 74% of the Danish students applying for a youth education (ISCED 3) had general upper secondary education as their number one priority, while 18% of students had a VET education as their first priority with 27% of these applying for a combination of general and vocational upper secondary education.

[17] There is only a small number of preparatory educations at ISCED level 4.
[18] If there a special reason why the child is unable to start education in the year it turns six, it is possible to apply for a one-year postponement.
[19] However, no later than July 31th in the year when the child turns 17 years old.
[20] The 3-years upper secondary school leaving examination; the 3- higher commercial education; the 3-year higher technical examination; and the 2-year higher preparatory examination.

Vocational education and training (VET) takes place in technical schools or business colleges through a combination of teaching and apprenticeships. It takes 2-5 years depending on whether the student comes directly from primary school, the age of the student, and her or his choice of specialty. Although VET aims at qualifying the student to enter the labour force directly, there are some cases in which students can go on to higher education. VET students receive a salary from their apprenticeships.

d) Higher education

In Denmark, higher education institutions are financed through taxes and regulated by the national legislation with regard to degree structures, teacher qualifications, and examinations. Higher education takes place at universities, university colleges, business academies, and at Maritime Education and Training Institutions (Ministry of Higher Education and Science, 2016). There are no tuition fees as costs are covered by taxes with citizens from EU and EEA countries having equal rights.

Access to higher education in Denmark generally requires a non-vocational upper secondary education, however, some institutions also accept applicants with other qualifications such as a vocational degree or other relevant experience. Moreover, some degrees have specific requirements related to specific courses (level and grades) and language competencies. Further, for some degrees the applicant must pass an exam or submit a portfolio of artistic work. There are eight universities in Denmark, 11 'Artistic Higher Education Institution'', eight university colleges, nine business academies and four maritime educational institutions.

Applicants can apply via quota 1 or 2, which come into play in case the number of applicants fulfilling the formal requirements surpass the supply of available study places. Quota 1 only takes into consideration the upper secondary grade average, while applicants applying via quota 2 are evaluated based on selection criteria set up by the individual institution. Quota 2 applicants must, however, still fulfil the basic requirements. The number of quota 2 study places can be in the range from 10-100% and the allocation of quota 1 and 2 study places is decided by the individual educational institution.

e) Quality assurance

In Denmark, quality assurance is primarily based on self-evaluation, however, "The standard quality of educational provision in the Danish education system are assured by different elements:

- Common rules and guidelines (curricula) specifying the aims, content and duration of programmes and individual subjects.
- Testing and examination system, with the use of external examiners.
- Ministerial approval of provision and inspection in varying degree within the different education areas.
- Quality rules, which have been introduced in a number of educational fields.

The Accreditation Institute (accredited by ENQA) investigate and evaluate the education institutions self-evaluation. They give their recommendations to the Accreditation Council, who are responsible for the final accrediting, which is a decision which are also based on a background of political-, societal- and educational factors.

Private educational institutions at primary and secondary lower level may operate without any state approval. However, if they wish for their pupils to be eligible for state study grants they must accept an accreditation procedure." (European Commission, 2019).

To ensure a high level of quality in *primary schools* (and in daycares), the Council of Children's Learning evaluates schools and daycare institutions' abilities to break down negative social heritage, integrate children with a different ethnic background and to include children with special needs. The minister of

education as well as the minister of children and social affairs can use the council to present questions and seek advice.

The council produces a written report once a year with proposals for initiatives to increase the quality of public schools and daycares. The minister of education monitors the quality development in schools. In cases where a school continuously underperform, the minister has the authority to order the district council to produce an action plan on how to increase the quality.

General upper secondary education institutions must have a procedure for yearly self-evaluation and continuous quality development involving students and teachers regarding student competencies, welfare and transition to higher education. The individual institution decides on its evaluation strategy and special focus areas as a part of the school's quality system. The school produces a written follow-up plan based on the evaluation with information concerning needs for change, possible solutions and operational quality targets. The self-evaluations must be published and accessible at the institutions' webpage. As a part of the self-evaluation, the institutions must complete a survey on the welfare of the students. The survey is produced by the National Agency for Education and Quality.

The technical committee for the individual *vocational upper secondary education* must follow up on whether the educational institution lives up to the expected quality standards. This is done in cooperation with the local lead committee as well as the corporations in which the VET students get their practical training. Further, all schools must have a system for internal quality development and evaluation of results, including procedures for self-evaluation as well as for how information is collected. Like *general upper secondary education institutions*, VET schools must complete a survey on the welfare of the students and are further obliged to measure the satisfaction among the companies providing apprenticeships. The results of the evaluation must be made available and accessible at the institutions' webpage.

f) Accreditation of higher education

New higher educations in Denmark must obtain accreditation before they can be established. The Danish accreditation system is based on the European standards and guidelines for quality assurance (ESG) and switched to an institutional accreditation system enabling higher education institutions *"… to establish a system that best strengthens and develops the quality and relevance of all their programmes. It involves an assessment for their institution's overall quality assurance system by the Danish Accreditation Institution."* (The Danish Accreditation Institution, n.d.-b).

The institutional accreditation requires that educational institutions have a system and framework for quality assurance rooted in five criteria:

1. The institution has the strategies, policies and procedures to handle quality assurance.
2. The institution has a quality culture, organisation and distribution of responsibility, which link quality assurance to all layers in the organisation.
3. The institution secures that all educations build upon state-of-the-art research and/or development activities.
4. The institution secures that the different educations are at a proper level with relevant content and pedagogical quality supporting learning and educational goals.
5. The institution secures that the educations reflect societal needs.

The central bodies in the Danish accreditation system are the Danish Accreditation Institution and the Accreditation Council. The Danish Accreditation Institution is an independent authority, handling assignments regarding accreditation of higher education. It produces reports and provide secretarial

support for the Accreditation Council in its settlement of accreditations of institutions and specific educations[21]. The organisation is divided into four units: (1) Management secretariat, (2) Professional, Vocational and Maritime institutions (PEM), (3) Universities and Educational Institutions of Arts and Culture (UNIK) and (4) Analysis and Council Management.

The roles of PEM and UNIK are to "handle accreditation of new and existing programmes within their respective areas, to take part in the Danish and international cooperation and development projects and to communicate their activities and results". Analysis and Council Management "provides the Accreditation Council with service, produces analyses on transversal topics on higher education and educational quality, prepares Council meetings, is responsible for the Council's communication with operators and maintains contact with the Council's stakeholders", while the management secretariat assists the other secretariats, manage finances and handles internal and external communication (The Danish Accreditation Institution, n.d.-a).

"The Accreditation Council makes decisions regarding accreditation of higher education institutions and their specific educations. Their decisions constitute an overall assessment based on accreditation reports from the Danish Accreditation Institution, and documentation report and other documents submitted to the Accreditation Council by the higher education institutions during the accreditation process" (The Accreditation Council, n.d.).

g) The National Qualifications Framework (NQF)

The NQF was adopted in 2009 and the levelling of qualification is a part of the national education database, and *"provides a systematic overview of public qualifications that can be acquired within the Danish system"*.

The Danish Qualifications Framework distinguish between levels 1-5 and levels 6-8, with the latter being the higher education system – bachelor, master and doctoral-level – which contains explicit references to research related outcomes. Levels 1-5 are based on 'best fit' with an overall judgement of the knowledge, skills and competencies[22] of a qualification. For levels 6-8, qualifications are fully accredited, and hence meet the legal requirements set by national authorities. The structure is based on several different sources such as descriptions of learning outcome in curricula and programmes, the European Qualification Framework (EQF) descriptors, and the Bologna descriptors, and is designed to be relevant to different types of education (theoretical and practical). According to the report the EQF now plays an important role in the educational system: *"The learning outcome approach is widely accepted in all segments of education and training and is increasingly being used to define and describe curricula and programmes. VET has a strong tradition of defining qualifications in terms of competence, but higher education and the different parts of general education are also making progress. It is being admitted, however, that it will be necessary to deepen the understanding of learning outcomes approach at all levels, for example by developing guidelines."*

The NQF and information about it is accessible to the public. An evaluation report revealed that stakeholders (not the general public) involved with the NQF are positive about the role it plays, and 78% of respondents know the principles underpinning the framework well. 64% are positive about the initiative, 27% are neutral. Denmark has not started a discussion on how to open up the framework towards the non-formal sector, however, in 2013 a mapping showed that a high number of certificates and qualifications work outside and parallel to the existing NQF.

[21] The Accreditation Council is allowed to choose other providers of accreditation reports given that the institution is accepted in the European Quality Assurance Register for Higher Education.
[22] Knowledge: Understanding; Skills: Problem solving and communication; Competences: Cooperation, responsibility and learning.

The European Qualification Framework (EQF) is treated as an integral part of the NQF implementation (Danish Evaluation Institute, 2011), and the results show: *"a strong convergence between the Danish Framework and the EQF with a linking of Danish level 1 to EQF level 2."* (Cedefop, 2017).

ESSA-SPORT

Improving the Supply of Skills to the Sector

6

NATIONAL SPORT EDUCATION AND TRAINING SYSTEM

6. NATIONAL SPORT EDUCATION AND TRAINING SYSTEM

Presentation of the education and training systems as well as the supply/training provision for sport and physical activity.

a) National sport education and training system

1) Primary school

P.E. in primary schools plays a substantial role in organised sport. Today, public schools are obligated by law to ensure that children get a minimum of 45 minutes of physical activity per day, and since the mid 1970's focus has expanded to other societal elements to which sport and physical activity contribute, such as health and social aspects (Ministry of Culture, 2009). Although sport serves under the Ministry of Culture, it also influences policy areas serving under other ministries related to areas within health and societal aspects.

- The subject P.E. is compulsory from 1st to 9th grade
- The common goals include three areas of competencies: Versatile exercise of sports; sports culture; relations and body, exercise and well-being.

2) Universities

University of Copenhagen offers sport science at a bachelor and master level.

- Bachelor: Mandatory courses in biology, humanities and the social sciences
- Master: Specialisation within (1) humanities and social science or (2) human physiology.

Aarhus University offers sport science at a bachelor and master level.

- Bachelor: Mandatory courses within anatomy, physiology, biomechanics, sports history, sports sociology, health and sports pedagogy as well as practical subjects within ballgames, gymnastics, athletics, outdoor and swimming
- Master: Specialisation within (1) humanities and social science, (2) sports biology or a combination with purpose of becoming general upper secondary education teacher

The University of Southern Denmark offers sports and health (science) at a bachelor and master level.

- Bachelor: After the first semester students can choose between three academic lines: (1) Movement and learning; (2) physical activity, exercise and health; or (3) innovation and entrepreneurship.
- Master: Specialisation within (1) sports and health or (2) competitive and elite sports
    - Sports and health: Educate students to perform specialised interdisciplinary tasks in dissemination, analysis, development, planning and research in relation to sports, movement and health.
    - Competitive and elite sports: "is closely linked to research in the field of performance optimisation, talent development and management, as well as within the sporting life as part of civil society."

Furthermore, the University of Southern Denmark offers degrees in sport and event management (economics and business administration):

- Bachelor: Subjects within management, financial management, economics, organisation, financing and marketing, skills within law, statistics and IT.

- Master: Specialisation in subject related economics, organisation and marketing with focus on sport and events.

Aalborg University offers sport science at a bachelor and master level:

- Bachelor: Courses within e.g. educations of specific target groups, performance optimisation, anatomy, physiology, biomechanics, psychology, "sport, culture and society", health statistics, ergonomics, information technology
- Master: Specialisation within: (1) General sport science, (2) sports technology, (3) public health or (4) learning and change management.

Moreover, three university colleges offer sport management at ISCED level 6 (professional bachelor level) with focus on the sport, event and leisure industry and subjects within sports marketing, management, economics and sports law. These are University College of Northern Denmark, Aarhus Business College (EAAA), CPH Business (CPH Lyngby) and Lillebælt Academy.

b) Sport federations

The many sport federations have their own approach to and rules for education and upgrading in the areas of coaching, officiating, management, administration and volunteering. Knowledge, skills and competences in these areas are not provided in the national education system, which is why the federations have their own systems. The sports education system reflects the size of the federation, so larger federations have more comprehensive rules, grades, steps and courses compared to smaller federations.

Traditionally, there has been a line between the sport pupils and students do in P.E., and the organised sport they do in their leisure time. Sport education has therefore been anchored in the leisure time. In the aftermath of a series of Danish school reforms, this line is not sharply raised anymore, which is why some of the biggest federations offer teaching programmes in P.E. to primary-, secondary and upper-secondary schools. These teaching programmes give the students a youth or a basic coach certificate, which can be used in most sports.

1) Coaching

In most of the federations, a trainer or a coach certificate is mandatory for training certain age groups or levels of athletes. These certificates can be acquired through completion of training programmes. The federations are responsible for these programmes and keep them compliant with European or International standards.

As a coach you manage both the physical, technical, mental, social and tactical aspect of a team or an athlete. Many federations hold supplementary courses with a narrow and specialised content. The aim is to support and upgrade coaches with the skills and knowledge they find necessary, interesting or difficult. Examples of these specialised courses could be "sports injuries and what to do as a trainer", "sports psychology" or "age-related strength-training".

2) Officiating

The officiating is managed by the federations, just like the coaching. There are different levels, and sometimes different age groups, you can officiate with certain certificates/licenses. These certificates/licenses are, in the higher levels, compliant with international standards, since European and international matches and tournaments are a possibility. Officials can sign up for officiating-courses in the federations, but in some of the bigger federations, this is only possible to a certain level. After this, the official is nominated to further courses based on his or her talent.

3) Management and administration

The national sports federations offer different kinds of aid for the clubs in the area of club management and administration. Many federations hold supplementary courses, like they do for the coaches, where the content is targeted towards the leaders, volunteers or board members in the clubs. Examples are different aspects of club economy, conflict management, leader recruitment or digital member systems. Besides the courses, the federations also offer consultancy to the clubs within a wide range of tasks.

Because of the Danish labour market model, the clubs are not automatically covered by a collective agreement since there is no trade organisation. The clubs are, however, subject to the European Employment Law, which means they must follow specific rules. These rules define rights and duties between employer and employee (e.g. the clubs and the coaches), and the federations assist the clubs in for example formulating work contracts and maintaining good working conditions for the employer and employee.

4) Volunteering

The national sports federations offer courses and consultancy for the clubs in attracting and retaining volunteers. Branding and visibility are important factors in getting attention from possible volunteers or members. Besides this, DIF recommends all its member federations and clubs to appoint a "Volunteer-Responsible" on their boards. This person's focus is to improve and optimise the conditions for the volunteers.

c) Other vocational and professional qualifications

There exist some, but relatively few, other educations within the formalised education system:

- Vocational upper secondary education and training programmes
- Greenkeeper
- Groundsman
- Greenkeeper-Groundman assistant
- Fitness instructor
- Event assistant and event coordinator
- Swimming pool assistant
- Nature and cultural communication

Other:

- Instruction and administrative function in training and sports (six weeks)

Furthermore, some general upper secondary educations (level 3) have incorporated sport management as a minor part of the curriculum

d) NQF in sport

The NQF in Denmark only applies to formal education (see the explanation of the NQF), and hence do not differ between industries.

e) Private training providers in sport and physical activity education

The commercial sports sector has grown with rapid pace since the 1980's and so has the private market for education. Yet, only few of these educations are approved by the public education system. In 2008, the Danish Institute for Sports Studies registered nine providers of fitness educations (Storm & Brandt, 2008). In 2011, the institute registered 25 fitness related educations and 59 private providers of sport education altogether, and in 2014, the institute found 46 private yoga educations (Bjerrum & Pilgaard, 2014).

f) System for the recognition of informal and non-formal education in sport

There is no comprehensive system with focus on informal and non-formal learning. However, it is possible to get an evaluation of "real competencies" in the education system. The evaluation of real competencies is about recognising that there are numerous ways to increase competencies, which are not necessarily related to formal schooling. For instance, through job experience, volunteering or leading an organisation. Furthermore, courses and unfinished education are also relevant when evaluating real competences. The basic idea is that adults can build upon their real competencies with a formal education and that it is not necessary to learn the same things twice. Hence, evaluation of real competencies makes it possible to earn credit for certain subjects and save time (Ministry of Education, 2016).

1) The provision of training for volunteers in sport

The training and education of volunteers is maintained by the different federations. There is a tendency that different kinds of education are divided between the umbrella organisations DIF and DGI on one side and the sports federations on the other. DIF and DGI arrange and hold courses focusing on the administrative and management aspects, how to attract and maintain more volunteers, and general courses like mental-coaching and leadership. Moreover, they hold courses in different kinds of outdoor sports and individual sports. The sports federations are focusing on education of trainers, officials and coaches with a more direct connection to the sport.

2) Qualifications required by law to work in sport or required under the rules of federations

There are no qualifications required by law to work in sport. However, it is compulsory for sports associations to obtain a children's certificate before hiring or employing a person, who is to have direct contact with children under the age of 15. The law also applies to the employment of individuals who are in a position to get in direct contact with children under the age of 15 (Ministry of Culture, 2018).

The annual financial statements from sports organisations receiving annual grants from the Ministry of Culture need according to the law to be revised by an external state authorised auditor (Ministry of Culture, 2010)

Under the rules of federations there are some requirements for individuals holding specific elected positions within the federations (e.g. statutes of Danish FA, Danish Tennis Federation, Danish Swimming Federation & DIF). Within the umbrella organisation DIF, eight of the ten members of the appeal body need to have a law degree. And in the three-member doping committee, the chair and one other member must have a law background, while the third member must have a background within medicine (NOC and Sports Confederation of Denmark, 2019).

g) Education and training system in sub-sectors

1) Coaching and officiating

Education and training within these areas are provided by the sports federations since each sport has its own rules and regulations. The education systems are normally organised as steps on a ladder, and the higher steps you reach, the better teams you can coach or officiate during matches. The lowest steps take about a day to complete, and the highest steps can take several weeks and include supervision and exams. The umbrella organisations offer materials to the basic steps so the clubs can recruit parents or young athletes as assistant coaches by themselves.

2) Management and administration

The management and administration related to sport are independent educational sectors under the public education system. It is provided by universities, university colleges, or business academies. These educations focus on general business and finance or sports related business and finance. The educations in sport management are often connected with the event and leisure industry.

3) Fitness

The educational system for fitness and training in Denmark is not regulated by any federation or organisation, however, there is only one officially recognised fitness-instructor education. This education can be achieved during a two-year VET with both schooling and internship. Besides this, an instructor certificate can be obtained at different folk high schools with a base in DIF's fitness education or during private fitness educations with different European fitness certificates such as Europe Active/EREPS. In addition to this, you can be certified as a personal trainer or be an instructor in one of the many specialised types of fitness such as Zumba-instructor, TRX-instructor, etc.

4) Outdoor

Due to the specialised nature of outdoor activities, it is mainly private educational institutions and folk high schools in all of Scandinavia who provide education in this field. It is possible to take a fulltime one-year, or part time two-year VET to be an outdoor-guide with focus on communication and narration. Since outdoor sports are becoming more and more popular, the umbrella organisations DIF and DGI have within recent years strengthened their focus on courses within kayaking, mountain biking, climbing, etc.

5) Dual Careers

Dual careers programmes are specialised for top athletes who are enrolled in education. These programmes are negotiated and facilitated by Team Denmark, which is working to ensure the best possible conditions for athletes, so they can succeed at highest possible level. It is possible to apply to these programmes from primary school level and all the way up to universities. Being on a Team Denmark programme gives the athlete more flexibility in the schedules, access to additional education, extended time to complete the education and help from a mentor. The idea is to let the young athlete be in an environment near the athlete's friends, families and school, and give the older athletes the opportunity to take care of both studies and sport. After graduation, Team Denmark promotes the benefits of employing athletes to companies and assists the athletes in finding flexible jobs and career paths.

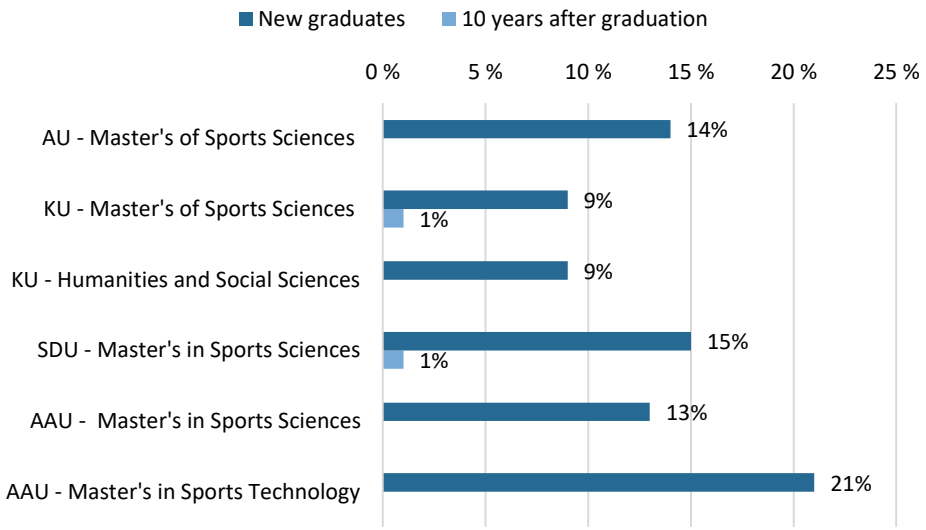
h) Monitoring and matching of graduates

The Ministry of Higher Education and Science[23] has conducted questionnaires in 2016 and 2018 and further collated data from Statistics Denmark to monitor graduates in the labour market including graduates from a sport science education. The data contains inter alia unemployment rate, salary, the sectors the graduates are working in, and the educations' usefulness in their current job (Ministry of Higher Education and Science, 2019).

Figure 6.1 shows the unemployment rate[24] for new graduates and individuals graduating 10 years ago with a master's degree. Unfortunately, data on the unemployment rate for individuals who graduated 10 years ago is only available for the University of Southern Denmark (SDU) and the University of Copenhagen (KU).

The employment rate for new graduates are lowest among KU graduates (9%) and highest Aalborg University graduates with a sport technology degree. However, it is important to underline that the data shows the percentage of individuals who are employed, while there is no information on the type of job. For comparison, he average national unemployment rate for master's level graduates is 11% (Ministry of Higher Education and Science, 2018a).

Figure 6.1: Unemployment rate graduates master level (%)

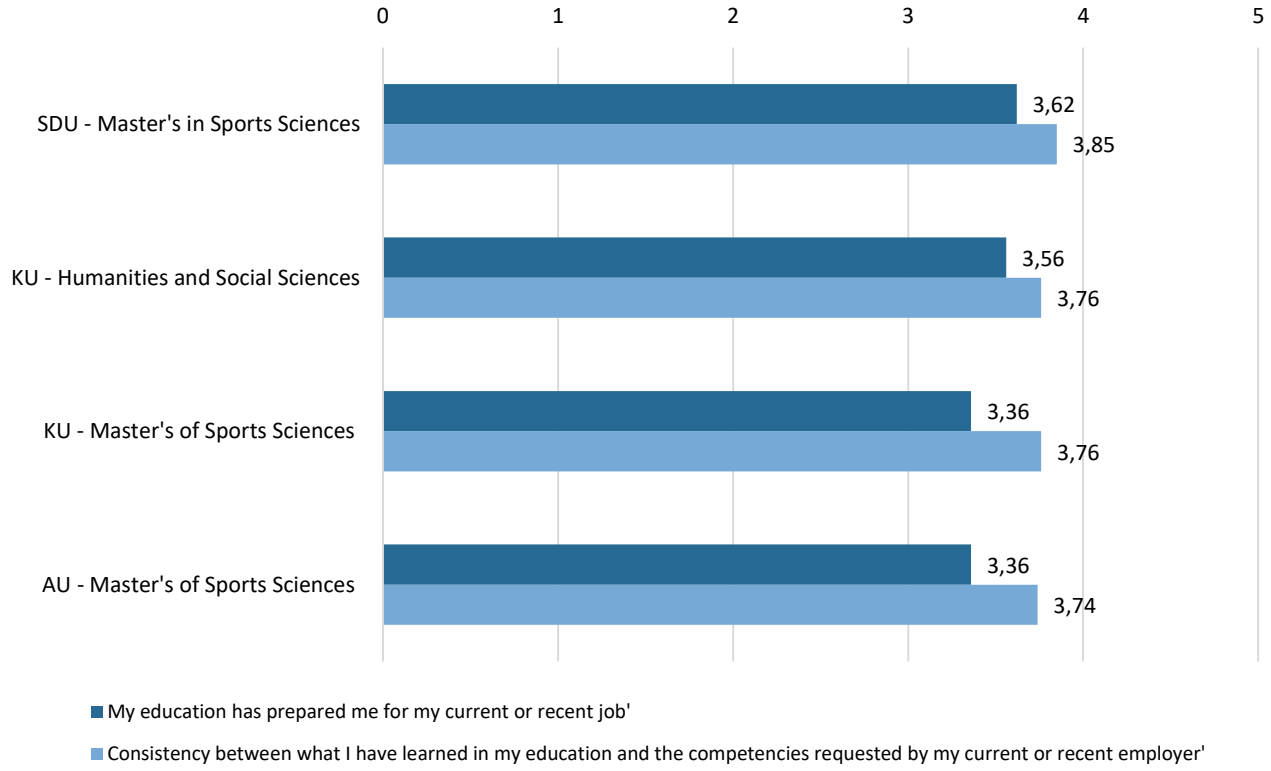


Source: The Ministry of Higher Education and Science (2019)

Graduates were asked to evaluate their opinion on a five-point scale from strongly disagree (1) to strongly agree (5) on the statements 'My education has prepared me for my current or recent job' and 'There is consistency between what I have learned in my education and the competencies requested by my current or recent employer'. There is no data from the master's programmes in Aalborg (AAU), however, the graduates' opinions are quite consistent across universities with averages varying from 3.36 to 3.62 on the first statement, and 3.74-3.85 dependent on the second statement (see figure 6.2).

[23] https://ufm.dk/uddannelse/statistik-og-analyser/uddannelseszoom
[24] Unemployment shows the percentage of graduates from the education who are not in jobs. Unemployment is calculated for both new graduates and for those who have graduated for 10 years. Newly educated unemployment is measured in the second year after graduation.

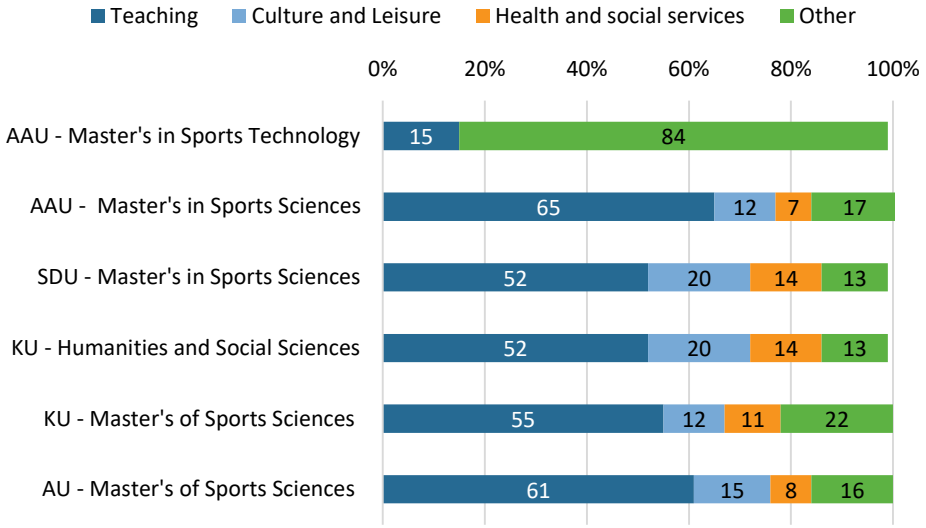
Figure 6.2: My education has prepared me for my current or recent job



Source: The Ministry of Higher Education and Science (2019)

When it comes to the sectors in which the graduates are working, the pattern is quite similar between all programmes, except for the master's programme in sport technology from AAU (see figure 6.3). While most of the graduates are working with teaching, the graduates from sport technology are working in 'Other' within the private sector. Moreover, the culture and leisure sector employ many graduates from the sport science programmes.

Figure 6.3: Sectors on the labour market for master graduates



Source: The Ministry of Higher Education and Science (2019)

In some universities have also conducted surveys on the labour market situation for graduates. Aarhus University (AU) made its last employment survey in 2016. It underlines that the data does not represent a complete picture of the employment situation for all graduates and their tasks, but merely provides an image based on the survey respondents during the years in questions (Aarhus University, 2016).

AU has also made surveys in relation the graduates and the labour market. The survey inter alia asks in what sector the graduates are currently working and to which degree the competences acquired during the education match the competences required in their present job function (Aalborg University, 2015).

Moreover, there is legislation within the field. According to the University Act[25] Chapter 3, § 13a, the universities have the obligation to discuss the adoption of the education programme to the labour market. Thus, there is an aim of matching graduates with the roles in the sport industry. In accordance to the law, the universities appoint one or several panels composed of external members. Together, the members must have experience and insight into the education area and the areas of employment that the university programmes are directed towards. In addition, the law states that the university must ensure dialogue between the panel and university in relation to the education's quality and relevance for the society and involve the panel in the development of new and existing programmes and new teaching and exam forms (Ministry of Higher Education and Science, 2018b).

i) Trends and challenges in sport and physical activity education and training

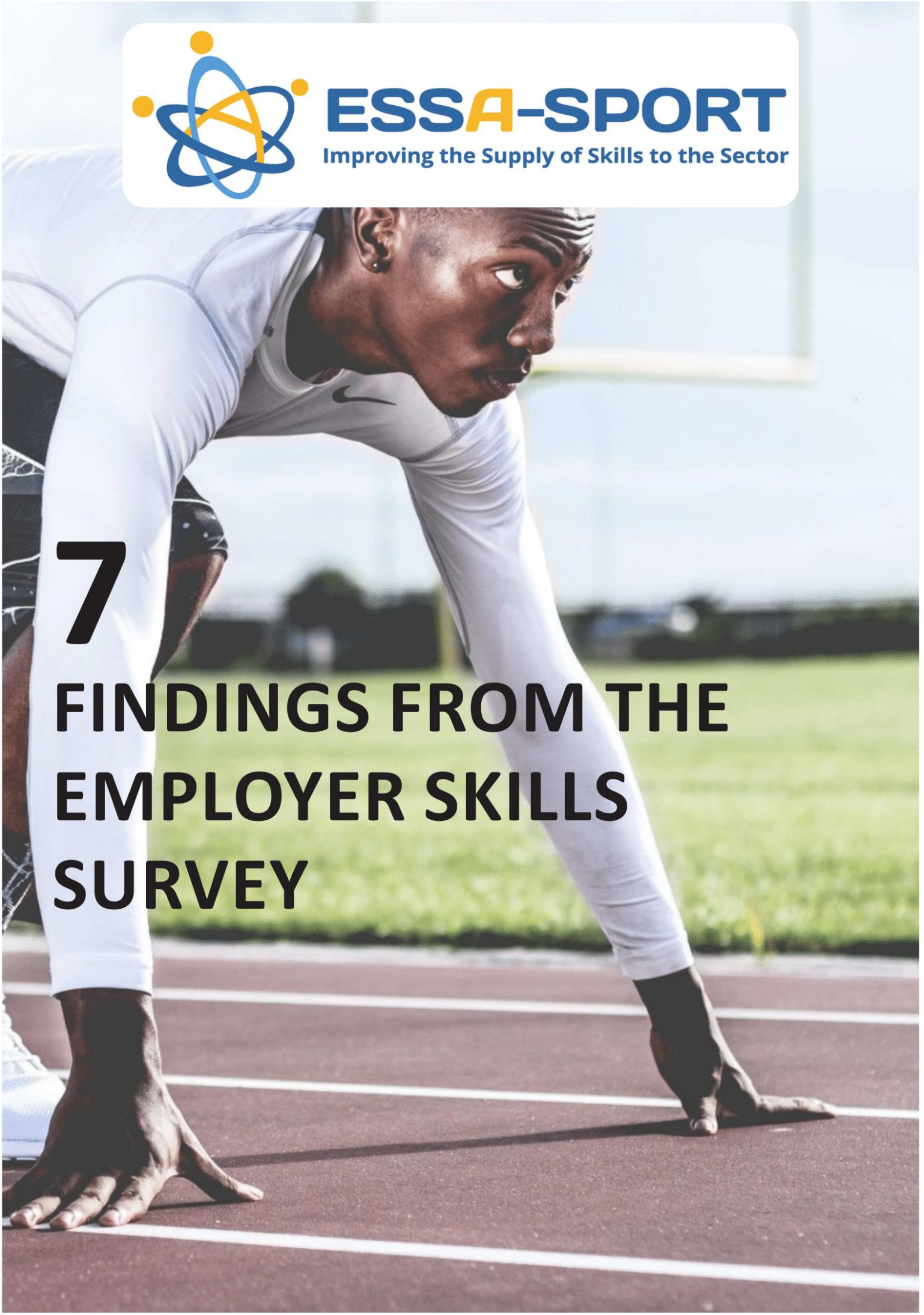
Denmark is a country with strong traditions in volunteerism in sports clubs and sports federations. Approximately one in eight Danes is a volunteer in a local sports club (Rambøll, 2017). Despite the umbrella organisations' focus on attracting and retaining volunteers, this number has been relatively unchanged during the last ten years. Despite this, research shows that there is a relatively large replacement and withdrawal of volunteers in the age groups ranging from children and up to 36-40-year-olds , while the group of volunteers aged +70 are increasing (Fridberg & Henriksen, 2014).

The 36-40-year-olds seem to be connected to the clubs through their children's participation, and they stop volunteering when their children exit the clubs.

[25] Bekendtgørelse af lov om universiteter

Further, there is an increase in the tendency to do individual and/or unorganised sports like hiking, running, fitness and street sports for both children, adults and the elderly. These forms of sport do not require any special club, club-owned facility or match-setup. Hence, it is likely that the traditional demands for federation organised and or education will either decline or change to accommodate the new needs.

ESSA-SPORT
Improving the Supply of Skills to the Sector



7 FINDINGS FROM THE EMPLOYER SKILLS SURVEY

7. FINDINGS FROM THE EMPLOYER SURVEY

Analysis of the national results from the online employers' survey on skills needs in the sport and physical activity sector (e.g. skill needs, gaps and shortages, tendencies, perspectives).

a) Introduction

The total number of responses from Danish employers of the 'European Employers Skills Survey for the Sport and Physical Activity Sector' is 348 which make up 9.1% of the total respondents across the 28 countries (see figure 7.1 and 7.2).

Figure 7.1: Number of responses

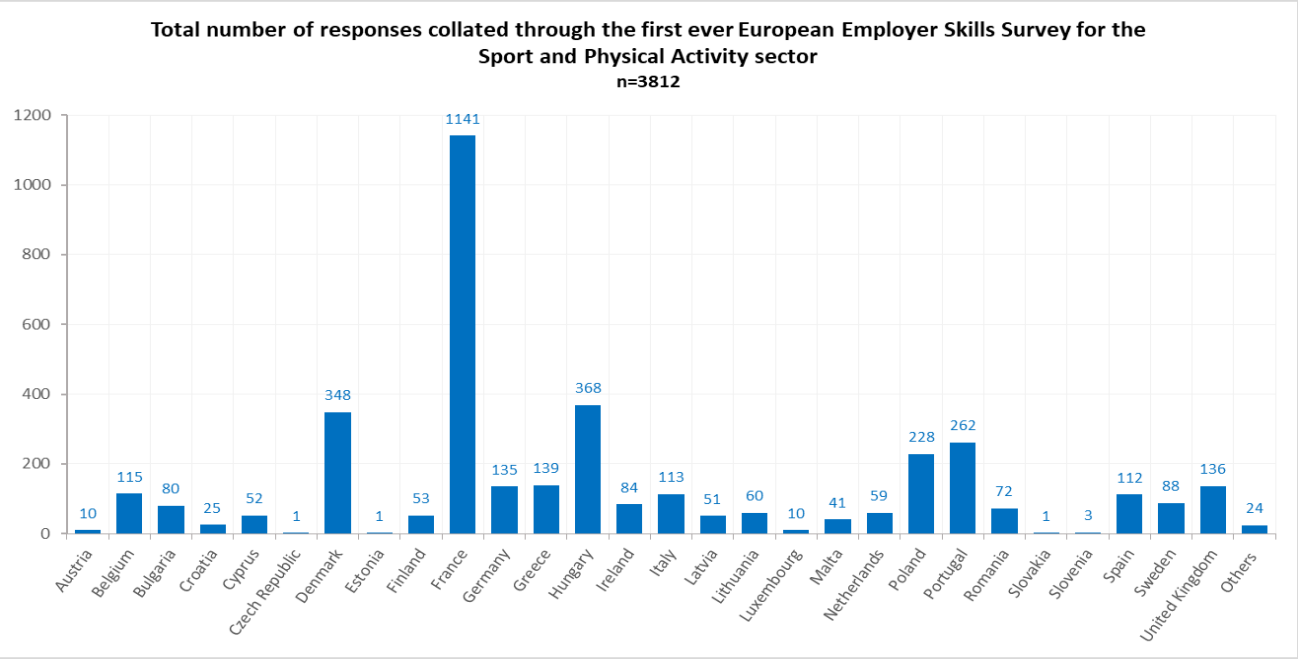
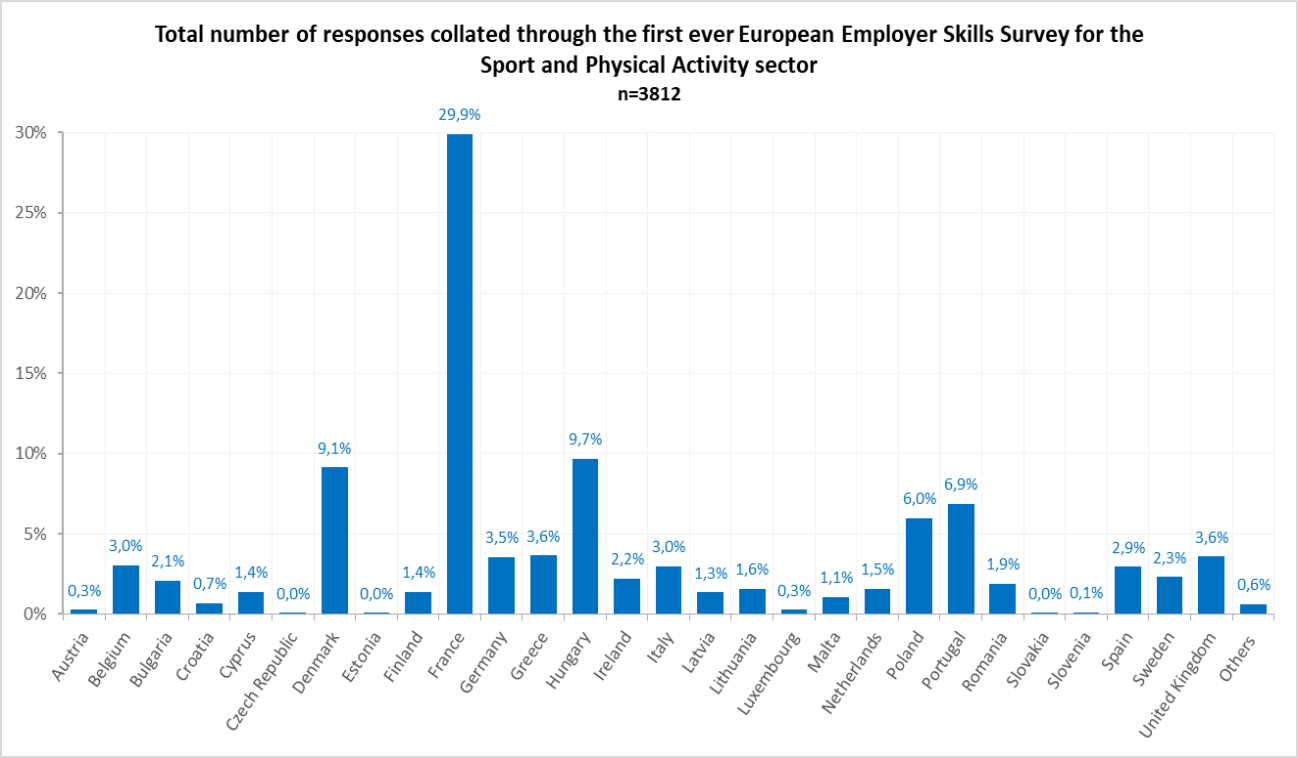


Figure 7.2: Number of responses (%)



Over one-third of the respondents are sports clubs (35%) (see figure 7.4) and almost 50% would best describe their organisation as not for profit, voluntary and charitable (see figure 7.3).

Figure 7.3: Categorisation of organisation

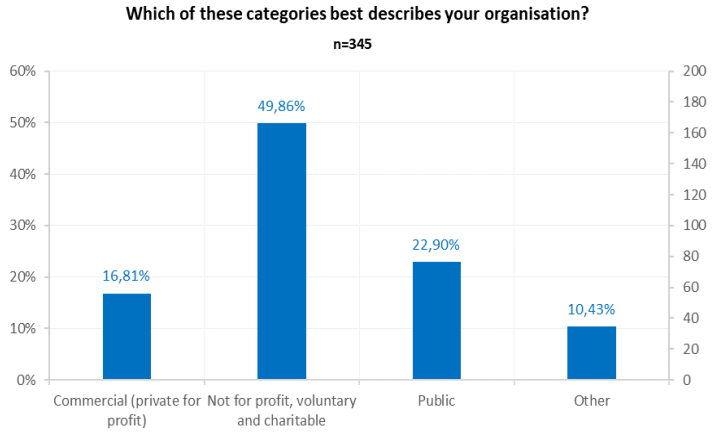
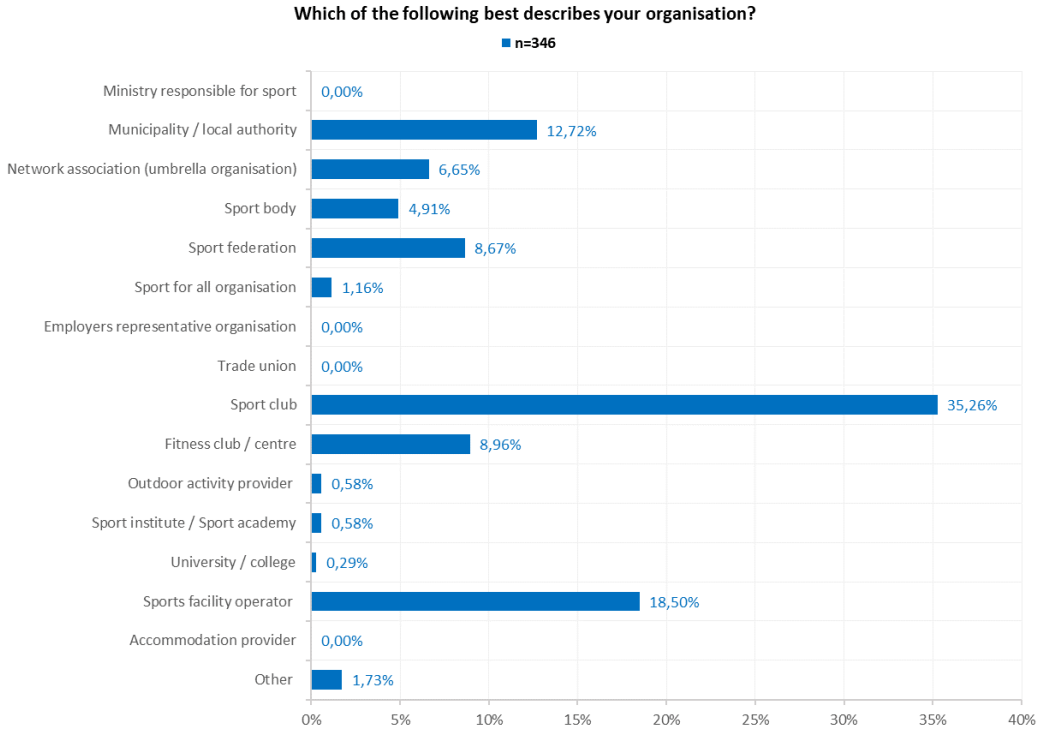


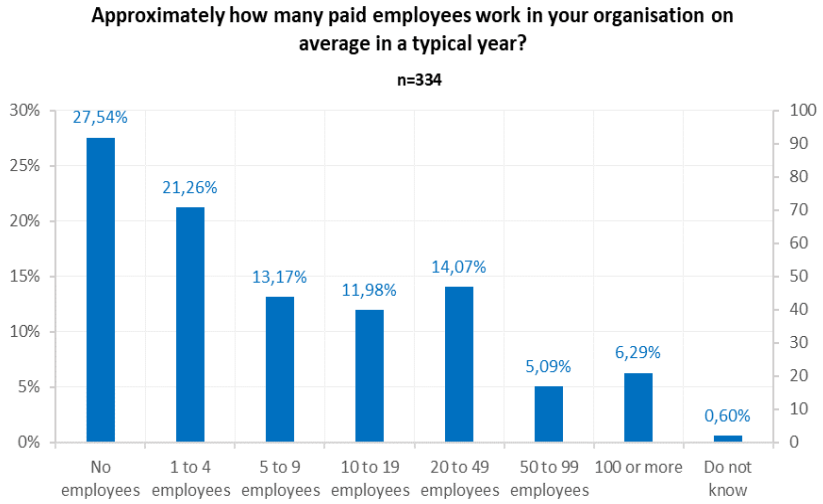
Figure 7.4: Description of organisation



Furthermore, more than 48% of the respondents say that they on average in a typical year have less than five employees (see figure 7.5). According to Statistics Denmark, the definition of a medium-sized business is a company with 50-249 FTEs (Full-time equivalent), while a major business has 250+ FTEs (Statistics Denmark, 2016).

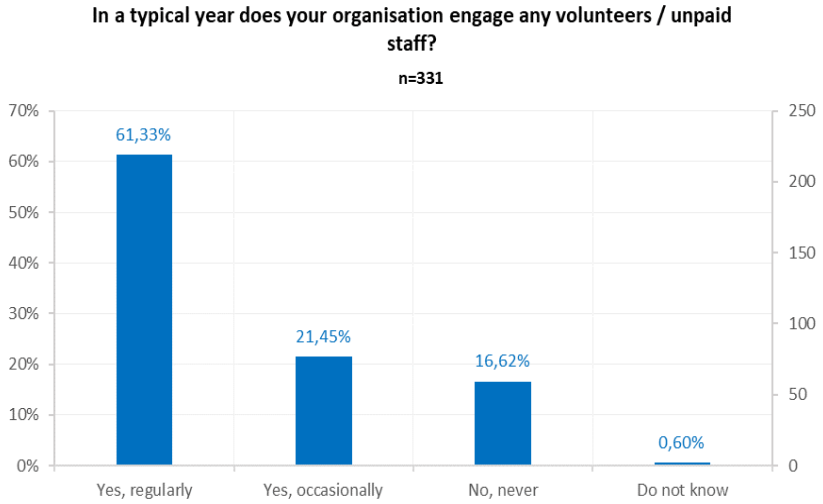
Based on that definition, most of the organisations and companies based in the sector for sport and physical activity are small, with only a few medium-sized or major organisations.

Table 7.5: Size of organisation



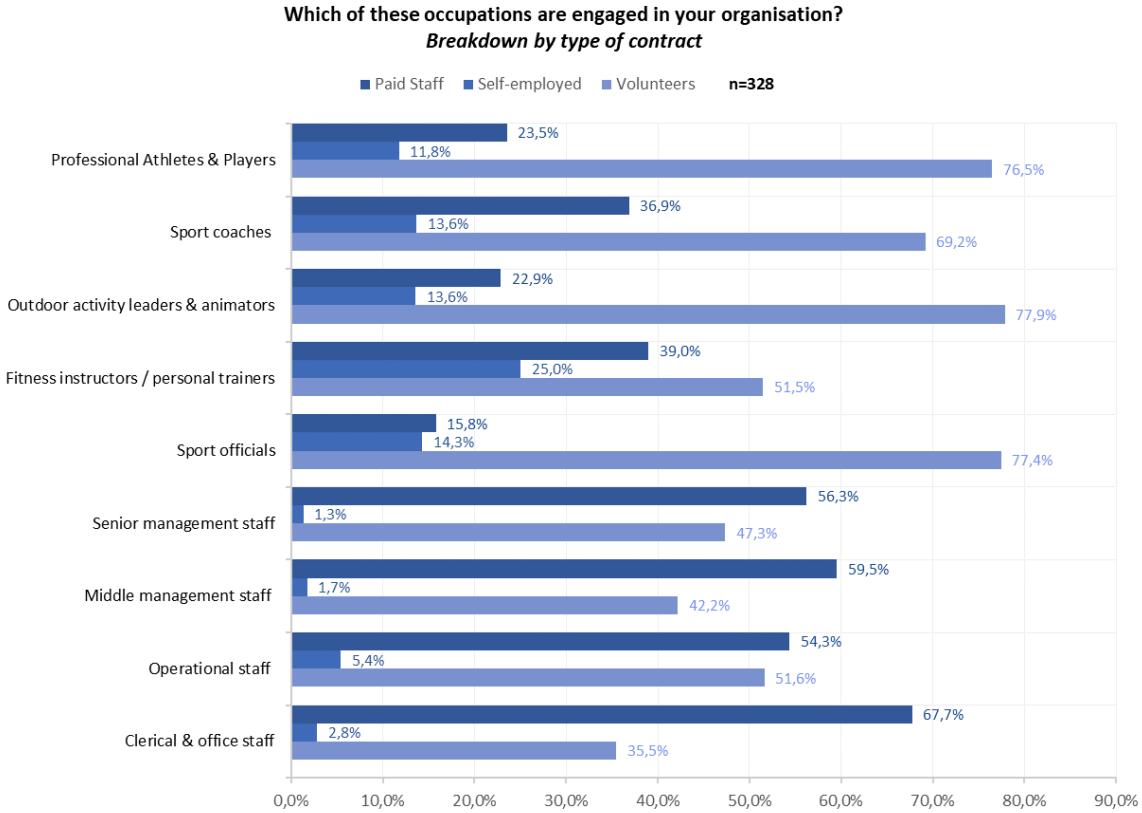
Almost two-thirds (61%) of the respondents answer that they regularly engage volunteers/unpaid staff in their organisation (see figure 7.6).

Figure 7.6 Engagement of volunteers



The pattern is similar when the overall numbers are broken down to specific types of contracts within the surveyed organisations. Volunteers make up a large part of the total employment across occupations, and five out of nine occupations are dominated by volunteers (see figure 7.7)

Figure 7.7 Occupations across organisations



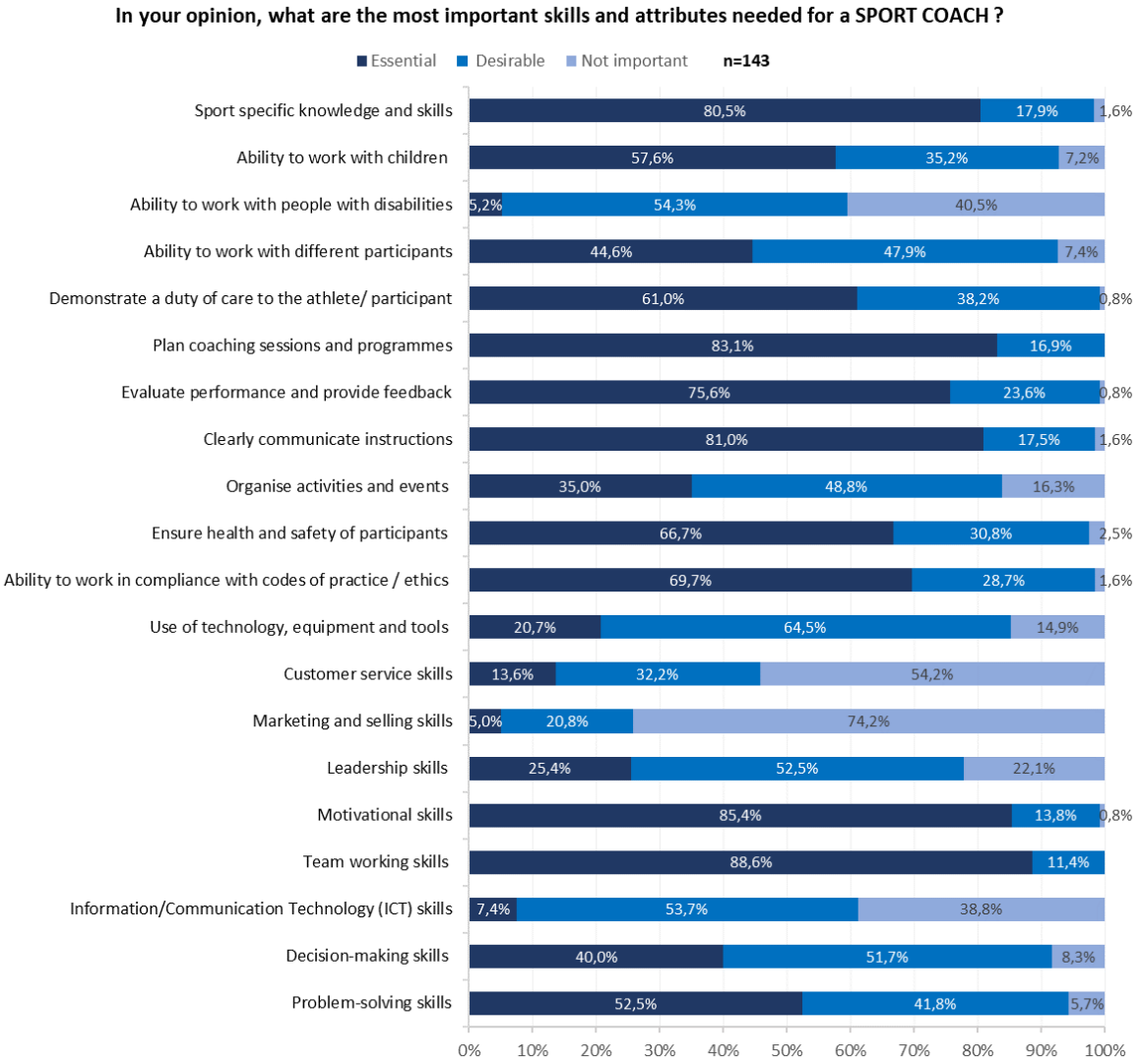
These numbers are not surprising and underline that the Danish sports system is built on voluntary member-based sports clubs and voluntarism.

b) Important skills and attributes, expectations and weakest skills

1) Sports coach

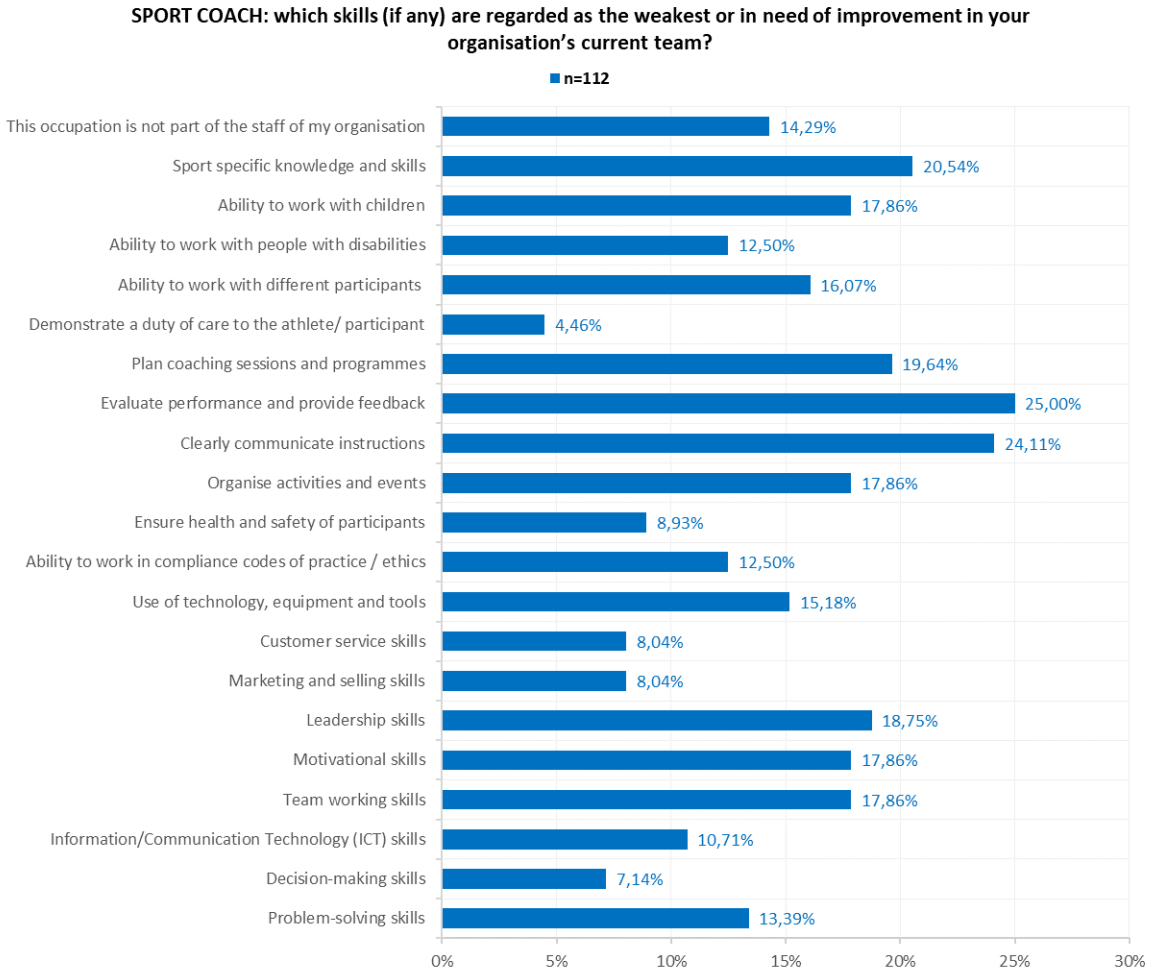
In relation to sports coaches there is a quite clear focus on 'on-the-pitch attributes' when the respondents (n=143) are asked about the most essential skills and attributes (see figure 7.8.). Sport specific knowledge and skills, ability to plan coaching sessions and programmes, ability to clearly communicate instructions, motivational skills, and team working skills are highlighted. On the other hand, customer service skills, marketing and selling skills, and information/communication technology (ICT) skills are attributes that respondents (n=112) estimate as being less important. This emphasises that the employers believe that the role of the sports coach is essentially on the pitch.

Figure 7.8: Important skills for sport coach



It is quite interesting that the respondents regard sport specific knowledge, the ability to plan coaching sessions and programmes, and the ability to clearly communicate instructions as the weakest skills with need for improvement (see figure 7.9). Thus, there is a clear gap between the skills supplied and the skills demanded in the market for sports coaches.

Figure 7.9: Weakest skills or in need for improvement (sport coach)



2) Outdoor activity leader and animator

In relation to outdoor activity leaders and animators, employers (n=78) regard 'sport/activity specific technical knowledge and skills', 'the ability to clearly communicate instructions', and 'team working skills' as essential attributes (see table 7.10), while skills considered weakest/in need for improvement are 'the abilities to work with children', 'plan activity sessions', and 'organise activities and events' (see figure 7.11).

Figure 7.10: Important skills for outdoor activity leader and animator

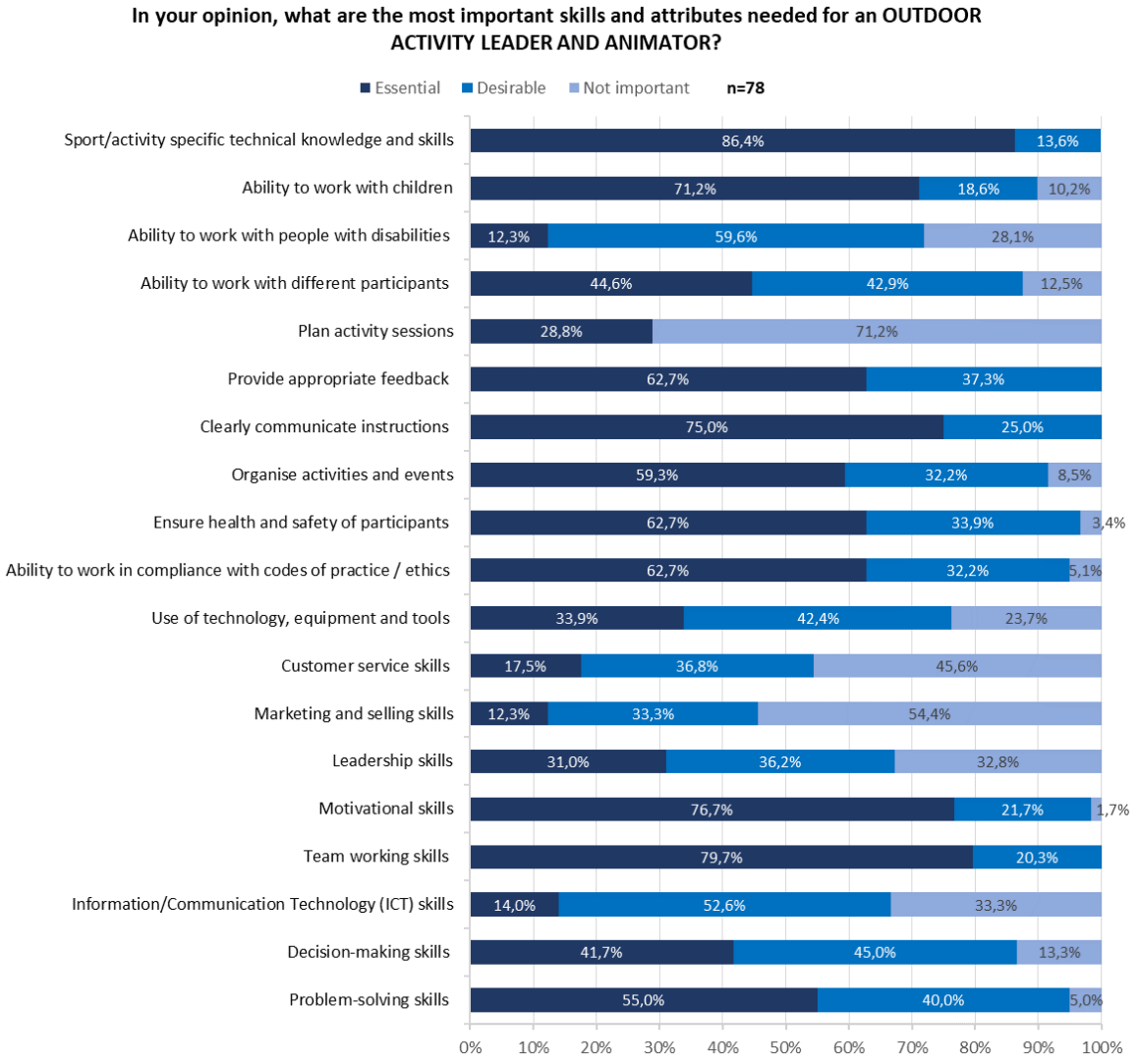
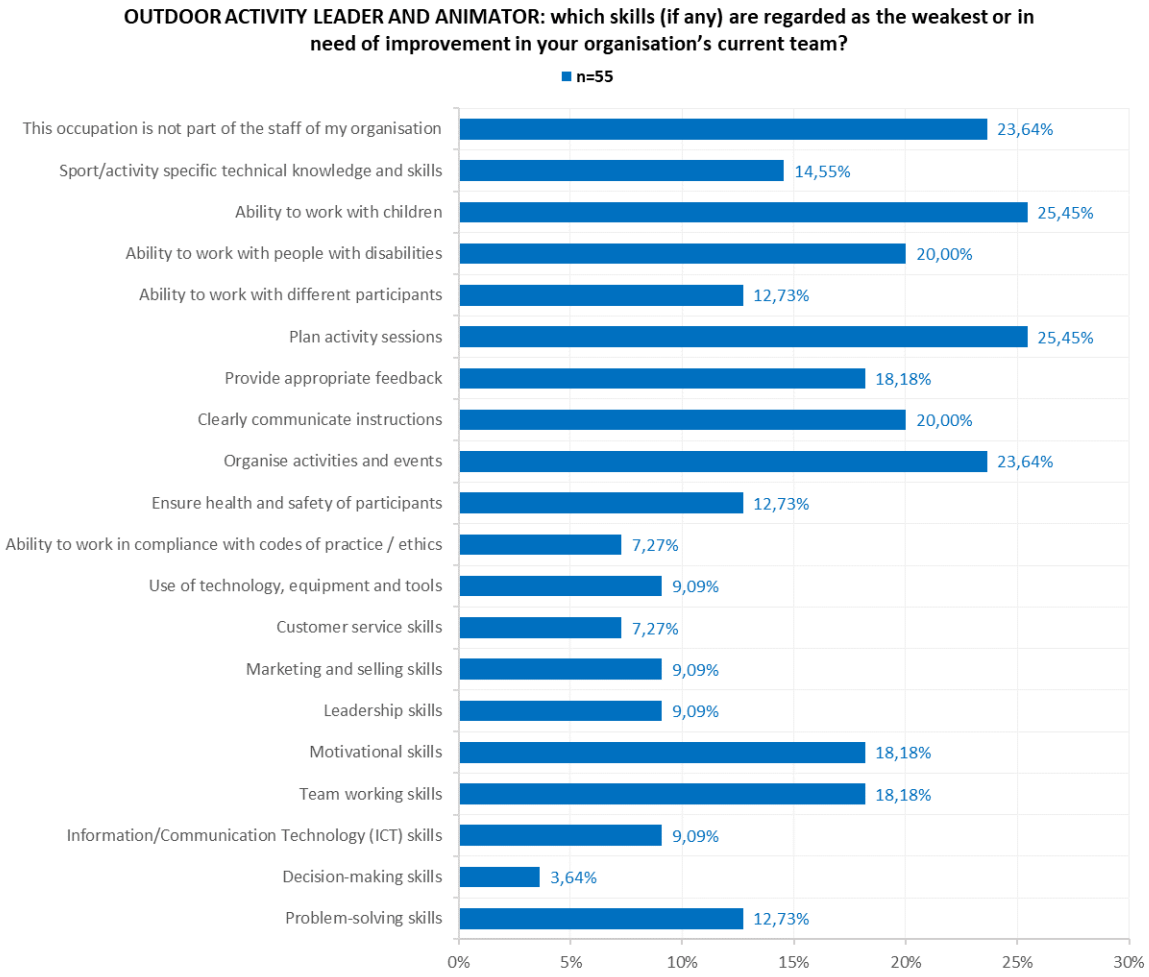


Figure 7.11: Weakest skills or in need for improvement (outdoor activity leader and animator)



3) Fitness instructor/personal trainer

Employers of fitness instructors and personal trainers (n=73) regard 'the ability to communicate effectively with participants' as essential (93%) (see figure 7.12). Other areas that are essential are 'motivational skills' (89%), the 'ability to understand participants' needs' (80%), and the 'ability to ensure the health and safety of participants' (85%). Thus, from the employers' point of view, fitness instructors/personal trainers need to have a strong emphasis on the participant. One interpretation of this could be that within the fitness sector there is a focus on the paying customer, while the voluntary sector to a higher degree is dealing with participants that are paying a member fee. To some sense, this is also recurrent when the respondents (n=52) state where there is room for improvement. Areas such as 'marketing and selling skills', the 'ability to understand participants' needs', and the 'ability to communicate effectively with participants' are highlighted as areas where improvement is desirable (see figure 7.13)

Figure 7.12: Important skills for fitness instructor/personal trainer

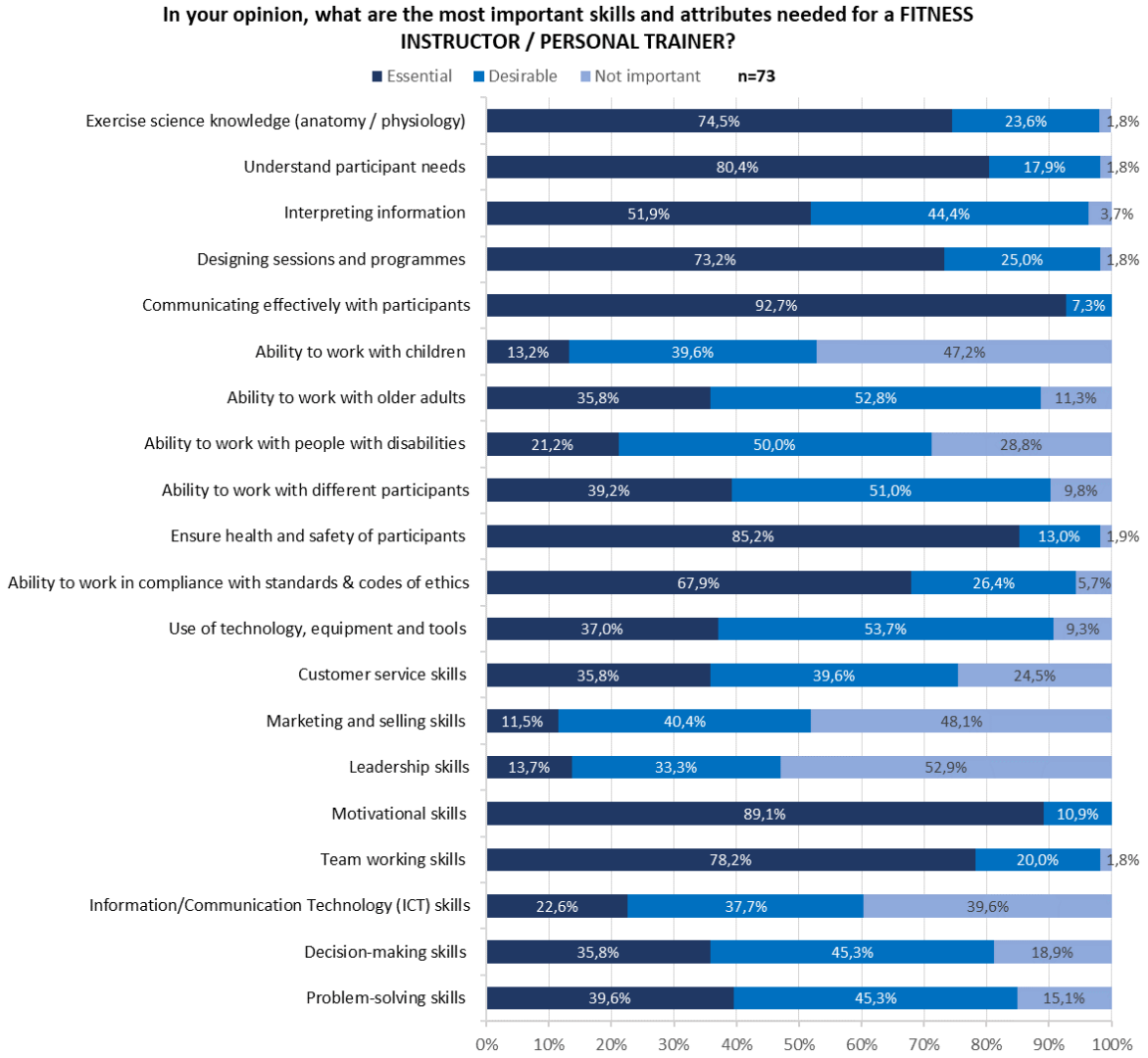
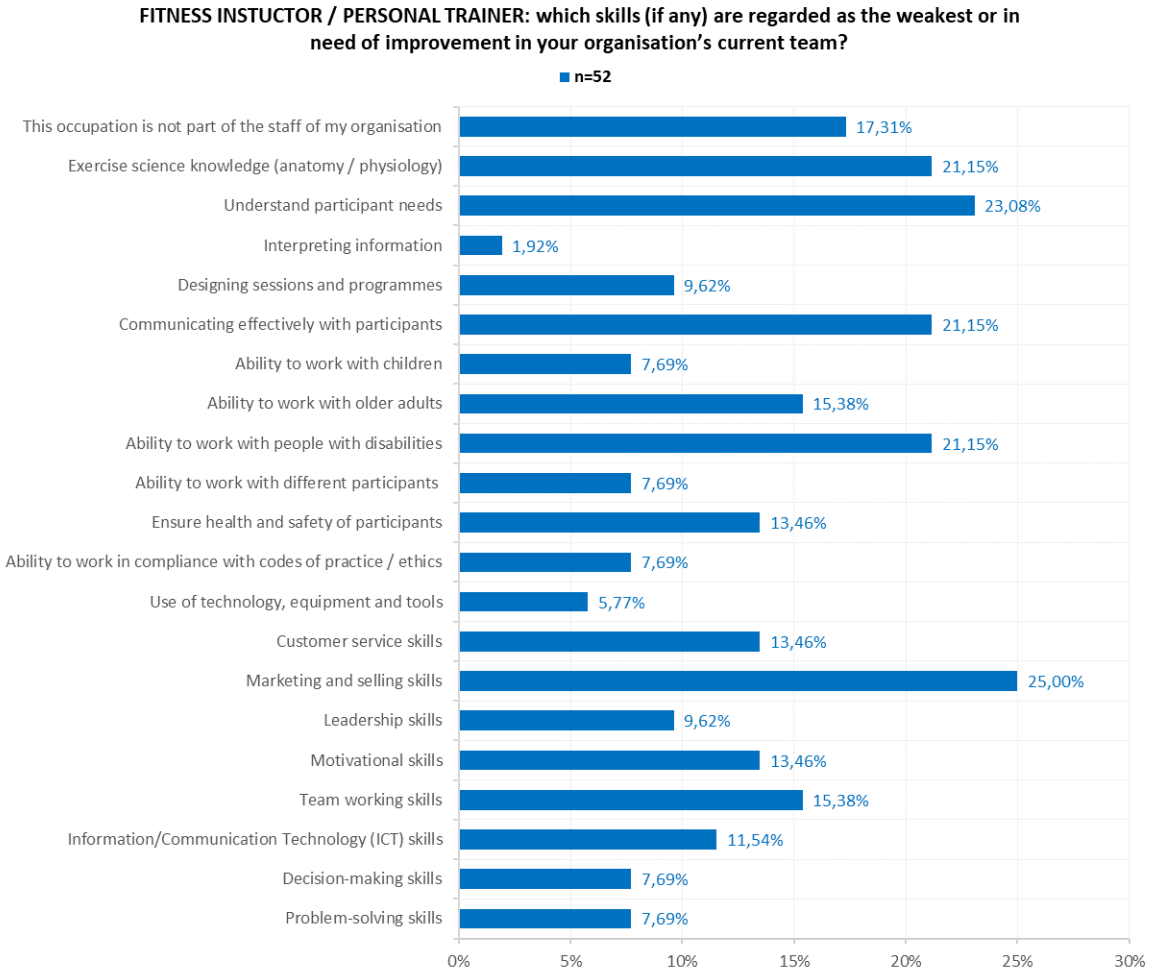


Figure 7.13 Weakest skills or in need for improvement (fitness instructor/personal trainer)



4) Sports official

Regarding the skills and attributes needed for sports officials, employers (n=43) particularly highlight areas within (good) governance such as applying the rules and laws of sport (91%), upholding integrity and fair play (90%), and the ability to work in compliance with codes of practice/ethics (77%) (see figure 7.14). They (n=31) highlight that there is room for improvement when it comes to abilities to communicate information as an official (36%), manage conflicts (26%) and applying the rules and laws of sport (26%) (see figure 7.15).

Figure 7.14: Important skills for sport official

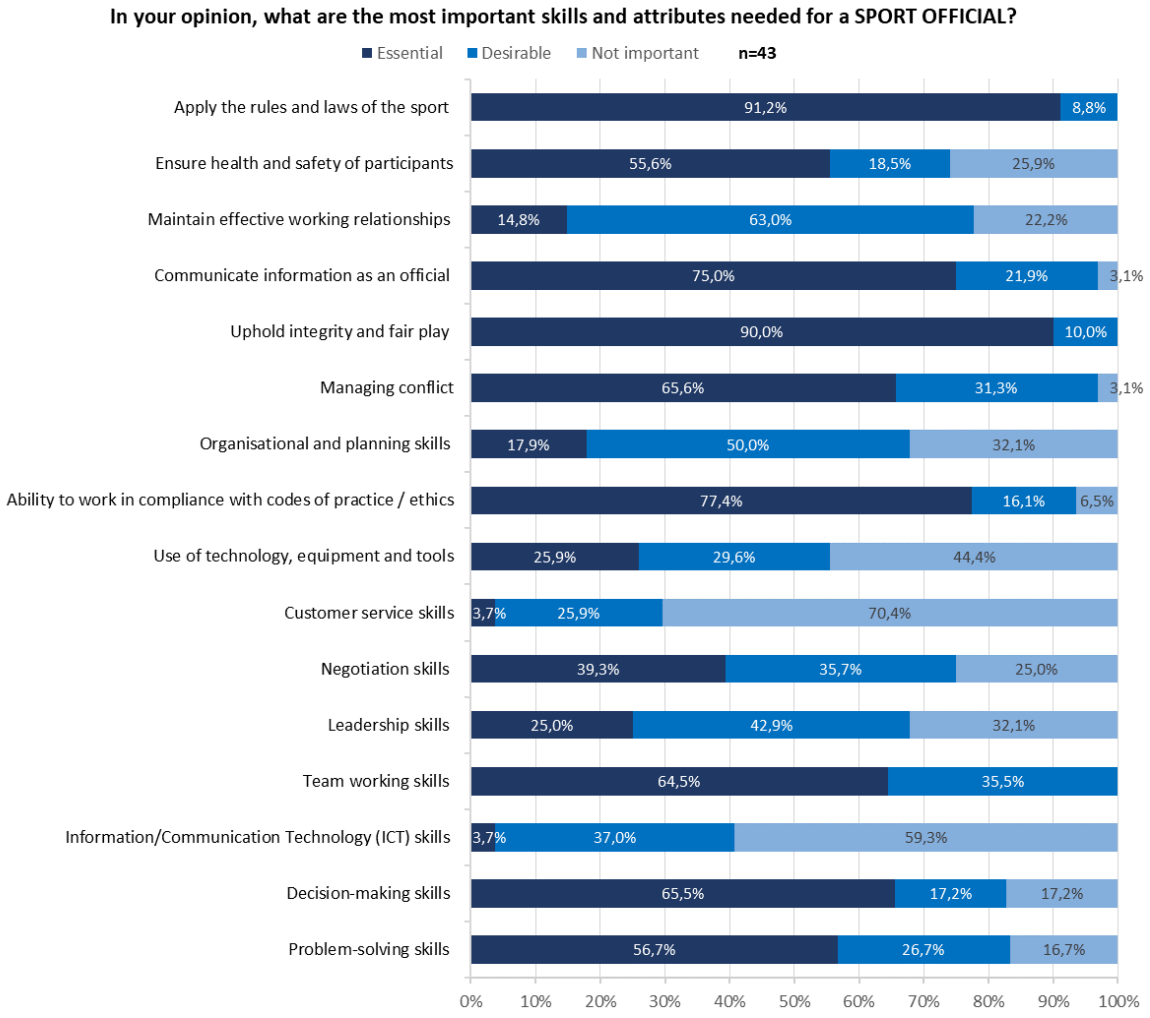
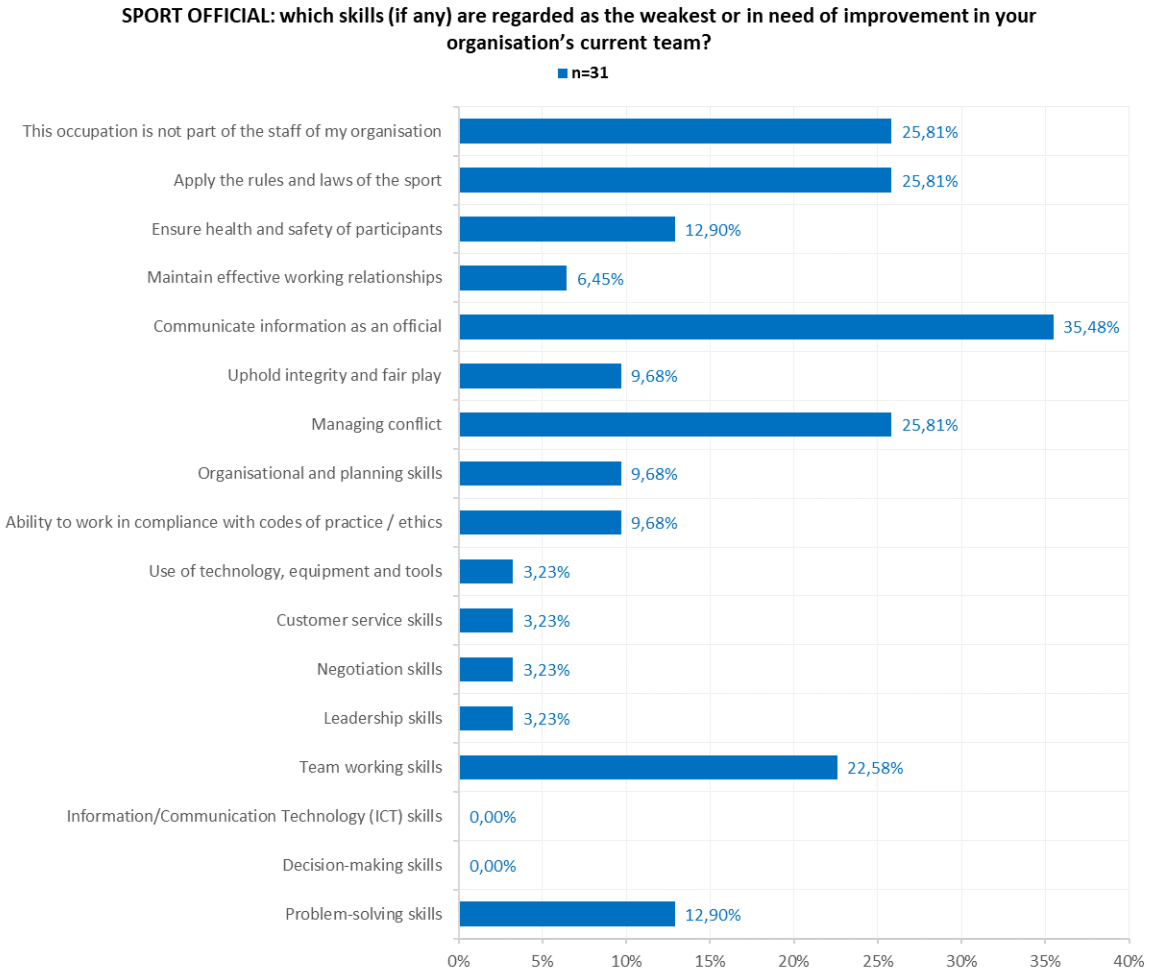


Figure 7.15: Weakest skills or in need for improvement (sport official)



5) Senior management staff

In relation to the senior management staff, employers (n=167) stress team working skills (93%), leadership skills (90%), decision-making skills (89%), problem-solving skills (85%), and verbal communication skills (82%) as most essential (see figure 7.16). When it comes to areas where the respondents (n=123) believe that there is room for improvement, business development skills (29%), the ability to facilitate innovation (28%), leadership skills (24%), the ability to lead change (22%), and use of technology, equipment and tools (22%) are highlighted (see figure 7.17).

As senior management staff have leading positions, it is noteworthy that almost one-fourth of the respondents' state that there is room for improvement within the area of leadership. Other weaknesses identified by the respondents is the ability to lead change and facilitating innovation.

Figure 7.16: Important skills for senior management staff

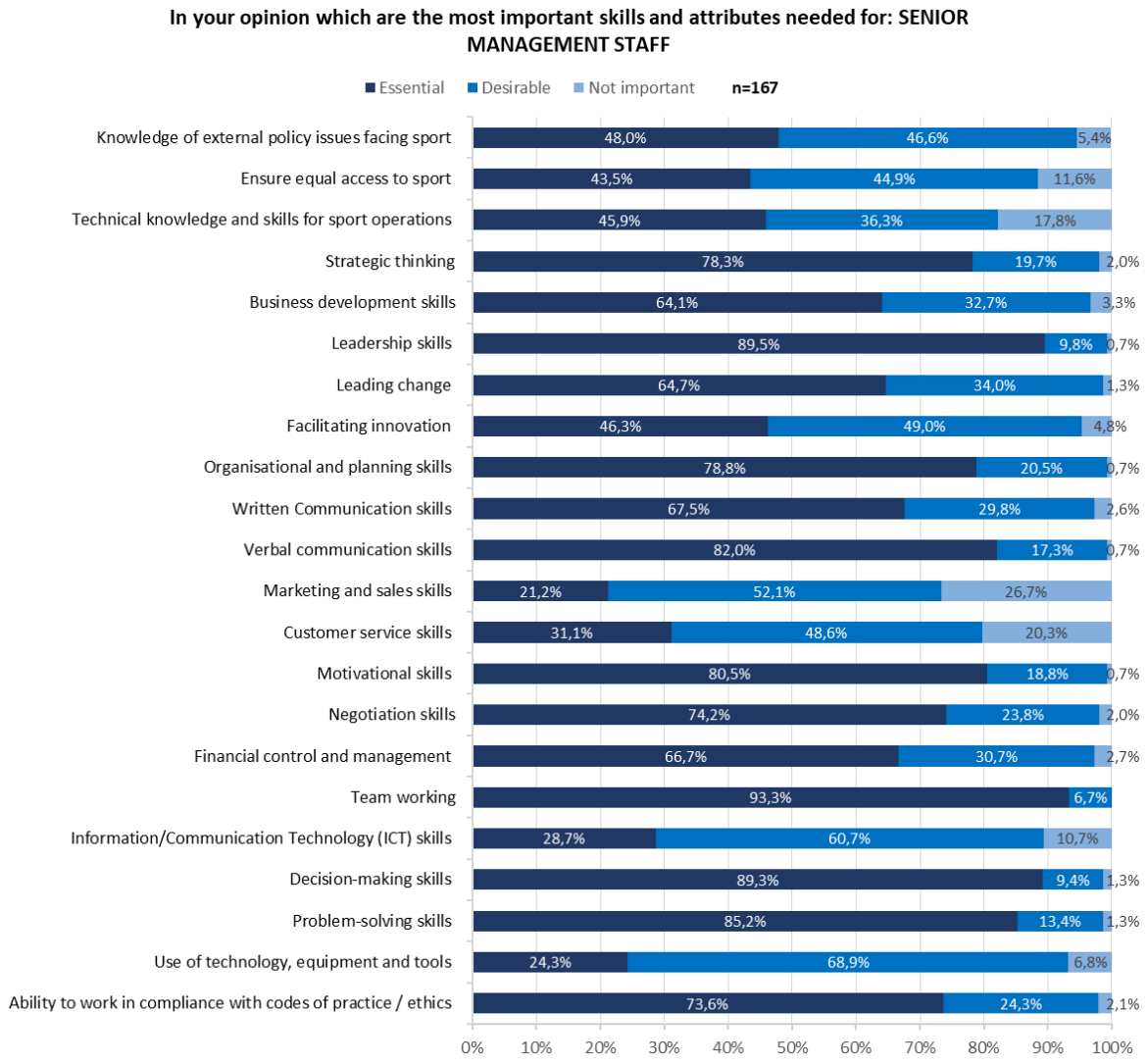
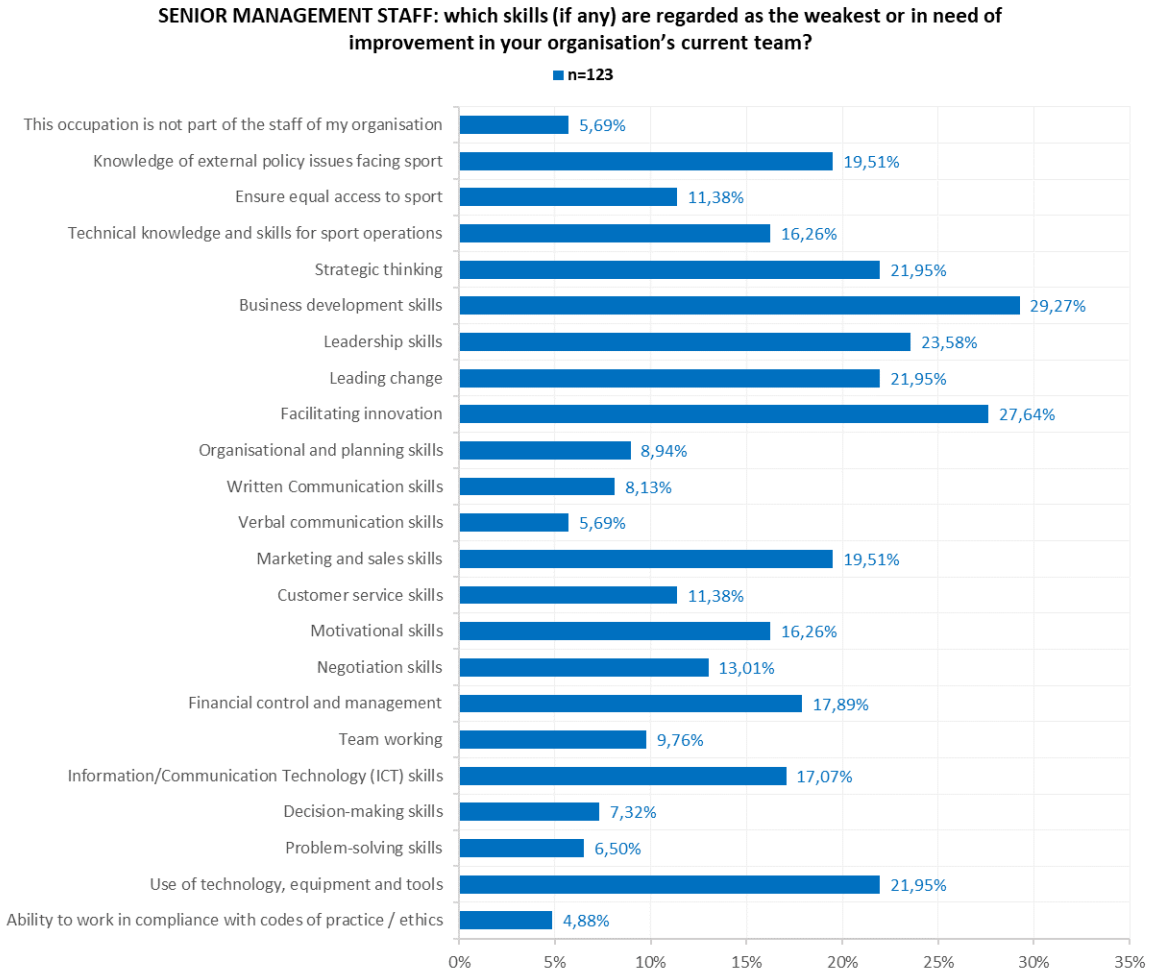


Figure 7.17: Weakest skills or in need for improvement (senior management staff)



6) Middle management staff

Some of the areas mentioned by the respondents as essential for senior management staff are also highlighted as essential for middle management staff (n=96), such as team working (95%), leadership skills (83%), and verbal communication skills (74%) (see figure 7.18). Other areas that the respondents stress as essential are motivational skills (83%) and the ability to work in compliance with code of practice/ethics (74%).

The similarities between the categories are also present when the respondents (n=67) rank areas where there is room for improvement. Leading change (30%), business development skills (27%), leadership skills (27%), and facilitating innovation (25%) are identified as the weakest areas within the organisations (see figure 7.19).

Figure 7.18: Important skills for middle management staff

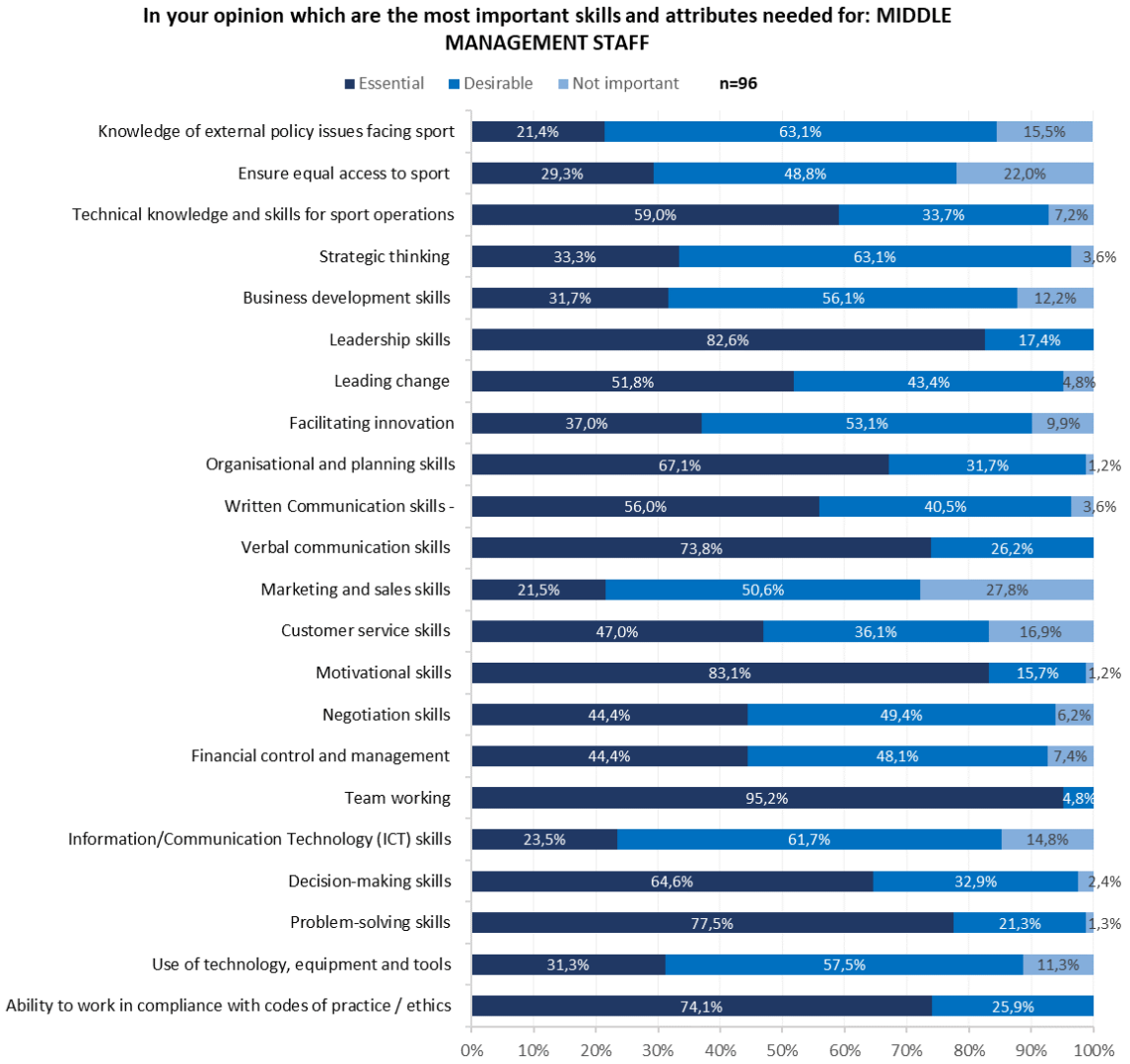
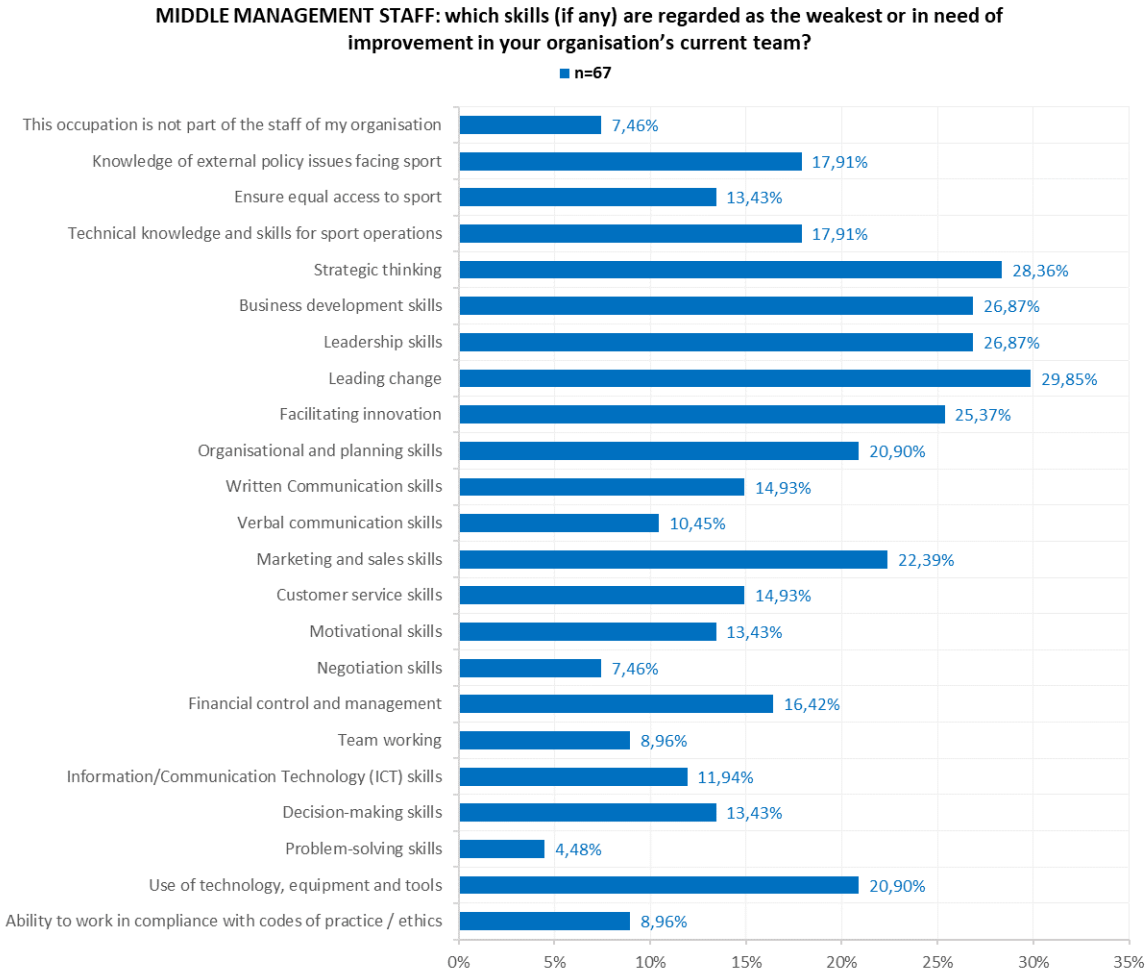


Figure 7.19: Weakest skills or in need for improvement (middle management staff)



7) Operational staff

For operational staff, the employers (n=102) stress that technical skills and knowledge required for their role (83%), team working skills (80%), ability to work in compliance with codes of practice/ethics (71 %), customer service skills (65%), and communications skills (51%) are areas with particular importance (see figure 7.20).

Basically, the same skills that are mentioned as essential are also listed by the respondents (n=75) as areas where there is room for improvement. Communications skills (31%), team working skills (25%), technical skills and knowledge required for their role (24%), and the ability to work in compliance with codes of practice/ethics (23%) are also considered the weakest areas (see figure 7.21).

Figure 7.20: Important skills for operation staff

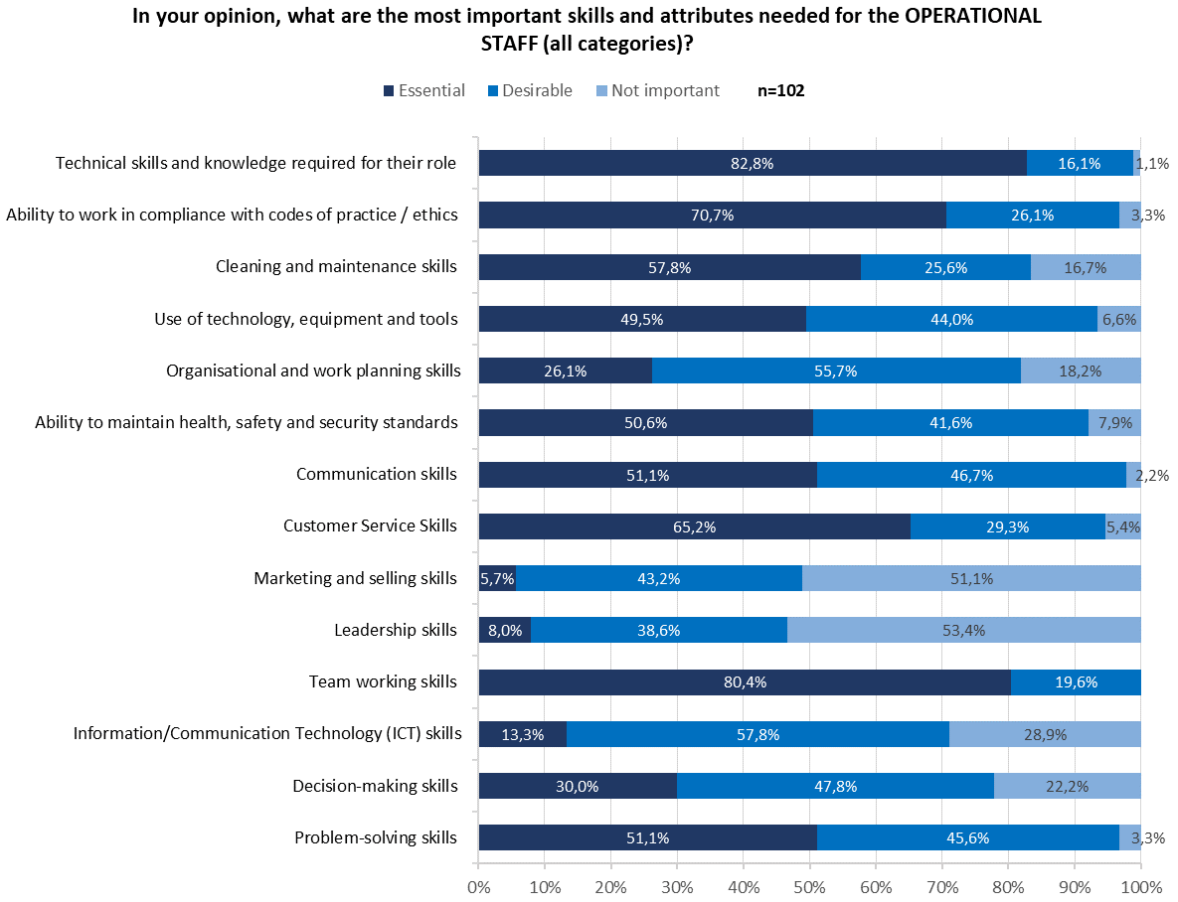
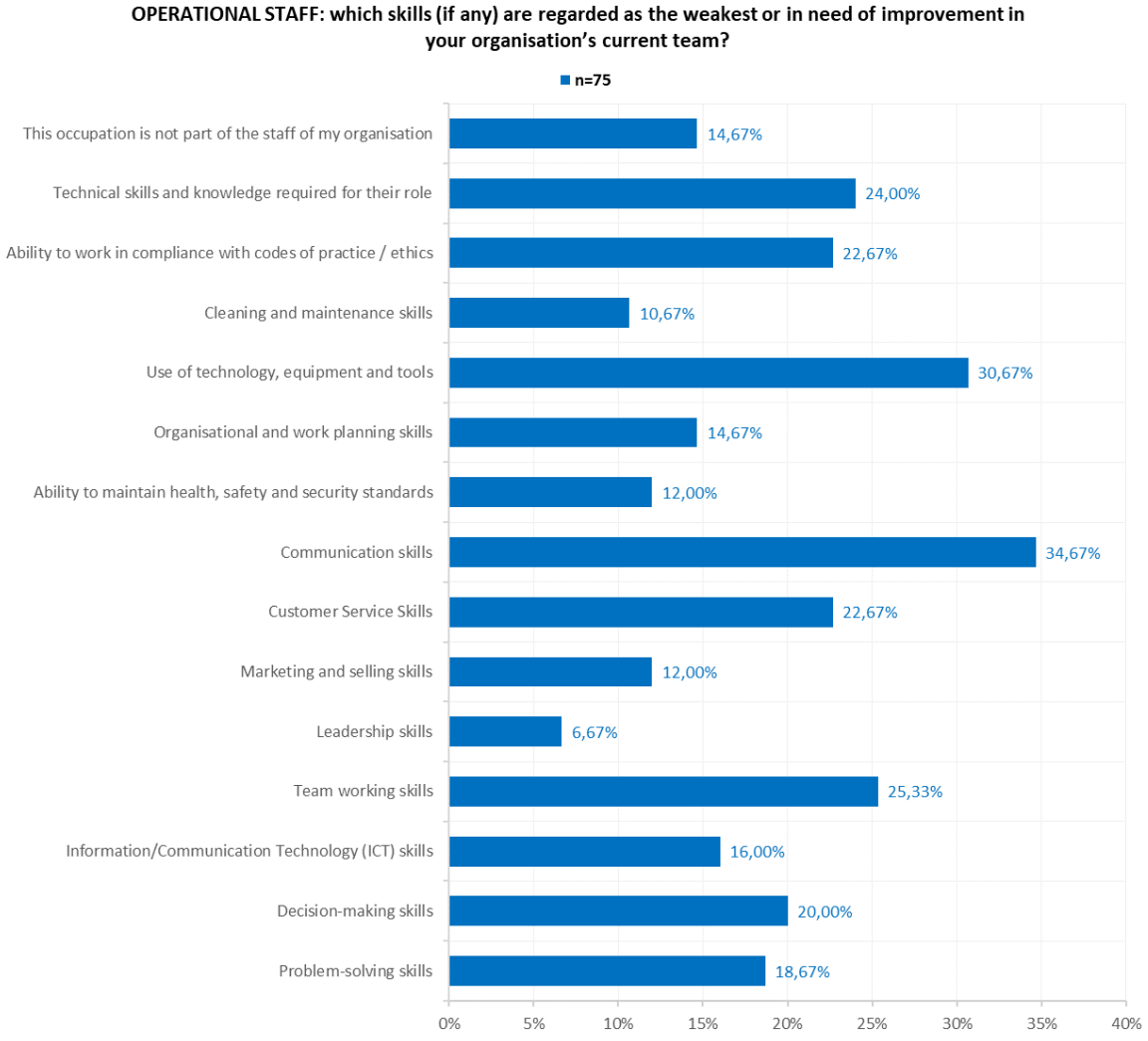


Figure 7.21: Weakest skills or in need for improvement (operational staff)



8) Clerical and office staff/receptionist

In relation to clerical and office staff/receptionists, the employers (n=150) state that administration skills (93%), team working skills (91%), the ability to understand written documents and write clearly (86%), technical skills and knowledge required for the role (79%), and communication skills (76%) are essential for the job (see figure 7.22). However, these skills and attributes are to a high extent generic for people working as office staff/receptionist.

When it comes to the skills that are weakest/in need of improvement, the employers (n=106) stress organisational and planning skills (28%), use of technology, equipment and tools (28%), communication skills (26%), information/communication technology (ICT) skills (25%), and technical skills and knowledge required for th2 role (23%) (see figure 7.23).

Figure 7.22: Important skills for middle clerical and office staff/receptionist

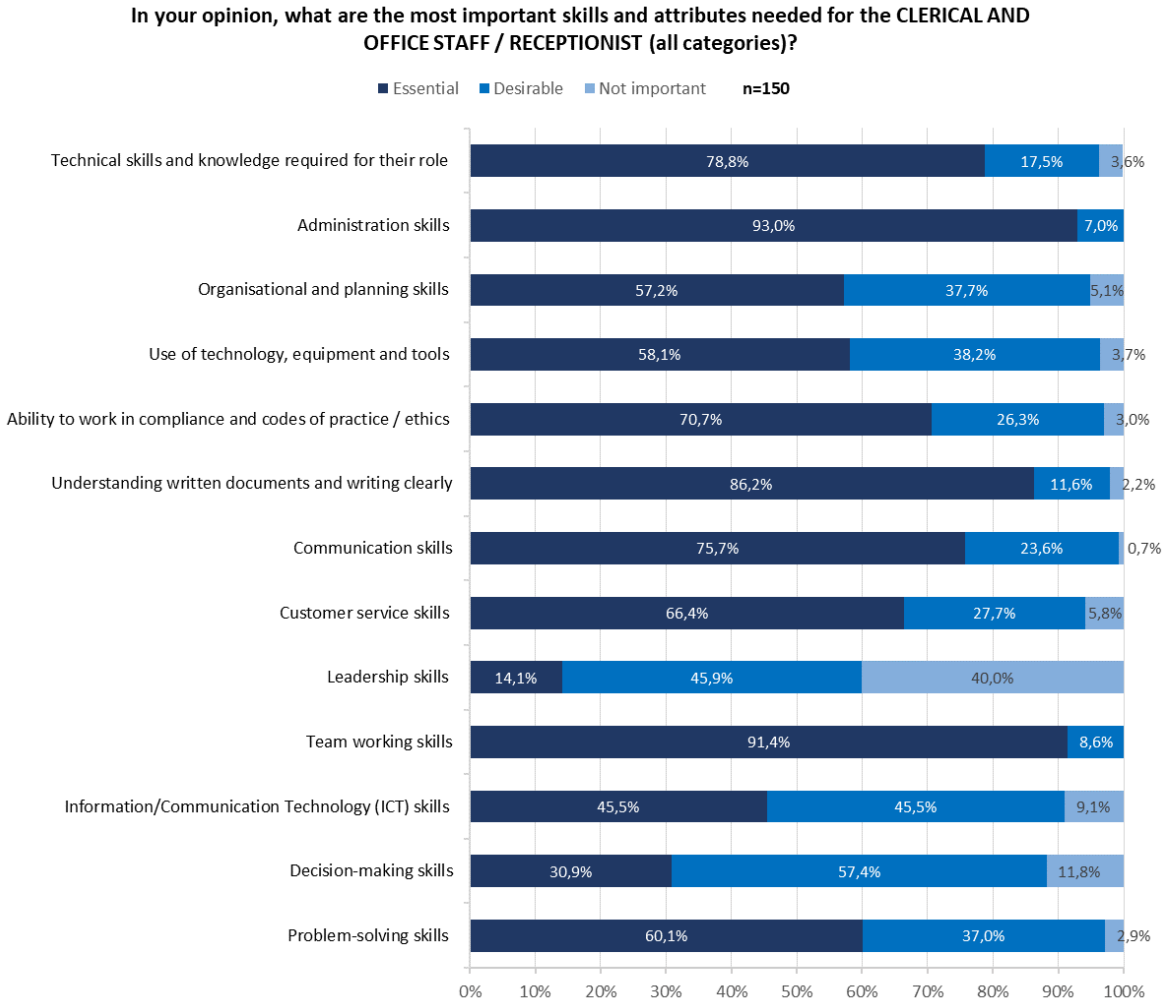
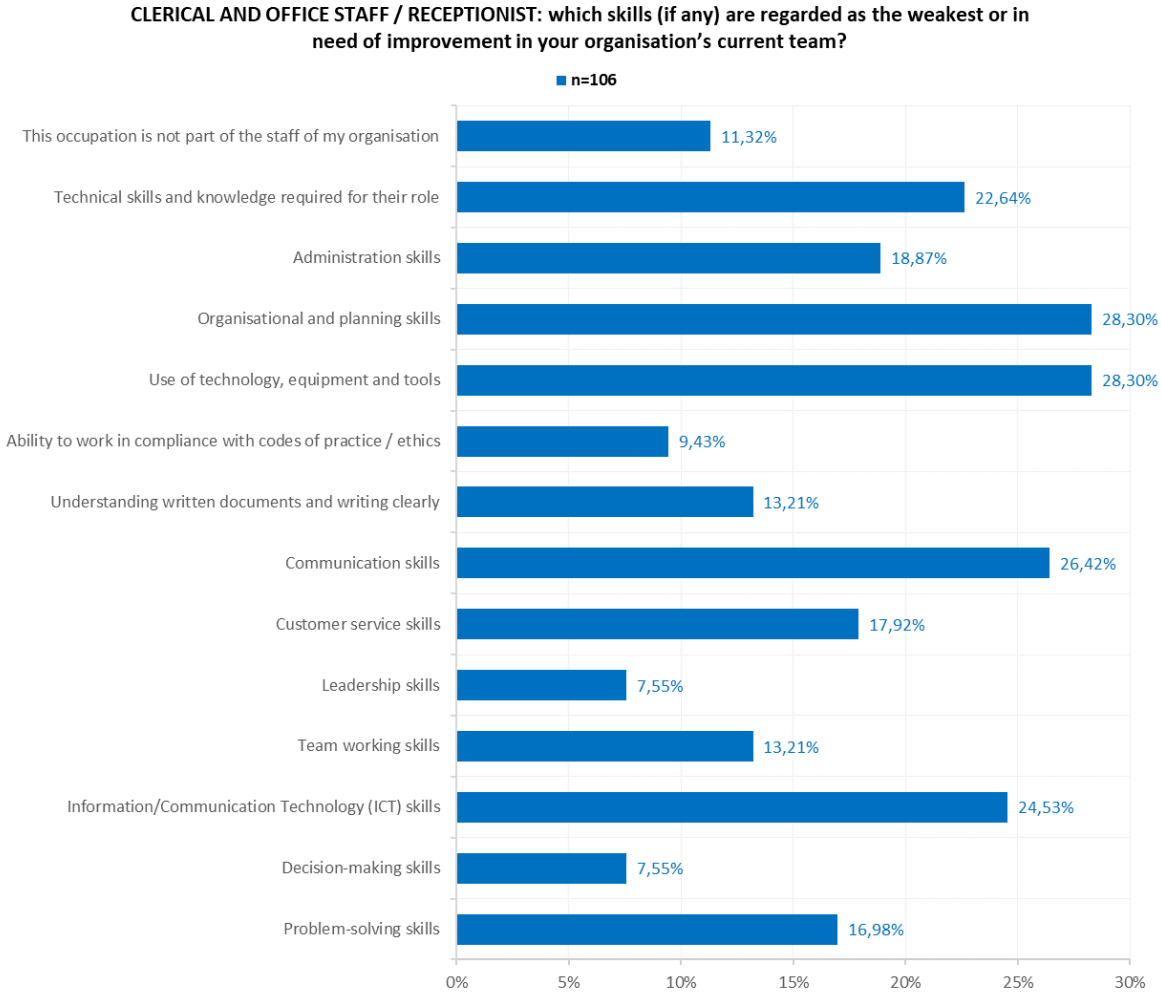


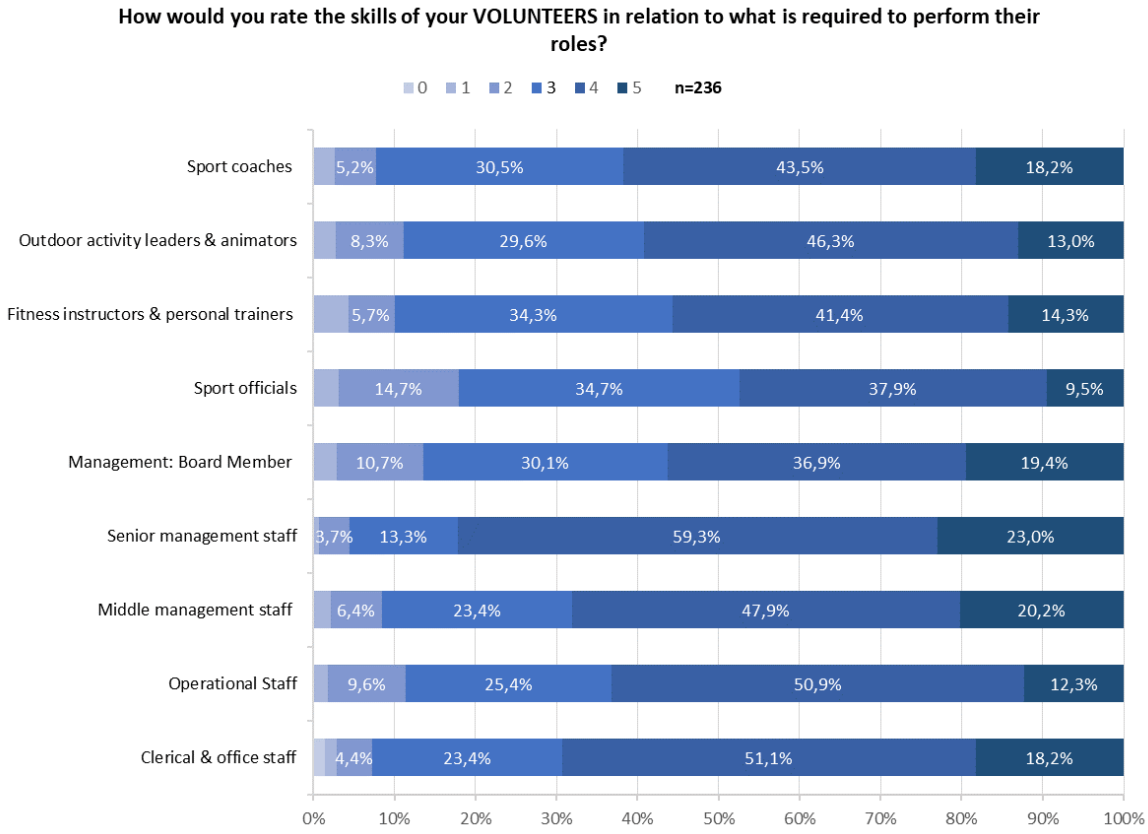
Figure 7.23: Weakest skills or in need for improvement (clerical and office staff/receptionist)



9) Skills of volunteers

Employers were further asked to rate their volunteers in relation to what is required to perform their roles (n=236) (see figure 7.24). The three occupations that have the highest rating are senior management staff; clerical & office staff; and middle management staff.

Figure 7.24: Skills of volunteers



c) Recruitment of paid staff and volunteers

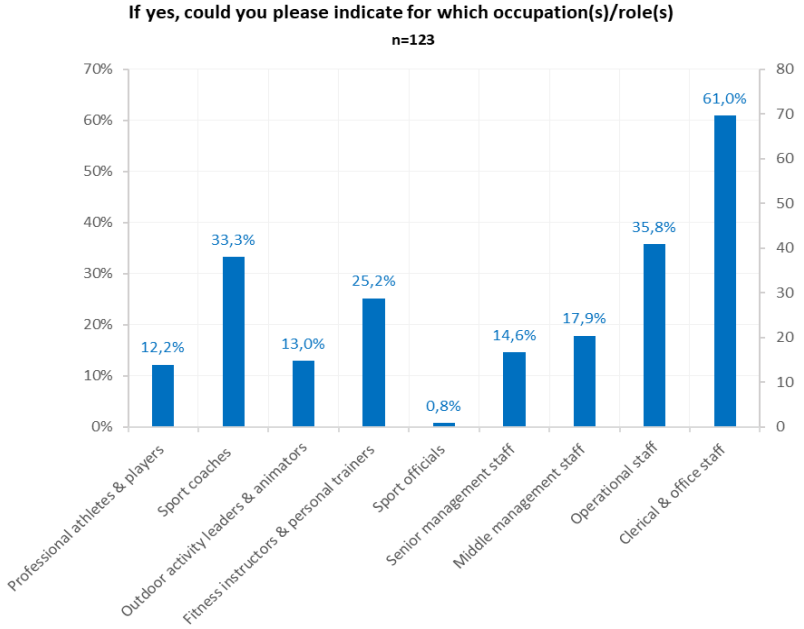
1) Recruitment in the past 12 months

Respondents were further asked whether their organisation has recruited or attempted to recruit paid employees within the past 12 months, and 49% of the respondents answered 'yes' to that question (see figure 7.25).

Figure 7.25: Recruitment of staff

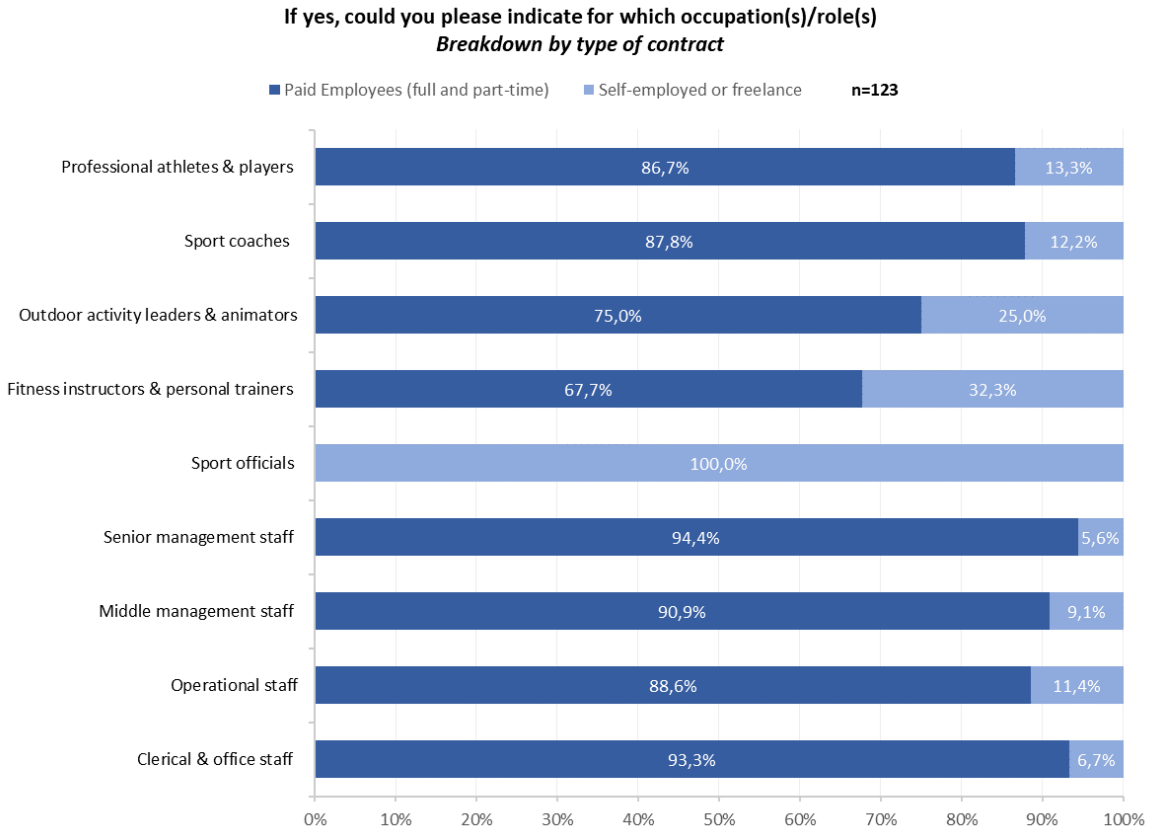
Employers, who answered yes on the recruitment question, got a follow-question asking for which occupation(s) and/or role(s). Here, 61% of the respondents stated that they recruited clerical and office staff, while about one third answered that they had recruited/attempted to recruit sports coaches (33%) and operational staff (36%) (see figure 7.26).

Figure 7.26: Recruitment across occupations



An overwhelming majority are paid employees (see figure 7.27). Yet, almost one third (32%) of the fitness instructors and personal trainers are self-employed or freelance. Also, outdoor activity leaders and animators are relatively self-employed/freelance (25%). The lowest rate of self-employment/freelance is among senior management staff (94%), clerical and office staff (93%), and middle management staff (91%). All sports officials (100%) are hired on a freelance basis.

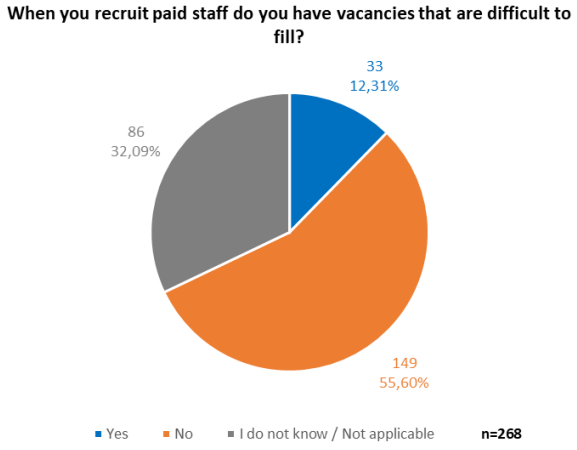
Figure 7.27: Recruited occupations



2) Difficulties recruiting paid staff

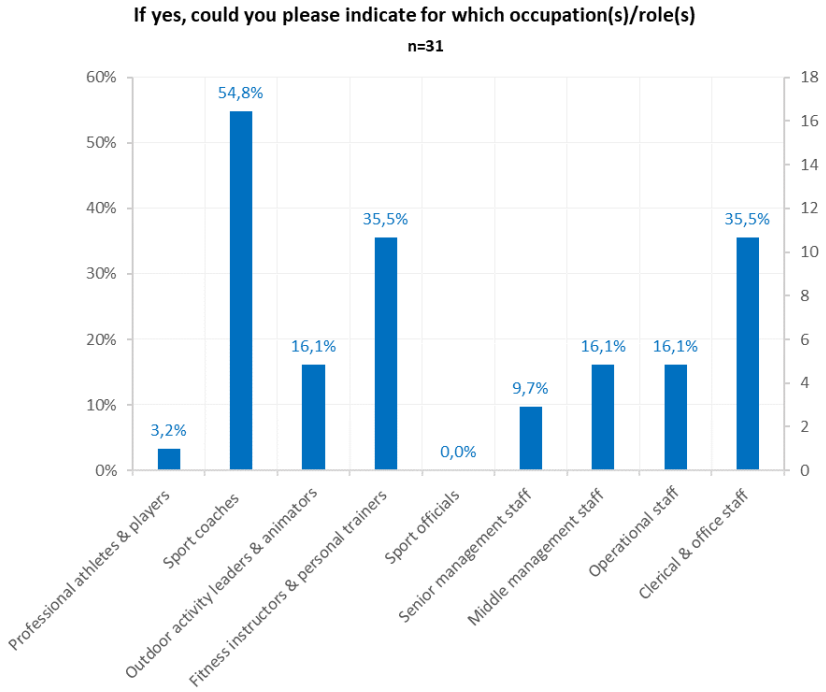
Furthermore, in relation to recruitment 12% of employers stated to have vacancies that are difficult to fill (figure 7.28).

Figure 7.28: Vacancies



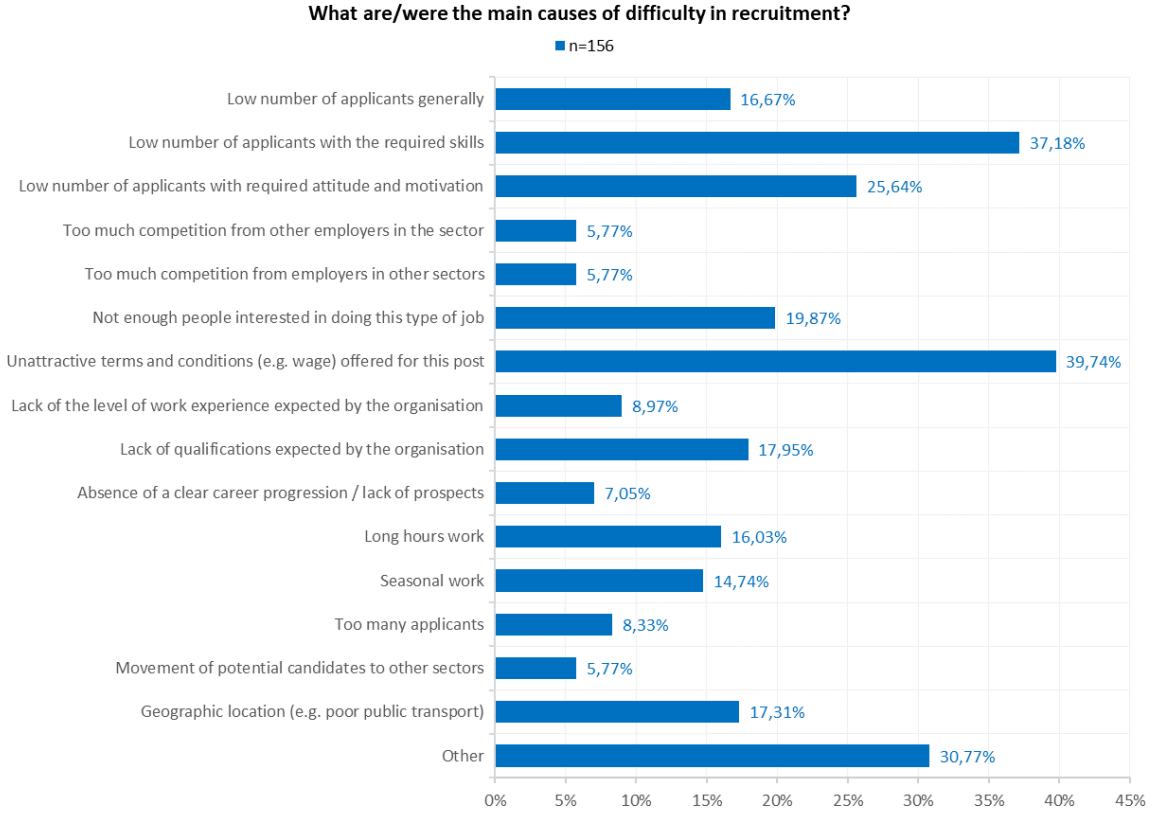
The vacancies that are most difficult to fill according to the employers (n=31) are sports coaches (55%), clerical and office staff (36%), and fitness instructors and personal trainers (36%) (see figure 7.28).

Figure 7.28: Recruitment of occupations



When asked about the main causes of difficulty in recruitment, unattractive terms and conditions (e.g. wage) offered for the post (40%), low number of applicants with the required skills (37 %), and low number of applicants with the required attitude and motivation (26%) are the main challenges (see figure 7.29). Factors such as competition from other employers in the sector (6%), competition from employers in other sectors (6%), and movement of potential candidates to other sectors (6%) are seen as minor challenges.

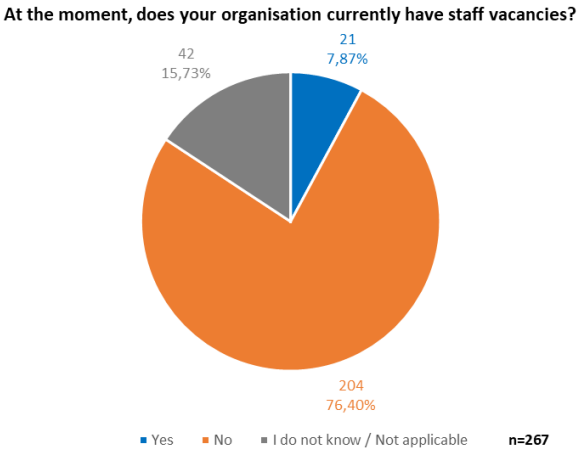
Figure 7.29: Difficulties in recruitment



3) Current staff vacancies

Employers was further asked if they currently have staff vacancies in their organisation, and 8% answered 'yes' to that question (see figure 7.30).

Figure 7.30: Staff vacancies



Those answering 'yes' were asked to indicate for which occupations they had vacancies (see figure 7.31 and 7.32).

Figure 7.31: Staff vacancies across occupation

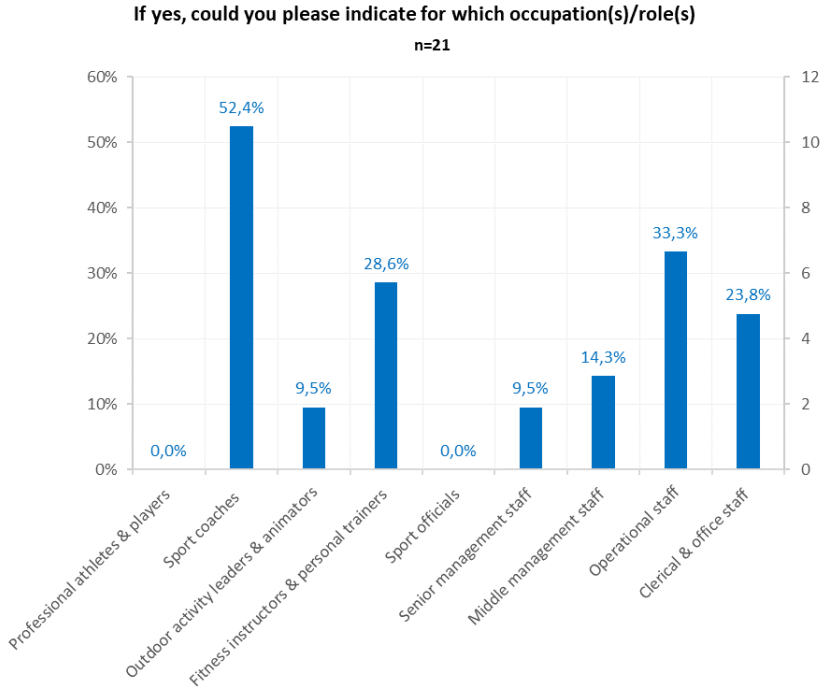
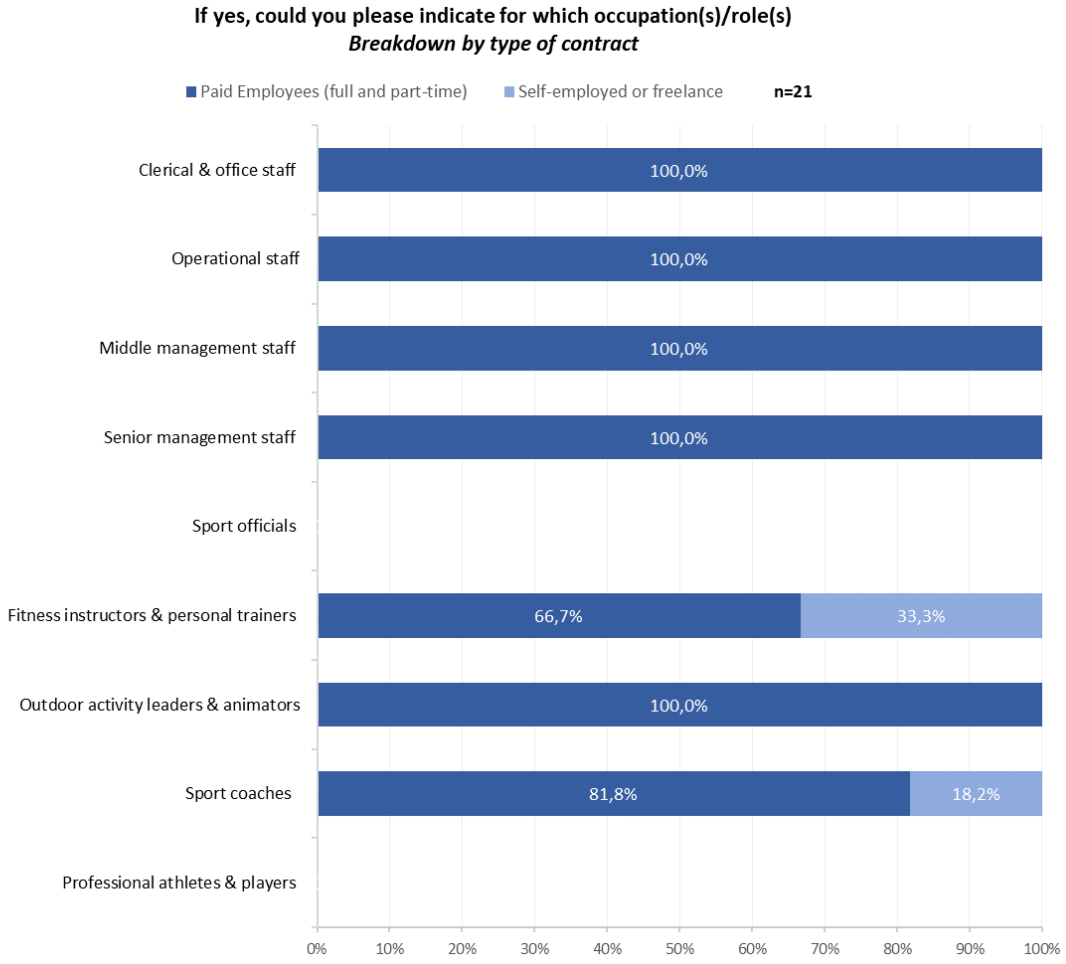


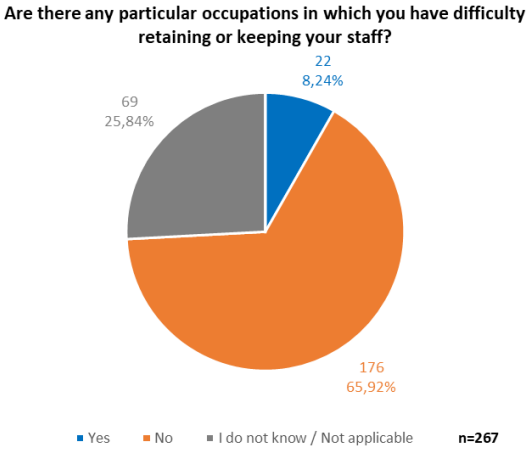
Figure 7.32: Type of contract staff vacancies



4) Difficulties retaining paid staff

Employers were then asked there are any occupations where they have difficulties in retaining or keeping staff (figure 7.33).

Figure 7.33: Difficulties in retaining staff



Among the small minority who answered 'yes', organisations have most difficulties in retaining fitness instructors and personal trainers (40%), sport coaches (30%), and operational staff (25%) (see figure 7.34).

These are the same professions where the organisations experienced vacancies. However, it is difficult to draw any general conclusions due to the small sample. The most frequently used reason for why it is difficult to retain staff is lack of commitment to the job/organisation (43%) and better pay offered in other job roles (29%) (see figure 7.35).

Figure 7.34: Difficulties in retaining staff across occupations

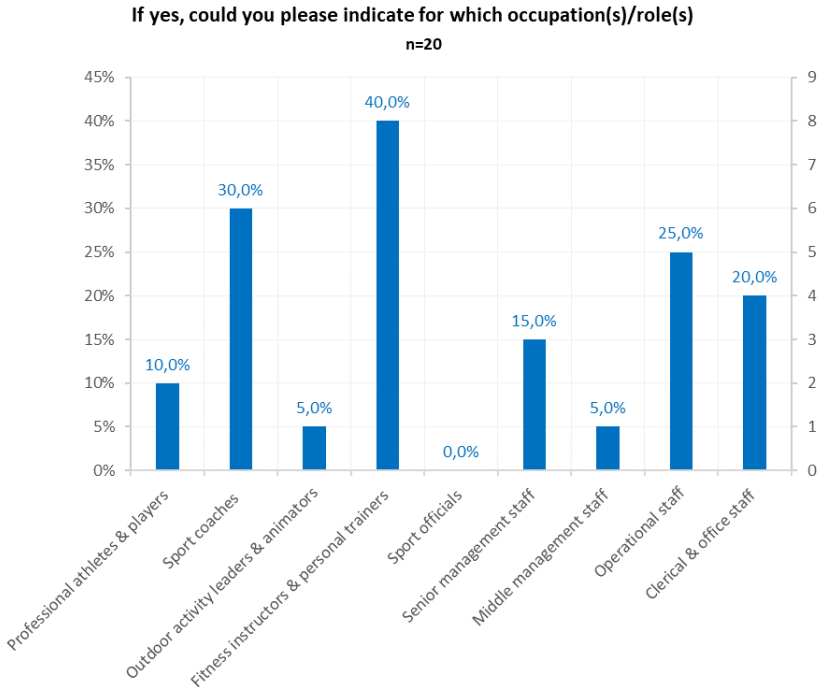
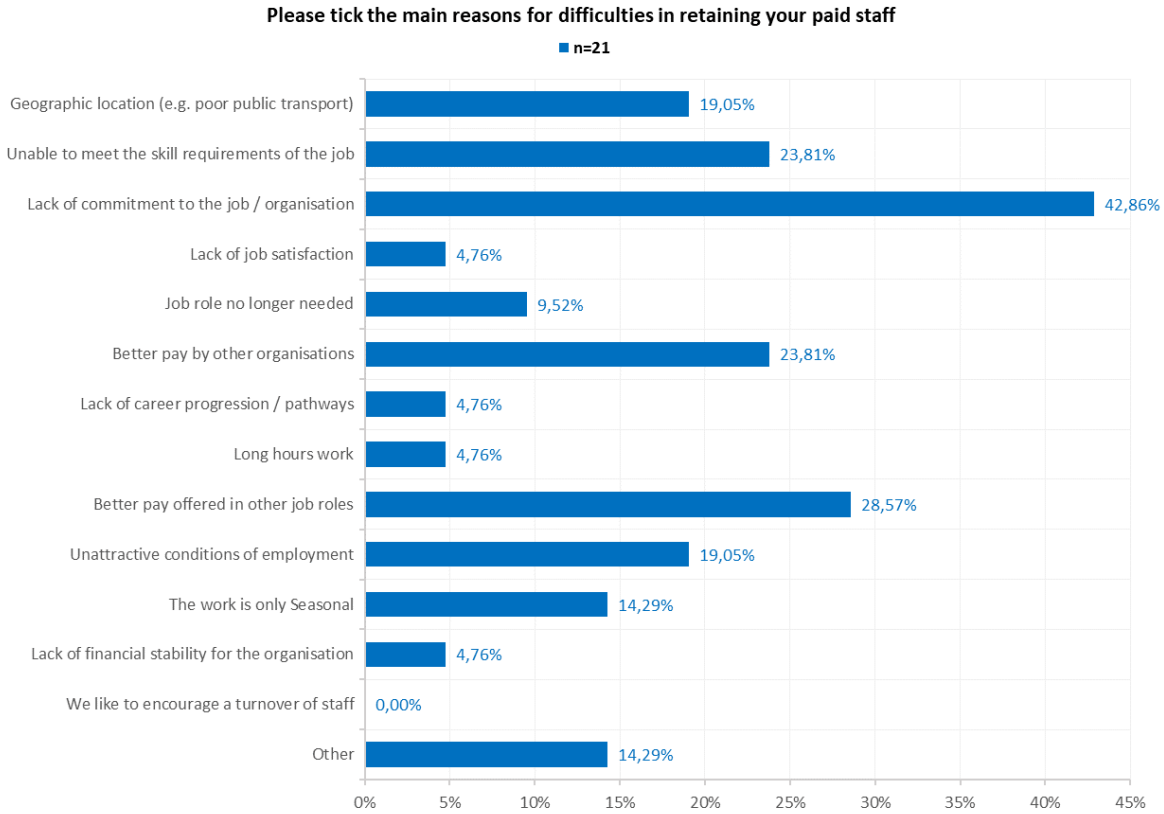


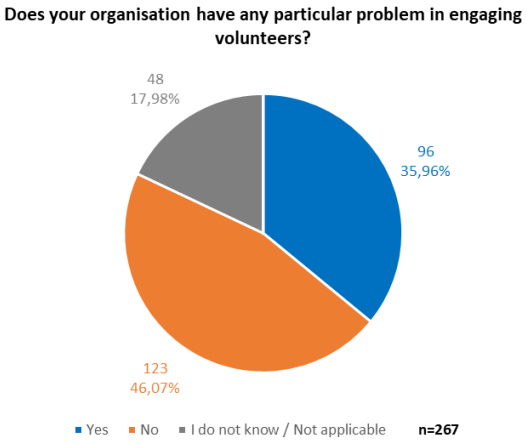
Figure 7.35: Reasons behind difficulties in retaining staff



5) Engaging volunteers

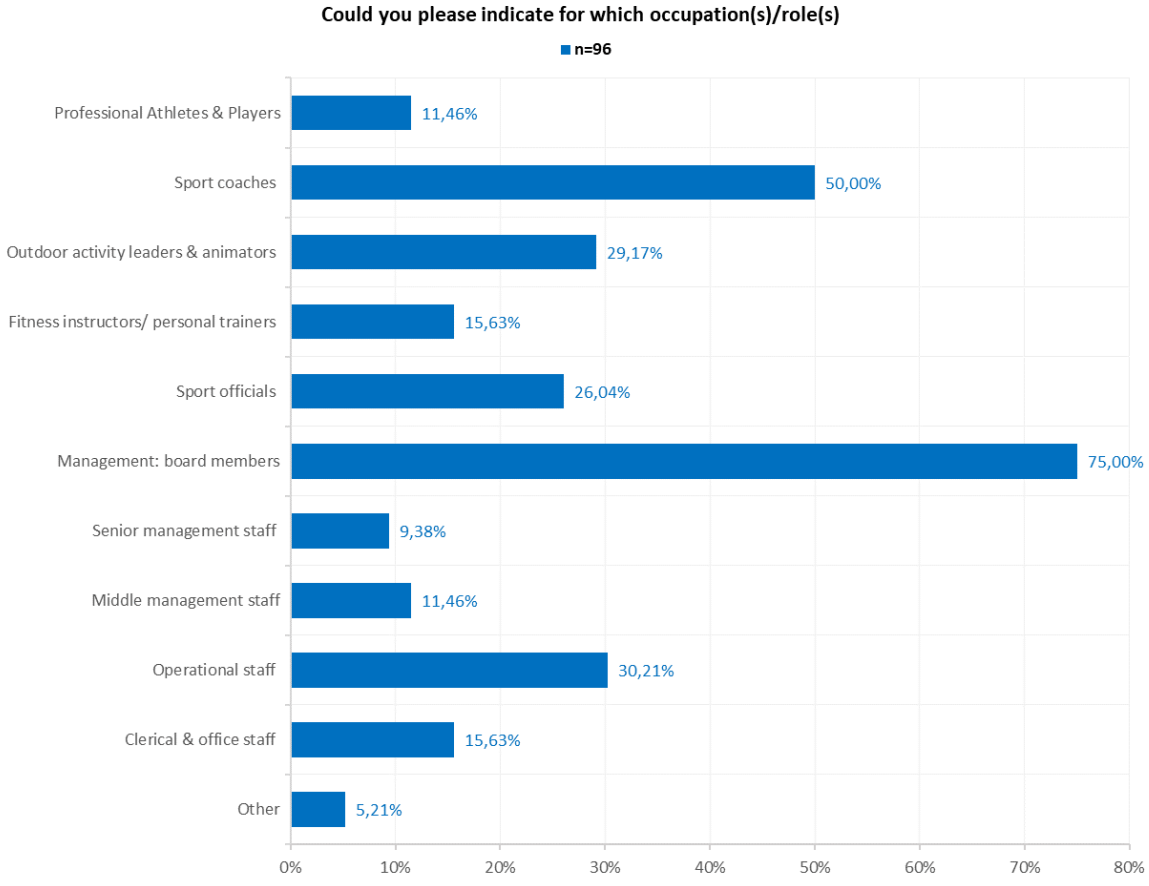
More than one third (36%) stress that they have a problem in engaging volunteers (see figure 7.36).

Figure 7.36: Engaging volunteers



For those answering 'yes', the most frequent position for which it is difficult to engage volunteers are (75%), sport coaches (50%), operational staff (30%), and outdoor activity leaders and animators (29%) (see figure 7.37).

Figure 7.37: Difficulties in engaging volunteers across roles

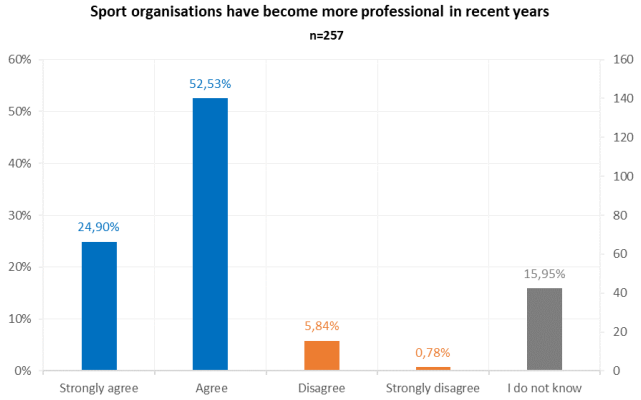


d) Working in sport and physical activity – key issues

In this section respondents were presented for different statements and asked to indicate their level of agreement from “strongly disagree” to “strongly agree” (1-5).

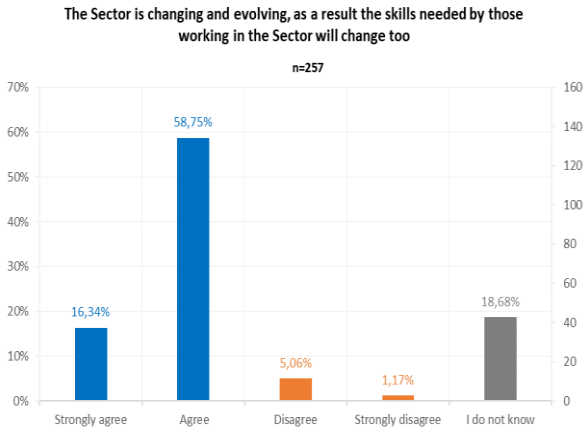
Most of the of the respondents agree with the statement that sports organisations have become more professionalised in recent years (see table 7.38). However, there are a fair amount of respondents (16%), who answer that they do not know.

Figure 7.38: Sport organisations have become more professional



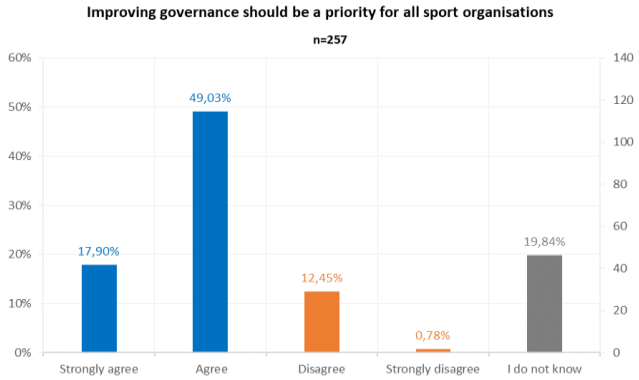
Most respondents also agree/strongly agree with the statement that ‘The sector is changing and evolving, as a result the skills needed by those working in the sector will change too’ (see table 7.39).

Figure 7.39: The sector is changing and envolving



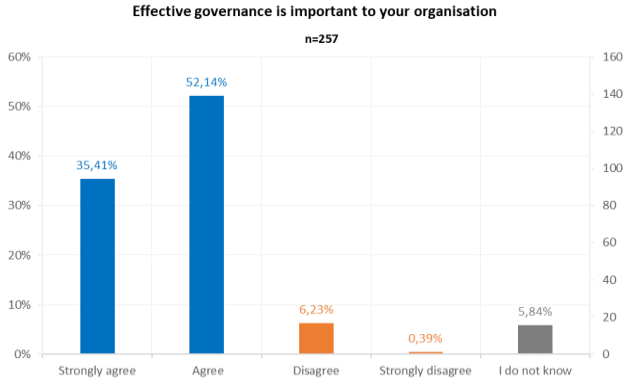
A majority of the respondents also agree with statement that improving governance should be a priority for all sport organisations, while one fifth (20%) answers ‘I do not know’ (figure 7.40).

Figure 7.40: Improving governance



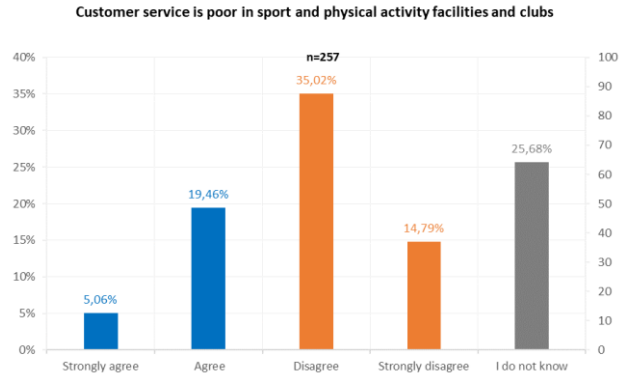
A clear majority agree with the statement that effective governance is important to the organisation (see figure 7.41). However, it would be very surprising if it was not so.

Figure 7.41: The importance of governance



One fourth of the respondents agree/strongly agree with the statement 'Customer service is poor in sport and physical activity facilities and clubs' (see figure 7.42). Comparing with figure 7.13 (fitness trainers/personal trainers) and 7.21 (operational staff) where respondents were asked about weakest skills/skills in most need of improvement respectively 13% and 23% selected 'customer service skills'.

Figure 7.42: Customer service is poor



Much in line with the statement in figure 7.39 ('The sector is changing and evolving, as a result the skills needed by those working in the sector will change too'), respondents experience that the skills required in their own organisation is changing as well (figure 7.43), and following this a majority of the respondents believe that demand for a better qualified workforce operating in the sport sector will increase in the future (see figure 7.44).

Figure 7.43: Required skills

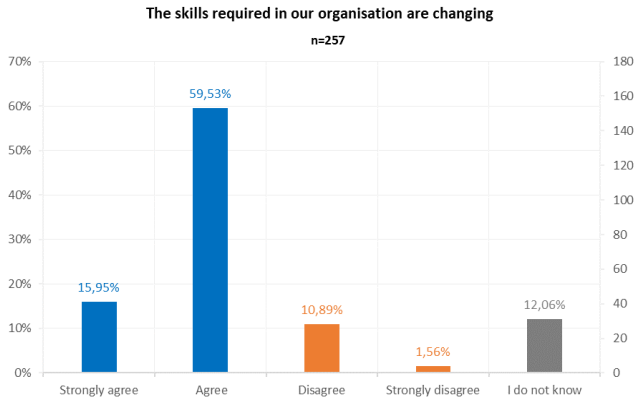
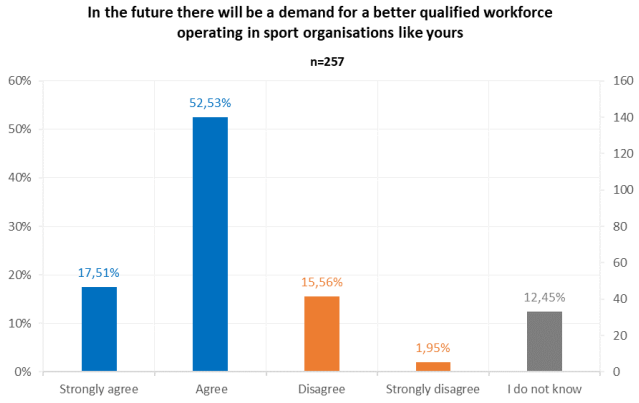
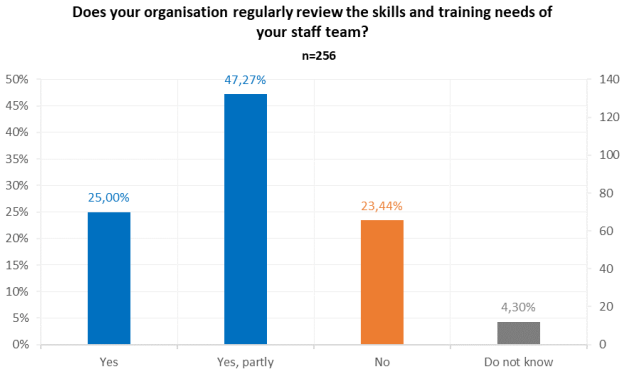


Figure 7.44: Future demand



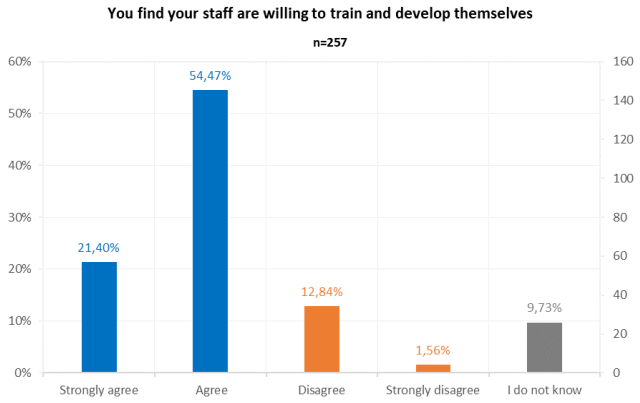
Most organisations participating in the survey state that they regulary review the skills and training needs of their staff (see figure 7.45).

Figure 7.45: Regular review of skills and training needs



As many of the respondents experience that the sector is changing and evoling there could be a need for the staff to train and develop to meet new skills requirements, and 76% of the responents agree/strongly agree that their staff are willing to train and develop themselves (see figure 7.46).

Figure 7.46: Willingness to train and develop

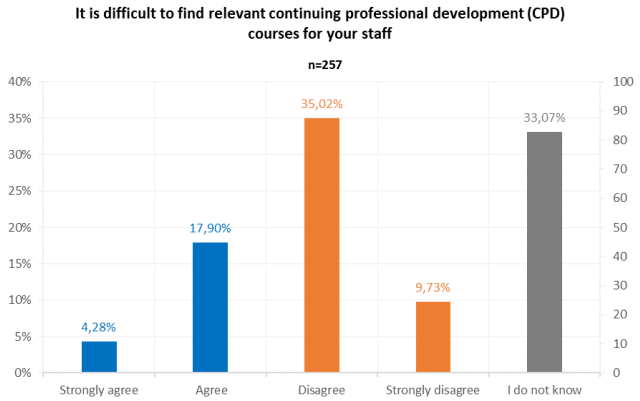


Moreover, employers acknowledge the importance of staff having access to ongoing training to keep their skills up to date – 88% agree/strongly agree with this statement (see figure 7.47).

Figure 7.47: Access to on-ongoing training

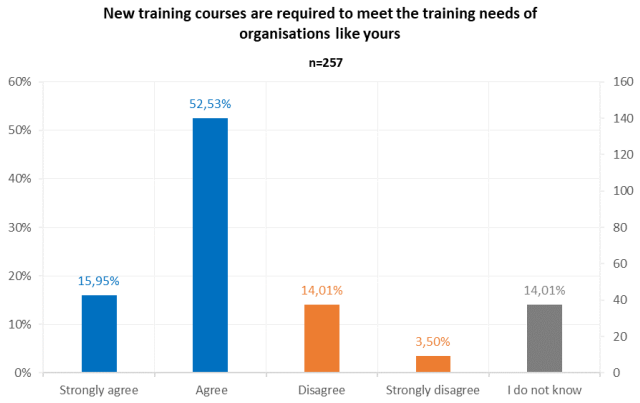
Although one third of respondents state that they do not know, almost 45% of the respondents disagree with the statement that it is difficult to find relevant continuing professional development (CPD) courses for their staff (see figure 7.48). Thus, it seems as if there are opportunities (for staff) to develop within their field. Yet, 22% do find it difficult to find relevant courses.

Figure 7.48: Continuing professional development



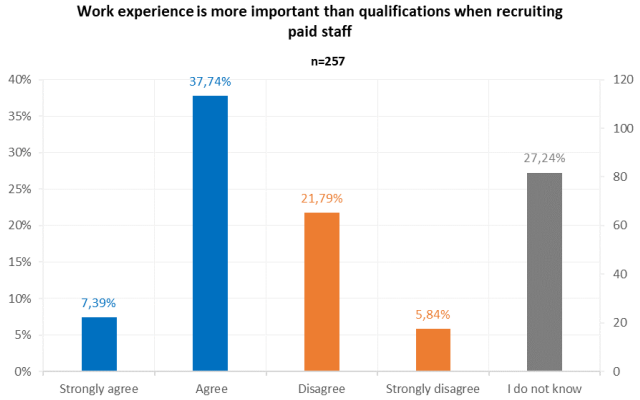
Further, the respondents believe that there is a need for new training courses and 68% agree/strongly agree with the statement (see figure 7.49).

Figure 7.49: New training courses



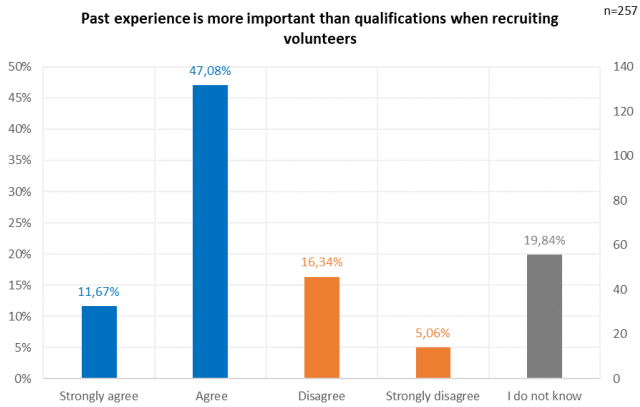
About 45% of the respondents agree/strongly with the statement that work experience is more important than formal qualifications when recruiting paid staff (see figure 7.50). One interpretation could be that the new skills and qualifications are obtained through work exprerience rather than formal education.

Figure 7.50: Work experience



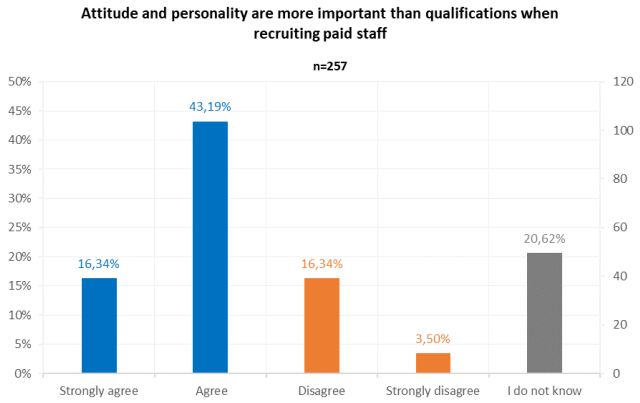
In line with figure 7.50 above, employers agree with the statement that past experience is more important than formal qualifications when recruiting volunteers (see figure 7.51).

Figure 7.51: Past experience



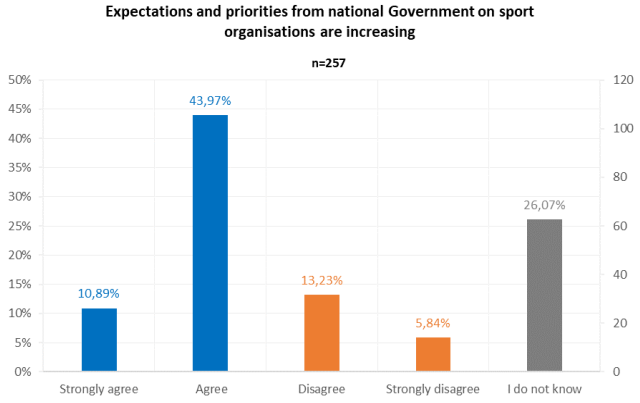
More than half of the respondents agree with the statement that attitude and personality is more important than qualifications when recruting paid staff (see figure 7.52). Again, many of the respondents answer that they do not know (21%).

Figure 7.52: Importance of attitude and personality



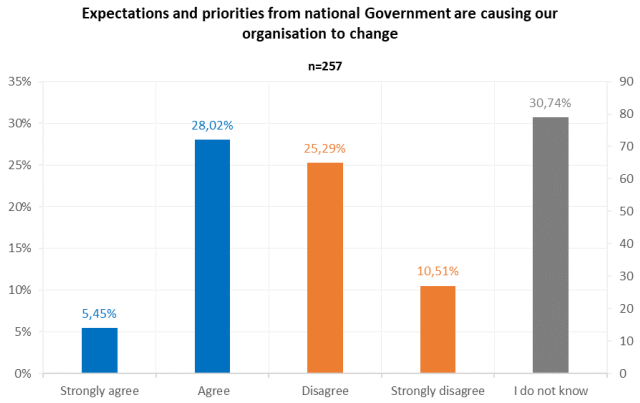
More than half (54%) of the respondents agree with the statement 'Expectations and priorities from the national government on sport organisations are increasing' (see figure 7.53).

Figure 7.53: Expectations and priorities from national government



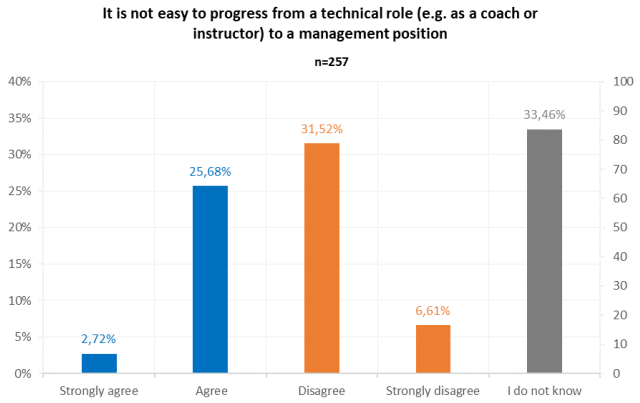
Although many respondents experience increased expectations and priorities from the national government, only one third state that these expectations and priorities have resulted in organisational change (see figure 7.54).

Figure 7.54: Organisational change due to expectations and priorities from national government



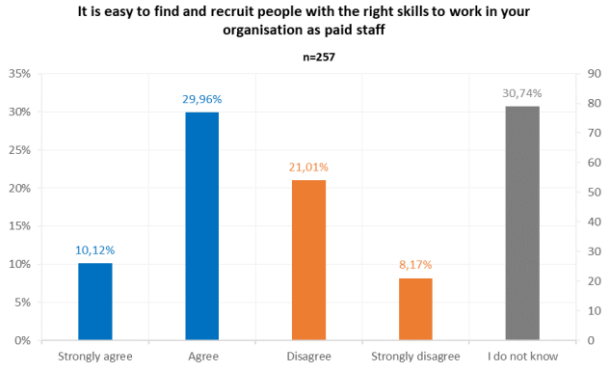
Again, the uncertaintity is relatively high with regard to the statement that it is not easy to progress from a technical role to a management position (see figure 7.55). One third (33%) of the repondents state that they do not know. One explanation could be that not many respondents have experienced this transition.

Figure 7.55: From technical to management position



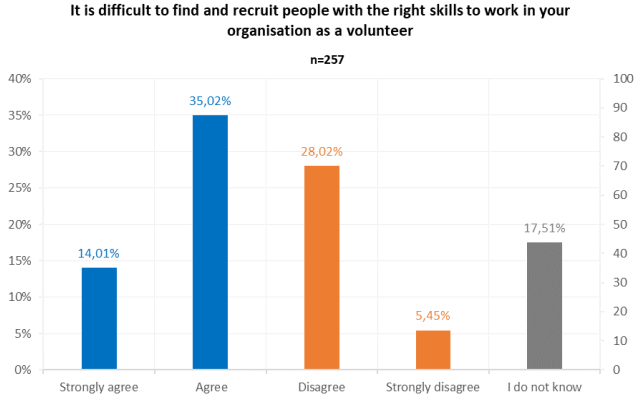
The same pattern is found in the statement 'It is easy to find and recruit people with the right skills to work in your organisation as paid staff' (see figure 7.56). In comparison (see figure 7.30 and 7.33) more than three-fourths and two-thirds, respectively, state that they do not have staff vacancies and do not have difficulties in recruiting staff.

Figure 7.56: Easy to find and recruit people



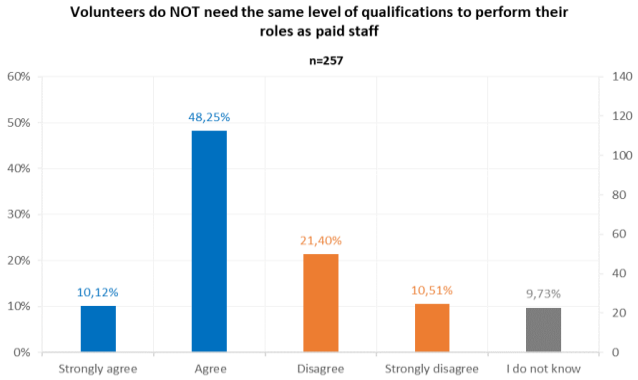
In relation to volunteers, the respondents were asked whether it is difficult to recruit people with the right skills. One third of the respondents disgagree with the statement while 49% agree/strongly agree (see figure 7.57). From figure 7.37 it appears that organisations have most difficulties in finding volunteers for the tasks as board members, sport coaches and operational staff.

Figure 7.57: Difficulties to recruit volunteers



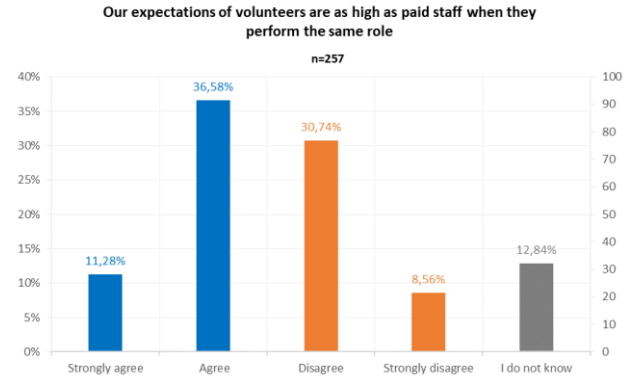
However, a majority the respondents agree that volunteers do not need the same level of qualifications to perform their roles as paid staff (see figure 7.58). Unfortunately, there is no information on what kind of roles.

Figure 7.58: Volunteers' level of qualification



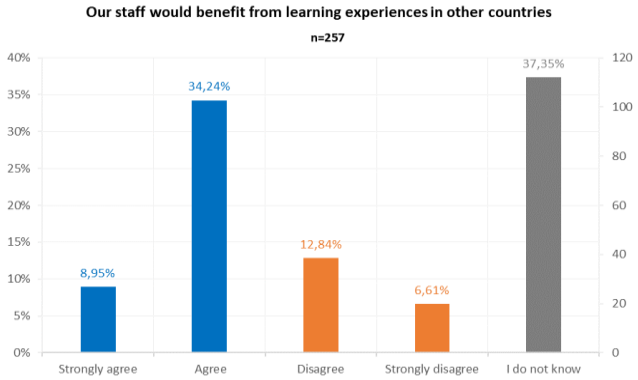
On the statement 'Our expectations of volunteers are as high as paid staff when they perform the same role' 48% agree/strongly agree, while 39% disagree (see figure 7.59). It is interesting in relation to the information in figure 7.58, where most respondents stated that the volunteers did not need the same level of qualification. Although this can seem contradictive, it is possible that paid staff and volunteers are recruited for different roles.

Table 7.59: The same expectations on volunteers



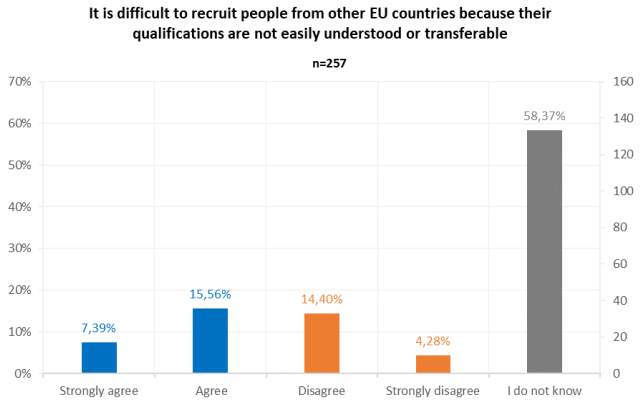
In relation to the statement 'Our staff would benefit from learning experiences in other countries', 37% of the respondents answer that they do not know (see figure 7.60). Thus, it is likely many of the respondents do not have experience with the exchange of learning in other countries.

Table 7.60: Learning experiences in other countries



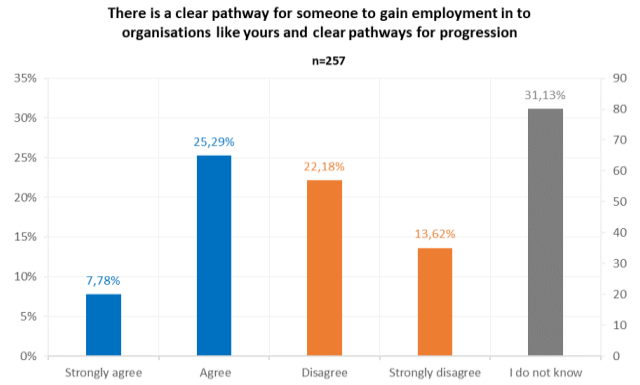
The uncertainity is even more pronounced when it comes to recruiting individuals from other EU countries. More than half (58%) of the respondents answer that they do not know whether it is difficult to recruit people from other EU countries (see table 7.61). Thus, most respondents do not have any experience of recruiting people from outside Denmark.

Table 7.61: Recruitment of people from other EU countries



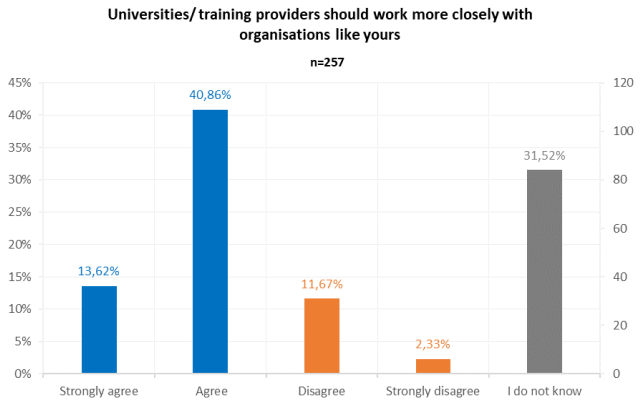
On the statement "There is a clear pathway for someone to gain employment in to organisations like yours and clear pathway for progession," there is again a large number of respondents, who answer that they do not know (see table 7.62). However, about one-third (34%) of the respondents agree with the statement.

Table 7.62: Clear pathway



Although many of the respondents, who answer "I do not know" to the statement that universities/training providers should work more closely with organisations like the respondents', more than half of the respondents agree (see table 7.63). This could indicate a need for cooperation between universities/training providers and employers in the sports sector.

Table 7.63: Work more closely with universities/training providers



ESSA-SPORT

Improving the Supply of Skills to the Sector

8

REPORT ON NATIONAL CONSULTATIONS

8. REPORT ON NATIONAL CONSULTATIONS

Presentation of the activities of consultation carried out in your country, the main items discussed, and overall feedback received from national stakeholders.

The national consultation in Denmark was held on 18 June 2019 in Aarhus. The Danish Institute for Sports Studies hosted the three-hour event.

The invited stakeholders were representatives from different organisations, educational institutions, universities, municipal actors, sports clubs and consultants. More specified, there were representatives from: IFFD (Sport and Leisure Time Facilities Denmark), DIF (National Olympic Committee and Sports Confederation of Denmark), ESAA (Elite Sport Aarhus), SDU (University of Southern Denmark), Dansk Skoleidræt (organisation for P.E. in Public Schools), SIKO (cooperative of sports clubs in Odense), Kultur og Fritid, Vejle Kommune (Vejle Municipality, Department of Sport and Leisure), DBU Jylland (Danish Football Association, Jutland), Dansk Firmaidrætsforbund (Danish Company Sports Federation), University College Holstebro, the consultancy company IDKON, IUCE (Danish Center for Sport Development) and University College Lillebælt.

The day began with a presentation of the results and perspectives from the national report presented by the Danish Institute for Sports Studies. The participants were asked to comment and ask questions during the presentation. The general opinion was that the results were difficult to translate into real challenges. Moreover, the participants found some of the questions from the survey unclear, and e.g. the focus on professionalisation led to a bigger discussion about definitions. Does professionalism refer to increased skills or to the shift from voluntary to paid occupation and a commercialised sector? The participants agreed on the importance of acknowledging the fact that the sports sector has become an actual sector in Denmark and that both voluntary organisations, commercial actors and public institutions all will define the sector in the future. From some of the representatives from the voluntary sector, however, it was important to stress that focus on professionalism should happen without a domination of commercialisation. There were no overall good solutions or conclusions on the dilemma between the values of voluntary work on one side and the demand for increased skills in many facets on the other side. One concern that was raised was whether the shift towards higher skills and professionalised offers in the sports sector in general will threaten the voluntary sector in Denmark. Some voices believed that professional (paid) staff in the voluntary organisations can actually help increase the number of volunteers in the organisations.

Another example of unclear definitions in the national data is how the survey counts the self-employed – is it counted by VAT-numbers or in fulltime careers? The participants came to an agreement that many of the questions were formulated in such broad terms, that it was difficult to be specific about concluding remarks.

After the presentation and discussion of the data, the moderator from the Danish Institute for Sports Studies started new rounds of discussion and predictions for the future. The points and predictions can be sorted into three main pillars, as follows:

a) Challenges and tendencies in the sports sector related to education, jobs, and competencies.

The stakeholders agreed that due to the strong tradition of voluntarism in Denmark, professionalization in sport is a touchy subject, and there are many assumptions and traditions in the sports sector, which can be difficult to change. Furthermore, there are demographic and regional differences in the character and importance of voluntary work.

At the same time, it seems as if the sporting sector is being disrupted. Earlier, sport was a leisure time activity that took place in sports clubs after 4 p.m. However, today sport is an inherent part of everyday life, carried out by private actors, clubs, organisations, politicians and volunteers.

The possibility of doing sport in many different arenas gives the population the opportunity to cherry-pick between different providers. With the increasing number of providers of sport, clubs and federations should discuss how they can keep or raise their quality, to maintain the entire spectre of participants.

The federations organise most of the trainer-programmes, and as coaches gain more experience, they can advance in the system. Coaches at the lowest level typically trains children, which results in a constant inflow of unskilled trainers/parents. This is an important challenge if the goal is to give the children quality training. Generally, there is little focus on the so-called “child competences” in clubs, although they are the future members and volunteers.

Traditionally, the volunteers and the clubhouse have been the main actors and the centre for sport in a local community. However, there is a growing tendency to gather clubhouses and facilities into larger complexes where there is place for paid staff, volunteers, members, self-organised sports as well as commercialised sports. Many different groups can use the facilities as a place to meet and connect, which opens for partnerships between the private-, public-, and civil sector.

b) The jobs related to sport and the skills needed in the future.

Increased professionalisation is key to grow employment in the sports sector. Yet, there are no clear structures in relation to career paths and budgets are generally tight. Many facilities have managers with a craftsman background, even though their tasks are primarily managerial. Yet there is little education and training dedicated to the management of facilities in Denmark.

c) The sports related educations and the skills acquired to the future.

The sports related educations in Denmark often have a very specific or narrow focus on one area or subject. Yet, the sector more general competences like organisational, coaching, mercantile and management skills and knowledge of how to organise volunteers.

In the sports sector, employers are hiring people based on their attitude, personality and experience, more than their formal competencies. The question whether this is because the formal competencies do not match demand? No matter what, it is important that the educational institutions keep a close eye on the sports sector and its development to be able to fulfil their role as research and educational institution so they can match their candidates with jobs within the sector.

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9 NATIONAL CONCLUSIONS

9. NATIONAL CONCLUSIONS

Presentation of key findings and conclusions for your country from the entire ESSA-Sport project

The first main conclusion from the Danish national report is that voluntarism still plays a crucial role within the sector for sport and physical activity. More than 500,000 people are volunteering in non-profit sports clubs and out of these, approximately 292,000 are volunteering on a regular basis. In addition, almost 50% of the respondents would best describe their organisation as not-for-profit and nearly two-thirds of the respondents in the survey answer that they regularly engage volunteers/unpaid staff in their organisation. The non-profit organisations will most likely keep playing an important role in the future. However, within some occupations there is a need to upgrade the skills of employees.

Secondly, the sport and physical activity sector in Denmark, it is still a relatively small economic sector, it occupied 23,533 individuals in 2015 (according to Statistics Denmark). Sports clubs make up the largest subsector accounting for nearly half (47%) of the total employment. Moreover, the sector is characterised by organisations that in a typical year have an average of 0-4 employees. Thus, a majority of the organisations and companies based in the sector are small with few are medium-sized or major organisations. In addition, the sector is dominated by part-time occupations, who made up 58% of all contracts in 2015. Although the sector has developed from 2011 to 2015 in relation to employment the number of self-employed has basically remained the same. Furthermore, both genders are well represented in the sector. The subsectors – sports facilities and sports clubs – have a small overrepresentation of men, while there is a small overweight of women in subsectors such as fitness facilities and in other sports activities.

Thirdly, the general education level in the sports sector is relatively low and there are fairly few employees with a higher education, and therefore also few with a formal education targeted towards the sport and physical activity sector. Most respondents taking part in the survey believes that demand for a better qualified workforce operating in the sport sector will increase in the future with professionalisation of the sector. However, many of the organisations participating in the study still state that work experience, attitude, and personality is more important than formal skills and qualifications when recruiting paid staff. Thus, there might be a need for organisations within the sector to embrace a workforce with right qualifications and skills to a higher degree. Finally, the survey also shows that there is a need for senior and middle management staff to improve within the areas of leading change and facilitating innovation.

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10 NATIONAL ACTION PLAN AND RECOMMENDATIONS

10. NATIONAL ACTION PLAN AND RECOMMENDATIONS

Recommendation	Priority Action	Actors	Timeline	Measure of success	Comment
Ministry of Culture ensures independent and impartial monitoring on the short-term and long-term development within the sport sector in relation to labour market and education	Monitor the development	Ministry of Culture, Danish Institute for Sports Studies	Annually	The establishment of an annual independent and impartial monitoring	
	Analyse the development	Ministry of Culture, Danish Institute for Sports Studies	Annually	Annual analysis from an independent and impartial actor	
	Convey the development	Ministry of Culture, Danish Institute for Sports Studies	Annually	Annual convey on the development from an independent an impartial actor	
Ministry of Culture should in partnership with relevant actors create a network group in order to comment on and discuss the development within the sport sector	Facilitate a seminar	Danish Institute for Sports Studies	Every third year	Definition of further common recommendations and action plan to ensure continued common direction	
	Network with concerned actors	Ministry of Culture, Danish Institute for Sports Studies, umbrella organisations, clubs, universities offering sport education, other relevant actors	Ongoing	Network meeting every third year with relevant actors	
	Exchange of data	Ministry of Culture, Danish Institute for Sports Studies, sport umbrella organisations, and universities and colleges offering sport related education and other relevant actors	Ongoing	By 2021 relevant actors exchange data in an established way in order to discuss, monitor and analyse the sector	
Increased focus on pedagogical skills and teaching motor skills among child-related staff					
	Inspire institutions, schools and voluntary clubs to focus on child-related skills with special emphasis on motivating children for more movement when hiring staff	Daycare, public schools and leisure time clubs	Annually	In 2022 all day care and public schools should have a policy on special skills concerning motor skills and motivation when hiring new staff	
	Political pressure on public schools	Politicians with responsibility of public schools.	Ongoing	All public schools declare ownership to raise the level in	

	in order to raise the level of the implementation of the Danish school reform from 2014 that requires at least 45 min. of physical activity per day			order to meet the target	
	Monitor the level of physical activity during school hours	Independent analysis	Annually	Financial support to ensure annual survey among school children and head masters of public schools.	
Sport umbrella organisations optimise their educational courses in order to meet the skills and attributes requested on the labour market	Adaption of educational offers	Umbrella sport organisations and sport federations	2021	More volunteers get training and education in order to meet (new) requirements and requests on the labour market	
Creation of a cooperation across universities and colleges offering sport education in order to benefit from each other's knowledge and expertise	The exchange of knowledge and expertise	Universities and colleges offering sport education	By 2022 there a higher degree of cooperation in relation to education and knowledge transfer between universities and colleges offering sport education	Increased cooperation between universities and colleges	

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ANNEXES

ANNEXES

a) Appendix 1

Table 1: Total number of persons working in the sector by gender (93.1 & 85.51)

NACE CODES	TOTAL NUMBER OF PERSONS WORKING IN THE SECTOR PER GENDER											
	2011		2012		2013		2014		2015		2016	
	Female	*Male*	*Female*	*Male*	*Female*	*Male*	*Female*	*Male*	*Female*	*Male*	*Female*	*Male*
93.1 Sports activities	9.984	11.678							10.774	12.779		
93.11 Operation of sports facilities	3.306	4.130							3.459	4.102		
93.12 Activities of sport clubs	3.935	5.498							4.446	6.528		
93.13 Fitness facilities	1.975	1.422							2.067	1.434		
93.19 Other sports activities	768	628							802	715		
85.51 Sports and recreation education	669	479							928	671		
Please indicate the source	Statistics Denmark											

Table 2: Total number of persons working in the sector by type of contract (93.1 & 85.51)

NACE CODES			TOTAL NUMBER OF PERSONS WORKING IN THE SECTOR PER TYPE OF CONTRACT												
	2011			2012		2013		2014		2015			2016		
	Full-time	*Part-time*	*Self-employed*	*Full-time*	*Part-time*	*Full-time*	*Part-time*	*Full-time*	*Part-time*	*Full-time*	*Part-time*	*Self-employed*	*Full-time*	*Part-time*
93.1 Sports activities	8.650	12.490	522							9.277	13.727	549		
93.11 Operation of sports facilities	3.727	3.673	36							3.668	3.855	38		
93.12 Activities of sport clubs	3.699	5.711	23							4.289	6.671	14		
93.13 Fitness facilities	753	2.580	64							792	2.649	60		
93.19 Other sports activities	471	526	399							528	552	437		
85.51 Sports and recreation education	323	387	438							393	523	683		
Please indicate the source			Statistics Denmark											

Table 3: Total number of persons working in the sector by category of age (93.1 & 85.51)

NACE CODES	TOTAL NUMBER OF PERSONS WORKING IN THE SECTOR PER CATEGORY OF AGE																	
	2011			2012			2013			2014			2015			2016		
	< 25	*26-49*	*50+*	*< 25*	*26-49*	*50+*	*< 25*	*26-49*	*50+*	*< 25*	*26-49*	*50+*	*< 25*	*26-49*	*50+*	*< 25*	*26-49*	*50+*
93.1 Sports activities	10.040	7.675	3.947										11.016	7.852	4.685			
93.11 Operation of sports facilities	2.809	2.576	2.051										2.910	2.334	2.317			
93.12 Activities of sport clubs	4.884	3.048	1.501										5.727	3.458	1.789			
93.13 Fitness facilities	1.857	1.389	151										1.853	1.395	253			
93.19 Other sports activities	490	662	244										526	665	326			
85.51 Sports and recreation education	380	554	214										489	834	276			
Please indicate the source	Statistics Denmark																	

Table 4: Total number of persons working in the sector by level of education (93.1 & 85.51) – ISCED Levels26

NACE CODES		TOTAL NUMBER OF PERSONS WORKING IN THE SECTOR PER LEVEL OF EDUCATION															
		2011								2012							
	Level 1	*Level 2*	*Level 3*	*Level 4*	*Level 5*	*Level 6*	*Level 7*	*Level 8*	*Other /no info*	*Level 1*	*Level 2*	*Level 3*	*Level 4*	*Level 5*	*Level 6*	*Level 7*	*Level 8*
93.1 Sports activities	661	8.788	8.450		619	1.659	562	12	911								
93.11 Operation of sports facilities	146	3.193	3.288		178	381	68	2	180								
93.12 Activities of sport clubs	413	3.858	3.208		280	783	353	8	530								
93.13 Fitness facilities	45	1.244	1.462		113	344	82	1	106								
93.19 Other sports activities	57	493	492		48	151	59	1	95								
85.51 Sports & recreation education	19	397	432		32	147	48	0	73								
Please indicate the source		Statistics Denmark Other/no info is the residual. For instance, 7.436 are working in "93.11 Operation of Sports Facilities", however, the Statistics Denmark lack information on 180 individuals. Hence, "Other/no info" is the number of individuals working in the sector (for instance 93.11) minus the sum of level 1, 2, 3, 5, 6, 7, 8. For 93.11 the sum equals 7.256 → 7.436-7.256 = 180 individuals for which there exist no info. Note: Level 4 is not used in Denmark (source: Statistics Denmark ()). In the Nace Rev 2.														

[26] ISCED Levels: level 1 – Primary education, level 2 – Lower secondary education, level 3 – Upper secondary education, level 4 – Post-secondary non-tertiary education, level 5 – Short-cycle tertiary education, level 6 – Bachelor's or equivalent level, level 7 – Master's or equivalent level, level 8 – Doctoral or equivalent level

NACE CODES			TOTAL NUMBER OF PERSONS WORKING IN THE SECTOR PER LEVEL OF EDUCATION													
	2015									2016						
	Level 1	*Level 2*	*Level 3*	*Level 4*	*Level 5*	*Level 6*	*Level 7*	*Level 8*	*Other/ no info*	*Level 1*	*Level 2*	*Level 3*	*Level 4*	*Level 5*	*Level 6*	*Level 7*	*Level 8*
93.1 Sports activities	707	8.766	9.373		707	1.965	791	13	1.231								
93.11 Operation of sports facilities	185	3.081	3.404		197	398	82	-	214								
93.12 Activities of sport clubs	453	4.130	3.706		324	1.034	551	10	766								
93.13 Fitness facilities	24	1.051	1.680		128	387	76	1	154								
93.19 Other sports activities	45	504	583		58	146	82	2	97								
85.51 Sports & recreation education	26	423	626		59	258	93	2	112								
Please indicate the source			Statistics Denmark														

Table 5: Total number of persons working in the sector per ISCO codes

ISCO GROUPS / NACE CODES	TOTAL NUMBER OF PERSONS WORKING IN THE SECTOR PER ISCO CODES											
	2011							2012				
	Other sectors	*1- Managers*	*2 - Professionals*	*3 - Technicians*	*4 - Clerical Support workers*	*9 - Elementary Occupations*	*No codes*	*1- Managers*	*2 - Professionals*	*3 - Technicians*	*4 - Clerical Support workers*	*9 - Elementary Occupations*
93.1 Sports activities	5.497	473	1.201	4.660	1.701	8.687	522					
93.11 Operation of sports facilities	3.436	131	213	274	395	2.951	36					
93.12 Activities of sport clubs	1.525	255	743	1.833	894	4.160	23					
93.13 Fitness facilities	373	58	164	1.352	324	1.062	64					
93.19 Other sports activities	163	29	81	1.201	88	514	399					
85.51 Sports and recreation education	124	10	89	80	36	371	438					
Sources			Appendix 1, table 8b (source: Statistics Denmark (NSO)) "No codes" is the residual. For instance, 7.436 are working in "93.11 Operation of Sports Facilities", however, Statistics Denmark lack information on 36 individuals – these are the "no codes". Hence, "no codes" is the number of individuals working in the sector (for instance 93.11) minus the sum of 1, 2, 3, 4, 9 and "other sectors". For 93.11 the sum equals 7.400 → 7.436-7.400 = 36 individuals for which there exist no codes.										

ISCO GROUPS NACE CODES			TOTAL NUMBER OF PERSONS WORKING IN THE SECTOR PER ISCO CODES										
			2015					2016					
	Other sectors	*1- Managers*	*2 - Professionals*	*3 - Technicians*	*4 - Clerical Support workers*	*9 - Elementary Occupations*	*No codes*	*1- Managers*	*2 - Professionals*	*3 - Technicians*	*4 - Clerical Support workers*	*9 - Elementary Occupations*
93.1 Sports activities	5.947	659	1.450	4.381	2.000	2.896	6.220					
93.11 Operation of sports facilities	3.525	149	194	249	368	1.590	1.486					
93.12 Activities of sport clubs	1.845	321	1.049	2.442	1.093	771	3.453					
93.13 Fitness facilities	353	160	122	1.586	441	428	411					
93.19 Other sports activities	224	29	85	104	98	107	870					
85.51 Sports and recreation education	169	10	146	70	46	91	1.067					
Sources			Statistics Denmark No codes: See the explanation above (2011)									

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