



Sport-related Industry in the EU

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Sport & the EU

- *Promoting* sport as a vehicle for social change
 - Health-enhancing physical activity
 - Social Inclusion (disability, immigration, youth)
 - Informal learning
- *Protecting* sport
 - Tackling match-fixing, doping, violence
 - Good Governance & legal stability
 - Industry & the economic dimension



Developing the Evidence Base

2007 White Paper on Sport:

"The launch of policy actions and enhanced cooperation on sport at EU level needs to be underpinned by a sound knowledge base. The quality and comparability of data need to be improved to allow for better strategic planning and policy-making in the area of sport."



Policy Backdrop 1/2

EU Work Plan for Sport 2011-2014

- Economic aspects of sport, in particular evidence-based policy making, are a priority
- Expert Group on Statistics (XG STAT): mandated to recommend ways to promote data collection to measure the economic benefits of the EU sport sector (Sport Satellite Accounts - SSAs)

Council Conclusions

- Council Conclusions (Nov 2012) on strengthening the evidence-base for sport policy making
- Council Conclusions (Nov 2013) on the contribution of sport to the EU economy, and in particular to addressing youth unemployment and social inclusion
- Council Conclusions (Nov 2014) on sport as a driver of innovation and economic growth



Policy Backdrop 2/2

EU Work Plan for Sport 2014-2017

- The economic dimension of sport, including the economic benefits of sport and innovation, is a priority
- Expert Group on the Economic Dimension of Sport (XG ECO) mandated to focus, inter alia, on economic benefits of sport and innovation
- Recommendations to measure the economic benefits of sport in the EU based on the ongoing work to promote the set-up of SSAs in the MS (Jan 2016)



2012 Study on the Contribution of Sport to Economic Growth & Employment in the EU

- Study undertaken by a consortium led by Sports Econ Austria (SpEA), commissioned by the European Commission
- Worked mainly through *Sport Satellite Accounts*, which is an accounting methodology that filters National Accounts for sport-relevant activity to extract sport-related figures.
- The aim was *to provide high-quality macro-economic statistics about the sport economy*.

Definitions

Vilnius Definition of Sport, broken down into:

- Statistical Definition – purely sporting activities
 - e.g. Stadia, swimming pools and the activities of professional sport clubs
- Narrow Definition – includes all goods & services *necessary to do sport*
 - e.g. Footwear, clothing, fitness centres, sailing equipment, horses, dancing schools, watches, weapons (!)
- Broad Definition – includes all activities that *require sport as an input*
 - e.g. TV broadcasts, dietary supplements, hotels, restaurants, health services, veterinary services

Outcomes 1/2

- Share of sport-related GVA of total EU GVA is 1.13% for the narrow definition and 1.76% for the broad definition, or 174bn EUR (2005 figures)
- The direct effects of sport, combined with its multiplier effects (indirect & induced) added up to 2.98% (294bn EUR) of overall GVA in the EU.
- GVA per capita is higher in higher income MS, ranging from 5-10 EUR to 50-100 EUR per capita.
- Sectors of particular importance for sport
 - Tourism (e.g. Austria)
 - Fitness & Media (e.g. UK)
 - Education (e.g. Denmark, Baltics states)

European Union - GVA at market prices, broad definition

European Union

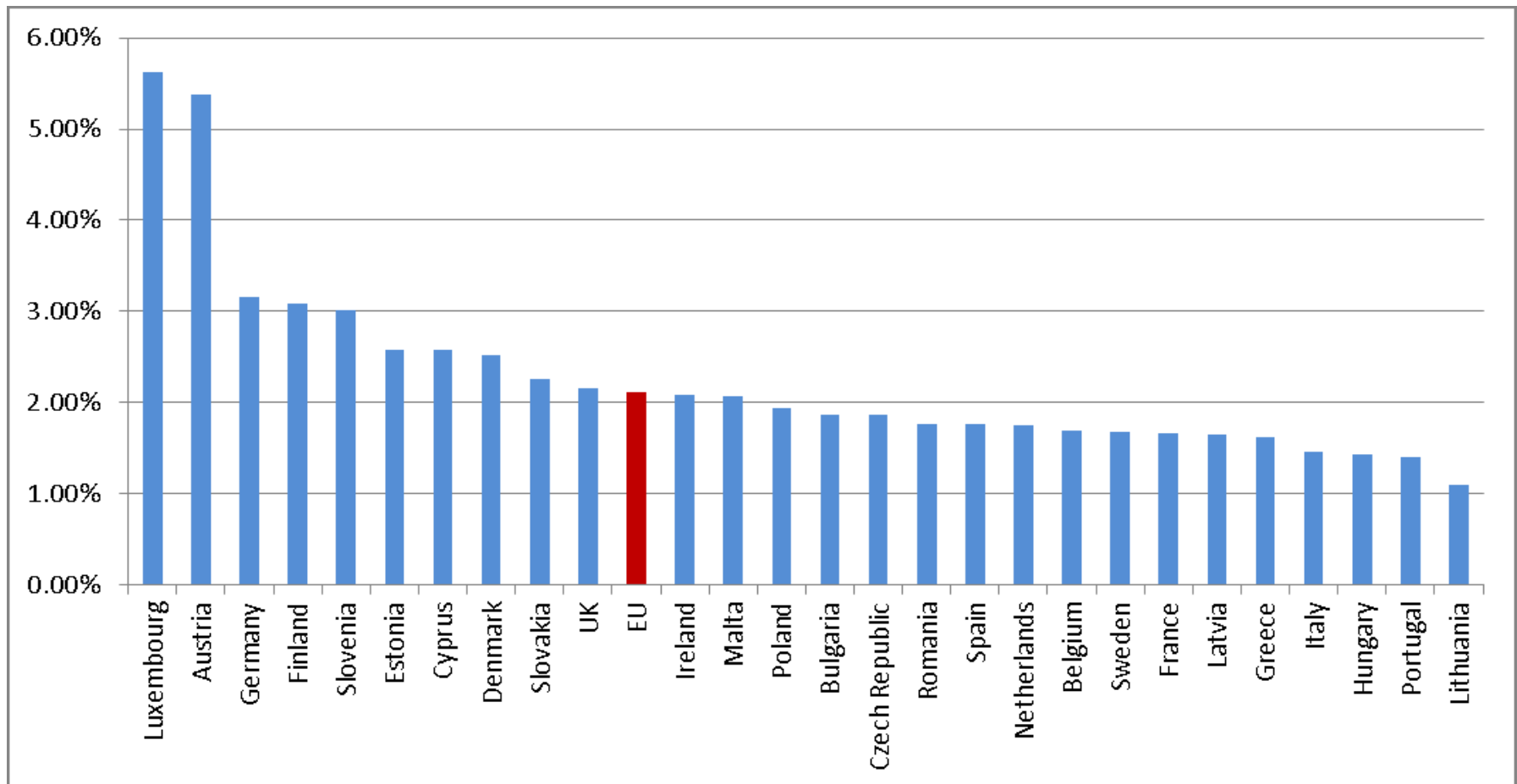


■ Gross value added (top ten sectors) in million €

Outcomes 2/2

- Contribution of sport-related employment to total employment is 2.12% considering the broad definition, or 4.5m employees, and 3.5% or 7.4m employees including indirect effects. [labour-intensive industry]
- High multiplier effects in areas like construction, tourism.
- National income elasticity of sport is 1.14.
- Every sixtieth Euro generated and earned in the European Union is sport-related.

Broad Definition: Share of national employment, in % of heads





Taking the process forward

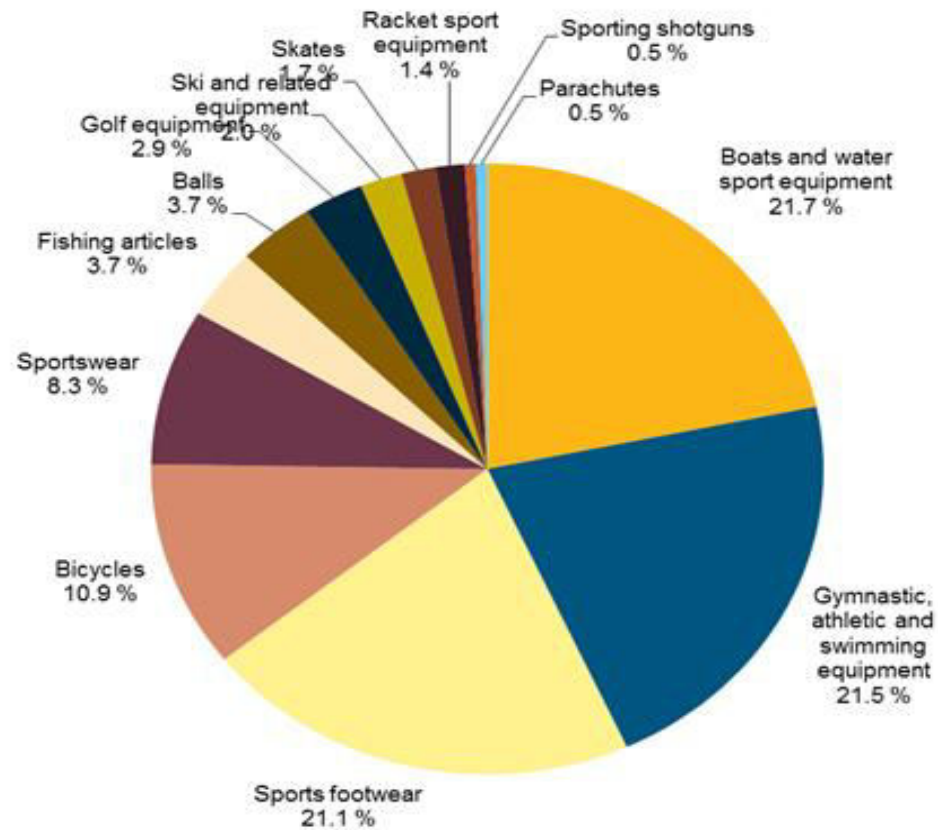
- Ongoing study on the contribution of sport to the employability of young people in the context of the Europe 2020 strategy (results mid-2017)
- Study on gaps in the implementation of SSAs across the EU and further support to national efforts in developing SSAs
- Policy work focussing on good governance, digital single market, financial fair play
- European Week of Sport, promoting physical activity and sport
- Health-enhancing Physical Activity Recommendation, Report end-2016 on public policy indicators



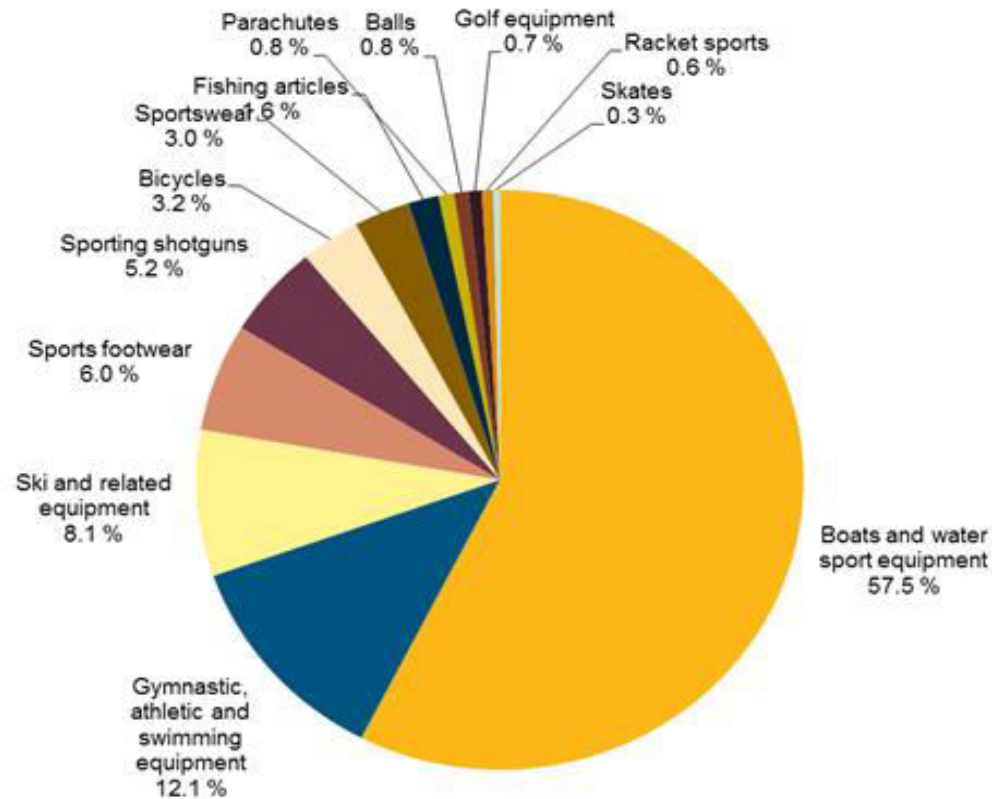
Taking the process forward

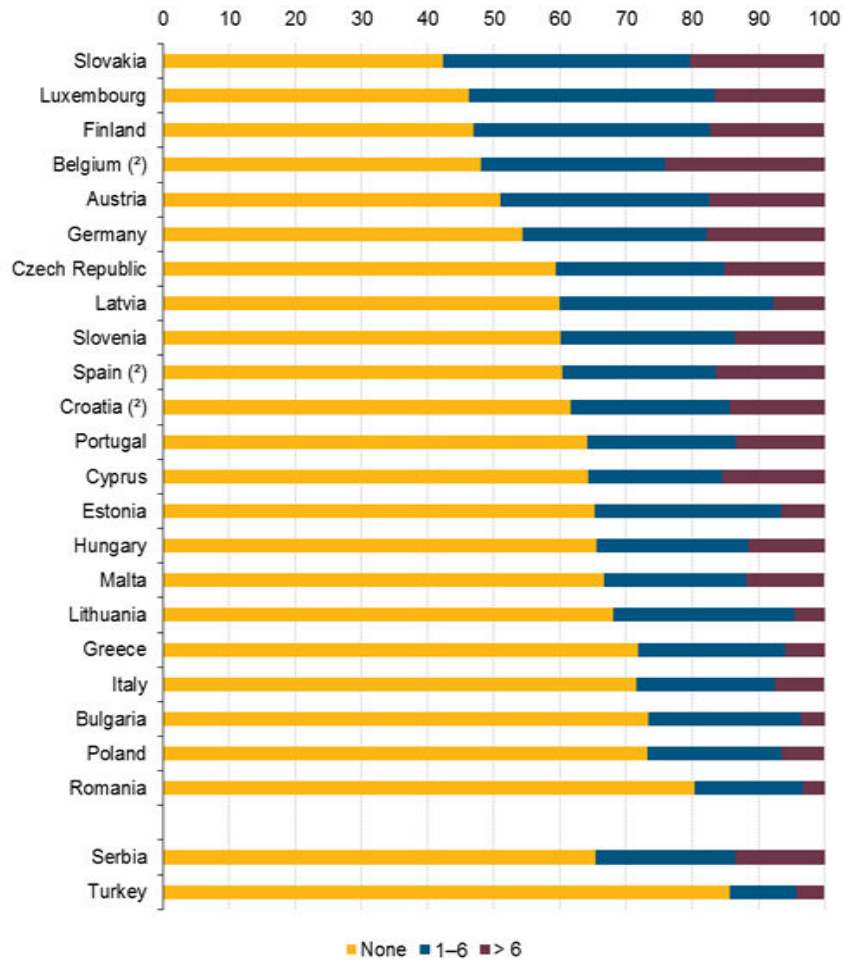
- Statistical work by Eurostat financed by the Directorate-General for Education & Culture for 4 years; 3 full-time experts working on sport & culture statistics
- Task Force set up by Eurostat, made up of Member-State representatives
- First outputs:
 - Employment in sport
 - International trade in sporting goods
 - Attendance at live sport events
 - Private expenditure on sporting goods & services

Share of extra-EU-28 imports of sporting goods (value in EUR), by product, EU-28, 2014

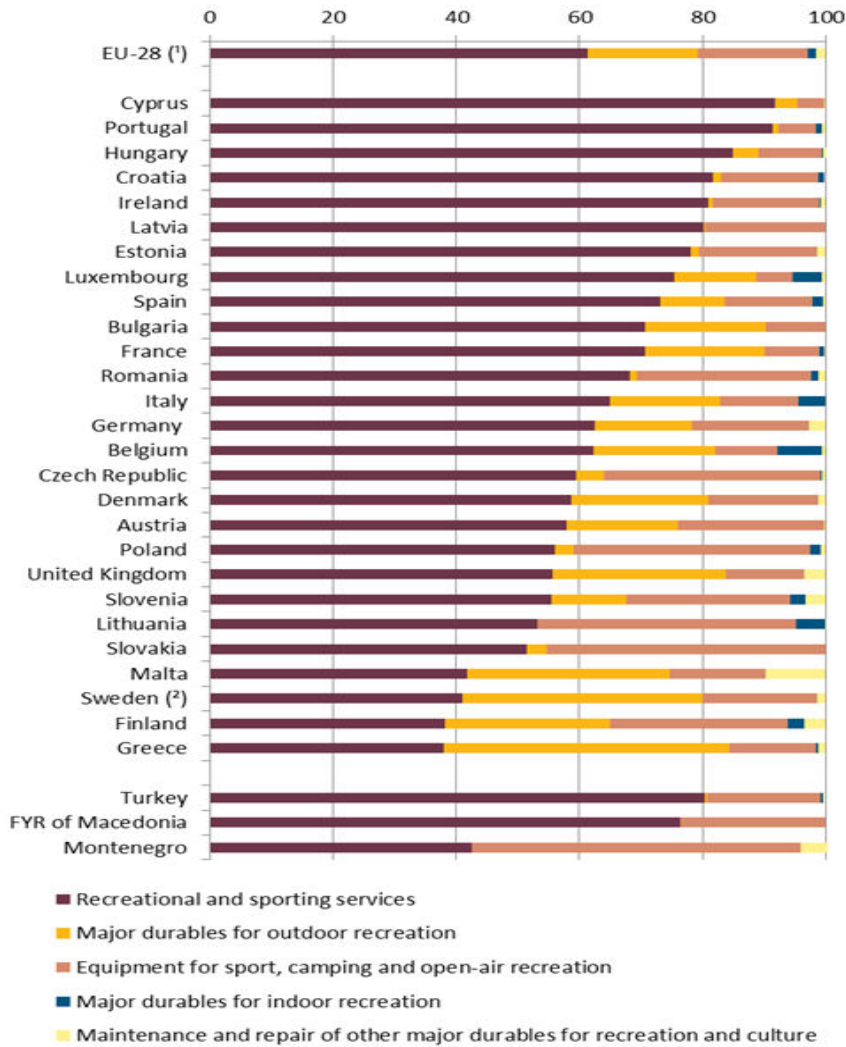


Share of extra-EU-28 exports of sporting goods (value in EUR), by product, EU-28, 2014





Persons aged 25 to 64 attending live sport events in the last 12 months, by frequency, 2011 (%)



Private household expenditure on sporting goods and services, by group of products, 2010 (%)

Challenges ahead

- Further rolling-out of SSAs across the EU: workshops, assistance
- Update 2012 Study (data set from 2005)
- Standardisation of work (collection, categorisation)
- Eurostat work in progress
- Costs of physical inactivity (ISCA study: 80bn EUR) & counterfeiting (OHIM: 500m EUR and 2800 jobs annually)
- Voluntary Work
- Policy Work: Promoting & Protecting Sport



Thank you

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