CIMSPA

CIMSPA 2023 Workforce Insights Report

Understanding the shape of the UK sport and physical activity workforce post-COVID-19, and its skills needs for the future

A report produced by Lightcast for CIMSPA.

Lightcast

September 2023

About CIMSPA

The Chartered Institute for the Management of Sport and Physical Activity

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

CIMSPA vision

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

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About Lightcast

Lightcast (formerly Emsi Burning Glass) **is the world's leading authority on jobs, skills, workforce talent, and labour market dynamics.**

With engineers and data specialists collecting and analysing data from thousands of job boards, company websites, online resumes, employee profiles, and traditional government sources, the company produces the most comprehensive and up-to-date picture of the labour market available. Organisations across the globe use Lightcast market research, analytical software, and data expertise to better understand their own workforce and identify skilled and diverse talent for future growth.

Headquartered in Boston, Massachusetts, and Moscow, Idaho, Lightcast is active in more than 30 countries and has offices in the United Kingdom, Italy, New Zealand, and India.

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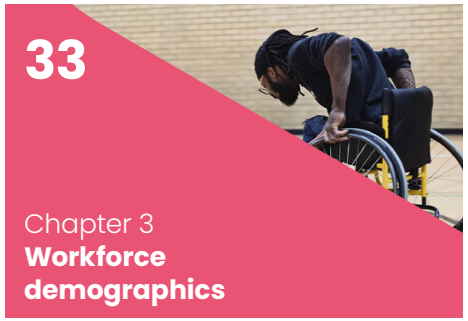
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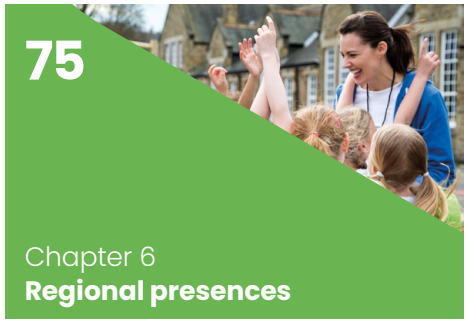
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Foreword from CIMSPA

Tara Dillon,
CIMSPA CEO

It has been three years since we published our last workforce insight report and, in that time, the sport and physical activity profession, and indeed the world, has experienced a relentless series of challenges. Despite this turbulent period, our resilient workforce has negotiated the immense pressures placed on it, and, as you will see from this new report, has been agile and has continued to progress positively.

As the sector recovered from the pandemic and has faced the challenge of the cost-of-living crisis, I am proud that CIMSPA has supported the profession by utilising £7 million worth of investment to provide vital retraining, re-skilling and redeploying of the workforce, helping retain many of the brilliant people that are committed to working in our sector.

This report not only provides an accurate and comprehensive update on workforce changes and trends over the last three years but an even richer set of insights in relation to how diverse and representative our workforce is and where people work, whether that be for an employer or in their own business.

The insights that we share in this report are based on new datasets which allow us to analyse the picture right across our sector, beyond the standard industry classification categorisations that have historically limited what we, and policy makers, understand about the scale and impact of our sector.

The sector is in a positive place, but this report does highlight the very real and significant challenges that we face. Many of these are not new. Changes in both customer and workforce perceptions and expectations along with the economic challenges and advances in technology, have amplified the level of the challenges we face around recruitment and retention. There continues to be uncertainty over career pathways and progression opportunities, we struggle to keep hold of people beyond their mid-thirties and there is much work to do to make our sector more attractive to a diverse workforce.

This report uncovers the intricate nature of our sector and workforce, the clear strengths we have, as well as areas for development It provides the foundations for us to build from.

At CIMSPA, we continue to be committed to supporting the sector to address these challenges. The last three years have shown just how well the workforce can not only adapt but also unite. The insights from this report have enabled us to develop a new strategy which we will be using to deliver real impact for people working in the sector, those considering joining our profession, as well as employers, education providers and our system partners.

We truly believe that by unlocking the power of our profession, the sport and physical activity workforce can make a massive impact on the health, wellbeing and economic prosperity of our nations.

Finally, this report would not have been possible without the significant contribution provided from Sport England, CIMSPA members and partners and we'd like to pay a great deal of thanks to all who've supported in the development of this report and the insights contained.

Executive summary

The previous iteration of the Workforce Insights Report (2020) was set against a much different backdrop than that which exists today. Between the mid-2000's and 2019, the sector had grown strongly on the back of increasing demand for sport and physical activity (S&PA) services across society, accelerated by the presence of major sporting events and the increased professionalisation of the sector. However, the COVID-19 pandemic in March 2020 followed by numerous economic challenges, have exposed sector-wide vulnerabilities but also shown strengths and foundations to build upon.

For policymakers, prospective workers and other stakeholders alike, understanding these labour market dynamics post-COVID is essential. This includes educators developing qualifications and curricula to further professionalise the sector, those in charge of assessing the future skill needs of S&PA roles and delivering careers advice, and those directly working in S&PA roles.

This latest iteration of the Workforce Insights Report, produced by Lightcast for the Chartered Institute for the Management of Sport and Physical Activity (CIMSPA), aims to explore these changes and see how the S&PA workforce is faring post-COVID with direct comparisons to the pre-COVID situation. In doing so, this report not only emphasises the impact of the pandemic on the sector but also provides some clues as to how the S&PA workforce might continue to evolve in the future – and what steps policymakers might take to ensure it continues to flourish.

The key findings of the report are set out below:

Quantifying the sport and physical activity labour market post-COVID

Defined across relevant industries and occupations, **in 2022 the S&PA labour market accounted for 586,000 roles in the UK**. This figure sits alongside research which suggests there are over 3 million coaches (paid or volunteers) involved in the sector.[1]

According to the latest official statistics however, the **S&PA workforce has yet to recover fully to its pre-pandemic size**. While job numbers are approximately 3.1% below 2019 levels, it is important to note the crucial role of the government's Coronavirus Job Retention Scheme in preserving jobs in the sector that would otherwise have been lost owing to the disproportionate impact of the pandemic on the sector's ability to operate. This **net decline in overall jobs is in large part driven by lower job numbers in S&PA industries for non-specialist supporting roles** such as bar staff, receptionists, and waiters. Job numbers of specialist S&PA occupations such as sport coaches, and sport and leisure assistants have broadly returned to their pre-COVID levels, although some can now be found more frequently outside of S&PA industries than before the pandemic.

Sport and physical activity workforce demographics

The S&PA workforce is less diverse than the wider workforce. Typically, it is younger and more male than average, with 30% more 16- to 24-year-olds working in these occupations than the wider economy, especially in sport and leisure assistant roles. Over 56% of jobs are held by men, compared to 52% of the wider economy. However, compared to the previous Workforce Insights Report, this represents a more balanced ratio suggestive of changes in the sector. **The S&PA workforce is also less diverse in terms of cultural diversity**: more than 87% of S&PA occupation workers are of White British backgrounds compared to 79% in the UK wide labour market, although sports players are an exception to this.

1 2022 CoachingUK workforce survey (2023)

Similarly, **fewer workers within the S&PA workforce report having a disability** (13%), compared to the average of all occupations (16%). In terms of socio-economic status, the S&PA workforce has a **higher proportion of workers in lower socio-economic groups (LSEGs)** compared to the wider workforce, driven by higher shares of students and people working in semi-routine occupations (28% vs 23% workforce-wide).

Recruitment activity for the sport and physical activity workforce

Given their client-facing nature, the **recruitment activity for core S&PA occupations was particularly hard-hit by the COVID-19 pandemic**. Recruitment activity for these roles fell further than the average following the pandemic's initial onset in March 2020, and also took significantly longer to recover. Following the wide-scale reopening of the economy, **recruitment activity surged from mid-2021** across all S&PA occupations, as employers reopened for business.

While recruitment activity was very high in 2022, this appears to be linked to **labour market churn** post-COVID, rather than jobs growth. This is visible across a number of key metrics, from the rise in the ratio of postings per job in the industry, to the increased posting duration and recruitment activity intensity, highlighting **recruitment and retention challenges in the sector**. The UK's **tight labour market** overall post-COVID would appear to be driving these challenges with employers competing intensely to attract workers and fill their vacancies. Furthermore, while **median advertised salaries** for almost all S&PA occupations have grown closer to the average of all occupations since 2019, they remain lower making them less attractive than other roles, which, in turn, negatively affects the ability of the sector to attract and retain talent.

Skills of the sport and physical activity workforce

In terms of skills, each of the S&PA occupations are more skewed towards **transferable skills** – such as, customer service, communication, and professionalism – than the average, indicative of their largely people-oriented nature. However, what is also clear is that **different jobs need different skills**, with each S&PA occupation having its own unique composition in terms of skill requirements as specified by employers, reflecting the distinct roles and responsibilities present in each.

Examining skill trends over time reveals that while the number (diversity) of different skills sought by employers of S&PA occupations overall has grown relative to 2019, the **skills mix demanded for these roles has shifted towards more general skill (non-sport specific) areas** important to the sector. In the context of retention and recruitment challenges, this may be the result of S&PA employers seeking to expand their search for talent. However, this may also be reflective of increased awareness by employers of the importance of other transferable skills beyond specific sport-skills requirements.

The skills analysis of S&PA occupations also reveals a number of **career pathways** for the sector, by identifying closely aligned entry level occupations in the wider workforce as well as next step progression roles for those already in the workforce. These insights can help address ongoing recruitment and retention challenges and sustain the sector workforce in the long term.

Regional presence of sport and physical activity

Because they serve local needs, **S&PA jobs** do not need to cluster together, but rather **are broadly distributed** across the country and can be found where demand is. In absolute terms, S&PA job numbers are particularly high in London and the wider South East, in line with their population numbers. Furthermore, plotting job posting numbers (a measure of demand) against S&PA participation rates in different regions shows a positive relationship between the two, with a higher number of job postings being advertised in areas with higher participation rates, such as the South East and the South West.

CIMSPA recommendations

Based on a number of themes emerging from the report, CIMSPA and its partners have a number of recommendations that seek to further develop the sector, including:

- Build better **talent retention strategies**, with improved recognition, reward and development opportunities for all S&PA professionals. As the sector continues to professionalise, it's critical that the workforce receive parity in the recognition, reward, security and opportunities reflective of their high levels of skill, experience and value.
- Prioritise recruiting and supporting a **more diverse workforce**. For the sector to reach more people and broader audiences, a more diverse workforce reflective of the general population is essential. The shift towards greater demand of general skills is a positive sign that strides are being made, there is more work required to eradicate barriers to entering the workforce and making careers in the S&PA sector more accessible.
- **Develop talent transfer strategies to enable volunteers and those non-S&PA specialist roles to transition to be part of the professional workforce**, enabling volunteers and those in non specialist roles e.g. hospitality and catering professionals to transfer to the S&PA the professional workforce will save time and cost in recruitment and training. At a time whereby attracting and keeping talent is proving difficult, it's key to recognise the value and opportunity of the workforce that are not S&PA roles. The sector should recognise the transferable skills of the voluntary workforce and make it easier for them to transition to be part of the professional workforce.
- **Harness the power of community** locally and hyper locally to ensure local services, and skills meet local needs. The data shows us there is no single picture accurately reflecting the UK as a whole; more a series of nations, regions and places with unique needs, wants and opportunities. As CIMSPA continues to develop local skills hubs across the UK it calls upon all employers and educators to engage forming a unified foundation to best service the needs of all UK communities.
- Build clear, **career pathways** for S&PA professionals, from entry roles to professional opportunities. There is now greater focus on careers than ever before, the focus on recruiting, training, supporting and retaining exceptional talent within sport and physical activity is vital for the sector's potential to be unleashed. It's critical for the sector to get behind CIMSPA's professional recognition pathways acknowledging expertise, qualification and experience through professional status and crucially available for all sector roles including coaches, instructors, educators, managers and leaders.

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Chapter 1

Introduction

Introduction

Over recent years, the role played by the sport and physical activity (S&PA) sector has become increasingly important to the UK economy, not least owing to the growing recognition of its significance in sustaining both physical and mental wellbeing.

1.1 Report overview

In the decade prior to the COVID-19 pandemic, a combination of higher disposable incomes, an increased separation of work and physical activity, and a changing attitude to health, had all contributed to a growing demand for sport and physical activity services across UK society, and consequently for a dedicated S&PA workforce. It was primarily against this backdrop of an emergent sector that the previous iteration of CIMSPA's Workforce Insights Report (2020) was set.[2]

However, the sudden onset of the pandemic in March 2020, represented an unprecedented shock to the sector's activities, with many S&PA services closed or struggling to operate effectively until the final phased lifting of restrictions over a year later. While the 2020 report sought to assess and quantify the initial impact of the pandemic on the sector, it is only now that all public health restrictions have been lifted and the economy has fully reopened that the pandemic's true impact on the S&PA workforce has started to become clear.

As such, it is through this comparative lens that this Workforce Insights Report seeks to provide a comprehensive labour market intelligence review of the sport and physical activity workforce. In doing so, the report identifies any significant changes or challenges relative to the pre-pandemic situation, including ease of recruitment and talent retention. The report also reflects on how the growth of both freelancers and micro-businesses within the sector is changing the composition of the workforce and its implications for the sector. In addition to updating key findings from the previous 2020 report, this iteration also provides a more in-depth look at the diversity of the S&PA workforce and the skill compositions related to its core occupations.

For policymakers working in the sector, such as CIMSPA and Sport England, it is critical to have the best possible intelligence on the size and shape of the labour market, how and where it is changing most, and what challenges it is facing in the post-COVID environment. By better understanding these labour market dynamics, policymakers can improve their current suite of industry supports, ensuring its workforce is equipped with the right skills to deliver on the sector's broader ambition of building a healthier, flourishing society. In this regard, this report sits alongside other research initiatives aimed at gathering better intelligence on the sector, such as the Active Lives research recently published by Sports England.[3] In addition to that, the report presents an opportunity to combine quantitative insights with qualitative findings from the lived experience of workers who have been supported by sector initiatives. The Case Study overleaf provides an example of that, showcasing the impact that sector initiatives have had to retrain and retain workers during and after the pandemic.

2 CIMSPA Workforce Insight Report (CIMSPA, 2020)

3 Active Lives Research and Data (Sport England)

Case study

The key role of sector support for retention during the COVID-19 pandemic

The predominantly younger nature of the sport & physical activity workforce is closely linked to one of the biggest challenges for the sector: namely talent retention, and this challenge was further exacerbated by the COVID-19 pandemic.

During and post pandemic, CIMSPA has played a central role in supporting the sector retain talent. Through 'Retrain to Retain', 'ReEngage' and 'Stronger Together' CIMSPA has supported workers right across the S&PA workforce weather the impact of COVID-19. Alongside these initiatives, the Digital Marketing Hub has also been a key initiative in retraining and retaining workers in the sector.

Taking part in these initiatives has had a positive impact on the lives of participants, as showcase by the feedback they provided on these initiatives:

Digital Marketing Hub

"I'm a L3 Personal Trainer and Nutritionist PN1. I've watched lots of the webinars and this resource is absolutely invaluable. I am 52 years old and I qualified relatively late in life at the age of 49! I did 6months working in a gym, but then the COVID lockdown happened and I never went back. I had to ramp up my IT consultancy work online to make ends meet. Health and fitness is my passion and I've just started promoting myself online. Haven't got it all worked out yet by any means, I think finding your voice and niche takes time, trial and error. But my passion is to help people and make it easy for them to improve their health and just enjoy life! **Thank you for all you guys do at DMH.** ***Sarah***

DMH has an impressive Onboard Welcome & Intro to Services. I've attended several informative marketing webinars. **There's a wide range of UK sports coaches and health professionals in the Hub, great for sharing and connecting.** ***Rosalyn***

Wow, what an amazing resource. **It's jam packed full of useful posts, in-depth webinars on a massive range of topics and a whole wealth of knowledge.** Crucially the vibe is incredibly supportive, whether for first steps or encouraging the more capable in the community to stretch even further.
So pleased to be a member. ***Scott***"

ReTrain To ReTain

ReTrain funding came at the perfect time for me as I was lost when it came to employment and was probably going to end up working in the security or warehousing industry just to pay my bills even though helping people achieve their goals through health and fitness is my passion.

As a result of ReTrain course funding I was able to widen my range of services to include work with specialist populations in my area. I am hoping to use this knowledge to open my own business offering opportunities for people with low incomes to access exercise and nutrition coaching. I believe that education is a lifelong process and truly appreciate the opportunity that ReTrain to ReTain provided.

Joao: *A Personal Trainer using ReTrain funding to upskill and work with specialist populations in LSEG areas.*

I chose to complete the diploma in teaching Pilates course so that I can hopefully go back to work, and I'd love to support people with additional needs or work with elderly people. I applied for ReTrain funding as I haven't worked for 3 years and have a disability. **Without ReTrain funding, I wouldn't have been able to afford the course.**

Leah: *Unemployed and using ReTrain funding to move into the sector and secure a job teaching Pilates to under-represented groups.*

I like to specialise in working with groups and individuals who struggle to engage in physical activity due to various conditions. For instance, I currently work with people with learning difficulties and physical disabilities.

Attending the Level 4 Obesity and Diabetes **Retrain-funded course has given me the potential opportunity to work with the local NHS Trust** and to introduce physical activity to many who would not usually engage in such activities, giving me new ideas and options. I have a number of clients who have lost weight as a result of the improved training.

Andrew: *A Group Exercise Instructor using ReTrain funding to work with specialist populations.*

I started an educational fitness journey in 2018. Swimming was always going to be the final string to my qualification bow. Financing it myself would have meant delaying studies quite significantly and I couldn't get any experience, through volunteering, at my local pool. **Without Retrain funding, I simply would have given up.** I have already been offered an interview and informal chat at the centre I trained at. The plan is to gain experience and apply for my level 2 Swim teaching qualification in the spring.

Joanne: *A Fitness Instructor using ReTrain funding to start a new career in swim teaching.*

Structure of this report

Each chapter of the report answers a different research question related to the sport and physical activity workforce:

- **Chapter 2** quantifies the size of the S&PA workforce post pandemic in terms of job numbers and examines its various compositional characteristics;
- **Chapter 3** discusses the demographic characteristics of the S&PA workforce;
- **Chapter 4** considers recent employer recruitment activity for S&PA occupations, how they have been changed by the pandemic, and whether the sector is facing any other staffing challenges;
- **Chapter 5** focuses on the skills required within S&PA roles and how they are changing;
- **Chapter 6** provides insights on the regional distribution of the S&PA workforce;
- **Chapter 7** concludes and sets out CIMSPA's high-level policy recommendations based on the research.

1.2 Data sources

This report combined several different data sources from official statistics and Lightcast proprietary data on job postings. The main intelligence sources used to produce this report are described in detail in Annex 1 of this report. Among them are a variety of large-scale official surveys conducted regularly by the Office for National Statistics (ONS) combined with Lightcast empirical enrichment models that better integrate and enhance these different official datasets. These core labour market statistics are complemented by Lightcast's own proprietary job posting library which comprises over 80 million unique, detailed job advertisements collected in the UK since 2012.

1.3 Defining the sport and physical activity labour market

As a distinct labour market, S&PA has historically been somewhat challenging to accurately define and quantify given that it sits across several industries and activities, each requiring a diverse range of roles working together to provide quality services to the public. In an effort to overcome this challenge, the previous iteration of this report (2020) identified five industries and five occupations to define the professional workforce.

These occupations and industries are selected from the most granular level of the Standard Occupational Classification (SOC) and Standard Industrial Classification (SIC) taxonomies, respectively, and are set out in the table overleaf. For consistency with the previous iteration, the analysis conducted throughout this report makes use of these industry and occupation definitions to examine different aspects of the S&PA labour market.

S&PA workforce defining industries (SIC) and occupations (SOC)[4]

SIC4 industry	SOC4 occupation
Sports and recreation education	Leisure and sports managers
Operation of sports facilities	Sports players
Activities of sports clubs	Sports coaches, instructors, and officials
Fitness facilities	Fitness instructors (personal trainers)
Other sports activities	Sport and leisure assistants

S&PA workforce definition – Understanding the difference between industries (SIC) and occupations (SOC)

Industries and occupations represent two different but complementary lenses through which the Office for National Statistics (ONS) organises its statistics on economic activity, including employment.

Industries are defined by the primary economic activity of a workplace. In the S&PA, this would include a stadium or a fitness centre for example. These workplaces employ not only sports and physical activity professionals but also a range of other roles such as cleaners or marketing managers.

In comparison, **occupations are defined by the function of an individual worker's role**. For example, sports coaches are always working in a sport and physical activity role, even if they are working in a non-sports workplace, such as a university.

Industries are classified using the ONS *Standard Industrial Classification* (SIC) while occupations are classified under the ONS *Standard Occupational Classification* (SOC). Each of these classification taxonomies is structured hierarchically, with each subsequent level becoming more granular and specific. For this report, the most granular levels of these taxonomies are used (SIC4 and SOC4 respectively), thereby allowing for the most focused and sector specific analysis.

A further discussion on the important limitations of using standard industrial and employment classification taxonomies can be found in the annex of this report.

4 **Note:** A full description of each of the core S&PA industries and occupations is included in annex 1

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Chapter 2

Quantifying the sport and physical activity labour market

Key insights

- **An important source of employment:** As of 2022, the sport and physical activity (S&PA) workforce accounted for 586,000 jobs. This figure sits alongside research which suggests there are over 3 million coaches (paid or volunteers) involved in the sector.[5]
- **A multifaceted workforce:** Breaking down this workforce job figure in terms of S&PA industries and occupations shows that:
  - 29.4% were in S&PA occupations within the S&PA industry,
  - 18.0% were in S&PA occupations in other industries,
  - 40.4% were in non-S&PA occupations employed in S&PA industries,
  - 12.1% were in S&PA freelance roles.
- **Jobs preserved by government support during COVID:** The COVID-19 pandemic had a disproportionate impact on the S&PA workforce given its customer-facing nature as a sector, but the UK Government's *Coronavirus Job Retention Scheme* and sectors' interventions protected a significant number of jobs that would have likely been lost otherwise.
- **Workforce yet to fully recover to pre-pandemic levels driven by service sector job losses:** Despite government and sector specific support, the number of jobs in the S&PA workforce has yet to recover to its 2019 pre-pandemic level, down 3.1% according to latest statistics. This overall decline has been driven in the main by a fall in job numbers in S&PA industries particularly for non-specialist supporting jobs, particularly service sector roles such as bar staff, receptionists, and waiters.
- **Composition of S&PA professionals has changed, and a reduction in freelancers:** In comparison, the overall number of employed jobs for each core S&PA professionals has largely returned to their pre-pandemic levels, although somewhat fewer sport and leisure assistants/managers are employed in S&PA industries than was the case pre-COVID. The estimated number of S&PA freelancers – particularly fitness instructors – also declined sharply in 2022, contributing to the lower numbers overall.
- **Job flexibility a common characteristic:** An attractive feature of the sector is the flexibility it can provide workers, with many roles being part-time. While part-time work arrangements can be particularly attractive to those seeking flexibility, such as students, the associated lower earnings may make it more difficult to retain these workers over time – particularly in the face of other, better paid or full-time, employment opportunities elsewhere.

5 2022 CoachingUK workforce survey (2023)

The sport and physical activity (S&PA) workforce has undergone a significant evolution in the last couple of decades, but particularly so in recent years owing to the unprecedented impact of the COVID-19 pandemic.

By using the industry and occupational definition of S&PA outlined in Chapter 1, in conjunction with the latest official labour market statistics, this chapter looks at quantifying the number of jobs in the S&PA workforce today and how this has changed since the pandemic. The analysis looks at the S&PA workforce overall and its various components – both in terms of industries and occupations.

The findings from this section provide a clear picture of the evolution of the S&PA workforce over time and in particular of the legacy of the pandemic on the sector. Understanding which parts of the S&PA workforce are yet to return to pre-pandemic levels will help policymakers focus on the parts of the sector currently facing the biggest challenges and design workforce strategies aimed at retaining and attracting diverse talent to the sector.

2.1 Overview of the S&PA labour market and how it has changed over time

Looking first from an industry perspective, **S&PA industries accounted for over 409,000 jobs** in the UK, as of 2022. The overall number of these industry jobs is in large part attributable to two specific industries; the operation of sports facilities as well as the activities of sport clubs, each of which employs almost 150,000 staff.

From an occupational perspective, there are almost **278,000 S&PA professionals employed** in the workforce, as of 2022. The occupational composition of these jobs is more evenly split than industries, although sport coaches, instructors and officials account for the largest share.

Industry and occupation jobs are, however, neither strictly separate nor subsidiary quantities. There is clear interaction between them with different S&PA industries tending to employ a range of different occupations, both sector specific (such as fitness instructors) as well as non-specialist workers (such as receptionists). Similarly, other non-S&PA industries (education, for example) may employ S&PA professionals. For that reason, S&PA occupations need to be understood as an overlapping concept with S&PA industries, with their roles being both within S&PA industries and outside them.

Digging deeper to get a sense of this overlap between S&PA occupation and industry jobs[6] shows that approximately **172,200 (or 62%) of employed S&PA occupation roles are within S&PA industries**, with the remaining **105,600 (or 38%) S&PA roles being employed elsewhere**, such as in hospitality or education industries. The analysis also provides an estimate of the number of other **non-specialist supporting jobs working in S&PA industries, approximately 236,900 (or 58% of all S&PA industry jobs)**.

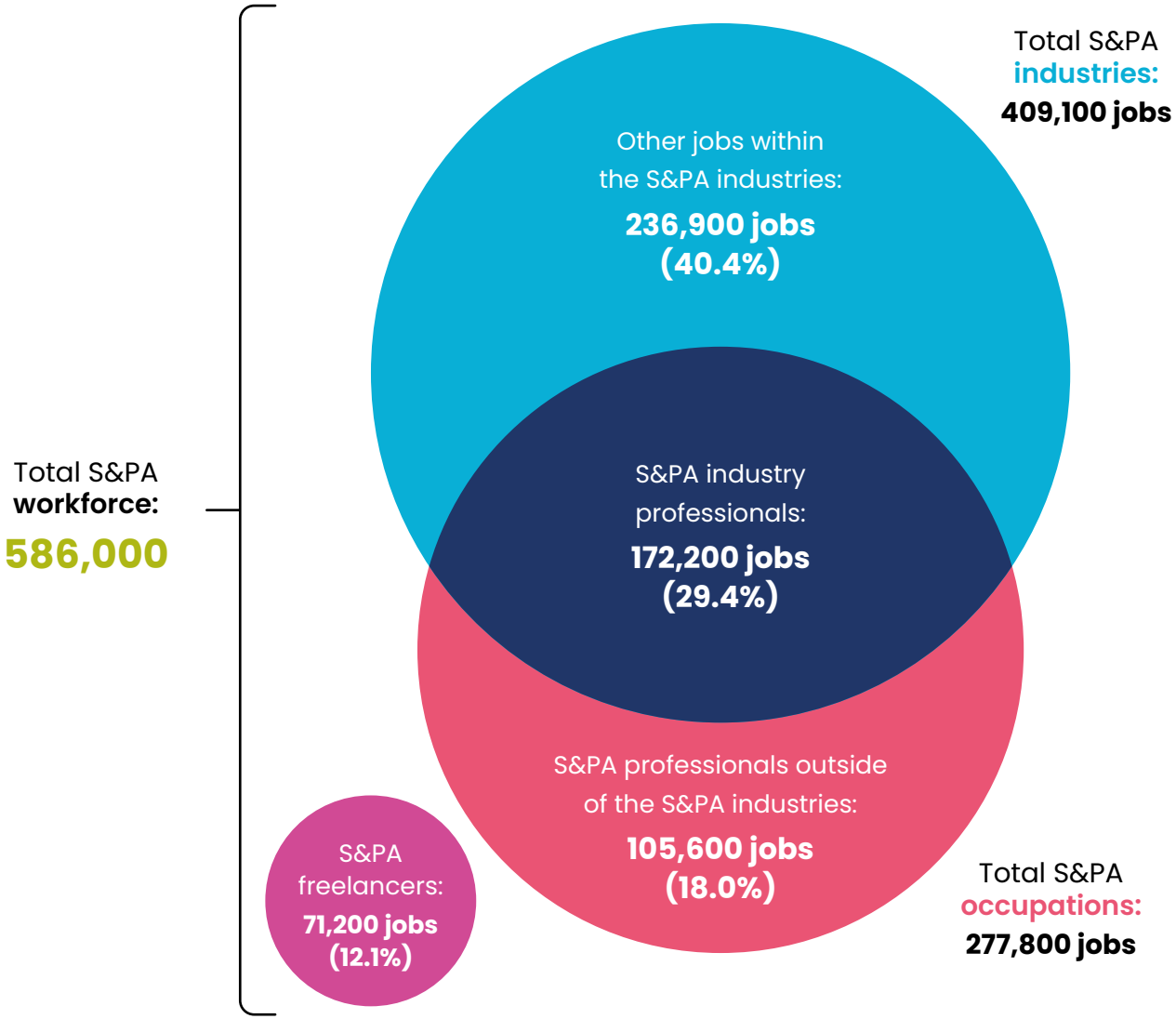
Finally, the analysis takes account of those within the same S&PA occupations who do not have a job at a recognised workplaces —individuals who are **freelance** or **self-employed** (own-account workers with no employees). This is an important feature of the S&PA labour market, which is estimated to account for a further **71,200 jobs**. [7]

In sum, putting all these cohorts together gives a **total S&PA workforce size of approximately 586,000 jobs**, as of 2022.

6 **Note:** This analysis is done using Lightcast's proprietary *staffing pattern matrix model*

7 **Note:** Freelancers include self-employed individuals who are not recorded as paying PAYE/VAT. Figures derived by Lightcast using 2022 ONS BRES and APS datasets. Further notes on calculation methodology set out in Annex 1

The sports and physical activity workforce
UK | 2022 | Jobs



Source: Lightcast (2023.1) and ONS APS

The broader coaching workforce – voluntary workers critical to S&PA

In trying to quantify the full extent of the sport and physical activity workforce, a major limitation of the standard occupational and industrial taxonomy classifications is that they typically capture only paid contractual employment roles.

This is particularly acute in the case of S&PA, where, because of its history and its place in society, a large amount of S&PA work, such as sports coaching, is undertaken in either a voluntary or hobby capacity, and therefore has less of tangible economic presence. As such, traditional employment classifications fail to capture this critical labour market feature.

To quantify the size of the broader coaching workforce, which includes all volunteers and helpers, requires dedicated survey research. UK Coaching has been commissioning survey research with YouGov for this purpose, since 2017, with samples of between 20,000 – 50,000 adults asked about their involvement in sport and physical activity coaching.

The latest iteration of this report (2022) found that 6% of UK adults stated that they had coached, instructed, trained, taught or led sport or physical activity in the last 12 months.[8] This figure remains the same as in 2017 and 2019 iterations of the same survey and in population terms equates to around **3.1 million active coaches** across the UK.

8 2022 Coaching Workforce Survey (UK Coaching, 2023)

Changing over time

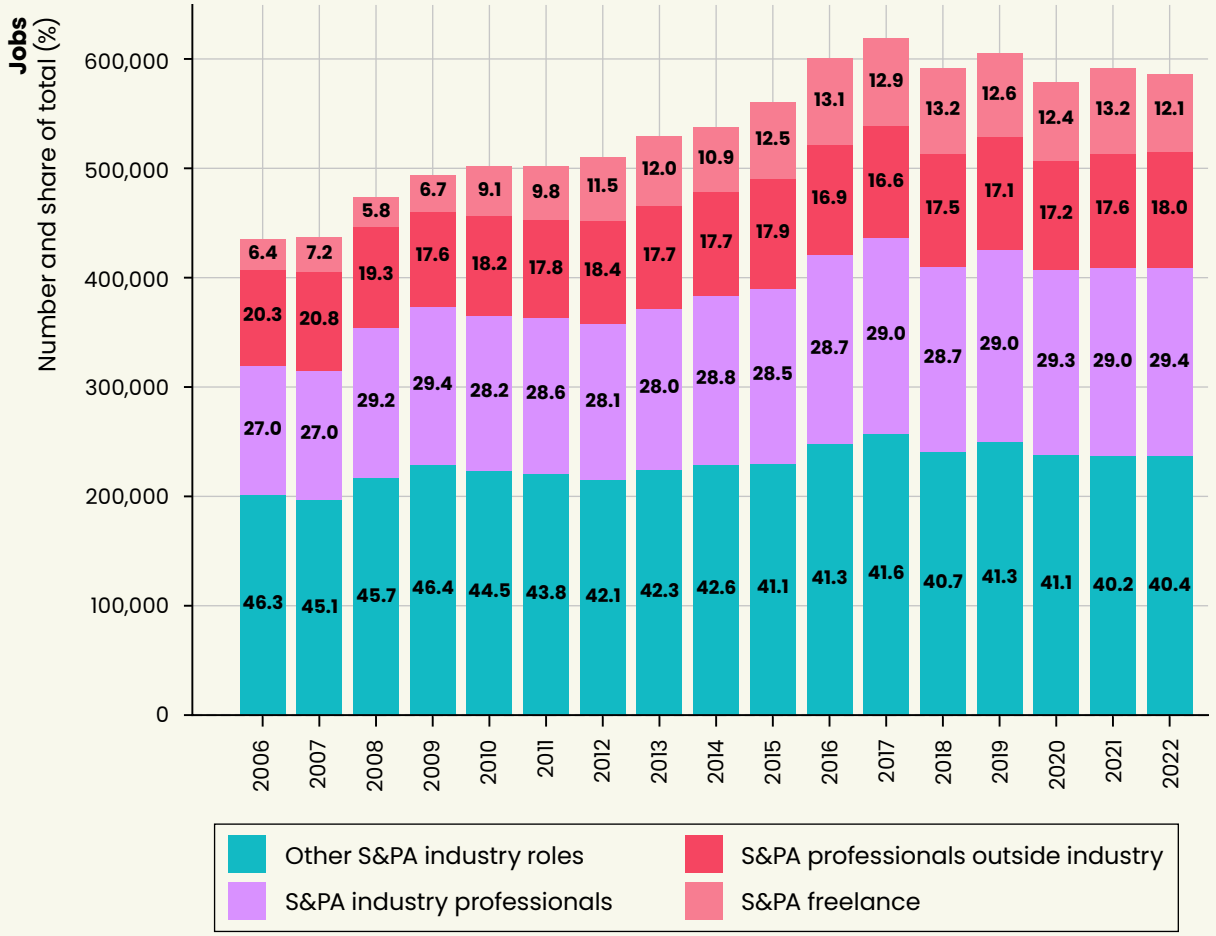
When the 2020 Workforce Insights Report was published, the S&PA workforce was undergoing a period of unprecedented changes due to COVID-19 and the health measures put in place to fight it. As the pandemic has now come to an end, and the labour market has largely stabilised, this report now shows the impact the last few years have had on the S&PA workforce, and how these compare to wider trends over the past couple of decades.

As shown in the chart, between 2019 and 2022 the S&PA workforce lost approximately 26,000 jobs, a drop of 4.3% in the S&PA workforce compared to 2019. Part of this drop is undoubtedly related to the COVID-19 pandemic, and an even bigger loss of jobs, was likely prevented by the introduction of the Government's *Coronavirus Job Retention Scheme*, as well as other sector-specific interventions (see Section 2.3).

Since 2020, the number of jobs in the S&PA workforce overall has grown but it is yet to return to its pre-pandemic levels. Breaking down this number by the different components of the S&PA workforce helps better understand what happened. On one hand, the number of jobs in S&PA occupations has largely recovered to pre-pandemic levels – both within S&PA industries and in other industries, where, in fact, S&PA occupations have even grown slightly compared to pre-pandemic. However, the number of other jobs in S&PA industries is still 5.2% down compared to pre-pandemic, and this is the driving factor behind overall lower S&PA workforce numbers overall.

Jobs in the S&PA workforce over time

UK | 2006-2022 | Cumulative



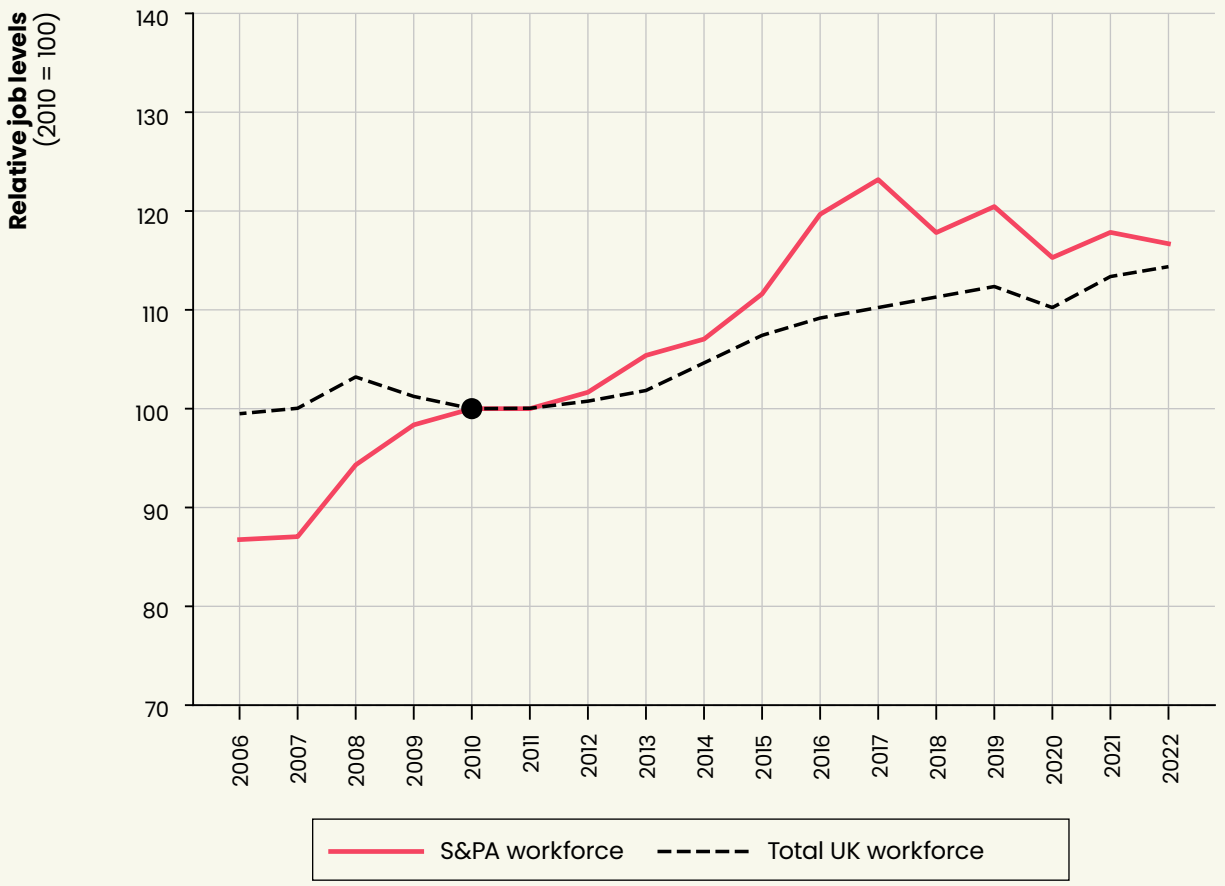
Source: Lightcast Core LMI (2023.1) and ONS APS

These changes to the size of the S&PA workforce since the pandemic need however, to be put into a wider context. Firstly, as the graph shows, the pandemic was the first time in almost two decades when the S&PA workforce saw a drop in overall jobs – something the sector did not even witness during the worst years of the Great Recession (2007 – 2012). Secondly, it is important to note that, after almost a decade of sustained growth, the number of jobs in the S&PA workforce had already started to plateau somewhat from 2017. This was after a period of particularly strong workforce expansion following the highly successful London 2012 Olympics which was accompanied by a general uptick in the UK's overall economic outlook.[9, 10]

Alongside changing in size, the S&PA occupations have also seen a change in composition since the pandemic. While the number of employed/ registered proprietor jobs in S&PA occupations has largely recovered – and even grown compared to 2019 – the number of freelancers in S&PA occupations remains down compared to pre-pandemic levels. This may be linked to wider labour market trends, such as the UK exit from the European Union, and including the post-pandemic labour market being one of the tightest in the UK's history, with firms facing acute labour shortages right across the economy. In this context, some S&PA freelancers may have been enticed to cease freelancing and take-up more stable employment either within the S&PA workforce or outside it, choosing the increased security and reliability this type of employment offers over the freedom of freelancing self-employment.[11, 12]

Relative change in job numbers over time

UK | 2006-2022 | S&PA workforce



Source: Lightcast Core LMI (2023.1) and ONS APS data

9 A boost for employment (International Olympic Committee, 2021)

10 The Economic Importance of Olympic and Paralympic Sport (UK Sport, 2017)

11 Freelance, side hustles, and gigs (McKinsey and Co., 2022)

12 Characteristics of workers in the gig economy (UK Government, 2018)

2.2 Examination of the S&PA occupations

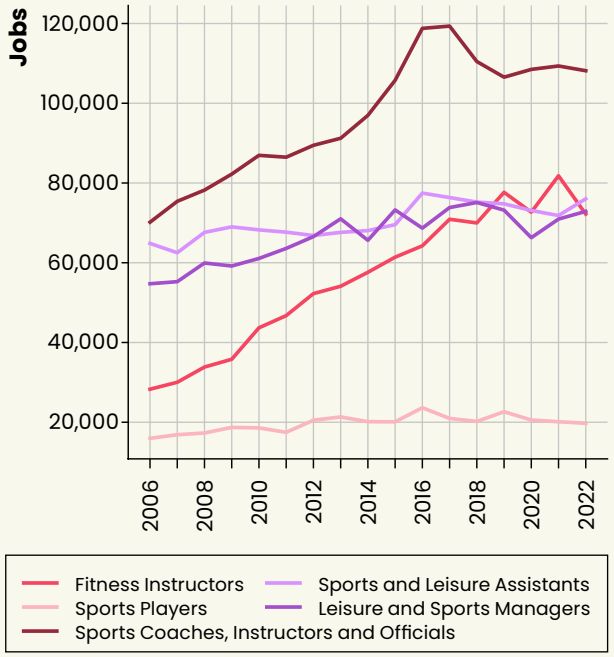
Building upon the overarching figures for the S&PA workforce as whole presented in Section 2.1, this section seeks to shed further light on the changes over time by focusing on developments within the specific S&PA occupations, as well as investigating where these occupations are most typically employed in the economy.

S&PA occupational job trends and characteristics

The figures across show that over the past 15 years some S&PA occupations have grown considerably more than others in terms of both job numbers and their sectoral importance.[13] Fitness instructors – which includes personal trainers – in particular saw sustained and rapid growth up to 2019, growing from approximately 28,000 jobs in 2006 to almost 80,000 (175%). This sharp rise has been largely the result of the proliferation of freelance roles related to the occupation. Sports coaches, instructors and officials have also seen strong growth, particularly during the 2012-2017 period was also in large part due to the growth in the number of freelancers working in the occupation.[14] Overall, sport coaches remain the largest S&PA occupation, having added over 36,300 net new jobs between 2006 and 2019 (52% growth). The other S&PA occupations have seen a more muted level of change over time, albeit still accounting for significant shares of total jobs.

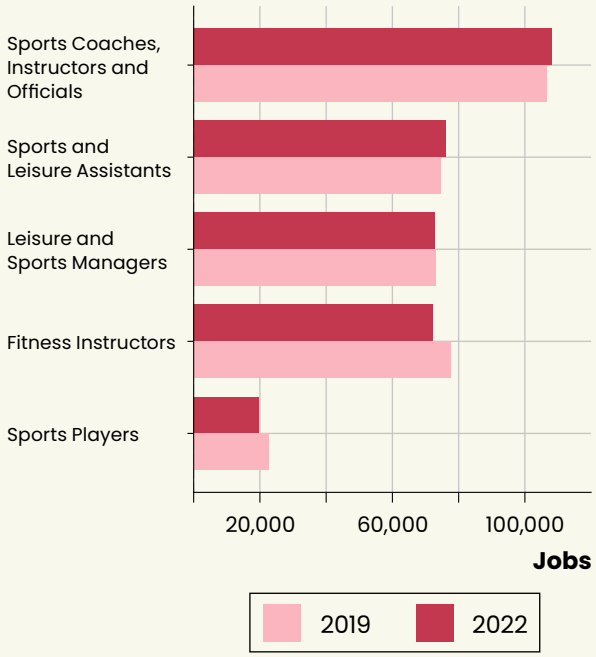
Jobs in the S&PA occupations

UK | 2006-2022 | S&PA SOC4



Job numbers (pre- vs post-COVID)

UK | S&PA occupations | SOC4



Source: Lightcast (2023.1) and ONS APS data

Despite the adverse impact of the pandemic, as of 2022, most of the S&PA occupations have managed to recover to their pre-COVID 2019 levels, or indeed exceed them, as shown in the right-hand chart. Across occupations, many roles were retained during the pandemic by the UK furlough scheme, as well as a range of sector specific supports and, as a result, the employment impact of the pandemic was much less than would otherwise have been the case. Only sports players and – to a slightly greater extent – fitness instructors have lower job numbers in 2022 than before the pandemic.

The integral role freelancing plays for fitness instructors however, as shown in the chart on the next page, sheds some light on why its numbers are recovering slower. Fitness instructors have by far the highest share of its workers classified as freelancers (54% in 2022 or 39,200 individuals). However, consistent with the overall trends for S&PA freelancers, both the number and share of freelance fitness instructor jobs has fallen compared to 2019 (-13.2%). This indicates that freelance fitness instructors leaving the workforce for jobs elsewhere is, at least in part, responsible for the lower number overall in 2022.

13 **Note:** Figures are inclusive of freelancer estimates derived from ONS APS dataset. ONS note these are subject to revision pending further data becoming available and urge caution when interpreting

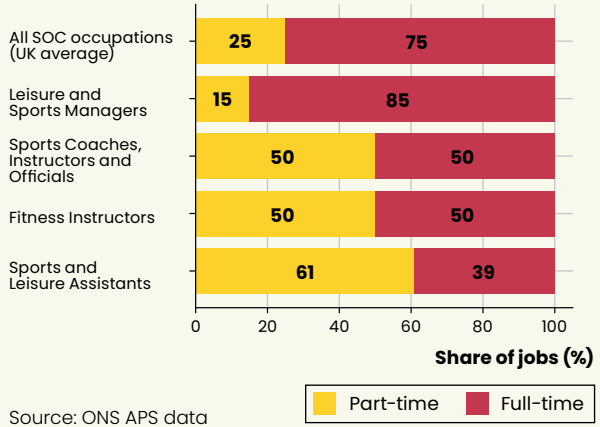
14 Note: The estimated share of freelancers in this group peaked at over 30% in 2017 before subsequently declining back down to 18% by 2019

Another unique feature of the S&PA labour market, and S&PA occupations in particular, is the high share of individuals working in their roles on a part time basis. As shown in the chart across, approximately 50% of both sports coaches, and fitness instructors work part time, according to latest 2022 estimates from the ONS.[15] An even greater share of sport and leisure assistants work part-time (61%) while only leisure and sports managers have a lower share in part time employment than the national average of all occupations, which is approximately 25%.This in turn may negatively affect career pathways within the S&PA workforce as part-time workers are less likely to be promoted to managerial positions.[16]

Similar to the attraction of freelance roles, working part time allows for greater working flexibility, although it can come at the cost of lower average annual earnings, unless supplemented by additional work elsewhere. This in turn affects the type of people attracted to these roles as well as the ability of the sector to retain those workers. While part time work arrangements can be particularly attractive to those seeking flexibility, such as students, the associated lower earnings may make it more difficult to retain these workers over time.

Working time arrangements

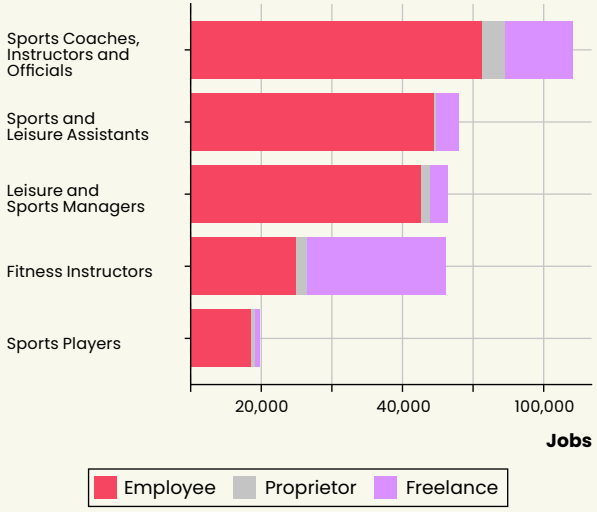
UK | 2022 | S&PA SOC4 occupations



Source: ONS APS data

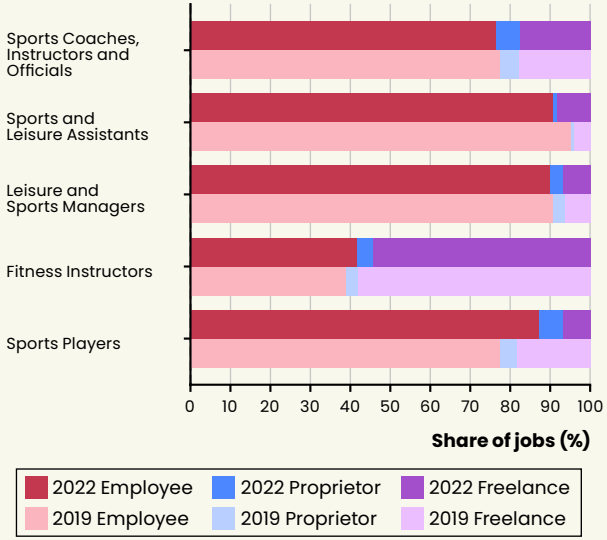
Composition of S&PA occupations

UK | 2022 | SOC4



Employment class of worker

UK | 2019 vs 2022 | S&PA SOC4



Source: Lightcast (2023.1) and ONS APS

15 **Note:** Insufficient sample size data at this time to examine work time arrangements for 'Sports players', for 2022. However, earlier ONS APS estimates suggests that those employed as 'Sports players' are typically employed full time, with between 15%-25% employed part time

16 Rise of the work less workforce (Timewise, 2018)

Employer perspective

Understanding the growth of freelancers within the fitness instructor occupation

Rhys Jones Plymouth Active Leisure CEO

> *My current and former employer use the fact we have employed fitness staff as a unique selling point. This is important in our service and to build rapport and a great customer experience. I have about 12 fitness gym floor staff and I'm actually looking to invest in them to be able to work as more wellbeing coaches. So, I'll have basic entry l2 gym instructors and then a more qualified wellbeing coach who will have additional training and skills. I also have 8 very successful PTs who pay a rent. The fitness class instructors that I have currently are self-employed and that happened due to the Public Performance Licensing (PPL) license a few years ago. Having self-employed fitness class instructors is more flexible for the business and the person.*

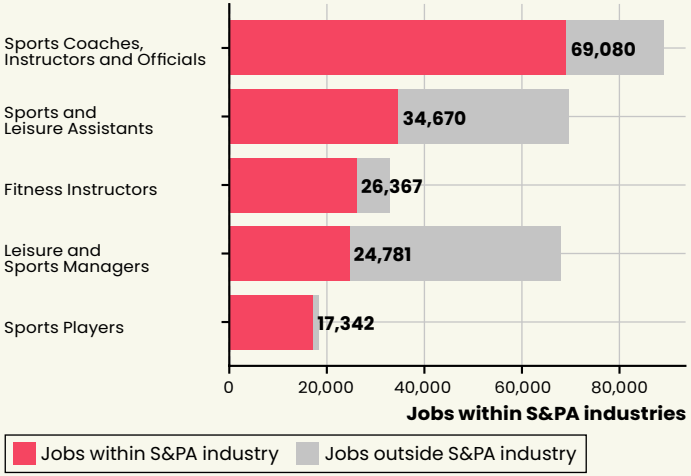
Where are S&PA occupations most typically employed?[17]

The core S&PA occupations identified in the 2020 iteration of this report are central to distinguishing the sector. It is valuable therefore, to update this analysis by examining the extent to which these occupations are still concentrated in terms of employment within S&PA industries. It is also helpful to understand where they are employed outside of the S&PA industry, and whether there has been any significant change in this post-pandemic.

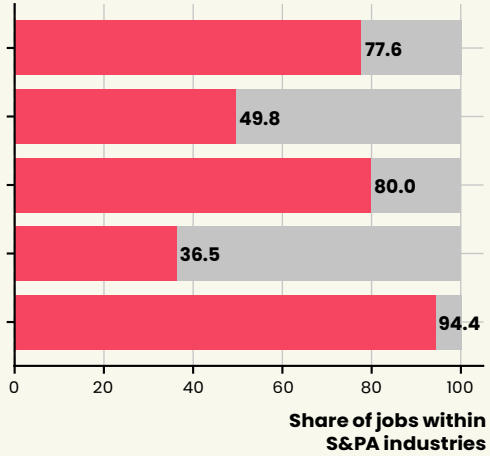
Sports players, fitness instructors, and sports coaches continue to have the largest shares of their total jobs employed in S&PA industries. With approximately 70,000 jobs, sports coaches, instructors, and officials in particular, remains the single largest occupation within the S&PA industry and has seen its employment concentration grow from 74% to 78% compared to 2019.

The most significant changes in S&PA industry concentration, however, relate to sport and leisure assistants and managers, which have seen their share of S&PA industry jobs decline by 5 and 8 percentage points respectively, relative to pre-COVID levels.

Occupations in the S&PA industry
UK | 2022 | SOC4



Share of S&PA occupation jobs in the S&PA industry UK | 2022 | SOC4 | %



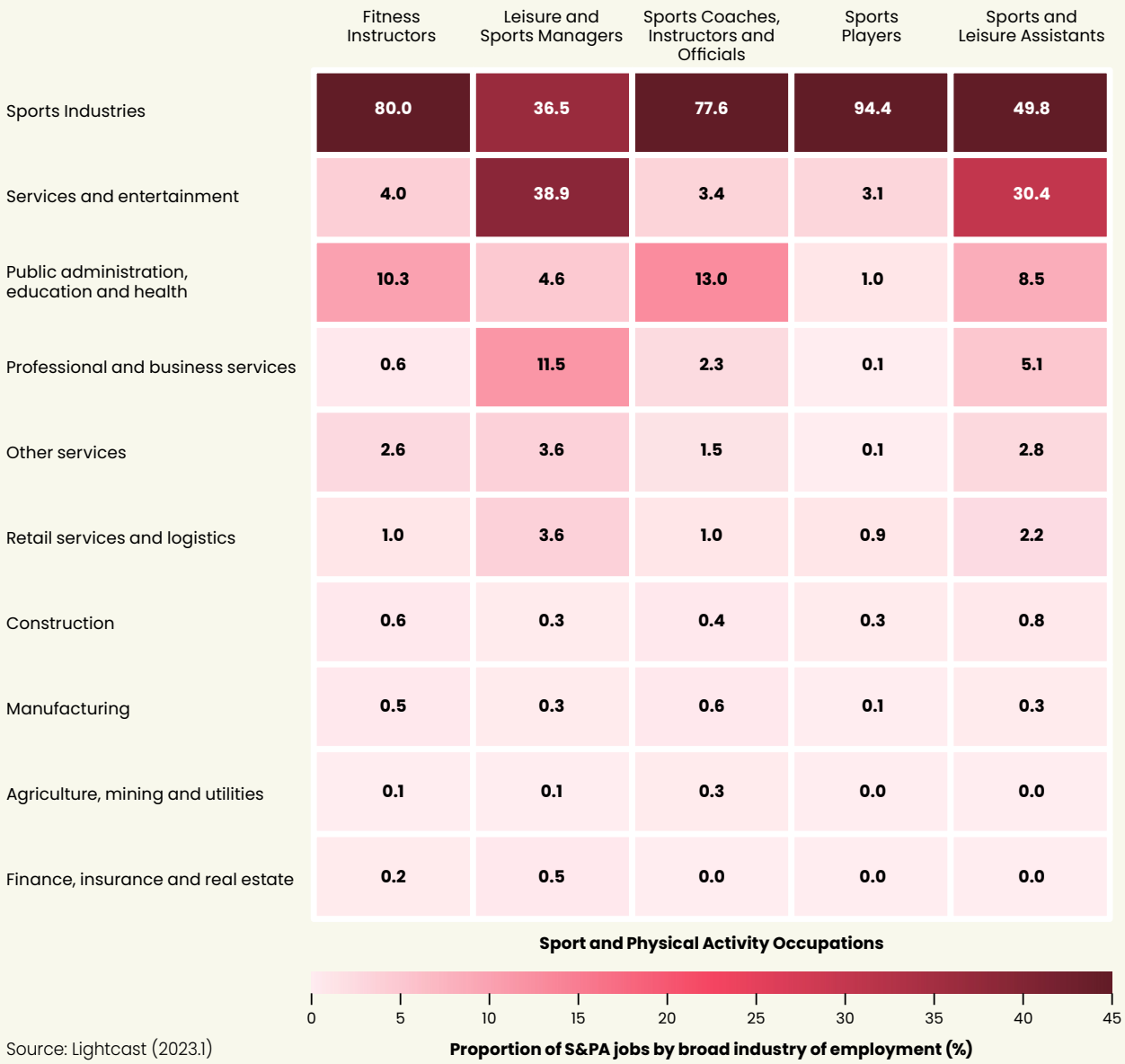
While it is clear that S&PA occupations remain largely concentrated in S&PA industries, they do also work in other areas of the economy. The chart on the following page sets out the distribution across S&PA industries and other broad industry groupings to highlight the variety of settings S&PA professionals can find themselves. All roles appear in most industry groups — even if only in small numbers.

Beyond S&PA industry workplaces, for example, fitness instructors and sports coaches are most likely to be found in public services, education or healthcare settings. This might include a fitness instructor in a college gym or a dedicated university sports coach. These industries remain an important source of labour market opportunity for S&PA occupations outside of the S&PA industry. They also represent a potential pool of additional talent for recruiting firms in S&PA industries.

Leisure and sport roles (assistants and managers) – the occupations with the largest and growing shares outside the industry – are most likely to be found in the hospitality services and entertainment sectors. This likely reflects their broad definition within the ONS SOC taxonomy, with large parts focused on leisure rather than sport. Relative to 2019 levels, these two occupations have also seen growth in professional/business services as well as education and health.

17 **Note:** Employment figures in this subsection excludes freelance estimates

Industry distribution of S&PA occupations



Source: Lightcast (2023.1)

2.3 Examination of the S&PA industries

Similar to Section 2.2, this section will seek to further explore the characteristics of, and recent developments within, the specific S&PA industries.

Impact of the COVID-19 pandemic

It is now well understood that the impact of the COVID-19 pandemic and related public health restrictions introduced by governments, were not felt equally by all sectors of the economy. In the UK, some sectors such as ICT, manufacturing and public administration were able to continue operations as normal for much of the pandemic period – either thanks to adoption of remote work practices or having been designated as an essential service. In contrast, people-facing sectors such as hospitality, and arts and recreation (including sport and physical activity) had little choice but to cease trading. This was due to the fact that these sectors, given the nature and environment of their work, struggled to operate within even relatively low-level public health restrictions and, as such, were heavily dependent on Government support for much of the pandemic.

Using data from the UK Government's Coronavirus Job Retention Scheme (CJRS or furlough), the next chart illustrates the scale of the impact of the pandemic on S&PA industries by looking at employee furlough take-up rates at different stages throughout the pandemic.[18]

18 **Note:** The 'Sports Activity' SIC3 industry group includes all S&PA SIC4 industries, except for 'Sports and Recreation Education'. It is not possible to disaggregate this from the broader 'Other Education' SIC3 industry group, using HMRC's published CJRS statistics

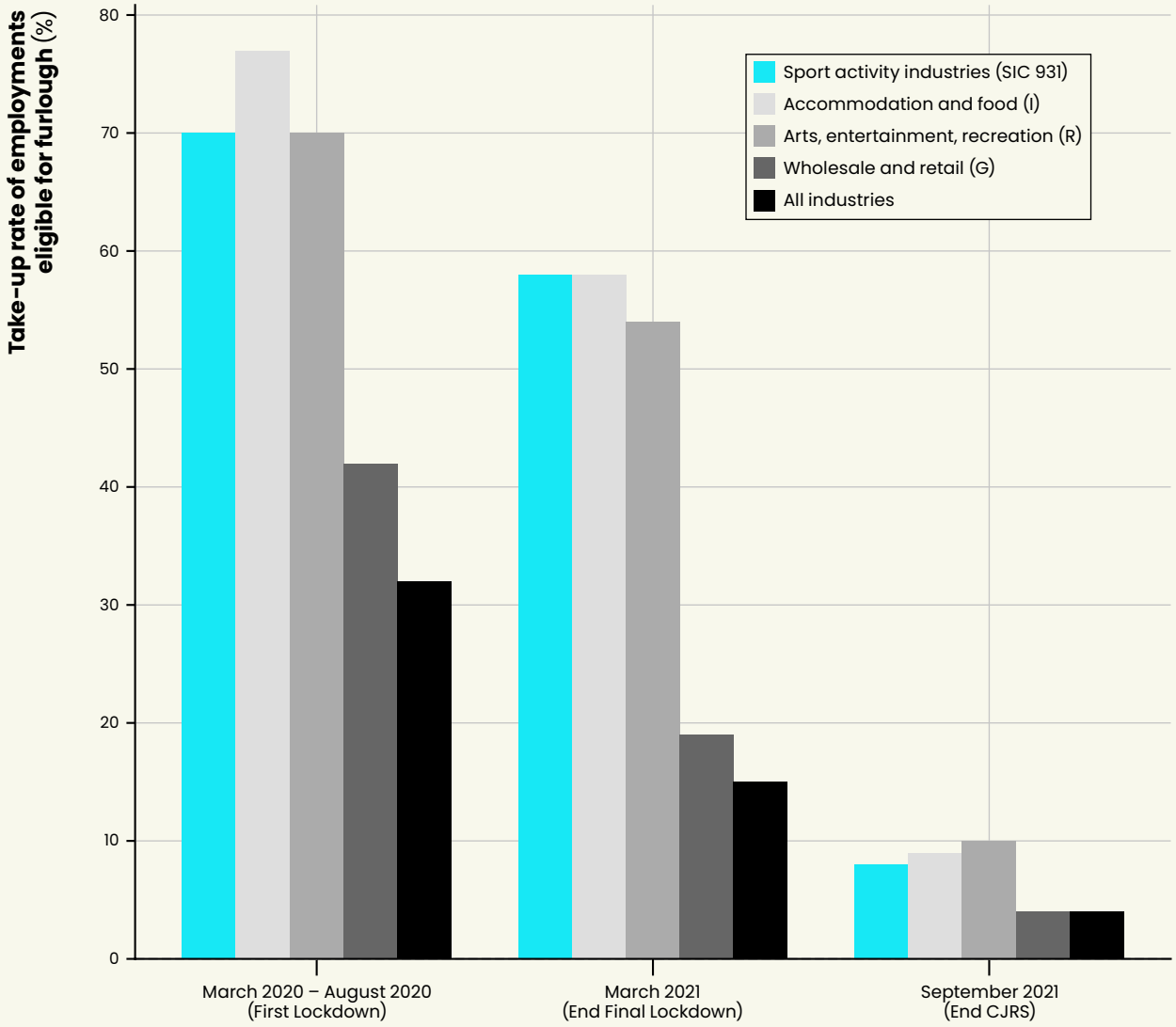
Some 70% of eligible employment in the sport activity industries received support through the CJRS during the first national lockdown in early 2020. This compares to 32% for all industries, reflecting the disproportionate impact of restrictions on sport industries. Despite workers and firms trialling a number of innovative solutions to restart their businesses under restrictions, dependence on the CJRS remained high for the sport industry (and other customer facing industries) until the end of the final lockdown in March 2021 after which take-up declined sharply with firms able to restart operations. At the time the CJRS ended in September 2021 take-up for the sport industries was approximately 8%, slightly less than other comparable sectors, but still higher than the average for all sectors (4%).

Prior to COVID-19 overall S&PA industry job numbers had been approximately 425,000, up 18.7% (67,000 jobs) compared to the 2012 depths of the Great Recession. The chief contributor to this net job creation was the operation of sports facilities, which added over 24,500 jobs over the time frame. However, in terms of job growth rate, the sports and recreation education industry grew the fastest, approximately 116% between 2012 and 2019, adding 13,600 jobs in the process.[19]

19 **Note:** The jump in growth in fitness facilities' from 2007 may reflect its clearer emergence as an industry following the creation of the current SIC taxonomy in that year — see previous chapter's discussion on the challenges of industry classification. While the ONS does provide backward classification for previous years, this is not always wholly accurate with relatively younger industries

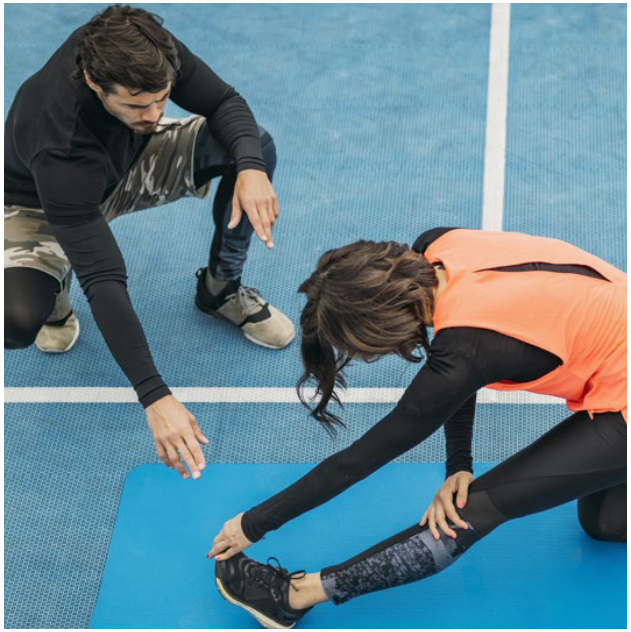
Comparison of CJRS take-up rates

2020-2021 | SIC1 & SIC3



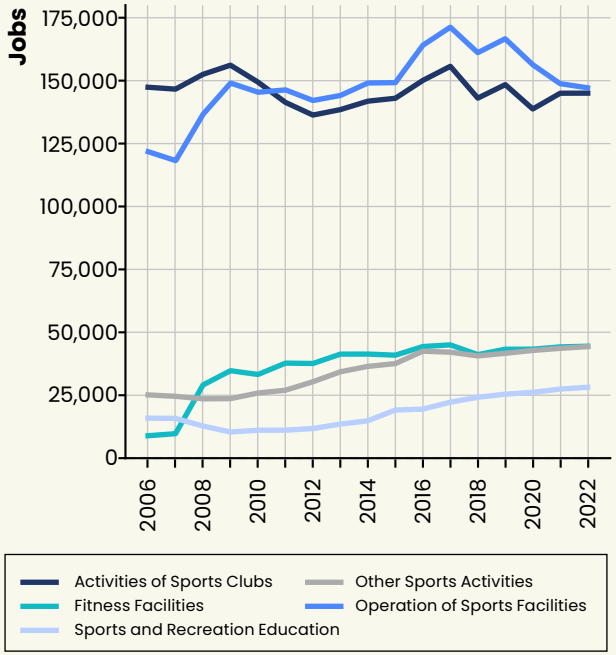
Source: HMRC, Coronavirus Job Retention Scheme statistics, 2021

Compared to pre-COVID levels, total jobs in S&PA industries are down 3.8% as of 2022, driving the decline in the S&PA workforce overall. As with S&PA occupation job numbers, the availability of the CJRS significantly dampened the employment impact of the pandemic on the S&PA industries, preserving a huge number of jobs that would likely have been lost in its absence. In saying this however, the impact of the pandemic is still clearly evident on the S&PA industries, particularly the two largest industries, the activities of sports clubs, and, the operation of sports facilities, which both fell sharply in 2020. Between 2019 and 2021, the number of jobs in the operation of sport facilities industry in particular dropped by 10.7% (almost 18,000 jobs) and has not yet started to return to its pre-pandemic levels.



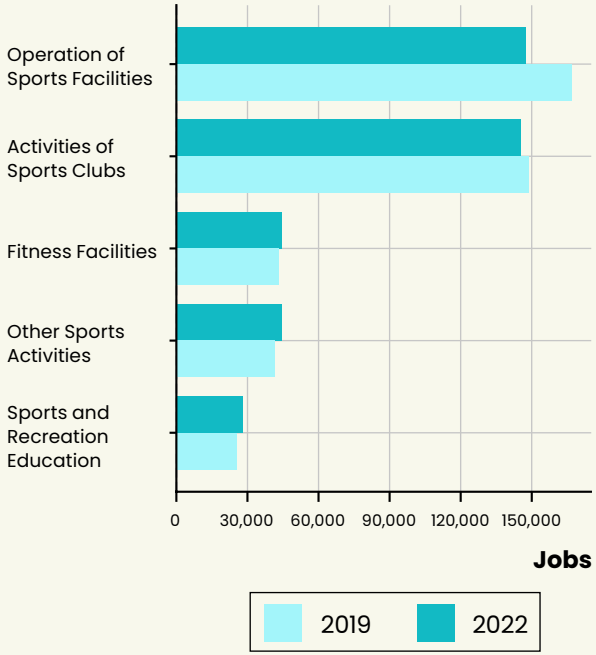
Jobs in the S&PA industries

UK | 2006-2022 | S&PA industries | SIC4



Job numbers (pre- vs post-COVID)

UK | S&PA industries | SIC4



Source: Lightcast (2023.1)

Who else is employed in S&PA industries and how has it changed?

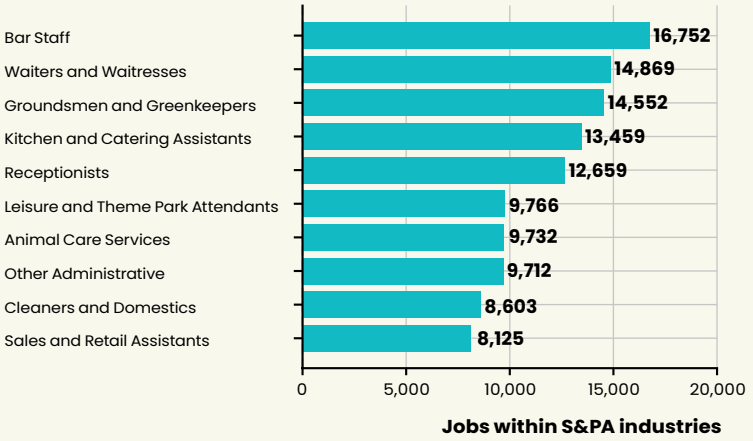
To better understand recent developments in the S&PA industries it is important to get a sense as to who else works in the industry beyond the core S&PA occupations. Indeed 'other' occupations account for the largest share of job numbers in S&PA industries, approximately 58%.

As shown in the figure, hospitality and front-of-house roles dominate other roles in S&PA industries. These include bar staff (4.1% of other roles in S&PA industries), waiters and waitresses (3.6%), kitchen assistants (3.3%), and receptionists (3.1%). While critical to the S&PA industry, these supporting roles are not heavily concentrated within the sector (as shown in the right-hand chart), with a wide variety of roles elsewhere in the economy.

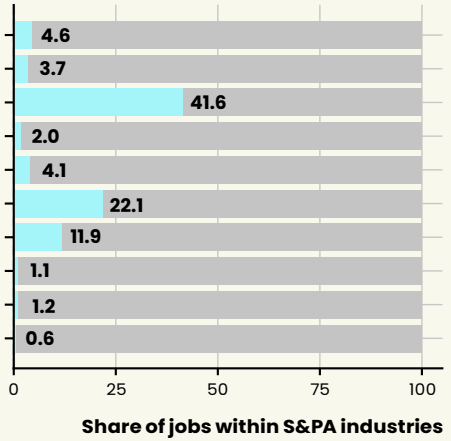
In comparison, other large occupations that are more closely related to S&PA activities are typically quite heavily concentrated in S&PA industries, including groundskeepers and greenkeepers (41.6%) as well as leisure and theme park attendants, and animal care service occupations not elsewhere classified (22.1% and 11.9% respectively).

Comparing occupational employment figures pre- and post-pandemic for the S&PA industries overall reveals that the decline has mostly been the result of a net reduction in jobs in these other occupations, as well as from sport and leisure assistant roles.

Top non-S&PA occupations working in the S&PA industry UK | 2022 | SOC4



Share of non-S&PA occupations in the S&PA industry UK | 2022 | SOC4

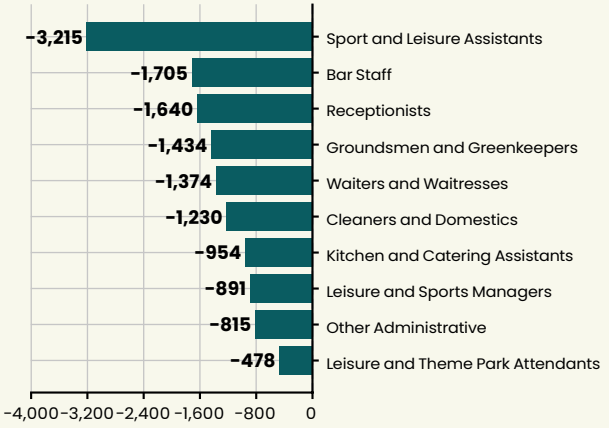


Source: Lightcast (2023.1)

These overall net job loss changes in S&PA industries can best be understood in the context of the most impacted S&PA industries; the operation of sports facilities, and the activities of sports clubs. These industries typically encompass big sporting event operations (such as stadiums, arenas, etc) that were among the last to reopen fully to the public post-COVID.

Less jobs in the S&PA industry

UK | 2019 vs 2022 | SOC4



Source: Lightcast (2023.1)

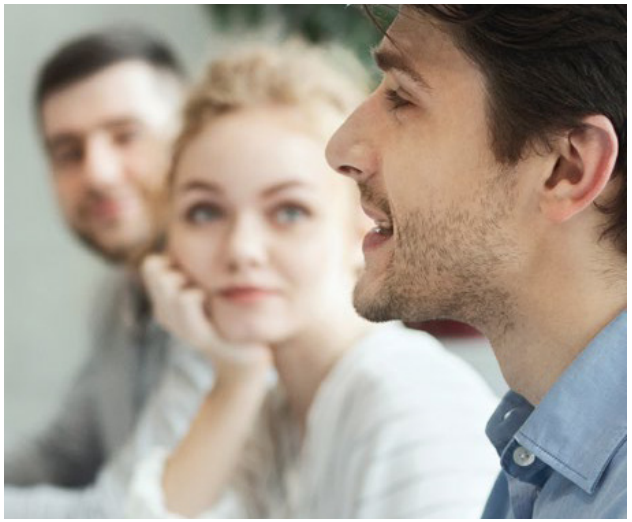
As the economy did gradually reopen post-COVID however, demand for labour surged, with service and general staff being among the most highly sought after.[20] The high demand for labour post-pandemic is likely to have resulted in increased labour market opportunities for workers, some of which may have been enticed away by the prospect of higher wages and/or improved employment conditions elsewhere in the economy. As such, it may be the case that, during the prolonged period of mandated closure for some S&PA industries, their staff moved on to other jobs within S&PA, outside of the S&PA sector – or indeed changed occupation altogether – as positions became available. The typically lower pay of these S&PA jobs, as shown in the table below, may also have contributed to some workers' decisions to move.

The fact that some S&PA industries – such as the operation of sport facilities – have not yet returned to their pre-COVID levels might be due to a number of reasons, such as decreased demand post-COVID, talent attraction and retention challenges, improved efficiency thanks to automation and digitalisations, or cost saving measures.

20 **Business insights and impact on the UK economy (September, 2021)**

21 **Note:** Jobs data is for 2022 (latest available figures for other metrics are 2021)

Looking a little deeper in terms of earnings per worker (EPW) in the specific S&PA industries shows clear variation across the sector. The operation of sport facilities and fitness facilities are at the lower end, averaging just over £14,500 per annum while other sports activities has the highest EPW at £30,800. Relative to the average of all industries in the UK economy (£30,300), the majority of S&PA industries have significantly lower earnings per worker. While these lower earnings may be linked to a higher share of the workforce working part time, these lower earnings may also make S&PA jobs less attractive to workers in a tight labour market, making it more difficult for S&PA businesses to attract and retain talent.



S&PA industries – key metrics overview[21]

UK | 2022

SIC4 industry	Jobs*	Earnings per Worker (EPW)	Enterprises	Workplaces
Operation of Sports Facilities	147,170	£14,760	4,850	7,640
Activities of Sport Clubs	145,040	£23,300	9,060	9,610
Fitness Facilities	44,450	£14,560	4,040	5,250
Other Sports Activities	44,310	£30,800	10,740	10,960
Sports and Recreation Education	28,160	£19,840	4,110	4,220
Sport related industries	409,130	£19,820	32,790	37,670

Source: Lightcast (2023.1)

A participant view of the S&PA workforce[22]

S&PA: A participant focused sector

In 2022, CIMSPA launched an augmented occupational view of the S&PA workforce, which builds on the core S&PA industry and occupational definition outlined earlier in the chapter, but reconfigures it so as to be centred around the end-participant.[23] The objective of this definition is to better define the S&PA workforce in terms of worker's occupations which typically sit within two overarching categories; front line and support chain; each including S&PA sector and non-sector occupations as well as all types of employment.[24] These two categories are defined as follows:

- **Front Line:** Occupations in the S&PA workforce directly servicing the needs of the participant. These include, among others, roles such as, personal trainers, sports coaches, physiotherapists, bar staff, lifeguards, or receptionists.
- **Support Chain:** Occupations in S&PA servicing the needs of the front line and/or the facilities. These include, among others, roles such as, sport centre managers, groundskeepers, animal care staff, maintenance operatives, or administrative occupations.

There is also a third element to this definition, the **Extended Workforce** which includes enablers and influencers of S&PA but are not necessarily part of the sector workforce.[25] These include, among others, roles such as, teachers and teaching assistants, sport event volunteers, parents, or sport role models.

As shown in figure, almost two thirds (64%) of workers within the S&PA workforce fall under the 'frontline' component of this definition. This is indicative of a client facing, participant-oriented sector where focus is very much on catering to the needs of the end user.

22 **Note:** The SOC4 occupational classification for each of these groups can be found in an appendix to this report. Frontline and Support Chain S&PA occupations working outside S&PA industries include only those core S&PA SOC4 occupations

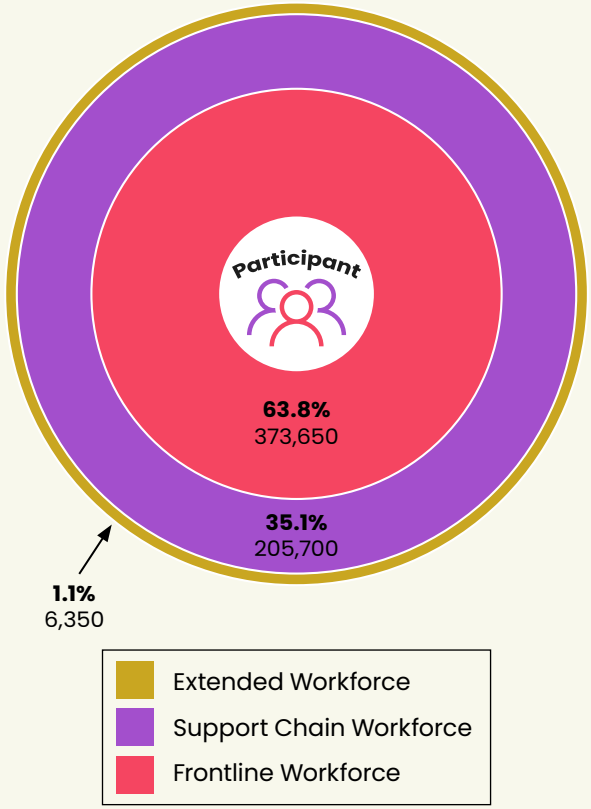
23 CIMSPA (2022) – Defining the UK Sport and Physical Activity Sector Workforce

24 **Note:** Whilst occupations are identified as being independent of each other for the purpose of this analysis, it is quite common for a member of the workforce to have multiple roles in different areas. Furthermore, some occupations have front line and support chain elements but here are classified discreetly

25 **Note:** For the purpose of this analysis, the extended workforce includes only paid employment roles that fit this criteria as identified through Lightcast's staffing pattern matrix, such as teachers and excludes unpaid roles such as volunteers, parents and influencers

CIMSPA occupational view of workforce

UK | 2022 | Share of jobs in S&PA workforce | %

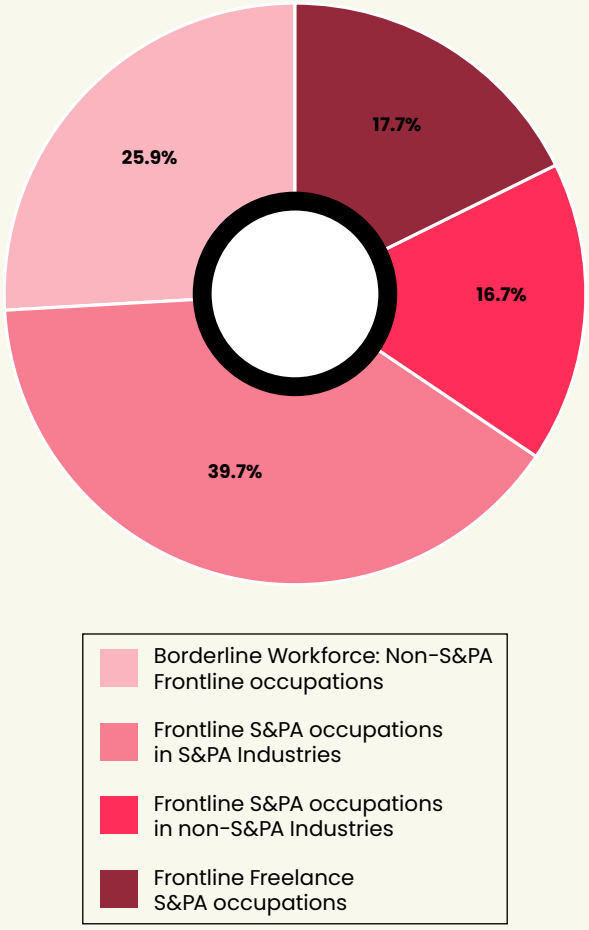


A participant view of the S&PA workforce (continued)

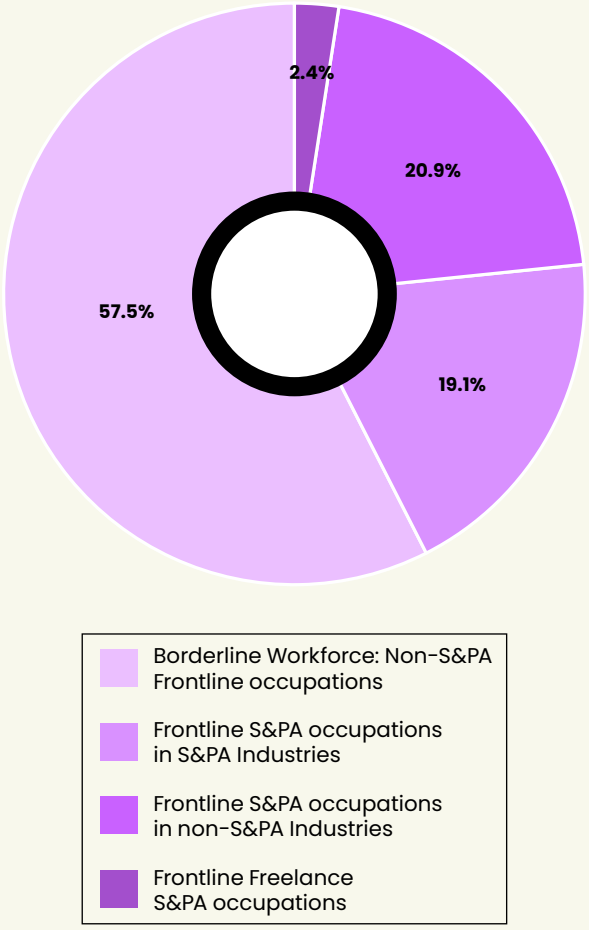
CIMSPA's alternative occupational definition also provides for further differentiation within the two primary categories looking at 'sector-specific' S&PA and 'broader workforce' roles.[26] Looking within the two primary elements of this definition it is clear that in each case, the S&PA workforce relies on more than just core S&PA roles. Over a quarter (26%) of frontline roles relate to the broader workforce working in the industry, while close to 60% of support chain workers are non-S&PA occupations.

Considering this definition relative to pre-COVID levels, it is the frontline, broader workforce subcategory that has been among the most impacted by the pandemic, consistent with Section 2.3. Frontline S&PA freelancer estimates have also seen a significant decline.

Composition of 'frontline' occupations
UK | 2022 | %



Composition of 'support chain' occupations
UK | 2022 | %



26 **Note:** In line with CIMSPA's outlined definition, the 'sector workforce' is slightly more expansive than the five core S&PA SOC occupations outlined previously. For example, for frontline, in addition to core occupations, this includes physiotherapists working in the industry, while the support chain sector workforce also includes groundsmen and grounds keepers. Frontline and Support Chain S&PA occupations working outside S&PA industries include only those five core S&PA SOC4 occupations outlined previously

A company classification of the sport workforce[27, 28]

An alternative way to define the sport and physical activity workforce is to start from companies rather than official industry and occupation classifications, and identify all the companies that belong to the S&PA sector.

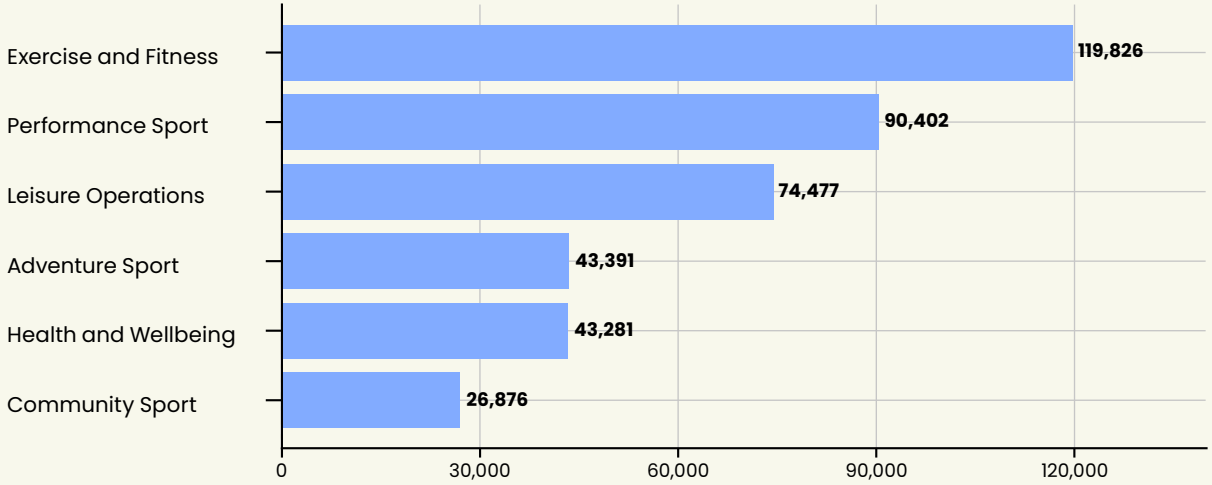
This is the approach proposed by The Data City, which aims to overcome the shortcomings of the official Standard Industry Classification (annex 1). This approach, however, does not include any unincorporated businesses and is reliant on companies accurately updating their employment information on a regular basis.

Using this approach, the size of the sport workforce is estimated to be approximately 348,800. This can further be broken down across CIMSPA's core S&PA industries, with exercise and fitness, and performance sport estimated to be the two largest at almost 120,000 and 90,000 respectively.

It is important to note however, that, similar to the official standard SIC classification, this definition includes only paid employment. As such, it underrepresents the sizes of some industries. The community sport sector, for example, has a very high share of volunteer workers which are not accounted for in these figures.

Estimated number of employees

UK | S&PA related companies



Source: The Data City (company data)

While the analysis of this chapter has sought to quantify the size and composition of the S&PA workforce in terms of industry and occupational job numbers as well as employment characteristics, it reveals little about the individuals delivering critical services in S&PA professional roles. Understanding the current diversity of age, gender, ethnicity, disability, and socio-economic status across S&PA professionals is essential for workforce planning, especially as the sector looks to build a more inclusive and representative workforce going forward. Examining these core demographics will be the focus of Chapter 3.

27 **Note:** Some companies can be classified as being part of a number of the sport and physical activity industries and, therefore, the cumulative employee number for all sport core-industries exceeds the total for The Data City definition

28 For some companies, it is not possible for The Data City to provide a best estimate of current employee numbers

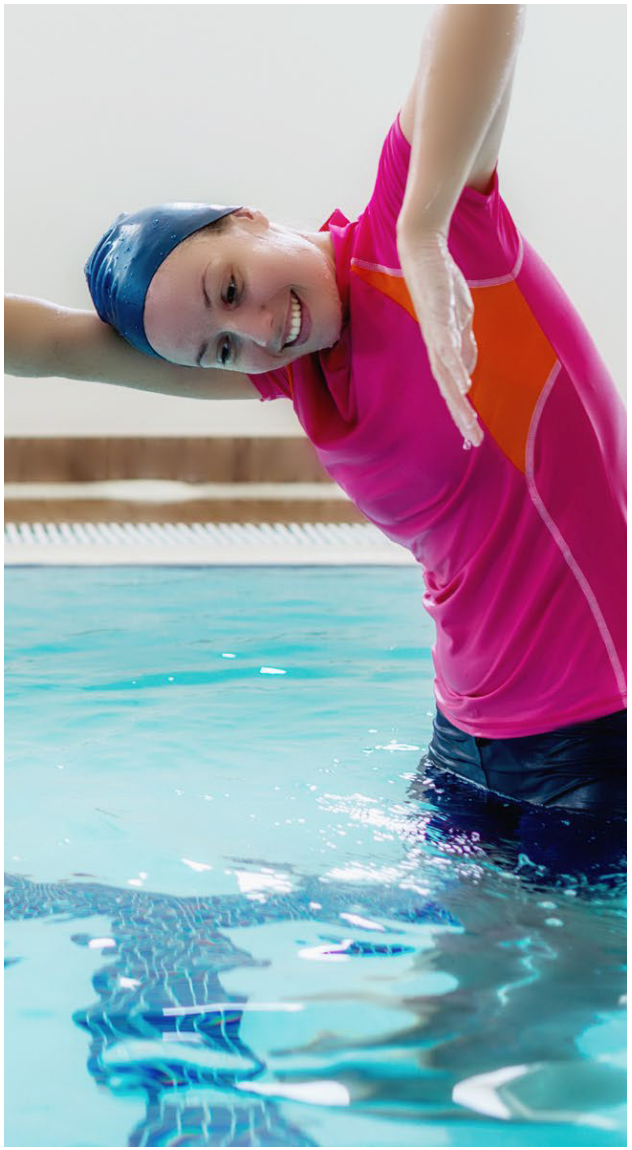
CIMSPA

Chapter 3

Workforce demographics

Key insights

- **Sport and physical activity core occupations tend to be less diverse than the UK-wide workforce.**
- **Age:** On average, workers in the S&PA occupations are young with 30% of jobs held by those between 16-24 years of age, three times the average of all occupations. Sports coaches, sports players, and sport and leisure assistants have the youngest worker demographics.
- **Gender:** Compared to the average, S&PA occupations are more likely to be male, although there are signs that this is changing. The share of male workers in these occupations overall is 56%, down from 62% in the previous Workforce Insights Report (2020). This is despite women accounting for a larger share of part-time workers in the overall economy.[29]
- **Disability:** Fewer workers within the S&PA workforce report having a disability (13%), compared to the average of all occupations (16%). This is likely linked to the age profile of the S&PA workforce and to the physical demands of S&PA roles.
- **Socio-economic:** Compared to the wider workforce, the S&PA workforce has a higher proportion of workers in lower socio-economic groups (LSEGs), driven by higher shares of students and semi-routine occupations (28% vs 23% workforce-wide). S&PA occupations also have a higher proportion of small employers and own account workers (23% vs 9% workforce-wide) consistent with the importance of freelancers to the sector.
- **Ethnicity:** On average, S&PA occupations are less diverse than the UK-wide workforce with more than 87% of S&PA occupations being of White British ethnicity compared to 79% elsewhere. White Other and Black are the second and third most represented ethnicities within the S&PA workforce. Looking across the S&PA occupations, sports players, and fitness instructors are the most diverse in terms of ethnicity, although both are below the wider workforce average.



29 Women and the UK economy (2023) House of Commons Library. Research Briefing

This chapter investigates the demographics composition of the Sport & Physical Activity (S&PA) workforce and how this compares to the wider UK workforce. The aim of this investigation is to provide insights on the state of the workforce delivering in S&PA roles across multiple dimensions, from age and gender to ethnicity, disability, and socio-economic status.[30]

Understanding the demographics profile of the S&PA workforce is crucial for two reasons. Firstly, these insights make it possible to set out workforce planning strategies aimed at promoting diversity and inclusion within the sector. Secondly, it helps identify the specific reasons behind retention challenges in the sector as well as solutions to address them.

Yet, given the size of the key occupations in the industry, gathering data on demographics for the S&PA workforce comes with its challenges. This is due to the fact that the key source for demographic insights is the Office for National Statistics Labour Force Survey (LFS), whose quality is dependent on the sample size of its respondents. Therefore, to overcome this challenge, the analysis presented in this chapter combines together multiple quarters of LFS data to ensure robustness and reliability of the findings. However, this comes at the cost of being able to track meaningful changes over time, especially in relation to the demographic components with the smaller sample size, such as ethnicity.

30 In addition to these insights, Lightcast has also been seeking approval from the Office for National Statistics to access data on the sexual orientation of the S&PA workforce. At the time of writing the report, Lightcast has not yet been granted access to this dataset. If approved by the ONS, Lightcast will add insights on the sexual orientation of the S&PA workforce in an updated version of the report

3.1 Age and gender

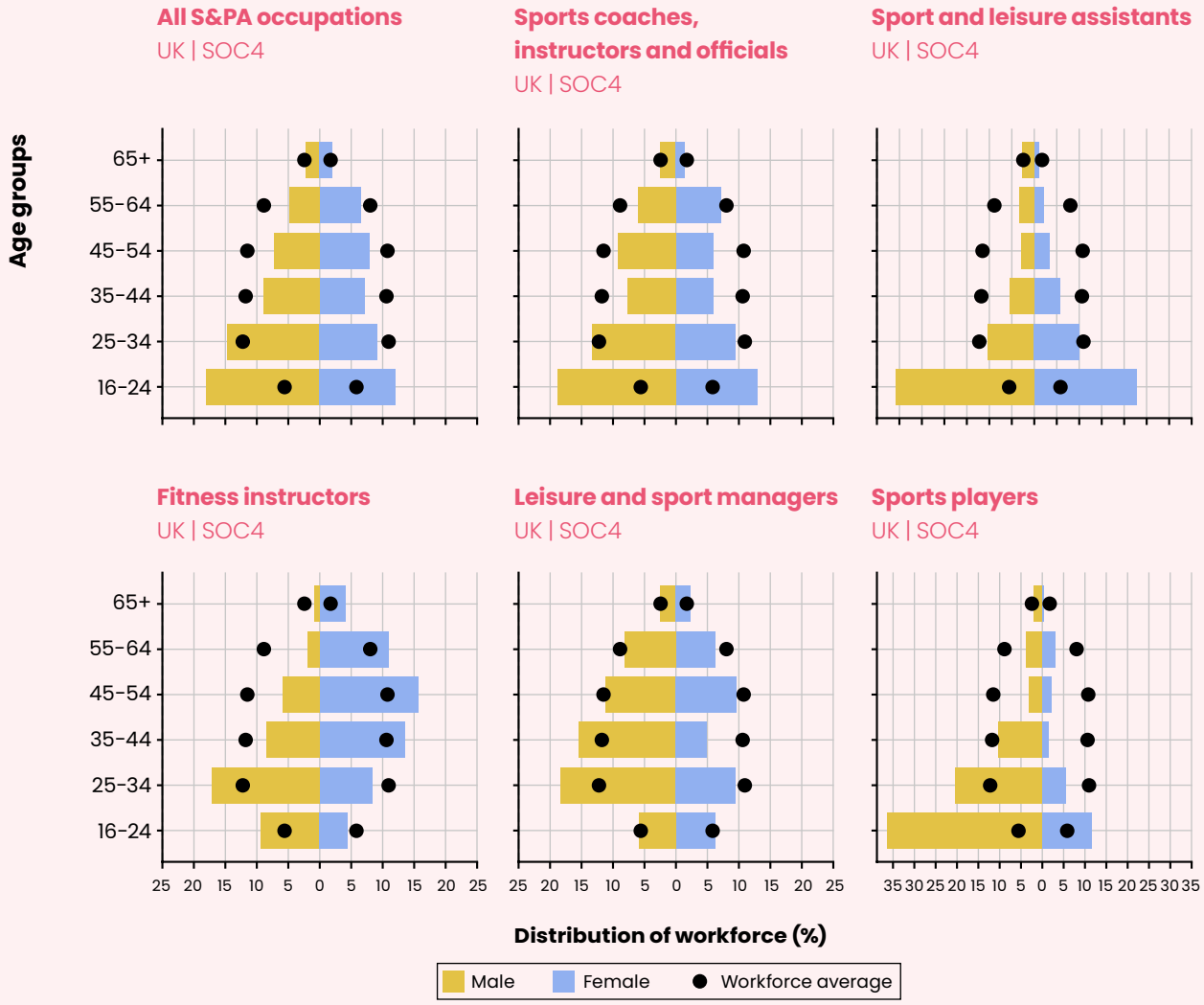
This first section looks at the S&PA workforce through the lenses of gender and age and the combination of the two.

To conduct the analysis on both these dimensions twelve quarters of LFS data (three years) were used. In terms of gender, the question asked by the LFS focuses on the current sex of the respondents and offers a binary option only of either 'male' or 'female'. This is a significant limitation of the LFS dataset, meaning it is not possible to identify any further group. In terms of age, the respondent provides a specific number and these have then been aggregated into six categories, 16-24, 25-34, 35-44, 45-54, 55-64 and 65+. The data has then been presented using a 'population pyramid' style of analysis, combining age and gender, providing insights for each individual S&PA occupation and for the occupations in aggregate, with the dots showing the level across the UK workforce as a whole.

The emerging picture is that of an overwhelmingly young and male workforce. Across all S&PA occupations, 30% of jobs are held by 16-24 year olds and an additional 24% by 25-34 year olds. This is three times higher than the average for the UK-wide workforce, and even higher for sport players and sport and leisure assistants, where 16-24 years old account for 48% and 53% respectively of the jobs. While it is a strength of the sector that it is attractive to young professionals it consequently also carries a greater risk of higher worker turnover. It is therefore essential to ensure that clear career pathways through the sector are communicated and available.

Similarly, the S&PA workforce is more male-dominated than the UK-wide workforce, albeit this appears to be slowly changing. Overall, 56% of jobs in S&PA occupations are held by men compared to 52% for the UK-wide workforce. This is once again particularly the case for sport players, with three in four people working in this occupation being men. While still strong, this trend may be slowly changing as the previous Workforce Insights Report showed men accounting for an even larger share of jobs in S&PA occupations (62%).

Behind these general trends there are also a number of exceptions that stand out. Firstly, the age distribution of leisure and sport managers is much more in line with that of the wider UK workforce. Secondly, fitness instructors is the only S&PA occupation predominantly female (57%). Thirdly, while the age distribution of different occupations is broadly similar for most occupations, this is not the case for fitness instructors, such as exercise and class instructors, where men tend to be much younger while women are most represented in the 45-54 age bracket. These differences suggest that while physical demands and pay levels may help explain the large prevalence of young workers in the sector and the drop in mature workers, career pathways actually vary by different demographic groups. This is something worth investigating further as Sports England is currently doing as part of its Lived Experience research.



Source: ONS, LFS (12 quarters of data pooled)

Case study

The perspective of +35-year-old women moving into in the sector

In June 2023, a social media survey of S&PA practitioners conducted by CIMSPA found that 65% of women over 35 years of age that were working in the S&PA sector had joined from outside the sector, highlighting the shift in gender dominance of females at different age brackets, in particular for fitness instructor roles.

I was a performance analyst for a water company which was very high pressured. We moved south when I was pregnant (2nd child) and didn't go back to work.

I decided to retrain as a personal trainer when I saw the results of my own transition and learnt so much about the female body that I realised I needed to do more of a personal performance analysis and start educating my clients about how to eat and train correctly.

It hasn't been easy and I don't make as much money as my corporate job, but the balance the job provides me around my children and my husband (who has a very stressful job) has been amazing and the sense of achievement and fulfilment is far greater than any job role that I have ever done.

The gym and training has helped with my mental health significantly too. Training is away of life for me and I want to help others to figure this out too rather than leaning on the medical profession.

Ultimately, I have 2 daughters, and I have never been more passionate about empowering them and educating them and females in all the things that I wish I knew when I was younger.

Jullianna *Personal trainer and online coach, Angmering, West Sussex*

I see my new career as an extension of my other career. I am a community pharmacist and have built my new business (personal training and nutrition coach with an emphasis on midlife clients) with the intention of providing a holistic approach for my clients.

I chose to work in fitness to extend my influence on positive lifestyle changes in the people I support.

Deirdre *Personal trainer and registered pharmacist, Abingdon, Oxfordshire*

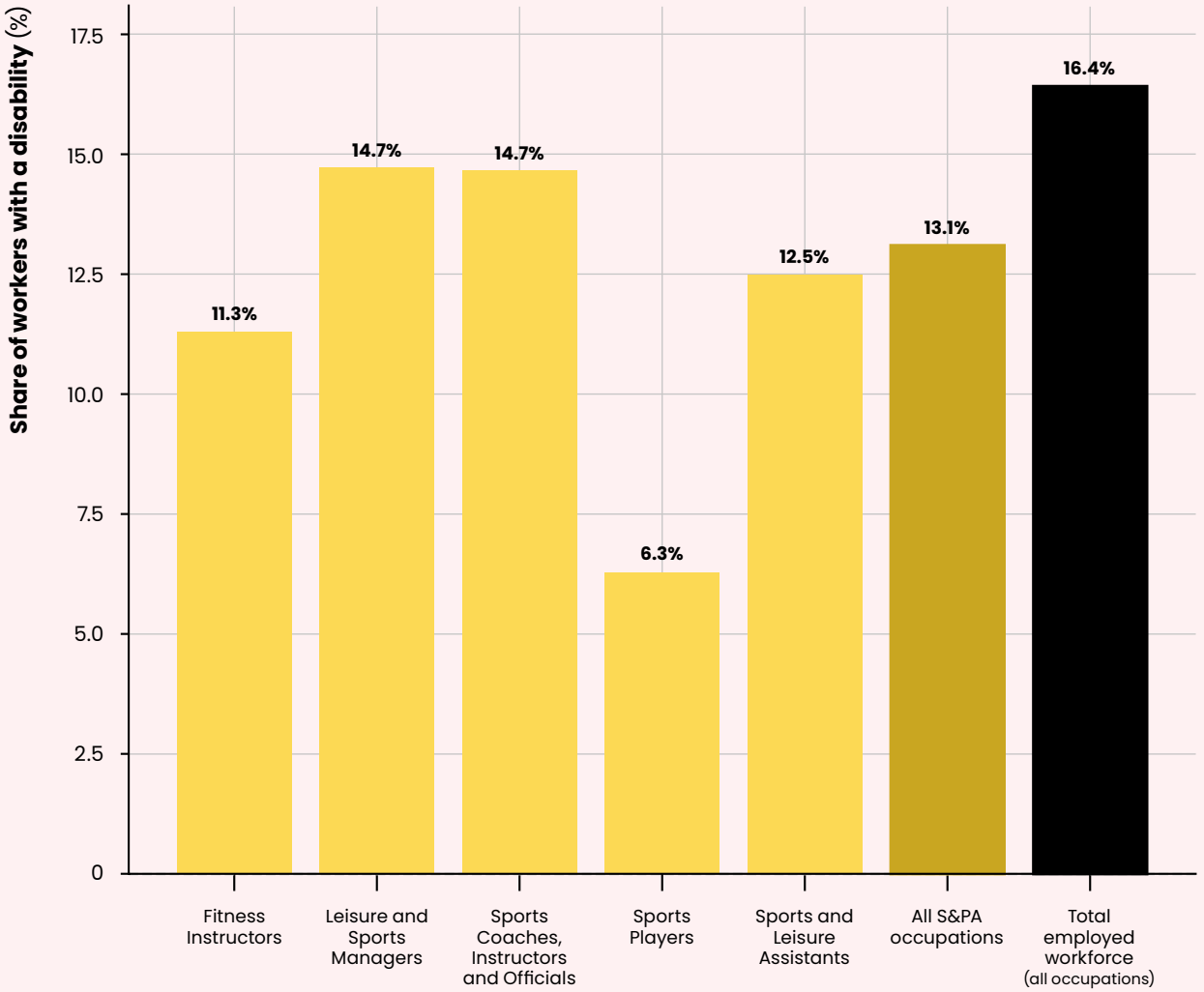
3.2 Disability

Similar to the analysis on gender and age, the analysis on disability is built using 12 quarters of LFS data. The data by disability records whether somebody considers themselves to be disabled under the Equality Act definition and it is worth noting that the definition of disability is both broad and subjective dependent on the respondent.

Overall, disabled people account for 13% of workers within the S&PA workforce. This is 20% lower than the overall workforce, with all S&PA occupations having a lower than the average (16%) share of disabled workers. Sports players in particular stand out for having the lowest share of disabled workers (only 6%). This could be reflective of the physical demands of these roles, but also of the significant barriers to inclusive opportunities in the sectors, such as lack of reasonable adjustments and the prohibitive costs of adapted sports equipment.

Prevalence of disability in S&PA occupations

UK | SOC4



Source: ONS, LFS (12 quarters of data pooled)

3.3 Socio-economic status

The analysis on socio-economic status is also built on 12 quarters of LFS data. In the LFS Survey, the data is categorised according to eight different categories based on the National Statistics Socio-Economic Classification (NS-SEC): higher managerial & professional, lower managerial & professional, intermediate occupations, small employers and own account workers, lower supervisory & technical, semi-routine occupations, routine occupations, and students, people who have never worked or are long term unemployed. Based on data availability, the two managerial categories have been aggregated.

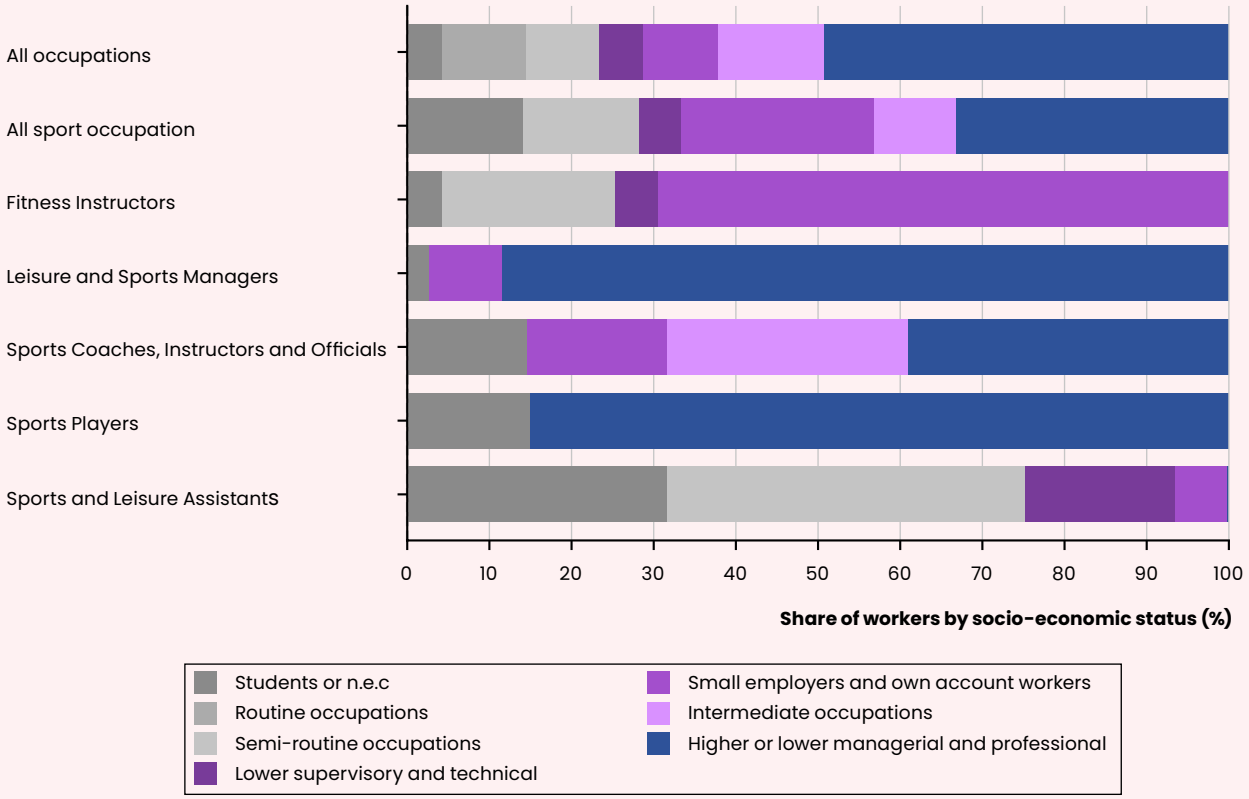
Compared to the wider workforce, the S&PA workforce has a higher proportion of workers in lower socio-economic groups (LSEGs). These, according to Sport England's definition, include NS-SEC categories six to nine, namely semi-routine occupations (such as bus drivers or hairdressers), routine occupations (such as cleaners or waiters) and students, people who have never worked or are long term unemployed. In particular, S&PA occupations, and especially sport and leisure assistants, have a higher proportion of workers in the students, never worked, or long-term unemployment category (14% S&PA workforce compared to the workforce-wide 4%) and in semi-routine occupations (14% v 9%). However, it is also worth noting that no worker within S&PA occupations falls within the routine occupations category.

S&PA occupations also have a higher proportion of small employers and own account workers (23% v 9% workforce-wide). This is particularly driven by fitness instructors: 69% of workers in this occupation fall within this socio-economic group, due to the large prevalence of freelancers in this field.

In contrast, S&PA occupations have a lower than the average share of workers in the managerial and professional socio-economic groups (33% v 49% workforce-wide). The exceptions to this trend are leisure and sport managers and sport players, with 88% and 85% of workers respectively belonging to this socio-economic category.

Socio-economic status

UK | S&PA occupations | SOC4



Source: ONS, LFS (12 quarters of data pooled)

3.4 Culturally diverse communities

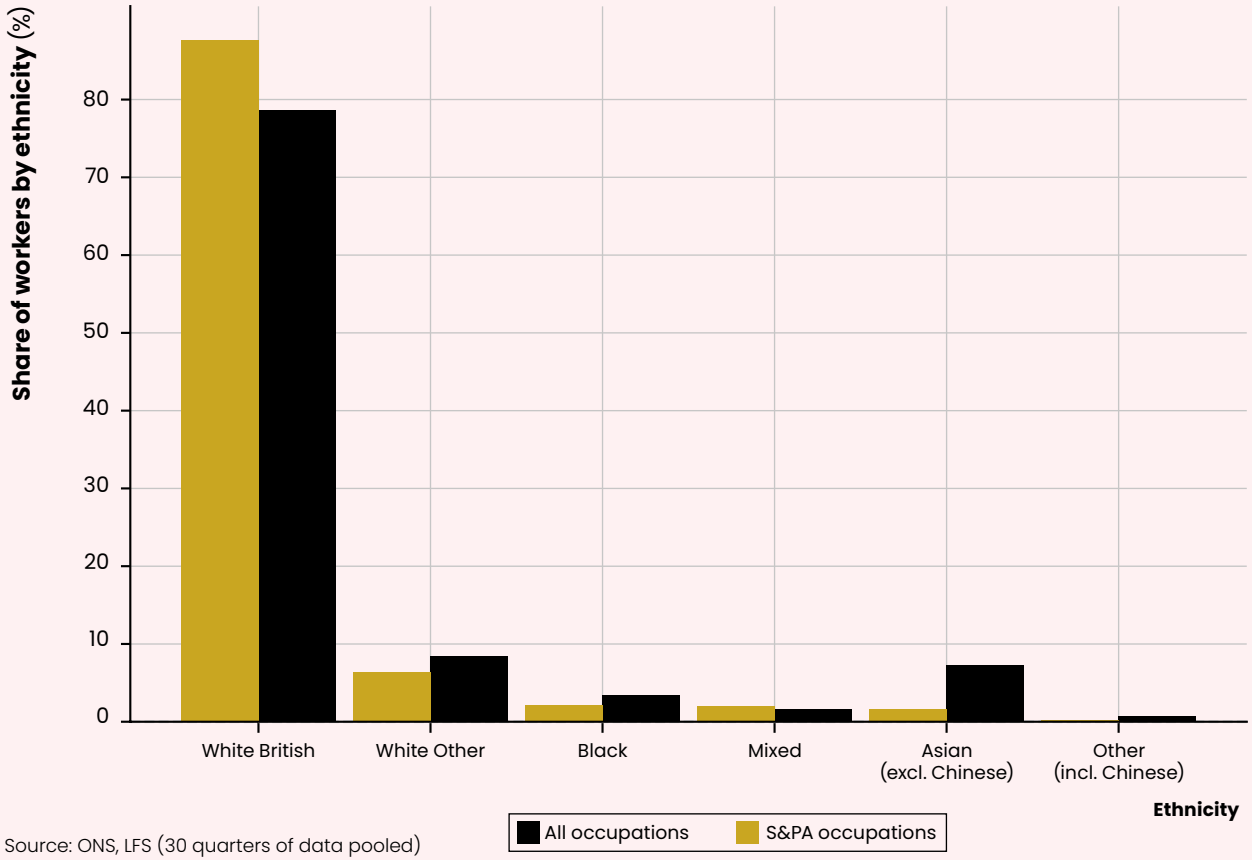
Due to the small size of S&PA occupations, it was necessary to combine 30 quarters of LFS data (approximately 7.5 years) to produce a robust cultural diversity/ethnicity analysis for S&PA occupations. This gives the opportunity to gain unique insights into the ethnicity background of the S&PA workforce while waiting for a more granular and comprehensive picture of the workforce when Census 2021 data will be released. However, this approach comes at the expense of being able to track any meaningful change over time, which will only be possible with Census data.

To ensure maximum granularity of insights within the limitations of the LFS data, the analysis in this section is presented in two ways. Firstly, the analysis is presented for all S&PA occupations in aggregate with a more granular split of ethnic groups, namely: White British, White Other, Asian (exc. Chinese), Black, Mixed and Other (inc. Chinese). The analysis then delves deeper into the specific S&PA occupations, this time grouping together different ethnic groups into White, Asian, Black and Others to ensure data robustness.

Overall, S&PA occupations are less diverse than the UK-wide workforce. More than eight in 10 workers in S&PA occupations are of White British ethnicity. This is 11% higher than the average for all occupations (approximately 9 percentage points difference). White Other and Black people are the second and third most represented groups within the S&PA workforce beyond White British. However, with the exception of White British and the Mixed ethnicity group, all other groups are underrepresented in S&PA occupations. The most underrepresented group is Asian (excluding Chinese): this group is 77% less likely to work in S&PA occupations compared to the average for all occupations.

Ethnicity among S&PA occupations

UK | SOC4

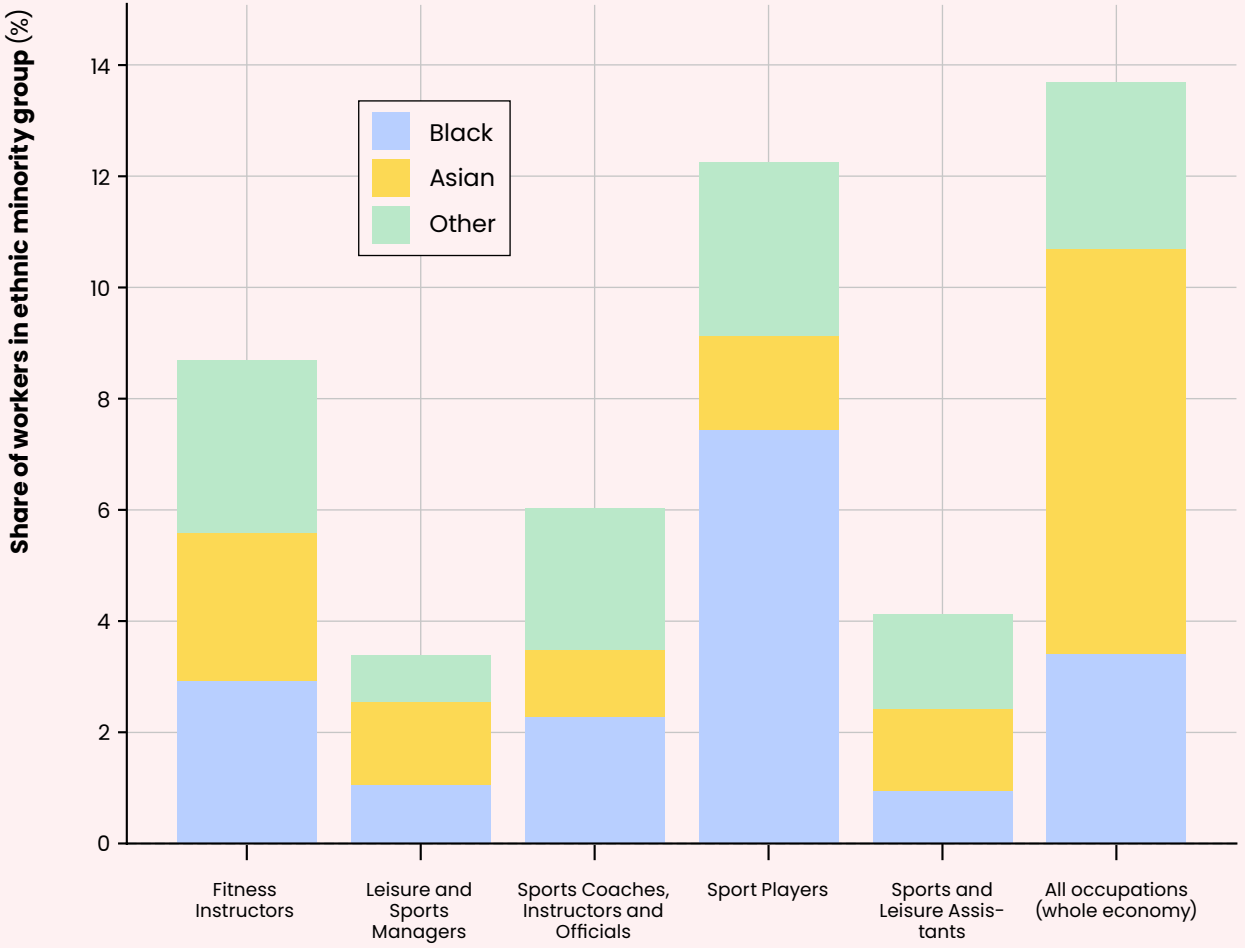


Source: ONS, LFS (30 quarters of data pooled)

Behind the overall trends for S&PA occupations in aggregate, there are some noticeable differences within S&PA occupations. With 12% of workers from black, Asian and other non-White groups, sport players are the most diverse S&PA occupation, only slightly below the UK–wide workforce average, followed by fitness instructors (9% non-White workforce). Sport players are 3.5 times more likely to be Black people than workers in S&PA occupations as a whole and twice as likely to be Black people than the wider UK workforce. Other backgrounds are also 1.4 times more represented within sport players than the S&PA workforce overall. In contrast, leisure and sport managers are the least diverse of all S&PA occupations, with 97% of their workforce being White, followed by sport and leisure assistants (96%).

Ethnic diversity of S&PA occupations

UK | SOC4



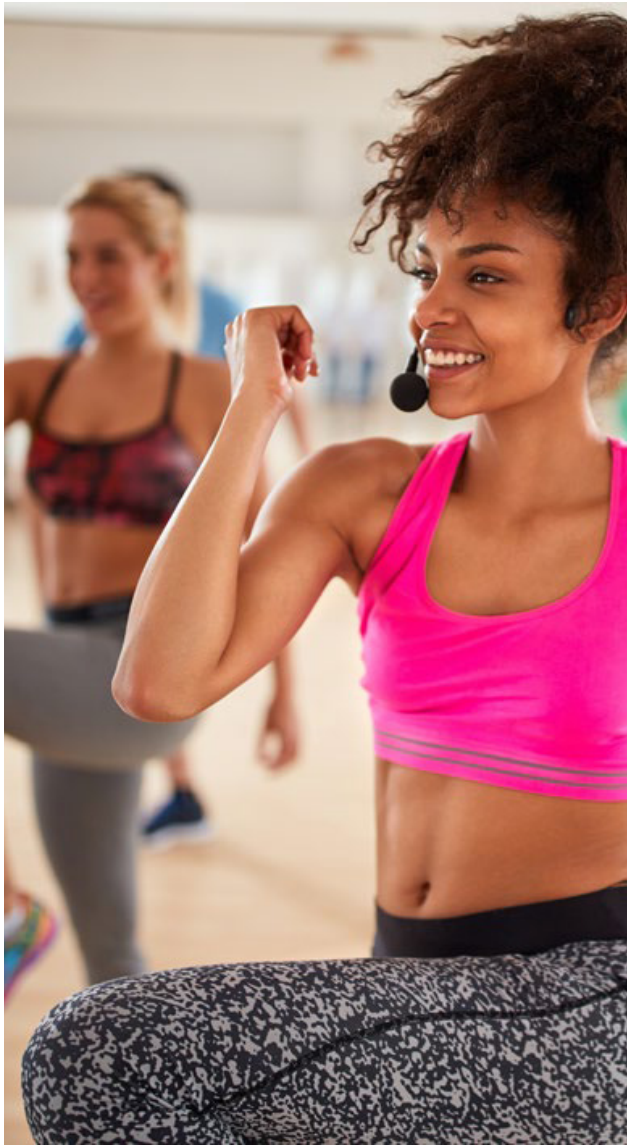
Source: ONS, LFS (12 quarters of data pooled)

CIMSPA

Chapter 4
Recruitment activity for the sport and physical activity occupations

Key insights

- **Hard hit by pandemic:** Given their client-facing nature, the recruitment activity for core S&PA occupations was disproportionately impacted during the COVID-19 pandemic over the course of 2020 and 2021. Relative to the average, recruitment activity for these roles fell further following the pandemic's initial onset in March 2020, and also took significantly longer to recover.
- **Strong recruitment recovery post-COVID:** Following the wide-scale reopening of the economy in mid-2021, recruitment activity surged across all S&PA occupations, as employers reopened for business. Relative to 2019 levels, demand increases were particularly sharp for sports coaches, and sport and leisure assistants.
- **Staff retention and recruitment challenge:** While recruitment activity was very high in 2022, this appears to be linked to labour market churn post-COVID, rather than jobs growth. This is visible across a number of key metrics, from the rise in the ratio of postings per job in the industry, to the increased posting duration and recruitment activity intensity, highlighting recruitment and retention challenges in the sector.
- **Tight labour market exacerbating the situation:** The S&PA occupations' younger, lower-paid, and predominantly part-time nature make it particularly susceptible to higher rates of labour churn, generally. However, these are likely to have been exacerbated by the UKs tight labour market post-COVID, in which companies compete intensely to attract workers and fill their vacancies. When staff are lost, this intense market competition for workers also makes re-hiring significantly more challenging.
- **Advertised salaries remain low but are rising:** Median advertised salaries for almost all S&PA occupations have grown closer to the average of all occupations, since 2019. However, in all cases advertised salary remains lower than the workforce average with its distribution being heavily concentrated at the lower end of the scale. This makes S&PA occupations less attractive than other roles, which, in turn, negatively affects the ability of the sector to attract and retain talent.
- **Lower barriers to entry:** While employers of core S&PA occupations may be struggling to retain staff, there are fewer barriers to entry into the sector for prospective workers, with S&PA roles typically specifying lower previous experience and educational requirements than other occupations generally. This presents an opportunity for the sector to attract talent.



Building on the earlier examination of the sport and physical activity (S&PA) workforce, Chapter 4 focuses on recent trends in its recruitment activity of core roles, with particular attention to the impact of the COVID-19 pandemic. In doing so, it provides an innovative perspective on recent developments in the S&PA professions as it is carried out using Lightcast's job postings data.

Job posting data complements official statistics by offering a unique and timely perspective of how the labour market and recruitment patterns have changed in the S&PA professions. Using this data, it is possible to uncover the most recent trends into how S&PA is continuing to evolve, capturing early insights on employers' needs, retention, and also what the workforce may look like in the future.

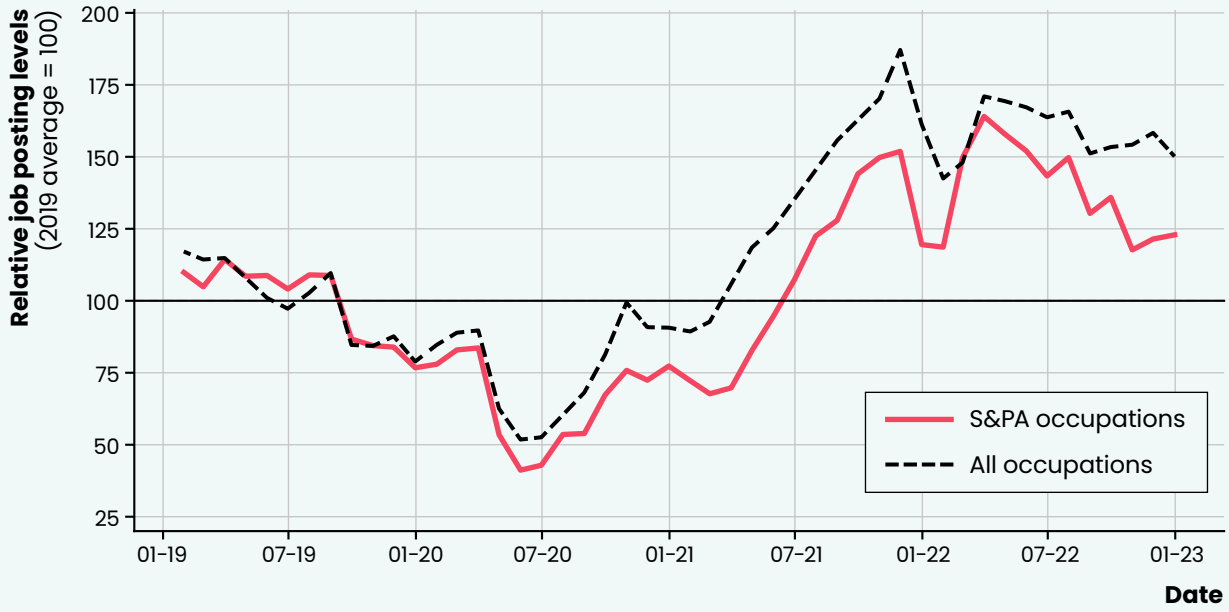
4.1 Trends in recent recruitment activity and the impact during the COVID-19 pandemic[31]

The COVID-19 pandemic, as shown in section 2.3, had a disproportionate impact on the S&PA workforce over the course of 2020 and 2021.

This adverse influence is also reflected in recruitment activity trends for the S&PA occupations. As shown in the figure, following the pandemic's onset, job posting numbers dropped sharply relative to average 2019 levels.

At its lowest (June, 2020), recruitment activity in S&PA occupations was down 57% compared to its pre-pandemic level, a larger drop than that seen by other occupations. On top of that, recruitment activity for S&PA roles took, on average, longer to return to its pre-pandemic level. For comparison, job posting levels for all occupations took approximately seven months to return to their immediate pre-pandemic March 2020 level, whereas the S&PA occupations took twice as long to recover. This shows the sustained impact public health restrictions had on curtailing the S&PA sector's economic activity, with businesses struggling to restart operations under even low-level restrictions, given the client facing nature of their work.

Job posting trends over time
2019-2022 | S&PA occupations

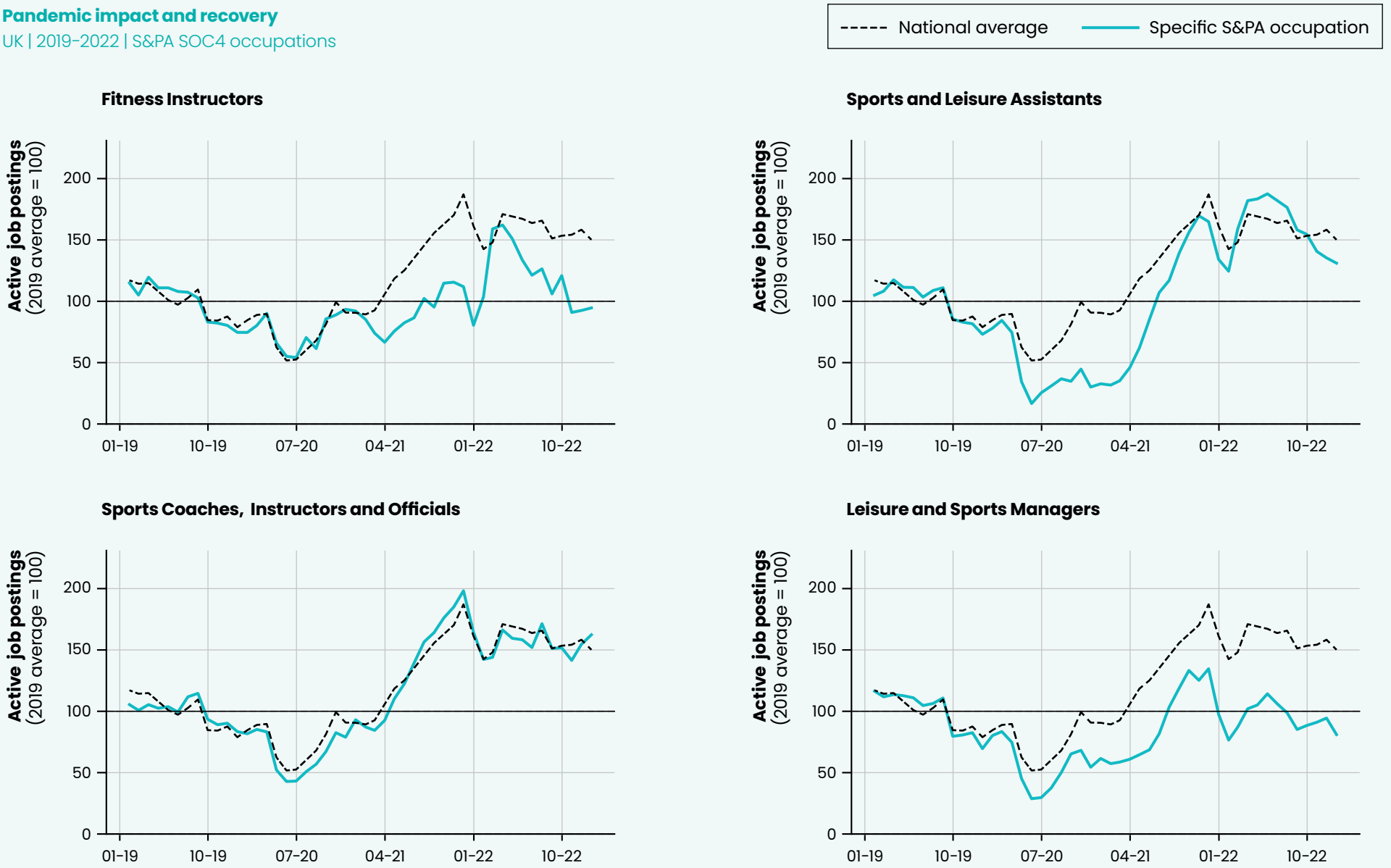


Source: Lightcast Job Postings

31 **Note:** There are no job postings for Sports Players, reflecting the unique nature of the labour market for this occupational group

Pandemic impact and recovery

UK | 2019-2022 | S&PA SOC4 occupations



Following the final phased lifting of restrictions, beginning in March 2021, recruitment activity began in earnest for the core S&PA occupations, as businesses restarted operations seeking to capitalise on pent-up consumer demand for their services. Over the course of 2021, demand for S&PA workers grew strongly, and by year-end was 50% above its 2019 average. Similar to the wider economy, these elevated levels of recruitment activity also persisted for much of 2022 only beginning to decline slightly in the latter half of the year.

To investigate these demand trends further, the charts on the previous page illustrate the recruitment activity of each of the specific S&PA occupations over time, thereby shedding further light on the specific impacts during the pandemic, as well as highlighting divergent trends during the latter stages of recovery.

Sport and leisure assistants for example, were the most negatively impacted in terms of recruitment during COVID-19 but saw a very sharp recovery upon full societal reopening. As of the end of 2022, recruitment for these roles, as well as for sports coaches, instructors and officials, was well above pre-pandemic levels.

In comparison, while fitness instructors and leisure and sports managers were also similarly impacted during the pandemic and saw a similar uptick upon reopening, recruitment activity for these roles trended back down to 2019 levels over the course of 2022.[32]

4.2 Breaking down S&PA demand

Building upon the trend analysis, this section digs deeper into specific breakdowns of the job postings for S&PA occupations in 2022, and how they compare to 2019, pre-COVID levels.

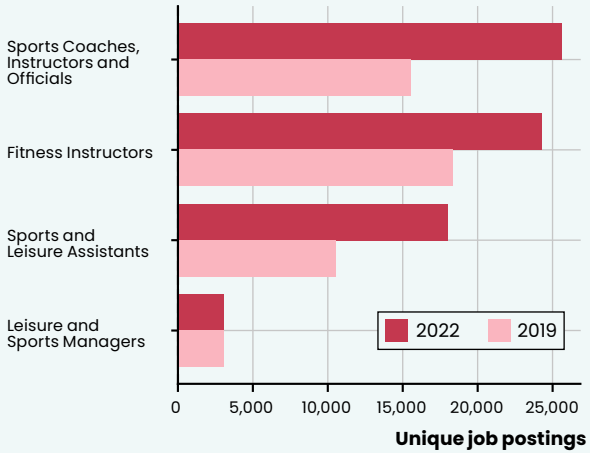
Overall, in 2022, 71,000 unique job postings were recorded for the S&PA occupations, an increase of 47% on the 2019 level. All S&PA occupations recorded more postings in 2022 than in 2019, indicative of a particularly active labour market. Relative to their 2019 levels, sport coaches, as well as sports and leisure assistants had the biggest increase in postings, growing 65% and 70%, respectively. To give more context to the recruitment of these roles, the bar charts overleaf show the top job titles recruited for each of these occupations in 2022, with titles typically closely aligned with role responsibilities.

The changed levels of occupational postings relative to 2019 mean the composition of overall S&PA role recruitment has also changed – as shown by the two pie charts. Sports coaches, instructors and officials have overtaken fitness instructors as being the most recruited for occupation, rising from almost 33% to 36%, while sports and leisure assistants have also seen their share grow three percentage points to more than 25% over the period.

However, differential growth rates in postings are not necessarily indicative of new job growth in the workforce. While additional jobs could certainly be a factor, it could also be that these occupational jobs have been more dynamic, with a higher rate of labour market churn (worker inflows and outflows). Examining whether or not this is indeed the case for S&PA occupations is the focus of section 4.3.

Strong recruitment activity post-COVID

UK | S&PA occupations | SOC4



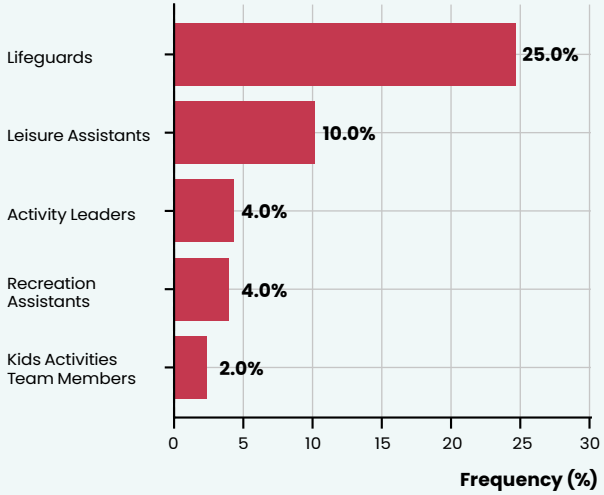
Source: Lightcast Job Postings

32 **Note:** When examining job postings, it is important to remember that these are distinct from actual 'job' numbers. Employers may be advertising because they are creating a new job, but it could also be (as is likely the case post-COVID-19) that they are advertising to replace someone who has recently left the company (labour market churn). Moreover, depending on the specific role, a single unique posting may relate to more than one job vacancy. A high level of postings therefore suggests that recruitment activity is particularly 'active' but it should not be considered a one-to-one relationship in terms of jobs

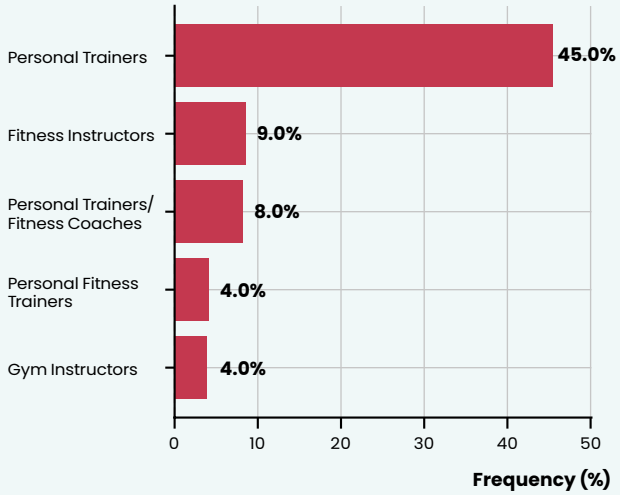
Top 5 job titles

UK | 2022 | S&PA SOC4 occupations

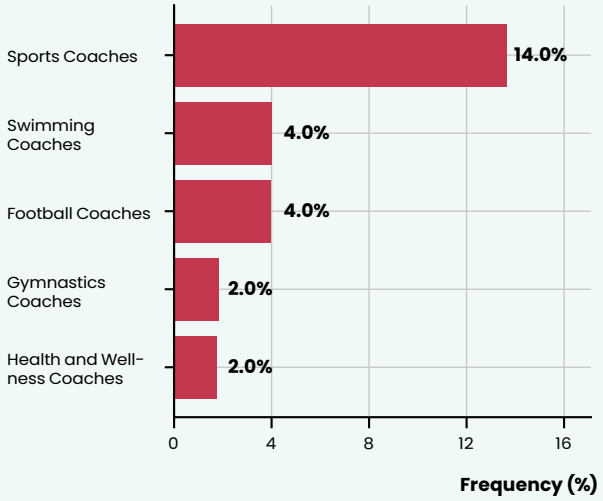
Sports and Leisure Assistants



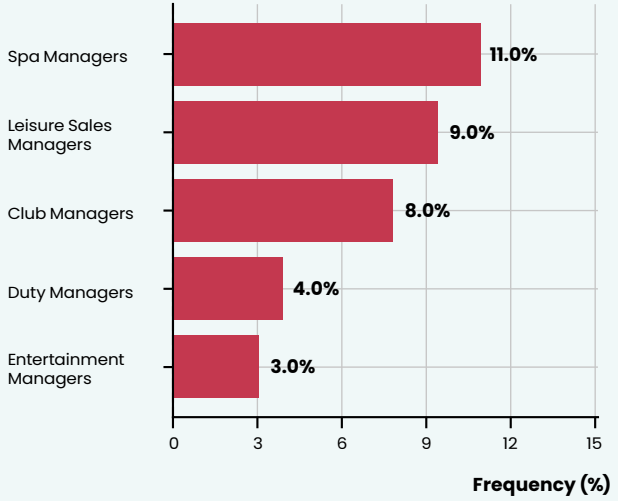
Fitness Instructors



Sports Coaches, Instructors and Officials

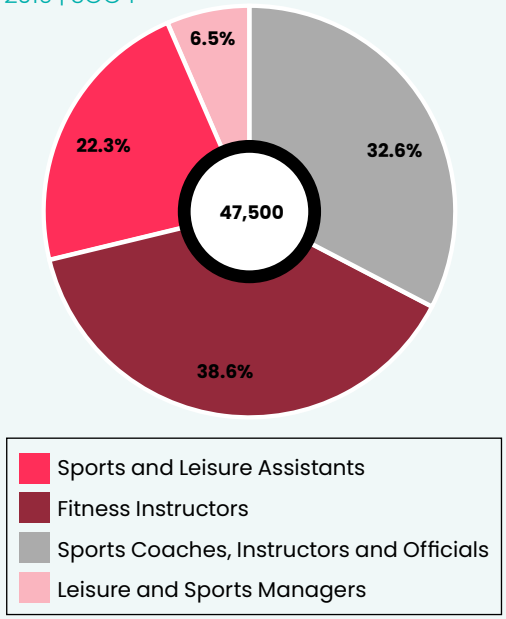


Leisure and Sports Managers



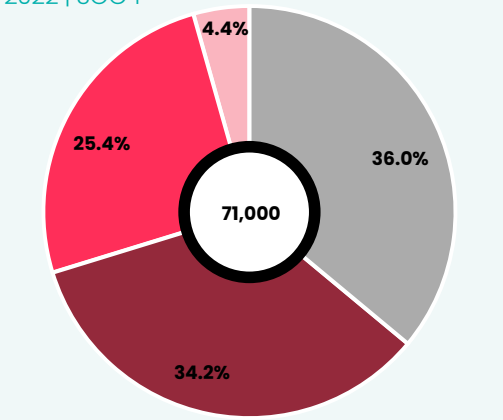
Recruitment activity composition

UK | 2019 | SOC4



Recruitment activity composition

UK | 2022 | SOC4



Source: Lightcast Job Postings

4.3 S&PA job retention challenges

Examining recent trends in key job posting metrics reveals strong evidence of retention and recruitment challenges facing S&PA employers, post-COVID.

Looking first at the jobs-to-job postings ratio shows that in 2022 there was a sharp increase in postings without a corresponding increase in official job numbers, compared to 2019. Similarly, latest official statistics suggest that there was also very limited growth in overall job numbers for S&PA occupations in 2022 relative to 2021. This would appear to suggest either that employers were having to recruit for the same/similar role multiple times (labour churn), or that, in a very tight and competitive labour market post-COVID they were struggling to fill vacancies and were forced to re-advertise roles without having successfully hired a candidate the first-time around.

Growth in the number of companies hiring, as well as a rise in median posting durations for all S&PA occupations and postings intensity, are also indicative of a tight labour market in which competition for worker talent is high. (See key job posting metric tables on page 50).

Understanding labour market dynamics

An important question to consider here is, *'what underlying factors have been driving this period of intense recruitment activity for S&PA professionals post-COVID-19?'*

While there are likely to be a number of explanatory factors at play, some fundamental reasons stand out.

Firstly, there have been higher rates of labour market churn and job changes post-COVID, right across the labour market.[33, 34] During the prolonged period of closure in 2020 and 2021, many employees, across sectors, changed or planned to change, from their pre-COVID employment situation.[35] Where workers did change during the height of the pandemic they may not necessarily have been replaced by businesses owing to the uncertain economic and public health outlook at the time. However, with a clearer outlook for the future and the phased reopening of businesses in mid-2021, these labour gaps were brought sharply into relief for employers. Moreover, the simultaneous increases in employer demand across sectors post-reopening made changing jobs much easier for many of those who had been planning to change jobs, further exacerbating labour market churn.

Furthermore, in times where there are plentiful opportunities for workers, as was the case post-COVID, workers have greater bargaining power and therefore have the ability to better choose their employment and negotiate better pay and conditions.[36] Increased labour market opportunities for workers can therefore further exacerbate labour market churn dynamics causing retention challenges for employers unable to match pay from elsewhere. This in turn leads to more frequent and costly recruitment burdens on employers without necessarily any increase in actual job numbers.

Increased labour market churn may have been particularly acute for S&PA given its youthful demographics (section 3.1) – young people are the most inclined to change jobs – and the high share of part-time workers who are typically more transient than full-time workers.[37] As such, staff retention during the periods of closure may have been a particular challenge for S&PA employers who subsequently had to recruit intensively during the initial phase of reopening to fill vacancies.

Overall, while retention and recruitment appears to have been a particular challenge for the employers of S&PA occupations post-COVID, UK benchmark figures for all occupations suggest that this has also been a major challenge for other areas of the economy. This is shown by the increased job posting to jobs ratio, higher number of recruiting employers, and longer posting durations in the tables on page 50.

33 More UK employees are leaving their jobs than ever before (McKinsey & Co., 2022)

34 Proportion of employees making job-to-job moves in the UK (Statistica, 2023)

35 'The Great Resignation': almost one in four UK workers planning job change (Guardian, 2021)

36 Job changers and stayers, understanding earnings, UK: April 2012 to April 2021 (ONS, 2022)

37 Analysis of job changers and stayers (ONS, 2019)

Case study

CIMSPA Retrain to Retain programme

The ReTrain to ReTain programme was a £5 million job retention and support package that ran from November 2021 through to March 2023.

The programme was funded by Sport England through the National Lottery and delivered by CIMSPA alongside a consortium of partners including UK Coaching and EMD UK.

It was designed to support up to 25,000 sports and fitness coaches who have had to find work outside the sector during the coronavirus pandemic, prioritising those living and working in areas of economic deprivation or supporting under-represented groups.

This project report demonstrates the powerful impact that the ReTrain to ReTain programme had on the sport and physical activity sector and its workforce as it recovered from the COVID-19 pandemic.

Find out more here

ReTrain To ReTain

CIMSPA

THE NATIONAL LOTTERY

SPORT ENGLAND

UK COACHING

emd UK
the national governing body for group exercise

Median advertised salaries[38, 39]

Considering median advertised salaries for these occupations in the tables shows that for all occupations (with the exception of leisure and sport managers) salaries have grown relative to 2019 levels. The largest increases were for those occupations with the highest number of postings, sport coaches and sport and leisure assistants, which grew by +£900 (4%) and +£2,800 (16%), respectively).[40, 41] However, while there has been growth, compared to the UK occupational advertised salary average benchmark, all S&PA occupations remain lower.

It is possible that, consistent with a tight and dynamic labour market, advertised salaries may be rising due to heated competition among employers for workers, with potential employees demanding higher wages to move, particularly in the context of the ongoing cost-of-living crisis. Recent changes in minimum wage levels are also likely to be an important factor behind increases in advertised salaries.

38 **Note:** 25% of all S&PA job postings in 2022 contained salary information, however, the frequency was not evenly distributed. Only 14% of postings for fitness instructors contained salary information, while the prevalence in other S&PA occupations was between 28%-31%. For comparison, the UK occupational average benchmark is 33%. Given the lower-than-average prevalence of advertised salaries, caution is advised when interpreting figures

39 **Note:** Median advertised occupational salaries and industry earnings per worker (EPW) presented earlier in Chapter 2, are not directly comparable metrics

40 **Note:** While median advertised salaries are higher (or similar) for each S&PA occupation, the change in composition of overall job postings means that median advertised earnings for these occupations as a whole has actually declined

41 These figures represent full time equivalent salaries and, therefore, are likely to be lower in reality if the role is part-time

42 **Note:** Job Posting to Jobs Ratio excludes freelance job estimates

Key S&PA job posting metrics – 2019 vs 2022[42]

2019

SOC4 Occupations	Unique postings	Job Posting-Jobs Ratio	Posting intensity	Unique companies	Median posting duration (days)	Median advertised salary (£)
Leisure and Sports Managers	3,100 (6.5%)	0.05	1.99	732	28	£27,460
Sports and Leisure Assistants	10,580 (22.3%)	0.15	2.49	1,489	25	£18,110
Sports Coaches, Instructors and Officials	15,510 (32.6%)	0.18	2.03	2,247	24	£25,150
Fitness Instructors	18,340 (38.6%)	0.56	2.97	1,124	25	£25,020
All S&PA occupations	47,530	0.17	2.49	4,459	25	£24,770
Total UK postings (all occupations)	8,333,100	0.26	2.65	128,147	27	£30,020

2022

SOC4 Occupations	Unique postings	Job Posting-Jobs Ratio	Posting intensity	Unique companies	Median posting duration (days)	Median advertised salary (£)
Leisure and Sports Managers	3,120 (4.4%)	0.05	1.88	786	31	£27,460
Sports and Leisure Assistants	18,000 (25.4%)	0.26	2.44	1,835	30	£20,930
Sports Coaches, Instructors and Officials	25,570 (36.0%)	0.29	2.07	3,529	32	£26,050
Fitness Instructors	24,280 (34.2%)	0.74	3.44	1,464	31	£25,790
All S&PA occupations	70,970	0.27	2.62	5,394	31	£23,870
Total UK postings (all occupations)	13,920,050	0.44	2.46	192,401	31	£30,910

Source: Lightcast Job Postings

Furthering the analysis of advertised salaries, the figure illustrates the distribution of median advertised salaries from job postings for all S&PA in 2022, compared to 2019 and the 2022 average of all occupations. It shows that advertised salaries in S&PA occupations tend to have a narrower distribution than the average of all occupations, with the distribution heavily concentrated towards the lower end of the salary scale. This narrow shape suggests therefore, that there are relatively few roles advertising higher salaries. While the peak concentration in median advertised salaries has increased relative to 2019, this change is most likely to be largely driven by recent changes in minimum and living wage rates.

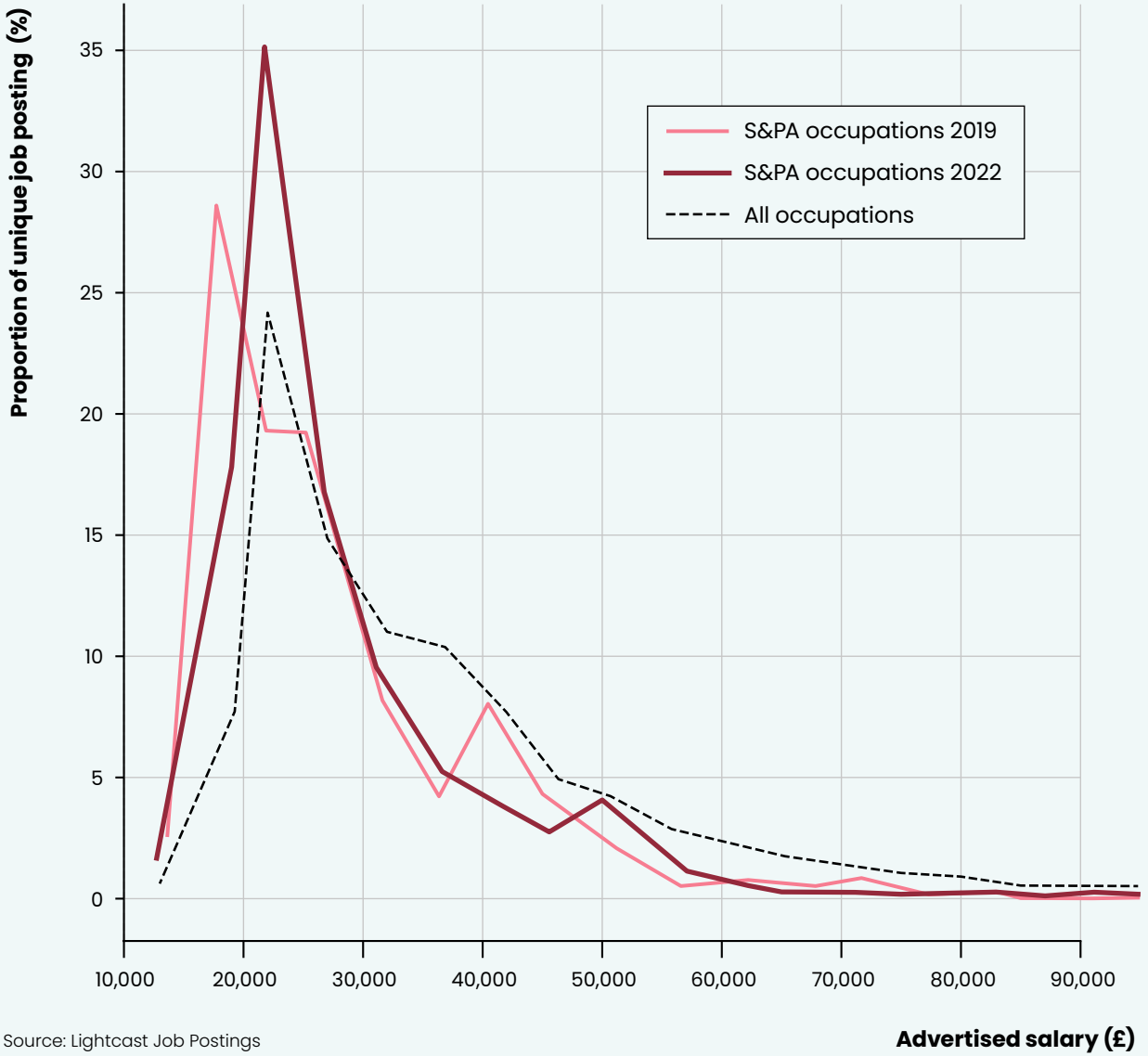
Employer perspective
Wages as a factor in staff retention challenge

Rhys Jones, CEO Plymouth Active Leisure:

Pay is a big issue; I've had to significantly raise wages and do job evaluations. The national minimum wage (NMW) rises really squeeze scales and income is not rising at the same rates. Entry level and manager pay is closer than ever and talented middle managers are the ones we lose to other industries. Innovative products and new ways of working are needed, and of course energy prices to drastically reduce. I need coaches, swim teachers, gymnastics and trampolining – it is very difficult to find them or people to train up.

Advertised salary distribution

UK | 2019 vs 2022 | S&PA occupations | SOC4



Source: Lightcast Job Postings

A company classification of recent recruitment activity[43]

Using the alternative S&PA company definition proposed by The Data City to analyse trends in S&PA job postings over the course of the pandemic reveals generally similar results as the SOC classification. The recruitment activity of these companies was more adversely affected by COVID-19 initially, and they subsequently took longer to recover than other areas of the economy. While recruitment surged upon economic reopening in mid-2021, by the end of 2022, recruitment had subsided back to average pre-pandemic levels.

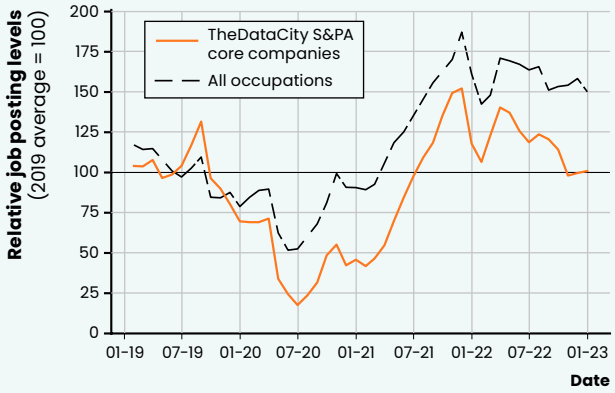
Among the top recruiting S&PA companies in 2022 were Nuffield Health, The Bannatyne Group, and The Gym Group. The occupation most recruited for by S&PA companies over the course of 2022 was fitness instructors (8.8%), followed by a host of other frontline occupations, such as kitchen and catering assistants, sport and leisure assistant, sport coaches, receptionists, and physiotherapists.

Examining recruitment activity across CIMSPA's core S&PA industries, shows that companies within the exercise and fitness, as well as leisure operation sector were the two largest at most active in 2022, recording 20,600 and 16,600 unique job postings respectively.

In terms of the median advertised salaries of postings related to these core sectors, the community sport sector is highest at £27,970. Given that this sector relies heavily on volunteers for the provision of its services, these higher salaries likely relate to the recruitment of more managerial positions within the sector.

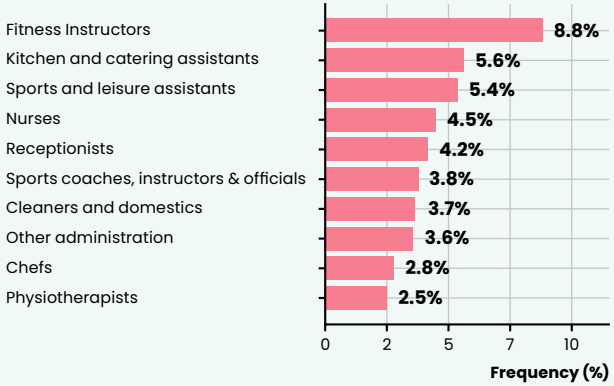
Job posting trends over time

UK | 2019-2022 | TheDataCity S&PA companies



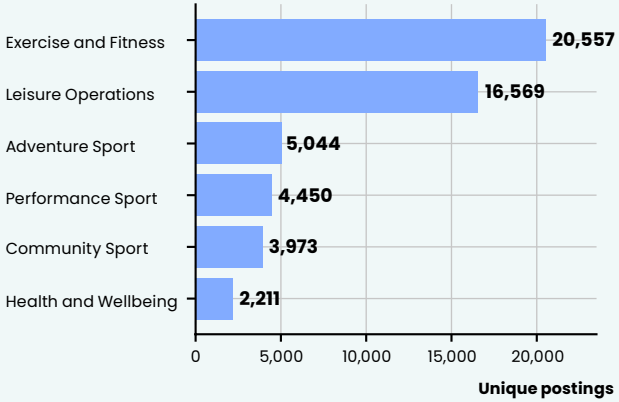
Top occupations recruited for in S&PA companies

UK | 2022 | TheDataCity S&PA companies | SOC4



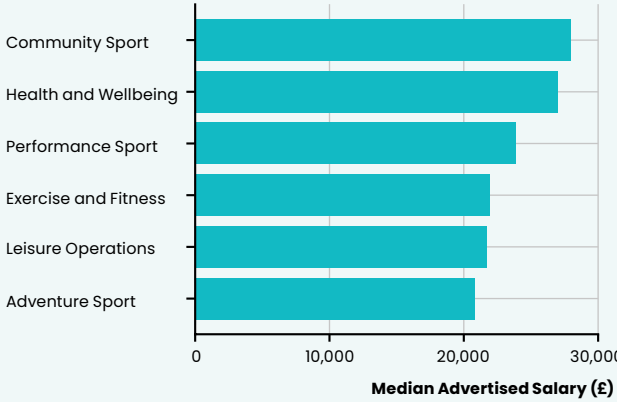
Recent recruitment activity

UK | 2022 | TheDataCity S&PA companies



Median advertised salary

UK | 2022 | TheDataCity S&PA companies



Source: Lightcast and TheDataCity

43 **Note:** Some companies can be classified as being part of a number of the sport and physical activity industries and, therefore, the cumulative job posting number for all sport core-industries exceeds the total for The Data City definition. Figures do not include postings from staffing/recruitment companies

4.4 Barriers to entry

Minimum years of experience

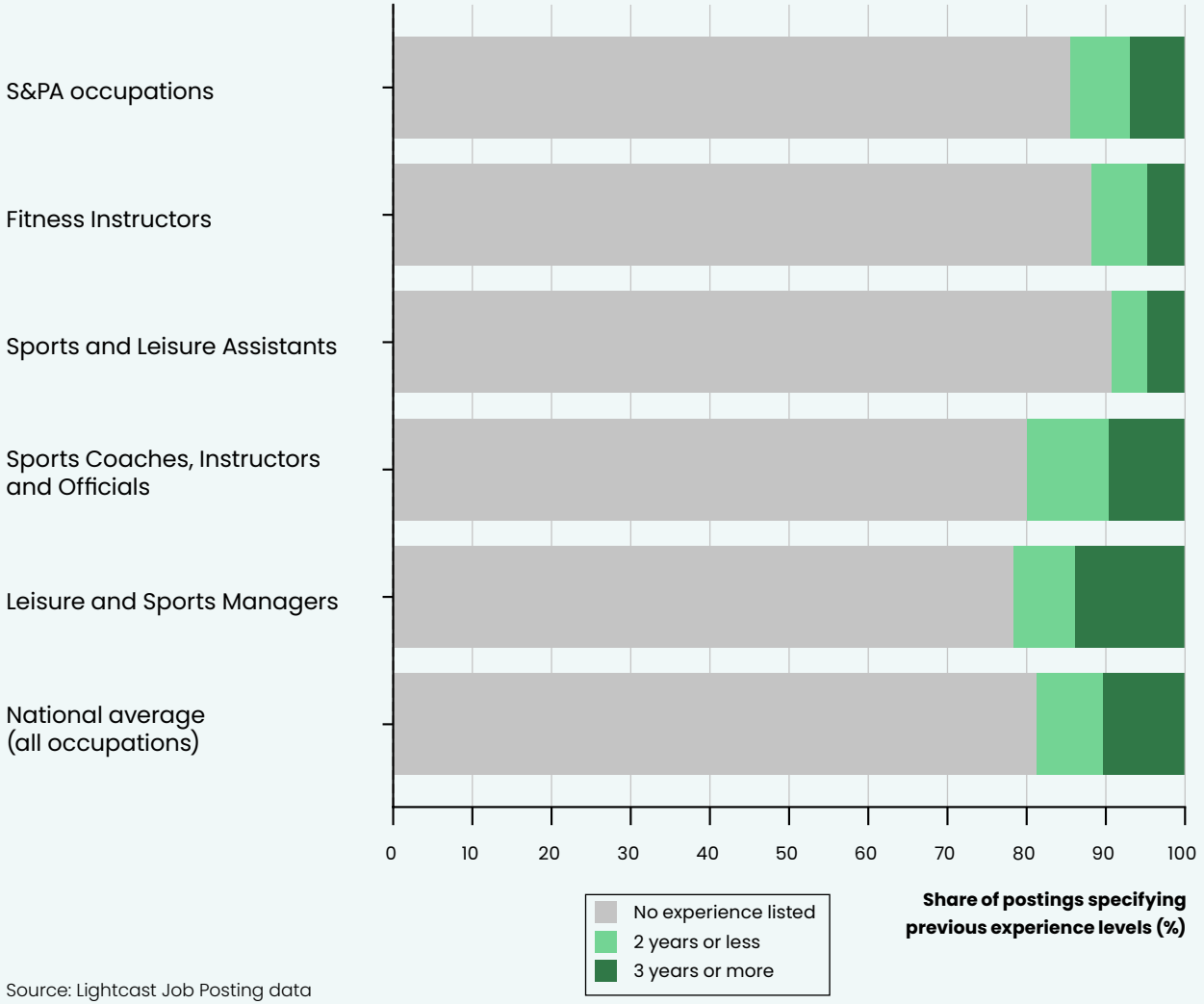
Minimum years of experience is a useful metric from which to assess the S&PA sector in terms of ease of entry.

In 2022, just 15% of job postings related to the S&PA occupations required a minimum level of experience, compared to 19% for all occupations. Among the S&PA occupations, previous experience is more likely to be specified among leisure and sports managers (22%), as well as sports coaches, instructors, and officials (20%). Where previous minimum levels of experience are specified, leisure and sports managers are the most likely to require 3 years or more experience.

These findings suggest that, where experience requirements are specified, the length is typically shorter than for all occupations, and as such, minimum experience requirements represent less of a barrier to entry into these occupations than other roles.

Minimum years of experience required

UK | 2022 | S&PA occupations



Source: Lightcast Job Posting data

Minimum education levels

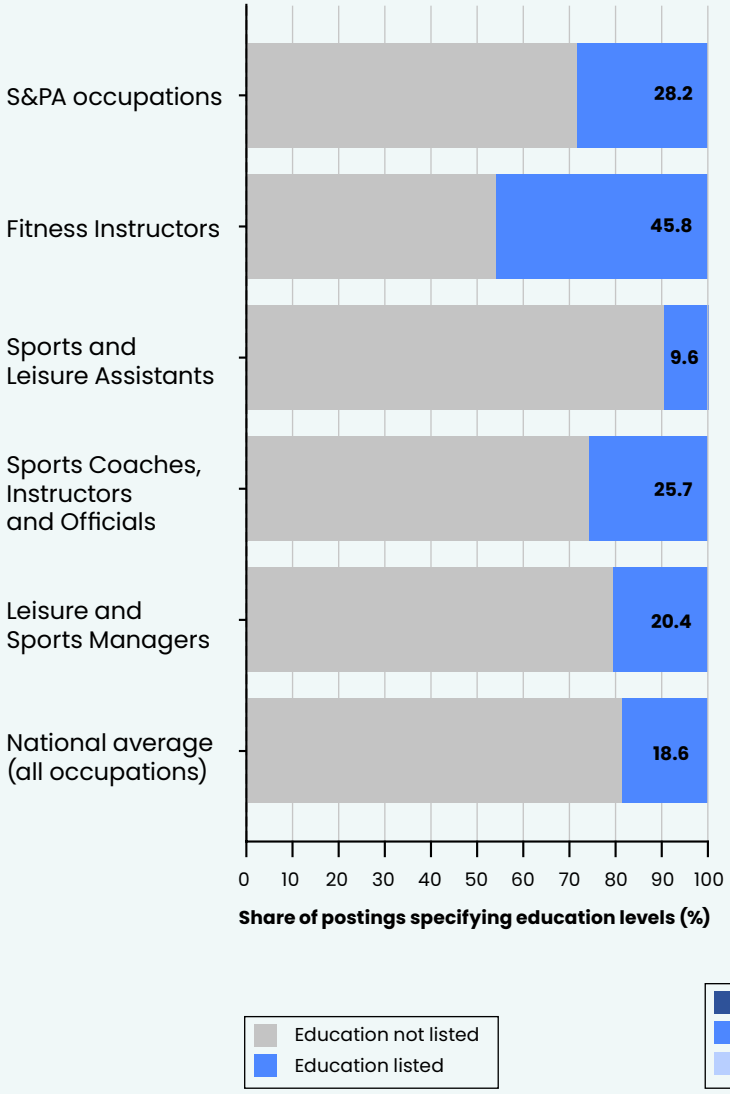
Beyond experience, minimum education levels required by employers is another useful indicator to consider in terms of barriers to entry. For entry into some occupations, having a recognised educational achievement or certification (particularly higher level) is a necessary prerequisite. From an employer's perspective, they commonly represent a proxy benchmark from which to measure a candidate's competence or base expertise in a given field.

In 2022, just over 28% of S&PA occupation job postings specified minimum educational requirements, higher than the average for all occupations (18.6%). However, looking at where education does feature for S&PA roles, it tends to be around GCSEs and A-level equivalents with only 20% of relevant postings seeking a Bachelor's degree or higher. In contrast, the average of all occupations places a much greater emphasis on a higher-level degree (59%). This suggests that minimum education levels do not represent a significant barrier to entry into S&PA roles.

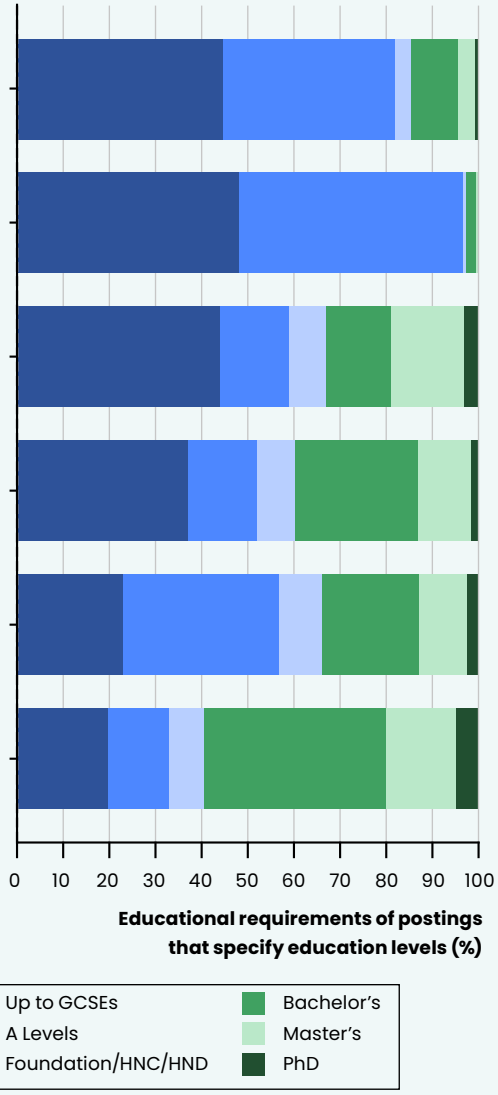
While some employers of S&PA occupations do specify minimum experience and education levels in their job postings, they are typically in the minority. This is reflective of how employers are beginning to move away from these traditional hiring criteria and are increasingly concerned with employing candidates with the right skill sets.

Exploring the necessary skill sets for a career in S&PA occupations will be the focus of Chapter 5.

Education levels
UK | 2022 | S&PA occupations



Where education level specified
UK | 2022 | S&PA occupations



Source: Lightcast Job Posting data

Case study

CIMSPA professional recognitions and other fitness certifications

Beyond, standard educational requirements there are also a host of S&PA sector specific professional recognitions that are sought after by employers. Relative to 2019, the share of S&PA job postings specifying these sector specific professional recognitions has grown strongly (approximately 128%), from 4.3% to 9.9%.

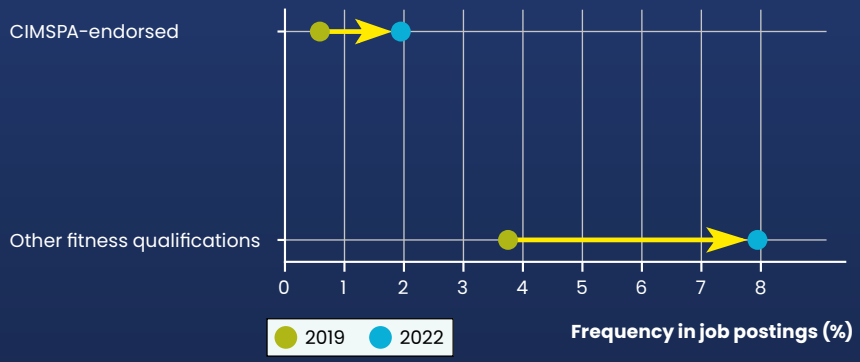
Particularly sharp growth has been seen among job postings specifically referencing professional recognitions with CIMSPA. Postings including these professional recognitions accounted for 2% of all S&PA occupation postings in 2022, compared to less than 0.6% in 2019. This suggests a growing recognition of the organisation among employers in the sector. The top job titles, requiring CIMSPA endorsed professional recognitions job postings are fitness instructors, personal trainers and other instructors.

Other fitness-related qualifications have also seen a sharp rise in demand over recent years with 'personal trainer certification' among the largest.

The growing demand for recognised industry and affiliate memberships overall reflects a sector and occupational group that is becoming increasingly professionalised.

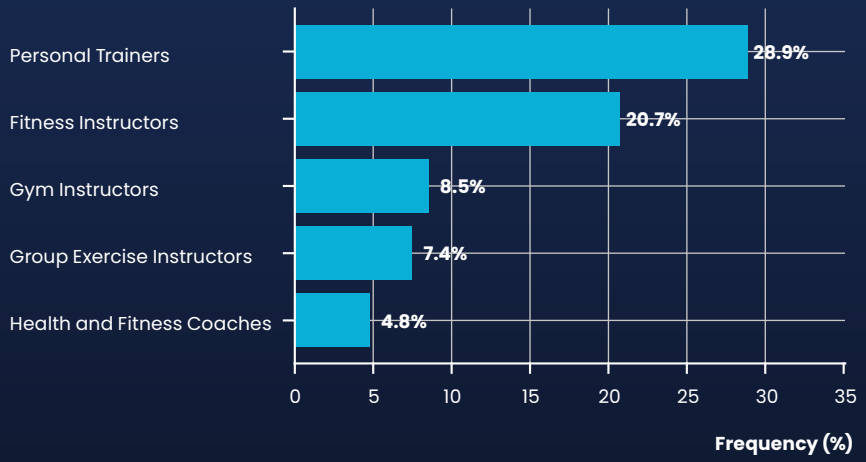
Growing demand in fitness certifications and CIMSPA accreditations

UK | 2019 vs 2022 | S&PA SOC4 occupations



Top 5 job titles

UK | 2022 | CIMSPA accreditation



Source: Lightcast Job Posting data

CIMSPA

Chapter 5
Skills of the sport and physical activity workforce

Key insights

- **Transferable skills are critical:** Each of the core S&PA occupations are more skewed towards transferable skills – such as, customer service, communication, and professionalism – than the national average of all occupations. This is indicative of the largely people-oriented nature of these roles.
- **Different jobs need different skills:** Each of the core S&PA occupations has its own unique composition in terms of skill requirements as specified by employers, reflecting the distinct roles and responsibilities of each.
- **Changing skills composition:** This is further backed up through CIMSPA's work to date in establishing local skills hubs and engaging with over 300 employers. Transferrable skills are in much greater demand since the pandemic with customer service, community engagement and engaging with the inactive listed as the top 3 skill priorities for the workforce.
- **Defining skills for S&PA:** Across the S&PA occupations, eight skill areas were identified as being defining. These include, general instructing ability, first aid, lifeguarding, sport specific coaching, knowledge of sport disciplines, physiological knowledge, fitness professional recognitions, and working with children and other vulnerable participants. Considered together, 62% of all S&PA job postings in 2022 contained at least one of these 'defining' skills, compared to 9% for all occupations. Different combinations of these skills vary in importance for the different S&PA occupations.
- **Growing skill diversity:** The number of different skills sought by employers has grown over time, with employers seeking a wider range of skills for all S&PA occupations in 2022 than was the case before the pandemic.
- **Changing skills mix:** Compared to 2019, there has been growth in demand for a broad range of skill areas, such as education and training, ICT, and customer facing skills, with employers specifying specialised sport skills proportionately less. In the context of the retention and recruitment challenge facing the sector, this may be the result of S&PA employers expanding their search by placing greater emphasis on the importance of more general skills.
- **Career pathways for S&PA professionals:** Many of the defining skills for S&PA can also be found elsewhere in the wider workforce (particularly among teaching, healthcare, and other service sector roles). By identifying 'feeder'/entry roles into the S&PA occupations – roles that already possess many of the most important skills to succeed in S&PA positions – as well as 'next step' progression roles for those already in the workforce, skill similarity models identify clear career pathways for the sector. These can help address ongoing recruitment and retention challenges, particularly over the longer run.

Skills are the essential building blocks of every job. In most cases, they are the defining characteristics that distinguish a role from others in the workforce. However, skills are not static. In an ever-changing economy, the necessary skills required for job roles are constantly evolving, even if the job title – and the worker – remains the same. For the sports and physical activity sector (S&PA), this is no different.

Therefore, the objective of this chapter is to determine what specific skills and skill areas are most sought after by employers of S&PA occupations in 2022, based on the information extracted from 71,000 job postings. The research will then further this analysis by assessing how demand for skills has changed relative to equivalent 2019 levels.

The analysis presented in this chapter is based on Lightcast's proprietary data on job postings, combined with Lightcast Skills Taxonomy. Lightcast Skills Taxonomy includes over 32,000 different skills, helping identify the specific requirements of recruiting employers, with relevant implications for policymakers and education providers.[44]

44 **Note:** Link to Lightcast's Open Skills Taxonomy. This includes an interactive version of Lightcast's hierarchical skills taxonomy, providing a full list of the skill subcategories and specialised skills within each of its 31 skill category groups

5.1 What do the S&PA occupations look like in terms of skills?

Skill types

Lightcast's Open Skills Taxonomy, classifies the skills required by employers in job postings as being one of three types:

1. **Common** – these are typically transferable skills prevalent across many different industries and include personal attributes, behaviours, competencies, and learned skills.
2. **Specialised** – these are skills unique to a task or ones that are primarily sought after within a subset of occupations.
3. **Software** – a subset of specialised skills, these include specific computer programs and programming skills requested in job postings.

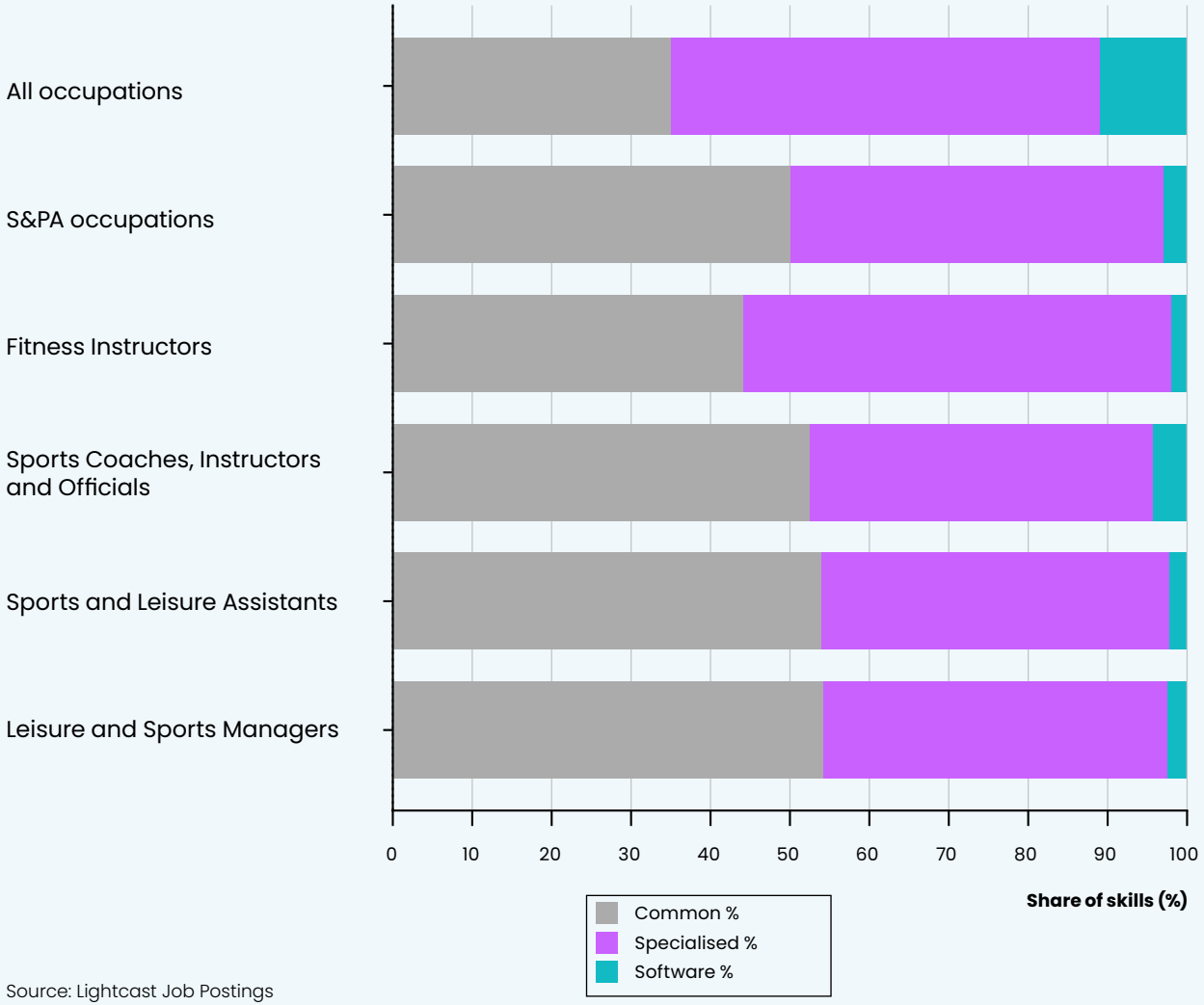
As shown in the figure, approximately 50% of all skills mentioned in S&PA job postings in 2022 were transferable skills. Relative to the national average for all occupations (40%) this is a significantly larger share. The importance of transferable skills – such as communication, customer service, management and professionalism – which are shared by all the S&PA occupations is in line with the largely people-oriented nature of these roles.

Alongside transferable skills, specialised skills are also important in S&PA occupations, while, in contrast, software skills feature much less frequently in S&PA job postings. While this does not mean that software skills are unimportant for these roles, it does suggest that they are less critical to these positions from an employer's perspective than is the case for other occupations (software skills are explored further in Case Study later in this chapter).

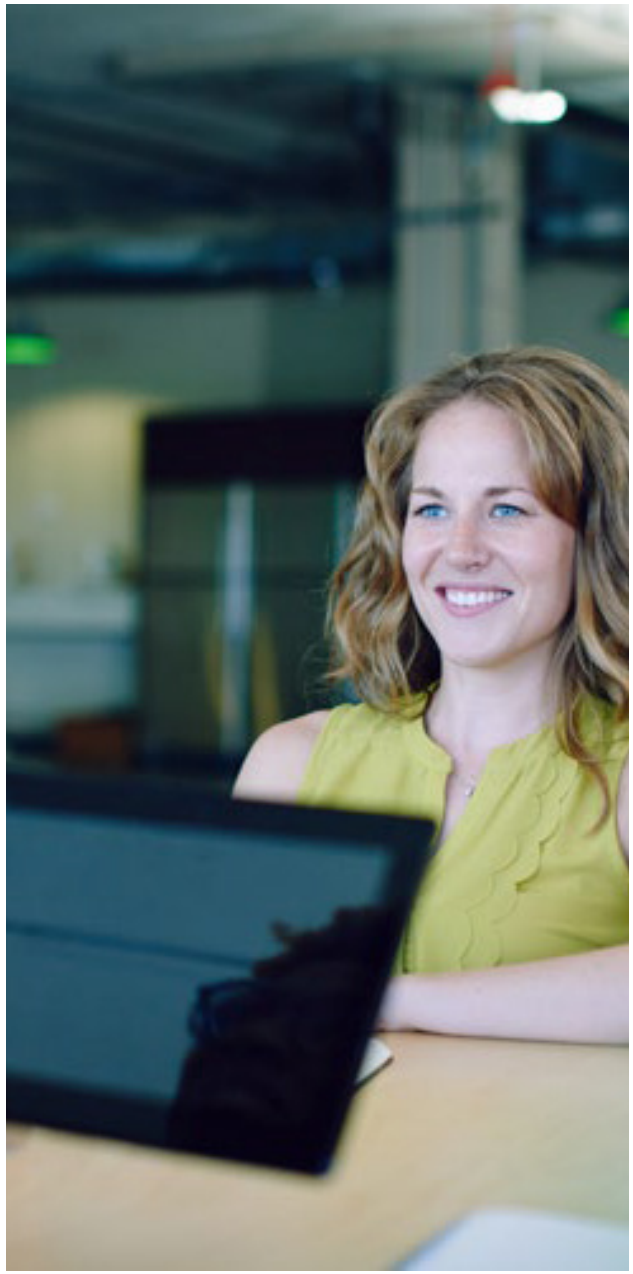
Comparing the skill distribution of each of the core S&PA occupations shows very similar compositions with all having a higher-than-average concentration of transferable skills, although fitness instructors do have a higher requirement for specialised skills.

Distribution of skills by type

UK | 2022 | S&PA SOC4 occupations



Source: Lightcast Job Postings



Top skill categories and specific skills

Digging deeper into the skill areas most in demand among employers recruiting for S&PA roles shows the wide-ranging variety of skills and attributes typically required for workers to succeed in their roles. This is illustrated in the figure overleaf which plots the frequency with which skills from within each of Lightcast's 32 broad skills categories are mentioned by employers in job postings for S&PA occupations, and in the recruitment market overall.

A predominantly unique area to S&PA roles are skills from the performing arts, sports, and recreation skill category. These are specialised skills which, according to Lightcast's Skill Taxonomy, are unique to performing arts, sport and recreation-related roles, such as sports coaching and athletic training as well as sports knowledge and performance art/dance. Specific skills from this group are cited in almost 32% of all S&PA job postings compared with 0.8% of all postings. That said, their importance varies across the S&PA occupations, with fitness instructors and sports coaches, instructors and officials having particularly high concentrations, 46% and 33% respectively. This suggests that these skills are particularly defining for these occupations. In contrast, the broader leisure and sport roles (managers and assistants) have a lower concentration of skills from this group, although still well above the wider occupational average.

Other skill groups are also very important to the S&PA occupations. Transferable skills linked to specific physical and inherent abilities, and good customer service, are frequently in high demand across the S&PA occupations, for example. Moreover, each S&PA occupation shows peaks in skills requirements for categories aligned with their own typical role duties. Education and training expertise is often sought after for fitness instructors and sport coaches, positions which require an ability to teach participants and instruct effectively. Similarly, business skills too are also important for all S&PA occupations as they become increasingly professionalised, but particularly so for leisure and sport managers, consistent with their typical roles duties.

This skill category comparison therefore provides a useful illustration of the skill similarities between S&PA roles but also what makes them distinctive, both from each other and compared to other occupations in the wider labour market.

Furthering this analysis, the following table provides additional context by looking within each of the major skill categories for S&PA occupations, revealing some of the top specific skills sought by employers (where size is representative of demand frequency in job postings). For example, it shows that the higher-than-average demand for healthcare skills among S&PA workers is specifically driven in large part by employers looking for first aid skills and physiological knowledge. An interactive version of this table is also available at the link in the footnotes.

Finally, factsheets with the top 10 common and specialised skills requirements for each individual S&PA occupations can be found in Annex 2 of this report. These detail further nuances in occupational skill requirements.

Top skills categories across the S&PA occupations

UK | 2022 | SOC4 occupations

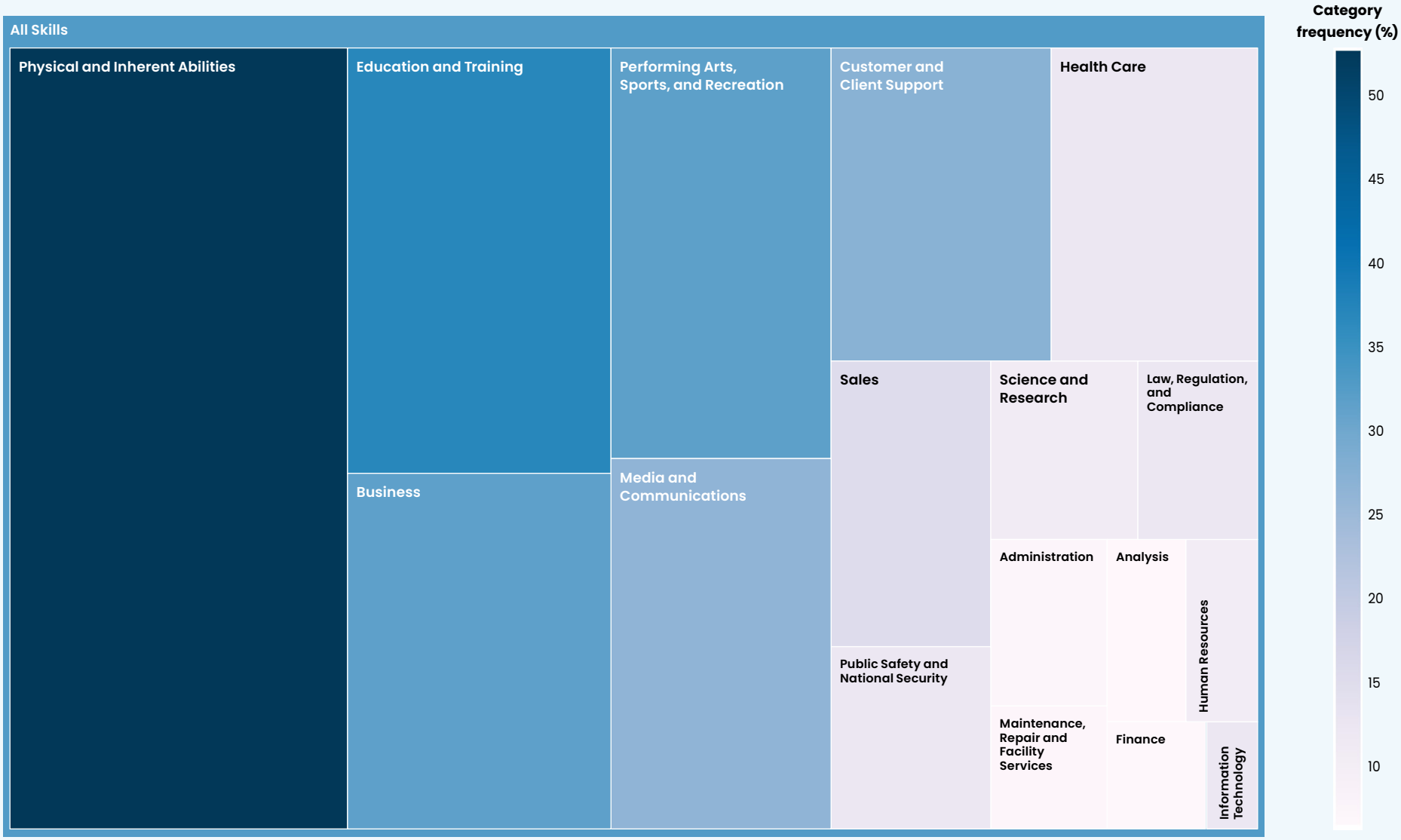
	All S&PA activity occupations	All occupations	Fitness Instructors	Sports and Leisure Assistants	Sports Coaches, Instructors and Officials	Leisure and Sports Managers
Physical and Inherent Abilities	52.6	47.8	45.3	52.0	59.8	54.6
Education and Training	37.0	13.6	51.4	18.8	39.1	13.3
Performing Arts, Sports and Recreation	31.7	0.8	45.9	15.8	32.6	5.9
Business	31.6	43.4	32.4	28.1	30.2	57.7
Health Care	28.5	16.3	43.9	20.6	20.8	17.7
Customer and Client Support	27.1	17.8	28.5	40.7	15.3	34.7
Media and Communications	26.4	36.5	13.4	30.0	35.0	35.5
Sales	15.1	19.0	14.4	19.1	11.1	30.6
Public Safety and National Security	12.4	2.4	1.6	41.4	3.1	4.4
Law, Regulation and Compliance	12.2	17.9	4.9	21.9	11.3	21.5
Information Technology	10.9	28.3	9.0	10.5	13.8	15.0
Science and Research	10.8	7.8	23.9	2.1	5.3	4.1
Human Resources	10.6	6.8	12.7	10.5	8.7	10.0
Marketing and Public Relations	8.2	11.3	7.5	8.7	7.4	18.2
Administration	7.4	15.9	5.0	5.9	9.6	15.2
Maintenance, Repair and Facility Services	7.2	8.5	3.2	17.8	3.3	9.7
Finance	6.7	19.3	5.6	6.1	6.2	22.5
Analysis	6.5	12.7	2.4	4.4	12.1	5.7
Transportation, Supply Chain and Logistics	3.1	12.5	1.6	4.6	2.8	7.5
Hospitality and Food Services	3.0	4.7	1.5	4.4	2.8	8.5
Social and Human Services	2.2	3.0	0.7	1.6	4.2	2.0
Engineering	1.6	9.8	1.9	1.3	1.7	1.5
Manufacturing and Production	1.6	8.6	1.0	2.1	1.9	1.8
Personal Care and Services	1.4	0.4	0.2	1.7	2.0	4.8
Economics, Policy and Social Studies	1.3	2.5	0.4	0.8	2.4	1.3
Design	1.1	4.0	0.7	1.3	1.2	1.8
Architecture and Construction	0.8	5.6	0.7	0.8	1.0	1.7
Environment	0.8	2.1	0.5	1.4	0.6	1.1
Energy and Utilities	0.5	1.4	0.4	0.5	0.5	0.5
Agriculture, Horticulture and Landscaping	0.2	0.5	0.1	0.2	0.2	0.1
Property and Real Estate	0.1	0.7	0.1	0.1	0.1	0.3

Proportion of job postings requiring skills from category (%)

Source: Lightcast Job Postings

Skills for sport and physical activity: inside skills categories[45]

UK | 2022 | SOC4 occupations



45 **Interactive weblink**

‘Defining’ skills for the S&PA occupations

Among all the top skills required in job postings related to S&PA occupations, some stand out as particularly significant or unique to the workforce compared to the wider workforce. These are grouped into eight ‘Core S&PA’ skill categories below including:[46]

1 **General instructing and coaching**

2 **Sports coaching and athletic training** – specific sport and athletic training skills.

3 **First Aid**

4 **Lifeguarding**

5 **Fitness certifications and professional recognitions**

6 **Working with children and other vulnerable participants** – skills for working with children, disabled participants and those with mental health challenges, among others.

7 **Physiological knowledge** – skills related to human physiology and anatomy.

8 **Sport disciplines** – knowledge of specific sport disciplines and specialities.

Building on the previous analysis, comparing the S&PA occupations along these ‘core’ specialised skill groupings provides further insight as to what demarcates them in terms of defining skills from other similar roles.

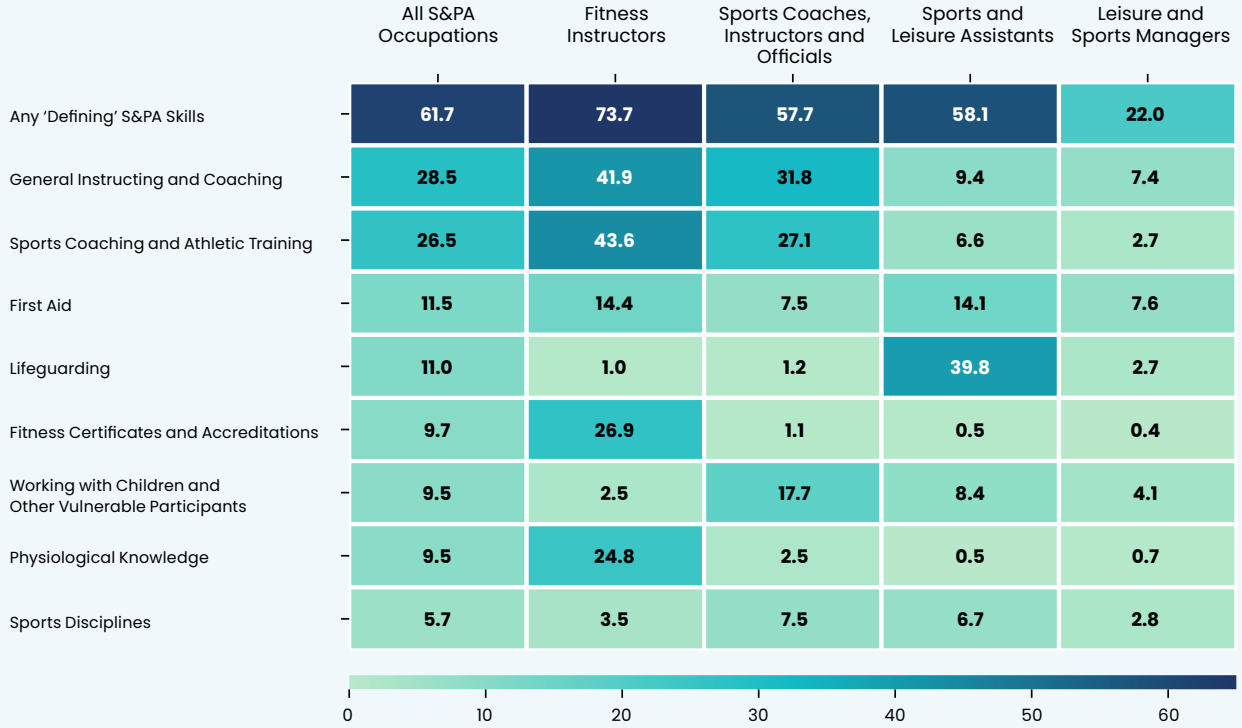
46 **Note:** The specific skills grouping classification for each of these groups can be found in an appendix to this report

As shown in the figure, 62% of all S&PA job postings in 2022 contained at least one of these skills, compared to approximately 9% for all other occupations.

Consistent with earlier findings, the figure shows that coaching – both general and sport/athletic-related – is particularly important for fitness instructors and sport coaches alike, while lifeguarding skills are central for many sport and leisure assistant roles, in line with their most advertised job title. First aid skills are also relatively important to all roles, while, in comparison, fitness certifications and physiological knowledge skills are typically only sought after in fitness instructor job postings. Finally, skills for working specifically with children and other vulnerable participants, as well as specialist sport knowledge, are most concentrated within sport coaches, although the other S&PA occupations sometimes benefit from having these skills too, particularly sport and leisure assistants.

Frequency of ‘defining’ S&PA skills across occupation job postings

UK | 2022 | SOC4 occupations

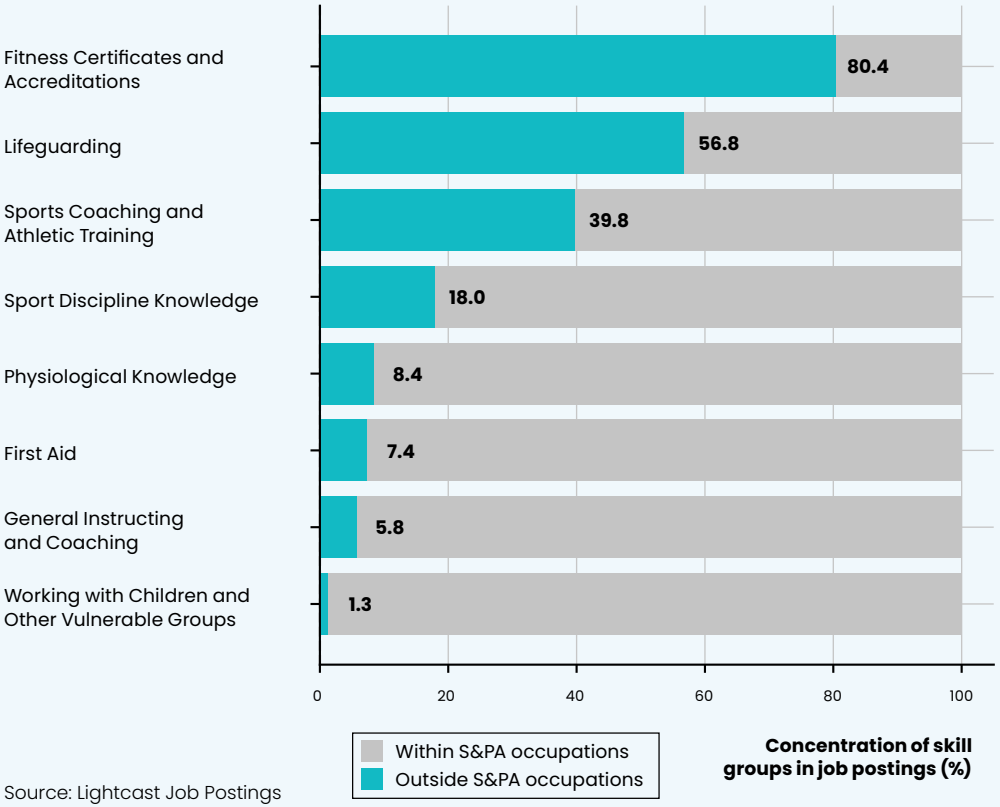


Source: Lightcast Job Postings

While these are some of the more distinguishing skills of the S&PA workforce, particularly in combination, they are not unique solely to these occupations. The figure illustrates the extent to which these skills are concentrated within S&PA occupations. Though there is a significant degree of variation, it is clear that the majority of these 'defining S&PA' skills, including sport specific skills, can be found elsewhere in the labour market, particularly among teaching professionals, healthcare staff, and in other leisure/service sector roles. This has important implications for recruitment and career pathways into the sector (a further discussion on career pathways is set out in section 5.3).

Concentration of relevant 'sport' skill groups in the S&PA occupations

UK | 2022 | SOC4



Source: Lightcast Job Postings

Top SOC4 occupations outside of S&PA requiring skills related to these groups

Teaching and other educational professionals n.e.c. Managers and proprietors in other services n.e.c.
Teaching and other educational professionals n.e.c. Leisure and theme park attendants
Secondary education teaching professionals, Teaching assistants
Care workers and home carers, Teaching and other educational professionals n.e.c.
Physiotherapists, Nurses
Production managers and directors in construction, Nursery nurses and assistants
Programmers and software development professionals, Managers and proprietors in other services n.e.c.
Nurses, Care workers and home carers

5.2 How are skills changing across S&PA occupations?

Skill diversity

As shown in the earlier analysis, employers look for a broad range of skills when recruiting for each of the S&PA occupations, reflecting the diversity of duties of each. The extent of this diversity has been broadened over time however, with employers seeking a wider range of skills than before, as shown by the figure.[47]

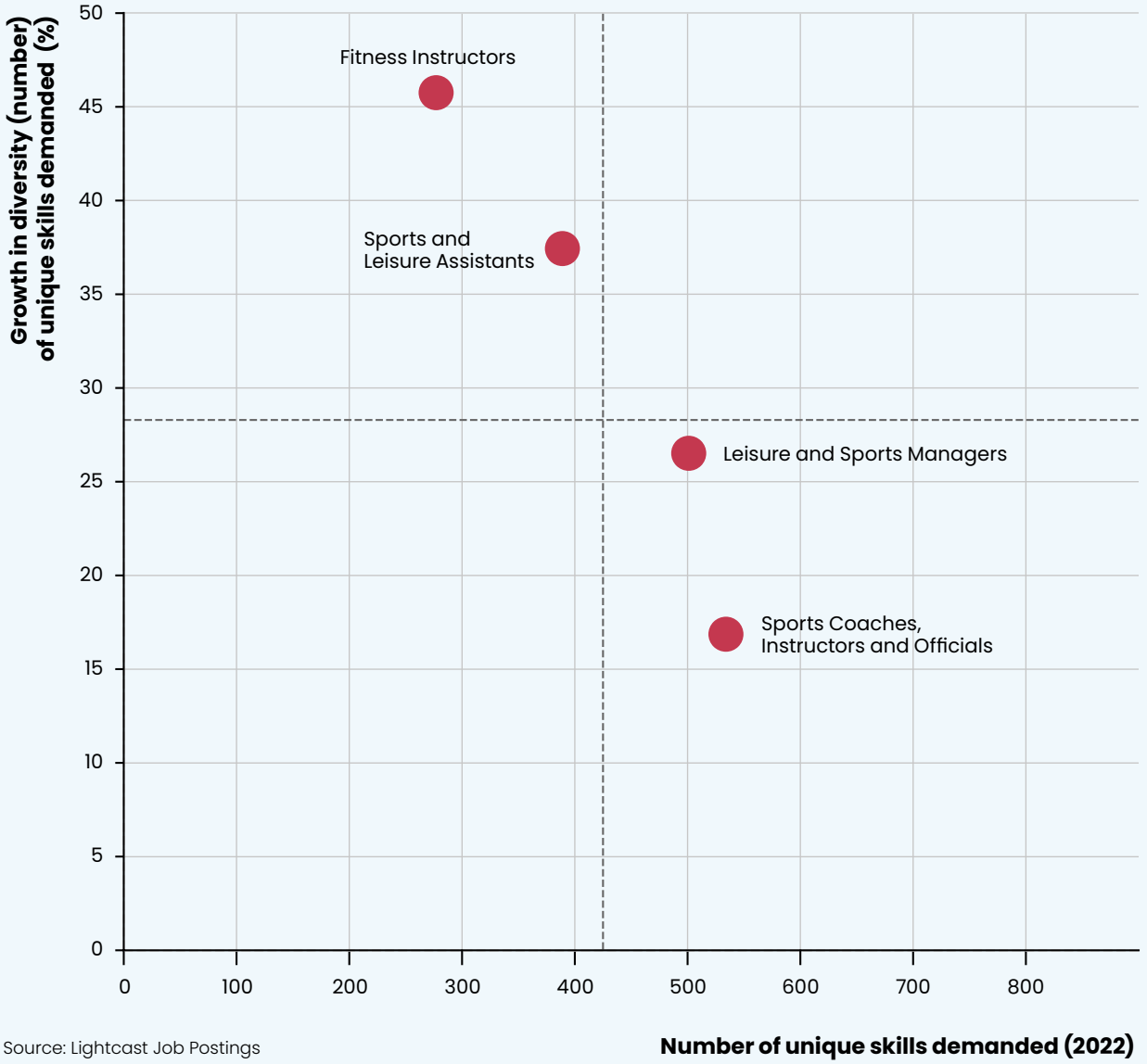
For all S&PA occupations, skill diversity – absolute number of specific skills mentioned by employers in job postings – grew relative to their 2019 pre-pandemic levels. This has particularly been the case among fitness instructors, which saw its number of unique skills grow by over 45%.

While this is likely, in part, driven by a greater number of postings in 2022 compared to 2019, it also suggests that these roles, from an employer's perspective, require more diverse skill sets than previously. Furthermore, set against the context of a sector struggling with staff retention, this increase in skill requirements may be due to greater role amalgamation – with staff increasingly having multifaceted aspects to their role to deal with greater staff turnover.

47 **Note:** For a skill to be counted in this analysis it had to feature in at least 0.1% of all related job postings for each S&PA occupation, and also appear in at least 5 unique postings. This is to remove noise from the dataset

Growing skill diversity

UK | 2019-2022 | S&PA SOC4 occupations



Source: Lightcast Job Postings

Changing skill composition

While the number of skills sought by employers has grown post-COVID, the composition of these has also shifted, markedly in some instances.

For example, relative to 2019, proportionally fewer roles advertised sought specific sport and recreation skills (although these are still integral to the S&PA workforce). Simultaneously, employers appear to be placing greater recruitment emphasis on more general customer facing skills, such as client support, education and training, and physical and inherent abilities, which are central to many of the roles in the sector.

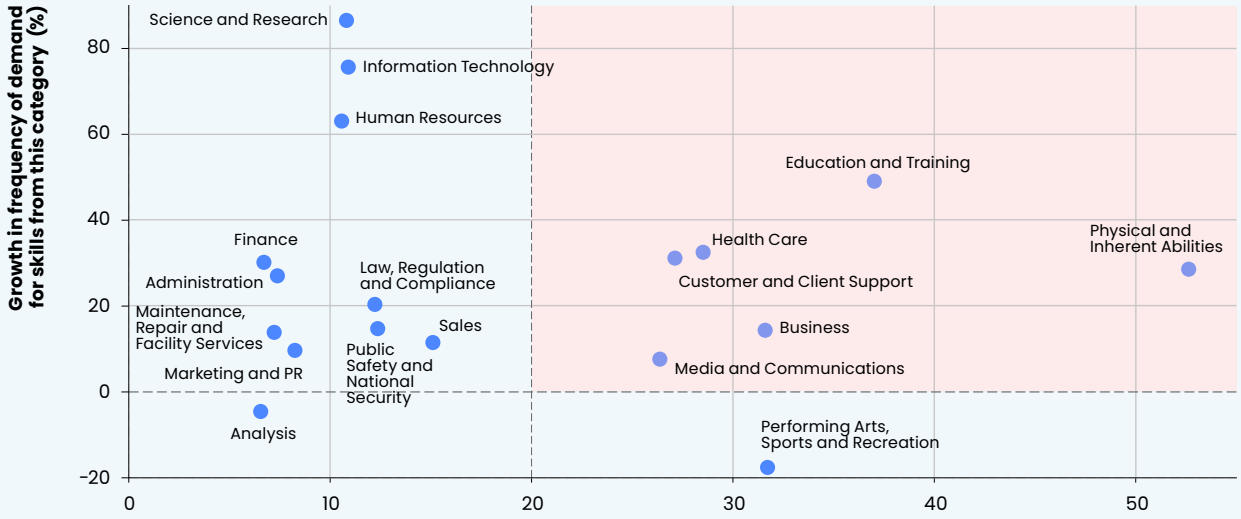
Broadly speaking, the changes in skill compositions observed for S&PA occupations appear to be in line with those of the wider workforce which also saw steady increases in demand for more general skill areas, albeit to a lesser degree. This suggests that, faced with a tight labour market and a labour supply shortage, employers across the economy, and particularly in S&PA, may be lowering skill-based barriers by placing a greater emphasis on more general skills in an effort to attract talent.

CIMSPA's view of the changing skill diversity and composition of S&PA occupations

In CIMSPA's view, the greater skill diversity and the amalgamation of roles, means that the individuals the sector is recruiting have broader skill sets and are adaptable to the changing nature of the sector. As a customer focused sector with many front-line roles, rounded individuals who possess a range of specialised and transferable skills is beneficial as it enables greater skill transferability to meet the multifaceted needs of customers and thereby improves overall service. In doing so, such individuals can increase customer retention, and consequently result in greater participation levels.

However, this increased skill diversity carries several potential risks including greater pressures on individuals who have multifaceted roles, and therefore, higher employee turnover risks. Moreover, a somewhat lower emphasis placed on specialist skills by employers could dilute or lower the standard of some of S&PA specific skills that are fundamental to much of the workforce and their activities. In CIMSPA's view, as the sector takes further steps to being professionally recognised – evidencing the significant impact S&PA has to offer such as through social prescribing – the workforce will continue to need a high prevalence of technical skills among its workers, in addition to transferable skills.

Skill categories: a changing composition UK | 2019-2022 | S&PA SOC4 occupations



Source: Lightcast Job Postings

Fastest growing specific skills

Examining changes in specific skill demands for the S&PA occupations provides further insights as to the changed skills mix sought by employers in 2022 compared to 2019. This provides an indication of how the skills for S&PA roles are evolving over time, based on the type of roles being advertised. Consistent with the previous chart, general transferable skills (such as planning, professionalism and customer service) as well as more specialised fitness skills (such as instructing and circuit training) saw the largest percentage point increases in job posting demand.

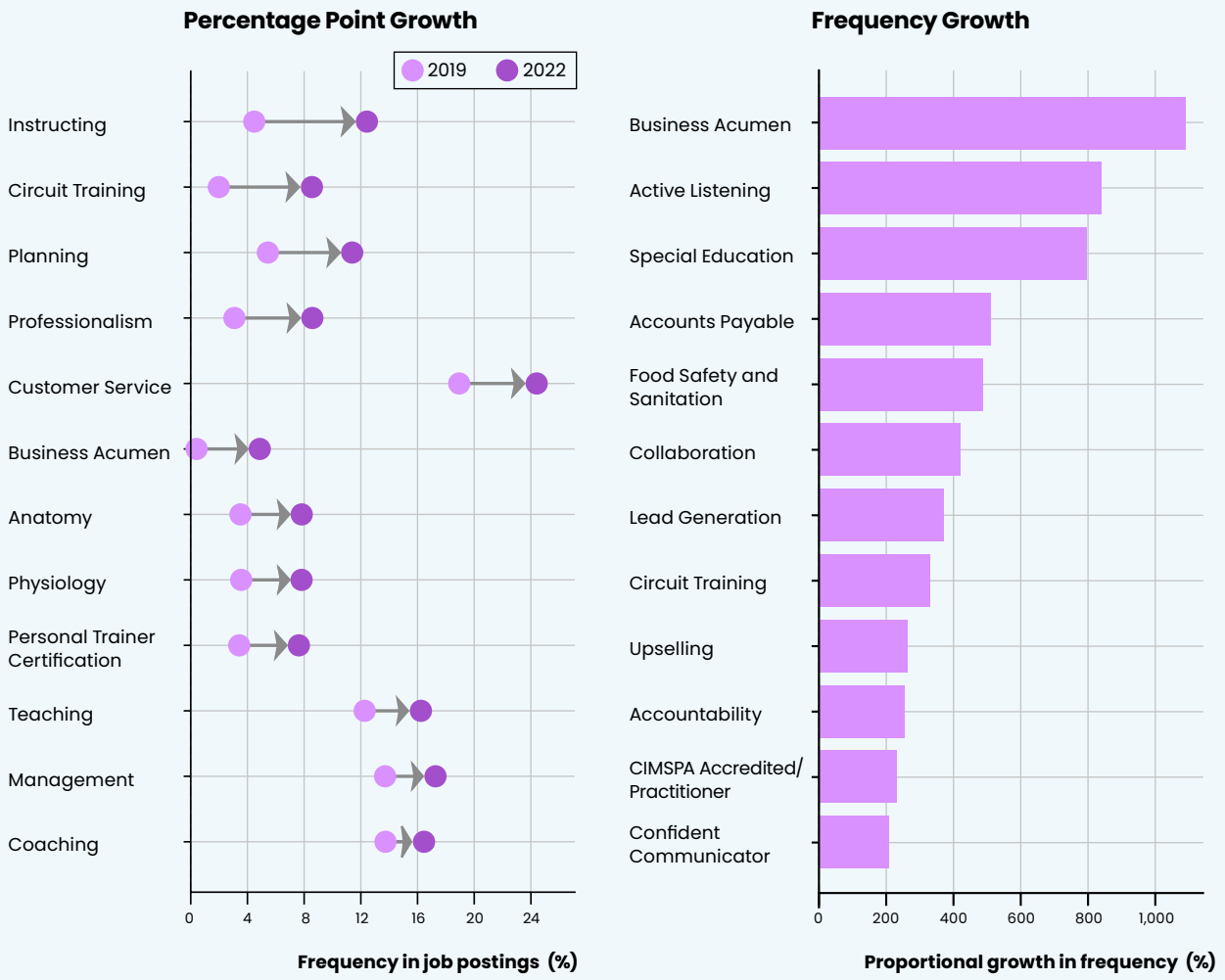
Whilst absolute percentage point changes are useful, it is also instructive to identify those skills with the greatest proportional growth in frequency.[48] While these may not be the most sought-after skills, they are helpful in discerning what areas are growing most quickly in importance for S&PA roles. In this instance a range of business and commercial skills are among the fastest growing and emerging skills suggesting that having a strong grasp of business is becoming increasingly important – consistent with a sector that is rapidly professionalising.

There has also been emerging growth for specific support skills, with roles increasingly requiring the ability to communicate confidently and work well with a broader range of participants, such as children and those with special educational needs.

The factsheets in Annex 2 of this report breakdown skill growth further, illustrating top 10 fastest growing skills for each of the S&PA occupations. These provide further insights as to how the skill requirements of specific occupations are changing.

Fastest growing skills (Percentage point and proportional prevalence)

UK | 2022 | S&PA SOC4 occupations



Source: Lightcast Job Postings

48 **Note:** All fastest growing skills feature in at least 0.5% of all S&PA postings in 2022

Changes in 'defining' S&PA skills

Finally, the analysis looks at changes in 'defining' S&PA skills across the relevant occupations. The key findings here reinforce those already outlined, with employer postings becoming more general in terms of specific sport references, but with greater emphasis on other skill areas important to the professions, such as general instructing and working with children and other vulnerable participants.

The most changed S&PA occupation in terms of how employers are talking about core skills is fitness instructors. This occupation has seen a sharp decline in stated demand for specific sports coaching and athletic training skills, even as it has seen strong growth in more general instructing skills and fitness certifications/qualifications. To unpick this, it is worth noting that this occupational group appears to have a relatively unique element to its recruitment process. This involves some organisations offering short intensive training courses to certify candidates – with no previous S&PA experience – to a professionally recognised standard and then supporting them to take-up an immediately available role with a specific employer in the sector. Although atypical, in the context of a sector struggling with retention this practice may have grown among employers out of a need for them to have a steady supply of qualified workers, while reducing some of the costly recruitment expenses associated with rapid turnover. In doing so, it has also led to an increased professionalisation of the sector and recognition of S&PA specific qualifications (see Chapter 4 case study).

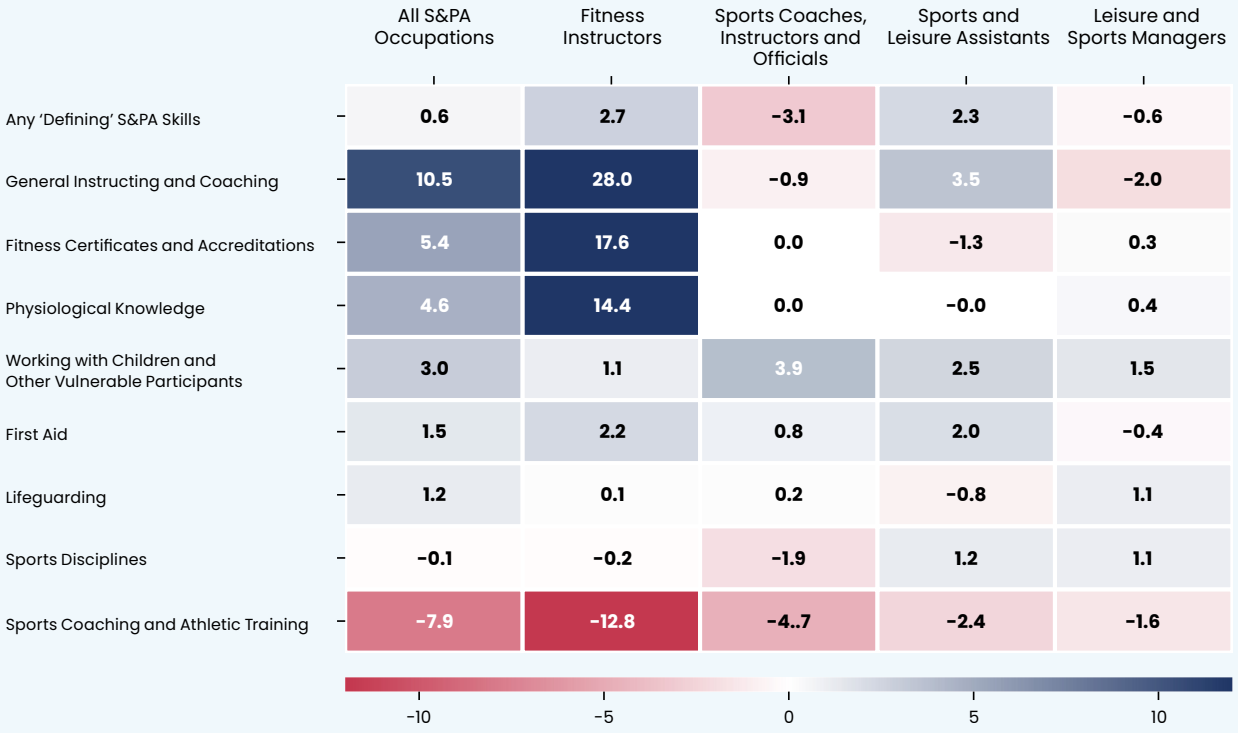
CIMSPA's view on short intensive 'crash' training courses

In CIMSPA's view, all sector-related qualifications should be aligned with the professional, recognised standards that have been developed over recent years. As such, some 'crash' course approaches to qualifications have been a widely criticised practice for some time.

In order to ensure workforce standards remain high across all industry areas, guidance on the delivery and content of training which sits within professional standards, should be followed.

Change in demand for 'defining' S&PA skills

SOC4 occupations | UK | 2019 - 2022 | Percentage point change



Source: Lightcast Job Postings

Demand for software skills in S&PA occupations

Demand for software skills among S&PA roles (8%) is well below that of the average for all occupations (25%). This suggests that software skills – beyond basic administrative tools such as Microsoft Office – are less likely to be critical to employer roles in the industry.

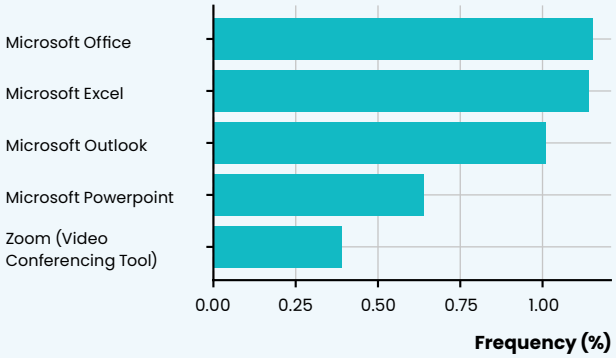
However, relative to pre-COVID levels, demand for software skills among these occupations has grown, driven in large part by video conferencing and other virtual learning environment solutions. In large part this has been the result of the shift to online service delivery (online fitness classes, etc.) during the pandemic. Other occupations beyond S&PA have also seen a rise in demand for similar software skills during and post-pandemic.

While software skills are not highly specified in job postings for S&PA roles, it is worth noting the important role demographics are likely to play. With so much of the workforce in the younger age brackets (Chapter 3) it may well be the case that employers assume (correctly) that most candidates will be digital natives and so will either be familiar with basic software packages, or be able to get up to speed quickly with any specific systems typically used by the employer.

On the other hand, recent research appears to suggest that another contributing factor here is the lack of digital maturity from employers themselves. This in turn affects the ability of the sector to capitalise (or not) on the opportunities that digitalisation may offer.[49]

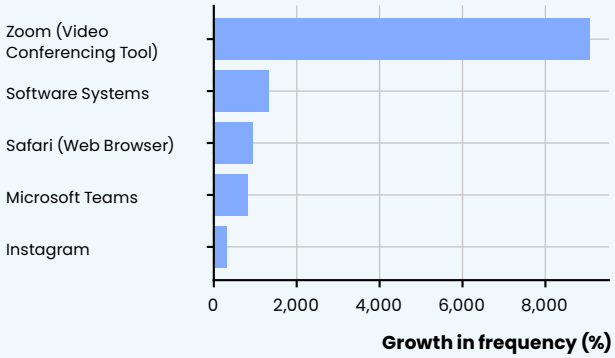
Top 5 software skills

UK | 2019 vs 2022 | S&PA occupations



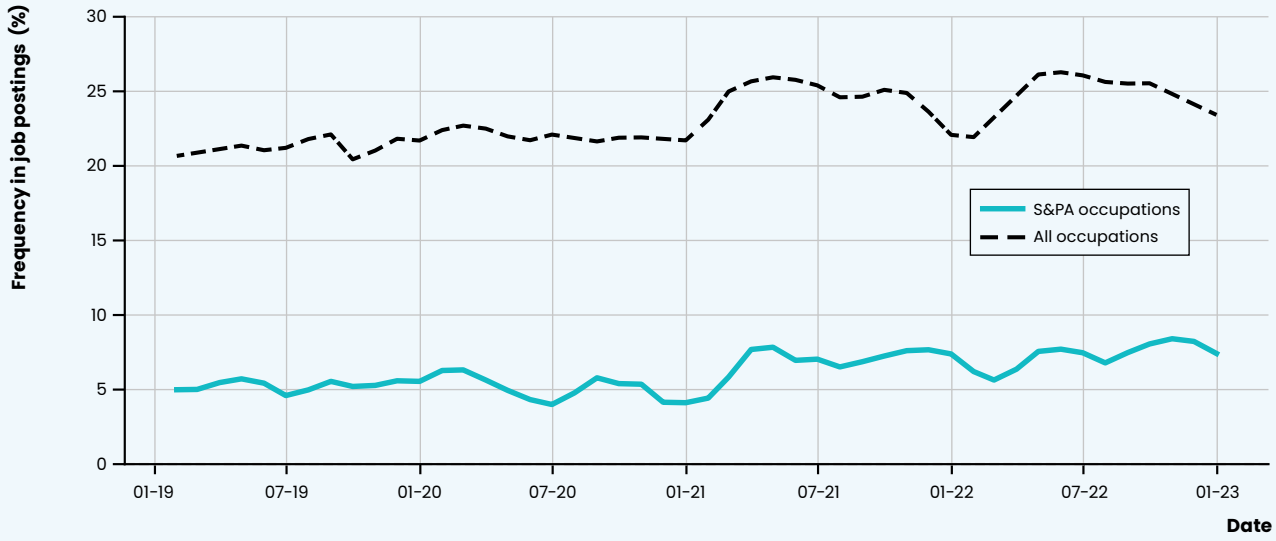
Top 5 fastest growing software skills

UK | 2019 vs 2022 | S&PA occupations



Demand for software skills

UK | 2019-2022 | S&PA occupations



Source: Lightcast Job Postings

49 Digital Futures 2022 Report (UK Active, 2022)

Case study:

CIMSPA's delivering sport and physical activity online policy

Responding to the increased need for guidance around delivering sport and physical activity online, CIMSPA created a vital policy protecting both professionals and participants.

CIMSPA, working with sector partners, developed a new policy to ensure the continued safe delivery of sport and physical activity online. This policy was designed to support individual and independent practitioners across the UK and covers live-streamed, pre-recorded, private and open sessions.

The use of online and digital platforms has been a valuable resource for sport and physical activity practitioners for some time, and accelerated during COVID-19, allowing many to continue to deliver sessions, despite the restrictions. The benefits to customers are also clear, with online delivery being an affordable and convenient way to maintain participation and promote overall health and wellbeing.

With the increased use of online platforms, there are many factors to consider in ensuring the continued safety of both participants and practitioners. Following a consultation with the sector, and with support from partners across the sector, CIMSPA created its first UK-wide policy for **delivering sport and physical activity online**.

Automation and technology change – looking to the future

The previous iteration of this Workforce Insights Report (2020) conducted an analysis of the S&PA occupations in terms of their susceptibility to automation risks. More specifically, Lightcast's automation model examined the task content of each role, working time spent performing the task and how exposed those tasks were to technology changes anticipated over the coming decades.

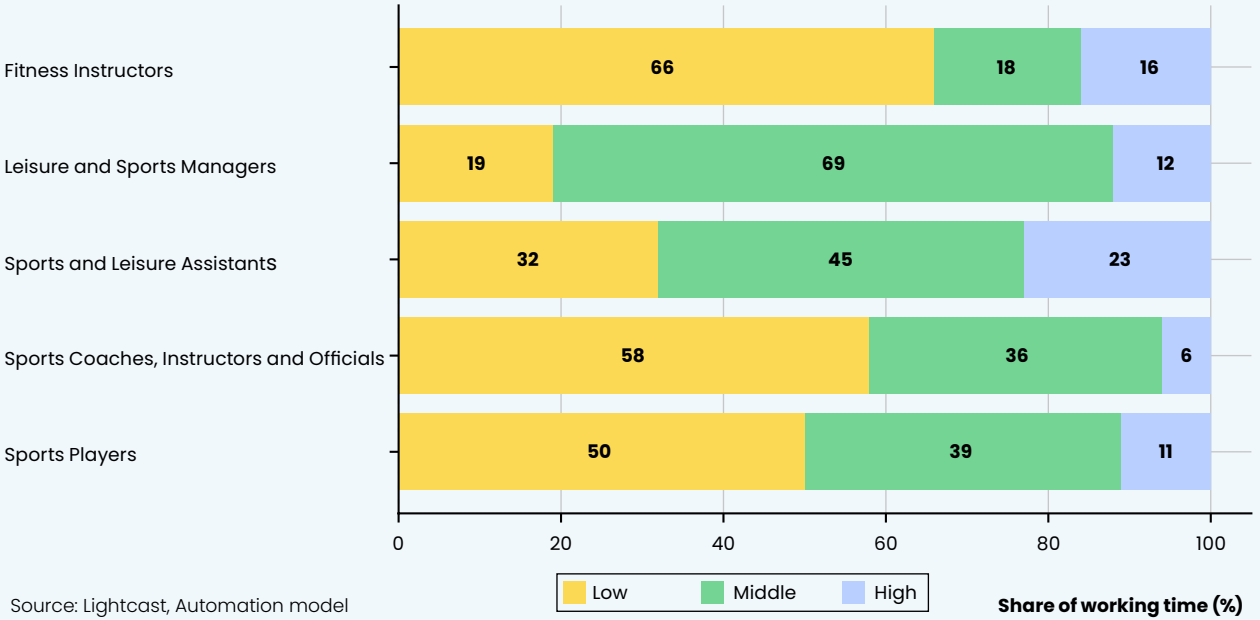
Of the five S&PA occupations, all had below-average task time that was classified as being at 'High' exposure to disruption through automation advances (the national average was 27 per cent). The emphasis in S&PA roles on creative thinking, creative physical activity, coaching and developing and training, and teaching others all leads to a low level of overall exposure to technology change, with these attributes and role elements being difficult to automate and standardise.

While the model underpinning this analysis has not changed since the previous report, the advancement of technological progress has been relentless. The past 12 months alone have seen the rapid emergence of novel Artificial Intelligence (AI) and other machine learning (ML) systems that could have the potential to significantly disrupt sectors right across the economy, including those previously thought to be of lower risk. While this technology is still in early development, with use cases still being defined, its growing application across the economy is something that should be monitored closely from both an employment and skills perspective in the years ahead.

CIMSPA continues to monitor this and explore opportunities for upskilling the workforce as technology advances and changes the landscape. An example of this includes the **Digital Marketing Hub** providing members of the S&PA workforce and organisations with the skills, expertise and resources to effectively reach and engage with audiences through digital channels.

Automation risk

UK | S&PA SOC4 occupations



Source: Lightcast, Automation model

Employer perspective
Digital natives and software skills in the S&PA workplace

Rhys Jones, CEO Plymouth Active Leisure:

"I can't say I have noticed that employers are now requiring less specific software skills from their workforce when hiring because of a higher level of digital competency across younger generations. But, thinking about it, I have known younger staff to be approached to helpout with certain social media sites and technology like video editing. The question of if people are computer literate and use software is often laughed at now as everyone is much more used to using IT and digital."

5.3 Career pathways

Skills based progression paths for S&PA roles

Understanding the necessary and changing skills for specific job roles is in of itself extremely useful for policymakers and educators working in the S&PA sector. On top of that however, having an awareness of these skills (both common and specialised) can also enable connections and similarities to be drawn with other occupations in the economy, often unrelated to the sector. In doing so, skills expertise has the potential to create both organic employment progression pathways for workers as well as outlining potential talent pipelines for employers. This offers unique insights to policymakers in the S&PA sector, helping better understand retention challenges and refine workforce strategies.

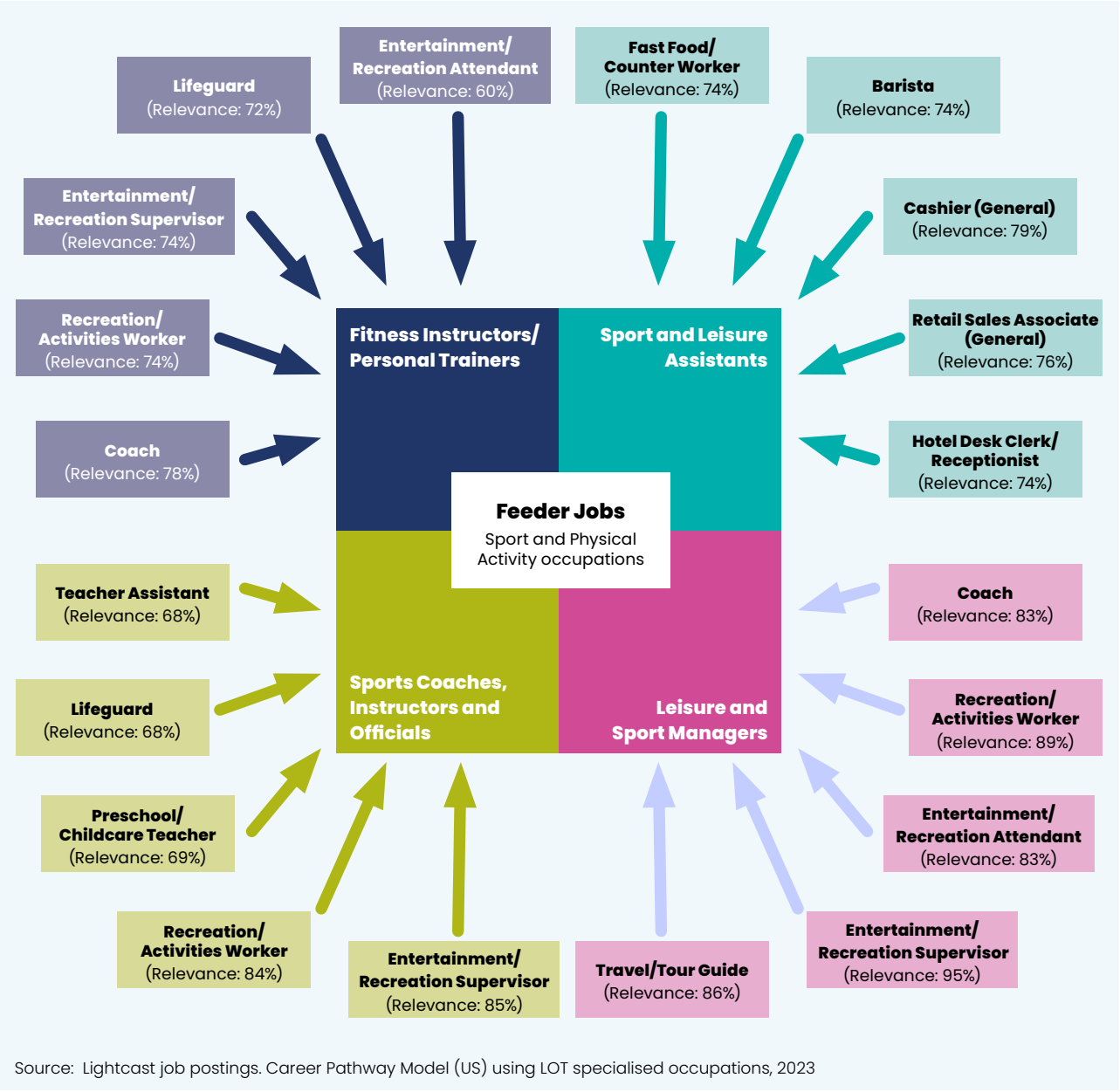
Using Lightcast's experimental Career Pathways model – which combines job postings with real-world worker profiles data – this analysis takes a broader view of the labour market for S&PA roles and identifies similar jobs based on adjacent skills.

Feeder jobs

The career pathways analysis looks first as 'feeder' jobs into the core S&PA occupations. These feeder jobs are roles from across the workforce that have broadly similar skill sets but that typically have lower (or similar) median pay, and where a move into the associated S&PA occupation would represent a career advancement. The 'relevance' score associated with each feeder job indicates how closely aligned its typical skills are with the target S&PA occupation.

As shown in the figure, there are a wide variety of feeder jobs associated with each of the S&PA occupations. Some of these feeder jobs – such as recreation/activities worker to leisure and sport manager – are from the same broad family of occupations thereby representing a natural vertical advancement. Others – such as preschool/childcare teacher to sports coach and instructor – are a little more distant, requiring workers to make a lateral move to a different occupational group in order to advance. For most of the S&PA occupations, feeder jobs are typically either more junior sport or leisure roles or junior roles from within the wider services sector.

For employers, these feeder occupations represent important sources of recruitment, given they already have a significant number of the key skills, competencies and attributes required to succeed in S&PA roles. Many of the roles identified – such as bar staff and receptionists – are already part of the non-specialist S&PA workforce and therefore represent a good source of potential talent for S&PA specific entry level positions .



Source: Lightcast job postings. Career Pathway Model (US) using LOT specialised occupations, 2023

Next step jobs

For those already in S&PA positions looking forward, next step jobs represent career advancements that typically command higher average salaries. For most of the S&PA occupations these are typically moves into more managerial or specialist/ consultant roles, areas with a high degree of expertise and responsibility. As shown in the figure, in addition to there being opportunities for progression beyond S&PA, there are also a lot of opportunities for progression within the sector that employers can use to retain talent.

Source: Lightcast job postings. Career Pathway Model (US) using LOT specialised occupations, 2023

CIMSPA

Chapter 6

Regional presences

Key insights

- **Absolute job numbers consistent with population:** Consistent with distribution of UK population and typical labour market trends, the absolute number of jobs relating to both S&PA industries and occupations are most heavily concentrated in London and the South East.
- **Relative regional concentrations evenly distributed nationwide:** Considering the relative regional concentration of S&PA jobs (location quotient) reveals a much more even distribution of jobs across the UK, reflective of the sector's position as being one primarily focused on providing services locally.
- **Recruitment activity higher across regions compared to pre-pandemic:** Numbers of postings have grown in almost all regions (with the exception of the West Midlands) relative to pre-pandemic levels. This suggests that regions may have endured broadly similar dynamic S&PA labour markets post-COVID, and have faced similar challenges in terms of recruitment and retention.
- **Median advertised salaries consistently lower:** Across all regions, median advertised salaries for S&PA occupations are lower than the regional median for all occupations. However, the degree to which they are lower varies across regions.
- **Positive relationship between activity rates and S&PA posting levels:** Areas in England with higher sport and physical activity participation rates also tended to have a higher share of job postings that were attributable to S&PA roles.

Up to this point, all of the analysis in this report has been conducted at the UK national level. However, what is considered 'the labour market' is in practice a set of distinct regional labour markets, each with their own dynamics of supply and demand, driven by economics and social trends much wider than any one industry. Understanding the sport and physical activity labour market therefore requires an investigation as to its composition in different parts of the UK.

Using key metrics presented in the first five chapters of the report, this chapter uncovers some of the key trends and relative strengths for the S&PA workforce across the UK. Using the broad UK NUTS1 regional classification, the analysis presented in this section will cover the four nations and the nine broad regions within England, both in terms of jobs and recruitment activity.[50]

6.1 S&PA jobs by region

Absolute job numbers

Consistent with wider UK population and labour market trends, total job numbers relating to both S&PA industries and occupations are most heavily concentrated in England's South East and Greater London regions. These two regions alone account for 40,400 (14.6%) and 40,700 (14.7%) of all S&PA occupational jobs respectively, and 57,200 (14%) and 56,100 (13.7%) of all S&PA industry jobs.[51]

Outside of the wider South East, most jobs relating to the sport and physical activities are located in England's North West. Regions accounting for relatively few S&PA jobs, in absolute terms, are Wales, Northern Ireland and North East England.

Regional specialisation (location quotient)

Looking at relative regional concentrations, however, shows that S&PA jobs play a similar role in regional economies across the country. This is done using Lightcast's location quotient methodology which uses jobs data to quantify how concentrated a particular occupational group is in a region as compared to the national average, and in doing so reveals what makes the region "unique".[52]

As shown in the S&PA location quotient charts for industries on the next page, S&PA jobs are much more evenly distributed across the country than absolute job numbers would initially suggest. This is understandable given that S&PA are typically local services for people living in the area and therefore, they are found right across the UK in broadly even terms. The East Midlands is a notable exception to this, with a higher-than-average concentration of S&PA industry and occupational jobs. In contrast, Northern Ireland too stands out for a lower-than-average concentration.

50 **Note:** ONS classification of UK NUTS regions (ITLs)

51 **Note:** S&PA freelancers are not included in these regional figures due to sample size limitations

52 **Note:** For each of the location quotient matrices, values above 1 indicate that a particular occupation/industry is more concentrated at that 'local' level relative to the national level

S&PA occupational regional specialisation UK NUTS1 | 2022 | Location Quotient

	All S&PA occupations	Fitness Instructors	Leisure and Sports Managers	Sports Coaches, Instructors and Officials	Sports Players	Sports and Leisure Assistants
East Midlands	1.3	1.6	1.0	1.6	1.4	1.0
South West	1.1	0.8	1.1	1.1	1.2	1.4
South East	1.1	1.1	1.1	1.1	1.4	1.0
Wales	1.1	0.8	0.9	1.1	0.6	1.3
North West	1.0	1.1	1.0	0.9	1.2	1.0
East of England	1.0	1.3	1.0	0.9	0.9	1.0
Scotland	1.0	0.9	0.9	0.9	1.1	1.2
West Midlands	0.9	0.7	1.1	1.0	0.8	0.9
Yorkshire and The Humber	0.9	0.7	1.0	0.9	0.8	0.9
London	0.9	1.0	1.0	0.8	0.6	0.8
North East	0.9	1.0	0.8	0.8	1.2	0.9
Northern Ireland	0.7	0.4	0.5	0.7	0.9	0.7

Location Quotient – Region's occupational specialisation relative to UK average (=1)

S&PA industry regional specialisation UK NUTS1 | 2022 | Location Quotient

	All S&PA industries	Activities of Sports Clubs	Fitness Facilities	Operation of Sports Facilities	Other Sports Activities	Sports and Recreation Education
East Midlands	1.6	1.8	1.4	1.5	2.4	1.0
North West	1.1	1.3	1.1	1.1	1.0	0.5
East of England	1.1	1.0	1.1	1.1	1.2	1.6
South East	1.1	1.1	1.1	0.9	1.0	1.2
Scotland	1.0	1.1	0.9	1.0	1.1	0.9
Wales	1.0	0.9	0.6	1.4	0.9	0.7
West Midlands	1.0	1.0	1.0	1.0	0.9	0.8
South West	0.9	0.8	0.7	1.1	0.7	1.4
Yorkshire and The Humber	0.8	0.8	0.6	0.9	0.7	1.4
London	0.8	0.7	1.3	0.7	0.9	0.8
North East	0.7	0.7	0.6	0.7	0.5	0.9
Northern Ireland	0.6	0.8	0.5	0.6	0.6	0.4

Source: Lightcast (2023.1)

Location Quotient – Region's industry specialisation relative to UK average (=1)

6.2 S&PA recruitment trends by region

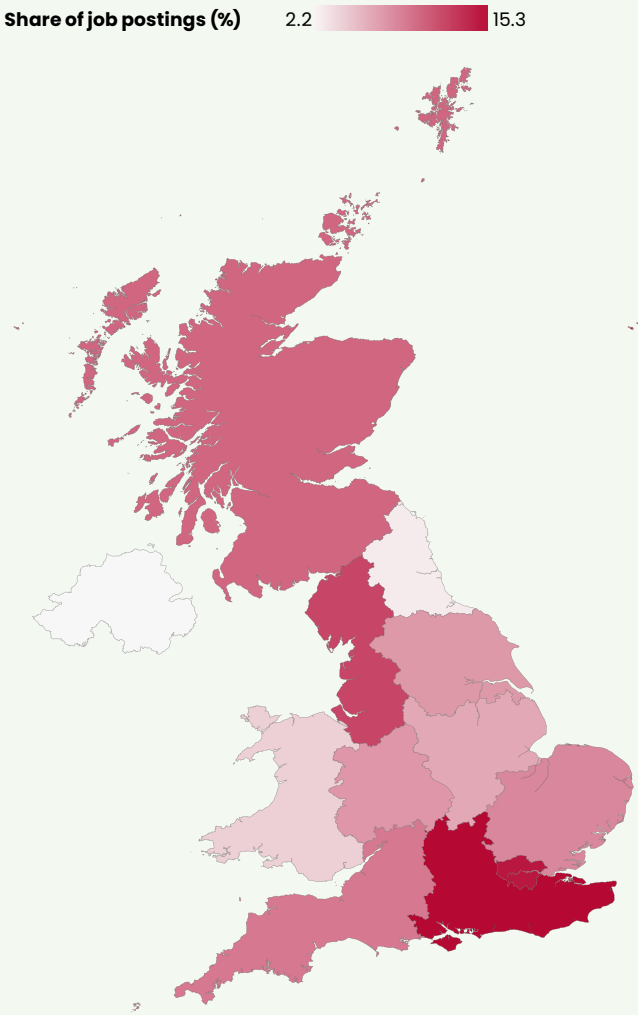
Job postings

Turning to regional recruitment trends in 2022 reveals a trend much similar to that of overall job numbers, with England's South East and London accounting for the highest shares of S&PA occupational job postings, 15.3% and 14.6% respectively (Figure A).[53] However, in terms of regional concentration (the share of a region's postings accounted for by S&PA roles), it is actually areas such as Wales, Scotland and the North East that have amongst the highest levels (Figure B).

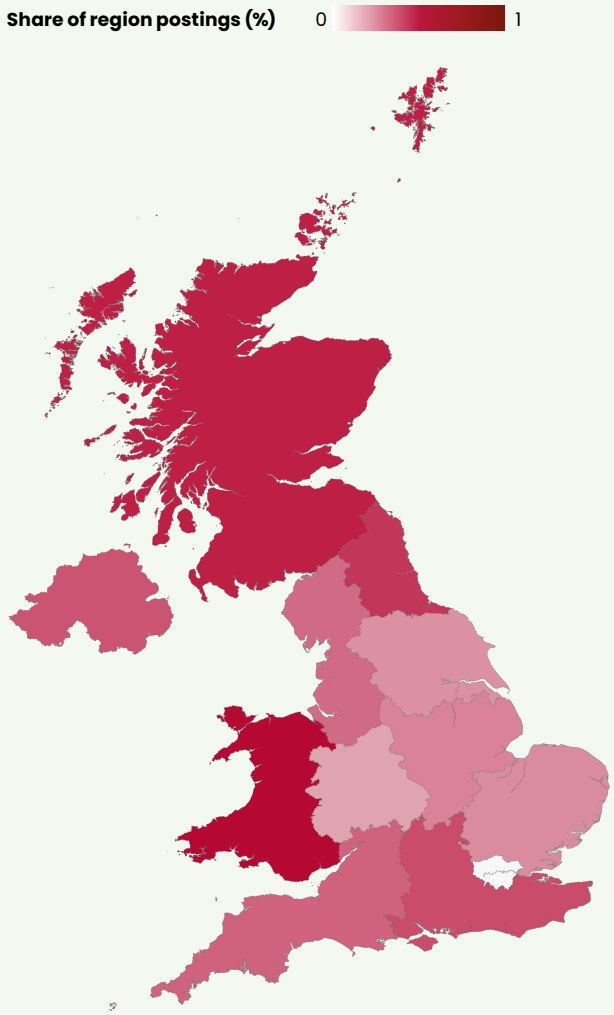
To add more contextual insight to this, the analysis briefly considers the urban-rural split of S&PA job postings at a local authority level. From this, it is clear that the vast majority of postings are clustered in major urban centres, such as London, Manchester, Birmingham and Glasgow. Again proportionally, however, rural areas tend to have a higher concentration of S&PA-related postings than their urban counterparts, albeit volumes are typically small. This is likely attributable to the greater diversity of jobs (beyond S&PA) found in urban centres that are not typically located in rural regions. In this way the S&PA sector may play a more prominent role in rural labour markets.

53 **Note:** For job posting analysis it is important to be aware that not all postings give detailed location information about the role beyond that it is located within the UK. For the S&PA occupations in 2022 detailed location information is available for approximately 76.3% of relevant postings (approx. 54,200)

A: Regional distribution of job postings
UK NUTS1 | 2022 | S&PA occupations



B: Regional concentration of sport postings
UK NUTS1 | 2022 | S&PA occupations



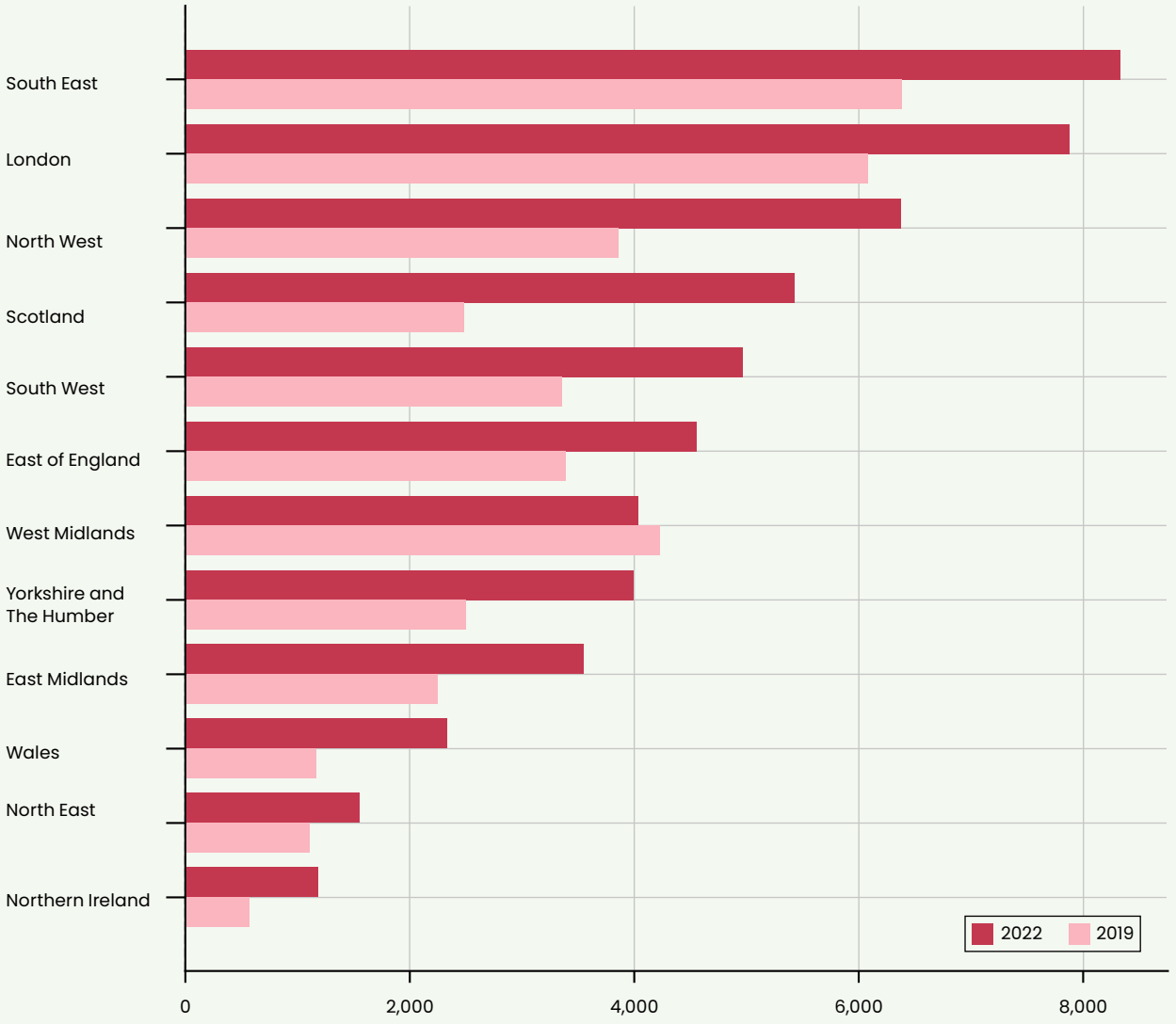
Source: Lightcast job postings

Relative to 2019 pre-COVID levels, recruitment activity in 2022 has been higher in almost all UK regions, with the exception of England's West Midlands. Particularly strong growth in S&PA recruitment activity has been seen in the devolved nations of Scotland, Wales and Northern Ireland, albeit that they have typically grown from relatively low levels. The growth across the UK in general however, suggests that the S&PA labour market is very active across the country post-COVID, with a strong demand for the services of S&PA employers.

The strong growth in posting volumes across regions, similar to the UK average for S&PA occupations, may also be indicative of the fact that regions have endured similarly dynamic S&PA labour markets post-COVID. While there appears to be variation across the UK, it is likely that most regions, faced similar challenges in terms of recruitment and retention to those of the sector overall.

Recruitment activity (pre- vs post-COVID)

UK | S&PA occupations | SOC4



Source: Lightcast job postings

Median advertised salary

In line with typical labour market trends, median advertised salaries for S&PA occupations are highest in London (£27,700), followed by the North West (£24,300) (Figure A). In general, however, they are relatively even across the rest of the country around £22,000 – £24,000.[54]

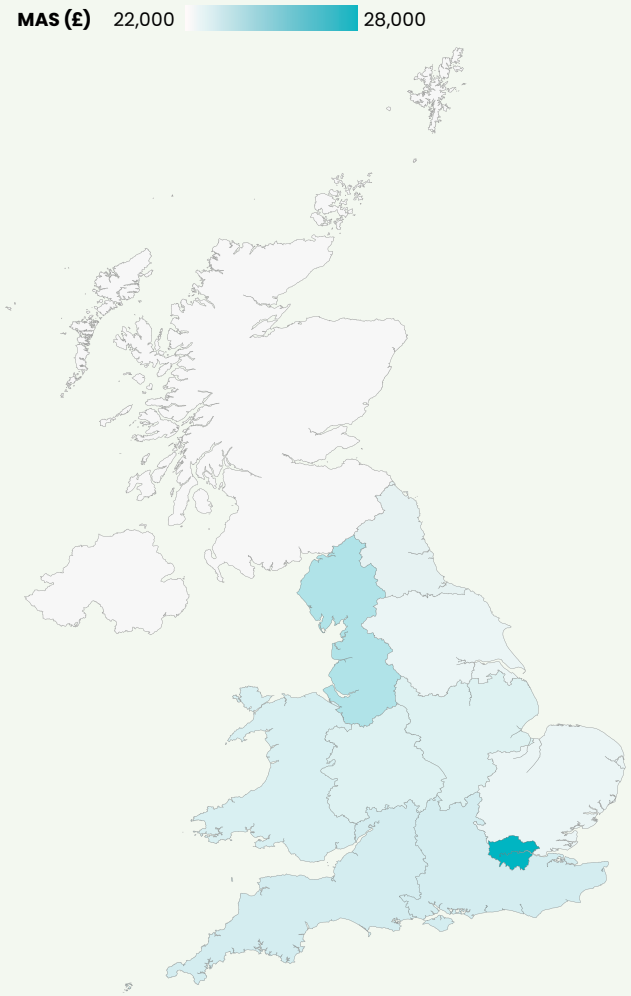
Comparing median advertised salaries for S&PA workers to regional average salaries overall shows a somewhat different picture (Figure B). On one hand, in the devolved nations as well as in North East England and in the East Midlands, S&PA salaries are only slightly below the regional average. In contrast, in London advertised salaries for S&PA workers equate to 67% of the median for the area. This is largely driven by London's unique workforce composition including a disproportionate number of finance and ICT roles, many of whom command salaries well in excess of the national average.[55] Broader workforce compositions for all regions are therefore likely to be a key factor in determining relative levels of S&PA advertised salaries, with all regions having unique occupational specialisations.

54 **Note:** Caution advised when interpreting median advertised salary figures given the relative low share of postings that include this information, particularly at a regional level

55 **Note:** While broader regional workforce compositions are a key factor in determining relative median advertised salaries for S&PA roles, the composition of occupational recruitment within S&PA itself is likely to be another important factor (these are illustrated in more detail within the regional factsheets in Annex 3)

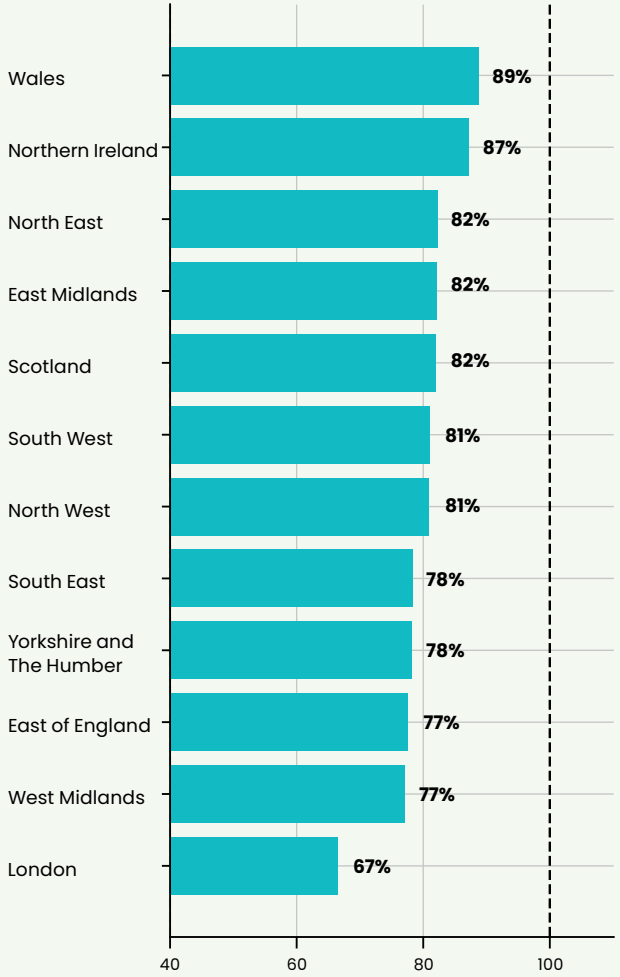
A: Median advertised salary levels

UK NUTS1 | 2022 | S&PA occupations



B: Median advertised salary relative to regional average

UK NUTS1 | 2022 | S&PA occupations



Source: Lightcast job postings

S&PA activity participation rates

In April 2023, Sport England published its latest Active Lives Adult Survey (Nov 2021 – Nov 2022), which provides a unique measure of physical activity participation levels of people across England.[56]

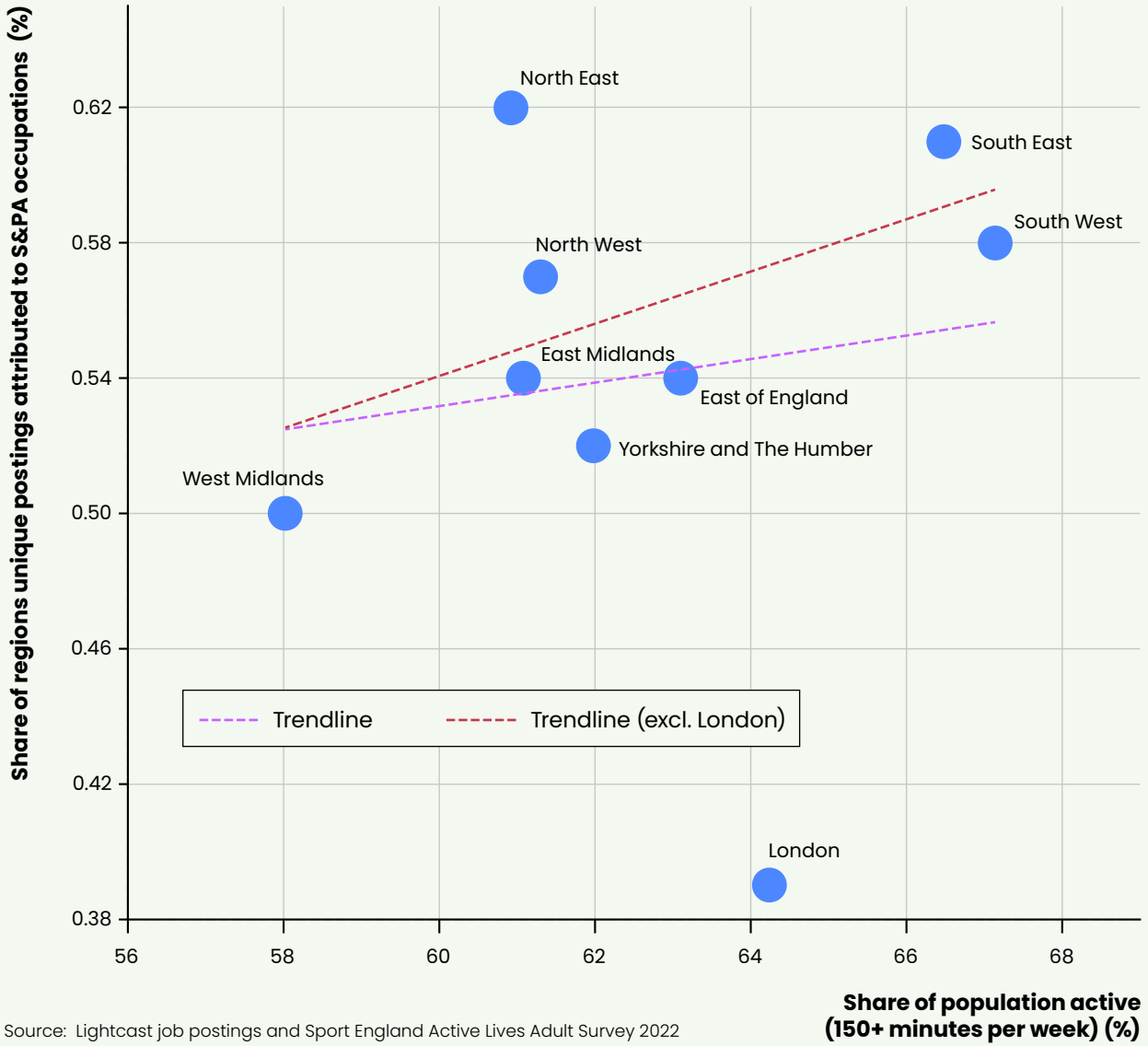
By overlaying these regional variations in participation over regional S&PA job posting concentrations, reveals a positive correlation. Areas with higher S&PA participation rates also tended to have a higher share of job postings that were attributable to S&PA roles. The South East and South West for example, two regions with the highest activity rates, are also regions with a higher than average share of job postings being related to the recruitment of S&PA professionals. In contrast, the West Midlands is towards the lower end of the spectrum, with lower scores for each of these measures. London and the North East appear to be outliers here and this may be linked to other jobs available in the economy.

While the exact causal link between these two metrics is not entirely clear, it is possible that physical activity participation rates do play a role in determining labour market demand for S&PA professionals.

56 Active Lives Adult Survey (Nov 2021 – Nov 2022) – Sport England (2023)

Relationship between S&PA participation and regional S&PA job posting concentration

England NUTS1 | 2022 | S&PA SOC4 occupations



Source: Lightcast job postings and Sport England Active Lives Adult Survey 2022

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Chapter 7

Recommendations

Based on the key research findings and themes emerging from this report, CIMSPA and its partners have begun to consider policy recommendations for further strengthening the sector, post–pandemic.

These recommendations highlight the core areas where concerted policy action may be most effective in supporting, sustaining and growing the professional S&PA workforce over the long run. Most notably these include tackling the sector's staff retention challenge, building clear career pathways for workers – both into and within the sector – and further encouraging the growth of a demographically diverse workforce that is more representative of the overall UK participant population.

CIMSPA's proposed recommendations for each of these areas are presented in greater detail below:

CIMSPA recommendations

Talent retention strategies – the cost of continually having to recruit is crippling businesses at all levels across sport and physical activity. The investment and support driven into the sector over the last 3 years has been vast, but we cannot rely on this moving forwards. The incredible people that make up sport and physical activity need better support, reward, recognition and investment if we are to drive this life-giving sector forwards both as a legitimate career and a reliable resource.

Improved diversity – engaging more of the population in sport, fitness and leisure requires a more diverse and inclusive workforce. In comparison to the wider economy, our sector lacks diversity and for some communities has poor representation which is a barrier to participation. The sector needs to approach diversity on all levels if we are to engage more effectively with a wider proportion of the UK, particularly culturally diverse communities and disabled people. Benchmarking against sector norms can provide a useful indicator with support being available from CIMSPA.

Better engagement with volunteers and non-sector roles – Following 2020, this report highlights the vast population that makes up the vital non-sector roles that we rely on across the UK every day to keep facilities open, services running, and our participants looked after. Many of these roles are entry level and brilliant introductions into the career opportunities sport and physical activity offers. By engaging more with this vast population and sharing sector-specific opportunities we have a ready-made recruitment channel that is not fully being activated.

The power of community – The insights shared in this report highlight the unique differences that exist regionally across the UK. Each region has its own needs, demands and strategies that will work best.

To have a meaningful impact across the UK, sport and physical activity needs to harness the power of community and better connect ourselves in order to better serve our regional communities. CIMSPA's hyperlocal approach to connecting local needs to the provision of local training will mean that we reduce the current overspend and wastage on skills and training and importantly ensure the workforce are skilled appropriately and better equipped to support local communities. If you're not already involved, please contact the CIMSPA partnership team to find out more: partners@cimspa.co.uk

Career pathways – this remains a critical jigsaw piece for the sector. Such is the complexity of the different routes into sport and physical activity and progression routes through it, providing clear guidance to current and future members of the workforce has been challenging. However, if we want to retain talent, build true recognition for our incredible workforce and the confidence of the UK population on the professionalism of our immense workforce then career pathways are vital. It's critical for the sector to get behind CIMSPA's professional recognition pathways acknowledging expertise, qualification and experience through professional status and crucially available for all sector roles including coaches, instructors, educators, managers and leaders.

Annex 1
Glossary and definitions

1 Sport and physical activity occupations and industries

- The UK Standard Occupational Classification (SOC) is a hierarchical framework used to classify occupations, enabling comparisons of occupations across different datasets. It is codified based on the skills and qualifications needed for specific jobs.
- The UK Standard Industrial Classification (SIC) of economic activities is a codified hierarchical framework that is intended to help classify businesses according to the type of economic activity in which they are engaged.

Consistent with the previous iteration of this report, the five core UK SOC4 occupations and five SIC4 industries associated with the Sport and Physical Activity workforce are as follows:

1.1 Sport and physical activity SOC occupations[57]

- **Leisure and sports managers (SOC 1225)**
  Organise, direct and coordinate the activities and resources required for the provision of sporting, artistic, theatrical, and other recreational and amenity services.
- **Sports players (SOC 3441)**
  Includes professional sportsmen and women who train and compete, either individually or as part of a team, in their chosen sport for financial gain.
- **Sport coaches, instructors, & officials (SOC 3442)**
  Work with amateur and professional sportsmen and women to enhance performance, encourage greater participation in sport, supervise recreational activities such as canoeing and mountaineering, and organise and officiate at sporting events according to established rules.
- **Fitness instructors (SOC 3443)**
  Deliver training in a range of fitness activities at private health and fitness centres, local authority run sports and leisure centres, other public and community establishments, and in private homes. Fitness instructors also include personal trainers and group exercise instructors.
- **Sports and leisure assistants (SOC 6211)**
  Provide and maintain facilities for sporting and recreational activities and supervise their use, maintain the continuity of entertainment and social events, offer odds and accept bets on the result of sporting and other events and control gambling activities.

1.2 Sport and physical activity SIC industries[58]

- **Sports and recreation education (SIC 8551)**
  Includes the provision of instruction in athletic activities to groups of individuals, such as by camps and schools. Overnight and day sports instruction camps are also included. It does not include academic schools, colleges and universities. Instruction may be provided in diverse settings, such as the unit's or client's training facilities, educational institutions or by other means. Instruction provided in this class is formally organised.
- **Operation of sports facilities (SIC 9311)**
  For indoor or outdoor sports events (open, closed or covered, with or without spectator seating) such as football, hockey, cricket, rugby stadiums; racetracks for car, dog, horse races; swimming pools and stadiums; track and field stadiums; winter sports arenas and stadiums; ice-hockey arenas; boxing arenas; golf courses and bowling lanes. Also, organisation and operation of outdoor or indoor sports events for professionals or amateurs by organisations with own facilities, and managing and providing the staff to operate these facilities.
- **Activities of sports clubs (SIC 9312)**
  Includes the activities of sports clubs, which, whether professional, semi-professional or amateur clubs, give their members the opportunity to engage in sporting activities.
- **Fitness facilities (SIC 9313)**
  Includes fitness and body building clubs and facilities but excludes sports instruction by individual teachers and trainers.
- **Other sports activities (SIC 9319)**
  Covers a range of activities in sport which are not classified under the industry classes above.

57 **Note:** Descriptions are adapted from UK SOC 2010

58 **Note:** Descriptions are adapted from UK SIC 2007

1.3 S&PA workforce categories (using SIC and SOC classification)

A **S&PA industry professionals:** Those working in core S&PA occupations and working in the S&PA industry (eg: fitness instructors working in dedicated fitness facilities).

B **S&PA professionals outside industry:** Those working in core S&PA occupations but outside of the S&PA industry (eg: sport and leisure assistants working in hospitality sector, such as a hotel).

C **Other jobs in S&PA industries:** Those non-core S&PA occupations working in the S&PA industry (eg: bar staff working at a sports stadium)

D **S&PA freelancers:** Those core S&PA workers who work in a freelance capacity

E **S&PA workforce (overall):** All those who work either in the S&PA industry or as an S&PA core occupation.

1.4 Limitations of the SIC and SOC taxonomy classifications

While the standard SIC and SOC taxonomies do provide useful insight, they do have their limitations in fully describing the S&PA labour market.

For example, where a sector, such as S&PA, has grown quickly and is relatively new, there can be challenges. This is because additional distinguishing details become more important in accurately defining roles and industries as the sector grows. The standard classification categories used to measure these roles can be slow to adapt to the emergence of these nuances. With roles in particular constantly evolving, these challenges are particularly acute in the SOC taxonomy, with some occupation descriptions (such as sport and leisure assistants) being quite broad, thereby risk capturing roles that are potentially beyond the specific field of interest.

A further limitation of these standard taxonomy classifications is that they typically capture only paid contractual employment roles. This is particularly acute in the case of S&PA, where, because of its history and its place in society, a lot of S&PA work is undertaken in either a voluntary or hobby capacity, with a less tangible economic presence. Traditional employment classifications fail to capture this important labour market feature.

2 CIMSPA core industry definitions (6)

2.1 Physical activity

1 **Exercise and fitness:** Services, activities and venues that predominantly improve participant physical fitness.

2 **Leisure operations:** Services, activities and venues that predominantly improve participation in physical activity.

3 **Health and wellbeing:** Holistic services and activities that promote improvements across all aspects of health, sometimes involving health care and other non-sector professionals.

2.2 Sport

4 **Performance sport:** Competitive sport and activities including those in which athletes receive payment for their performance; professional, semi-professional and grass roots sport.

5 **Community sport:** Sport/skill-based services, activities and venues that increase participation and develop skill, sometimes targeting underrepresented groups and inequalities.

6 **Adventure sport:** Activities, services and venues both indoor and outdoor improving participation in sport perceived as having a high level of risk.

3 CIMSPA alternative occupation view of S&PA sector definition

1 **Frontline:** Occupations in sport and physical activity directly servicing the needs of the participant.

2 **Support chain:** Occupations in sport and physical activity servicing the needs of the front line and/or the facilities.

3 **Extended workforce:** Enablers and influencers of sport and physical activity who are not necessarily part of the sector workforce.

4 Lightcast data and methodology

Lightcast brings together different data sources to create a robust composite dataset that provides labour market intelligence on hundreds of industries and occupations at the lowest geographic levels. By joining together these datasets, Lightcast can provide unique insights into the relationship between industry trends and associated occupations requirements.

4.1 Official datasets used by Lightcast

Lightcast builds the data from eight different government data sources, each describing different aspects of the labour market that in isolation only tell part of the story or contain inherent weaknesses, but when modelled together provide a more holistic and robust view of the labour market. These eight data sources are:

A ONS Annual Business Inquiry

B ONS Annual Population Survey (APS)

C ONS Annual Survey of Hours and Earnings

D ONS Business Register & Employment Survey (BRES)

E DEFRA Statistics

F ONS Labour Force Survey (LFS)

G UKCES Working Futures

H ONS Workforce Job Series

4.2 Job postings data

Alongside data from official data sources, Lightcast has its own proprietary data on job postings. This dataset contains over 80 million job postings for the UK, collected since 2012.

Online job postings data provides insights into labour market trends that are complementary to traditional data. Lightcast job postings library is built by scraping on a daily basis over 1,000 online job boards, newspapers and employer sites. The job ads are then deduplicated to ensure only one posting is counted for each opening, regardless of how many places it is advertised in. The job postings are then classified by location, employer, occupation, skills required and any other type of relevant information that can be extracted from the ad.

Compared to traditional data sources, job postings data allows for a detailed, real-time look at the labour market and what employers need. However, the data is dependent on employers advertising their openings online, which is more popular for some jobs and job types than others.

Key job posting terms:

- **Unique job postings:** the number of deduplicated job vacancy advertisements.
- **Advertised salary:** is the salary information provided by the company or entity advertising the position.
- **Job postings to jobs ratio:** is the number of unique job postings to official job numbers. It is typically used to get an indication of labour market dynamism, with a higher ratio suggesting either rapid growth of additional jobs or labour market churn.
- **Posting intensity:** is the ratio of total to unique job postings. A higher than average posting intensity can mean that employers are putting more effort than normal into hiring that position.
- **Posting duration:** the number of days a job posting is live and accepting applicants.

4.3 Automation index

To examine the extent to which automation and technological advancement may disrupt or change work activities, Lightcast has developed a UK Automation Index (AI). The index examines the proportion of working time spent in each occupation performing tasks which are deemed to be 'high-risk' of disruption through automation and other technological change anticipated over the next 20 to 30 years.

4.4 Regional specialisation: location quotient methodology

To determine the relative specialisations of different regions in specific occupations or occupational groups, Lightcast uses location quotients. This metric quantifies how concentrated a particular industry or occupation is in a region compared to the national average. A value above 1 means a particular occupational group is more concentrated at the 'local' level than at the national level.

4.5 Lightcast career pathways model

Lightcast career pathway model is a tool that provides a visual representation of the job ecosystem, mapping out how jobs are related to one another and identifying potential career paths and opportunities for advancement. The Career Pathways model utilises skills data from job postings to connect workers with the most related job opportunities.

4.6 Lightcast staffing patterns matrix

Staffing patterns show the occupational makeup of an industry in percentages. Similarly, Lightcast's inverse staffing patterns identify the industries currently employing a specific occupation.

4.7 Calculating freelance estimates

Lightcast data on jobs is estimated from counts in ONS BRES, which includes jobs from local units Registered for VAT or PAYE. This includes proprietors who own the enterprise as well as jobs, but does not include freelance self-employed outside of VAT and PAYE compliance requirements. To account for that additional number, the research uses data from the ONS Annual Population Survey (APS) summarised on the Nomis table Regional — Occupation by Sex by Employment Type. This data (Jan-Dec each year) was then integrated with the Lightcast data on jobs, netting the Nomis self-employment category from the Lightcast proprietor category to obtain an estimate of 'Freelance' employment. An important caveat when interpreting the Data is that BRES data is 'jobs'-based, whereas Annual Population Survey data is 'employee'-based, on the basis of primary occupation; one employee can have more than one job, but only one primary occupation. The assumption is made that primary self-employment is consistent with appearance as a BRES proprietor.

5 Lightcast skills

5.1 Lightcast open skills taxonomy

The open skills taxonomy is an open-source taxonomy of 32,000+ skills gathered from hundreds of millions of online job postings, profiles, and resumes—updated every two weeks. The skills are tagged across Lightcast's entire data ecosystem, allowing the examination of how skills relate to one another as well as the top skills by job titles, occupations, industries, companies, regions, and keywords.

5.2 Skill types

1. **Transferable skills** – these are typically transferable skills prevalent across many different industries and include personal attributes, behaviours, competencies, and learned skills.
2. **Specialised skills** – these are skills unique to a task or ones that are primarily sought after within a subset of occupations.
3. **Software skills** – a subset of specialised skills, these include specific computer programs and programming skills requested in job postings.

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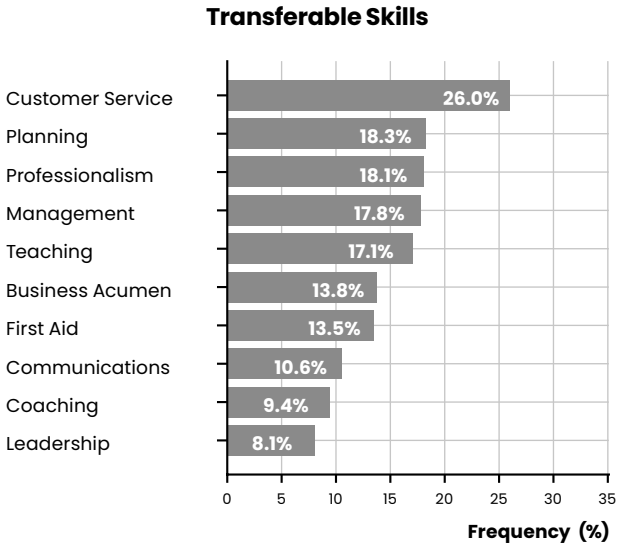
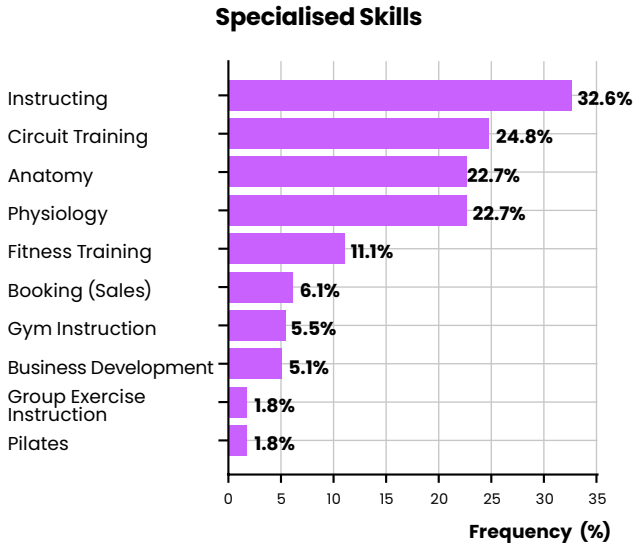
Annex 2
Skills factsheets for sport and physical activity occupations

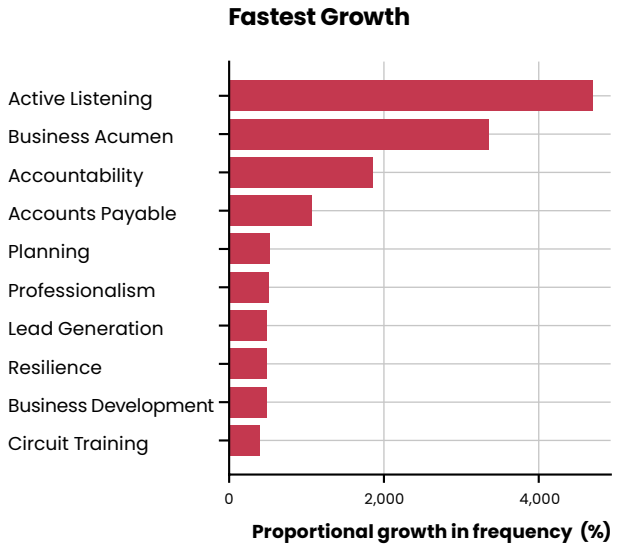
(Top 10 common, specialised and fastest growing skills)[59]

59 **Note:** Fastest growing skills appear in at least 1% of relevant postings in 2022

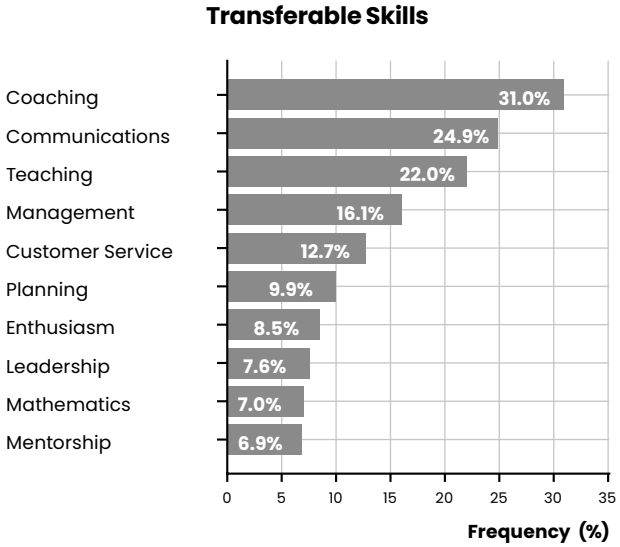
Fitness instructors

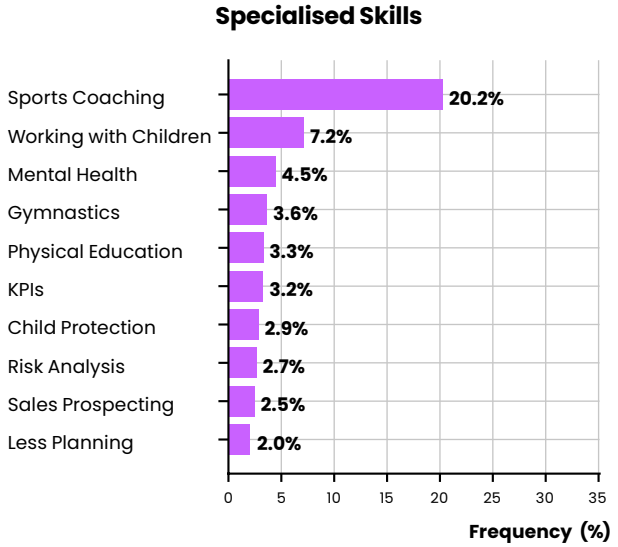


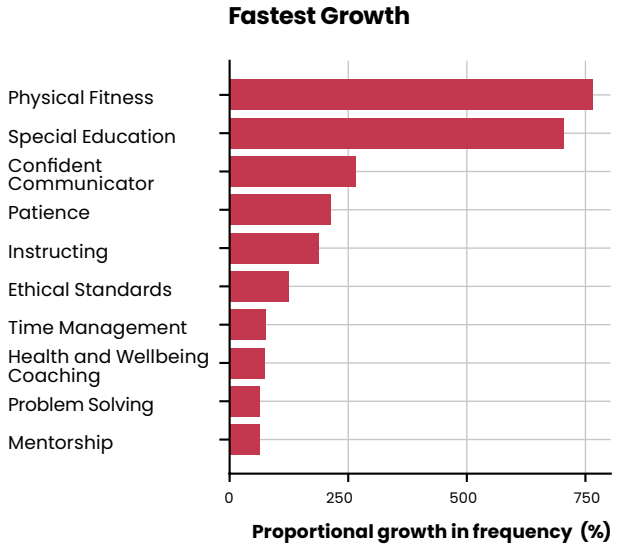




Sports coaches, instructors, and officials

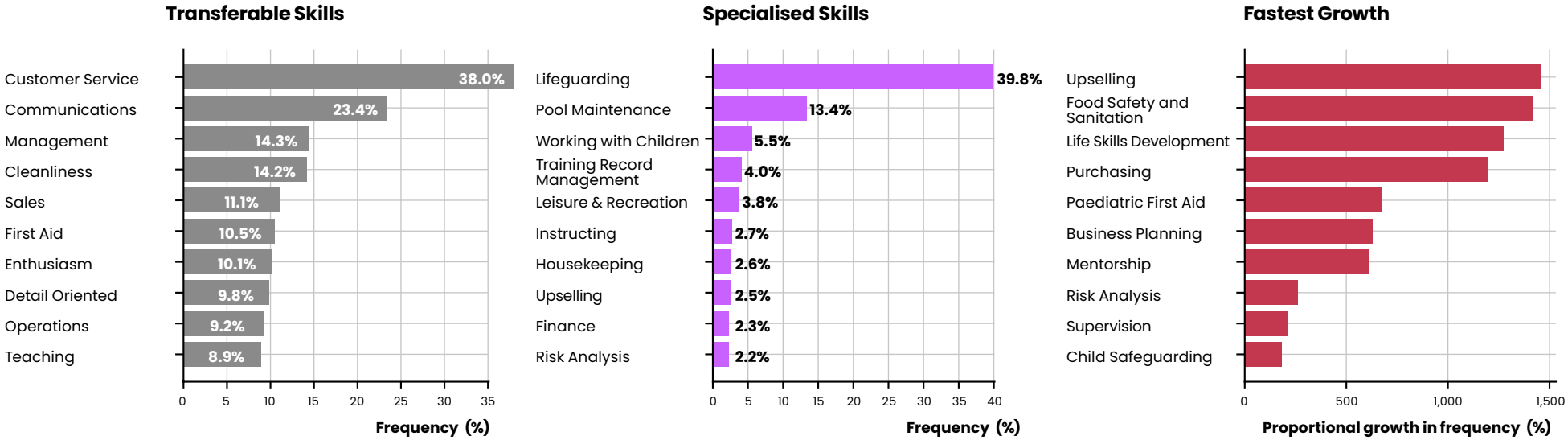




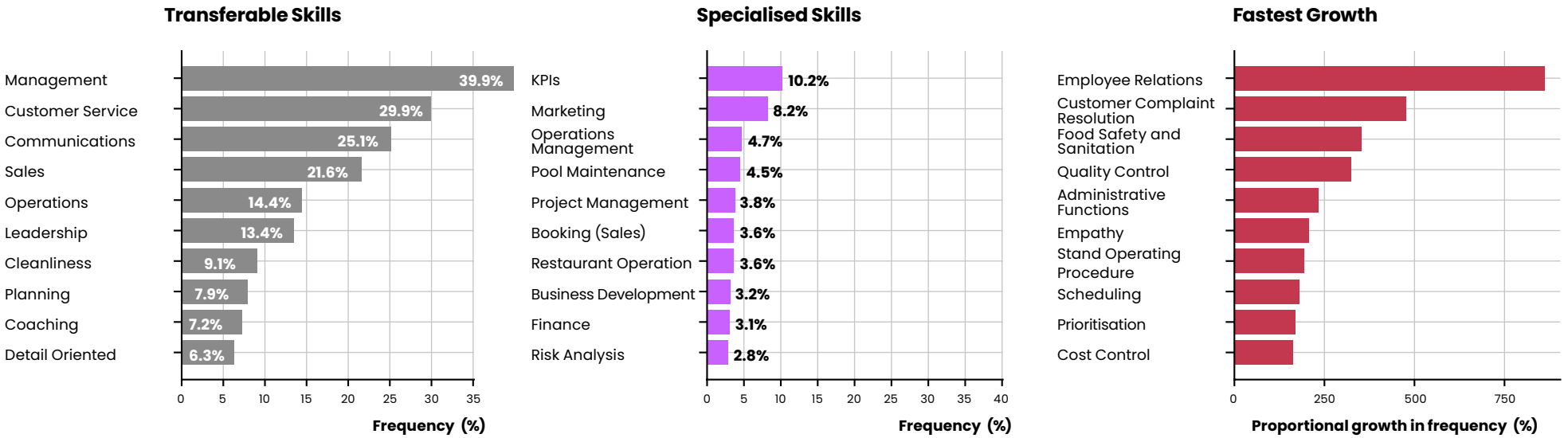


Source: Lightcast job postings

Sport and leisure assistants



Leisure and sport managers



Source: Lightcast job postings

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Annex 3
Regional job postings dashboards for sport and physical activity occupations[60]

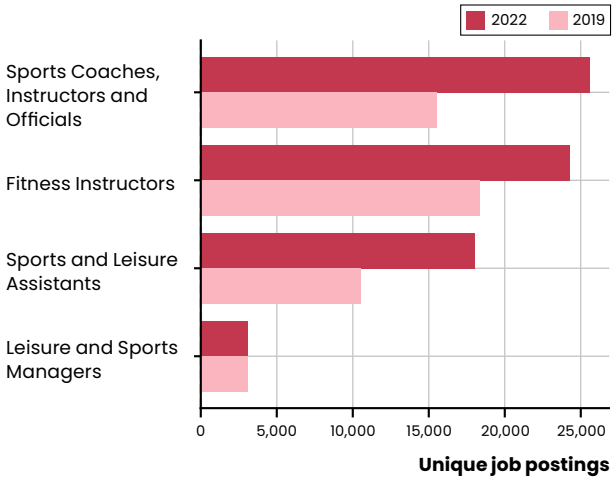
These regional dashboards are presented as follows:

- The UK overall
- The four nations of the UK – England, Scotland, Wales and Northern Ireland
- The nine broad NUTS1 regions of England

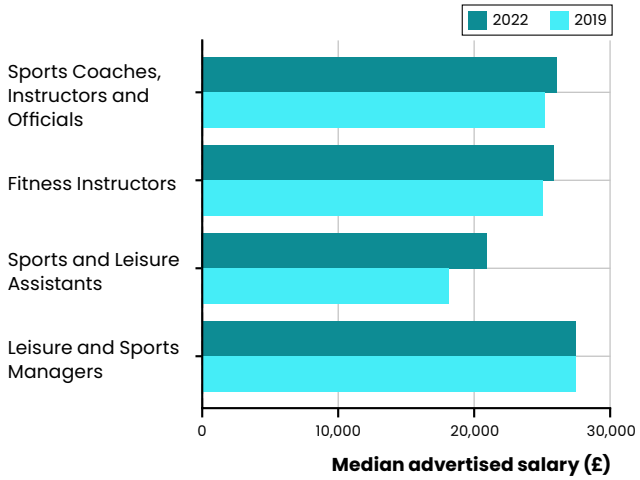
60 **Note:** Caution is advised when interpreting median advertised salary information for the specific S&PA occupations at the regional level owing to relatively small sample size

United Kingdom
Job postings dashboard

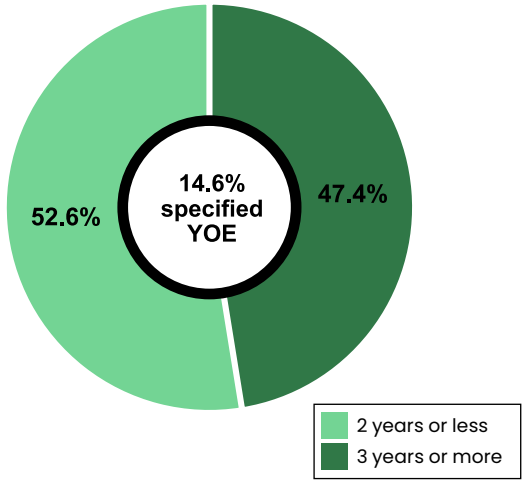
Changes in recruitment activity
S&PA occupations | SOC4



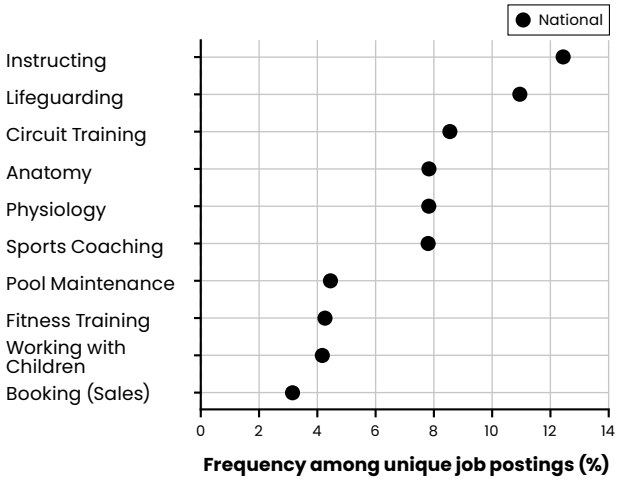
Changes in median advertised salaries
S&PA occupations | SOC4



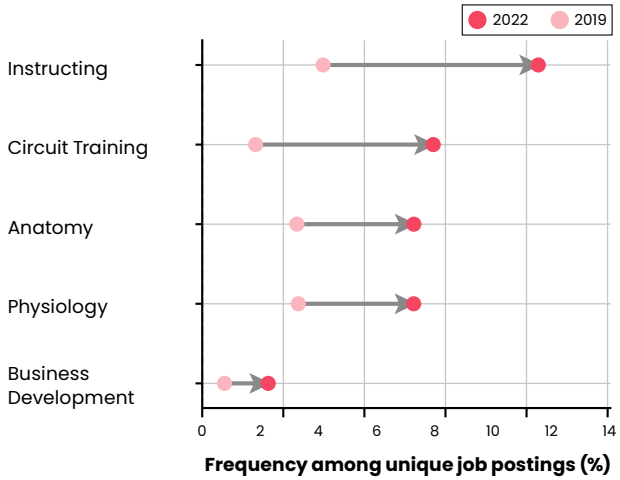
Minimum years of experience
2022 | S&PA occupations



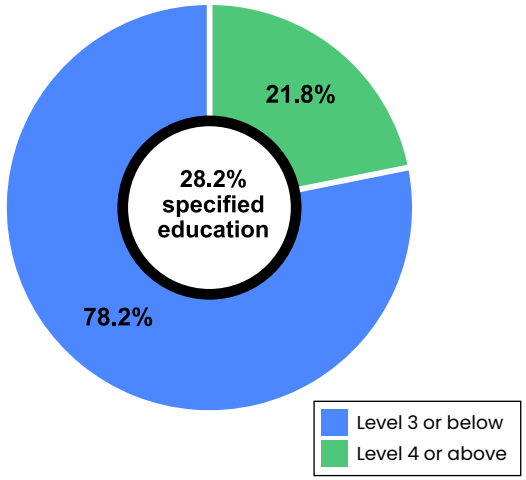
Most in demand specialised skills
2022 | S&PA occupations | SOC4



Fastest growing specialised skills
2019-2022 | S&PA occupations | SOC4 | % increase



Education levels
2022 | S&PA occupations



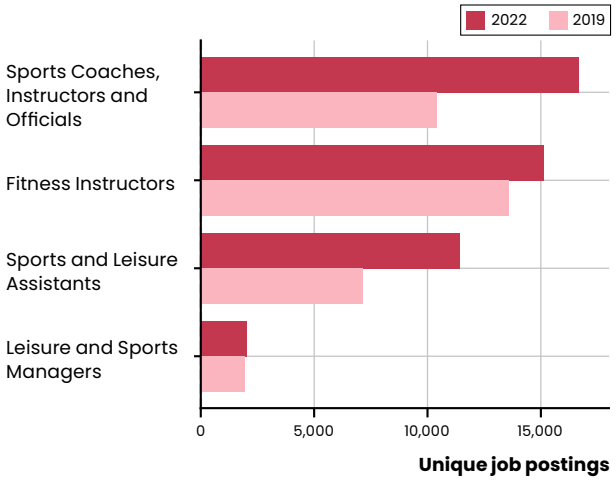
Source: Lightcast job postings

England

Job postings dashboard

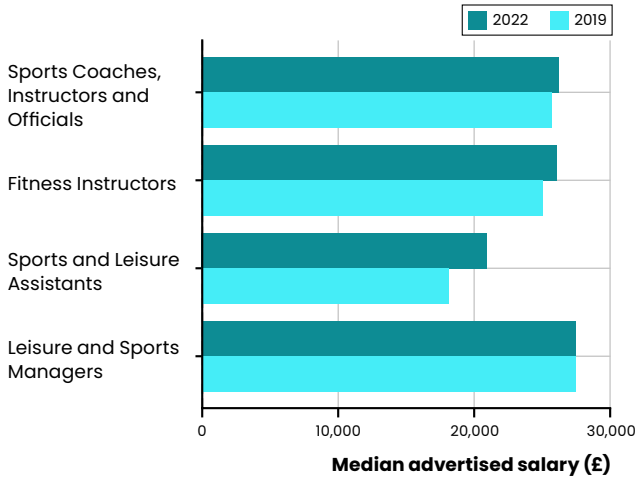
Changes in recruitment activity

S&PA occupations | SOC4



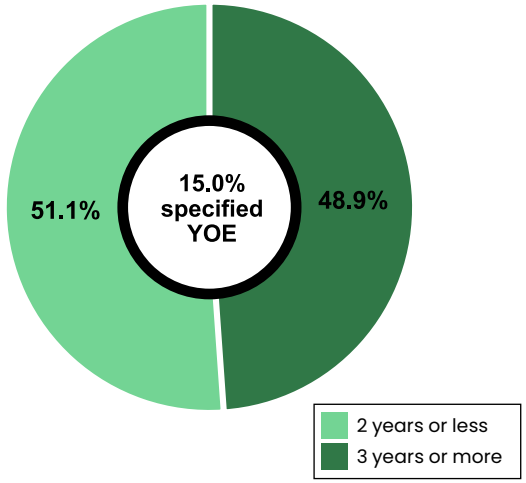
Changes in median advertised salaries

S&PA occupations | SOC4



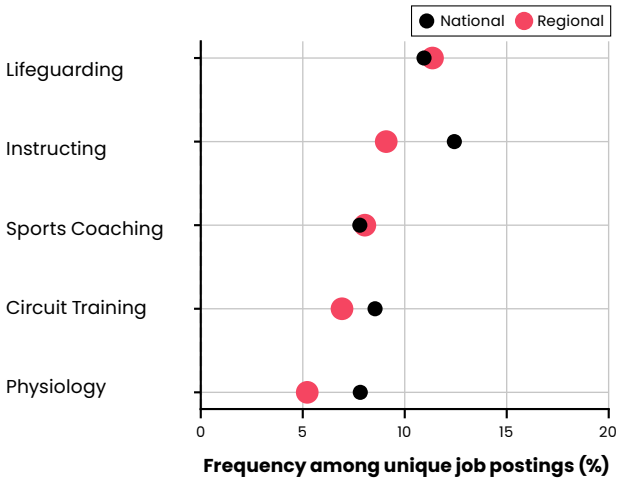
Minimum years of experience

2022 | S&PA occupations



Most in demand specialised skills

2022 | S&PA occupations | SOC4

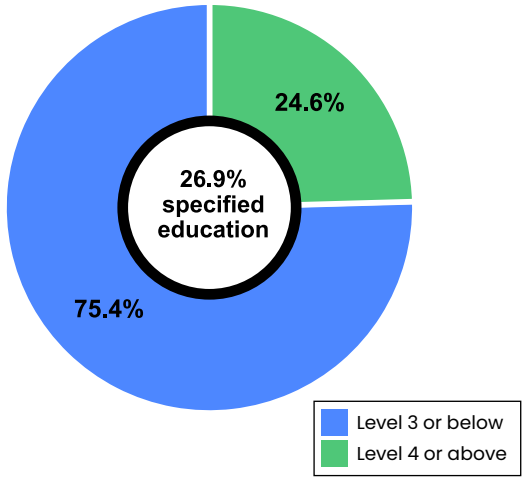


Fastest growing specialised skills

2019-2022 | S&PA occupations | SOC4 | % increase

Education levels

2022 | S&PA occupations



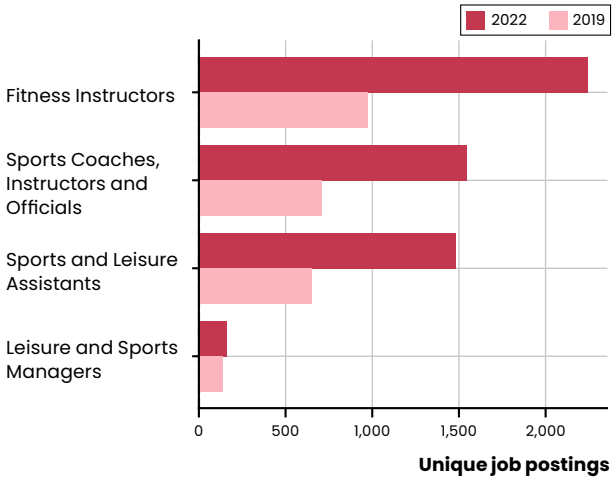
Source: Lightcast job postings

Scotland

Job postings dashboard

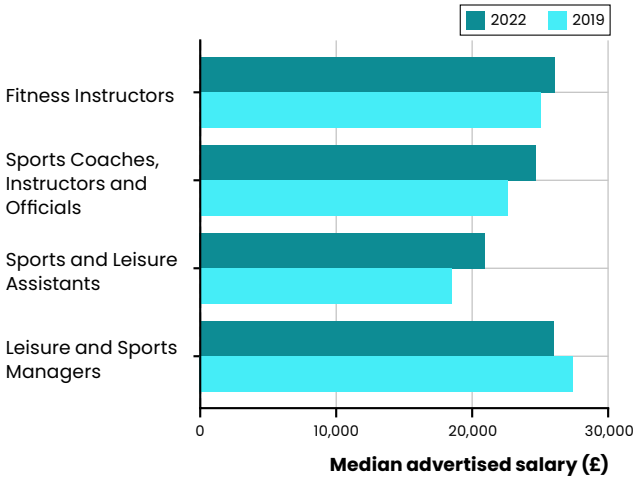
Changes in recruitment activity

S&PA occupations | SOC4



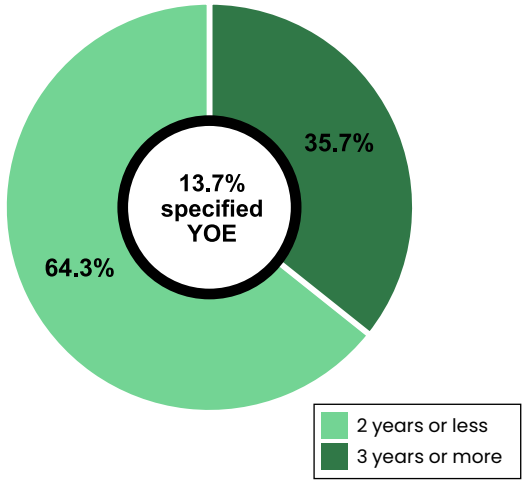
Changes in median advertised salaries

S&PA occupations | SOC4



Minimum years of experience

2022 | S&PA occupations



Most in demand specialised skills

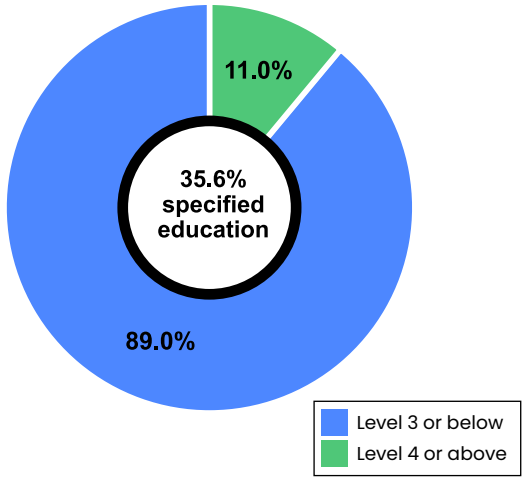
2022 | S&PA occupations | SOC4

Fastest growing specialised skills

2019-2022 | S&PA occupations | SOC4 | % increase

Education levels

2022 | S&PA occupations



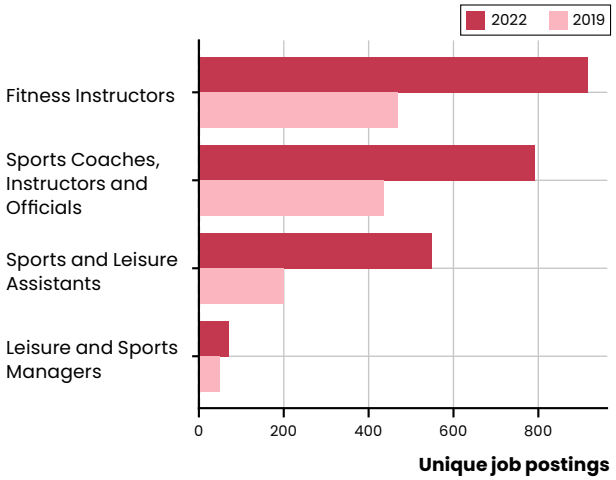
Source: Lightcast job postings

Wales

Job postings dashboard

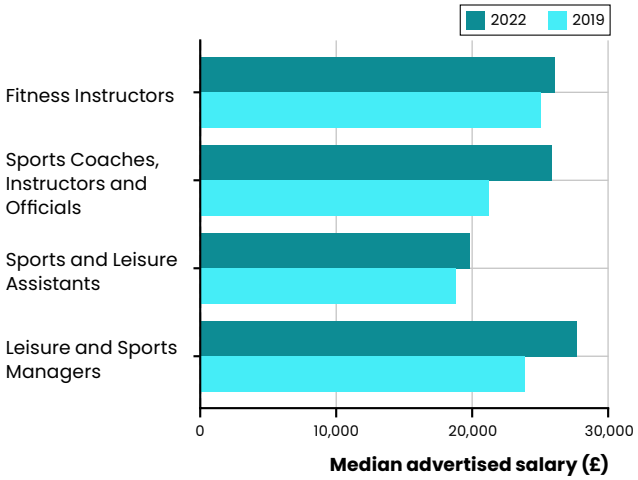
Changes in recruitment activity

S&PA occupations | SOC4



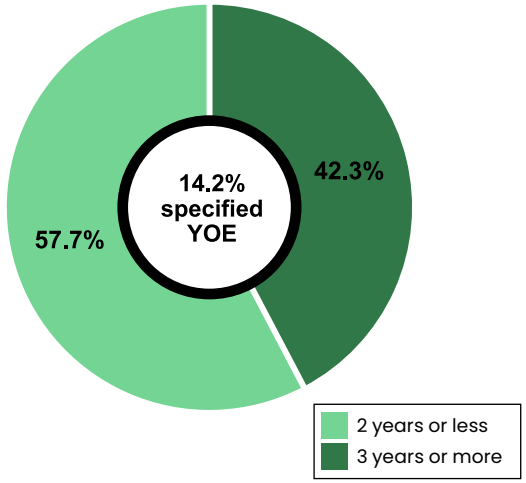
Changes in median advertised salaries

S&PA occupations | SOC4



Minimum years of experience

2022 | S&PA occupations



Most in demand specialised skills

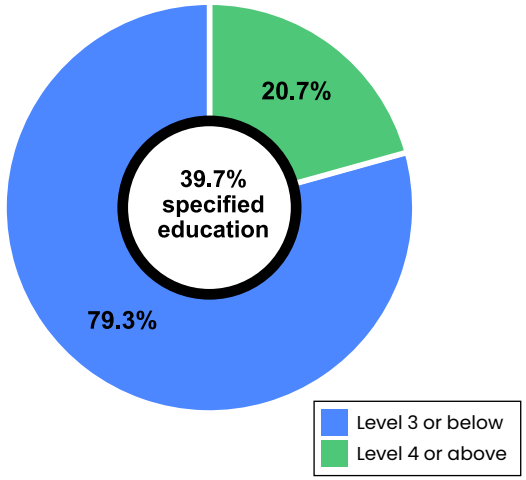
2022 | S&PA occupations | SOC4

Fastest growing specialised skills

2019-2022 | S&PA occupations | SOC4 | % increase

Education levels

2022 | S&PA occupations



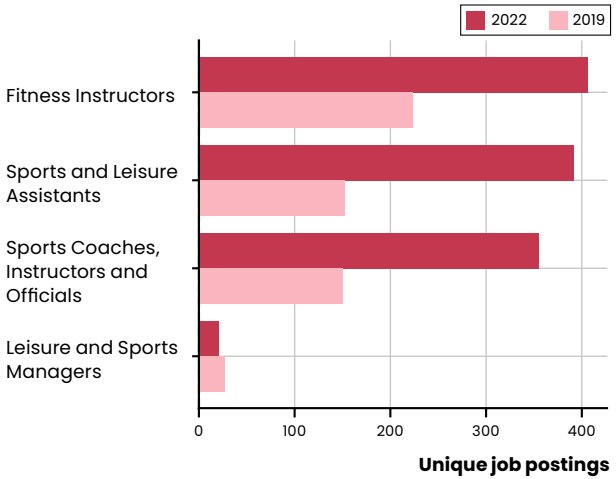
Source: Lightcast job postings

Northern Ireland

Job postings dashboard

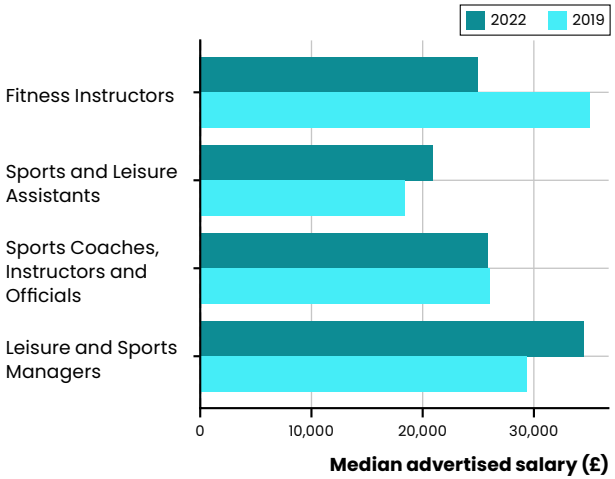
Changes in recruitment activity

S&PA occupations | SOC4



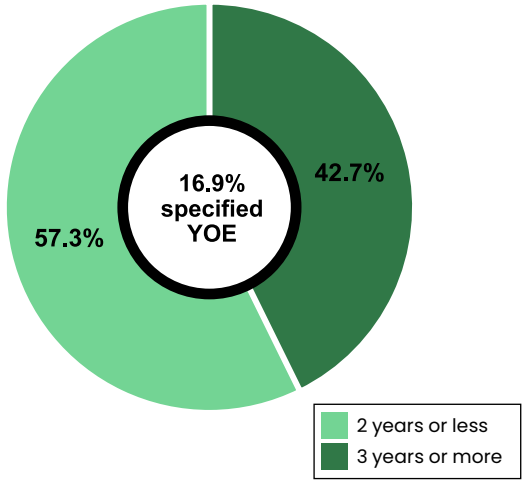
Changes in median advertised salaries

S&PA occupations | SOC4



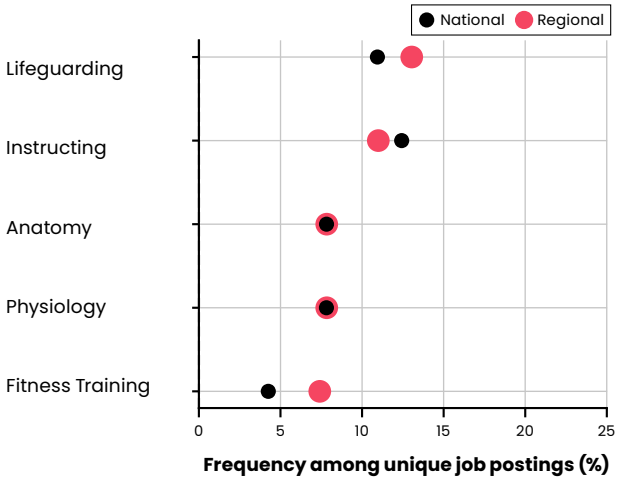
Minimum years of experience

2022 | S&PA occupations



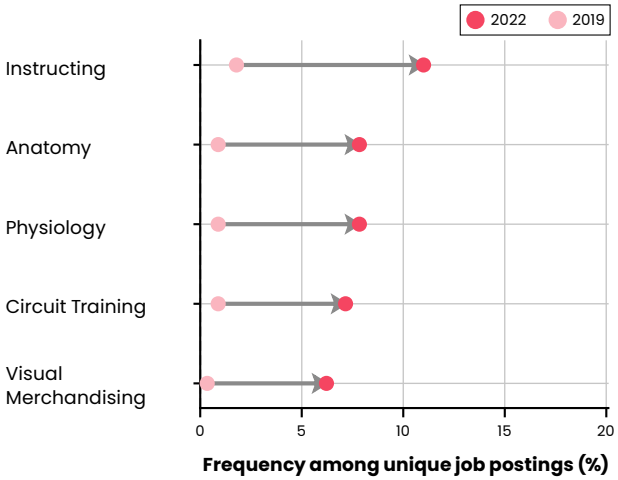
Most in demand specialised skills

2022 | S&PA occupations | SOC4



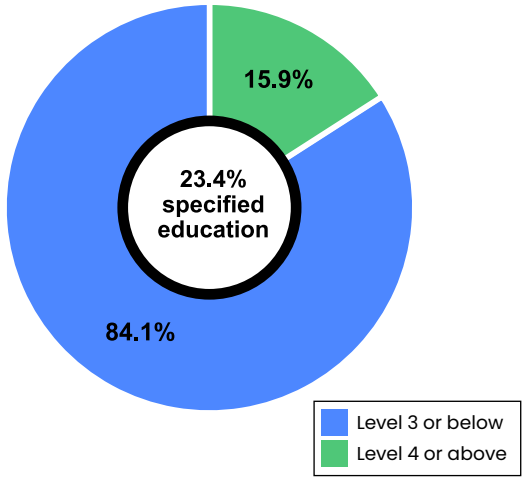
Fastest growing specialised skills

2019-2022 | S&PA occupations | SOC4 | % increase



Education levels

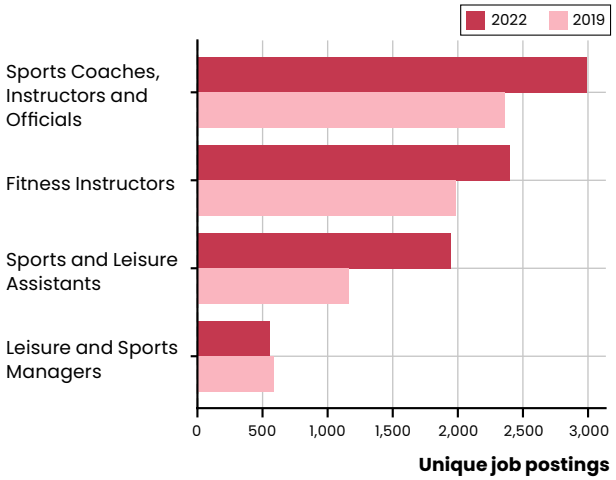
2022 | S&PA occupations



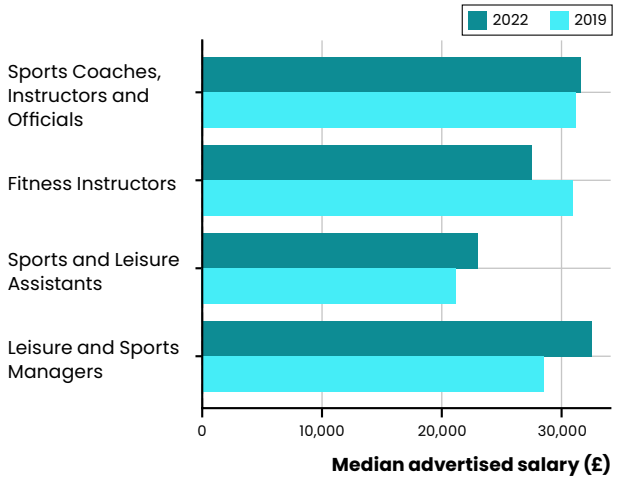
Source: Lightcast job postings

London
Job postings dashboard

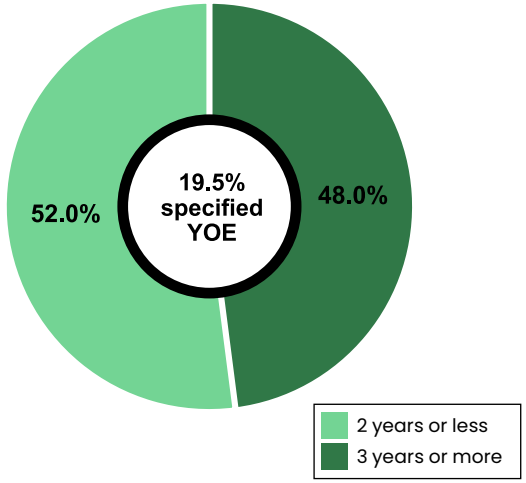
Changes in recruitment activity
S&PA occupations | SOC4



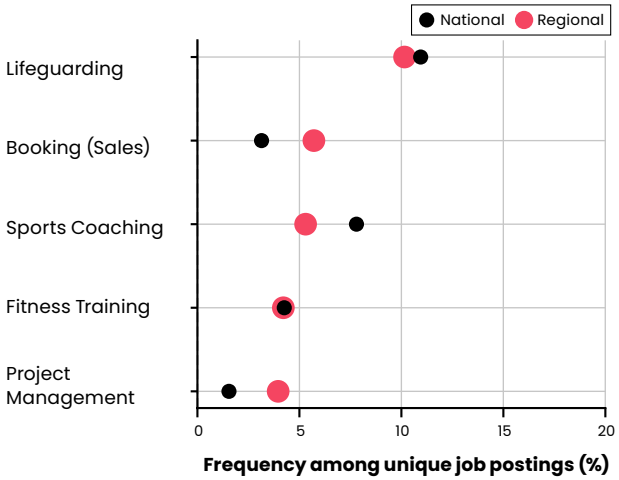
Changes in median advertised salaries
S&PA occupations | SOC4



Minimum years of experience
2022 | S&PA occupations

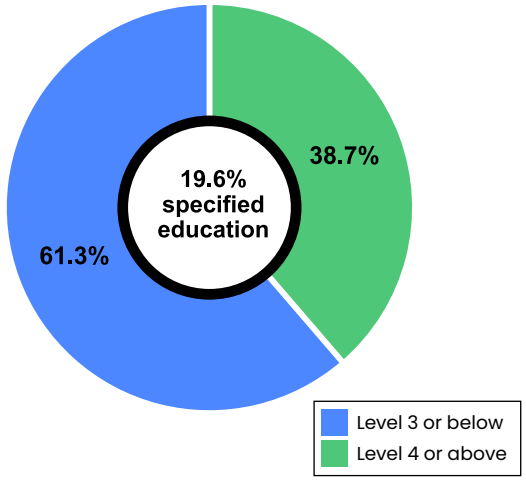


Most in demand specialised skills
2022 | S&PA occupations | SOC4



Fastest growing specialised skills
2019-2022 | S&PA occupations | SOC4 | % increase

Education levels
2022 | S&PA occupations



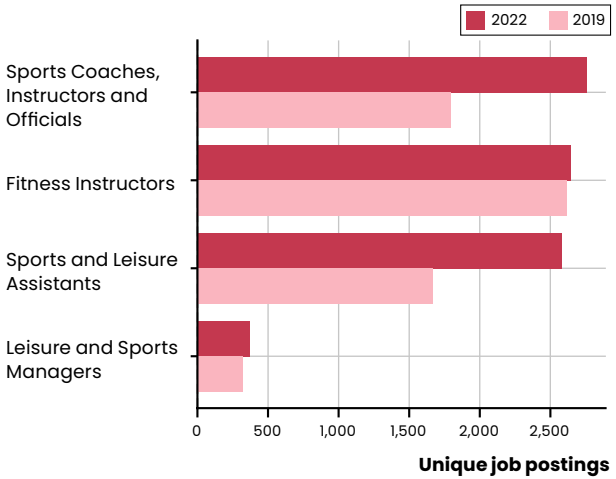
Source: Lightcast job postings

South East

Job postings dashboard

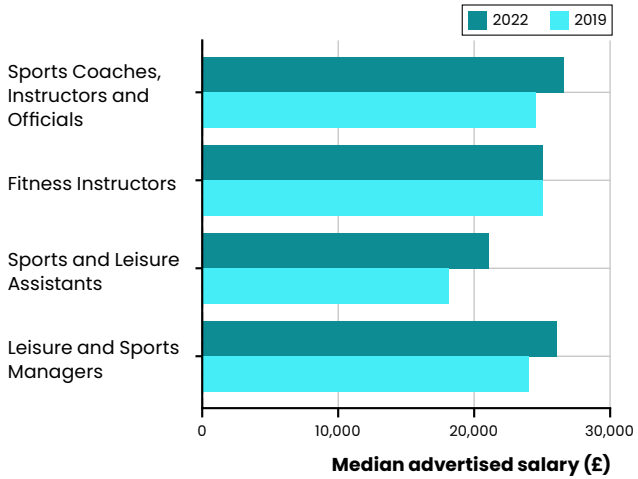
Changes in recruitment activity

S&PA occupations | SOC4



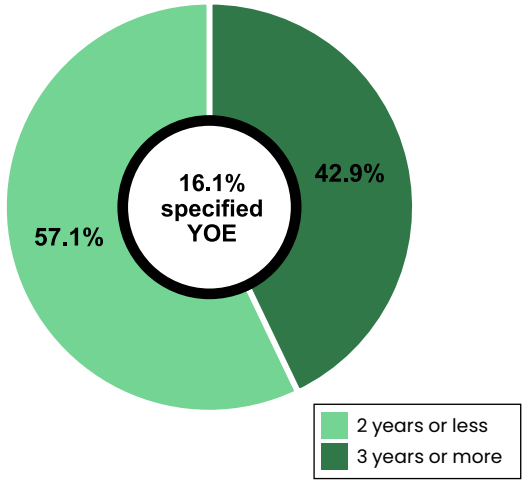
Changes in median advertised salaries

S&PA occupations | SOC4



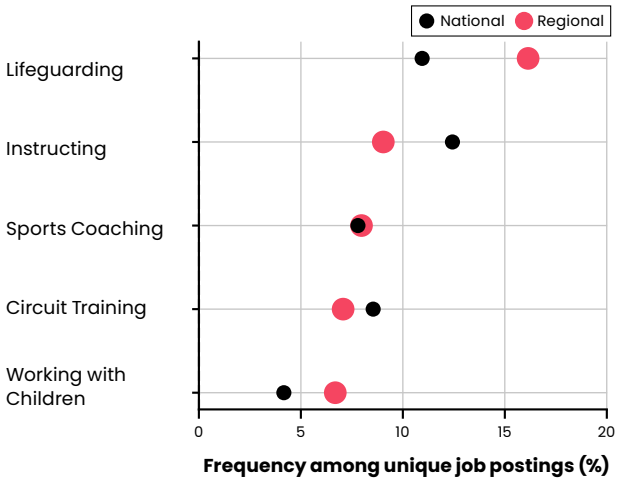
Minimum years of experience

2022 | S&PA occupations



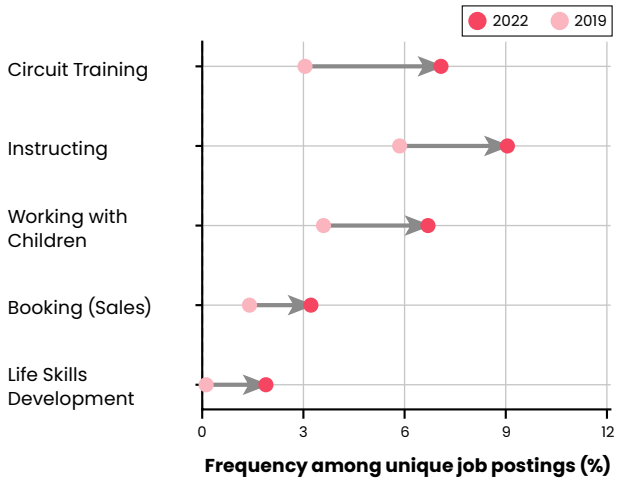
Most in demand specialised skills

2022 | S&PA occupations | SOC4



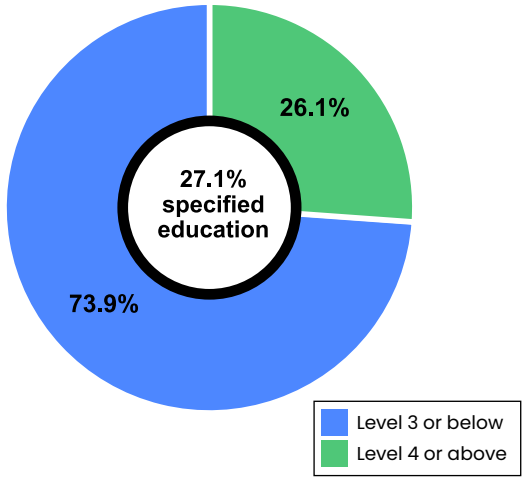
Fastest growing specialised skills

2019-2022 | S&PA occupations | SOC4 | % increase



Education levels

2022 | S&PA occupations



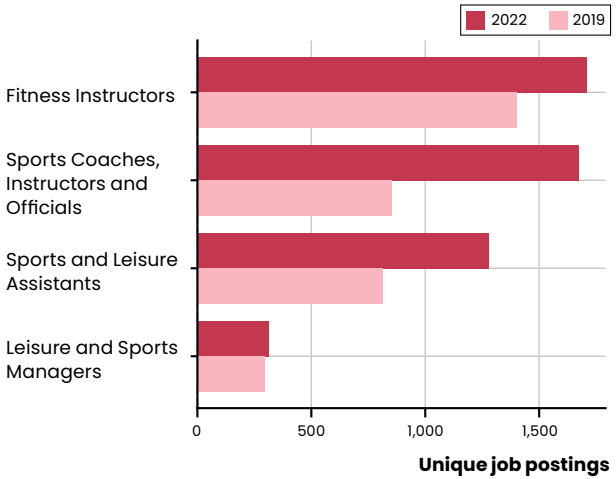
Source: Lightcast job postings

South West

Job postings dashboard

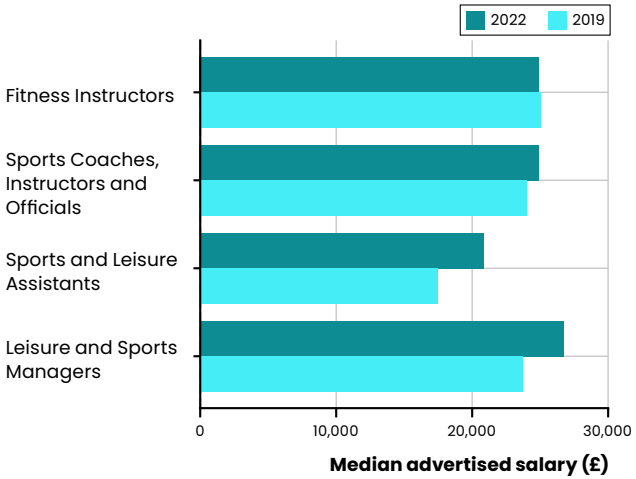
Changes in recruitment activity

S&PA occupations | SOC4



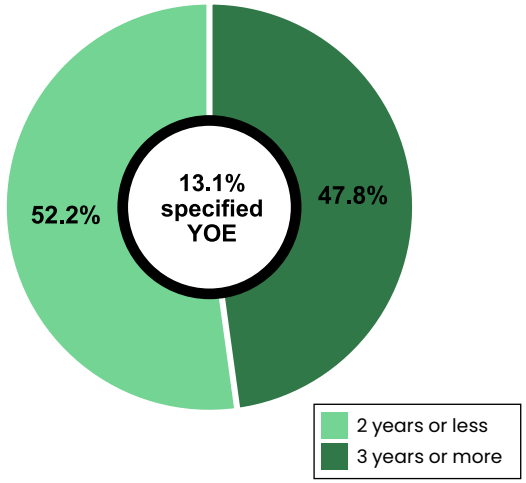
Changes in median advertised salaries

S&PA occupations | SOC4



Minimum years of experience

2022 | S&PA occupations

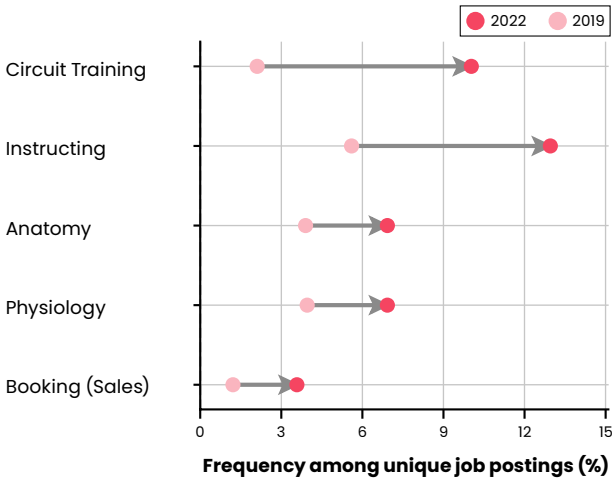


Most in demand specialised skills

2022 | S&PA occupations | SOC4

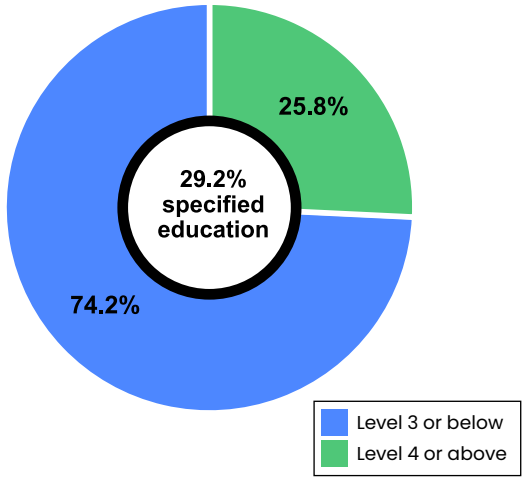
Fastest growing specialised skills

2019-2022 | S&PA occupations | SOC4 | % increase



Education levels

2022 | S&PA occupations



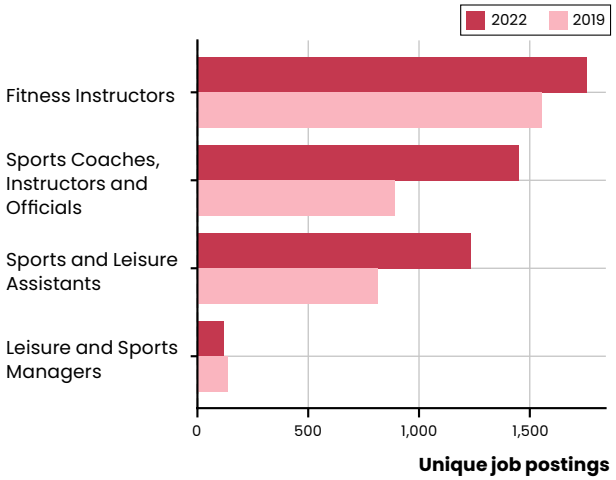
Source: Lightcast job postings

East of England

Job postings dashboard

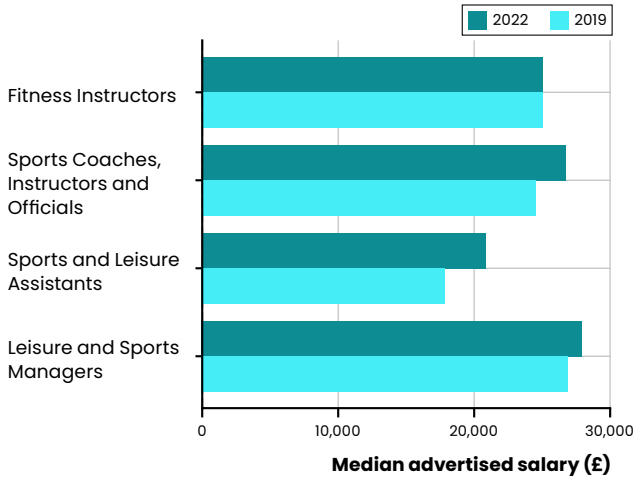
Changes in recruitment activity

S&PA occupations | SOC4



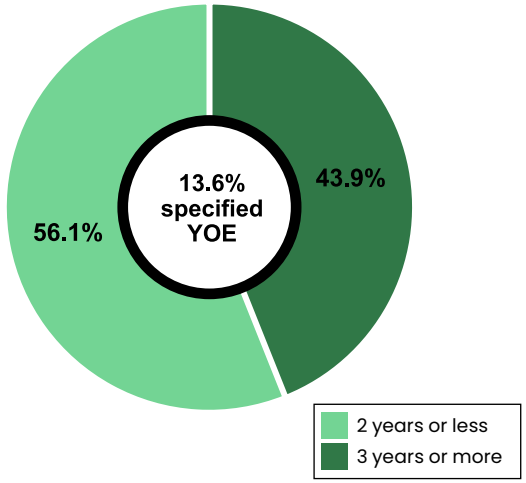
Changes in median advertised salaries

S&PA occupations | SOC4



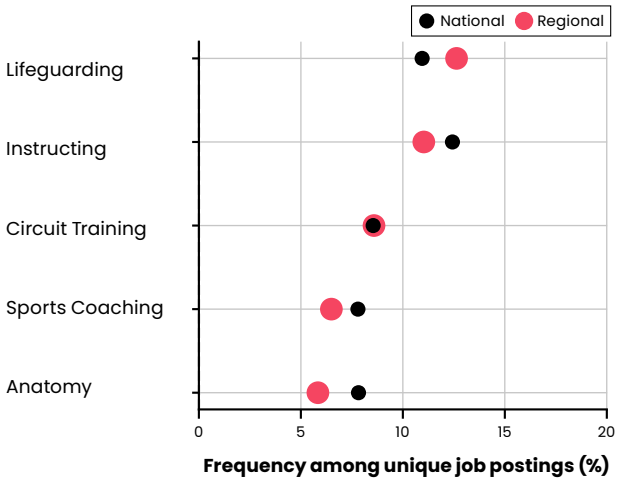
Minimum years of experience

2022 | S&PA occupations



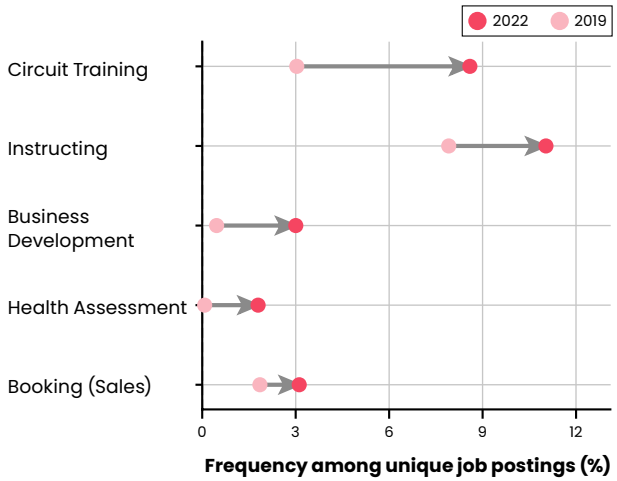
Most in demand specialised skills

2022 | S&PA occupations | SOC4



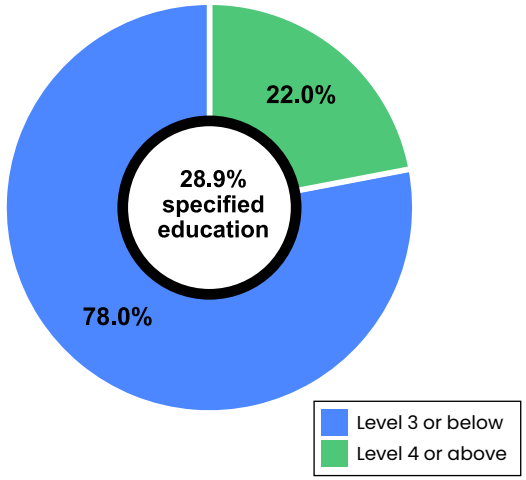
Fastest growing specialised skills

2019-2022 | S&PA occupations | SOC4 | % increase



Education levels

2022 | S&PA occupations



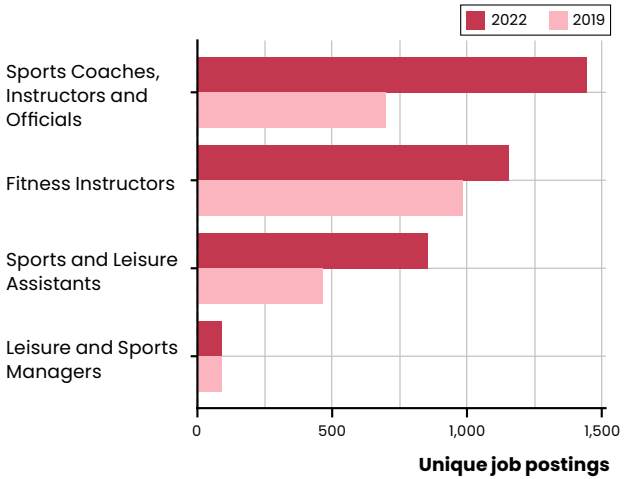
Source: Lightcast job postings

East Midlands

Job postings dashboard

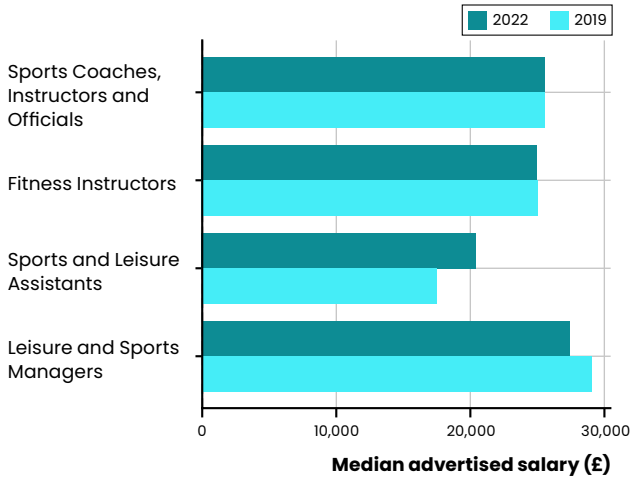
Changes in recruitment activity

S&PA occupations | SOC4



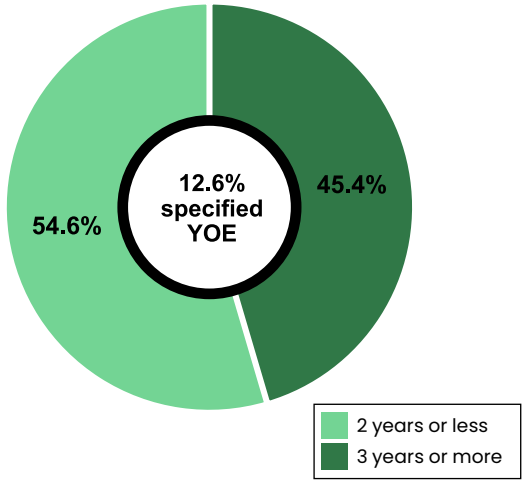
Changes in median advertised salaries

S&PA occupations | SOC4



Minimum years of experience

2022 | S&PA occupations

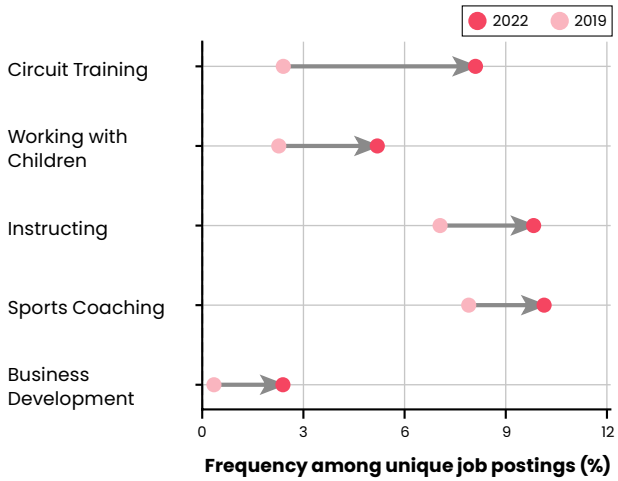


Most in demand specialised skills

2022 | S&PA occupations | SOC4

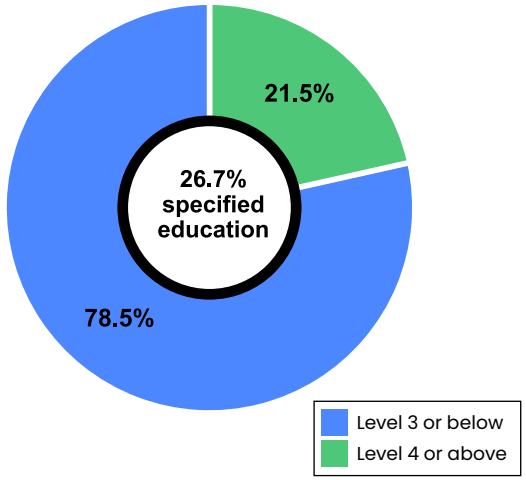
Fastest growing specialised skills

2019-2022 | S&PA occupations | SOC4 | % increase



Education levels

2022 | S&PA occupations



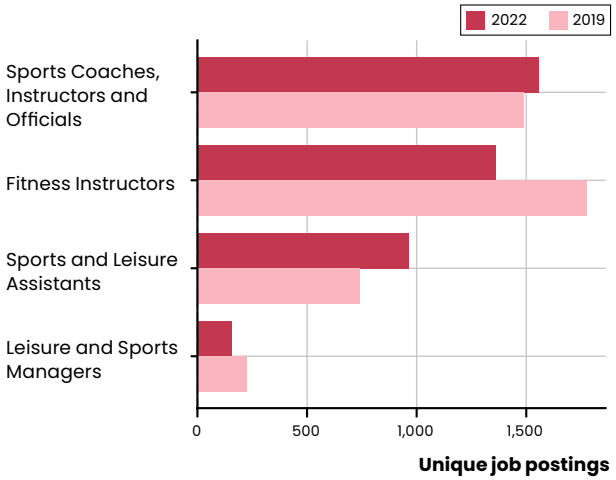
Source: Lightcast job postings

West Midlands

Job postings dashboard

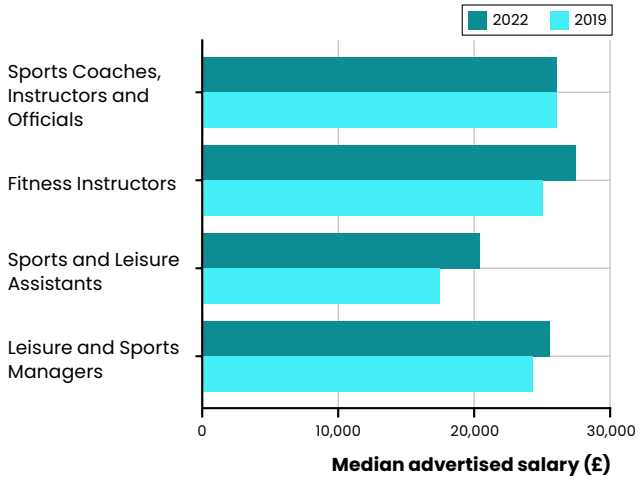
Changes in recruitment activity

S&PA occupations | SOC4



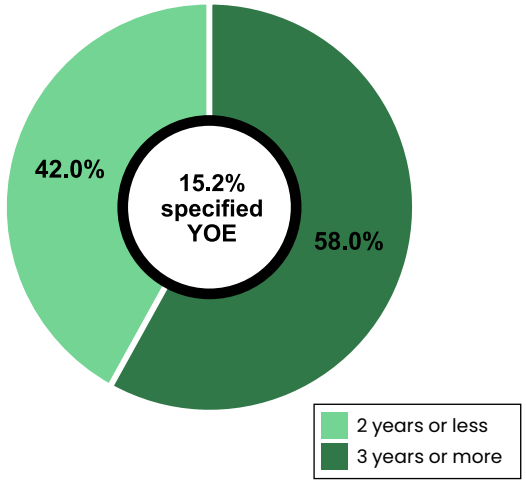
Changes in median advertised salaries

S&PA occupations | SOC4



Minimum years of experience

2022 | S&PA occupations

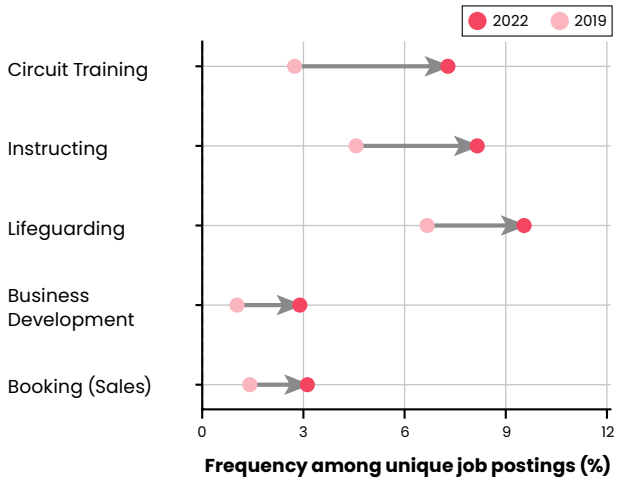


Most in demand specialised skills

2022 | S&PA occupations | SOC4

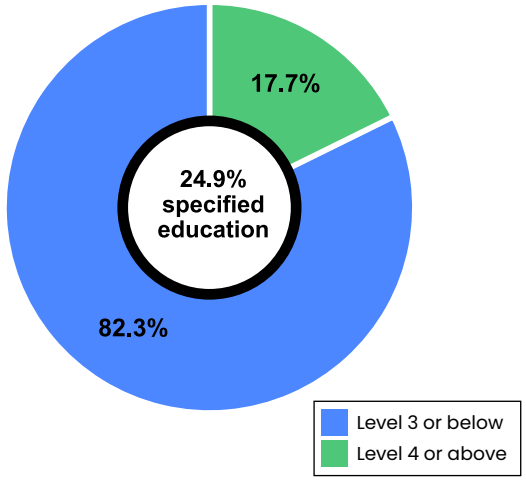
Fastest growing specialised skills

2019-2022 | S&PA occupations | SOC4 | % increase



Education levels

2022 | S&PA occupations



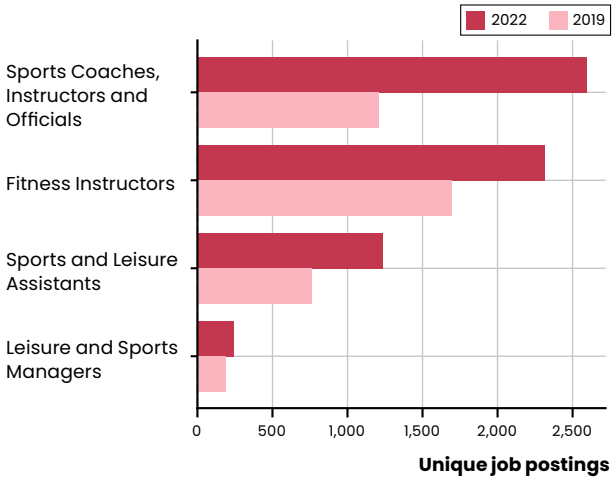
Source: Lightcast job postings

North West

Job postings dashboard

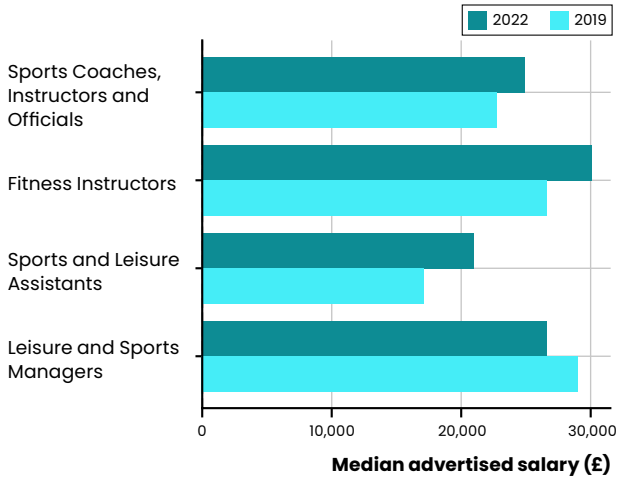
Changes in recruitment activity

S&PA occupations | SOC4



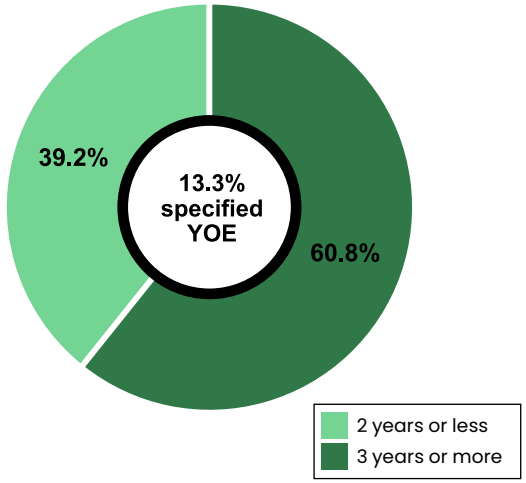
Changes in median advertised salaries

S&PA occupations | SOC4



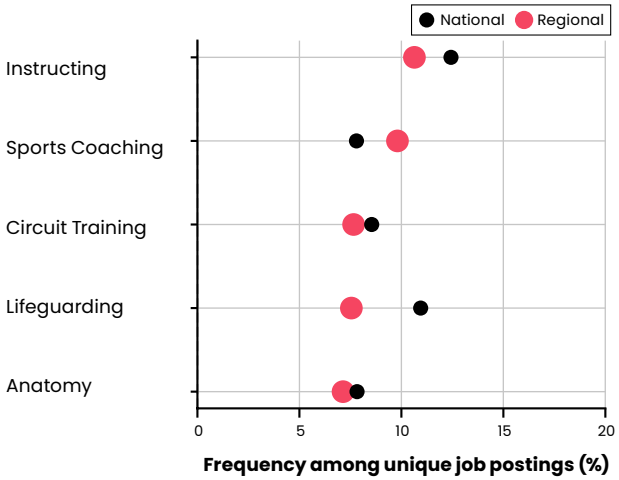
Minimum years of experience

2022 | S&PA occupations



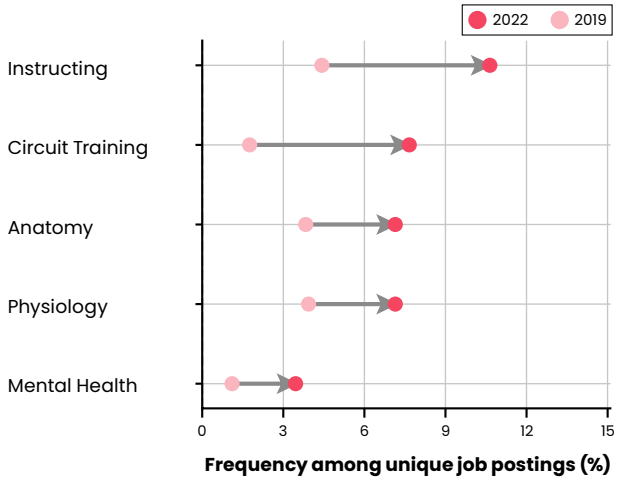
Most in demand specialised skills

2022 | S&PA occupations | SOC4



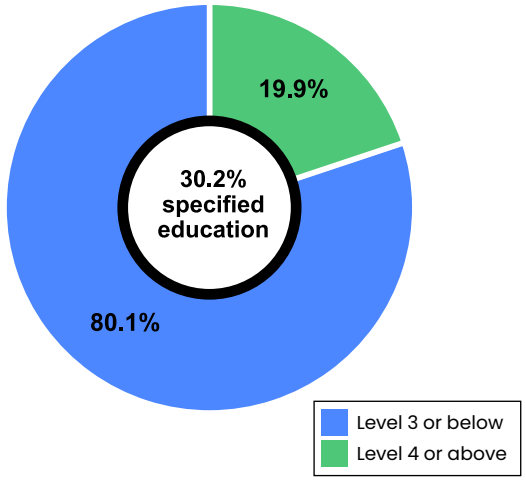
Fastest growing specialised skills

2019-2022 | S&PA occupations | SOC4 | % increase



Education levels

2022 | S&PA occupations



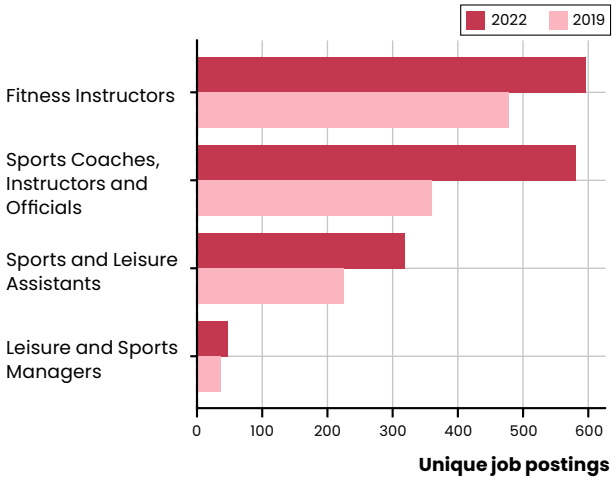
Source: Lightcast job postings

North East

Job postings dashboard

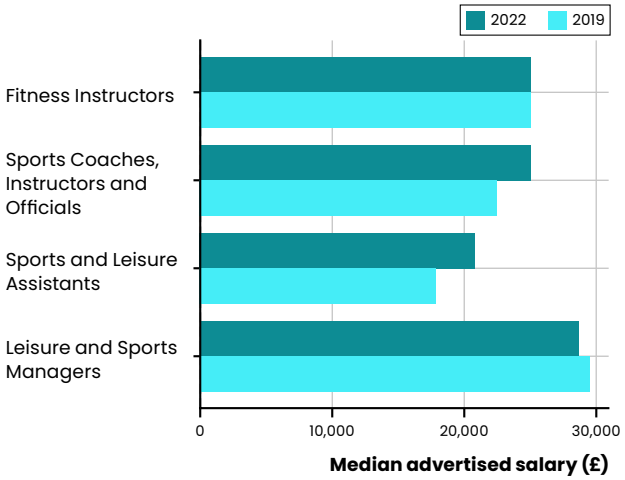
Changes in recruitment activity

S&PA occupations | SOC4



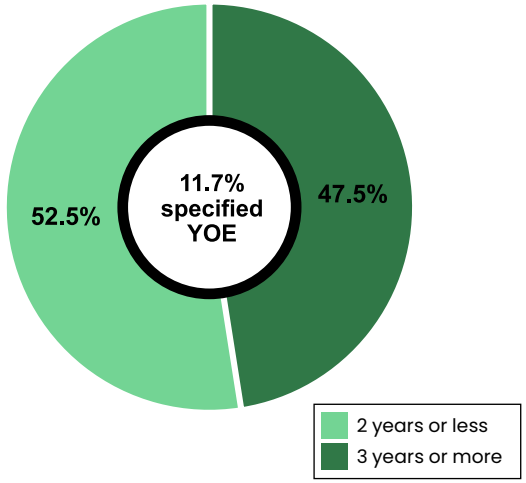
Changes in median advertised salaries

S&PA occupations | SOC4



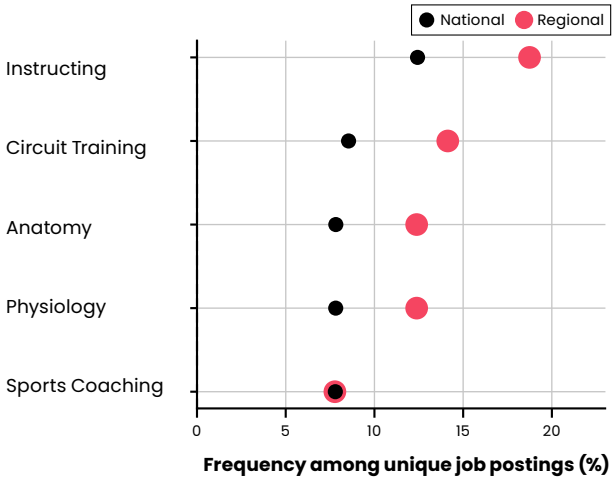
Minimum years of experience

2022 | S&PA occupations



Most in demand specialised skills

2022 | S&PA occupations | SOC4

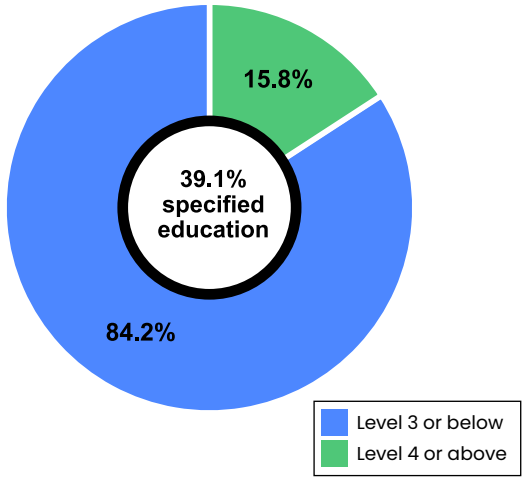


Fastest growing specialised skills

2019-2022 | S&PA occupations | SOC4 | % increase

Education levels

2022 | S&PA occupations



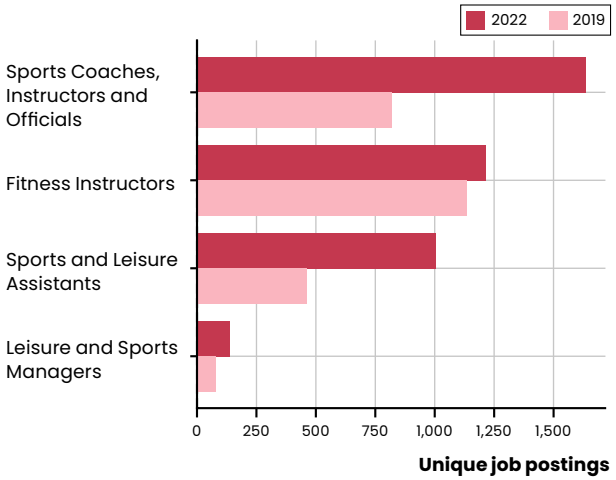
Source: Lightcast job postings

Yorkshire and The Humber

Job postings dashboard

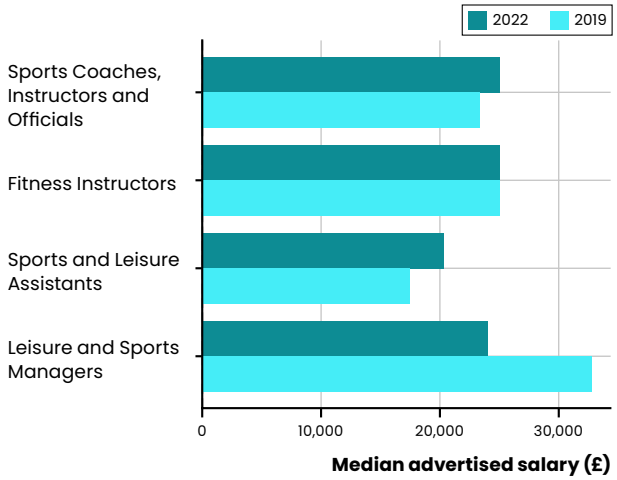
Changes in recruitment activity

S&PA occupations | SOC4



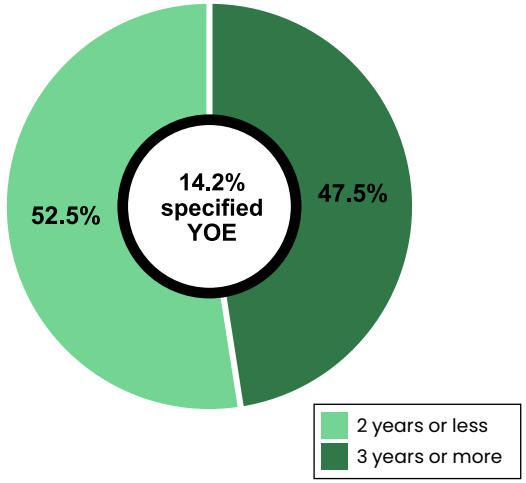
Changes in median advertised salaries

S&PA occupations | SOC4



Minimum years of experience

2022 | S&PA occupations

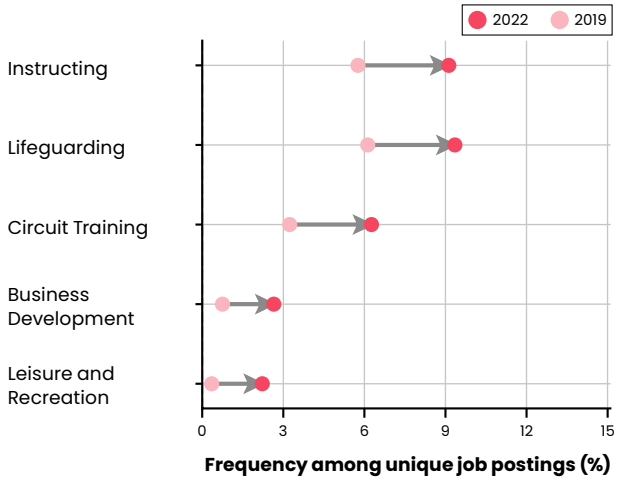


Most in demand specialised skills

2022 | S&PA occupations | SOC4

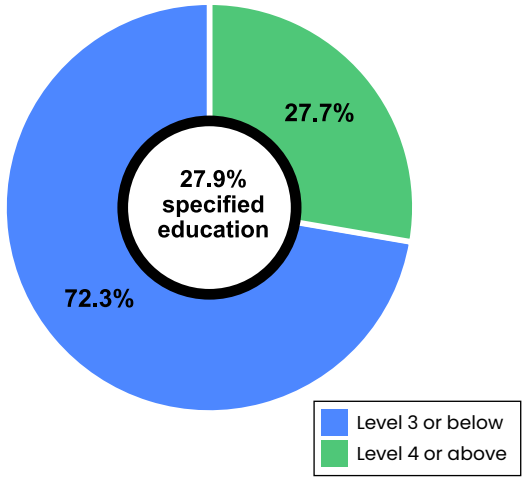
Fastest growing specialised skills

2019-2022 | S&PA occupations | SOC4 | % increase



Education levels

2022 | S&PA occupations



Source: Lightcast job postings

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