

# **EU Conference on Sport Statistics**

**Organised by the European Commission in Brussels on 23 March 2011**

## **REPORT**

### **Summary:**

Strategic planning, policy actions and cooperation among relevant actors in the field of sport need to be underpinned by a sound knowledge base. In the context of EU-level cooperation in sport pursuant to Article 165 TFEU, there have been increasing demands on the European Commission by policy-makers, experts and sport stakeholders to provide more reliable and comparable data. The European Commission therefore organised an EU Conference on Sport Statistics in Brussels on 23 March 2011. This was the first expert conference of its kind at EU level. It focused on statistical and information needs underpinning the development of sport as a new EU policy area. The conference gathered around 70 experts in the field of statistics, representatives from sport administrations and stakeholders from the non-governmental sector. The Commission thus provided a platform for an exchange of views between the policy and expert levels. The morning session addressed the measuring of the economic impact of sport and the afternoon session discussed elements for a possible sport monitoring function in the EU. The agenda topics covered Sport Satellite Accounts; constraints of data collection for the sport economy; examples of data collection in the field of employment, the sporting goods industry, sport participation and sponsorship; data collection at Eurostat; and a national example of a data warehouse concept.

The main outcomes of the EU Conference on Sport Statistics can be summarised as follows:

- Strong general support from participants for addressing data needs and building up a better evidence-base for sport at EU level;
- Identification of existing forms of transnational cooperation for collecting and compiling sport data;
- Identification of relevant Eurostat surveys that already include or should include sport data in the future (e.g. HBS, SILC, ...);
- Proposal for the production of a manual for national statistical offices on how to set up Sport Satellite Accounts;
- Proposal to explore the possibility of setting up macro-economical indexes available in all Member States.

Next steps at EU level could include:

- Further support for establishing Sport Satellite Accounts at the national level;
- Finalisation of and follow up to the ongoing study on sport's impact on economic growth and employment;
- The launch of an EU study on the feasibility of establishing a sport monitoring function in the EU by the Commission (call for tender to be published in 2011);
- Possible policy support by the Council to enhance data collection at national and EU levels, to make existing data on sport and physical activity available at EU level and to establish or support research programmes and/or networks;
- Support for improving the sport evidence base within possible future incentive measures in the field of sport.

## Opening of the Conference

*The Commission (Gregory Paulger, Director for Youth and Sport)* opened the Conference by explaining the overall EU policy context for sport and stressing the importance to improve the evidence-base when implementing the sport provisions in the Lisbon Treaty (Article 165 TFEU). The Commission had highlighted this need in its recent Communication on Sport. There was general acknowledgement of the social and economic values of sport and physical activity. There was also a wealth of data collected through research and studies at international and national levels. However, when it came to policy making in an EU setting, reliable and comparable data were scarce. Therefore actors in sport, from the Ministerial to the expert level, had repeatedly called on the Commission to improve the evidence base for sport. The Commission encouraged experts in the fields of statistics, including representatives from national statistical offices and Eurostat, and sport research, as well as representatives from sport administrations and stakeholders from the non-governmental sector, to address the issues at stake.

### State of play regarding EU-level work in the field of sport statistics

*The Commission (Michal Krejza, Head of the Sport Unit)* recalled that the Conference should serve two purposes: to take stock of current achievements and to brainstorm on future needs regarding information and data collection at EU level. He noted the lack of reliable and comparable statistics at EU level regarding e.g. macro-economic data, employment, health, education or participation in the field of sport, and referred to the following underlying EU level developments to set the context for the discussion:

- *Treaty basis*, i.e. article 165 TFEU giving the EU a supporting, coordinating and supplementing competence for sport;
- *Europe 2020 Strategy* and the need to illustrate the sport sector's contribution to growth and jobs;
- *EU Sport Ministers' call* for a better evidence base for sport (EYCS Council, May 2010);
- *Ongoing discussions on the future Multiannual Financial Framework (MFF)* to possibly include incentive measures for sport as of 2014, which might support the production of statistical data;
- *2007 White Paper on Sport*, addressing for the first time EU data needs for sport and paving the way for the Working Group "Sport & Economics" that had developed a European statistical definition of sport, the so-called Vilnius Definition, based on which production of data in the form of Sport Satellite Accounts had started in several Member States;
- *2011 Communication on Sport*, providing for additional concrete actions to develop an evidence base for sport at EU level, notably the production of Satellite Accounts for Sport compatible with the agreed European definition and a study on the feasibility of establishing a sport monitoring function in the EU to analyse trends, collect data, interpret statistics, facilitate research, launch surveys and studies;
- *A study on the contribution of sport to economic growth and employment in the EU*, recently launched, the results of which should become available in the first half of 2012.

Apart from these processes and the Commission's strategic documents on sport, it was important to acknowledge existing research, studies and surveys carried out at national and supra-national levels, including in a European context, to gather sport data both in the

economic and social fields. There were several approaches involving statistical offices, academics, researchers as well as focused European networks specialised in developing methodologies for extracting data on sport. There were also several independent sources, such as the sporting goods industry, trade associations, social security organisations, chambers of commerce, or the International Labour Organisation. The Conference should highlight a selected number of good practice examples from the national level and existing forms of transnational cooperation for collecting and compiling sport data. The Commission invited the participants to brainstorm on future needs and was interested in learning about experts' views regarding the main areas where comparable sport data were needed, and about the main activity fields to be covered by a possible future EU sport monitoring function.

## **1. First session: "Measuring the economic impact of sport"**

### *Sport Satellite Accounts: the European project*

*Chris Gratton (Sport Industry Research Centre, Sheffield Hallam University, UK)* gave an overview about Sport Satellite Accounts (SSA) and the work carried out in the Working Group "Sport & Economics". The following results had been achieved: a common methodology for creating SSAs at national level based on the "Vilnius Definition of Sport" had been developed; work on national SSAs had started in seven countries (AT, CY, DE, NL, HU, PL, UK); data collection based on final SSAs had been carried out in four countries (AT, UK, CY and recently PL); a leaflet on the first results for AT, CY and UK had been published. From a UK point of view, an SSA was especially interesting with a view to the 2012 Olympic Games. For the first time a country would be able to demonstrate the impact of the Olympics on the national economy. The strength of the European project was that all participating countries used the same definition of sport and the same methodology to construct their SSAs, which would allow making genuine international comparisons for the first time.

### *Sport Satellite Accounts: the example of Poland*

*Barbara Liberda (Central Statistical Office, Poland, and University of Warsaw)* presented the key steps for setting up the national Sport Satellite Account in Poland. The project had been commissioned by the Ministry of Sport and Tourism and prepared by the Institute of Official Statistics and the Central Statistical Office. It was finalised in December 2010 for the year 2006. The sources of data included questionnaires of private and public sector economic entities, non-governmental organisations (specific feature for Poland), the Household Budget Survey and "Participation of Poles in Sports and Physical Recreation", the Labour Force Survey, international trade databases INTRASTAT and EXTRASTAT, data from the Ministry of Finance as well as statistical reports of local administration units. The calculation of the Sport Satellite Account for Poland was based on the supply and use tables for 58 types of activities and 465 product groups, of which 43 product groups were significantly related to sport.

### *The impact of sport on the European economy – an agenda*

*Christian Helmenstein (SportsEconAustria - SpEA)* presented the core elements of the ongoing study on the contribution of sport to economic growth and employment in the EU which the Commission had launched in early 2011 and which would be based on national SSAs using the Vilnius Definition of Sport. Concerning its methodology, the study would use national input/output tables for sport (IOT-S) - one for each country, the multiregional input-output-model, and finally have a single IOT-S for the entire EU. He noted that a successful exercise would allow highlighting the contribution of sport to the Europe 2020 strategy.

*Discussion:*

- When asked about the methodology used for the ongoing study, Mr Helmenstein noted that in many countries successful exercises had taken place to measure the impact of sport in the national economy before work on SSAs had started; the analysis should also make use of those results. In addition, there was an enormous amount of data available at international bodies such as FESI or EOSE. Furthermore the standard tools available would be used, e.g. the HHB survey and other surveys. There would be a lot of non-harmonised data, but part of the study would be devoted to attempts at harmonising them. It would also be important to compare previous exercises with the Vilnius Definition of Sport and to identify possible deviations. The data would not be published on a nation-by-nation basis, but by having an EU-wide calculation. Furthermore he explained that some aggregation would be necessary; the suggestion was to proceed with 37 products and to have a kind of pecking order procedure. The contribution of sport to growth, value added etc. was highly concentrated in a few sectors (the idea would be to list up to 7 sectors). Regarding import-export data, a solution could be to draw upon IMF directional trade statistics. With a multiregional IOT-S effort at a later stage, it should be possible to do calculations for regional comparison.
- Concerning trade data, Mr Gratton stressed that it was too early to talk about solutions on the import/export issue as the first consortium meeting was still to come. One particularity of the sport sector was that most of trade in goods (equipment, sport clothing) consisted in imports from China/Asia. There might be big European manufacturers, but they did not produce much in Europe. The difficulties would be more in the service sector as some of this trade stayed within Europe while some was with other countries.
- Mr Zeitounian from the Statistical Office of Cyprus informed that Eurostat was going to publish the first EU aggregated input/output tables. He stressed the need to solve the intrastate asymmetries.

#### Voluntary data collection on the sport sector within structural business statistics

*Merja Hult (Structural Business Statistics (SBS), Eurostat)* presented the results of the voluntary data collection of SBS on the sport sector, which had been launched in 2010. She noted that eight countries had provided data (BG, CY, CZ, ES, HU, PT, SK, UK), and six out of the eight considered the results to be of good quality. Some Member States did not need/publish data at that level of detail. She concluded that the enterprise approach (SBS) might not be the right way, given that it represented mostly "market" activities, while a number of important non-market players were active in the field of sport. The classification was not detailed enough and there was a limited participation of Member States. There would be a discussion on the results at the next SBS Steering Group in April. She added that a revision of the EP and Council Regulation was not foreseen in the short run. The data was available and if it was considered to be useful and worthwhile, a continuation on a voluntary basis could be considered.

#### The contribution of the European sporting goods industry to a better identification of sport-related data

*Ernst Aichinger (Federation of the European Sporting Goods Industry - FESI)* presented the view of the sporting goods industry. FESI's interest was to have better identification of sport related data within all existing classifications (NACE, CPA, PRODCOM, CN/Taric, ISIC); a harmonised EU and Global classification system; global statistical data on sport for policy purposes; market statistics for a better understanding of the economic impact of sport and sporting goods (employment, social security savings, health, social inclusion, research and innovation). He concluded that the sporting goods industry was actively supporting the work and conclusions of the Working Group on Sport and Economics. Therefore FESI encouraged

national statistical offices to create national SSAs that would gather the data on all sport-related economic activities based on the clear and reliable Vilnius Definition of Sport. In addition, FESI called on national statistical offices to participate in the voluntary data collection by EUROSTAT on Structural Business Statistics. A broad participation in this initiative could possibly lead to a future mandatory study resulting in a comprehensive statistical tool.

#### Constraints of data collection for the sport economy

Wladimir Andreff (*Professor Emeritus at the University of Paris 1 Panthéon Sorbonne*) explained the constraints of data collection from the economic point of view. He noted that data collection was time-consuming and had to be comprehensive for the sake of comparison across EU Member States. Data creation had to be undertaken when crucial information was missing. In his view, the accounting classification of the sports economy should be harmonised. Moreover, non-trade sport goods and services were of crucial importance in the sports economy and the SSA technique had the advantage of being able to encompass non-monetary flows. It should be envisaged to reconcile the different approaches previously adopted for data collection and to adjust available data to the SSA harmonised framework. He concluded with some recommendations: to develop a set of indexes representative of the sports economy consistent with the SSA and published on an annual basis; to create a long-lasting administrative structure of data collection about the sports economy capable of guiding this work – e.g. a specific statistical office at the level of the competent ministry; to sign an agreement between the sports ministry and the national statistics institute committing the latter to automatically deliver data pertaining to the sports economy; to commit the statistics institute to collect more detailed and better classified data on the economic dimension of sport.

#### *Discussion:*

- In reply to a question regarding his proposal to explore the possibility of setting up macro-economical indexes, Mr Andreff underlined that collecting detailed data would take a long time. If data was disaggregated step by step, it would be possible to introduce this information in the SSA without having all the input/output relations from the first moment. There was agreement that it would be a step forward for countries which have not yet developed SSAs. However it would not be easy to interpret the data. Decision makers and politicians often needed data in the short run, so that an important issue was the dynamics of the data collection. The SSA was the best academic solution, but there was also a need for data that could be produced speedily.
- It was noted from the audience that in order to have sport-specific indicators (macro-economic information system), a number of questions of the EU-wide HHB surveys had to be enlarged in order to allow making an annual update of the SSA.
- The panel agreed that there was a need for policy support to enhance data collection at national and EU levels and to make existing data available at EU level. Eurostat added that the political pressure and national statistical institutes (NSI) played a crucial role in this matter (national priorities). Following the economic crisis most Member States had had budget cuts. An incremental approach was a good idea and good examples must be presented. Mr Andreff added that one of his suggestions was to sign an agreement between the NSIs and the ministry responsible for sport.
- The Statistical Office of Cyprus proposed to produce a manual for national statistical offices on how to set up Sport Satellite Accounts. There was general support for this idea from the meeting, as well as a feeling that this could be a good idea to motivate politicians to support the work on SSAs. However, it was noted that an open

discussion on the compilation process should be started (e.g. starting point, modelling or accounting based approach).

- From a more general point of view, Mr Gratton explained that there were two ways to start setting up SSAs. From the demand side the estimation of the sport sector started from consumption, continued with the government sector, the voluntary sector and foreign trade, and ended with an estimate for employment and value added. But the SSA started with the supply side and at the end it resulted in an estimate for consumption, value added and employment. Ultimately there were the same aggregates but starting at the other side of the market.
- It was noted from the audience that there were two sides of sport: sport as entertainment (spectators, TV...); and the participation which was far more important in the long term from a policy perspective. Mr Helmenstein replied that this issue had been solved in the Vilnius Definition of Sport by including three different definitions (statistical, narrow and broad) meaning that both the upstream sector (retail, education, financial services, construction) and the downstream side (TV, media, tourism, lotteries) were included in the broad definition.
- Mr Andreff highlighted the importance of the voluntary sector and that even though it was not measured it did not mean that no economic activity was involved. An advantage of SSAs was that it was possible to include non-monetary activity such as voluntary work.
- In reply to a question from the audience Ms Hult noted that for the moment the steering groups for SBS consisted of members of NSIs and that they reviewed the developments of enterprise statistics. There were no researches presented, but the political side/user view was represented by the different Directorates-General of the Commission.
- Mr Andreff suggested that academics should be more involved in building data and also in advising sport authorities and NSIs.

## **2. Second session: "Elements for a possible sport monitoring function in the EU"**

### *Sport and Employment in Europe: key achievements and challenges*

*Thierry Zintz (European Observatoire of Sport and Employment – EOSE)* gave an overview of the key achievements and challenges for employment data, including the idea to produce national sport fact sheets on the request from stakeholders. He explained the objectives of the sector approach: improve the recognition of competences & qualifications; promote a transparent and flexible education and training system with clear learning and career pathways; ensure the development of a competent workforce with the right skills and competences in line with the expectations of the labour market; facilitate the movement between education & employment; develop mobility, transparency and mutual trust of qualifications. He underlined the main challenges: the economic and employment potential of sport was not sufficiently recognised and understood; sports training remained outside the national qualification structure in most Member States; there was a need to update the Labour Market and Skills Map in Europe.

### *Data warehouse concept of the German Sport Development Report – a model for EU sports statistics?*

*Christoph Breuer (German Sport University Cologne)* outlined the German Sport Development Report and presented a data warehouse concept as a possibility for EU sport statistics. He highlighted that a lot of surveys and other sport-related empirical research work existed, mostly with a national or regional focus, and was mostly funded by national or

regional governments. It was, however, difficult to make cross-national comparisons and European analyses. With the idea of an "EU data warehouse of sport statistics and data", more information could become available (e.g. Sports clubs surveys in Belgium, Denmark, Finland, Spain, UK etc.); and more effective and efficient research, monitoring and EU policy formulation would be possible.

#### Possibilities and limits for collecting "social data" at EU level

*Christine Coin (Education, science and culture, Eurostat)* presented the possibilities and limits for data collection in the different EU-wide surveys (EU LFS – Labour Force Survey, EU-SILC – Statistics on Income and Living Conditions, EU AES – Adult Education Survey, EHIS – European Health Interview Survey, TUS – Time Use Survey, HBS – Household Budget Survey). Ms Coin highlighted the issue of classification, i.e. the item of sport in the surveys was not detailed enough or was aggregated with culture, recreation, leisure etc. Some other limits for data collection were mentioned: the data transmission to Eurostat was not always regulated; the level of detail was not mandatory; the periodicity of the surveys could be insufficient; the number of observations for some sub-populations could also be insufficient for some countries; there was a lack of methodological guidelines to measure some variables. She concluded that some "social data" on sports were available. However, there was no global methodological framework behind them and this would require additional resources that were currently very limited.

#### *Discussion:*

- When asked about the lack of data, Mr Zintz highlighted the issue of accessibility and comparability. There was information from many Member States but it was not comparable as such. The question was where the data was coming from. First-hand information was often missing.
- Mr Breuer stressed that in many cases data was already available. There were many data sets at national level available, but there was no overview of these. He suggested as a first step to get such an overview (what existed/how to combine).
- Mr Andreff stressed that studies were duplicated sometimes not just in Europe, but also within the same country. Hence centralising all the data first at national level and then, if possible, at EU level would be significant and would save money.
- The Polish Central Statistical Institute noted that most of the data was there, but coordination and a common framework was needed. For the sake of a complete picture, two areas had to be discussed. As for the non-profit sector, a methodology how data could be collected had been produced (UN Non-Profit Handbook). The other issue was voluntary activity. The International Labour Organisation had just finished work on a methodological guide how it could be measured. Poland would present the results by the end of the year.
- Regarding the European Sport Economics Association (ESEA), Mr Breuer explained that there was excellent knowledge in the Association regarding economical questions. ESEA discussed several topics and would like to share them with policy makers.
- Mr Andreff added that two other associations existed on sport economics, one international, the other North American. ESEA was probably the most policy-oriented.
- Regarding Eurostat's activities, Mr Andreff agreed that data supply must be mandatory. However, if the data collection was mandatory, it should be first checked if the Member States had the data available, otherwise there could be the risk of receiving estimated (or even invented) data. The other question was who would decide which data would be collected.
- Ms Coin replied that the mandatory data transmission to Eurostat, according to common concepts and methods, resulted from an analysis of users' needs (here DG EAC was an important partner) and from the legal process whereby Member States

(Council, Parliament, or Committees at Eurostat) were involved. She added that if a new data request was introduced, a transition period was foreseen so that solid data could be produced.

- It was noted from the audience that concerning the EU surveys the link to physical activity/sport/well-being could be strengthened. There was some data about sport participation in Member States but they were not comparable. Hence maybe a separate question across the EU could be added. Some surveys demonstrated different results for the same country.

#### "Measure" – sport participation in Europe

*Koen Breedveld (WJH Mulier Institute)* presented tools to help raise Europe's level of sport participation, including the network "Measure". He highlighted that increasing participation / inclusion was at the core of any sport policy, and that social, economic and health effects were related with participation levels (e.g. increased social trust, self-esteem, self-discipline, national unity, learning achievements; increased spending and interest in elite sports; decreased physical and mental illness and absence from work). In addition, Mr Breedveld discussed the difficulties in understanding differences in sport participation between countries and in relating those differences to differences in sport policies. Mr Breedveld explained that "Measure" was a network of social scientists from universities, research corporations and statistical offices with a track record in researching sport participation and an aim to alleviate some of the aforementioned difficulties. The goals of the network were to improve data; increase understanding of sport; enhance knowledge and exchange of information; bring together top-level researchers; provide easy access to information on sport participation in Europe (factsheets, articles, books, and portal/website). He concluded that it was important to find funding to finance larger projects, to further develop the website and to strengthen links to policy makers and practice.

#### Identifying international trends in sport participation: challenges of the IOC's "Youth and the practice of sport"

*Nils Holmgaard (International Olympic Committee – IOC)* presented the 2008 IOC study on youth sport participation. It aimed at collecting hard data showing patterns in youth sport participation across the world in the previous 10-15 years. The Research and Reference Service of the IOC managed the work on the study in collaboration with 25 experts representing 20 different countries. He noted that studies and surveys conducted over time tended to be limited. Moreover, changes in the wording, sampling and methodology often made it impossible to identify time trends; differences in questionnaires, research design, methodology and definitions of terms made country comparisons difficult or impossible; little data was available on youth participation in unstructured sport; data often referred to "physical activity" rather than "sport".

#### Existing research undertaken by sports sponsorship research agencies

*Sandra Greer (European Sponsorship Association – ESA)* gave a concise appraisal of the sports statistics used within the sponsorship industry. She noted that ESA was a relatively new organisation, founded in 1990, befitting the relative use of sports within the marketing and communications industry. Ms Greer added that ESA worked in association with national sponsorship organisations as well as those from outside Europe to discuss and learn new approaches. She stressed that sport statistics were needed through the full cycle of a sponsorship campaign and presented the types of sport statistics required and collected (e.g. participation, attendance of events, media, profiles, properties, experience). All of these data were used throughout the full cycle of the sponsorship. Ms Greer gave examples of some high-profile and well-regarded sources: TGI; Sport und Markt's Sponsoring 21 report; International Sports & Events Study (ISES); Active People Survey in the UK; "Sport

Business in Numbers” series; databases at the World Sponsorship Monitor from IFM Sports Marketing Surveys and Sport und Markt’s Sponsor Globe; Sportcal. In addition the industry also had a plethora of market intelligence reports and industry trend surveys to help guide companies.

*Discussion:*

- Regarding a sport monitoring function, it was noted by the Danish Sport Institute that there was a lot of data available but that it remained largely unused and unexamined. It would be good to have a body which disseminated these data and initiated debates at EU level.
- It was noted from the audience that while this conference provided a good opportunity for exchanging views, there were expectations towards the Commission to support data collection and monitoring of the sport sector through subsidies or actions in the coming years.
- In reply to a question from the audience regarding factors that influence the level of sport participation, Mr Breedveld noted that social welfare and education levels were important, but also other motivating factors such as parents participating themselves or having participated as a child. In general studies showed that people with higher education continued to be more active in sports. He highlighted some outcomes of studies which showed some problems and myths to be tackled: success in elite sport appeared not to stimulate sport participation; having facilities nearby did not help to have more people active in sports; young people were not participating less than before; people with less time did not participate less in sports.
- Ms Greer noted that from a commercial perspective the focus was mostly on the experience which people achieved (attend, inspire, image of sport - not just participation).

### **Conference conclusions and next steps**

The Commission (Michal Krejza, Head of the Sport Unit) concluded that the discussion had been very useful and had confirmed that the actions proposed in the Communication were going in the right direction. It was important to get this feedback from a wider audience. He thanked the participants for their active participation and the high quality of their contributions.

He added that in response to the Communication, the Council of Ministers was preparing an EU Work Plan for Sport (to be adopted in May 2011), which further highlighted the work on SSAs. Furthermore, following the ideas and elements gathered during the conference, the Commission would now start drafting the Terms of Reference for an EU study on the feasibility of establishing a sport monitoring function in the EU (results expected by the end of 2012).

Two concrete proposals had been made and deserved follow-up:

- Production of a manual for national statistical offices on how to set up Sport Satellite Accounts;
- Exploration of the possibility of setting up macro-economical indexes available in all the Member States.

Moreover, the conference had confirmed that:

- there was already a lot of existing data available;
- good cross-national networks (e.g. EOSE, Measure, ESEA) already worked at EU level;

- the sport movement was working on gathering sport data as well;
- there was a wealth of information related to the commercial sector;
- a debate at EU level involving the relevant actors was necessary;
- the methodologies used for different studies and surveys were not comparable;
- the Commission, national statistical offices and sport authorities had to work together to tackle the problems;
- improvement was necessary in EU-wide surveys to include sport (so far it was a by-product);
- the needs of policy makers had to be identified to decide what kind of data needed to be collected.

Finally, Mr Krejza highlighted that the next steps depended to a considerable extent on the available financial resources. The discussion for the next multi-annual financial framework had started, and the Commission would make its proposals by early July. Thereafter the Member States and the Parliament would discuss the proposals. If future EU funding for sport was foreseen, support for a sport monitoring function at EU level should be seriously considered. The Conference had highlighted the need for such a function and had provided valuable ideas for its possible content.