Methodological Centre for Vocational Education and Training

Study of Sports Sector

Research report on skill needs

Vilnius, 2008
STUDY OF SPORTS SECTOR

We are sincerely grateful to sports sector organisations and everyone who helped us in this activity. We hope that the information presented will be helpful while planning employees training and performing other tasks.
SUMMARY

The sports sector (SS) has been included in the Classification of Economic Activities in the European Communities, NACE. It consists of two sub-sectors, including Operation of Sports Arenas and Stadiums (activity 92.61, further referred to as SAS) and Other sporting activities (activity 92.62, further referred to as OS).

International Trends of Sports Sector Development

During the recent years, the European sports sector has experienced a number of changes, affecting the areas of sector management, staff employment and technological advancement. The key factors of development of the European sports sector are the growth in sporting activities, globalisation, new technologies and ageing of the population. The importance of sports has also grown after the European governments started to invest more into the sector, recognising its positive role. During the recent ten years, as a result of a more active participation in sporting activities on the part of the population, the employment in the sports sector has increased by almost 60 %.

Quite likely that in the future the sector will be characterised by the prevailing part-time employment and low earnings. High competition for better paid occupation posts will remain. The level of employment should increase among semi-professionals or amateurs. The demand for sports related occupations (sport psychologists, physiotherapists, sports commentators, physical training coaches, etc.) is likely to go up.

Trends of Sports Sector Development in Lithuania

Enterprises. On 1 January 2006, the Registry of Economic Entities recorded 1502 enterprises which named sports activities as their main type of activity. Out of that number, 447 enterprises had staff and turnover. 8 % of the enterprises specialised in the area of SAS. The sector was predominated by small enterprises (where the number of staff is up to 9 people), run by the Lithuanian capital. The biggest concentration of sports enterprises was in Vilnius and Kaunas counties.

Employees. According to the statistical data of 2006, the sports sector employed 2,300 people. That is a very small share of the employed (constituting 0.15 %) in the overall Lithuanian economy. 82 % of that number was in the OS sub-sector. The majority of employees belong to the group of professionals.

Main features of development. Society becomes more and more appreciative of the role of sports. However, the findings of the survey performed in 2007 showed that half of the population aged 7-80 does no sports (neither exercises itself nor attends any kind of sports training). About 32 % of the population exercises individually and 16 % of it attends organised sports training. As compared to 2001, the public attitude towards sports has not changed. All the more relevant is the main objective, which is implementation of fitness and sports programmes for everyone, performance of awareness-raising campaigns highlighting the importance of physical training and paying special attention at healthy lifestyle in all education and training establishments. The current state of the national economy is unable to ensure the optimum funding for the development of the sports system. As a result, the implementation of the Physical Education and Sports Strategy of 2005-2015 cannot be carried out at full speed. Small earnings offered to physical education and sports professionals in
the public sector, particular in the beginning of their career, make them divert to other activities or get re-trained. Due to that, sports teachers and coaches at school are ageing, which means the likely shortage of such kind of professionals in the future.

**Performance indicators.** During the recent five years, the turnover in the sports sector has been steadily increasing. This trend is characteristic of both sub-sectors. Earnings have gone up in the SAS sector, whereas in the OS sector, they have slightly diminished. The SAS sub-sector earnings are more or less in line with the national average monthly gross earnings, whereas those of the OS sub-sector are among the smallest in the country (lower salaries are offered only in the hotel and restaurant sector). During the period of five years, the gross value added created by the OS sub-sector remained almost the same (in 2001, it accounted for 0.1 % and in 2006, it made up 0.09 % of the total GDP). In the recent two years, new products/services were provided by 40 % of the SS enterprises. The majority of new services include adult and children training, trade in sports gear and food supplements, organisation of sports competitions, provision of recreation services, organisation of activities and taking orders by the internet. According to the enterprises, competition in the Lithuanian market is not high.

**Technologies.** Modern technologies are used by almost 66 % of the SS enterprises and 49 % of enterprises are planning to use such technologies in the future. The most frequently used technologies include fitness trainers, video and audio equipment, and public information equipment.

**Development trends.** The Lithuanian Department of Statistics predicts that the turnover of sports enterprises will be increasing in 2007-2011. The threats to a successful business development include a low standard of living, legal regulations and the tax system. Few enterprises also mentioned the shortage of employees and the lack of competence on the part of staff as an obstacle to a successful business development.

The main indicators effecting the future development of the SS include the following:

- positive economic changes;
- growing customer expectations and a need for a new type of services;
- awareness of sports as a cultural and social phenomenon;
- maintenance of health as the main value;
- technological advancement;
- discrepancy between the qualification of employees and the needs of the sector.

**Demand for employees.** The turnover of staff in the sector accounts for 10 %. The biggest turnover of employees is in the administration group, making up 15 %. 31 % of the respondents are planning to employ more staff in the upcoming two years.

The Lithuanian Labour Exchange records a relatively small number of the unemployed who previously worked in the sports sector. Furthermore, the number of vacant posts offered in sports enterprises is also relatively insignificant. From 2003 to 2006, the number of the registered unemployed coming from the sports sector was decreasing, however in the future, similarly to the situation in the overall economy, the number of the registered unemployed should slightly go up. The tension level (*i.e. the ratio between vacant posts and the*
number of the unemployed) in the sports sector stood at almost 0.4 and was smaller than the relevant national indicator (0.9). This means that the quantitative supply of employees in the sports sector is exceeding the demand for them.

According to enterprises, the number of employees in the sports sector will be increasing in the upcoming five years. Such growth will be seen in all groups of occupation posts. The annual need for new employees will amount to approximately 226 people. Among them, the biggest demand will be for service staff and professionals. The Lithuanian Labour Exchange projects that the growing demand for the labour force in the sports sector will be driven by the increasing demand for maintenance staff, sports gear salespersons, and supervisors of sports equipment. The growth in the number of employees is related to the increasing volume of investment into the sports objects of national significance.

Changes in skills. According to enterprises, their employees have enough theoretical knowledge, yet what they lack the most are general and practical skills. A particular emphasis is placed on the lack of foreign language skills. The group of employees which is the most lacking in skills is sports professionals. Sports experts think that young coaches lack the skill of looking for novelties, and the majority of sports managers lack the knowledge of strategic planning. These skills would be particularly significant if the sector were subject to rapid developments.

Supply of employees. Generally speaking, the balance with regard to the supply and demand for employees in the sports sector is positive. The demand for employees exceeds the supply for them only with regard to the group of service staff. As a matter of fact, only one vocational training programme is available to train the employees of this group.

There is no actual threat that the shortage of employees in the group of professionals will be increasing in the future because the supply of them is exceeding the demand as many as ten times. Noteworthy, the majority of studies in the sports sector are based on pedagogical programmes the aim of which is to train physical training teachers.

Recommendations:
The future of the sector largely depends on the attitude of state authorities (knowledge, reaction and activity) as well as cooperation of training providers and representatives from employers and employees organization in organization of employees initial and continuing training. Furthermore, the following measures should be taken to ensure conformity between the supply and the demand of employees:

• The National qualifications system, which is being developed, will set professional standards for all the economic sectors on the basis of an in-depth analysis of occupational activities. Therefore, it is recommended to initiate and develop a professional standard for the sports sector, elaborately describing the current and future qualifications in the sports sector. This would help develop new qualifications, review the current training/study programmes and organise primary and continuing training and education more successfully.
• Lithuanian higher educational establishments offer about twenty different study programmes which could be ascribed to the sports sector. The majority of them are pedagogical, the aim of which is to train physical
training teachers for general education schools. However, there is bigger need for professionals to work in sports clubs and fitness centres. Therefore it is recommended to modify and improve the study programmes to incorporate training of sports instructors.

- Findings of the survey of enterprises and forecasts made by the Lithuanian Labour Exchange suggest that the biggest discrepancy between supply and demand is in the group of service staff. The employees of this group should be trained according to vocational training and education programmes. However, presently, only one school offers a vocational training programme for the sports sector. Therefore, it is recommended to increase the number of primary vocational training programmes for the sports sector and initiate organisation of the relevant labour market training programmes.

- The survey of employers revealed that the SS professionals lack general and special skills. A particular emphasis is made on the lack of foreign language skills. Therefore it is essential to strengthen foreign language teaching and training of general skills in training/study programmes and offer a wider scope of refresher courses facilitating development of the required skills.

- With a view to ensuring quality of specialist training and developing opportunities for upgrading qualifications, it is recommended to strengthen cooperation between training and educational establishments on the one hand and employer organisations on the other.

- Sports enterprises suffer from the lack of financial stability. Therefore, primary and continuing training programmes should pay more attention at development of entrepreneurship.

- Another relevant issue is the career of highly mastered athletes after they stop doing professional sports. They could be offered an opportunity to acquire a parallel qualification during their career.

- It has been determined that small earnings offered to physical education and sports professionals in the public sector, particular in the beginning of their career, make them divert to other activities or get re-trained. Therefore, in order to maintain such employees their working conditions should be improved, particularly with regard to their work pay, and the system of employee motivation should be developed (to include insurance, loans, promotion, etc.).

Structure of the study. The study comprises 6 chapters. Chapter 1 makes a brief overview of the objectives of the study, the concepts used by it and the methodology of the social survey. In addition, it describes the structure of the sports sector. Chapter 2 explains the international trends in the sports sector development. The purpose of Chapter 2 and Chapter 3 is to analyse performance indicators of the sector and make an assessment of the employee demand. The indicators used in Chapter 3 are based on the data developed specifically for the study and publicly available information, whereas the indicators in Chapter 4 include findings of the survey. Chapter 5 analyses the supply of employees and Chapter 6 provides recommendations. The latter were developed on the basis of analysing all the information. Their aim is to reduce discrepancy between the supply and demand of employees in the sports sector.
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1. RESEARCH METHODOLOGY

1.1. Introduction

Since 2005, the Methodological Centre for Vocational Education and Training has been performing a project, Development of the National System of Vocational Education and Training Standards. The purpose of the project is to develop the national system of vocational education and training standards which would help increase conformity between training and education on the one hand and global performance needs on the other hand as well as provide better conditions for life-long learning. One of the main activities of the project is to examine six economic sectors with a view to assessing the prospects of their development and the impact on the number of employees and training needs. The project is of national importance and is funded by the European Social Fund.

The project is a follow-up of the programme of sector studies started in 2000. So far, four sectors have been examined, including retail trade, information technologies, mechanics and electronics as well as hotels and restaurants.

1.2. Authors of the Study

The study was developed by a group of experts representing a variety of Lithuanian bodies and establishments (educational, scientific, statistical, social security and labour, business, etc.). Assistance was provided by experts from Ireland having the relevant expertise in implementing similar type of activities.

1.3. Goal of the Study

The main goal of the study is to analyse the trends of development of the sports sector in Lithuania and other countries and, on the basis of that, determine the changes in the number of employees and training needs for the upcoming five years as well as provide concrete recommendations to improve conformity between the supply and demand of the labour force.

1.4. Methodology

The sectors are studied using a single methodology developed together with the Irish experts in 1999. The study consists of the following phases:

1. An overview of publicly available information in Lithuania and other countries about the sector and related areas as well as the analysis of official statistics about the sector;
2. A survey of sector enterprises by means of interviews and postal questionnaire surveys;
3. Analysis of all information and identification of change factors in the sector;
4. Projection of employment in the sector;
5. Assessment of the sector training needs in the upcoming five years.
1.5. Definition of the Sector

The sector consists of the direct sporting activities (e.g. sports clubs, workout) and sports related activities (e.g. manufacture and trade of sports inventory, health care services). In this study, the sports sector is defined in line with the 1999 European Classification of Sport and Sport Related Economic Activities as well as the NACE classification, i.e. as an economic activity directly related to practical sports (Fig. 1.1). The definition has been modified by the Lithuanian and EU experts. This ensured an opportunity to compare the findings of the study on an international scale.

By definition, the sports sector comprises two sub-sectors, including Operation of Sports Arenas and Stadiums (further referred to as SAS) and Other sporting activities (further referred to as SA).

Fig. 1.1. Structure of the Sports Sector by Activities under the NACE Classification

*The sub-sector ‘Other sporting activities’ includes enterprises which engage in ‘horse-riding school activity’, ‘sport and recreational hunting and related activities’, ‘sport and recreational fishing and related activities’. Since the volume of statistics is small, the option of analysing only the enterprises engaged in sport school and clubs activities is unreasonable.

1.6. Sociological Survey of Sector Enterprises

The sample for the postal questionnaire survey was selected on the basis of the data taken from the Registry of Economic Entities, as well as by looking at the type of the prevailing economic activity (according to the statistical classification NACE) and the enterprise size. The total number of enterprises interviewed was 996, including 38 enterprises from the SAS sub-sector and 958 enterprises from the OS sub-sector. All the participants of the postal questionnaire survey were asked to return the filled out questionnaires after several weeks. When the questionnaires were sent out to the respondents, telephone calls were made to remind them about the deadline for sending the questionnaires back. In this way, a sufficient level of response was secured.

Interviews were made with the respondents from the leading enterprises. The total number of enterprises was 11 (including 4 enterprises from the SAS sub-sector and 7 enterprises from the OS sub-sector). The information received was used to assess training needs.
2. INTERNATIONAL TRENDS IN SPORTS SECTOR DEVELOPMENT

2.1. Introduction

The sports sector in Europe has undergone many changes within the last few years, including changes in the management of the sector, the employment of staff and advances in technology. Many of these developments reflect changes in the demographic profile of European countries as well as the way economies have grown and are organised. Such changes, coupled with the likely development of the sector within the next number of years, will have very significant effects on the training needs of those working in the sector. This section examines the likely effects of these developments on the skills needs of the sports sector in Europe.

2.2. Definition of the Sports Sector

The sports sector represents a disparate group of related activities and services ranging from organised competition within clubs as a means of training and education, to the events participated in by professional sportspeople, to leisure pursuits practiced for pleasure or fitness purposes, and to the use of sports to boost social integration of population groups in difficult circumstances.\(^1\) As can be seen in Table 2.1, sport represents an average of 1.6% of GDP in all European Union member states and over 2.5% in some (e.g. Austria, Italy and Slovenia).

<table>
<thead>
<tr>
<th>Country</th>
<th>% of GDP dedicated to sport</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>2.7</td>
</tr>
<tr>
<td>Belgium (Flanders only)</td>
<td>1.4</td>
</tr>
<tr>
<td>Finland</td>
<td>0.6</td>
</tr>
<tr>
<td>France</td>
<td>1.7</td>
</tr>
<tr>
<td>Germany</td>
<td>1.4</td>
</tr>
<tr>
<td>Greece</td>
<td>1.7</td>
</tr>
<tr>
<td>Hungary</td>
<td>0.3</td>
</tr>
<tr>
<td>Italy</td>
<td>2.5</td>
</tr>
<tr>
<td>Netherlands</td>
<td>1.8</td>
</tr>
<tr>
<td>Poland</td>
<td>0.6</td>
</tr>
<tr>
<td>Slovenia</td>
<td>2.4</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>1.5</td>
</tr>
</tbody>
</table>

Source: Vocasport, 2004

2.3. Relationship between Sport and Other Sectors

In examining recent trends in sport and likely future developments, it is necessary to consider the impact of other sectors and industries on the development of sport, most importantly, tourism and leisure. This section will outline the outlook of these sectors, and the likely effect on sport.

Tourism and leisure are strongly linked to sport. As a result of increasing work pressures, holidays and leisure time are becoming shorter and people are starting to invest more in their holidays, and increasingly see such holidays as a chance for self-development and to engage in specific activities. Hence the development of ‘wellness’ tourism and of activity-related tourism, including sports. Wellness tourism includes everything that nurtures and promotes health, including beauty treatments, spas, detoxifying, healthy eating and sports.

\(^{1}\) EZUS Lyon-1, EOSE and ENSSEE, 2004
holidays, among many other activities. A study carried out in England in 2000 estimated that approximately 1.1 mn overseas tourists and 2.2 mn long-stay domestic tourists’ purpose for visiting a region in that year was sports related.\(^2\) Spending associated with these tourists was approximately BP£37 mn covering admissions to sporting events or participation, as well as a further BP£154 mn for accommodation.

The general outlook for tourism for the coming years is positive. Tourism The World Travel and Tourism Council forecasts that travel and tourism activity is expected to grow globally by 4.2 % per annum in real terms between 2007 and 2016 (see Figure 3.1). Employment in the industry is likely to grow by 1.8 % by 2016.

\begin{figure}[h]
\centering
\includegraphics[width=\textwidth]{figure21}
\caption{World Travel and Tourism Total Demand (Cumulative Real Growth %)}
\end{figure}

The importance of sports tourism is also starting to be recognised in many countries, with policies being put in place to encourage its development. For instance, the Czech Republic is starting to invest in sport and wellness tourism in order to create a niche market for itself in this area. In November 2000 the government of the Czech Republic approved the State Programme of Tourism Support. The programme was designed as a long-term instrument of financial support for tourism. In 2002, the programme included sub-programmes for spa tourism and the creation of supplementary tourism infrastructure for sport and recreational use. The state provided approximately €1.4 mn for the programme in 2002\(^3\).

The leisure sector is also of growing importance in Europe and its development is strongly related to that of tourism. For example, the leisure and recreation market in the UK involved consumer spending of BP£83.93 bn in 2004, an 11.5% share of all UK consumer spending\(^4\). The global outlook for leisure is positive, as the improved general economic outlook has led to increased consumer spending on golf and other recreational facilities. Growth in fitness centres and similar establishments is also expected, driven by several factors. Ageing baby boomers are concerned with staying healthy, physically fit, and independent, and have this group

\begin{footnotesize}
\begin{itemize}
\item \(^2\) Cambridge Econometrics, 2003
\item \(^3\) Zachystalova, 2002
\item \(^4\) Key Note Publications, 2005
\end{itemize}
\end{footnotesize}
has become the largest demographic group of health club members\textsuperscript{5}. The reduction of physical education programs in schools, combined with parents’ growing concern about child obesity, has rapidly increased child health club membership. Membership among young adults has also grown steadily, driven by concern about physical fitness and funded by rising incomes\textsuperscript{6}.

2.4. Employment in Sport

The sports sector accounts for approximately 800,000 jobs within the 25 European Union member states, supported by almost 10 mn volunteers.\textsuperscript{7} The United Kingdom has the highest proportion of employment in the sports sector, compared with other European countries (0.94%). Other Western nations, including Ireland, Sweden and the Netherlands also have relatively high levels of employment in sport, while many Eastern European countries have a lower proportion of employed staff working in the sector (e.g. Poland, Hungary and Slovakia) (see Figure 2.2).

\textbf{Figure 2.2: Proportion of the Active Population whose main professional occupation is in the sports sector, EU-25}

As the sector grows, skills gaps in sport are beginning to occur throughout Europe. For example, a study by Sport England revealed that 28\% of sports companies in the West Midlands have skills gaps, which may be attributable to high growth in the sector.\textsuperscript{8}

In general, the qualification level of those working in the sector is mixed, partly as a result of the traditionally voluntary nature of much employment in sport. Just 15\% of those working in sport (i.e. those whose primary occupation is in sport) have a Bachelor’s Degree or higher, while just under half (46.2\%) have a secondary level or post-secondary certificate or diploma (see Table 2.2). Approximately a third have basic qualifications, such as general primary or secondary education. However, there are variations throughout Europe, with central and eastern European countries having higher qualification levels overall.

\textsuperscript{5} Ibid.
\textsuperscript{6} US Department of Labor, 2006
\textsuperscript{7} EZUS Lyon-1 et al, op. cit.
\textsuperscript{8} Sport England, 2004
Table 2.2: Highest qualification of sports sector staff, selected European countries

<table>
<thead>
<tr>
<th>Country</th>
<th>General Education, %</th>
<th>Cert/Diploma, %</th>
<th>Bachelor’s Degree or higher, %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>26.5</td>
<td>63.8</td>
<td>9.7</td>
</tr>
<tr>
<td>Belgium</td>
<td>20.0</td>
<td>40.0</td>
<td>28.0</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>7.6</td>
<td>81.5</td>
<td>10.8</td>
</tr>
<tr>
<td>Finland</td>
<td>33.2</td>
<td>60.7</td>
<td>6.2</td>
</tr>
<tr>
<td>France</td>
<td>50.9</td>
<td>31.9</td>
<td>9.7</td>
</tr>
<tr>
<td>Italy</td>
<td>13.6</td>
<td>62.9</td>
<td>21.4</td>
</tr>
<tr>
<td>Latvia</td>
<td>0.0</td>
<td>19.7</td>
<td>81.4</td>
</tr>
<tr>
<td>Lithuania</td>
<td>-</td>
<td>43.0</td>
<td>57.0</td>
</tr>
<tr>
<td>Portugal</td>
<td>62.3</td>
<td>28.7</td>
<td>9.0</td>
</tr>
<tr>
<td>Slovakia</td>
<td>9.1</td>
<td>59.1</td>
<td>29.5</td>
</tr>
<tr>
<td>EU Average</td>
<td>34.4</td>
<td>46.2</td>
<td>14.9</td>
</tr>
</tbody>
</table>

Source: Vocasport, 2004

The average qualification level of those working in sport in Europe compares unfavourably with overall qualification levels across all sectors in Europe. For example, the percentage of the total population in the EU-25 who had completed at least secondary school in 2005 was 68.9%, compared with just 61% of those working in sport.9

Relatively low income levels in the sector reflect the fact that the sector is characterised by a high number of part-time workers and by a low skills base. Sport-related employment generated almost BPE6 bn in disposable income in England in 2000.10 With approximately 400,000 employed in the sector, the average salary was £15,000. However, research carried out by the US Department of Labor suggests that there is a wide range between the highest and lowest salaries in the sector. The median salary of umpires and related workers was US$21,260 in 2004. The middle 50 per cent earned between $16,870 and $31,390. The lowest ten per cent earned less than $14,160 and the highest paid 10 per cent earned more than $44,140.11 There is a small proportion of professional sports players, such as soccer and rugby players who earn well in excess of this, although competition for such jobs is extremely intense.

Working Conditions of Sport
The working conditions in each of the two sub-sectors vary considerably:

Operations of Sports Arenas and Stadiums
As stated previously, this sub-sector includes managing and providing the staff to operate sports facilities, such as administrative staff, stadium or facility managers, etc. Many professions in this sub-sector require specialist knowledge, although these skills are highly transferable across sectors. Working conditions vary from profession to profession, although the seasonal nature of most sports requires flexibility from staff.

Other Sporting Activities
Professions within the second sub-sector, other sporting activities (including professional sports people, sports officials, referees, time keepers, coaches, talent scouts and support staff) are often characterised by long and irregular working hours, extensive travel and low rates of pay. Unsalaried (voluntary) positions are also

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9 Eurostat, 2005
10 Cambridge Econometrics, op. cit.
11 US Department of Labor, op. cit.
common. Higher-paid jobs are more widespread within professional sports, through public sector employment (such as within a local authority), or within second or third level academic institutions. These jobs are usually highly competitive, requiring high levels of experience (at least 3-5 years) and postgraduate qualifications.¹²

Figure 2.3 outlines the hierarchy of sport in terms of skills level, rates of pay and dedication required. At the top level are professional or elite sportspeople, along with their coaches, managers, support team and all related professions, whose level of dedication, skills requirements, and rates of pay are high. The skills level of semi-professionals is also high, although the level of dedication required from professional or the elite sportspeople is not always possible from semi-professionals. The majority of non-elite amateurs have a lower level of dedication, relative to that of professionals or elite sportspeople. The skills levels of those working with amateurs and those generally engaged in sport as part of another profession (e.g. secondary school teachers) is also lower than for professionals or the elite, though the qualifications required may be higher. While the level of dedication required and given by volunteers, along with their skills level, varies, they are included here as third from the top in order that their involvement in the sector should not be overlooked.

The diagram also demonstrates that the development of high level sport, particularly at the professional/elite level, can only occur if there is a wide catchment pool of promising young sportspeople who can move from the lower levels into this highly skilled elite group.

<table>
<thead>
<tr>
<th>Figure 2.3. Hierarchy of Sport</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skills Level</td>
</tr>
<tr>
<td>High</td>
</tr>
<tr>
<td>Professional/Elite sportsperson</td>
</tr>
<tr>
<td>Medium</td>
</tr>
<tr>
<td>Semi-professional</td>
</tr>
<tr>
<td>Low</td>
</tr>
<tr>
<td>Volunteer</td>
</tr>
<tr>
<td>Amateur/General Participation</td>
</tr>
</tbody>
</table>

¹² Ibid; Sport England, op. cit; EZUS Lyon-1 et al, op. cit.).
2.5. Recent developments in sport

The sports sector in Europe has grown significantly in the last few decades. Employment in sport has grown nearly 60% in the last 10 years, as a result of the growth of participation in sport. In this section, the key factors influencing the development of the European sports sector are described, including the level of participation in sport throughout Europe and the effects of globalisation, technology and ageing on the sector. The increased recognition of the social value of sport, the threat of performance enhancement, the impact of the public sector and the changing style of management in the EU are also discussed.

Participation in Sport

Participation levels in sport have increased significantly over the same period. A Eurobarometer study carried out in 2004 shows that a high proportion of Europeans in the 25 member states, 38%, reported that they played sport at least once a week, compared with 35% in 2003. The Scandinavian countries have the highest levels of participation rates in the EU, while southern European countries have the lowest (see Figure 2.4).

Figure 2.4. Percentage of Europeans who play sport 3 times a week or more (EU-15)

Another important element is that participation in sport is open to all socio-economic groups. Thus, the role of sport as a mechanism for social development is central to its importance for society. While some sports, such as sailing, are expensive, as they require costly equipment, others are easily accessible. For example, soccer clubs can operate with reasonably adequate sports pitch and the enthusiasm of a few dedicated individuals.

Growing diversification of those participating in sport

The recognised importance of sport, coupled with the move towards increasing globalisation, has had a significant positive effect on the development of sport in recent years. This can be seen through the diversification of the types of people participating in sport. There is evidence to suggest that traditionally less active groups, including women and people from lower socio-economic groups, are becoming more active. In

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13 Eurobarometer, 2004
addition, the nature of how people participate in sport has also changed, as people are now more inclined to take part in more individualistic sports, such as swimming, cycling, walking and weight training.\textsuperscript{14} To a large extent, this is as a result of the longer hours people are now typically working, giving them less time to dedicate to team-based sports. This means that service providers have had to offer a more flexible service to accommodate these changing needs, resulting in a growth in the number of fitness centres, personal trainers and home fitness programmes in recent years.\textsuperscript{15}

Sport can also benefit the international community, by allowing nations to showcase their talent and mix together in competitions, helping to break down cultural and social barriers.

Technology
New technology, such as performance enhancement software has enabled professional sportspeople to improve their performance. This type of software operates by providing coaches and professional sportspeople with feedback on their style or technique, and helps them to correct flaws in their performance. New materials have also led to improved performance among sportspeople.

Video refereeing has now become an integral part of the game in rugby (as well as American football), with calls to have this extended to other sports. For example, the use of video and other technologies in athletics and other sports makes it easier to identify the winner of a race.

Advances in technology have also changed how people view, or gain access to sport. Mobile phones now allow users to download video clips of sports’ results and the internet and phones allow people to receive match results instantaneously, bringing about new ways of advertising through sport.

The diagnosis and treatment of sports injuries has also become easier as a result of advances in medical technology. In many cases, this has lengthened the span of an athlete’s career.

Ageing
The ageing population of Europe is having a negative effect on the development of sport, as, typically, older people do not participate in sport to as great an extent as younger people. The Eurobarometer study showed that 60% of the 15-24 age group played sport at least once a week, compared to only 28% for those aged 55 and over.\textsuperscript{16}

Social Value of Sport
Many European governments are now recognising the need for policies that enhance the social value of sport. For example, a research report carried out by Ireland’s leading ‘think tank’, the Economic and Social Research Institute (ESRI), drew attention to the social capital produced through sport, including high levels of volunteerism, as well as the formation of social relationships.\textsuperscript{17} Approximately 15% of Irish adults volunteer for sport in some way, many of whom are older and may have formerly participated in the sport when they were

\textsuperscript{14} Coulter, 2004
\textsuperscript{15} Karlis, 2006
\textsuperscript{16} Eurobarometer, 2004
\textsuperscript{17} Delaney and Fahey, 2005
younger. Men tend to be involved in coaching or mentoring while women tend to help out with transport or kit maintenance. The same study revealed that 60% of men and 51% of women considered that making new friends and acquaintances was an important benefit they gained from sport. Sport is also important for breaking down socio-economic boundaries. For example, the Gaelic Athletic Association (responsible for organising indigenous sport in Ireland) is currently in the process of hiring a cultural sports officer to encourage the participation of people of non-Irish origin. An organisation called Sport Against Racism in Ireland (SARI) is also helping minority ethnic groups in Ireland to participate in society through sport. The Irish Sports Council has also recognised the value of social capital in sport, and has made further development in this area a priority for sport in Ireland.  

Performance Enhancement

One of the most controversial aspects of sports technology is the increase in biotechnology and performance enhancing drugs. In spite of a commitment from the International Olympic Committee in 1981 to eliminate doping in sport through a uniform testing system, drug use to enhance performance has increased significantly. It has been argued that the substantial rewards available for athletes who perform well are an incentive to use drugs to excel in sport. In addition, it has been suggested that national sports bodies have done little to prevent doping in sport for economic reasons:

Only a small minority of international and national Olympic committees did anything at all (following the 1981 IOC Congress) to prevent doping. These organisations feared, among other things, losing their market share to other sports. The fear was that an effective fight against doping could give an advantage to rival sports in terms of prestige and media coverage - meaning less money in the organisations’ bank accounts.

As a result of changes in the regulations, there is now an onus on all governments to comply with IOC regulations, thus sharing the cost of testing and responsibility.

The increasing use of technology in sport and the need to regulate its use in the interest of fairness and tradition will lead to the creation of new occupations in monitoring sports performance and regulation. The rate of introduction of new technologies is also rapidly speeding up.

Importance of the Public Sector

The public sector historically has played an important role in sport, both in helping the sector to develop and also as it is one of the sector’s major employers. In 2000, local authorities in England spent £750 mn on sport-related activities, which is more than the estimated £300 mn they received in income from these activities. This highlights the fact that the sector is not self-financing. Of the 400,000 employed in jobs directly related to sport in England, approximately 37,500 were estimated to have been in sports-related employment in the local authorities, of whom 14,000 were employed in secondary schools.

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18 Irish Sports Council, 2003
19 Trout and Kazlauskas, 2004
20 Skasket, 2006
21 Cambridge Econometrics, op. cit.
There are varying levels of involvement by the public sector in sport in the different European countries. This is influenced by whether or not a country’s political structure is federalised or more centralised. As international sports regulations impose a state-based representation, sport strongly resists federalisation, and indeed, the highly-federalised Belgium appears not to have a national sports system. However, a federalised system often results in the sports sector being more highly-developed at a local level. This in turn helps the development of sport at national level, as it provides an opportunity for a greater number of amateur sportspeople to aim to become a professional or elite performer.

While it is clear that sport is not generally a profitable area of activity for the public sector, elite sports events, such as the recent World Cup, can generate enormous revenue. Tourism in Germany was expected to raise, both during and after the World Cup. For instance it was expected to increase by as much as 1.7% in the number of overnight stays for 2006 as a whole.

The entire sector is going to be increasingly affected by government legislation and regulation, including health and safety thus increasing insurance requirements.

**Management System of Sport in the EU**

European countries are gradually moving away from a system where the public sector plays a large role in managing sport, including regulating the sector, to a more market led system, where the government is more removed from decision-making processes. The role of the government is increasingly moving to one where the state facilitates the development and maintenance of a sports framework thus enabling competitive for-profit companies to establish themselves and operate effectively with the sector. Such a system can prove beneficial for the economy. However it can reduce some of the benefits of sport, as has been proven in the United States, where the professional sector is flourishing but the amateur sector is weak.


In 2005 a strategic group European Sport Workforce Development Alliance was initiated in order to improve cooperation among sport organisations at European, regional and local levels by disseminating outcomes of the above mentioned projects and sharing experience.

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22 EZUS Lyon-1 et al, op. cit.
23 Germany Tourism, 2006
24 EZUS Lyon-1 et al, op. cit.
Strategic European sport development documents are White Paper on Sport and Pierre de Coubertin Action Plan (2007). The latter document discusses public role of sport, its economic aspects and further actions for the sector. It is stressed that sport increases human capital due to its important role in formal and non-formal education. It also encourages to support sport and physical activity as well as to use various political initiatives in education and training including development of social and civil skills based on European Parliament and Council recommendation on key competences for lifelong learning adopted in 2006.

Summary
Section 5 has outlined many of the important benefits of sport to the economy and society. Figure 2.5 illustrates the various roles sport plays, from local to international levels. Participation in sport has strong health benefits as well as supporting broader community development. Sport can also improve international relations through improving cultural linkages. The social, economic and educational benefits are also important.

These benefits have grown as European governments have increased their investment in the sector and have increasingly recognised the positive role that it can play.

2.6. Factors Influencing the Future Growth of the Sports Sector
As sport has only recently been recognised as an economic sector, there has been limited research carried out on its development to date, or on its likely future development. Therefore, in order to fully assess the likely
future developments of the sector, further research is needed. However we do know that the development of the sector will largely be determined by levels of economic growth and prosperity.

**Economic Prosperity**
Economic prosperity is particularly important for the development of sport as an economic activity. The development of the sports sector relies on the ability of both participants and spectators to spend a growing percentage of their disposable income on the sector. In addition, economic downturns are likely to mean that governments will decrease spending on sectors like sport which are not vital to the development of the economy.

Forecasts for Europe’s economy for the next few years are positive, with commentators indicating that the signs of slow recovery seen in recent years are likely to continue. World trade growth is expected to exceed 7% in both 2006 and 2007, and growth in the Euro zone to grow from 1.4% in 2005 to 2% in 2006 and 2007. Employment has been growing steadily over the last few years and is likely to continue to do so at least in the short-term. Unemployment is likely to decrease from 8.1% in 2006 to 7.8% in 2007. However, there are a number of factors threatening this outlook, including volatile oil prices, resulting in high inflation, and increased interest rates.

**Outlook for the Sports Sector**
On balance the outlook for the sports sector is positive, the indications being that sport is likely to continue to grow as a sector, as forecasts for the European economy are positive. Growth in other sectors of the economy will also help the sports sector to grow. Overall those involved in the sector are optimistic. For example, Sport England’s research on employment in the West Midlands in 2004, shows that employers expected their workforce to grow by 9% over the coming three years.

Other key factors affecting the development of the sports sector in particular countries are the ability and desire of governments to invest in the sector.

**Investment in the Sector**
The big decision most governments need to make is whether to invest in sport for general participation or for elite athletes. After all, as already discussed, it is the elite sportspeople that are more likely to give investors a return on their investment. However, it is important to also recognise that elite sport cannot develop unless there is a wide pool of talented athletes who have proven their potential and gained experience at lower levels. Therefore, investment in elite sport can only come once the basics have been put in place.

Governments have long recognised the health benefits of sport, and, in light of the increased risk of rising obesity levels, many countries have introduced campaigns to promote participation in sport, notably the UK, Australia, Ireland and Canada. This is a further incentive for governments to invest in sports for everybody, to encourage cost savings in healthcare at a later date.

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25 Hurley, 2006; Economist Intelligence Unit, 2006
26 Hurley, op. cit.
27 Euroframe, 2006
28 Sport England, op. cit.
A threat to the development of sport in the next few years is the lack of trained officials. For example a study in the West Midlands in the UK found that skill shortages are occurring in managerial, IT and customer service positions. This is reportedly due to a lack of suitable candidates with the required specific skills and to the low number of applicants. Therefore, there is a need for further encouragement of more officials into the sector. The West Midlands report recommends highlighting the personal fulfilment those working in the sector receive to encourage more people to enter the sector.

Overview

Overall, it can be seen that the prospects of sport are likely to be positive, particularly if investment is made in the right areas, and to encourage general participation, and to optimise the opportunities for a wide range of promising young athletes, and if basic structures have been put in place.

2.7. Impact on Employment

It is difficult to be very specific about future employment trends in the sports sector, given the limited analysis carried out to date. However, it is likely that present trends will continue over the next ten years, particularly in relation to employment conditions.

Many of the jobs in the future are likely to continue to be part-time and low paid. There will continue to be intense competition for a small number of higher paid jobs, meaning that significant employment growth will be in semi-professional or amateur sports activities. However the likely growth of commercial sport may result in a loss of experienced personnel at other levels of the sports sector. There is likely to be an increase in demand for occupations related to sports activities such as sports psychologists, physiotherapists, sports commentators, fitness trainers etc.

The increasing demand for flexibility within service provision will require even higher levels of commitment from those working in the sector, in terms of availability and willingness to travel.

The reluctance of young people to make their careers in sport, due to the unsociable hours, low pay and difficulties in securing employment also represent a real threat to the development of the sector, although this has may be ameliorated by the largely positive image of sportspeople in modern economies.

Table 2.3 summarises the opportunities and threats facing employment in the sports sector in the future.

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Growing recognition of economic and social value of sport</td>
<td>Decrease in participation in certain sports – longer working hours, rising obesity levels</td>
</tr>
<tr>
<td>Opportunities to gain valuable experience as a result of the voluntary nature of sport</td>
<td>Economic downturns which limit potential state investment in sport</td>
</tr>
<tr>
<td>Vocational aspect of sport and positive image of sports people resulting in employees</td>
<td>Difficult working conditions likely to turn potential workers away</td>
</tr>
</tbody>
</table>

29 ibid.
30 US Department of Labor, op. cit.
2.8. Impact on Skills, Training and Education

Qualifications Levels
Formal training and education in sport in Europe is currently underdeveloped, resulting in significant skills gap throughout Europe. Where formal programmes do exist, education and training programmes, particularly in universities, have near autonomy in the design and content of courses and so qualifications offered by training systems are often not seen to match current market requirements.

Employers typically require staff to have second or third level certificates or diplomas, whereas Bachelor's degree programmes are one of the most common qualification types. This means that some staff working in the sector are highly qualified, but not appropriately qualified for the jobs on offer. There is also a lack of emphasis on lifelong learning and apprenticeships. In addition, the lack of standardised European educational qualifications can hinder mobility, and so greater transparency and quality assurance of training programmes are required. For example, just 1.5% of all enrolments in post-secondary training courses were in sport and leisure subjects in England in 2004 with 28% of companies in the West Midlands having skills gaps.

Role of the public sector
Much of the fragmentation in current training and education provision is due to the growing market-led nature of the sector, with a subsequent lack of central management or regulation of training in each country. If the situation is to improve, public sector bodies must recognise their responsibility to ensure adequate, recognised training programmes are available to staff working in the sector, as well as to future employees.

Barriers to training
As many of those working in sport are volunteers, there is little opportunity for them to avail of training courses. A report published recently in the UK highlighted some of the barriers faced by employers in relation to training provision:

- A lack of awareness of training programmes
- A lack of analysis of training needs
- High cost (both monetary, and freeing up staff for the duration of the course)
- Lack of locally based training facilities/experts

The growing diversity and sophistication of the sector, means that there is an increasing need for generic training, including training in human relations, management, teaching, health and safety, as well as for specific training (refereeing/coaching/participating in a particular sport). Suitable, affordable and accessible training needs to be available at each level of sport - professional/elite, semi-professional, and amateur as well as for volunteers.

31 EZUS Lyon-1 et al, op. cit.
32 Sport England, op. cit.
33 SkillsActive, 2005
Training requirements for the elite
Small countries such as Ireland traditionally do not have a high level of success when competing internationally, either at the amateur or elite levels. This puts Ireland at a disadvantage in trying to train and develop promising young athletes to compete successfully, as there are few athletes or coaches with the knowledge of what skills and standards are required to achieve success, in terms of diet, training strategy, fitness and technique development. This further limits the development of elite or high-performing amateur sport. Further training is thus required for coaches to train athletes performing at a high standard, as well as action to recruit coaches from abroad, or who are “demonstrably world class in their discipline” with a proven track record to inject further knowledge into the sector. There is also a need to develop teams of professionals, including medical, technical skills, fitness, lifestyle management and physiotherapy to help such young athletes develop.

Non-traditional training requirements
The role of sport in creating new social relationships and breaking down traditional barriers means that employees also need to be trained in the area of equality, while new policies around working with children also require staff to undergo stringent training and certification. Public relations and communications also need to be built into training programmes to help the development of sport in general, and technology skills, both general and specific, are required.

If the sports sector is to develop in the future and address new challenges there is a clear need for European governments to put systems in place to ensure that the required training and educational provision is available at all the different levels required and that such systems evolve in a way that reflects changing needs.

Overview
Table 2.4 outlines the skills needs of each group.

<table>
<thead>
<tr>
<th>Elite/professional/semi-professional</th>
<th>Medium</th>
<th>High turnover, but high competition for limited places</th>
<th>Key Skills Needs</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Specific sport-related skills</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Referees/umpires</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Sports managers</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Coaches</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Talent scouts</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Sports communicators</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Performance monitors/ regulators</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Digital technology/IT specialists</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• PR experts</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Sports officials</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Specialists (e.g. nutritionists, physiotherapists, psychologists, fitness trainers)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Customer service personnel</td>
</tr>
</tbody>
</table>

Table 2.4. Outlook for Employment and Skills in the Sports Sector

34 Wharton Consulting, 2005
### Amateur/General

| Increase in disposable income | • Specific – sports related skills |
|                             | • Lifeguards                       |
|                             | • Fitness instructors              |
|                             | • Club managers                    |
|                             | • Stadium and facilities managers  |
|                             | • Development managers             |
|                             | • Lecturers and tutors              |
|                             | • Customer Care professionals      |
|                             | • HR managers                      |
|                             | • Health and safety experts        |
|                             | • Managers and business leaders     |
|                             | • Ground staff                     |
|                             | • Nutritionists                    |

| Volunteers | • Sports managers                  |
|            | • Specific – sport skills          |
|            | • Health and safety experts        |
|            | • Sports teachers                  |
|            | • Coaches/Mentors                  |
|            | • Nutritionists                    |
|            | • Life guards                      |

| Volunteers | • Performance monitors             |
|            | • Sports regulators/inspectors     |
|            | • International agents             |
|            | • Public relations experts         |

### Volunteers

<table>
<thead>
<tr>
<th>Volunteers required at every level to keep sporting bodies and clubs in operation</th>
<th>• Specific – sport skills</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Health and safety experts</td>
</tr>
<tr>
<td></td>
<td>• Sports teachers</td>
</tr>
<tr>
<td></td>
<td>• Coaches/Mentors</td>
</tr>
<tr>
<td></td>
<td>• Nutritionists</td>
</tr>
<tr>
<td></td>
<td>• Life guards</td>
</tr>
</tbody>
</table>

### Related occupations

<table>
<thead>
<tr>
<th>Dependent on growing professionalism and internationalisation of the sector</th>
<th>• Performance monitors</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Sports regulators/inspectors</td>
</tr>
<tr>
<td></td>
<td>• International agents</td>
</tr>
<tr>
<td></td>
<td>• Public relations experts</td>
</tr>
</tbody>
</table>

### 2.9. Summary

This section has shown that the sports sector in Europe has developed significantly throughout the last half century, and that growth looks set to continue in the short term at least. The benefits of sport for society are many and highlight the importance of governments continuing to invest in the sector. While elite or professional sport may be more lucrative for investors, it is clear that investment is first needed at lower levels in order to create a wide pool of potential elites, as well as to provide opportunities for participation in sport for as many people as possible.

While the employment conditions of the sector are demanding, employees see it as something of a ‘vocation’, and staff continues to work in the sector in spite of the difficult conditions. However, in recent years, it has become apparent that younger staff is leaving the sector, due to its difficult conditions. This indicates that employers need to invest in staff to ensure the sector can develop to its full potential.

The future development of the sports sector in Europe is largely dependent on the training and education of staff within a structured framework, with standardised systems in place, needs-led training and education programmes, career and progression systems and with the public sector taking the lead in ensuring adequate provision of such a framework or system.
3. STATISTICAL CHARACTERISTICS OF THE SPORTS SECTOR

3.1. Introduction
This chapter provides a short overview of the sports sector in Lithuania. It covers some information about the SS enterprises, employment and performance indicators. The analysis was performed on the basis of statistical data specially developed for the study. In addition, the analysis used some secondary data, including studies, surveys and other publicly available information about the SS and the Lithuanian economic development.

3.2. Briefly about the Sports Sector
The Physical Education and Sports Strategy of 2005-2015 of the Republic of Lithuania and other publicly available information states the following:

- The role of sports is becoming more recognised. That is also seen from the attention of international organisations paid at the sports sector. For example, the European Union announced the year 2004 as the European Year of Education through Sports and the United Nations announced the year 2005 as the International Year of Sport and Physical Education.
- Half of the population aged 7-80 does not exercise. About 32 % of the population exercises individually and 16 % of it attends organised sports training.\(^{35}\) As compared to 2001, the public attitude towards sports has not changed. All the more relevant is the main objective, which is implementation of fitness and sports programmes for everyone, performance of awareness-raising campaigns highlighting the importance of physical training and paying special attention at healthy lifestyle in all education and training establishments.
- Due to the shortage of investment, the sports facilities available at general education schools, vocational training and education establishments as well as high schools are inadequately equipped to attract residents, sportspersons or the youth. The old sports facilities lack sports gear and equipment, whereas the new ones are quite expensive and unaffordable to quite a share of the population.\(^{36}\)
- The current state of the national economy is unable to ensure the optimum funding for the development of the sports system. As a result, the implementation of the Physical Education and Sports Strategy of 2005-2015 cannot be carried out at full speed.
- Small earnings offered to physical education and sports professionals in the public sector, particular in the beginning of their career, make them divert to other activities or get re-trained.
- With the Asian and African governments investing more into training of highly professional athletes and construction of sports facilities, the international competition is rapidly growing.
- A substantial number of professional athletes become coaches after their professional career because they have no other additional qualification.

\(^{35}\) Report on the Survey of the Attitude held by the Lithuanian population aged 7-80 towards Physical Training Exercises, Sports and Sport Habits, UAB RAJT, 2007

\(^{36}\) According to the data of the Sports Information Centre, in 2006, the total number of sports facilities in Lithuania was 5,160. As compared to 2005, the number of sports facilities went up by 0.9 % (+48).
• Due to small salaries very few sports professionals work under their speciality after graduation from higher education establishments. Sports teachers and coaches at school are ageing, which means the likely shortage of such kind of professionals in the future.
• Modern technologies and their application in the sports increase the need for professionals with new type of competence.

The main prospects for the SS development are associated with the following:
• The improving national standard of living and increasing expenses on recreational activities and consumption. According to the data of the Lithuanian Statistics Department, household expenditure on free time and culture accounted for 4.4 % in 2004, increasing to 5.2 % in 2006.
• Promotion of a healthy life style and sports training. With the increasing popularity of healthy life-style, more and more people exercise. The data of the Lithuanian Sports Information Centre (http://www.sportinfo.lt) confirm the trend pattern. According to it, during the period of 1998-2006, the number of people working out in sports clubs increased from 53,400 to 92,000 persons, whereas the number of sports clubs went up from 973 to 1353.
• Implementation of the 2005-2015 Physical Culture and Sports Strategy of the Republic of Lithuania. The strategy provides for the following directions: physical education of the population, development of sports for all, development of different sports, training of highly professional athletes, improvement of sports management and legal framework, training of specialists and upgrading of their qualifications, development of sports facilities and investment, etc.
• The role of the state and investment. Due to the specific nature of the sector, state and municipal budgets are key sources of its funding (e.g. in 2006, state and municipal budgetary funds accounted for 66 % of income of city, regional and municipal sports organisations and as much as 88 % of income of sports training establishments). The sports sector development largely depends on the improvement of the legal framework providing offering better conditions for supporting sports. For example, prohibition of alcohol commercials and advertising reduced the support of private enterprises for sports and culture. In addition, the number of sports programmes on television dropped which had a negative impact upon making sports popular among the youth.
• The European Union financial support, providing new technologies to the area of physical culture and sports, informing the wider society about the benefits of sports and raising qualifications among the sector employees.

According to publicly available information, the main indicators effecting the future development of the SS include the following:
• positive economic changes;
• growing customer expectations and a need for a new type of services;
• awareness of sports as a cultural and social phenomenon;
• maintenance of health as the main value;
• technological advancement;
• discrepancy between the qualification of employees and the needs of the sector.
3.3. Enterprises

**Distribution of enterprises by sub-sectors and size.** On 1 January 2006, the Registry of Economic Entities included 1502 enterprises which named sports activities as their main type of activity. Out of that number, 447 enterprises had staff and turnover. The remaining enterprises were either not in operation or the Statistics Department had no information about their activities. This chapter will examine the indicators of those enterprises which were actually operating. Due to the scarcity of statistics about the matter, only general indicators of the SS enterprises will be subject to analysis, whereas the trends in sub-sectors will be touched upon only indirectly. Since the Registry of Economic Entities was subject to review in 2005, the statistical data of previous years will not be examined.

The structure of the sports sector and the number of enterprises is shown in Table 3.1.

<table>
<thead>
<tr>
<th>Sub-sector</th>
<th>Activities under NACE</th>
<th>Enterprises by Number of Employees</th>
<th>In total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Up to 9</td>
<td>From 10 to 49</td>
</tr>
<tr>
<td>Operation of Sports Arenas and Stadiums (SAS)</td>
<td>Operation of sports arenas and stadiums (92.61)</td>
<td>22</td>
<td>15</td>
</tr>
<tr>
<td>Other sporting activities (SA)</td>
<td>Other sporting activities (92.62)</td>
<td>366</td>
<td>39</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td>388</td>
<td>54</td>
</tr>
</tbody>
</table>

The fact that the Registry of Economic Sectors contain only 447 enterprises involved in sports shows that the sports sector in Lithuania is only beginning to take shape as a separate sector. According to the Lithuanian Sports Information Centre ([http://www.sportinfo.lt](http://www.sportinfo.lt)), in 2006, there were 1,795 sports organisations (including sports clubs, sports schools, sports centres, sports facilities, sports federations, associations, union and other organisation and bodies involved in sports and having the status of a legal entity). Out of that number, 1,355 were sports clubs. In addition, the number of sports facilities was 5,160. This means that sports organisations are distributed among different sectors (e.g. education and tourism) and sports activities are concentrated in the enterprises which carry out activities that are not related to sports.

8 % of the enterprises specialise in the area of SAS. The sector is predominated by small enterprises (where the number of staff is up to 9 people), accounting for 87 % of all the enterprises operating in the sector. However, in the overall structure of the SAS enterprises, small enterprises (having 10 - 49 employees) make up almost 40 %, whereas in the OS area, small and medium-size enterprises (from 50 to 249 employees) account to as little as 9 %.

**Geographical distribution of enterprises in Lithuania.** The biggest concentration of sports enterprises was in Vilnius and Kaunas counties. In other counties, the distribution of sports enterprises ranges from 3 to 14 % (Fig. 3.2).
3.4. Employment in the Sector

*Distribution of Employees by Sub-sectors.* According to the statistical data of 2006, the sports sector employed 2,300 people. That is a very small share of the employed (constituting 0.15 %) as compared to the overall Lithuanian economy. In Europe, the share of the population employed in sports is higher (in the UK, it is the highest, constituting 0.94 %), whereas in Eastern Europe countries it is similar to the Lithuania (see Fig. 2.2). Admittedly, according to the data of the Lithuanian Sports Information Centre, sports organisations employed a higher number of employees (in 2006, there were 2,285 coaches, 4,213 physical culture and sports professionals and 3,847 unpaid workers). The difference in the data occur as a result of different methodology used to collect them.

By looking at the number of employees according to sub-sectors, 82 % of workers are employed in the OS sub-sector. Analysis of distribution of employees in enterprises of different size shows that the majority of employees work in small enterprises (Fig. 3.3).

*Fig. 3.3. Change in Number of Employees working in Sports Sector by Sub-Sectors and Size of Enterprise*
Employee supply and demand\textsuperscript{37} (the unemployed and vacancies). The Lithuanian Labour Exchange records a relatively small number of the unemployed who previously worked in the sports sector. Furthermore, the number of vacant posts offered in sports enterprises is also relatively insignificant. From 2003 to 2006, the number of the registered unemployed coming from the sports sector was slightly decreasing.

The supply of vacancies in the sector has been relatively stable and the projection is that in 2007, the number of vacancies will increase by more than 60\% (Fig. 3.4). In 2006, the tension level (\textit{i.e. the ratio between vacant posts and the number of the unemployed}) in the sports sector stood at almost 0.4 and was smaller than the relevant national indicator (0.9). This means that the quantitative supply of employees in the sports sector is exceeding the demand for them.

\textit{Fig. 3.4. Number of the Unemployed and Supply of Vacancies}

Little statistics make it difficult to analyse the trends of the tension level in the groups of occupation posts. In 2006, the biggest tension was seen in the group of administrative staff and other sports related professionals. The prediction is that the tension level in this group will increase reaching more than 1.

3.5. Performance Indicators

\textit{Turnover.} According to official data, in 2005-2006, the turnover was increasing in the sports sector (Fig. 3.5). This trend is characteristic of both sub-sectors.

\textsuperscript{37} The source is the data specially developed by the Lithuanian Labour Exchange.
Fig. 3.5. Change of Turnover in Sports Sector, thous. Litas

Fig. 3.6 provides data about the change of the average monthly gross earnings in the SS sub-sectors and the national economy. In the recent years, earnings have gone up in the SAS sector, whereas in the OS sector, they have slightly diminished. The SAS sub-sector earnings are more or less in line with the national average monthly gross earnings, whereas those of the OS sub-sector are among the smallest in the country (lower salaries are offered only in the hotel and restaurant sector).

Fig. 3.6. Change of Earnings (Average Monthly Gross Earnings) by Sub-Sectors, Litas

Share of the National Gross Value Added (further referred to as the GVA). According to the data available to us, the gross value added created by the OS sub-sector has remained almost the same in the recent five years (in 2001, it accounted for 0.1 % and in 2006, it made up 0.09 % of the total GDP). Separate data about the growth of the value added in the SAS sub-sector were not provided. As compared to the other European Union member states, the Lithuanian indicator is low. According to experts, the sports sector account for approximately 1.6 % of the GVA. These data show that the Lithuanian sports sector is only beginning to take shape.

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38 pre-tax earnings
39 Vocasport, 2004
3.6. Development Trends

Data about the predicted number of enterprises operating in the SS and the staff working in them as well as their future turnover (in 2007-2011) are shown in Table 3.2. The forecasts were made by using regressive and autoregressive models, examining the overall trends of development of the Lithuanian economy and historical statistics. The forecasts for 2007-2011 suggest the growth in the sector. The number of enterprises, turnover and productivity should experience a significant increase, whereas the number of employees should remain the same.

Table 3.2. Future Forecast of SS Development

<table>
<thead>
<tr>
<th></th>
<th>2005</th>
<th>2006</th>
<th>Change (occasional)</th>
<th>Forecast for 2011</th>
<th>Change (occasional)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of enterprises</td>
<td>454</td>
<td>447</td>
<td>↓0.83</td>
<td>624</td>
<td>↑+1.40</td>
</tr>
<tr>
<td>Number of employees</td>
<td>2,123</td>
<td>2,312</td>
<td>↑1.09</td>
<td>2,389</td>
<td>↑+1.03</td>
</tr>
<tr>
<td>Turnover (thous. Litas)</td>
<td>60,569</td>
<td>70,123</td>
<td>↑+1.16</td>
<td>15,7173</td>
<td>↑+2.24</td>
</tr>
<tr>
<td>Productivity (turnover/number of employees)</td>
<td>30.00</td>
<td>30.33</td>
<td>↑+1.01</td>
<td>65.79</td>
<td>↑+2.17</td>
</tr>
</tbody>
</table>

↑ - increase; ↓ - decrease

3.7. Summary

- The role and significance of sports is becoming more recognised both by Lithuania and the EU. An additional indicator of that is the attention paid by international organisations at the sports sector.
- Half of the population aged 7-80 neither exercises individually nor attends any organised sports training. All the more relevant is the objective to implement fitness and sports programmes for everyone, paying special attention at healthy lifestyle in all education and training establishments.
- Small earnings offered to physical education and sports professionals in the public sector, particular in the beginning of their career, make them divert to other activities or get re-trained.
- Sports teachers and coaches at school are ageing, which means the likely shortage of such kind of professionals in the future.
- The main prospects for the SS development are associated with the following: the improving national standard of living, more time spent on recreation, higher consumption expenses; promotion of a healthy lifestyle and sports training; implementation of the 2005-2015 Physical Culture and Sports Strategy of the Republic of Lithuania; the role of the state and investment; and financial support provided by the European Union.
- The main indicators effecting the future development of the SS include the following: positive economic changes; growing customer expectations and a need for a new type of services; awareness of sports as a cultural and social phenomenon; maintenance of health as the main value; technological advancement; discrepancy between the qualification of employees and the needs of the sector.
- In 2006, the sports sector (under NACE classification, activity 92.61, Operation of Sports Arenas and Stadiums, and activity 92.62, Other sporting activities) had 447 actually operating enterprises, including
only 8 % of the enterprises specialised in the area of SAS. The sector is predominated by small enterprises (where the number of staff is up to 9 people). They made up 87 % of the total number of the sector enterprises.

- According to the statistical data of 2006, the sports sector employed 2,300 people. That is a very small share of the employed (constituting 0.15 %) in the overall Lithuanian economy. The tension level (i.e. the ratio between vacant posts and the number of the unemployed) in the sports sector stood at almost 0.4 and was smaller than the relevant national indicator (0.9). This means that the quantitative supply of employees in the sports sector is exceeding the demand for them. In 2006, the biggest tension was seen in the group of administrative staff and other sports related professional. The prediction is that the tension level in this group will continue to increase.

- The difference in data produced by a variety of sources about the number of enterprises operating in the sports sector and the number of staff employed in them shows that the sports sector enterprises are distributed among other sectors (education and tourism) and that sports activities are concentrated in the enterprises which carry out activities that are not related to sports.

- In recent years, the turnover of the sports sector has been increasing.

- In the recent years, earnings have gone up in the SAS sector, whereas in the OS sector, they have slightly diminished. The SAS sub-sector earnings are more or less in line with the national average monthly gross earnings, whereas those of the OS sub-sector are among the smallest in the country (lower salaries are offered only in the hotel and restaurant sector).

- According to the data available to us, the gross value added created by the OS sub-sector has remained almost the same in the recent five years (in 2001, it accounted for 0.1 % and in 2006, it made up 0.09 % of the total GDP). As compared to the other EU member states, the Lithuanian indicator is low. According to experts, the sports sector in other European countries account for approximately 1.6 % of the GDP.

- Predictions for 2007-2001, which were specially developed for study, suggest a significant growth in the number of enterprises, turnover and productivity.

- The comparison of the Lithuanian situation to the trends of development in the EU shows that the Lithuanian sports sector is only beginning to take shape as a separate sector. In 2006, the value added created in the SAS sector accounted for 0.09 % of the GDP and remained almost the same since 2001. As compared to the situation in the sports sector of other European countries, it accounts there for approximately 1.6 % of the GDP. For the sector to develop, its needs investment into making it popular, upgrading of staff qualifications, renovation of sports facilities and modernisation of technologies.
4. CHARACTERISTICS OF THE SECTOR BASED ON SURVEY FINDINGS

4.1. Introduction

This chapter will describe the sports sector on the basis of the social survey findings. In addition, it will analyse the trends of the SS enterprise activities and demand for staff in the sector.

The sample for the postal questionnaire survey was selected on the basis of the data taken from the Registry of Economic Entities, as well as by looking at the type of the prevailing economic activity (according to the statistical classification NACE) and the enterprise size. The total number of enterprises which were sent a questionnaire was 996. At the time of the survey (May 2006) all of them were included in Registry and the main activity was sports. Out of that number, 38 enterprises were from the SAS sub-sector (Operation of Sports Arenas and Stadiums) and 958 enterprises were from the OS sub-sector (Other sporting activities). All the participants of the postal questionnaire survey were asked to return the filled out questionnaires after several weeks. When the questionnaires were sent out to the respondents, telephone calls were made to remind them about the deadline for sending the questionnaires back.

As mentioned in Chapter 3 of the present study, quite a number of enterprises included in the Registry of Economic Entities had neither staff nor income. This fact was confirmed after making calls to the respondents. It appeared that some of the enterprises registered as hunting and fishing clubs or sports unions were not actually in operation.

The survey managed to get a sufficient level of response (16 %). The data about the distribution of the response level by sub-sectors and size of the enterprise are presented in Table 4.1.

Table 4.1. Distribution of Response Level by Sub-sectors and Size of Enterprise

<table>
<thead>
<tr>
<th>Number of employees</th>
<th>Number of enterprises which were sent a questionnaire</th>
<th>Response level %</th>
<th>Number of enterprises which were sent a questionnaire</th>
<th>Response level %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 9</td>
<td>22</td>
<td>42%</td>
<td>920</td>
<td>12%</td>
</tr>
<tr>
<td>From 10 to 49</td>
<td>15</td>
<td>100%</td>
<td>36</td>
<td>45%</td>
</tr>
<tr>
<td>From 50 to 249</td>
<td>1</td>
<td>*</td>
<td>2</td>
<td>100%</td>
</tr>
<tr>
<td>250 and more</td>
<td>-</td>
<td></td>
<td>-</td>
<td></td>
</tr>
</tbody>
</table>

*The enterprise refused to take part in the survey.

The interviews took place with the respondents from the enterprises recommended by the sport sector expert. The total number of enterprises interviewed was 11 (including 4 enterprises from the SAS sub-sector and 7 enterprises from the OS sub-sector).

4.2. Performance Indicators

Characteristics of enterprises. According to the social survey findings, the sector is predominated by ‘independent economic entities’ (as mentioned by 69.7 % of the respondents). 11.2 % of the respondents
mentioned they were a part of a ‘larger network’. All the enterprises are of the Lithuanian origin. The
distribution of answers about the start of operation is quite even (Fig. 4.1).

*Fig. 4.1. Start of the Operation of the Enterprise as said by the Respondents*

![Diagram showing the distribution of responses about the start of operation for the enterprises.](diagram)

*Provision of new Services*. In the recent two years, 40 % of the SS respondents said they provided new
services. The most common to mentioned were adult and children training (31 % of the respondents said they
provided the service), trade in sports equipment and food supplements (28 % of the respondents), organisation
of competitions and recreational services (19 %), organisation of activities and taking orders by the internet (14
%).

*Assessment of change in the services market*. According to the respondents interviewed, the market of
products and services increased in the year 2006. The main reasons for that is the increasing standard of
living and investment into infrastructure. The majority of the respondents predict that the same trend will
remain in the upcoming three years, i.e. the services market will be growing.

*Competition*. The lion’s share of the respondents (46.5 %) from both sectors said they had few competitors on
the local level. As little 15 % of the SS enterprises said they faced strong competition.

*Change in turnover*. According to the majority of the respondents, turnover increased in 2004 - 2006. The
growth is also anticipated in 2007. The findings obtained coincide with the trends suggested by statistical data.

*Business impediments*. The biggest business impediments in the SS, as mentioned by the respondents, are
low standard of living, legal regulations and tax system. Few enterprises (making up approximately 17 %) also
mentioned the shortage of employees and the lack of competence on the part of staff as an obstacle to a
successful business development.

*Use of modern technologies*. Modern technologies are used by almost 66 % of the SS enterprises and 49 % of
enterprises are planning to use such technologies in the future. The most frequently used technologies include
fitness trainers, video and audio equipment, and public information equipment. Enterprises also plan to apply
these technologies, along with the testing equipment, in the future. The data about the modern technologies which are currently used and planned to be applied in the future are presented in Fig. 4.3. According to the respondents, the application of modern technologies will help increase the number of sports professionals, the overall level of professionalism among all type of employees, creativity among managers and sports professionals and labour productivity among all levels of employees.

Fig. 4.3. Distribution of Answers by the Respondents about the Current and Planned Use of Modern Technologies

4.3. Employees

Employees. According to the statistical data specially developed for the study, the SS employs approximately 2,000 employees. The survey findings confirmed the figure. Women account for 30% of all the SS employees. The share of part-time workers constitute 27% of all the people employed in the SS.

Distribution of Employees by Groups of Occupation Posts. According to the social survey data, the most numerous group in the SS is professionals. (making up 49%). A detailed distribution of staff by groups of occupation posts is presented in Fig. 4.4.

Fig. 4.4. Distribution of Employees by Groups of Occupation Posts
Admittedly, the SS enterprises did not provide any data about the number of the service staff currently employed. However, as shown further in the report, the enterprises provide a huge demand for service staff in the future.

**Skills of employees.** In the opinion of enterprises, their employees have sufficient theoretical and practical knowledge. What they lack most of all is general skills (including foreign language skills, communication skills and computer literacy) and practical skills. A particular emphasis is put on foreign language skills. The group of employees which mostly lack the skills is sports professionals. The answers of the respondents suggest that the scarcity of skills is also characteristic of managers. What they lack the most is general skills.

The interviews held with the respondents helped to identify the lack of skills according to groups of occupation posts. The findings obtained are presented in Table 4.3.

<table>
<thead>
<tr>
<th>Group of Occupation</th>
<th>Shortage of Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managers</td>
<td>1. foreign language skills; 2-3. general skills, knowledge of psychology and pedagogy</td>
</tr>
<tr>
<td>Administration</td>
<td>1. foreign language skills; 2-3. general skills, management skills; 4. computer literacy</td>
</tr>
<tr>
<td>Professionals (instructors, coaches, professional sportspersons, referees, etc.)</td>
<td>1. theoretical knowledge of speciality; 2. general skills and foreign language skills; 3. knowledge of psychology and pedagogy</td>
</tr>
<tr>
<td>Other sports related professionals (managers, doctors, journalists, massagists, etc.)</td>
<td>1. general skills</td>
</tr>
</tbody>
</table>

The answers received by the survey can be supplemented by other insights. The Lithuanian Physical Culture and Sports Strategy for 2005-2015 states that the majority of sports professionals and managers lack the knowledge of strategic planning. This creates a problem of coordination of athlete training and sports competitions. Lithuanian higher education establishments, which train sports professionals, do not provide sufficient knowledge about the planning and organisation of sports events. Sports experts think that young coaches lack the skill of looking for novelties.

**Demand for employees.** According to the interview findings, the biggest shortage is of young coaches and managers. Sports teachers and coaches at school are ageing, which means the likely shortage of such kind of professionals in the future.

**Training of employees.** According to the survey findings, employee training is offered by 66 % of the SS enterprises. Asked to mention the share of costs spent on training in the sports sector, 65 % of the respondents said that they allocated no funds for that in 2006, 8 % of enterprises said they spent as little 1 % of the turnover and 27 % of enterprises allocated from 1 to 10 % of their turnover. 24 % of enterprises said they faced problems related to organisation of training. The most frequently problems mentioned by them were training costs and the supply of appropriate training courses.
**Turnover of Employees.** The turnover of staff in the sports sector is very low, accounting for as little as 10 % per year.

The biggest turnover of employees is in the administration group, making up 15 %. Table 4.4 shows that in 2006, the staff turnover accounting for more than 10 % took place in the groups of other employees (turnover of 14 %) and other sports related professionals (10 %). The employee turnover of 9 % was in the group of professionals. The smallest turnover was among managers.

31 % of the respondents are planning to employ more staff in the upcoming two years. An increase in the number of the employed is likely in all the groups of occupation posts.

<table>
<thead>
<tr>
<th>Groups of occupation posts</th>
<th>Change in SS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managers</td>
<td>6%</td>
</tr>
<tr>
<td>Administration</td>
<td>15%</td>
</tr>
<tr>
<td>Professionals (instructors, coaches, professional athletes, referees, etc.)</td>
<td>9%</td>
</tr>
<tr>
<td>Other sports related professionals (managers, doctors, journalists, massagists, etc.)</td>
<td>10%</td>
</tr>
<tr>
<td>Service staff* (salespersons of sports gear, supervisors and sports equipment, maintenance staff)</td>
<td>0%</td>
</tr>
<tr>
<td>Other employees</td>
<td>14%</td>
</tr>
</tbody>
</table>

* No data were presented by enterprises about the currently employed service staff

4.4. Forecast of Demand for Employees in the Future

The forecast of the future demand for employees in the sports sector has been made by looking at the sector development and the turnover of staff. While examining the change of employees in the sector, the following two reasons were considered:

- a number of employees who leave their occupation posts also leave the labour market (e.g. due to retirement). The presumption was made that the average annual number of such employees is one tenth of the employees aged 55 or above. According to the Population Employment Survey, the economic activity 'Other community, social and personal service activities' (which also includes the sports sector) had 18.1 % of this type of employees in 2006. Therefore, it could be inferred that 1.8 % of employees in each of the occupation groups irreversibly leave the labour market;

- other employees stay in the labour market. Therefore, they have only two options: either get employed in another company and remain in the sector or move to another economic sector. The latter number of employees is estimated on the basis of two presumptions: (1) the share of employees leaving the sector is directly proportionate to the intensity of staff turnover; (2) if workers from a certain group of occupation change their employment on average every year, the probability that they will leave the sector when moving to another job stands at 50 %.
The analysis of the social survey findings suggests that the biggest demand is projected in the groups of service staff and professionals. The forecast of future demand for employees is provided in Table 4.5.

<table>
<thead>
<tr>
<th>Groups of Occupation Posts</th>
<th>Number of Employees in 2006</th>
<th>Development in Five Years’ Time</th>
<th>Annual Change</th>
<th>Leaving the Sector in Five Years’ Time</th>
<th>Demand for New Employees in Five Years Time</th>
<th>Demand for New Employees in One Year*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managers</td>
<td>328</td>
<td>0</td>
<td>6%</td>
<td>32</td>
<td>32</td>
<td>6</td>
</tr>
<tr>
<td>Administration</td>
<td>530</td>
<td>105</td>
<td>15%</td>
<td>74</td>
<td>179</td>
<td>36</td>
</tr>
<tr>
<td>Professionals (instructors, coaches, professional athletes, referees, etc.)</td>
<td>1132</td>
<td>222</td>
<td>9%</td>
<td>120</td>
<td>342</td>
<td>68</td>
</tr>
<tr>
<td>Other sports related professionals (managers, doctors, journalists, massegists, etc.)</td>
<td>132</td>
<td>94</td>
<td>10%</td>
<td>15</td>
<td>109</td>
<td>22</td>
</tr>
<tr>
<td>Service staff* (sports gear salespersons, supervisors and sports equipment, maintenance staff)</td>
<td>0</td>
<td>290</td>
<td>0%</td>
<td>0</td>
<td>290</td>
<td>58</td>
</tr>
<tr>
<td>Other staff</td>
<td>184</td>
<td>153</td>
<td>14%</td>
<td>24</td>
<td>177</td>
<td>35</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>2306</strong></td>
<td></td>
<td></td>
<td><strong>225</strong></td>
<td><strong>225</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Demand for Employees according to the Forecasts of the Lithuanian Labour Exchange**

The Lithuanian Labour Exchange projects the biggest changes in group of service staff where the demand should increase by almost three times. The demand for sports related professionals should go up by 1.8 times and number of sports professionals will decrease by almost one half, yet the demand for them will be higher than the demand for other type of professionals. The growing demand for the labour force in the sports sector will be driven by the increasing demand for maintenance staff, sports gear salespersons, and supervisors of sports equipment. The increasing need will be for sports methodologists and managers. The reason for reduced demand for sports professionals is more opportunities to employ foreign athletes and coaches by concluding direct contracts with them.

The growth in the number of employees is related to the increasing volume of investment into the sports objects of national significance. Moreover, the growing rural tourism also has an impact upon greater demand for sports instructors, sports equipment supervisors and maintenance staff.

**4.5. Summary**

- The sports sector is predominated by ‘independent economic entities’. All enterprises are of the Lithuanian origin.
- The provision of new services lacks intensity. In the recent two years, 40 % of the SS respondents have offered new services. The majority of new services include adult and children training, trade in sports gear and food supplements. A presumption could be made that currently, the sector enterprises experience stagnancy, yet with the number of the exercising population going up, they will be forced to be more active and innovative in offering new services.
• The lion’s share of the respondents (46.5 %) from both sectors said they had few competitors on the local level. As little 15 % of the SS enterprises said they faced strong competition.

• According to the majority of the respondents, turnover increased in 2004 - 2006. The growth is also anticipated in 2007.

• The biggest business impediments in the SS, as mentioned by the respondents, are low standard of living, legal regulations and tax system. A relatively small number of enterprises (making up approximately 17 %) also mentioned the shortage of employees and the lack of competence on the part of staff as an obstacle to a successful business development.

• Modern technologies are used by almost 66 % of the SS enterprises and 49 % of enterprises are planning to use such technologies in the future.

• The findings of the social survey conducted in the sports sector suggest that the biggest number of employees is the group of professionals (49 %).

• The group of employees which mostly lacks skills is sports professionals. They require general and practical skills. A particular emphasis is placed on the lack of foreign language skills. Sports experts think that young coaches lack the skill of looking for novelties, and the majority of sports managers lack the knowledge of strategic planning. These skills would be particularly significant if the sector were subject to rapid developments.

• There is a significant shortage of young coaches and managers. Modern technologies and their application in the sports increase the need for professionals with new type of competence.

• According to the survey findings, employee training is offered by 66 % of the SS enterprises. Few companies faced problems related to the organisation of training. The most frequently problems mentioned by them were training costs and the supply of appropriate training courses.

• The turnover of staff in the sports sector accounts for 10 %. The biggest turnover of employees is in the administration group, making up 15 %. The staff turnover accounting for more than 10 % was characteristic of the groups of other employees and other sports related professionals. The group of professionals was subject to smaller changes in the number of staff. This means that the employees working in the SS enterprises are dedicated to their work and have a lot of experience. Moreover, it means that new employees are not offered many vacancies. 31 % of the respondents are planning to employ more staff in the upcoming two years. An increase in the number of the employed is likely in all the groups of occupation posts, particularly the group of administrative staff and professionals.
5. SUPPLY OF EMPLOYEES

5.1. Introduction
This chapter will provide a short overview of education, groups of occupation posts as well as the trends in the employ supply for the sports sector. The supply of employees is understood as the outcome of education, i.e. the type of qualifications and the number of employees trained. The main data include information about the entrance level, number of graduates, the level of education obtained and the type of qualification acquired. The analysis was performed on the basis of statistical data specially developed for the study, publicly available information about study/training programmes and surveys of vocational schools about the number of graduates employed.

5.2. Education and Job Groups
The best way to describe training achievements is to look at qualification.40 Seeking to obtain a certain qualification, it is essential to have obtained a basic level of education.41 The levels of education in Lithuania are determined by the structure of the system of education. It consists of primary, basic, secondary, post-secondary (the latter is practically no longer applied) and higher education. Pursuant to the Law Vocational Education and Training (new version)42, qualification is based on competences, which include knowledge, skills and values. Qualification and separate competences are laid down in certain documents provided for in the Law on Vocational Education and Training and the Law on Higher Education of the Republic of Lithuania.44 Qualification is the outcome of formal education or other educational attainment. According to their content, training/study programmes are grouped into different areas of education (‘Classification of the Lithuanian Education’). Vocational education and training may be primary and continuing. The purpose of primary vocational education and training is to obtain qualification and the purpose of continuing training is to upgrade the existing qualification or obtain a new one. The study examines one part of the continuous vocational education and training: training of the unemployed.

Presently, primary vocational training and education is carried out pursuant to the following four-stage programmes:

**Stage I.** The training programmes of this stage only admit persons without basic education. The training duration is two to three years if basic education is pursued. After completing the training programmes, the graduates are given a qualification certificate.

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40 Qualification: ability and right to engage in a certain professional activity, as recognised according to a procedure prescribed in law or in legislative acts of the Government or its authorised institution. Republic of Lithuania Law on Education.
41 Education level: competence, knowledge, skills, abilities and values, demonstrating a particular level of personal development, attainment thereof is recognised according to a procedure prescribed by the Government or its authorised institution. Republic of Lithuania Law on Education.
42 A new version of the law was adopted in 2007 and is effective of 1 January 2008.
43 Competence: ability to perform a certain activity on the basis of the entirety of acquired knowledge, skills, abilities and values. Republic of Lithuania Law on Education.
44 Republic of Lithuania Law on Education (new version effective as of 28 June 2003), Article 39, Paragraph 3.
45 Formal education: education implemented according to the programmes approved and registered in accordance with a procedure prescribed by legal acts, the completion of which results in the attainment of a primary, basic, secondary, post-secondary or higher education level and/or a qualification. Republic of Lithuania Law on Education.
Stage II: The training programmes of this stage admit persons with basic education, seeking to acquire vocational qualification. The training duration is two years. After completing the training programmes, the graduates are given a diploma of vocational training and education.

Stage III: The training programmes of this stage admit persons with basic education, seeking to acquire vocational qualification and general secondary education. The training duration is three years. After completing the training programmes, the graduates are given a diploma of vocational education and training.

Stage IV: The training programmes of this stage admit persons with secondary education. The training duration is from one to two years. After completing the training programmes, the graduates are given a diploma of vocational education and training.

University studies of higher education are more oriented towards academic activities, whereas non-university studies focus on applied activities.

With regard to employment activity, the main variable is an occupation post, i.e. the collection of functions for the performance of which remuneration is paid. The performance of such functions requires a certain level of education and a number of relevant skills. In that way, the occupation post may be expressed in terms of education and skills. Occupation posts are usually grouped using the ISCO\textsuperscript{46} or SOC\textsuperscript{47} classifications. Both of them are compatible. The ISCO served as the basis for the Classification of Lithuanian Professions (a profession is linked to the hour of actual work). The latter is used for collecting a variety of statistical data.

The study analyses the supply of employees by comparing the data on education and occupation posts according to the diagram presented below (Fig. 5.1).

Fig. 5.1. Employee supply assessment scheme

<table>
<thead>
<tr>
<th>Education stages</th>
<th>Initial vocational education and training</th>
<th>Higher education (university and non-university)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Plant and machine operators and assemblers</td>
<td>Professionals</td>
</tr>
<tr>
<td>2</td>
<td>Service workers and shop and market sales workers</td>
<td>Technicians and associate professionals</td>
</tr>
<tr>
<td>3</td>
<td>Skilled agricultural and fishery workers</td>
<td>Clerks</td>
</tr>
<tr>
<td>4</td>
<td>Craft and related trades workers</td>
<td></td>
</tr>
</tbody>
</table>
5.3 Supply of Employees by Areas and Level of Education

Analysis of employment changes by the groups of occupation posts shows that in 2004-2006, the biggest reduction was in the group of qualified workers of marketable agriculture and fishery and the biggest growth was in the group of legislators, senior public officials, managers of enterprises and organisations. The share of professionals (including servants) in the employment structure of 2006 constituted less than 30 % and the share of workers made up approximately 60 % (See Table 5.1).

Table 5.1. Structure of Employment by Groups of Occupation Posts

<table>
<thead>
<tr>
<th>Change from 2004 to 2006</th>
<th>Job groups</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>19% ↑</td>
<td>Legislators, senior officials and managers</td>
<td>9%</td>
</tr>
<tr>
<td>7% ↑</td>
<td>Professionals</td>
<td>17%</td>
</tr>
<tr>
<td>5% ↑</td>
<td>Technicians and associate professionals</td>
<td>9%</td>
</tr>
<tr>
<td>4% ↑</td>
<td>Clerks</td>
<td>4%</td>
</tr>
<tr>
<td>13% ↑</td>
<td>Service workers and shop and market sales workers</td>
<td>13%</td>
</tr>
<tr>
<td>-27% ↓</td>
<td>Skilled agricultural and fishery workers</td>
<td>9%</td>
</tr>
<tr>
<td>12% ↑</td>
<td>Craft and related trades workers</td>
<td>19%</td>
</tr>
<tr>
<td>9% ↑</td>
<td>Plant and machine operators and assemblers</td>
<td>10%</td>
</tr>
<tr>
<td>4% ↑</td>
<td>Elementary occupations</td>
<td>11%</td>
</tr>
<tr>
<td>-8% ↓</td>
<td>Armed forces (hired workers)</td>
<td>0%</td>
</tr>
</tbody>
</table>

↑ - increase; ↓ - decrease

In 2006, vocational training schools admitted 19,913 students, which is 3 % less than in 2005. The same year saw a slight increase in the demand for BA studies: 47,240 students entered higher education establishments, i.e. 2 % more than in 2005. Among those who chose vocational education and training, the most popular disciplines were business and administration as well as engineering and engineering professions. Among those who preferred university education, the most popular choice was of Business and administration. In fact, the same trends were prevailing during the previous year. Detailed data about the distribution of admitted students by areas of education are presented in Fig. 5.2.

The distribution of graduates by areas of education coincides with the admission structure, i.e. the predominant number of graduates is from the area of business and administration, and the number of vocational training graduates is more than two times smaller than the volume of graduates from higher educational establishments. Admittedly, in 2006, as compared to 2005, the number of graduates was 11 % smaller. During that period, the number of university graduates increased by 12 %.
5.4. Supply of Employees in the Sports Sector

While implementing a training/study programme, the future employees are usually trained for a certain group of activities, rather than one concrete occupation posts. The activities of different economic sectors often overlap. Certain competences necessary for the SS can be obtained in, for instance, the area of tourism, education, health and fitness activities. As a result, it is quite difficult to name the programmes aimed at training the employees for a particular sector, because graduates of different study programmes may find employment in a variety of economic sectors. Therefore, while looking at the supply of employees, all the programmes were taking into consideration, the graduates from which could be employed in the SS. On the basis of the information provided about study programmes (programmes) in the Open Information, Counselling and Guidance System (AIKOS), they are divided into the following two groups:

- **Group 1.** It comprises the programmes that focus of competences required by the SS. The study presumes that the majority of the graduates from this group of programmes find employment in the sports sector enterprises.
- **Group 2.** The majority of its programmes are aimed at developing competences required by the other sectors. The majority of the graduates should find employment in other sectors and only a small share of them gets employed in the SS. For example, physical therapists and teachers are trained to work in health centres and schools. However, they can also apply their competences in sports enterprises.

5.4.1. Supply of Service Workers in the Sports Sector

A review of the programmes of primary vocational education in the aforementioned manner showed that future employees are directly trained for the sports sector (Group I) under the programme ‘organiser of sports club activity’ (Level 4, *Business and administration*). This training programme is offered in one vocational school.
The training programme of ‘massagists’ (Health education) could be ascribed to Group II. The aim of this programme is to work with people having visual disability.

Table 5.2 provides information about the number of graduates from these vocational training programmes and the level of employment. The latter data were received after making a survey of vocational schools in 2007. The data is of general character because the schools were unable to name the type of economic sectors which employed the graduates.

**Table 5.2. Primary vocational education programmes in sports sector and the number of graduates from them**

<table>
<thead>
<tr>
<th>Primary vocational training programme</th>
<th>Graduates in 2006</th>
<th>Supply of workers in the SS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total</td>
<td>Got employed</td>
</tr>
<tr>
<td>Group I</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organiser of sports club activities</td>
<td>17</td>
<td>10</td>
</tr>
<tr>
<td>Group II</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Massagist</td>
<td>22</td>
<td>19**</td>
</tr>
</tbody>
</table>

* A short description of the programmes listed in the table is provided in Annex 1.
** No data about the number of employed graduates from the massagist vocational education programme was obtained, therefore the average level of employment among the graduates of vocational schools was applied, i.e. 87%.

The registry of study and training programmes contained no information about the labour market training programmes offered to adults. No data about such programmes was available on the list of programmes of informal labour market training.

**5.4.2. Supply of Professionals (in Sports and Sports Related Activities) in the Sports Sector**

There are no non-university study programmes of higher education to train employees for the SS. The university study programmes of stage I, training the specialists for the SS, are listed in Table 5.3. The majority of programmes are targeted towards provision of competences in the other sectors (tourism, fitness and education) and belong to Group 2.

**Table 5.3. Stage 1 Higher Education Study Programmes for Training SS specialists**

<table>
<thead>
<tr>
<th>Study programmes</th>
<th>Graduates of 2006</th>
<th>Supply of Professionals for SS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total</td>
<td>Got employed**</td>
</tr>
<tr>
<td>Group of Occupations of Sports Specialists</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group I</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applied physical activities (university studies)</td>
<td>27</td>
<td>19</td>
</tr>
<tr>
<td>Teaching sports (university studies)</td>
<td>79</td>
<td>55</td>
</tr>
<tr>
<td>Group II</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Physical culture and sports pedagogy (university studies)</td>
<td>69</td>
<td>48</td>
</tr>
<tr>
<td>Physical culture (university studies)</td>
<td>263</td>
<td>184</td>
</tr>
<tr>
<td>Group of Occupations of Other Sports related Specialists</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group I</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourism and sports management (university studies)</td>
<td>62</td>
<td>43</td>
</tr>
<tr>
<td>Sports psychology (university studies)</td>
<td>36</td>
<td>25</td>
</tr>
<tr>
<td>Group II</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Physical therapy (non-university studies)</td>
<td>153</td>
<td>107</td>
</tr>
<tr>
<td>Physical therapy (university studies)</td>
<td>92</td>
<td>68</td>
</tr>
</tbody>
</table>
In 2006, newly offered study programmes included ‘Sports Engineering’ (Group I), ‘Health and Physical Training’, and „Health Educology“ (Group II) but so far generated no graduates.

While assessing the level of supply, only Group I study programmes are taken into consideration. Moreover, since very few higher education schools keep record of a follow-up career of their graduates, the presumption is that the average number of students who get employed is approximately 70 %. Graduates of master studies are not included into the supply because: (1) the majority of master students are employed and (2) prior to getting into master studies students have to complete their stage 1 study programmes and the latter are already included into the supply. With that in mind, the supply of professionals for the SS in 2006 was approximately 140 people.

5.5. Summary

The demand for SS employees is driven by the following key factors:

- sector development;
- company employees operating in the SS are leaving the labour market due to their age or other reasons;
- employees are migrating to other sectors.

As seen from the social survey of the sector enterprises (described in Chapter 4), the turnover of employees in the SS is not significant. The biggest impact on the staff turnover is made by the employees leaving the labour market (due to retirement).

The survey suggests that the demand for employees, occurring as a result of sector development and workers leaving the labour market, should be met by the systems of primary vocational training and higher education. The discrepancy between the employee demand and supply in the SS is shown in Table 5.4. The data were obtained from Tables 4.6, 5.2 and 5.3.

Table 5.4. Demand for Employees and Supply of Primary Vocational Training and Higher Education in the Sports Sector by Groups of Occupation Posts with Vacancies

<table>
<thead>
<tr>
<th>Groups of Occupation Posts</th>
<th>Demand for New Staff during the 1st year *</th>
<th>Annual Supply (2006 data)</th>
<th>Assessment of the Balance between Supply and Demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sports professionals</td>
<td>68</td>
<td>74</td>
<td>Positive</td>
</tr>
<tr>
<td>Other professionals</td>
<td>22</td>
<td>68</td>
<td></td>
</tr>
<tr>
<td>Service workers</td>
<td>58</td>
<td>10</td>
<td>negative</td>
</tr>
</tbody>
</table>

* Newly employed staff to replace those who leave the labour market and compensate the need for employees created by the sector development.
The available data suggest that the demand for employees exceeds the supply for them only with regard to the group of service staff. This is confirmed by the enterprise survey findings and the Lithuanian Labour Exchange predicting major changes in the service staff group, including maintenance staff, salespersons of sports gear and supervisors of sports equipment. The workers for this group should be trained according to vocational education and training programmes, which are presently not offered. This problem was also raised by international experts who said that employers often ask for employees with the level of education lower than higher education. However, the youth prefer BA studies. As a result, certain employees working in the sector have high qualification, yet they lack the proper training for the work to perform.

With regard to sports and sports related professions, the balance between the supply and demand for the latter is positive and therefore there is no actual threat that the shortage of employees in the group of professionals will be increasing in the future. Noteworthy, the majority of studies in the sports sector are based on pedagogical programmes the aim of which is to train physical training teachers. With a view to avoiding the discrepancy between the demand and supply, comprehensive surveys of follow-up careers pursued by the sports sector graduates should be carried out to have the study programmes reviewed and modified as appropriate.

Moreover, if the problem of service staff training were properly addressed and the higher education study programmes were adequately modified, the supply of employees in the sports sector would be sufficient to maintain successful development of the sector. The future of it largely depends on a number of external factors, such as: investment into the sports infrastructure, upgrading of qualifications among the sector employees, maintenance of healthy lifestyle, provision of proper conditions for supporting sports as well as improvement of working conditions in the sector.
6. RECOMMENDATIONS

To improve conformity between demand and supply of employees in the sports sector

As seen from the study, the Lithuanian sports sector is only beginning to take shape as a separate sector and its development should become more intensive in the upcoming years. The future of the sector largely depends on the attitude of state authorities (knowledge, reaction and activity) as well as cooperation of training providers and representatives from employers and employees organization in organization of employees initial and continuing training. For example, a successful development of the SS requires creation and/or renovation of the physical training and sports infrastructure, making it accessible every person in his or her environment and offering proper conditions for professionals to pursue physical training of various age groups and organise the universal movement towards a healthy lifestyle. Furthermore, the following measures should be taken to ensure conformity between the supply and the demand of employees:

- The National qualifications system, which is being developed, will set professional standards for all the economic sectors on the basis of an in-depth analysis of occupational activities. Therefore, it is recommended to initiate and develop a professional standard for the sports sector, elaborately describing the current and future qualifications in the sports sector. This would help develop new qualifications, review the current training/study programmes and organise primary and continuing training and education more successfully.

- Lithuanian higher educational establishments offer about twenty different study programmes which could be ascribed to the sports sector. The majority of them are pedagogical, the aim of which is to train physical training teachers for general education schools. However, there is bigger need for professionals to work in sports clubs and fitness centres. Therefore it is recommended to modify and improve the study programmes to incorporate training of sports instructors.

- Findings of the survey of enterprises and forecasts made by the Lithuanian Labour Exchange suggest that the biggest discrepancy between supply and demand is in the group of service staff. The employees of this group should be trained according to vocational training and education programmes. However, presently, only one school offers a vocational training programme for the sports sector. Therefore, it is recommended to increase the number of primary vocational training programmes for the sports sector and initiate organisation of the relevant labour market training programmes.

- The survey of employers revealed that the SS professionals lack general and special skills, particularly foreign language skills. Therefore it is essential to put more emphasis on foreign language teaching and training of general skills in training/study programmes and offer a wider scope of refresher courses facilitating development of the required skills.

- With a view to ensuring quality of specialist training and developing opportunities for upgrading qualifications, it is recommended to strengthen cooperation between training and educational establishments on the one hand and employer organisations on the other.

- Sports enterprises suffer from the lack of financial stability. Therefore, primary and continuing training programmes should pay more attention at development of entrepreneurship.

- Another relevant issue is the career of highly mastered athletes after they stop doing professional sports. They could be offered an opportunity to acquire a parallel qualification during their career.
It has been determined that small earnings offered to physical education and sports professionals in the public sector, particular in the beginning of their career, make them divert to other activities or get retrained. Therefore, in order to maintain such employees their working conditions should be improved, particularly with regard to their work pay, and the system of employee motivation should be developed (to include insurance, loans, promotion, etc.).
REFERENCES


Germany Tourism (2006) Tourism in Germany – A Summary of 2004 Frankfurt: Germany Tourism


UN WTO World Tourism Barometer, Vol. 4, No. 2 June 2004 [www.world-tourism.org](http://www.world-tourism.org)


### ANNEX 1

**Pagal pirminio profesinio mokymo programas įgyjamų kompetencijų aprašas**

<table>
<thead>
<tr>
<th><strong>Kompetencijos</strong></th>
<th><strong>Sporto klubo veiklos organizatoriaus programa</strong></th>
<th><strong>Masažuotojo programa</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Organizuoti darbą sporto klube;</td>
<td>1. Įvertinti asmens fizinę bei psichikos sveikatos būklę;</td>
</tr>
<tr>
<td>2.</td>
<td>Išmaminti fizinės būklės diagnostiką, tirių ir vertinimą;</td>
<td>2. Sudaryti masažuotojo veiksmų planą</td>
</tr>
<tr>
<td>3.</td>
<td>Naudotis informacinių technologijomis;</td>
<td>3. Vadovautis higienos ir ergonomikos principais;</td>
</tr>
<tr>
<td>4.</td>
<td>Sudaryti kliento aptarnavimo planą;</td>
<td>4. Atlikti masažo procedūrą;</td>
</tr>
<tr>
<td>5.</td>
<td>Ugdyti kliento motyvaciją rūpintis savo sveikata ir grožį;</td>
<td>5. Stebėti/sekti asmens būklę masažo procedūros metu;</td>
</tr>
<tr>
<td>6.</td>
<td>Teikti fizinio tobulinimo paslaugas;</td>
<td>6. Atpažinti gyvybei pavojingas būklės, jas įvertinti ir tinkamai reaguoti;</td>
</tr>
<tr>
<td>7.</td>
<td>Mokytis sveikos gyvensenos ir mitybos;</td>
<td>7. Įvertinti asmens būklę prieš ir po masažo procedūros;</td>
</tr>
<tr>
<td>8.</td>
<td>Konsultuoti klientus kūno kultūros klausimais</td>
<td>8. Užtikrinti teikiamų paslaugų kokybę ir saugumą;</td>
</tr>
<tr>
<td>9.</td>
<td>Bendrauti ir bendradarbiauti su klientais bei jų šeimos nariais.</td>
<td>9. Patarsti fizinės sveikatos tautosojų klausimais;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>10. Tobulinti profesinę kvalifikaciją;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>11. Skleisti profesinę masažuotojo patirtį;</td>
</tr>
</tbody>
</table>

**Profesinė veikla, kuria gali versti pažymėjimo savininkas**

Sporto klubo veiklos organizatoriaus gęba įvertinti kliento bendrą fizinį pasirengimą, žino fizinį krūvių poveikį organizmui, pagrindinius sveikatos atgavimo ir stiprinimo principus, moka parinkti individualią programą, išmano sveikos gyvensenos ir mitybos principus, moka taisyklingai atlikti pratimus su svarnemimis, štangermis ir treniruokliais, moka ugdymo fizinius įgūdžius.  

Darbo organizavimas; asmens fizinės ir psichikos sveikatos būklės tyrimas bei vertinimas; gydymojo, higieninio-kosmetinio, sportinio masažo procedūrų atlikimas fizinio kontaktu būdu rankomis ar specialiais įrankiais arba aparatais, siekiant grąžinti sveikatą, ją palaikyti bei stiprinti organizmą, individualia masažuotojo veikla; darbas sveikatos priežiūros specialistų komandoje.
**ANNEX 2**

**SP specialistų reingimo programos**

<table>
<thead>
<tr>
<th>Programa</th>
<th>Suteikiama kvalifikacija</th>
<th>Kvalifikacijos aprašas</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Neuniversitetinių studijų programos (trukmė 3-3,5 metai)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kineziterapija</td>
<td>Kineziterapeutas; reabilitacijos profesinis bakalauras</td>
<td>Absolventai gali dirbti visose asmens sveikatos priežiūros tygių institucijose, socialinės reabilitacijos ir habilitacijos, auklėjimo, švietimo, globos įstaigose, sporto ir sveikatingumo centruose ir klubuose.</td>
</tr>
<tr>
<td><strong>Universitetinių studijų programos (trukmė: bakalauras - 4-5 metai; magistras – 2 metai)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sveikata ir fizinis aktyvumas</td>
<td>Visomenės sveikatos bakalauras ir magistras</td>
<td>Absolventai gali dirbti visuomeniniuose ir privačiuose sveikatingumo ir laisvalaikio organizavimo bei visuomenės sveikatos ir sveikatos mokymo centruose, asmens sveikatos priežiūros įstaigose, švietimo ir bendrojo lavinimo įstaigose.</td>
</tr>
<tr>
<td>Taikomoji fizinė veikla</td>
<td>Reabilitacijos (ir slaugos) bakalauras ir magistras</td>
<td>Absolventai gali dirbti kūno kultūros mokytojais, metodininkais specializuotose internautuose, neįgaliųjų rekreacijos ir sporto klubuose, reabilitacijos centruose.</td>
</tr>
<tr>
<td>Kineziterapija</td>
<td>Kineziterapeutas; reabilitacijos (ir slaugos) bakalauras ir magistras</td>
<td>Absolventai gali dirbti viso lygio paveikslų sveikatos institucijose, vaikų ugdymo įstaigose, socialinės reabilitacijos ir globos įstaigose.</td>
</tr>
<tr>
<td>Sporto medicina (III studijų pakopos programa)</td>
<td>Sporto medicinos gydytojas</td>
<td>Absolventai gali dirbti sporto medicinos centruose, sporto klubuose, sporto šakų komandose (pagal įgytąją profesinę kvalifikaciją).</td>
</tr>
<tr>
<td>Turizmo ir sporto vadyba</td>
<td>Vadybininkas; vadybos ir verslo administravimo bakalauras ir magistras</td>
<td>Absolventai gali dirbti vadybininkais sporto organizacijose, federacijose, asociacijose, klubuose, turistinių paslaugų firmose.</td>
</tr>
<tr>
<td>Sporto inžinerija</td>
<td>Mechanikos inžinerijos bakalauras</td>
<td>Absolventai gali dirbti sporto klubuose, sportinės, reabilitacijos ir medicininės įrangos bei laisvalaikio inventoriaus gamybos firmose, ergonomikos žinių reikalaujančiose kitos techninės įrangos gamybos firmose, gydymo įstaigose, neįgaliųjų ir sporto organizacijose, mokslo ir studijų institucijose, gali nesunkiai adaptoiti ir kitose inžinerijos srityse</td>
</tr>
<tr>
<td>Sporto psychologija</td>
<td>Mokytojas; psychologijos bakalauras ir sporto magistras</td>
<td>Absolventai gali dirbti sporto organizacijose (sporto šakų federacijose, asociacijose, sporto klubuose, komandose).</td>
</tr>
<tr>
<td>Treniravimo sistemos</td>
<td>Treneris; sporto bakalauras ir magistras</td>
<td>Absolventai gali dirbti treneriais sporto mokyklose bei sporto klubuose.</td>
</tr>
<tr>
<td>Sporto fiziologija</td>
<td>Biologijos magistras</td>
<td>Absolventai gali dirbti pedagogių bei mokslinių – triumfų darbą aukštosiosiose mokyklose, sporto centruose.</td>
</tr>
<tr>
<td>Kūno kultūros ir sporto pedagogika</td>
<td>Mokytojas; edukologijos bakalauras</td>
<td>Absolventai gali dirbti kūno kultūros mokytojais bendrojo lavinimo mokyklose, sporto treneriais centruose.</td>
</tr>
<tr>
<td>Kūno kultūra ir šokis</td>
<td>Mokytojas; sporto bakalauras</td>
<td>Absolventai gali dirbti kūno kultūros mokytojais ikimokykinėse įstaigose, bendrojo lavinimo, technikos, specialiosiose bei aukštosiosiose mokyklose.</td>
</tr>
<tr>
<td>Kūno kultūra</td>
<td>Mokytojas; sporto bakalauras</td>
<td>Absolventai gali dirbti kūno kultūros mokytojais bendrojo lavinimo mokyklose, sporto treneriais centruose.</td>
</tr>
</tbody>
</table>

**Studijų sritis**

- **4 Sveikatos priežiūra**
- **3 Sveikatos priežiūra**
- **4 Socialiniai mokslai**
- **3 Socialiniai mokslai**
- **3 verslas ir administravimas**
- **3 inžinerija ir inžinerinės profesijos**
- **3 Socialiniai mokslai**
- **3 socialiniai mokslai**
- **3 Socialiniai mokslai**
- **3 Socialiniai mokslai**
| Kūno kultūra ir sportas  
(Studijų sritis – socialiniai mokslai arba paslaugos asmenims) | Mokytojas; sporto magistras | Absolventai gali dirbti kūno kultūros mokytojais bendrojo lavinimo mokyklose, gimnazijose, treneriais, instruktoriais sporto centruose. |
| Sveikatos ugdymas  
(Studijų sritis – socialiniai mokslai) | Mokytojas; edukologijos bakalauras | Absolventai gali dirbti kūno kultūros mokytojais ikimokyklinėse įstaigose, bendrojo lavinimo bei aukštesniosiose mokyklose; sveikatos mokytojais mokyklose ir sveikatingumo centruose. |
| Sveikos gyvensenos pedagogika  
(Studijų sritis – socialiniai mokslai) | Mokytojas; edukologijos bakalauras | Absolventai gali dirbti bendrojo lavinimo mokyklos sveikos gyvensenos, civilinės saugos mokytojai; dirbti kitose ugdymo institucijose; vadovauti popamokinės veiklos būriams (priklausomybių prevencijos, nuošimo šeimai, pirmosios medicinos pagalbos, slaugos ir kt.); dirbti sveikatos mokymo centruose. |
| Taikomoji kūno kultūra  
(Studijų sritis – socialiniai mokslai) | Edukologijos magistras | Absolventai gali dirbti taikomosios kūno kultūros specialistais Lietuvos Respublikos sveikatos apsaugos, ugdymo, savivaldos ir kt. institucijose. |
| Kūno kultūros ir sporto edukologija  
(Studijų sritis – socialiniai mokslai) | Edukologijos magistras | Absolventai gali dirbti kūno kultūros ir sporto specialistais mokyklose, sporto klubuose, viešosiose sporto įstaigose ir kitose sporto organizacijose. |
| Visuomenės sveikata  
(Studijų sritis - Sveikatos priežiūra) | Visuomenės sveikatos bakalauras ir magistras | Absolventai gali dirbti valstybinėse, visuomeninėse, privačiose visuomenės sveikatos institucijose bei ugdymo, mokymo institucijose. 
Teikiama ir III pakopos programa |
| Visuomenės sveikatos vadyba  
(Studijų sritis - Sveikatos priežiūra) | Visuomenės sveikatos magistras | Absolventai gali dirbti įvairių lygių sveikatos sistemų valdymo struktūrose, asmens ir visuomenės sveikatos priežiūros bei socialinės globos įstaigose, ligonių kasose, sveikatos draudimo kompanijose, bendrosios praktikos gydytojų grupėse (grupės vadybininkai). |