



RESEARCH REPORT ON LABOUR MARKET AND VET SYSTEMS IN THE OUTDOORS IN EUROPE

English version



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THE EQF OUTDOOR ANIMATORS PROJECT

Research Report

1. A General Overview

1.1 Context

In Europe, the Outdoor leisure sector is recognised as a fast growing industry. Indeed, people nowadays tend to benefit from more and more free time, and the whole year round, holiday-makers from all over Europe are increasingly seeking active type of vacations such as biking, hiking and mountaineering, skiing and snowboarding, sailing and windsurfing and many other outdoor activities. Recently, outdoor sports have been popularized by the media and adopted by popular culture and access to such sports activities is increasingly available to the general public. Therefore, two fundamental trends characterize the European sports sector:

- A marked tendency towards individualisation or personalisation of the activities and the way people engage in them;
- A tendency towards relocating traditional urban sporting practices (ecologisation).

As a consequence, more and more entrepreneurs are not only setting up private companies to provide this growing clientele with the services they desire, but are also seeking for competent qualified outdoor animators who unfortunately are difficult to find on the European labour market and are often trained in a variety of ways that are by no means related. At the same time, more and more young people are entering the outdoor leisure industry, but they face difficulties in finding the right training programs and qualifications to become animators in outdoor activities especially if they wish to practice their trade in more than one country. It can therefore be argued that although the industry continues to flourish, employers and employees have difficulties matching each other requirements because vocational training is practically non-existent or very limited and there is a lack of co-ordination and implementing control at European level, which clearly limits staff mobility and employment potential.

Therefore, looking at the existing literacy a totally comprehension of the sector and a systematic analysis of all the elements characterizing the field are far away from being achieved.

1.2 aims and objectives

The EQF Outdoor Animators project intends to provide a better account of the current state of the outdoors sector in nine European countries: Ireland, Finland, Belgium, Italy, Lithuania, Netherland, United Kingdom, Portugal and France.

Data collected want to give a specific understanding of the global dynamics and trends in the sectors and:

- a) Establish the number and the main features of enterprises active in the sector;

- b) Produce a description concerning the Labour Market corresponding to the Outdoor sector;
- c) Describe the relevant Vocational Educational Training systems in each country, providing an accurate description of the typology of agencies acting at the national level and a short analysis of the relations between the different types of agencies and the qualifications available in the nine countries;
- d) Provide a better visibility of diverse outdoor segments and a qualitative analysis of the main features of the sector.

The whole project is meant to serve, particularly five main stakeholders:

- Consumers;
- Sport services producers;
- Workforces;
- Training providers;
- Policy makers;

1.3 Methodology

The Outdoor Sector has a fundamental problem when looking for Labour market information in that it is not recognised as a sector by National or International statistical collection agencies. This means that there is no formally collected data available and no timeline to extrapolate from. Given the lack of systematic statistics in the field, the EQF Outdoor Animators project has used multiple sources of information based on different methodologies and research techniques.

Using multiple sources of data has given a real advantage in terms of triangulation but offered disadvantage in terms of comparability. In fact, in countries investigated the precise identity of the sector is not strongly established, a specific definition of the field is still missing and a systematic analysis of the sector is far to be achieved.

This adds further difficulties for a reliable data collection and for an homogenous analysis of existing information. Given the mentioned circumstances the present report draws nine different national overview concerning the outdoors sectors in the countries investigated, trying to make generalizations and comparative analysis only where data available might be considerate scientifically homogenous.

Thus, to collect the necessary information three main approaches have been used:

- a) A desk and Internet research carried out centrally;
- b) A multidimensional approach made by mobilising the network of the national correspondents of EOSE who have already a significant experience in the use of similar methodology to investigate the broader sport context;
- c) An analysis of pertinent national data with the mobilization of the above mentioned network of partners who have already a deep understanding of the national system.

Particularly, in the initial phase, a preliminary inventory of existing information has been carried out in order to have a better understanding on the information already available. Subsequently, in the second phase of the research, EQF Outdoor Animators project's research team coordinated the collaboration between the mentioned national correspondents by collecting data through e-mail questionnaires and telephone interviews.

1.4 Main features

Before turning to analyze the field investigated, we must first of all provide a clear definition and description of all the concepts used.

Firstly, we intend the Outdoor sector as an expansive and diverse range of activities that span the spectrum of human activity comprising education, recreation and adult development training with the contest of the outdoors. Particularly, activities provided can be grouped in four main areas:

Education and social intervention: including activities for personal growth, social development and a full range of activities used for educational and social goals such as community development, integration, etc.;

Recreation: referring to experiences aimed at offering leisure time and 'fun' such as summer and holidays camps;

Training: experiences and activities aimed at offering opportunities to learn new skills like leadership, group management, communication;

Tourism: one of the fastest growing segments of the tourism industry; it consists of products/experiences provided by operators who are involved in ecotourism and/or in adventure travel.

Secondly, in terms of economic activities we differentiate between "core outdoor economic activities", group including the organizations/enterprises directly involved in the provision of services to the clients, and "outdoor related economic activities" term encompassing those organizations/enterprises that produce goods and services, make possible the activity of the sector or are indirectly connected to it.

Finally, according to the general EOSE (European Observatory Sport and Employment) nomenclature denominated NEARS (European Classification of Sport and Sport Related Activities) activities in the field may be classified in two main groups: "core outdoor activities" (code 92.61.sp1; 92.62.sp1-3-4) and "related outdoor activities". The nomenclature denominated NEORS (European Classification of Sport and Sport Related Occupations) classifies the occupations in "core outdoor occupations" and "related outdoor occupations". The latter includes professions that support activities, i.e. general and specialized managers, maintenance and cleaning personnel, teaching professional, and sport goods sales people. Instead, the first one includes professions directly involved in the provision of activities and experiences. Although the second group of activity can be quite easily identified, the first one is more heterogeneous and uncertain appearing in a lot of economical sectors such manufacture, trade, tourism, etc. For the purpose of this study, core activities and occupation constitute the main object of interest.

1.5 National Partners

As explained above, the quantitative and qualitative data mentioned within the research report and tables which followed have been given by the national partners listed below involved within the EQFOA project:

Figure 1: Project National Partners

Country	Partner	Full name	Website
UK	SkillsActive (Promoter)	SkillsActive	www.skillsactive.com
FR	SNEPSALPA (Coordinator)	Syndicat National des Entreprises Privées du Secteur des Activités récréatives liées aux Loisirs de Plein Air	www.snepsalpa.org
BE	BFNO	Professional association of outdoor sports businesses	www.bfno.be
IE	ILAM	ILAM (Institute of Leisure & Amenity Management)	www.ilam.ie
FI	VIERUMAKI	Sport Institute of Finland	www.vierumaki.fi
LT	LAPE	Lithuanian Academy of Physical Education	www.lkka.lt
NL	VEBON	Society of Outdoor Enterprises in the Netherlands	www.vebon.nl
PT	PACTA	Portuguese Association of Cultural Animation, Nature and Adventure Tourism Companies	www.pacta.web.pt

2. Enterprises/organisations active in the sector

The outdoor sports industry comprises associations, retailers, manufacturers, distributors, media, and other businesses whose products and services are designed for outdoor activities. The outdoor sector offers diverse range of activities for a heterogeneous clientele. Many operators are active in the field working in more than one segment and serving more than one target group.

Little differences can be identified in the nature and setup of outdoor organizations across the different countries investigated. In Italy, Belgium, Lithuania Finland, Portugal and Netherland the organizations are private in nature. Their typical structure is based on a little number of paid employees (1-9 employees). Conversely, situation in United Kingdom is substantially different: organizations are in most cases non for profit and based on volunteer managers.

Figure1. Total number of enterprises

Country	Total number of enterprises
Belgium	130
Finland	1 300
France	35 000 (incl. 6,500 private sector)
Ireland	693
Italy	5 000
Lithuania	200
Netherland	350
Portugal	390
United Kingdom	2 200

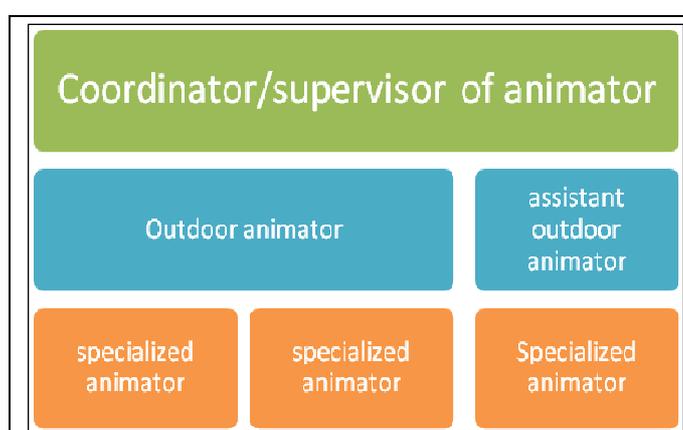
Source – EQFOA 2008

3. Employment situation in the outdoor sector

As identified earlier the Outdoor Sector is a diverse industry which overlaps with other strong sectors such as Tourism and indeed Sport in the Outdoor environment. For the sake and clarity of this project the “core outdoor occupations” includes all those professions directly connected with the provision of services related to the activities of an Animator.

On a qualitative basis, it can be argued that outdoor occupation is characterized by high rate of volunteerism and casual, irregular and part-time staff. It is worth noting that outdoor employment is seasonal in nature with demand increasing especially during the summer months.

Four main job profiles might be identified as necessary for the practice; those are: the outdoor animator; the outdoor assistant animator; the specialized outdoor animator; the coordinator/supervisor of animators.



Particularly, the above mentioned job profiles might be described as follows:

Coordinator/supervisor of animators:

Job description: responsible for coordinating activities among outdoor animators, assistant outdoor animator and specialized outdoor animator;

Main activity: coordination and supervision of activities; planning, administering and approving programmes; validation of competences; monitoring and evaluation; defines operational procedures and individual training programmes for animators

Main duties: safety and rescue responsible; respect for accepted standards and codes of good practice; responsible for animators' activities; responsible for venues and equipment;

Outdoor animator:

Job description: responsible for leading and supervising activities;

Main activities: leading and supervising activities; developing opportunity; safety management; risk assessment /challenge assessment; assistant and specialized outdoor animator assessment; emergency management; check equipment; execution of operational procedures;

Main duties: leadership and control; respect for accepted standards and codes of good practice; responsible for assistant and specialized outdoor animators' activities; rescue management;

Assistant outdoor animator:

Job description: technical assistant with a recognized level of specific expertise generally lower than is required for an outdoor animator;

Main activities: general assistant; venue control; support for outdoor animator's activities;

Main duties: first aid management; respect for accepted standard and codes of good practice; rescue management;

Specialized outdoor animator:

Job description: technical adviser/expert specialized in a specific area (canoeing, walking,..);

Main activity: specific activity management; risk assessment; challenge assessment; check equipment; venue control;

Main duties: safety responsible; respect for accepted standards and codes of good practice; first aid management.

Figure 2. Total number of core employees/workers

Country	Total number
Belgium	800
Finland	2 500
France	54.000
Ireland	1732
Italy	10 000
Lithuania	1 000
Netherland	10 000
Portugal	2 500
United Kingdom	26 200

Source – EQFOA 2008

Having analysed the outdoor occupations on a general basis, we now provide a better account of the characteristics of the system. The outdoor employment is seasonal in nature with demand varying in accordance with the season and the geographical characteristics of the countries.

Finland presents a strong seasonal affection and a regional profile with an increase of the employment in the northern part of the country during the winter seasons. A similar increase can be seen in the southern part during the summer season. Likewise, United Kingdom presents a high seasonal variation in employment with an increase of the 5% during the period between June and August. On a quantitative basis, Netherland and Portugal accounts a high rate of seasonal employment with respectively the 70 % and the 50 % of the total sector.

Volunteers are crucial in the sector with high rate of involvement in the activities; voluntary works embraces management, coaching and training, officiating and general organization. Therefore, many organizations work with casual, irregular or part-time staff.

4. Vocational education and training providers and qualifications

The Vocational Educational Training supplies demand coming from both those wishing to enter the outdoor system and people already present in the system wishing to perfect their skills in term of “continuing education”.

Training in the field of outdoors displays a tendency towards *particularism* with training models and qualification levels varying in accordance with the diverse range of activities provided. Training models available is equally diverse partly because of the range of career paths available and partly because of the range of skills needed in accordance with job profiles.

Therefore we may see the presence of a multiplicity of entities and very loosely structured systems where each players has complete autonomy without any organized coordination. Conversely, some countries (like United Kingdom and Finland) extensively coordinate the activities of those involved in the training and set a specific qualification system. Degrees in the field are available in Recreation Management, Outdoor Education (where are available post graduated qualification, too) and general degrees in Outdoor and Environmental. A big segment is covered by many public and private training organizations that offer short courses in a wide range of topics and provide a high number of qualifications.

Generally speaking, in all the countries investigated, the Minister of Education along with the Minister of Labour and the National Federations tend to have the main responsibility in defining the general framework of the sector. Particularly, public institutions play a crucial role especially for what concerns the definition of the structural framework (laws, decrees, and regulation), the organization of resources allocated and the setting of the administrative technostructure. Therefore they operate as training institutions with the rate of involvement varying from country to country.

Many agencies both private and public are responsible for providing training and qualifications. In Lithuania, Finland and Portugal the Ministers has a crucial role in training and educating people working or willing to work in the Outdoor sector.

According to the International Standard Classification of Education (ISCED), those are public institutions devoted essentially to training. On the contrary, in the Italian context training and qualification is mainly provided by for-profit and private associations. Situation in Finland is extremely heterogeneous with a variety of entities involved in the sector. It is worth noting that, in the majority of the countries, many for-profit associations provide training and qualifications especially for specialized outdoor animators.

Figure3. Vocational education and training providers

Country	Minister of Education	Minister of Labour	Minister of Sport	Region and other local authorities	Associations of employers	Trade Unions	Federations, Olympic Committee	Commercial Training Providers
Belgium	+	0	+	++	0	0	+	0
Finland	++	++	++	+	+	+	+	+
France	+	+	++	0	+	0	++	+
Ireland	++	++	+	0	0	0	++	+
Italy	+	+	0	+	0	0	++	++
Lithuania	++	+	+	0	0	0	+	0
Netherland	+	0	+	0	++	0	+	+
Portugal	++	+	++	0	++	0	++	+
United Kingdom	++	+	+	+	++	0	++	++

Dominant role= ++
 Secondary role= +
 No role= 0

Source – EQFOA 2008

It is worth noting the high fragmentation in terms of qualification delivered: in United Kingdom there are more than 70 different kinds of qualification provided in the sector; 15 in Finland; 9 in Belgium. Finally, it can be noted a high level of heterogeneity within the countries investigated in terms of qualification accreditation.

5. Research limits, outcomes achieved, and new perspectives

As mentioned the sources and methods vary, and the results obtained can be somewhat approximate, but they confirm the growing trend of the sector and the high impact of the outdoor segment in the European sports sector. The EQF Outdoor Animator project has consolidated a better account of the current state of the Outdoor segment, especially for what concerns the ‘core outdoor occupation’ and the ‘core outdoor economic activities’. Therefore, a better understanding of the Labour Market, the Vocational Training systems and the individual job description and profiles for the current job activities of outdoor professionals has been provided.

Limits can be identified in the characterization and, subsequently, the analysis of the sector coming from some difficulties in having a precise definition of the boundaries defining the outdoor sector. Further weakness come from the lack of official data in the majority of the countries investigated and the big spectrum of private and public entities actively involved.

In order to solve some of the mentioned problems and improve the knowledge of the sector, a possible solution comes from disaggregating the Outdoor sector in the four sub-segments proposed (Education and social intervention, Recreation, Training and Tourism) to the aim to allow a relevant and more specific analysis and make easier the data collection.

Therefore, on the basis of the results achieved, we can identify a set of priorities that are relevant to the specific European context and that might be taken into account for further and more specific investigations:

- Improve the knowledge about the amount of money spent on training, the training models adopted in different segments, and the qualification levels for vocational programmes;
- Understand better the policies for employment and the segments of clients in the sector;
- Have better account of the size and the status of the organizations active in the sector;
- Promote a set of European agreed standards to ensure the quality of vocational education and training services and encourage the creation of an “European qualification framework” ;
- Set up the basis of social dialogue amongst providers, relevant governing bodies and other interested parties in an systematic monitoring and analysis of the sector;
- Promote a common methodological approach used by all the European countries in order to be able to compare national segments;

Annex 1: national fact sheets

Belgium:

Geographical and demographic characteristics (Source: Eurostat)

Surface area (Km²): 30 258

Population: 10 355 844

Active population (number and %): 4 379 051 (42.3)

Unemployment: 8.5 %

Sports sector

Regular participation in sport among adults over 16 (at least once a week) (percentage of people)

33 % (Source: Eurobarometer, 2003)

Percentage of population not participating in any sport

45.3 % (Source: APS Survey, 2003)

Number of voluntary sports clubs

30 000 (Source: APS Survey, 2003)

Total number of people whose main occupation is in the sports sector (NACE 92.6)

14 524 –0,33% of active population (Source NIS Beroepsenquête, 1998)

Outdoor sector (Combined database/BFNO)

Total number of enterprises/structures: 130 (60 private; 10 public; 60 non for profit/voluntary)

Size: 1-9 employees

Total number of employees/workers: 800

Mode of employment:

Full time employed: 160

Part time employed: 620

Total number of qualifications delivered : 9 (10 providers)

Finland

Geographical and demographic characteristics
(Source: Eurostat/Tilastokeskus)

Surface area (Km²): 45 227

Population: 5 181 115

Active population (number and %): 2 546 661 (49.2)

Unemployment: 9.1 %

Sports sector

Regular participation in sport among adults over 16 (at least once a week) (percentage of people)

70 % (Source: Eurobarometer, 2003)

Percentage of population not participating in any sport

6 % (Source: National Sport Survey, 2001)

Number of voluntary sports clubs

7 800 (Source: Compass, 2000)

Total number of people whose main occupation is in the sports sector (NACE 92.6)

11 290 – 0.44 % of active population

Outdoor sector (Source: estimation)

Total number of enterprises/structures: 1300

Size: 95 % (1-9 employees); 3 % (10-24 employees); 2 % (25 and more)

Total number of employees/workers: 2 500

Total number of qualifications delivered : 15 (60 providers)

France

Geographical and demographic characteristics (Source: Eurostat)

Surface area (Km²): 550 000

Population: 56 740 000

Active population (number and %): 27 100 000 (43.9)

Unemployment: 9.4 %

Sports sector

Regular participation in sport among adults over 16 (at least once a week) (percentage of people)

32 % (Source: Eurobarometer, 2003)

Percentage of population not participating in any sport

17 % (Source: INSEP and MJS survey, 2000)

Number of voluntary sports clubs

3 000 (Source: Compass, 2000)

Total number of people whose main occupation is in the sports sector (NACE 92.6)

10 421 – 0.63 % of active population (Government statistics department)

Outdoor sector (Source: SNEPSALPA)

Total number of enterprises/structures: 35 000

Size: 30 000 (1-9 employees); 4 500 (10-24 employees); 500 (25 and more)

Total number of employees/workers: 150 000 (54 000, core occupation)

Total number of qualifications delivered : /

Ireland

Geographical and demographic characteristics (Source: Eurostat)

Surface area (Km²): 70 000

Population: 3 924 140

Active population (number and %): 1 641 787 (41.8)

Unemployment: 4.5 %

Sports sector

Regular participation in sport among adults over 16 (at least once a week) (percentage of people)

47 % (Source: Eurobarometer, 2003)

Percentage of population not participating in any sport

36 % (Source: Compass, 2000)

Number of voluntary sports clubs

7 800 (Source: Compass, 2000)

Total number of people whose main occupation is in the sports sector (NACE 92.6)

11 290 – 0.44 % of active population

Outdoor sector (Source: Combined database; Government Agency National Tourism Board)

Total number of enterprises/structures: 693 (Combined database; Government Agency National Tourism Board)

Size:

Total number of employees/workers: 1732 (Combined database; Government Agency National Tourism Board)

Total number of qualifications delivered : /

Italy

Geographical and demographic characteristics (Source: Eurostat)

Surface area (Km²): 301 328

Population: 56 650 000

Active population (number and %): 26 965 400 (49.2)

Unemployment: 8.5 %

Sports sector

Regular participation in sport among adults over 16 (at least once a week) (percentage of people)

31 % (Source: Eurobarometer, 2003)

Percentage of population not participating in any sport

38.4 % (Source: ISTAT, 2000)

Number of voluntary sports clubs

90 000 (Source: Compass, 2000)

Total number of people whose main occupation is in the sports sector (NACE 92.6)

48 802 – 0.18 % of active population (Source: ISTAT, 2003)

Outdoor sector (Source: combined database/diverse employees associations)

Total number of enterprises/structures: 5 000

Size:

Total number of employees/workers: 10 000

Total number of qualifications delivered : /

Lithuania

Geographical and demographic characteristics (Source: Eurostat)

Surface area (Km²): 65 300

Population: 3 462 500

Active population (number and %): 1 517 900 (51.2)

Unemployment: 11.5 %

Sports sector

Regular participation in sport among adults over 16 (at least once a week) (percentage of people)

/

Percentage of population not participating in any sport

/

Number of voluntary sports clubs

1 375 (Source: Statistics Department Lithuania)

Total number of people whose main occupation is in the sports sector (NACE 92.6)

3 851 – 0.25 % of active population

Outdoor sector (Source: combined database)

Total number of enterprises/structures: 2 00

Size:

Total number of employees/workers: 1 000

Total number of qualifications delivered : /

Netherlands

Geographical and demographic characteristics (Source: Eurostat)

Surface area (Km²): 41 526

Population: 16 268 156

Active population (number and %): 7 500 000 (46.2)

Unemployment: 4.7 %

Sports sector

Regular participation in sport among adults over 16 (at least once a week) (percentage of people)

43 % (Source: Eurobarometer, 2003)

Percentage of population not participating in any sport

37 % (Source: Compass, 2000)

Number of voluntary sports clubs

28 900 (Source: Compass, 2000)

Total number of people whose main occupation is in the sports sector (NACE 92.6)

38 700 – 0.52 % of active population (Source: SPC, 2003)

Outdoor sector (Source: combined database)

Total number of enterprises/structures: 350

Size: 250 (1-9 employees); 70 (10-24 employees); 30 (25 and more)

Total number of employees/workers): 10 000

Mode of employment

Full time: 3 000 // **Part- time:** 6 000

Self Employment: 1 000

Seasonal: 7 000

Total number of qualifications delivered : /

Portugal

Geographical and demographic characteristics (Source: Eurostat)

Surface area (Km²): 92 391

Population: 10 800 000

Active population (number and %): 5 349 000 (49.5)

Unemployment: 6.8 %

Sports sector

Regular participation in sport among adults over 16 (at least once a week) (percentage of people)

22 % (Source: Eurobarometer, 2003)

Percentage of population not participating in any sport

77 % (Source: Compass, 2000)

Number of voluntary sports clubs

9 722 (Source: Compass, 2000)

Total number of people whose main occupation is in the sports sector (NACE 92.6)

13 105 – 0.24 % of active population (Source: Censos, 2001)

Outdoor sector (Source: General Department of Tourism)

Total number of enterprises/structures: 500

Size: 90 % (1-9 employees); 10 % (10-24 employees);

Type: 70 % (Private); 10 % (Public); 20 % (non for profit/voluntary)

Total number of employees/workers): 10 000

Mode of employment

Full time: 20 % // **Part- time:** 25 %

Self Employment: 5 % // **Seasonal:** 50 %

Total number of qualifications delivered : 5

United Kingdom

Geographical and demographic characteristics (Source: Eurostat)

Surface area (Km²): 242 514

Population: 59 232 000

Active population (number and %): 28 705 000 (48.5)

Unemployment: 4.7 %

Sports sector

Regular participation in sport among adults over 16 (at least once a week) (percentage of people)

42 % (Source: Eurobarometer, 2003)

Percentage of population not participating in any sport

34 % (Source: Compass, 2000)

Number of voluntary sports clubs

106 400 (Source: General Household Survey ONS, 2000)

Total number of people whose main occupation is in the sports sector (NACE 92.6)

269 872 – 0.94 % of active population (Source: ABI, GB Figures)

Outdoor sector (Source: Skillactive)

Total number of enterprises/structures: 2 220 (Estimation from SkillActive)

Total number of employees/workers): 26 200 (Estimation from SkillActive)

Mode of employment

Full time: 11 600

Part- time: 10 600

Self Employment: 400

Seasonal: /

Total number of qualifications delivered : 70