



Executive Summary

# Study on the Economic Impact of Sport through Sport Satellite Accounts

April 2018

**SpEA**  
SportsEconAustria

**Sheffield  
Hallam  
University** | Sport Industry  
Research  
Centre

*SortsEconAustria*

*Institute of Sports Economics*

*Sheffield Hallam University*

*Sport Industry Research Centre*

## Disclaimer

*"The information and views set out in this study are those of the author(s) and do not necessarily reflect the official opinion of the European Commission. The European Commission does not guarantee the accuracy of the data included in this study. Neither the European Commission nor any person acting on the European Commission's behalf may be held responsible for the use which may be made of the information contained therein."*

***Europe Direct is a service to help you find answers  
to your questions about the European Union.***

**Freephone number (\*):  
00 800 6 7 8 9 10 11**

(\*) The information given is free, as are most calls (though some operators, phone boxes or hotels may charge you).

More information on the European Union is available on the Internet (<http://europa.eu>).

Luxembourg: Publications Office of the European Union, 2018

ISBN: 978-92-79-76926-9

doi: 10.2766/150082

© European Union, 2018

Reproduction is authorised provided the source is acknowledged.

## Executive Summary

Article 165 of the Treaty on the Functioning of the European Union explains that “The Union shall contribute to the promotion of European sporting issues”.<sup>1</sup> As a response, in 2006, the European Commission set up the EU Working Group “Sport and Economics” which developed the Vilnius definition for sport to identify economic activities in goods and services associated with sport. Based on that, national Sport Satellite Accounts (SSAs) were calculated by Austria, Belgium, Cyprus, Poland, and the United Kingdom. They formed the basis for an EU-wide multiregional Input-output tables for sport (MR-IOT:S) which was published in 2012 and based on 2005 data.<sup>2</sup>

The current research, using 2012 data, updates the original study on the basis of four premises: Croatia joining the EU; the long past base year; the economic crisis which may have caused systematic changes in the results; and an update of the Vilnius definition, which too was part of the work undertaken during this project. The availability of fully-fledged national SSAs from Austria, Belgium, Cyprus, Germany, Lithuania, Luxembourg (closely approximated, but still preliminary), the Netherlands, Portugal, Poland, and the United Kingdom provided a much wider firm database compared to the one available for the first model.

It was found that in 2012, sport related Gross Domestic Product (GDP) was 279.7 bn Euro or 2.12% of total GDP within the EU. In addition, 5.67 m employees<sup>3</sup> could be attributed to sport, a share of 2.72%. Stated otherwise, around every 47<sup>th</sup> Euro and every 37<sup>th</sup> employee in the EU are directly sport-related. These numbers indicate that sport is an employment-intensive economic activity, therefore generating a greater sport share in employment than in GDP. In fact, an increase of GDP by 1% goes hand in hand with an additional 1.35% of employment. This is an important insight, as it underlines the substantial role sport plays in countering unemployment. This key-result was already found in the previous study and is further supported by the new data.

---

<sup>1</sup> <http://www.lisbon-treaty.org/wcm/the-lisbon-treaty/treaty-on-the-functioning-of-the-european-union-and-comments/part-3-union-policies-and-internal-actions/title-xii-education-vocational-training-youth-and-sport/453-article-165.html>

<sup>2</sup> See SpEA, SIRC, Statistical Service of Republic of Cyprus, Meerwaarde Sport en Economie, FESI, Ministry of Sport and Tourism of the Republic of Poland (2012)

<sup>3</sup> Throughout the report by 'employees' we mean both employees and self-employed in total.

**Table 1: Main sport-related indicators of the EU-wide model**

Member State	Sport-related GDP in m Euro	Share of sport-related GDP	Sport-related employment in heads	Share of sport-related employment
<b>European Union</b>	279,697	2.12%	5,666,195	2.72%
<b>AT – Austria</b>	13,066	4.12%	226,129	5.63%
<b>BE – Belgium</b>	4,494	1.16%	71,440	1.59%
<b>BG – Bulgaria</b>	338	0.80%	44,756	1.55%
<b>CY – Cyprus</b>	361	1.85%	7,813	2.08%
<b>CZ – Czech Republic</b>	2,055	1.27%	84,803	1.76%
<b>DE – Germany</b>	104,707	3.90%	1,761,369	4.60%
<b>DK – Denmark</b>	3,973	1.56%	64,082	2.45%
<b>EE – Estonia</b>	159	0.88%	13,656	2.31%
<b>EL – Greece</b>	1,784	0.93%	47,486	1.31%
<b>ES – Spain</b>	14,984	1.44%	261,839	1.50%
<b>FI – Finland</b>	3,264	1.63%	50,634	2.09%
<b>FR – France</b>	39,923	1.91%	582,709	2.29%
<b>HR – Croatia</b>	676	1.54%	27,908	1.83%
<b>HU – Hungary</b>	1,252	1.26%	75,771	2.00%
<b>IE – Ireland</b>	1,804	1.03%	30,008	1.68%
<b>IT – Italy</b>	21,217	1.32%	389,120	1.76%
<b>LT – Lithuania</b>	283	0.85%	20,043	1.62%
<b>LU – Luxembourg</b>	630	1.43%	4,336	1.89%
<b>LV – Latvia</b>	142	0.64%	12,611	1.48%
<b>MT – Malta</b>	129	1.81%	3,306	1.98%
<b>NL – The Netherlands</b>	7,973	1.24%	150,687	2.04%
<b>PL – Poland</b>	8,952	2.30%	332,939	2.17%
<b>PT – Portugal</b>	1,879	1.12%	59,330	1.39%
<b>RO – Romania</b>	1,389	1.04%	100,279	1.22%
<b>SE – Sweden</b>	5,949	1.41%	109,191	2.43%
<b>SI – Slovenia</b>	609	1.69%	21,916	2.43%
<b>SK – Slovakia</b>	956	1.31%	47,095	2.03%
<b>UK – United Kingdom</b>	36,750	2.18% <sup>4</sup>	1,064,939	3.75%

Source: Own calculations

The largest sport-related sectors are education (51.2 bn Euros, nearly 1,111,000 employees), sport services<sup>5</sup> (42.1 bn Euros, 749,000 employees), public administration (32.2 bn Euros, 503,000 employees), accommodation and restaurant services (23.2 bn Euros, nearly 586,000 employees), and retail (19.9 bn Euros, nearly 587,000 employees). Just these five sectors add up to 1.29% of the EU's GDP and 1.70% of its employment.

<sup>4</sup> For consistency with the SSA of the United Kingdom, the overall GDP was taken from the national IOT.

<sup>5</sup> This is the only specifically sport-related sector in the System of National Accounts. However, even this sector is aggregated with amusement and recreational activities and thus has to be divided into its sport-related and non-sport parts.

Apart from these two indicators, the importance of an economic sector is enhanced through its connections to other parts of the economy via its supply network. The ratio of total activity (including the supply network) to direct activity is called “multiplier”. The highest multiplier of 2.55 is attributed to the production of sport-related food and beverages. Thus, if one million Euros of sport-related food and beverages are produced in the EU, output worth another 1.55 million Euros has to be generated in order to fulfil the food sector’s need for intermediate goods and services. The second highest is for motor vehicles (2.50), and the third for repair- and installation services (2.32).

A further analysis of multipliers reveals those sectors which send out disproportionately high stimuli to the rest of the economy and can thus be considered key-sectors. On the EU-wide level, construction is the most important sport-related sector since, on average, for each million Euros of demand from other companies, 1.24 million Euros of economic stimuli are distributed within the rest of the EU-economy. This is followed by food and beverages (factor of 1.20), travel agencies (factor of 1.17), agriculture (factor of 1.10), and sporting services (factor of 1.10).

Comparing results for 2005 and 2012 is not perfectly possible. The Vilnius definition has changed, although in only a rather mild way; electric bicycles, as an example, are now part of the definition. The statistical categorisation of goods and services, CPA, has been altered meanwhile too. However, this affects the distribution of economic effects among sectors and leaves the total amount unchanged. The biggest difference between the two studies is that the former one was conducted in terms of GVA, whilst the current one uses GDP. Still, there is a gap between the two reports (1.76% sport-related GVA in 2005 and 2.12% sport-related GDP in 2012) which is too large to be attributed to these different measures. In addition, employment, which uses the same definition in both reports, has increased from 2.12% to 2.72%. Nevertheless, concluding that sport, overall, has become more important in economic terms is not possible, as practically all the increase can be attributed to four EU Member States (MSs): Germany, Poland, Sweden, and France. For all other MSs, values close to those of 2005 were found. Finally, it is worth pointing out that data availability for some MSs is improving. This allows the identification of additional sport-related economic activity – a desirable development, but it also leads to systematically increasing values over time.

Some of the main data sources were tables populated by national experts. They included data on Gross Value Added, production value, employment, private expenditure, public expenditure, gross capital formation, and foreign trade of sport-related goods and services. In addition, UN-comtrade and OECD data was used to identify the origins of imports and the destinations of exports and to fill gaps in the data collector sheets. It was, once again, found that data on sport-related services are much less available than on sport-related goods. Different categorisation schemes proved to be an issue too.

Technical support was given to Belgium's experts and institutions in order to create their national SSA. Personal meetings were held with representatives of the Administration Générale du Sport, the General Statistics Department in the National Bank of Belgium, and Statistics Belgium. The Sport Administration of the Federation Wallonia-Brussels coordinated the project and facilitated intermediation.

## HOW TO OBTAIN EU PUBLICATIONS

### Free publications:

- one copy:  
via EU Bookshop (<http://bookshop.europa.eu>);
- more than one copy or posters/maps:  
from the European Union's representations ([http://ec.europa.eu/represent\\_en.htm](http://ec.europa.eu/represent_en.htm));  
from the delegations in non-EU countries ([http://eeas.europa.eu/delegations/index\\_en.htm](http://eeas.europa.eu/delegations/index_en.htm));  
by contacting the Europe Direct service ([http://europa.eu/eurodirect/index\\_en.htm](http://europa.eu/eurodirect/index_en.htm)) or  
calling 00 800 6 7 8 9 10 11 (freephone number from anywhere in the EU) (\*).

(\* ) The information given is free, as are most calls (though some operators, phone boxes or hotels may charge you).

### Priced publications:

- via EU Bookshop (<http://bookshop.europa.eu>).



Publications Office

ISBN: 978-92-79-76926-9