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# Sports Development Report 2009/2010

Analysis of the situation of sports clubs in  
Germany

Abbreviated Version

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## Sports clubs in Germany

### 1 Summary

The intention of sports clubs in Germany to offer a public welfare orientated sports supply is expressed in their objectives. Amid the variety of club objectives, particular importance is placed upon transmitting values (e.g., fair play, tolerance), offering affordable sports opportunities, and promoting the equal participation of girls/women and boys/men. Furthermore, clubs notably value a sense of community and conviviality and moreover, aspire to make it possible for people with a migrant background to participate in sports. For these reasons, sports clubs can be understood to differ significantly from other sports providers. The self-consciousness of sports clubs to persist with their public welfare orientation has remained remarkably stable from 2005 to 2009.

More and more sports clubs generate sports programmes in collaboration with schools, other sports clubs, kindergarten/day care centres or a commercial sports provider. More than 27% of all sports clubs in Germany already collaborate with schools regarding sports supply. In doing so, nearly 20% of all sports clubs collaborate with a primary school, around 10% with a basic secondary school, about 10% with an advanced secondary school and around 8% with an intermediate secondary school.

An increasing number of sports clubs also offer sports courses to non-members. In addition, sports clubs guarantee organised sports programmes which are affordable to the mass-population. Half of all sports clubs charge a maximum annual membership fee of €25 for children, €30 for adolescents, €56 for adults, and at most €100 for families.

Problems faced by sports clubs most notably relate to the recruitment and retention of volunteers, adolescent elite athletes, coaches/instructors, referees/officials, and members. The need for support further exists with reference to the costs of sports competitions as well as with the number of laws, orders, and directives facing sports clubs. Moreover, problems with the supply of sports facilities have intensified.

From a financial standpoint, one can note that the expenses for coaches/instructors, the execution of own sports events, and non-sports related events have all risen significantly. Expenses which have additionally increased are those

for maintenance personnel, the Gema-fee (radio charges for music that is played publically), and insurances, as well as the general administrative costs and the travel expenses for training and competitions.

## **2 Importance of sports clubs for Germany (knowledge of argumentation)**

The sports clubs in Germany contribute significantly to public welfare. The more than 90,000 clubs represent an imperative foundation for the areas of elite, mass, recreational, and health sports.

### **2.1 The club philosophy**

Conspicuously, sports clubs in Germany are not content with the mere organisation of a simple sports supply. Rather, the orientation of offers by sports clubs is in the interest of public welfare.

Within the wide range of objectives, it is especially important that sports clubs (1) transmit values such as fair play and tolerance, (2) offer an affordable opportunity to practice sports, and (3) promote the equal participation of girls/women and boys/men. Sports clubs also (4) value the sense of companionship and conviviality and want to (5) provide the opportunity for people with a migrant background to practice sports (see Figure 1). Consequently, sports clubs can be understood to significantly differ from other sports providers.

On average, the self-consciousness of the clubs to engage as an actor in the area of youth sports and their self-conception to be a comprehensive sports provider (many programmes for several target groups) is slightly declining. The latter could also be interpreted as the target-group-specific strategy of sports clubs. Additionally, the elite sports orientation as well as the awareness and responsiveness to offers by commercial sports providers are regressive. Interestingly, sports clubs are on average less optimistic about the future than four years ago (see Figures 1 and 2).

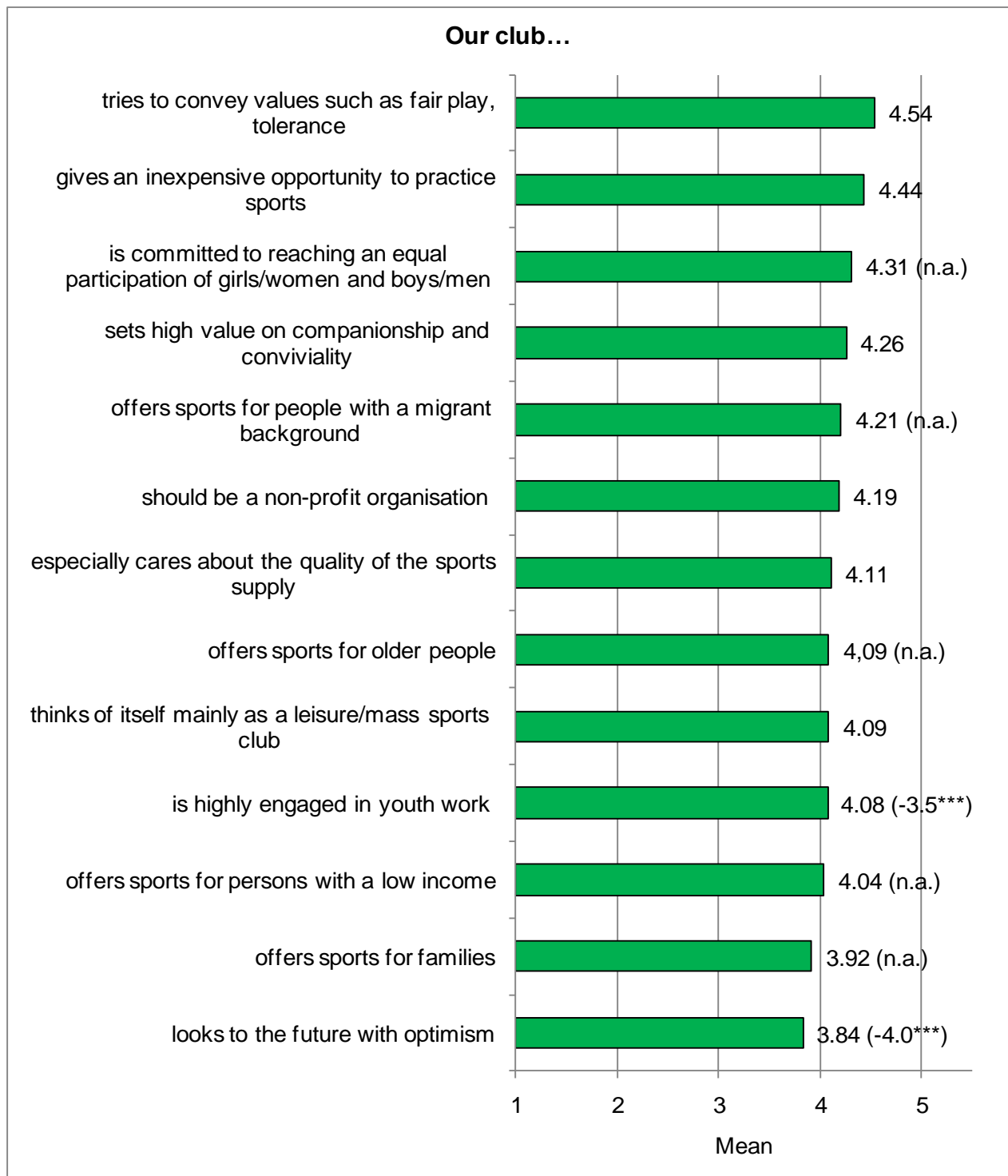
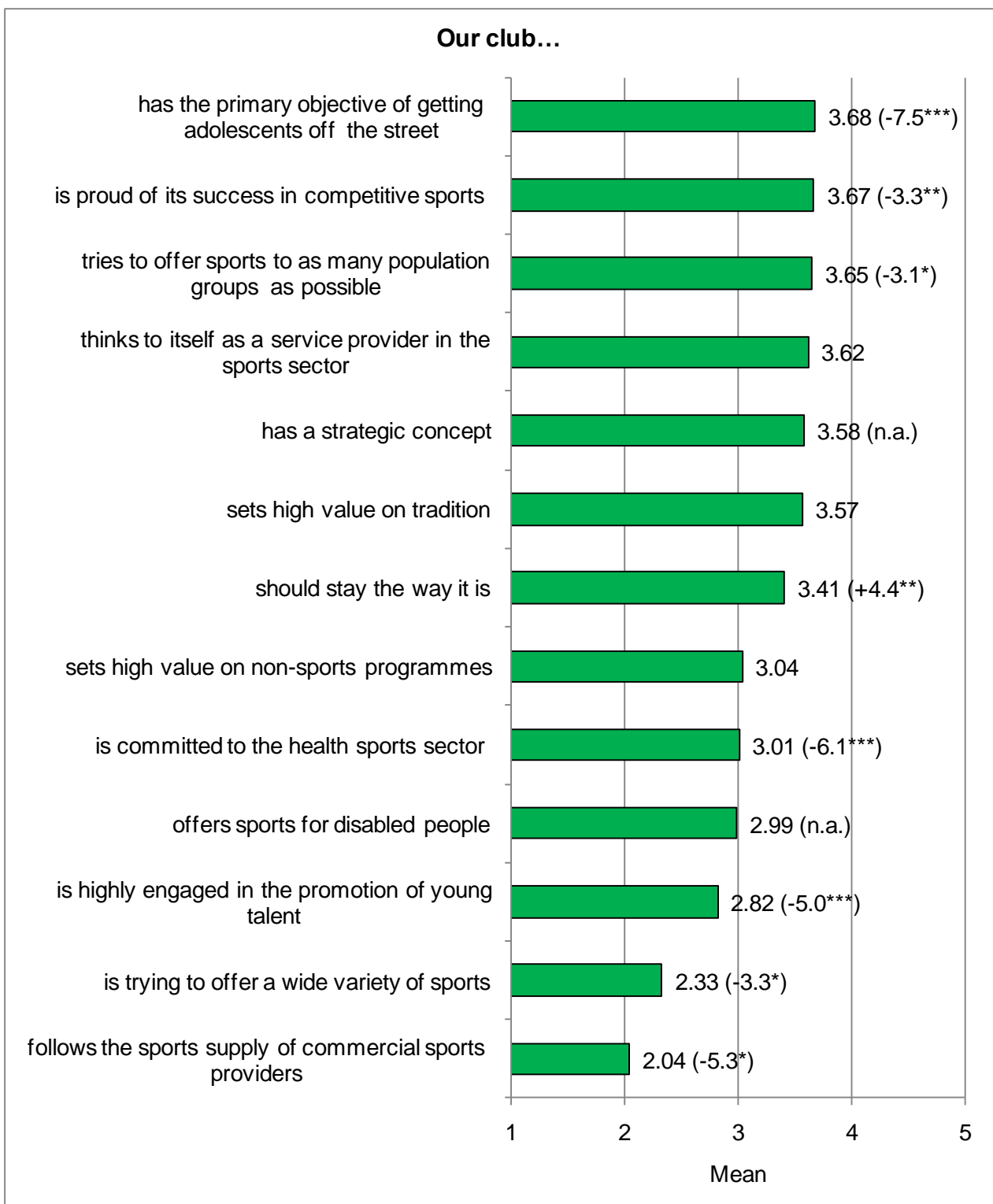


Figure 1: Goals of sports clubs and their development (part 1; 1=totally disagree to 5=completely agree; index<sup>1</sup> in brackets: 2005=0; n.a.=not available in 2005/06).

<sup>1</sup> The calculation of the indexes is explained in chapter 4.4.



*Figure 2: Goals of sports clubs and their development (part 2; 1=totally disagree to 5=completely agree; index in brackets: 2005=0; n.a.=not available in 2005/06).*

## 2.2 Sports club types

In addition to providing their members with a sports programme, sports clubs in Germany can also have various other objectives. These objectives can be summarised into five groups (see Table 1). The categorisation was conducted according to previous sports club surveys which had defined similar sports club types (e.g. Emrich, Pitsch & Papathanassiou, 2001; Heinemann & Schubert, 1994; Nagel, 2006).

*Table 1: Overview of the characterisation of sports clubs based on their club philosophy.*

Sports club type	Our club ...
Integrative sports club	<ul style="list-style-type: none"> <li>– tries to offer sports to as many population groups as possible</li> <li>– gives an inexpensive opportunity to practice sports.</li> <li>– offers sports for older people</li> <li>– offers sports for families</li> <li>– offers sports for disabled people</li> <li>– offers sports for persons with a low income</li> <li>– offers sports for people with a migrant background</li> <li>– is committed to reaching an equal participation of girls/women and boys/men</li> </ul>
Youth oriented sports club	<ul style="list-style-type: none"> <li>– has the primary objective of getting adolescents off the streets</li> <li>– is highly engaged in youth work</li> </ul>
Competitive sports club	<ul style="list-style-type: none"> <li>– is proud of its success in competitive sports</li> <li>– is highly engaged in the promotion of young talent</li> </ul>
Traditional sports club	<ul style="list-style-type: none"> <li>– should stay the way it is</li> <li>– should be a non-profit organisation</li> <li>– sets high value on tradition</li> <li>– sets high value on non-sports programmes</li> <li>– sets high value on companionship and conviviality</li> </ul>
Service oriented sports club	<ul style="list-style-type: none"> <li>– has a strategic concept</li> <li>– is committed to the health sports sector</li> <li>– thinks to itself as a service provider in the sports sector</li> <li>– especially cares about the quality of the sports supply</li> </ul>

For every sports club the respective mean value of the agreement with these different sports club types was calculated. This calculation indicates the extent to which these different sports clubs are existent. At the same time, this assessment



should not be understood in the sense of either-or but rather as to a degree of agreement. As a consequence, clubs can be hybrid and therefore belong to multiple sports club types. Nationwide, most sports clubs consider themselves as integrative or youth oriented sports clubs as opposed to competitive sports clubs. Between 2005 and 2009 the agreement with all different sports club types, except for the traditional sports clubs, has experienced a significant decrease (see Table 2).

*Table 2: Average agreement to the different sports club types and their development (1=do not agree at all, 5=totally agree).*

Sports club type	Mean	Index (2005=0)
Integrative sports club	3.95	-3.4***
Youth oriented sports club	3.88	-5.4***
Traditional sports club	3.68	
Service oriented sports club	3.58	-3.8***
Sports club for competitive sports	3.25	-3.9***

In addition to the mean values of the agreements, the proportion of sports clubs that strongly agrees with these types gives important information about the sports club types. Here, it has to be taken into account that hybrid sports clubs can belong to multiple sports club types. These hybrid orientations should be more likely for bigger sports clubs. This can be explained by an analysis of the strong agreements with one sports club type (criterion  $\geq 4$ ). The highest proportion of over 62% belongs to the youth oriented sports clubs followed by the integration and competitive sports clubs. On the basis of this operationalisation the results are clearer. Compared to 2005, the strong agreement to the youth oriented, integrative, and service oriented sports club has decreased significantly (see Table 3).

*Table 3: Sports clubs with a strong agreement to one sports club type and their development (mean value  $\geq 4.00$ ).*

Sports club type	Proportion of sports clubs (in %)	Index (2005=0)
Youth oriented sports club	62.3	-11.6***
Integrative sports club	53.7	-21.9***
Sports club for competitive sports	38.6	
Traditional sports club	37.1	
Service oriented sports club	35.7	-23.8***

### **2.2.1 Integrative clubs**

The following chapters will elaborate the features of these five sports club types (see Table 3) by the means of structural analysis (see Methodology, Chapter 4.4).

The structural analysis shows that integration sports clubs more frequently offer health sports or sports courses. Furthermore, they have a tendency to have programmes in the area of bowling and shooting sports as well as for disabled people or people with chronic diseases. Equestrian clubs do not consider themselves integration clubs. With regard to the size of the sports club, integration sports clubs tend to have more than 173 members. Furthermore, integration sports clubs stand out due to their tendency to generate sports programmes in collaboration with schools.

### **2.2.2 Youth oriented sports clubs**

Youth oriented sports clubs already distinguish themselves because of their membership structure and their higher proportion of children between 7 and 14 years as well as of youths (15 to 18 years). At the same time the total membership exceeds 96 in most cases. With regard to sports programmes, youth oriented sports clubs have a tendency to shooting sports and football. When generating programmes, youth oriented sports clubs frequently cooperate with schools. Furthermore, youth oriented sports clubs tend to own sports facilities and have a policy for training and educating the clubs' employees.

### **2.2.3 Traditional sports clubs**

Traditional sports clubs stand out due to the high proportion of their members that work as secondary volunteers with special employment contexts (cleaning, organisation of a sports festivals etc.). Furthermore, a high proportion of members takes part in convivial gatherings of these sports clubs. Concerning the membership structure, it can be seen that a lot of the members are more than 60 years old and do not have a migrant background.

### **2.2.4 Service oriented sports clubs**

Service oriented clubs very frequently have programmes in the area of health sports as well as for disabled people. Many of these programmes are also made available to non-members in the form of courses. When generating sports programmes, service oriented sports clubs tend to collaborate with nursery schools or day care centres. Moreover, service oriented sports clubs have a policy for training and educating voluntary and paid staff. Concerning the membership structure, it has to be noted that there is a high proportion of 7 to 14 year olds.

### 2.2.5 Competitive sports clubs

Competitive sports clubs stand out due to the fact that they have a lot of national top-level athletes. With regard to the membership structure, these sports clubs hold a high proportion of adolescent athletes from age 15 to 18 years and a low proportion of members from age 41 to 60 years. Regarding the sports programmes, it becomes apparent that shooting clubs are more likely to think of themselves as competitive sports clubs whereas gymnastic and table tennis clubs do not. Furthermore, competitive sports clubs tend to cooperate with all-day schools and employ coaches with a DOSB (German Olympic Sports Confederation) licence<sup>2</sup>.

## 2.3 Sports supply for the population

The aim of sports clubs to offer an affordable sports supply to the population is mirrored in the clubs' membership and admission fees. As such, sports clubs guarantee organised sports programmes which are affordable to the mass-population. Consequently, half of all sports clubs charge a maximum annual membership fee of €25 for children, €30 for adolescents, €56 for adults and €100 for families (see Table 4).

*Table 4: Annual membership fees in sports clubs.*

Annual fee for	Median <sup>3</sup> (in €)
Children	25.00
Adolescents	30.00
Adults	56.00
Seniors	49.00
Families	100.00
Passive members	35.00
Socially deprived, unemployed	30.00

Taking the demographic developments and the present difficult financial situation in some households into consideration, sports clubs offer special fees for seniors and the socially deprived/unemployed. These fees amount to a maximum of €49 for seniors and, at most, €30 annually for the socially deprived/unemployed in half of all sports clubs (see Table 4).

<sup>2</sup> DOSB licence: Instructor, coach, club manager or youth officer licences of the federal state sports confederations and the national governing bodies in the DOSB.

<sup>3</sup> The median is described as the number separating the higher half of the distribution from the lower half. The median is less prone to outlier values than the mean value ("average").

Most sports clubs charge no additional admission fees for new members. This applies to over 70% of sports clubs regarding children, adolescents, seniors and families and even to around 88% of sports clubs with reference to the socially deprived/unemployed. The proportion of clubs that does not charge an admission fee for children, adolescents, adults, families and passive members has increased significantly since 2007 (see Table 5). Consequently, less and less clubs charge admission fees.

*Table 5: Sports clubs that do not charge an admission fee and their development (n.a.=not available in 2007/08).*

Admission fee for...	Proportion of clubs that do not charge an admission fee (in %)	Index (2007=0)
Children	77.3	+5.1***
Adolescents	74.2	+7.4***
Adults	65.2	+6.7***
Seniors	73.4	n.a.
Families	79.2	+9.7***
Passive members	83.7	+10.4***
Socially deprived/unemployed	87.6	n.a.

In sports clubs where admission fees are charged, half of the sports clubs charge a maximum fee of €10 for children, €13 for adolescents, €22 for adults, €20 for seniors, €30 for families, and €15 for the socially deprived/unemployed (see Table 6).

*Table 6: Admission fees in those sports clubs that charge them.*

Admission fee for	Median (in €)	Mean (in €)
Children	10.00	25.13
Adolescents	13.00	31.63
Adults	22.00	84.95
Seniors	20.00	71.01
Families	30.00	109.20
Passive members	15.00	47.16
Socially deprived/unemployed	15.00	51.99

Moreover, more than half of the sports clubs also offer sports courses to non-members, which is important to the sports supply to the population as a whole. All in all, non-members can use more than one third of the sports programmes offered by sports clubs by means of courses. Conversely, more and more sports clubs offer courses to non-members. Here, the share of sports clubs that offer at

least one course to non-members has increased significantly by close to 59% from 2007 to 2009. Over the same time period, the share of courses for non-members of the total sports supply has risen by a good 9% (see Table 7).

*Table 7: Sports courses for non-members and their development.*

	Germany	Index (2007=0)
Courses on offer (share of clubs in %)	50.5	+58.9***
Courses on offer (clubs total)	45,800	
Share of courses of the total sports supply (mean in %)	36.4	+9.7**

With the absence of sports clubs, elite sports in Germany would be hard to imagine. More than 13,000 sports clubs, 14.6%, have national squad athletes on the D/C-, C-, B- or A- squad levels and consequently form the basis for elite sports in Germany (see Table 8). Here, there are no significant developments between 2007 and 2009.

*Table 8: Sports clubs with national squad athletes.*

	Share of clubs (in %)	Clubs (total)
National squad athletes present	14.6	13,300

## 2.4 Health care

Nearly one third of the sports clubs in Germany offer programmes with the objective of health promotion, prevention, and rehabilitation and therefore contribute significantly to the health care of the population. Overall, on average 11.0% of the sports programmes have such a health care application (see Table 9). That the shares of sports programmes are slightly under those in 2007 (Breuer & Wicker, 2009) could decisively be due to the fact the participation of specific sports clubs (archery clubs, equestrian clubs) has risen considerably in the Sports Development Report 2009/2010.

*Table 9: Sports clubs with sports programmes in the health care section.*

	Share of clubs (in %)	Share of sports programmes (mean in %)
Health promotion and primary prevention	31.3	9.4
Rehabilitation/tertiary prevention	4.5	0.7
Disabilities/chronic diseases	4.7	0.9
Sum of categories related to health care	32.3	11.0

## 2.5 General collaborations

The prominent public welfare character of sports clubs is further indicated by the fact that sports clubs in Germany increasingly collaborate in some form (e.g., information exchange, personal contacts, distribution of flyers) with numerous other institutions. An intense form of this is the collaboration regarding sports supply. Here, 27% of the sports clubs in Germany generate programmes in collaboration with schools, around 20% with another sports club, about 12% with a nursery school/day care centre and over 6% with a health insurance fund. The collaboration regarding sports supply with a school can for instance be understood as the execution of sports programmes within the context of all-day schools. Over the last two years, significantly more sports clubs have collaborated with another sports club, a nursery school/day care centre, a school or a commercial sports provider (see Table 10).

*Table 10: Sports clubs' collaborations regarding sports supply and their development (multiple designations possible; n.a.=not available in 2007/08).*

Collaboration regarding sports supply with	Share of clubs (in %)	Clubs (total)	Index (2007=0)
A school	27.3	24,800	+42.2***
Another sports club	20.9	19,000	+58.8***
Nursery school/day care centre	11.7	10,600	+48.7***
Health insurance	6.6	6,000	
Commercial enterprise	5.7	5,200	
Commercial provider	3.7	3,400	+46.1*
Youth office	3.0	2,700	
Employment bureau	2.3	2,100	n.a.
Institution for senior citizens	2.1	1,900	n.a.
Health office	0.4	400	

## 2.6 Collaboration with schools

In view of the increasing number of all-day schools the collaboration with schools in the creation of sports programmes has gained in importance. When viewing the sports clubs that collaborate with schools with reference to the sports supply (27.3%; see Table 10), almost 20% of all sports clubs collaborate with a primary school, a good 10% with a basic secondary school, about 10% with an advanced secondary school and around 8% with an intermediate secondary school. Close to 7% of all sports clubs work together with an all-day primary school and almost 4% with an all-day comprehensive school (see Table 11).

*Table 11: Collaboration with different types of schools (multiple designations possible).*

Type of school	Collaboration		School is an all-day school	
	Share of clubs (in %)	Clubs (total)	Share of clubs (in %)	Clubs (total)
Primary school	19.8	18,000	6.7	6,100
Basic secondary school	10.3	9,300	3.9	3,500
Intermediate secondary school	8.4	7,600	3.1	2,800
Comprehensive school	5.3	4,800	3.9	3,500
Advanced secondary school	9.7	8,800	3.6	3,300
Vocational school	1.3	1,200	0.2	200

In their collaboration with schools, more than 22% of clubs engage volunteers. A mere 4.5% of the sports clubs use freelancers and only about 3% use full-time employees in their cooperation with schools (see Table 12).

*Table 12: Personnel used in the collaboration with schools (multiple designations possible).*

Personnel used	Share of clubs (in %)	Clubs (total)
Volunteers	22.6	20,500
Freelancers	4.5	4,100
Paid staff	2.7	2,500
Other	1.7	1,500

Of all sports clubs, 13% finance the collaboration with schools from club fees, while 8% of clubs use school fees or external financing (see Table 13).

*Table 13: Financing the collaboration with schools (multiple designations possible).*

Financing of the collaboration	Share of clubs (in %)	Clubs (total)
Through club fees	13.3	12,100
Through school fees	8.0	7,300
Through external financing	8.0	7,300
No particular financing	4.6	4,200

## 2.7 Convivial gatherings

In addition to the actual sports supply, convivial gatherings intensify the public welfare character of sports clubs. The fact that members really attend these gatherings and therefore have an effect on the public welfare potential is demonstrated by the following facts: on average almost every second member participates in convivial gatherings; overall, 13.7m people attended convivial gatherings in the year 2008; at the same time it became evident that in the year 2008 significantly more members participated in convivial gatherings compared to 2006 (see Table 14).

*Table 14: Club members that have participated in a convivial gathering of their club in 2008 and their development.*

	Share of members (mean in %)	Members (total)	Index (2007=0)
Participation in convivial gatherings	49.8	13,700,000	+5.5***

## 2.8 Voluntary commitment and central volunteers

A central feature of the public welfare character of sports clubs is presented by voluntary commitment and central positions. Altogether the members of German sports clubs comprise 1.85m central volunteers, 0.85m of which are at board level and 1.0m at executive level. The executive level of sports clubs comprises several functions under the management of the board which are implemented for the long-term, display negligible complexity, and are of great importance in guaranteeing sports supply and sports competitions. It includes, for example, coaches, instructors, referees and officials. There are about 1.3m men and almost 600,000 women holding these positions (see Table 15). Thus, the organised sports sector represents the most important part of civic involvement in Germany. In the time



period between 2007 and 2009 the number of central volunteers at board level decreased significantly, while increasing significantly at the executive level.

*Table 15: Central volunteers and their development.*

Number of central volunteers	Mean	Total	Index (2007=0)
At board level	9.4	850,000	-11.6***
At executive level	11.0	1,000,000	+8.5*
Male	14.0	1,270,000	
Female	6.4	580,000	
Total	20.4	1,850,000	
Working hours per central volunteer (hours/month)	20.1	37,200,000	

On average, a central volunteer works 20.1 hours per month. Nationwide this adds up to 37.2m working hours served in sports clubs every month in order to attain public welfare purposes. This results in a nationwide monthly added value of €558m and a yearly added value of €6.7bn respectively. It is important to note that in this calculation, the performance of secondary volunteers with special employment contexts (festivals, sporting events, renovations, cleaning etc.) is not considered. All in all, 7m members work sporadically as secondary volunteers in sports clubs. When adding these secondary volunteers to the central volunteers the sum<sup>4</sup> adds to 8.8m volunteers in sports clubs.

## 2.9 Integration of migrants

Against the background of the population's internationalisation, the performance of sports clubs concerning the integration of migrants becomes much more important for the evaluation of their public welfare character. On average over 9% of the members of German sports clubs have a migrant background<sup>5</sup>. In total, this is equivalent to 2.6m people with a migrant background, who are integrated into about 90,000 sports clubs (see Table 16). These figures depict no significant developments between 2007 and 2009. The average proportion of men amongst members with a migrant background lies at around 67.0%, while the proportion of women is about 33.0%.

<sup>4</sup> One must consider that the overall figure can include people twice, those who are central volunteers as well as helping out as secondary volunteers.

<sup>5</sup> The proportion of people with a migrant background in Germany in the year 2008 was at around 19.0% (Federal Statistical Office, 2010b), the proportion of foreigners at 8.8% (Federal Statistical Office, 2010a).

*Table 16: Members with a migrant background.*

	Share of members (mean in %)	Members (total)
Members with a migrant background	9.3	2,600,000

In 30 % of the sports clubs, migrants even perform volunteer work. Around 18% of all sports clubs have volunteers with a migrant background holding voluntary positions at board level and nearly 22% on the executive level. Overall, since 2007 there are significantly more clubs with volunteers with a migrant background in voluntary positions (see Table 17).

*Table 17: Sports clubs with volunteers with a migrant background and their development (n.a.=not available in 2007/08).*

Volunteers with a migrant background	Proportion of clubs (in %)	Clubs (total)	Index (2007=0)
At board level	18.1	16,400	+109.7***
At executive level	21.7	19,700	+114.5***
Male	25.9	23,500	n.a.
Female	15.4	14,000	n.a.
Total	29.3	26,600	+101.2***

On average, one voluntary position in a sports club in Germany is occupied by a person with a migrant background. This implies that overall around 100,000 persons with a migrant background are working as volunteers in sports clubs, which represents a significant increase since 2007 (see Table 18). On average 4.7% of all volunteers have a migrant background. This migrant share amongst volunteers has increased significantly since 2007.

*Table 18: Voluntary positions held by people with a migrant background and their development (n.a.=not available in 2007/08).*

Voluntary positions	Number of migrants (mean)	Migrants (total)	Index (2007=0)
At board level	0.33	30,000	+61.0**
At executive level	0.77	70,000	+77.7***
Male	0.84	76,000	n.a.
Female	0.26	24,000	n.a.
Total	1.10	100,000	+77.4***

## **2.10 Training and education as well as qualifications of employees**

The importance of sports clubs to society is demonstrated by the fact that these clubs intensely engage in training and educating employees in addition to providing the possibility for internships. As such, already 33.4% or 30,300 of sports clubs have a person responsible for the training and education of the volunteers and the paid staff.

By means of structural analysis (see Methodology Chapter 4.4), what distinguishes clubs that have a person responsible for the training and education of its employees from clubs that do not have such a person, is analysed. In this context, especially the club's self-conception as well as the club's objectives is of great importance. Thus, clubs that claim to set high values on the quality of their sport programmes employ such a person. The same applies for sports clubs that have a strategic concept and are engaged in the health care sector. In contrast, these persons are rare in clubs that claim to set a high value on companionship and conviviality and clubs that set high values on being a non-profit organisation.

In addition to the club's philosophy, the sports supply is of great importance. As a consequence of the claimed engagement in the health care sector, clubs with a high number of health care programmes are more likely to employ a person responsible for the training and education of the club's employees. The proportion of these programmes has the same effect. With regard to different sports, it has to be noted that especially clubs with tennis, table tennis, football, and equestrian programmes rarely employ such persons.

Furthermore, the structure of membership is important. Here, it has to be noted that these persons are more likely to be found in bigger sports clubs (critical number of members: over 490). With regard to the gender structure, the proportion of men seems to be the critical factor. In this context, the analysis shows that clubs with an average proportion (between 30 and 53%) tend to employ a person responsible for the training and education of the club's employees. In addition to the gender structure, the age structure is of importance, too. Thus, a proportion of 7 to 14 year olds of at least 21% has a positive effect on the existence of such a person. In contrast, clubs with a proportion of 41 to 60 year olds between 17 and 31% are less likely to have a person responsible for the training and education of employees.

In almost a quarter of sports clubs there is a training and education policy which has also been implemented in most of the clubs (see Table 19). These sports clubs had a planned annual budget in 2008 for such training programmes of €946 on average.

*Table 19: Sports clubs with a training and education policy.*

	Proportion of clubs (in %)	Clubs (total)
Policy present and implemented	18.0	16,300
Policy resented, but (not yet) implemented	6.4	5,800

By means of structural analysis (see Chapter 4.4) the characteristics of clubs with a policy for training and education are analysed. In this context, the results are similar to the analysis of the existence of a person responsible for the training and education of the club's employees. As a consequence the existence of a policy for the training and education of the clubs employees is of great importance for the philosophy of the club. Clubs that claim to set especially high values on the quality of their sports supply, that have a strategic concept and are engaged in the health sector are more likely to have a policy for training and education. In contrast, sports clubs that should be non-profit sports clubs, that set high values on companionship and conviviality, and that offer sports for older people rarely have this kind of policy.

In addition to the club's philosophy, the sports supply is of great importance. Thus, clubs with at least one sports course and commitment to the health sector tend to have a concept of this kind. With regard to sports supply, it has to be noted that tennis and football clubs rarely have such policies, whereas the opposite is the case for swimming and shooting clubs.

Furthermore, the membership structure is important. Clubs with national top-level athletes are more likely to have a training and education policy for their employees. Equally important is the proportion of children and adolescents in the total membership number. In this context, clubs with a proportion of children (7 to 14 years) of at least 21% and a proportion of adolescents (15 to 18 years) of at least 16% are more likely to have a policy of this kind.

A small proportion of clubs already acts as an internship platform for vocational education. Here, around 1,300 sports clubs in Germany show more than two trainees on average (e.g. from the areas sports and fitness; see Table 20).

*Table 20: Vocational education in sports clubs.*

	Vocational internship opportunity
Proportion of clubs (in %)	1.4
Clubs (total)	1,300
Number of trainees (mean)	2.1
Trainees (total)	2,700

The volunteers and paid staff can hold several formal qualifications. Here, more than half of the clubs have a coach with a DOSB licence (see Table 21).

*Table 21: Qualifications<sup>6</sup> of employees in sports clubs.*

	Proportion of clubs (in %)	Clubs (total)
Coaches with a DOSB licence <sup>7</sup>	50.5	45,800
Instructors with a DOSB licence	50.9	46,200
Coaches/instructors without a DOSB licence	60.5	54,900
Club managers with a DOSB licence	8.3	7,500
Youth officers with a DOSB licence	13.3	12,100

On average, sports clubs employ almost 12 people with some kind of formal sports qualification. The majority of them work on a voluntary basis, independent of the qualification (see Table 22).

*Table 22: Volunteers and paid staff according to qualification.*

	Number of people (mean)	Of which volunteers <sup>8</sup> (mean in %)	Of which paid staff <sup>9</sup> (mean in %)
Coaches with a DOSB licence	2.2	83.0	17.0
Instructors with a DOSB licence	4.2	92.4	7.6
Coaches/instructors without a DOSB licence	4.9	93.0	7.0
Club managers with a DOSB licence	0.1	85.0	15.0
Youth officers with a DOSB licence	0.3	93.2	6.8
Total	11.7	89.5	10.5

Across all qualifications, 34.5% of all employees in sports clubs are women. Here, women form the highest proportion of coaches with a DOSB licence (see Table 23).

<sup>6</sup> Only the highest formal qualification of a person is considered.

<sup>7</sup> DOSB licence: Instructor, coach, club manager or youth officer licences of the federal state sports confederations and the national governing bodies in the DOSB.

<sup>8</sup> Persons that receive no remuneration or a maximum remuneration equivalent to € 2,100 per year.

<sup>9</sup> Persons that receive a reimbursement/salary of more than € 2,100 per year.

*Table 23: Proportion of women according to qualification of employees.*

	Share of women (mean in %)
Coach with a DOSB licence	28.2
Exercise leader with a DOSB licence	43.5
Coach/exercise leader without a DOSB licence	34.3
Club manager with a DOSB licence	31.1
Youth officer with a DOSB licence	33.1
Total	34.5

Finally, the allowances and the number of persons per hour of the clubs' employees – distinguished by qualification and job category (paid staff vs. volunteers) are presented in detail. With regard to the volunteers, it can be noted that DOSB-licensed coaches have the highest allowances of more than €7 per hour. They are followed by the instructors with a DOSB licence with an allowance of €6.60 and coaches and instructors without a DOSB licence with allowances of almost €4. Club managers with a DOSB licence receive just under €2 and youth officers with a DOSB licence receive €1.60 per hour. Furthermore, voluntary DOSB-licensed instructors supervise the most persons with an average of just fewer than 15 per hour. Close behind are the coaches and instructors without a DOSB licence with an average of 14 persons as well as youth officers and coaches with a DOSB licence with approximately 13 persons per hour (see Table 24).

*Table 24: Allowances and number of supervised persons per hour by qualification of volunteers.*

Qualification	Allowances per hour (mean in €)	Supervised persons per hour (mean value)
Coaches with a DOSB licence	7.08	12.9
Instructors with a DOSB licence	6.60	14.9
Coaches/instructors without a DOSB licence	3.88	14.1
Club managers with a DOSB licence	1.65	
Youth officers with a DOSB licence	1.60	13.0

Regarding the paid staff, coaches with a DOSB licence have the highest salary of just under €21 per hour; club managers have an average salary of slightly under at €15; whereas instructors and coaches with a DOSB licence earn just over €13.

Youth officers with a DOSB licence have the lowest salary with €10 on average. Concerning the average number of persons supervised by the paid staff, instructors with a DOSB licence supervise 14 persons per hour on average; coaches and instructors without a DOSB licence an average number of 13 persons per hour and coaches with a DOSB licence an average number of 12 persons per hour. However, only 11 persons are supervised by youth officers with a DOSB licence (see Table 25).

*Table 25: Hourly salary and number of supervised persons per hour by qualification of paid staff.*

Qualification	Hourly salary (mean in €)	Supervised persons per hour (mean)
Coaches with a DOSB licence	20.71	11.7
Instructors with a DOSB licence	13.91	14.0
Coaches/instructors without a DOSB licence	13.55	12.8
Club managers with a DOSB licence	14.90	
Youth officers with a DOSB licence	10.00	10.7

## 2.11 Community and sports clubs

Sports clubs in Germany have similar objectives, structures and problems regardless of the general communal conditions. Nevertheless, the situation of sports clubs differs between small communities and towns (up to 20,000 inhabitants), medium-sized towns (over 20,000 and up to 100,000 inhabitants), big towns (over 100,000 and up to 500,000 inhabitants), and metropolises (over 500,000 inhabitants).

### 2.11.1 Small communities and towns (up to 20,000 inhabitants)

The basic strategic direction of sports clubs in small communities and towns (up to 20,000 inhabitants) is still quite traditional. This results in a high agreement with the classical values of club sport, such as the emphasis on companionship and conviviality, the high value set on tradition or also the success in competitive sports. Disproportionately high are also the objectives of being a non-profit organisation, being highly engaged in youth work, as well as offering an inexpensive and diverse sports supply. However, over the course of time between 2005 and 2009, the following objectives have experienced a loss of significance for sports clubs situated in small communities and towns: following the sports supply of commercial sports providers, being engaged in youth work and the

promotion of young talent. At the same time these sports clubs are not as optimistic as they were four years ago.

Compare to clubs from bigger towns, sports clubs in small communities and towns are not likely to have admission fees or top-level athletes. Even cooperation with other sports clubs is less likely in smaller towns. Additionally, small communities and towns tend to have a smaller proportion of persons with a migrant background.

Nonetheless, the strong traditional orientation of sports clubs in small communities and towns does not result in fewer problems. In fact, numerous problems concerning staff are particularly pronounced, i.e. the recruitment and retention of volunteers, adolescent competitive athletes, coaches and instructors as well as referees/officials. Further burdens especially for clubs in small communities and towns are the number of laws, orders, and directives as well as the demographic change.

Since 2007, the situation concerning the following problems has deteriorated: recruitment and retention of members, availability and condition of sports facilities as well as the local competition from non-profit sports clubs and commercial sports providers. Compared with clubs from bigger towns existential problems caused by the recruitment and retention of coaches/instructors and the availability of sports facilities have increased.

### **2.11.2 Medium-sized towns (between 20,000 and 100,000 inhabitants)**

Sports clubs in medium-sized towns (between 20,000 and 100,000 inhabitants) set higher values on the quality of their sports supply and have more programmes for disabled people. In contrast, tradition seems to be less important compared to the sports clubs of other communities. A comparison of the development of the clubs' objectives since 2005 shows that, for sports clubs situated in medium-sized towns, being engaged in youth work does not seem to be as important anymore.

It is furthermore noticeable that sports clubs in medium-sized towns have a strong tendency to cooperate with commercial sports providers as well as the youth office regarding the sports supply. However, there is nothing special concerning the problem situation in these types of sports clubs. With regard to the relationship between the sports club and the community it has to be noted that these sports clubs more frequently are allowed to use public sports facilities without giving any services in return.

Since 2007, the problems of the availability of sports facilities and the local competition from commercial sports providers in particular have increased, whereas the facility problem oftentimes presents an existential problem as well.



### **2.11.3 Big towns (between 100,000 and 500,000 inhabitants)**

Sports clubs in big towns (between 100,000 and 500,000 inhabitants) oftentimes do not think of themselves mainly as leisure/mass sports club. This coincides with the fact that they often do not try to offer sports to as many population groups as possible. At the same time it seems to be of less importance for these sports clubs to give an inexpensive opportunity to practice sports (agreement with this attitude also prevails in this case). Contrarily, sports clubs in big towns have a tendency to operate more strategically (have a strategic concept) compared to sports clubs in smaller communities. In addition, sports clubs in big towns more often have the objective of offering sports for disabled people. Since 2005, the importance of competitive sports has decreased for such sports clubs. Also, they do not look to the future as optimistically as they used to.

Furthermore, it stands out that big towns have the highest proportion of sports clubs that have top national athletes as members. The proportion of persons with a migrant background is considerably higher than in sports clubs of smaller communities at the membership as well as at the volunteer level.

With regard to their problems, it has to be noted that sports clubs in big towns have considerably bigger problems concerning the availability, the condition and the adequacy of the sports facilities compared to sports clubs in smaller communities. All of these problems have increased since 2007. More and more clubs consider the recruitment and retention of coaches/instructors to be an existential problem. Moreover, the financial situation of the clubs is a bigger problem than in smaller communities. This causes clubs in big towns to use public sports facilities on a more regular basis and these have to be paid for more often compared to clubs in smaller communities.

### **2.11.4 Metropolises (over 500,000 inhabitants)**

Sports clubs in metropolises (over 500,000 inhabitants) seem to be less traditional compared to sports clubs in smaller communities. Even though they still accord to most classical values of club sports, it has to be noted that their agreement with values such as companionship and conviviality, cultivating the tradition, the estimation of non-sports programmes, the engagement in youth work or pride in their success in competitive sports is much less pronounced. Moreover, the opinion that sports clubs should be non-profit organisations seems to be of less importance. Meanwhile, most of the clubs have a strategic concept. With regard to sports supply, sports clubs in metropolises tend to offer sports for older people, whereas families are targeted less often. Cooperation with commercial sports providers is more common compared with clubs in smaller communities. Compared to 2005, the agreement that the club should stay as it is more

pronounced. Moreover, sports clubs are more likely to think of themselves as leisure/mass sports clubs.

Sports clubs in metropolises have the highest membership fees. At the same time, these sports clubs are more likely to have an admission fee. However, the proportion of members with a migrant background is over 15%. In almost a quarter of all clubs in metropolises there are persons with a migrant background at board level compared to 27% on the executive level (instructors, referees). This means that sports clubs in metropolises integrate to a higher extent those persons with a migrant background. However, this can be traced back to the fact that, in general, there is a much higher proportion of persons with a migrant background in metropolises.

Sports clubs in metropolises have a specific problem constellation. Surprisingly, problems concerning the staff, such as the recruitment and retention of volunteers, adolescent competitive athletes, coaches/instructors and referees/officials are less important. Furthermore, problems concerning the demographic change are less serious. In contrast, problems concerning the facilities (availability, condition, and adequacy) are considerably more pronounced which can also be said about the problems concerning the competition (other sports clubs or commercial sports providers). Problems concerning the competition have experienced a significant increase since 2007, as have the existential problems caused by the recruitment/retention of members as well as the lack of sport facilities.

Sports clubs in metropolises tend to over-proportionately use public sports facilities that have to be paid for. The severity of the situation concerning sports facilities is shown by the fact that considerably more sports clubs see their existence threatened by the lack of sports facilities as compared to the recruitment/retention of volunteers. Further existential problems in metropolises are financial problems and problems concerning the recruitment/retention of members.

### **3 Possibilities and need for support (knowledge of action)**

#### **3.1 General problems**

Despite all the remarkable performances of sports clubs, one cannot overlook that the situation of sports clubs is not problem free. Problems are evident with reference to the recruitment and retention of (1) volunteers, (2) adolescent elite athletes, (3) coaches/instructors, (4) referees/officials, and (5) members. The need for support further exists in light of the (6) the costs of sports competitions and (7) the number of laws, orders, and directives facing sports clubs, which are often categorised as too high and problematic (see Figure 3).

In the last two years, the perceived severity of the problem relating to the recruitment and retention of volunteers has decreased. Over the same time period, however, several problems have increased, such as the recruitment and retention of members, the number of laws, orders, and directives, the costs of sports competitions and the demographic change in the regions (see Figure 3). Problems related to the supply of sports facilities have also intensified.

The on average moderate severity of problems should not detract from the fact that there is a not to be underestimated number of clubs that have at least one existential problem, i.e. nationwide 32.1% of all sports clubs or alternatively a total of around 29,000 of the 90,767 clubs in Germany. This proportion of clubs has significantly increased between 2007 and 2009. This is largely down to the fact that particular existential problems have intensified. Here, the recruitment and retention of volunteers is an existential problem for almost 9%. Furthermore, almost 6% of the clubs feel threatened by the number of laws, orders and directives. For over 5% of the clubs the recruitment and retention of members and of coaches as well as the financial situation of the sports clubs present existential problems. Those existential problems attributable to the costs of sports competitions, the number of laws, orders and directives as well as the local competition through commercial sports providers, have increased between 2007 and 2009 (see Figure 4).

Overall, one must note the diverse relationships and mutual reinforcements of the displayed problems. As an example, the consequences resulting from the developments of all-day schools can impact upon the recruitment and retention of members.

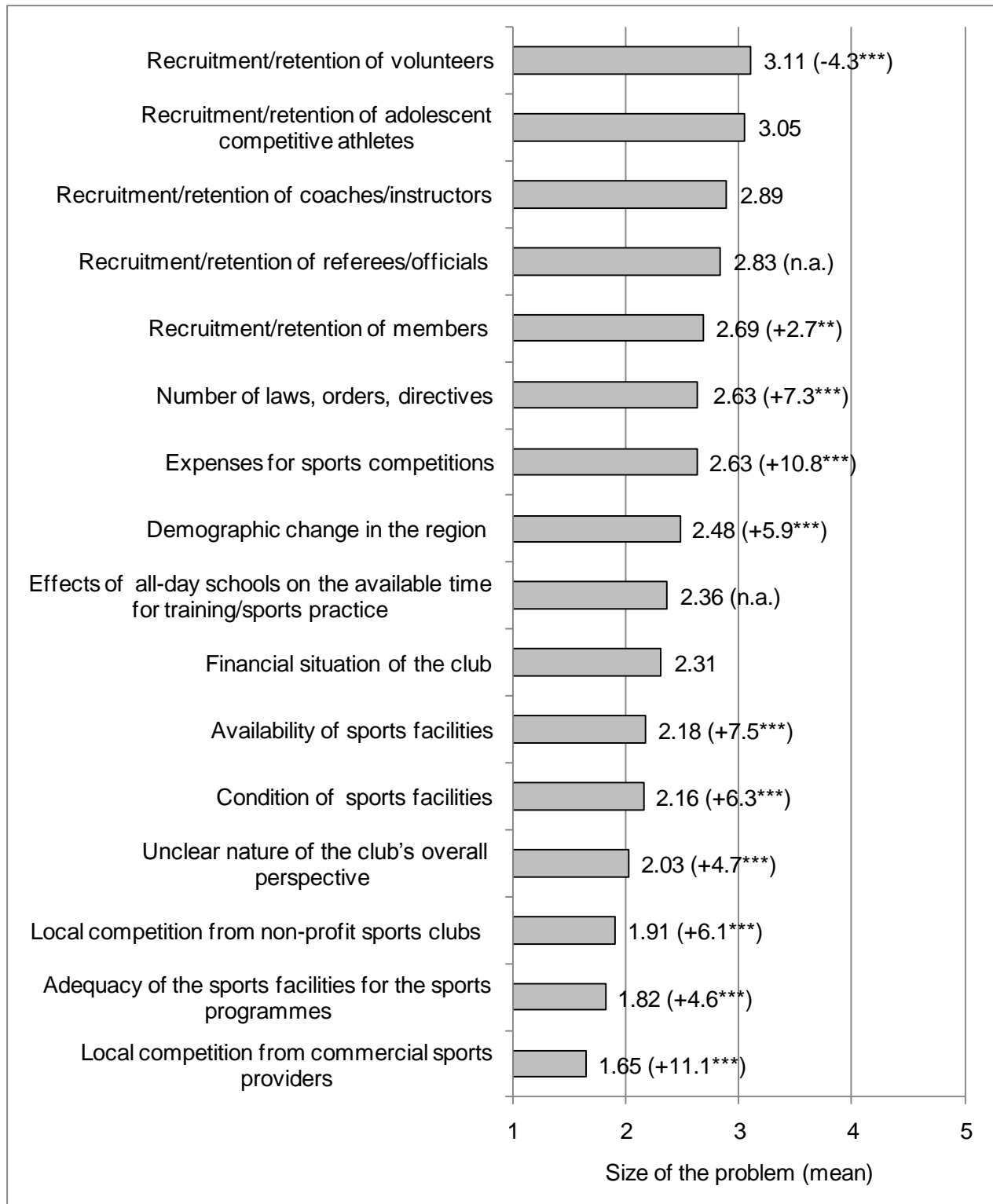


Figure 3: Problems of the sports clubs sorted by the size of the problem and their development (1=no problem, 5=a very big problem; index in brackets: 2007=0; n.a.=not available in 2007/08).

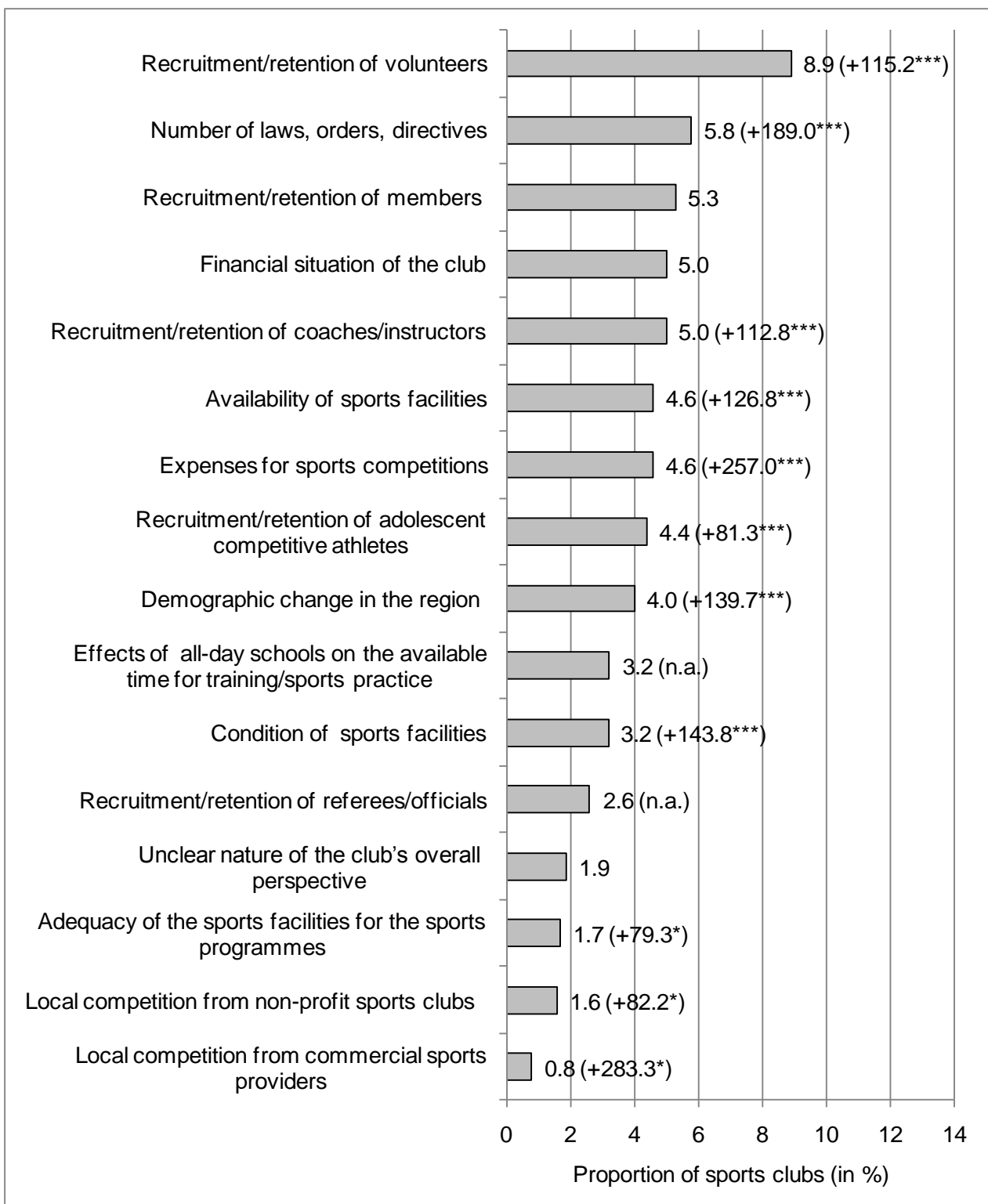


Figure 4: Proportion of sports clubs with existential problems and their development (in %; index in brackets: 2007=0; n.a.=not available in 2007/08).

### **3.2 Need for support of the different sports club types**

This chapter will examine whether there are any differences between the five different sports club types concerning their need for support. The results of the analysis are summarised in Table 26. In this table a negative value signifies that the need for support decreases with the increasing agreement to a sports club type. In contrast, a positive value signifies that the need for support in a certain area increases significantly the more the sports club is in accordance with one particular sports club type.

The analysis shows considerable differences with regard to the need for support of the different sports club types. On the whole, traditional sports clubs have the lowest need for support. Service oriented and integrative sports clubs have increasingly pressing problems in only a few areas, whereas competitive sports clubs and especially youth oriented sports clubs have serious problems in a lot of areas (see Table 26).

Integrative sports clubs only have problems in the areas of recruitment and retention of adolescent competitive athletes, coaches and instructors. In contrast, integrative sports clubs perceive the problems in many areas as significantly smaller. This is especially the case for the recruitment and retention of referees/officials, the financial situation of the sports club, expenses for sports competitions, availability and condition of the sports facilities, the unclear nature of the club's overall perspective, and the time effects of all-day schools and eight-year secondary schools.

Youth oriented clubs need more support in almost all categories when compared to integrative sports clubs. Only the problems concerning the recruitment/retention of members and adolescent competitive athletes are smaller in these sports clubs. Problems concerning the local competition from commercial sports providers did not show a significant effect.

Competitive sports clubs also have bigger problems in multiple areas. These are especially the problems concerning the recruitment/retention of members, adolescent competitive athletes, referees and officials as well as problems concerning the financial situation of the club and expenses for sports competitions. Further serious problems for such a type are the number of laws, orders, and directives as well as the time effects of all-day schools and eight-year secondary schools. In contrast, significantly smaller problems are the ones concerning the recruitment/retention of volunteers and coaches/instructors as well as the problems concerning sports facilities and the local competition from commercial sports providers.

On the whole, traditional sports clubs have the lowest need for support. Apart from the recruitment/retention of adolescent competitive athletes and the demographic change the same effect can be ascribed to all of the problems: the more a sports club identifies itself as a traditional sports club, the lower its need for support. This finding might come as a surprise as modernisation is often recommended to sports clubs. With regard to management studies, modernisation, indeed, results in new chances for development as well as increasing latitude. However, modernisation at the same time leads to numerous new challenges.

Service oriented sports clubs have increased problems in only a few areas. These are problems concerning the availability of sports facilities, the local competition from commercial sports providers as well as the time effects of all-day schools and eight-year secondary schools on training operations.

*Table 26: Need for support in dependence of the sports club types (from +++=very strong to ---=very weak; n.s.=not significant).*

Problem	Integrative sports club	Youth oriented club	Competitive sports club	Traditional sports club	Service oriented sports club
Recruitment/retention of members	n.s.	---	+++	--	---
Recruitment/retention of adolescent competitive athletes	+++	--	+++	n.s.	---
Recruitment/retention of volunteers	n.s.	+++	-	---	---
Recruitment/retention of instructors and coaches	+	+++	-	---	---
Recruitment/retention of officials and referees	-	+++	+++	---	---
Financial situation of the club	---	+++	+++	---	---
Expenses for sports competitions	---	+++	+++	---	--
Availability of sports facilities	--	+++	-	---	+++
Condition of the sports facilities	--	+++	---	---	n.s.
Adequacy of the sports	n.s.	+++	---	---	n.s.

Problem	Integrative sports club	Youth oriented club	Competitive sports club	Traditional sports club	Service oriented sports club
facilities for the sports programmes					
Local competition from non-profit sports clubs	n.s.	+++	n.s.	---	---
Local competition from commercial sports providers	n.s.	n.s.	-	---	+++
Number of laws, orders and directives	n.s.	+++	+	-	--
Unclear nature of the club's overall perspective	---	++	n.s.	---	---
Demographic change in the region	n.s.	+++	n.s.	n.s.	---
Time effects of all-day schools and 8-year secondary schools on the available time for training/sports practice	-	+++	+++	---	+++

Especially youth oriented sports clubs have bigger problems in many areas, whereas most other sports club types have smaller problems. With regard to hybrid club orientations, it has to be noted that a combination of club types results in smaller problems in many categories (see Figures 5 and 6).

Thus, the average size of the problem recruitment/retention of volunteers in clubs without special orientation (i.e. average agreement with all sports club types <4) is at 3.25. Integrative sports clubs have a problem value of 3.19 (=3.25-0.06), service oriented sports clubs are at 3.01 (=3.25-0.24) and youth oriented sports clubs are at 3.52 (=3.25+0.27). A hybrid orientation of the sports club in the sense of being an integrative and a traditional club (at the same time) results in a reduction of the problem through the combination of factors and is at 2.80 (=3.25-0.06-0.39; see Figure 5).



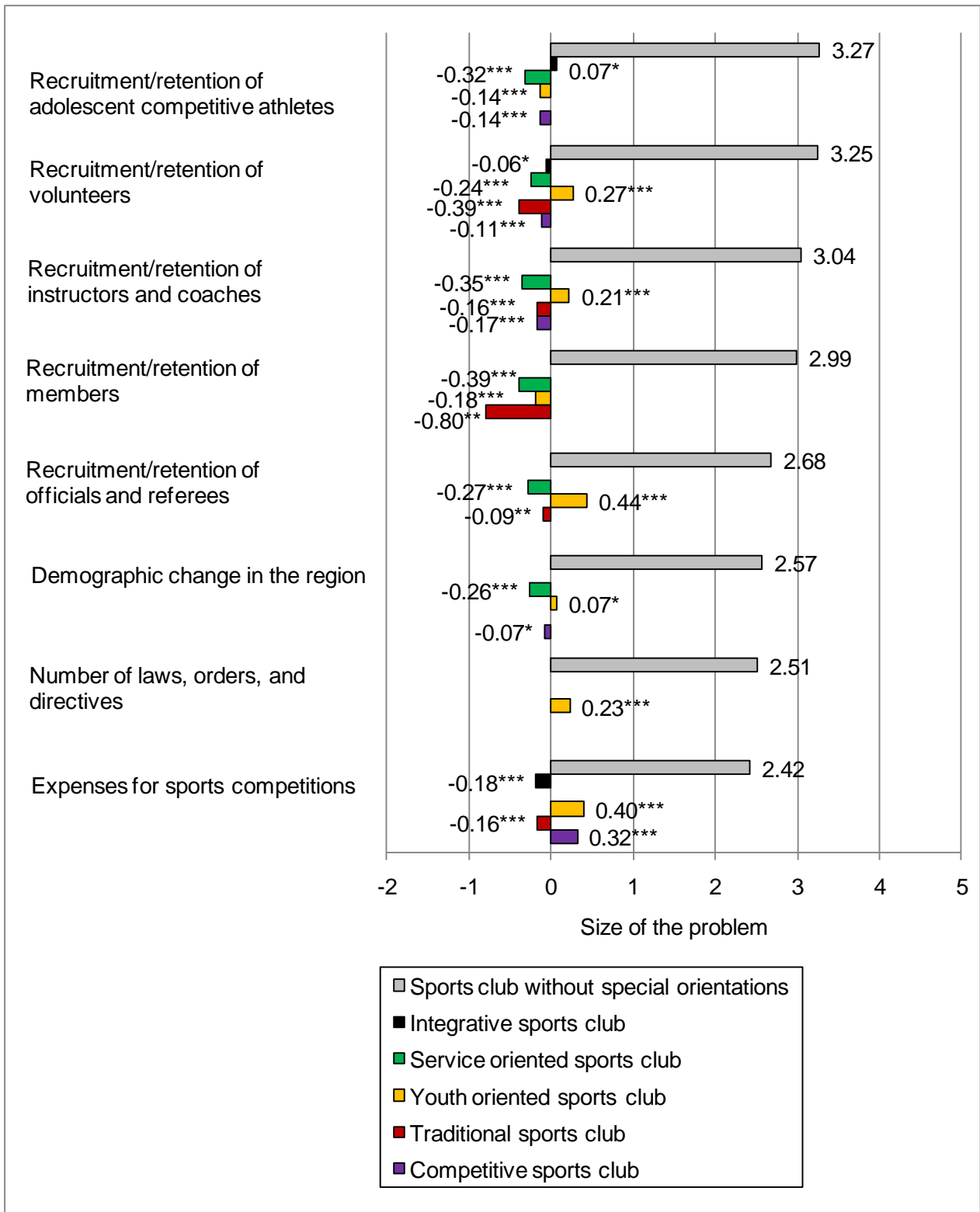


Figure 5: Size of the problems dependent on the strong agreement with sports club types (part 1).

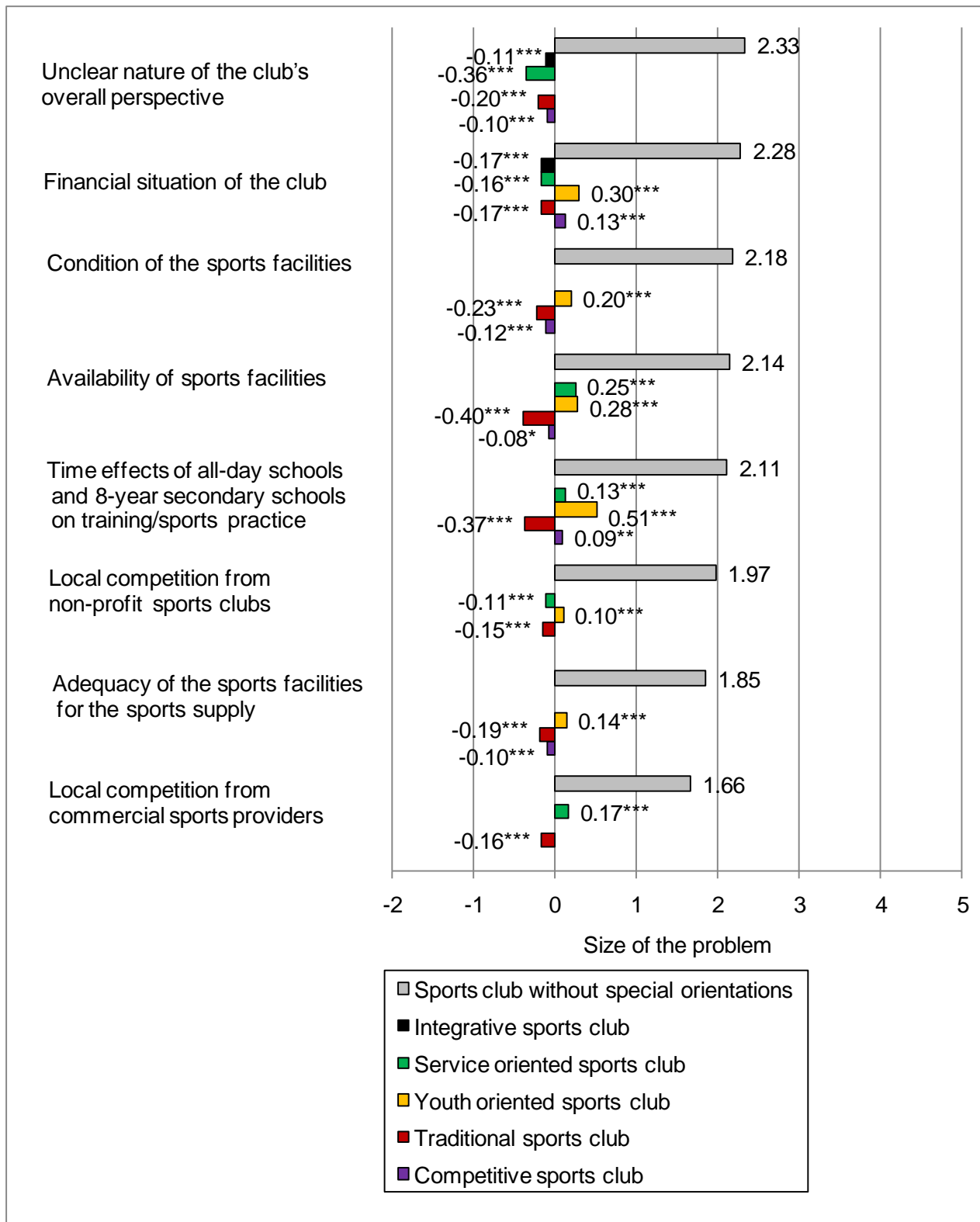


Figure 6: Size of the problems depending on the strong agreement with sports club types (part 2; G8=eight year secondary school)

The question is now to what extent the problems of the respective club types have changed over the course of time, i.e. whether certain problems have increased or decreased dependent on the sports club type. It was found that all five sports club types show similar developments, whereas some problems can be ascribed to certain sports club types. The problems of recruitment/retention of members, adolescent competitive athletes, and volunteers as well as the financial situation of the sports club, the expenses for sports competitions and the laws, orders, and directives show no significant development between 2005 and 2009. Problems concerning the availability of sports facilities, the local competition from other sports clubs and the demographic change have increased significantly (see Table 27).

In contrast, certain problems have increased only for certain sports club types. For integrative sports clubs these are problems concerning the condition and adequacy of the sports facilities and the unclear nature of the club's overall perspective. These developments are the same for youth oriented sports clubs, while these clubs have additional problems concerning the local competition from commercial sports providers. For competitive sports clubs, fewer problems have deteriorated when compared to other sports club types. In addition to the aforementioned areas, traditional sports clubs have had increasing problems concerning the adequacy of the sports facilities for the sports supply as well as the local competition from commercial sports providers over the course of time. For service oriented sports clubs, problems regarding the condition of the sports facilities and the local competition from commercial sports providers have increased significantly (see Table 27).

*Table 27: Development of problems by sports club type from 2005 till 2009 (criterion: strong agreement; in the cells: indexes on the basis 2005=0).*

Problem	Integrative sports club	Youth oriented sports club	Competitive sports club	Traditional sports club	Service oriented sports club
Recruitment/retention of members	n.s.	n.s.	n.s.	n.s.	n.s.
Recruitment/retention of adolescent competitive athletes	n.s.	n.s.	n.s.	n.s.	n.s.
Recruitment/retention of volunteers	n.s.	n.s.	n.s.	n.s.	n.s.
Financial situation of the club	n.s.	n.s.	n.s.	n.s.	n.s.
Expenses for sports competitions	n.s.	n.s.	n.s.	n.s.	n.s.
Availability of sports facilities	+7.9**	+12.2***	+9.5**	+11.6**	+12.0***
Condition of the sports facilities	+6.2*	+8.6**	n.s.	n.s.	+4.4*
Adequacy of the sports facilities for the sports supply	+9.2**	+9.8**	n.s.	+5.7*	n.s.
Local competition from non-profit sports clubs	+7.1*	+10.3**	+8.6*	+10.0*	+11.6*
Local competition from commercial sports providers	n.s.	+8.2*	n.s.	+11.7*	+12.0**
Number of laws, orders, and directives	n.s.	n.s.	n.s.	n.s.	n.s.
Unclear nature of the club's overall perspective	+8.4*	+7.2*	n.s.	n.s.	n.s.
Demographic change in the region	+11.0***	+13.0***	+15.4***	+13.5**	+10.5***

### 3.3 Effect of education investment on the need for support of sports clubs

This chapter tries to clarify whether clubs with education investment have bigger or smaller problems compared to clubs without such (noteworthy) investment (for the calculation see Chapter 4.4)<sup>10</sup>. Knowledge of action is presented by demonstrating the extent to which investment in the training and education of employees can be profitable. There are three indicators for the existence of education investment in sports clubs: (1) the existence of a policy for the training and education of employees, (2) covering the costs of training and education of employees, and (3) a proportion of the total budget of at least 2% for training and education in 2008. This examination has been carried out in order to analyse the development of the clubs' problems depending on the existence of the presented indicators for education investment (see Figure 7).

At first, it is evident that the biggest problem for sports clubs without education investment is the recruitment/retention of volunteers. Regarding this problem, it becomes apparent that the induction of a policy for the training and education of employees as well as increased education expenses lead to a considerable reduction in the problem.

Here, and for the further course of this problem analysis, it has to be pointed out that a combination of education investments leads to an even stronger reduction of the problem which suggests that combining different measures could be of interest to sports clubs.

Moreover, Figure 7 shows that for sports clubs without education investment the second biggest problem is the recruitment/retention of adolescent competitive athletes. This problem can be reduced by inducing a policy for training and education of the employees and by the sports club covering the costs of the education. However, the effect of the induction of a policy is bigger compared to the covering of the costs.

In third place for clubs without education investment, is the problem of recruitment/retention of instructors and coaches. In order to reduce this problem, an education and training policy should be inducted and the proportion of the education related expenses of the total budget should be increased. However, the effect is bigger for the induction of the policy.

Another important problem for sports clubs without education investment is the recruitment/retention of referees and officials. A reduction of this problem can be

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<sup>10</sup> It has to be noted that the reasons for the clubs' problems are very complex. This analysis regarding education investment can only demonstrate tendencies.

achieved through the induction of a policy or through increased education expenses.

Furthermore, the recruitment and retention of members is a problem for sports clubs without education investment. Here, the induction of a policy as well as covering the education costs leads to a reduction of the problem, whereas the bigger effect can be achieved through the induction of the policy in this case.

With regard to the problems concerning the demographic change in the region, the problem can be reduced by inducing a policy for an education and training system for the clubs' employees.

The financial situation of the clubs without education investment can be improved through investments in all three areas (induction of a policy for training and education, sports club covering education costs, increased education expenses). The strongest reduction in the problem can be achieved through covering the education costs.

Finally, the problem regarding the unclear nature of the club's overall perspective is of importance in this context. Improving the overall perspective of the club can be achieved by the induction of a training and education policy as well as by the sports club covering the education costs. However, the induction of a policy for training and education seems to result in a bigger reduction of the problem (see Figure 7).

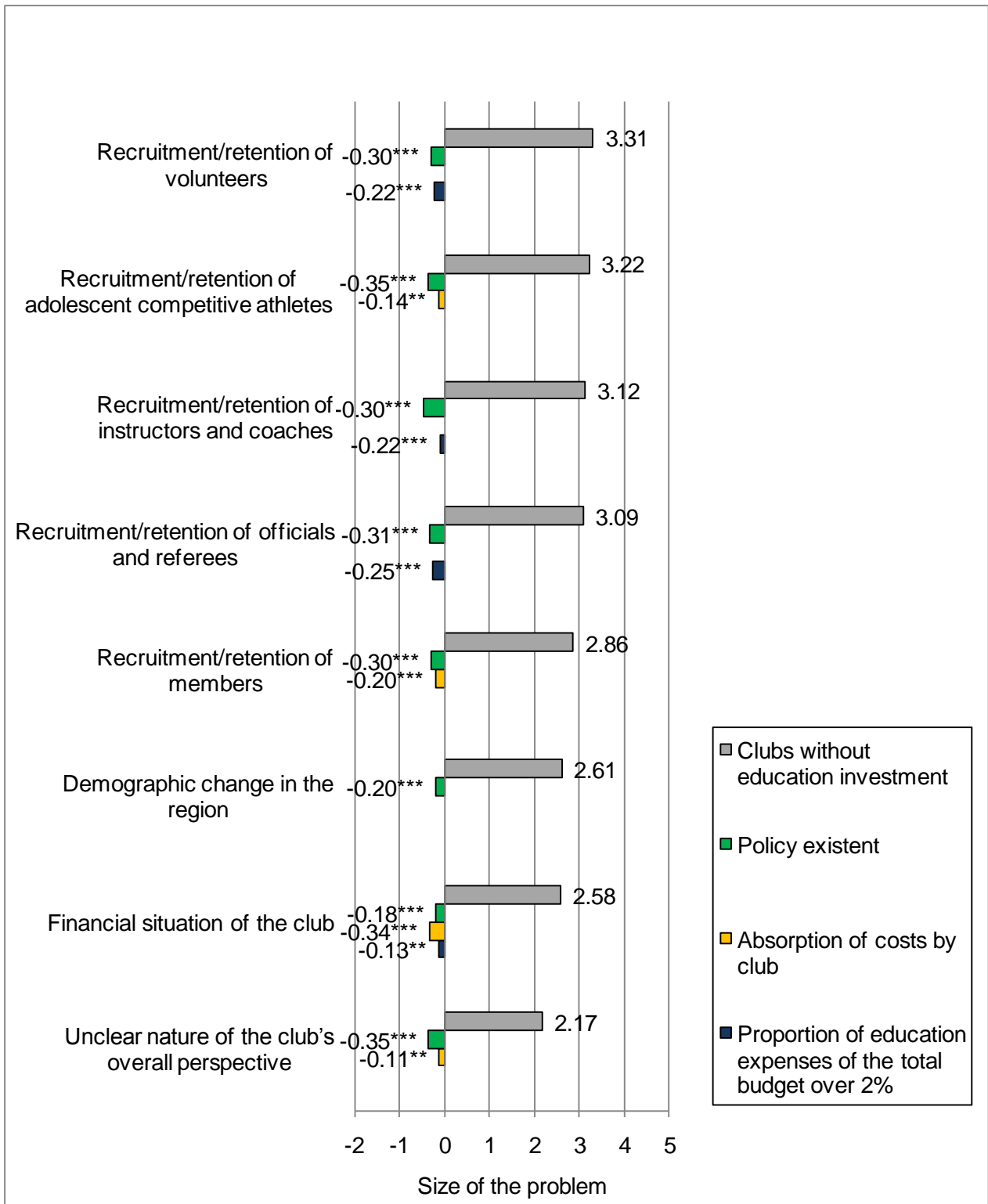


Figure 7: Size of club problems dependent on the education investment (1=no problem, 5=a very big problem).

### 3.4 Effects of the economic situation of the community on the need for support of sports clubs

Further analysis shows that the economic situation of a community plays an important role with regard to the severity of the clubs' problems, regardless of the size of the community (see Table 28).

*Table 28: Effects of the communal indicators on the size of sports clubs problems (+=problem increases; -=problem decreases).*

Problem	Indicator		
	Population	Unemployment rate	Per-capita income from wages and income taxes
Recruitment/retention of members	+		
Recruitment/retention of adolescent competitive athletes			-
Recruitment/retention of volunteers		-	
Recruitment/retention of coaches/instructors		-	-
Recruitment/retention of referees and officials	-	-	-
Financial situation of the club	+	+	-
Expenses for sports competitions			-
Availability of sports facilities	+	+	+
Condition of the sports facilities	+	+	+
Adequacy of the sports facilities for the sports supply	+	+	
Local competition from non-profit sports clubs	+		
Local competition from commercial sports providers	+		+
Number of laws, orders and directives	-		
Unclear nature of the club's overall perspective			-
Demographic change in the region	-	+	-

Thus, with the economic strength (indicator: income per capita from wages and income taxes) of a community there are increasing problems concerning sports facilities and the competition from commercial sports providers. Problems



concerning the financial situation of the club as well as the demographic change are decreasing – regardless of the size of the community – given a prospering economic situation (indicators: per capita income from wages and income taxes, unemployment rate; see Table 28).

### 3.5 Public sports facilities

In total 58.0% or alternatively 52,600 sports clubs use public sports facilities (also school facilities). This proportion has increased slightly from 2007 to 2009. For 44.5% of the sports clubs which use public sports facilities, the use of the facilities is free of charge or exchange services. On the other hand, a good 42% of the sports clubs have to offer some kind of service in exchange while 45% have to pay usage fees. The indexes depict that the use of public sports facilities is associated with reduced costs and exchange services for sports clubs (see Table 29). In the mean, 39.1% of the hours public sports facilities are used by clubs have to be paid for. The average usage fee in the year 2008 for one hour was €4.62.

*Table 29: Use of public sports facilities and their development.*

	Proportion of clubs (in %)	Clubs (total)	Index (2007=0)
Use of public sports facilities	58.0	52,600	+5.8***
Of which require usage fee	44.7	23,500	
Of which require exchange services	42.3	22,300	-11.5***
Of which have no usage fee and no exchange services	34.0	17,900	+21.7***

### 3.6 Finances

On average, sports clubs in Germany spend the most on (1) coaches/instructors, followed by (2) costs of maintenance and service of self-owned facilities, (3) costs of equipment and clothing as well as (4) costs of the execution of own sports events. In comparison to two years ago, the costs for coaches/instructors, the execution of own sports events, non-sports-related events, maintenance personnel, the Gema-fee (radio charges for music that is played publically) and insurance, as well as general administrative costs and travel costs for training and competitions, have risen significantly (see Table 30).

Table 30: Expenses of sports clubs in 2008 and their development.

Expenses for	Mean (in €)	Index mean (2007=0)	Proportion of clubs that have the expense (in %)
Coaches/instructors	9,122	+19.7**	59.1
Maintenance and service of self-owned facilities	6,354		50.5
Sports equipment and clothing	2,892		71.1
Execution of own sports events	2,812	+46.4**	59.8
Maintenance personnel	2,319		11.1
Membership fees to sports organisations	2,306		86.6
Rent and compensation for the use of other-owned sports facilities	1,989		43.6
Debt services (interest)	1,974		20.7
General administrative costs	1,794	+47.0**	64.0
Non-sports-related events (e.g., convivial gatherings)	1,693	+26.8*	57.6
Maintenance staff, ground keepers	1,659	+24.2*	21.2
Travel expenses for training and competitions	1,596	+49.2*	38.1
Insurances	1,096	+21.2*	73.5
Payments to athletes	933		5.8
Taxes of all kinds	881		29.7
Accruals	756		14.4
Gema-fee (radio charges for music that is played publically)	110	+27.5*	30.4
Other expenses	3,422		23.1

Sports clubs in Germany generate the highest revenues from (1) membership fees, (2) donations and (3) cost-related services performed by members (field or sports hall rent amongst others). The indexes show that in comparison to two years ago, various revenue streams have grown in importance. These include revenues from membership fees, admission fees, convivial gatherings, course fees, sponsorship contracts from periphery advertisement as well as subsidies from the federal state. Over the same time period sports clubs have been able to generate fewer revenues from other support programmes (employment centres; see Table 31).

Table 31: Sports clubs' revenues in 2008 and their development.

Revenues from	Mean (in €)	Index Mean (2007=0)	Proportion of clubs with revenues in this area (in %)
Membership fees	21,139	+12.9*	100.0
Donations	3,666		77.4
Cost-related services for members (e.g., field or sports hall rent)	2,289		15.3
Subsidies from the district/community	2,074		57.2
Sports events (revenues from entrance fees etc.)	2,045		40.6
Self-managed restaurants	1,744		17.0
Convivial gatherings (e.g., club socials)	1,529	+32.8*	37.7
Subsidies from sports organisations	1,501		50.1
Sports course fees	987	+52.7**	16.1
Sponsorship from periphery advertisement	868	+35.0*	22.3
Fund management (e.g., revenues from interest)	813		33.8
Subsidies from the federal state	768	+62.7*	24.2
Sponsorship from printed advertisements	657		15.5
Cost-related services for non-members	598		10.9
Sponsorship from jerseys and equipment	581		12.6
Raising of credit	498		2.1
Admission fees	323	+25.4**	30.5
Business operations	314		2.0
Subsidies from other support programmes (e.g., employment bureau)	180	-72.4*	3.3
Sponsorship from broadcasting	141		0.5
Subsidies from the European Union (e.g., EU Structural Funds, SOCRATES, LEONARDO, JUGEND)	3		0.4
Other revenues	2,913		20.3

## 4 Methodology

### 4.1 Background

The Sports Development Reports – “Analysis of the situation of sports clubs in Germany” – present an advancement of the former financial and structural analysis of sports in Germany (FISAS). The objective is to provide policy-makers in organised sports as well as decision-makers in sports politics and administration with managerial and political information (knowledge of argumentation and knowledge of action). With the aid of this support, the competitive ability of organised sports should be sustained in times of a dynamic social change. This project is financed by the 16 federal state sports confederations, the DOSB as well as the Federal Institute of Sport Sciences<sup>11</sup>. On 26<sup>th</sup> June 2007, University Professor Dr. Christoph Breuer from the Institute of Sports Economics and Sport Management of the German Sport University, Cologne, was assigned to carry out the second and third waves of the Sports Development Reports. The methodological central idea was to create a panel design, which means that the same sports clubs should be questioned on their individual situation every two years. Therewith, the first three waves of the Sports Development Report (2005/06, 2007/08 and 2009/10) present systematic information about sports club development for the first time.

### 4.2 Sample and response rate

This research was carried out by means of an online survey, so there was no change in method compared to the first two surveys. The survey was carried out between 1<sup>st</sup> October and 20<sup>th</sup> December 2009. The sample was based on the e-mail addresses of sports clubs which were provided by the federal state sports confederations. Out of the 90,767 existent sports clubs in Germany 68,396 were made available. The number of e-mail addresses provided differed from federal state to federal state. After the deletion of duplicate e-mail addresses, 63,468 sports clubs were contacted via e-mail. Sports clubs, which could not participate for whatever reasons, were taken out of the sample. A large part of the failures (about 5,400) was due to false e-mail addresses. Altogether n=19,345 interviews were realised, which equals a response rate of 33.3% (see Table 32). Compared with the last survey in 2007 the sample size has increased by 48%.

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<sup>11</sup> Reference number IIA1-080902/07-11.

*Table 32: Sample of the Sports Development Report 2009/2010 for Germany.*

Sports Development Report 2009/10	N	Proportion of sample I (in %)	Proportion of sample II (in %)
Population	90,767		
Sample I	63,468	100.0	
False e-mail addresses, person is not part of the club anymore, club no longer exists/or in the process of winding up, refusal	5,399		
Adjusted sample II	58,069		100.0
Realised interviews	19,345		
Participation (in %)	21.3	30.5	33.3

### 4.3 Longitudinal data and calculation of indexes

With regard to the construction of a longitudinal database, all sports clubs were given unchangeable numbers (ids). The number facilitates identification of the sports clubs participating in the respective surveys. Altogether, n=1,211 sports clubs participated in the surveys in 2005 and 2009, while n=5,026 sports clubs participated in the 2007 and 2009 surveys<sup>12</sup>. This is equivalent to a retainer-quota of 32.5 % and 38.5 %, respectively.

Beginning with the second survey, changes in the common welfare production as well as in the problems of German sports clubs can be measured based on the longitudinal dataset. Throughout the presented third wave of the Sports Development Report, developments are measured between 2007 and 2009 as this longitudinal dataset offers a more comprehensive and therefore reliable database. Merely in the sections on club philosophy and sports club types the use of the longitudinal data from 2005 to 2009 is used, since club philosophy was not sought in the second wave in 2007.

The extent of the development is quantified with the help of indexes, which show the percentage changes. The calculation of the indexes is based on the value of the respective base year. For example an index of +12 implies that (in the longitudinal dataset) the value in question has increased by 12%. In the tables and figures the base year (year of the survey) is depicted by the label "Index (2005=0)" or "Index (2007=0)" respectively, where the first refers to the Sports Development Report 2005/06 and the latter refers to the Sports Development Report 2007/08.

<sup>12</sup> The sample size of the Sports Development Report 2005/06 was n=3,731 clubs, and for the Sports Development Report 2007/08 n=13,068 clubs.

With reference to indexes it is important to recall that indexes can be large even if developments were small (e.g., the change of a value from 0.5% to 1.5% would result in an index of +200).

Moreover, the statistical significance of the changes was checked (test of significance: t-test). The underlying report will only present the significant indexes. The probability of error which is important in order to determine the significance is demonstrated with the common designation (see Table 33).

*Table 33: Overview of the probabilities of error in statistical calculations and their designations.*

Symbol	Meaning
n.s.	not significant, the probability of error of the calculation is higher than 5%
*	significant, the probability of error of the calculation is equal/less than 5%
**	very significant, the probability of error of the calculation is equal/less than 1%
***	highly significant, the probability of error of the calculation is equal/less than 0.1%

## 4.4 Data analysis

In Chapters 2.2.1 to 2.2.5, as well as in 2.10, further structural analyses were conducted. Here, the software PASW Modeler 14.0, a programme from the data mining area was used. By means of data mining the most important structural features of certain clubs can be identified. In comparison to a differentiation by, for example, the size of a club, the most important distinctive criteria are analysed and presented. Whereas for regular analyses the distinctive criteria (e.g., number of members) are set in advance, data mining makes it possible to detect these criteria. The number of members rarely presents the most important distinctive criterion. Thus, data mining possesses an increased explorative character compared to conventional statistics. Another advantage of data mining is that multiple procedures and algorithms are conducted simultaneously. This can lead to better quality results in the sense that patterns and structures are detected, which would have been undetected with conventional statistical analysis. For the underlying analyses various decision trees were applied.

In order to be able to make statements concerning communal integration, the underlying data of the survey was matched with the local administrative data of

2008 (Federal and Regional Statistical Offices, 2008). The data was matched with the help of the so-called administrative communal number (AGS) that could be assigned to each club over its postal code. The data of the administrative statistic contained information concerning housing, work, and financial situations of the communities in Germany. From the results Chapter 2.11 analyses whether there are significant differences between sports clubs in communities of 20,000 inhabitants and sports clubs in bigger communities (significance test: analysis of variances). The analysis was conducted in pairs with clubs in communities of up to 20,000 inhabitants being the point of comparison.

Chapter 3.2 analysed whether the five sports club types differ regarding the severity of problems they are facing. Here, multivariate regression analyses were conducted taking the problem items as dependent variables. At first, the different club types (mean values) and after that the strong agreement to one sports club type (dummy variables: 0= mean value of the agreement<4; 1=mean value of the agreement is 4 or higher) were entered as independent variables. The probability of error of the statistical calculations is designated as usual (see Table 33).

Chapter 3.3 analysed whether education investment has a positive or negative effect on the severity of the clubs' problems. In this context, the following three indicators were used: 1) clubs have a policy for the training and education of their employees (short: policy existent), 2) clubs normally cover the costs of training and education programmes (short: absorption of costs by club) and 3) proportion of the total budget of the club for expenses of training and education in the year 2008 (short: proportion of total budget for education expenses). The first two variables are dummy variables (0=no, 1=yes). For the third variable a dummy-variable was created with the median serving as a separation value (median=2.048%). Thus, clubs with a proportion of the total budget for education expenses of up to 2.048% are compared to clubs with a proportion of at least 2.048%.

In order to test which indicators have a significant effect on the size of the clubs' problems, linear regression analyses were carried out (method: stepwise). Here, the clubs' problems were the dependent variables and the indicators the independent variables. For a better demonstration of the effects, the non-standardised regression coefficients (b-values) were presented. Here, the problem value is the basic value and the respective effects of the indicators are added or respectively subtracted. The size of the probability of error, which is important for the significance, is designated as usual (see Table 33).

Chapter 3.4 analysed whether the situation of the community has an effect on the problems of the club. For this analysis the following three indicators were chosen: (1) population in 10,000 inhabitants, (2) number of unemployed people per 1,000 inhabitants and (3) per-capita income of the community from wages and income

taxes (in €1,000). In order to check which of the aforementioned factors has an effect on the size of the problems, regression analyses with problems as dependent and the three indicators as independent variables were carried out. This report shows only significant effects.



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