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Sports Clubs in Germany: Results from the 8th wave of the Sport Development Report

Sport Development Report for Germany 2020-2022 - Part 1

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Table of Contents

1 Introduction

With the eighth wave of the Sport Development Report for Germany (SDR), the second survey wave within the framework of „SDR 3.0“ is now available. The „SDR 3.0“ includes the implementation of the seventh to ninth wave of the Sport Development Report. As in the first six survey waves, the core methodological idea lies in the further development of a sports club panel. However, from the seventh wave onwards, sports clubs are asked about their situation online every three years instead of every two years. In addition to surveying the organisations themselves, new elements of „SDR 3.0“ are the so-called stakeholder surveys, i.e. surveys of different groups of people. In this way, a multi-level panel design is created. In the present eighth wave, in addition to the clubs, members as well as referees were surveyed in this context[1].

The present report, therefore, contains both evaluations of the organisational survey, i.e. the sports clubs (Chapter 2) and a selection of evaluations of the individual surveys (Chapter 3). Detailed evaluations of the personal surveys are carried out in separate reports.

At this point, it should be pointed out that some questions in the context of the eighth wave of the club survey (e.g. in the area of volunteers, paid work and finances) relate to the reference year 2019, i.e. the year before the corona pandemic. In this respect, these evaluations do not yet reflect the situation during the pandemic. However, another club survey was also carried out in spring 2021, in which the personnel and financial situation in 2020 was discussed (cf. Breuer, Feiler & Rossi, 2021a).

It should also be noted that the survey of the clubs was designed and started before the second lockdown in autumn of 2020. The survey started on October 23rd, 2020 and on November 2nd, 2020, Germany went into the second lockdown after only a very short notice. As a result, the sports clubs were also significantly re-

1 Detailed information on the individual surveys can be found in the methods chapter (Section 4).

stricted in their activities. For this reason, at selected points in this report, a distinction is made between the clubs that took part in the survey before the second lockdown and those clubs that took part in the survey from 2nd November 2020, i.e. during the second lockdown.

2 Organisations

2.1 The importance of sports clubs for Germany

2.1.1 Self-conception

In order to be able to assess the social importance of sports clubs, it is first of all important to know what they stand for and what makes them important with regard to their target function. Therefore, as in the previous waves, the sports clubs were first asked about their self-conception.

A five-point scale (from 1="do not agree at all" to 5= "strongly agree") was used to assess the self-conception of different items. Accordingly, in 2020, sports clubs continue to attach particular importance to community (*M*=4.46) and see themselves as a community based on solidarity (*M*=4.27). Furthermore, democratic participation in the club is important to the clubs (*M*=4.25) and improving what has been done so far (*M*=4.24). In addition, the sports clubs state that they communicate regularly with their members (*M*=4.17), which seems particularly important in times of crisis. In addition, the sports clubs attach importance to the qualification of their coaches and trainers (*M*=4.00) as well as to the further education and training of volunteers (*M*=3.66), even if the latter target function is somewhat less pronounced (see Fig. 1).

The sports clubs also state that they continue to be particularly involved in children's and youth sports (*M*=4.00), while a specific commitment in senior sports (*M*=3.44) and in girls' and women's sports (*M*=3.21), as already established in the last wave of the Sport Development Report, is somewhat less pronounced on average. This also applies to the areas of health sports (*M*=2.98) and competitive sports (*M*=2.67). The commitment of sports clubs to people with disabilities (*M*=2.63) and to refugees (*M*=2.45) is even lower (see Fig. 1 and Fig. 2).

The commitment of sports clubs in the areas of doping prevention (*M*=2.30) and prevention of match-fixing (*M*=2.54) is on average rather low, which may also be due to the fact that only some of the sports clubs focus on competitive sports. Club involvement in the area of preventing sexualized violence and child protection is moderate on average (*M*=3.05), but is well below the value for a focus on children and youth sports (*M*=4.00; see above). The sports clubs are also only moderately involved in environmental and climate protection (*M*=2.81).

On average, the clubs are only very slightly involved in e-sports (*M*=1.65). However, on average, the clubs see an opportunity in digitalization (*M*=3.42; cf. Fig. 2).

Overall, it is noticeable that the average agreement with the items of self-conception has decreased slightly, but significantly, compared to the last wave of the SDR in 2017 in all areas that were also surveyed in 2017. A possible explanation could be the overall limited offer of the clubs due to the corona pandemic and, thus, a perceived limited commitment in the different areas. In addition, the decline in immigration by refugees at the time of the survey should explain the slight reduction in commitment to refugees.

If, in addition to the mean values, one also looks at the distribution of agreement with the specified categories of the self-conception, the following picture emerges (cf. Fig. 3 and Fig. 4):

More than half of the sports clubs (58 %) strongly agree with the statement that the community is valued and that they are involved in sports for children and young people (55 %). In addition, 46 % of the clubs fully agree that they see themselves as a community of solidarity, and 45 % fully agree that democratic participation in the club is important. Around 43 % also attach importance to wanting to improve on what has already been done and to the qualification of the trainers and coaches. Around a third of the clubs also attach importance to tradition, membership growth and developing new things (see Fig. 3).

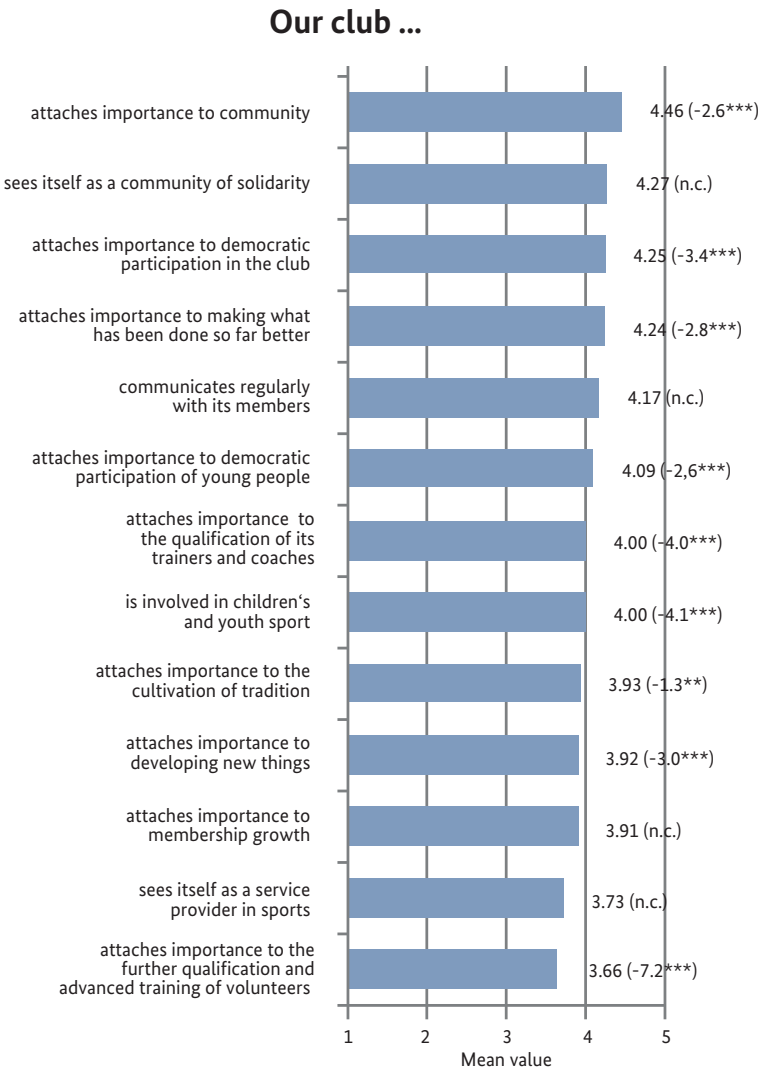

Fig. 1: Self-conception of the sports clubs (part 1; 1= "do not agree at all" to 5="strongly agree"; index: 2017=0; n.c.=not covered 2017/2018).

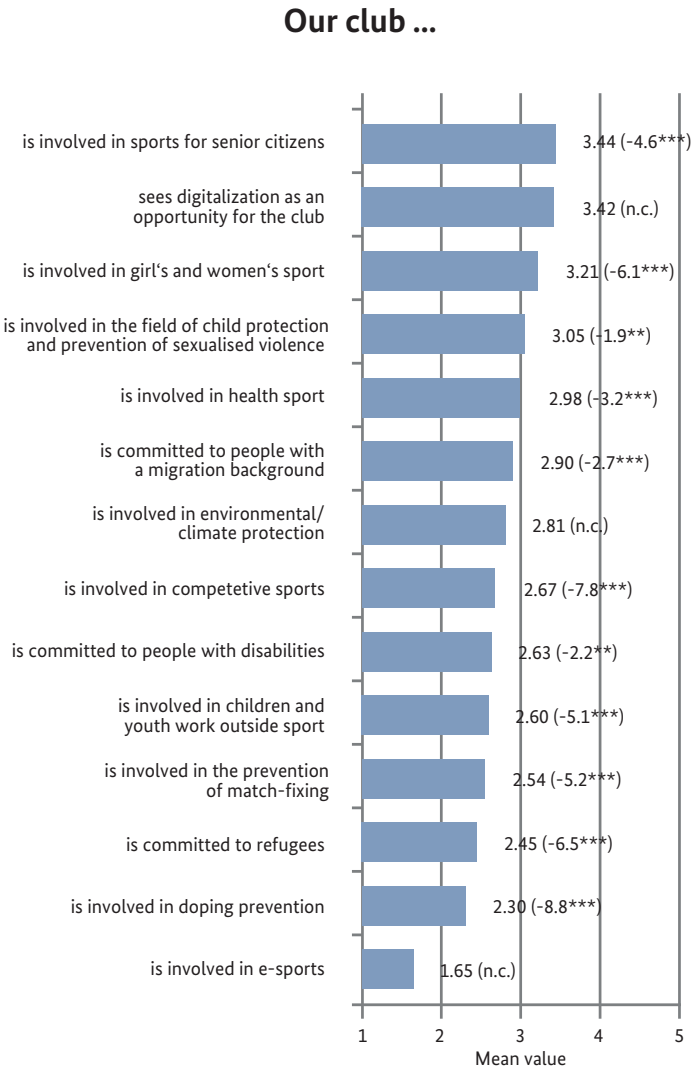

Fig. 2: Self-conception of the sports clubs (part 2; 1= "do not agree at all" to 5="strongly agree"; index: 2017=0; n.c.=not covered 2017/2018).

Looking at the rejections of the clubs, some interesting findings can be detected. The strongest rejection is to (not) get involved in e-sports. Almost two-thirds of the clubs do not agree to a commitment here. In addition, non-agreement is still very pronounced in the areas of doping prevention (43 % "do not agree at all") and in the prevention of match-fixing (32 %; cf. Fig. 4[2]).

In addition, the commitment of some clubs in the area of child protection should be expanded: 23 % of the clubs do not agree at all with the statement that they are involved in the area of child protection and the prevention of sexualised violence. But only 10 % emphasize that they are not involved in children's and youth sports at all. Conversely, 55 % fully agree with the statement that they are involved in children's and youth sports. But only 23 % of the clubs fully agree with the statement that they are involved in the areas of child protection and the prevention of sexualized violence.

According to their own statements, around 23 % of the sports clubs are not committed to helping people with disabilities, and a good fifth is not active in environmental or climate protection at all (see Fig. 4). While not every sports club has to serve every target group in order to provide the population as a whole with club offers, sustainability should be anchored in all clubs.

2.1.2 General structural features

2.1.2.1 Squad athletes

Competitive sport in Germany would hardly be conceivable without sports clubs. Almost 11 % or around 9,600 clubs have squad athletes from the Olympic squad (OK), perspective squad (PK), supple-

2 One explanation for the non-approval in the two above-mentioned subject areas could be that the clubs concerned are often not or hardly involved in competitive sports and therefore have little or no need to get involved in doping prevention and in the prevention of match-fixing.

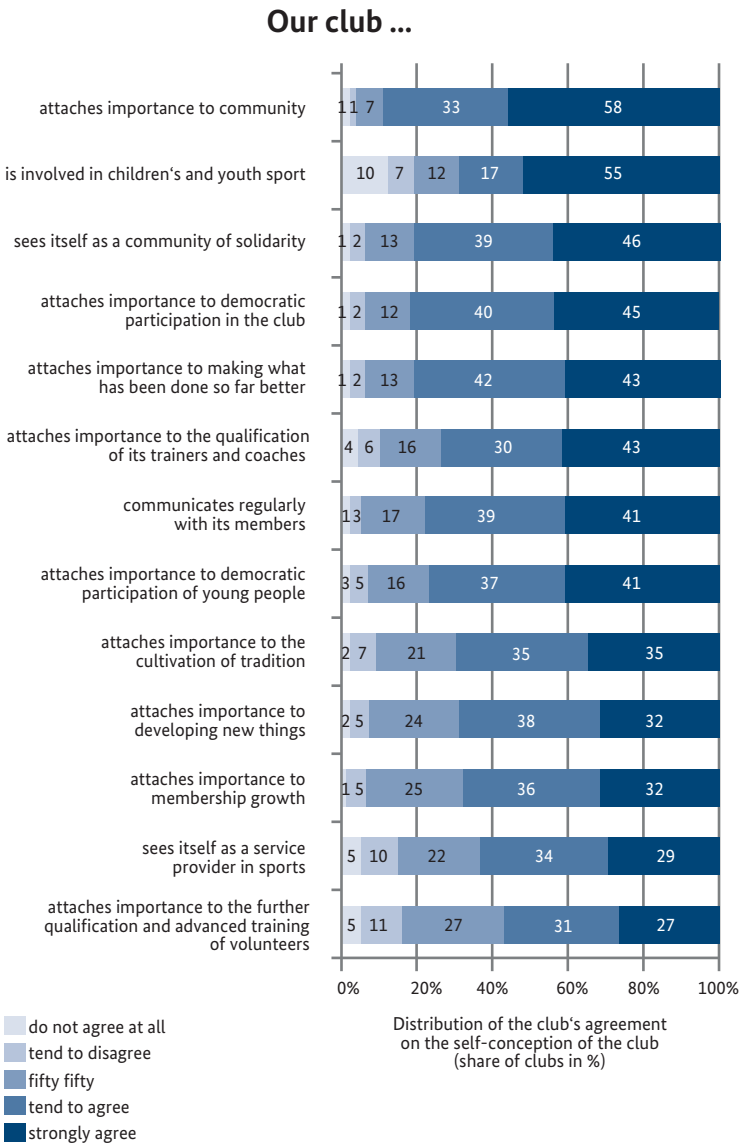

Fig. 3: Distribution of agreement on self-conception (part 1).

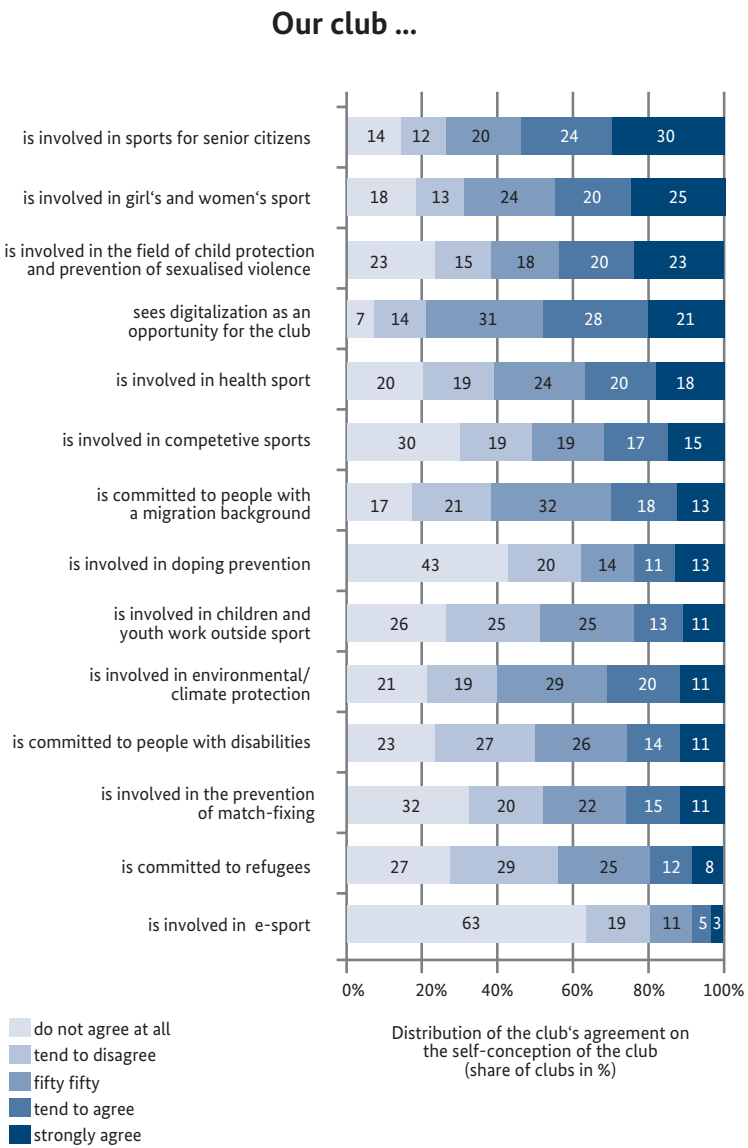

Fig. 4: Distribution of agreement on self-conception (part 2).

mentary squad (EK), junior squad (NK1 and NK2) and/or state squad (LK) in their ranks. They thus form an important basis for competitive/high-performance sport in the federal states and on a national level. Compared to 2017, however, significantly fewer clubs stated that they had squad athletes[3]. The decrease corresponds to around 25 % (cf. Tab. 1).

Tab. 1: Sports clubs with squad athletes and their development.

	Share of clubs (in %)	Clubs total	Index (2017=0)
Squad athletes available	10.9	9,600	-25.0***

2.1.2.2 Festivities and social events

In addition to the actual sport activities, the sports clubs in Germany (usually) also hold social events (e.g. summer festivals, club balls, Christmas parties). In 2019[4], 43.5 % of the members or around 12.1 million members took part in such events of their club (cf. Tab. 2).

Tab. 2: Members who took part in social events of their club in 2019 (share in %).

	Share of members (in %)	Members total
Parties and social events	43.5	12,095,000

In order to be able to offer social events, a good 61 % of the clubs have rooms for encounters, such as a club house or a club restaurant. Compared to the last survey, however, this proportion has fallen slightly (cf. Tab. 3).

3 In terms of development, it should be noted that the squad designation has changed since the last survey in 2017. In the last survey, squad levels A, B, C, D/C and D were queried, while the survey in 2020 related to the new squad structure OK, PK, EK, NK1, NK2 and LK.

4 Reference year of the survey. The basis for the extrapolation is the number of memberships in the DOSB in the reference year of 27,804,538 (cf. DOSB, 2020).

Tab. 3: Spaces for encounters in sports clubs and their development.

	Share of clubs (in %)	Clubs total	Index (2017=0)
Rooms available for meetings (e.g. club house, club restaurant)	61.1	53,800	-4.8***

2.1.3 Sport offers

2.1.3.1 Healthcare for the population

In the area of healthcare for the population, more than every third sports club or around 30,300 sports clubs in Germany offer health-related sports programmes (see Tab. 4).

Tab. 4: Clubs with health-related sports programmes[5].

	Share of clubs (in %)	Clubs total
Health sport in general	32.4	28,500
Rehabilitation/tertiary prevention	6.0	5,300
Disability/Chronic Illness	7.1	6,300
Total of health-related categories	34.4	30,300

Viewed in a differentiated way, most of the clubs that have sports offers in the health sector offer them in the general health sports sector (32.4 %). 6 % of sports clubs have offers in the field of rehabilitation and tertiary prevention, i.e. in particular therapeutic offers. Somewhat more clubs, namely a good 7 %, offer sports for physically and/or mentally handicapped and chronically ill people (cf. Tab. 4).

5 Developments are not shown here because the query has changed slightly. In the eighth wave, differentiated questions were asked about physical and mental disabilities, while in the seventh wave only general questions were asked about sport for people with disabilities or chronic illnesses.

If one looks at the health-related offers in relation to the entire sports offers of the clubs, it can be seen that, on average, 12.2 % of the sports offers are health-related. Programmes in the field of general health sports account for the largest proportion at 9.5 % of all sports offerings, whereas a smaller proportion (1.1 %) of all sports offerings come from the area of rehabilitation and tertiary prevention. Offers for the disabled and the chronically ill account for 1.6 % of all sports offers (cf. Tab. 5).

Tab. 5: Proportion of health sports offers in all sports offers of sports clubs.

	Share of offers (mean in %)
Health sport in general	9.5
Rehabilitation/tertiary prevention	1.1
Disability/Chronic Illness	1.6
Total across health-related categories	12.2

2.1.3.2 Cooperations

In order to be able to offer a wide range of sports and thus further strengthen the character of the common good, the sports clubs work together with numerous other actors when creating their offer. The most common form of cooperation is cooperation with other sports clubs: more than a third of all clubs, or extrapolated around 32,600 clubs, cooperate with another sports club. Almost a third of the clubs also cooperate with a school, and almost 18 % with a kindergarten or day-care centre. A good 6,000 sports clubs also stated that they work together with a health insurance company when preparing the offer, and around 5,000 clubs cooperate with a commercial sports provider, e.g. a fitness studio. In addition, around 4,500 clubs stated that they work together with a business to create offers, and around 4,000 sports clubs create joint offers with institutions for the disabled, such as “Lebenshilfe”. Somewhat fewer clubs cooperate with

basic security and youth welfare offices, senior citizens' facilities, health authorities and multi-generation houses (see Tab. 6).

If you look at the development of cooperation compared to 2013[6], you can see slight increases in the joint creation of offers by sports clubs with other sports clubs and with commercial sports providers. On the other hand, cooperations with schools, health insurance companies and youth welfare offices are declining. In the other areas there are no significant changes compared to 2013 (cf. Tab. 6).

Tab. 6: Joint preparation of offers by sports clubs with other institutions (share of clubs in %) and their development since 2013.

Cooperation in the preparation of the offer with…	Share of clubs (in %)	Clubs total	Index (2013=0)
other sports club	37.0	32,600	+12.5***
school	32.6	28,700	-10.8***
nursery/daycare (Kindergarten)	17.7	15,600	
health insurance	6.9	6,100	-11.1***
commercial sports provider (e.g. gym)	5.7	5,000	+25.0*
business enterprise	5.1	4,500	
disabled facility (e.g. Lebenshilfe)	4.5	4,000	
basic security office (e.g. employment office)	3.3	2,900	
youth welfare office	3.3	2,900	-25.0*
senior facility	2.8	2,500	
health department	1.1	1,000	
multi-generation house	0.7	600	
other facility[7]	7.8	6,900	

6 Cooperations were last surveyed in the fifth wave of the Sport Development Report (2013/2014).

7 In particular, associations and other municipal offices in municipalities were mentioned here.

2.1.3.3 Club offers during the Corona pandemic

The survey of sports clubs took place as scheduled in autumn 2020. In order to find out what effects the first lockdown (March to May 2020) due to the Corona pandemic had on the various club offers, the clubs were asked to give an assessment of the extent to which the first lockdown had affected different areas in the club. At the time the questionnaire was designed, it was not foreseeable that a second lockdown would come into force during the survey period. Therefore, in the following analysis, a distinction is made between clubs that took part in the survey before the second lockdown and clubs that took part in the survey from November 2nd, 2020, i.e. at the start of the second lockdown[8].

Overall, there are significant differences in almost all areas between clubs that took part in the survey before the second lockdown and clubs that took part during the second lockdown. Clubs that responded during the second lockdown (and should therefore also relate the answer to the second lockdown) more frequently stated that they offered fewer sports activities and fewer training sessions. On average, however, social events were only offered to a limited extent by all clubs in the summer of 2020, i.e. after the first lockdown (cf. Tab. 7).

8 61.6 % of clubs took part in the survey from 2nd November 2020, i.e. in the second lockdown.

Tab. 7: Offers during the Corona pandemic (scale from 1 = "does not apply at all" to 5 = "fully applies"; n.s. = not significant).

	mean total	Participation before the 2nd lockdown	Participation in the 2nd lockdown	sig.
Our club offers fewer sports offers (including courses and offers for certain age groups) than before the lockdown.	3.35	2.77	3.65	0.000***
Our club offers fewer training units per week in its sports offers than before the lockdown.	3.49	2.77	3.88	0.000***
Our club offers more training sessions during the school holidays than before the lockdown.	1.72	1.73	1.72	n.s.
Members come to training sessions less often than before the lockdown.	3.34	3.03	3.50	0.000***
Our club offers fewer social events than before the lockdown.	4.50	4.39	4.55	0.000***

2.1.4 Resources

2.1.4.1 Staff

2.1.4.1.1 Voluntary commitment

Overall, in 2019, i.e. the year before the corona pandemic, members were involved in around 2 million voluntary positions in Germany's sports clubs. Around 1.3 million positions were filled by men and 0.7 million positions by women (see Tab. 8).

Tab. 8: Voluntary positions in 2019[9].

Number of volunteers	Mean	Total
Board members	6.5	576,100
... of which male	4.5	399,700
... of which female	2.0	176,400
Department heads	2.3	202,700
... of which male	1.6	139,600
... of which female	0.7	63,100
Cash auditors	2.0	172,700
... of which male	1.3	114,100
... of which female	0.7	58,600
Referees / judges	2.3	204,700
... of which male	1.6	144,900
... of which female	0.7	59,800
Coaches / trainers	9.0	789,600
... of which male	5.4	474,600
... of which female	3.6	315,000
Other function	0.9	81,800

9 Longitudinal changes from the previous survey in 2017 are not shown here, as the survey of volunteer positions has changed slightly. In the present eighth wave, questions were only asked about board members and department heads, while individual board positions were queried in a differentiated manner in wave seven. A direct comparison is therefore not meaningful from a methodological point of view.

Number of volunteers	Mean	Total
... of which male	0.6	53,600
... of which female	0.3	28,200
Total	23.0	2,027,600
... of which male	15.0	1,326,500
... of which female	8.0	701,100

If you look at the number of honorary positions broken down by board and executive level[10], there were an average of 6.5 board members and 2.3 department heads in sports clubs in Germany in 2019. In addition, the clubs had an average of 2 cash auditors. On the execution level, an average of 9 coaches and trainers worked on a voluntary basis[11] as well as 2.3 referees and judges. In addition, there was on average just under one other honorary position. Overall, i.e. across all functions and levels, it is noticeable that men still hold comparatively more positions than women (cf. Tab. 8).

The presentation of volunteers in permanent positions in sports clubs in Germany in 2019 does not yet include the services of volunteers who, in addition to the volunteers in a fixed position, participated in separate supporting tasks in 2019 sporadically (e.g. at sports events, club festivals, driving services, renovations, etc.). In 2019, around 24 % of the club members worked as sporadic volunteers, i.e. without a fixed position. This means extrapolated[12] that in 2019, i.e. before the Corona pandemic, around 6.7 million members were involved as volunteers in sporadical volunteer tasks in the

10 Board members and department heads are assigned to the board level, while functions below the board level are assigned to the executive level. These functions are designed to last, have more than a minor scope and are of great importance for ensuring the club's offers and competition operations. This includes in particular coaches and trainers, referees and judges as well as other honorary functions in the club outside the board level.

11 Coaches and trainers who have received no expense allowance or an expense allowance up to the amount of the trainer flat rate valid at the time (€ 2,400 per year).

12 The basis for the extrapolation is the number of memberships in the DOSB in the reference year of 27,804,538 (cf. DOSB, 2020).

clubs (cf. Tab. 9). If you add these volunteers to the people with a voluntary position, this results in a total[13] of up to 8.7 million volunteers in the sports clubs for the year 2019.

Tab. 9: Sporadic volunteers in 2019.

	Share of members (in %)	Members total
Sporadic volunteers	24.1	6,689,800

Looking at the age of the volunteers, and particularly younger people under 30 years old, it shows that, especially in the area of coaches and trainers, a considerable proportion of almost 17 % is under 30 years old. In addition, every tenth volunteer among the board members and referees and judges is younger than 30 years (cf. Tab. 10). In areas with a direct connection to sport, entry into voluntary work seems to be the most obvious.

Tab. 10: Percentage of under 30-year-olds in voluntary positions in sports clubs in 2019.

Percentage U30...	Share of volunteers (in %)
among board members	10.6
among department heads	4.4
among cash auditors	7.3
among referees / judges	10.1
among coaches / trainers	16.7
among the other honorary functions	2.2

2.1.4.1.2 Support services for referees and judges

Referees and judges are an indispensable human resource for sports clubs. However, every fifth club also sees a very big problem in retaining and recruiting referees and judges (see Fig. 13). Therefore,

13 In the total number, however, it should be noted that people who are both volunteers in fixed positions and sporadic volunteers are included twice.

the sports clubs in Germany offer various measures to support the referees and judges.

If one looks at how strongly the clubs rely on the different support services (on a scale from 1="not at all" to 5 ="very much"), it becomes clear that the most frequently used measure is the assumption of costs for further education and training of referees and judges. This can relieve the financial burden on referees and at the same time create an incentive to continue their education. The average level of support is given as *M*=3.17 (see Fig. 5), which means that more than half of the clubs state that they use this measure (very) much (see Fig. 6). Compared to coaches and trainers (*M*=3.74) and honorary board members (*M*=3.29), the level of support here is somewhat less pronounced (cf. Breuer & Feiler, 2019).

Furthermore, the clubs rely on supporting the referees in introducing new ideas (*M*=2.55), rewarding them with honours and awards (*M*=2.41) and other financial incentives in the form of expense allowances (*M*=2.37) and travel allowances (*M*=2.36). The clubs also offer to provide sports clothing and sports shoes (*M*=2.35) as support for the referees and judges (see Fig. 5). It is noticeable that this support measure is used more frequently on average than by coaches, trainers and honorary board members (cf. Breuer & Feiler, 2019).

If one also looks at the distribution of the strength of the support measures (see Fig. 6), it is noticeable that a good one in ten clubs relies heavily on reduced fees for referees, while two-thirds of the clubs do not use this support measure at all. It is also striking that around half of the clubs offer neither expense allowances nor travel allowances or material incentives in the form of sports clothing and sports shoes for the referees (see Fig. 6).

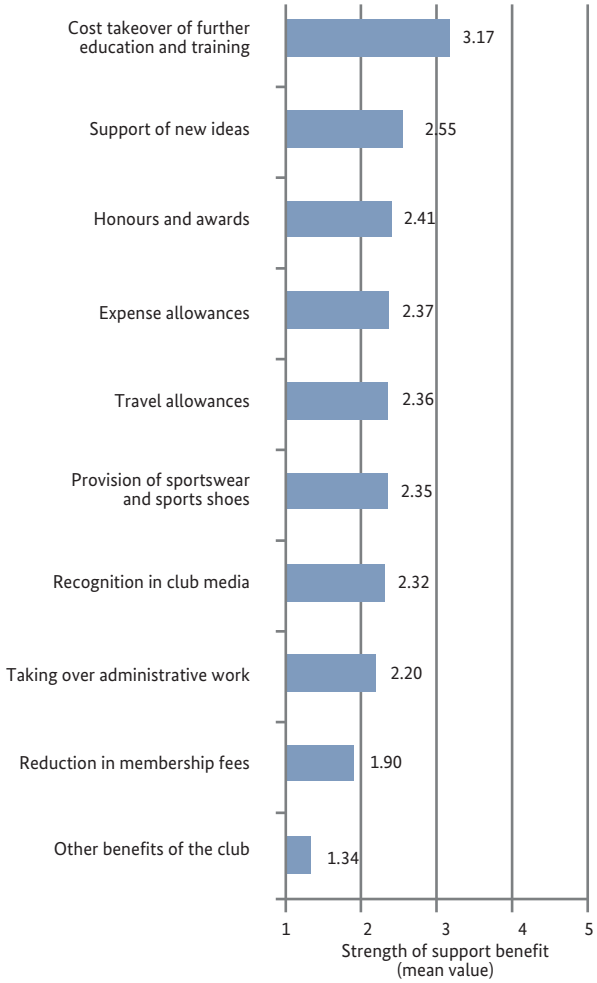

Fig. 5: Support services of the sports clubs for referees, according to the strength of the support (1 = "not at all", 5 = "very strong").

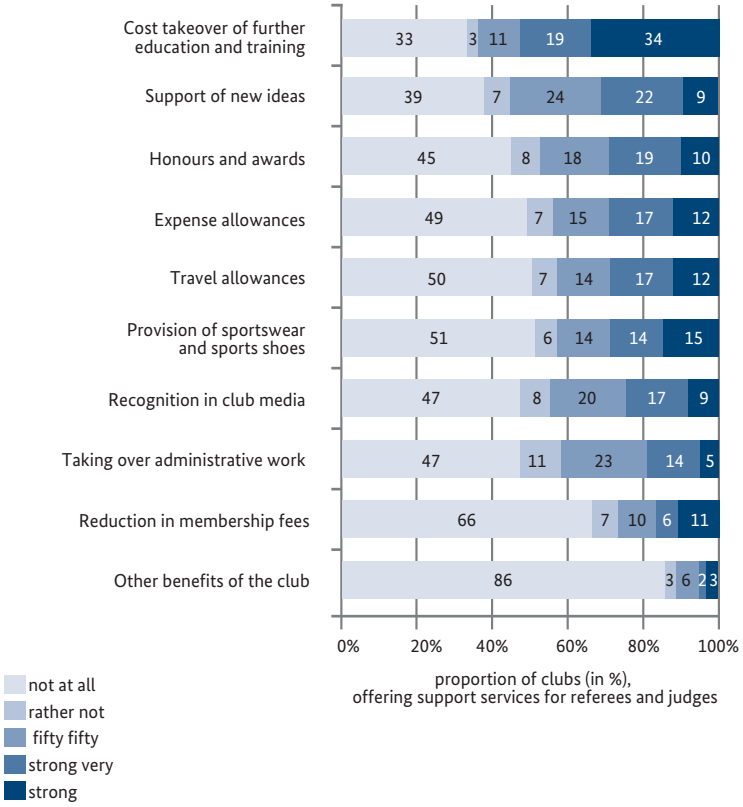

Fig. 6: Distribution of the strength of support services for referees.

2.1.4.1.3 Paid staff

In addition to volunteers, there were also paid employees in some clubs in 2019. This includes both full-time and part-time positions as well as marginal part-time employees and freelance workers. A good one in ten clubs had paid employees in management and administration in 2019, while almost a third of the clubs employed paid employees in the areas of sports, practice and training opera-

tions. In addition, almost 19 % of the clubs employed paid staff in other areas such as technology, maintenance or care (cf. Tab. 11).

Tab. 11: Paid employees in the club in 2019.

Area	Share of clubs (in %)	Clubs total
Leadership and administration	10.5	9,250
Sports, exercise & training operations	32.8	28,900
Other areas (e.g. technology, maintenance, care)	18.9	16,650

If you continue to look at the number of paid employees in the clubs in 2019 who had such, it shows that an average of 2.4 employees were employed at the management and administrative level. The majority of those in marginal part-time employment accounted for this. The clubs also had an average of 0.7 full-time equivalents[14] and 0.3 fee-based positions. Thus, before the Corona pandemic, almost 22,000 people were employed in management and administration in sports clubs in Germany (see Tab. 12).

In the area of sports, exercise and training operations, the number of paid employees was higher. Clubs that had paid staff in this area, there were on average almost 6 employees. The largest proportion worked on a fee basis (M=2.8). In addition, an average of 1.7 people were marginally employed in the sports sector, while only 0.4 FTEs were to be found in this sector. In total, the sports clubs in Germany employed a good 164,100 paid employees in sports, exercise and training operations in 2019. There were also a further 30,550 paid employees in other areas, such as technology, maintenance and care. Here, the largest proportion was accounted for by marginal part-time employees (cf. Tab. 12).

14 A full-time position corresponds to a full-time equivalent (FTE). For example, if a club has one person who works full-time and one person who works part-time half of the full working time, this corresponds to 1.5 FTE.

Tab. 12: Number of paid employees in the clubs in 2019 (mean value if there were paid staff in the club; FTE=full-time equivalent).

Area	Number (mean)	Total
Overall leadership and administration	2.4	21,900
... thereof FTE	0.7	6,800
... of which marginally employed	1.0	9,500
... of which fee basis	0.3	2,600
Sports, exercise & training operations	5.7	164,100
... thereof FTE	0.4	10,300
... of which marginally employed	1.7	49,300
... of which fee basis	2.8	81,300
Other areas (e.g. technology, maintenance, care)	1.8	30,550
... thereof FTE	0.2	3,700
... of which marginally employed	1.2	20,100
... of which fee basis	0.3	4,600

2.1.4.1.4 Personnel for specific tasks

Human resources play an essential role in sports clubs. In order to be able to guarantee a high quality of the club's offers, the training and further education of the club's employees is also a decisive factor. In this context, a third of the sports clubs state that a person in the club takes care of the training and further education of the paid and/or voluntary employees. Compared to the last survey, this proportion has decreased significantly (cf. Tab. 13). This has a direct impact on the human capital of sports clubs. Further studies show that there is a significantly positive effect of such a position on the willingness of coaches and trainers for further training and education and, thus, on the human capital of a club (Breuer, Feiler & Rossi, 2021b).

Somewhat more clubs, namely almost 36 %, also state that there is one person in the club who explicitly takes care of the further

development of the club offers. The proportion of clubs that have a person who takes care of the IT and digital infrastructure in the club is even higher. This applies to almost 62 % of the clubs (see Tab. 13).

Tab. 13: Personnel and their development (n.a.=not recorded 2017/2018).

	Share of clubs (in %)	clubs total	Index (2017=0)
Person available for training and further education of the club employees	33.3	29,300	-16.3***
Person available for the further development of the club's offers	35.9	31,600	n.a.
Person who takes care of the IT and digital infrastructure available	61.7	54,300	n.a.

2.1.4.2 Sports facilities

If you ask the sports clubs about the type of sports facilities they use, it shows that almost 70 % of the clubs or around 61,500 sports clubs in Germany use sports halls and around 54 % use outdoor facilities, such as sports fields. More than a quarter of the clubs also state that they use special sports facilities such as shooting ranges or jetties (cf. Tab. 14).

Tab. 14: Type of sports facilities used by sports clubs.

	Share of clubs (in %)	Clubs total
Outdoor facilities (e.g. sports fields)	53.9	47,500
Sports halls	69.8	61,500
Special sports facilities (e.g. shooting ranges, landing stages, etc.)	27.0	23,800

A good 42 % of sports clubs or around 37,250 clubs have their own facilities. Compared to 2017, this proportion has remained constant (see Tab. 15).

Tab. 15: Club-owned sports facilities.

	Share of clubs (in %)	Clubs total
Club-owned facilities	42.3	37,250

If one takes a closer look at what the sports clubs mean by club-owned facilities, i.e. whether they actually own the sports facilities or "only" are in possession of them, the following results, which reflect the rights of disposal of the sports facilities[15], provide information (whereby the here in part very complex property and contractual situation must be observed in individual cases).

Tab. 16: Clubs' rights of disposal to the club's own sports facilities.

	Yes, all club-owned facilities	Yes, part of the club's own facilities	No
	Share in clubs with club-owned facilities (in %)		
Facilities may be rented out by the club and the income from the rental may be kept.	53.7	17.5	28.8
Facilities may be changed by the club in terms of shape and appearance.	61.8	25.4	12.9
Facilities may be sold by the club and the proceeds from the sale may be kept.	18.7	8.5	72.8

While more than half of the clubs that use their own facilities state that they can rent out the facilities and keep the income, and even almost 62 % state that they can change the shape and ap-

15 The rights of disposal of a good relate to its use, the right to appropriation of the income from its use and the right to change it (cf. Erlei, Leschke & Sauerland, 2007).

pearance of the facilities, almost 73 % of the clubs with club-owned facilities state that they have no sales rights to the facilities (cf. Tab. 16). This indicates that almost three quarters of the clubs are not the sole owners of the complete sports facilities.

In addition to using the club's own facilities, 58.3 % or a total of almost 51,400 clubs also use municipal sports facilities (including school sports facilities). Normally, i.e. regardless of the Corona pandemic, around 28 % of all clubs have to pay fees for the use of municipal sports facilities. In relation to the clubs that use municipal facilities, this is almost half of these clubs, namely a total of around 24,900 clubs. Compared to 2017, both the proportion of clubs that use municipal facilities and the proportion of clubs that have to pay a usage fee for this have decreased (cf. Tab. 17).

Tab. 17: Use of municipal sports facilities and their development.

	Share of clubs (in %)	Clubs total	Index (2017=0)
Use of municipal sports facilities	58.3	51,350	-6.2***
of which normally payment of usage fees	48.5	24,900	-3.8**

Of the clubs that use municipal facilities and normally have to pay a usage fee, almost 30 % stated in 2020 that the non-use of sports facilities due to the COVID-19 pandemic had no impact on the usage fee for municipal sports facilities. However, almost 60 % of these clubs stated that no usage fee had to be paid for the period of non-use, and just over 11 % of these clubs only had to pay a reduced fee for the period of non-use.

In addition to using club-owned and municipal facilities, almost 18 % of sports clubs in Germany also use facilities from commercial providers. This share corresponds to around 15,600 clubs (cf. Table 18).

Table 18: Use of sports facilities from commercial providers.

	Share of clubs (in %)	Clubs total
Facility use from commercial providers	17.7	15,600

2.1.4.3 Finances

2.1.4.3.1 Membership fees

Half of all sports clubs require a monthly membership fee of up to € 4 for children, a maximum of € 5 for adolescents and a maximum of € 10 for adults (see Tab. 19).

Tab. 19: Monthly membership fees in sports clubs.

Monthly fee for	Median[16] (in €)	Median (in €) system perspective
Children	4.00	6.00
Adolescents	5.00	7.00
Adults	10.00	11.00

If one also considers the membership fees from the member-weighted system perspective (cf. Section 4.3.2.2), so that the results for the sports club members in Germany are representative instead of for the sports clubs, the median for all three groups is somewhat higher (cf. Tab. 19). This shows that the club members pay higher membership fees on average than the analysis of the club perspective suggests[17].

2.1.4.3.2 Revenue-expenditure account

The overall financial situation of sports clubs in Germany is reflected in the revenue-expenditure account, which is the result of subtracting total expenditure from total revenue. It shows that in

16 The median denotes the value below and above which 50 % of the distribution lies. It is less „prone to outliers" both up and down than the mean (average).

17 In addition, sport-specific differences are likely to occur, which, however, were not examined further at this point.

2019[18], i.e. before the Corona pandemic, a good 73 % of all sports clubs had at least a balanced revenue-expenditure account, which means that the expenses were covered by the revenue or the revenue was higher than expenditure. Compared to 2016[19], this share is stable (see Tab. 20).

Tab. 20: Revenue-expenditure account of sports clubs in 2019.

	Share of clubs (in %)	Clubs total
At least balanced revenue-expenditure account	73.3	64,600

2.1.4.3.3 Revenue

Sports clubs in Germany generated the highest revenue in 2019, i.e. before the Corona pandemic, from (1) membership fees, (2) donations, (3) subsidies from the district, city or municipality, (4) sports events and (5) course fees (see Tab. 21).

Compared to the previous survey period, there are only a few changes. The revenue from membership fees and course fees has increased significantly compared to 2016 (see Tab. 21).

Tab. 21: Revenue of the sports clubs in 2019 and their development.

Revenue from	Mean value (in €)	Index mean value (2016=0)	Proportion of clubs that have revenue (in %)
Membership fees	20,184	+6.7**	100.0
Donations	4.143		76.5
Subsidies from the district/city/ municipality	2,467		52.5
Sporting events (spectator income, etc.)	1,918		37.5
Course fees	1,871	+50.7***	19.7

18 Financial year before the survey.

19 Financial year before the last survey.

Revenue from	Mean value (in €)	Index mean value (2016=0)	Proportion of clubs that have revenue (in %)
Subsidies from sports organisations: confederations at regional or local level	1,643		50.1
Self-managed restaurant	1,606		15.1
Sales of food and beverages (e.g. at sports festivals, Christmas markets, etc.)	1,557		39.2
Advertising contracts from perimeter boards	1.206		19.7
Social events (e.g. club ball, carnival event)	1,061		27.5
Services for members for a fee (rent of space, halls, etc.)	994		10.8
Advertising contracts for jerseys, equipment	891		8.8
Rental/leasing services club-owned facilities	814		15.5
Reimbursements/subsidies from health insurance companies	612		5.0
Subsidies from the federal state	573		22.7
Raising of credit	531		1.9
Services for non-members for a fee (rent of space, halls, etc.)	524		10.9
Advertising contracts for displays/ads	471		10.1
Subsidies from sports organisations: federations	435		21.0
Business operations	427		0.8
Subsidies from the friends‘ associations	322		6.6
Asset management (e.g. interest income)	242		8.9

Revenue from	Mean value (in €)	Index mean value (2016=0)	Proportion of clubs that have revenue (in %)
Admission fees	238		27.9
Services for cooperation partners for a fee/remuneration	195		3.4
Sale of sportswear and sports or fan articles (e.g. merchandising)	150		7.2
Subsidies from other funding programmes (e.g. employment office)	93		2.4
Advertising contracts for broadcast rights	53		0.3
Tombolas (e.g. lottery ticket sales)	52		7.0
Waste material collections (e.g. waste paper)	49		3.1
Subsidies from European funds (e.g. EU structural funds, Erasmus+ for education, youth and sport)	40		0.9
Other[20]	1,933		10.4

2.1.4.3.4 Expenditure

If you look at the spending of sports clubs in 2019, broken down into individual expenditure categories, it shows that clubs in Germany spend the most on average for (1) coaches, trainers and sports teachers, followed by (2) spending on maintenance and the operation of own facilities, (3) expenses for sports equipment and sports clothing, (4) administrative staff and (5) rents and reimbursement of costs for the use of non-club owned sports facilities (cf. Tab. 22). As in previous years, it can be seen that sports clubs continue to incur

20 Among other things, revenue from performances and events, reimbursements for work not performed, repayments (e.g., insurance) and photovoltaics (electricity generation) were mentioned.

the highest average expenditure for the core sporting operations of the clubs.

Compared to 2016, there have been significant increases in personnel costs for coaches and trainers as well as in expenses for insurance and accruals (cf. Tab. 22).

Tab. 22: Expenditures of sports clubs in 2019 and their development.

Expenses for	Mean value (in €)	Index mean value (2016=0)	Share of clubs that have expenses (in %)
Coaches, trainers, sports teachers	9,029	+8.4*	60.4
Maintenance and operation of own facilities	5,457		50.1
Sports equipment and sportswear	2,734		62.9
Administrative staff	2,547		11.9
Rental and reimbursement of costs for the use of non-club sports facilities	2,340		46.0
Purchase of goods	2,020		43.6
Implementation of own sport events	1,344		40.8
Maintenance staff, groundskeepers, etc.	1,268		19.3
Travel expenses for training and competitions	1,241		33.1
Fees to sports organisations: federations	1,194		73.6
Debt service (interest, repayments)	1,189		14.5
Payments to athletes	1,120		5.0
Insurances	1,089	+11.0*	75.8

Expenses for	Mean value (in €)	Index mean value (2016=0)	Share of clubs that have expenses (in %)
Fees to sports organisations: confederations at regional and local level	1,070		74.5
Accruals	1,042	+43.9*	16.3
Non-sporting events (e.g. festivals)	955		48.3
General administrative costs	950		54.8
Taxes of all kinds	944		29.4
Entry fees/registration fees	608		54.3
Referee/official expenses	520		27.5
Tax consultant, auditor, notary; Entries in the register of clubs	418		31.0
Honours/gifts/anniversaries (e.g. certificates, trophies, badges of honour, etc.)	346		63.5
Game Permissions/Passports/ Licenses	280		41.2
Advertising/promotional measures	273		21.2
Fines/penalties	74		19.0
Gema fees	68		25.4
Tombolas (e.g. lottery, tickets, prizes, etc.)	34		7.5
Miscellaneous[21]	1,876		12.7

2.1.4.3.5 Assets and debts

In addition to revenue and expenditure, the eighth wave of the Sport Development Report also asked the clubs about the amount of their

21 Among other things, construction costs, expenses for training and further education, the vehicle fleet, animal husbandry costs and costs for the homepage or internet presence were mentioned.

assets and their debts at the end of 2019[22]. On average, sports clubs in Germany had assets worth around € 91,400 (median = €11,600) on this date, while the average level of debt was around € 16,100 (median = €0) (see Tab. 23).

Tab. 23: Total assets and debt at the end of 2019.

	Mean (in €)	Median (in €)
Assets	91,360	11,580
Debt	16,100	0

2.1.4.3.6 Investments

The amount of material goods and services procured, i.e. the investments made by the clubs in the 2019 financial year, was around € 7,500 on average. However, half of the clubs only invested a maximum of € 250 in the year before the pandemic (see Tab. 24).

Tab. 24: Amount of material goods and services procured in the 2019 budget year.

	Mean (in €)	Median (in €)
Investments	7,510	250

2.1.4.3.7 Reserves

In order to be able to make future investments or carry out repairs, for example, sports clubs can build up reserves to a limited extent. In the 2019 financial year, the free reserves of the clubs averaged around € 8,700, while the earmarked reserves were around € 7,200. However, half of the clubs had built up significantly fewer reserves, in particular in relation to the earmarked reserves (cf. Tab. 25).

22 The clubs were asked to state the totals listed there if they kept an inventory in accordance with Section 260 of the German Civil Code. A total of 18.7 % of the clubs stated that they kept an inventory.

Tab. 25: Amount of free reserves and earmarked reserves in 2019.

	Mean (in €)	Median (in €)
Free reserves	8,740	1,500
Earmarked Reserves	7,220	0

2.1.4.4 Digitalization

For the first time, the subject of digitalization was included in the club survey as part of the Sport Development Report. For this purpose, two sets of questions were developed on the basis of existing literature in the field of digitalization in non-profit organisations (cf. Dufft et al., 2017) and scales for recording the organisational degree of digitalization (Müller et al., 2018). The first question battery presents the clubs' assessment of the topic of digitalization (cf. Fig. 7 and Fig. 8) and the second reflects the degree of use of digital media by the clubs (cf. Fig. 9 to Fig. 11).

First, the clubs were asked to give their assessment of the extent to which various statements on the topic of digitalization apply in their club. A 5-point scale from 1="does not apply at all" to 5="fully applies" was used. Regardless of the size of the club, a lack of resources (time, staff, money) is the biggest hurdle to driving digitalization forward (M=2.95). Initial investments in technologies are sometimes difficult for the clubs to shoulder, and this applies in particular to very small clubs with up to 100 members. Furthermore, the smallest clubs, in particular, see the limits of digitalization and therefore make a conscious decision to remain analogue. However, there are significant differences between the club sizes in this assessment. The agreement with this item decreases as the size of the club increases, i.e. larger sports clubs tend to refrain from remaining analogous. A similar picture emerges when one asks about the relevance of digitalization for the club. This is less the case in smaller sports clubs than in large ones. Likewise, smaller clubs see rather unmanageable risks of digitalization. However, there are no differ-

ences depending on the size of the club when assessing whether the club lacks the necessary technical skills to advance digitalization. Here the mean is at *M*=2.51 (see Fig. 7).

If you also look at the distribution of the clubs' assessment of digitalization , it shows that almost 40 % of the clubs lack the necessary resources to drive digitalization forward. On the other hand,

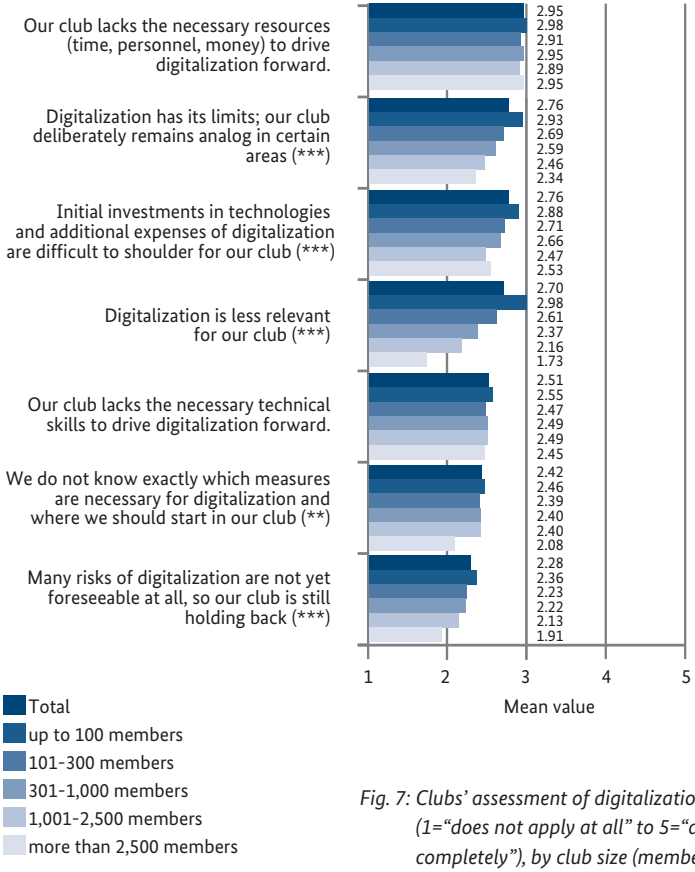

Fig. 7: Clubs' assessment of digitalization (1="does not apply at all" to 5="applies completely"), by club size (members).

this does not apply to a similarly high proportion of clubs. More than 60 % of the clubs (rather) do not see the risks of digitalization. In addition, more than half of the clubs state that there is neither a lack of technical skills to advance digitalization nor that the clubs do not know where to start with digitalization (see Fig. 8). Overall, the clubs, therefore, tend to be open to digitalization measures, even if there are still some differences between smaller and larger sports clubs.

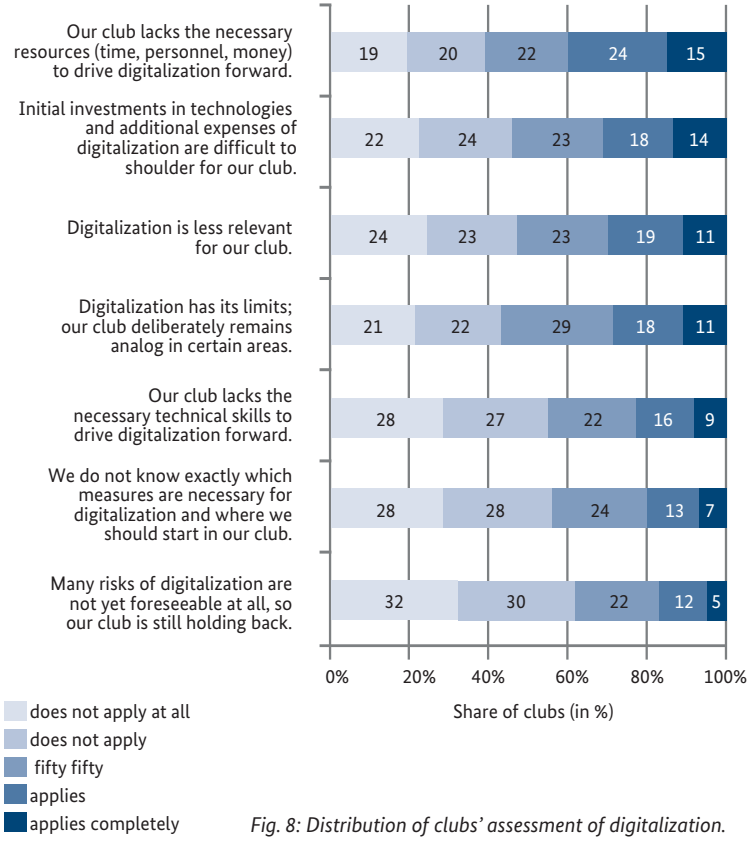

Fig. 8: Distribution of clubs' assessment of digitalization.

In addition to the assessment of the clubs on the topic of digitalization in general, the clubs were also asked about the use of different digital media. Here, too, a 5-point scale (1 = "does not apply at all" to 5 = "fully applies") was used.

The clubs stated most frequently that they rely on digital communication (WhatsApp, e-mail, helper app) with the volunteers (*M*=4.18) and members (*M*=4.15). However, there were significant differences based on club size. This form of communication seems to be more pronounced in smaller and medium-sized clubs in particular. A reversed picture emerges in the case of digital membership management, digital financial accounting and the use of social media for marketing activities and public relations work by the clubs. These digital measures are used significantly less frequently in small clubs with up to 100 members than in all larger clubs. These forms of use are most common in large clubs with 1,001 to 2,500 members. Digital communication with external organisations and partners, such as federations or schools, is used to a similar extent in clubs of all sizes (see Fig. 9).

There are also differences in terms of club size in other areas of the use of digital media by sports clubs. For example, the planning and organisation of courses, especially in large clubs with more than 2,500 members, is carried out digitally (e.g. with the help of the homepage or a club app). This also applies to the digital occupancy planning of sports facilities and digital support in the planning and implementation of events (see Fig. 10).

Clubs rely least heavily on digital fundraising channels to generate additional income. Almost two-thirds of the clubs state that they do not use this option at all (see Fig. 11). If it is used, then most likely again by large sports clubs and least often by small clubs (see Fig. 10). In the event of financial problems, there should still be potential to generate additional income.

As far as the use of digital sports offers is concerned during the interruption of sports operations due to the COVID-19 pandemic, dig-

ital replacement offers (at the time of the survey in autumn 2020) were still rarely used on average. 61 % of the clubs stated that they had not made any digital replacement offers, while around 15 % of the clubs stated that this was completely or somewhat correct. A further 12 % of the clubs offered digital alternatives (see Fig. 11). Here, too, there are

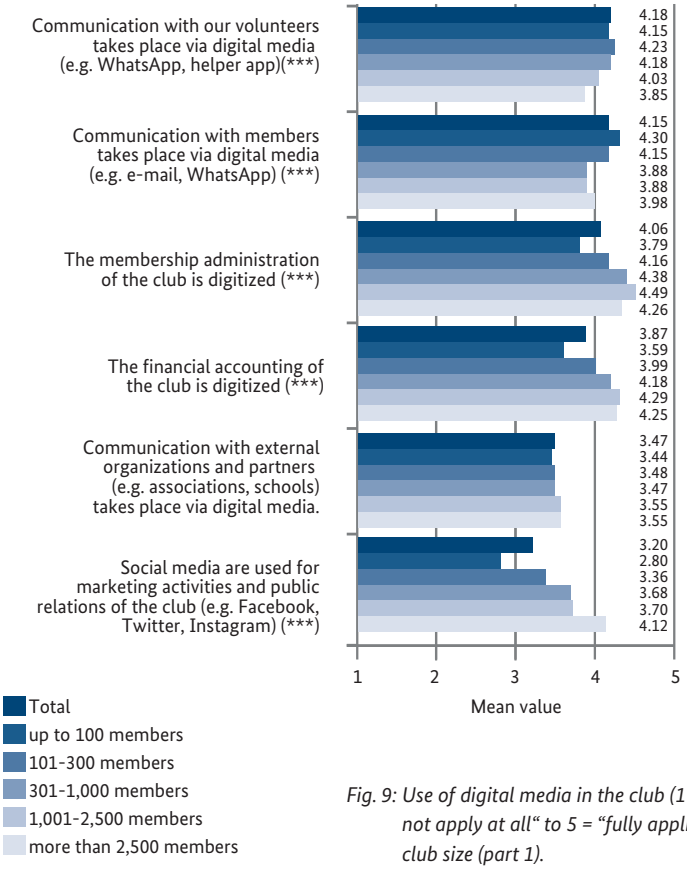

Fig. 9: Use of digital media in the club (1 = "does not apply at all" to 5 = "fully applies"), by club size (part 1).

clear differences based on club size. The mean value of approval for large sports clubs with more than 2,500 members, at *M*=3.86, is well above the overall average (*M*=1.89). Large and very large clubs, in particular, were, therefore, able to access digital offers for their members during the suspension of sports operations (see Fig. 10).

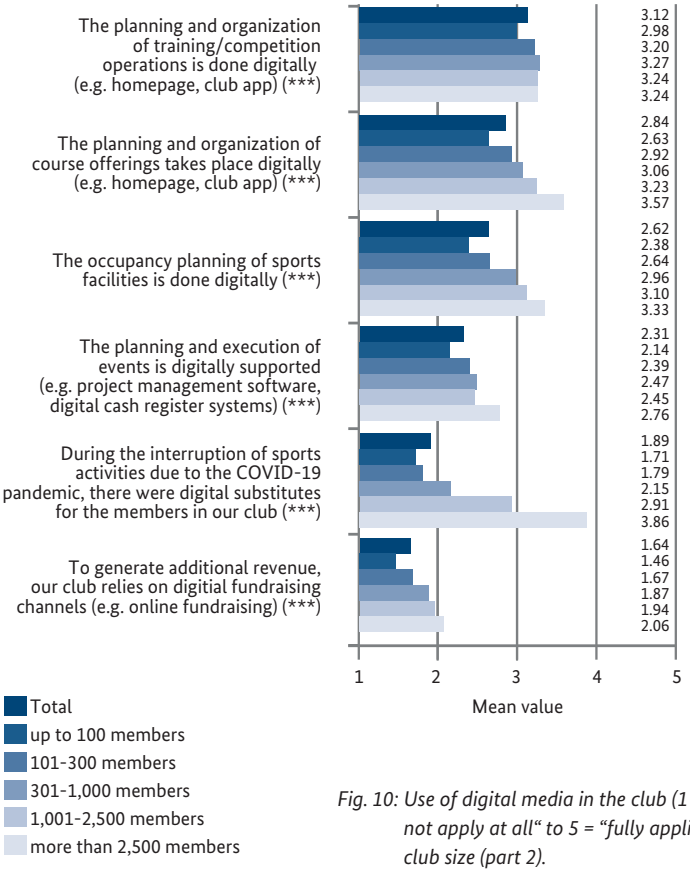

Fig. 10: Use of digital media in the club (1 = "does not apply at all" to 5 = "fully applies"), by club size (part 2).

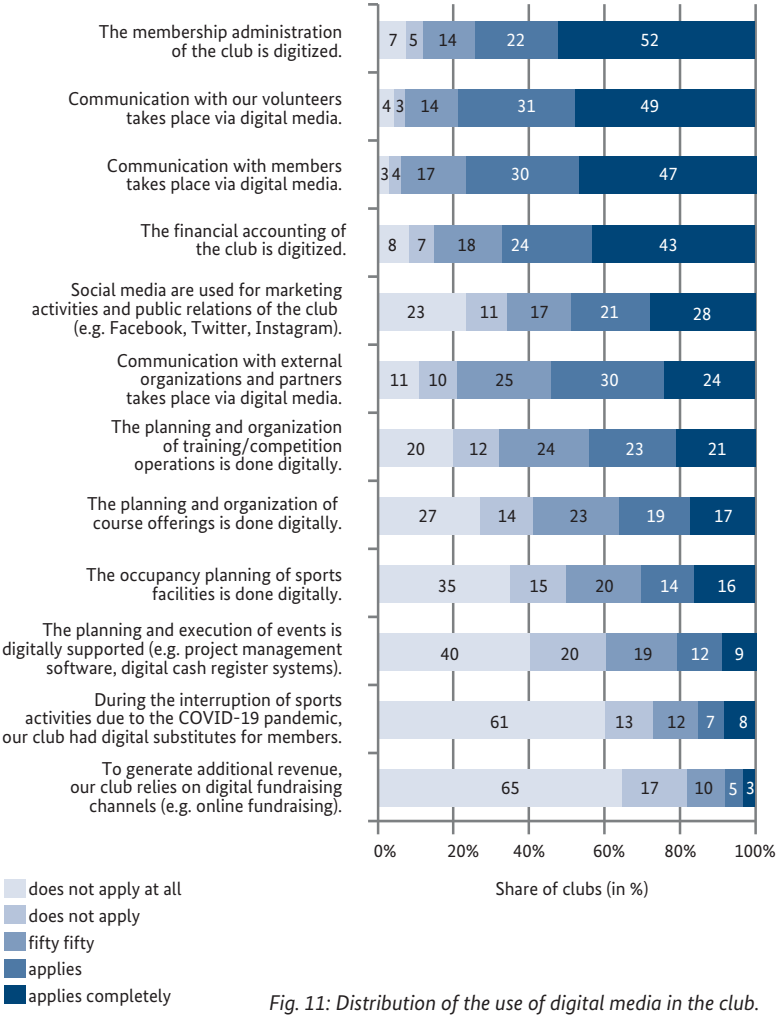

Fig. 11: Distribution of the use of digital media in the club.

2.1.5 Democracy function

In many sports clubs, there are specific opportunities for young people under the age of 18 to participate or actively help shape club life. For this reason, sports clubs are often referred to as "schools of democracy" for young people. From this, it follows that with more extensive participation opportunities for young people in the clubs, the public interest function of the clubs also increases. Various forms of participation for young people are possible in sports clubs in Germany. For example, almost a third of the sports clubs have youth representatives or youth wardens or officers with a seat on the entire board. However, this proportion has decreased significantly compared to 2013[23] (cf. Tab. 26).

Furthermore, young people have voting rights in the general assembly in almost 27 % of the clubs. This corresponds to around 23,700 clubs, which is a significant increase compared to 2013. In almost 23 % of the clubs, a youth representative is elected by the young people and in a good 18 % of the clubs there is an election of a young person as a youth spokesperson. Furthermore, around 14 % of the sports clubs have their own youth boards or youth committees, and in 7.5 % of the clubs, youth representatives can be elected at the department level. In 6.8 % of the clubs, there are also other opportunities for youth participation. However, in around 45 % of the clubs, there are no specific opportunities for youth participation. The proportion of these clubs has increased significantly compared to 2013 (cf. Tab. 26).

23 The participation opportunities for young people were last surveyed in the fifth wave of the Sport Development Report (2013/2014).

Tab. 26: Participation opportunities and positions for young people (under 18) in the clubs (share of clubs in %) and their development since 2013.

	Share of clubs (in %)	Clubs total	Index (2013=0)
Youth representative/youth warden/youth officer with a seat on the entire board	31.9	28,100	-10.5***
Voting rights of young people in the general assembly	26.9	23,700	+7.1*
Election of the youth representative by the young people	22.7	20,000	
Election of a young person as youth spokesperson	18.4	16,200	
Own youth board or youth committee	13.9	12,200	
Election of youth representatives at department level by young people	7.5	6,600	
Other possibility of youth participation	6.8	6,000	
None of these offices or participation opportunities	45.3	39,900	+26.5***

2.2 Support possibilities and needs

2.2.1 General problems

At the time of the survey in the autumn of 2020, sports clubs in Germany were faced with various challenges. The focus here was still on personnel problems. Retaining and recruiting volunteer officials, young competitive athletes, as well as coaches and trainers, continue to represent the biggest problems for the clubs on average. In addition, compared to the survey three years earlier, the clubs are struggling more with retaining and recruiting members. This problem, as well as the retention and recruitment of young competitive athletes, has increased significantly compared to 2017 (see Fig. 12).

In addition, bureaucratic hurdles such as the number of laws, ordinances and regulations continue to pose growing challenges for clubs, while at the same time, the (lack of) support from politics and administration is a constant major problem. While around 30 % of the clubs consider the latter problem to be big or very big, this applies to the problem of the number of laws, ordinances and regulations for around 38 % of the clubs (see Fig. 13). Here, the perceived problem pressure has increased by 12.6 % (see Fig. 12).

A significantly greater problem pressure compared to the survey in 2017 is also evident in the following areas: Availability of sports facilities (+11.9 %), Internet and social media skills (+11.6 %), Cooperation with kindergartens (+10.1 %), cooperation with schools (+7.8 %), qualification of the coaches and trainers (+5.2 %), clarity about the strategy and future development of the club (+4.1 %) as well as qualification of the volunteers officials (+3.6 %). On the other hand, the perceived problem pressure has decreased within the last three years with regard to the financial situation of the club (-2.4 %) and with regard to recruiting volunteers for sporadic assignments (-2.3 %; see Fig. 12). The latter is likely to be due in particular to event restrictions in the wake of the pandemic.

In addition, more than 60 % of the clubs have no or only a very small problem in the areas of sports facilities, financial situation, the commitment of volunteers, the organisation of division of labour and responsibilities in the club as well as in relation to the clarity of a strategy and the future development of the club (see Fig. 13).

2.2.2 Existential problems

In 2020, it was evident that there is an increasing number of clubs that have at least one existential problem. In autumn 2020, this applied to 42.7 % of all sports clubs nationwide or a total of around 37,600 clubs in Germany. Compared to the survey in 2017, the proportion of clubs with at least one existential problem has increased significantly (+16.2 %).

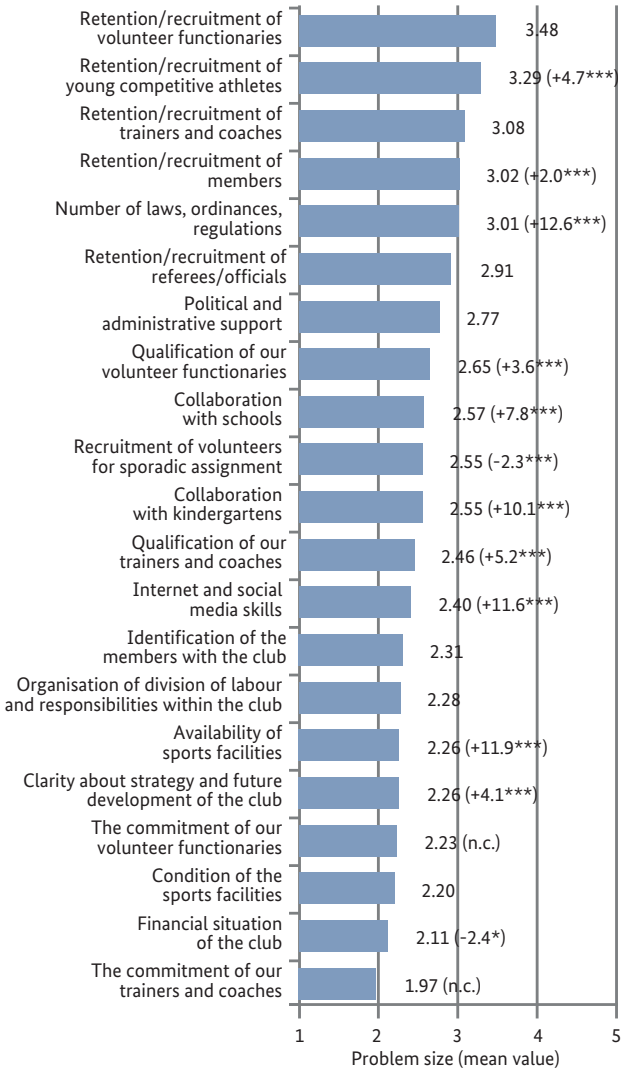

Fig. 12: Club problems, sorted by size, and their development (1= "no problem", 5 ="a very big problem"; index in brackets: 2017=0; n.c.=not covered 2017/2018).

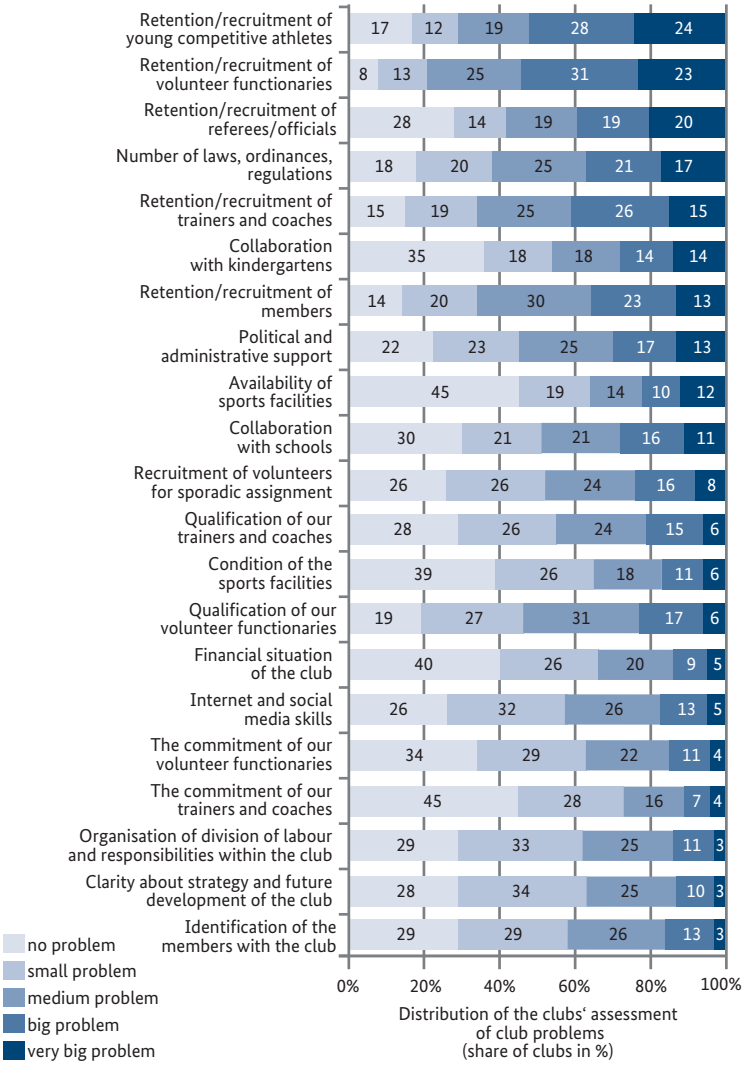

Fig. 13: Distribution of the assessment of the clubs regarding the problems

By far the biggest existential problem was still the retention or recruitment of volunteer functionaries: 14.6 % of the clubs felt their existence threatened by this problem in the autumn of 2020. Compared to 2017, this proportion has remained constant. In addition, the retention or recruitment of members represented a threat to the existence of almost every tenth club, which has also increased significantly over the past three years (+25 %).

Almost 9 % of sports clubs, and thus significantly more than three years ago, also felt an existential threat in the autumn of 2020 due to the number of laws, ordinances and regulations. The clubs also felt growing existential problems due to the retention and recruitment of coaches and trainers, the availability of sports facilities and a lack of support from politics and administration. Proportionately fewer, but still significantly more clubs than in 2017 also saw an existential threat in the qualification of coaches and trainers as well as in the area of internet and social media skills (see Fig. 14).

In addition, the „member-weighted system perspective“ introduced in the sixth wave is considered (see Fig. 15). This shows the extent to which sports club members are affected by existential problems. For this purpose, the clubs were weighted according to their membership size in relation to the average of all clubs, so that the results are representative for the sports club members in Germany instead of for the sports clubs (cf. Section 4.3.2.2).

The findings for the member-weighted system perspective mostly deviate only slightly from the findings presented above. Overall, however, it is noticeable that the club members are less often affected by existential problems than the results of the classic club evaluation suggest. 35.2 % of club members are organized in clubs that have at least one existential problem (compared to 42.7 % according to the “classic” club perspective).

Explicitly, significantly fewer members are organized in clubs that have existential problems due to the financial situation of the respective club (2.9 %) than for clubs on average the financial

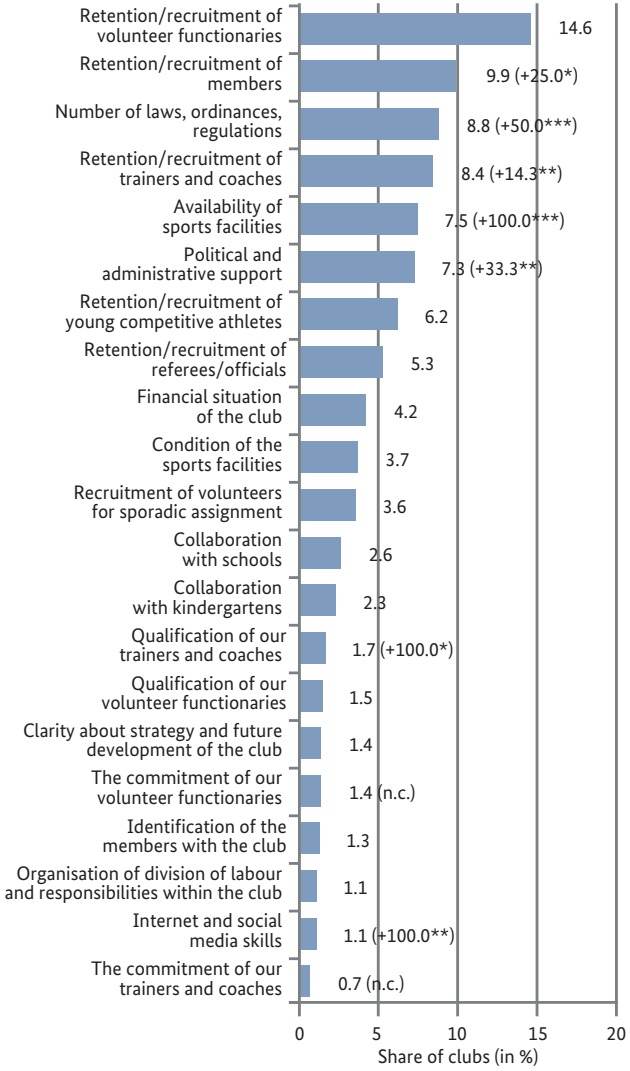

Fig. 14: Share of sports clubs with problems threatening their existence and their development (in %; in brackets index: 2017=0; n.c.=not covered 2017/2018).

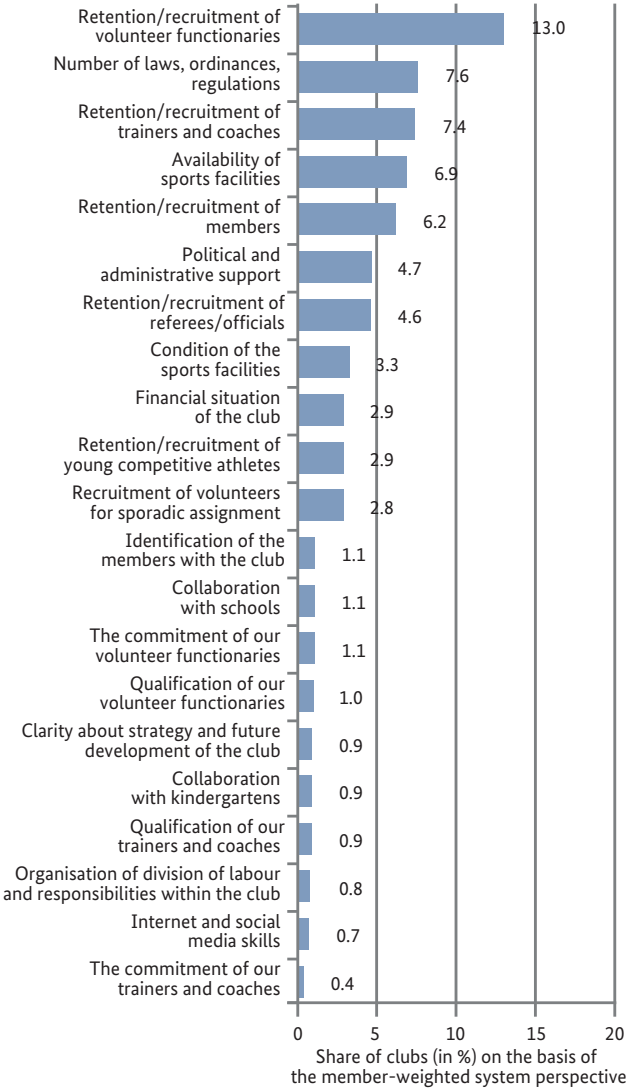

Fig. 15: Existential problems based on the member-weighted system perspective.

situation of the club is existentially threatening (4.2 %). There are also fewer members in clubs that have existential problems due to a lack of support from politics and administration (4.7 %) than is the case for clubs on average (7.3 %). Also by problems with regard to retaining and recruiting members (6.2 % vs. 9.9 %), young competitive athletes (2.9 % vs. 6.2 %) and honorary officials (13 % vs. 14.6 %) are fewer members affected than the club's perspective would suggest. This also applies to problems of cooperation with schools (1.1 % vs. 2.6 %) and kindergartens (0.9 % vs. 2.3 %) (see Fig. 14 and Fig. 15).

2.2.3 Problems due to the COVID-19 pandemic

In addition to the general problems, sports clubs in Germany are primarily struggling with the effects and restrictions of the COVID-19 pandemic. In this context, the clubs were explicitly asked about problems caused by the COVID-19 pandemic. For this purpose, the probability of having existential problems due to the COVID-19 pandemic within the next 12 months (from the time of the survey in autumn 2020) was asked, namely in the areas of the financial situation as well as the retention and recruitment of volunteers and members. A percentage of zero means that an existential threat is perceived as not at all likely, while a percentage of 100 means that the potential threat is extremely likely[24].

The clubs gave an average of almost 21 % probability that they would have existential problems in the area of the financial situation in the following year. The probability that existential problems will arise when retaining and recruiting volunteers (29.4 %) and retaining and recruiting members (34.2 %) was estimated to be even greater. There are significant differences between clubs that

24 The question is based on a question in a special survey by the Socio-Economic Panel (SOEP) on the subject of COVID-19 in 2020. The question in the SOEP addressed people's assessment of the subjective likelihood of having a life-threatening illness within the next 12 months to suffer from COVID-19 disease (cf. Hertwig et al., 2020).

took part in the survey before the start of the second lockdown and clubs that took part in the second lockdown (from November 2nd, 2020). If clubs took part in the second lockdown, the probability of existential problems occurring in all three areas was estimated to be significantly higher (cf. Tab. 27).

Tab. 27: Probability of existential problems due to COVID-19 in the following year of the survey (starting point autumn 2020).

Probability of existential problems in the area of...	mean total	Participation before the 2nd lockdown	Participation in the 2nd lockdown	sig.
financial situation	20.8	20.0	21.2	0.014*
retaining/recruiting volunteers	29.4	28.2	30.1	0.000***
retaining/recruiting members	34.2	31.9	35.5	0.000***

Further analyzes have also shown that various structural characteristics and the organisational capacity of the clubs significantly influence the clubs‘ assessment of possible existential problems caused by COVID-19. For example, clubs that have paid staff and their own sports facilities feel more likely to have financial difficulties (cf. Feiler & Breuer, 2021).

Overall, it can be stated that the clubs assessed a possible threat to their existence due to the financial situation to be comparatively lower than in the areas of retaining and recruiting volunteers and especially members. Around 42 % of the clubs stated that they would rate the probability of an existential emergency triggered by the pandemic as zero in terms of their financial situation. 32 % of the clubs saw no threat at all from the pandemic in the following year for the area of retaining and recruiting volunteers, while this applied to almost a quarter of the clubs for retaining and recruiting members. On the other hand, around 5 % of the clubs considered a threat to their existence due to the pandemic in the area of member retention and recruitment to be absolutely probable (see Fig. 16).

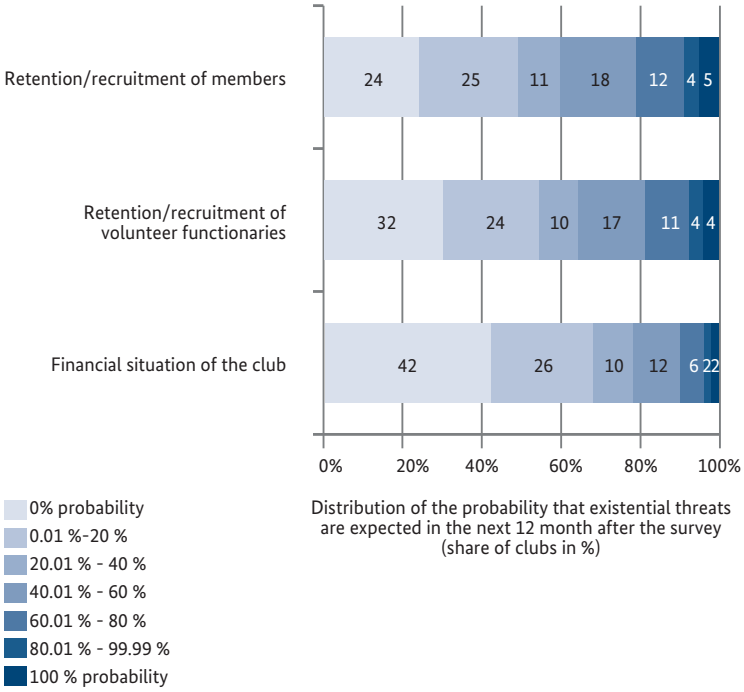

Fig. 16: Distribution of the probability that in the year following the survey due to the pandemic, problems threatening the existence of the respective areas are expected (share of clubs in %).

3 Individuals

3.1 Members

3.1.1 Satisfaction

All in all, the members of the sports clubs in Germany were quite satisfied in the spring of 2021. On a scale from 0 ="not at all satisfied" to 10 ="extremely satisfied", the average satisfaction of the members with their club was *M*=8.19. This was surpassed by the satisfaction of the members with the sports they mainly practice (*M*=8.50). It also shows that the range of sports on offer was able to meet the expectations of the members to a large extent (*M*=8.47). This result is matched by the high probability of wanting to recommend the club (*M*=8.67) and that so far only a few members have toyed with the idea of leaving the club (*M*=1.85; see Tab. 28).

Tab. 28: General satisfaction of the members.

Item	Scale	Mean
General satisfaction with the club	0=not at all satisfied 10=extremely satisfied	8.19
General satisfaction with the mainly used sports offer	0=not at all satisfied 10=extremely satisfied	8.50
Fulfillment of the expectations of the mainly used sports offer	0=not fulfilled at all 10=extremely fulfilled	8.47
Probability of recommending the club	0=unlikely 10=extremely likely	8.67
Considerations to end the membership in the club	0=never 10=very often	1.85

If one considers not only the general satisfaction but also the satisfaction of the members surveyed with individual aspects of the sports they mainly use, it shows that the members are particularly satisfied with the competence and motivation of the coaches and trainers. In addition, there is a high level of satisfaction with the transport connections and parking space situation. On average, the

members are also very satisfied with the motivation of the other participants, the provision of sports material and sports equipment and the condition of the sports facilities used. Satisfaction with the condition of the sanitary facilities and changing rooms is slightly lower on average (see Fig. 17).

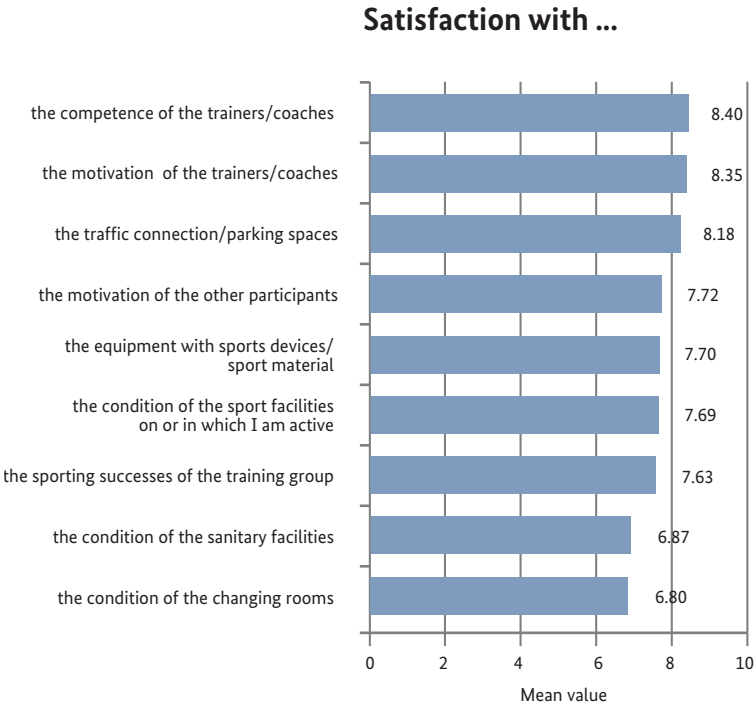

Fig. 17: Members' satisfaction with individual aspects of the sports they mainly use (0 ="not at all satisfied" to 10 ="extremely satisfied").

A supplementary consideration of member satisfaction with individual aspects of the club shows that the members were particularly satisfied with the value for money and the membership fee

(see Fig. 18). This result underscores the fact that sports clubs are also seen by their members as providers of sports and club offerings with fair prices.

In addition, the satisfaction of the members with the competence and motivation of the club's board is very pronounced. The members are also very satisfied with the organisation of the club's operations, the variety of sports on offer and the clear responsibilities in the club. In particular, the satisfaction of the members with the crisis management of the clubs during the Corona pandemic is also very pronounced on average (see Fig. 18). A good third of the members gave the highest possible value of 10 on the satisfaction scale, while only a good 2 % of the members were not at all satisfied with the crisis management.

On average, the least pronounced was satisfaction with the handling of possible conflicts in the club and the willingness of the members to get involved. However, it is also evident that these aspects were rated rather positively on average (cf. Fig. 18).

3.1.2 Identification with the club

In addition to their core function of doing sports together, sports clubs also offer places for social exchange and community. This exchange can promote and strengthen the feeling of connection between the members and their club. In this context, the members were asked as part of the eighth wave of the Sport Development Report to what extent they identify with their club. For this purpose, six items were asked on a scale from 1 = "do not agree at all" to 5 = "fully agree".

It turns out that the members identified themselves moderately to strongly with their club on average. The strongest agreement was found in the way in which members talk about their club, namely tending to use the "we" form (M= 4.09). The members also tend to perceive praise for the club as a personal compliment

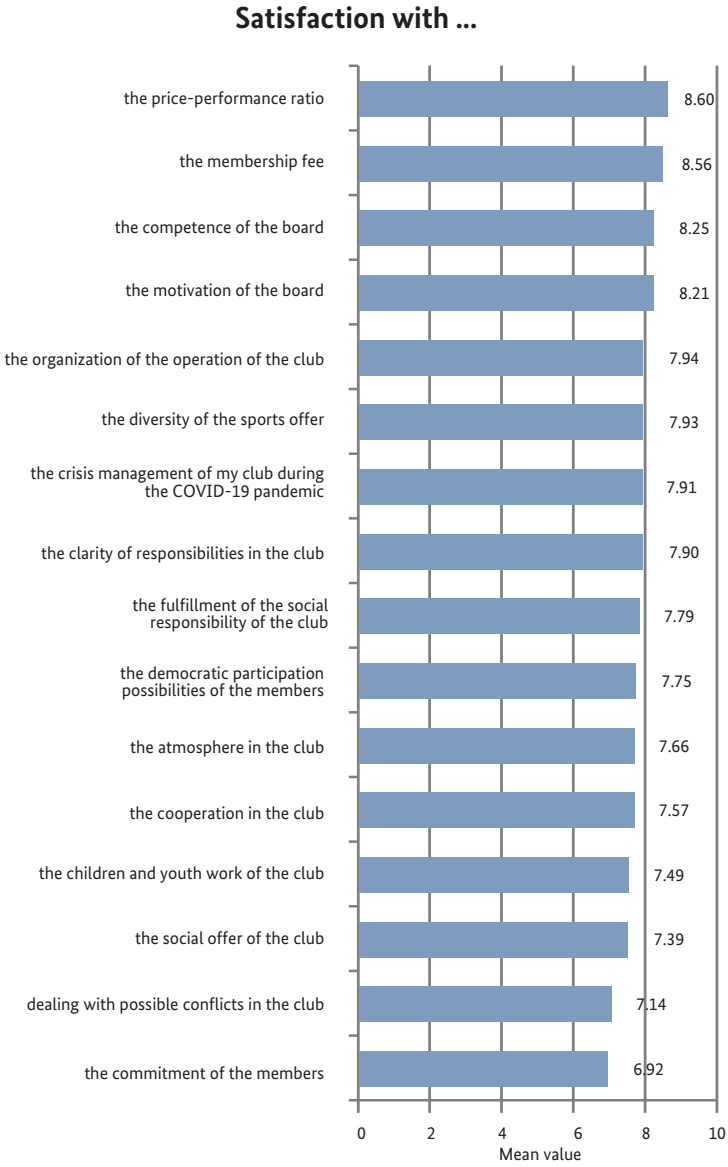

Fig. 18: Members' satisfaction with individual aspects of the club (0="not at all satisfied" to 10="extremely satisfied").

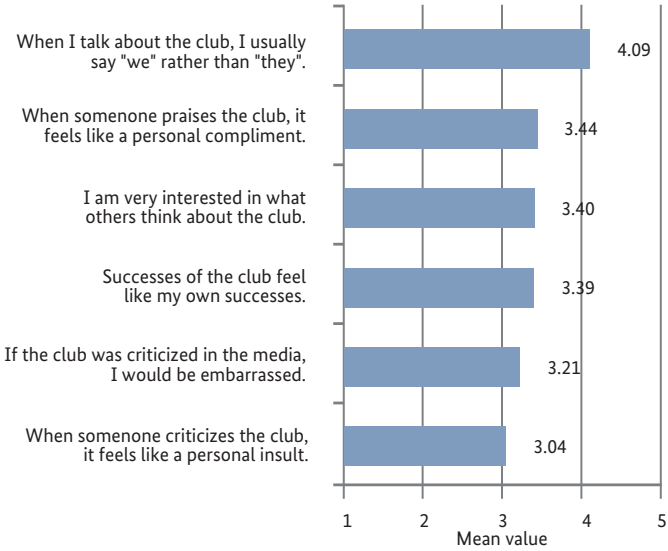

Fig. 19: Identification of the members with the club (1 = "do not agree at all" to 5 = "fully agree").

(*M*=3.44) and successes of the club feel like one's own successes (*M*=3.39). In addition, there is great interest in what other people think about the club (*M*=3.40). Members feel least personally affected when the club is criticized (see Fig. 19).

3.1.3 Future plans

The members of the sports clubs in Germany were also asked what their plans for the future are in relation to their club (scale: 1="do not agree at all" to 5="fully agree"). It shows that at the time of the survey in the spring of 2021, the majority of club members were planning to continue their membership both in the current year (*M*=4.76) and in the coming year (*M*=4.68). The agreement to be a member of the club in the medium term, i.e. in three years, is some-

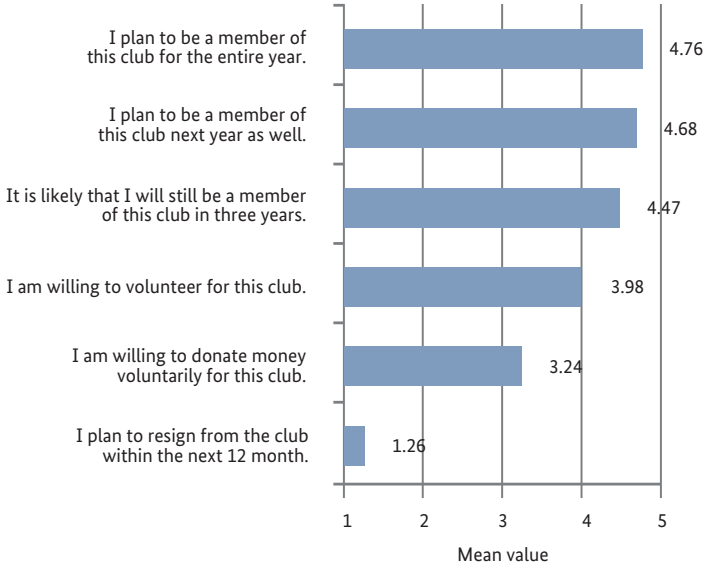

Fig. 20: Future plans of the members of the club (1="do not agree at all" to 5="fully agree").

what less pronounced (*M*=4.47). This relatively high level of loyalty to the club is consistent with the fact that there is little intention on the part of the members to leave the club within the next 12 months (*M*=1.26; cf. Fig. 20).

The willingness of members to volunteer for the club is somewhat lower but still very high on average (*M*=3.98), while the willingness to donate to the club is somewhat less pronounced on average (*M*=3.24; see Fig. 20).

3.2 Referees

3.2.1 Satisfaction

All in all, the referees were also very satisfied with their work on average. The referees surveyed indicated their general satisfaction with the job on a scale from 0="not at all satisfied" to 10="extremely satisfied" with *M*=7.93. The probability of recommending the referee or referee work to friends and/or colleagues was also relatively high (*M*=7.23). On the other hand, fewer referees tended to toy with the idea of ending their activity (cf. Tab. 29). More than a quarter of the referees stated that they had never had such a thought.

Tab. 29: Referee's satisfaction with their activity.

Item	Scale	Mean
General satisfaction with referee work	0=not at all satisfied 10=extremely satisfied	7.93
Probability of recommending referee activity	0=unlikely 10=extremely likely	7.23
Considerations to end the referee activity	0=never 10=very often	3.36

If, in addition to the general satisfaction, the satisfaction of the referees surveyed with individual aspects of the activity is considered (cf. Fig. 21 and Fig. 22), the highest satisfaction values are shown on an eleven-point scale for their own performance as a referee (*M*=7.82), cooperation with other referees (*M*=7.59), recognition of the work by family and friends (*M*=7.57), respect of the athletes for the referees (*M*=7.31) as well as the recognition of the activity by the members of their own club (*M*=7.16; cf. Fig. 21).

On the other hand, the average satisfaction is lower with the recognition of the activity in the form of certificates (*M*=5.33), the condition of the referee rooms (*M*=5.33), the openness to criticism

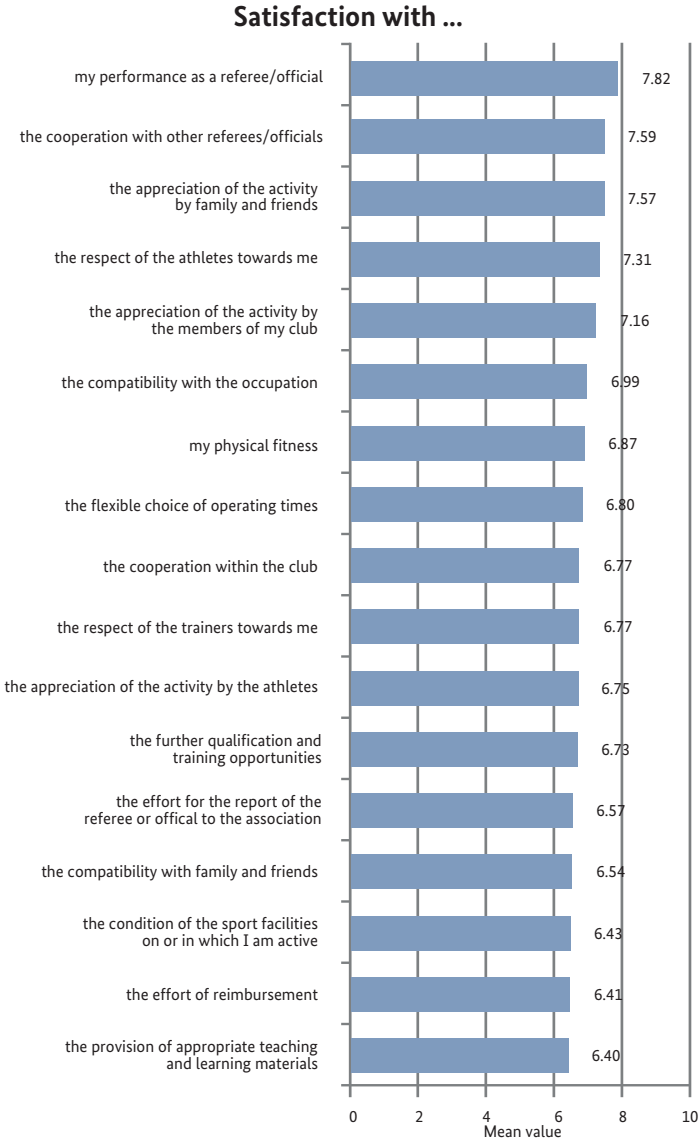

Fig. 21: Referee's satisfaction with individual aspects of the activity (0 = "not at all satisfied" to 10 ="extremely satisfied"; part 1).

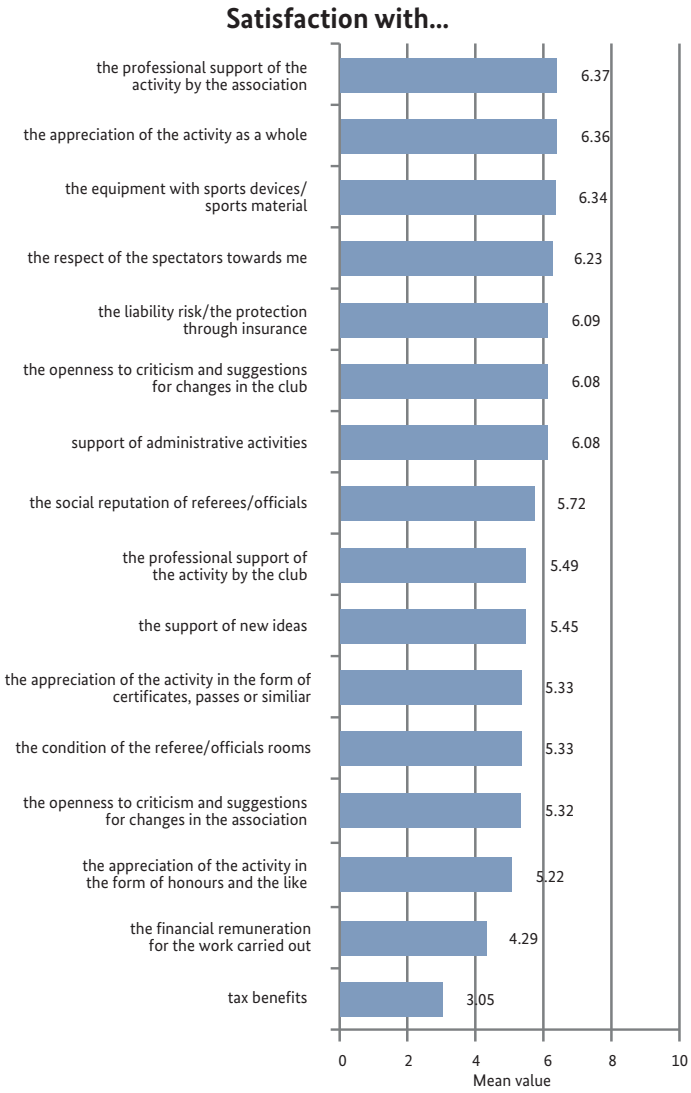

Fig. 22: Referee's satisfaction with individual aspects of the activity (0 = "not at all satisfied" to 10 = "extremely satisfied"; part 2).

and suggestions for change in the federation (*M*=5.32) and recognition in the form of honours and the like (*M*=5.22; cf. Fig. 22).

On average, the referees surveyed are rather dissatisfied with the financial remuneration for the work they have done (*M*=4.29) and tax benefits (*M*=3.05; see Fig. 22). A similar picture had already emerged among the coaches and trainers as well as the board members (cf. Breuer & Feiler, 2019).

3.2.2 Motivation

If you ask the referees about the reasons for their commitment, a variety of motives emerge. On a seven-point scale (from 1="do not agree at all" to 7="fully agree"), most referees agree on average to do the job because they enjoy it and because of their connection to the sport (cf Fig. 23). The „fun motive" was also the top priority for the coaches and trainers (cf. Breuer & Feiler, 2019).

The referees also stated that they do the job because they feel good about it and would like to do something useful in their free time. The general joy of being involved also plays an important role, as does the fun of helping others (see Fig. 23).

On the other hand, the personal environment, i.e. family and friends, in particular, is, on average, somewhat less relevant for the motivation of the referees, just as little as aspects of recognition and social standing. The referees seldom gave material aspects such as money, reduced fees or the provision of sports clothing as reasons for carrying out their work (cf. Fig. 24). A similar pattern had already emerged among the coaches and trainers as well as board members (cf. Breuer & Feiler, 2019).

3.2.3 Future plans

Similar to the members, the referees were also asked about their future plans, in this case related to their activity. Here, too, the approv-

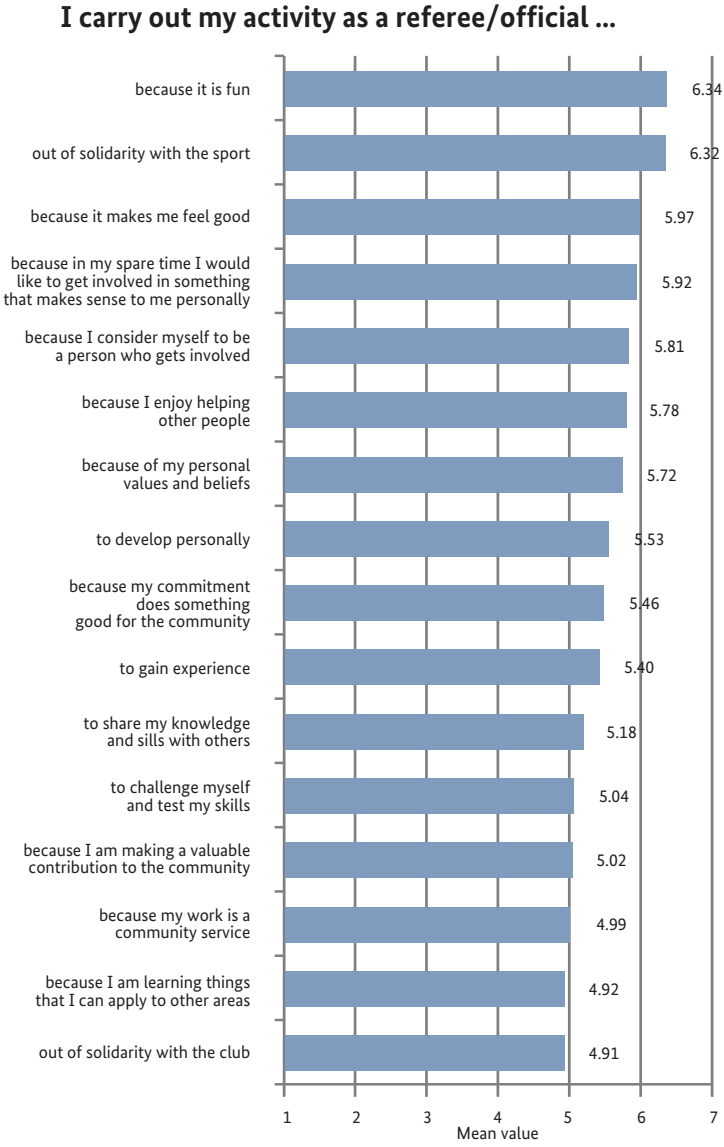

Fig. 23: Motives of the referees for carrying out their activity (1 = "do not agree at all" to 7 = "fully agree"; part 1).

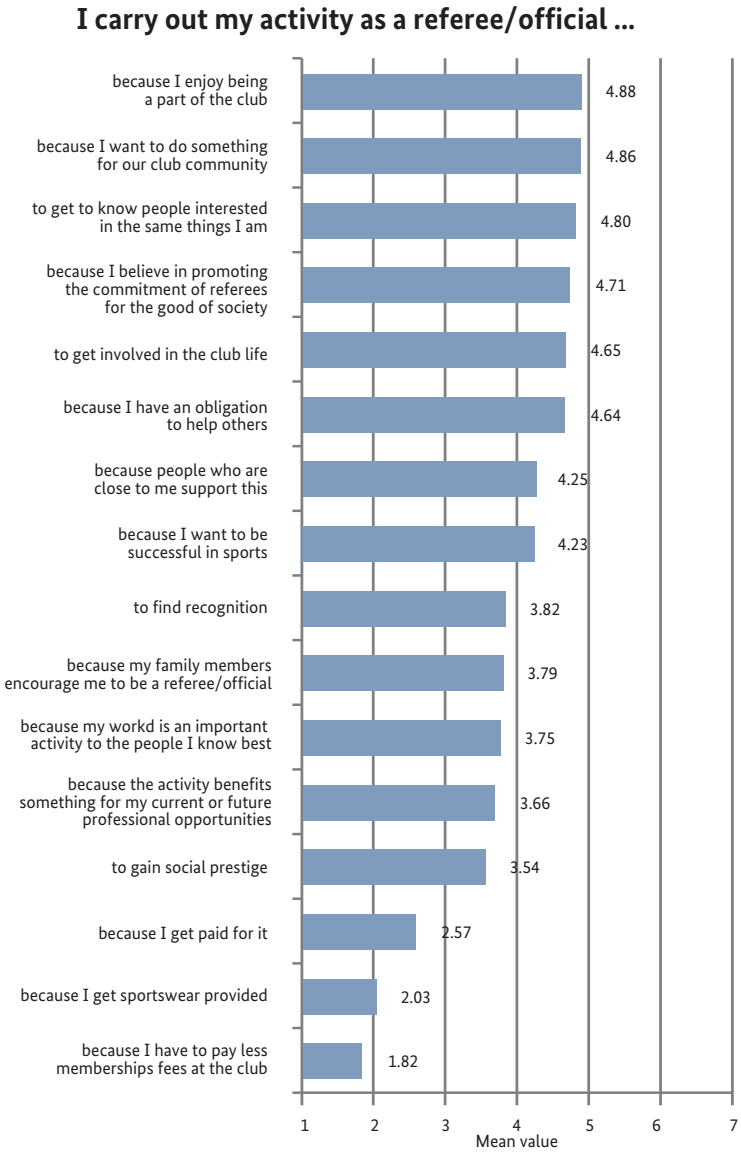

Fig. 24: Motives of the referees for carrying out their activity (1 = "do not agree at all" to 7 = "fully agree"; part 2).

al for the continuation of the activity in the current year (i.e. 2021) as well as in the following year is very high on average. On a scale of 1 (no agreement) to 5 (very high agreement), the mean is *M*=4.18, which relates to the continuation of the activity in the current year. However, this value is slightly below the value for the following year (*M*=4.28). An explanation for this could be the interruption of sports activities and, thus, of competitions in many areas at the time of the survey in spring 2021. As with the coaches and trainers as well as board members (cf. Breuer & Feiler, 2019), the approval for the continuation of the activity in three years is somewhat lower on average (*M*=3.91; cf. Fig. 25).

In addition, the referees were asked whether they plan to undergo further training for their activity in the coming year. Here the approval is, on average *M*=3.69 and thus at a similar level as the intention of the coaches and trainers in 2018 (Breuer & Feiler, 2019). The question about plans to give up the activity as a referee if a replacement could be found shows only a low level of agreement among the referees surveyed (*M*=1.68; cf. Fig. 25).

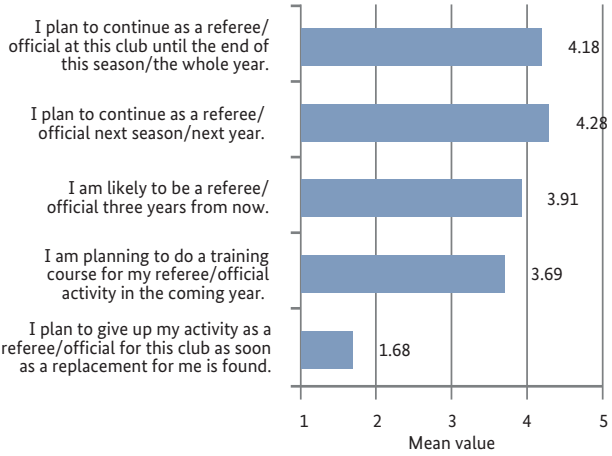

Fig. 25: Future plans of the referees (1="do not agree at all" to 5 ="fully agree").

4 Method

4.1 Background

The Sport Development Reports – "Analyses of the Situation of Sports Clubs in Germany" represent a further development of the Financial and Structural Analyses of German Sport (FISAS) with the aim of providing decision-makers in organised sport as well as in public sports policy and administration with timely information relevant to policy fields and management (argumentation and know-how). This support is intended to strengthen the competitiveness of organised sport in times of dynamic social change. The project is financed by the 16 federal state sports confederations, the German Olympic Sports Confederation (DOSB) and the Federal Institute for Sports Science (BISp)[25].

In mid-2017, Univ.-Prof. Dr. Christoph Breuer from the Institute of Sport Economics and Sport Management at the German Sport University Cologne was commissioned to carry out the seventh to ninth wave of the Sport Development Report ("SDR 3.0"). The methodical core concept of the Sport Development Report is still the development of a panel design. Therefore, starting with the seventh wave, the same sports clubs will be surveyed online about their situation every three years. Furthermore, new elements of the "SDR 3.0" are the so-called stakeholder surveys, i.e. surveys of different groups of people. In this context, the seventh wave of the survey also surveyed coaches and trainers as well as board members in addition to the clubs. In the following eighth wave, another two groups of people are surveyed, namely members and referees or officials. The individual stakeholder surveys are carried out in waves seven to nine after the respective surveys of the clubs.

25 Reference number ZMVI4-081802/17-26.

4.2 Quality assurance

To further improve the quality of the survey instrument, systematic changes were made to the questionnaire. This was based on the concept of the Total Survey Errors (cf. Arbeitsgruppe Qualitätsstandards, 2014), which initially distinguishes between the dimensions measurement and representation.

4.3 Organisation survey

With regard to a quality-assured measurement, it is necessary (a) to specify the constructs to be investigated, (b) to operationalise the construct of interest as accurately as possible or "appropriately in terms of content" (Arbeitsgruppe Qualitätsstandards, 2014, p. 12), and (c) to avoid errors in response behaviour.

4.3.1 Measurement

The constructs to be investigated in the organisational survey (meso level) are the public good character as well as the performance and survival of sports clubs in Germany and their determinants and correlates. In comparison to the first waves of the Sport Development Report, which aimed in particular at comparability with previous club studies (especially Heinemann & Schubert, 1994; Baur & Braun, 2001, 2003; Emrich, Pitsch & Papathanassiou, 2001), the revision of the measurement instrument for the meso-level in wave 7 gave top priority to validity. Since there is a trade-off between maximising validity and maximising comparability with previous studies, this was done at the expense of comparability with previous studies. The validity on the meso level, the organisational survey of the clubs, was increased in particular by the following measures: The complete coverage of the construct of the common good was advanced

by, among other things, systematising the item battery on the club's self-conception with regard to fields of action and target groups and by adding aspects of social compatibility and the prevention of negative common good functions. This means that the construct of the public good has been operationalised much more comprehensively and systematically than before. A theoretical orientation was provided by Rittner and Breuer (2004). The same applies to the functions of social integration or sociability and the provision of other sports activities. In addition, the entire questionnaire for the organisations was increasingly designed on the basis of theoretical foundations, in particular, the "organisational capacity" approach (cf. Hall et al., 2003). Thus, the three dimensions of organisational capacity (human resources capacities, financial capacities and structural capacities) are covered in the updated questionnaire of the organisation survey of the seventh wave of the Sport Development Report. The approach of organisational capacity has meanwhile become established in organisational sports research (e.g. Doherty, Misener & Cuskelly, 2014; Millar & Doherty, 2016; Misener & Doherty, 2013; Svensson & Hambrick, 2016) and serves, among other things, to explain organisational problems (cf. Wicker & Breuer, 2013; 2014).

An attempt was made to reduce possible errors in the answering process by formulating questions more clearly and comprehensibly (cf. e.g. also the item battery on the club's self-conception) or by providing further explanations and examples. In addition, as in the previous waves, it was possible to contact the project team by telephone or email if participants had questions or if clarifications were needed. In addition, a complete overview of the questionnaire was sent to the participants on request as a pdf file or as a paper version.

Furthermore, an attempt was made to exclude systematic response errors from the analysis. Thus, the quality of the financial information always shows up problems in part of the sample. In some

cases, financial information was provided on an incomprehensible scale. This concerns both the revenue and expenditure side. For this reason, a financial filter was used for the analysis of the club finances, as in the seven previous waves of the Sport Development Report. In order to obtain the most reliable financial values possible, the following quality criteria were subsequently assumed:

(1) Income from membership fees > (number of members * € 0.50),
(2) 4 > Revenue/expenditure > 0.25.

In addition, in the eighth wave, n = 14 outliers were denied the quality of the information regarding club finances. With this quality filter, the spread of the financial information in the eighth wave could be narrowed down significantly. Overall, 94.6 % of the clubs that provided information on club finances in the eighth wave correspond to these quality criteria. All evaluations of club finances (sections 2.1.4.3.2 to 2.1.4.3.7) only refer to those clubs to which these quality criteria apply.

4.3.2 Representation

4.3.2.1 Sampling and response

As in the first seven waves, an online survey was used as the survey method. The survey of this eighth wave was carried out from October 21, 2020, to December 21, 2020. The email addresses of the clubs provided by the state sports confederations served as the basis for the sample. A good 78,350 email addresses were sent from the 88,071 sports clubs in Germany (DOSB, 2020). A total of 78,353 sports clubs were invited by email to take part in the survey. The sample was adjusted for those clubs that could not take part in the survey for various reasons. The majority of these sample failures (3,283) are due to incorrect email addresses and rejections. A total

of n=20,179 interviews were carried out, which corresponds to a return rate of 26.9 %. Compared to the seventh wave[26], the sample size increased slightly nationwide (+1.5 %).

Tab. 30: Field overview of the club survey of the Sport Development Report 2020-2022 for Germany.

Sport Development Report 2020-2022	N	Proportion of sample I (in %)	Proportion of sample II (in %)
Population	88,071		
Sample I	78,353	100.0	
Incorrect email addresses, person no longer active in the club, club no longer exists / disbanding, refusals	3,283		
Adjusted sample II	75,070		100.0
Interviews taken place	20,179		
Participation (in %)	22.9	25.8	26.9

4.3.2.2 Weights

The evaluation of the data was carried out with weighted values in order to depict the population of German sports clubs as representatively as possible. For this purpose, size categories were formed on the basis of membership figures both in the data of the population of clubs and in the sample of clubs surveyed. In total, the clubs were divided into five size categories (up to 100 members; 101 to 300 members; 301 to 1,000 members; 1,001 to 2,500 members and over 2,500 members). Following this, in both data sets (population and sample) the distribution of the clubs according to size categories was determined. During this procedure, a distinction was made according to federal sports confederations. For each individual case, a weighting factor was then determined on the basis of the distri-

26 The response to the Sport Development Report 2017/2018 was n = 19,889 clubs.

bution of the size categories in the population of the respective federal state and the sample, with which the sample was then weighted for the final evaluation. This procedure was carried out both in the cross-sectional data set and in the longitudinal data set (see Section 4.3.3.1).

For the "member-weighted system perspective" introduced in the sixth wave, which shows the extent to which sports club members are affected by existential problem situations, the clubs were additionally weighted according to their membership size in relation to the average of all clubs, so that the data set is representative for the sports club members in Germany rather than for the sports clubs. In a first step, a quotient of the membership size of the club and the average membership size in the data set was calculated. In a second step, the original weighting factor described above was multiplied by this quotient. The product was then used as a weighting factor for member-weighted system perspective analyses. In the seventh wave, this system perspective was applied to the evaluation of membership fees in addition to the existential problems.

4.3.3 Data analysis

4.3.3.1 Longitudinal data

In order to construct a longitudinal data set and to avoid clubs being written to twice, all clubs were assigned an unchangeable club number (ID). With the help of this club number, it is possible to identify those clubs that took part in the individual survey waves. A total of n = 7,830 clubs nationwide took part in the 2017 and 2020 surveys (wave 7 and wave 8), which corresponds to a retention rate of 39.4 %.

4.3.3.2 Index formation

Since the second wave of the Sport Development Report, the changes in the production of the common good, but also the problems

of sports clubs in Germany, can be measured, which are based on a longitudinal analysis. In the present eighth wave, changes are primarily measured between 2017 and 2020. For the areas of democracy function (Section 2.1.5) and cooperation (Section 2.1.3.2), the longitudinal section with the fifth wave of the Sport Development Report (2013/2014) was used, since these two constructs were last surveyed in the fifth wave. The development over seven years, i.e. between 2013 and 2020, is shown here. The longitudinal dataset of the fifth and eighth waves includes n = 6,645 clubs.

The extent of the changes is illustrated using indices that reflect the percentage change. The basis for calculating the indices is the value determined in the longitudinal data set for the respective starting year. For example, an index of +12 means that (in the longitudinal data set) the said value has increased by 12 %. In the tables and figures, the starting year (survey year) is illustrated with the label "Index (2017=0)", which refers to the Sport Development Report 2017/2018 (7th wave). Finances are an exception here, where the development refers to the starting year 2016 (fiscal year) and is marked with "Index (2016=0)". The label "Index (2013=0)" refers to the starting year 2013 (5th wave of the SDR). With regard to the level of the indices, it should be noted that the indices can also be high for small changes (e.g. in the case of an increase in a value from 0.5 % to 1.5 %, the index would be +200).

In addition, the indices were examined to determine whether there were statistically significant changes (significance test: t-test). In this report, only the significant index changes are presented. The level of error probability, which is decisive for the determination of significance, is illustrated by the usual identification (cf. Tab. 31).

Tab. 31: Overview of error probabilities in statistical calculations and their identification.

Symbol	Meaning
*	significant, i.e. probability of error of the calculation is equal to/less than 5 %
**	very significant, i.e. probability of error of the calculation is equal to/less than 1 %
***	highly significant, i.e. probability of error of the calculation is equal to or less than 0.1 %

4.4 Individual stakeholder surveys

4.4.1 Procedure

In the seventh wave of the Sport Development Report, not only the sports clubs themselves, i.e. the meso level, but also coaches and trainers as well as board members were surveyed for the first time, i.e. the micro level was integrated. In the present eighth wave, club members as well as referees were also asked about the clubs. This extension has made it possible to develop the previous pure organisational surveys into an extended system analysis.

To contact the club members, the clubs were asked at the end of the club survey whether they would be willing to take part in the survey of their members. In the event of approval, the clubs were asked to provide an email address at which the clubs could be contacted as part of the member survey.

The sports federation were involved in questioning the referees. Interested federations had the opportunity to participate in the survey.

The sports clubs and federations that had agreed to take part in the stakeholder surveys were contacted by the project team before the start of the surveys. When contact was made, the planned

implementation of the stakeholder surveys was explained and support was offered with regard to the text for the invitation to the members or referees. The clubs and federations were asked to forward an individual link for the respective sports club or federation to their members or referees. Using this specific survey link, which contained the ID of the club or federation, it was then possible to allocate the people to the various clubs and federations.

4.4.2 Measurement

The analysis of the groups of people, which are to be understood here as internal stakeholder groups of the clubs, is about the production of knowledge of action. In the Sport Development Reports, for example, there are problems of attracting and retaining members and referees, which have risen above the waves. As part of the internal stakeholder surveys, the question arises as to the conditions and determinants of the acquisition and retention of these groups. In particular, constructs of satisfaction, identification, motivation and future plans of the members and referees (loyalty of the members or willingness to continue the work of the referees) are used. To operationalize these constructs, tested scales such as „Organizational Identification" (Mael & Ashforth, 1992), the „Motivation scale for sports volunteerism", i.e. a scale for measuring the motives of volunteers (cf. Hoye et al., 2008; Wang , 2004) and scales for measuring the intention to continue (Clary et al., 1998; Hoye et al., 2008) and satisfaction (Leipnitz, 2014; McDonald & Shaw, 2005) were applied.

In addition, there is also the question of the social significance and the contribution to the common good of the actions of the internal stakeholder groups, which is of central importance for the perspective of argumentation knowledge. This perspective is operationalized on the basis of various questions about the type, scope and time required for the activity, the target groups and socio-demographic information.

4.4.3 Representation

4.4.3.1 Sampling and responses of members

Of the 20,179 clubs that took part in the eighth wave club survey, 4,349 clubs agreed to take part in the member survey. On June 21, 2021, these clubs received the individual club link for forwarding and inviting their members to the survey. A reminder was sent during the field time, provided the clubs had not actively canceled their participation (reminder sent on July 27th, 2021). The reminder led to an increased response. The survey of the members was completed on August 26, 2021. A total of 8,298 members from 1,329 clubs took part in the survey.

The sample of members was weighted for the evaluation. For this purpose, in the data from the club survey, the average proportion of members who had attended the 2019 annual general meeting was set in relation to the proportion of members who had indicated in the member survey that they had attended the annual general meeting. This procedure was chosen because it was suspected that more committed members would take part in the member survey, who would also tend to attend the annual general meeting of their club more often. This assumption was confirmed because, according to the club survey, an average of around 26 % of the members took part in the annual general meeting, while in the member survey a good 49 % of the participating members stated that they had attended the annual general meeting.

The average participation in the annual general meeting was determined in both sets of data (club survey and member survey) differentiated according to club size using five size classes (up to 100 members; 101 to 300 members; 301 to 1,000 members; 1,001 to 2,500 members and over 2,500 members). In this procedure, a distinction was made between federal states. A weighting factor was then determined for each individual case of the member survey, with which the sample of members was weighted for the final evaluation.

4.4.3.2 Sampling and responses of referees

Referees were contacted by their respective professional federation. For this purpose, all federations were contacted via the DOSB in the run-up to the survey in order to find out if they were interested in taking part in the survey of the referees. A total of 18 federations have agreed to take part in the survey. These include: the German Football Association, the German Motor Sports Association, the German Taekwondo Union, the German Canoe Association, the German Judo Association, the Cheerleading and Cheerperformance Association Germany, the German Ju-Jutsu Association, the German Life Rescue Society, the German Rowing Association, the German Squash Association, the German Dance Sport Association, the German Tennis Association, the German Sailing Association, the German Gymnastics Association, the German Badminton Association, the German Athletics Association, the German Triathlon Union and the German Table Tennis Association.

On June 15, 2021, these federations received the individual link for forwarding and inviting their referees to take part in the survey. During the field time, the project team asked the federations to send a reminder to the referees. This request was made on July 27, 2021 and led to an increased response. The survey of the referees was completed on August 26th, 2021. A total of 7,193 referees actively participated in the survey.

4.4.3.3 Limitations of the stakeholder surveys

The procedure described above with regard to contacting and questioning the groups of people had to be chosen because another way of contacting the members and the referees was not possible due to data protection restrictions and a lack of a database. In addition, with regard to the planned multi-level analyses, it had to be ensured that the members could be assigned to their respective club.

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List of tables

List of figures

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