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Impact of the COVID-19 pandemic on sports clubs in Germany

Results of the COVID-19 supplementary survey as part of the
8th wave of the Sport Development Report



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1 Introduction



Sports clubs play a central role in society as places for gathering and playing sports together. However, in addition to the loss of shared sporting activities, the effects of the COVID-19 pandemic also restricted the community aspects and social exchange in particular. For months, local sports activities and joint activities were not possible at all or only to a limited extent. The question now arises to what extent the sports clubs were affected by the restrictions caused by the pandemic and what consequences this has for the programmes and structures of the sports clubs. The aim of the current supplementary survey of sports clubs as part of the Sport Development Report was therefore to record the consequences of the COVID-19 pandemic for sports clubs in Germany and to present selected developments in the course of the pandemic up to the survey period (early April to early June 2021).

This report is based primarily on the supplementary survey of sports clubs on the impact of the COVID-19 pandemic. This survey

was conducted in spring 2021 among clubs that had indicated their participation in the overall survey of the 8th wave in fall 2020. A total of 3,895 clubs participated in both surveys¹. This report, therefore, also takes into account changes between the dates of the two surveys, for example, in the area of volunteers, paid staff, certain problem areas, and the finances of the club.

The report is structured as follows: First, personnel changes due to the COVID-19 pandemic are discussed, i.e., the impact of the pandemic on members, volunteers as well as paid staff (Chapter 2). Changes in club operations are then considered (Chapter 3), followed by a presentation of support services offered by sports federations and the most pressing issues facing clubs (Chapter 4). This is followed by a detailed look at the financial situation of the clubs in 2020 and how it relates to the period before the COVID-19 pandemic (Chapter 5). A conclusion terminates the report (Chapter 6).

1 Details on the method and the response can be found in chapter 7.

2 Personnel changes



2.1 Members

Data from the Sport Development Report shows that the restrictions imposed by the COVID-19 pandemic have hit clubs primarily in their membership base. For example, the average number of entrants in 2020 fell to around 16 people, while clubs in “normal” years recorded just under 25 new entrants. Looking at the two age groups of children and adolescents and seniors over 60 years, on average more younger members joined clubs than older members. However, it can also be seen that the average number of entries in childhood and adolescence as well as in senior citizens is declining compared to “normal” years (cf. Tab. 1).

In contrast to the number of entries, the average number of resignations has risen to just under 24 compared to “normal” years. The number of resignations in the children’s and youth sector increased comparatively less than in the senior citizens’ sector (cf. Tab. 2).

On average, sports clubs lost a total of 8.2 members in 2020 (difference between entries and resignations). The decline in the number of members in the children’s and youth sector was slightly higher on average (-2.6) than in the senior citizens’ sector (-2.3). This development contrasts with the difference in entries and resignations in “normal” years. Here it can be seen that in “normal” years, the clubs recorded an average growth in membership of 4.8 members, whereby the growth in the children’s and adolescents area was greater on average (+3.6) than in the senior citizens’ area (+0.2; cf. Tab. 3).

The development presented in the DOSB survey for the years 2015 to 2020 fits in with this picture². Looking at these last five years, although the number of sports clubs has decreased slightly over the period under consideration, the number of memberships that can be allocated to the state sport confederations has tended to increase little (with the exception of 2017 compared to 2016). Due to a slightly downward trend

Tab. 1: Average number of entries into clubs in 2020 compared to “normal” years (mean value).

	Total number of entries	of which children and adolescents up to and including the age of 18	of which seniors over 60 years
	Mean value		
Entries in 2020	15.5	7.6	1.2
Entries in “normal” years	24.9	12.8	2.7

Tab. 2: Average number of resignations from clubs in 2020 compared to “normal” years (mean value).

	Total number of resignations	of which children and adolescents up to and including the age of 18	of which seniors over 60 years
	Mean value		
Resignations in 2020	23.7	10.2	3.4
Resignations in “normal” years	20.1	9.2	2.5

² The DOSB annual surveys for the above years were retrieved on 11/23/2021 from the following link: <https://www.dosb.de/medienservice/statistiken>

in the number of sports clubs and a slight upward trend in the number of memberships, the result is that the sports clubs have grown somewhat on average over the period mentioned in terms of the number of members.

If we look at the difference in entries and resignations differentiated by club size, we see that the difference in 2020 was much higher for larger clubs than for smaller clubs (cf. Tab. 4). This difference between the clubs of different sizes is statistically significant both overall and for the age groups of children and adolescents as well as senior citizens.

However, it can also be seen that the positive difference in entries and resignations overall in “normal” years was much higher for larger clubs than was the case for smaller clubs (cf. Tab.

5). Again, the differences between size classes are statistically significant. This result suggests a greater fluctuation of members in larger clubs than in smaller clubs.

If the size of the municipality in which the respective clubs are located is also included in the analysis, significant differences can be seen. Clubs based in smaller municipalities with up to 20,000 inhabitants recorded on average a smaller absolute decline in memberships than clubs in larger municipalities. This trend applies both overall and to the age groups studied (cf. Tab. 6).

It should be noted, however, that there is a significant positive correlation ($r=0.04^*$), albeit very small³, between the size of the club (measured in members) and the size of the municipal-

Tab. 3: Difference between entries and resignations in 2020 compared to “normal” years (mean value).

	Difference between entries and resignations total	Difference between entries and resignations in the children and youth segment (up to 18 years)	Difference between entries and resignations in the senior citizen segment (over 60)
	Mean value		
Difference in 2020	-8.2	-2.6	-2.3
Difference in “normal” years	+4.8	+3.6	+0.2

Tab. 4: Difference between entries and resignations in 2020, by club size (mean value).

Club size	Difference between entries and resignations total	Difference between entries and resignations in the children and youth segment (up to 18 years)	Difference between entries and resignations in the senior citizen segment (over 60 years)
	Mean value		
1-100 members	-0.6	-0.1	-0.5
101-300 members	-1.8	-0.4	-1.2
301-1,000 members	-14.0	-4.8	-4.1
1,001-2,500 members	-65.4	-24.6	-14.2
over 2,500 members	-384.1	-105.0	-57.6

³ According to Cohen (1988), values of the correlation coefficient r between 0.1 and 0.29 represent a small correlation. In this respect, the value of $r=0.04$ is to be classified as very small. The correlation coefficient r can assume values between -1 and +1, whereby an amount close to 1 represents a strong correlation and an amount close to 0 represents a weak correlation.

Tab. 5: Difference between entries and resignations in “normal” years, by club size (mean value).

Club size	Difference between entries and resignations total	Difference between entries and resignations in the children and youth segment (up to 18 years)	Difference between entries and resignations in the senior citizen segment (over 60 years)
	Mean value		
1-100 members	1.9	1.2	0.8
101-300 members	4.1	3.0	-0.2
301-1,000 members	7.1	6.4	-0.4
1,001-2,500 members	24.2	17.0	1.6
over 2,500 members	70.9	50.4	-8.7

Tab. 6: Difference between entries and resignations in 2020, by size of the municipality (mean value).

Community size	Difference between entries and resignations total	Difference between entries and resignations in the children and youth segment (up to 18 years)	Difference between entries and resignations in the senior citizens segment (over 60 years)
	Mean value		
Up to 20,000 inhabitants	-4.7	-1.5	-1.6
20,001-100,000 inhabitants	-8.0	-2.3	-2.3
100,001-500,000 inhabitants	-12.5	-4.5	-3.4
More than 500,000 inhabitants	-19.6	-6.2	-3.8

ity (measured in inhabitants). This result means that larger clubs also tend to be located in larger municipalities. A partial effect of the size of the municipality in relation to the difference in entries and resignations could therefore also be attributed to the size of the club.

However, in normal years it can be seen that in larger municipalities, more people join sports clubs in absolute terms than in smaller municipalities. This difference is also statistically significant, but only overall and for the age group of children and adolescents (cf. Tab. 7). Overall, the fluctuation in clubs in urban areas seems to be greater than in rural areas, both in “normal” years and in the Corona year 2020 (whereby the above-mentioned positive correlation between club and municipality size should also be noted).

Another indicator for the development of membership numbers is the percentage change

in membership numbers in 2020 per club. In percentage terms, the sports clubs recorded an average decline of -0.7 % in 2020. The evaluation by club size shows that, also in percentage terms, membership losses in 2020 took place mainly in larger clubs, while small clubs (up to 100 members) even recorded a slight increase in members on average (cf. Tab. 8). Here, too, the differences between the size classes of the clubs are statistically significant.

The greater average decline in the large clubs also explains why the overall decline in membership is greater. If we look at the development of membership figures as a whole, i.e. across all clubs, we see a decline of -3.3 %. This development mirrors the figures from the DOSB’s annual survey, where an overall decline of -3.5 % in members is reported (DOSB, 2021).

If we also look at the percentage distribution of the membership development of sports

Tab. 7: Difference between entries and resignations in “normal” years, by size of the municipality.

Community size	Difference between entries and resignations total	Difference between entries and resignations in the children and youth segment (up to 18 years)	Difference between entries and resignations in the senior citizens segment (over 60 years)
	Mean value		
Up to 20,000 inhabitants	+3.9	+3.2	-0.2
20,001-100,000 inhabitants	+4.8	+3.5	+0.9
100,001-500,000 inhabitants	+6.2	+4.0	+0.1
More than 500,000 inhabitants	+7.1	+5.1	+/-0.0

Tab. 8: Percentage change in the number of members, by club size (in %).

Club size	Percentage change in membership (in %)
1-100 members	+0.7
101-300 members	-1.0
301-1,000 members	-2.4
1,001-2,500 members	-4.3
over 2,500 members	-6.0

clubs in 2020, we see that, based on the clubs' data on entries and resignations, more than half of the clubs recorded a decline in membership, while the number of members remained unchanged at around 16 % of the clubs and around 30 % of the clubs recorded an increase in membership (cf. Fig. 1).

On the other hand, based on the data on entries and resignations in “normal” years, the majority of clubs report an increase in membership both overall and in the area of children and adolescents. The number of members in the senior citizens' area in “normal” years was estimated as unchanged by the majority of the clubs (cf. Fig. 2).

2.2 Human resources in sports clubs

2.2.1 Persons in management board functions

If, in addition to the members, we look at the people who were involved in board functions in the sports clubs in 2020, we see that, according to the clubs' statements, the number of people in board functions remained exactly the same between 01.01.2020 and 31.12.2020 in the vast majority of clubs (89.6 %). In contrast, just under 4 % of the clubs stated that the number of people in board functions had increased, while 6.5 % of the clubs recorded a decrease in the number of people in board functions (cf. Tab. 9).

The average change in the number of persons in board functions in the case of an increase (+1.8) is slightly higher than the average change in the case of a decrease (-1.5).

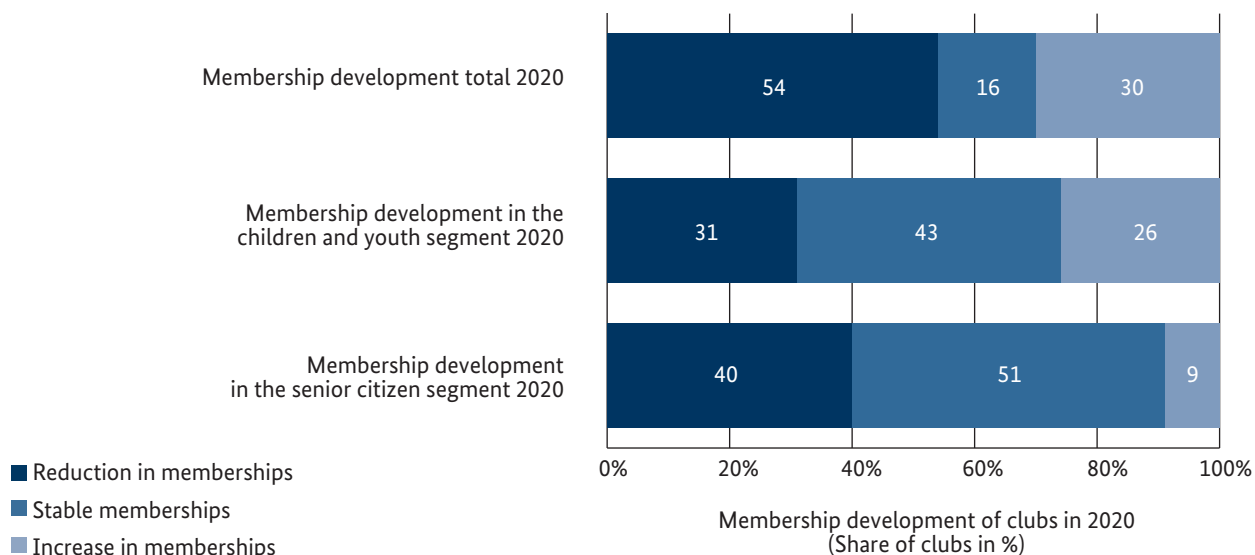


Fig. 1: Distribution of membership development of sports clubs in 2020 (share of clubs in %).

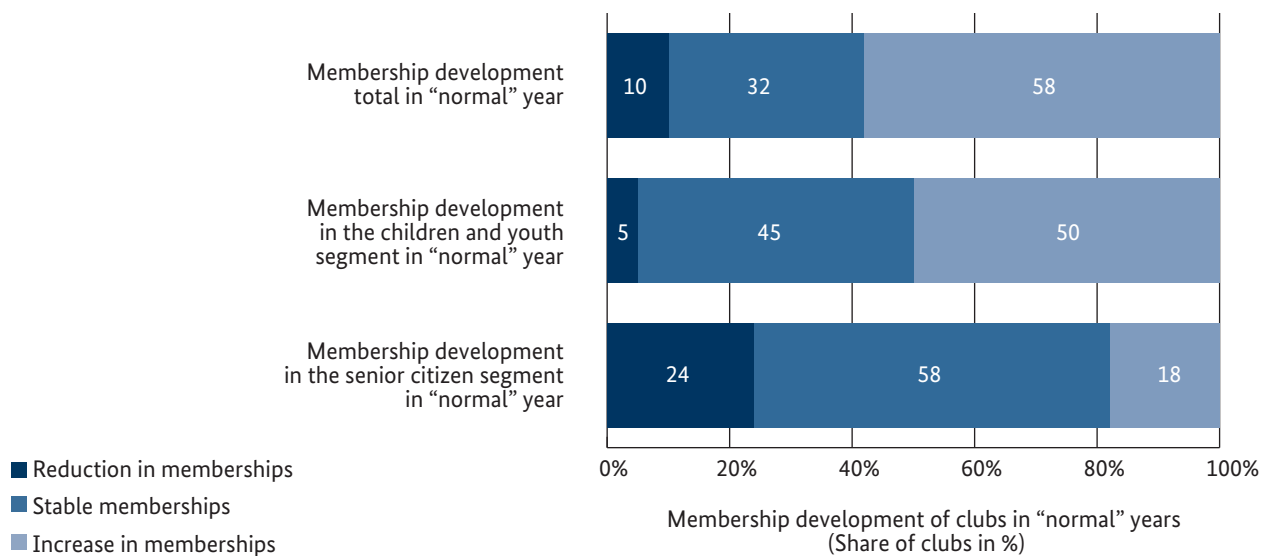


Fig. 2: Distribution of membership development of sports clubs in "normal" years (share of clubs in %).

Tab. 9: Change in the number of people in board functions in 2020 (share of clubs in %).

	Persons in board functions (share of clubs in %)
Number has remained exactly the same in 2020	89.6
Number has increased in 2020	3.9
Number has decreased in 2020	6.5

If we look at the percentage change in the number of people in board positions in 2020⁴, this change amounts to -0.5 % on average. The differentiation according to club size also leads to further insights. A decrease in the number of persons in board functions can be observed primarily in smaller clubs, while clubs with more than 2,500 members even recorded an average increase in the number of persons in board functions in 2020 (cf. Tab. 10). However, these differences between the club size categories in terms of percentage change are not statistically significant. An examination according to the size of the municipality also shows no significant differences.

2.2.2 Volunteer coaches and trainers

In the case of volunteer coaches and trainers, too, around four out of five clubs (just under 80 %)

stated that the number of people involved had remained exactly the same in 2020. In contrast, the proportion of clubs that recorded a decrease in the number of volunteer coaches and trainers, at just under 13 %, is somewhat larger than the proportion of clubs that recorded an increase, which applied to a good 7 % of the clubs (cf. Tab. 11).

If the sports clubs recorded a decrease in the number of volunteer coaches and trainers, this amounted to an average of 2.3 persons, while in the case of an increase in the number of coaches and trainers, there was an average increase of around two persons.

If we look at the average percentage change in the number of volunteer coaches and trainers between 01.01.2020 and 31.12.2020, we see a slight decrease of around -1.4 %⁵. Differentiated by club size, the average decline is largest in medium-sized clubs, at -2.1 % (cf. Tab. 12). How-

Tab. 10: Percentage change in the number of people in board functions in 2020, by club size.

Club size	Change in the number of persons in board functions in 2020 (in %)
1-100 members	-0.7
101-300 members	-0.5
301-1,000 members	-0.2
1,001-2,500 members	-0.2
over 2,500 members	+4.4

Tab. 11: Change in the number of volunteer coaches and trainers in 2020 (share of clubs in %).

	Volunteer coaches and trainers (share of clubs in %)
Number has remained exactly the same in 2020	79.8
Number has increased in 2020	7.4
Number has decreased in 2020	12.8

⁴ The baseline used here is the number of people in board roles in 2019, which was collected as part of the overall survey in the 8th wave of the Sport Development Report.

⁵ It should be noted, however, that for cases where the number of coaches and trainers was zero before 01.01.2020, i.e. in the data set of the total survey of the 8th wave, and at least one in 2020, no rate of increase could be calculated for mathematical reasons.

Tab. 12: Percentage change in the number of volunteer coaches and trainers in 2020, by club size.

Club size	Change in the number of volunteer coaches and trainers in 2020 (in %)
1-100 members	-1.2
101-300 members	-1.5
301-1,000 members	-2.1
1,001-2,500 members	-2.0
over 2,500 members	-1.7

ever, the differences between the size categories with regard to the percentage development of the number of volunteer coaches and trainers are not statistically significant. The same applies when looking at the size of the municipality.

2.2.3 Referees and officials

In addition to persons in board functions as well as volunteer coaches and trainers, the clubs were also asked about the change in the number of referees and officials between 01.01.2020 and 31.12.2020. A good 41 % of the clubs stated that their club generally has no referees. For about 51 % of the clubs, the number of referees remained the same in 2020. In contrast, around 3 % of clubs reported that the number of referees increased in 2020, while 4.4 % of clubs reported a decrease in the number of referees. With re-

gard to those clubs that generally have referees, the number of referees remained unchanged at around 87 %, while a good 5 % reported an increase and 7.5 % a decrease in the number of referees (cf. Tab. 13).

In both increases and decreases, the change in numbers averaged about two referees.

If we look at the percentage change in the number of referees/officials in the clubs, we see an average decline of around -4.3 % across all clubs⁶. The decline is smallest in medium-sized clubs with 301 to 1,000 members, while it is highest on average in large clubs with more than 2,500 members (cf. Tab. 14). However, the differences between the various club sizes and municipality sizes are not statistically significant.

If only those clubs that generally have referees or officials are included in the analysis, the average decrease is -6.8 %. Differentiated by

Tab. 13: Change in the number of referees and officials in 2020.

	Referees and officials	
	Share of clubs (in %)	Share of clubs that had referees/officials in 2020 (in %)
Number has remained exactly the same in 2020	51.1	87.3
Number has increased in 2020	3.1	5.2
Number has decreased in 2020	4.4	7.5
No referees/officials in the club in 2020	41.4	-

⁶ It should be noted, however, that for cases where the number of referees or officials was zero before 01.01.2020, i.e. in the data set of the total survey of the 8th wave, and at least one in 2020, no rate of increase could be calculated for mathematical reasons.

Tab. 14: Percentage change in the number of referees/officials in 2020, by club size.

Club size	Change in the number of referees/officials in 2020 (in %) in relation to all clubs	Change in the number of referees/officials in 2020 (in %) in relation to clubs that have referees/officials in general
1-100 members	-4.0	-7.3
101-300 members	-5.5	-8.8
301-1,000 members	-3.4	-3.9
1,001-2,500 members	-4.6	-4.9
over 2,500 members	-6.3	-7.3

club size, the decline in very small and very large clubs amounts to -7.3 % each and is comparatively greatest in clubs with 101 to 300 members with an average of -8.8 %. The smallest average decline of -3.9 % is recorded in medium-sized clubs with 301 to 1,000 members (cf. Tab. 14).

2.2.4 Paid staff

In addition to volunteers, some of the sports clubs in Germany also have paid staff. Almost 60 % of the clubs stated that they had no paid staff in 2020. According to the clubs, the number of paid staff remained stable in 36 % of the sports clubs in 2020. In contrast, 1.7 % of clubs reported an increase in paid staff in 2020, while the number of paid staff has decreased in 3.3 % of clubs. In terms of those clubs that had paid staff in 2020, the number was unchanged in 88 % of clubs, while just over 4 % reported an increase and 8 % a decrease in the number of paid staff (cf. Tab. 15).

In the case of an increase in paid staff, this amounted to an average of 1.5 paid staff members, while in the case of a decrease, it was around two paid staff members.

If we look at the average percentage change in the number of paid staff in sports clubs across all clubs, we see a decrease of around -13 % in 2020⁷. It is clear that the average per-

centage decrease is higher for smaller and medium-sized clubs (up to 1,000 members), while the percentage change for clubs with more than 2,500 members is lower at around -5 %. The differences, especially between clubs with 101 to 300 members and, on the one hand, smaller clubs and, on the other hand, larger clubs with 1,001 to 2,500 members, are statistically significant. It should be noted, however, that larger clubs have, on average, a larger number of paid staff overall, so that the loss of individual paid staff accounts for a smaller percentage than is the case with smaller clubs.

If only those clubs that generally have paid staff are included in the analysis, the average decline is -22.1 %. Differentiated according to the size of the club, smaller clubs with up to 300 members suffered the greatest average decline, while large sports clubs with more than 1,000 members had to cope with smaller declines on average (cf. Tab. 16).

Looking at the percentage change in the number of paid staff by municipality size, there are no significant differences.

2.2.5 Consideration by type of sports

In order to differentiate not only according to club and municipality size in the percentage development of persons in sports clubs, an ad-

⁷ It should be noted, however, that for cases where the number of paid staff was zero before 01.01.2020, i.e. in the data set of the total survey of the 8th wave, and at least one in 2020, no rate of increase could be calculated for mathematical reasons.

Tab. 15: Change in the number of paid staff in 2020.

	Paid staff	
	Share of clubs (in %)	Share of clubs that had paid staff in 2020 (in %)
Number has remained exactly the same in 2020	36.0	88.0
Number has increased in 2020	1.7	4.0
Number has decreased in 2020	3.3	8.0
No paid staff in the club in 2020	59.1	-

Tab. 16: Percentage change in the number of paid staff in 2020, by club size.

Club size	Change in the number of paid staff in 2020 (in %) in relation to all clubs	Change in the number of paid staff in 2020 (in %) in relation to clubs that generally have paid staff
1-100 members	-11.2	-23.7
101-300 members	-16.3	-27.8
301-1,000 members	-14.3	-18.0
1,001-2,500 members	-6.4	-7.0
over 2,500 members	-5.2	-5.2

ditional evaluation was carried out across all clubs according to the types of sports offered. It should be noted, however, that these sports are not necessarily offered exclusively, i.e. no differentiation was made here between single and multi-sports clubs⁸. The results can be found in Tab. 17.

It can be seen that, depending on the types of sport offered, there are varying degrees of change in the number of people in the different functions of sports clubs. It is noticeable, for example, that clubs offering boxing experienced the greatest average percentage decline in 2020 in the number of people in board functions (-3.2 %) and in the number of volunteer coaches and trainers (-3.8 %). The percentage decrease in referees and officials (-6.2 %) as well as in paid staff (-17.3 %) was also high in clubs offering boxing. Clubs offering judo also expe-

rienced comparatively larger decreases in the number of persons in board functions (-1.7 %) and volunteer trainers and coaches (-3.3 %). On the other hand, the decline in the number of referees and officials (-10.1 %) as well as in the number of paid staff (-21.6 %) was, on average, greatest in clubs offering golf. In contrast, there was a positive (albeit small) development in the number of people in board functions in clubs with tennis (+0.4 %), hockey (+0.3 %) and hiking (+0.1%) on offer. In addition, it is noticeable that in outdoor sports (sailing, canoeing/kayaking, rowing and cycling), there is a positive development in volunteer trainers and coaches. For example, there was a percentage increase in the number of volunteer coaches and trainers of 5.5 % on average in clubs offering sailing sports and of around 3 % in clubs offering canoeing sports (cf. Tab. 17).

⁸ From a methodological point of view, the sample size in individual sports would be too small if only single-sport clubs were considered.

Tab. 17: Percentage change in the number of people in sports clubs in 2020, by type of sport offered (not exclusive, i.e. also offered in multi-sport clubs).

Sport offers	Persons in board functions	Volunteer coaches & trainers	Referees & officials	Paid staff
	Change in 2020 (in %)			
Badminton	-0.6	-2.9	-4.8	-14.2
Basketball	-0.1	-2.2	-4.0	-9.6
Boxing	-3.2	-3.8	-6.2	-17.3
Soccer	-0.1	-1.8	-3.5	-17.0
Fitness / Aerobics	-0.5	-1.4	-3.4	-15.8
Golf	-1.1	-3.0	-10.1	-21.6
Gymnastics	-0.6	-1.4	-4.9	-17.2
Handball	-0.3	-1.3	-5.1	-15.3
Hockey	+0.3	-3.1	+0.4	-3.6
Judo	-1.7	-3.3	-1.1	-7.6
Canoe / Kayak	-0.8	+3.0	-3.1	-4.5
Athletics	+/-0.0	-2.4	-3.9	-11.6
Equestrian	-0.6	-2.6	-5.4	-11.1
Cycling	-0.6	+0.5	-5.2	-12.2
Rowing	-1.7	+0.7	-0.8	-13.7
Shooting Sports	-0.1	-1.3	-6.8	-9.1
Swimming	-0.2	-1.2	-6.1	-10.7
Sailing	-0.5	+5.5	-6.0	-9.8
Skiing	-0.1	-0.8	-5.5	-10.6
Dancing	-0.5	-1.8	-2.9	-16.4
Tennis	+0.4	-1.1	-5.2	-15.0
Table tennis	-0.3	-2.8	-4.2	-13.2
Apparatus Gymnastics	-0.4	-2.0	-3.9	-13.4
Volleyball	-0.6	-2.2	-3.6	-13.9
Hiking	+0.1	-0.3	-3.3	-13.8

3 Changes in club operations due to COVID-19



3.1 Sport programmes

In order to be able to replace the closure of the sports facilities and thus the discontinuation of the sports programmes in the lockdown, at least to some extent, the sports clubs expanded parts of their sports programmes with digital substitute offers. In the first lockdown, the share of sports programmes for which digital substitutes were implemented was 6.6 %, while in the second lockdown, an average of 10.4 % of sports programmes were replaced by digital offerings (cf. Tab. 18). Thus, in the first lockdown, around 70 % of the clubs stated that they had not created any digital substitutes, while the proportion fell to around 60 % of the clubs in the second lockdown.

If one differentiates here according to the size of the clubs measured by the number of members, it becomes apparent that larger clubs tended to be able to replace a larger proportion of their sports programmes with digital substitutes. This result is particularly evident in the course of the second lockdown. Here, smaller clubs were able to replace an average of around 10 % of their sports programmes, while large clubs with more than 2,500 members replaced just under a quarter of their sports programmes

with digital offerings (cf. Tab. 18). This difference between the club size categories is statistically significant in the second lockdown.

If we also look at the size of the municipality, we see that clubs in small municipalities with up to 20,000 inhabitants were the least likely to use digital substitutes compared to clubs in all larger municipalities. This result is true for both the first and second lockdown (cf. Tab. 19). The differences between clubs in small municipalities and clubs in very large municipalities or large cities are statistically significant, i.e. clubs in urban areas made more frequent use of digital substitutes.

Alternatively, clubs relied on outdoor activities (e.g. using open spaces instead of gyms) to replace their sports programmes during the pandemic. On average, clubs were able to replace just under 13 % of their sports provision by moving it outdoors. Again, this shows that larger clubs were able to replace a greater average proportion of their sports programmes with outdoor activities than was the case for smaller clubs (cf. Tab. 20). This difference is also statistically significant. In contrast to the digital offers, however, there is no significant difference in the offer of outdoor activities based on the size of the municipality.

Tab. 18: Proportion of sports programmes for which digital substitutes were implemented in the lockdowns, by club size (mean value).

	Digital substitutes in the 1st lockdown	Digital substitutes in the 2nd lockdown
	Share of sports programmes (mean value)	
Total	6.6	10.4
By club size		
1-100 members	6.3	9.2
101-300 members	6.5	10.0
301-1,000 members	6.8	12.6
1,001-2,500 members	8.2	17.6
over 2,500 members	11.1	24.0

Tab. 19: Proportion of sports programmes for which digital substitutes were implemented in the lockdowns, by municipality size (mean value).

Community size	Digital substitutes in the 1st lockdown	Digital substitutes in the 2nd lockdown
	Share of sports programmes (mean value)	
Up to 20,000 inhabitants	5.1	8.4
20,001-100,000 inhabitants	8.2	12.4
100,001-500,000 inhabitants	6.5	10.5
More than 500,000 inhabitants	9.1	14.2

Tab. 20: Proportion of sports programmes replaced by outdoor activities (mean value).

	Substitution of sports programmes by outdoor activities	
	Share of sports programmes (mean value)	
Total	12.9	
By club size		
1-100 members	10.9	
101-300 members	13.3	
301-1,000 members	15.8	
1,001-2,500 members	20.4	
over 2,500 members	22.3	

3.2 Board meetings

In the wake of the pandemic, it was not only restricted sporting activities; the personal contact between board members was also affected by the restrictions imposed by the pandemic. Almost two-thirds (64.7 %) of the clubs stated

that they had changed the timing of their board meetings during the first lockdown, while 42.7 % of the clubs changed the timing of their board meetings during the second lockdown. The majority of these clubs held their board meetings less frequently or much less frequently than was the case before the pandemic (cf. Tab. 21).

Tab. 21: Change in the frequency of the board meetings of the clubs in the 1st and 2nd lockdown (share of clubs for which the timing changed, in %).

	Changed frequency of board meetings in the 1st lockdown	Changed frequency of board meetings in the 2nd lockdown
	Share of clubs for which the frequency changed (in %)	
Much rarer	59.3	61.0
Rarer	30.2	26.4
More often	7.4	9.8
Much more often	3.1	2.8

3.3 Club events

The other events of the clubs were also affected by the restrictions due to the pandemic. However, around half of the clubs (50.8 %) were able to hold their annual general meeting (AGM) in 2020. Of these, the majority of AGMs (85.6%) were held face-to-face, just under 8 % digitally and just under 3 % by circulation (cf. Tab. 22). On average, around 27 % of members took part in the annual general meetings held by their clubs in 2020.

In contrast, social events could only be held by just under 23 % of sports clubs in 2020. The survey asked about both face-to-face and digital social events. Of the almost a quarter of clubs that offered such events, 86 % organised their social events in a physical setting, while 25.5 % chose digital formats (cf. Tab. 23). On average, around 31 % of members took part in these events in 2020.

3.4 Reactions of the clubs: Measures taken

In order to mitigate the consequences of the pandemic, some sports clubs in Germany took further measures in addition to the replacement of the sports offers described above. Almost half of the clubs relied on a (greater) digitalisation of the club management, and every tenth club planned to do so in the future. During the pandemic, around 42 % of clubs also communicated more intensively with their members. However, a similarly high proportion stated that they had not done so. Overall, less action was taken in the area of modernising sports facilities and building up reserves, while only a small proportion of clubs had adopted new approaches to finding funding sources. More than three-quarters of clubs have not addressed this issue (cf. Fig. 3). One possible reason could be that the financial pressure during the pandemic was not the biggest problem for the clubs (cf. also Section 4.4).

Tab. 22: Form of holding the annual general meeting (AGM) if the AGM took place in 2020 (share of clubs in %).

	Form of holding the AGM in 2020 (share of clubs that held an AGM in %)
In presence	85.6
Digital	7.8
By circulation	2.7
In a mixed form (e.g. presence and digital)	2.2
Outdoors	1.0
Normal, i.e. before the start of the pandemic	0.6
Conference of Delegates	0.1

Tab. 23: Form of holding social events if events were held in 2020 (share of clubs in %).

	Form of implementation of social events in 2020 (share of clubs that offered events in %)
In presence	86.0
Digital	25.5

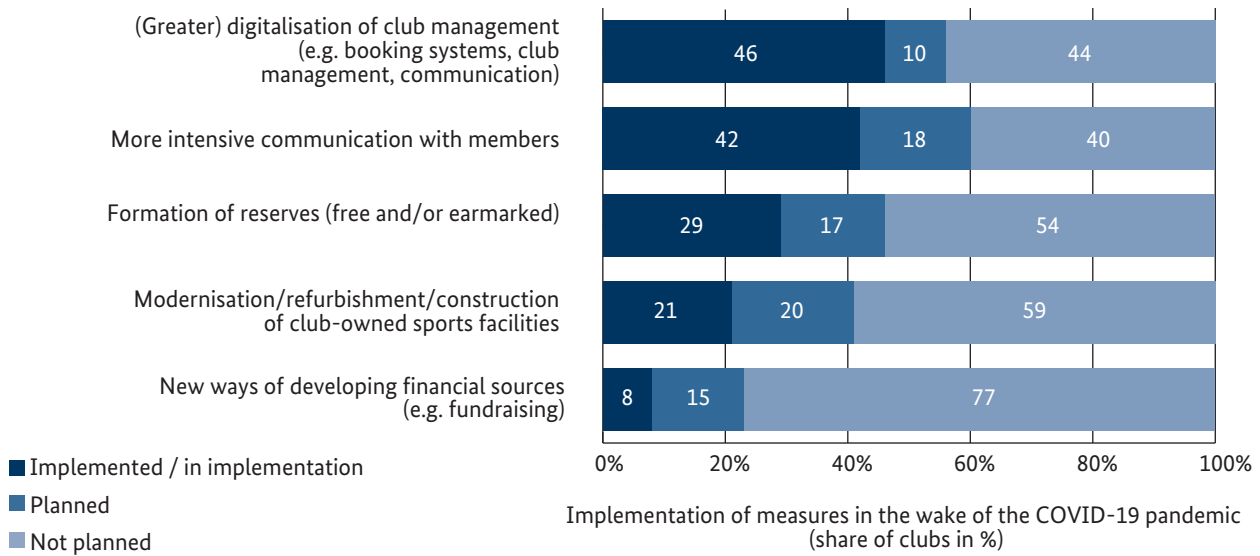


Fig. 3: Distribution of the shares of clubs that have implemented measures in the wake of the COVID-19 pandemic.

If we also differentiate here according to the size of the clubs, it becomes apparent that these measures tended to be implement-

ed more by larger clubs with a higher number of members than was the case with smaller clubs.

4 Support options and needs



4.1 Support services provided by the federations

In addition to the internal measures, the sports clubs were able to make use of various support services and measures from the sports federations in 2020. It can be seen that around 40 % of the clubs made use of one or more support services, while just under 60 % did not make use of any support from the sports federations. If one differentiates here according to the size of the club, the proportion of clubs that have not made use of any support services decreases as the size of the club increases. This means that, on average, significantly fewer small clubs made use of support services provided by the federations (cf. Tab. 24).

Differentiated by the size of the municipality, there are no differences in the use of support services by the clubs. However, it is noticeable that there were certainly differences in the use of support services of clubs in the various federal states. In Bremen, for example, only around one-fifth of the clubs did not make use of any support services, and in Saarland, this ap-

plied to around one third, while in Saxony-Anhalt, Mecklenburg-Vorpommern, Hesse, Schleswig-Holstein and North Rhine-Westphalia, about two-thirds of the sports clubs did not make use of support services or measures provided by the sports federations (cf. Fig. 4).

Just under a fifth of the clubs took advantage of support services in the form of counselling and information on legal issues related to the organisation of the club, while slightly fewer clubs took advantage of counselling and information in the context of financial support services and the implementation of sporting activities under pandemic conditions. A good 14 % of clubs took part in digital education measures in the area of sports practice and a good 13 % in the area of club management. Just under 8 % took advantage of special funding programmes related to COVID-19 (e.g. for the creation of digital offers). There was a tendency for fewer clubs to use support services in the area of sports facility construction or the acquisition of new sports equipment, and very few clubs indicated the provision of in-kind services as support services (cf. Fig. 5).

Tab. 24: Proportion of clubs that did not use support services from sports federations in 2020 (in %).

No support services used in 2020 (share of clubs in %)	
Total	59.3
By club size	
1-100 members	70.4
101-300 members	55.6
301-1,000 members	43.4
1,001-2,500 members	30.1
over 2,500 members	12.1



Fig. 4: Proportion of clubs (in %) that did not use support services from sports federations in 2020, by federal state.

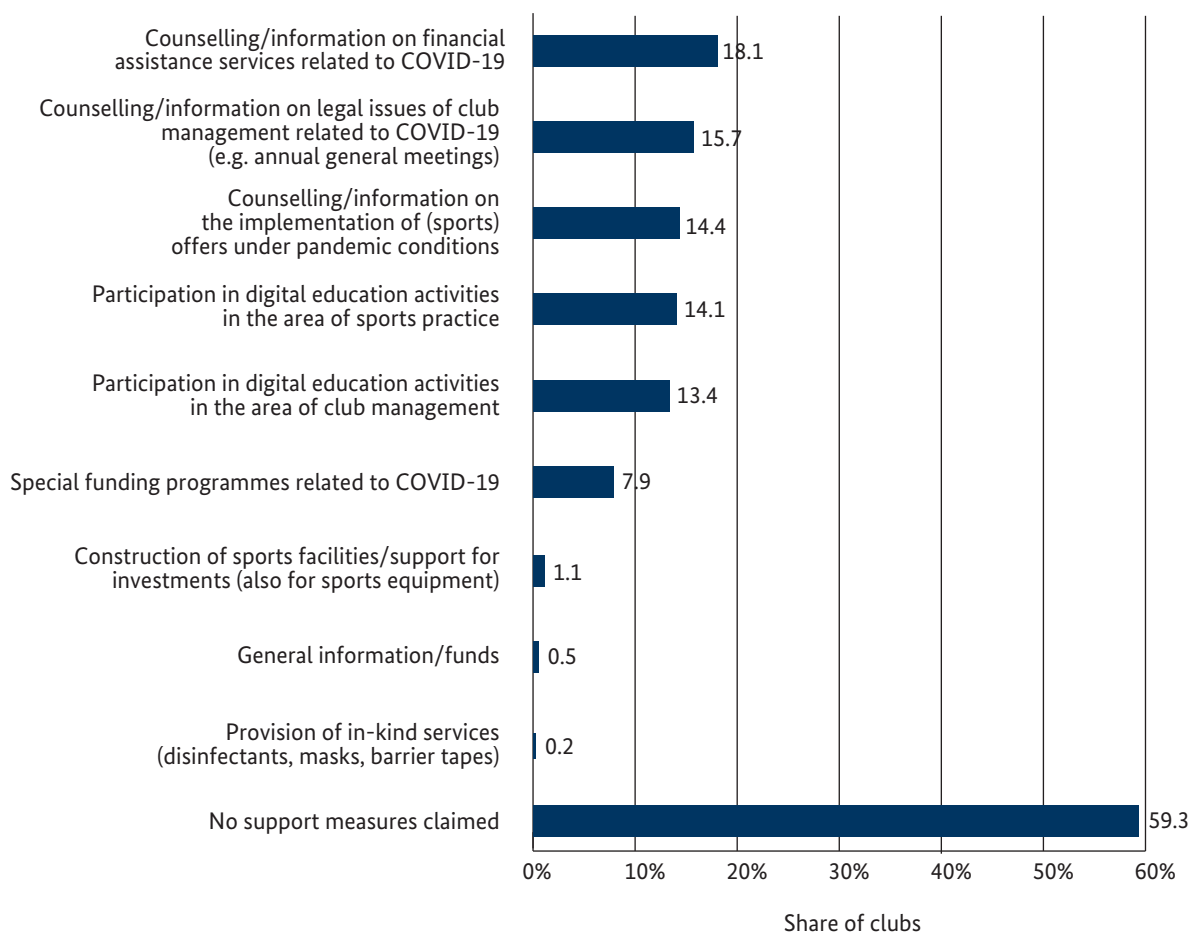


Fig. 5: Proportion of clubs that have used support services from sports federations in 2020 (in %).

4.2 General problems

As is known from the regular waves of the Sport Development Report, the sports clubs were also asked in the COVID-19 survey about selected current problem situations. This means that the information on the average size of the problems, in this case, refers to the time of the survey in spring 2021. It can be seen that the biggest problem at this time was the retention and recruitment of members, followed by the problems of retaining and recruiting volunteer officials, the number of laws, orders and regulations, and support from politics and administration. Clubs were least likely to perceive the financial situation as a problem (see Fig. 6). This assessment is confirmed by the objective financial figures (cf. Section 5.3).

If we look at the development of the magnitude of the problems compared to autumn 2020 (i.e. the period of the regular club survey as part of the 8th wave), two opposing trends emerge: While the problems in the area of membership and due to the (lack of) support from politics and administration have increased compared to the club survey in autumn 2020 (October to December 2020), problems in the area of voluntary staff (volunteer functionaries, coaches and trainers, referees) and digital competence have decreased (cf. Fig. 6).

It is thus clear for the first time in the history of the Sport Development Report that there has been a significant shift in the assessment of the problem situations. Thus, it is no longer the voluntary work problems that are seen as the

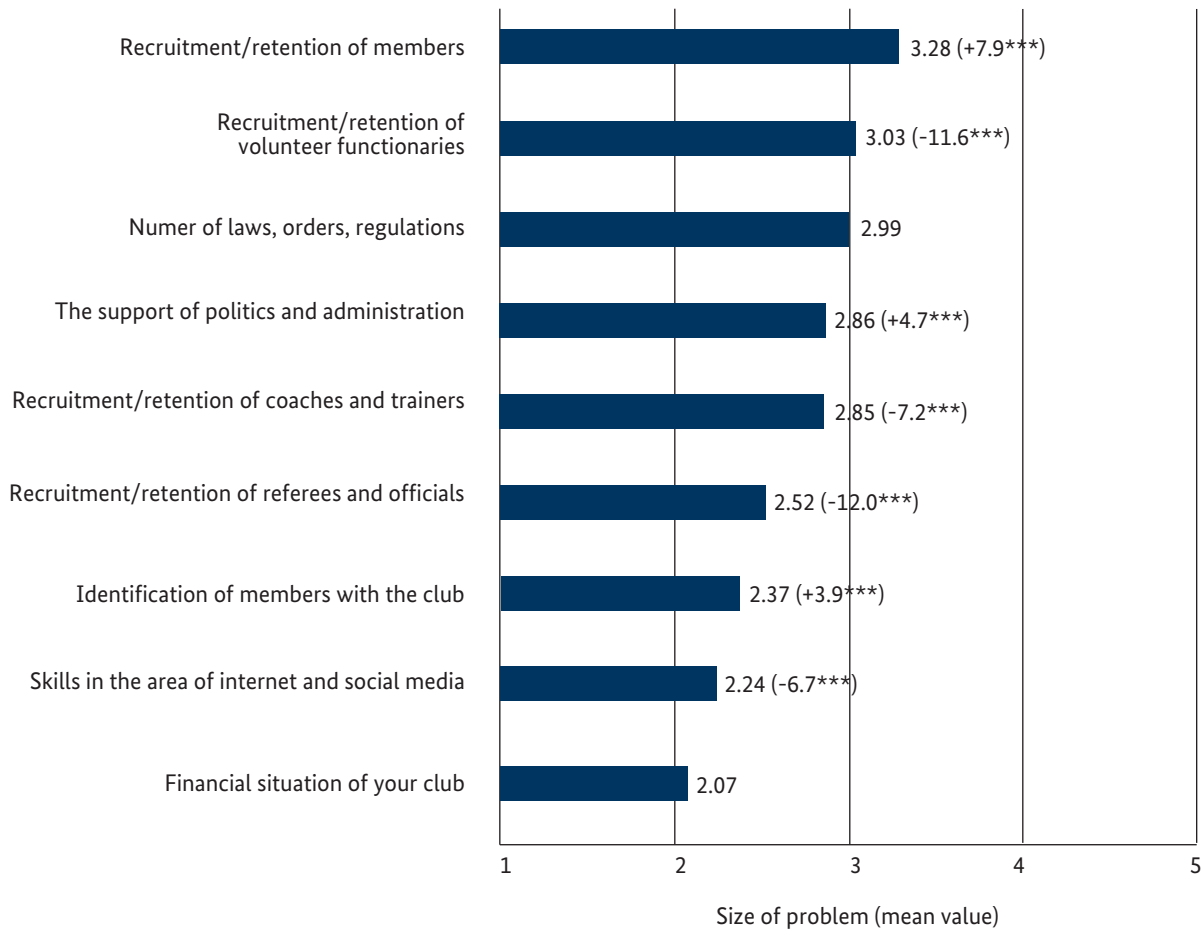


Fig. 6: Selected problems of the clubs, sorted by size, and their development (1=“no problem”, 5=“a very big problem”; in brackets: Index: 2020=0).

greatest challenges by the clubs, but the problem of retaining and recruiting members. However, it should be noted here that at the time of the COVID-19 survey in spring 2021, sports operations had not yet restarted in many areas, or only to a limited extent. Therefore, it is possible that the decisions of some volunteer coaches and trainers, as well as of referees and officials, to continue their involvement will be delayed – namely, only when sports operations can resume at pre-pandemic levels. A delayed problem jump in the area of retaining and recruiting volunteers can therefore not be ruled out.

When considering the development of the problems between autumn 2020 and spring

2021, it should be noted that the regular club survey of the 8th wave of the Sport Development Report was conducted from October to December 2020 and thus, the start of the second lockdown (November 2nd, 2020) fell exactly into the survey period. On the other hand, by the time of the COVID-19 supplementary survey in spring 2021, some sports facilities had already reopened, allowing for a slow return to sports operations and thus club operations. These circumstances are likely to explain the development of the problematic situations described partly. It is particularly important to note that even after the (partial) openings, the clubs still felt increasingly burdened by a lack of support

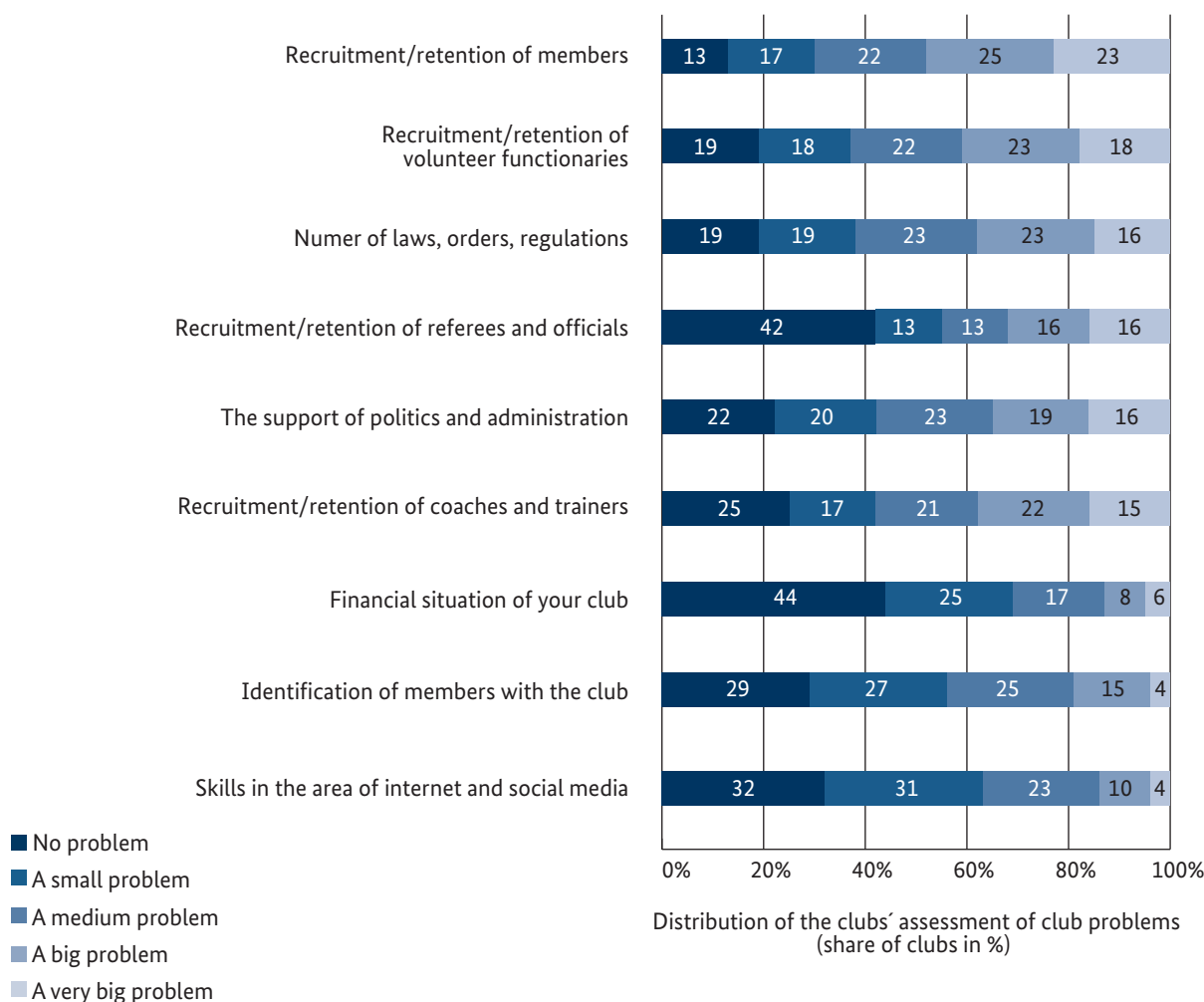


Fig. 7: Distribution of the sports clubs' assessment of club problems (share of clubs in %).

from politics and the administration. This fact should be included in the sports policy discussion on the status of sports clubs and should also be taken into account in the context of the federations' lobbying work.

If we look at the distribution of the clubs' assessment of the club problems instead of the mean values, a similar picture emerges (cf. Fig. 7). However, the problem of retaining and recruiting referees was perceived as a very big or big problem by around 16 % of the clubs, while around 42 % of the clubs did not perceive this as a problem at all. The mean value could therefore be distorted by the high number of clubs that do not have any referees in their ranks (cf. Tab. 13)

so that in reality, the problem seems to be somewhat more prevalent in clubs with referees than the mean value would suggest (cf. Fig. 6).

The financial situation of the clubs is not perceived as a problem by around 44 % of the clubs, and a further 25 % of the clubs classify the problem as small. However, around 14 % of the clubs also state that they perceive the financial situation as a big or very big problem (cf. Fig. 7).

4.3 Existential problems

If, in addition to the general problems, we also look at those problems that were classified by the

sports clubs in spring 2021 as threatening their existence, the following picture emerges. 15 % of the clubs saw their existence threatened by the problem of retaining and recruiting members. This proportion has increased significantly compared to the club survey in autumn 2020. This is also the first time that a marked shift in the problem can be seen, as a higher proportion of clubs rate the existential problem of retaining and recruiting members as greater on average than the problems of volunteering. Every tenth club also sees its existence threatened by the retention and recruitment of voluntary functionaries, and just under 9 % cite the (lack of) support from politics and administration as a threat to their existence. It fits in with this that a good 8 %

classify the number of laws, orders and regulations as a threat to the continued existence of the clubs (cf. Fig. 8). Bureaucracy thus continues to be a burdening factor for sports clubs in Germany.

Compared to autumn 2020, the proportion of clubs that see their existence threatened not only by the retention and recruitment of members but also by the identification of members with the club, by a lack of support from politics and administration and by the financial situation has increased. However, only a relatively small number of clubs cited the financial situation and the identification of members with the club as a threat to their existence. In contrast, the perceived existential pressure in the area of

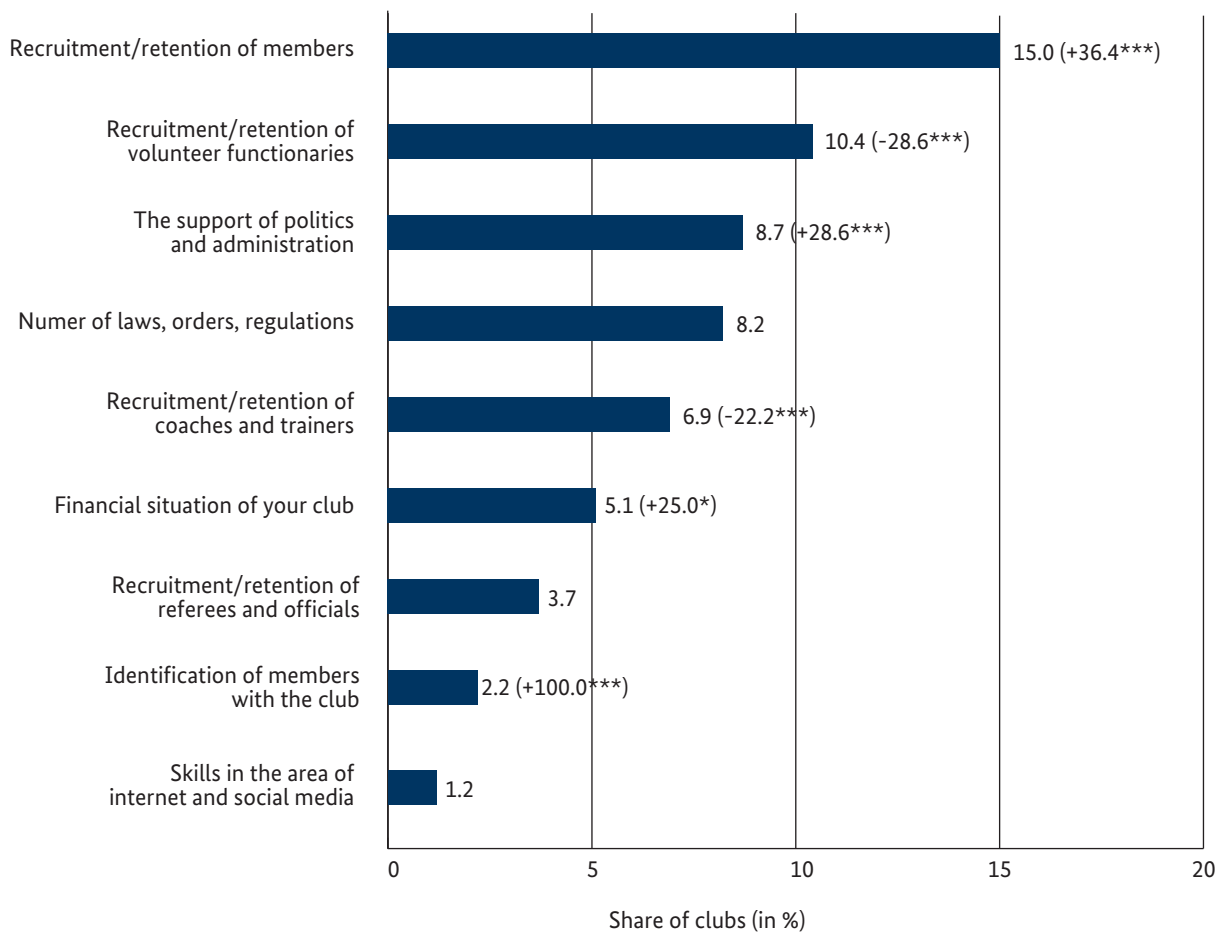


Fig. 8: Proportion of sports clubs with problems threatening their existence and their development (in %; in brackets: index: 2020=0).

retaining and recruiting volunteer officials as well as trainers and coaches has decreased compared to autumn 2020 (cf. Fig. 8).

4.4 Problems due to the COVID-19 pandemic

In addition to the general problems that are regularly queried in the Sport Development Report, the sports clubs were explicitly asked about problems due to the COVID-19 pandemic. This question was asked both in the overall survey in autumn 2020 and in the COVID-19 supplementary survey in spring 2021. In autumn, the clubs were asked about the likelihood of experiencing existential problems within the next 12 months due to the pandemic in the area of the financial situation of the club and in the retention and recruitment of members and volunteers. The spring 2021 COVID-19 supplementary survey asked the same question, but with a time horizon of experiencing existential problems due to COVID-19 by the end of 2021. A percentage value of zero, in this case, means that an existential threat is not at all likely, while a percentage value of 100 means the potential threat is absolutely likely⁹.

The results show that, on average, sports clubs in autumn 2020 were more likely to see their existence threatened in all three areas than they were at the time of the survey in spring 2021¹⁰. For example, clubs in autumn 2020 reported an average of just over 19 % likelihood of experiencing existential problems due to their financial situation within the next 12 months (from the time of the survey). There was an even

greater perceived likelihood of experiencing existential problems in retaining and recruiting volunteers (29.5 %) and members (34.7 %). In all three areas, however, the perceived existential threat decreased significantly in 2021, i.e. the actual problem development was significantly weaker than the initially suspected problem development. The decline in the perceived threat was particularly large (-26.4 %) in the financial situation. For example, in spring 2021, the sports clubs, on average, only feared an average probability of around 14 % for an existential threat due to the financial situation by the end of 2021. The other two problem areas also show a slight decrease in the perceived existential threat from the pandemic, although the values are still relatively high in spring 2021 compared to the area of finance (cf. Tab. 25).

Differentiated by club size, significant differences emerge in spring 2021 in the assessment of potentially existence-threatening problems in the financial situation and the retention and recruitment of members. The smallest and largest clubs, in particular, feel threatened by these two potentially existential problems due to the pandemic (cf. Tab. 26).

The analysis by municipality size reveals hardly any differences. Only the potentially existence-threatening problem of retaining and recruiting volunteers is rated significantly higher by clubs in small municipalities with up to 20,000 inhabitants (28.9 %) than by clubs in very large municipalities or large cities with more than 500,000 inhabitants (21.1 %).

This trend is underpinned by a differentiated view of the problem assessment by federal state. For example, clubs in Hamburg,

9 The questions are based on a question in a special survey of the socio-economic panel (SOEP) on the topic of COVID-19 in 2020. The question in the SOEP dealt with the assessment of persons regarding the subjective probability of suffering a life-threatening COVID-19 disease within the next 12 months (cf. Hertwig et al., 2020).

10 This observation is based on the data of the longitudinal data set, i.e. the mean values in each case refer only to the clubs that participated both in the overall survey in autumn 2020 as part of the 8th wave of the Sport Development Report and in the supplementary survey on COVID-19 in spring 2021. The values for 2020 may therefore deviate from the results of the overall survey, which are published in a separate report, due to the different samples.

Tab. 25: Probability of existential problems due to COVID-19 and their development between autumn 2020 and spring 2021.

	Within the next 12 months (asked in overall survey autumn 2020)	By the end of the year 2021 (asked in COVID-19 supplementary survey)	Index (2020=0)
	Probability of existential threat in % (mean value)		
Financial situation	19.3	14.2	-26.4***
Recruitment / retention of volunteers	29.5	26.4	-8.8***
Recruitment / retention of members	34.7	33.2	-4.2*

Tab. 26: Probability of existential problems due to COVID-19 by the end of 2021, by club size.

Club size	Financial situation	Recruitment / retention of volunteers	Recruitment / retention of members
	Probability of existential threat in % (mean value)		
1-100 members	16.0	26.2	35.9
101-300 members	13.4	26.5	31.1
301-1,000 members	11.2	27.4	30.0
1,001-2,500 members	11.8	24.1	31.5
over 2,500 members	21.0	16.2	33.9

Berlin and Bremen (along with clubs in Schleswig-Holstein) see the lowest average probability of an existential threat in the area of retaining and recruiting volunteers by the end of 2021. The financial situation is rated more threatening by clubs in Brandenburg, Bremen, Thuringia and Saarland than in the other federal states. Clubs in Saarland also fear the greatest existential threat in retaining and recruiting members, followed by clubs in Thuringia and Bremen (cf. Tab. 27).

A further look at the distributions of the assessment of the threat to existence posed by COVID-19 shows that more than half of the sports club in spring 2021 did not expect any problems in the area of the financial situation by the end of 2021, while the shares of clubs that did not expect any threat at all due to COVID-19 were much lower in the areas of retaining and

recruiting volunteers and members, at one third and one quarter respectively. In contrast, around 3 % and 5 % of sports clubs were completely certain that they would face existential problems in the area of retaining and recruiting volunteers and members respectively in the course of 2021 due to the pandemic. This proportion is lower in the financial area, at around 1 % (cf. Fig. 9).

Almost every second sports club (47.4 %) estimated the probability of at least one of the above-mentioned existential problems greater than or equal to 50 %. The problem of retaining and recruiting members contributed significantly to this (37.2 %), while just under 30 % of the clubs considered the probability of an existential problem in the area of volunteers to be probable. The financial threat was classified by around 14 % as a likely existential threat (i.e. $\geq 50\%$) by the end of 2021 (cf. Tab. 28).

Tab. 27: Probability of existential problems due to COVID-19 by the end of 2021, by federal state.

Federal state	Financial situation	Recruitment / retention of volunteers	Recruitment / retention of members
	Probability of existential threat in % (mean value)		
Bavaria	14.3	29.8	37.2
Hamburg	13.6	17.7	29.8
Berlin	9.6	21.6	26.9
Brandenburg	20.8	26.4	32.9
Bremen	19.5	22.2	41.4
Hesse	14.8	27.1	33.4
Mecklenburg-Vorpommern	13.4	26.8	31.0
Lower Saxony	12.9	26.2	32.0
North Rhine-Westphalia	13.7	24.7	32.8
Rhineland-Palatinate	17.0	27.0	31.2
Saxony	13.6	24.9	33.7
Saxony-Anhalt	13.6	28.3	32.1
Thuringia	18.8	34.7	43.3
Baden-Wuerttemberg	13.2	25.3	30.6
Saarland	18.8	31.3	45.0
Schleswig-Holstein	10.1	19.5	24.8

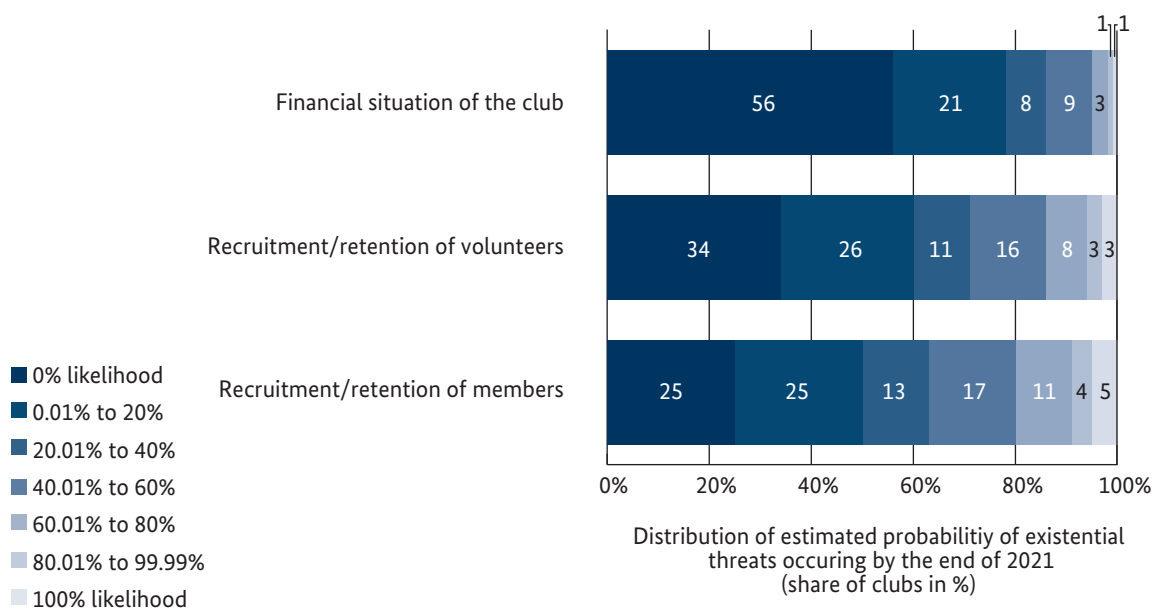


Fig. 9: Distribution of estimated probability of existential threats occurring by the end of 2021 (% of clubs).

Tab. 28: Probability of occurrence of existential problems by the end of 2021 greater than or equal to 50 % (share of clubs in %).

	Probability of occurrence of existential problems greater / equal to 50 % (share of clubs in %)
Financial situation	14.2
Recruitment/retention volunteers	29.5
Recruitment/retention members	37.2
At least one existential problem	47.4

5 Finance



5.1 Membership fees

In addition to the standard revenue and expenditure data collected in the Sport Development Report, the COVID-19 supplementary survey asked clubs about other actions they had taken in the financial area due to the COVID-19 pandemic. For example, clubs were asked if they had accommodated their members' dues during the COVID-19 pandemic. Just under 23 % of the clubs indicated that they had accommodated their members, while approximately 77 % had not made any adjustments to membership fees (cf. Tab. 29).

The proportion of clubs that have accommodated their members tends to increase for larger clubs, with the exception of small clubs with up to 100 members (cf. Tab. 29). The difference in particular between clubs with 101 to 300 members and larger clubs with 1,001 to 2,500 members with regard to accommodating fees is statistically significant, i.e. these larger clubs

have taken such measures more frequently than smaller clubs.

If the size of the municipality is also taken into account at this point, it becomes apparent that the larger the municipality, the more clubs have accommodated their members in terms of membership fees. In particular, there are significant differences between clubs in small municipalities with up to 20,000 inhabitants and clubs in very large municipalities or large cities with more than 500,000 inhabitants (cf. Tab. 30).

When sports clubs have accommodated their members (i.e. those just under 23 % of clubs that indicated this), they have done so primarily by offering the possibility of reducing the fee payments (48.3 %). In addition, around 41 % of these clubs said they had offered their members an option of deferring fee payments (15.1 %) and offsetting the savings against membership dues in the following year (6.4 %). Just under 11 % of the clubs mentioned some other form of concession.

Tab. 29: Proportion of clubs (in %) that have met their members' dues.

	Concession of membership fees (share of clubs in %)
Total	22.7
By club size	
1-100 members	24.0
101-300 members	19.4
301-1,000 members	22.6
1,001-2,500 members	31.7
over 2,500 members	41.6

Tab. 30: Proportion of clubs (in %) that have met their members' dues, by size of the municipality.

Community size	Concession of membership fees (share of clubs in %)
Up to 20,000 inhabitants	19.0
20,001-100,000 inhabitants	24.0
100,001-500,000 inhabitants	25.5
More than 500,000 inhabitants	32.9

5.2 Financial aid measures

5.2.1 Application for financial aid

In order to mitigate the financial consequences of the COVID-19 pandemic, different financial assistance measures were offered to sports clubs. These measures had to be applied for by the clubs. Overall, a good fifth of the clubs applied for financial assistance measures, a further fifth of the clubs had considered applying but ultimately did not apply for any assistance measures, and the majority of clubs, just under 60 %, neither considered nor implemented an application for financial assistance measures (cf. Tab. 31).

Differentiated according to the size of the club, it is evident that larger clubs made far greater use of the application for financial measures than was the case with smaller clubs (cf. Tab. 31). This difference between the club size categories with regard to the application for financial aid is statistically significant.

The analysis by municipality size does not reveal any differences concerning the application for financial aid measures. However, there are differences between the federal states. In Saxony and Saxony-Anhalt, for example, less than or around 10 % of sports clubs have applied for financial assistance measures, whereas in Saarland this applies to around 91 % of the clubs involved (cf. Fig. 10). This result fits in with

the fact that clubs in Saarland rated the probability of a potential threat to their existence in the area of finances comparatively high (cf. Tab. 27). In addition, clubs in Saarland have comparatively frequently used support services from sports federations overall. Only a good third of the clubs in Saarland have not made use of any support services provided by the federations, whereby the survey focused in particular on advisory and information services (cf. Fig. 4).

The clubs that applied for financial measures or were considering applying for them were additionally asked how much effort they estimated it would take to apply for financial aid measures in the context of the COVID-19 pandemic. On a 5-point scale reflecting the size of the effort (1=very small effort; 5=very large effort), the average score was $M=3.52$. That is, overall, the effort was rated as medium to large (cf. Tab. 32). Thus, it can be seen that the effort required to apply for the funds was assessed as high or very high by half of the clubs (cf. Fig. 11).

If the size of the club is also taken into account here, no clear pattern of significant differences emerges. On average, the effort required was estimated to be greatest by large and very large clubs, but small clubs with up to 100 members also estimated the effort to be rather high (cf. Tab. 32). Thus, it cannot be stated generally that the application process was more time-consuming for smaller clubs than for larger ones. It

Tab. 31: Application for financial assistance in the context of the COVID-19 pandemic (share of clubs in %).

	Yes, applied	Considered but ultimately not applied for	No, neither applied nor considered
	Share of clubs (in %)		
Total	20.6	19.5	59.9
By club size			
1-100 members	14.1	17.7	68.2
101-300 members	23.1	19.8	57.1
301-1,000 members	29.8	22.7	47.5
1,001-2,500 members	31.5	24.3	44.2
over 2,500 members	67.9	18.7	13.4

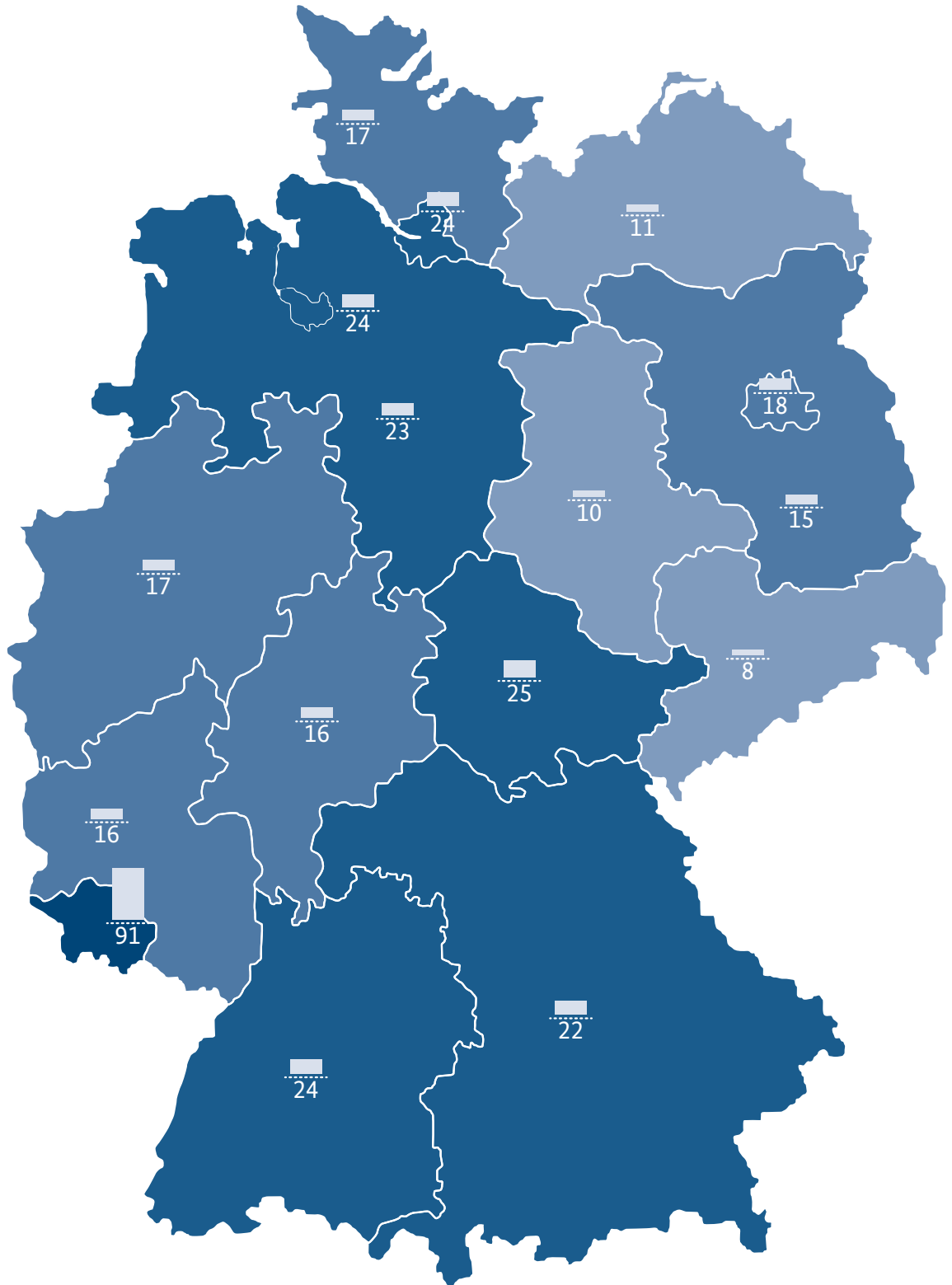


Fig. 10: Application for financial assistance in the context of the COVID-19 pandemic (share of clubs in %).

Tab. 32: Average effort to apply for financial aid (scale from 1=“very small” to 5=“very large”).

Effort to apply for financial aid	
	Mean value
Total	3.52
By club size	
1-100 members	3.56
101-300 members	3.42
301-1,000 members	3.57
1,001-2,500 members	3.64
over 2,500 members	3.73
By application status	
Applied	3.17
Considered, but ultimately not applied for	3.90

should be noted, however, that larger clubs were also more likely to apply for assistance measures, while smaller clubs probably tended to refrain from doing so due to the high estimated effort.

Thus, it can be seen that clubs that assessed the effort required for the application as higher on average ($M=3.90$) ultimately refrained from applying for the funds, while clubs that

actually applied for funds assessed the effort as significantly lower on average ($M=3.17$, cf. Tab. 32). This result becomes particularly clear when looking at the distribution of the clubs' assessment of the effort involved in applying for funds. While around one-third of the clubs that applied for funds estimated the effort involved as high or very high, two-thirds of the clubs that

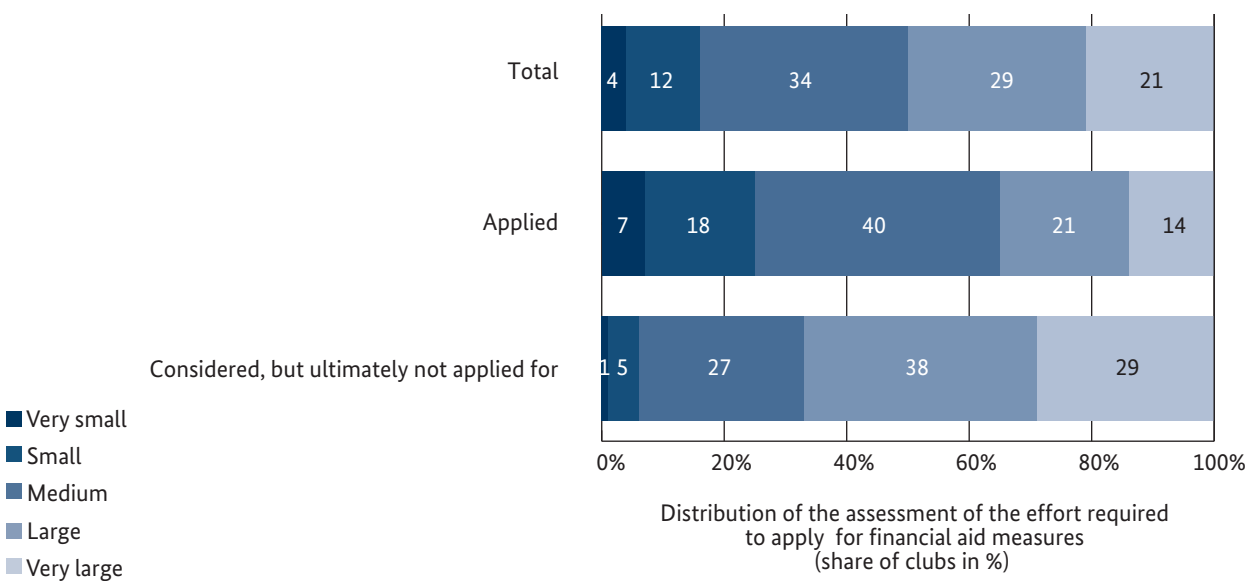


Fig. 11: Distribution of the assessment of the effort required to apply for financial aid measures (share of clubs in %).

had considered applying for funds but ultimately refrained from doing so estimated the effort involved as high or very high (cf. Fig. 11). These clubs were obviously deterred by the high estimated effort of the application.

5.2.2 Type of aid requested

Financial assistance measures could be applied for in various forms, including liquidity assistance from different institutional levels (e.g. from the federal government, the state, the municipality or the state sport confederations) or as short-time working allowance. Of the clubs that applied for financial aid measures, a good two-thirds applied for liquidity assistance. Of these, 5.2 % of applications were for loans, and 90.9 % of applications were non-repayable grants. On average, 2.5 % of the clubs received approval for their loan application, while 67.2 % of the clubs received approval for non-repayable grants (cf. Tab. 33).

If we look at the applications and approvals differentiated according to the size of the club, no significant differences can be seen. However, it is noticeable that the loans, if applied for, were approved 100 % in large clubs with more than 1,000 members, while this was not the case

in smaller clubs (cf. Tab. 33). However, this does not necessarily mean that (not yet) approved applications were necessarily rejected. At the time of the survey, these aid measures had merely not yet been approved.

The proportion of clubs that applied for short-time allowance as a financial assistance measure is significantly lower than for liquidity assistance, at around 10 %. Of the clubs that applied for short-time allowances, 3.5 % applied for a loan, and just under 84 % applied for non-repayable grants. Just under 2 % of clubs received approval for a loan, and just under 78 % received approval for non-repayable grants (cf. Tab. 34).

If we also differentiate here according to the size of the clubs, we find that the proportion of clubs that applied for short-time allowance is much higher among larger clubs than among smaller ones. This difference is statistically significant. However, there are only minor differences in the type of short-time allowance applied for. Thus, for all clubs, the majority applied for short-time allowance as non-repayable grants, while only a few clubs applied for short-time allowance as a loan (cf. Tab. 34). Non-repayable grants tended to be approved more frequently in the area of short-time allowance than was the case with liquidity assistance.

Tab. 33: Proportion of clubs that applied for and received liquidity support in the wake of the COVID-19 pandemic (in %).

Liquidity support	Applied	...of which loans		...of which non-repayable grants	
		Applied	Approved	Applied	Approved
Share of clubs (in %)					
Total	67.3	5,2	2,5	90,9	67,2
By club size					
1-100 members	68.1	5.7	1.1	90.8	65.0
101-300 members	63.6	5.1	2.7	90.2	64.8
301-1,000 members	70.6	4.6	3.0	91.3	72.5
1,001-2,500 members	68.1	3.8	3.8	90.2	58.5
over 2,500 members	67.3	13.5	13.5	100.0	86.9

Tab. 34: Proportion of clubs that applied for and received short-time allowances in the wake of the COVID-19 pandemic (in %).

Short-time allowance	Applied	...of which loans		...of which non-repayable grants	
		Applied	Approved	Applied	Approved
		Share of clubs (in %)			
Total	10.4	3.5	1.5	83.7	77.7
By club size					
1-100 members	3.9	0.0	0.0	84.5	84.5
101-300 members	4.0	8.1	0.0	82.2	82.2
301-1,000 members	15.8	4.7	2.4	79.2	71.9
1,001-2,500 members	35.4	0.0	0.0	81.9	72.2
over 2,500 members	90.9	2.8	2.8	97.2	89.2

Tab. 35: Proportion of clubs that applied for and received other aid measures in the wake of the COVID-19 pandemic (in %).

Other aid measures	Applied	...of which loans		...of which non-repayable grants	
		Applied	Approved	Applied	Approved
		Share of clubs (in %)			
Total	31.5	5.1	1.6	83.3	64.5
By club size					
1-100 members	29.8	4.2	0.0	85.4	66.2
101-300 members	35.5	2.4	1.3	82.2	63.1
301-1,000 members	28.8	8.2	2.8	81.3	63.9
1,001-2,500 members	29.8	12.3	6.2	88.6	68.4
over 2,500 members	31.2	16.1	8.0	83.9	62.9

Just under a third of clubs also stated that they had applied for other aid measures. These mainly included cost reimbursements, funding measures from the state, funding measures from the federal government (e.g. Corona emergency aid) and funding measures from other sponsors (e.g. foundations, banks, lottery). The other aid measures were also predominantly applied for in the form of non-repayable grants (83.3 %) and only rarely in the form of loans (5.1 %). No clear

differences can be identified here when differentiating according to the size of the club (cf. Tab. 35).

Overall, the amount of approved loans per club in 2020 was around € 52,500, and the amount of approved non-repayable grants averaged around € 25,200. However, the mean values listed here may be distorted by outliers (i.e. individual clubs that received much higher loans or non-repayable grants than the average of the clubs). If

we look at the median instead of the mean value¹¹, the amount of approved loans for half of the clubs amount to a maximum of € 13,300 and non-repayable grants to around € 3,000.

5.3 Financial situation

5.3.1 Revenue-expenditure account

The overall financial situation of sports clubs in Germany is reflected in the revenue-expenditure account, which is calculated by subtracting total expenses from total revenue. It can be seen that in the Corona year 2020¹², just under 74 % of sports clubs had at least a balanced revenue-expenditure account (cf. Tab. 36), which means that expenses were covered by revenue or that revenue turned out to be higher than expenses. Compared to the previous year 2019¹³, there are no significant differences, i.e. the overall financial situation of the sports clubs, measured in terms of the revenue-expenditure account, was no worse or better in the Corona year than in the previous year.

If we look at the revenue-expenditure account differentiated by the size of the club, we see that the proportion of clubs with a positive revenue-expenditure account tends to be higher in larger clubs than in smaller ones (cf. Tab. 36). However, this difference is not statistically significant.

5.3.2 Revenue

The highest revenues generated by sports clubs in Germany in the Corona year 2020 came from (1) membership fees, (2) donations, (3) subsidies from the district, city or municipality, (4) subsidies from sports organisations (in this case confederations at regional or local level) and (5) services for members in return for payment (cf. Tab. 37).

Compared to 2019, 2020 showed significant decreases in a variety of revenue categories. The largest percentage decreases were seen in revenue from tombolas, social events, sporting events, and food and beverage sales. Revenues from course fees, merchandising, and self-managed restaurants are also down compared to the

Tab. 36: Revenue-expenditure account of sports clubs in 2020, differentiated by club size.

At least balanced revenue-expenditure account	Share of clubs (in %)
Total	73.6
By club size	
1-100 members	72.2
101-300 members	73.6
301-1,000 members	75.7
1,001-2,500 members	86.6
over 2,500 members	85.9

11 The median is the value below and above which 50 % of the distribution lies. It is less “susceptible to outliers” upwards and downwards than the mean (average).

12 Financial year prior to the COVID-19 supplementary survey.

13 Financial year prior to the overall survey of the 8th wave.

financial year 2019, clearly showing the impact of the interruption in sports and event operations due to the pandemic. On the other hand, some areas also show an increase in individual revenue categories. For example, sports clubs were able to generate more revenue from subsidies from the federal states and from other

funding programmes than in 2019. Thus, subsidies in these two areas increased significantly during the COVID-19 pandemic. Overall, however, the total revenue generated by clubs shows a decrease of about -22 % compared to 2019 (cf. Tab. 37).

Tab. 37: Revenues of sports clubs in 2020 and their evolution compared to 2019.

Revenue from	Mean value (in €)	Index mean (2019=0)	Share of clubs that have revenue (in %)
Membership fees	18,311		100.0
Donations	3,405		68.2
Subsidies from the district/city/municipality	2,281		49.6
Subsidies from sports organisations: confederations at regional or local level	1,599		49.3
Services for members for payments (rental of pitch, hall or similar)	1,094		8.6
Subsidies from the federal state	1,047	+73.0*	21.6
Advertising contracts for perimeter boards	944		16.6
Course fees	976	-48.5***	14.7
Self-managed restaurant	760	-55.0***	11.9
Services from leasing/rental of club-owned facilities	699		10.9
Services for non-members for payment (rental of pitch, hall or similar)	458		8.4
Advertising for jersey, equipment	391		6.0
Sporting events (admission fees, etc.)	387	-80.1***	17.1
Reimbursements/subsidies from health insurance companies	370	-44.9***	4.8
Subsidies from sports organisations: federations	359		16.3
Credits	358	-49.0*	1.4
Sales of food and beverages (e.g. at sports festivals, Christmas markets)	310	-79.6***	13.7
Advertising contracts for displays/ads	248	-34.9***	7.3
Services for cooperation partners for remuneration	228		2.6
Social events (e.g. club ball, carnival event)	223	-85.8*	7.8
Subsidies from other support programmes (e.g. employment office)	217	+135.5*	3.2
Admission fees	198		21.3
Asset management (e.g. interest income)	182		6.6
Subsidies from the friends' association	167	-38.5*	4.4

Revenue from	Mean value (in €)	Index mean (2019=0)	Share of clubs that have revenue (in %)
Business operations	112		0.6
Sale of sportswear and sports or fan articles (e.g. merchandising)	60	-48.8***	5.3
Subsidies from the European Union (e.g. EU Structural Funds, Erasmus+ for education, youth and sport)	49		0.8
Waste material collections (e.g. waste paper)	32	-32.8*	2.3
Advertising contracts for broadcasting rights	14		0.3
Tombolas (e.g. lottery ticket sales)	10	-86.3***	1.0
Other ¹⁴	1,338		13.7
Total revenue	36,827	-21.8**	100.0

5.3.3 Expenditure

Let's look at the expenditure of sports clubs in the Corona year 2020, differentiated by individual expenditure categories. We see that clubs in Germany continued to spend the most on average on (1) coaches, trainers and sports teachers, followed by (2) expenditure on the

maintenance and operation of their own facilities, (3) expenditure on administrative staff, (4) rents and reimbursements of costs for the use of sports facilities not owned by the club, and (5) sports equipment and sportswear (cf. Tab. 38).

Tab. 38: Expenditure of sports clubs in 2020 and their evolution compared to 2019.

Expenditure for	Mean value (in €)	Index mean (2019=0)	Share of clubs that have expenses (in %)
Coaches, trainers, sports teachers	6,709	-27.1***	61.6
Maintenance and operation of own facilities	5,176		48.5
Administrative staff	2,252		11.5
Rent and reimbursement of costs for the use of sports facilities not belonging to the club	1,939		44.9
Sports equipment and sportswear	1,932	-31.9***	50.4
Interest payments (interest, repayments)	1,188		12.6
Membership fees to sports organisations: federations	1,159		74.6
Maintenance personnel, groundskeeper, etc.	1,147		18.5
Insurance	1,116		72.9
Accruals	1,086		13.2
Purchase of goods	1,078	-55.3**	30.8

¹⁴ Among other things, income from performances, sales, events, reimbursements from work not performed and photovoltaics (electricity generation) were mentioned here.

Expenditure for	Mean value (in €)	Index mean (2019=0)	Share of clubs that have expenses (in %)
Membership fees to sports organisations: confederations at regional and local level	1,075		78.2
General and administrative expenses	915		55.7
All kinds of taxes	705		26.4
Travel expenses for training and competitions	454	-64.8***	18.6
Payments to athletes	426	-42.4***	3.3
Organisation of own sports events	409	-75.2***	18.8
Tax consultant, auditor, notary public; Entries in the register of clubs	392		26.6
Entry fees/registration fees	271	-57.5***	35.7
Game permissions/passes/licenses	263		32.8
Referees/officials expenses	249	-52.1***	17.9
Honours/gifts/anniversaries (e.g. certificates, trophies, pins of honour)	240	-36.9***	46.7
Non-sporting events (e.g. festivals)	178		13.7
Advertising/advertising measures	136	-41.3*	12.5
Gema fees	39		17.1
Fines/penalties	31	-57.7***	10.2
Tombolas (e.g. lottery tickets, prizes)	5	-86.8*	1.2
Other ¹⁵	1,742		17.5
Total expenditure	32,312	-24.9***	100.0

Compared to the last club survey, which asked clubs about their spending in 2019, i.e. before the pandemic, club spending fell in many areas during the pandemic. The largest percentage decreases were seen in spending on tombolas, spending on staging sporting events, travel expenses, regulatory fees and entry/registration fees. In addition, expenses for referees and officials declined, as did expenses for sports equipment and clothing, the purchase of goods, payments to athletes, and expenses for coaches and trainers. Overall, the total expenditure of clubs is also down compared to the 2019 financial year, by around -25 %. This means that expenditure has fallen slightly more in relation to income.

Therefore, it can be seen that the pandemic not only caused various revenues to shrink but also reduced expenditure (cf. Tab 38). For this reason, it seems plausible that the clubs did not consider the club's financial situation to be the most severe problem (cf. sections 4.2 and 4.4).

5.3.4 Assets and liabilities

In addition to revenue and expenses, the clubs were asked about the value of their assets and debt at the end of 2020. On average, sports clubs in Germany had assets worth around € 95,700 (median= € 14,000), while the average debt level was around € 12,700 (median= € 0). Compared

15 Among other things, expenses for material procurement, training, operating costs, maintenance, building costs, repayments and costs for the homepage were mentioned here.

Tab. 39: Total assets and liabilities at the end of 2020.

	Assets		Liabilities	
	Mean value (in €)	Median (in €)	Mean value (in €)	Median (in €)
Total	95,710	14,000	12,700	0
By club size				
1-100 members	31,830	6,000	1,760	0
101-300 members	80,240	20,000	8,110	0
301-1,000 members	198,120	52,000	34,340	0
1,001-2,500 members	570,220	216,740	95,420	0
over 2,500 members	2,087,610	595,960	258,630	8,000

to 2019, there have been no significant changes in either assets or liabilities (cf. Tab. 39), i.e. here, too, the clubs are financially stable.

If we look at the average amount of assets and liabilities differentiated by club size, we find that larger clubs unsurprisingly have higher assets than smaller clubs (cf. Tab. 39). This difference is statistically significant. However, the debt level also rises with increasing club size, and these differences between the size classes are also statistically significant.

5.3.5 Investments

The amount of material goods and services procured, i.e. the investments made by the clubs in 2020, averaged around € 6,400. However, half of the clubs only invested a maximum of € 50. Compared to 2019, no significant changes can be

seen. As with assets and liabilities, the evaluation by club size shows that larger clubs made significantly higher investments than smaller clubs (cf. Tab. 40).

5.3.6 Reserves

To make future investments or carry out maintenance work, for example, clubs can form reserves to a limited extent. In the 2020 financial year, the free reserves of the clubs averaged around € 8,300, while the earmarked reserves were around € 7,400. There were no significant changes here compared to 2019 (cf. Tab. 41).

Differentiated according to the size of the club, it is again evident that the reserves (both free and earmarked) are higher as the size of the club increases (cf. Tab. 41). This difference between the club sizes is statistically significant.

Tab. 40: Level of goods and services procured in 2020.

	Investments	
	Mean value (in €)	Median (in €)
Total	6,420	50
By club size		
1-100 members	1,720	0
101-300 members	6,200	500
301-1,000 members	15,280	2,000
1,001-2,500 members	32,680	7,580
over 2,500 members	58,730	26,530

Tab. 41: Level of free reserves and earmarked reserves in 2020.

	Free reserves		Earmarked reserves	
	Mean value (in €)	Median (in €)	Mean value (in €)	Median (in €)
Total	8,330	2,000	7,350	0
By club size				
1-100 members	3,710	900	3,040	0
101-300 members	8,680	3,000	5,560	0
301-1,000 members	15,870	6,030	14,120	3,000
1,001-2,500 members	37,070	23,590	34,840	15,210
over 2,500 members	69,910	34,760	160,420	109,340

6 Conclusion



The data from the Sport Development Report show that sports clubs in Germany were affected by the COVID-19 pandemic primarily in their membership base. It is evident here that larger clubs, in particular, were affected by greater declines in membership. Overall, the development in membership numbers (-3.3 %) mirrors almost exactly the decline in members (-3.5 %) reported in the DOSB annual survey, which underpins the quality of the data.

The effects of the pandemic are less strongly felt in the number of people in board positions and among volunteer coaches and trainers. Here, the vast majority of clubs stated that the number had remained unchanged within the year 2020. The number of people involved in the clubs as referees and officials has also remained largely stable over the course of the pandemic. The fact that clubs were more affected by declines in membership than declines in volunteers is also reflected in clubs' perception of problems. Thus, compared to the last club survey in autumn 2020, the problem pressure in the area of membership has increased in the current survey in spring 2021, while problems in the areas of retaining and recruiting volunteer functionaries as well as coaches and trainers have decreased in the same period. Thus, it is shown that a long-standing trend seems to have been interrupted, and there is a shift in problems. In the previous waves of the Sport Development Report, for example, voluntary work problems were always rated most highly by the clubs, whereas clubs now see the greatest problems on average in the area of retaining and recruiting members. Here, then, the pandemic has obviously led to a change in the most serious challenges facing clubs. It should be noted, however, that due to the timeframe of the survey, it is not yet possible to tell whether this trend is sustainable or more short-term. While coaches and trainers, in particular, were needed rarely or not at all due to the interruption of sports activities, many members left the clubs at the same time. Thus, the clubs' perception of the problem may possibly also be due to the timing of the

survey. Thus, a more accurate assessment of the problems can only be evaluated after the return to normal sporting operations.

In order to counteract the decline in membership and to be able to maintain the range of sports on offer to a minimal extent despite the lockdown, the clubs increasingly relied on digital substitute offers and the use of outdoor activities during the pandemic. These were implemented primarily by larger clubs and increasingly during the second lockdown. In addition, clubs implemented other measures, particularly in the area of digitalisation and more intensive communication with members. The clubs took advantage of support services from the federations, primarily in the form of consulting and information services.

Financially, the clubs have so far been rather moderately affected by the pandemic. The financial problems and the expectation of existential problems due to the pandemic by the end of 2021 are, on average, rather low in the financial sphere, and initial fears in the organised sport of a crisis potentially threatening the existence of clubs due to the financial situation of clubs triggered by the pandemic cannot be confirmed for the time being. One reason for this could be the financial aid measures set up in the context of the pandemic. The data from the Sport Development Report show that around one in five clubs applied for financial assistance measures, with the proportion being much higher among large sports clubs with more than 2,500 members, at over two-thirds. Applications were mainly for liquidity assistance, less for short-time allowance or other assistance. Therefore, the financial aid measures could be one reason why the proportion of clubs with a positive balance sheet has remained unchanged compared to the time before the pandemic. In addition, there were not only decreases in the individual revenue categories but also the expenses of the clubs in 2020 were lower due to the pandemic. Proportionally, expenditure actually fell more sharply than revenue.

All in all, the data of the Sport Development Report show that the clubs have come

through the pandemic relatively well to date. However, it is also apparent that the situation varies greatly depending on the size of the club. In addition, many clubs feel that there is a lack of support from politics and administration and that the bureaucratic burden remains high. For a

final evaluation of the consequences of the COVID-19 pandemic, future studies are also necessary to record the long-term effects on the sports clubs. Here, the club survey of the ninth wave of the Sport Development Report, which will start in autumn 2023, will provide information.

7 Method



7.1 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 Sports (FISAS) with the aim of providing decision-makers in organised sport and in public sports policy and administration with timely information relevant to policy fields and management (argumentation and know-how). With the help of this support, the competitiveness of organised sport is to be strengthened in times of dynamic social change. The project is funded by the 16 federal state sport confederations, the German Olympic Sports Confederation (DOSB) and the Federal Institute of Sport Science (BISp)¹⁶. 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 (“SEB 3.0”). Furthermore, the methodological core idea of the Sport Development Report lies in the establishment of a panel design. Therefore, from the seventh wave onwards, the same sports clubs are surveyed every three years about their situation.

7.2 Sampling and response

As with the first seven waves, an online survey was used as the method for the overall club survey of the eighth wave. The eighth wave club survey, i.e. the scheduled survey, was carried out from 21.10.2020 to 21.12.2020. The email addresses of the clubs provided by the state sport confederations served as the basis for the sample. Of the total 88,071 sports clubs in Germany on the cut-off date of 01.01.2020 (DOSB, 2020), a good 78,350 email addresses were submitted. A total of 78,353 sports clubs were invited to participate in the survey by email. The sample was adjusted for those clubs that were unable to participate in the survey for various reasons. The majority of these sample failures (3,283) were due to incorrect email addresses and cancellations. In total, $n=20,179$ interviews could be realised, which corresponds to a response rate of 26.9 % (cf. Tab. 42). Compared to the seventh wave¹⁷, the sample size has increased slightly nationwide (+1.5 %).

The data basis for this report is essentially the supplementary survey on COVID-19. This supplementary survey of sports clubs was also conducted online from 08.04.2021 to 08.06.2021.

Tab. 42: Field overview of the overall club survey of the Sport Development Report 2020-2022 for Germany (wave 8).

Club survey 8th wave Sport Development Report 2020-2022	N	Share of Sample I (in %)	Share of Sample II (in %)
Population (reference date 01.01.2020)	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

¹⁶ Reference number ZMVI4-081802/17-26.

¹⁷ The response for the 2017/2018 Sport Development Report was $n=19,889$.

Tab. 43: Field overview of the COVID-19 supplementary survey of the Sport Development Report.

COVID-19-supplementary survey	N	Share of Sample I (in %)	Share of Sample II (in %)
Population (reference date 01.01.2021)	87,600		
Sample I (invited clubs)	7,161	100.0	
Incorrect email addresses, person no longer active in the club, club no long-er exists/ disbanding, refusals	94		
Adjusted Sample II	7,067		100.0
Interviews taken place	3,895		
Participation (in %)	4.4	54.4	55.1

A reminder was sent out on 11.05.2021. Clubs that had already taken part in the overall club survey of wave 8 in autumn 2020 and had agreed to take part in the supplementary survey were able to participate on a voluntary basis. This applied to 7,161 clubs of the 20,179 participating clubs in wave 8.

In relation to the basic population of sports clubs on the cut-off date of 01.01.2021 (DOSB, 2021), this was 4.4 % of sports clubs in Germany. A total of $n=3,895$ sports clubs participated in the COVID-19 supplementary survey, which corresponds to a response rate of around 55 % (cf. Tab. 43).

Tab. 44: Participation of sports clubs in the COVID-19 supplementary survey of the Sport Development Report by federal state.

Federal State	Number of participating clubs in the COVID-19 supplementary survey	Participation (percentage of sample II)
Bavaria	540	55.2
Hamburg	51	60.7
Berlin	94	57.0
Brandenburg	86	52.1
Bremen	19	63.3
Hesse	422	59.5
Mecklenburg-Vorpommern	75	48.7
Lower Saxony	448	53.5
North Rhine-Westphalia	691	58.7
Rhineland-Palatinate	312	55.5
Saxony	186	51.8
Saxony-Anhalt	108	52.7
Thuringia	112	43.8
Baden-Wuerttemberg	524	54.5
Saarland	97	51.6
Schleswig-Holstein	130	55.3
Total	3,895	55.1

An overview of the participation of sports clubs in the COVID-19 supplementary survey, differentiated by federal state, can be found in Tab. 44. In absolute terms, most participating clubs come from North Rhine-Westphalia, Bavaria and Baden-Wuerttemberg, i.e. also from the federal states with the most clubs. In relation to the adjusted sample II, participation is highest in the two city states of Bremen and Hamburg, each with over 60 %.

If we look at the participation of sports clubs differentiated by the size of the municipality in which the respective clubs are located, it is clear that just under half of the clubs are located in small municipalities with up to 20,000 inhabitants. Just under a third are from municipalities with 20,001 to 100,000 inhabitants, while around 13 % are from municipalities with 100,001 to 500,000 inhabitants. A good one in ten participating clubs is located in very large municipalities or large cities with more than 500,000 inhabitants (cf. Fig. 12).

7.3 Weights

The analysis of the sample of the COVID-19 supplementary survey was carried out with weighted values in order to represent the population of sports clubs in Germany as representatively as possible. For this purpose, size categories were formed on the basis of membership numbers both in the data of the basic population of clubs and in the sample of clubs surveyed. In total, the clubs were divided into 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). Subsequently, the distribution of clubs by size class was determined in both data sets (population and sample). In this procedure, a distinction was made by state sport confederation. For each individual case, a weighting factor was then determined on the basis of the distribution of size categories in the population of the respective federal state and the sample, with which the sample was subsequently weighted for the final analysis.

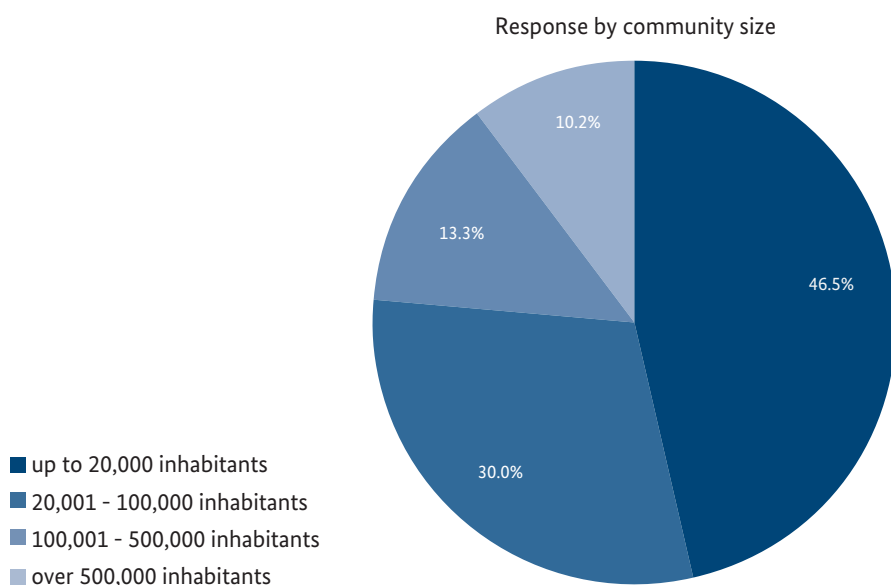


Fig. 12: Distribution of participating sports clubs by the size of the municipality (share of clubs in %).

7.4 Data analysis of financial data

The evaluations in chapter 5.3 of this report are based on the financial data provided by the sports clubs. First and foremost, it should be noted that the financial data refers to the financial year prior to the survey. Consequently, the financial data of the COVID-19 supplementary survey of the Sport Development Report refer to the year 2020, i.e. the year in which the COVID-19 pandemic began.

As known from previous surveys, the evaluation of the financial data revealed quality problems in part of the sample. In some cases, financial data of an incomprehensible magnitude were provided. This applies to both the revenue and the expenditure side. For this reason, a financial filter was used for the analysis of club finances, as in the previous waves of the Sport Development Report. In order to obtain financial values that are as reliable as possible, the following quality criteria were subsequently assumed

- (1) Revenue from membership fees > (number of members * € 0.50),
- (2) $4 > \text{revenue} / \text{expenditure} > 0.25$.

Furthermore, in the data of the COVID-19 supplementary survey, $n=6$ outliers were deprived of the quality of the information regarding the club finances. This quality filter made it possible to significantly narrow down the spread of financial data in the COVID-19 supplementary survey. Overall, 94.7 % of the clubs that provided information on club finances in the COVID-19 supplementary survey meet these quality criteria.

All evaluations of club finances refer only to those clubs that meet these quality criteria.

7.5 Longitudinal data set and index formation

The analyses in this report are based on the sample of the COVID-19 supplementary survey of the clubs. However, the data set of the COVID-19 supplementary survey was linked with the data set of the 8th wave in order to be able to present developments for the participating clubs for selected questions. In this report, for example, developments in the areas of personnel, problems and finances of the clubs are presented on the basis of the longitudinal section between the data of the overall club survey and the supplementary survey. For the construction of the longitudinal data set, the unchangeable club number (ID) assigned to the clubs was used.

The extent of the changes is illustrated with the help of indices that reflect the percentage change. The basis for calculating the indices is the value determined in the longitudinal data set for the initial year (in this case the overall club survey of wave 8). For example, an index of +12 means that said value has increased by 12 %. In the tables and figures, the baseline year (survey year) is marked "Index (2020=0)". The exception here is the section on finances, where the trend refers to the baseline year 2019 (financial year) and is marked with "Index (2019=0)".

With regard to the level of the indices, it should be noted that the indices can be high

Tab. 45: Overview of error probabilities.

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

even in the case of 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 (signifi-

cance test: t-test). In this report, only the significant index changes are presented. The level of the error probability, which is decisive for the determination of significance, is illustrated with the usual labelling (cf. Tab. 45).

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Appendix: Questionnaire



Supplementary survey 2021: COVID-19

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General questions

1. How many members joined your club in 2020?

Number

 Number of entries total:

 of which children and adolescents up to and including the age of 18 :

 of which seniors over 60 years:

2. How many members left your club in 2020?

Number

 Number of resignations total:

 of which children and adolescents up to and including the age of 18:

 of which seniors over 60 years:

3. How many members join your club in a normal year?

Number

 Average number of entries total:

 of which on average children and adolescents up to and including the age of 18:

 of which on average seniors over 60 years:

4. How many members leave your club in a normal year?

Number

Average number of resignations total:

of which on average children and adolescents up to and including the age of 18:

of which on average seniors over 60 years:

5. Has the number of people serving in board positions (including departmental boards) changed between 01.01.2020 and 31.12.2020?

- No, the number of people serving in board functions remained exactly the same in 2020.
- Yes, the number of people serving in board functions increased in 2020.
It has grown by _____ persons.
- Yes, the number of people serving in board functions decreased in 2020.
It has fallen by _____ persons.

6. Has the number of people serving as volunteer coaches and trainers changed between 01.01.2020 and 31.12.2020?

- No, the number of people serving as volunteer coaches and trainers remained exactly the same in 2020.
- Yes, the number of people serving as volunteer coaches and trainers increased in 2020.
It has grown by _____ persons.
- Yes, the number of people serving as volunteer coaches and trainers decreased in 2020.
It has fallen by _____ persons.

7. Has the number of referees and officials changed between 01.01.2020 and 31.12.2020?

- No, the number of referees and officials remained exactly the same in 2020.
- Yes, the number of referees and officials increased in 2020.
It has grown by _____ persons.
- Yes, the number of referees and officials decreased in 2020.
It has fallen by _____ persons.
- We had no referees and officials in 2020.

8. Has the number of paid staff changed between 01.01.2020 and 31.12.2020?

No, the number of paid staff remained exactly the same in 2020.

Yes, the number of paid staff increased in 2020.
It has grown by _____ persons.

Yes, the number of paid staff decreased in 2020.
It has fallen by _____ persons.

We had no paid staff in 2020.

9. Please estimate what percentage of your club's sports offerings have been replaced by digital substitutes in the 1st lockdown. %

Please enter a percentage value between 0 and 100.

10. Please estimate what percentage of your club's sports offerings have been replaced by digital substitutes in the 2nd lockdown. %

Please enter a percentage value between 0 and 100.

11. Please estimate what percentage of your club's sports offerings have been replaced by outdoor sports activities (e.g. use of open spaces instead of indoor facilities). %

Please enter a percentage value between 0 and 100.

12. Has the frequency of board meetings changed in the 1st lockdown compared to the time before?

yes no

Filter: if yes:

12a. Please indicate how the frequency of board meetings changed in the 1st lockdown:

The board met:

much rarer rarer more often much more often

13. Did the frequency of board meetings change in the 2nd lockdown compared to the 1st lockdown?

yes no

Filter: if yes:

13a. Please indicate how the frequency of board meetings changed in the 2nd lockdown:

The board met:

much rarer rarer more often much more often

14. Was an annual general meeting held in 2020 (also in digital form, if applicable)?

yes no

Filter: if yes (for 14a and 14b):

14a: In what form was the 2020 annual general meeting held?

in presence

digital

by circulation

in a mixed for (e.g. presence and digital)

in other form. Please indicate:

14b. How many members attended the annual general meeting in 2020?

Number of members:

15. Were any social events (incl. digital, if applicable) held at your club in 2020?

yes no

Filter: if yes (for 15a and 15b):

15a. In what form were social events held in 2020? (Multiple answers possible)

in presence digital

15b. Please estimate what percentage of your club's members participated in social events at your club in 2020. %

Please enter a percentage value between 0 and 100. approx.

16. In the wake of the COVID-19 pandemic, has your club implemented any of the following?

	Implemented/ in implementation	Planned	Not planned
(Greater) digitalisation of club management (e.g. booking systems, club management, communication)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More intensive communication with members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New ways of developing financial sources (e.g. fundraising)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Formation of reserves (free and/or earmarked)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Modernization/refurbishment/construction of club-owned sports facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**17. Did your club make use of support services of measures from sports federations in 2020?
(Multiple answers possible)**

<input type="checkbox"/>	Yes, counselling/information on financial assistance services related to COVID-19
<input type="checkbox"/>	Yes, counselling/information on the implementation of (sports) offers under pandemic conditions.
<input type="checkbox"/>	Yes, counselling/information on legal issues of club management related to COVID-19 (e.g. annual general meetings)
<input type="checkbox"/>	Yes, participation in digital education activities in the area of sports practice.
<input type="checkbox"/>	Yes, participation in digital education activities in the area of club management.
<input type="checkbox"/>	Yes, special funding programs related to COVID-19 (e.g. for creating digital sport programmes).
<input type="checkbox"/>	Yes, others (please indicate):
<input type="checkbox"/>	No, our club did not use any support services from sports federations in 2020.

Club problems

18. How big are the following problems of your club at the moment?

Filter: if very big problem:

18a. You have indicated that the problems listed below are very big problems for your clubs. Please also mark the respective answer option here if this very big problem threatens the existence of your club. (Multiple answers possible)

	This is in our club ...					and the problem threatens existence
	no problem	a small problem	a medium problem	a big problem	a very big problem	
Recruitment/ retention of members	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identification of members with the club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recruitment/ retention of volunteer functionaries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recruitment/ retention of coaches and trainers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recruitment/ retention of referees and officials	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial situation of your club	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Number of laws, orders, regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Skills in the area of internet and social media	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The support of politics and administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

19. What do you think the likelihood is that your club will face existence-threatening problems in the listed areas due to the COVID-19 pandemic by the end of 2021?

Note: Please enter a percentage value between 0 and 100. 0 means „not at all likely“, 100 means „absolutely likely“. You can use percentages in between to grade.

Likelihood of existence-threatening problems in the areas of:

Financial situation of the club %

Recruitment/ retention of volunteers %

Recruitment/ retention of members %

Finance

20. Due to the suspension of sports operations due to the COVID-19 pandemic, has your club accommodated members on dues?

yes

no

Filter: **if yes:**

**20a. In what way has your club accommodated members in terms of dues?
(Multiple answers possible)**

Through the possibility of suspending/ refunding the payment of membership fees.

Through the possibility of deferral/ postponement of payment of membership fees.

Through the possibility of reducing the payment of membership fees.

By offsetting the savings (e.g. in the area of sports facilities and coaches) against the membership fee in the following year.

Through the following other measures: Please indicate:

21. Has your club applied for or considered applying for financial assistance measures for sports clubs in 2020 as part of the COVID-19 pandemic?

Yes, applied.

Considered, but in the end not applied.

No, neither considered nor applied.

Filter: if „Yes, applied“ OR „Considered, but in the end not applied“:

21a: How much effort do you think it takes to apply for assistance for sports clubs in the context of the COVID-19 pandemic? Please estimate the size of the effort from „very small“ to „very large“.

	very small	small	medium	large	very large
	--	-	+/-	+	++
The effort to apply for financial assistance for sports clubs in the COVID-19 pandemic is...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Filter: if „Yes, applied“ in 21:

21b. What financial aid measures has your club applied for in the context of the COVID-19 pandemic?

If applied: Please differentiate here between loans and non-repayable grants. Please also indicate whether the measures applied for were approved in each case. (Multiple answers possible)

Financial support	Applied	Filter: if applied			
		Loans applied	Non-repayable grants applied	Loans applied	Non-repayable grants applied
Liquidity support (e.g. federal state, state, municipality, state sports confederation)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Short-time allowance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other: please indicate:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Filter: if in 21b at least one aid measure (loans and/or non-repayable grants) were approved, in each case:

21c. What was the total amount of aid approved in 2020?

Loans:	€
Non-repayable grants:	€

Now we ask you to provide information about the financial resources that were available to you in the financial year 2020 as well as information about the expenses of your club in the financial year 2020.

22. What was the total revenue of your club in the financial year 2020? €

23. What was the total expenditure of your club in the financial year 2020? €

**24. Please indicate in which of the following categories you had revenue in the financial year 2020.
(Multiple answers possible)**

Filter: if available: 24a. Please now provide detailed information on the amount of the revenue categories you named in the financial year 2020. Please enter whole numbers only.

Revenue from...	available	If available: Amount in €
1. Membership fees	<input type="checkbox"/>	
2. Admission fees	<input type="checkbox"/>	
3. Donations	<input type="checkbox"/>	
4. Subsidies	XXXXX	XXXXX
- from sports organisations: confederations at regional or local level	<input type="checkbox"/>	
- from sports organisations: federations	<input type="checkbox"/>	
- from the federal state	<input type="checkbox"/>	
- from the district/city/municipality	<input type="checkbox"/>	
- from the European Union (e.g. EU Structural Funds, Erasmus+ for education, youth and sport)	<input type="checkbox"/>	
- from the friends' association	<input type="checkbox"/>	
- from other support programmes (e.g. employment office)	<input type="checkbox"/>	
5. Course fees	<input type="checkbox"/>	
6. Asset management (e.g. interest income)	<input type="checkbox"/>	
7. Self-managed restaurant	<input type="checkbox"/>	
8. Sports events (entrance fees etc.)	<input type="checkbox"/>	
9. Services for members for payment (rental of pitch, hall or similar)	<input type="checkbox"/>	
10. Social events (e.g. club ball, carnival event)	<input type="checkbox"/>	
11. Sale of food and beverages (e.g. at sports festivals, Christmas markets)	<input type="checkbox"/>	
12. Tombolas (e.g. lottery ticket sales)	<input type="checkbox"/>	
13. Waste material collections (e.g. waste paper)	<input type="checkbox"/>	
14. Sale of sportswear and sports or fan articles (e.g. merchandising)	<input type="checkbox"/>	
15. Advertising contracts for:	XXXXX	XXXXX
- jersey, equipment	<input type="checkbox"/>	

Revenue from...	available	If available: Amount in €
- perimeter boards	<input type="checkbox"/>	
- broadcasting rights	<input type="checkbox"/>	
- display/ads	<input type="checkbox"/>	
16. Business operations	<input type="checkbox"/>	
17. Services for non-members for payment (rental of pitch, hall or similar)	<input type="checkbox"/>	
18. Services for cooperation partners for remuneration	<input type="checkbox"/>	
19. Services from leasing/rental of club-owned facilities	<input type="checkbox"/>	
20. Credits	<input type="checkbox"/>	
21. Reimbursements/subsidies from health insurance companies	<input type="checkbox"/>	
22. Other (please indicate): _____	<input type="checkbox"/>	
Other (please indicate): _____	<input type="checkbox"/>	
Other (please indicate): _____	<input type="checkbox"/>	

25. Please indicate in which of the following categories you had expenditures in the financial year 2020. (Multiple answers possible)

Filter: **if available: 25a. Please now provide detailed information on the amount of the expenditure categories you named in the financial year 2020. Please enter whole numbers only.**

Expenditure for...	available	If available: Amount in €
1. Personnel expenditures	XXXX	XXXXXX
- Administrative staff	<input type="checkbox"/>	
- Coaches, trainers, sports teachers	<input type="checkbox"/>	
- Payments to athletes	<input type="checkbox"/>	
- Maintenance personnel, groundskeeper, etc.	<input type="checkbox"/>	
2. Expenditure for sports operations	XXXX	XXXXXX
- Sports equipment and sports wear	<input type="checkbox"/>	

Expenditure for...	available	If available: Amount in €
- Maintenance and operation of own facilities	<input type="checkbox"/>	
- Rent and reimbursements of costs for the use of sports facilities not belonging to the club	<input type="checkbox"/>	
- Travel expenses for training and competitions	<input type="checkbox"/>	
- Organisation of own sports events	<input type="checkbox"/>	
- Entry fees/registration fees	<input type="checkbox"/>	
- Referees/officials expenses	<input type="checkbox"/>	
- Game permissions/passes/licenses	<input type="checkbox"/>	
3. Fees/ taxes:	XXXX	XXXXX
- Membership fees to sport organisations: confederations at regional and local level	<input type="checkbox"/>	
- Membership fees to sport organisations: federations	<input type="checkbox"/>	
- All kinds of taxes	<input type="checkbox"/>	
- Gema fees	<input type="checkbox"/>	
- Fines/penalties	<input type="checkbox"/>	
4. General expenditures:	XXXX	XXXXX
- General and administrative expenses	<input type="checkbox"/>	
- Insurance	<input type="checkbox"/>	
- Non-sporting events (e.g. festivals)	<input type="checkbox"/>	
- Honours/gifts/anniversaries (e.g. certificates, trophies, pins of honour)	<input type="checkbox"/>	
- Tombolas (e.g. lottery tickets, prizes)	<input type="checkbox"/>	
- Tax consultant, auditor, notary public; Entries in the register of clubs	<input type="checkbox"/>	
- Purchase of goods	<input type="checkbox"/>	
5. Advertising/advertising measures	<input type="checkbox"/>	
6. Interest payments (interest, repayments)	<input type="checkbox"/>	
7. Accruals	<input type="checkbox"/>	
8. Other (please indicate): _____	<input type="checkbox"/>	
Other (please indicate): _____	<input type="checkbox"/>	

Expenditure for...	available	If available: Amount in €
Other (please indicate): _____	<input type="checkbox"/>	

26. What were the total assets of your club at the end of 2020?

(Assets = total of assets such as land, sports facilities, sports equipment, bank assets, cash assets, etc.).
If you keep an inventory, enter the total kept here.

€

27. What were the total liabilities of your club at the end of 2020?

(Liabilities = total of liabilities such as bank liabilities, trade payable, etc.). If you keep an inventory, enter the total kept here. If your club had not liabilities, please enter 0 (zero).

€

28. What was the total amount of procured tangible goods or services in the financial year 2020, the benefits of which will accrue to the club over several years (=investments)?

(The investment area includes both tangible investments such as sports facilities and sports equipment, the IT infrastructure and intangible investments such as further trainings and consulting services). If your clubs has not made any investments, please enter 0 (zero).

€

29. What were your club's free and earmarked reserves in the financial year 2020?

Amount of free reserves: €

Amount of earmarked reserves: €

Closing

30. Who in your club mainly answered this questionnaire? (Multiple answers possible)

- Board members
-
- Paid staff member
-
- Voluntary staff member, who does not belong to the board
-
- Other person
-

31. Were you involved in answering the overall club survey in autumn 2020 as part of the Sport Development Report?

- Yes, I answered the club survey in autumn 2020 by myself.
-
- Yes, I answered the club survey in autumn 2020 together with fellow club members.
-
- No, I was not involved in answering the club survey in autumn 2020.
-

At this point, you have the opportunity to make further comments about your clubs and the survey:

Thank you very much for your participation!

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