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Sport Development
Report 2015/2016

Analysis of the situation
of sports clubs
in Germany

Abbreviated Version

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Sports clubs in Germany

1 Summary

Sports clubs in Germany still prove to be well adaptable elements of stability in a rapidly changing society. The results of the recent edition of the Sport Development Report show that sports clubs are improving in handling demographic changes as well as the effects of all-day schools and 8-year academic high schools (G8) on the available time for training and practice compared to previous years. Furthermore, clubs have a clearer perspective for their future development. At least 29 % of clubs show commitment for refugees, 35 % offer sports for people with disabilities, and 52 % are committed to the prevention of sexual violence in sports. At the same time, the intention of sports clubs in Germany to offer a public welfare-oriented sports supply keeps stable. Amid the variety of club objectives, particular importance is placed upon transmitting values such as fair play and tolerance, offering affordable sports opportunities, and equal participation in sports. Furthermore, clubs put high value on the qualification of coaches and instructors. 8 % of the sports clubs (in total 7,200 clubs) are accredited as youth welfare services organisations (“Träger der freien Jugendhilfe”).

The share of clubs with a considerable commitment to health sports has levelled at around 26 %. It is noticeable that the share of offers in the area of rehabilitation is growing while the overall trend in health sports programmes is slightly declining.

The financial situation of sports clubs in Germany is stable. The perception of the financial situation as a problem for clubs has even decreased significantly. However, 6 % of clubs consider the introduction of a statutory minimum wage as a bigger problem.

The size of problems related to the availability, condition, or adequacy of sports facilities have neither increased nor decreased. Taking into account sports clubs' members (by weighting the dataset to be representative for sports club members rather than sports clubs), the problems of the availability and condition of sports facilities show slightly higher severity. This results from the fact that bigger sports clubs in terms of members are more affected by facility problems. In this context, it has to be taken into account that the usage of sports facilities as refugee camps has only started during the survey period and particularly afterwards. Thus, this specific problem could only partially be captured within the data collection. At the time of the survey (Sept. 17th – Dec. 8th 2015), 3,400 clubs stated that their sports facility had been used as a refugee camp in the previous two years.

The central problem of sports clubs in Germany remains the willingness to volunteer. Even though there are no significant changes in the number of volunteers in formal positions on the board and executive level (i.e. referees, coaches), the perception of the problem of recruiting and retaining volunteers has increased. Moreover, the number of secondary volunteers in clubs has slightly decreased.

Even though sports clubs still contribute significantly to public welfare, the following results should be considered carefully: 13 % of clubs totally disagree with the statement to be committed to the prevention of sexual violence. Furthermore, 7 % of clubs totally disagree with the statement to be highly engaged in youth work¹. In addition, 4 % of clubs totally disagree with the statement that they offer sports for families and aim to be family-friendly and 3 % of clubs totally disagree to be committed to an equal participation of girls/women and boys/men. Moreover, 2 % of clubs totally disagree with the statement to offer sports for people with a migration background. It should be examined whether these results point to a concentration of sports clubs on their core tasks, if the strategy and communication work of the sport federations is not reaching the clubs, or if other reasons for these rejections exist.

¹ An explanation for the rejection of statements in these areas could be that these sports clubs focus rather on adults and thus prevention of sexual violence and commitment to youth work are of less relevance. Moreover, sport-specific factors might play a role as well.

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

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

2.1 The club philosophy

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

Within the wide range of objectives, it is especially important that sports clubs (1) transmit values such as fair play and tolerance and (2) offer an affordable opportunity to practise sports (see Fig. 1). Further, clubs (3) promote the equal participation of girls/women and boys/men, (4) set high value on the qualification of coaches and (5) aim to be governed only by volunteers. Moreover, sports clubs manifest their role for democracy by including their members in important decision-making processes (see Fig. 1). Furthermore, clubs seem to quickly adjust to new challenges since they rate the commitment to prevent sexual violence as well as the support of refugees as important issues (see Fig. 3).

The indices² show that in some parts of the club system a recollection of traditional values is taking place: The commitment to health sports, the orientation on commercial sports providers, and the aim to offer a wide variety of sports is decreasing and reaches the lowest agreement among sports clubs (see Fig. 1 to 3). Further changes compared to the fifth wave can also be seen in other areas such the commitment for migrants and youth work. Moreover, it is noticeable that the agreement to other statements is slightly declining. For example, sports clubs put less value on companionship, conviviality, and tradition.

² See section 4.4 for the calculation of indices.

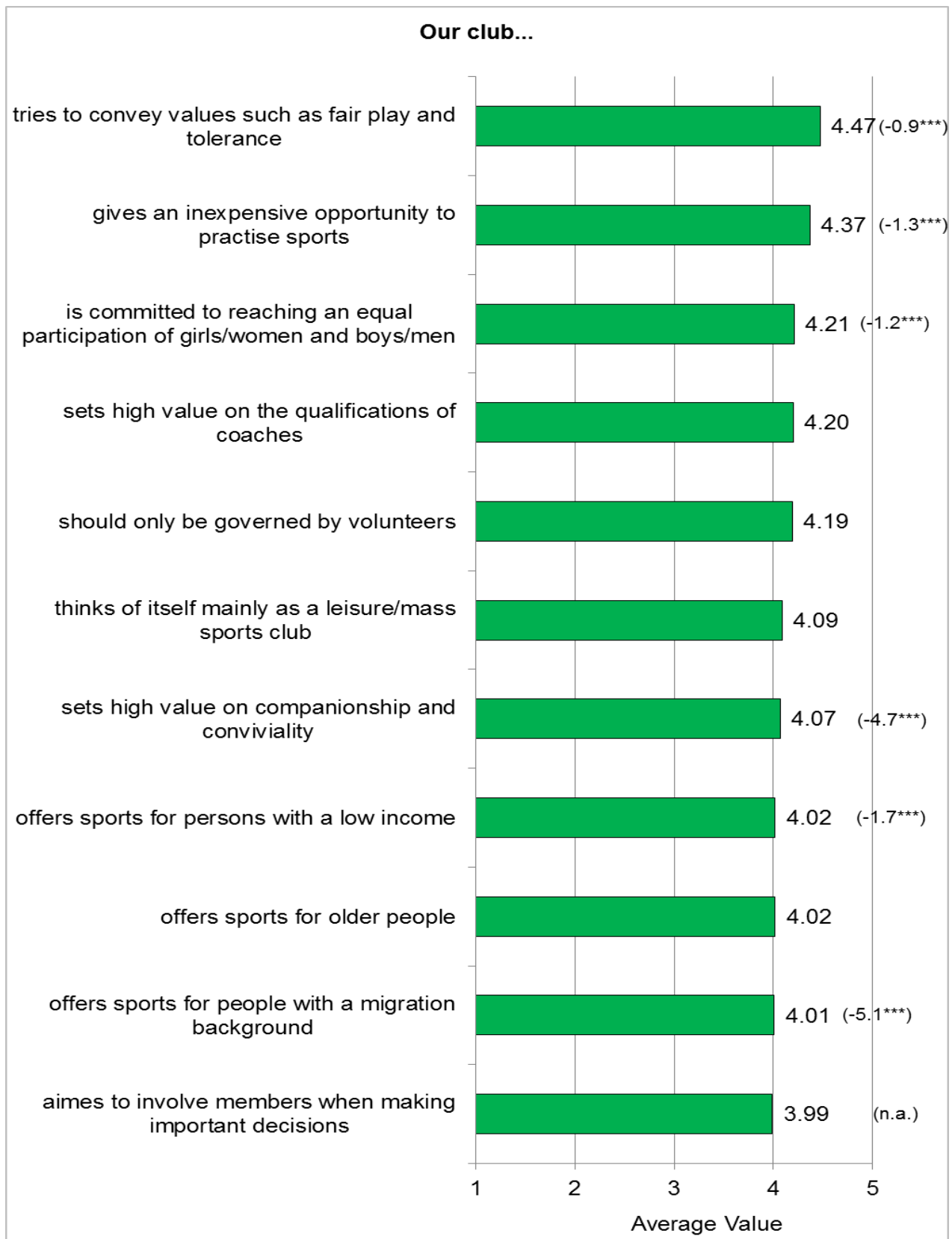


Fig. 1: Goals of sports clubs and their development (part 1; 1=totally disagree to 5=totally agree; in brackets: Index 2013=0; n.a.=not available 2013/2014).

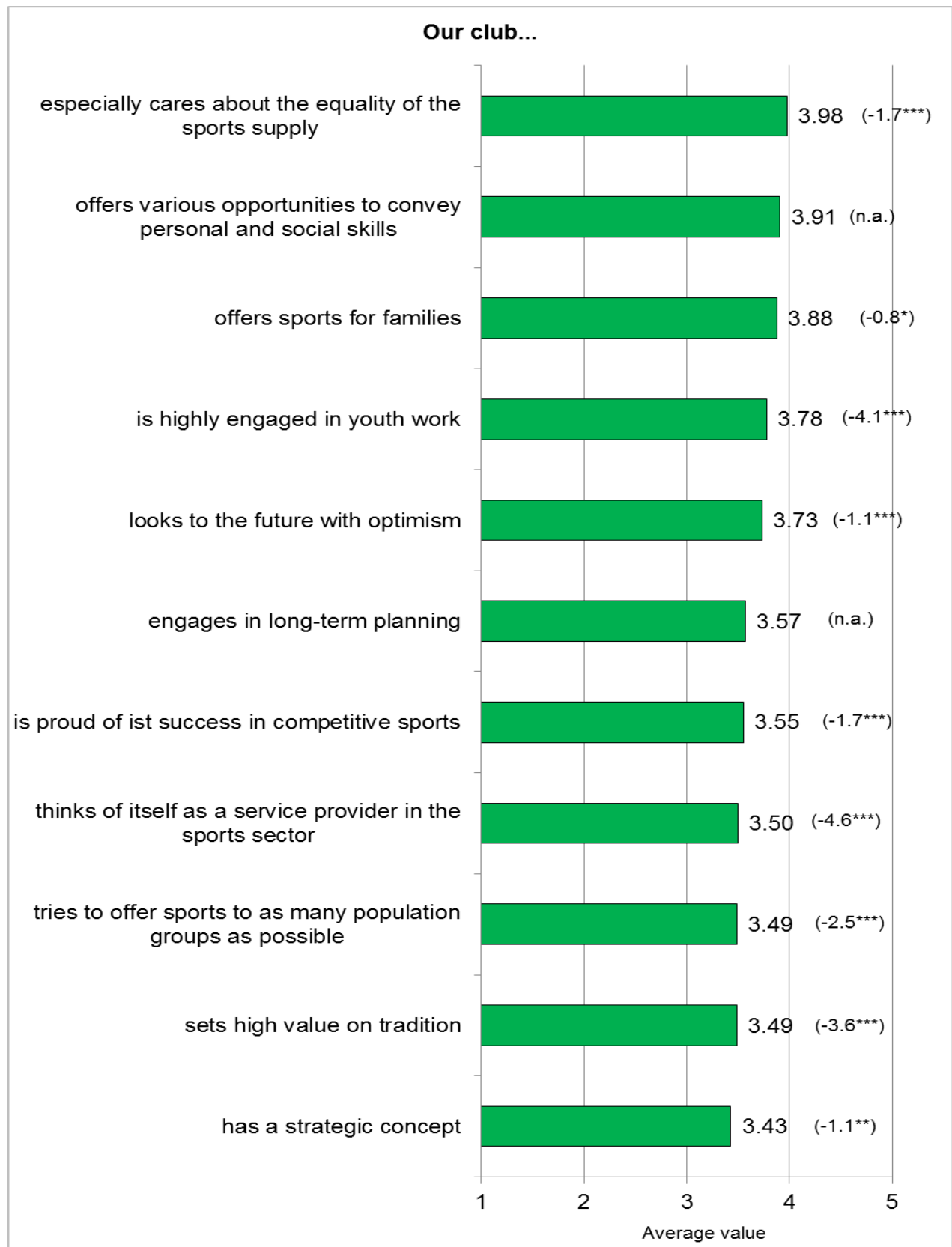


Fig. 2: Goals of sports clubs and their development (part 2; 1=totally disagree to 5=totally agree; in brackets: Index 2013=0; n.a.=not available 2013/2014).

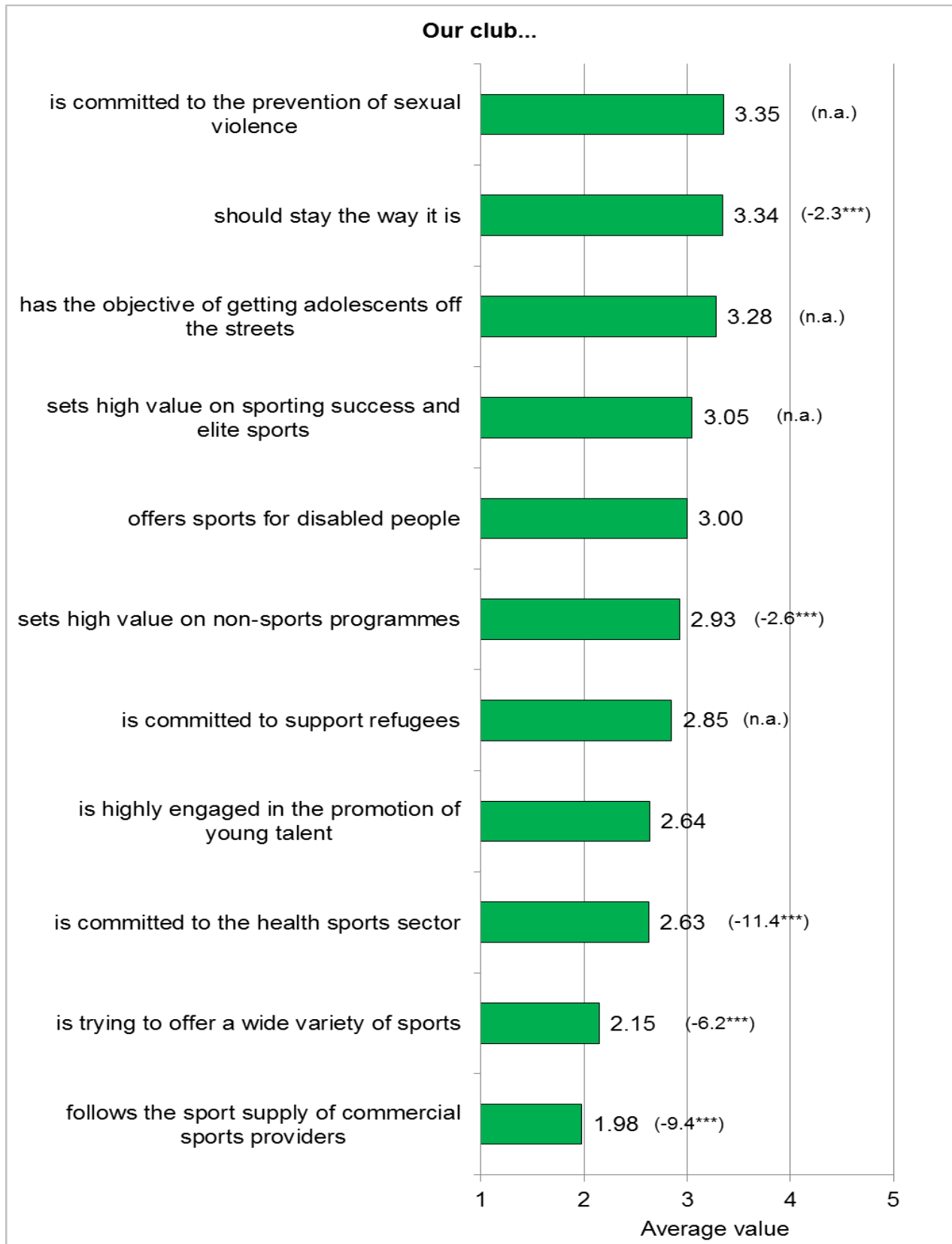


Fig. 3: Goals of sports clubs and their development (part 3; 1=totally disagree to 5=totally agree; in brackets: Index 2013=0; n.a.=not available 2013/2014).

Looking at the distribution of responses rather than the average values of club goals shows the following (see. Fig. 4 to 6): Most of the clubs (59 %) totally agree with the statement to offer an affordable opportunity to practise sports. At least half of the clubs totally agree with the statements that the club convey values such as fair play and tolerance (58 %), that the club should only be governed by volunteers (52 %), and that the club is committed to reach an equal participation of girls/women and boys/men (50 %).

By taking a look at the statements which clubs totally or rather agree with, certain differences become evident. The highest level of agreement is reached in the aim to convey values such as fair play and tolerance (91 %). Looking at the „midfield“ shows further interesting results: 75 % of sports clubs highly value companionship and conviviality and 74 % set high value on the qualification of coaches (see. Fig. 4 and 5).

Looking at the rejections of statements shows further interesting results. The strongest level of rejection can be observed in the aim to offer a wide variety of sports (43 % „totally disagree“) and in considering an orientation on the sports supply of commercial sports providers (37 %, see Fig. 6) While these rejections are unproblematic with regard to the role of sports clubs in public welfare, the following results should be examined more carefully: 13 % of clubs totally disagree with the statement to be committed to the prevention of sexual violence (see. Fig. 6). Furthermore, 7 % of clubs totally disagree with the statement to be highly engaged in youth work³. In addition, 4 % of clubs totally disagree with the statement that they offer sports for families (see Fig. 5) and 3 % of clubs totally disagree to be committed to an equal participation of girls/women and boys/men. Moreover, 2 % of clubs totally disagree with the statement to offer sports for people with a migration background (see Fig. 4). Even though the relative share of rejection in these areas is rather small, it has to be examined whether these results point to a focus of sports clubs on their core tasks, if the strategy- and communication work of the sports federations is not reaching the clubs, or if other reasons for these rejections exist.

³ An explanation for the rejection of statements in these areas could be that these sports clubs focus rather on adults and thus prevention of sexual violence and commitment to youth work are of less relevance. Further factors which are specific to selected kinds of sports could play role as well.

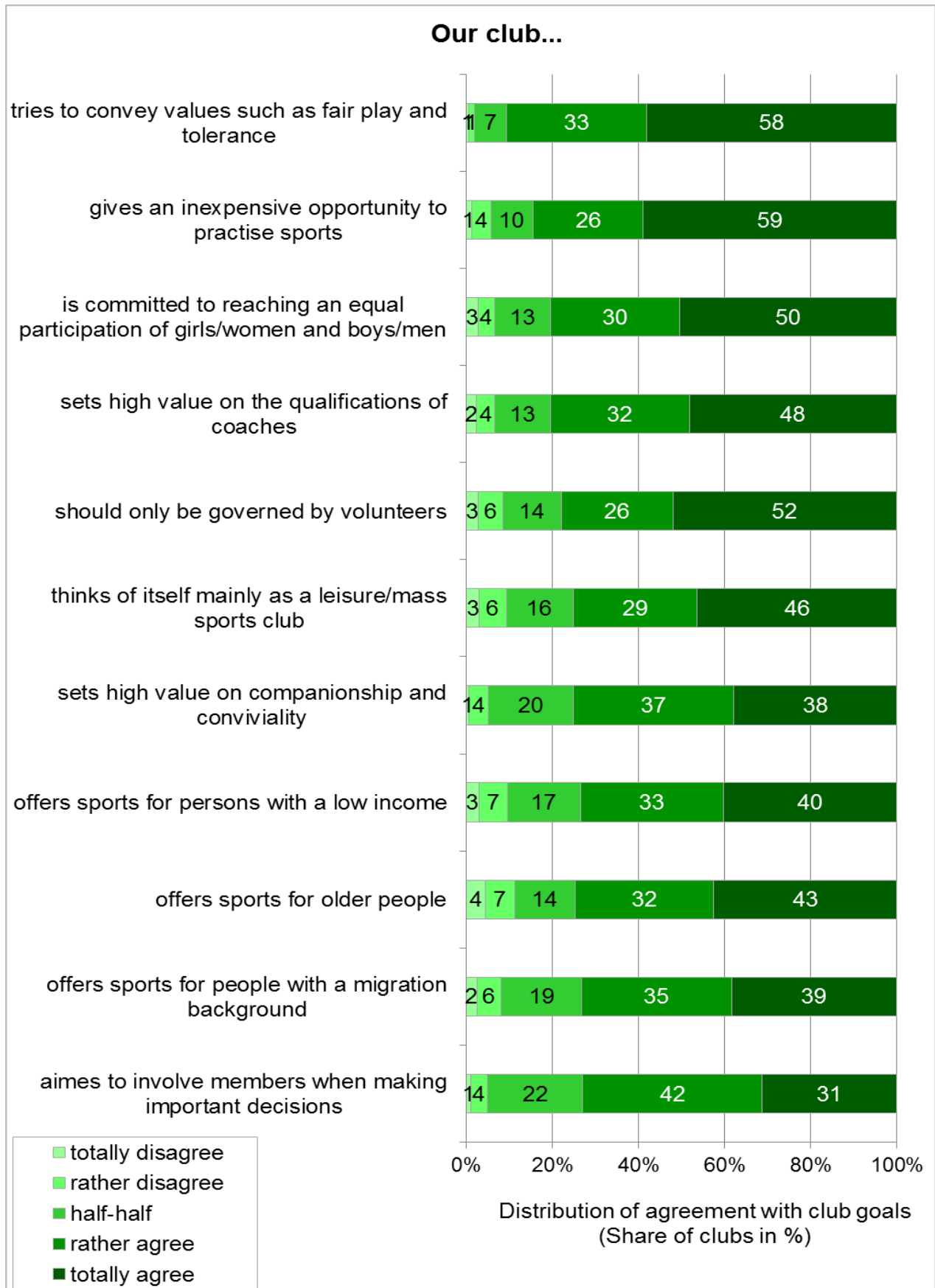


Fig. 4: Distribution of agreement with club goals (Part 1).

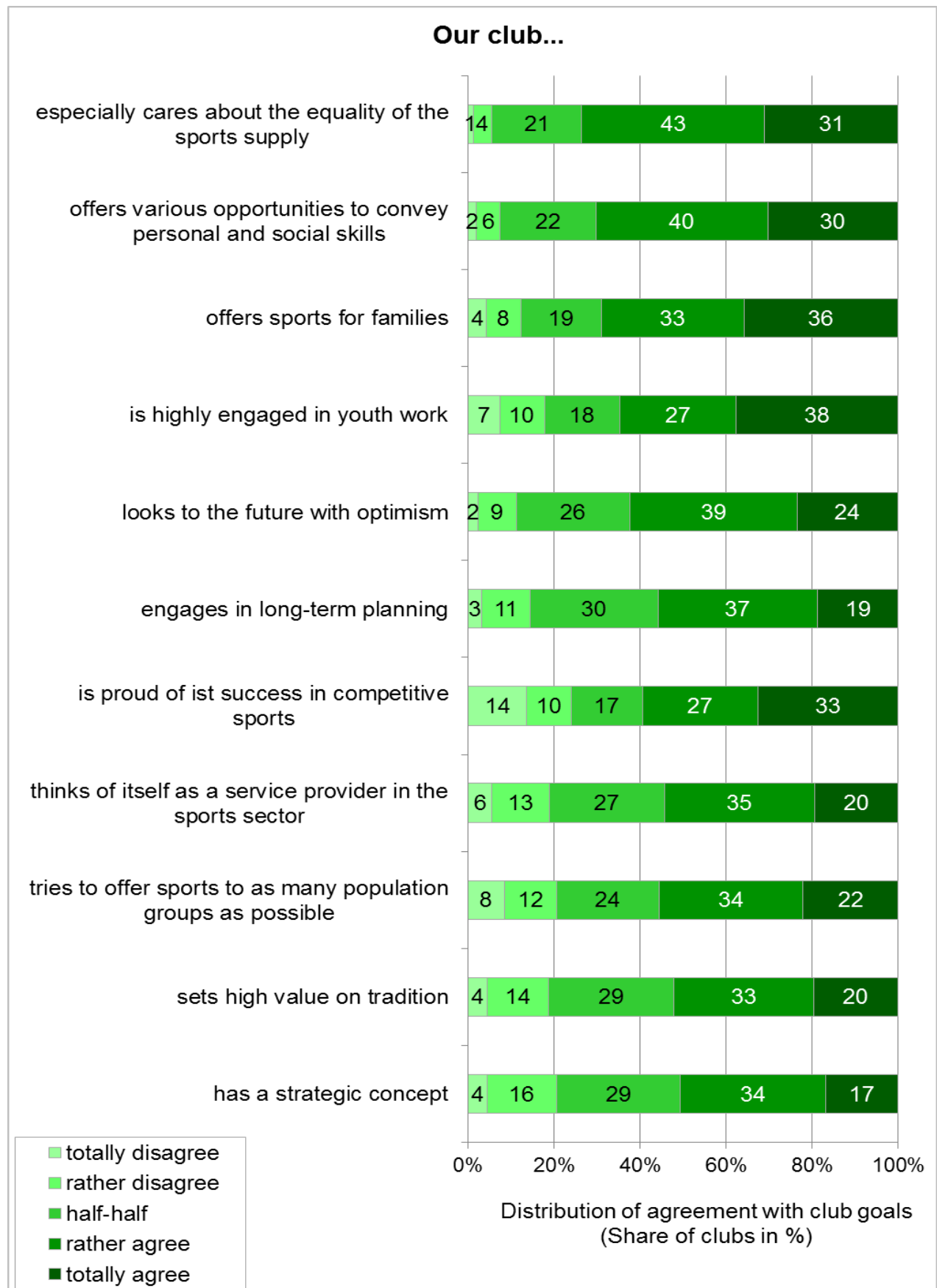


Fig. 5: Distribution of agreement with club goals (Part 2).

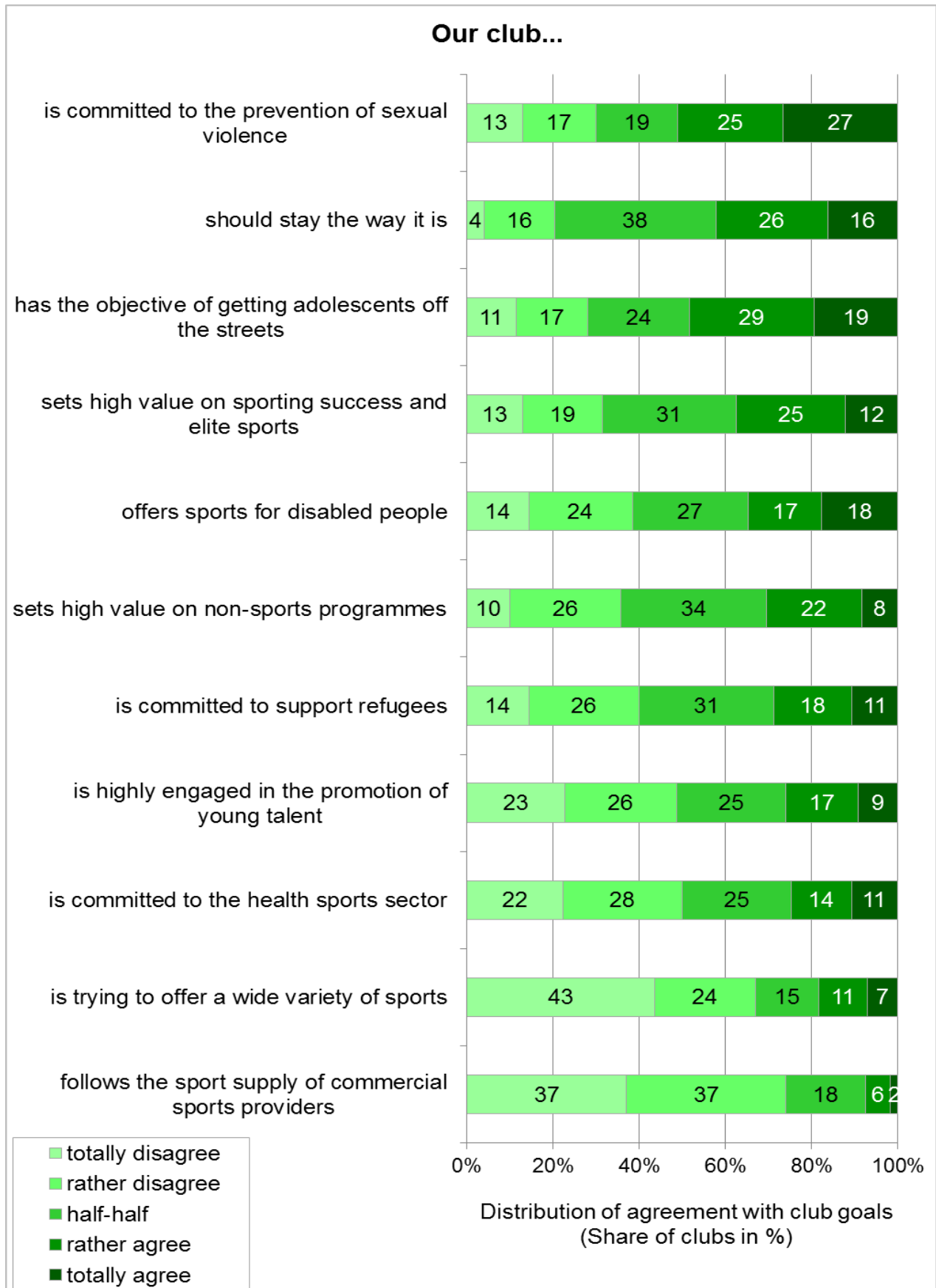


Fig. 6: Distribution of agreement with club goals (Part 3).

2.2 Sports supply for the population

The aim of sports clubs to offer an affordable sports supply to the population is still mirrored in the clubs' membership fees. As such, sports clubs guarantee organised sports programmes which are affordable to the mass population. Half of all sports clubs charge a maximum monthly membership fee of € 2.50 for children, € 3.- for adolescents, and € 6.30 for adults (see. Tab. 1).

Tab. 1: Monthly membership fees in sports clubs.

Monthly fee for	Median ⁴ (in €)
Children	2.50
Adolescents	3.00
Adults	6.30

According to § 75 of the eighth code of social law (SGB VIII), legal entities and associations of persons can be accredited as youth welfare services organisations ("Free youth aid" = „Träger der freien Jugendhilfe“) when they are active in the field of youth work, aim for charitable goals, can be expected to be able to provide a substantial contribution to the work of the free youth aid based on professional and personal conditions, and ensure to offer work which is contributing to the goals of the German constitution. At least 8 % of sports clubs in Germany, which amounts to more than 7,200 sports clubs, are accredited by the free youth aid. However, it has to be noted that a high percentage of clubs could not answer this question (57 %; see Tab. 2). If the clubs who could not answer this question included a similar share of clubs (8/35) which are accredited by the free youth aid, then every fifth sports club in Germany would be accredited by the free youth aid.

Tab. 2: Club is accredited by the free youth aid according to § 75 SGB VIII.

Accredited by the free youth aid	Share of clubs (in %)	Clubs (total)
yes	8.0	7,220
no	35.0	31,580
Don't know	57.0	51,440

Without sports clubs, elite sports in Germany would be hard to imagine. 12.6 % (meaning about 11,400 clubs) have national squad athletes at the D, D/C-, C-, B- or A-squad level and consequently form the basis for elite sport in Germany. In

⁴ The median is described as the number separating the higher half of the distribution from the lower half. The median is less prone to outlier values than the mean value ("average").

comparison to 2013, significantly more clubs stated to have national squad athletes.⁵ The increase amounts to nearly 8 % (see. Tab. 3).

Tab. 3: Sports clubs with national squad athletes⁶ and its development.

	Share of clubs (in %)	Clubs (total)	Index (2013=0)
National squad athletes present	12.6	11,400	+7.7**

2.3 Health care

The sports clubs in Germany contribute significantly to the health care of the population. Every fourth sports club (in total about 24,200 clubs) offers programmes with the purpose of health promotion, prevention, and rehabilitation. Offerings for disabled and chronically ill people are included in that (see Tab. 4).

Tab. 4: Sports clubs with sports programmes in the health care section and its development.

	Share of clubs (in %)	Clubs (total)	Index (2013=0)
Health promotion and primary prevention	24.8	22,400	-21.2***
Rehabilitation/tertiary prevention	4.1	3,700	-20.0*
Disabilities/chronic diseases	3.5	3,200	-33.3***
Sum of categories related to health care	26.8	24,200	-17.6***

Taking a more differentiated look at health sport offers, most clubs with such programmes offer these in the area of health promotion and primary prevention (approx. 25 %). This includes sports programmes like coronary sports and fall prevention training programmes. 4 % of sports clubs supply sports programmes in the area of rehabilitation and tertiary prevention and 3.5 % offer sports for people with disabilities and chronic diseases. The number of sports clubs which offer health-related sport programmes in general as well as in each of the three areas (i.e. health promotion and primary prevention, rehabilitation and tertiary prevention as well as sports programmes for people with disabilities and chronic diseases) has decreased in comparison to 2013 (see Tab. 4)⁷. This decline confirms the

⁵ This development suggests that the concentration process of elite athletes in a certain number of sports clubs is not continuing. A tendency towards such a concentration was detected in the Sport Development Report 2011/2012 (see Breuer & Feiler, 2013).

⁶ Federal and national squads.

⁷ However, the share of clubs offering health-related sports programmes had increased between 2011 and 2013 (see Breuer & Feiler, 2015a).

results of the club philosophy regarding a commitment to the health sports sector (see Fig. 3).

Looking at the health care programmes in relation to the sports clubs' overall sports programmes, it becomes evident that on average every tenth sport programme in sports clubs in Germany is related to health care (see Tab. 5).

Tab. 5: Share of health sports programmes related to all sports club programmes.

	Share of sports programmes (mean in %)	Index (2013=0)
Health promotion and primary prevention	7.7	-19.1***
Rehabilitation/tertiary prevention	1.3	+22.5*
Disabilities/chronic diseases	0.9	-24.4***
Sum of categories related to health care	10.0	-16.5***

The biggest share of all sports programmes (approx. 8 %) is offered in the area of health promotion and primary prevention whereas a rather small share (0.9 %) of all sports programmes is offered for people with disabilities or chronic diseases. Sports programmes in the area of rehabilitation and tertiary prevention take up 1.3 % of all sports programmes. Significant declines in comparison to 2013 can be seen in the total share of health-related sports programmes as well as in the areas of primary prevention and programmes for people with disabilities and chronic diseases. In contrast, the share of programmes related to rehabilitation and tertiary prevention has increased significantly (see Tab. 5). The latter result suggest that generally less sports clubs offer sports programmes in the area of rehabilitation and tertiary prevention (see Tab. 4), while clubs which offer such programmes have increased these specific offers in relation to other sports programmes. Moreover, the total number of sports programmes in clubs has decreased compared to 2013 (-14.7 %). These results confirm the results of the club philosophy: clubs are less focused on a wide variety of sports than it was the case two years ago (see Fig. 3).

Besides the described health-related sport programmes which might also include offers such as gymnastics courses or Nordic walking, there are further specific health sport courses which are offered by the sports clubs in Germany. Approximately 17 % of the clubs state to offer such courses. Health sports courses which are certified by the quality seal "SPORT PRO GESUNDHEIT"

("SPORT PRO HEALTH") are offered by approximately 6 % of the sports clubs (in total more than 5,300 clubs⁸, see Tab. 6).

Tab. 6: Health sports courses.

	Share of clubs (in %)	Clubs (total)
Offering health sports courses	17.2	15,500
Offering certified courses with the quality seal "SPORT PRO GESUNDHEIT"	5.9	5,300

A rather small share of clubs (3.5 %) is in possession of a club-owned gym. In total, this applies to approximately 3,200 clubs. However, only 200 of these club-owned gyms are certified with the quality seal "SPORT PRO FITNESS" (see Tab. 7).

Tab. 7: Club-owned gym and SPORT PRO FITNESS.

	Share of clubs (in %)	Clubs (total)
Club-owned gym existing	3.5	3,200
Certified club-owned gym with the quality seal "SPORT PRO FITNESS"	0.2	180

2.4 Convivial gatherings

In addition to the actual sports supply of sports clubs, convivial gatherings, i.e. social programmes that are not related to sports, intensify the public welfare character of sports clubs. In 2014, almost 45 % of all sports clubs' members participated in such social programmes. This means that overall about 12.2 million club members took part in convivial gatherings offered by their clubs. However, a significant decrease can be observed in comparison to 2009 (see Tab. 8). This development could be a hint for a weaker social commitment between members and clubs. On the other hand, the reduced amount of free time could also hinder members from participating in convivial gatherings offered by the clubs.

⁸ According to information from the sport confederations, approximately 8,000 clubs are certified with the quality seal "SPORT PRO GESUNDHEIT". This difference to the study results suggests that offers might have been withdrawn or club representatives who participated in the survey had no knowledge of the seal of quality.

Tab. 8: Club members who have participated in convivial gatherings offered by their club in 2014 and their development.

	Share of members (Mean in %)	Members (total)	Index (2013=0)
Participation in convivial gatherings	44.6	12,164,000	-4.1***

2.5 Voluntary commitment and central volunteers

A central feature of the public welfare character of sports clubs is presented by the voluntary commitment and central voluntary positions. This accounts for the board level as well as for the executive level. The executive level in sports clubs comprises several functions under the management of the board which are implemented for a long-term period, display more than negligible complexity, and are of high importance for guaranteeing the sports supply and competition operations. The executive level includes particularly coaches, instructors, referees and officials. Altogether, German sports clubs comprise 1.7 million volunteers. There are about 1.2 million positions held by men and 0.5 million by women (see Tab. 9).

Tab. 9: Voluntary positions.

Number of central volunteers	Mean	Total
At board level	8.3	750,300
At executive level	9.0	808,000
Cash auditor	1.6	143,100
Total	18.9	1,701,400
Male	13.0	1,173,500
Female	5.9	527,900
Working hours per volunteer (hours/month)	13.4	22,851,000

There are no significant changes between 2013 and 2015 in the number of central volunteers. On average, a central volunteer works 13.4 hours per month for his/her club. Nationwide this adds up to 22.9 million working hours which are served in the sports clubs every month in order to attain public welfare purposes (Tab. 9). This results in a nationwide monthly added value of € 343 million and a

yearly added value⁹ of € 4.1 billion¹⁰. It is important to note that the performance of secondary volunteers with special employment contexts (sporting events, festivals, chauffeur service, renovations, etc.) is not considered in this calculation. Although a significant decrease is recorded for secondary volunteers (-4.4 %) compared to 2013, a share of 23 % of club members still work as secondary volunteers. This means that approximately 6.3 million members work sporadically as secondary volunteers in sports clubs. Adding up the secondary volunteers to the central volunteers, a total number¹¹ of about 8 million volunteers work in German sports clubs.

Even though the total number of volunteers is stable, the act of recruiting and retaining volunteers is still a central issue for sports clubs (see also section 3.1). Thus, sports clubs take on various measures and initiatives to recruit and retain volunteers on the board level (voluntary functionaries) as well as on the executive level (coaches, instructors, referees and officials). Personal contact is crucial in this matter. More than two thirds of sports clubs (70.4 %) are trying to motivate their volunteers through personal encouragement. Furthermore, approximately 63 % organise social gatherings, community evenings, and festivities to strengthen the feeling of companionship and group identity within the club. Approximately 55 % of clubs recruit their volunteers with the aid of current volunteers and members. In addition, more than 40 % of clubs offer their volunteers the opportunity of further qualifications (i.e. courses, trainings, seminars, further education, etc.) and almost 16 % motivate their volunteers with direct or indirect financial incentives (i.e. no membership fee or reduction of membership fee, taking over equipment costs, etc.). Moreover, around 8 % of clubs try to recruit volunteers from outside the club (i.e. through advertising volunteer positions on the club homepage, in social networks like Facebook, in newspapers, etc.). Likewise, around 8 % of clubs are relying on one person (voluntary or paid) to be responsible for the recruitment and retention of volunteers. However, only 2 % of clubs have drawn up a written strategy on how to recruit and retain volunteers. Almost 14 % of clubs stated to have no specific measures in place to recruit and retain volunteers. Further, more than one quarter of clubs expects all members to participate in voluntary work and approximately

⁹ For the calculation of the monthly added value through volunteers in sports clubs, an hourly wage rate of € 15 was assumed, based on Heinemann and Schubert (1994). The yearly added value results from multiplying the monthly added value by the factor of 12.

¹⁰ The decline in the yearly added value in sports clubs from € 4.3 billion in 2013 (Breuer & Feiler, 2015a) to € 4.1 billion in 2015 in a two-point cross-sectional analysis can be traced back to both the decline in volunteer positions as well as the decline in monthly working hours per volunteer.

¹¹ With regard to the total number it has to be considered that persons who hold both a voluntary position and act as secondary volunteers are included twice.

18 % of clubs expect this from parents whose children are members of the club (see Tab. 10).

Tab. 10: Measures for recruitment and commitment of volunteers.

The club...	Share of clubs (in %)	Clubs (total)
encourages and motivates its volunteers verbally (talking with the volunteers, convincing them to carry on, etc.)	70.4	63,500
arranges parties and social gatherings for the volunteers to strengthen group identity	62.5	56,400
mainly recruits through the networks of current volunteers and members	54.7	49,400
offers volunteers to take training or gain qualification (e.g., courses, licences, etc.)	40.6	36,600
informs members that they are expected to contribute with voluntary work	26.7	24,100
Informs parents of children who are members that they are expected to contribute with voluntary work	17.9	16,200
rewards its volunteers with benefits in kind (e.g., no or reduced payment of membership fee, subsidised equipment)	15.7	14,200
tries to recruit volunteers from outside the existing club members	8.4	7,600
has a volunteer or paid staff member with specific responsibility for volunteer management	7.8	7,000
uses other measures for the recruitment and retention of volunteers	3.4	3,100
has a written strategy for volunteer recruitment	2.3	2,100
does not do anything in particular for the recruitment and retention of volunteers	13.8	12,500

2.6 Paid staff

Even though volunteers are in charge of most of the tasks in sports clubs and they are therefore crucial to the clubs, there are some clubs with at least one paid staff member in a leading position (e.g. a general manager). Around 5,100 sports clubs in Germany employ at least one paid staff member. This position is mainly filled with part-time staff (see Tab. 11).

Tab. 11: *Paid staff in sports clubs.*

	Share of clubs (in %)	Clubs (total)
Paid staff existent	5.7	5,100
...full-time	1.6	1,400
...part-time	4.1	3,700

Developments cannot be displayed here since the survey in 2015 differentiated in full-time and part-time paid staff members while the survey in 2013 only accounted for paid staff in total. Thus, this question is not comparable. Still, the results indicate an increase in the number of paid staff members. The employment of paid staff could be related to – besides the scarce availability of volunteers – the increasing complexity of tasks and bureaucracy which clubs are facing and which are hard to deal with for volunteers (see Breuer & Feiler, 2015b).

The increase in the number of paid staff members can be seen in the self-assessment of clubs regarding the development of paid staff. It has to be noted that the survey did not only ask for paid staff in managerial positions but also for positions in administration, sport-, training- and competition operations as well as in maintenance. Approximately twice as many clubs report a sharp increase in the number of paid staff positions than a sharp decline. In addition, clubs report a slight increase in the number of paid staff three times more often than a slight decline (see Fig. 7).

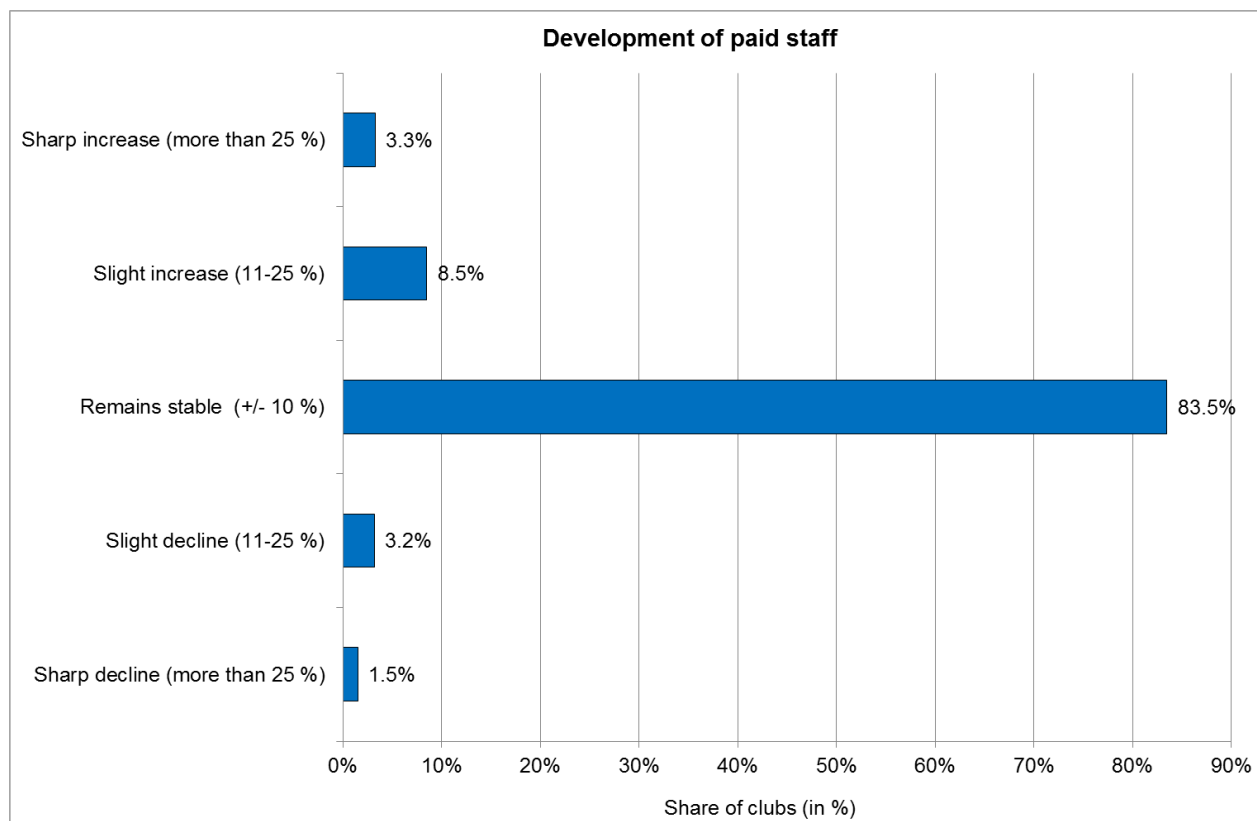


Fig. 7: Development of paid staff over the past 5 years (self-assessment of sports clubs).

3 Need for support (knowledge of action)

3.1 General and existential problems

Despite all the remarkable performances of sports clubs it cannot be said that the situation of the clubs is without problems. Problems are still evident with reference to the recruitment and retention of (1) volunteers, (2) adolescent competitive athletes, (3) coaches/instructors, (4) referees/officials, and (5) members. The need for support further exists in light of the (6) demographic change in the regions and (7) the number of laws, orders, and directives facing sports clubs. Moreover, (8) the effects of all-day schools and 8-year academic high schools (G8) on the available time for training and sports practice challenge the clubs. Lowest, however, is the problem pressure due to local competition from commercial and local or municipal sports providers (see Fig. 4). Furthermore, the introduction of a legal minimum wage on January 1, 2015 seems to be a minor problem for sports clubs (see Fig. 8). However, approximately 6 % of clubs consider it a big or very big problem (see Fig. 9).

In the last two years the perceived severity of problems relating to the recruitment and retention of volunteers has significantly increased (see Fig. 8). More than half of the clubs consider this a big or very big problem (see Fig. 9). On the contrary, problems related to the financial situation of clubs and the expenses for sports competitions have decreased. More than 60 % of clubs state these problems to be small or non-existent (see Fig. 9). In addition to that, clubs view the demographic change in the regions as well as the unclarity of the clubs' overall perspective as smaller problems than two years ago (see Fig. 8).

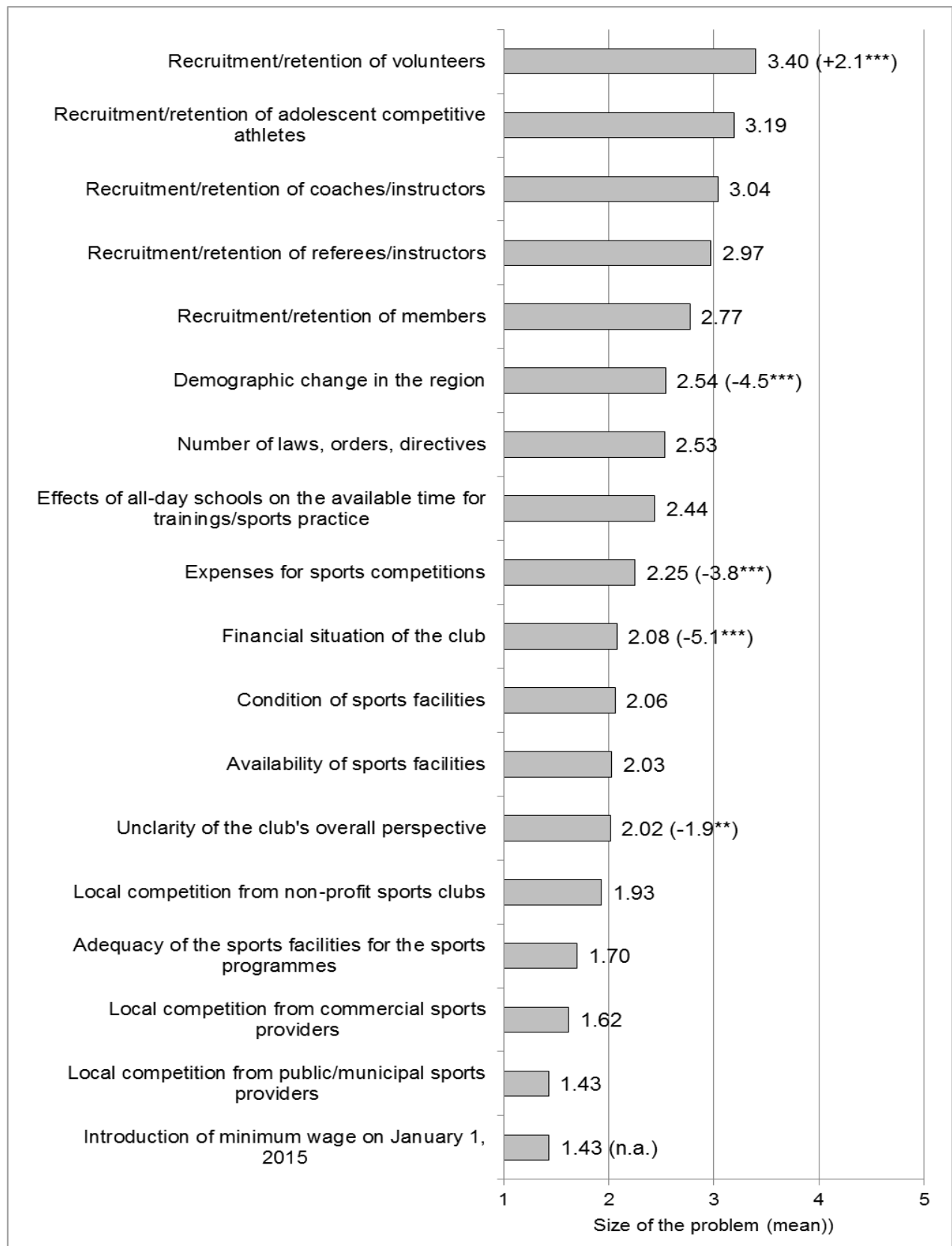


Fig. 8: Problems of the sports clubs sorted by the size of the problem and their development (1=no problem, 5=very big problem; index in brackets: 2013=0; n.a. = not available 2013/2014).

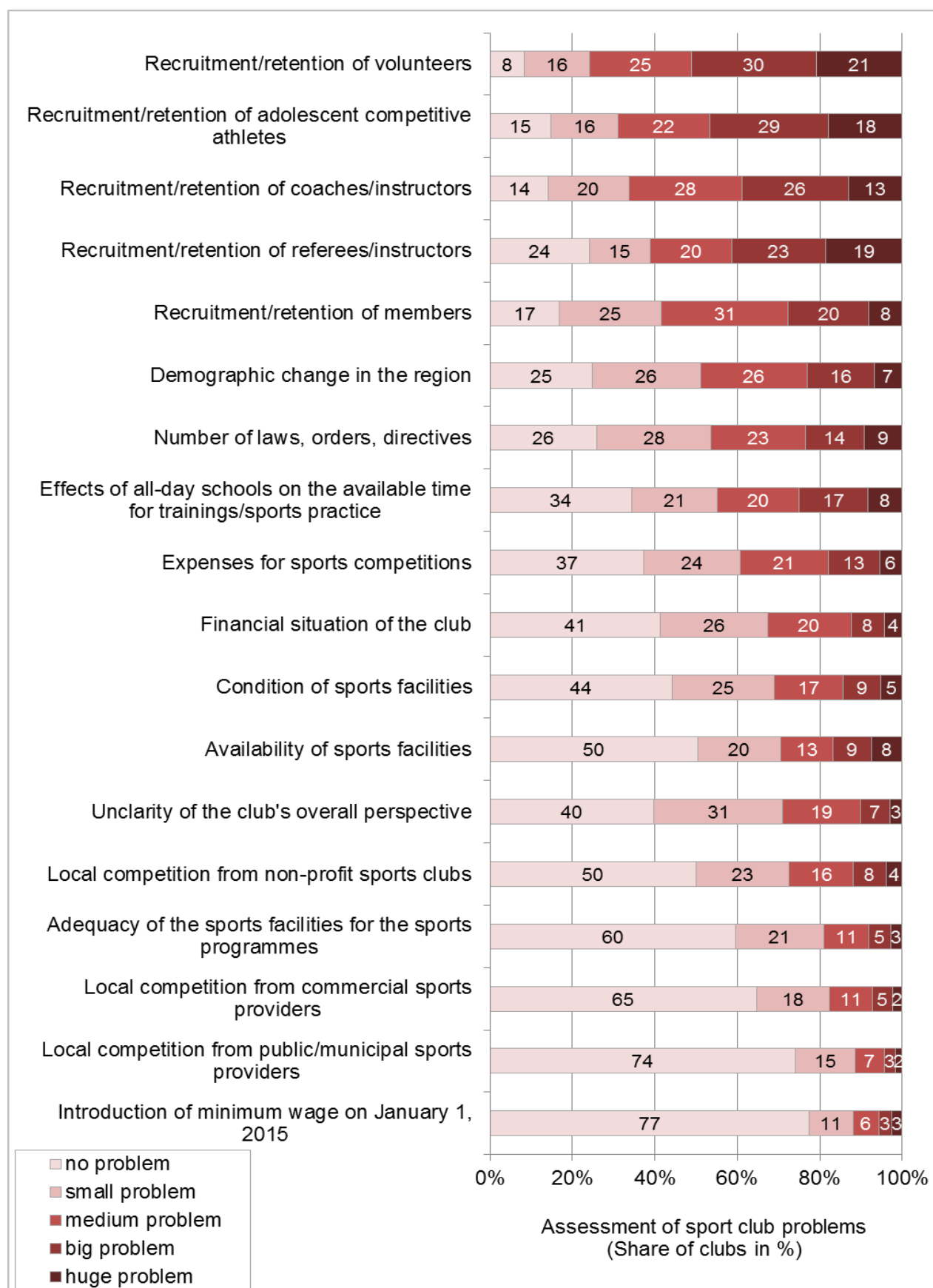


Fig. 9: Assessment of sport club problems.

The averagely moderate severity of problems should not detract from the fact that there is a large number of clubs that have at least one existential problem. Nationwide, 36.4 % of all sports clubs (approximately 32,800 clubs) have at least one problem that threatens the existence of the club. By far the biggest existential problem seems to be the recruitment and retention of volunteers: 14.3 % of clubs state to be threatened in their existence by this issue. A further 7 % of clubs consider the recruitment and retention of coaches and instructors as well as members to be an existential problem. Likewise, around 6.5 % of clubs feel threatened by the problem of recruiting and retaining adolescent competitive athletes. 5.6 % of clubs consider the number of laws, orders, and directives as an existential problem (see Fig. 10).

The existential problem attributable to the recruitment and retention of volunteers has increased significantly. On the contrary, clubs feel less threatened by the effects of all-day schools on the available time for training and sports practice, the demographic change in the regions, and the expenses for sport competitions (see Fig. 10).

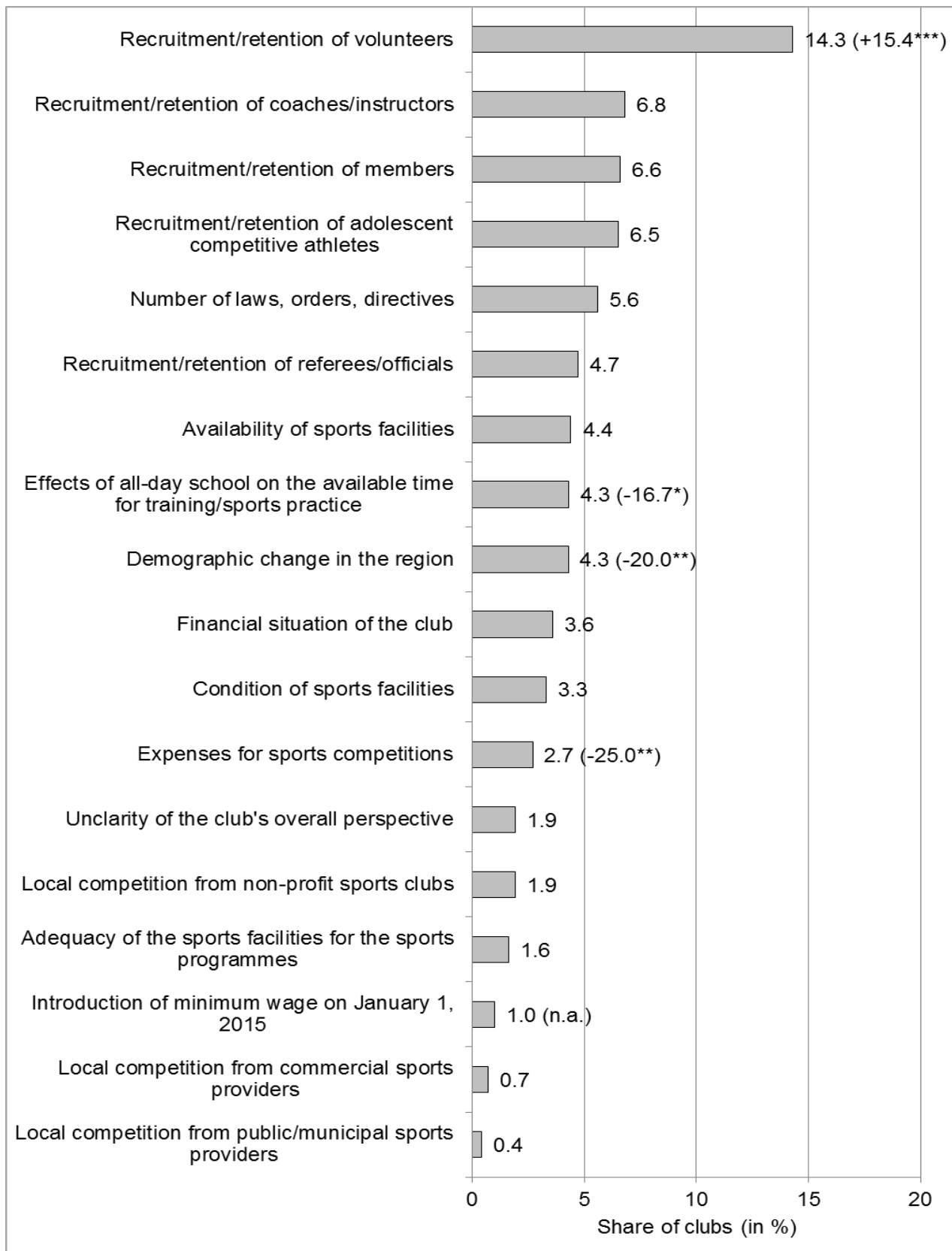


Fig. 10: Proportion of sports clubs with existential problems and their development (in %; index in brackets: 2013=0; n.a.=not available 2013/2014).

In this sixth wave of the Sport Development Report the concept of a “system perspective” is used for the first time. This concept illustrates to what extent sports clubs members are affected by existential problems. For this purpose, clubs were additionally weighted by the number of members in relation to the average number of members of all sports clubs so that the results are representative for all sports clubs members¹² in Germany rather than sports clubs (see chapter 4.3).

The results of the system perspective differ only slightly from the results which were previously presented. However, the analysis reveals that club members are more often affected by some existential problems than it is suggested by the traditional club results.

Problems related to the availability and condition of sports facilities appear more often. 5.3 % of sports clubs members are members of clubs which are affected by the existential problem of the availability of sports facilities (see Fig. 11) whereas only 4.4 % of clubs consider this to be an existential problem (see Fig. 10). 3.6 % of sports clubs members are members of clubs which are threatened by the condition of sports facilities (see Fig. 11) while only 3.3 % of sports clubs state this to be an existential problem (see Fig. 10). This is due to the facts that bigger sports clubs are more affected by problems related to sports facilities and that a disproportionately large share of members is organised in big sports clubs. In addition, existential problems due to local competition from commercial sports providers seem to appear more often (1.0% vs. 0.7 %).

On the other hand, there are also existential problems which seem to affect members less often than it is suggested by the traditional club perspective. In this regard, fewer members are organised in sports clubs which are threatened by local competition from non-profit sports clubs (1.3 %) than the traditional club results indicate (1.9 %). Furthermore, fewer members are organised in clubs which are affected by the unclarity of the clubs' overall perspective (1.0 %) than clubs averagely state (1.9 %). Moreover, fewer members are organised in clubs which are threatened by the problem of recruiting and retaining members (2.4 %) than the club perspective indicates (6.6 %). A similar result is found with regard to the recruitment and retention of adolescent competitive athletes (2.5 % vs. 6.5 %, see Fig. 10 and 11).

¹² It has to be noticed that no member survey was conducted.

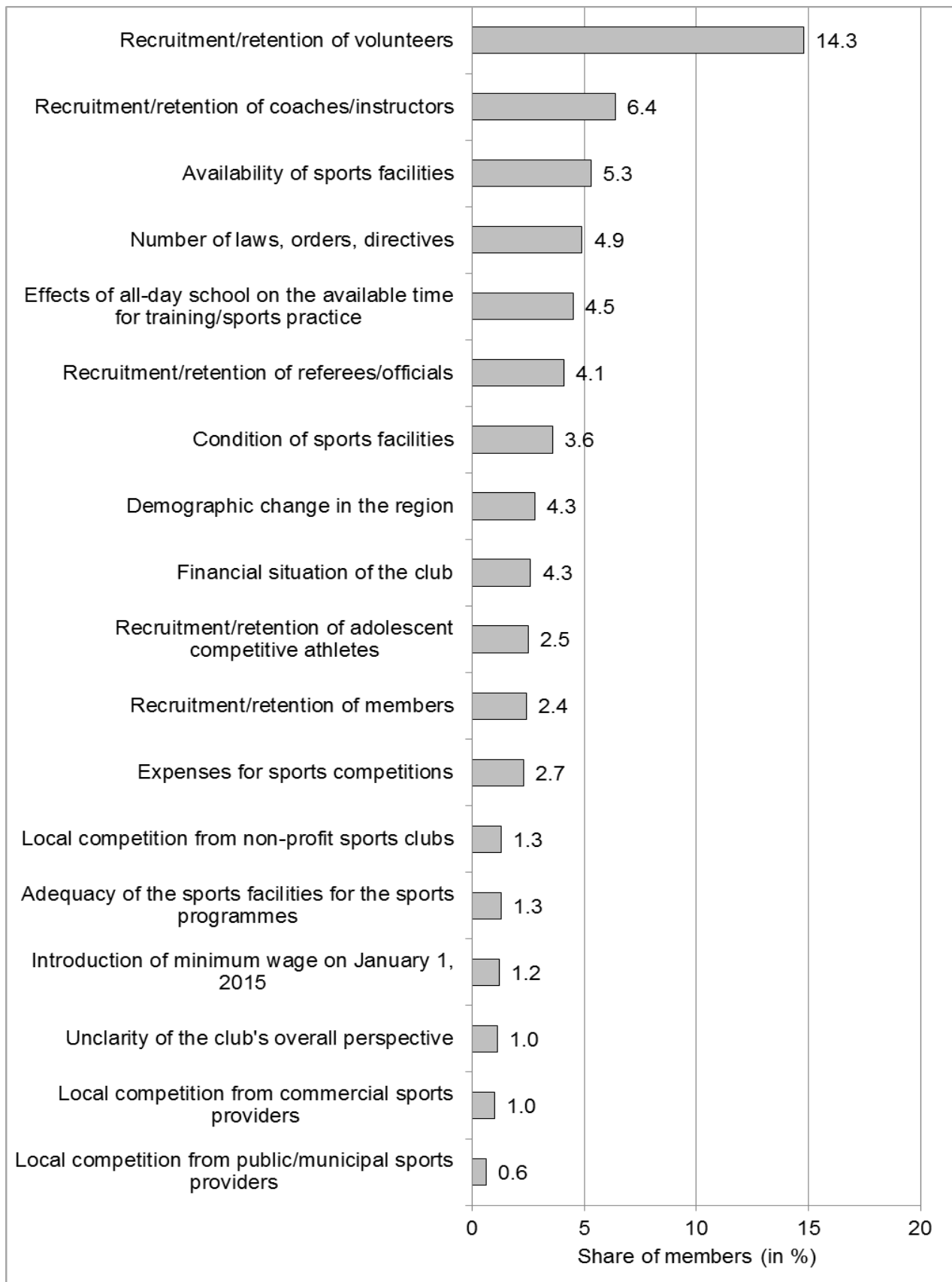


Fig. 11: Share of members in clubs which are affected by existential problems (in %).

3.2 Sports facilities

In total, 46.3 % of all sports clubs are in possession of club owned sports facilities. (see Tab. 12). Since investments into sports facilities and their maintenance are linked to financial burdens for sports clubs – expenses for maintaining and operating sports facilities are the second highest item of expenditure (see chapter 3.3, Tab. 15) – these clubs vitally contribute to public welfare¹³.

Tab. 12: Use of club owned and public owned facilities.

	Share of clubs (in %)	Clubs (total)	Index (2013=0)
Use of club owned facilities	46.3	41,800	
Use of public owned facilities	61.2	55,200	
liable to pay fee	51.2	28,300	+4.0**

In addition to the possession of own sports facilities, 61.2 % of all clubs (approximately 55,200 clubs) use public sports facilities (also school facilities). In total, approximately one third of all clubs has to pay fees for the usage of public facilities. From all clubs using public facilities, 51.2 % have to pay for it (in total around 28,300 clubs). Compared to 2013 slightly more clubs have to pay fees for the usage of public facilities (see Tab.12).

About 3,400 clubs (3.8 %) state that sports facilities which are used by them have been utilized as refugee camps in the past two years (see Tab. 13). Roughly the same share of clubs (4.4 %) considers the availability of sports facilities as an existential problem (see Fig. 10).

Tab. 13: Usage of sports facilities as refugee camp in the past two years.

	Share of clubs (in %)	Clubs (total)
Usage of sports facilities which are used by clubs as refugee camps	3.8	3,400

3.3 Finances

The overall financial situation of the sports clubs in Germany is reflected in the profit and loss calculation of the clubs that is generated by subtracting the

¹³ Based on data from the Sport Development Report, Breuer (2008) found that a negative financial balance only occurs through investments into indoor sports fields and tennis courts, but not through investments into sports grounds or gyms.

expenses from the revenues. It appears that, in 2014¹⁴, 76 % of the sports clubs had at least a balanced profit-and-loss account. Compared to the previous survey period (reference year 2012), this share has remained stable (see Tab. 14).

Tab. 14: Profit and loss calculation of sports clubs in 2014 and its development.

	Share of clubs (in %)	Clubs (total)
At least balanced profit-and-loss account	76.2	68,800

Looking at the expenses of sports clubs it is shown that, on average, sports clubs in Germany spend the most on (1) coaches/instructors, followed by (2) costs for the maintenance and service of self-owned facilities, (3) costs for sports equipment and clothing, (4) rent and compensation for the use of other-owned sports facilities as well as (5) costs for the execution of own sports events. Like two years ago, this shows that the averagely highest costs are attributed to the core processes and tasks of the sports clubs. In comparison to 2012, there are no significant changes (see Tab. 15).

Tab. 15: Expenses of sports clubs in 2014 and their development (n.a.=not available 2013/2014).

Expenses for	Mean (in €)	Index mean (2013=0)	Share of clubs that have the expense (in %)
Coaches/instructors	7,528		58.6
Maintenance and service of self-owned facilities	4,633		46.1
Sports equipment and clothing	2,354		67.2
Rent and compensation for the use of other-owned sports facilities	1,879		45.9
Execution of own sports events	1,722		52.6
Administrative staff	1,457		10.1
Maintenance staff, ground keeper, etc.	1,256		18.9
Debt services (interest, etc.)	1,253		14.8
Travel expenses for training and competition	1,186		37.5
General administrative costs	1,170		57.8
Non-sports-related events (e.g. convivial gatherings)	1,151		54.3

¹⁴ Financial year prior to the survey, see chapter 4.5

Expenses for	Mean (in €)	Index mean (2013=0)	Share of clubs that have the expense (in %)
Membership fees to sports organisations: federations	1,100	n.a.	74.2
Membership fees to sports organisations: confederations at regional and local level	1,035	n.a.	76.5
Insurances	938		73.2
Payments to athletes	786		5.2
Taxes of all kinds	694		27.5
Accruals	584		13.0
Tax consultant, accountant, notary; registration in the association register	303		31.0
Gema-fee	108		28.1
Other expenses ¹⁵	1,357		12.9

Regarding the revenues of sports clubs in Germany, the highest revenues are generated from (1) membership fees, (2) donations, (3) sports events, (4) public subsidies from the district/community, and (5) self-managed restaurants. Compared to 2012, significant changes in revenues could only be observed for membership fees. Revenues generated from membership fees have increased on average by more than 5 % (see Tab. 16).

Tab. 16: Sports clubs' revenues in 2014 and their development (n.a.=not available 2013/2014).

Revenues from	Mean (in €)	Index mean (2013=0)	Share of clubs with revenues in this area (in %)
Membership fees	17,168	+5.4***	100.0
Donations	3,516		74.3
Sports events (revenues from entrance fees, etc.)	1,560		35.9
Subsidies from the district/community	1,502		48.6
Self-managed restaurants	1,391		15.0

¹⁵ Named as other expenses were for example: depreciation, costs for education and training, bank fees, water and energy costs, emphyteusis, presents for members/volunteers, homepage, maintenance, lease, trophies/prize cups, repairs, referees, entry fees, veterinarian, training camps, club magazine/newspaper, promotion/advertising.

Revenues from	Mean (in €)	Index mean (2013=0)	Share of clubs with revenues in this area (in %)
Convivial gatherings (e.g. club socials)	1,200		35.3
Sports course fees	1,193		17.4
Subsidies from sports organisations: confederations at regional and local level	1,103	n.a.	47.2
Cost-related services for members (e.g., fields, sports hall rent)	965		11.7
Sponsorship from boards	846		20.8
Revenues from rent	764		14.3
Sponsorship from jersey and equipment	550		12.1
Sponsorship from print advertisements	431		13.7
Cost-related services for non-members	431		11.8
Raising of credit	419		2.0
Subsidies from the federal state	412		17.9
Business operations	328		3.3
Subsidies by support association	324		6.1
Fund management (e.g., revenues from interest)	294		23.1
Subsidies from sports organisations: federations	262	n.a.	15.6
Admission fees	256		26.9
Revenues from services for cooperation partners	118		3.9
Subsidies from other support programmes (e.g., employment bureau)	71		2.7
Sponsorship from broadcasting	34		0.2
Subsidies from the European Union (e.g., EU Structural Funds, SOCRATES, LEONARDO, JUGEND)	12		0.3
Other revenues ¹⁶	1,698		13.2

¹⁶ Named as other revenues were for example: wastepaper collection, selling of drinks, refunds from health insurance, rent, photovoltaics, tombola, sales (e.g. selling sport equipment).

4 Methodology

4.1 Background

The Sport Development Report – “Analysis of the situation of sports clubs in Germany” presents an advancement of the former financial and structural analysis of sports in Germany (FISAS). The objective is to provide policy-makers in organised sports as well as decision-makers in sports politics and administration with managerial and political information (knowledge of argumentation and knowledge of action). With the aid of this support, the competitive ability of organised sports should be sustained in times of a dynamic social change. This project is financed by the 16 land sports confederations, the German Olympic Sports Confederation (GOSC) as well as the Federal Institute of Sport Sciences (BISp)¹⁷. On July 7th in 2011 Univ.-Prof. Dr. Christoph Breuer from the Institute of Sports Economics and Sport Management of the German Sport University Cologne was assigned to carry out the fourth, fifth, and sixth wave of the Sport Development Report. The central methodological idea was to create a panel design, which means that the same sports clubs should be questioned on their situation every two years. Therewith, the first six waves of the Sport Development Report (2005/06, 2007/08, 2009/10, 2011/12, 2013/14 and 2015/16) present systematic information about the sports clubs’ development for the first time.

4.2 Sample and response rate

This survey was carried out by means of an online survey, so there was no change in methods compared to the first five waves. The survey was carried out from September 17th 2015 to December 8th 2015. The sample was based on the e-mail addresses of sports clubs that were provided by the federal sports confederations. Out of the 90,240 existent sports clubs in Germany (DOSB, 2015), 78,800 addresses were made available and 78,794 of these clubs were contacted via e-mail. Sports clubs that could not (due to false e-mail addresses) or would not participate for whatever reasons were taken out of the sample (2,949). Altogether, n=20,546 interviews could be realised, which equals a response rate of 27.1 % (see Tab. 17). Compared to the fifth wave in 2013/2014¹⁸ the sample size has slightly decreased (-1.4 %).

¹⁷ Reference Number IIA1-081801/11-17.

¹⁸ In 2013/2014, n=20,846 sports clubs participated in the survey.

Tab. 17: Sample of the Sport Development Report 2015/2016 for Germany.

Sport Development Report 2015/16	N	Share of Sample I (in %)	Share of Sample II (in %)
Population	90,240		
Sample I	78,794	100.0	
False e-mail addresses, person is not part of the club anymore, club no longer exists/or in the process, refusal	2,949		
Sample II	75,845		100.0
Realised Interviews	20,546		
Participation (in %)	22.8	26.1	27.1

4.3 Weighting

The data analysis has been conducted with weighted values to represent the population of the German sports clubs in a representative way. For this purpose, the data of the population as well as the sample have been segmented into groups by the size of the club according to membership numbers. Overall, the clubs have been segmented into five groups (under 100 members; 101 to 300 members; 301 to 1,000 members; 1,001 to 2,500 members and above 2,500 members). Next, the distribution of the groups in both the population data set and the sample data set has been identified. This procedure has been conducted for all federal sports confederations. In a next step, a weighting factor for all cases, based on the distribution by size classes both in the population and the sample, has been determined. Finally, the sample has been weighted by this factor for the final analyses. This procedure was applied to the cross-sectional dataset and to the longitudinal dataset (see section 4.4).

The so called “system perspective” was used for the first time to illustrate to what extent sports clubs members are affected by existential problems. For this purpose, clubs were additionally weighted by number of members in relation to the average number of members of all sports clubs so that the dataset was representative for all sports clubs members in Germany rather than sports clubs. In a first step, a quotient of the number of members of each sports club and the average number of members in the dataset was estimated. In a second step, the above explained weighting factor was multiplied by this quotient. This product was then employed as weighting factor for the analysis of the system perspective.

4.4 Longitudinal data and calculation of indexes

With regard to the construction of a longitudinal database, all sports clubs were given an ID number. The number makes an identification of the sports clubs possible that participated in the respective surveys. Altogether, n=8,376 sports clubs participated in both the 2013 and 2015 survey (fifth and sixth wave). This is equivalent to a retain-quota of 40.2 %.

Beginning with the second survey of the Sport Development Report, changes of the common welfare production as well as of the problems of German sports clubs can be measured based on the longitudinal dataset. Throughout the presented sixth wave of the Sport Development Report developments are measured between 2013 and 2015.

The extent of the development is quantified with the help of indexes, which show the percentage changes. The calculation of the indexes is based on the value of the respective base year. For example, an index of +12 implies that (in the longitudinal dataset) the value in question has increased by 12 %. In the tables and figures, the base year (year of the survey) is depicted by the label "Index (2013=0)" which refers to the Sport Development Report 2013/14 (fifth wave). With reference to indexes it is important to recall that indexes can be large even if developments were small (e.g. the change of a value from 0.5 % to 1.5 % would result in an index of +200).

Moreover, it was checked whether the changes were statistically significant (test of significance: t-test). The underlying report will only present the significant indexes. The probability of error is important in order to determine the significance which is demonstrated with the common designation (see Tab. 18).

Tab. 18: Overview of the probabilities of error in statistical calculations and their designations.

Symbol	Meaning
*	Significant, the probability of error of the calculation is equal/less than 5 %
**	Very significant, the probability of error of the calculation is equal/less than 1 %
***	Highly significant, the probability of error of the calculation is equal/less than 0.1 %

4.5 Data analysis – Sports clubs finances

The analysis in chapter 3.3 of this report is based on the financial reports of the sports clubs. It is necessary to mention that the information is based on the financial year before the survey. Therefore, the financial information in the Sport Development Report 2015/2016 is based on the financial year 2014.

During the analysis of the financial data parts of the sample appeared to be biased. Partially, financial information was provided in a non-comprehensible way. This affects the revenues as well as the expenses. For that reason, like in the previous five waves of the Sport Development Report, a finance filter was applied for the analysis of the club finances. To obtain reliable results, the following criteria were applied retrospectively.

(1) Revenues from membership fees > (Number of members * € 0.50),

(2) $4 > \text{Revenues/Expenses} > 0.25$.

In the sixth wave, n=14 outliers were banned for not fulfilling the criteria with respect to their club finances. With this quality filter it was possible to lower the variance significantly. Overall, that applies to 94.7 % of the clubs which provided information about their club finances in the sixth wave. The analysis is based on only those clubs that fulfil the named criteria.

5 References

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