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Sports clubs in Germany: More than just exercise

Key results of the 7th wave of the Sport Development Report (2017/2018)
and selected developments over the last 15 years



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1 Summary - the most important facts in brief



The sports club landscape in Germany has a broad base, with approximately 90,000 sports clubs. A total of about 27 million club memberships are recorded, which corresponds to about one third of the German population¹.

This report provides an overview of the key results of the seventh wave of the Sport Development Report (SDR) 2017/2018² as well as selected comparisons to results of previous waves (Sport Development Report 2005/2006 - 2015/2016).

As part of the seventh wave, in addition to the sports clubs themselves, i.e. the organisations, various stakeholder groups of the clubs, both at executive and implementation level, were surveyed online for the first time.

Of the 89,594 sports clubs that existed in Germany in 2017³, 19,889 sports clubs took part in the seventh-wave club survey in autumn 2017, which corresponds to a response rate of 25.7 %. The club sample was weighted on the basis of club size and federal states in such a way that it corresponds to the population of the 89,594 sports clubs in Germany, i.e. is representative of the population of sports clubs in Germany on the basis of the above factors. 4,631 board members and 6,752 coaches and trainers took part in the stakeholder surveys (cf. Fig. 1).

1 This is the result of the annual statistics 2017 by the German Olympic Sports Confederation (DOSB).

2 Detailed results in the following publications: Breuer, C. & Feiler, S. (2019). *Sports clubs in Germany: Organisations and internal stakeholders. Sport Development Report for Germany 2017/2018 - Part 1*. Bonn: Federal Institute of Sport Science. Breuer, C. & Feiler, S. (2020). *Coaches and trainers in sports clubs in Germany. Sport Development Report for Germany 2017/2018 - Part 2*. Bonn: Federal Institute of Sport Science. Breuer, C. & Feiler, S. (2020). *Board members in sports clubs in Germany. Sport Development Report for Germany 2017/2018 - Part 3*. Bonn: Federal Institute of Sport Science.

3 Cf. DOSB Annual Statistics 2017.

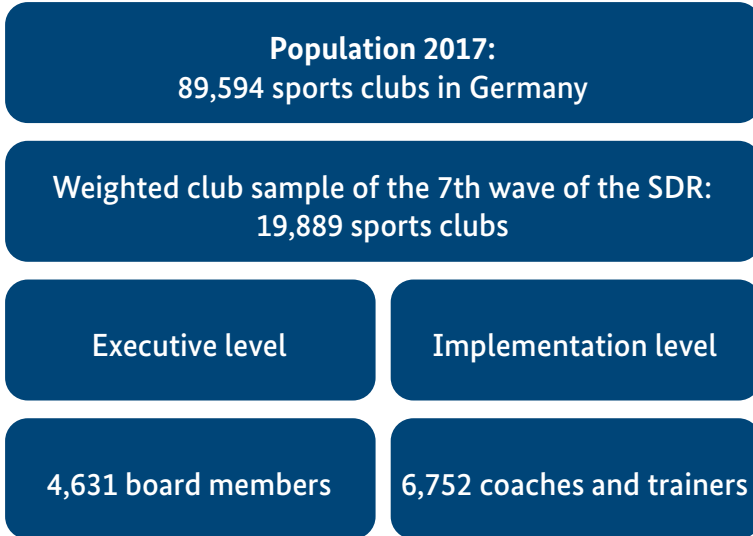


Fig. 1: Population and participating sports clubs and stakeholders in the seventh wave of the Sport Development Report (reference year 2017).

The central statements that can be derived from the results of the Sport Development Report are as follows:

Programmes and services

- › In addition to traditional competitive sports, sports clubs in Germany offer a wide range of sports, e.g. in health sports or through programmes for refugees. In order to reach as many population groups as possible, sports clubs in Germany offer their services at low membership fees, which have hardly increased over time.

- › The quality orientation of the services offered by sports clubs is high despite the low fees. Four out of five clubs strongly or tend to agree with the statement that they attach importance to the qualification of their trainers and coaches. The quality orientation is based on a differentiated educational system of federations and confederations. In total, around 60 % of coaches and trainers have a currently valid licence from a federation or state sports confederation. More than half of the board members have formal or non-formal qualifications for their activities.
- › In addition to pure sports programmes, sports clubs in Germany also offer an important space for social exchange. In 2017, for example, more than 93 % of the clubs organised festivals, celebrations, and social events. In addition, 62.5 % of the clubs have spaces for meetings (e.g. a clubhouse or a club restaurant).

Importance of honorary and volunteer work

- › Sports clubs in Germany are characterised above all by volunteer work, which is carried out at both the executive and implementation levels. In 2017 a total of about 1.7 million people were engaged in voluntary positions in sports clubs, however, there has been a slight downward trend compared to 2015.
- › In addition, there are the numerous volunteer helpers who support the clubs without being tied to a fixed position, e.g. at club parties, sports events, by providing driving services, and for renovations, etc. In 2015, just

under a quarter of the club members were volunteer helpers, which extrapolates to a figure of around 6.3 million volunteer helpers. According to these numbers, a total of around 8 million people were involved in sports clubs on a volunteer basis in 2015.

- › Volunteer coaches and trainers commit a total of around 10.8 million hours per month to the sports clubs. For the volunteer board members and cash auditors, the monthly commitment amounts to around 13 million hours.
- › Through their commitment, volunteer board members, coaches, and trainers together generate an annual added value of approximately € 4.3 billion. This number does not include the voluntary commitment of the referees and officials and the time invested by volunteer helpers.

Board members predominantly older and male compared to coaches and trainers

- › Board members in sports clubs tend to be older (53 on average) than coaches and trainers. Managerial positions (e.g. chairperson, president) in particular are filled by older people.
- › Women are underrepresented on the boards. Women most frequently hold the position of secretary, and are least likely to be club chairpersons.

- › Coaches and trainers in sports clubs in Germany are slightly younger compared to board members with an average age of about 45 years.
- › A total of around 606,600 volunteer coaches and trainers are involved in sports clubs in Germany. The gender distribution is more balanced among coaches and trainers than among board members, although there is a higher proportion of male than female volunteer coaches and trainers compared to part-time and full-time employees.

High continuity of volunteer commitment

- › On average, board activities are carried out for 12 years, with about 8 % of the board members having been active in a volunteer capacity as a board member for more than 30 years.
- › This shows a high continuity of the volunteer commitment of board members in sports clubs and the enormous binding power of organised sport.

Satisfaction of board members, coaches, and trainers is largely very high

- › Both coaches and trainers as well as board members are largely satisfied with their activities and plan to continue them in the future.

- › In terms of satisfaction, future planning, and motivation, however, there are differences on the basis of gender, age structure, and educational level of the volunteers.

Support benefits offered to the volunteers by the clubs

- › In order to support the volunteers in carrying out their tasks and to ensure the provision of high quality sports programmes, the clubs rely most heavily on the takeover of costs for further and advanced training, although these support measures are somewhat more frequently offered to coaches and trainers than to board members.
- › The clubs also offer their volunteers financial support in the form of expense allowances and travel allowances. However, on average, material incentives play only a minor role in motivating coaches and trainers as well as board members.

Qualification is important - Caretakers promote willingness to take part in further training

- › Qualifications are of great importance, both for the club and for the volunteer board members as well as coaches and trainers themselves, because:
- › Volunteers with a qualification are:
 - » more motivated

- » feel more competent
 - » show a higher willingness to take part in further training
 - » receive higher expense allowances
 - » are more satisfied with their own performance
- › Training for the activity as a board member and coach or trainer is therefore important not only to obtain the necessary qualifications, but also to feel personally more confident in carrying out the activity.
 - › A qualification benefits both the individuals themselves and the clubs. The aim of clubs and sports associations should therefore be to convince coaches and trainers of the value of qualification.
 - › The willingness to acquire qualifications can be increased by having a contact person in the club who is responsible for further and advanced training, a caretaker. Such a person is present in about 41 % of the clubs.

Infrastructure: Use of own and public sports facilities

- › Sports clubs in Germany use both club-owned facilities (40.9 % of clubs) and public (mainly municipal) sports facilities (63.5 % of clubs).
- › About half of the clubs that use municipal facilities have to pay a fee to use them.

Club Finances

- › The financial situation of sports clubs in Germany is largely stable. In 2016, almost three quarters of the clubs state that their revenue exceeds their expenditure. However, this proportion is slightly lower than in the previous wave of the Sport Development Report (2014).
- › As in previous years, the main sources of revenue are membership fees and donations. These sources of revenue have increased significantly since 2014.
- › Altogether, the revenue from the non-material area of the clubs, i.e. from membership fees, admission fees, donations, and grants, makes up almost three quarters of all revenue.
- › Sports clubs in Germany spend most of their money on core sports operations. The largest expenditure item is for coaches, trainers, and sports instructors, which has increased significantly compared to 2014.
- › Proportionally, most of the expenses are for sports operations and personnel.

Challenges for sports clubs, especially in terms of personnel

- › While around two thirds of the clubs in Germany assess their financial situation as not or only slightly problematic in 2017, clubs continue to face increasing personnel problems.

- › In this context, the retention and recruitment of volunteer functionaries should be mentioned in particular, which are classified as large or very large problems by more than half of the clubs.
- › However, member retention and recruitment is also a growing challenge for sports clubs in Germany.
- › In total, just under 38 % of the clubs state that their existence is threatened by at least one problem, whereby the perceived threat to existence comes in different degrees depending on the size of the club. Significantly more very small clubs with up to 100 members feel their existence is threatened by at least one problem than is the case for larger clubs.

2 Initial situation - background of the Sport Development Report



The Sport Development Report for Germany, which has been conducted since 2005 under the direction of the German Sport University Cologne, represents a further development of the Financial and Structural Analyses of German Sport (FISAS). The aim of the nationwide survey of sports clubs in Germany is to provide decision-makers in organised sport with knowledge for argumentation and action. The aim is to strengthen the competitiveness of organised sport, which is confronted with a wide range of problems as a result of social developments such as individualisation, increased commercialisation, and a changing working environment.

The seventh wave of the Sport Development Report represents a further expansion over the previous reports, as central stakeholders were surveyed in addition to the clubs themselves. The present report therefore contains the results of the club survey as well as the results of the survey of coaches and trainers as well as board members. The stakeholder surveys will be continued in the following waves and include a survey of club members as well as referees and officials in the next wave. The aim of the stakeholder surveys is to generate further knowledge about the individual assessments and motivations of the groups of people and to provide clubs with actionable knowledge to tackle their problems.

The Sport Development Report is financed by the Federal Institute of Sport Science (BISp), the German Olympic Sports Confederation (DOSB), and the 16 state sports confederations (LSB).

At this point, special thanks go to all those sports clubs that participated in the 2017 survey and also agreed to forward the supplementary questionnaires to their trainers and coaches as well as board members. Further thanks also go to the coaches and trainers and the board members who took the time to participate in the stakeholder surveys. Through their commitment and perseverance, it was possible to gain valuable insights into the background of the predominantly voluntary and honorary work in sports clubs in Germany.

3 Structure and development of sports clubs in Germany



With almost 90,000 sports clubs, Germany has a broad base of organised sport

In order to give a short overview of the sports club landscape in Germany, we will first take a look at the overall population of sports clubs in Germany.⁴ For this purpose, we use the DOSB's annual survey (in this case for 2017⁵).

In the reference year for the club survey, i.e. 2017, there were a total of 89,594 sports clubs and around 27.4 million club memberships in Germany. In 2017, the degree of organisation of the population in the member organisations of the DOSB was 33.2 %. However, the degree of organisation differs considerably between the federal states (cf. Fig. 2), and there are particularly clear differences between the new federal states, i.e. the former eastern part of Germany (German Democratic Republic, GDR) and old federal states, i.e. the western part of Germany (Federal Republic of Germany, FRG). Brandenburg (former GDR) had the lowest degree of organisation in 2017 with 13.7 %, while in Saarland (FDR) almost 37 % of the population living there were members of a sports club.

Comparing the number of sports clubs and memberships with the first year of the Sport Development Report, i.e. 2005, no major changes are apparent. According to the DOSB annual survey, there were 89,870 clubs and 27.2 million memberships in 2005, which corresponded to a degree of organisation of about 33 %. The blanket assumption of the death of clubs in Germany over the last 15 years can therefore not be confirmed.

4 The figures presented in this section therefore refer to the population of sports clubs, not to the club sample of the Sport Development Report.

5 See DOSB (2017). *Annual Survey 2017*. Frankfurt/Main: German Olympic Sports Confederation.

Many very small clubs in Germany

The average size of sports clubs in Germany is around 267 members, with differences specific to the individual federal states, similar to the degree of organisation (cf. Fig. 2). The largest average sports club size is in Hamburg (around 559 members on average), while the smallest sports clubs are in Thuringia (108 members on average). The other German city-state, Bremen, is also above the national average with an average of 391 members, as is Berlin with an average of 298 members per sports club.

The largest share of sports clubs in Germany consists of very small clubs with up to 100 members (46.6 %; cf. Table 1). Only 4.3 % of sports clubs have more than 1,000 members. However, the largest absolute number of members is contained in medium-sized sports clubs with 301 to 1,000 members. These clubs represent almost 40 % of all club members, while the next largest (1,001 to 2,500 members) and next smallest (101 to 300 members) club sizes are each home to around one fifth of the club members in Germany.

If we look at the development of the average club size using longitudinal data, a slight but not significant decline in the average club size over the last 12 years can be observed.

Table 1: Club sizes of the sports clubs in Germany.

Club size (number of members)	Share of clubs (in %)	Share of members (in %)
up to 100	46.6	7.9
101-300	29.3	19.5
301-1,000	19.8	39.1
1,001-2,500	3.7	19.8
over 2,500	0.6	13.7

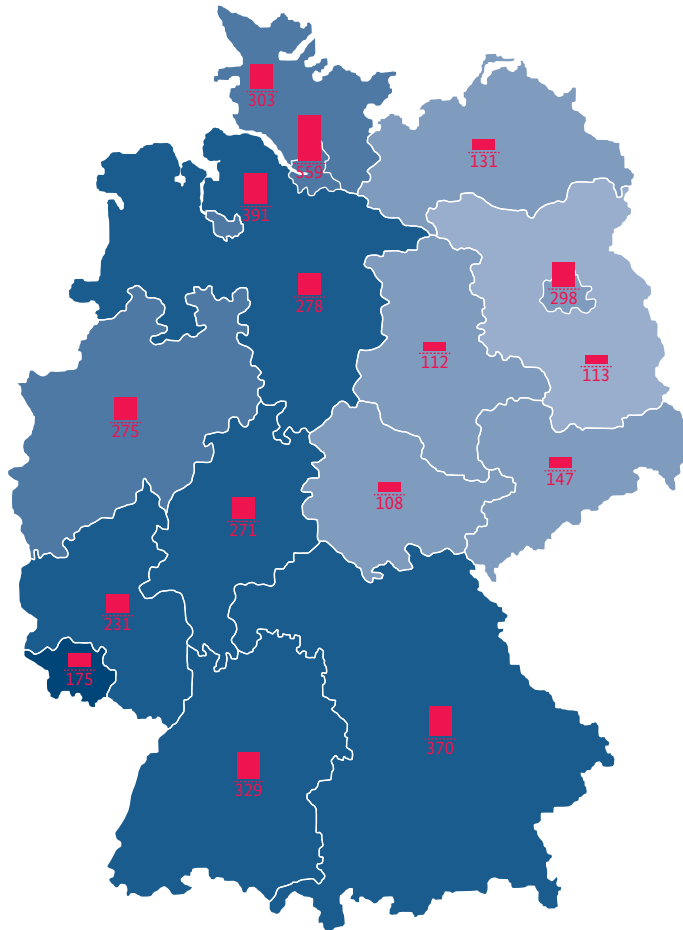


Fig. 2: Degree of organisation (darker colour: higher degree of organisation) and average club size by members (bars).

Sports clubs in Germany: More than just exercise

Sports clubs in Germany have tradition

In order to be able to describe further structural characteristics of sports clubs in addition to club size, the survey in the seventh wave of the Sport Development Report asked the clubs about their founding year and the organisational form of the club. The evaluation of the club sample shows that just under 62 % of the clubs in 2017 were single-section clubs, i.e. clubs that consisted of one sports department, while the remaining 38 % were clubs with a number of sections, i.e. with more than one sports department (multi-sports clubs). It also shows that sports clubs in Germany can already look

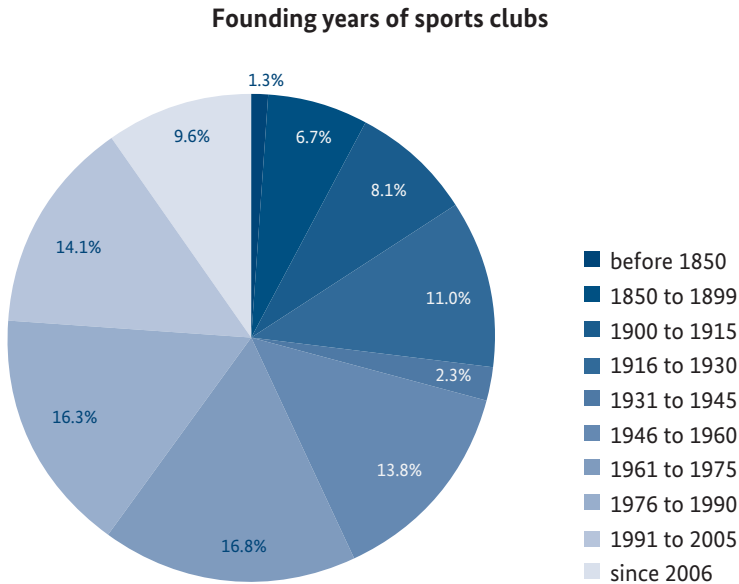


Fig. 3: Founding years of sports clubs in Germany.

back on a long history, but that new sports clubs have also been founded in the recent past. Thus, the founding years of the clubs vary from before 1850 (1.3 % of the clubs) to the recent past (cf. Fig. 3).

Football remains the No. 1 sport in Germany

If we look at the associations as a further structural unit of organised sport in addition to the clubs, it is apparent that the association with the largest number of members is the German Football Association (DFB) with around 7 million members. Other associations with a large membership are the German Gymnastics Federation (DTB, almost 5 million members), the German Tennis Federation (DTB, 1.4 million members), the German Shooting Federation (DSB, 1.3 million members), and the German Alpine Club (DAV, 1.1 million members). In comparison to the beginnings of the Sport Development Report, it is apparent that the memberships of the Football Association and the Alpine Club have increased over the last 15 years, while the Gymnastics Federation, Tennis Federation, and Shooting Federation have seen memberships decline⁶. This can be deduced from the DOSB annual surveys. The increases in the German Football Association are partly attributable to increases in passive members (e.g. fan clubs) among the core clubs in professional football.

6 The developments relate to the central German associations, i.e. at federal level.

Strong commitment to the community and democratic participation

If the sports clubs in Germany are asked about their self-conception, i.e. what is most important to them in their club, it becomes clear that the clubs attach particular importance to community and democratic participation in the club. 94 % of the clubs strongly or somewhat agree with the community idea, while almost 90 % state that they attach (very) strong importance to democracy. In addition, almost 80 % of the clubs attach importance to the qualification of their coaches and trainers and almost 90 % state that they want to improve on what they have done so far. This illustrates the high-quality orientation of the clubs (cf. Fig. 4).

The commitment to children's and youth sports is also quite high. About three quarters of the sports clubs agree that they are involved in this area, while the involvement in sports for senior citizens, girls, and women is on average somewhat less pronounced, even though more than half of the clubs still state that they are (strongly) involved in these areas (cf. Fig. 4 and Fig. 5).

A high level of involvement in children's and youth sport is probably related to the likewise very high degree of organisation of this age group in sports clubs. According to the 2017 DOSB annual survey⁷, about 80 % of the 7- to 14-year-old male population in Germany are members of a sports club as are around 61 % of girls in the same age group. However, the degree of organisation decreases considerably in young and middle adulthood and is least pronounced in the age group over-60 (27.3 % for men and 15.1 % for women). In view of demographic change, in this case the increasing number of older people in the population, there is potential for clubs to gain new members, especially in the age group over-60, and to expand their involvement in senior citizens' sport.

7 See DOSB (2017). Annual Survey 2017. Frankfurt/Main: German Olympic Sports Confederation.

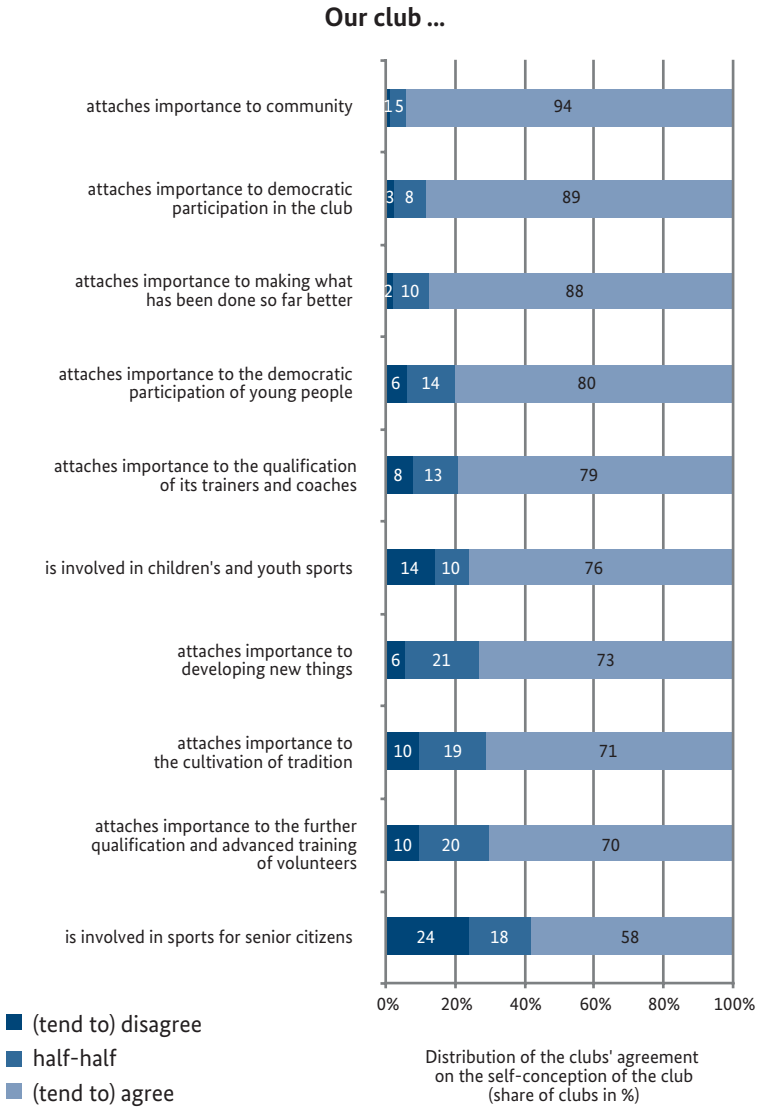


Fig. 4: Self-conception of sports clubs (Part 1).

Child protection, doping prevention, and the prevention of match or competition collusion

In addition to the many positive effects they generate, sports clubs are also confronted with the dark sides of sport. These include doping, match and competition collusion, and sexualised violence. To counter these problems, almost half of the clubs (at least somewhat) agree that they are involved in the field of child protection and the prevention of sexualised violence. It is striking, however, that only about 29 % of the clubs state that they are (at least somewhat) involved in the prevention of match and competition collusion and in doping prevention (cf. Fig. 5). A possible explanation might be that only a certain number of clubs participate in high-performance and competitive sports and that these issues are therefore not relevant for all clubs. Nevertheless, clubs play an important role in prevention work as they provide access to the competitive sports system.

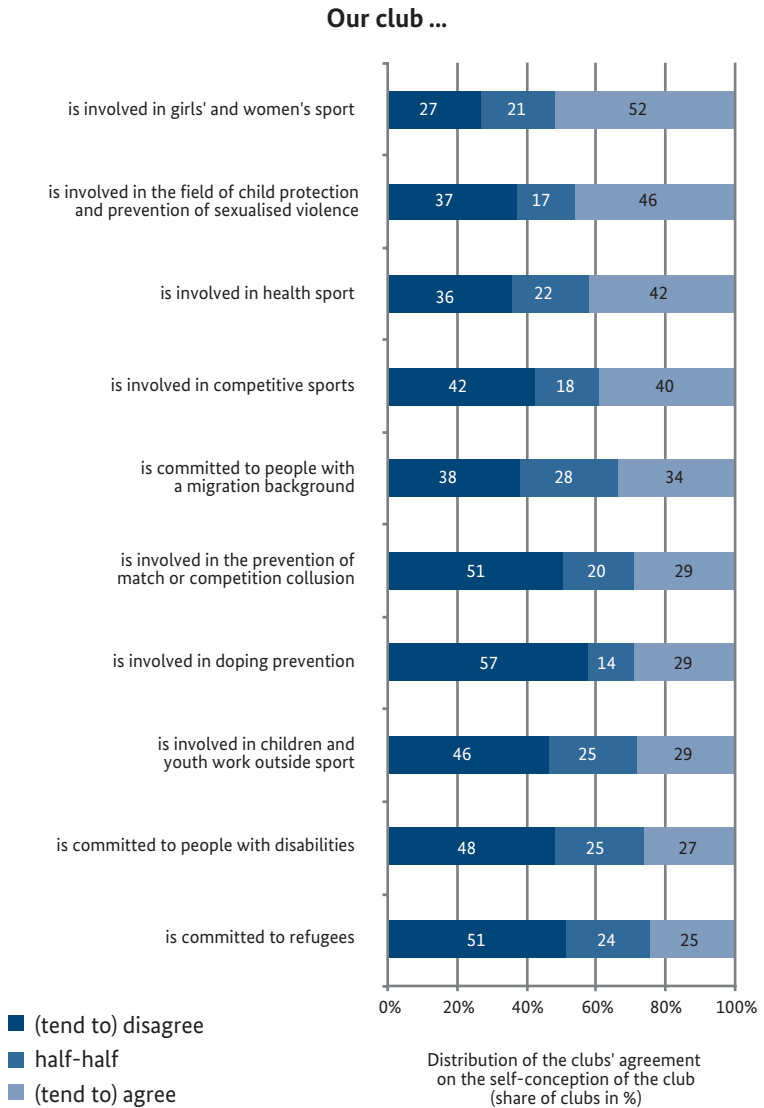


Fig. 5: Self-conception of sports clubs (Part 2).

4 Programmes and services



Wide range of sports

The sports clubs in Germany offer their members a wide range of sports activities. In 2017, the average number of sports offered in the clubs varied from one sport to 45 sports, with an average number of around three sports. In addition to classic competitive sports such as football, handball, swimming, or athletics, trend sports such as slacklining, parkour, or freerunning are also offered. The most frequently represented sports in the club sample in 2017 were football, gymnastics, table tennis, tennis, volleyball, and shooting. Sports clubs are also expanding their offerings in health sports.

Clubs as the basis for talent scouting and promotion as well as competitive sports

In addition to the wide range of programmes in mass sports, sports clubs play an important role in competitive sports. According to the DOSB concept for young athletes, they form the basis for talent scouting and promotion and are responsible for the basic training of young athletes⁸. Around 15 % of sports clubs in Germany had squad athletes (A, B, C, D/C, D squads) in their ranks in 2017. This share has increased significantly compared to the sixth wave of the Sport Development Report. In addition, almost 29 % of the clubs indicate that athletes from their club have been called into a selection. It is therefore evident that competitive sport continues to play an important role in sports clubs in Germany and that almost one third of the clubs are integrated into the competitive sports system.

8 See DOSB (2014). *Nachwuchsleistungssportkonzept 2020. Unser Ziel: Dein Start für Deutschland*. Frankfurt/Main: German Olympic Sports Confederation.

Slight increase in health-related programmes

Compared to 2015, sports clubs in Germany are becoming increasingly involved in health sports. Almost one third of the clubs offer health-related programmes. This corresponds to an increase of about 9 % compared to the sixth wave of the Sport Development Report in 2015. Health-related programmes include general health sports, such as Nordic walking and gymnastics, but also programmes in rehabilitation, tertiary prevention, and programmes for people with disabilities and chronic diseases.

In 2017, an average of almost 12 % of all programmes offered by sports clubs in Germany were health-related. This share has risen by almost 10 % compared to 2015.

Complementary sports and non-sporting activities offered by clubs

In addition to pure training and competition, sports clubs in Germany also organise other sporting activities for their members, both independently and in cooperation with partners. Training camps, sports festivals, excursions, hiking days, tournaments, and mass sports events as well as holiday camps play a major role. In addition, just under 13 % of sports clubs are involved in testing for the German sports badge and just under 9 % of clubs are involved in the organisation of running events, such as city races (cf. Fig. 6).

In addition, more than 93 % of sports clubs issued invitations to social events, festivities, or celebrations in 2016. This result underlines the fact that sports clubs are not just a place for physical

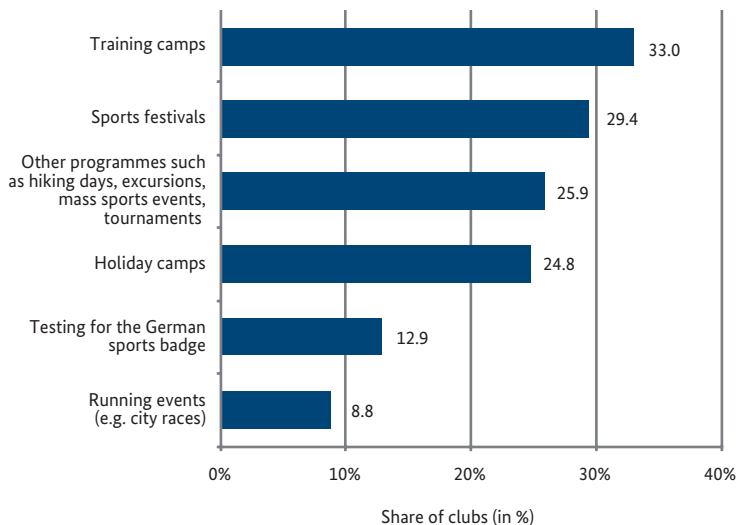


Fig. 6: Complementary sports and leisure activities offered by clubs.

exercise, but are often a place for social interaction, contribute to community development and have a high capacity for social integration for a wide range of population groups. Sports clubs therefore play an important role in society.

In this context it is also apparent that board members as well as coaches and trainers in sports clubs in Germany are, on average, better socially connected than the average population. The board members state that they have an average of seven close friends, the coaches and trainers have an average of six close friends, while the German average for the year 2017 was around four close friendships⁹.

9 Socio-Economic Panel database (SOEP 2017).

Integrative power of the clubs

Sports clubs are generally considered to have a strong integrative power. This can be achieved on the one hand by offering low-threshold sports for a broad section of the population, and on the other hand by providing special integration programmes. It is apparent that about 9 % of sports clubs in Germany had included special programmes or measures for refugees in their programme at the time of the 2017 survey. In addition, refugees took part in the regular programmes of almost 30 % of the clubs giving them the opportunity for social exchange. The active role of the clubs in integration work is further illustrated by the fact that 11 % of the sports clubs

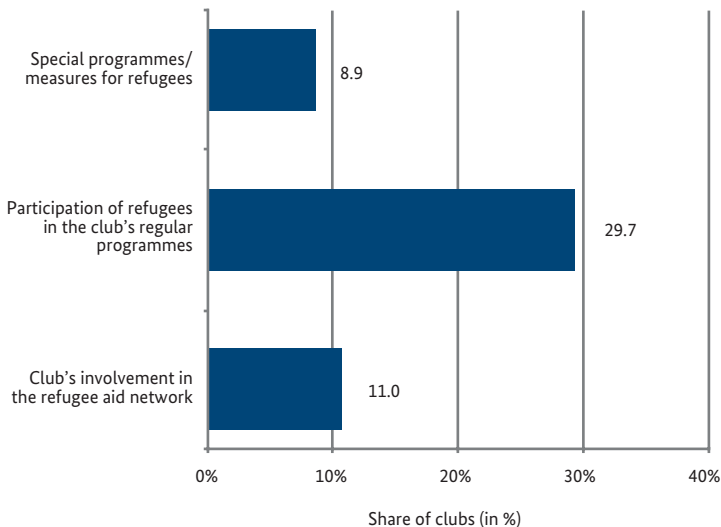


Fig. 7: Integration work by clubs for refugees (2017).

are involved in the refugee aid network (cf. Fig. 7). It is therefore evident that many clubs are actively addressing and shaping their role as a driver for integration and are assuming social responsibility in a further field.

5 Volunteer and paid work in sports clubs



Volunteering is an important economic factor for the German economy

Volunteer work is carried out without remuneration. Nevertheless, volunteers may receive an expense allowance for their activities. For coaches and trainers, this is tax-free up to an annual amount of € 2,400 (the so-called trainer allowance). For the volunteer board members, the so-called volunteer allowance amounts to € 720 per year (the reference year is 2017 in each case).

The work performed by volunteers is not included in the overall economic performance of the Federal Republic of Germany. However, an attempt to determine the value of volunteer work shows that volunteers in Germany's sports clubs generate considerable added value.

For example, the average monthly commitment of board members to sports clubs in Germany is between nine and 26 hours, depending on the board position. This results in a total monthly commitment of around 13 million hours. If one were to pay an average of € 15 per hour for this time, this would result in a monthly added value of around € 194.8 million. This corresponds to an annual added value of around € 2.34 billion generated by the board members of sports clubs in Germany.

A similar picture emerges with regard to the added value of volunteer coaches and trainers. On average, they invest about four hours per week in their commitment in the sports club, which results in a total weekly commitment of around 2.5 million hours and a monthly commitment of around 10.8 million hours. This corresponds to a monthly added value of around € 162.5 million or an annual added value of around € 1.95 billion from the volunteer coaches and trainers in sports clubs in Germany.

As a result, volunteer coaches and trainers as well as board members in sports clubs in Germany generate a total of almost € 4.3 billion. However, this sum should be treated with caution, as

it is based on projections and data from stakeholder group surveys, which are considered non-representative, and may therefore only reflect an approximation of the actual added value of volunteering in sport.

However, it should also be noted that these projections do not yet include the amount of work carried out by the volunteer referees and officials, nor the time invested by the volunteer helpers who support the clubs free of charge during special work assignments such as club parties, sports events, or driving services. If we refer to the data collected in the sixth wave of the SDR, the total number of volunteer helpers in sports clubs in Germany in 2015 was around 6.3 million. In total, this means that in 2015 there were about 8 million honorary and volunteer employees in sports clubs in Germany.

Volunteer positions and their development

The sports clubs in Germany are mainly based on the volunteer commitment of their members. In 2017, almost 1.7 million members were involved in volunteer positions. This volunteer commitment can be carried out on the executive or implementation level (e.g. as a coach, trainer, or referee). In the sports clubs in Germany, there are an average of 8.4 positions at the executive level and 8.7 positions at the implementation level. In addition, there are on average just under two cash auditors, whose number has increased compared to 2015. On the other hand, the total number of occupied volunteer positions has decreased slightly (-4%).

It is apparent that proportionately more men than women volunteer in sports clubs in Germany. A total of around 1.1 million men and almost 550,000 women are involved in sports clubs on a voluntary basis. On average slightly more women are involved at the implementation level, i.e. among coaches and trainers as well as

referees and officials, than at the executive level (cf. Table 2). However, the number of male volunteers has fallen slightly compared to 2015 (-6.2%).

Table 2: Volunteer commitment in sports clubs.

Number of volunteers	Mean value	Total
at the executive level	8.4	752,600
...of which male	5.8	519,700
...of which female	2.6	232,900
at the implementation level	8.7	779,500
...of which male	5.7	510,700
...of which female	3.0	268,800
Cash auditors	1.7	152,300
...of which male	1.2	107,500
...of which female	0.5	44,800
Total	18.8	1,684,400
...of which male	12.7	1,137,900
...of which female	6.1	546,500

If we use a longer period of time to examine the development of the number of volunteer positions in sports clubs (2005 to 2015), then a consideration of the individual cross-sections of the Sport Development Report of the first six waves, i.e. the individual six surveys (which may well differ in the composition of the participating clubs), shows no consistent trend regarding the development of the number of occupied volunteer positions in sports clubs. However, an analysis of a purely longitudinal dataset of the first six waves of the Sport Development Report (2005 to 2015), i.e. looking at the

same clubs that participated in all six waves, showed that there were no significant changes in the total number of volunteer positions during the period mentioned, although there was a slight decline in volunteer positions at the executive level¹⁰. However, the relatively small number of cases of the same sports clubs participating in the first six waves must be taken into account in this analysis. 142 sports clubs participated in all of the first six waves of the Sport Development Report, i.e. these clubs were not dissolved during this period, which might indicate an above-average performance of these clubs.

Paid management positions only exist in a few clubs

In order to meet the increased challenges in club management, an average of 6.4 % of sports clubs in Germany rely on a paid management position. These positions are primarily exercised on a part-time basis. However, there are clear and significant differences concerning the existence of such a paid management position, if the analysis is differentiated according to the size of the club. For example, 98 % of the very small clubs with up to 100 members do not have a paid management position, while more than half of the large clubs with more than 2,500 members have a full-time manager (cf. Fig. 8)

Descriptively, a slight increase in the number of clubs with paid management positions can be observed (SDR 2015/2016: 5.7 %; SDR 2017/2018: 6.4 %), even if this change is not significant. If we look at all forms of paid employment, for example in the areas of administration, sports, training, and competition operations, as well

10 See Breuer, C. & Feiler, S. (2017). Sportverein im Wandel - Zur Entwicklung der Sportvereine in Deutschland von 2005 bis 2015. In C. Breuer (Ed.), *Sportentwicklungsbericht 2015/2016. Band I. Analyse zur Situation der Sportvereine in Deutschland* (pp. 243-263). Hellenthal: Sportverlag Strauß.

Paid management position available - by club size

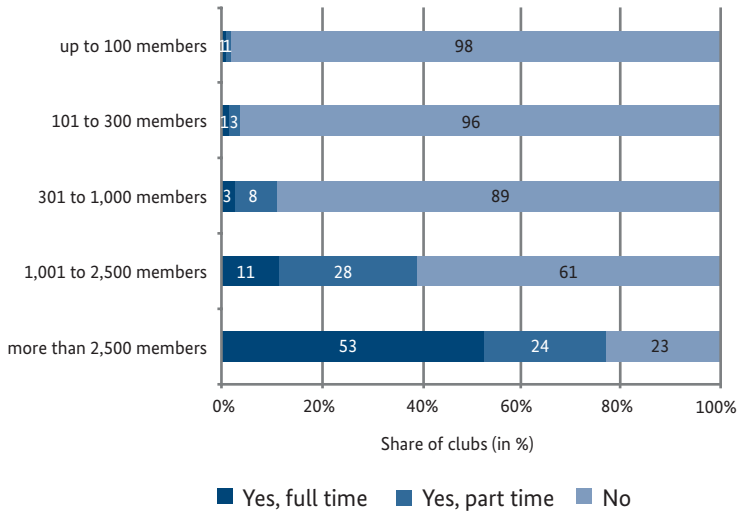


Fig. 8: Share of clubs with a paid management position, differentiated according to the size of the club.

as in technology, maintenance, and care, and analyse the changes in the number of paid employees between 2012 and 2017, the majority of clubs have seen no change in the number of paid employees over the same period (83.5 %). In contrast, 11.8 % of the clubs report a slight or strong increase in paid activity over these five years, while only about 4.7 % of the clubs report a slight or strong decrease in paid activity.

Volunteers in sports are more often male and middle-aged

The results of the stakeholder surveys show that volunteer board members are on average 53 years old and thus on average older than coaches and trainers, who were on average 45 years at the time of the survey (2018).

With regard to the positions that are held, it can be seen that leadership positions such as club chairperson are held by older volunteers, while the position of youth director is held by younger persons on average (average age 40). People who volunteer in youth work therefore tend to be younger than the other board members. The position of youth director is also more frequently held by the

Gender distribution within the board positions

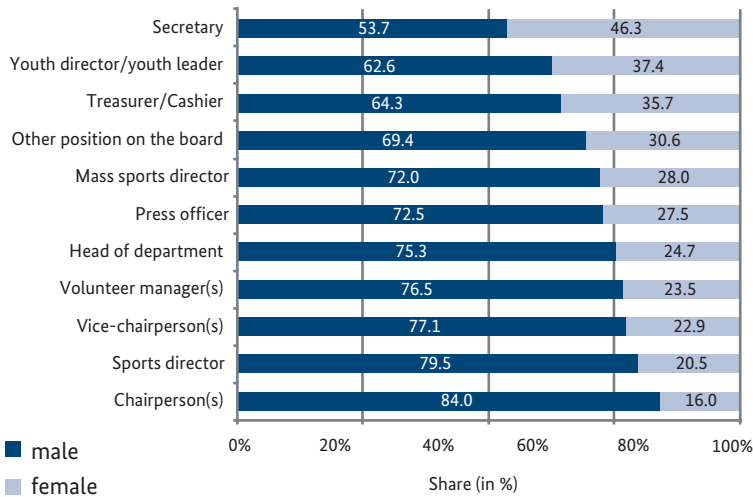


Fig. 9: Proportion of women and men in the individual board positions.

younger age groups of 19- to 26-year-olds and also by adolescents up to the age of 18. This position therefore seems to be a good entry position to introduce young people to volunteer work.

Women are under-represented on the board compared to the average female membership rate per club (35.9 % in 2017) and in relation to the female population share of 50.7 % in the same year with a share of 30.7 %. Women are least likely to hold the positions of club chairperson and sports directors, while the proportion of women, at least in the positions of secretary and youth director, is above the average female membership rate per club (cf. Fig. 9).

These results must be treated critically, especially from a sports management perspective. It is apparent that sports clubs that have women on the board at all, and clubs that have a higher proportion of female board members, have fewer problems in various areas, including member retention, retention and recruitment of coaches and trainers, and finances¹¹. The aim of the clubs should therefore be to attract more women to the various board positions.

In this context, however, it is also apparent that in some sports clubs there is still need for improvement in this area, as in 2017 the proportion of clubs that had women on the board was 77 %, i.e. almost a quarter of sports clubs in Germany had no women on the board at all.

The gender distribution of volunteer coaches and trainers also shows a slight shift in favour of men (58 % male volunteers), but among coaches and trainers working on a part-time basis the proportion of women is higher (58.2 %). Among full-time coaches and trainers, the gender distribution is relatively balanced (50.8 % women).

11 See in detail: Wicker, P. & Breuer, C. (2013). Understanding the importance of organizational resources to explain organizational problems: Evidence from nonprofit sport clubs in Germany. *Voluntas*, 24(2), 461-484; Wicker, P., Breuer, C. & von Hanau, T. (2012). Gender effects on organizational problems - Evidence from non-profit sports clubs in Germany. *Sex Roles*, 66(1), 105-116, and Wicker, P., Feiler, S., & Breuer, C. (2020). Board gender diversity, critical masses, and organizational problems of non-profit sport clubs. *European Sport Management Quarterly*. doi: 10.1080/16184742.2020.1777453.

Situation of the board members

More than half of the board members are trained for their activity

If we look at the training of the board members for their activities, it is apparent that just under 7.5 % of the board members hold a club manager licence. Proportionally more board members hold a license C than a license B. About 27 % have completed a commercial apprenticeship and just under 15 % have completed a degree with a focus on business administration, management, or law. Formal (e.g. a university degree) or non-formal training (licence training of the German

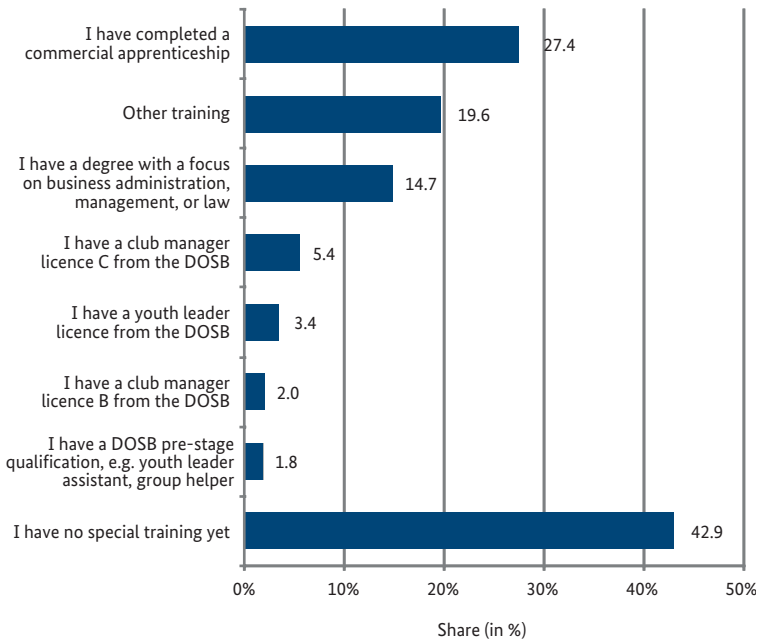


Fig. 10: Qualification/training of the board members.

sports system) for work in sport proves to be beneficial for board activities. However, it is apparent that just under 43 % of the board members have no special training for their activities (cf. Fig. 10).

Qualification of great importance

Qualifications are of great importance, both for the club and for volunteer board members: There are differences between the board members with and without training for their activities, for example, in terms of satisfaction, motivation for the activity, terms of office, willingness to take part in further training, receipt of expense allowances, and limitations in the activity due to a lack of knowledge and skills. Qualified board members are generally more motivated for their activity and can look back on longer terms of office in almost all board positions. In addition, they feel less limited by their knowledge and skills than untrained board members and show a greater willingness to take part in further training. Trained board members are also more satisfied with their own performance, the motivation of the participants in club groups, and the opportunities for education and training than board members without training for the activity. Finally, trained board members receive a higher expense allowance for their activity than board members without training. Training for the position as board member is therefore important not only to obtain the necessary qualifications, but also to feel personally more confident in carrying out the activity.

High satisfaction and continuity among the board members

Overall, the board members of sports clubs in Germany are very satisfied with their work. On a scale from 0="not satisfied at all" to 10="extremely satisfied", they give an average score of 7.51, which means that approx. 88 % of the board members are generally sat-

ified with their activity. The board members are also very satisfied with their lives overall. Here the average score is as high as 7.98, which means that board members are more satisfied with their lives than the population as a whole (7.34).

The high level of satisfaction as a board member is also reflected in the high likelihood of recommending the activity and the club to others. Almost three quarters of the surveyed board members stated that they would (most) likely recommend their activity to others. However, 14 % were unlikely to recommend the activity. The consideration of terminating the activities as a board member is also not irrelevant: 41 % of board members say that they have often considered terminating their activities (even if they have not yet put this idea into practice). Such considerations are more frequent among older than younger board members and more frequent among men than women in board positions.

Despite the above-mentioned consideration of terminating their activities, there is nevertheless a high degree of continuity among the board members. They hold a board office for an average of 12 years. Just under one in 13 board members has been carrying out their activities for over 30 years (cf. Fig. 11). A position on the board of a sports club in Germany implies a long-term commitment to the office, accompanied by frequent problems regarding succession arrangements.

Problems of retaining and recruiting volunteer officers continue to represent the greatest and growing challenges for sports clubs (see also section 7). These could become more acute in the future as a result of current social developments such as changes in the world of work and the associated higher demands on the flexibility of employees. Trends are already apparent, as younger age groups, who are still fully immersed in working life, are underrepresented, especially in club management positions.

Board members are most frequently dissatisfied with tax benefits, financial compensation, and bureaucracy. Although the

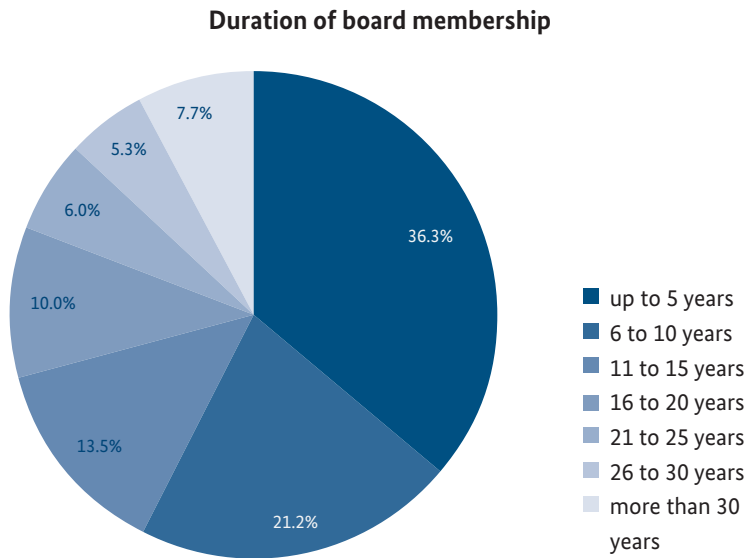


Fig. 11: Duration of board membership.

overall external requirements are increasing, these must be managed with the help of the associations and clubs in such a way that the burdens on the individual volunteer(s) are reduced as far as possible, creating incentives for individual commitment.

Board members are largely intrinsically motivated

The most important incentive for board members to take up a position on the board is the club community as well as their own well-being and the meaningfulness of the activity. It is also apparent that board members are driven by a desire to do something for the community and society in general. These motives are most pronounced among board members over the age of 60. Material incen-

tives such as the receipt of expense allowances or the provision of free sportswear, on the other hand, hardly play a role as a motivation across all age groups. In addition to age differences, it is also apparent that motive structures vary according to gender, board position, and training for the activity. It is therefore difficult to make general statements about the motivation of board members and clubs should be encouraged to consider the motives of their board members individually.

In the medium term, only about one third of board members are fully committed to future activities

When asked about their plans to be a member of the board in three years' time, around 37 % of board members fully agreed that this was their plan. It is evident here that the commitment to future activities is higher among trained board members. The highest level of agreement with the idea of still being active for the club in three years' time is among 27- to 60-year-olds, while the very young and very old board members are the least likely to agree. Among the board members up to the age of 18, this is probably related to upcoming professional training or studies at another location, as this age group also most frequently states that they plan to become a board member for another club within the next 12 months.

Difficulties with the succession of retiring board members

The over-60s are the most likely to plan to resign from their office as soon as a successor has been found. However, the age group 19- to 40-year-olds sees particular difficulties in finding the time to serve on the board in the short term. Consequently, succession arrangements often prove to be problematic.

Situation of coaches and trainers

Female coaches and trainers are more often qualified than their male colleagues

Compared to the board members, more coaches and trainers are qualified for their work. Around 60 % of the coaches and trainers are in possession of a currently valid licence of the German sports system. Women are more likely to have a licence than men, who are more likely to have a licence that is no longer valid than women. In addition, about 6 % state that they have completed a degree in sports

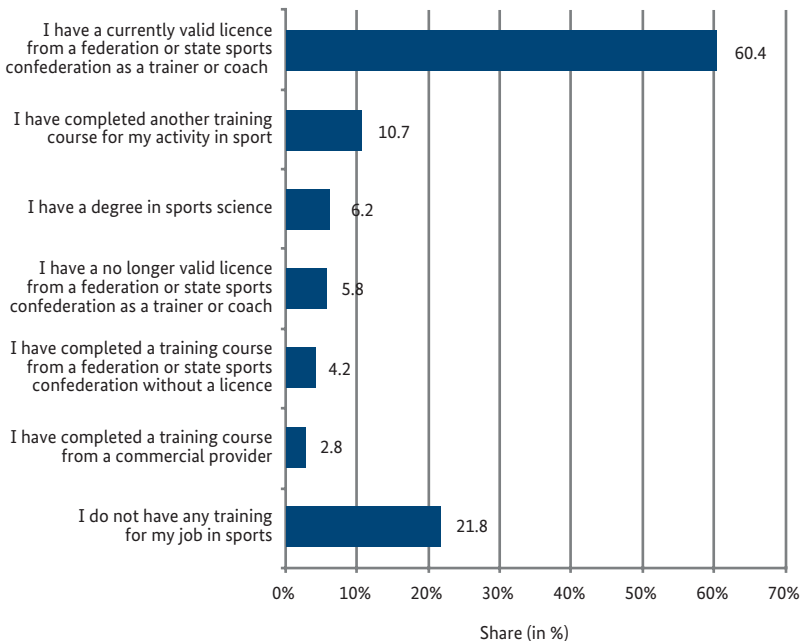


Fig. 12: Training of coaches and trainers.

science and just under 3 % have been trained by a commercial provider. Around 22 % have no training for their work as coaches and trainers (cf. Fig. 12). This applies proportionately to more men than women and more young people than older people.

Coaches and trainers with a licence are on average older (average age: 46.5) than persons without this training (average age: 40.7). This shows that the higher the age, the higher the proportion of qualified coaches and trainers and vice versa.

Average high satisfaction among coaches and trainers

With regard to satisfaction, the picture is similar for coaches and trainers as for board members – average satisfaction with the activity is very high and even higher for women than for men. The likelihood of recommending the club is also very high, but averagely not higher than for board members (cf. Fig. 13), and increases with the age of the coaches and trainers.

Training for the activity appears to be a decisive factor in achieving a generally higher level of satisfaction with the activity: On average, trained, i.e. qualified, coaches and trainers show a higher level of satisfaction with the activity, as do women and older people, who are more often in possession of a licence.

Coaches and trainers are especially satisfied with their own performance, the cooperation within the club, and the sporting success of the training group. Overall, coaches and trainers seem to be more satisfied with the situation and the support provided by the club than by the association. It can also be seen that coaches and trainers with training for their activity are more satisfied with the opportunities for further and advanced training, the professional support provided by the association, and the provision of appropriate teaching and learning materials. An improvement in the opportunities for education and training offered by clubs and associations might therefore possibly lead to a better rate of training and qualification.

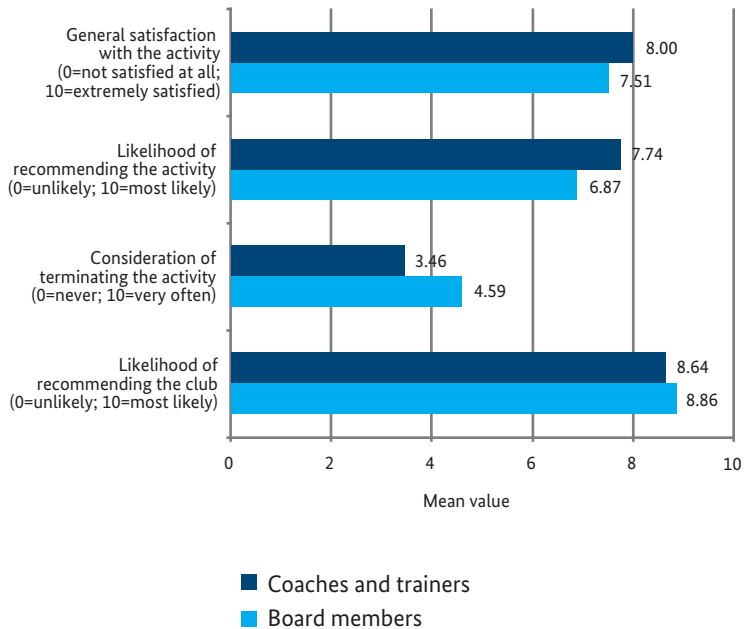


Fig. 13: Satisfaction of the coaches and trainers compared to the board members.

Fun as the greatest source of motivation for coaches and trainers

For coaches and trainers, fun is the most important incentive for their activity. More than 61 % of the coaches and trainers strongly agree with this motive (cf. Fig. 14). We see that women are more motivated by fun and feeling good than men. The opposite is true for the motive sporting success - men feel more motivated than women. Similar to the board members, coaches and trainers are strongly intrinsically motivated for their activity and cite social responsibility as well as altruism and values as other important motives.

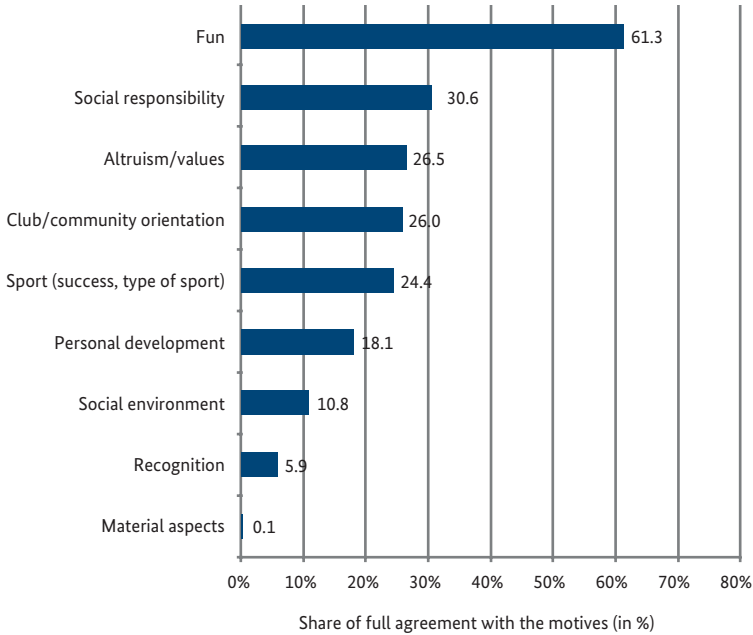


Fig. 14: Motives of coaches and trainers (share of full agreement with the motives in %).

Coaches and trainers committed to their activities

The majority of coaches and trainers plan to continue their activities in the future. There are hardly any differences between the genders regarding short-term plans. As with satisfaction, it is apparent that the willingness to take part in further training of (already) qualified coaches and trainers is much more pronounced than that of their colleagues without a qualification for their activity. It seems to be easier to persuade coaches and trainers who have already received training to take part in a further qualification than to introduce

people who have not yet received training to a first qualification. Nevertheless, initial training is also very important for clubs, as it is apparent that qualified coaches and trainers are more willing to carry out their work for a longer period of time.

Permanent contact persons increase the willingness of volunteers to take part in further training

The presentation of the situation of volunteer board members as well as coaches and trainers show that qualification for the work is a decisive factor in many respects. It is therefore crucial for the clubs to convince the volunteers of the need for further education and training. In this context, it is helpful to designate a person who is specifically in charge of further and advanced training matters and serves as a point of contact for interested volunteers. It has been shown that in clubs that have such a “caretaker”, the willingness of coaches and trainers as well as the board members to take part in further training is greater. On a positive note, about 41 % of the clubs already have such a permanent contact person in their club.

6 Infrastructure and finances



Clubs mainly use municipal sports facilities - with regional differences

Two thirds of the sports clubs use public (i.e. municipal) sports facilities. Around half of the clubs that use municipal sports facilities have to pay a fee to use them. In contrast, around 41 % of the clubs have club-owned facilities (including clubhouses). However, this share has decreased compared to 2015. There are also differences between the federal states (cf. Fig. 15).

Just over half of the sports clubs in Bavaria (50.9 %) and Baden-Württemberg (50.2 %) each have their own sports facilities, while the proportion of clubs with their own facilities is lowest in Berlin at 22.1 %. On the other hand, almost three quarters of Berlin's sports clubs use municipal facilities. This proportion is the highest in comparison to the clubs in the other federal states.

The financial situation of German sports clubs is largely stable

Almost three quarters of the clubs had a positive revenue-expenditure account in 2016, which means that the revenue exceeds the expenditure and the clubs maintain a stable financial situation. The size of the club does not play a decisive role here. However, the overall share of clubs with a positive revenue-expenditure account has decreased slightly compared to the survey period two years earlier.

Wide variance in revenue and expenditure of the clubs

If we consider the total annual revenue and expenditure of the clubs in the financial year 2016, there are clear differences associat-

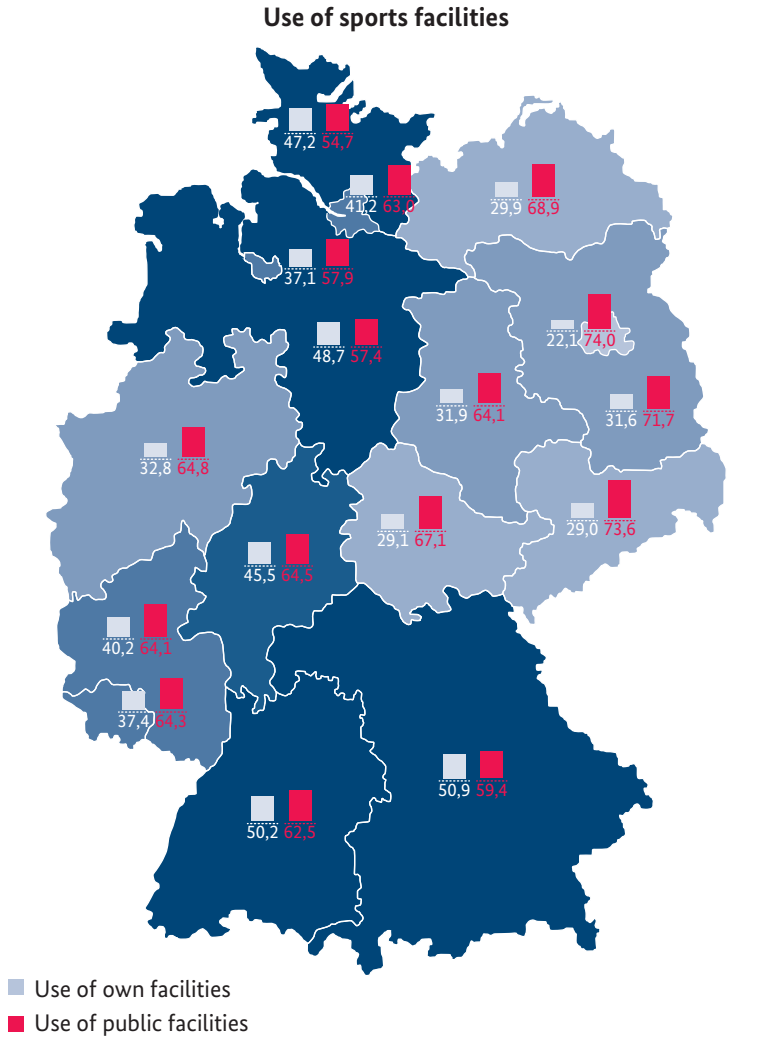


Fig. 15: Use of sports facilities by clubs (area colouring according to the use of the clubs' own facilities).

ed with the size of the clubs. On average, the total revenue amounts to around € 38,900 per club and the total expenditure to around € 35,000, where half of the clubs generate total revenue of around € 13,100 at most and have a total expenditure of € 11,500 at most. Both the average total revenue and the average total expenditure increase significantly with increasing club size (cf. Table 3).

Table 3: Annual revenue and expenditure of sports clubs in Germany in the financial year 2016.

	Total revenue (in €)		Total expenditure (in €)	
	Mean value	Median	Mean value	Median
Total	38,923	13,120	35,032	11,505
By club size (members)				
up to 100	10,143	5,000	9,288	4,300
101-300	33,632	21,387	31,131	18,515
301-1,000	91,717	61,369	80,064	52,359
1,001-2,500	221,865	180,325	200,513	150,904
over 2,500	906,280	580,478	832,561	501,620

The great heterogeneity in the level of financial resources, which is due not only to the size of the club but also to the range of sports on offer, becomes clear when looking at the distribution of revenue and expenditure. More than a quarter of the clubs generate annual revenues of up to € 5,000, while 8.4 % of the sports clubs have revenues of more than € 100,000 per year. A similar picture emerges for expenditure (see Fig. 16).

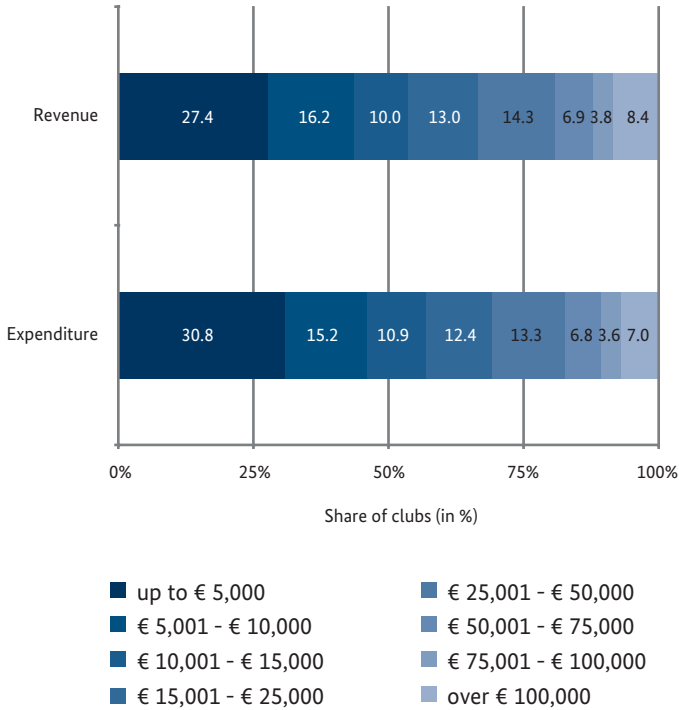


Fig. 16: Distribution of revenue and expenditure.

Sports clubs are an important economic factor

The economic importance of sports clubs is illustrated by extrapolating the average total annual revenue of the clubs. This results in total revenues for the approximately 90,000 clubs (reference year 2016) of around € 3.50 billion. Extrapolated, the total expenditure of the clubs in 2016 amounted to around € 3.15 billion.

Furthermore, the tax revenue induced by sports clubs should not be underestimated. Sports clubs not only receive support through public subsidies, but are also taxpayers themselves. The calculation of tax returns to the public authorities is complex and difficult, as a mass of special regulations for non-profit sports clubs must be taken into account. Nevertheless, the calculated values can be interpreted as trends. The calculations show that the tax returns of the sports clubs in Germany in 2016 totalled approximately € 644.8 million. This projection is based on average taxes per club of € 7,163 in 2016.

Club expenditure highest in their core sports operations

Clubs spend most of their money on their core sports operations, i.e. on coaches and trainers, on the maintenance and operation of their own facilities, and on sports equipment and clothing. The average expenditure of clubs for coaches, trainers, and sports instructors (based on all clubs, i.e. including clubs that had no expenditure in this area) was around € 7,700 in 2016. If the various expenses of the clubs¹² are bundled into overarching expenditure categories, expenditure for sports operations¹³ account for almost 41 % of the clubs' total expenditure. Personnel costs account for just over 21 % of total expenditure, making them the second largest item

12 See in detail Breuer, C. & Feiler, S. (2019). *Sports clubs in Germany: Organisations and internal stakeholders. Sport Development Report for Germany 2017/2018 - Part 1*. Bonn: Federal Institute of Sport Science.

13 Expenses for sports operations include: Sports equipment and sports clothing, maintenance and operation of own facilities, rent and reimbursement of costs for the use of facilities not belonging to the club, travel expenses for training and competition, implementation of own sports events, entry fees/registration fees, referees and officials expenses, game permissions/passes/licences.

Share of different expenditure categories in total expenditure

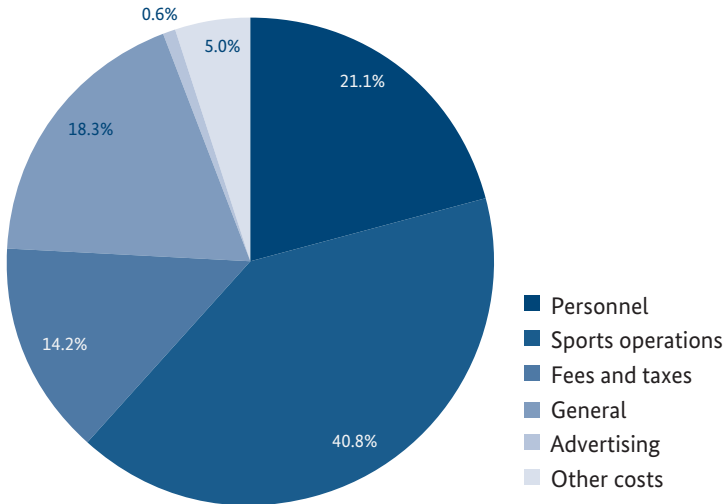


Fig. 17: Share of individual expenditure categories in the total expenditure of sports clubs.

of expenditure, followed by general costs (18.3 %)¹⁴, fees and taxes (14.2 %), and other costs (5 %)¹⁵. Expenditure on advertising or advertising measures only accounts for a very small share of 0.6 % of total expenditure (cf. Fig. 17).

Compared to the sixth wave of the Sport Development Report, personnel expenditure have increased, both for sports personnel such as trainers and coaches, and for administrative personnel. On the other hand, sports clubs in Germany have to spend less on

14 General costs include: General and administrative expenses, insurance, costs for non-sporting events, honours/gifts/anniversaries, tombolas, tax consultants, auditors, notary public, purchase of goods.

15 Other costs include interest payments (interest, repayments), provisions and other costs.

organising their own sporting events and on levies to state, district, or city federations.

Membership fees are the most important source of revenue for sports clubs

Sports clubs in Germany generate the majority of their revenue from membership fees. On average, the revenue from membership fees per club accounts for 55.4 % of the total revenue, i.e. more than half of the clubs' revenue comes from membership fees (cf. Fig. 18). This makes membership fees by far the most important and largest source of revenue for sports clubs.

Share of different revenue categories in total revenue

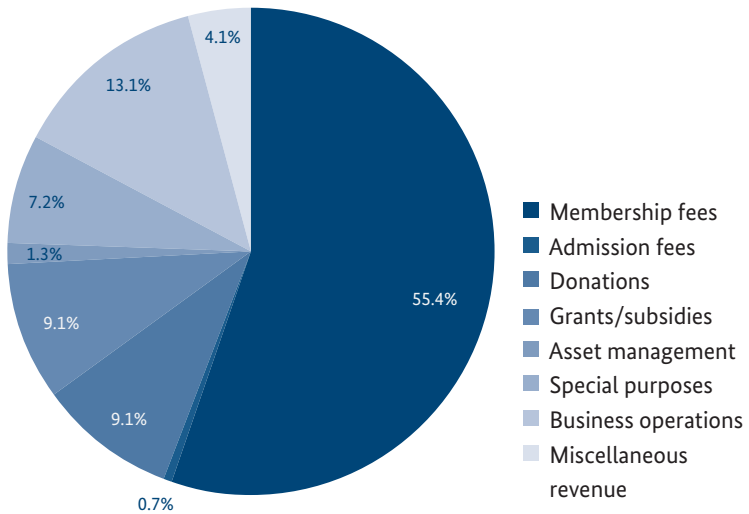


Fig. 18: Share of individual revenues in the total revenue of sports clubs.

If the many individual revenue categories¹⁶ are also bundled, oriented towards the four areas of activity of the sports clubs¹⁷, namely the non-material area, purpose-built operations, asset management, and economic business operations, it becomes clear that the revenue from the non-material area, which includes membership fees as well as admission fees (0.7 %), donations (9.1 %), and grants (9.1 %), makes up about three quarters of the revenue of the clubs.

In addition to the core revenue from the non-material area, the clubs also fall back on other sources of revenue to maintain a stable overall financial situation. Revenue from commercial business operations, e.g. from a self-operated restaurant, the sale of food and beverages or social events, accounts for about 13 % of total revenue.¹⁸ In addition, about 7 % of the revenue comes from the clubs' purpose-built operations, i.e. from revenue from sporting events, benefits for members against payment, course fees, and tombolas. About 4 % of the revenue comes from other sources (e.g. loans, reimbursements from health insurance funds and other revenues).

The core revenue from membership fees and donations has increased compared to the previous survey period (i.e. financial year 2014), as has revenue from perimeter advertising. In contrast, revenue from social events has fallen slightly. It is therefore apparent that the clubs are relying more and more on traditional sources of financing, but are also expanding other sources of revenue to secure their financial situation.

16 See in detail Breuer, C. & Feiler, S. (2019). *Sports clubs in Germany: Organisations and internal stakeholders. Sport Development Report for Germany 2017/2018 - Part 1*. Bonn: Federal Institute of Sport Science.

17 These areas are related to taxation of clubs and in this regard also to tax-exemptions.

18 In addition, the economic business operations include income from the collection of used materials, the sale of sportswear and sports or fan articles (merchandising), advertising contracts (jersey/equipment, perimeter, displays), a business operations company, and benefits for non-members and cooperation partners against payment.

Continued low membership fees

Despite an overall increase in revenue from membership fees, it is apparent that the membership fees per member for sports clubs in Germany are still low. For example, half of the clubs charge a monthly fee for children of up to € 3, for adolescents of max. € 4, and for adults of max. € 8 (cf. Table 4). Through these low fees, clubs offer a low-threshold sports programme that is affordable for a broad section of the population. Nevertheless, the system perspective, which produces representative results for members rather than for clubs, shows that on average members pay slightly higher fees than is evident from the club perspective. This means that larger clubs, in which more members are organised, tend to charge higher membership fees than very small clubs.

Table 4: Average membership fees in German sports clubs.

Monthly membership fee for	Median (in €)	Median (in €) System Perspective
Children	3.00	5.00
Adolescents	4.00	6.00
Adults	8.00	9.30

If we compare the membership fees over time with the results of the first wave of the Sport Development Report 2005/2006, it becomes clear that the fees have hardly increased in the last 15 years. In 2005, for example, half of the clubs had maximum membership fees of € 3 for children, max. € 3.60 for adolescents and up to € 6.50 for adults. Taking inflation into account, club members are currently paying less for their membership than they did 15 years ago. This is particularly interesting in view of the fact that a sur-

vey of the West German Football and Track and Field Association (WFLV) on appropriate membership fees in football and track and field clubs showed that an increase in membership fees of up to 40 % would make economic sense¹⁹. This means that there is considerable potential for sports clubs in Germany to improve their revenue situation through membership fees. This could, for example, make it possible to invest more in the education and training of their board members and coaches and trainers, putting them in a position to be able to offer their members a higher quality sports programme. However, the interests of members must always be kept in mind when making such an increase, as the core objective of the clubs is not to maximise revenue but to represent the interests of the members. However, further studies show that members are willing to pay higher fees, especially if the club gets into financial difficulties²⁰. In such financially difficult situations, the clubs may well resort to an increase in membership fees²¹.

19 See Breuer, C., Wicker, P. & Swierzy, P. (2016). *Angemessene Mitgliedschaftsbeiträge in den Fußball- und Leichtathletikvereinen des WFLV*. Köln: Deutsche Sporthochschule Köln.

20 See Swierzy, P., Wicker, P. & Breuer, C. (2018). Willingness-to-pay for memberships in non-profit sports clubs: The role of organizational capacity. *International Journal of Sport Finance*, 13(3), 261-278.

21 See Feiler, S., Wicker, P. & Breuer, C. (2019). Nonprofit Pricing: Determinants of Membership Fee Levels in Nonprofit Sports Clubs in Germany. *International Journal of Sport Finance*, 14(4), 262-277.

7 Challenges and support benefits



Personnel problems as a central challenge for sports clubs in Germany

Sports clubs in Germany continue to face challenges with personnel problems. This is particularly evident in the retention and recruitment of volunteer functionaries, which on average is seen as the most serious problem and has increased compared to the sixth wave of the Sport Development Report. The same applies to the retention and recruitment of coaches and trainers as well as member retention and recruitment.

Clubs increasingly find themselves limited by bureaucratic hurdles such as the number of laws and regulations, while at the same time lacking support from politics and administration. It can therefore be stated that the complexity of the demands on the clubs or club boards is increasing while at the same time the search for club personnel is becoming more difficult. On the other hand, financial problems and difficulties concerning sports facilities tend to be less severe.

37.8 % of sports clubs in Germany see their existence threatened by at least one problem - very small clubs most affected

In addition to general challenges, there are also difficulties which threaten the existence of clubs and are therefore to be regarded as particularly critical. Just under 38 % of the clubs state that they feel threatened in their existence by at least one of the given problems. This means that the proportion of clubs with at least one existential problem has more than doubled since the first wave of the Sport Development Report (SDR 2005/2006: 15.1 %).

The survey (7th wave) shows that the retention and recruitment of volunteer functionaries in particular is an existential problem for sports clubs. Moreover, significantly more clubs see their existence threatened by member retention and recruitment than during the sixth wave of the Sport Development Report.

However, it is also apparent that the perceived threat to the existence of sports clubs varies depending on the size of the club. For example, significantly more very small clubs with up to 100 members feel their existence is threatened by at least one problem than is the case for all larger clubs. The proportion of clubs that feel such a threat to their existence tends to fall as the size of the club increases. Just over a third of the clubs with 301 to 1,000 members state that they feel that their existence is threatened by at least one problem, while this applies to 27.5 % of the large sports clubs with more than 2,500 members (cf. Table 5).

Table 5: Clubs with existential problems.

Club size (number of members)	Clubs with at least one existential problem (Share of clubs in %)
up to 100	41.2
101-300	36.3
301-1,000	34.8
1,001-2,500	27.9
over 2,500	27.5

Support benefits of the clubs somewhat more developed for coaches and trainers than for board members

In order to counteract the personnel problems, sports clubs in Germany rely on various support measures for their volunteers. The clubs give priority to financial compensation, such as the payment of expense allowances and travel allowances. Direct payments in the form of expense allowances and travel allowances are used more for coaches and trainers.

In addition, the clubs offer to assume the volunteers' costs for further and advanced training to enable them to carry out their tasks. In this way, the clubs also ensure that they are able to offer high quality sports programmes. However, cost assumption by the clubs is also offered to coaches and trainers somewhat more than to board members.

Overall, it is also apparent that clubs place more value on support benefits for coaches and trainers than on support benefits for board members. These are mainly promoted by supporting new ideas, which seems to make sense since board members are responsible for the strategic work of the club and are therefore dependent on the implementation of new ideas.

8 Conclusion



The Sport Development Report is published in its seventh wave and provides important information on the development of sports clubs in Germany over the last 15 years. Contrary to the fears of major club extinction, the results of the first seven waves show that the club landscape in Germany is alive and well and that sports clubs play an important role in society. Around 90,000 sports clubs with around 27 million memberships and around 8 million honorary and volunteer workers at all levels of the clubs are numbers that underline the great importance of sports clubs in Germany.

Nevertheless, sports clubs in Germany are confronted with social developments that pose challenges, especially in the field of volunteer work. This is where the clubs and associations need to take action in order to offer support benefits that suit the volunteers and provide them with targeted support for their work. The additional stakeholder surveys of the Sport Development Report provide important insights in this respect. Above all, we see the positive benefits of qualifications on satisfaction, motivation, and the future plans of volunteers. Clubs and associations should therefore strive to increase the rate of training among volunteers. In this context, it is helpful to name a caretaker in the club who is responsible for further and advanced training programmes and who is available as a contact person for the volunteers. A review of existing formats appears to be particularly useful for the boards.

The increased bureaucratic requirements that are placed on the clubs must also be viewed critically. The clubs feel increasingly burdened by the number of laws and regulations. This is consistent with the fact that the clubs seem to lack support from politics. This is particularly problematic considering that clubs are primarily organised on a voluntary basis and that increased complexity, which is also associated with increased time commitments from the volunteers, is difficult for the volunteers to cope with. On the other hand, it is very hard to envisage their replacement by paid work. Only a small proportion of clubs have a paid management position. In this

context, the structure of the sports club landscape must also be taken into account, which consists primarily of very small clubs which, due to limited resources, are very unlikely to be able to switch to paid staff. The clubs may be able to bundle resources by collaborating, for example, with schools, day-care centres or other clubs.

However, representatives of organised sport and sports policy are also called upon to be more cognisant of the structures of sports clubs and to take this into account to a greater extent when designing the bureaucratic requirements. On the other hand, the clubs themselves are called upon to enquire with the associations and public institutions about possible support measures and to make use of existing offers. This appears particularly necessary in the context of increased and necessary requirements, e.g. in the area of child protection or financial management.

Ultimately, there is no alternative to making volunteer positions more attractive and supporting volunteer functionaries in the clubs and associations, because although the overall requirements are increasing, these must be managed with the help of the associations and clubs in such a way that the burdens on the individual volunteer(s) are reduced as far as possible, creating incentives for individual commitment. In addition to measures taken by the clubs themselves, such as recognition campaigns, this also includes necessary assistance from the associations in factual questions of all kinds, as well as support through low-threshold counselling and training programmes. Moreover, political successes in terms of reducing bureaucratic costs and tax relief would also be a step in the right direction.

In addition, the retention, recruitment, and qualification of coaches and trainers should be made a central theme of support work in the sports federations and confederations. In this context it seems worth considering to what extent a moderate increase in the membership fees of the clubs could be used to initiate a quality or qualification offensive in the clubs.

To analyse structures and identify challenges and potential for action, systematic monitoring of the sports club landscape by means of the Sport Development Report is useful, as there will be further challenges for the clubs in the future. In this respect, the clubs should continuously review their programmes and make adjustments if necessary, e.g. in order to be able to address the growing group of senior citizens with an increased and target group-specific programme.

The data obtained here provide important information for clubs, associations and representatives of sports policy, which will facilitate an evidence-based approach to the future development of sports clubs in Germany and thus effectively address critical problem areas.

9 Method and sampling



Club survey

The sports clubs in Germany were surveyed online in the period from mid-October to mid-December 2017 for the seventh wave. For this purpose, the clubs were invited by email to take part in the survey using an individual link. The email addresses were provided by the state sports confederations. A total of 80,421 clubs were invited by email to take part in the survey, as email addresses were not available for all the sports clubs in Germany. This sample was again reduced by around 3,000 clubs that either could not be reached by email or actively refused to participate in the survey. In order to increase the club participation rate, two reminder emails were sent out, each of which led to an increase in the response rate. A total of 19,889 sports clubs took part in the survey of the seventh wave, which corresponds to a response rate of 25.7 % (cf. Table 6).

Table 6: Overview of the participation rates for the club survey.

Sport Development Report 2017/2018	N	Proportion of Sample I (in %)	Proportion of Sample II (in %)
Population	89,594		
Sample I	80,421	100.0	
Incorrect email addresses, person no longer active in the club, club no longer exists/ disbanding, refusals	3,073		
Adjusted sample II	77,348		100.0
Interviews taken place	19,889		
Participation (in %)	22.2	24.7	25.7

The data generated from the survey was subjected to a thorough plausibility check. As the sports club landscape in Germany is broadly diversified, the data was evaluated on the basis of a weighting. For this purpose, the clubs were divided into size categories based on membership (up to 100 members; 101 to 300 members; 301 to 1,000 members; 1,001 to 2,500 members and over 2,500 members) and weighted relative to their proportion of the population. In this procedure, a distinction was made between state sports confederations, as the distribution of club sizes varies from region to region. A weighting factor was then determined for each individual case on the basis of the distribution of size classes in the population of the respective federal state and the sample, with which the sample was then weighted for the final evaluation.

To ensure that the data of the individual waves of the Sport Development Report was comparable and to construct a longitudinal data set, all clubs were assigned an unchangeable club number. This club number can be used to identify clubs that have participated in individual waves of the survey and to show the development of the clubs over time. A total of $n=8,652$ clubs nationwide participated in the 2015 and 2017 surveys (wave 6 and wave 7), which corresponds to a continued participation rate of 42.1 %.

Individual stakeholder surveys

For the first time in the history of the Sport Development Report, in addition to the sports clubs themselves, various groups of people from the clubs were surveyed. In the seventh wave, coaches and trainers as well as board members were surveyed in addition to the

clubs. In order to contact these two groups of people, the clubs were asked at the end of the club survey whether they would be willing to participate in the survey of their coaches and trainers as well as the board members. If approval was granted, the clubs were asked to provide a contact email address at which the clubs could be contacted during the two individual surveys.

The sports clubs that had agreed to take part in the individual surveys were contacted by the project team before the start of each survey. In the initial contact, the planned implementation of the individual surveys was explained and support was offered with regard to the text for inviting the coaches and trainers or board members. The clubs were asked to forward an individual link for their club to their coaches and trainers or board members. Via this specific club link, it was then possible to assign the persons to the various clubs.

Of the 19,889 clubs that took part in the club survey, 4,201 clubs agreed to participate in the survey of coaches and trainers. These clubs received the individual club link on 07.03.2018 to forward and invite their coaches and trainers to take part in the survey. Again, two reminder emails were sent out, which led to an increased participation in the survey. The survey was completed on 02.05.2018. A total of 6,752 coaches and trainers from 2,352 clubs participated in the survey (cf. Table 7).

A total of 5,129 clubs agreed to participate in the survey of the board members. These clubs received the individual club link on 08.05.2018 to forward and invite their board members to take part in the survey. Again, two reminder emails were sent out, which led to an increased participation in the survey. The survey was completed on 09.07.2018. A total of 4,631 board members from 2,678 clubs participated in the survey (cf. Table 8).

Table 7: Overview of the sample of coaches and trainers.

Federal state	Clubs Sample	Clubs Participation	Coaches and trainers
	Number		
Bavaria	497	255	776
Hamburg	44	29	205
Berlin	65	38	130
Brandenburg	124	72	135
Bremen	19	11	43
Hesse	330	161	379
Mecklenburg-Vorpommern	80	43	70
Lower Saxony	451	264	831
North Rhine-Westphalia	958	551	1,464
Rhineland-Palatinate	306	173	531
Saxony	201	116	417
Saxony-Anhalt	129	74	140
Thuringia	156	88	203
Baden-Wuerttemberg	594	337	1,025
Saarland	104	61	136
Schleswig-Holstein	143	79	267
Total	4,201	2,352	6,752

Table 8: Overview of the sample of board members.

Federal state	Clubs Sample	Clubs Participation	Board members
	Anzahl		
Bavaria	634	296	455
Hamburg	57	35	78
Berlin	97	57	98
Brandenburg	137	61	97
Bremen	23	14	21
Hesse	424	219	427
Mecklenburg-Vorpommern	89	45	60
Lower Saxony	533	288	493
North Rhine-Westphalia	1,160	663	1,185
Rhineland-Palatinate	372	202	385
Saxony	225	116	169
Saxony-Anhalt	145	63	93
Thuringia	176	83	115
Baden-Wuerttemberg	736	374	668
Saarland	129	76	132
Schleswig-Holstein	192	86	155
Total	5,129	2,678	4,631

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