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Analysis of the situation of sports clubs in Germany

Sports clubs in Germany

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For reasons of readability the depiction of the female form was dropped. However, the use of the male form always indicates the consideration of the female gender.

1 Summary

The sports development reports' objective is to provide political and managerial information for policy-makers of organised sports. In the year of 2007, a total of n=13,068 sports clubs participated in the nationwide online survey.

The sports clubs in Germany contribute significantly to public welfare. Without them an adequate supply of sports would be hard to imagine. Thus, 56,500 sports clubs have sports offers for infants and preschool children. 84,000 sports clubs have sports offers for children and adolescents and over 84,000 sports clubs have sports offers for seniors over 60 years. Additionally, 30 % of the sports clubs in Germany offer programmes with explicit purposes of health promotion, prevention, and rehabilitation and consequently contribute significantly to the health care of the population. Moreover, by owning 11,800 gymnasiums and sports halls as well as 23,500 sports fields, the sports clubs relieve public authorities to a significantly increasing extent concerning the availability of sports facilities. However, in the year of 2006 German sports clubs had to pay usage fees for public sports facilities more frequently compared to 2004. Only 29.1 % of the sports clubs use public sports facilities without charge or any other sort of compensation such as key authority, maintenance etc. Although problems in the area of acquirement and adherence of voluntary workers seem to increase, organised sports still present the most important part of civic involvement. Altogether, the sports clubs of Germany hold about 2.1 m of voluntary workers. The average working hours of the voluntary workers increased significantly over the last two years. The impact of the sports clubs on the German labour market has increased. Especially in the areas of direction and administration of sports clubs the number of jobs has increased by 12 % over the last two years. In addition, sports clubs in Germany train significantly more people compared to the situation two years earlier.

Furthermore, sports clubs have contributed significantly to the representation of Germany in foreign countries. Around 21,000 sports clubs have regular international contacts.

Regarding financing, the average expenses for trainers and sports teachers as well as assurances both have increased by 14 %. This situation is deteriorated by the fact that in the meantime these increased expenses could not be compensated by any other decrease of costs. From a sports clubs' perspective the support provided by the sports confederations should be optimised in the areas of general financial aid for sports clubs, support of voluntary work, information and consultation in the area of

member acquisition and adherence as well as in the area of talent scouting and support.

2 Importance of sports clubs in Germany

2.1 Sports supply for the population

The contribution of sports clubs to the sports supply of the population is irreplaceable in Germany. Especially for those population groups, which seem to gain special relevance against the background of demographic change: Infants, children, adolescents, and seniors. Thus, 56,500 sports clubs have sports offers for infants and pre-school children. 84,000 sports clubs have sports offers for children and adolescents and over 84,000 sports clubs have offers for seniors over 60 years (see table 1).

Table 1: Sports offers according to target groups.

	Proportion of sports clubs (in %)	Total
Offers for children under 6 years	62.5	56,500
Offers for children/adolescents (0 to 18 years)	92.8	84,000
Offers for seniors (over 60 years)	93.0	84,100

In this case, it is especially important that sports clubs guarantee organised sports offers, which are affordable for the mass-population. Consequently, 50 % of all sports clubs charge a monthly maximum membership fee of € 3.50, for adolescents a maximum of € 4.50, for adults a maximum of € 7.50, and for families a maximum of € 14,- (see table 2).

Table 2: Monthly membership fees and their development.

Monthly membership fees for	Median ¹ (in €)	Index ² Median (2005=100)	Mean (in €)
Children	3.50	116.7***	9.22
Adolescents	4.50	111.1***	11.59
Adults	7.50	115.4***	22.32
Families	14.00	116.7***	40.13
Passive members	4.00	114.3***	12.03

¹ The median is described as the number separating the higher half of the distribution from the lower half. For the calculation of the median all values are arranged according to size. If the number of values is odd, the median is the value in the middle of the numerical series. If the number of values is even, the median is the average of the two middle values. Thus, the median of the numerical series 1, 1, 2, 3, 3 and 1, 1, 2, 4, 42 is 2 in both cases, because 2 is the middle value. In contrast, the calculation of the mean value ("average"): In the first numerical series the mean value is 2 again, whereas it is 10 in the second numerical series. Since there are many sports clubs with small fees and little sports clubs with high fees, the distribution of the values tend to be in accordance to the second example, and the mean average is clearly higher than the median.

² The calculation of the indexes is explained in chapter 4.3 on page 23.

At the same time the development of the indexes reveals, that sports clubs were forced to increase their membership fees over the last two years (see table 2).

More than half of the sports clubs do not even charge an admission fee. Over 60 % of the sports club do not charge admission fees for children, adolescents, and families. If there are admission fees, 50 % of these sports clubs charge a maximum of € 10,- for children, a maximum of € 16.50 for adults, and a maximum of € 25,-for families (see table 3). The longitudinal analyses show no increase of the average admission fee.

Table 3: Admission fees.

Admission fees for	Proportion of sports clubs, which do not charge admission fees (in %)	Median (in €)	Mean (in €)
Children	63.7	10.00	16.54
Adolescents	60.4	10.00	21.75
Adults	52.3	16.50	66.68
Families	62.3	25.00	93.67
Passive members	70.7	10.00	31.45

In addition, the sports supply of the population benefits from approximately 100,000 courses which are offered to non-members. However, the number of courses as well as the number of sports clubs providing courses is slightly decreasing (see table 4).

Table 4: Courses for non-members and their development.

	G	Index Number of courses (2005=100)	Index Availability of courses (2005=100)
Proportion of courses of all sports offers (in %)	33.7	86.0**	91.8**
Number of courses for non-members (Total)	99,500		

With the absence of sports clubs competitive sports would hardly be possible. 13.7 % of the sports clubs are involved in competitive sports and have top-level athletes. Overall there are 12,400 sports clubs which are engaged in competitive sports (see table 5).

Table 5: Proportion and number of sports clubs with top-level athletes.

	G
Proportion of sports clubs (in %)	13.7
Number of sports clubs (Total)	12,400

2.2 Supply of sports facilities

Furthermore sports clubs contribute to public welfare by providing a considerable part of the sports facility infrastructure in Germany and thus relieve public households. Nationwide, 42.3 % of the sports clubs or 38,300 sports clubs respectively, own sports facilities (incl. club houses; see table 6). In this case, there has not been any considerable change compared to last time's results.

Table 6: Sports clubs which own sports facilities.

	G
Proportion of sports clubs, which own sports facilities (in %)	42.3
Number of sports clubs (Total)	38,300

A differentiated look makes the sports clubs' contribution to the sports infrastructure a lot clearer. Thus, sports clubs provide 11,800 gymnasiums and sports halls, 23,500 sports fields for football and hockey, 3,200 sports fields for athletics, 6,200 bowling alleys, 4,700 fitness centres and weight rooms, 22,000 shooting ranges, 5,800 horse riding facilities, and 700 swimming pools. Additionally, there are 31,800 club houses and 5,800 youth centres, which are remarkably important concerning the social functions of sports. Particularly in terms of gymnasiums, sports halls, and sports fields there has been an increase of sports clubs' contribution to the German sports infrastructure in central sectors. Thus, sports clubs provide significantly more gymnasiums, sports halls, and sports fields than two years ago. Regarding the gymnasiums, sports halls, and sports fields, there has been a significant increase. However, there has been a significant decrease of sports clubs which own club houses (see table 7). The contribution of sports clubs to the sport infrastructure becomes clear too, if you take into consideration that 17.3 % of the clubs financed building measures over € 10,000,-.

Table 7: Owning sports facilities and its development (n.a. = not available 2005/06).

	Number of sports clubs, which own facilities	Index Owning facilities (2005=100)	Number of sports facilities owned by sports clubs	Index Number of facilities (2005=100)
Gymnasiums and sports halls	8,600	115.6*	11,800	134.4**
Sports fields for football and hockey	13,100		23,500	112.7*
Sports fields for athletics	2,900		3,200	
Bowling alleys	2,800		6,200	
Tennis courts	9,900		49,500	

	Number of sports clubs, which own facilities	Index Owning facilities (2005=100)	Number of sports facilities owned by sports clubs	Index Number of facilities (2005=100)
Fitness-centres	4,300		4,700	
Club house	29,500	92.6*	31,800	92.8*
Youth centre	11,100	n.a.	11,500	n.a.
Shooting facilities	4,300		22,200	
Volleyball fields	1,600		2,300	
Water sports facilities	2,800		5,600	
Horse riding facilities	2,200		5,800	
Swimming pools	600		700	
Air sports fields	800		1,300	
Golf grounds	300		400	
Petanque areas	700		1,500	
Sports rooms (Aerobic, dance)	1,100		1,500	
Winter sports facilities	900		2,100	
Fishing areas	100	n.a.	600	n.a.
Other facilities	2,900		6,400	

2.3 Health care

30 % of the sports clubs in Germany offer programmes with the explicit objective of health promotion, prevention, and rehabilitation and therefore contribute significantly to the health care of the population. Overall 14 % of the sports clubs are related to health care (see table 8).

Table 8: Sports offers in the health care section.

	Proportion of sports offers (in %)	Proportion of sports clubs (in %)
Health promotion and primal prevention	12.0	28.4
Rehabilitation/tertiary prevention	1.4	4.6
Disabilities/chronic diseases	0.6	2.2
Sum of categories related explicitly to health care	14.0	30.2

2.4 Co-operations

The numerous co-operations with other institutions also indicate the high public welfare character of sports clubs. Thus, more than two thirds of the sports clubs coop-

erate with schools in some kind of form, 47 % with kindergartens/day care centres and 36 % with the youth offices. Over the last two years, German sports clubs started significantly more co-operations. Especially co-operations with kindergartens/day care centres, commercial enterprises, health insurances, youth offices, commercial sports facilities, and health offices are increasing (see table 9).

Table 9: Cooperating sports clubs and their development (multiple designations possible).

Co-operation with	Proportion of cooperating sports clubs (in %)	Total	Index (2005=100)
Other sports clubs	79.4	71,800	107.8***
Schools	69.9	63,200	109.4***
Kindergartens/day care	46.7	42,200	146.1***
Commercial enterprises	44.8	40,500	157.4***
Health insurance	41.7	37,700	163.5***
Youth offices	36.3	32,800	134.9***
Commercial sports facilities	36.2	32,700	158.3***
Health offices	28.9	26,100	205.7***

Here, 21 % of the sports clubs in Germany generate offers in collaboration with schools, 8 % with kindergartens and day care programmes, and 3 % with the youth office. Over the last two years, the number of sports clubs which collaborated with health insurance funds and kindergartens in order to generate offers increased significantly (see table 10).

Table 10: Cooperating sports clubs while generating offers (multiple designations possible).

Co-operation with	Collaboration while generating offer (Proportion of sports clubs in %)	Total	Index (2005=100)
Other sports clubs	13.7	12,400	
School	20.8	18,800	
Kindergarten/day care	8.2	7,400	125.9*
Commercial enterprise	6.0	5,400	
Health insurance	7.8	7,100	143.7**
Youth office	3.2	2,900	
Commercial sports facilities	2.9	2,600	
Health offices	0.4	400	

2.5 Convivial gatherings

Additional to the actual sports offers, convivial gatherings and offers intensify the public welfare character of sports clubs. The fact that members really attend these gatherings and therefore have an effect on the public welfare potential is demon-

strated by the following facts: on average almost every second member participates in convivial gatherings. Overall 13.0 m people attended convivial gatherings of their sports clubs in the year 2006. However, this trend is slightly declining (see table 11).

Table 11: Sports clubs' members, who attended convivial gatherings in 2006, and their development.

	G	Index (2005=100)
Proportion of members (Mean in %)	47.4	94.9***
Number of members (Total)	13,000,000	

2.6 Civic involvement

Another central and offer exceeding feature of the public welfare character is presented by the civic involvement. Altogether the members of German sports clubs fill 2.1 m voluntary positions. Thereof 1.0 m work on the board level and 1.1 m on the executive level (e.g. trainers, judges, and referees). There are 1.4 m male and 670,000 female voluntary workers. Although these numbers are declining (see table 12), organised sports represents the most important part of civic involvement in Germany. Especially if you consider the fact that despite the development of the number of voluntary workers, the average working hours per voluntary worker have experienced a significant increase.

Table 12: Voluntary positions per sports club as well as average working hours per voluntary worker and their development.

Number of voluntary workers	Mean	Total	Index (2005=100)
...on the board level	10.7	968,000	85.0***
...on the execution level	12.3	1,113,000	72.5***
...male	15.6	1,411,000	79.5***
...female	7.4	670,000	80.7***
Overall	23.0	2,081,000	79.9***
Average working hours per voluntary worker (hrs./month)	17.6	36,600,000	113.2*

Voluntary workers work 17.6 hours a month on the average. Nationwide this adds up to 36.6 m working hours, which are served in the sports clubs every month in order to attain public welfare purposes. This results in a nationwide monthly added value of € 550 m and respectively a yearly added value of € 6.6 bn. Also important is that in this calculation the performance of voluntary workers of special employments of labour (festivals, sporting events, renovations, cleaning etc.) is not considered. Yet, 6.6 m members participate in special employments of labour.

2.7 Integration of immigrants

Against the background of the population's internationalisation the performance of sports clubs concerning the integration of migrants becomes much more important for the evaluation of their public welfare character. Over 10 % of the members of German sports clubs have a migration background. This amounts to 2.8 m people with a migration background, which are integrated in about 90,000 sports clubs (see table 13). In 13.5 % of the sports clubs migrants even do voluntary jobs (see table 14). Overall 2.6 % of the voluntary workers have a migration background (see table 13). 8.4 % of the sports clubs in Germany have taken actions and initiatives to integrate migrants such as the installation of specific offers, targeted consultation, and anti-racism campaigns (see table 15).

Table 13: Members and voluntary workers with migration background.

	G
Proportion of members (Mean in %)	10.1
Number of members (Total)	2,760,000
Proportion of voluntary workers (Mean in %)	2.6

Table 14: Voluntary workers with migration background according to positions.

Voluntary workers	Proportion of sports clubs (in %)	Total	Number of migrants (Mean)	Total
...on the board level	7.4	6,700	0.2	16,900
...on the execution level	9.9	9,000	0.4	38,100
Total	13.5	12,200	0.6	55,000

Table 15: Initiatives to integrate migrants in sports clubs (MB=migration background; Assessment in school grades from 1=very good to 6=unsatisfactory; multiple designations possible).

Initiatives of integration	Proportion of sports clubs, which took initiatives (in %)	Proportion of all sports clubs (in %)	Grading of the initiative (Mean)
Special actions	59.7	5.0	2.26
Special training offers	30.2	2.5	2.22
Support	29.7	2.5	2.04
Forming/employing workers with migration background	12.3	1.0	1.82
Targeted consultation	9.1	0.8	2.35
Co-operations with other public institutions	7.1	0.6	1.75
Installation of social contacts	3.9	0.3	2.39

Initiatives of integration	Proportion of sports clubs, which took initiatives (in %)	Proportion of all sports clubs (in %)	Grading of the initiative (Mean)
Campaigns (Anti-racism, Violence prevention)	3.7	0.3	1.97
Club is for or by people with migration background	1.5	0.1	1.56
Other	17.9	1.5	2.11

2.8 Supporting democracy

Sports clubs are often called schools of democracy, especially for adolescents. Thus, the more extensive the possibilities to participate are for adolescents, the higher is the corresponding public welfare character. Overall, these possibilities to participate are relatively high for adolescents. Out of the 91.4 % of the sports clubs, in which adolescents are organised, 49 % hold the office of a youth representative or a youth referent in a chair of the entire board. In 37 % of the sport clubs the youth representation is elected by the youth itself. In 35 % of the sport clubs adolescents have the right to vote in the general assembly. 29 % of the clubs have an adolescent youth-speaker and in 21 % of the clubs there is a juvenile executive board (see table 16).

Table 16: Possibilities to participate and their development (multiple designations possible).

Possibilities to participate	Proportion of sports clubs (in %)	Total	Index (2005=100)
Youth representative, youth referent in a chair of the entire board	49.1	40,600	
Election of the youth representations by adolescents	37.0	30,600	
Election of an adolescent as youth-speaker	28.6	23,600	
Adolescents' right to vote in the general assembly	35.3	29,200	
Juvenile executive board	20.9	17,300	88.8*
Election of the youth representation on the department level by adolescents	13.3	11,000	
None of these offices	24.0	19,800	

2.9 Employments

32.4 % of the sports clubs employ staff members for a fee and 4.4 % of the sports clubs employ paid executives. In the longitudinal analysis, the proportion of sports clubs which employ paid staff members has decreased (see table 17). This can be traced back to a decrease of paid staff members in the areas of sports, training, supervision etc. (see table 18). Meanwhile, the proportion of sports clubs, which have employees in the areas of direction and administration, has increased.

Almost 20 % of the executives earn more than € 3,000,- (pre-tax) per month. About one third earns between € 1,000,- and € 3,000,- and half of it earns only up to € 1,000,-. Altogether, the existing employments in sports clubs equal 40,000 full-time jobs.

Table 17: Paid staff members and respectively executives and their development.

	Proportion of sports clubs (in %)	Total	Index (2005=100)
Paid staff members (incl. paid executives)	32.4	29,000	92.3*
Paid executives	4.4	4,000	157.2***

Table 18: Paid work according to field of activity.

Field of activity	Proportion of sports clubs (in %)	Index (2005=100)	Number of staff members (Mean)	Total
Direction and administration	13.0	111.9*	0.9	84,100
Sports, training, supervision etc.	25.9	92.2*	8.9	808,800
Technology, maintenance etc.	16.9		1.0	94,100
Total	32.4	92.3*	10.9	987,000

The importance of sports clubs concerning the job market is also made obvious by the significantly increasing number of training positions, positions for voluntary gap years, and specific job types for unemployed people (so called "Hartz IV"-jobs) over the last two years (see table 19).

Table 19: Other employments (proportion of sports clubs in % which employ paid staff members or plan to do this) and their development.

	Existent	Total	Index Existent (2005=100)	Planned
Trainees	2.4	2,200	225.0*	0.6
Social services	1.1	1,000		0.9
Voluntary gap year	3.3	3,000	149.9*	3.0
Additional jobs (Hartz IV)	8.0	7,200	218.1***	3.6

2.10 Representation of Germany in foreign countries

Furthermore, the sports clubs have made an important contribution to Germany's representation in foreign countries. Around 21,000 sports clubs are in regular contact with other international sports clubs (see table 20). Out of these 21,000 sports clubs, 13,800 participate in international competitions, 11,600 regularly invite foreign teams and respectively athletes to their own competitions, 6,300 engage in youth-encounters with adolescents of foreign countries and 5,000 participate in collective training camps with teams of foreign countries (see table 21).

Table 20: Sports clubs with international contacts.

	G
Proportion of sports clubs (in %)	21.3
Number of sports clubs (Total)	20,900

Table 21: Type of international contact (multiple designations possible).

	Proportion of sports clubs with interna- tional contacts (in %)	Proportion of all sports clubs (in %)	Total
Participation in tournaments and competitions in foreign countries	71.2	15.2	13,800
Invitations of foreign teams/athletes to tournaments and competitions	60.3	12.8	11,600
Youth-encounters with adoles- cents of foreign countries	32.7	7.0	6,300
collective training camps with teams/athletes of foreign coun- tries	25.7	5.5	5,000
Other contacts	16.4	3.5	3,200

3 Problems of sports clubs and support

3.1 General problems

While sports clubs' services are quite remarkable, the situation of sports clubs seems to be problematic at times. In the first instance problems can be for example: the adherence or acquisition of (1) voluntary workers, (2) adolescent competitive athletes, and (3) trainers. There is a need for support concerning (4) the adherence or acquisition of members as well as (5) the number of laws, orders, and directives for the sports clubs, which is often classified as to high and disturbing (see figure 1).

Over the last two years, the situation concerning the adherence or acquisition of voluntary workers, the demographic change or the local competition has deteriorated. However, the problems caused by the number of laws, orders, and directives as well as the problems caused by expenses for competition sport have decreased (see figure 1).

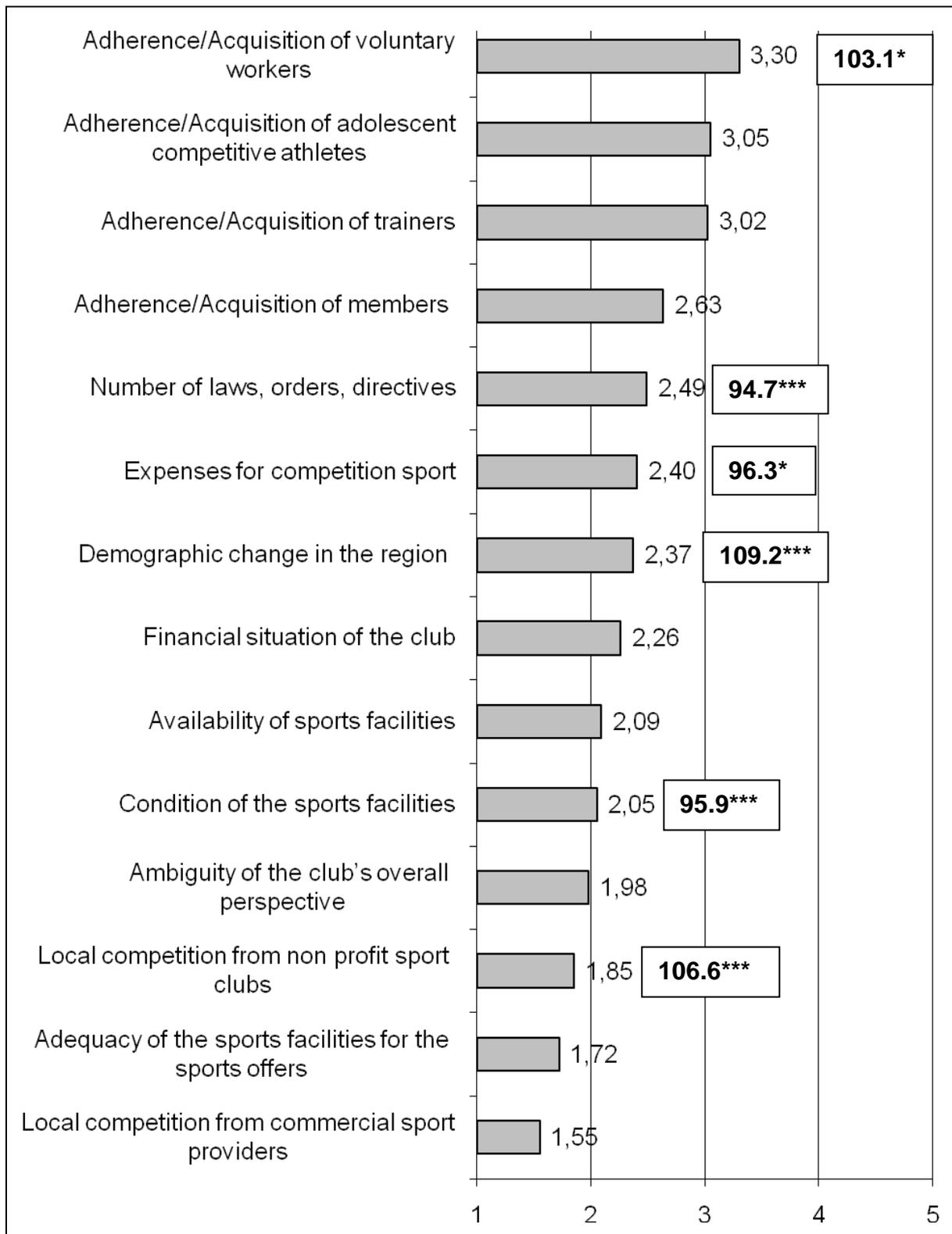


Figure 1: Problems of sports clubs according to the dimension of the problem and their development (Means; 1=no problem; 5=a very big problem).

Although the problems' values seem to be very low on average, there is still quite a number of sports clubs with existential problems. These are 15.3 % of all sports clubs or respectively 13,800 out of the 90,467 sports clubs in Germany. In this case,

the adherence or acquisition of voluntary workers or members and especially the financial situation present an existential problem for a bigger part of the sports clubs (see figure 2).

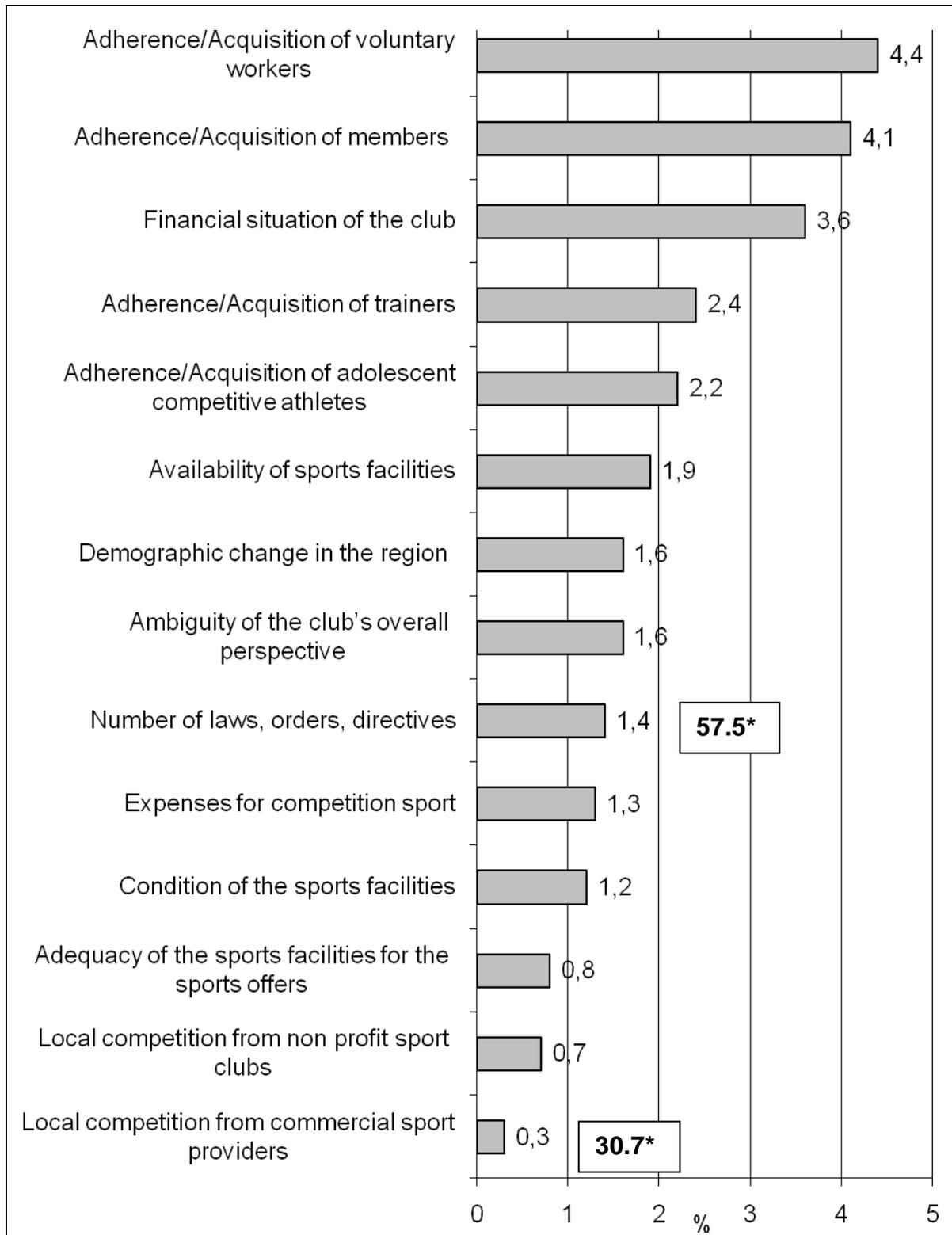


Figure 2: Proportion of sports clubs with problems which threaten their existence (in %) and their development.

3.2 Public sports facilities

Only 61 % of the sports clubs use public sports facilities, which is even less than two years ago. Altogether there are 56,000 out of the 90.674 sports clubs which use public sports facilities. Against the background of tense public households and new controlling measures, this structure of support seems to change, however. Thus, only 29.1 % of the sports clubs which use public sports facilities, neither have to pay a fee nor have to reciprocate in any other way like key power, maintenance etc.. On the other hand, 48 % of the sports clubs reciprocate in other ways for the use of public sports facilities. 43 % of the sports clubs pay user fees for the sports facilities. It has to be notified that the proportion of sports clubs paying fees for their sports facilities has experienced exceptional growth over the last two years. On average, sports clubs pay fees for 35.6 % of the hours in which they use public sports facilities.

Table 22: Use of public sports facilities and its development.

	Proportion of sports clubs (in %)	Total	Index (2005=100)
Use of public sports facilities	61.4	55,500	95.3**
...which need to be renovated	60.7	33,700	n.a.
...for user fees	42.8	23,800	124.9***
...for return service	47.5	26,400	
...free use (no service in return)	29.1	16,200	83.5*

3.3 Finances

On average the highest expenses of sports clubs in Germany are for (1) trainers and sports teachers, followed by (2) the expenses for maintenance and service of sports facilities, (3) expenses for sports equipment and sports wear as well as (4) expenses for administrative personnel (see table 23). Furthermore it is important to mention, that two types of expenses have increased significantly since the year 2005. Both the average expenses for trainers and sports teachers and the average expenses for assurances have each increased by 14 % over the last two years. Making the situation worse is the fact that during this time there was no compensation by means of the decrease of other expenses.

Table 23: Sports clubs' expenses in the year 2006 and their development.

Expenses for ...	Mean (in €)	Index (2005=100)	Proportion of sports clubs with expenses in this area (in %)
Administrative personnel	3,122		16.6
Trainers, sports teachers	11,634	113.9**	68.5
Athletes' salaries	1,076		9.9
Maintenance staff, ground keeper etc.	2,258		25.2
Expenses for sports equipment and jerseys	3,242		70.7
Expenses for the maintenance of own facilities	6,595		47.7
Rent for sport facilities	2,410		44.3
Travelling expenses for practices and competitions	1,803		44.0
Expenses for the realisation of sport festivals	2,101		52.4
Taxes to sports organisations	2,638		87.2
Taxes of all kinds	1,126		26.0
Gema fee	111		28.8
Administration costs	2,079		64.1
Assurances	1,210	114.3*	68.1
Expenses for events which are not related to sports	1,547		49.7
Debt service	2,655		24.5
Accruals	1,344		16.1
Other expenses	5,079		34.7

These increasing expenses are currently compensated by increasing membership fees, which increased by 12 % during this time span. Regarding the revenues by means of subsidies it has to be taken into account that not all of the sports clubs benefit from direct subsidies of the public authorities and often other funding possibilities remain unexploited as well (see table 24).

Table 24: Sports clubs' revenues in the year 2006 and their development.

Revenues from...	Mean (in €)	Index (2005=100)	Proportion of sports clubs with revenues in this area (in %)
Membership fees	26,937	111.8*	100.0
Admission fees	466		29.0
Donations	5,318		76.8
Public subsidies of sport organisa- tions	1,589		51.6
Public subsidies of the sport support of the federal state	697		19.3

Revenues from...	Mean (in €)	Index (2005=100)	Proportion of sports clubs with revenues in this area (in %)
Public subsidies of the sport support of the district/city/commune	2,661		54.3
European subsidies	31	n.a.	0.6
Other support programmes	597		4.6
Fund management (e.g. revenues from interests)	829		41.7
Self-managed restaurants	1,886		20.1
Sports festivals (revenues from en- trance fees etc.)	1,487		40.5
Services with costs for members	1,802		16.9
Social events	1,480		35.0
Jersey and equipment	526		11.3
Boards	919		22.7
Broadcasting rights	234		0.6
Advertisements	616		16.2
Business operations	239		1.9
Sports course fees	1,303		17.3
Services with costs for non- members	945		11.2
Raising of credit	1,892		3.5
Other revenues	4,732		28.6

3.4 Importance of support

There are some points which sports clubs consider very important: the subsidies of the regional sports confederations in the areas of basic and advanced formation of the trainers, benefits for trainers, general financial support as well as support in the areas of youth activities in sports and the support of voluntary work. Compared to last times survey the importance of support in the area of co-operation of schools and sports clubs has increased, whereas classical managerial matters such as marketing, law/assurance, and quality management are still considered fundamental but at the same time tend to be of less importance (see table 25). Assumingly, in these areas the promotion and consulting programmes of the regional sports confederations get traction, particularly as the corresponding values of satisfaction are positive for the most parts.

Table 25: Importance of and satisfaction with support (ordered by importance) and the development (Means; 3= very important, 1=not important; 3=satisfied, 1=not satisfied).

No.	Area	Importance	Index Importance (2005=100)	Satisfaction
1	Basic and advanced formation of the trainers	2.66		2.71
2	Benefits for trainers	2.66		2.20
3	Financial support of the club's activities in general	2.64		1.96
4	Help regarding youth activities in sports	2.56		2.27
5	Support of voluntary work	2.56	n.a.	1.93
6	Information and consultation regarding law and assurances	2.47	97.9*	2.43
7	Information and consultation for sports clubs in general	2.44		2.41
8	Information and consultation regarding finances/taxes	2.40		2.38
9	Financial support regarding the acquisition of sports equipment	2.36	95.7***	2.05
10	Help regarding the co-operation of schools and sports clubs	2.33	102.8*	2.22
11	Financial support regarding the construction/ modernisation of sport facilities	2.31	93.8***	2.09
12	Information and consultation regarding the adherence and acquisition of members	2.30		1.87
13	Information and consultation regarding Marketing/Sponsorship/Public relations	2.08	95.1***	2.02
14	Training courses of the club management	2.06		2.54
15	Help regarding talent scouting/- advancement	2.02		1.91
16	Help regarding the fight against doping	2.02	n.a.	2.11
17	Lobbying activities for organized sports	1.99	96.5*	1.94
18	Information and consultation regarding management and construction of sport facilities	1.99	96.6*	2.05
19	Benefits for executives and club managers	1.98	106.2***	1.72
20	Information and consultation regarding Computing/Internet/Homepage	1.95		1.97
21	Information and consultation regarding Organisation and planning	1.92		2.20
22	Information and consultation regarding demographic change	1.89	n.a.	1.93
23	Information and consultation regarding social services in sports	1.85	n.a.	1.97
24	Information and consultation regarding sports and nature	1.84	n.a.	2.02
25	Information and consultation regarding the integration of immigrants	1.79	n.a.	2.02
26	Help regarding setting up sport offers for	1.76		2.09

No.	Area	Importance	Index Importance (2005=100)	Satisfaction
	special groups			
27	Information and consultation regarding advancement of women	1.72		2.01
28	Information and material regarding the German sports badge	1.69	n.a.	2.46
29	Information and consultation regarding quality management	1.68	95.3**	1.93
30	Information and consultation regarding event management	1.68		1.98
31	Information and consultation regarding staffing	1.63	n.a.	1.92
32	Information and consultation regarding taking charge of public sport facilities	1.61		1.84

Here, the question comes up how the regional sports confederations could optimise their consultation and support for sports clubs. The importance-satisfaction raster is created in order to identify the room for improvement. The areas of support which have to be optimised above all are those which are very important from a sports club's perspective and which, at the same time, the sports clubs are unsatisfied with (see figure 3; area "Make an effort!").

The following areas of support should be optimised from a sports club's perspective: (3) financial support of the sports clubs in general, (5) help regarding the voluntary work, (12) information and consultation regarding the adherence and acquisition of members, and (15) help regarding talent scouting/-advancement.

On the other hand, from a sports club's perspective the regional sports confederations seem to do quite well in the areas of (1) basic and advanced formation of the trainers, (2) benefits for trainers, (4) help regarding youth activities in sports, (6) information and consultation regarding law and assurances, (7) information and consultation for sports clubs in general, (8) information and consultation regarding finances/taxes, (9) financial support regarding the acquisition of sports equipment, (10) help regarding the co-operation of schools and sports clubs, (11) financial support regarding the construction/modernisation of sport facilities, (13) information and consultation regarding marketing/sponsorship/public relations, (14) training courses of the club management, and (16) help regarding the fight against doping.

The areas in which the regional sports confederations are well positioned regarding the effectiveness of the support but in which they are on average too engaged regarding efficiency-considerations are the following: (18) information and consultation regarding management and construction of sport facilities, (21) information and consultation regarding organisation and planning, (25) information and consultation re-

garding the integration of migrants, (26) help regarding setting up sport offers for special groups, (27) information and consultation regarding advancement of women, (28) information and material regarding the German sports badge.

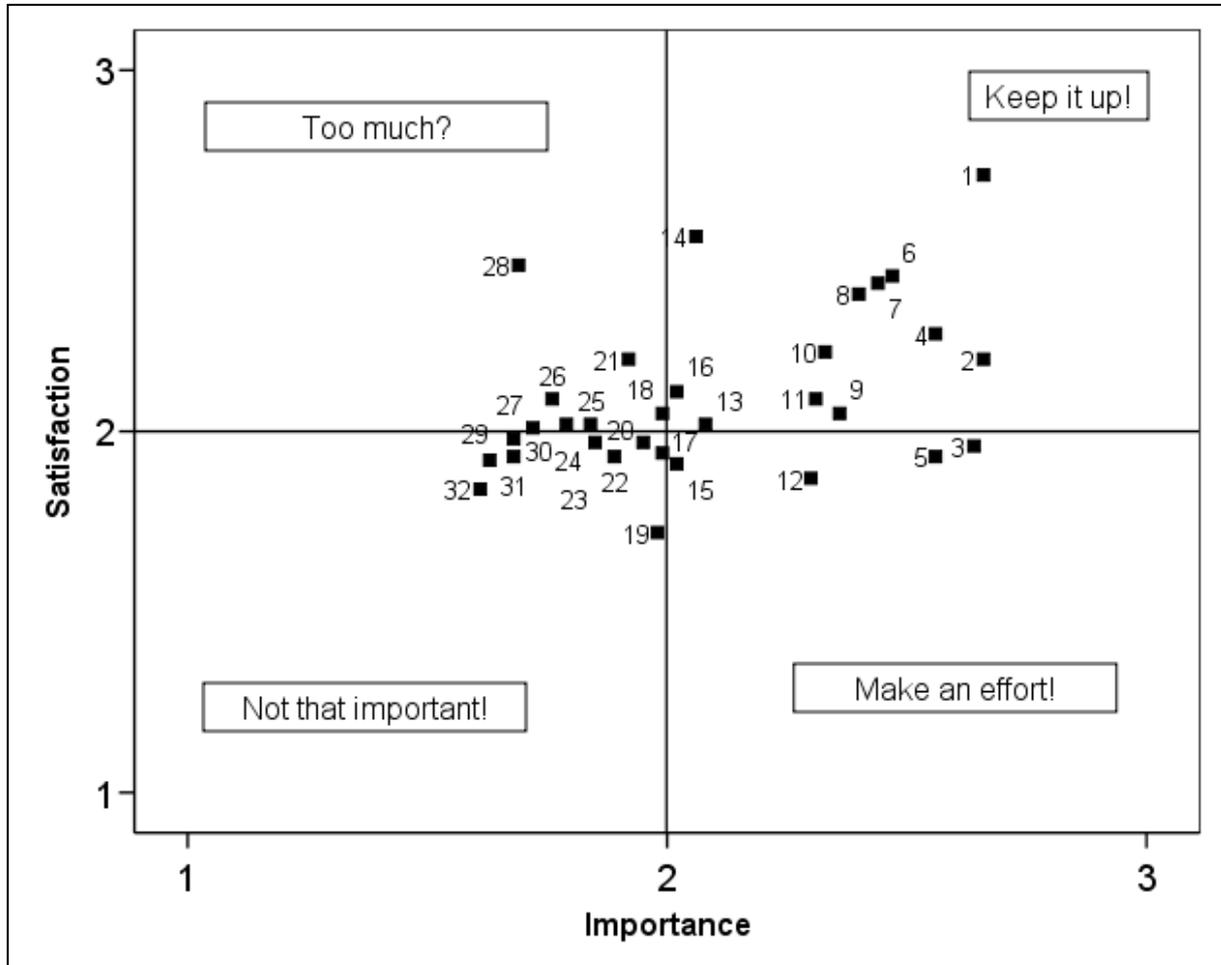


Figure 3: Matrix of the importance and satisfaction with support (means; legend see table 25).

4 Methodology

4.1 Background

The sports development reports – “analysis of the situation of sports clubs in Germany” present an advancement of the financial and structural analysis of sports in Germany (FISAS). The objective is to provide policy-makers in organised sports 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 regional sports confederations, the German Olympic Sports Association (DOSB) as well as the Federal Institute of Sports Science (BISp)³. On June 26th in 2007 Univ.-Prof. Dr. Christoph Breuer from the Institute of Sport Economics and Sport Management of the German Sport University Cologne was assigned to carry out the second and third survey for the sports development reports. The methodological central idea was to create a panel design, which means that the same sports clubs should be questioned on their situation every two years. Therewith, the first two surveys of the sports development reports (2005/06 und 2007/08) present systematic information on 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 survey. The survey was carried out from September 17th to December 10th of 2007. The sample was based on the email addresses of sports clubs which were provided by the regional sports confederations. Out of the 90,467 existent sports clubs in Germany 45,270 were made available. The number of provided email addresses was different from federal state to federal state. After the deletion of double provided email addresses, 44,367 sports clubs were contacted via email. Sports clubs, which could not participate for whatever reasons, were taken out of the sample. A bigger part of the failures (about 7,000) were due to false email addresses. Altogether n=13,068 interviews could be realised, which equals a response rate of 35.1 % (see table 26). Compared to the first survey the sample was tripled and the participation rate increased by a factor of 1.7.

³ Geschäftszeichen IIA1-080902/07-08.

Table 26: Sample of the sports development report 2007/08 for Germany.

Sports development report 2007/08	N	Proportion of sample I (in %)	Proportion of sample II (in %)
Population	90,467		
Sample I	44,367	100.0	
False email addresses, person is not part of the sports club anymore, club no longer existent, refusal	7,161		
Adjusted sample II	37,206		100.0
Realised interviews	13,068		
Participation (in %)	14.4	29.4	35.1

4.3 Longitudinal data und calculation of indexes

With regard to the construction of a longitudinal database all sports clubs of the second survey were given unchangeable numbers (ids) which were also assigned to the first survey. This number makes an identification of the sports clubs possible which participated in both surveys. Altogether, n=1,648 sports clubs participated in both surveys.

Beginning with the second survey, changes of the common welfare production as well as of the problems of German sports clubs can be measured based on the longitudinal analysis. The dimension of this change is made clear by means of indexes, which demonstrate the percental change. The calculation of the indexes is based on the value of the 2005/2006 database and is set to 100. Consequently, the initial value is 100 %. Accordingly, an index of 112 % would equal an increase of 12 % compared to the value of 2005/2006. Moreover, it was checked whether the indexes' changes were statistically significant (test of significance: t-test). The underlying report will only present the significant indexes. The probability of error which is important in order to determine the significance is demonstrated with the common designation:

- * = The probability of error of the calculation is equal/less than 5 %
- ** = The probability of error of the calculation is equal/less than 1 %
- *** = The probability of error of the calculation is equal/less than 0.1 %

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Additional detailed information and downloads regarding the sports development report at
www.dosb.de/de/sportentwicklung/sportentwicklung/sportentwicklungsberichte/
www.bisp.de under the category News: Report from the 12th of June 2008

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