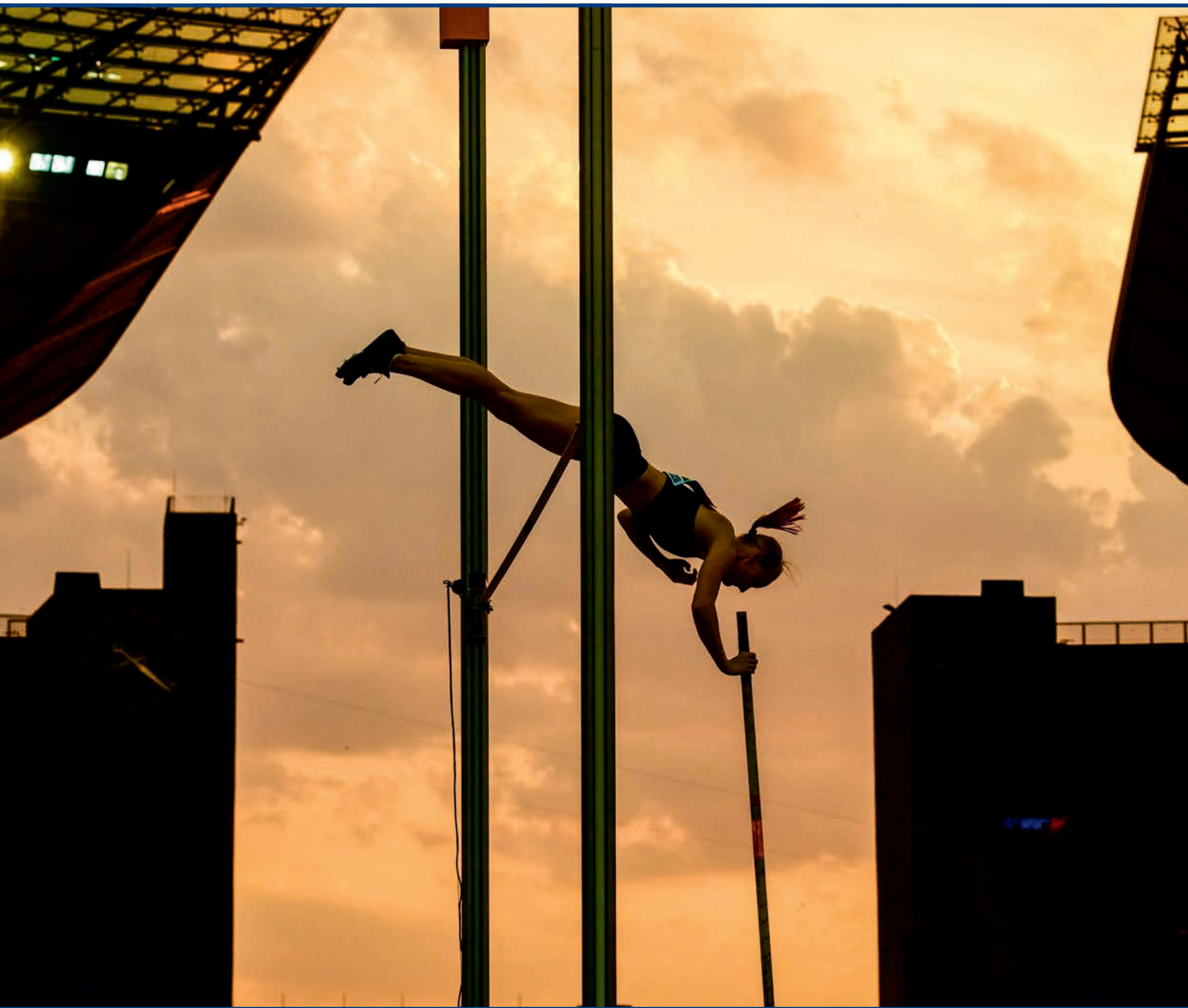
SPOAC

SPORTS BUSINESS ACADEMY

BY WHU



SPOAC Sports Business Study 2019

Photo: iStock Photo

PREFACE

Dear readers,

The SPOAC sports business studies of the past two years demonstrated that the requirements and preferences of future consumers will fundamentally change the sports business and the associated challenges for sports companies. In this, the fourth edition of our annual study, we focus on the topic of „talent“; and we ask which personnel the sports business needs to stay on course and successfully navigate the storms of digitisation.

One thing is clear: the „war for talent“ does not stop in the most exciting industry in the world. The competition for the best talent - both in management and in specialized roles such as data analysis, customer relationship management, or content production - has long been hard-fought. At the same time, digital heavyweights such as DAZN and international corporations such as Amazon and Facebook are exploring the sports market and competing with established companies, clubs, and associations for the best minds. The demand for top-class employees will only increase in the future: According to our mood index for 2019, decision-makers in the sports business expect at least moderate growth over the next five years.

In competition for top talent, the sports business discovered former top athletes[1] as a talent pool at an early stage. The crucial question, however, is whether athletes really bring promising human capital with them after their sporting careers. If they do: How can the sports business sector manage to use these talents profitably and to retain them long-term? The sports business would be well advised to deal intensively with this topic in order to gain an advantage over the strong competition in the employer market. In addition to the selection of the right personnel, targeted training and further education also play a decisive role in retaining talent.

We generated our findings from a survey of a total of 166 investors, managers, and employees in the sports business sector. In addition, we interviewed 299 active and former top athletes as comparison groups for our study with the Stiftung Deutsche Sporthilfe. We are very grateful to those who participated.

We hope that the SPOAC Sports business study will again trigger a constructive discourse and contribute to the on-going professionalization of our industry. Comments and feedback in any form are welcome.

S. L. Schmidt　　P. Klotz

Prof. Dr. Sascha L. Schmidt
Akademischer Leiter
SPOAC – Sports Business Academy by WHU

Philipp Klotz
Geschäftsführer und Mitherausgeber
SPONSOR[S] Verlags GmbH

[1]This refers to both male and female athletes throughout the report

CONTENT

Photo: Imago

Photo: imago

THE MOST IMPORTANT THINGS IN A NUTSHELL: **THREE CENTRAL IMPLICATIONS FOR THE HEADS OF SPORTS BUSINESS**

1. **Growth in the sports business? Yes! – Time for comfort? No!**
The Sports business sentiment index gives hope for positive sales development in all major categories for the next five years. Media sales in the digital sector are, in particular, seen as the main driver of sustained growth. The commercial business is still seen as promising, at least in terms of sponsoring, while the growth prospects in the day-to-day ticketing and hospitality business are less positive than before. Despite overall positive development, the sentiment index shows a declining growth dynamic. This trend should make decision-makers in the sports business sit up and take notice. Business as usual will no longer be sufficient to maintain the above-average growth of recent years. The comfort is limited, so all organizations in the sports business should develop their own diversification strategies to tap new markets and sales potential.

2. **With commitment and discipline - „secret weapon“ Top athletes in the War for Talent!**
The economic challenge in the sports business can only be mastered with outstanding talent. In the battle for talent, the top stags of the sports business are now, more than ever before, in competition with international digital corporations and tech giants. However, the sports business has an ace up its sleeve with former top athletes: They impress with outstanding commitment and discipline - two personality traits that are essential for professional success, according to the sports business management surveyed. The industry is well-advised to actively and specifically involve its former top athletes in the business and to keep an eye on a proper proportion of female executives.

3. **Digitisation and soft skills - with further training for success!**
To remain successful in the long term, the sports business needs new know-how. In particular, the surveyed decision-makers see the need for further skills in digitisation and softer skills like communication. In the course of professionalizing the entire industry, the targeted involvement of experts is an important step. However, external consultants with experience from other industries cannot replace industry employees, but can certainly supplement their skills for the short-term. Targeted further training of one‘s own team becomes essential. Not surprisingly, the surveyed decision-makers named digitisation as a top training field. Interestingly, it is not the classic topics of internationalization or sales that follow, but leadership, communication and personality development.

Photo: imago
(Hannes Aigner, SPOAC-Participant)

ALL SIGNS CONTINUE TO POINT TO GROWTH? **THE 2019 SPORTS BUSINESS SENTIMENT INDEX**

2018 was an ambivalent year for the sports business in many respects. Despite the disappointing performance of the DFB team in Russia, King Football has made financial gains. Both the Bundesliga and the majority of clubs reported record sales in the 2017/18 season[2]. Even greater success is likely to prevail in the eSports business. The willingness to pay for electronic sports continues to rise - this applies equally to sponsors and fans[3]. Fans are flocking in droves to major events like ESL One in Cologne and consuming eSport content on the Internet around the clock. One person's joy is another person's suffering: Although smaller leagues such as DEL, BBL and HBL are experiencing slight increases in sales, all three are struggling with stagnating or even declining viewer numbers. An alarm signal for future sales!

Understanding these developments, investors, managers and employees of the sports business from Germany, Austria, and Switzerland (DACH region) forsee the following for the next five years: Media revenues and commercial and daily sales will continue to grow. On closer inspection, however, the outlook is more subdued when compared to 2017 in all revenue categories (Figure 1). We will explore each of these predictions in turn.

[2]Deloitte Annual Review of Football Finance 2018 (https://www2.deloitte.com/de/de/pages/presse/contents/annual-review-of-football-finance-2018.html)
[3]PwC Sports Survey 2018 (https://www.pwc.ch/en/insights/sport/sports-survey-2018.html)

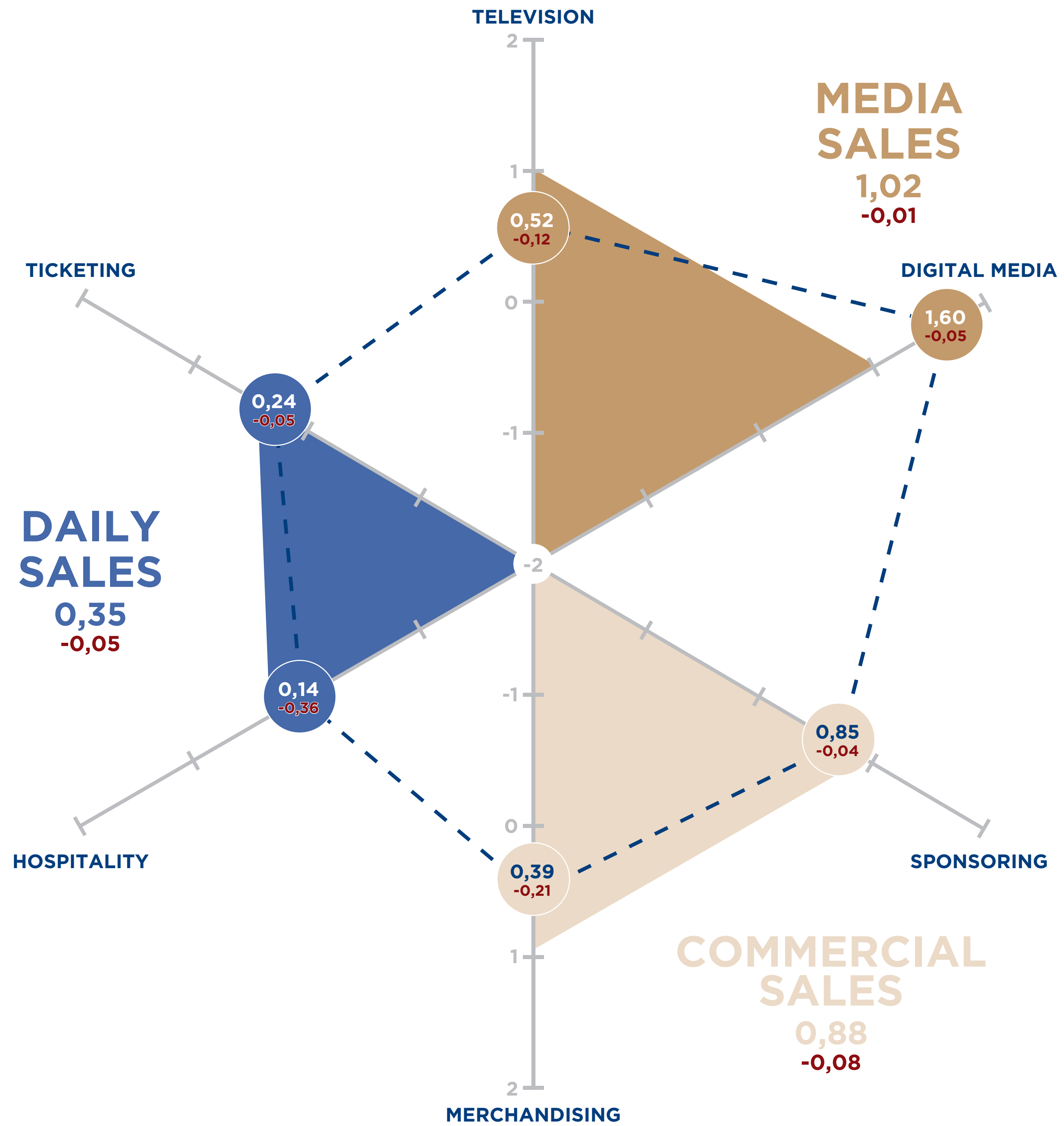
SPORTS BUSINESS SENTIMENT INDEX

FIGURE 1

ANTICIPATED REVENUE DEVELOPMENT
FOR THE NEXT 5 YEARS

2 very positive
1 rather positive
0 neither positive nor negative
-1 rather negative
-2 very negative

Increase compared to 2018
Decrease compared to 2018



MEDIA SALES

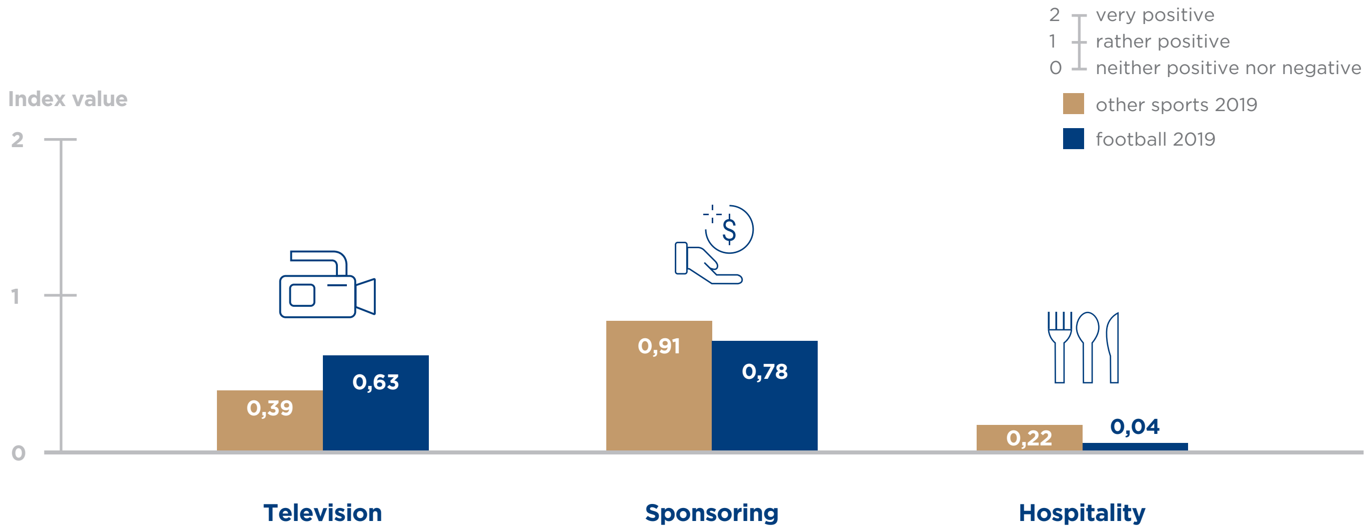
According to the respondents, media sales will be the main driver of growth for the next 5 years. The dynamics in this category are comparable to 2017 with an index value of 1.02[4] (delta: -1%). Digital sales remain the strongest growth area. At 1.6, the index value is the highest in all subcategories, although, here too the expected growth rate is slightly lower compared to last year (1.60; delta: -3%). Expectations of future television monies are falling much more sharply (0.52; delta: -19%). This trend is foreseen particular by decision-makers outside football. Looking at this group separately, the index value of 0.39 does not suggest that the TV business will grow significantly (Figure 2). Football executives, on the other hand, look ahead somewhat more positively in this sub-category (0.63), which is certainly related to expectations for the next rights allocation of the German Soccer League.

In addition, the survey results clearly show the cross-sports contract in terms of media revenues—innovative concepts are in demand. While television will only contribute to growth to a limited extent, hopes are pinned on digital channels. In particular, the production of proprietary content for digital marketing will increasingly be at the forefront. The popularity of Amazon series like „All or nothing" and the DAZN documentary „Being Mario Götze" show that fans are reacting positively to new formats.

SPORTS BUSINESS SENTIMENT INDEX

DETAILS – ANTICIPATED REVENUE DEVELOPMENT

FIGURE 2



COMMERCIAL REVENUES

Commercial sales also showed a solid positive development (0.88; delta: -8%). Continuing growth in the sponsoring business (0.85; delta: -5%), in particular, give cause for optimism in this category. Despite new (international) marketing opportunities through digital perimeter advertising, football decision-makers are somewhat more pessimistic. With an index value of 0.78, they estimate sponsoring growth to be 0.13 index points lower than managers outside football. Large sports sponsors, in particular, who have so far been found in professional football, are obviously recognising alternative advertising potential. On the one hand, the superstars of sport are increasingly marketed directly, which is accompanied by a reallocation of sponsoring funds. On the other hand, more and more sponsors are venturing into new areas such as eSports. Individualised advertising via (micro-) influencers is also becoming better understood by sponsors.

The biggest loser in the category of commercial turnover is merchandising. The decision-makers surveyed see significantly lower growth potential here than last year (index value 0.39; delta -36%). In their opinion, this trend applies to all sports. Saturation is to be expected with regard to the current product portfolio of the clubs.

DAILY REVENUES

With regard to daily turnover in sports facilities, the decision-makers surveyed were the most pessimistic. Although the index value of 0.38 in this category suggests a slight increase in turnover, the significant drop in expectations (delta: -14%) should be an alarm signal. In particular, the hospitality business is reaching its capacity limit (0.14; delta: -73%). The decision-makers from football rated this subcategory on average 0.04 index points, which means stagnation. New ideas such as Fortuna Düsseldorf's „handwerksPARTNER" concept can help. Here, previously unused cabins under the stands of the MERKUR match arena are converted into catering areas and sold in bundles with seat tickets as a discounted hospitality package. This is an exciting approach that shows that creative offers can still tap potential in the hospitality category as well.

Not quite as drastic, but nevertheless declining, are the expectations of decision-makers when it comes to ticketing. Here, too, an index value of 0.24 gives reason to hope for only limited growth (delta: -18%). Decision-makers see a saturation of demand, as evidenced by stagnating ticket numbers and higher no-show rates in almost all sports[5]. Dynamic pricing models and mobile payment systems are cited as promising by the managers surveyed. Innovation around stadium visits seems indispensable for future growth in this area.

[4] Calculation of index based on the following categories: +2 = "very positive"; +1,0 = „rather positive"; ±0,0 = "Neiter nor"; -1,0 = "rather negative "; -2,0 = "very negative "

[5] Schreyer, D., & Däuper, D. (2018). Determinants of spectator no-show behaviour: first empirical evidence from the German Bundesliga. Applied Economics Letters, 1-6

SUCCESS IN SPORTS BUSINESS PART I: **THESE GUYS ARE IN DEMAND!**

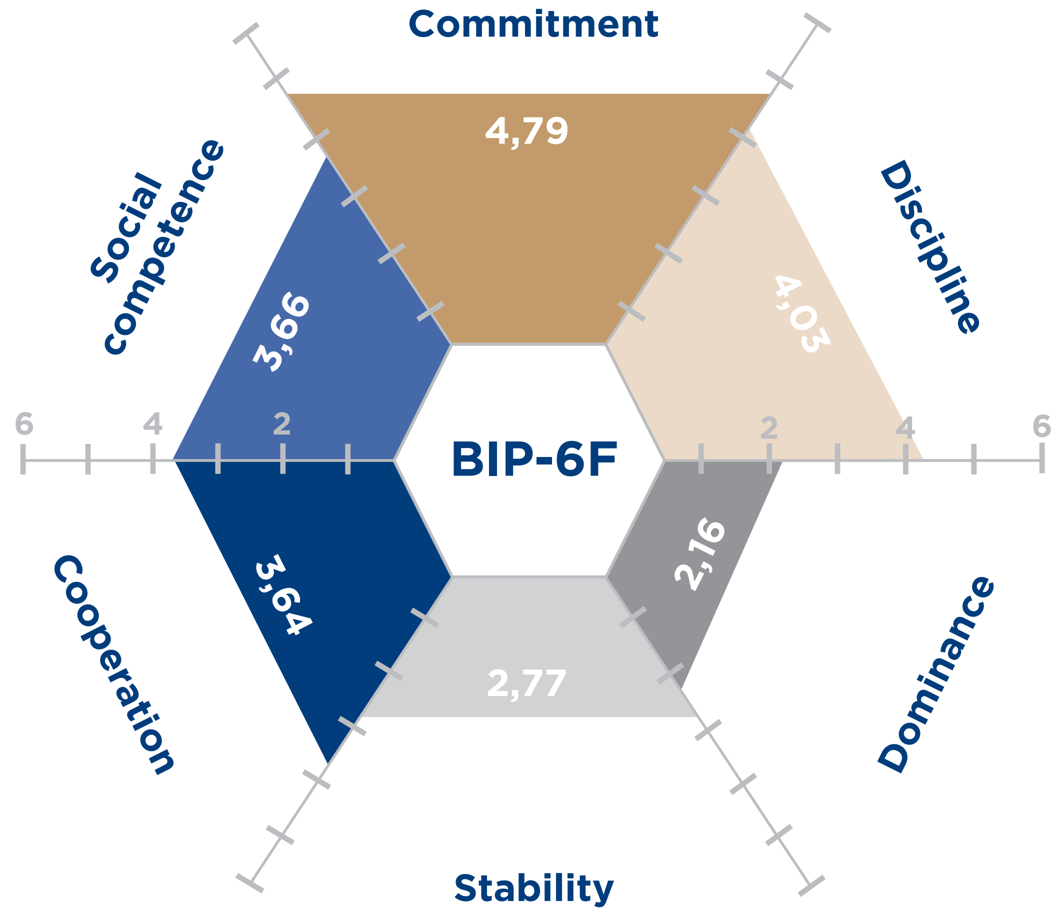
The long-standing growth in the sports business is confirmed by the current sentiment index, despite the slight decrease in momentum. This signals the growing need for talented employees for almost all organisations in the industry. In the battle for talent, the sports business has been in a relatively comfortable position as the industry is attractive to many people. This statement remains true. The emotionality and reach of brands in the sports business are a big plus, but will not be enough in the future. Talent is becoming scarcer and more demanding. This makes it all the more important for decision-makers in the industry to know which profiles are promising for the success of their organization.

Clubs and associations have recognized a large pool of promising profiles at an early stage, namely their own top athletes after exciting active sports careers. Whether a disproportionately high proportion of former athletes is a blessing or a curse for an organization is questionable. One thing, however, is clear: top athletes have invested a lot of time in their sport during their active career and have therefore often had to cut back on their education. 38% of the decision-makers surveyed see a disadvantage for top athletes when starting their business career after their sports career, whereas 33% see an advantage.

FIGURE 3

General personality profile for succes in sports business

SURVEY RESULTS ALONG THE BIP-6F MODEL



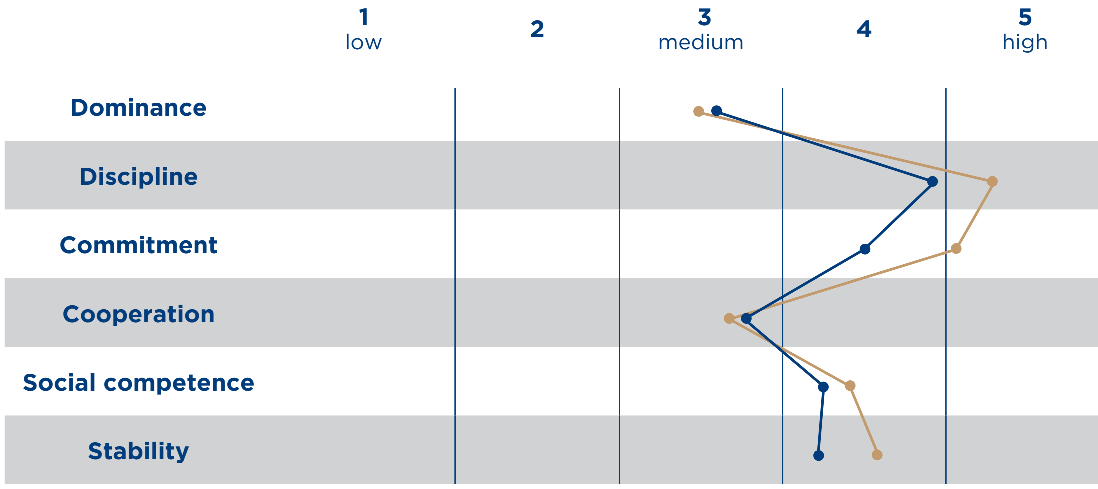
In order to shed more light on the question of the human capital of top athletes for sports business organisations, we first asked the industry's decision-makers in very general terms: what personality traits are relevant to success in the sports business? The survey was based on the six dimensions of the Bochum Inventory of Occupational Personality (BIP-6F): discipline, dominance, commitment, cooperation, social competence, stability[6]. The interviewed decision-makers ranked these six dimensions according to their importance. Respondents identified commitment and discipline as the two most important personality traits for success (Figure 3).

[6] For details see page 24

Personality traits

COMPARISON OF TOP ATHLETES AND MANAGERS IN GENERAL

FIGURE 4



Interestingly, an earlier study of more than 1,000 top athletes and almost 8,000 employed specialists and managers in a peer group shows that commitment and discipline are particularly pronounced among top athletes (Figure 4)[7]. A strong emphasis on the commitment dimension points to particularly ambitious individuals who often see themselves as the driving force behind progress and change. Discipline, on the other hand, is an indication of a systematic, reliable, and detailed way of working.

At first glance, top athletes correspond to the profile critical to success that is generally drawn by the decision-makers surveyed. This is a first indication that former athletes do indeed meet the most important requirements for professional success in the sports business on the basis of their personality.

A LOOK AT THE (JUNIOR) MANAGERS IN DETAIL

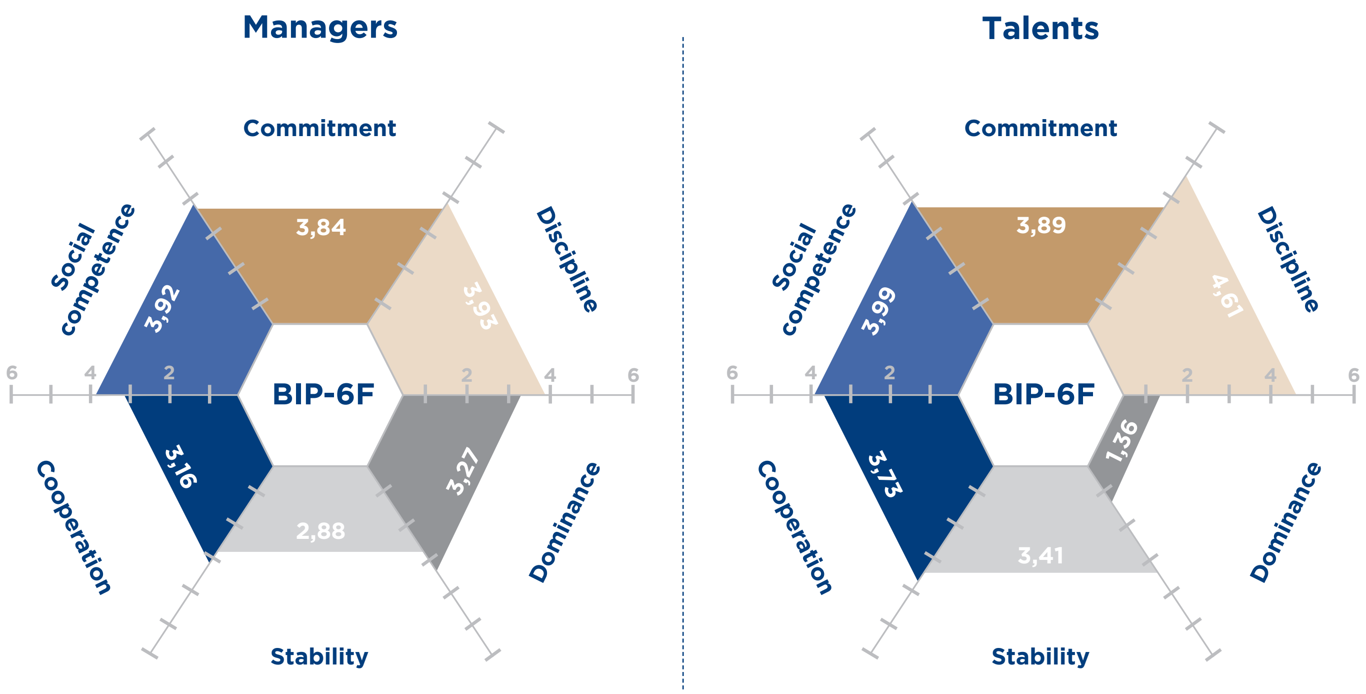
To take a closer look at the top athlete with regard to their personality traits, we interviewed 299 active and former athletes on the basis of the „five-factor model“ with the support of Stiftung Deutsche Sporthilfe[8]. The results show differences between male and female athletes; individual and team sport athletes also differ. It turns out that female athletes show a significantly higher degree of cooperation in their personality profile. On average, they are more willing to compromise, more capable of integration, and achieve better results in the team. Surprisingly, the stability factor is more pronounced in team athletes than in individual athletes. They are, therefore, more relaxed, more self-confident, and often have a higher tolerance for frustration.

[7] Kollege Spitzensportler – Chancen für Wirtschaft und Athleten (N = 8.763). (https://www.sporthilfe.de/fileadmin/pdf/Studien/Kollege_Spitzensportler_2013.pdf)
[8] For details see page 28

Detailed personality profiles for success in sports business

FIGURE 5

SURVEY RESULTS FOR MANAGERS AND TALENTS



These findings are particularly interesting against the background of a differentiated view on managers and talents. In the opinion of surveyed decision-makers, junior managers will have to meet higher demands in terms of cooperation and stability (Figure 5). Among the athletes of Deutsche Sporthilfe, female team athletes meet the catalogue of requirements particularly well; but, the ideal profile of a manager is more in line with the personality traits of male athletes. This result can be interpreted in many ways. For example, it can be questioned whether the assessment of managers is a so-called „self-fulfilling prophecy". In other words, a questioned executive draws an ideal picture that largely corresponds to his or her own personality profile. Considering the current gender distribution in sports business leadership, this assumption is legitimate and such a distortion of perception in surveys is quite normal.

More exciting, however, is the interpretation of the above-mentioned requirements for junior managers. Here, we can pick up on the current gender debate in the sports business. According to a study by the anti-discrimination network Football Against Racism, only 3.7 percent of all management positions in European football were filled by women at the beginning of 2018. This is an alarmingly low figure, which all also entails economic disadvantages. Numerous research studies show that diversity in management (e.g. innovative strength and creativity) has a positive influence on a company. Gender is, of course, only one component of diversity, but a very central one. Initial initiatives, such as the Women's Lounge of ISPO Munich and successful role models like Katja Kraus (JvM Sports), Heike Ulrich (DFB) or Veronika Rücker (DOSB), are working to ensure that women are perceived as a relevant target group for (junior) management positions in the sports business[9]. Based on survey results, women clearly have the described characteristics for success.

LESS THAN HALF OF COMPANIES IN THE SPORTS BUSINESS EMPLOY FORMER TOP ATHLETES

In view of the results of the study, it seems reasonable for companies in the sports business to consider former top athletes as employees. Only 41% of the decision-makers surveyed state that they employ former top athletes in their organisation - a percentage that is almost constant across all sports. It is all the more exciting then that 84% of the decision-makers surveyed, who currently do not employ any former top athletes, would welcome athletes to their circle of colleagues. The reasons given are manifold: „Exciting characters with interesting experiences"; „New perspectives and a breath of fresh air"; „Radiance and personality"; and, „Other mindsets … would benefit the organization".

Former athletes from all sports, regardless of gender, should be in demand in the sports business. It is the task of industry leaders to identify and promote suitable former athletes and develop them so that they can meet the requirements of their organization. This point is extremely relevant, because only very few top athletes will end their active careers with all the necessary professional and methodological knowledge to succeed in a different capacity. However, these skills that can be learned relatively quickly, while personality traits such as commitment and discipline are, depending on your perspective, given, developed over longer periods, and can only be changed to a limited extent.

Logically, not every former athlete fits every job and every company. This makes the targeted selection of talent all the more important. Only every sixth manager (16.1%) who employs one or more top athletes in their organisation has a structured process for targeted recruitment of athletes. A prime example of this is the so-called password application, which is gradually being used outside the sports business[10]. Former athletes can use proof of their sporting career to compensate for any deficits in school grades or other academic achievement. In addition to this procedural adjustment, a targeted approach of the athletes can also facilitate access to this promising talent pool.

[9] https://www.odgersberndtson.com/media/6715/hsb.pdf
[10] Enterprises like Telekom, Lufthansa, Deutsche Bank, and Mercedes-Benz have already implemented password application processes

SUCCESS IN THE SPORTS BUSINESS PART II: **THIS EXPERTISE IS IN DEMAND!**

In addition to personality traits, professional expertise also plays a central role for both the success of each individual and for the performance of an organization. For this reason, we asked sports business executives which training topics will be the most important for success in their area in the future. We also examined how much importance is attached to training in the sports business and how the industry compares with other industries.

FIGURE 6

Most important training topics in sports business

TRAINING NEEDS, PARTICULARLY IN DIGITISATION AND SOFT SKILLS

For 26 categories from A for „agile working methods“ to Z for „time management“, we asked decision makers in the sports business to assess the importance of different training topics. The clear winner was digitisation, with an average weighting of 4.2 out of 5 possible points[11](Figure 6).

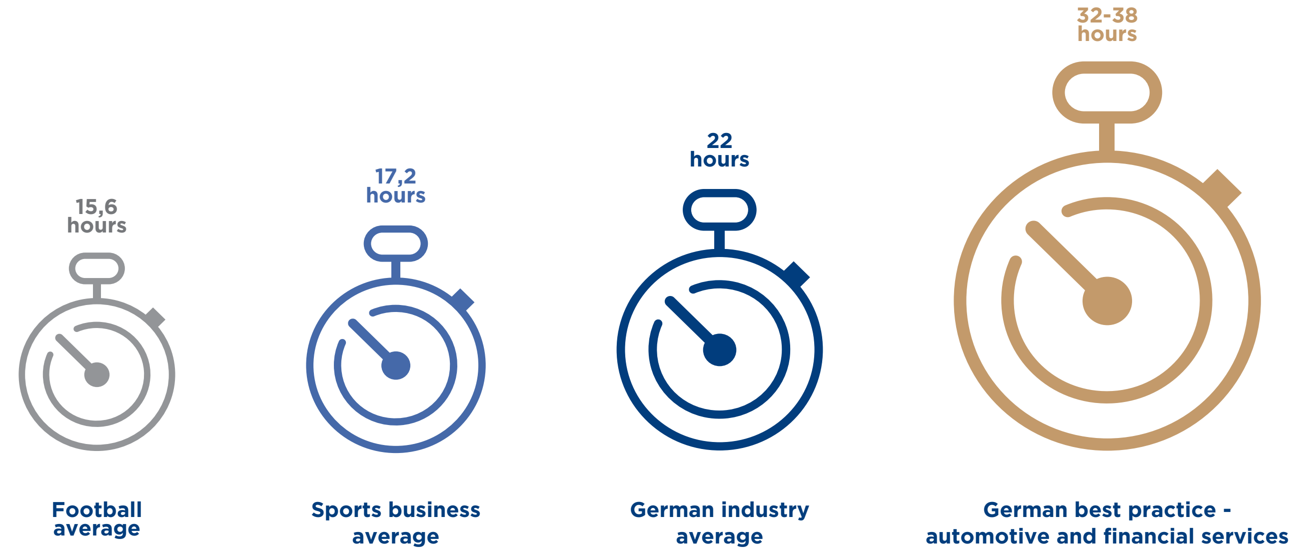
It was to be expected that digitisation would be a central topic of the training needs. More surprising, on the other hand, are the three other fields of continuing education that landed at the top of our survey: Leadership (average: 4.0), communication (average: 3.9) and personality development (average: 3.9). Classical topics such as internationalisation (average: 3.5) or sales (average: 3.4) were relegated to places of lesser importance. The industry‘s decision-makers obviously recognize that the idea of the „born leader“ is antiquated and that technical and soft skills are of importance in times of digitisation.

[11]Calculation of importance based on the following categories: 1 point = “very low““; 2 Punkte = “low“; 3 Punkte = “medium“; 4 Punkte = “high“; 5 Punkte = “very high“

Training in sports business

COMPARISON WITH OTHER INDUSTRIES

FIGURE 7



FOCUS ON FURTHER TRAINING IN SPORTS BUSINESS BELOW AVERAGE

In addition to content, sports business decision-makers surveyed also commented on the scope of the training.

According to the present study, the average yearly training allocation in the sports business is 17.2 hours; in the football industry, this figure is as low as 15.6 hours[12]. In a nationwide comparison, the sports business in the DACH region is below average at 22 hours for each participating employee[13]. The top performer in this category is the automotive industry followed by the financial sector with an average of 38 and 32 hour of advanced training, respectively (Figure 7).

The leading industries have been fighting for talent for years and are confronted with digital challenges and strong competition from abroad; the sports business is also moving in this direction. They have discovered that further training is not only a means to absorb and pass on knowledge, but is also an attractive argument for their employer brand. The sports business can learn from the knowledge and practices of these industries.

[12] Assumption: One day of training consists of 6 hours in class

[13] Statistisches Bundesamt: Weiterbildung im Unternehmen (https://www.destatis.de/DE/Publikationen/Thematisch/BildungForschungKultur/Weiterbildung/WeiterbildungUnternehmen.html)

Photo: Imago

Photo: Imago

OUTLOOK

The study results show that former top athletes can be an interesting reservoir for human capital. The natural proximity of the industry to the athletes offers great opportunity to benefit from this potential. It is a logical course for top athletes are considering a career in the sports business. Our industry should consciously exploit this small advantage over other branches of industry in order to siphon off the top talent from the pool of former top athletes.

The promising personality traits of athletes also peaks the interest of management in other industries; thus, the intensity of the competition for these talents will increase. To ensure that the best (junior) managers continue to opt for our industry in the future, attractive job offers are of central importance. Here we should take advantage of the general appeal of the sports business, but not rely on it alone. Rather, industry organizations should position themselves as exciting employer brands by providing their talents with an ideal environment for personal and professional development.

An open and innovation-promoting culture within the company is of great importance for this positioning. Today more than ever, (junior) managers are looking for the freedom to develop and implement their own ideas. Our task within the industry will be to give these talented people the confidence and responsibility to achieve their best results. For some sports business organisations, this means breaking down structures and questioning processes. It may also be necessary to break new ground in terms of personnel recruitment and development. Flexible and goal-oriented continued education and training will be of immense importance in the future, particularly when considering the ever faster technological and social. Whoever is prepared to face the competition for the best minds will benefit as an employer brand; and, this applies not only to former top athletes but also to all future employees.

RESEARCH DESIGN AND METHODOLOGY

DATA COLLECTION AND ANALYSIS

With the help of a special SPONSOR[5] newsletter, subscribers were invited to participate in a 10-minute online survey. The survey was closed on 18 December 2018. By this time, 168 questionnaires had been completed in full; of which, 166 were fully usable. This corresponds to a response rate of 25.2%.

The annual mood index, determined by three sales categories and six subcategories, utilized a five-level scale ("very positive", "rather positive", "neither positive nor negative", "rather negative" or "very negative"). To calculate the sentiment index, we translated these ratings into numerical values ("very positive" corresponded to +2 and "very negative" to -2) then averaged the results. For example, the value of +1.6 for expectations of digital media revenues is composed of 102 "very positive", 62 "rather positive", and 2 "neither positive nor negative" ratings.

The six-factor model of the Bochum Inventory for Occupational Personality (BIP-6F) was used as the basis for the analysis of the success-critical personality profile[14] (Figure 8). The dimensions of the BIP-6F model can be described as follows[15]:

Commitment: This factor describes how ambitiously a person pursues their professional goals. It includes three facets: career orientation, performance orientation, and competitive orientation. For example, people with a low level of commitment are also satisfied with mediocre performance; they do not see themselves as initiators of change. Conversely, people with a high level of commitment are extremely ambitious and achievement-oriented; they see themselves as driving forces for progress and change.
Discipline: This factor describes how doggedly a person plans and works. Discipline, by this definition, includes detail orientation, reliability, and a need for security. People with less discipline pay less attention to details and act more spontaneously. People with more discipline plan and carry out activities systematically and reliably and make decisions only after thorough analysis.
Social competence: This factor describes how actively a person participates in social situations. Social competence includes sociability, empathy, and enthusiasm. People with a low level of this factor tend to act cautiously and stay in the background. They are rather insecure and may avoid dealing with difficult or new people. People with a high level of social competence like to approach others, make contacts quickly, and have adapt instinctually to deal with different characters.
Cooperation: This factor describes to what extent people prefer team or individual work. Cooperation is measured by team orientation, willingness to compromise, and the ability to integrate. People with a low level of this factor prefer to work alone and are reluctant to coordinate with others. People with a high level of cooperation actually seek it out; they achieve the best results in a team.
Dominance: This factor describes how a person asserts his own interests. Dominance is measured by assertiveness, independence, and willingness to engage in conflict. People with a low level of this factor concede easily in discussions, adapt to the opinions of others, and strive for understanding and harmony. People with a high level of this factor assert their own points of view despite resistance and they think and act independently of the opinions of others.

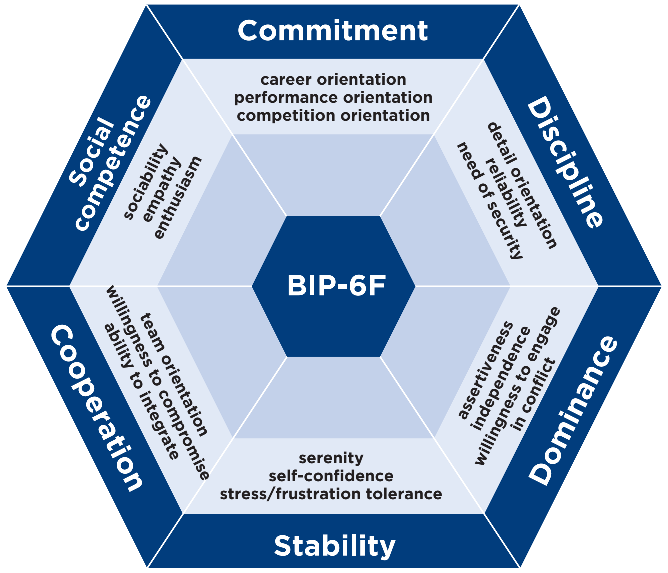
[14]Hossiep, R. & Paschen, M. (2003): Bochumer Inventar zur berufsbezogenen Persönlichkeitsbeschreibung– BIP (2. Vollständig überarbeitete Aufl.). Göttingen: Hogrefe
[15]Hossiep, R. & Krüger, C. (2012): Das Bochumer Inventar zur berufsbezogenen Persönlichkeitsbeschreibung – 6 Faktoren (BIP-6F). Göttingen: Hogrefe

Stability: This factor describes how robust someone is in the face of stress. Stability includes serenity, self-confidence, and stress/frustration tolerance. People with a low level of this factor are quickly discouraged by failures and take criticism to heart. People with a high level of stability are self-confident and motivated even without immediate recognition and reward.

Respondents to the survey ranked the six dimensions of BIP-6F (dominance, discipline, commitment, cooperation, social competence and stability) by importance. We excluded answers that did not show any change when compared to the default order with significantly shorter processing times. For this section of the survey, 162 answers were included in the evaluation.

Business-focused Inventory of Personality - 6 Factors

FIGURE 8



Additionally, we surveyed 299 active and former athletes of Deutsche Sporthilfe. The applied „five-factor model" is based on Goldberg's published variant of the „Big Five Inventory"; it is comprised of 44 questions[16]. This model divides personality along five main dimensions: extraversion, compatibility, conscientiousness, emotional stability, and openness to experiences. These five dimensions are characterized by their stability, autonomy and independence from culture.

SURVEY PARTNER

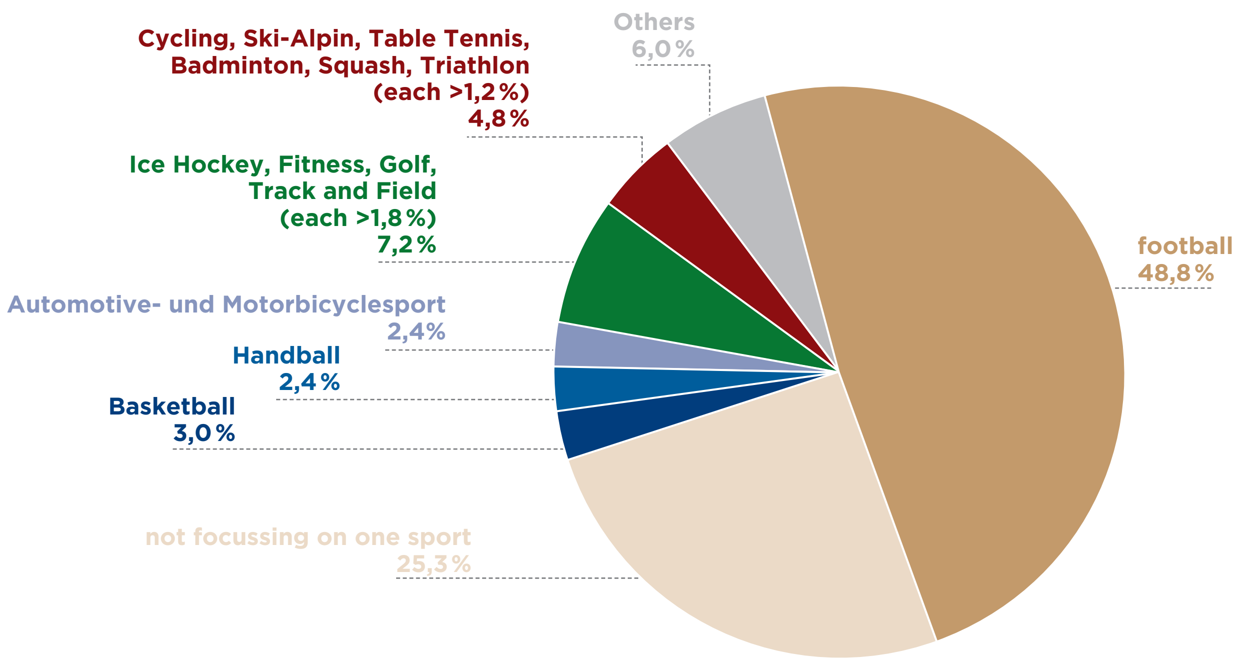
Since 1967, the Stiftung Deutsche Sporthilfe has supported young, talented athletes on their way to medals and star performances. Adapting creatively to help each athlete plan for his or her career and finances and even personality development; Sporthilfe currently supports around 4,000 athletes from more than 50 sports. Ninety percent of the athletes that represent Germany in international competitions are sponsored athletes. They have won a combined 261 gold medals at the Olympic Games and nearly 350 gold medals at the Paralympics.

[16]Goldberg, L. R. (1993). The structure of phenotypic personality traits. American Psychologist, 48(1), 26.

THE INDUSTRY REPRESENTATIVES (PART I)

PRIMARY SPORT

FIGURE 9



SUBSECTORS

FIGURE 10

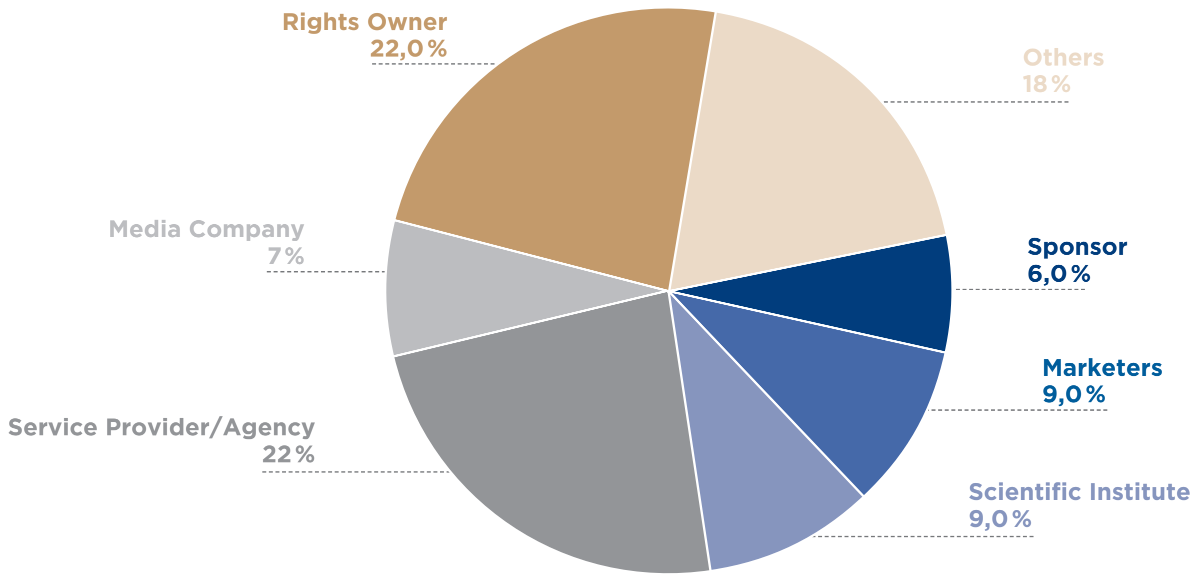


FIGURE 11

AMOUNT OF EMPLOYEES IN THE COMPANY

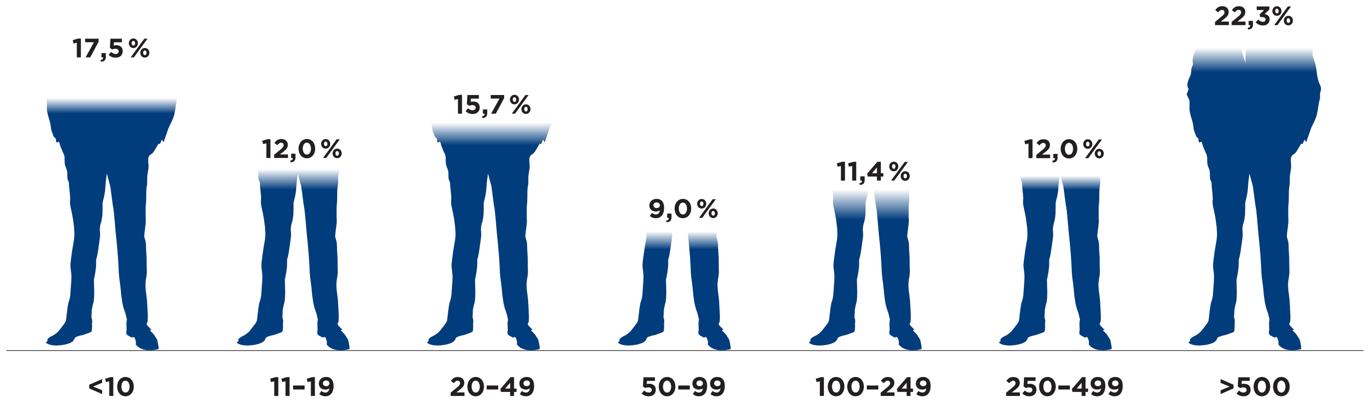
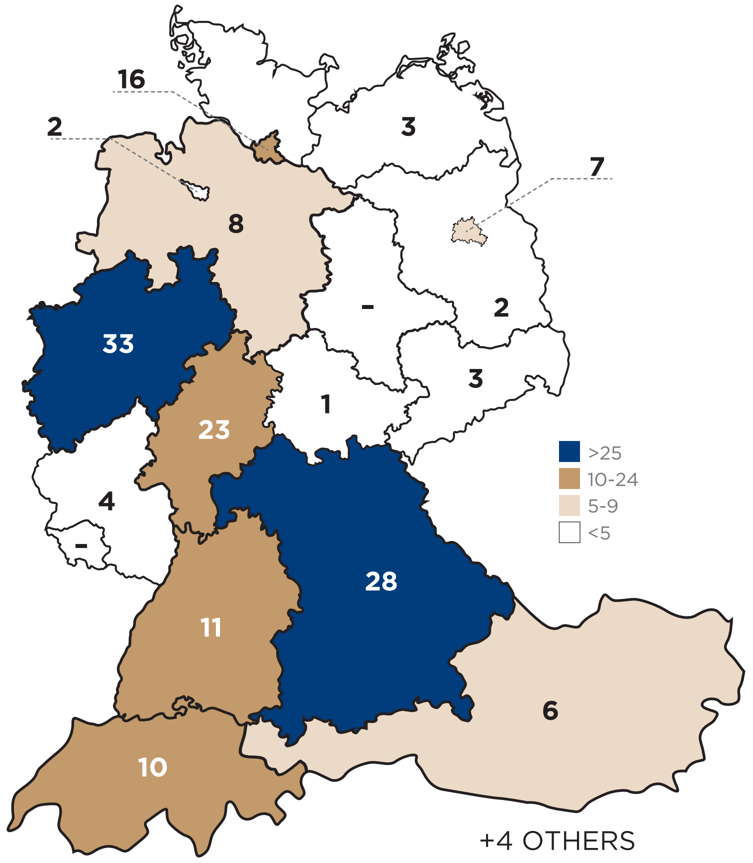


FIGURE 12

GEOGRAPHIC DISPERSION



THE INDUSTRY REPRESENTATIVES (PART II)

POSITION OF THE RESPONDENTS IN THE ORGANIZATION

FIGURE 13

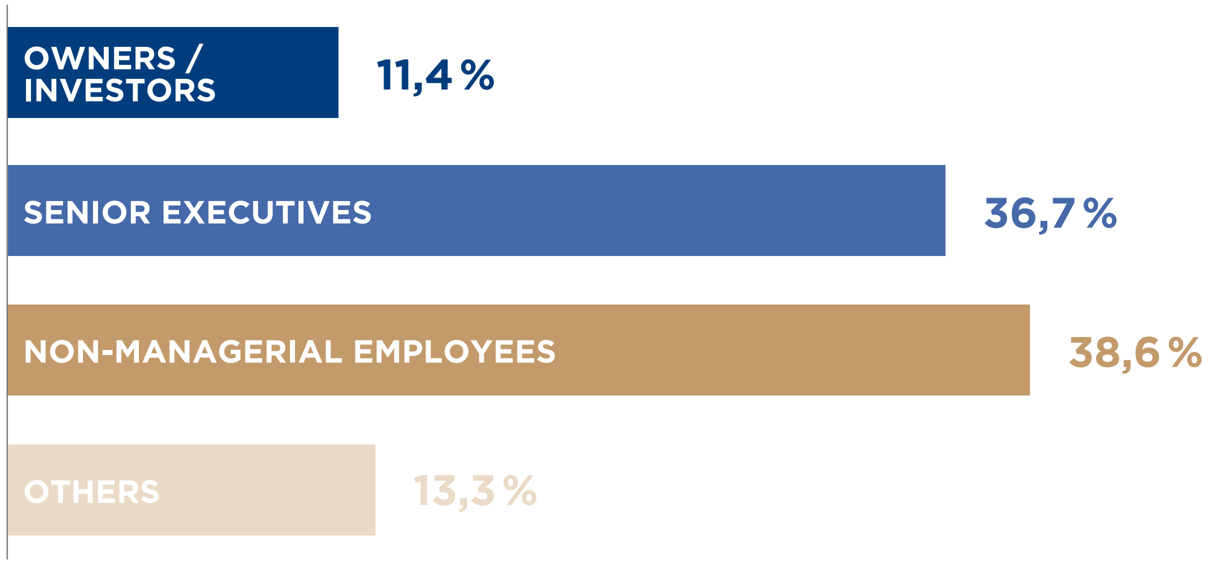


Photo: iStock Photo

Deutsche Sporthilfe

SAMPLE

The sample of respondents to the SPOAC Sportbusiness Study 2018, centered on decision-makers and managers, represents a valid cross-section of the sports business sector in the DACH region (Figures 9-12).

This year, roughly half of the respondents are employed in organisations that focus on football, which confirms the importance of the sport in the DACH region. A quarter of the respondents represent organisations without a focus on a particular sport. The remaining quarter focus on a variety of sports.

The two largest sub-sections within the sample surveyed are service providers and agencies at 30% (35.7% in the previous year) and rights holders such as clubs or associations with 22% (24.8%) of the respondents.

One-third of the respondents work for organisations with less than 20 employees (29.5%); they are examples of the many start-ups, sole proprietorships, and boutique agencies that drive and shape the growth of the sports business sector. The number of respondents from companies with 50 to 299 employees declined, with one in five respondents now working in an organisation with more than 500 employees (compared with about one in seven in the previous year).

This year, as in the previous year, the majority of survey participants came from North Rhine-Westphalia, Bavaria, and Hesse. More than one third of the respondents are executives (36.7% compared to 33.8% in the previous year). The proportion of owners and investors is 11.4% (compared with 19% in the previous year). A further 38.6% of those surveyed represent non-executive employees; about one in eight could or did not want to assign themselves to any of these categories. Based on the distribution and representativeness of respondents, the present study provides meaningful guidance and predictions of the future of the industry.

SPOAC BY WHU

Photo: Falco Peters

SPOAC BY WHU

In order to prepare future executives and players of high potential from other business sectors for the future challenges in the sports business, SPONSOR^{S}, the leading German-language information service provider in the sports business, and WHU - Otto Beisheim School of Management, one of the most renowned business schools in Europe, founded the SPOAC - Sports Business Academy by WHU in 2015.

The SPOAC combines the expertise of two leading organizations in their respective fields. In addition, the SPOAC cooperates closely with leading institutions from sport, media and business, who contribute their expert knowledge to the training and further education offerings. Since its foundation, over 200 participants have completed SPOAC programs, ranging from multi-day and topic-specific excellence programs to a 1.5-year WHU Part-Time MBA Sports Business Track. The General Management Program in Sports Business is the flagship program of the SPOAC and can be completed within one or two years, depending on availability.

The SPOAC‘s unique learning concept is centered on the case study method in a small group setting. Participants benefit from the support of lecturers, proven experts in their respective fields, and decision-makers in the sports business sector, with whom they have direct access for exchange. **www.spoac.com**

SPONSOR^{S}

SPONSOR^{S} is the leading German-language information service provider in the sports business.

Since its founding in 1996, SPONSOR^{S} has offered a comprehensive range of information and platforms where market participants can interact with one another. With its brands SPONSOR^{S} („Content“), SPOBIS („Live“) and SPOAC („Education“), the company is a leader in the fields of information offerings, events, and training.

SPONSOR^{S} ONLINE, regarded as an indispensable news and service platform for the entire industry, offers exclusive daily news, in-depth analyses, and a business clipping on all industry-relevant topics. SPONSOR^{S} Search contains information and data at the click of a mouse and the SPONSOR^{S} Newsletter provides daily information on relevant events. The monthly SPONSOR^{S} MAGAZINE bundles the most important information and provides decision-makers in the sports business scene with a comprehensive overview of important developments in various sectors of the industry. In addition, SPONSOR^{S} publishes reports, studies, and specials on various topics related to the sports business.

The annual SPONSOR^{S} congresses cover all areas relevant to the industry, some of which are leaders in their field in Europe. The current summits (SPOBIS - SPONSOR^{S} Business Summit / SPOBIS Gaming & Media) attract more than 300 speakers and 4000 participants from Germany and abroad every year. **www.sponsors.de**

WHU – OTTO BEISHEIM SCHOOL OF MANAGEMENT

WHU - Otto Beisheim School of Management is an internationally oriented, privately financed business school. Founded in 1984, the Business School is now one of the most renowned German business schools and enjoys an excellent international reputation. In Düsseldorf, the university opened its second campus in October 2012. The Center for Sports and Management (CSM) and its chair have been located at the Düsseldorf campus since 2014. CSM is active in teaching and research as well as in collaboration with partners and sponsors in business practice. Under the direction of Prof. Dr. Sascha L. Schmidt, the CSM has focused its research on the future of professional sports and the influence of new technologies on business models in sport. To ensure the greatest possible practical relevance, great care and focus is placed on translating current research results into teachable cases. **csm.whu.edu**

AUTHORS

Prof. Dr. Sascha L. Schmidt

Sascha L. Schmidt is a professor and the head of the Center for Sports and Management (CSM) at WHU - Otto Beisheim School of Management in Düsseldorf. He is also the academic director of the SPOAC and affiliate professor at the Laboratory for Innovation Science at Harvard (LISH) at Harvard University in Boston/USA. Schmidt is dedicated to the „future of sport", one of his key research areas. He studied, earned his doctorate, and habilitated at the Universities of Essen, Zurich, St. Gallen, the EBS University in Oestrich-Winkel, and at the Harvard Business School in Boston. He also worked as a strategy consultant for McKinsey and for himself as an entrepreneur.

sascha.schmidt@whu.edu
@ProfSLS

Daniel Beiderbeck

Daniel Beiderbeck is a PhD student at the Center for Sports and Management (CSM) at WHU - Otto Beisheim School of Management and Program Manager at the SPOAC. Beiderbeck's research focuses on Delphi studies to investigate future scenarios for football and eSport. Prior to his doctorate, Daniel studied industrial engineering at the RWTH Aachen, Harvard University, and the University of Cambridge. He also worked for two years as a strategy consultant at McKinsey & Company, where he supported numerous digital transformation projects in various industries.

daniel.beiderbeck@whu.edu

Nicolas Frevel

Nicolas Frevel is a PhD student at the Center for Sports and Management (CSM) at WHU - Otto Beisheim School of Management. He conducts research on topics in the field of „The Future of Sports" with the help of Delphi-based scenario analyses. His focus is on football and technologies in sport. Before his doctorate, he worked as a consultant at McKinsey & Company in various industries and functions. He studied management at the University of Mannheim, Trinity College Dublin, and Queen's University in Canada.

nicolas.frevel@whu.edu

Photo: istockphoto.com ©OJO_Images

STRONG INDUSTRY PARTNERS

The SPOAC - Sports Business Academy currently cooperates with DFL, DFB, DOSB, WWP, Nielsen Sports and Microsoft, which are among the leading institutions and companies in the sports business. The cooperation strengthens the interlinking of science and practice and ensures an education and training program that is tailored to the needs of the market. The participants also have unique access to decision-makers in the sports business. In addition, the partners use SPOAC to train and develop their own employees and as an important recruiting platform for gaining new qualified talents.

SPORTS BUSINESS ACADEMY

BY WHU

SPOAC – Sports Business Academy

SPONSOR[S] Verlags GmbH
Theodorstr. 42–90, Haus 11
22761 Hamburg

Fon: 040/41 33 00 858
Mail: study@spoac.com

www.spoac.com