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6. Материалы «XVI Международного банковского конгресса: «Банки: капитализация, устойчивость, конкурентоспособность» [Электронный ресурс]/Выступление Трофимовой Е. В., компания «Standard & Poor's»//Режим доступа <http://mbk.spb.ru/rus/mbk2007/workshop3.htm> (дата обращения: 15.07.2013)
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Prospects of development of sports industry as a separate branch of economy

Despite the turbulent times that are for the world economy sports industry continues to grow and evolve, with the ever popular are the major competitions. With regard to the smaller events, the organizers have to make more efforts to obtain financial support. Sports industry continues to face difficulties, both financial and commercial nature. Many of them are associated with the effects of economic instability and cautious consumer behaviour — factors affecting all industry interacting with consumers.

Transnational audit company PricewaterhouseCoopers (PwC) presented the second edition of the global sports market called “Changing the Game. Outlook for the Global Sports Market to 2015”, which provides revenue forecasts at the global and regional levels in the period from 2011 to 2015, as well as data on four key market segments. The authors stress that despite the unstable economic climate, the sports industry continues to thrive, and major sports events are popular today as ever¹.

In 2010, the income of the global sports industry amounted to 121,4 billion dollars. This year has been very profitable thanks to the FIFA world Cup in South Africa. In the next five years, with compound annual growth (CAG) will be 3,7%, by 2015, the global revenue will reach 145,3 billion dollars. If exclude from the analysis of the major events of the world level, the average annual growth rate worldwide amounted to 4,7%. Despite the slow growth in EMEA for its parameters (4,6%) is as close to a world growth rate (4,7%) growth rates in North America, which also accounted for 4,7%. The highest rates remained for Latin America — 5,6%.

Income from ticket sales. According to experts, the income from ticket sales worldwide врасут from 39,6 billion dollars in 2010 to 44,7 billion dollars in 2015, which is comparable with total annual growth rate of 2,5%. Excluding the impact of major events, rates of growth in regular competitions will be somewhat higher — 2,7% year on year.

The share of the income from ticket sales accounted for 32,6% of the total proceeds of the sports industry. The share of North America and EMEA countries account for 82% of total revenues from ticket sales. At the same time it should be noted that income from ticket sales is formed by a segment of the market, growth rates of which will be the most low among all other segments of the sports market: its CAG will average only 2,5%. EMEA grow even slower if to speak about a comprehensive index. This is partly explained by fluctuations in connection with the holding of major sporting events: in 2012 and 2014, there will be marked peak values².

Sponsorship. Under forecasts of experts, the global volume of revenues from sponsorship of sports teams and the competition will increase from 35 billion dollars in 2010, up 45,3 billion dollars in 2015, i. e. with compound annual growth of 5,3%. If we exclude from the analysis of major sporting events, the average cumulative rate of annual growth of income from sponsorship regular competitions 6,4%.

The sponsorship accounting for 28,8% of all incomes of the sports market, so your sponsorship will be the main factor of revenue growth in this period the average global growth in this component market 5,3%. In each region the rates of growth will

¹ Прогноз PricewaterhouseCoopers: перспективы развития мировой индустрии спорта с 2011 по 2015 год//Центр гуманитарных технологий. Экспертно-аналитический портал. [The electronic resource]. – 2012. – Access mode: <http://gtmarket.ru/news/culture/2012/01/26/3952>. – Date of access: 7.10.2013.

² Меняем правила игры. Перспективы развития мировой индустрии спорта до 2015 года//Исследование PricewaterhausCoopers. [The electronic resource]. – 2011. – Access mode: http://www.pwc.ru/en_RU/ru/globalisation/assets/PwC-Global-Sports-Outlook-to-2015-ru.pdf. – Date of access: 19.10.2013.

be approximately equal: the lowest growth will be observed in the Asia-Pacific region (4,4%) and the highest (6,1%) in North America. However, if we exclude from the analysis of major sporting events and consider only the growth of the market for other competitions, sponsorship takes the second place among sources of revenue growth rates, second only to the broadcasting rights. In some regions of sponsorship is the main component of the overall income structure: for example, in Asia, with the sponsorship accounts for 43,2% of all income for the sports industry.

Sale of broadcasting rights. Experts predict that global revenue from the sale of rights to broadcast sports competitions will increase from 29,2 billion dollars in 2010, up 35,2 billion dollars in 2015, which is equivalent to the combined annual pace of growth of 3,8%. If we exclude major sporting events, with compound annual growth of incomes only from regular competitions will be much higher and will be 6,6%.

Sale of broadcasting rights is the third largest category of income (24,1% of the total market). However, it is the second growth rate for the sector (3,8%) and if we consider all kinds of sports competitions, and the first (6,6%) — if you consider only the regular sporting events. The reason is due to the timing of large sports competitions, and 2010 (initial year of the period) was very active, and by 2015 — the target year is relatively calm. The EMEA has the biggest share of the world market of broadcasting rights. In second place is North America. However, the highest growth is expected in Latin (5,6%) and North America (5,3%). Sale of broadcasting rights is the most important single source of income in Latin America (38,3% of total income).

Merchandising. Experts predict that global revenue from merchandising to increase from 17,6 billion dollars in 2010, up 20,1 billion dollars in 2015, i. e. compound annual growth will amount to 2,6%. The growth rate of revenues from merchandising associated with regular competitions, reached approximately 2,9%.

Forecasts merchandising is a very small category of income (14,5%), while in North America, it accounts for 25,2% of all revenues of the sports industry. It is therefore not surprising that North America accounts for 71% of the total market merchandising sports industry. The growth in revenues from merchandising closely related to the structure of consumer spending and the overall rate of growth is equal to the growth rate of revenues from ticket sales (2,6%). For the period up to 2015, with compound annual growth of revenues from merchandising will be the highest in Latin America (3,9%) and the Asia-Pacific region (3,3%).

Another analytical report “the Landscape of European football”¹, which is made by UEFA and was the result of a detailed analysis of 665 audited financial report of football clubs for 2010. According to this document, in 2010 the income clubs has grown by 6%, reaching a record level of 12,8 billion euro. For the period from 2006 to 2010, the growth of aggregate income of the football clubs reached 42%, while growth in the economy of European countries amounted to only 1%. However the sum total of net losses in 2010 reached a level of 1,6 billion euros.

Increased losses of UEFA pays special attention. So, starting with the season 2013/2014 come into force rules of the financial fair play, the General meaning of which is to limit the amount of loss and transition of all clubs to self-sufficiency.

Speaking of football, not to mention the annual report of Deloitte Football Money League². According to this document, the revenues of the 20 largest clubs in Europe for the 2010/2011 season amounted to 4,4 billion euros, that is 3,6 times higher than the similar indicator of the 1996/1997 season. According to another study by KPMG³, for the 2009/2010 season, leading European football clubs generated revenues of more than 11 billion dollars.

Investments in sports infrastructure not only promote development of sport as such is stimulated and the economy in General. So, according to a study by Ernst&Young⁴, FIFA world Cup will be a powerful impetus for growth in Brazil's economy. In 2010–2014 it will additionally 142,4 billion Brazilian reais. A direct impact on the economy of Brazil analytic in E&Y appreciated in 64,5 billion reais in 2010–2014 is 2,17% of GDP in 2010; the state will also get 18,13 billion reais taxes. The successful holding of the tournament and adherence to fundamental macroeconomic principles will help Brazil to become the fifth economy in the world, says E&Y.

In General, as shows the forecast revenues sports industry will grow in the period from 2011 till 2015, despite a slight decrease in revenue in 2011 — a typical downturn, which usually occurs after the rapid growth in income in the year of the world Cup. Competition is growing, and the one who will present the market the most spectacular and attractive for the audience, the proposals will be eligible for the highest income.

Today the sports industry is undergoing a period of rapid development and has a huge investment potential.

Such attention to the financial indices is quite clear testimony to the importance of the industry of sports in the framework of the entire economic system.

In the long term activities may be of interest to the business not only in terms of improving the image attractiveness, but also as a source of income.

Into force of the violent tendencies of development of the sports sector should be considered as a separate sector of the economy, first of all, from the position of state regulation.

¹ Ландшафт европейского футбола//Исследование УЕФА. [The electronic resource]. – 2012. – Access mode: http://ru.uefa.com/MultimediaFiles/Download/Tech/uefaorg/General/01/74/68/67/1746867_DOWNLOAD.pdf. – Date of access: 11.10.2013.

² Deloitte Football Money League 2012//Deloitte. Football finance. [The electronic resource]. – 2012. – Access mode: <http://www.deloitte.com/assets/Dcom-UnitedKingdom/Local%20Assets/Documents/Industries/Sports%20Business%20Group/uk-sbg-dfml-2012-final.pdf>. – Date of access: 17.10.2013.

³ Европейские стадионы – 2011. Перспективы строительства и эксплуатации футбольных стадионов в Европе//Исследование KPMG. [The electronic resource]. – 2012. – Access mode: <http://www.kpmg.com/RU/ru/IssuesAndInsights/ArticlesPublications/Documents/European-Stadium-Insight-2011-rus.pdf>. – Date of access: 20.10.2013.

⁴ Российский международный олимпийский университет займется переквалификацией чемпионов в спортивных менеджеров// Sport Business Consulting Magazine. [The electronic resource]. – 2012. – Access mode: <http://www.s-bc.ru/news/article/dbd0de1b-8e61-4169-9503-d8c2f620a5c7>. – Date of access: 17.10.2013.

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