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Selection of countries and disciplines to be analysed in more depth



Élisabeth Waelbroeck-Rocha, Eurostrategies

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Next steps of the study

- Analyse :
 - The efficiency of different business models
 - The sustainability of the « efficient » business models, given future changes such as:
 - ◆ Changes in the contribution of volunteers
 - ◆ The impact of the financial crisis on public sector budgets
 - ◆ The impact of the economic environment on sponsorship and corporate funding
 - The impact of the EU regulatory environment and of national policies with an impact on the sources of funding of grassroots sports

Scope

- Select key disciplines in a selection of Member States
 - ▶ 7-10 Member States
 - ▶ 5 disciplines: four identical in all countries selected, plus one
- Survey of clubs to collect detailed data on costs, expenditures and membership structures
- Econometric analysis aimed to identify the most efficient funding models

Definition of « efficiency »

- Measures to be used:
 - ▶ Rate of participation
 - ▶ Cost of practice for each individual
 - ▶ Rate of growth of the number of people practicing sports
- Other measures of efficiency will be considered where possible:
 - ▶ Social efficiency
 - Impact of different funding models on age distribution of members and / or on cost per member
 - ▶ Multiplier effect of public financing
 - Conditionality of different financing schemes
 - ▶ Indirect effects on other budget items
 - Health, incidence of certain pathologies, quality of life of aged people, etc.

Data needed (with historical perspective)

- Number of members, and main characteristics of members
 - ▶ Age structure, gender, income range, etc.
- Annual fee per member
- Equipment available
- Number of coaches and other management
- Status of personnel
- Total budget
- Budget structure (revenue and expenditures)
- Existing solidarity mechanisms
- Etc...

Selection of countries and disciplines: two relevant dimensions need to be considered

- The characteristics of the country:
 - ▶ GDP per capita (level of economic development)
 - ▶ Administrative organisation (level of decentralisation, organisation of sport' practice, economic model for sports)
 - ▶ Cultural factors
 - ▶ Budget situation
- The specificities of the different disciplines:
 - ▶ Sport' dimension
 - ▶ Social aspects
 - ▶ Economic dimension
 - ▶ Environmental dimension

The typology of funding schemes and business models will have to be refined taking into account those two dimensions

Selection criteria for the disciplines to be studied in-depth : the sport' dimension

- Sport' dimension
 - ▶ Popularity of practice
 - ▶ Collective or individual sport
 - ▶ Gender
 - ▶ Age range
 - ▶ Indoor / outdoor sport
 - ▶ Affiliation rate

Selection criteria for the disciplines to be studied in-depth : the social dimension

● Social dimension

- ▶ Attractiveness for new participants : young people, disabled, seniors, obese people
- ▶ Social function, incl. social inclusion
- ▶ Externalities : welfare, health, etc.

Selection criteria for the disciplines to be studied in-depth : the economic dimension

● Economic dimension

- ▶ Diversified sources of funding
- ▶ Cost of the practice for the individual (annual fee + equipment)
- ▶ Technical access to the practice
- ▶ Need for heavy facilities, and/or for sophisticated equipment
- ▶ Existence of solidarity systems
- ▶ Sports for which there are « betting » systems

Selection criteria for the disciplines to be studied in-depth : the environmental dimension

- Two environmental dimensions
 - ▶ Environmental impact of sporting activities
 - ▶ Impact of environmental degradation on sports' practice

A wide diversity of disciplines, with « national » specificities

43 disciplines in the top 5 or top 10, in 20 Member States

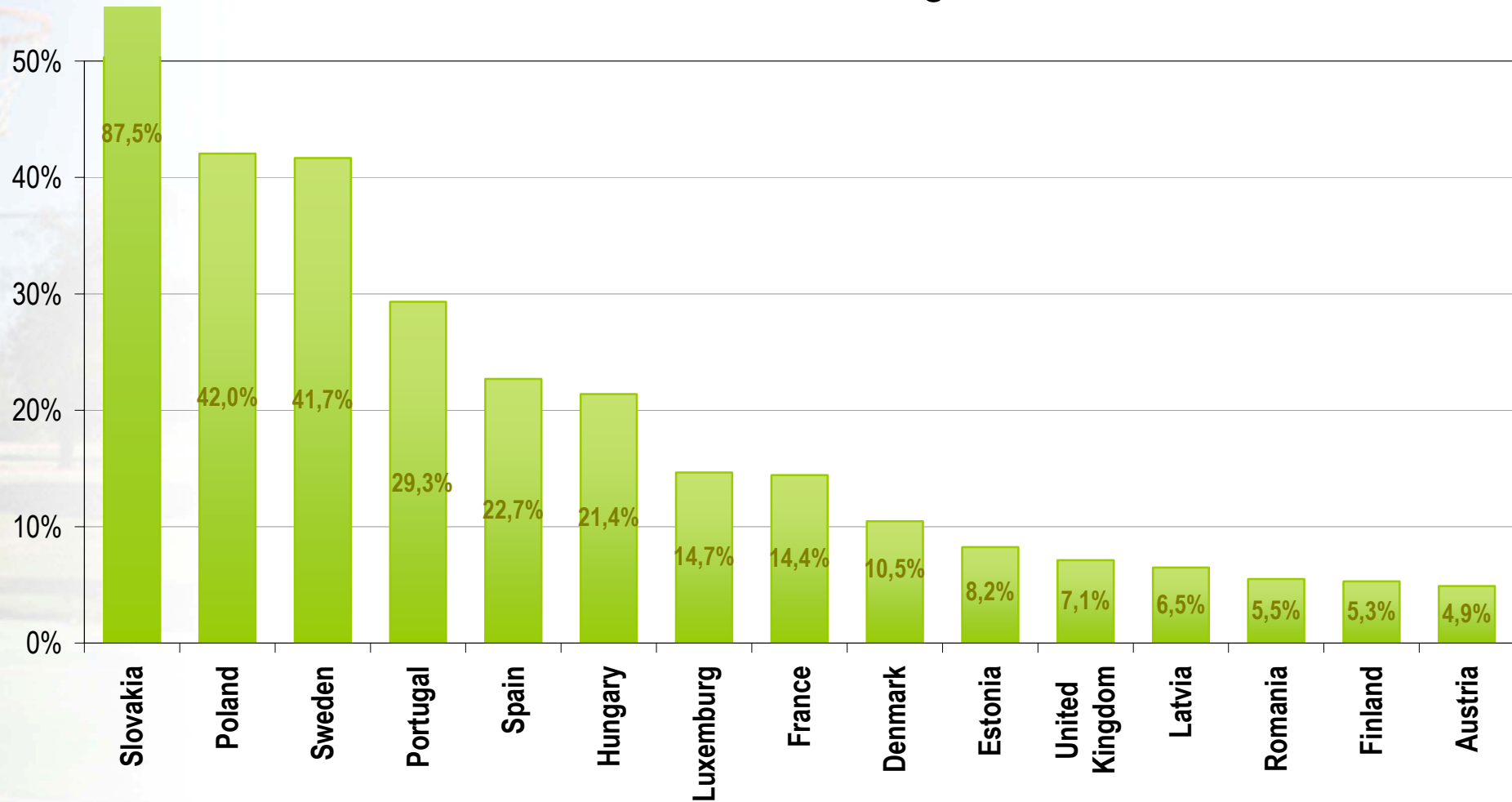
	AU	DK	ES	FN	FR	DE	HG	IRE	IT	LA	LI	LX	NL	POL	POR	RO	SLO	SP	SW	UK
"Pétanque"					8															
Badminton		6																		7
Basketball			3		5		3		3	3	1	2		3	3	3	2	2		
Bowling	3																			
Bowls																				4
Boxing											9									
Chess																	7			
Cricket																				8
Cross country skiing			9																	
Equestrian Sports	4	7			3								5						5	
Fishing									4			9						8		
Floorball				2																
Football	1	1	1	5	1	1	1	1	1	1	2	1	1	1	1	2	1	10	1	2
Gaelic football								3												
Golf	2	2			5			4					4		6			3	2	1
Grass hockey																	9			
Gymnastics		5	2	4		2						7	3						4	
Handball	5	4			7		2				5	10			2	6	8	7		
Hockey																	7			
Ice-hockey				1																
Indoor football																	6			
Judo			9		4				9		6			4	9	9		5		
Kick-boxing							5													
Martial Arts												8				8				
Motorcycling									7											
Mountain and climbing																		4		
Orienteering																	10			
Pigeon breeding															5					
Quilles												5								
Roller Skating															10					
Rugby					9			2												5
Sailing		9												2						
Shooting		10				4						3							1	
Sportive Dancing																	4			
Squash & racketball																				10
Swimming		3	5		10		4				4									6
Table Tennis											8	4					3			
Tennis		8	7		2	3			5	5		6	2		9	1		6		3
Track & Field			4			5			6	2	3			5	7	10		9	3	9
Volleyball			6	3					2	4	7				4		4			
Winter sports									8											
Wrestling			10						10		10					5				
Yoga																	5			

The most « popular » sports at EU level

- Football (20 countries out of 20)
- Basketball, Tennis (12 countries)
- Track & field (11 countries)
- Handball (10 countries)
- Golf (9 countries)
- Judo (8 countries)
- Gymnastics (7 countries)

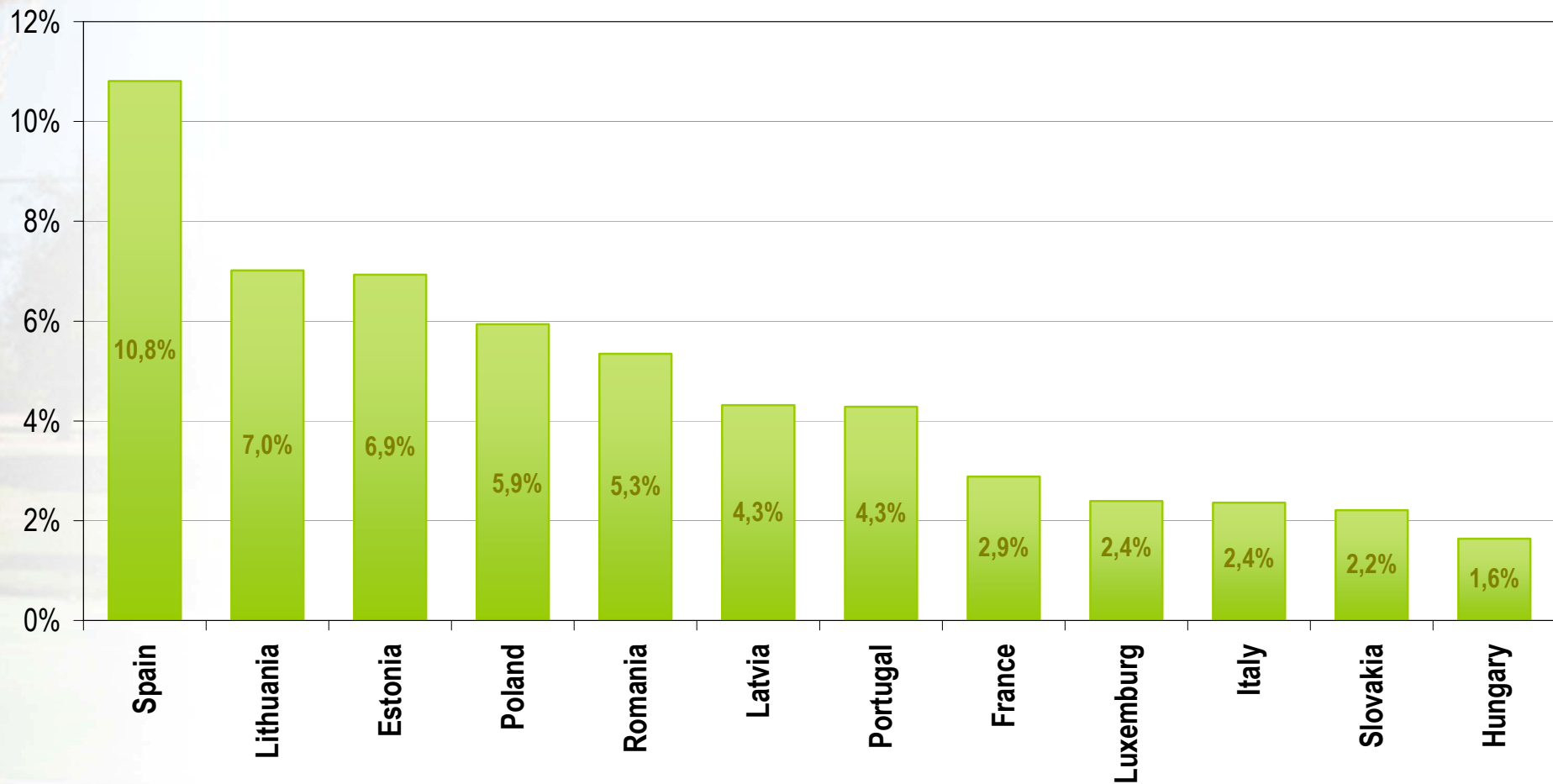
Football : rate of practice

Share of members of a federation registered in football



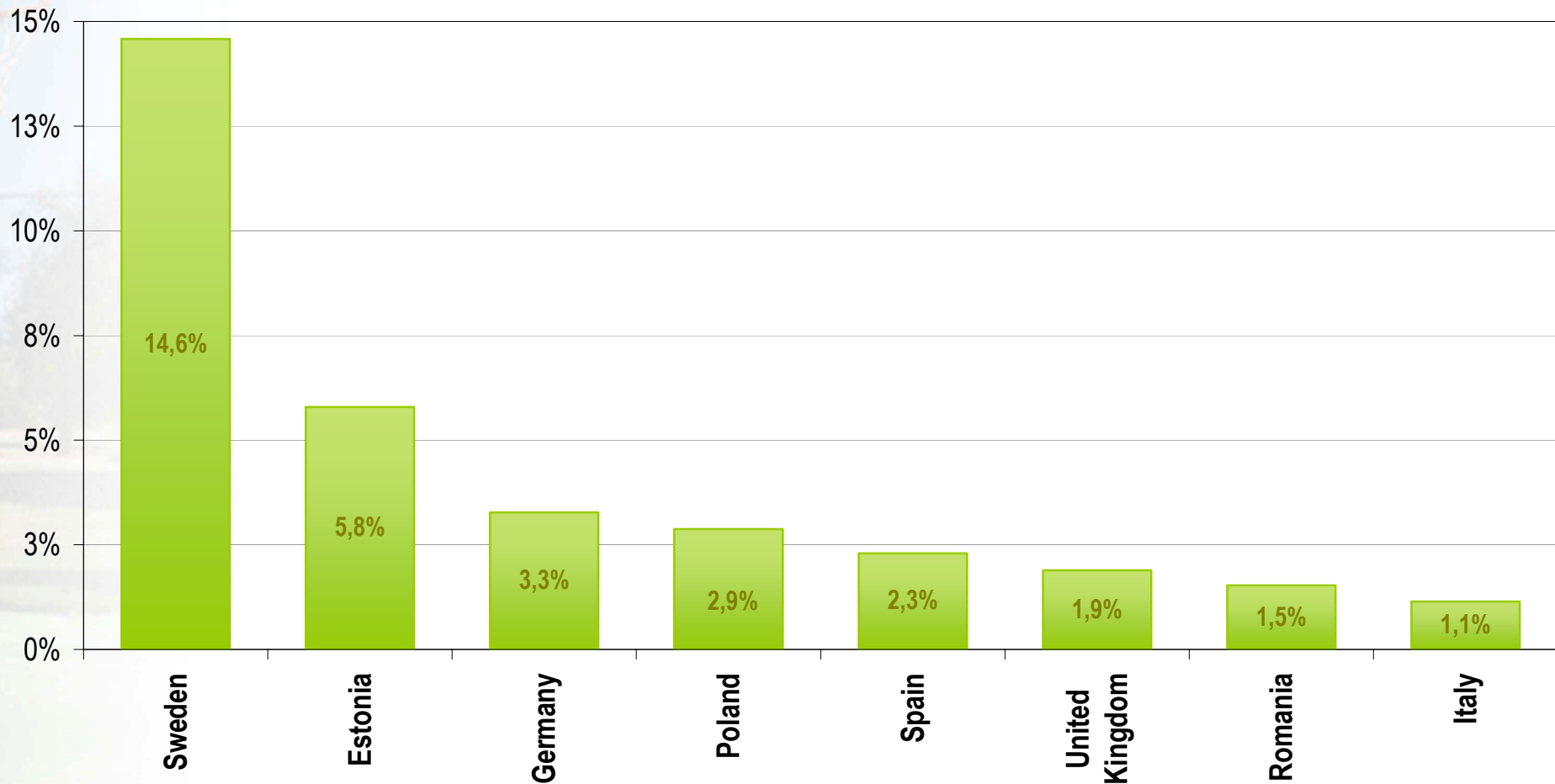
Basketball : rate of practice

Share of members of a federation registered in basketball



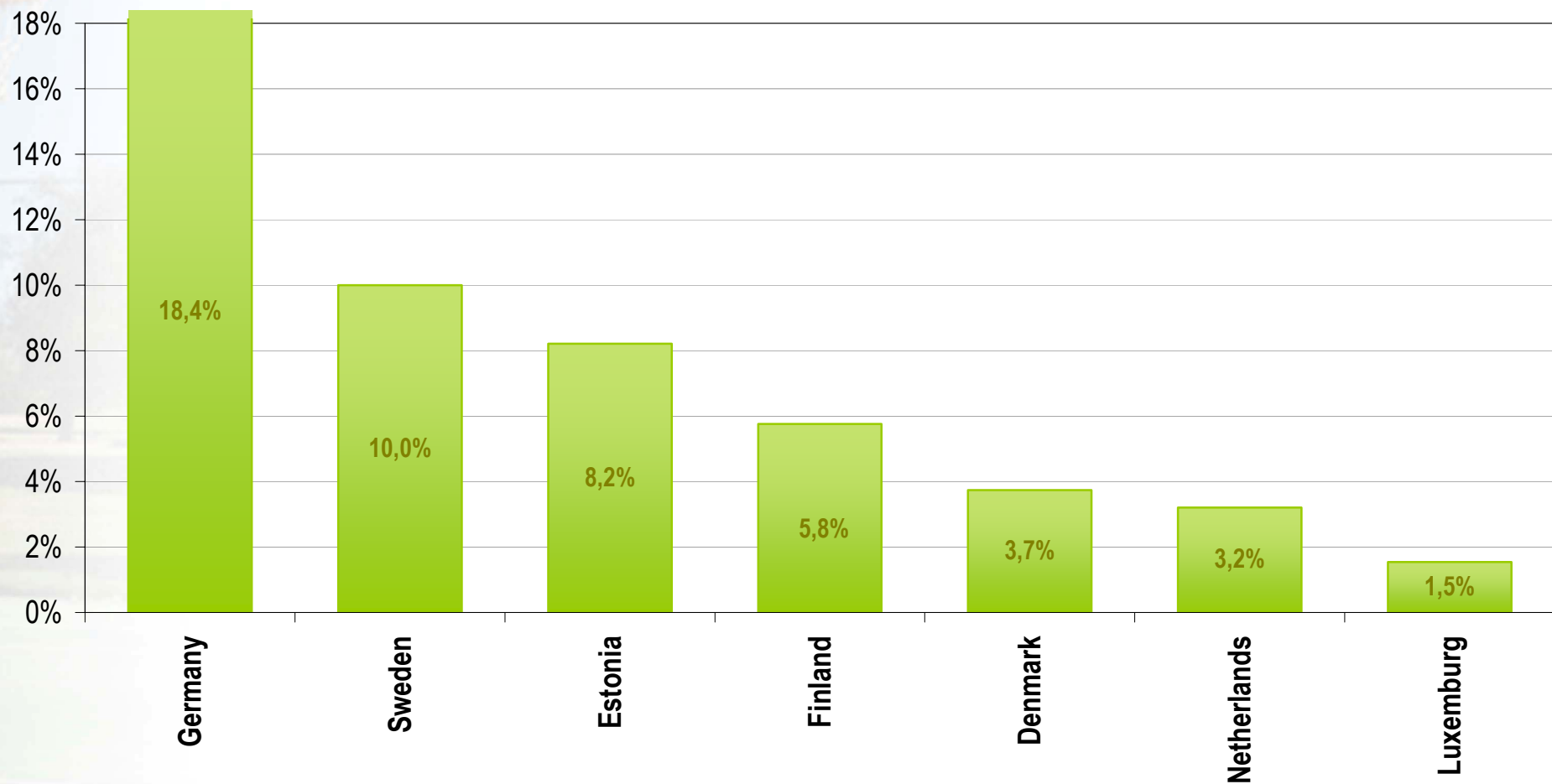
Track & Field : rate of practice

Share of members of a federation registered in track & field



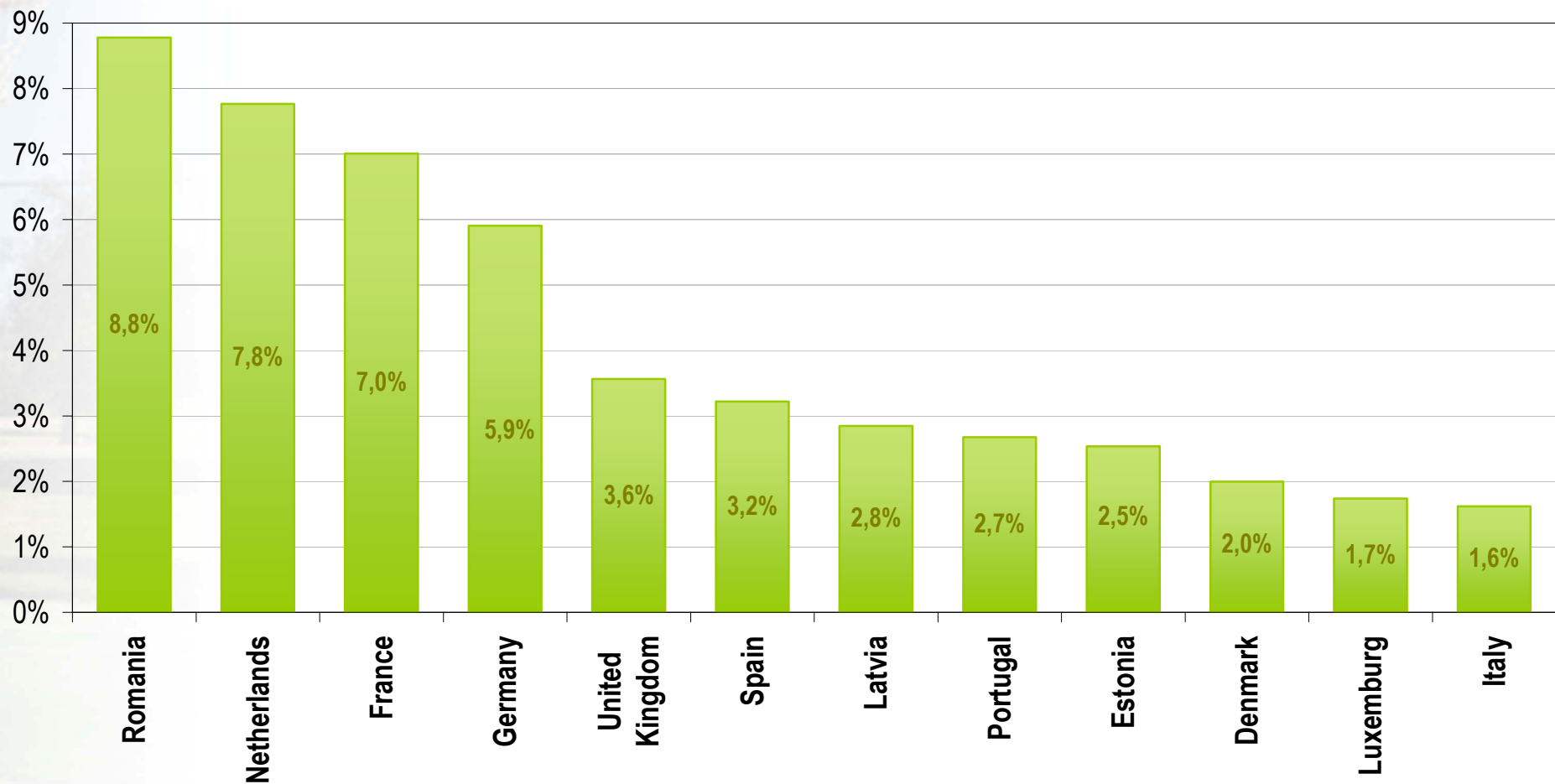
Gymnastics : rate of practice

Share of members of a federation registered in gymnastics



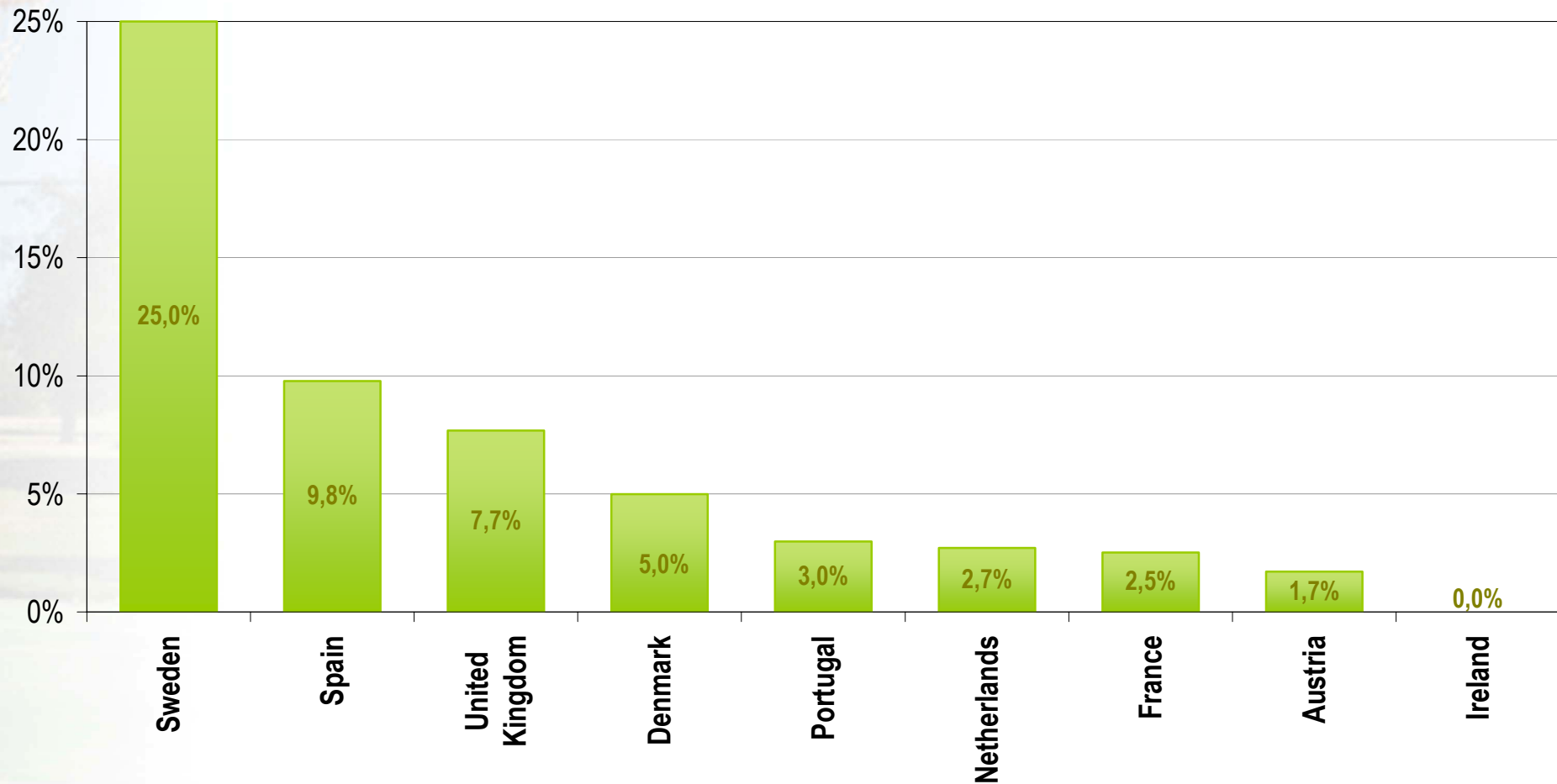
Tennis : rate of practice

Share of members of a federation registered in tennis



Golf : rate of practice

Share of members of a federation registered in golf



The key features of different sports

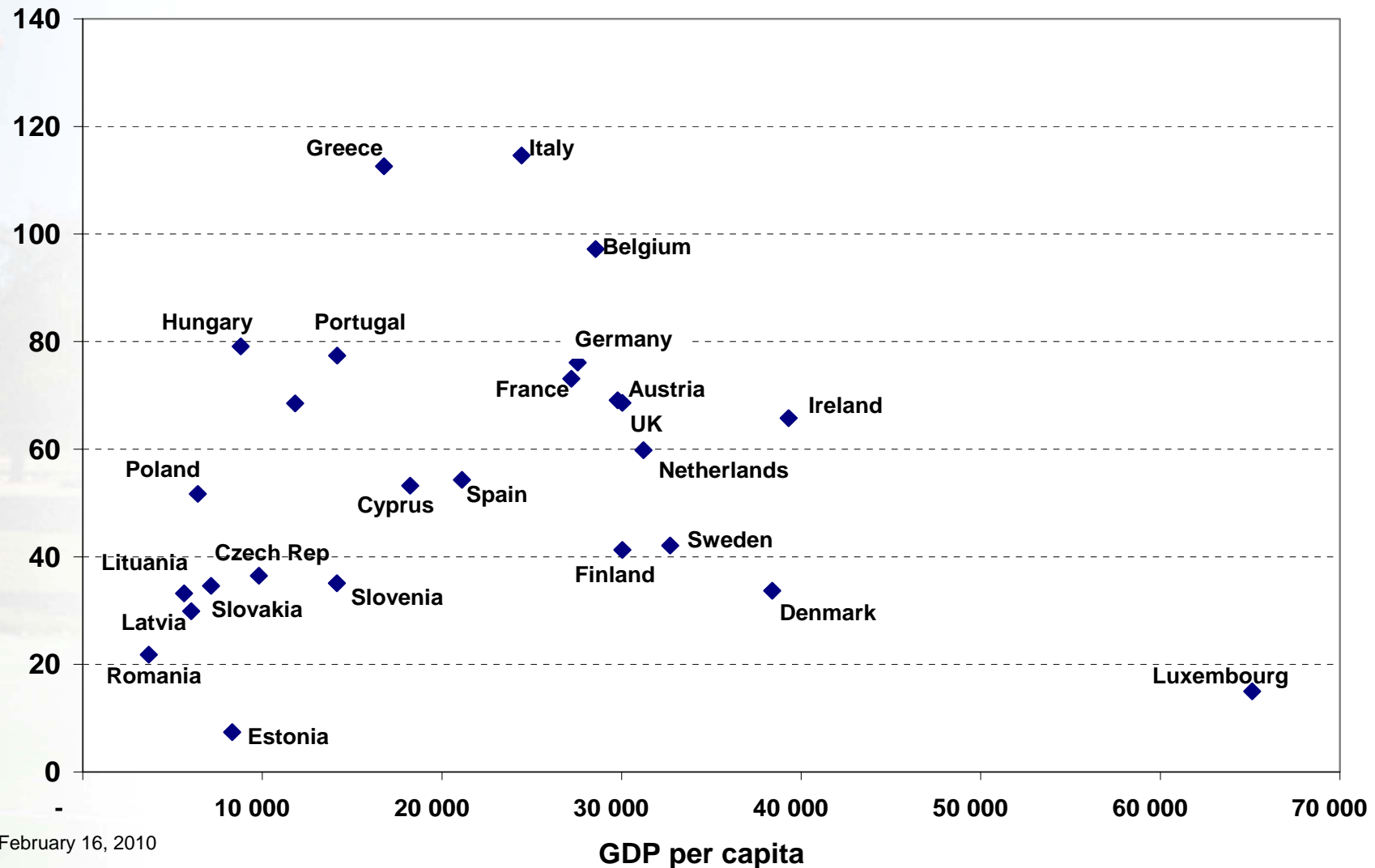
	Membership rate	General practice rate	Cost of the practice	Social utility	Characteristics of practitioners	Characteristics of the sport
Football	*****	*****	**	***	**	C
Basketball	****	***	**	***	***	C
Tennis	****	***	***	**	**	I
Track & Field	***	*****	*	****	***	I
Handball	***	***	**	***	**	C
Golf	**	*	****	***	**	I
Judo	**	*	*	***	**	I
Gymnastics	***	*****	*	****	*****	I
Swimming	***	*****	****	*****	*****	I
Sailing	**	*	*****	**	**	I
Cross country skiing	***	***	**	***	**	I
Cycling	***	****	**	****	***	I

The grouping of countries

- Group 1: the Northern European model
 - ▶ Denmark, Finland, Sweden, Germany, The Netherlands
- Group 2: the Southern European model
 - ▶ Italy, Portugal, Spain
- Group 3: the Eastern countries' model
 - ▶ Estonia, Latvia, Lithuania, Poland, etc.
- Specific country models
 - ▶ Czech Republic, France, UK

GDP per capita and public deficit situation

Public debt as a % of GDP

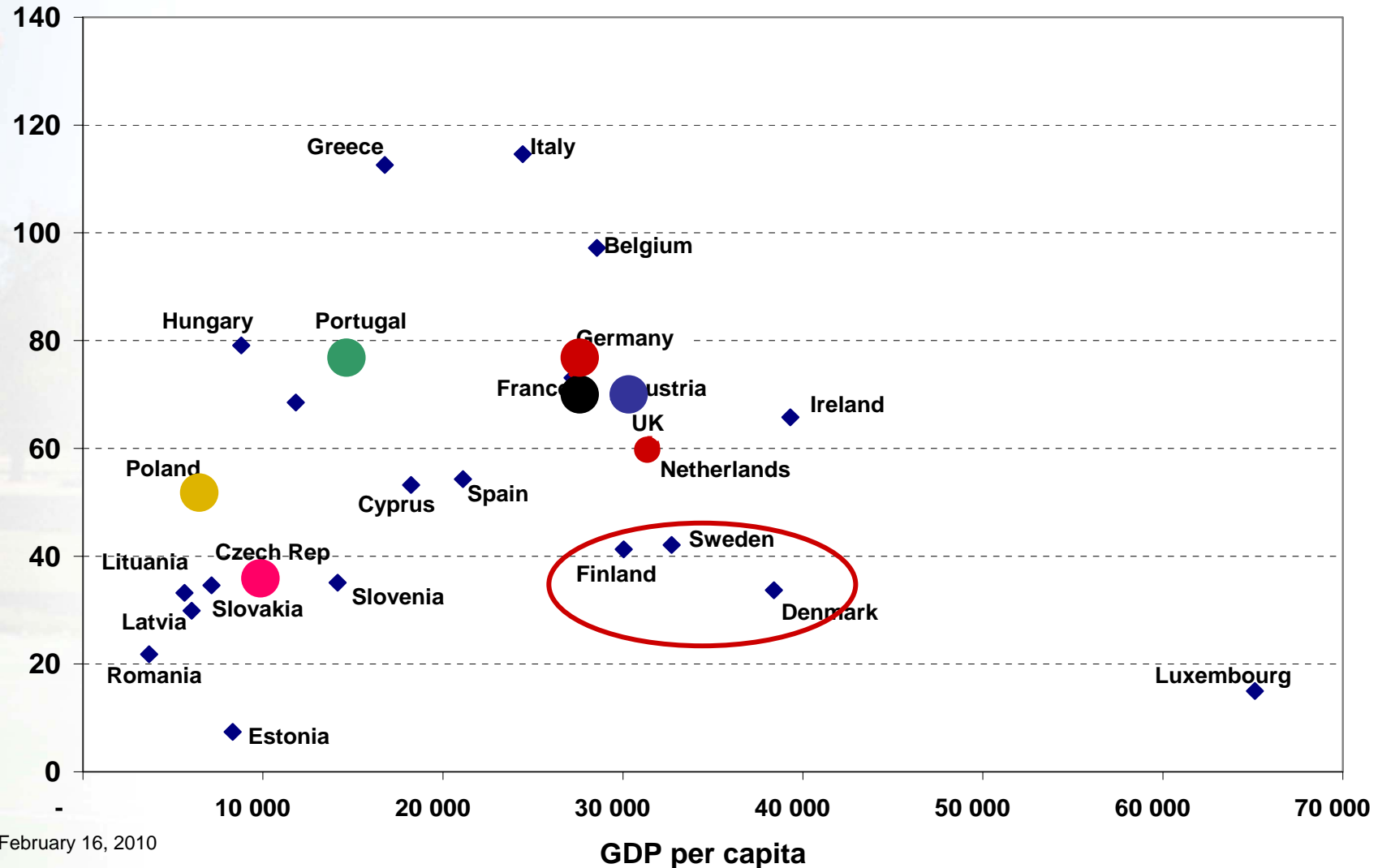


Countries proposed

Models	Proposal
Group 1	A scandinavian country Germany The Netherlands
Group 2	Portugal
Group 3	Poland
Specific cases	United Kingdom
	France
	Czech Republic

GDP per capita and public deficit situation

Public debt as a % of GDP



Two collective sport disciplines

	Membership rate	General practice rate	Cost of the practice	Social utility	Characteristics of practitioners	Characteristics of the sport
Football	*****	*****	**	***	**	C
Basketball	****	***	**	***	***	C
Tennis	****	***	***	**	**	I
Track & Field	***	*****	*	****	***	I
Handball	***	***	**	***	**	C
Golf	**	*	****	***	**	I
Judo	**	*	*	***	**	I
Gymnastics	***	*****	*	****	*****	I
Swimming	***	*****	****	*****	*****	I
Sailing	**	*	*****	**	**	I
Cross country skiing	***	***	**	***	**	I
Cycling	***	****	**	****	***	I

Two individual disciplines

	Membership rate	General practice rate	Cost of the practice	Social utility	Characteristics of practitioners	Characteristics of the sport
Football	*****	*****	**	***	**	C
Basketball	****	***	**	***	***	C
Tennis	****	***	***	**	**	I
Track & Field	***	*****	*	****	***	I
Handball	***	***	**	***	**	C
Golf	**	*	****	***	**	I
Judo	**	*	*	***	**	I
Gymnastics	***	*****	*	****	*****	I
Swimming	***	*****	****	*****	*****	I
Sailing	**	*	*****	**	**	I
Cross country skiing	***	***	**	***	**	I
Cycling	***	****	**	****	***	I

Three additional disciplines for country groupings

	Membership rate	General practice rate	Cost of the practice	Social utility	Characteristics of practitioners	Characteristics of the sport
Football	*****	*****	**	***	**	C
Basketball	****	***	**	***	***	C
Tennis	****	***	***	*	**	I
Track & Field	***	*****	*	****	***	I
Handball	***	***	**	***	**	C
Golf	**	*	****	***	**	I
Judo	**	*	*	***	**	I
Gymnastics	***	*****	*	****	*****	I
Swimming	***	*****	****	*****	*****	I
Sailing	**	*	*****	**	**	I
Cross country skiing	***	***	**	***	**	I
Cycling	***	****	**	****	***	I

In total, seven disciplines would be analysed, in 8 countries

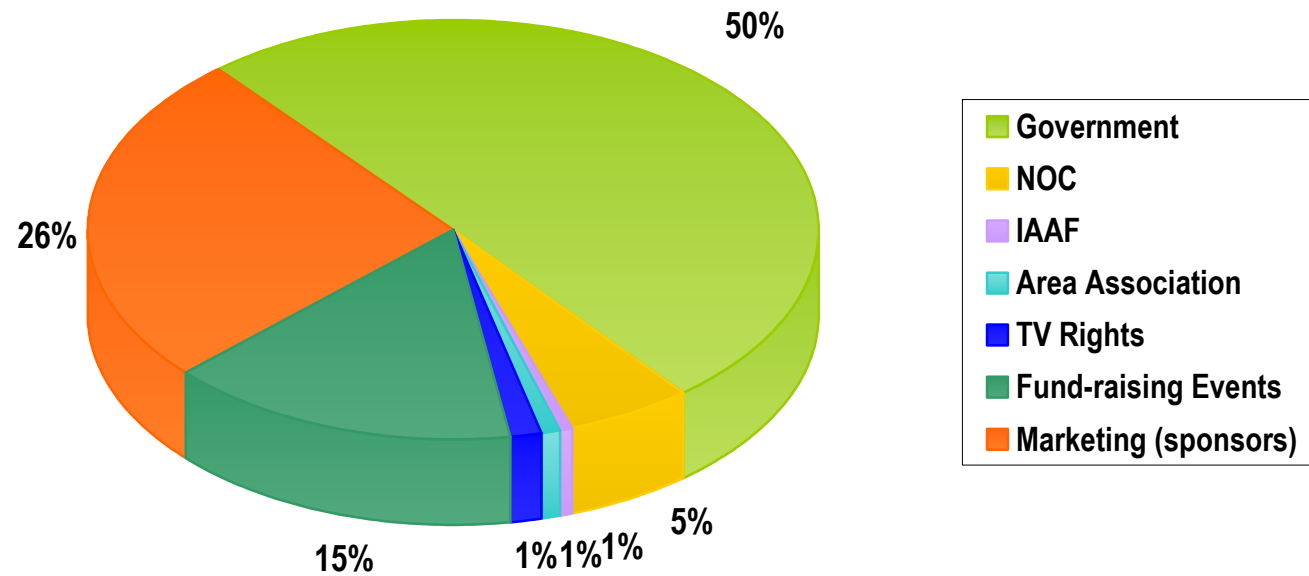
	Membership rate	General practice rate	Cost of the practice	Social utility	Characteristics of practitioners	Characteristics of the sport
Football	*****	*****	**	***	**	C
Basketball	****	***	**	***	***	C
Tennis	****	***	***	**	**	I
Track & Field	***	*****	*	****	***	I
Handball	***	***	**	***	**	C
Golf	**	*	****	***	**	I
Judo	**	*	*	***	**	I
Gymnastics	***	*****	*	****	*****	I
Swimming	***	*****	****	*****	*****	I
Sailing	**	*	*****	**	**	I
Cross country skiing	***	***	**	***	**	I
Cycling	***	****	**	****	***	I

Country and discipline selection: proposal

- In all countries selected:
 - ▶ Football, Basketball, Track & Field, Gymnastics
- In Denmark, Poland
 - ▶ Swimming
- In France, Germany, the Netherlands, Czech Republic
 - ▶ Tennis
- In Portugal, UK
 - ▶ Golf

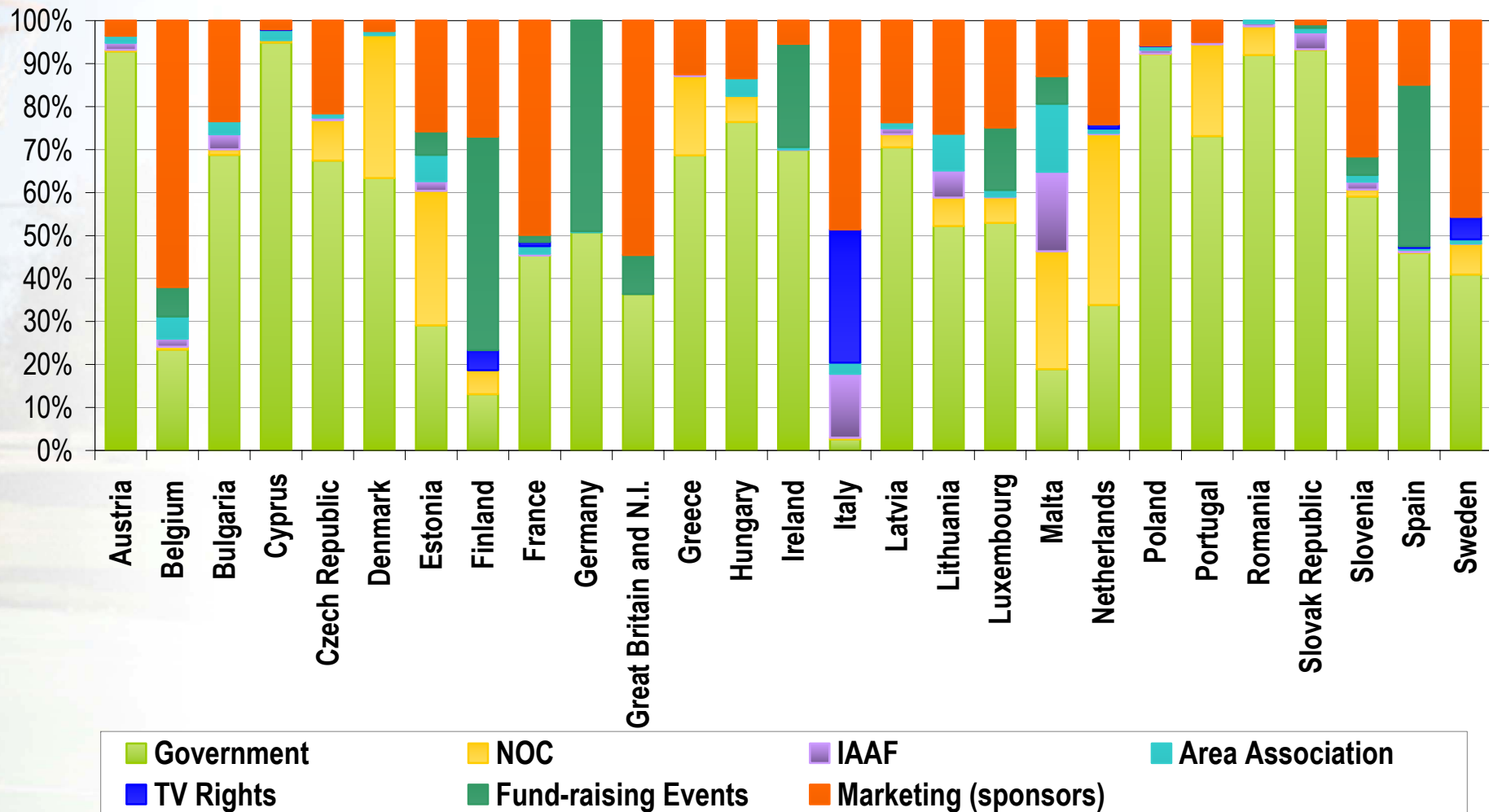
A focus on track & field

The key sources of revenue for Track & Field



A focus on track & field : key funding sources by country

Breakdown of T&F revenue per country and main source of funding





Thank You