

EUROPEAN FOOTBALL BENCHMARK | REPORT



The big 5 leagues 2018: clubs, sponsors, fans

Statista European Football Benchmark – Report

November 2018

"The thing about football
– the important thing about football
– is that it is not just about football."

Terry Pratchett

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The European Football Benchmark includes data on all 110 clubs of the 5 big European leagues¹

Introduction & methodology – club overview
















Premier League (England)

-  AFC Bournemouth
-  Arsenal F.C.
-  Brighton & Hove Albion
-  Burnley F.C.
-  Cardiff City
-  Chelsea F.C.
-  Crystal Palace
-  Everton F.C.
-  Fulham F.C.
-  Huddersfield Town
-  Leicester City
-  Liverpool F.C.
-  Manchester City
-  Manchester United
-  Newcastle United
-  Southampton F.C.
-  Stoke City
-  Swansea City
-  Tottenham Hotspur
-  Watford F.C.
-  West Bromwich Albion
-  West Ham United
-  Wolverhampton Wanderers

Bundesliga (Germany)

-  1. FC Köln
-  1. FC Nürnberg
-  1. FSV Mainz 05
-  Bayer 04 Leverkusen
-  Borussia Dortmund
-  Borussia Mönchengladbach
-  Eintracht Frankfurt
-  FC Augsburg
-  FC Bayern München
-  FC Schalke 04
-  Fortuna Düsseldorf
-  Hamburger SV
-  Hannover 96
-  Hertha BSC
-  RB Leipzig
-  SC Freiburg
-  SV Werder Bremen
-  TSG 1899 Hoffenheim
-  VfB Stuttgart
-  VfL Wolfsburg

LaLiga (Spain)

-  Athletic Bilbao
-  Atlético Madrid
-  C.D. Leganés
-  Celta Vigo
-  Deportivo Alavés
-  Deportivo La Coruña
-  Espanyol Barcelona
-  F.C. Barcelona
-  F.C. Getafe
-  F.C. Girona
-  F.C. Málaga
-  F.C. Sevilla
-  F.C. Valencia
-  F.C. Villarreal
-  Rayo Vallecano
-  Real Betis
-  Real Madrid
-  Real Sociedad San Sebastián
-  Real Valladolid
-  S.D. Eibar
-  S.D. Huesca
-  U.D. Las Palmas
-  U.D. Levante

Serie A (Italy)

-  AC Chievo Verona
-  AC Milan
-  Atalanta Bergamo
-  Benevento Calcio
-  Bologna
-  Cagliari Calcio
-  F.C. Crotone
-  Fiorentina
-  Frosinone Calcio
-  Genoa C.F.C.
-  Hellas Verona
-  Inter Milan
-  Juventus F.C.
-  Lazio
-  Napoli
-  Parma
-  Roma
-  Sampdoria
-  Sassuolo Calcio
-  SPAL Ferrara
-  Torino
-  Udinese Calcio

Ligue 1 (France)

-  Angers SCO
-  AS Monaco
-  AS Saint-Étienne
-  Dijon FCO
-  EA Guingamp
-  ES Troyes AC
-  FC Metz
-  FC Nantes
-  FC Toulouse
-  Girondins Bordeaux
-  Lille OSC
-  Montpellier HSC
-  Nîmes Olympique
-  OGC Nizza
-  Olympique Lyonnais
-  Olympique de Marseille
-  Paris Saint-Germain
-  Racing Strasbourg
-  SC Amiens
-  SM Caen
-  Stade Reims
-  Stade Rennes

The Premier League and its clubs are Europe-wide fan magnets, other leagues follow at some distance

Introduction – key insights

The motherland of football is not the most football-crazy country

In England, 51% of the adult population are interested in football and 43% are fans of at least one Premier League club. Only France has a lower share of people interested in football. Spain has the highest share of adults interested in football (70%) and of club fans (67%).

A fan landscape centered around just a few top clubs is a phenomenon typical of LaLiga and Serie A

In Spain, the concentration on the top 3 clubs is highest with 76% of favourite club votes, followed by Italy with 66%. Premier League and Bundesliga fans distribute over far more clubs, leaving a bigger piece of the pie for more clubs.

The Premier League has by far the largest potential of foreign fans, other leagues fall short

The Premier League has a foreign fan potential of at least 65 million people in Germany, France, Italy and Spain. Thus, it is not surprising that 5 of the 10 European clubs with the biggest foreign fan potential are Premier League clubs with Liverpool F.C. being strongest.

Ronaldo and Messi are the only true European stars

Cristiano Ronaldo – despite current accusations in the media – is the

most popular footballer in Europe, followed by Lionel Messi. These two stars are unique in being the favourite player of a significant number of football fans across all five EFB countries.

Spanish, Italian and French fans inform themselves online more frequently than English & German fans

The share of fans consulting information about football online is highest in Spain (86%), followed by Italy (84%) and France (81%). The same three countries have the highest share of football app users, England and Germany follow at some distance.

Paying for football on TV is most common in Italy and England

Germany and Spain have the lowest share of fans following football games on pay-TV. Paying to view football games is most established in Italy and England.

Betting/gambling companies as kit sponsors dominate the Premier League but have an acceptance problem

The Premier League's main kit sponsor landscape is far less diverse than that of other leagues, as it is dominated by betting/gambling companies. Those might bring in money but fans do not think that they fit their clubs.

KNOWING THE FANS



Being a football fan is most expensive in England and cheapest in Germany

Knowing the fans – countries and leagues overview



1: Nielsen Sports 2: favourite club, fans & persons who love/like it
 "And which club is your favourite first division club?"; "How is your personal relation to the following football clubs?"; "How much have you spent on merchandise products of your favourite first division club in the past 12 months? If you're not sure, please estimate."

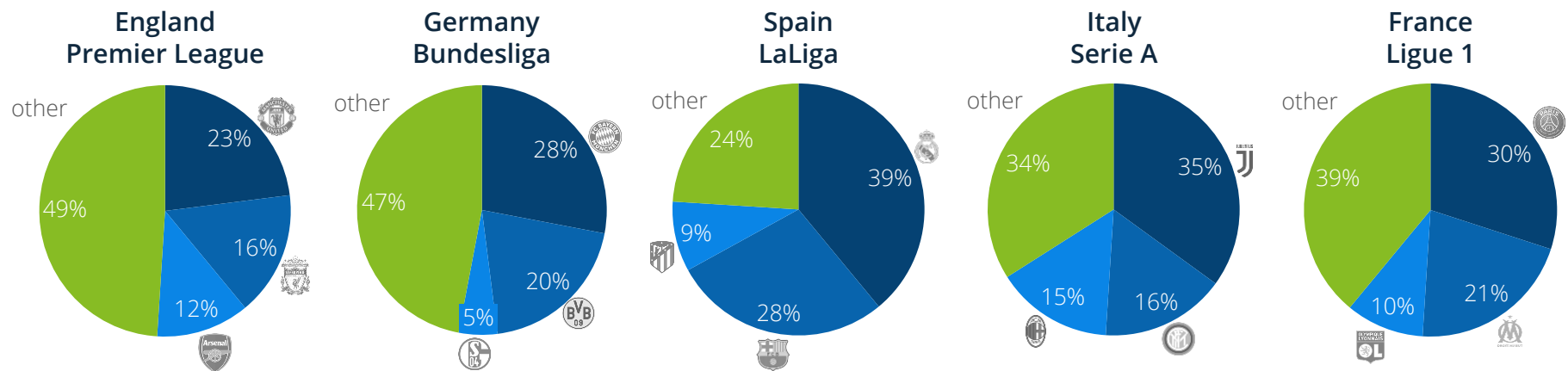
Euro and Pound Sterling converted at the rate applicable on 22.11.2018: €1=£0,89

Source: [Statista European Football Benchmark 2018](#), Statista estimate

A fan landscape centered around just a few top clubs is a phenomenon typical of LaLiga and Serie A

Knowing the fans – fan concentration

Top 3 most favourite clubs of the league



Fan concentration differs widely between the European football leagues.

In Spain, 76% of „favourite club“ votes concentrate on the Top 3 LaLiga clubs – a share which is unique among the top 5 leagues.

In Italy, concentration on the top 3 is a bit lower, leaving 34% of fans to 17 other Serie A clubs.

Premier League fans as well as **Bundesliga** fans spread over more clubs, leaving a bigger share of the pie for the non-top clubs of the leagues.

"And which club is your favourite <national league> club?"; England n=2,755, Germany n=2,455, Spain n=2,941, Italy n=2,903, France n=2,695; respondents who are fan of at least one club

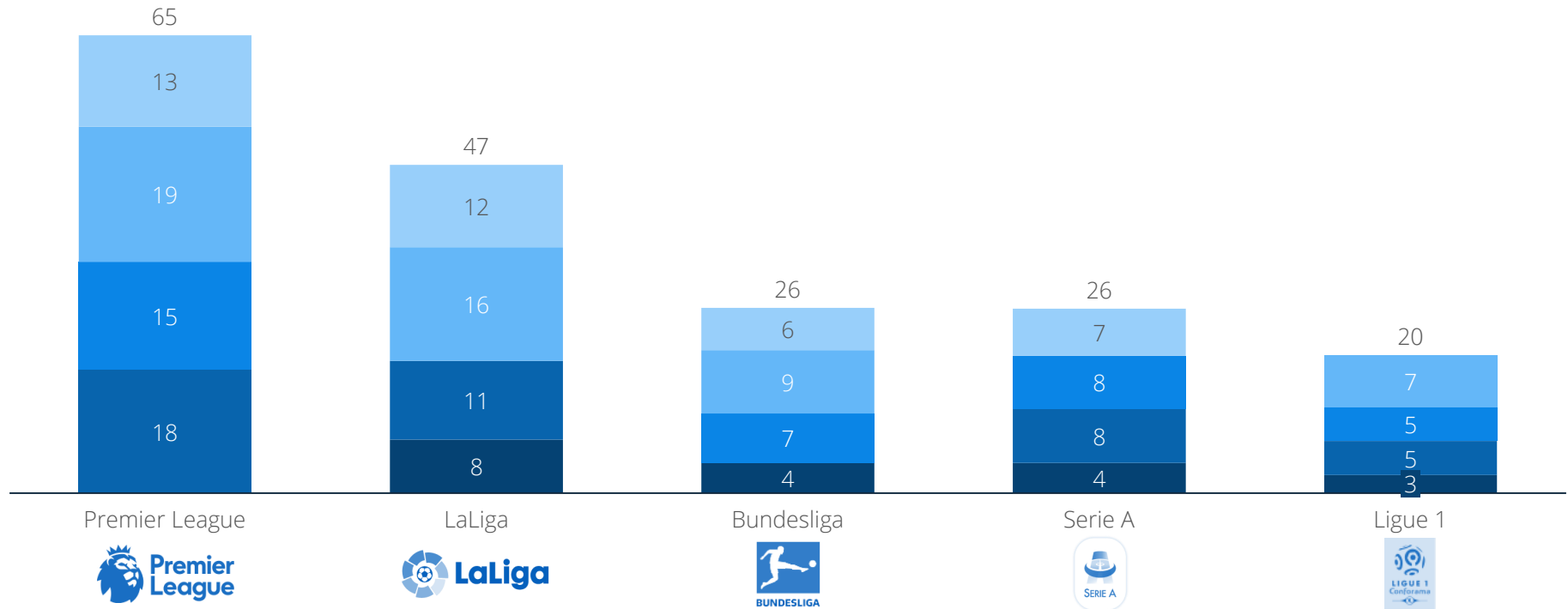
Source: [Statista European Football Benchmark 2018](#)

The Premier League has by far the largest potential of foreign fans, other leagues fall short

Knowing the fans – foreign fan potential of the leagues

Foreign fan potential (persons interested in the leagues) in million

Interested fans in England Interested fans in Germany Interested fans in Spain Interested fans in Italy Interested fans in France



Note: Totals may not sum up due to roundings

"Which of these other European leagues are you interested in (e.g. results, transfers, news)?" Multi Pick; England n=3,167, Germany n=3,030, Spain n=3,054, Italy n=3,003, France n=3,007

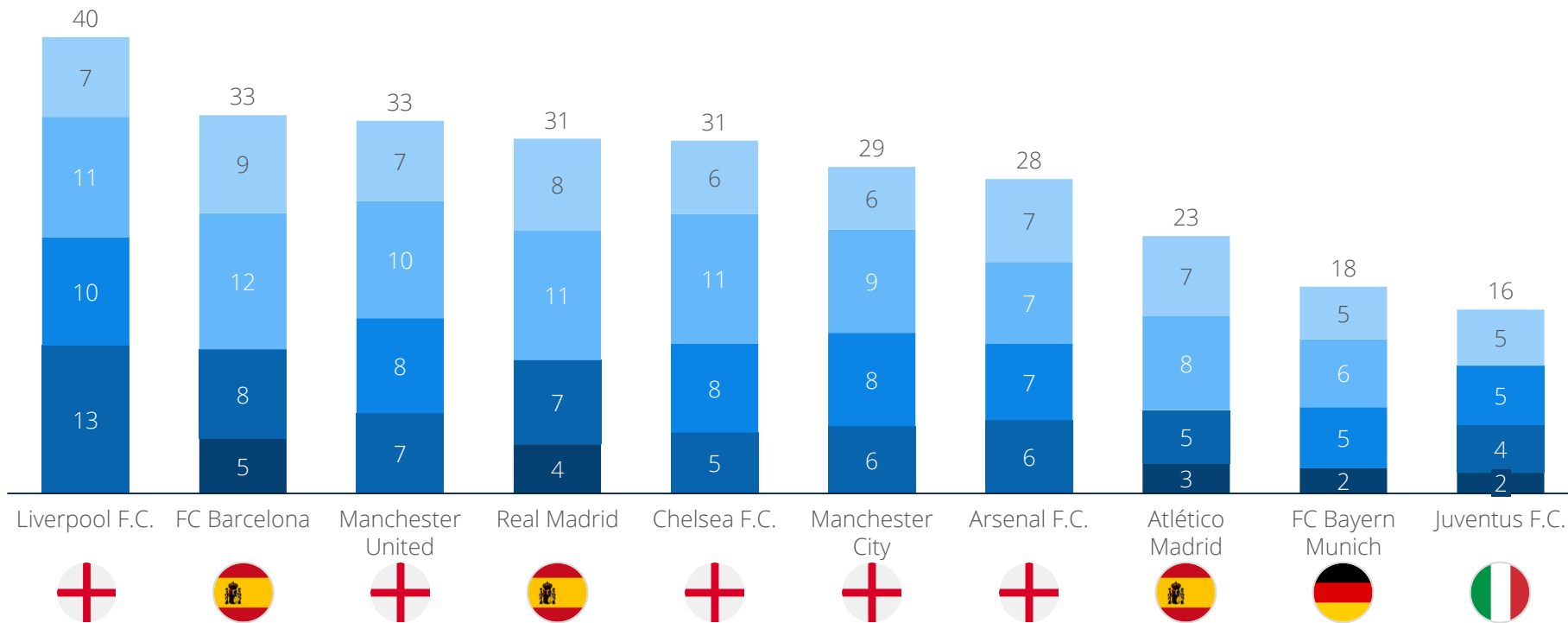
Source: [Statista European Football Benchmark 2018](#)

Premier League and LaLiga clubs are most attractive to foreign fans

Knowing the fans – top 10 clubs by foreign fan potential

Foreign fan potential (persons interested in the clubs) in million

Interested fans in England Interested fans in Germany Interested fans in Spain Interested fans in Italy Interested fans in France



Note: Totals may not sum up due to roundings

"Which of the following <league> clubs are you especially interested in (e.g. results, transfers, news)?"; Multi Pick; England n=3,167, Germany n=3,030,

Spain n=3,054, Italy n=3,003, France n=3,007

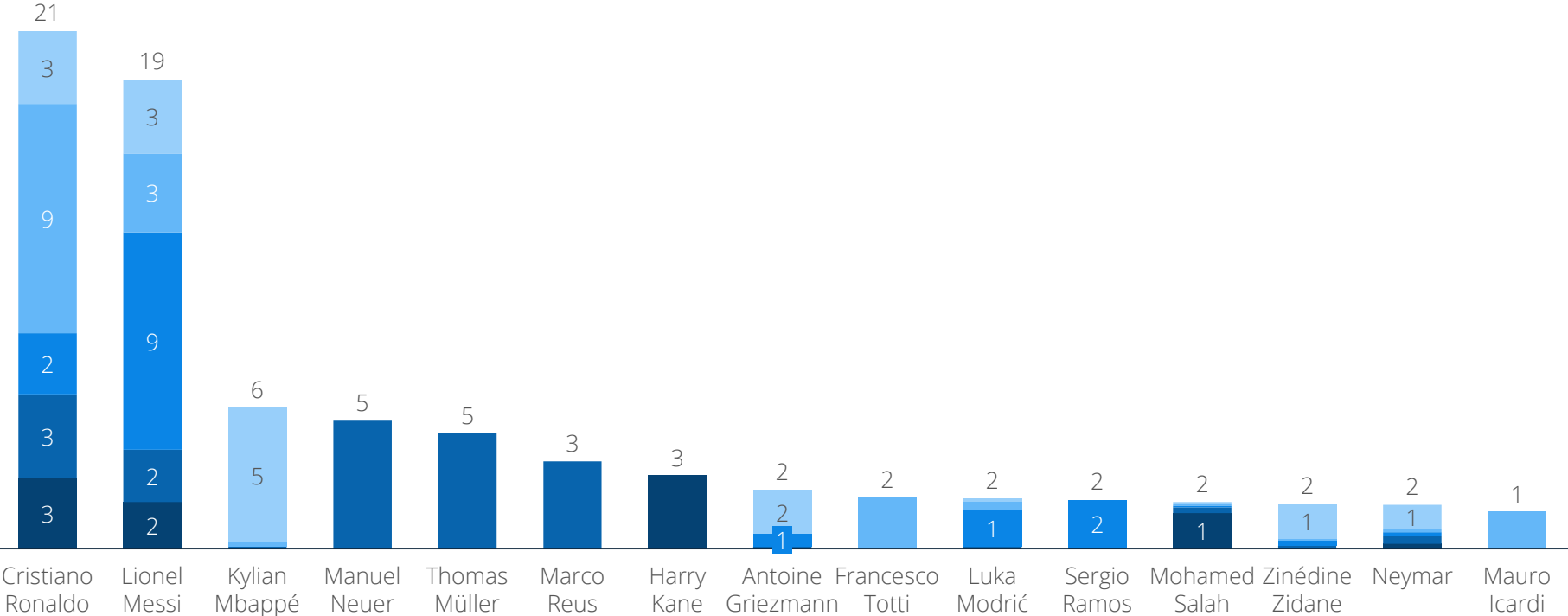
Source: [Statista European Football Benchmark 2018](#)

Cristiano Ronaldo and Lionel Messi are the only true pan-European football stars

Knowing the fans – top 15 most favourite players

Favourite player, fans in million

Fans in England Fans in Germany Fans in Spain Fans in Italy Fans in France

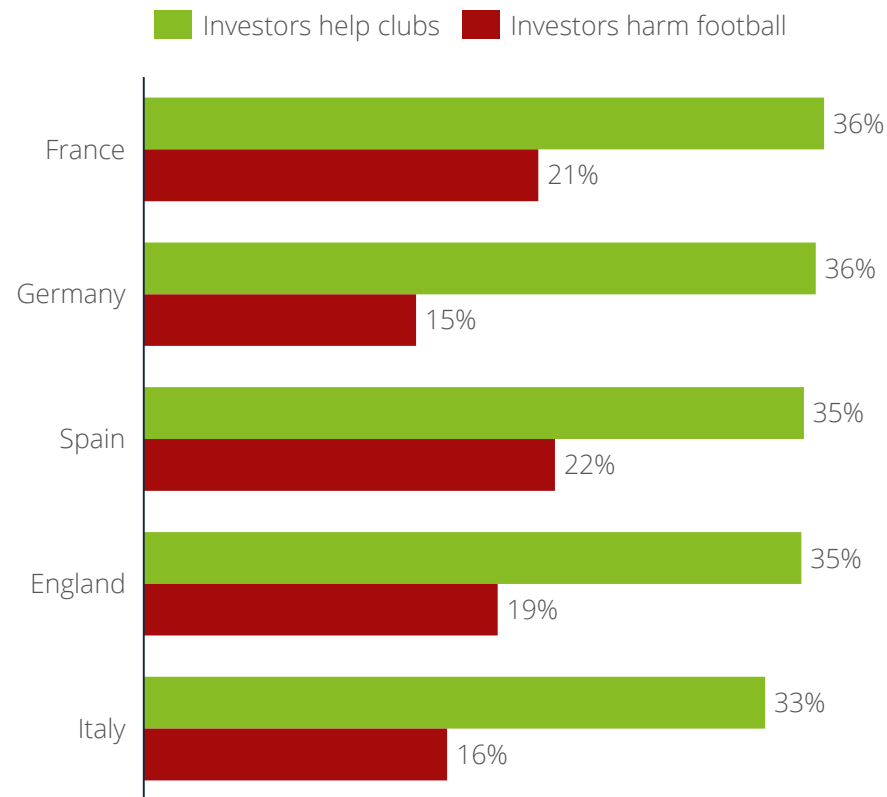


Note: To improve readability, numbers smaller than 1 are not shown; Totals may not sum up due to roundings
 "Who is your favourite football player?"; Open Question; England n=3,167, Germany n=3,030, Spain n=3,054, Italy n=3,003, France n=3,007
 Source: [Statista European Football Benchmark 2018](#)

Investors have a generally positive image everywhere, Spanish and French fans are most critical

Knowing the fans – attitudes towards investors

Attitudes towards investors



Merits of investors' commitments to football clubs are seen almost equally throughout the leagues, with **France having the highest share of football fans thinking that investors help clubs** to stay or become competitive.

The share of fans saying that investors harm football is considerably lower with **especially German and Italian fans seeing investors in football clubs not as a threat to football.**

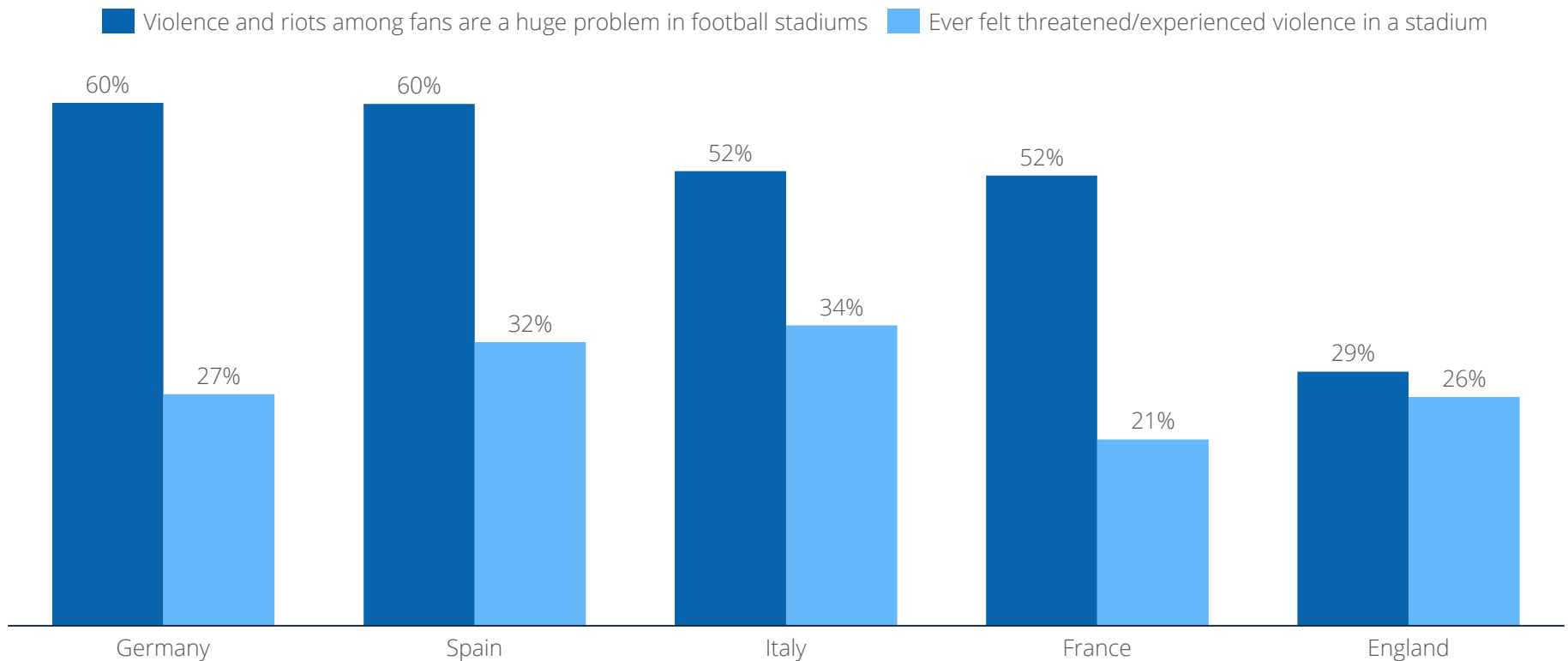
"Which of the following statements concerning investors in football clubs do you agree with?"; Multi Pick; England n=3,167, Germany n=3,030, Spain n=3,054, Italy n=3,003, France n=3,007

Source: [Statista European Football Benchmark 2018](#)

Perceiving violence in football stadiums as a huge problem is not necessarily based on own experience

Knowing the fans – attitudes towards danger in stadiums

Perception of violence and danger in stadiums

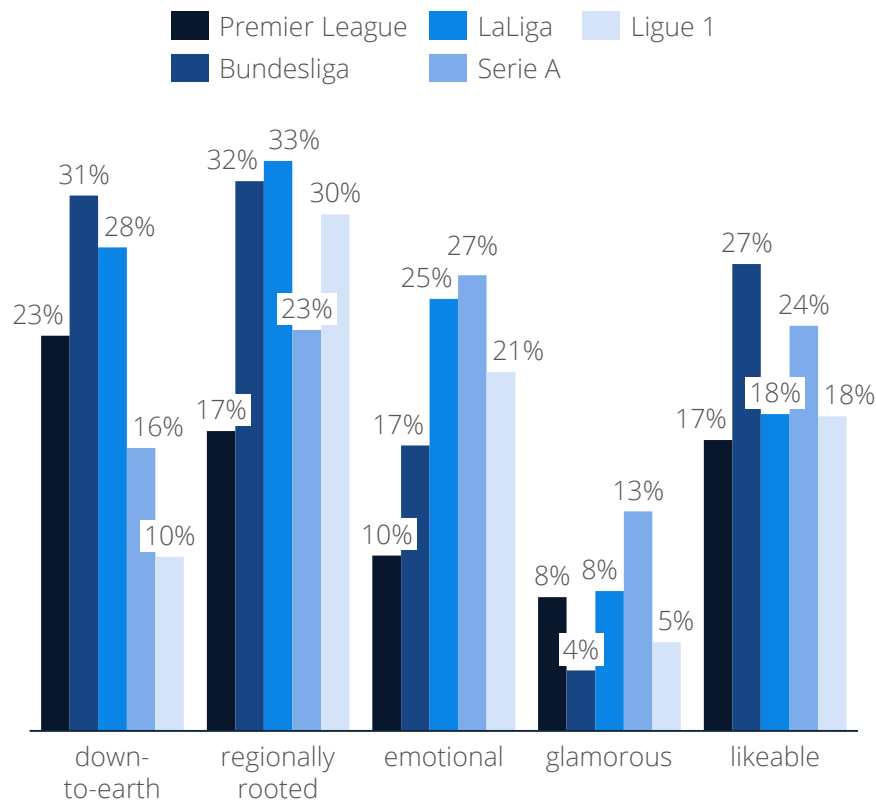


"Which of the following statements concerning danger and violence in the stadium do you agree with?" – "Violence and riots among fans are a huge problem in football stadiums"; Multi Pick; "Have you ever felt threatened or experienced violence in a stadium?"; England n=3,167, Germany n=3,030, Spain n=3,054, Italy n=3,003, France n=3,007
Source: [Statista European Football Benchmark 2018](#)

Serie A fans see their clubs as more emotional and glamorous but less down-to-earth

Knowing the fans – club image

Average image scores among club supporters



A comparison of the average image attributes that supporters attest their clubs shows distinct differences among the leagues.

Serie A and LaLiga fans see their clubs as more emotional than fans of clubs of the other leagues.

Bundesliga and LaLiga fans see their clubs significantly more regionally rooted than especially fans of Premier League clubs.

Serie A fans attest their clubs to be glamorous far more often than fans of other leagues. What **Bundesliga** clubs lack in being perceived as glamorous, they seem to put right by being likeable, at least in the perception of their fans.

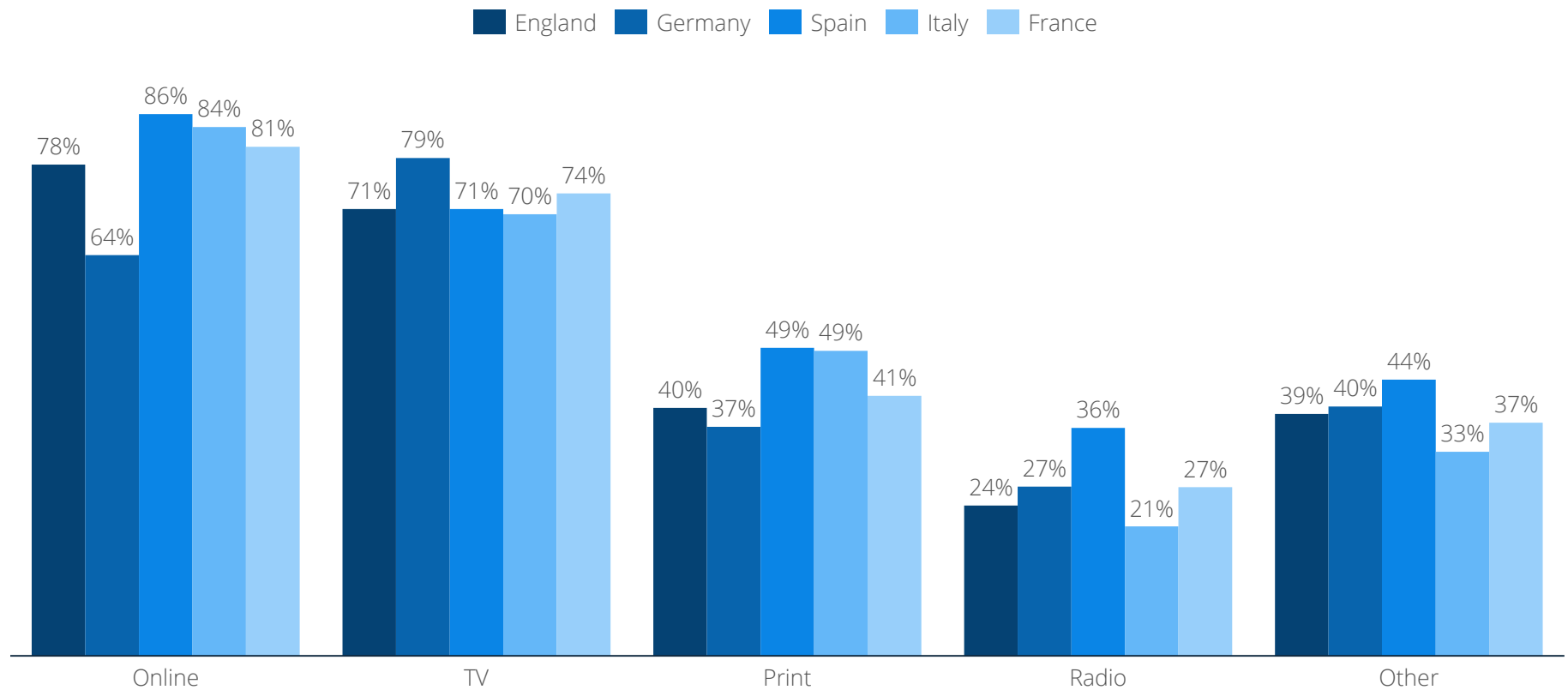
REACHING OUT TO THE FANS



Spanish, Italian and French fans inform themselves online more frequently than English & German fans

Reaching out to the fans – information channels

Sources of information about football



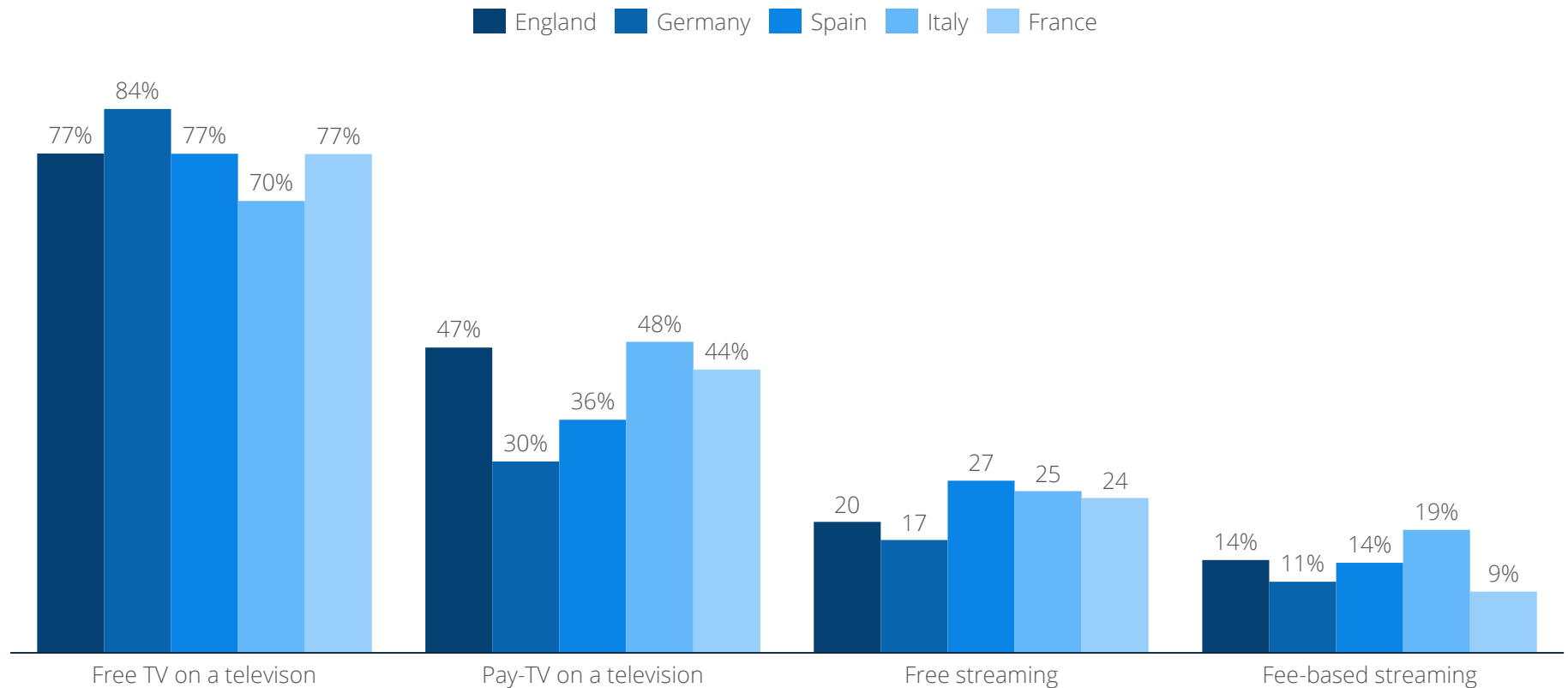
"Where do you get information about football [- also beyond the current World Cup]?"; Multi Pick; England n=3,167, Germany n=3,030, Spain n=3,054, Italy n=3,003, France n=3,007

Source: [Statista European Football Benchmark 2018](#)

Paying for football on TV is most common in Italy and England

Reaching out to the fans – pay-TV

Channels used to follow football games

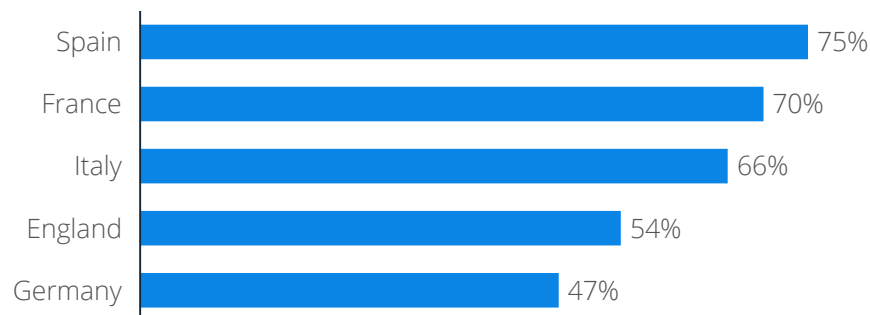


"Through which channels do you follow football games (live games as well as summaries and post-match reports)?"; Multi Pick; England n=3,167, Germany n=3,030, Spain n=3,054, Italy n=3,003, France n=3,007
Source: [Statista European Football Benchmark 2018](#)

Premier League clubs do best in reaching their fans via football apps

Reaching out to the fans – football apps

Usage of football apps



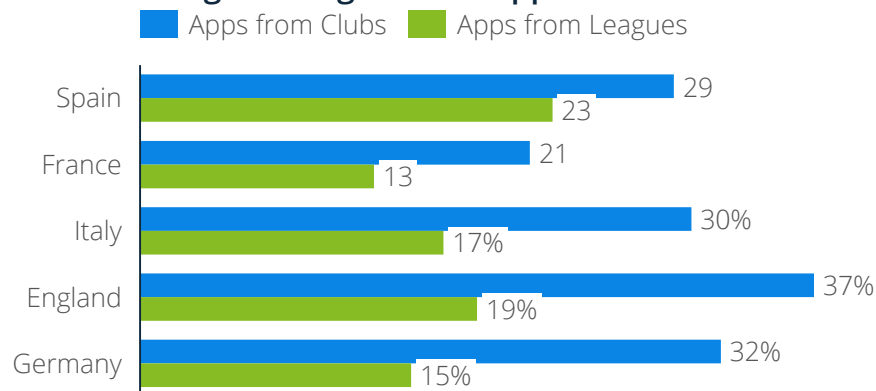
Spain has the highest share of football fans using football apps in general, Germany ranks lowest in this regard.

France has the second highest share of football fans using football apps in general, but **falls short on the share of fans using apps from clubs and apps from leagues.**

Assuming that the category “apps from leagues” is mainly represented by apps of the first national division leads to the conclusion that the French LFP (Ligue de Football Professionnel) as well as **Ligue 1 clubs still have a lot of potential unused in reaching the fans via apps.**

Germany has by far the lowest share of football app users and therefore leaves a lot of room for football fans to digitise their passion. On the other hand, among those few 47% who use football apps, apps from clubs perform surprisingly well.

Share of usage among football app users



Note: Reading example: 37% of English respondents that use football apps use apps from clubs
"What kinds of football apps do you use?"; Multi Pick; England n=3,167, Germany n=3,030, Spain n=3,054, Italy n=3,003, France n=3,007
Source: [Statista European Football Benchmark 2018](#)

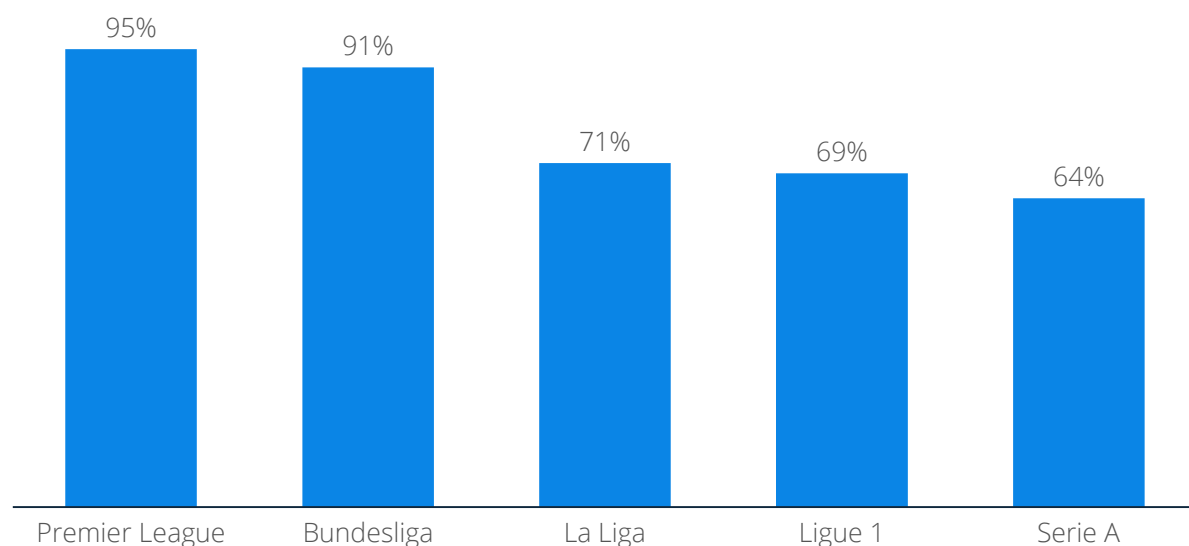
ACTIVATING THE FANS



Women still make up the minority of stadium visitors

Activating the fans – stadium visitors

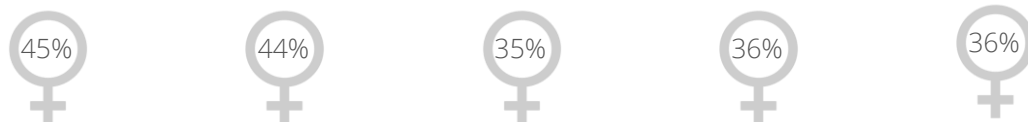
Stadium capacity utilisation 2017/18¹



Premier League clubs have the highest stadium capacity utilisation out of the 5 big leagues, with 95% in 2017/18. The German Bundesliga follows closely with 91%. Spain, France and Italy are far behind with a utilisation of only 71%-64%.

One approach to improving stadium utilisation could be to attract more women to attend football matches. While **England and Germany have the highest shares of women having attended a football match at a stadium** in the past 12 months (45% and 44% respectively), women still make up the minority of stadium goers. In Spain, France and Italy only one third of stadium visitors are women, which leaves a lot of untapped potential.

Share of female stadium-goers



1: transfermarkt.de; Statista calculations

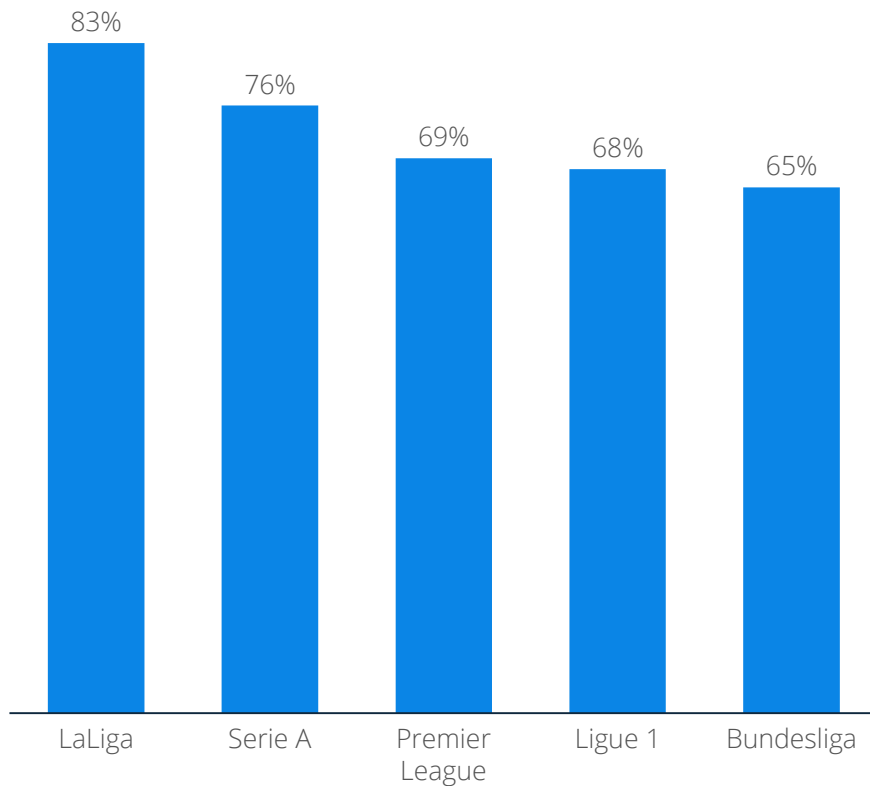
"How often have you seen a football match at a stadium in the past 12 months?"; England n=3,167, Germany n=3,030, Spain n=3,054, Italy n=3,003, France n=3,007

Source: [Statista European Football Benchmark 2018](#)

Clubs of Bundesliga, Ligue 1 and Premier League still have potential in selling merchandise to their fans

Activating the fans – merchandise

Ownership of merchandise of favourite club



Football merchandise has two main purposes: A source of income for the clubs on the one hand, and a means of representing their club for the fans on the other hand.

LaLiga clubs on the one end of the scale do well in monetising their fans through merchandise, with 83% of respondents owning merchandise of their favourite LaLiga club.

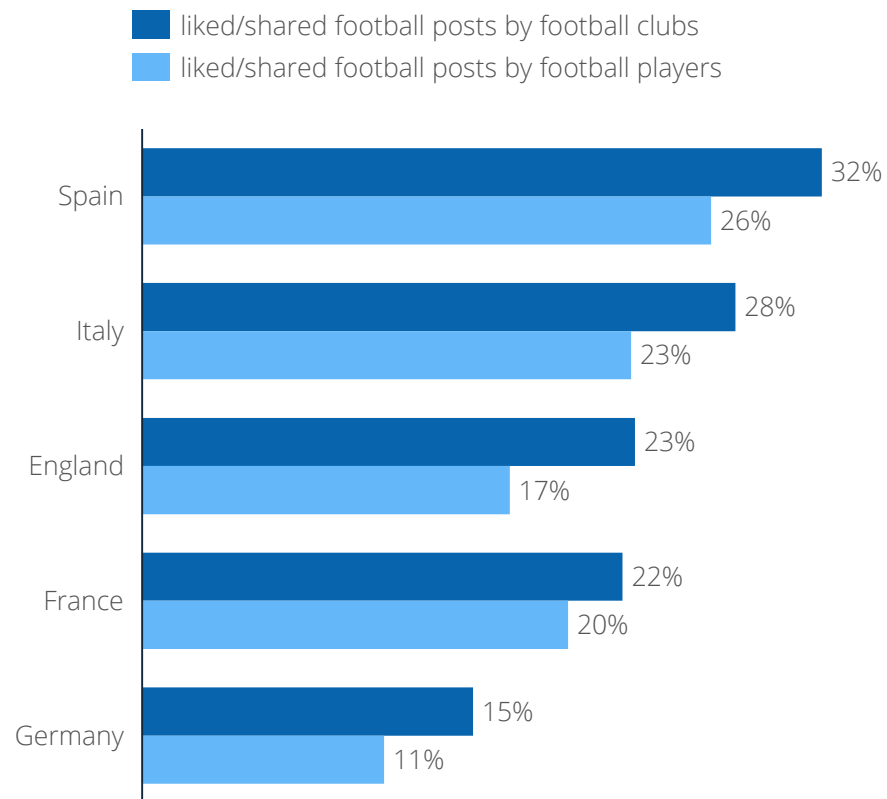
Bundesliga clubs on the other end of the scale still have a lot of potential when it comes to outfitting their supporters with kits, scarfs, shirts, etc.

"Do you own merchandise products by your favourite <national league> club?"; Multi Pick; England n=2,630, Germany n=2,437, Spain n=2,921, Italy n=2,891, France n=2,665; respondents who have a favourite <national league> club
Source: [Statista European Football Benchmark 2018](#)

LaLiga clubs and players do best in activating their fans on social media

Activating the fans – social media

Ownership of merchandise of favourite club



Social media is a viable means of activating and binding fans.

32% of Spanish respondents had liked/shared posts by football clubs in the 3 months prior to the interview, which makes **Spanish football clubs number one in activating their fans on social media.**

The players of LaLiga do well, too: 26% of Spanish respondents had liked or shared posts by football players – more than in any other country surveyed by the European Football Benchmark.

German fans do not seem to be that fond of living their football passion on social media. **Bundesliga clubs and Bundesliga players still have a lot of potential when it comes to social media activation of their fans.**

"Which of the following things related to football have you done on social networks in the past 3 months?"; Multi Pick; England n=3,167, Germany n=3,030, Spain n=3,054, Italy n=3,003, France n=3,007
Source: [Statista European Football Benchmark 2018](#)

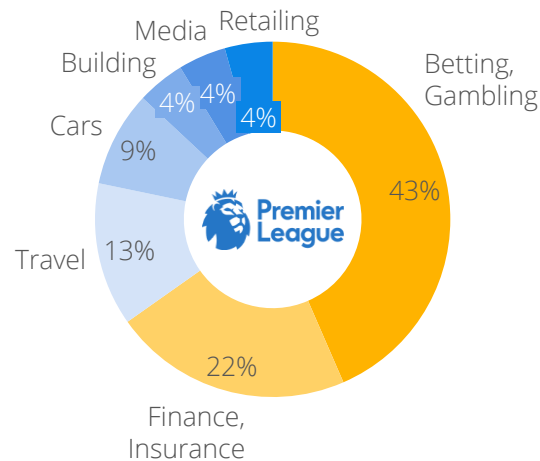
MONETISING THE FANS



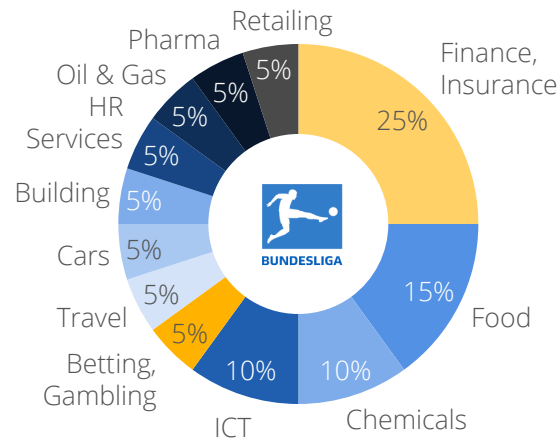
The main kit sponsor landscape of the Premier League is far less diverse than that of other leagues

Monetising the fans – sponsor landscapes

Premier League's main kit sponsors by business



Bundesliga main kit sponsors by business



The main kit sponsor landscape in the Premier League is dominated by betting and gambling companies. 10 out of 23 main kit sponsors are active in that business.

This is unique among the big 5 European football leagues as the example of **Bundesliga** shows, where the setting of main kit sponsors has a **far more diverse structure**.

The business and type of a main kit sponsor have an effect on how well it fits the club in the perception of the fans.

Local connection between club and sponsor make for a good sponsor-club fit

Monetising the fans – top 15 sponsor-club fits¹

Top 15 sponsor-club fits¹ as perceived by supporters²

#	Club & Sponsor	%	League	Business
1	TSG 1899 Hoffenheim & SAP	96%	Bundesliga	Software
2	Cagliari & Ichnusa	96%	Serie A	Food
3	SC Freiburg & Schwarzwaldmilch	93%	Bundesliga	Food
4	UD Las Palmas & Gran Canaria	92%	LaLiga	Travel
5	Juventus & Jeep	92%	Serie A	Cars, manufacturing
6	Inter & Pirelli	92%	Serie A	Cars, manufacturing
7	Villarreal CF & Pamesa Ceramica	91%	LaLiga	Building
8	Chievo Verona & Paluani	91%	Serie A	Food
9	VfL Wolfsburg & Volkswagen	90%	Bundesliga	Cars, manufacturing
10	RC Deportivo & Estrella Galicia	90%	LaLiga	Food
11	Udinese & Dacia	90%	Serie A	Cars, manufacturing
12	SD Huesca & Huesca La Magia	89%	LaLiga	Travel
13	Sassuolo & Mapei	89%	Serie A	Chemicals
14	VfB Stuttgart & Mercedes-Benz-Bank	88%	Bundeliga	Finance, insurance
15	RC Celta & Estrella Galicia	88%	LaLiga	Food

Bundesliga, Serie A and LaLiga dominate the top 15 of best sponsor-club fits out of the big 5 leagues.

TSG 1899 Hoffenheim and their sponsor, the local company **SAP**, share 1st place, followed by **Cagliari** and Cagliari-based brewing company **Ichnusa** – both of them have 96% of their supporters saying that the brand suits the club well.

Most of the top 15 fitting sponsor-club combinations have a sponsor that has a **strong local or regional connection with the club**, e.g. Hoffenheim and the locally rooted software company SAP, Cagliari and Sardinian brewery Ichnusa or Freiburg and Schwarzwaldmilch, a Freiburg-based milk processing consortium.

Strikingly, **no Premier League or Ligue 1 clubs-sponsor combination makes this ranking...**

1: Answers "suits very well" and "suits rather well" 2: Based on questions about relation to clubs (favourite club, fans and "thrills me / love it" or "like it")

"How well does the brand ... suit the club ...?"; only supporters of the respective club
Source: [Statista European Football Benchmark 2018](#)

Betting/gambling companies are overrepresented among the least fitting sponsor-club combinations

Monetising the fans – bottom 15 sponsor-club fits¹

Bottom 15 sponsor-club fits¹ as perceived by supporters²

#	Club & Sponsor	%	League	Business
87	Fulham F.C. & Grosvenor Casinos	59%	Premier League	Betting, gambling
88	Hertha BSC & Bet-at-home.com	59%	Bundesliga	Betting, gambling
89	1. FSV Mainz 05 & Kömmerling	58%	Bundesliga	Chemicals
90	Fiorentina & folletto (Vorwerk)	58%	Serie A	Electronics
91	Deportivo Alavés & betway	57%	LaLiga	Betting, gambling
92	Real Betis & OTC Desks	57%	LaLiga	Trade
93	Girona FC & Marathon Bet	57%	LaLiga	Betting, gambling
94	Wolv. Wanderers & the money shop	56%	Premier League	Finance, insurance
95	Watford F.C. & FxPro	55%	Premier League	Finance, insurance
96	Borussia Mönchengladbach & Postbank	55%	Bundesliga	Finance
97	FC Schalke 04 & Gazprom	54%	Bundesliga	Oil & Gas
98	Burnley F.C. & Dafabet	52%	Premier League	Betting, gambling
99	SV Werder Bremen & Wiesenhof	50%	Bundesliga	Food
100	RCD Espanyol & Riviera Maya	49%	LaLiga	Travel
101	Newcastle United & Fun88	46%	Premier League	Betting, gambling

Of the 101 first division sponsor-club fits the European Football Benchmark surveyed, the bottom 15 show that betting/gambling companies seem to have an acceptance problem as main kit sponsors.

Newcastle United and **Fun88** are the least fitting sponsor-club combination in all of the big 5 European football leagues.

Apart from betting/gambling companies, there is no apparent pattern in the bottom 15, except that three of the sponsors are from the finance sector.

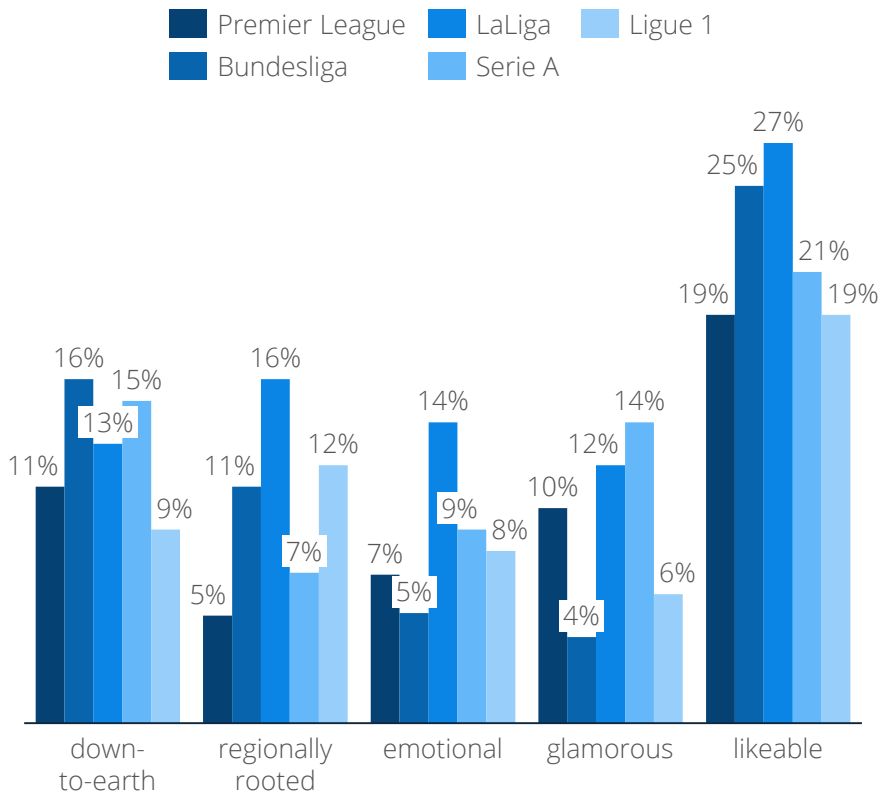
1: Answers "suits very well" and "suits rather well" 2: Based on questions about relation to clubs (favourite club, fans and "thrills me / love it" or "like it")

"How well does the brand ... suit the club ...?"; only supporters of the respective club
Source: [Statista European Football Benchmark 2018](#)

Bundesliga fans see the sponsors as down-to earth, LaLiga fans see the sponsors as regionally rooted

Monetising the fans – sponsor image

Average image scores of main kit sponsors



The average likeability of **LaLiga** kit sponsors (as perceived by football fans) is highest of all leagues. At the same time, they are seen as most regionally rooted and above-average down-to-earth.

Bundesliga fans have a similar impression of their sponsors.

Premier League fans on average see the league's main kit sponsors as not regionally rooted. Together with **League 1** fans, they furthermore attest the clubs' sponsors not to be particularly down-to-earth or likeable.

APPENDIX



The European Football Benchmark – a close-up of clubs, sponsors and fans

Appendix – survey overview

The **Statista European Football Benchmark** – the first football survey that compares the 5 big European leagues¹ – gives you a holistic perspective on clubs, sponsors and fans of the most important European football leagues.

- **Benchmark:** The comparative European football survey for the big European leagues
- **Clubs:** All clubs of the first divisions in England, France, Germany, Italy, and Spain – awareness, image, fan-profiles
- **Sponsors:** All main kit sponsors – awareness, image, sponsor-club fit
- **Fans:** Media usage, apps & social media, attitudes, spending behaviour, stadium visits
- **DIY-Analyses:** Statistics, tables and do-it-yourself analysis tool

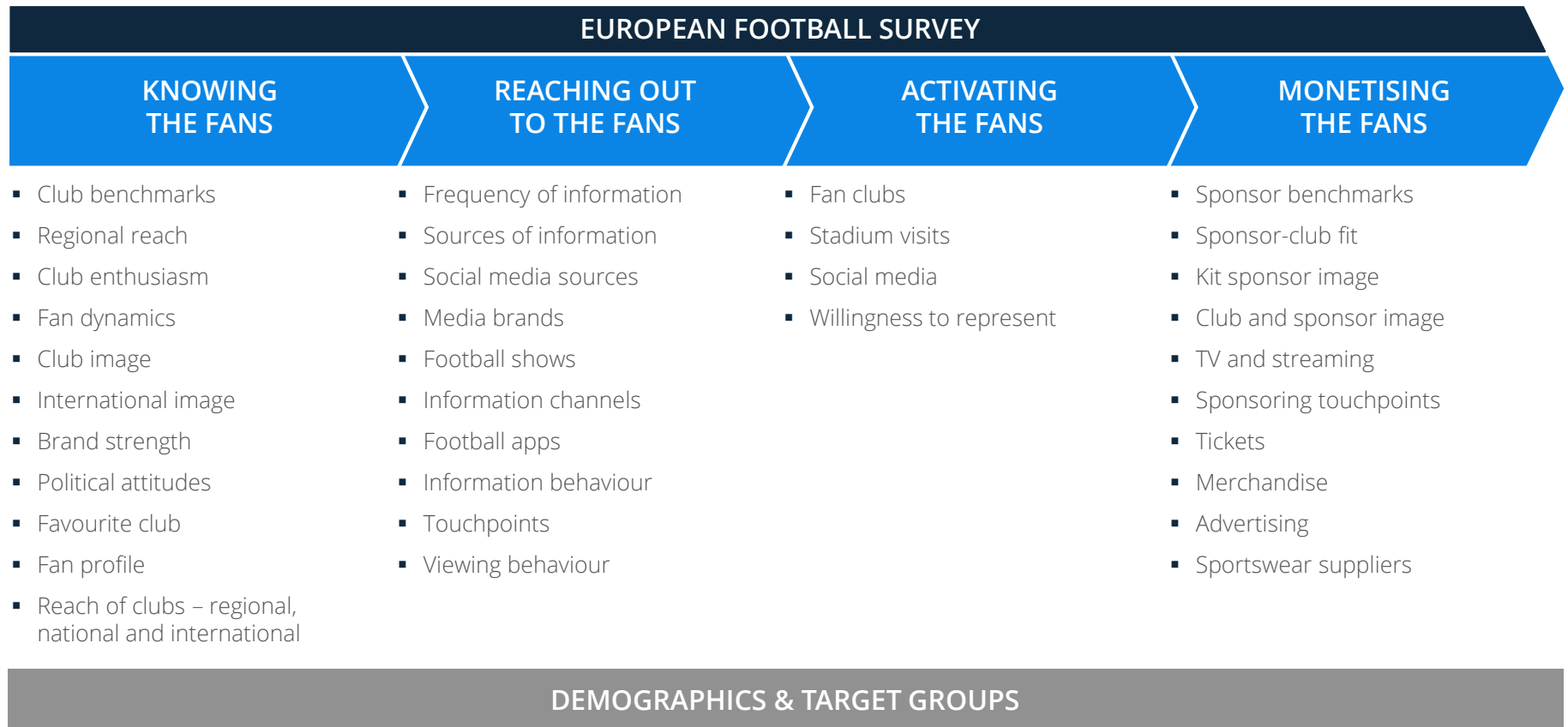
[Browse the European Football Benchmark online](#)



- ✓ **First comparative football study concentrating on an international fan perspective**
- ✓ **Standardized online questionnaire for England, Germany, Spain, Italy and France**
- ✓ **At least 3,000 football fans per country**
- ✓ **Data on all 110 clubs of the 5 big European leagues¹**
- ✓ **400 sponsors, media and sports clothing brands included**
- ✓ **Designed to help clubs, sponsors, marketers, planners and product managers to understand fan behaviour and attitudes**

Developing a fan in four steps

Appendix – survey content



The base of the European Football Benchmark: an online survey with extensive quality checks

Appendix – methodology

Methodology

The European Football Benchmark was conducted as an interactive online survey.

- 3,168 English football fans
- 3,007 French football fans
- 3,030 German football fans
- 3,003 Italian football fans
- 3,044 Spanish football fans

The target population are people with an interest in football, aged 18 years and older. Fieldwork took place in June 2018 (England, Germany) and in September 2018 (France, Italy, Spain).

Panel quality

Cint is the exclusive sample provider for the European Football Benchmark. Essential to the Cint platform are the quality standards and controls built into its research-quality-focused processes. All of Cint's systems and procedures comply with the requirements set forth in Cint's certification to ISO 20252, which defines the requirements in a Quality Management System for organizations conducting market, opinion and social research.



Comprehensive quality checks

Statista applies a consistent quality management to every step of the research process:

Measures to ensure data quality included checks for speeders, straight liners and non-response, logic and repetition tests, open questions for bot-identification, etc.

Our work complies with the guidelines set forth by BVM/ADM (Germany) and ESOMAR.

DIY analysis with the Statista Customer Cloud®

Appendix – Statista Customer Cloud®

Statista online do-it-yourself analysis tool

The customised Statista Customer Cloud® is an interactive online evaluation tool: Via mouse click you can carry out your own evaluation of the data available in the database.

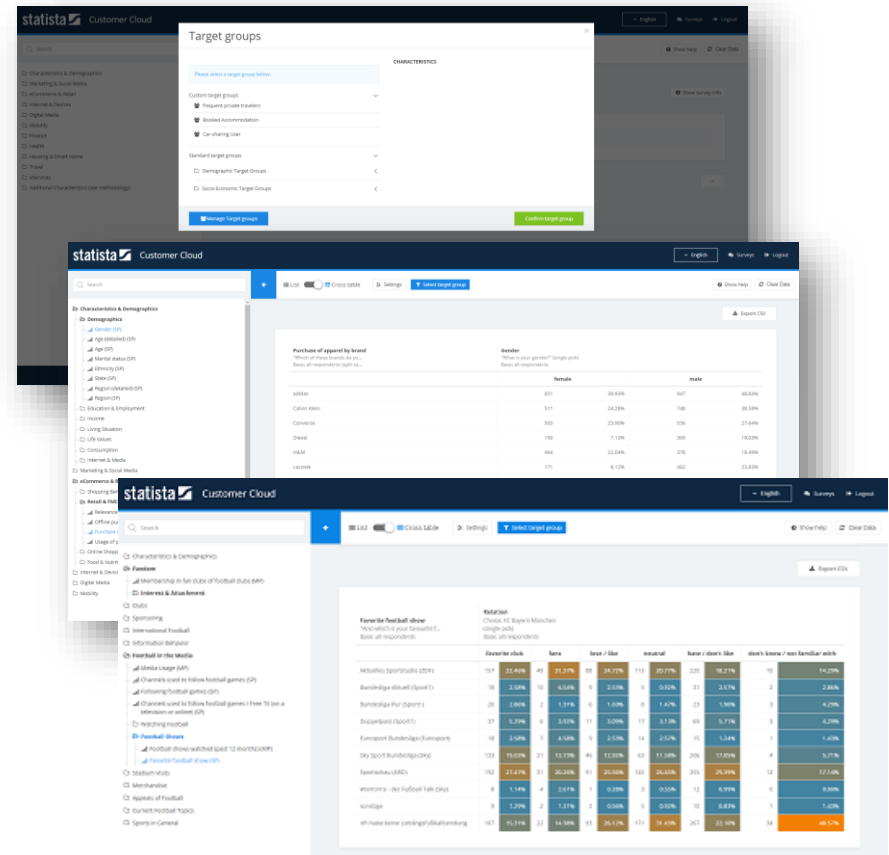
Users can select their own criteria to create cross tables and customised target groups in order to analyze the available data with a focus on their specific research question and marketing activities. All tables can be downloaded directly for further use in a CSV file format.

Browser-based solution

Features of the browser-based Statista Customer Cloud®:

- DIY online analyses
- Cross-tabulation
- Filtering and selection of specific target audiences
- Export in CSV format

Browse the European Football Benchmark online



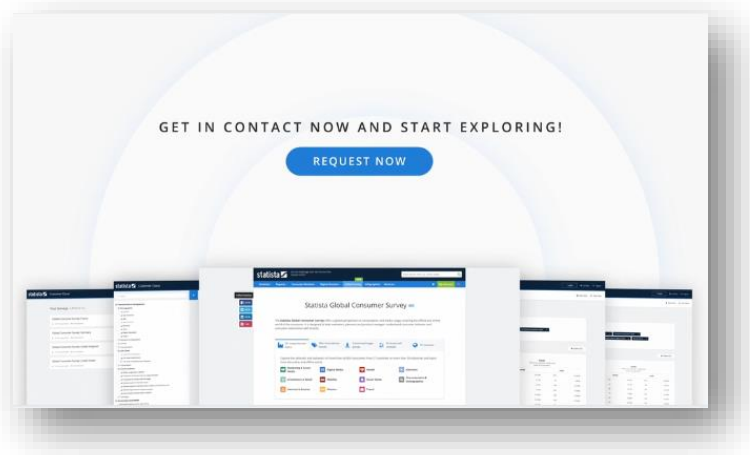
Contact us for access to the European Football Benchmark

Appendix – contact

Expert tool with exclusive European survey data

With the European Football Benchmark, Statista adds a new expert tool with data from an exclusive European survey to the existing statistics. All customers with a Statista Enterprise account will have access to this tool after activation.

An overview of the Statista Enterprise account can be found here: <https://www.statista.com/accounts/corporate/>



To find out whether your account includes the European Football Benchmark, please contact:



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Disclaimer

This study is based on survey and research data from the previously mentioned sources. The forecasts and market analysis presented were researched and prepared by Statista with great care.

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