



THE UEFA CLUB COMPETITION LANDSCAPE

Benchmarking the clubs qualified
and licensed to compete in the
UEFA competition season 2019/20



INTRODUCTION

Welcome to the first edition of the UEFA Club Competition Landscape Report.

The report takes you along the various qualification routes beginning at the domestic cups and leagues to the 237 clubs that have eventually qualified for this season's UEFA competitions qualifying phases. Furthermore, the report then shines a detailed spotlight on the 80 clubs who will take part in this season's group stages.

Produced by UEFA's Intelligence Centre, the publication is packed with bitesize data and analysis. It shows comparisons between these clubs and highlights top performers, both in terms of on-field performance and off-the-pitch benchmarks. These include club finances, club ownership and sponsorship, head coaches, social media and stadiums.

The report is short and snappy, with infographics telling the story of how the 80 clubs qualified (almost one third qualified only on the last day of the season), illustrating how they compare, and highlighting global trends.

With all analysis performed in-house, the Intelligence Centre is highly agile and constantly monitors topical trends, so the report already includes insights on this summer's transfer activity just days after the transfer window closed.



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A

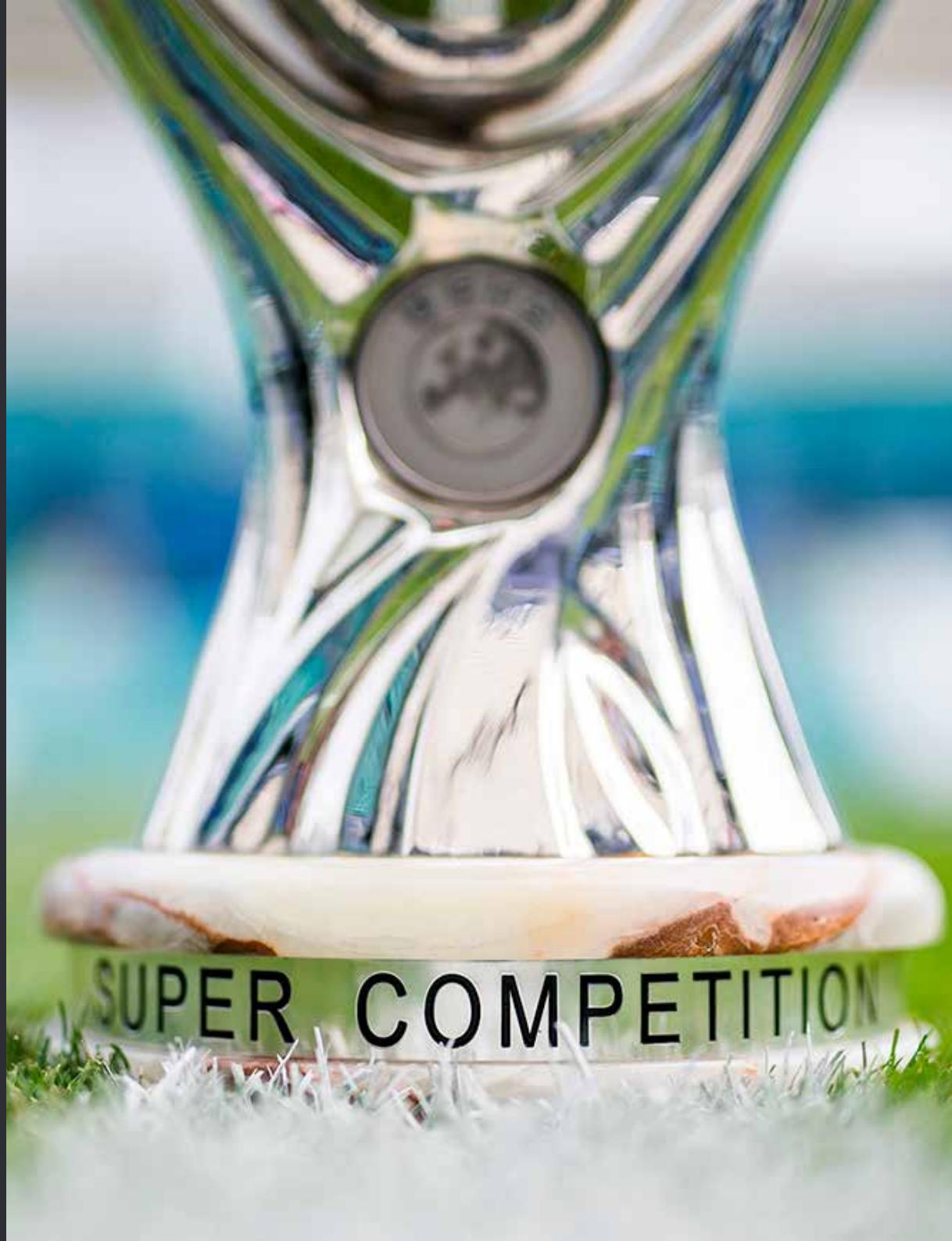
THE BIGGEST AND THE BEST

This first chapter introduces the UEFA club competitions and this season's participants.

We examine the popularity of UEFA competitions relative to other sports properties with global appeal and showcase the most successful clubs in European football this year.

05 ...The biggest stages

08 ...The best performers



The biggest stages

The UEFA Champions League is the most followed sports competition in the world

Top 5 most popular sports competitions on social media*



*Ranked by aggregate number of followers on Facebook, Instagram, YouTube and Twitter in July 2019. UEFA.tv YouTube account followers prorated across main UEFA competitions.

**July 2019 data. Premier League launched its official YouTube channel in August 2019 - it cumulates 348,030 subscribers as of September 4, 2019.

THE UEFA CLUB COMPETITION LANDSCAPE SEASON 2019/20

A THE BIGGEST STAGES

Social media popularity of major global sports events

Multiple UEFA competitions in the top 50 most popular sports competitions on social media



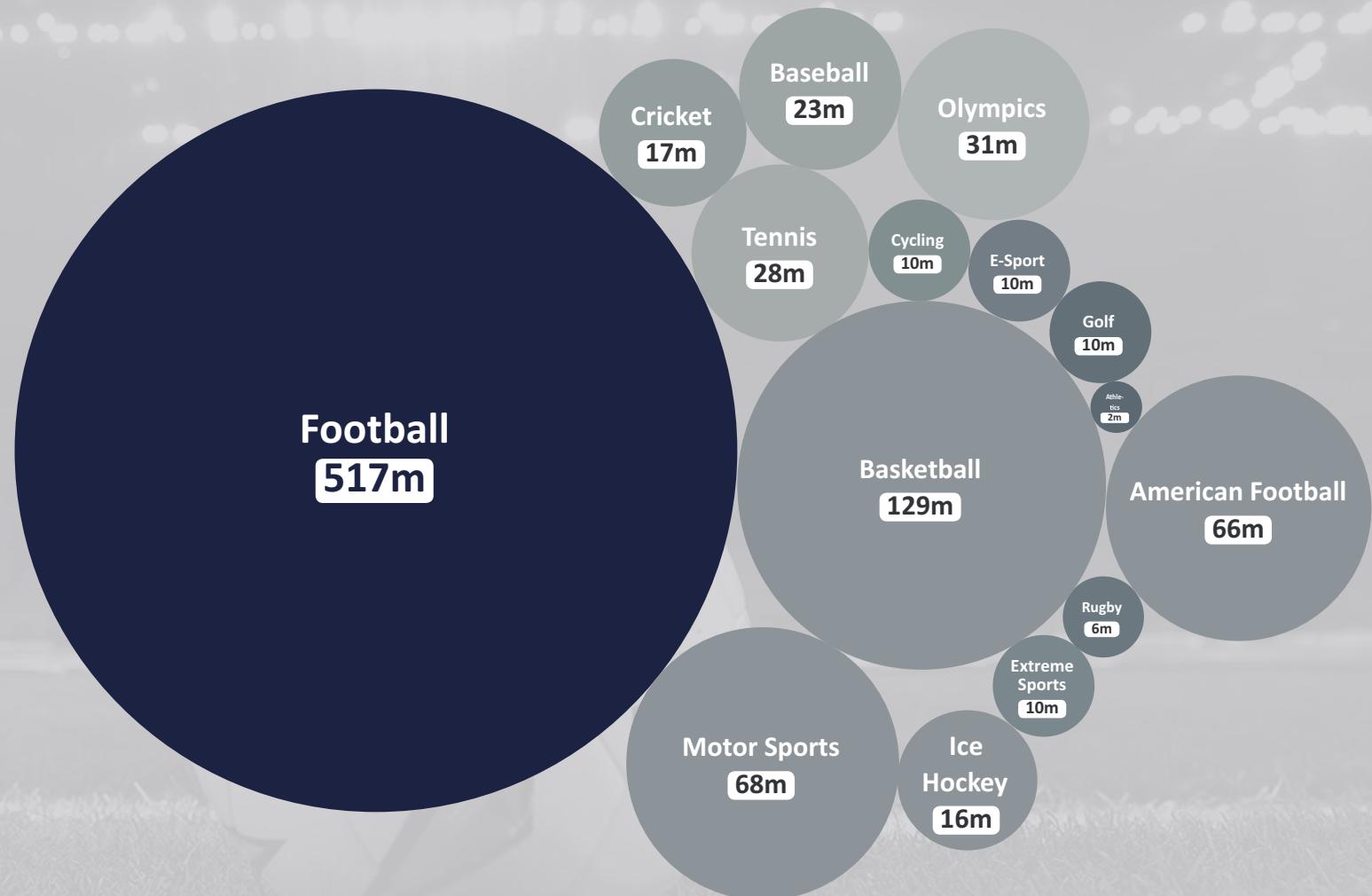
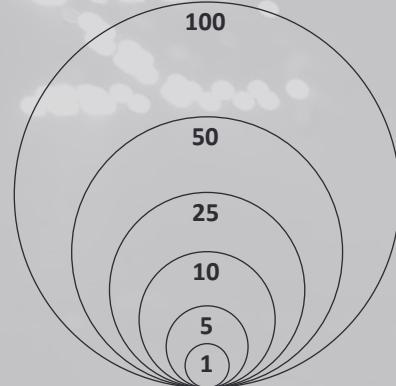
*Ranked by aggregate number of followers on Facebook, Instagram, YouTube and Twitter in July 2019. UEFA tv YouTube account followers prorated across main UEFA competitions.

THE UEFA CLUB COMPETITION LANDSCAPE SEASON 2019/20
A. THE BIGGEST STAGES

Football competitions are the most popular in the world

A combined global audience of more than half a billion fans

Total followers*
(millions)



The best performers

Combined title records of this season's UEFA competitions' 237 clubs



33
Super Cup titles



52
UEFA Champions
League titles



41
UEFA Europa
League* titles



25
Cup Winners' Cup
titles



2,006
Domestic league
titles



1,702
Domestic cup
titles

THE JOURNEY TO THIS SEASON'S GROUP STAGES

This second chapter illustrates the various qualifying routes into the UEFA Champions League and Europa League group stages.

The chapter kicks off with the domestic road to participation, highlighting some key figures of the last season's domestic competitions. This section is followed by some facts and figures from the qualification process, and introduces the clubs participating in each competition for the first time.

DOMESTIC ROAD
to participation

EUROPEAN ROAD
to participation

UEFA competitions
group stages



- 10 ... The pathway to qualification
- 11 ... Points
- 12 ... Goals
- 13 ... Attendances
- 15 ... Most successful clubs
- 16 ... New faces
- 17 ... Entry stages



The pathway to qualification

From domestic league and cup competitions, through European qualifying, to the group stages

DOMESTIC ROAD
to participation

716  3,895

clubs competed in 54 different top domestic divisions in the 2018/19 (2018) season*

clubs entered the main phase of Europe's primary domestic cup competitions in the 2018/19 (2018) season**

237 

clubs qualified for the 2019/20 UEFA competitions



80



clubs have qualified for the UEFA Champions League and Europa League group stages

Performances in domestic leagues

Highest points records across the leagues in 2018/19

DOMESTIC ROAD
to participation

Top 5 clubs with highest points total

Manchester City FC
98 points



#1

Liverpool FC
97 points



#2

GNK Dinamo Zagreb
92 points



#3

BSC Young Boys
91 points



#4

Paris Saint-Germain
91 points



#4

Top 5 clubs with highest average points per game

HB Tórshavn
Ø 2.70 points



#1

FC Shakhtar Donetsk
Ø 2.59 points



#3

PAOK FC
Ø 2.67 points



#2

Manchester City FC
Ø 2.58 points



#4

SL Benfica
Ø 2.57 points



#5

Goals across the leagues

Who scored the most? Who conceded the least?

DOMESTIC ROAD
to participation

Top 5 clubs with highest goals scored

AFC Ajax
3.50 per game



#1

FC Flora Tallinn
3.22 per game



#2

Nõmme Kalju FC
3.17 per game



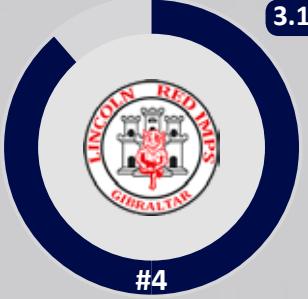
#3

Europa FC
3.11 per game



#4

Lincoln Red Imps FC
3.11 per game



#4

Top 5 clubs with lowest goals conceded

FC Shakhtar Donetsk
0.34 per game



#1

KF Feronikeli
0.42 per game



#3

FC Prishtina
0.36 per game



#2

FC Shakhtyor Soligorsk
0.47 per game



#4

PAOK FC
0.47 per game



#4

Domestic attendances in the season of qualification

Highest aggregate attendances across the leagues in 2018/19*

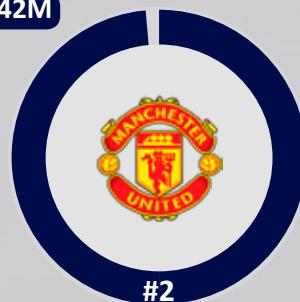
DOMESTIC ROAD
to participation

Top 5 aggregate attendances

FC Barcelona
1.44M



Manchester United FC
1.42M



Borussia Dortmund
1.37M



FC Bayern München
1.28M



Real Madrid CF
1.15M



Top 5 aggregate attendance increases

PAOK FC
+172K



FC Barcelona
+171K



SS Lazio
+118K



Olympiacos FC
+106K



FC Dynamo Kyiv
+91K



The route to 2019/20 UEFA club competitions

The various ways of qualifying

DOMESTIC ROAD
to participation

34% 

of the clubs qualified
on the last matchday

15 

teams qualified on goal difference
or head-to-head result

17 

clubs qualified by winning their
domestic cup competition



13 >  <

teams qualified through
post-season play-offs

The most successful clubs

The 2019/20 UEFA competitions feature some of the most successful clubs in Europe

EUROPEAN ROAD
to participation

Top 7 participating clubs with most European titles*



Top 5 participating clubs with most domestic trophies**



*UCL, UEL and Cup Winners' Cup, excluding Inter-City Fairs Cup and Super Cup

**Domestic league and domestic cup competitions combined, excluding domestic Super Cup and League Cup

***Including 3 Campeonato de Portugal titles

This season's debutants

A warm welcome to the clubs that are participating for the first time on record

EUROPEAN ROAD
to participation



Seven clubs from seven different countries qualified for the UEFA Champions League for the first time ever

CLUB	COUNTRY
Ararat-Armenia FC	
Atalanta BC	
Riga FC	
FC Krasnodar	

CLUB	COUNTRY
FC Saburtalo	
KF Feronikeli	
GKS Piast Gliwice	

CLUB	COUNTRY
Sabail	
FK Kauno Žalgiris	
FC Speranța Nisporeni	
KS Lechia Gdańsk*	
NS Mura	

CLUB	COUNTRY
FC Vitebsk*	
FK RFS	
Akademija Pandev	
FC Arsenal Tula	
Yeni Malatyaspor	



Ten clubs from ten different countries qualified for the UEFA Europa League for the first time on record

The different entry points to European football in 2019/20

This page sets out where the clubs are entering the qualifying route in this season's UEFA Champions League .

EUROPEAN ROAD to participation



THE UEFA CLUB COMPETITION LANDSCAPE SEASON 2019/20
B THE JOURNEY TO THIS SEASON'S GROUP STAGES

The different entry points to European football in 2019/20

EUROPEAN ROAD
to participation

This page sets out where the clubs are entering the qualifying route in this season's UEFA Europa League



The 2019/20 UEFA club competition qualifying stages

Highlights of the 204 UEFA Champions League and Europa League qualifying ties

EUROPEAN ROAD
to participation

10x 

qualifying ties
were decided in extra time

7x 

qualifying ties
were decided by a penalty shoot-out

20x 

qualifying ties
were decided by the away goals rule

9x 

of the 37 clubs eliminated in
UEFA Champions League qualifying
subsequently qualified for the
UEFA Europa League group stage*

PROFILING THE 2019/20 GROUP STAGE PARTICIPANTS

The final chapter details various aspects relevant to the participating clubs on an individual basis, and as a collective within the competition.

We examine a range of topics, providing an overview of the landscape using the latest sporting and financial data.

21 ... Group stage clubs

23 ... Club ownership

25 ... Club finances

30 ... Transfers

33 ... Club sponsors

35 ... Social and online media

40 ... Stadiums

42 ... Head coaches

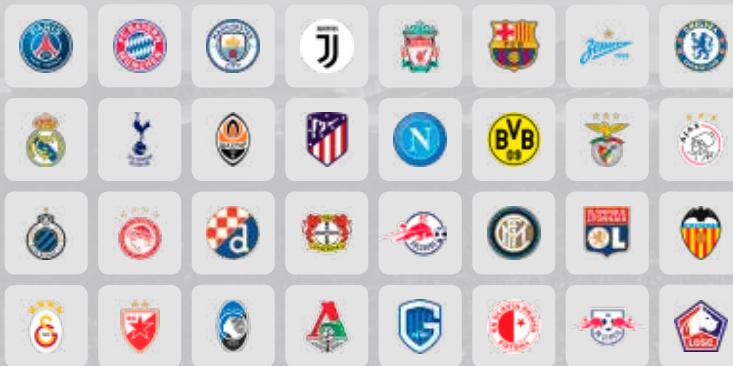


The many faces of European football in 2019/20

An overview of this season's group stage clubs



A B C D E F G H

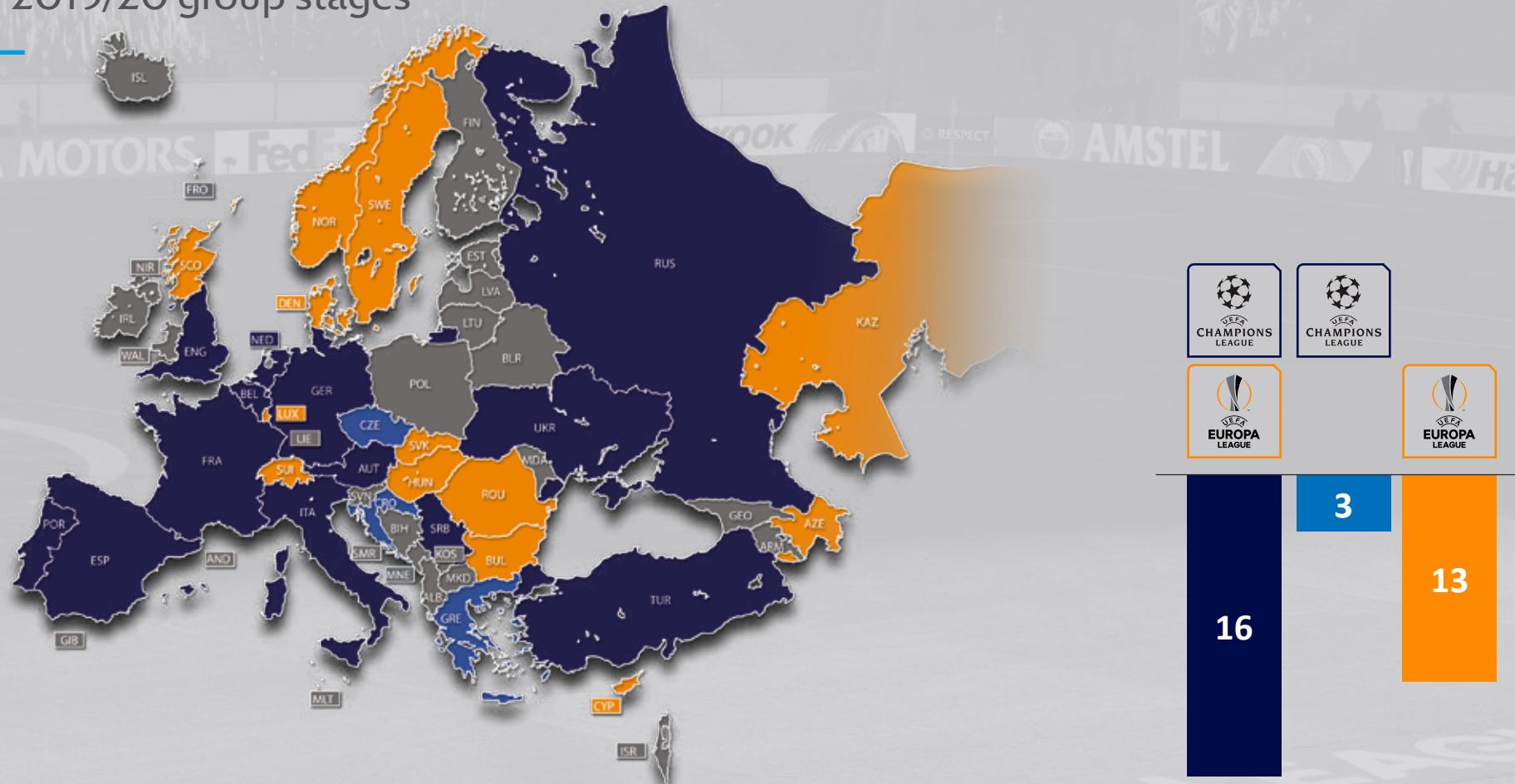


A B C D E F G H I J K L



Group stage clubs per country

More than half of UEFA member associations are represented by at least one club in the 2019/20 group stages



With the emergence of an additional UEFA club competition, even more clubs from more associations will compete on the European stage from 2021 onwards.

	AUT	AZE	BEL	BUL	CRO	CYP	CZE	DEN	ENG	ESP	FRA	GER	GRE	HUN	ITA	KAZ	LUX	NED	NOR	POR	ROU	RUS	SCO	SRB	SUI	SVK	SWE	TUR	UKR	TOTAL	
Clubs	1	2	2	1	1	1	1	3	4	4	3	4	1	1	2	1	1	3	1	1	4	2	2	1	3	1	1	3	2	48	
Qualifiers	2	1	2	1	1	1	1	1	3	3	2	3	1	1	2	1	1	3	1	1	4	1	2	2	1	3	1	1	3	2	48

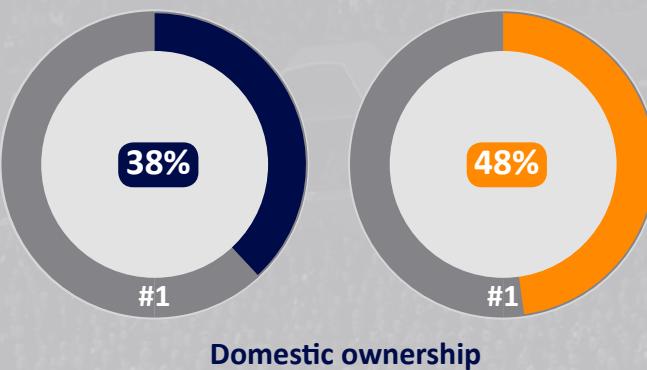
The owners behind this season's participants

The different ownership profiles per competition

UEFA Champions League participants



Domestic
of the UCL group stage clubs have a domestic ultimate controlling party, representing the largest form of ownership among UCL participants

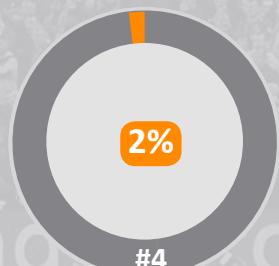
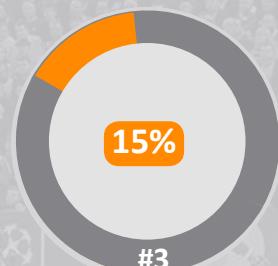
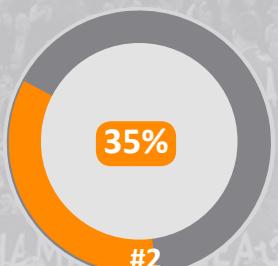
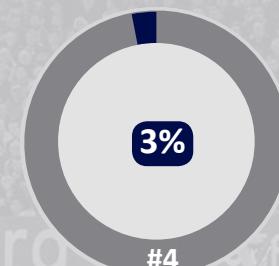
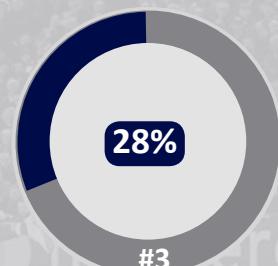


UEFA Europa League participants



Domestic
of the UEL group stage clubs have a domestic ultimate controlling party

Breakdown per ownership category



The owners behind this season's participants

Increasingly broad international ownership of clubs

4% 

of this season's group stage clubs have a different club owner than the previous season



0%



6%

26x 

different nationalities are represented by the owners of this season's group stage clubs



15x



20x

13% 

of this year's group stage clubs have a foreign investor who holds a minority share in the club*



16%



10%

14% 

of this season's group stage clubs have an ultimate controlling party from a non-UEFA territory



19%



10%

Transparency of football club finances

A first step towards making football more transparent in the future

For the first time on record clubs participating in UEFA competitions had to publish their financial information

88%



of clubs published an extensive set of financial statements (detailed balance sheet and profit & loss account)

12%



of clubs published a summary of their financial statements

61%



of the published financial statements were made accessible on the club's own communication channels

39%



of the financial statements were published by the clubs' licensors (national associations or leagues)

Overview of the clubs' latest financial results available

The 80 Group stage clubs posted a combined revenue of nearly €12bn and total assets of €24bn, with an aggregate squad value of €11.7bn^{**}

€11.7 bn



Aggregate revenue of the 80 group stage clubs, which represents 55% of the total revenue of European top division clubs



€7.8bn



€3.9bn

€24.1 bn



This season's group stage participants aggregate total assets*



€15.5bn



€8.6bn

62%



Average employee wages, expressed as a percentage of club revenues



61%



64%

€11.7 bn



Total cost of building a squad**, ranging from €270,000 to €953m



€8.5bn

Min €14.9m
Max €953m



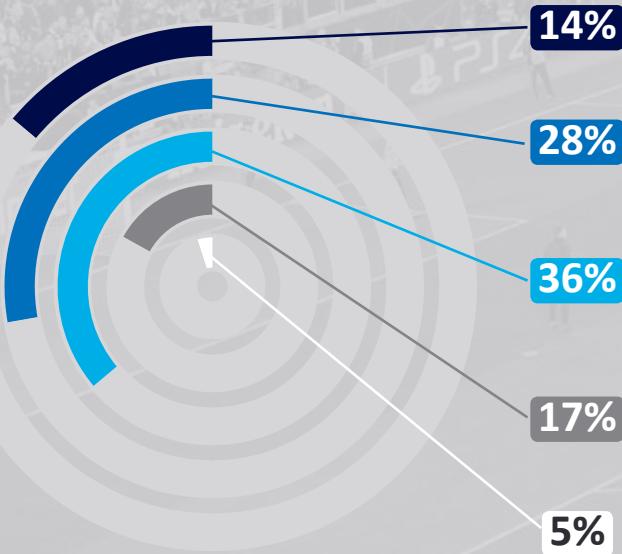
€3.2bn

Min €0.27m
Max €683m

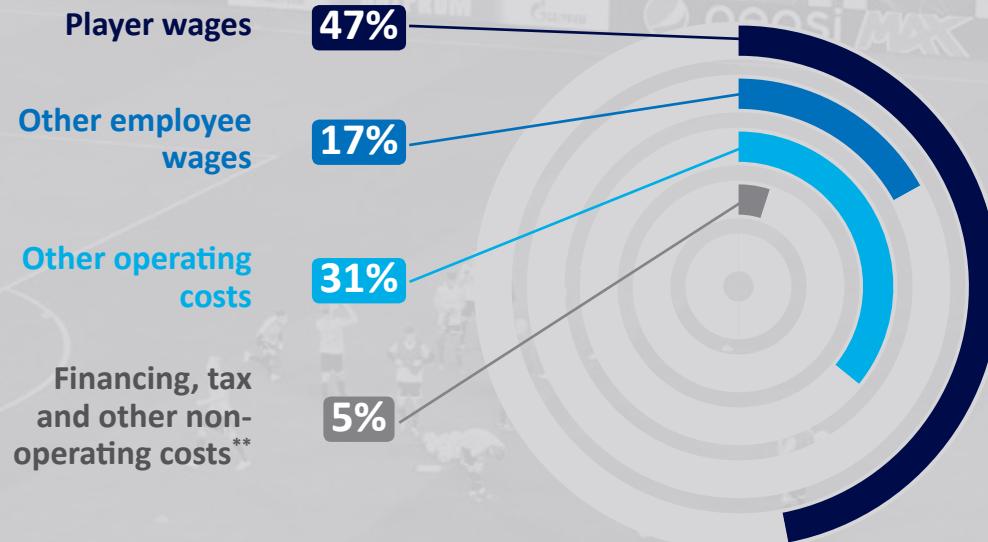
A breakdown of the 80 group stage clubs revenues and costs

On average, the clubs revenues are predominantly driven by sponsorship & commercial deals and broadcasting rights, while 64% of their total costs consists in wages (players and other employees)

Club revenue streams



Club costs split



*Reflects UEFA solidarity and prize money payments recorded over the latest fiscal year ending in Jun 2018 or December 2018. This level therefore reflects a season(s) when some clubs did not qualify for group stage payments.

**Including combined net transfer costs, gains and losses from transfer activities (-1% in FY18)

Revenues from UEFA in context

The 80 group stage clubs are expected to receive a total €2.5bn in the upcoming 2019/20 season



Estimated* prize money to be distributed to group stage clubs 2019/20

€2.5bn

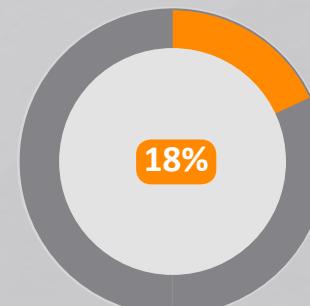
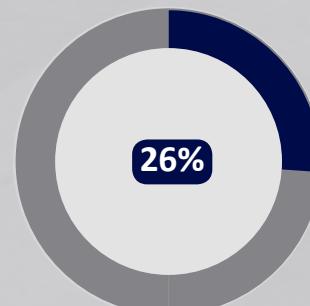


€1.9bn



€0.6bn

Forecast UEFA club competition share of total club revenues 2019/20**



*Exact amount determined after UEFA financial statements are closed and final revenues and costs are audited.

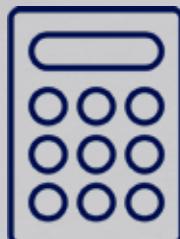
**The UEFA share of forecast aggregate club revenue' uses the latest financial figures of this year's 80 group stage clubs and assumes a 10% growth in non-UEFA club revenues between 2017/18 and 2019/20.

Costs and operating profitability: a snapshot of the 80 group stage clubs

The 80 group stage clubs posted a positive operating profit margin, with player wages accounting for half of their operating costs basis



7.0%



average operating profit margin

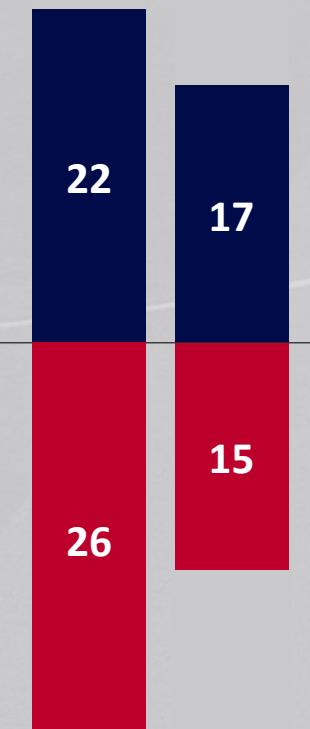


817m

cumulative operating profit of the 80 group stage clubs



Number of club posting ...



Positive operating result

Negative operating result

This summer's transfer activity for the 80 group stage clubs

In total, the clubs spent almost €4.0bn in transfers over the summer 2019 window

58%



The clubs were responsible for 58% of all global transfer spending* (€6.9bn)

€3,980m

Estimated summer 2019 transfer spend



55%

Higher spend than summer 2018

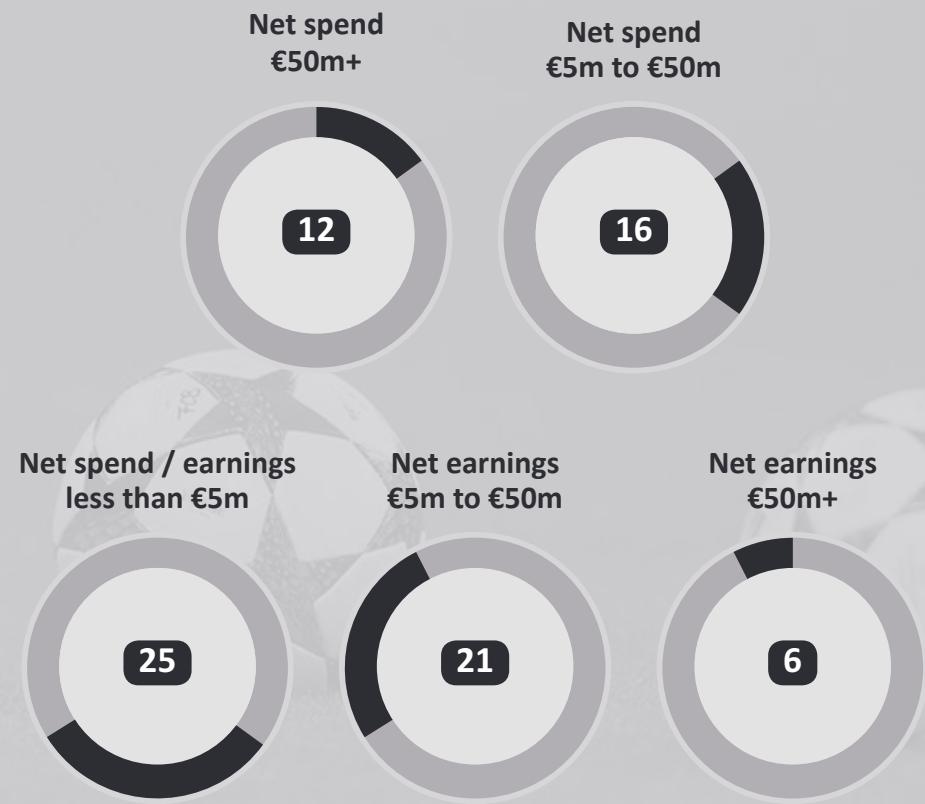
Estimated summer 2019 transfer earnings

€3,720m



Summer 2019 transfer profile

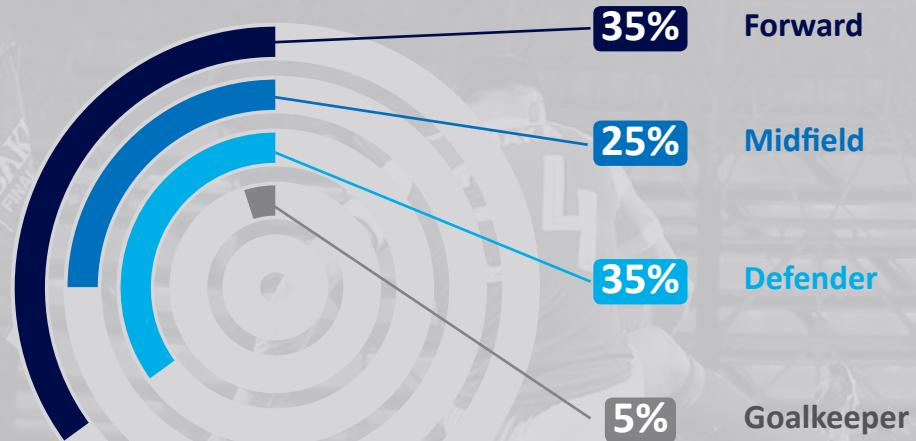
number of clubs



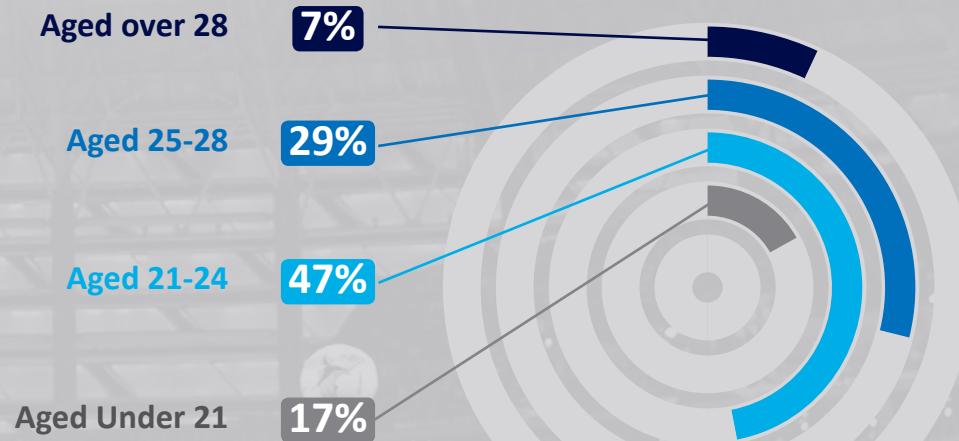
A breakdown of transfer spend by position and age group of players

A record 64% of the overall spending was made on players 24 and under years old, while clubs spent an equivalent amount on defenders and forwards

Transfer spend by player type



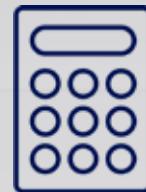
Transfer spend by age group



Insights on summer 2019 transfers

Transfers value is highly concentrated within UEFA boundaries, with almost half the clubs having made a club record signing this summer

43%



of clubs have made their club record signing this summer



47%



40%

96%



of group stage club transfer business* was with another European club



97%



95%

55%



share of transfer spending on expatriate (non-national) players



55%



54%

69%



share of transfer spending with foreign clubs (International)



69%



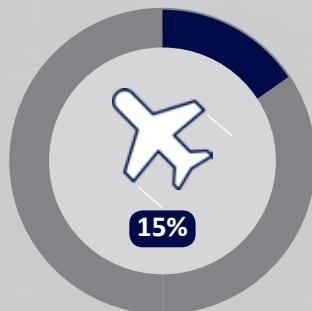
67%

This season's primary shirt sponsors

An overview of the various shirt sponsors that feature on the front of this season's shirts

Top 3 industries by primary shirt sponsors

Airline & Automotive



Gambling



Retail



23%



of clubs feature a primary shirt sponsor from a non-UEFA territory, highlighting the global appeal of European football

21%



of clubs introduced a new primary shirt sponsor for this season

4x



This season's kit manufacturers

An overview of the various brands that have manufactured the football shirts of this season's clubs

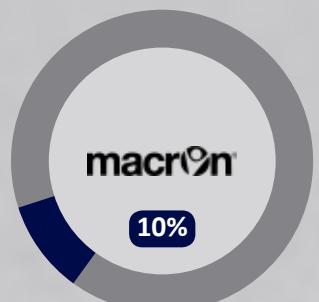
Number of different kit manufacturers per competition



16x

different kit manufacturers will feature on the main kits of the 80 clubs participating in the 2019/20 UEFA competition group stages

Top 4 kit manufacturers across the participating clubs

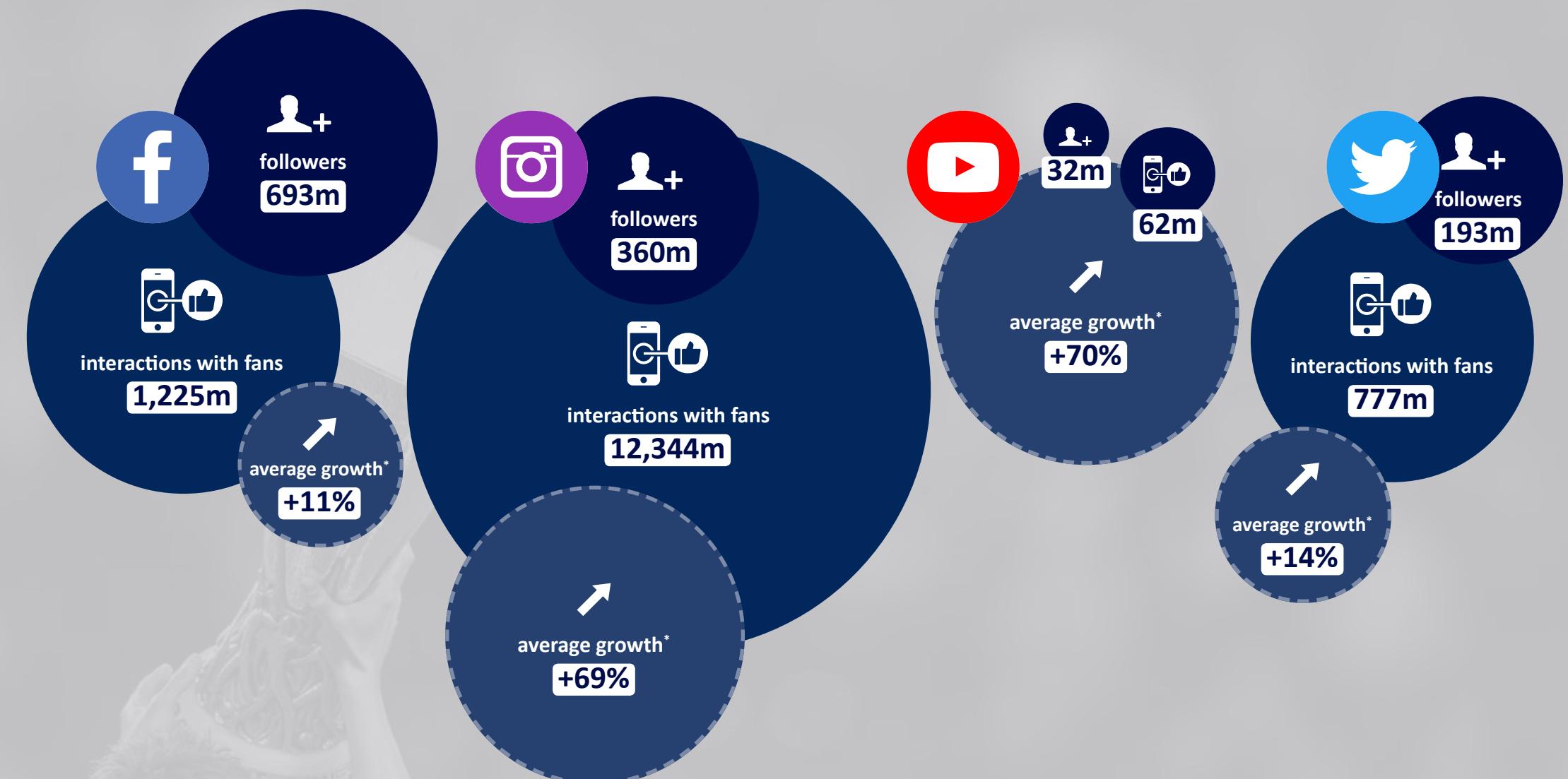


9% 

of the qualified clubs introduced a new kit manufacturer for this season

The 80 group stage clubs are more popular than ever on social media

1.3 billion followers across the 4 main social media platforms ; Instagram is the fastest growing platform with Youtube, yet Instagram generates the most interactions with fans



Social media: following and engagement

The 80 Group Stage clubs recorded 8.4 billion social media interactions (likes, shares or comments) between June 2018 and 2019

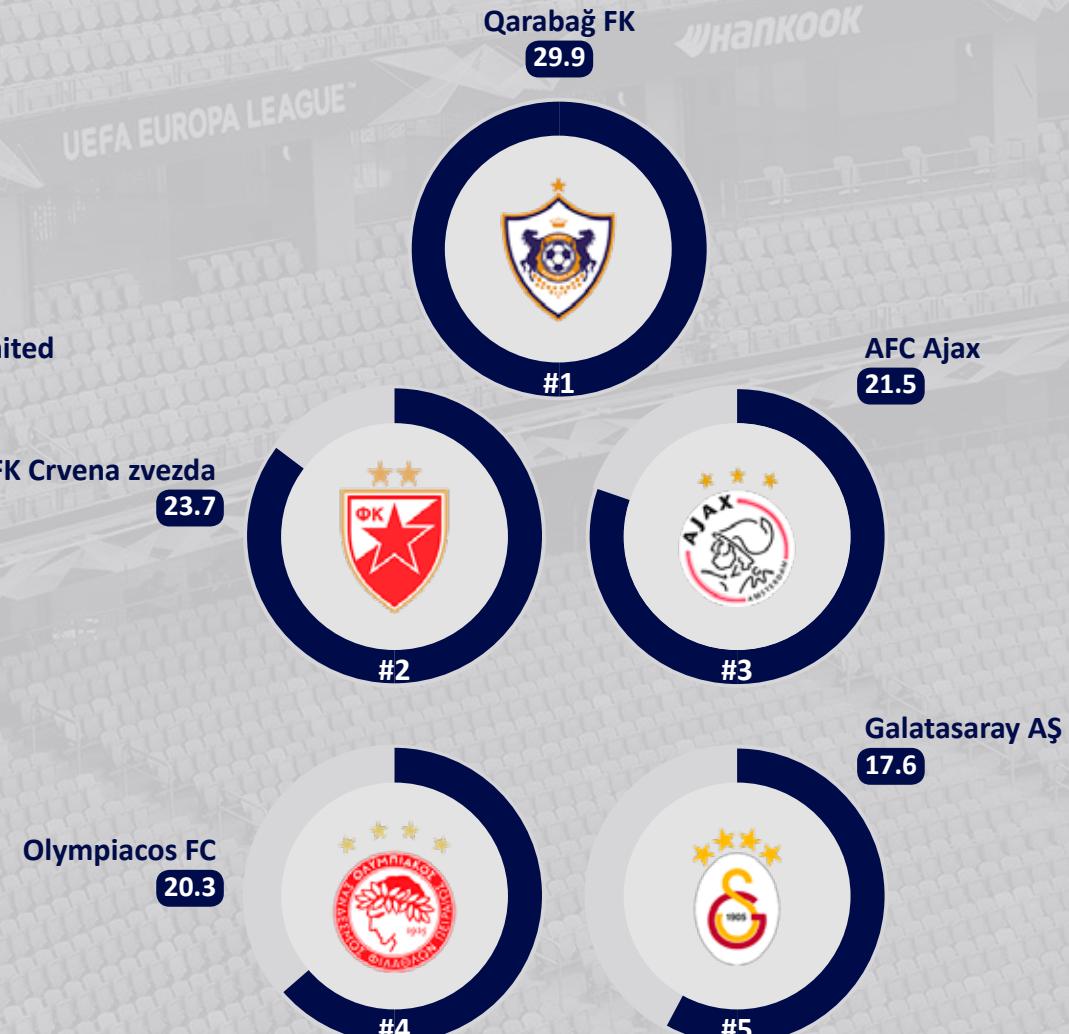
Top 5 clubs with biggest social media following

followers*



Top 5 clubs with most intense fan engagement**

average interactions per follower



Note: Number of followers in July 2019

*Combined total followers on Facebook, Instagram, YouTube and Twitter in July 2019

**Average number of interactions per follower

Biggest markets for group stage club website traffic

Two thirds of website traffic come from overseas

Top 5 clubs for domestic traffic*

unique visitors per month



Top 5 clubs for non-domestic traffic*

unique visitors per month



An overview of club websites traffic

European countries remain the major traffic providers to clubs websites

Top 10 countries for traffic*

Europe

Outside Europe

United Kingdom

3,643K



Germany

2,198K



Spain

1,641K



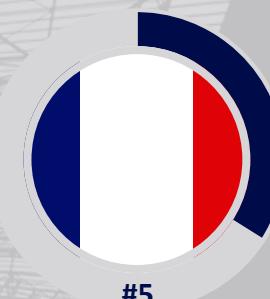
Italy

1,458K



France

1,234K



Russia

1,227K



Turkey

899K



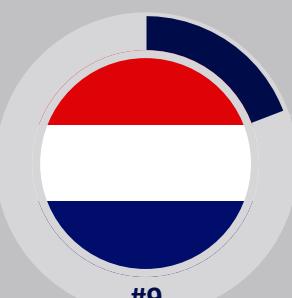
Portugal

803K



Netherlands

702K



Poland

672K



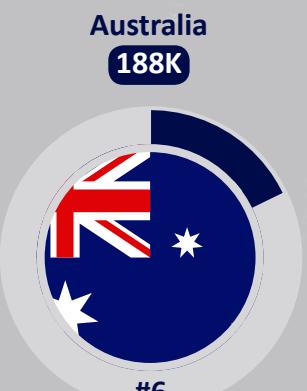
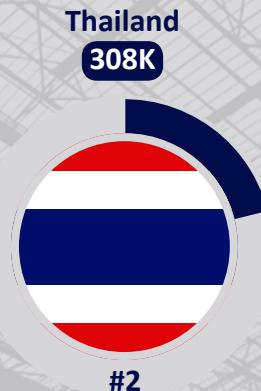
An overview of club websites traffic

The US remains a major traffic provider, while big markets emerge in Asia and Africa

Top 10 countries for traffic*

Europe

Outside Europe



A breakdown of the stadiums to be used during the 2019/20 season

The 80 group stage clubs invested just under €1billion in club facilities in the last financial year*



Average stadium capacity
for the 2019/20 UEFA group stages

Amount invested by participants in club
facilities in the last twelve months



Percentage of 2019/20 group stage participants owning their stadium



Percentage of the stadiums to be used in the 2019/20 UEFA competitions group stages
that have been constructed, rebuilt or significantly upgraded in the last 10 years**



*"Amount invested" refers to new fixed asset additions in the last financial year as per club audited financial statements.

**Significant upgrades only contain renovations that impact the stadium capacity with more than 10%. In addition to the number presented, 6 stadiums are currently undergoing significant upgrades or are in the middle of being replaced by new stadiums/ rebuild stadiums in the next years.

Top 10 stadiums by UEFA capacity

The group stages will feature 24 different stadiums of 50,000+ with an average capacity of 41,278



Camp Nou
98,679



Estadio San Bernabéu
78,346



Stadio San Siro
78,275



Old Trafford
73,538



Arena München
70,000



Stadio Olimpico
68,530



NSK Olimpiysjy
68,000



Estadio Metropolitano
67,872



Stadion Dortmund
66,099



Estádio do SL Benfica
64,162

Head coaches: demographics and history

An overview of the various head coaches that will be coaching the 80 group stage clubs

50% 

of this season's group stage clubs have changed
their head coach in the last 12 months



38%



60%

38% 

of this season's clubs have
foreign head coaches



41%



35%

48.6 

is the average age of the first team head coaches
that participate in this season's group stages



50.8



47.2

6% 

of the head coaches in this season's group stages
have been in their job for at least five years



6%



6%

Head coach nationalities

An overview of the various head coaches that will be coaching the 2019/20 UEFA group stage participants

4x 

clubs in this season's group stages have appointed a head coach from a non-UEFA territory

15x 

coaching debutants in this season's UEFA Europa League group stages



9x 

coaching debutants in this season's UEFA Champions League group stages





Production

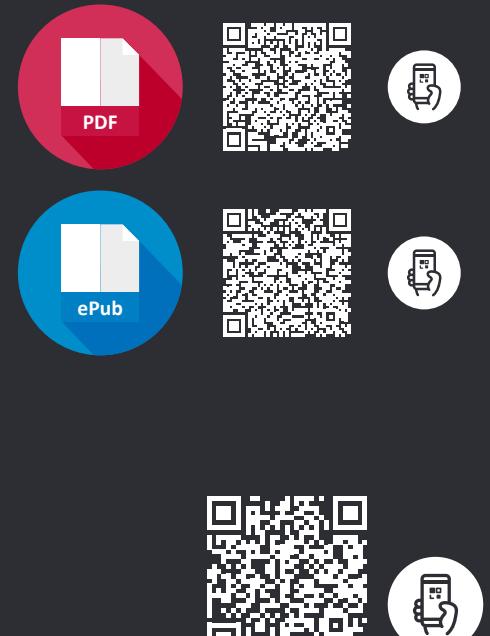
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