



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

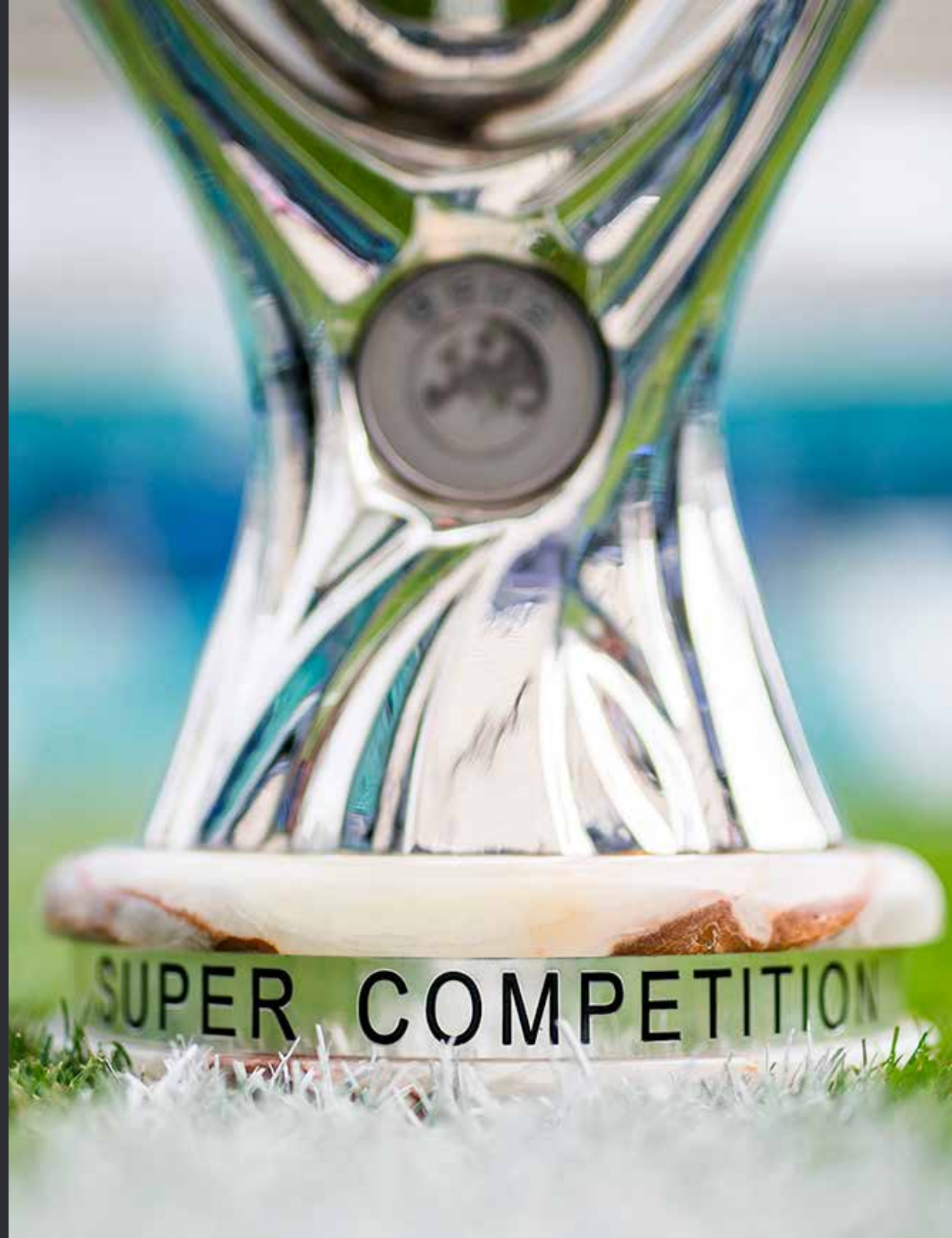
THE BIGGEST AND THE BEST

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*

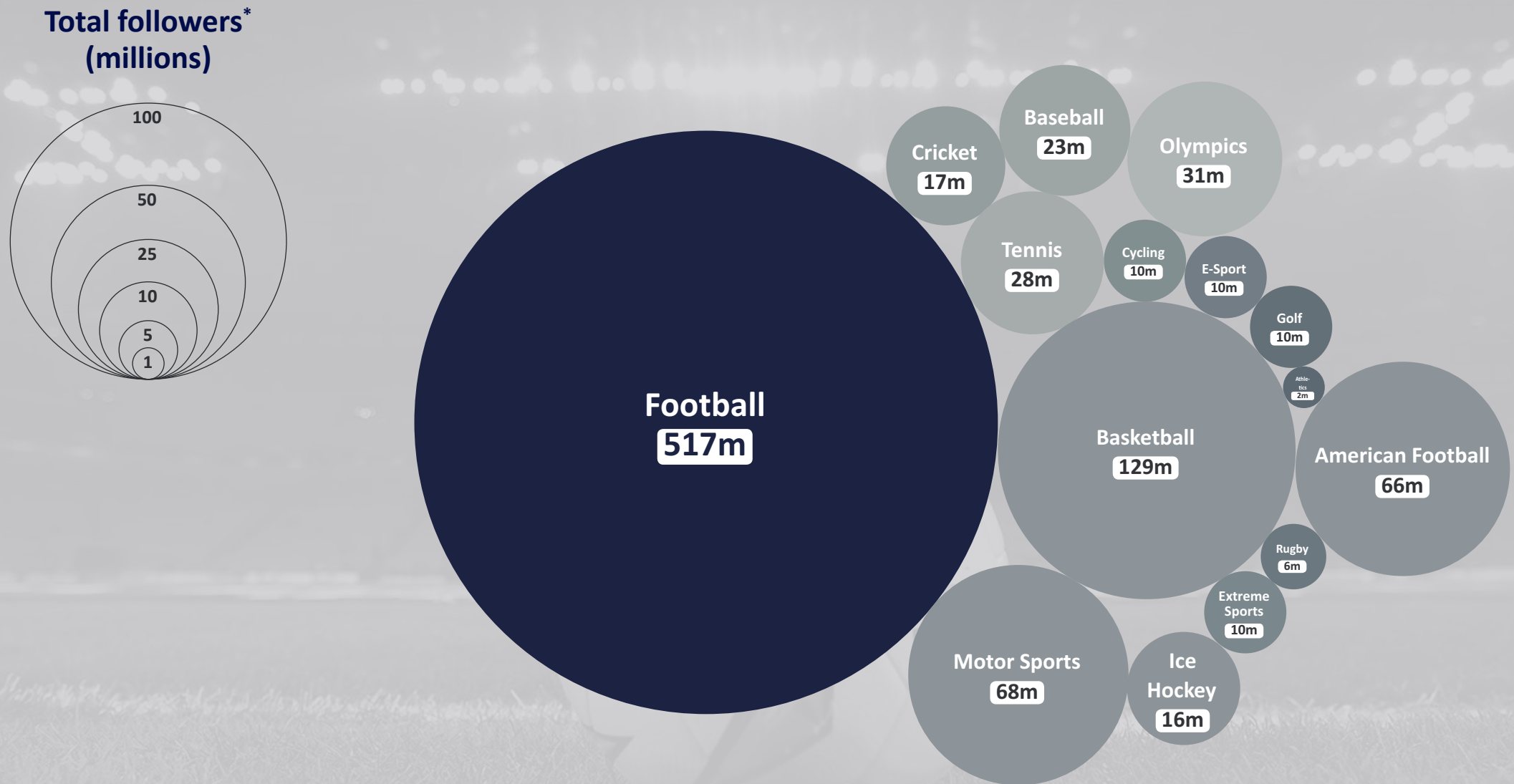


*Ranked by aggregate number of followers on Facebook, Instagram, YouTube and Twitter in July 2019. UEFA.tv YouTube account followers prorated across main UEFA competitions.

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

Football competitions are the most popular in the world

A combined global audience of more than half a billion fans



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

B

THE JOURNEY TO THIS SEASON'S GROUP STAGES

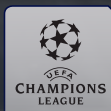
This second chapter illustrates the various qualifying routes into the UEFA Champions League and Europa League group stages.

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

15 ... Most successful clubs

11 ... Points

16 ... New faces

12 ... Goals

17 ... Entry stages

13 ... Attendances

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

*In the annual UEFA Benchmarking report, also called "The European Club Footballing Landscape", the UEFA Intelligence Centre presents a full picture of all 716 club

**The number of cup participants does not include any preliminary rounds such as regional or provincial qualifying 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

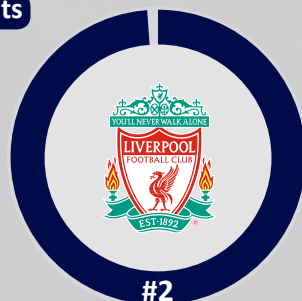
Manchester City FC

98 points



Liverpool FC

97 points



GNK Dinamo Zagreb

92 points



BSC Young Boys

91 points



Paris Saint-Germain

91 points



Top 5 clubs with highest average points per game

HB Tórshavn

ø 2.70 points



FC Shakhtar Donetsk

ø 2.59 points



PAOK FC
ø 2.67 points



SL Benfica

ø 2.57 points



Manchester City FC

ø 2.58 points



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



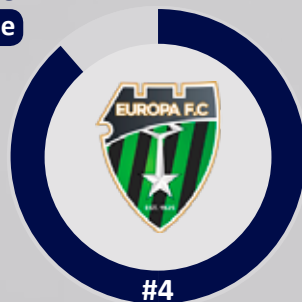
FC Flora Tallinn
3.22 per game



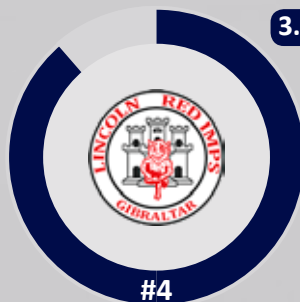
Nõmme Kalju FC
3.17 per game



Europa FC
3.11 per game



Lincoln Red Imps FC
3.11 per game

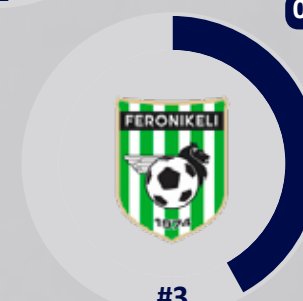


Top 5 clubs with lowest goals conceded

FC Shakhtar Donetsk
0.34 per game



KF Feronikeli
0.42 per game



FC Prishtina
0.36 per game



PAOK FC
0.47 per game



FC Shakhtyor Soligorsk
0.47 per game



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



Borussia Dortmund
1.37M



FC Barcelona
+171K



SS Lazio
+118K



Manchester United FC
1.42M



FC Bayern München
1.28M



Real Madrid CF
1.15M



Olympiacos FC
+106K



FC Dynamo Kyiv
+91K



*Aggregate domestic league matchday attendances.

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

Top 7 participating clubs with most European titles*

Real Madrid CF

15 titles



FC Barcelona

9 titles



Liverpool FC

9 titles



FC Bayern München

7 titles



FC Ajax

6 titles



FC Internazionale Milano

6 titles



FC Juventus

6 titles



Top 5 participating clubs with most domestic trophies**

Linfield FC

96 titles



Celtic FC

90 titles



Rangers FC

87 titles



Olympiacos FC

71 titles



SL Benfica

66 titles***



*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

* FC Vitebsk participated in the UEFA Intertoto Cup (1999) and the UEFA Cup Winners Cup (1998/99) and KS Lechia Gdansk participated in the UEFA Cup Winners Cup (1983/84)

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 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 Europa League


EUROPEAN ROAD
to participation



The 2019/20 UEFA club competition qualifying stages

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

EUROPEAN ROAD
to participation

10_x 

qualifying ties
were decided in extra time

7_x 

qualifying ties
were decided by a penalty shoot-out

20_x 

qualifying ties
were decided by the away goals rule

9_x 

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

*The abovementioned figure does not include the ten clubs that entered the UEFA Europa League group stage automatically after being eliminated from UEFA Champions League qualifying.

C

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.

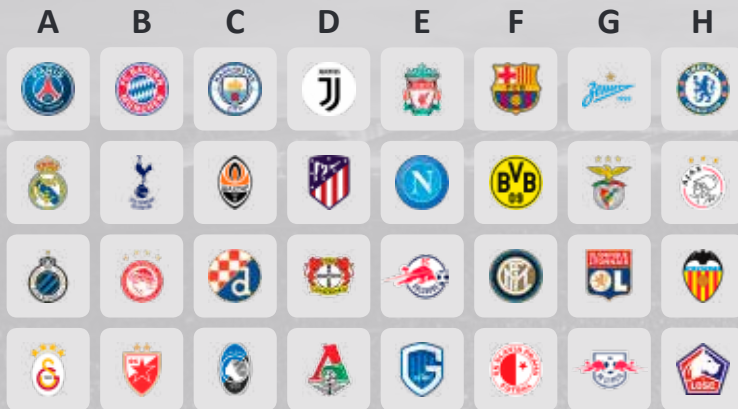
We examine a range of topics, providing an overview of the landscape using the latest sporting and financial data.

- 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



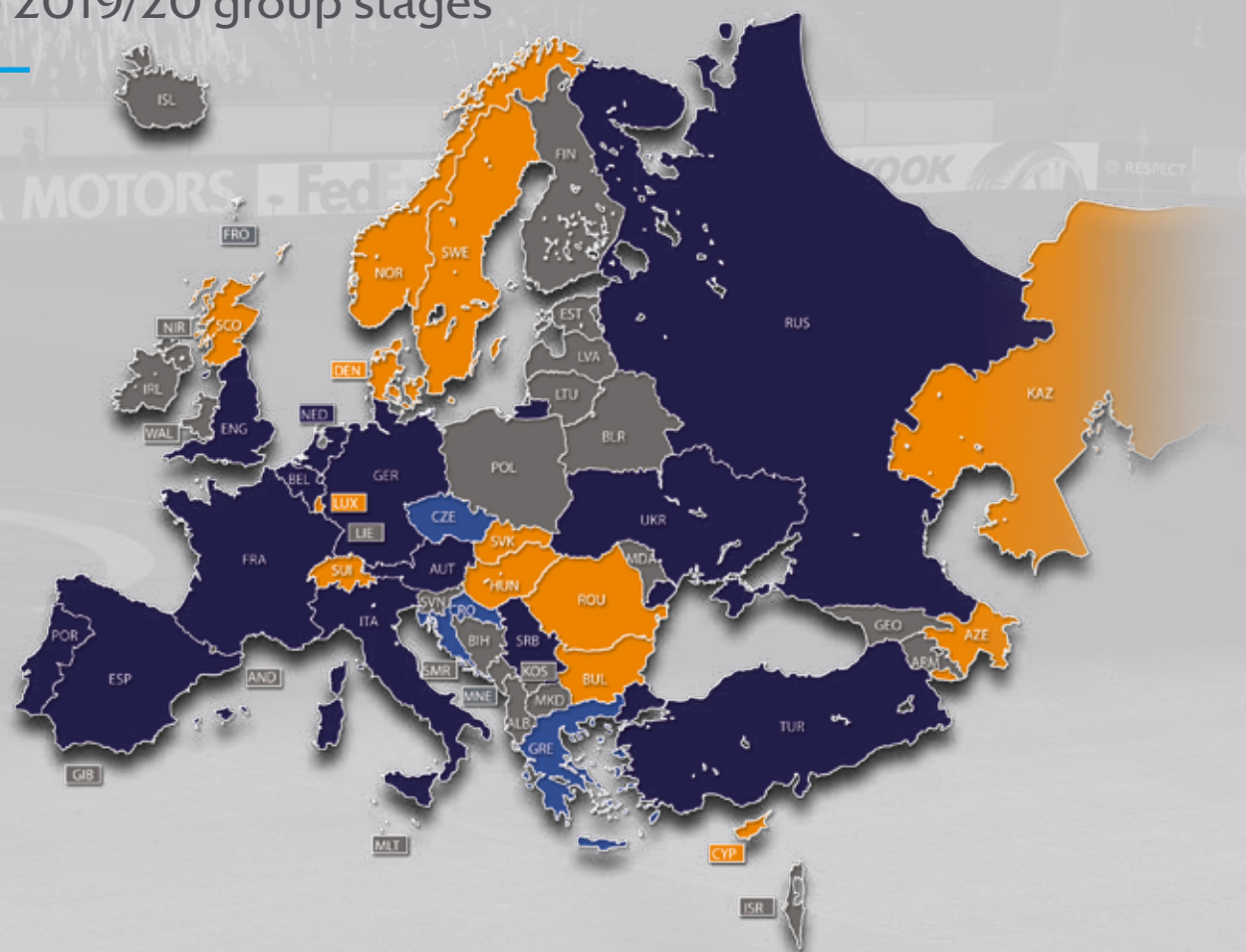
The many faces of European football in 2019/20

An overview of this season's group stage clubs













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	
	1		2		1		1		4	4	3	4	1		4			1		1		2		1			1	1	32	
	2	1	2	1		1		1	3	3	2	3		1	2	1	1	3	1	4	1	2	2	1	3	1	1	3	2	48

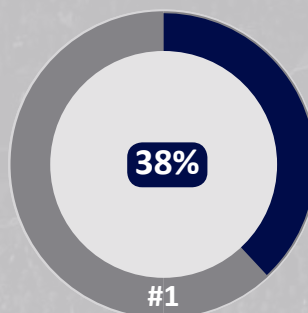
The owners behind this season's participants

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

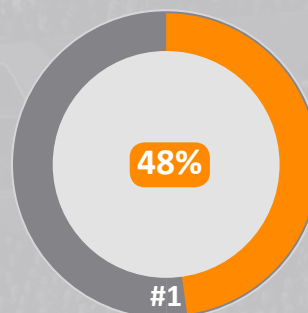


Domestic ownership

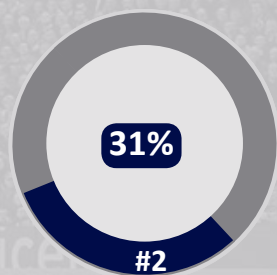


UEFA Europa League participants

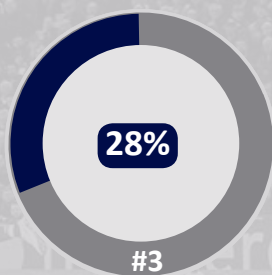
Domestic
of the UEL group stage clubs have a domestic ultimate controlling party



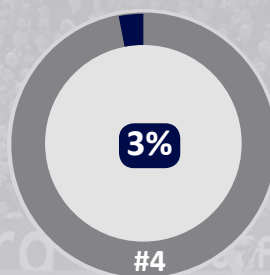
Breakdown per ownership category



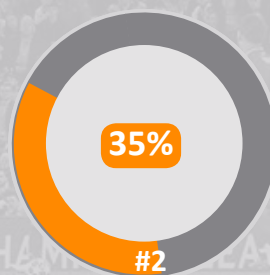
Associations



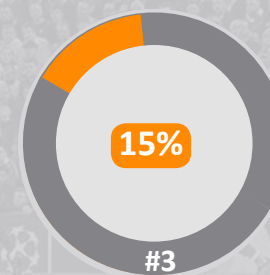
Foreign ownership



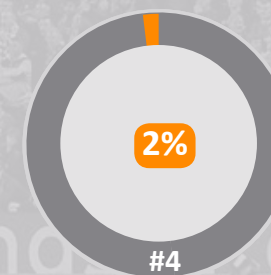
Public ownership*



Associations



Foreign ownership



Public ownership*

*The clubs listed as public ownership are owned by a governmental/ state organisation

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



13% 

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



26x 

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



14% 

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



* This figure only takes into account investors who hold a minority share of more than 10% and less than 50%

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

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)

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

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**

€11.7bn 

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



62% 

Average employee wages, expressed as a percentage of club revenues



€24.1bn 

This season's group stage participants aggregate total assets*



€11.7bn 

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



Note: Financials based on clubs' latest available disclosure to UEFA for the fiscal Year ending either June 30, 2018 or December 31, 2017.

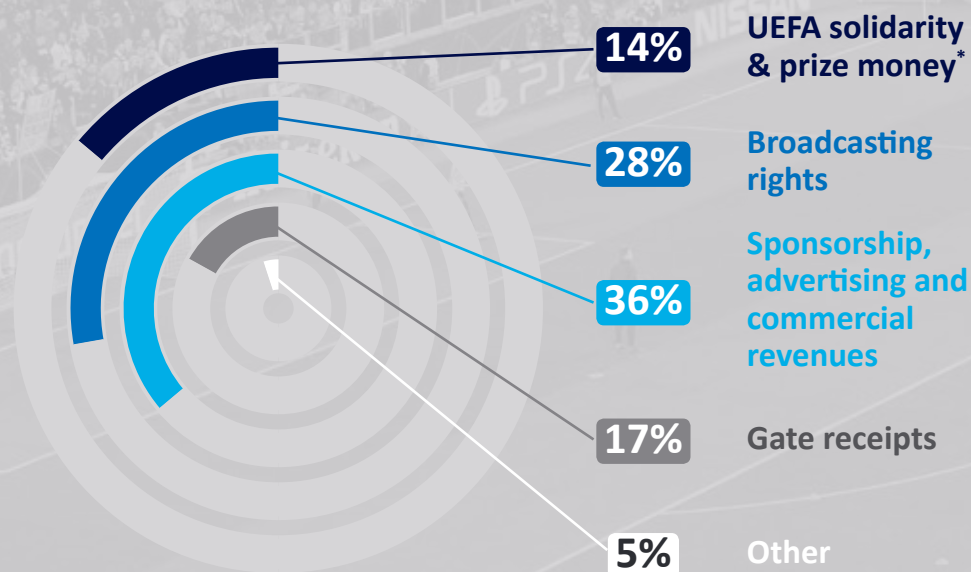
*Including players' registrations as intangible assets

**Purchase value of squad (transfer fees) as of September 9th 2019, excluding intermediary fees, based on UEFA Intelligence Centre composite transfer database

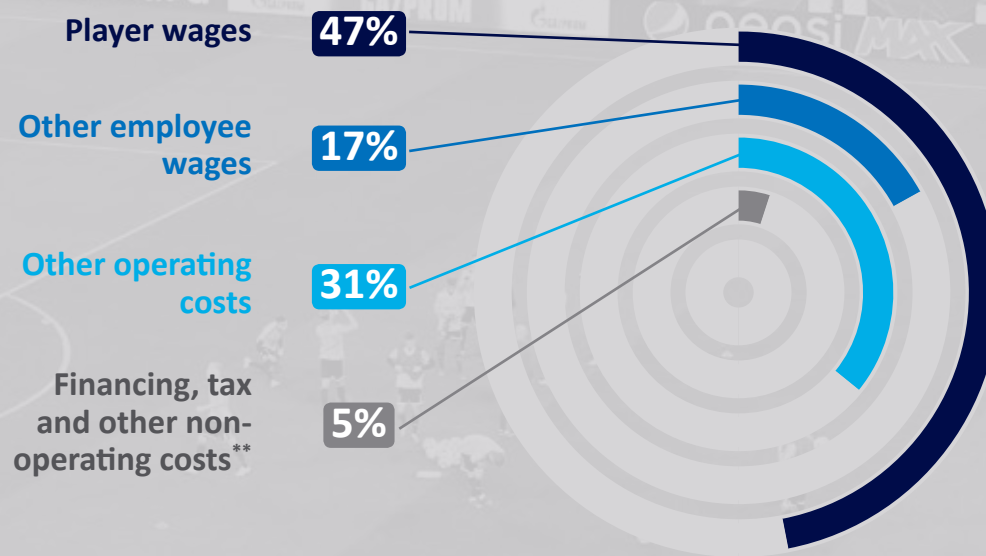
A breakdown of the 80 group stage clubs revenues and costs

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 received a total €2.5bn in the upcoming 2019/20 season



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

€2.5bn

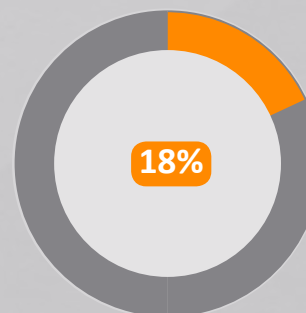
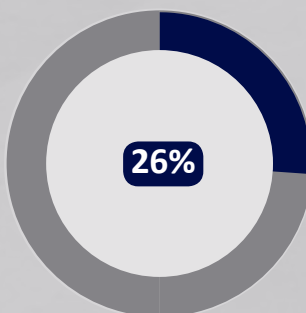


€1.9bn



€0.6bn

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



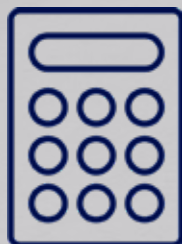
*Exact amount determined after UEFA financial statements are closed and final revenues and costs are audited.

**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



8.5%



4.0%

Number of
club posting ...

22

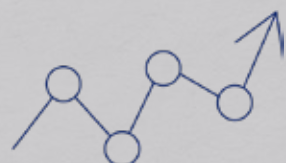
17

Positive operating result

Negative operating result

26

15



817_m

cumulative operating profit
of the 80 group stage clubs



€663m



€154m

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

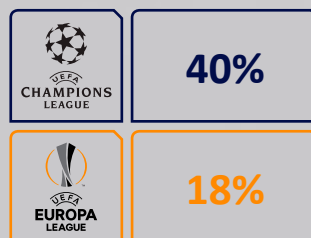
Estimated summer 2019 transfer spend



55% Higher spend than summer 2018

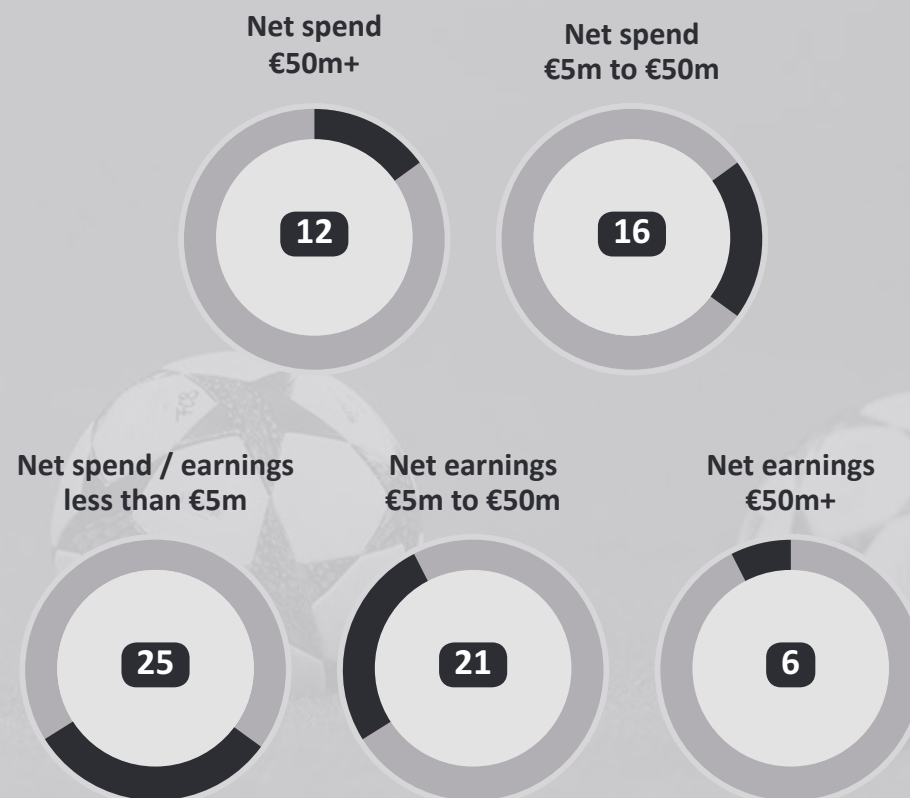
Estimated summer 2019 transfer earnings

€3,720m



Summer 2019 transfer profile

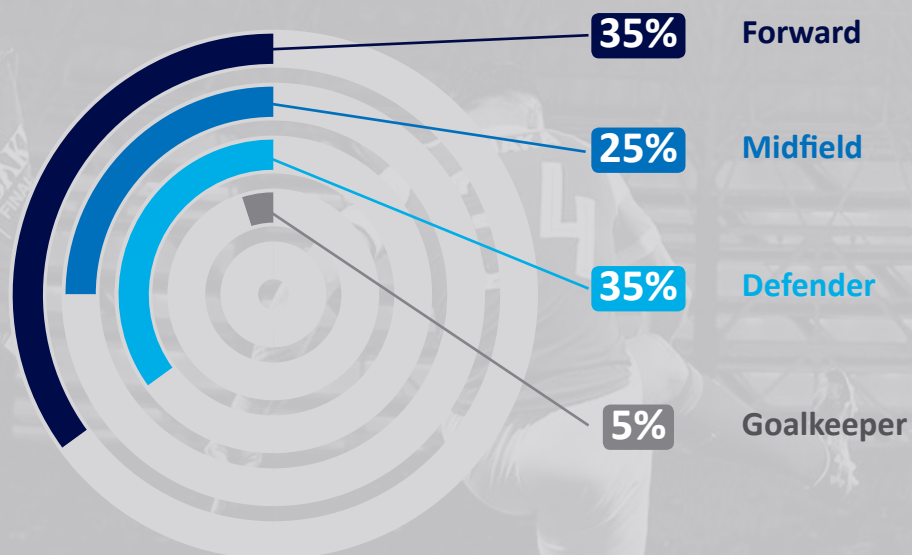
number of clubs



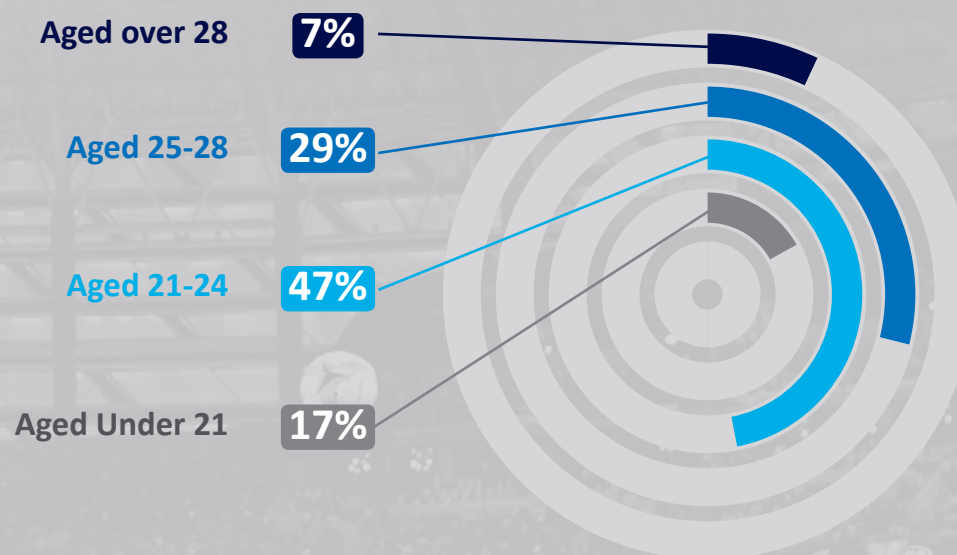
A breakdown of transfer spend by position and age group of players

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%

55% 

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



55%



54%

96% 

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



97%



95%

69% 

share of transfer spending with foreign clubs (International)



69%



67%

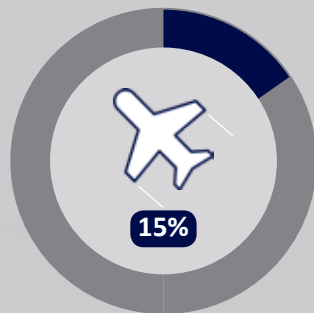
*'Transfer business' is a term covering both inbound and outbound transfer fees.

This season's primary shirt sponsors

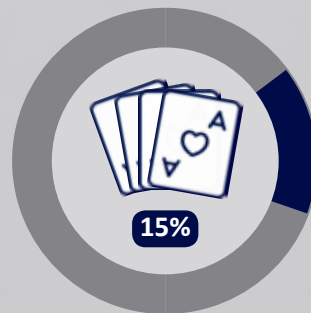
An overview of the various shirt sponsors that feature on the front of this season's shirts

Top 3 industries by primary shirt sponsors

Airline & Automotive



Gambling



Retail



4x



brands are the primary sponsor on more than one club's shirt, demonstrating the depth and breadth of sponsors overall

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

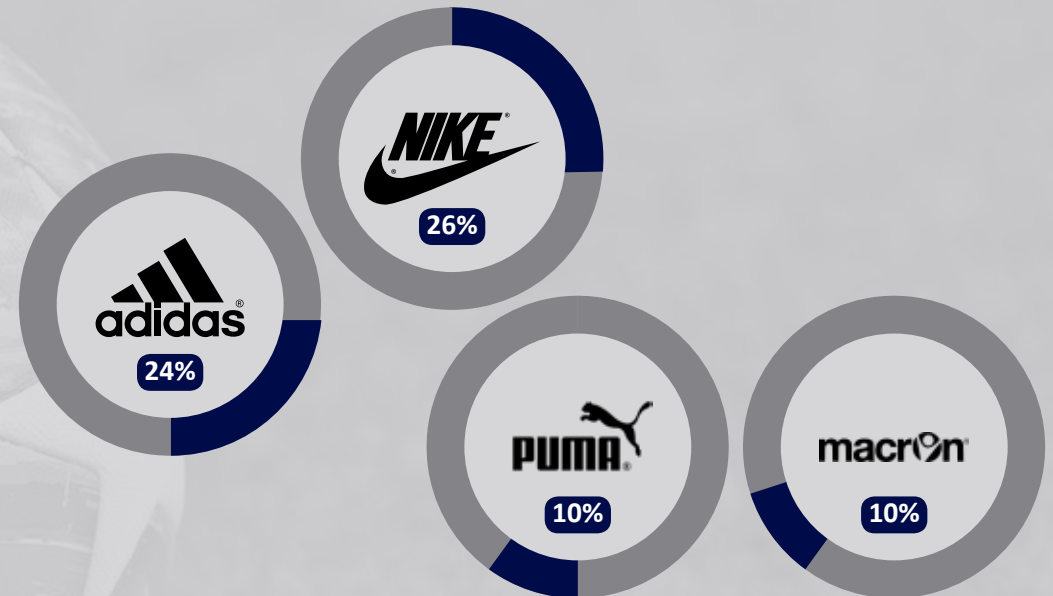
This season's kit manufacturers

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

Number of different kit manufacturers per competition




Top 4 kit manufacturers across the participating clubs



16x 

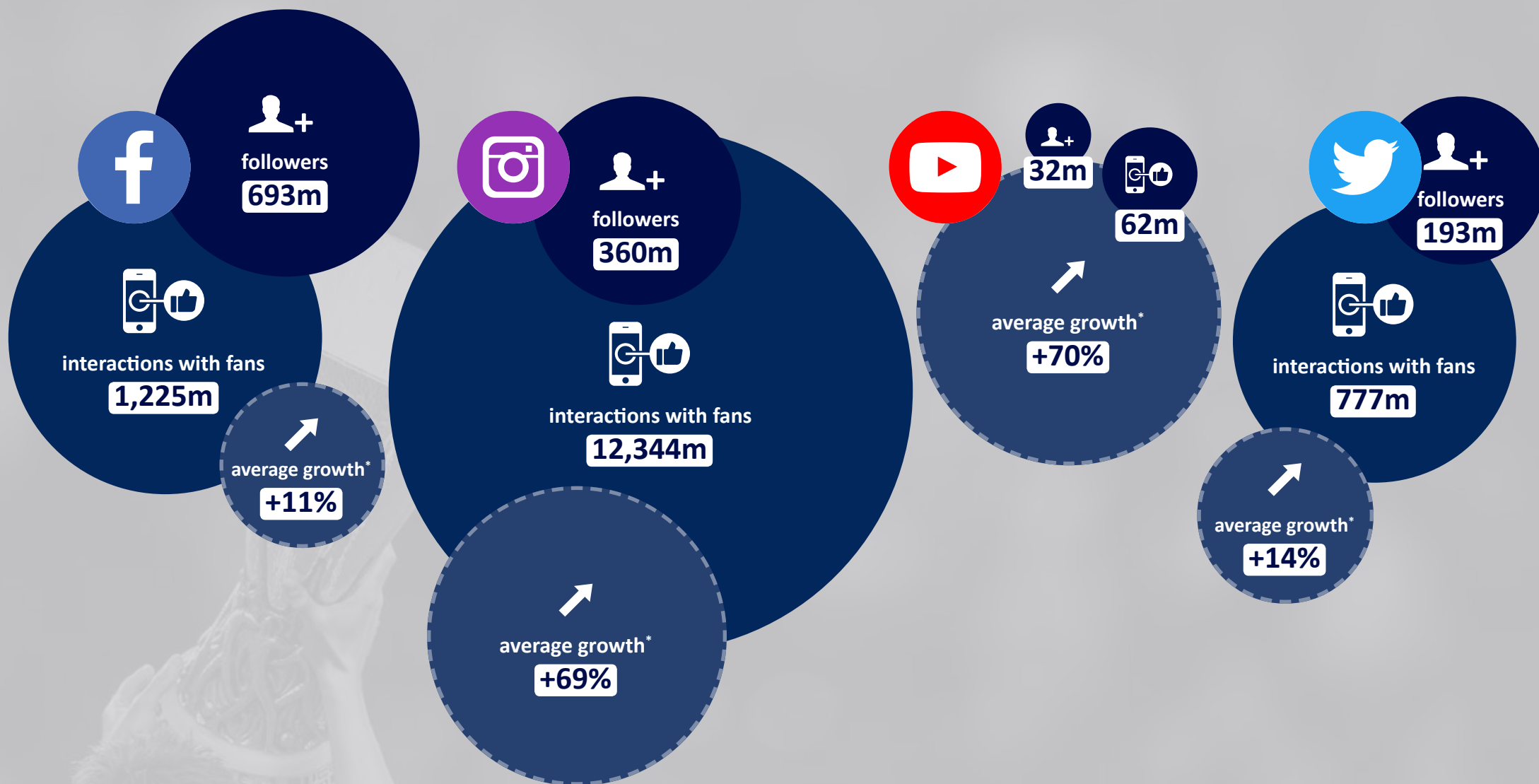
different kit manufacturers will feature on the main kits of the 80 clubs participating in the 2019/20 UEFA competition group stages

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



Note: Figures as of July 2019
*Excluding outliers (growth numbers above 500%)

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

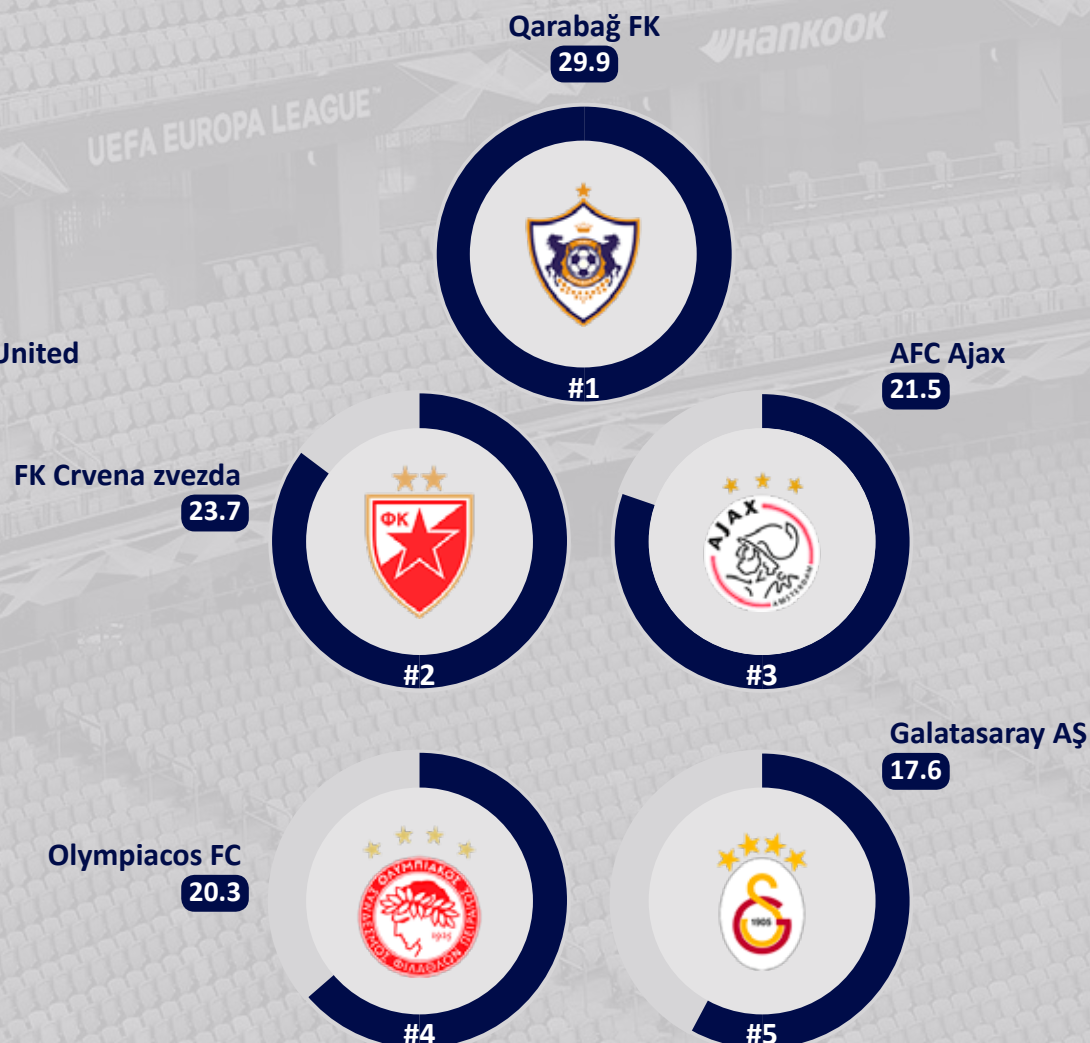
Top 5 clubs with biggest social media following

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



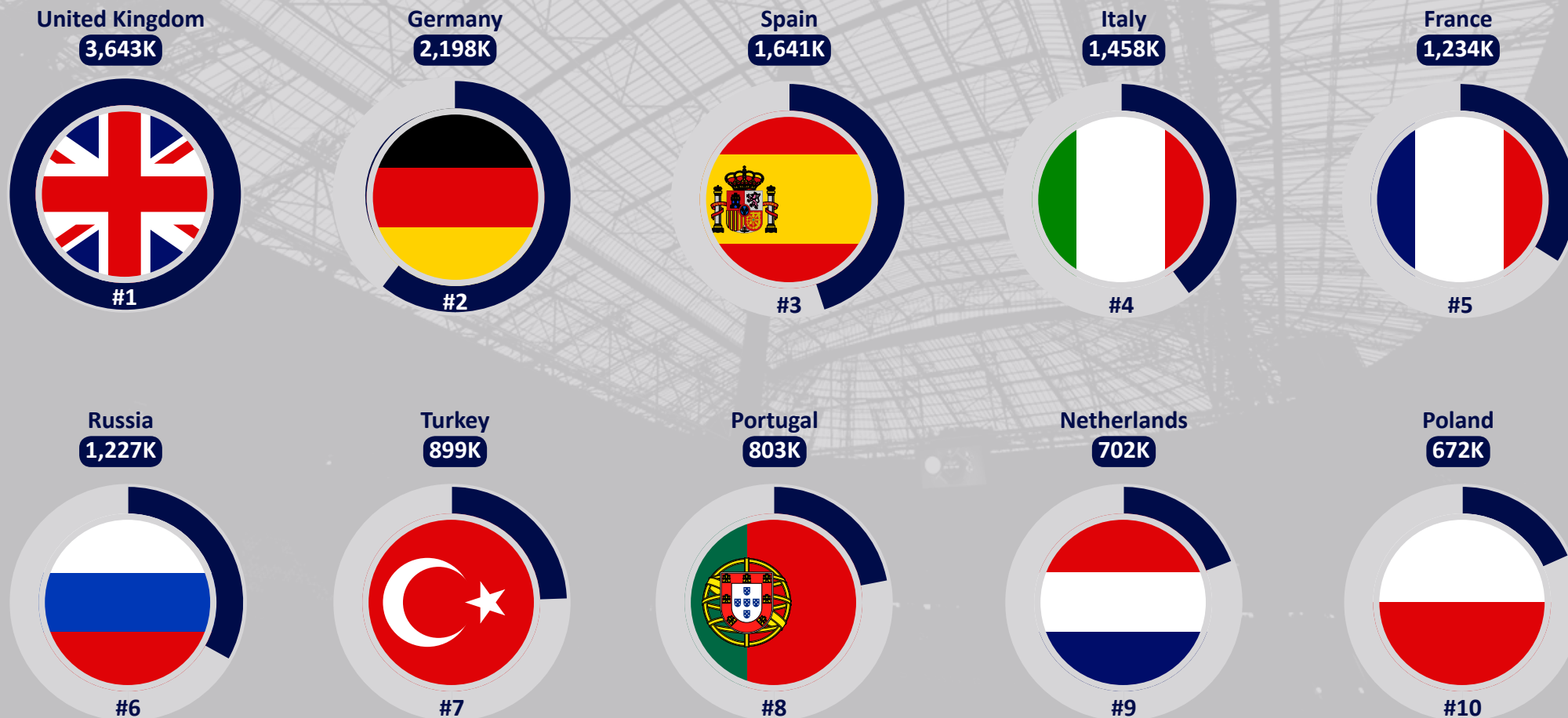
An overview of club websites traffic

European countries remain the major traffic providers to clubs websites

Top 10 countries for traffic*

Europe

Outside Europe



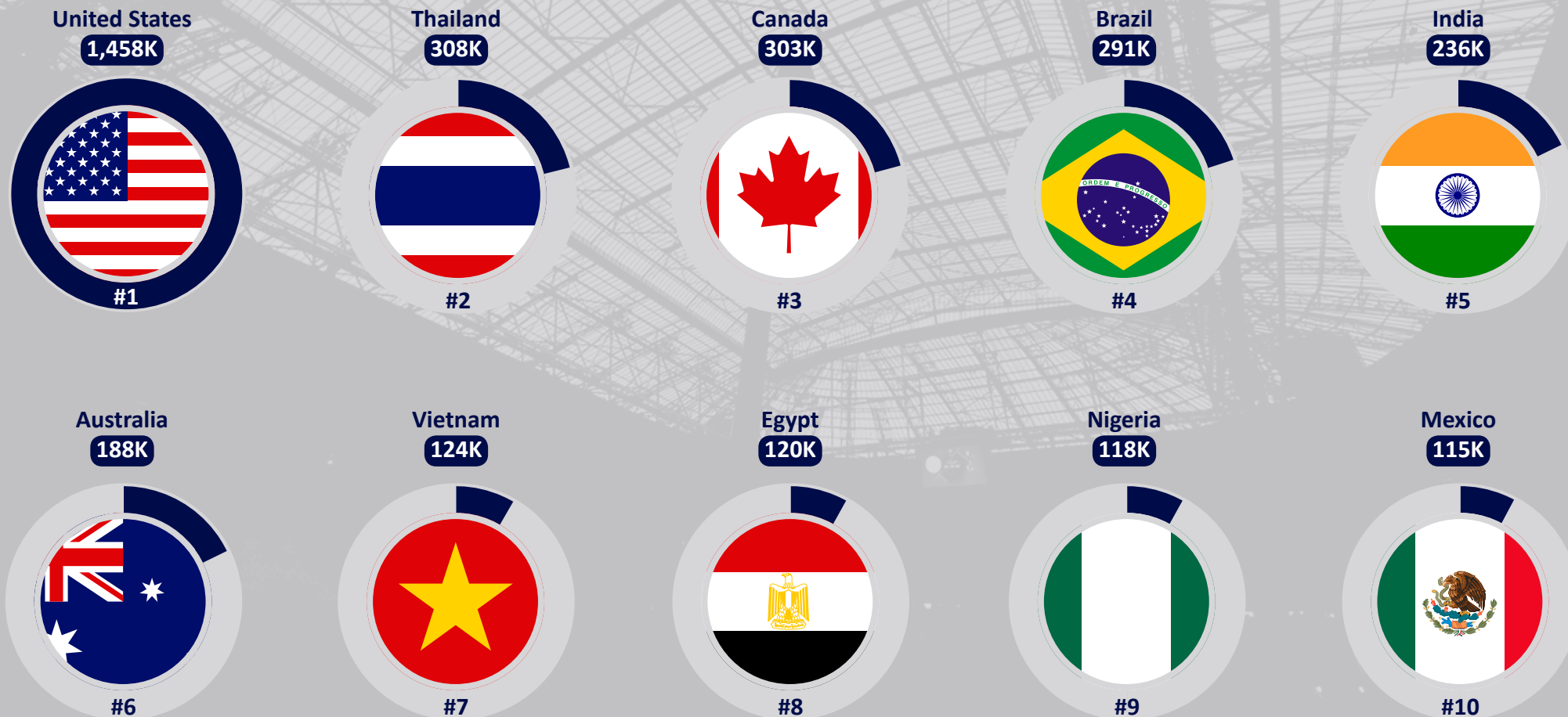
An overview of club websites traffic

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*



51,097

Average stadium capacity
for the 2019/20 UEFA group stages

34,732



€839m

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

€132m

Percentage of 2019/20 group stage participants owning their stadium

59%



40%

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**

38%



33%

*"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 Olimpiysjji
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% 

of this season's clubs have foreign head coaches



48.6 

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



6% 

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



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





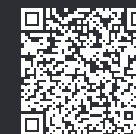
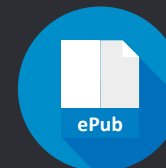
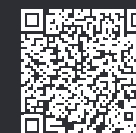
Production

Financial Sustainability & Research Division / UEFA Intelligence Centre

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