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DEMOGRAPHIC S T U D Y

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About the CIES Football Observatory

The CIES Football Observatory is a unique project initiated in 2005 by Drs Raffaele Poli and Loïc Ravenel under the name of the Professional Football Players Observatory (PFPO). Since 2011 it is one of the cornerstones of the broader CIES Sports Observatory project, dedicated to the statistical analysis of sport in all its diversity.

Two annual reports are published for football. In January, the Demographic Study presents an in-depth analysis of club composition and player characteristics in 31 top division leagues of UEFA member countries. In June, the Annual Review analyses clubs and players in the big-5 European leagues from a demographic, economic and pitch performance perspective.

Methodological rigour coupled with a deep knowledge of football guarantee high quality analyses at competitive rates.

For more information: www.football-observatory.com

About the CIES

The International Centre for Sports Studies (CIES) is an independent study centre located in Neuchâtel, Switzerland. It was created in 1995 as a joint venture between the Fédération Internationale de Football Association (FIFA), the University of Neuchâtel, the City and State of Neuchâtel.

Using a multi-disciplinary approach CIES provides research, top-level education and consulting services to the sports world with the aim of overcoming the complexities of sport in today's society and improving how it is governed and managed.

For more information: www.cies.ch



Foreword

Doctor, is it serious?

The more we know, the more we want to find out. This is the modus operandi of the CIES Football Observatory research team when we tackle our annual Demographic Study of the European football players' labour market. We can say with confidence that our thirst for knowledge is shared by many actors in professional football. We hope that this latest edition will whet your appetite to find out more about the dynamics at work in the 31 championships studied. New analyses specifically elaborated for this edition will help you to compare the state of football between different countries.

Generally speaking, the Study shows that professional European football is still confronted with processes that do not necessarily augur well for its future. The cloud of economic uncertainty that hangs over sporting logics is flagrant in many clubs and countries. In general, the number of transfers carried out by teams during the current season is at an all-time high. A trend that is difficult to understand given the actual climate with its numerous financial difficulties.

The increasing speculation surrounding players' transfers is also visible through the progressive drop in the number of club-trained players, which has attained its lowest level since 2009. Conversely, the percentage of expatriate players has risen for the second consecutive year. Here too, the figure has never been so high. More and more teams are integrated into international networks driven by the desire to increase the market value of players by transferring them whenever a lucrative opportunity presents itself.

Our Study shows that a thorough rethink is necessary to introduce adequate regulatory mechanisms to protect players in particular, and football more generally, against the increasingly speculative nature of the transfer market. Our analyses allow us to identify not only the situations most at risk, but also the more worthy realities from which we can draw inspiration.

Enjoy your read!

Raffaele Poli, head of CIES Football Observatory

Sample and glossary

The data presented in this report were carefully gathered and analysed by the CIES Football Observatory academic team. They concern players present on October 1st in first team squads of clubs in 31 top division leagues of UEFA member associations. To be included in the sample, a footballer has to have played in championship matches during the season in question or he must have played in adult leagues during each of the two preceding ones. Matches in B-teams for unplayed A-team squad members are not considered. All first team goalkeepers are taken into account up to a number of three, even though they may not have yet played in adult leagues. Above three, goalkeepers are included only if they fulfil this latter condition.

For the purpose of the analysis, leagues surveyed were divided into five continental areas (see map on the next page). Championships were also split according to sporting level. Three categories were determined by taking into account the CIES Football Observatory European league ranking. This is based on results achieved in European club competitions by league representatives.

The following indicators are analysed:

- **Squad size:**

number of players corresponding to the above mentioned criteria (first team squad members)

- **Age:**

age of squad members on October 1st of a given year

- **Age of recruitment:**

age at which squad members were recruited by their employer club. Not including players signed from youth academies

- **Height:**

height of squad members in centimetres

- **New signings:**

squad members with previous experience in adult leagues recruited between January 1st and October 1st of a given year

- **Academy players:**

squad members who started their career in adult leagues between January 1st and October 1st of a given year

- **Stay:**

number of seasons of players as first team squad members in their employer club

- **Club-trained players:**

players among squad members who played for at least three seasons between the ages of 15 and 21 for their employer club

- **Active internationals:**

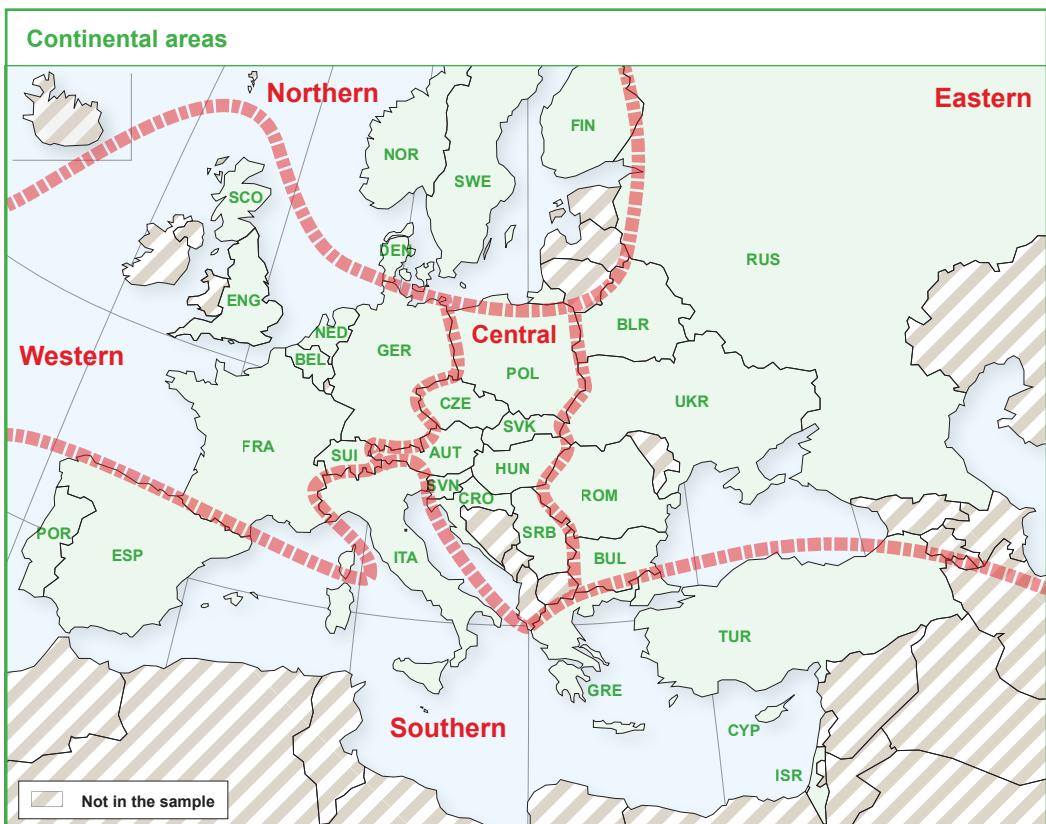
players among squad members who played for a national A-team between January 1st and October 1st of a given year

- **Expatriates:**

players among squad members who began playing in a different national association from that of their employer club and who went abroad for football-related reasons

- **Loans:**

squad members under contract with their employer club on a temporary basis



League category

Level 1

- England
- Spain
- Germany
- Italy
- France

Level 2

- Portugal
- The Netherlands
- Ukraine
- Russia
- Belgium
- Greece
- Denmark
- Turkey
- Austria
- Switzerland
- Romania

Level 3

- Cyprus
- Czech Republic
- Israel
- Sweden
- Poland
- Norway
- Croatia
- Belarus
- Serbia
- Slovakia
- Bulgaria
- Hungary
- Scotland
- Finland
- Slovenia

Highlights

Record low for club-trained players

The Study shows that the percentage of expatriate players reached a new record high this season: 36.8%. The proportion of footballers who have already experienced international migration during their career was also never as high as for current season: 49.3%. These findings confirm the growing internationalisation of football players' labour market.

While Brazil remains the most represented foreign origin, their number decreased by 67 since 2009: from 538 to 471. France is the second nation with the highest number of expatriates in top division European leagues: from 247 to 306 (+59) during the same period. The biggest increase since 2009 was observed for Spain: from 57 to 178 (+121).

The increase in international mobility goes hand in hand with the decrease in the percentage of club-trained players. Despite the regulations introduced in many countries and at UEFA club competition level, the relative presence of footballers playing for the club where they were trained reached a new record low: 21.2%.

A new record was also registered with regard to the number of new signings. On average, 41.3% of top division teams in Europe are made up of players recruited from January 2013 onwards (10.2 signings per club). Transfer activity is particularly high in Southern and Eastern Europe: on average 12.1 new signings per team in both areas. This figure is almost twice as high as in Northern Europe (6.8).

At league level, Italy and England top the table for the largest squads (26.8 players per club on average). Italian Serie A also gathers the most seasoned footballers (27.3 years) and the least percentage of club-trained players (8.4%). The tallest league is German Bundesliga (183.8cm), while the shortest is Spanish Liga (180.1cm).

The highest percentage of players with national A-team caps in 2013 was recorded in England (44.3%). The English Premier League also has the second highest percentage of expatriate footballers (60.4%), just after Cyprus. The latter country also tops the ranking of the highest number of players signed after January 2013 (on average 14.1 per club). This figure was only 5.3 in Sweden.

At club level, the Study reveals that Barcelona has the second shortest squad (177.4cm) among the 472 club surveyed, as well as the most stable one. Players in the Catalan club have been on average for 5.5 years in the first team squad. The average stay is above 5 years in only one other club: Manchester United.

The highest percentage of players having represented national A-teams in 2013 was recorded at Chelsea (80%). The London club outranks Manchester City and Fenerbahçe. Inter Milan has the greatest proportion of expatriate footballers (89%), ahead of Porto. Crystal Palace has the largest squad among teams surveyed (34 players).

Finally, our analysis confirms the excellent work undertaken by Ajax in the area of youth training. The Dutch side tops the table of clubs having trained the most players under contract with top division teams in Europe. With 69 representatives, Ajax outranks Partizan Belgrade, Barcelona, Hajduk Split and Sporting Lisbon.

The last section of the Study presents the most employed U21 players for each league analysed. This allows us to identify some of the most promising footballers throughout Europe.

CLUB-TRAINED PLAYERS

Szombathelyi Haladás (Hungary) is the European top division team composed of the highest percentage of players trained in the club (85.7%). Club-trained footballers represent more than three-quarters of squad members in two other teams: Hearts of Midlothian and Osijek.

At big-5 league level, only four clubs out of 98 are made up of a majority of club-trained players: Barcelona, Athletic Bilbao, Real Sociedad and Lyon.

Highest % of club-trained players*

Top 10, by level

Level 1

1. Barcelona (ESP)	64.0%
2. Athletic Bilbao (ESP)	60.9%
3. Real Sociedad (ESP)	57.7%
4. Lyon (FRA)	53.8%
5. Montpellier (FRA)	48.0%
6. Sochaux (FRA)	42.3%
7. Rennes (FRA)	40.0%
8. Celta Vigo (ESP)	38.5%
9. Freiburg (GER)	34.6%
10. Arsenal (ENG)	32.3%

Level 2

1. Midtjylland (DEN)	53.6%
2. AaB (DEN)	52.4%
3. Feyenoord (NED)	52.0%
4. Ergotelis (GRE)	48.0%
5. Admira Wacker (AUT)	46.2%
6. Ajax (NED)	46.2%
7. Esbjerg (DEN)	45.5%
8. Karpaty (UKR)	44.4%
9. Young Boys (SUI)	44.0%
10. Sturm Graz (AUT)	41.7%

Level 3

1. Szombathelyi Haladás (HUN)	85.7%
2. Heart of Midlothian (SCO)	80.0%
3. Osijek (CRO)	77.4%
4. Trenčín (SVK)	68.2%
5. MTK (HUN)	65.2%
6. Brommapojkarna (SWE)	62.5%
7. FK Rad (SRB)	60.0%
8. Ružomberok (SVK)	59.1%
9. Sigma Olomouc (CZE)	57.1%
10. JJK (FIN)	54.2%

Club record, by league

Level 1

ESP	Barcelona	64.0%
FRA	Lyon	53.8%
GER	Freiburg	34.6%
ENG	Arsenal	32.3%
ITA	Atalanta	28.6%

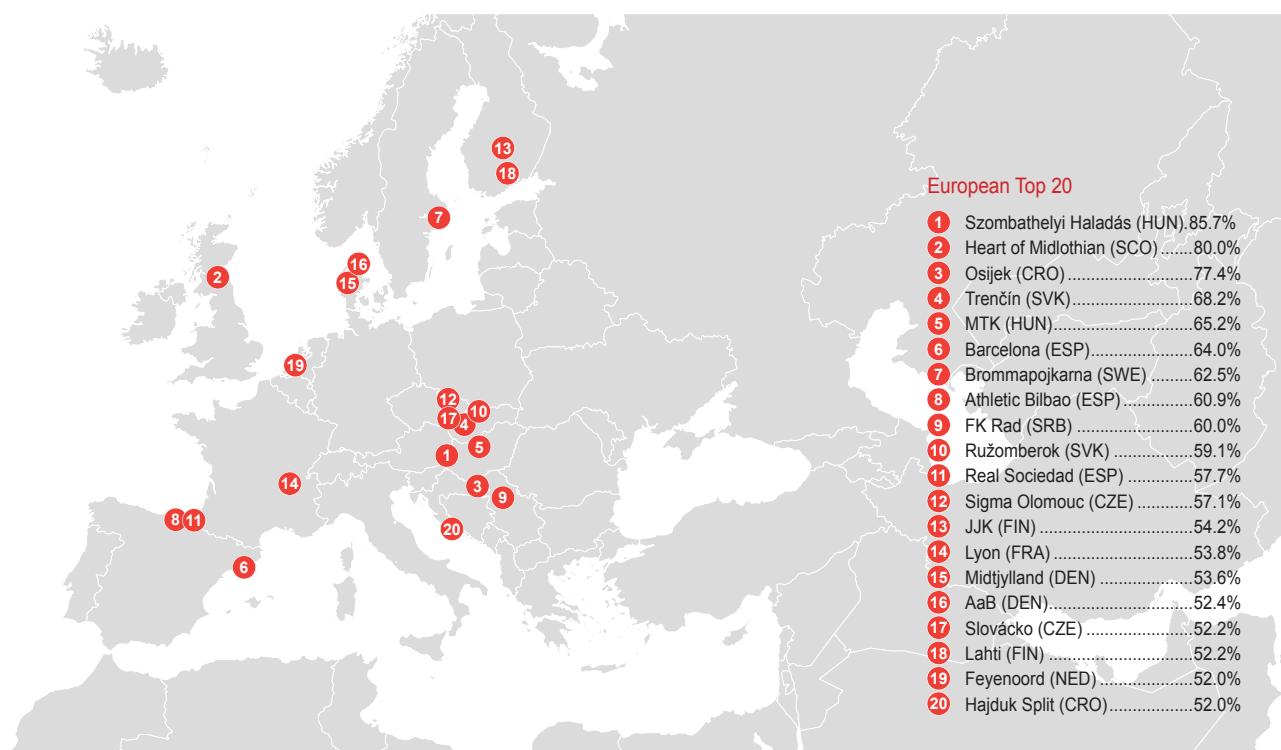
Level 2

DEN	Midtjylland	53.6%
NED	Feyenoord	52.0%
GRE	Ergotelis	48.0%
AUT	Admira Wacker	46.2%
UKR	Karpaty	44.4%
SUI	Young Boys	44.0%
BEL	Cercle Brugge	38.1%
ROM	Ceahlăul	37.5%
POR	Sporting CP	33.3%
TUR	Gençlerbirliği	25.9%
RUS	CSKA Moskva	22.7%

Level 3

HUN	Szombathelyi Haladás	85.7%
SCO	Heart of Midlothian	80.0%
CRO	Osijek	77.4%
SVK	Trenčín	68.2%
SWE	Brommapojkarna	62.5%
SRB	FK Rad	60.0%
CZE	Sigma Olomouc	57.1%
FIN	JJK	54.2%
ISR	Beitar Jerusalem	50.0%
BUL	Litex	45.8%
SVN	Triglav	44.8%
BLR	Dnepr Mogilev	44.0%
POL	Wista Kraków	43.5%
CYP	Enosis	41.7%
NOR	Odds BK	36.4%

* Footballers who played for at least three seasons between the ages of 15 and 21 for their employer club



TRAINING CLUBS

As last season, Ajax is the most prolific training club in Europe. The Dutch side has trained 69 players under contract with top division teams. While 12 footballers still play for Ajax, 57 are employed by other teams.

The second most prolific training club is Partizan Belgrade, followed by Barcelona. The latter club tops the big-5 league table, followed by another very competitive Spanish team: Real Madrid. Many other top flight teams are in the top positions of the ranking.

Number of players trained in top division leagues*

Top 10, by level

Level 1

1. Barcelona (ESP)	61 (16)
2. Real Madrid (ESP)	46 (7)
3. Arsenal (ENG)	36 (10)
. Bayern München (GER)	36 (7)
. Lyon (FRA)	36 (14)
6. Rennes (FRA)	35 (10)
7. PSG (FRA)	33 (3)
8. Valencia (ESP)	30 (5)
9. Manchester United (ENG)	29 (9)
. Sochaux (FRA)	29 (11)

Level 2

1. Ajax (NED)	69 (12)
2. Sporting CP (POR)	52 (8)
3. Feyenoord (NED)	44 (13)
. Dynamo Kyiv (UKR)	44 (5)
5. Shakhtar Donetsk (UKR)	43 (4)
6. Porto (POR)	37 (1)
7. Twente (NED)	34 (6)
8. Heerenveen (NED)	32 (6)
. Benfica (POR)	32 (2)
10. PSV (NED)	31 (7)

Level 3

1. Partizan (SRB)	66 (7)
2. Hajduk Split (CRO)	52 (13)
3. Crvena Zvezda (SRB)	50 (5)
4. Sparta Praha (CZE)	46 (6)
5. Dinamo Zagreb (CRO)	45 (7)
6. MTK (HUN)	43 (15)
7. Dinamo Minsk (BLR)	41 (8)
. Osijek (CRO)	41 (24)
9. Slavia Praha (CZE)	39 (11)
10. Levski Sofia (BUL)	37 (4)

Club record, by league

Level 1

ESP	Barcelona	61 (16)
FRA	Lyon	36 (14)
ENG	Arsenal	36 (10)
GER	Bayern München	36 (7)
ITA	Internazionale	25 (1)

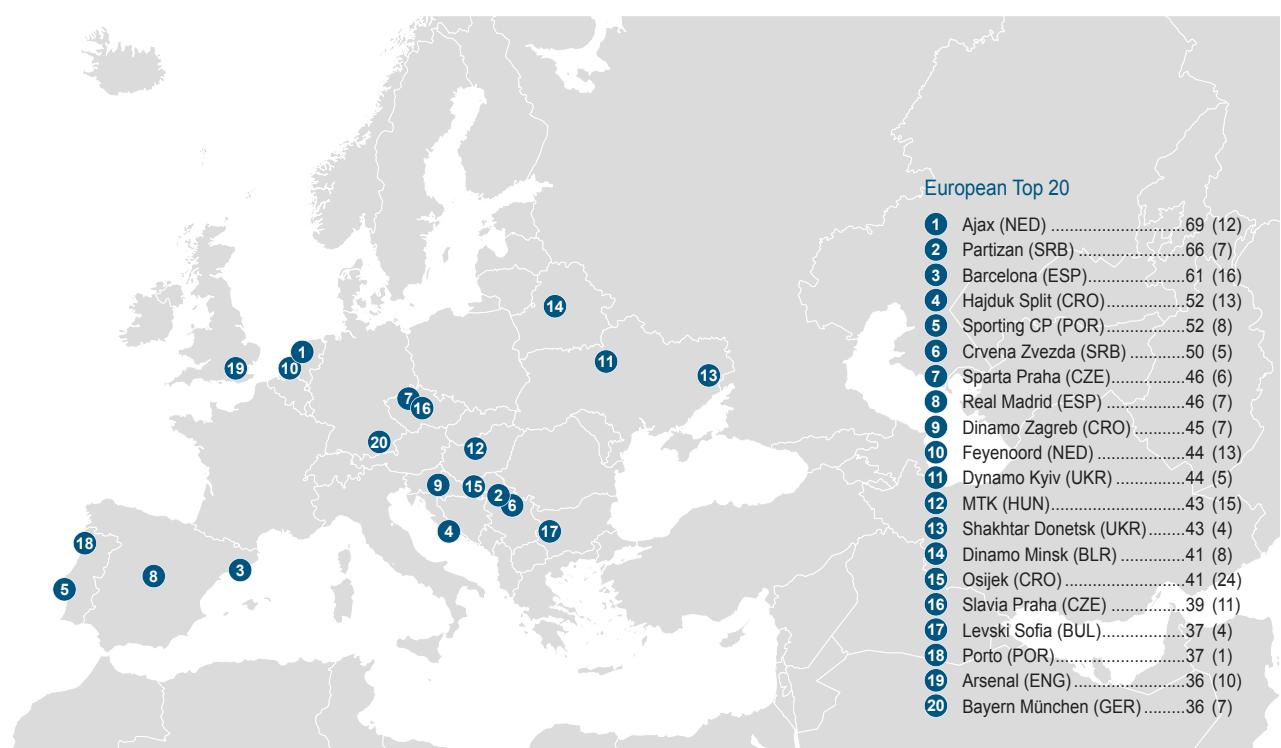
Level 2

NED	Ajax	69 (12)
POR	Sporting CP	52 (8)
UKR	Dynamo Kyiv	44 (5)
BEL	Standard	29 (6)
RUS	Spartak Moskva	29 (6)
DEN	Brøndby	27 (10)
GRE	Panathinaikos	26 (10)
SUI	Zürich	26 (10)
AUT	Rapid Wien	26 (9)
TUR	Beşiktaş	19 (2)
ROM	Dinamo Bucureşti	17 (3)

Level 3

SRB	Partizan	66 (7)
CRO	Hajduk Split	52 (13)
CZE	Sparta Praha	46 (6)
HUN	MTK	43 (15)
BLR	Dinamo Minsk	41 (8)
BUL	Levski Sofia	37 (4)
SVK	Nitra	32 (15)
FIN	HJK	32 (8)
ISR	Maccabi Tel Aviv	30 (10)
SWE	Malmö FF	26 (14)
POL	Wisła Kraków	24 (10)
SVN	Gorica	24 (10)
SCO	Celtic	22 (5)
NOR	Rosenborg	16 (5)
CYP	Apollon Limassol	16 (4)

* (): players who are still in the club



CLUB-TRAINED

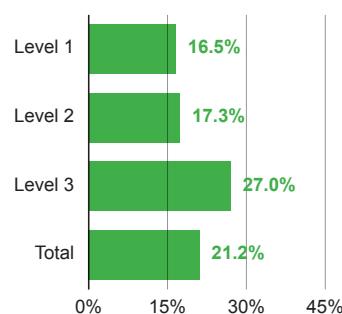
The percentage of club-trained players has decreased for the fourth consecutive season, reaching a new record low (21.2%). This proportion is much greater in the least competitive leagues (27.0%) than in the most competitive ones (16.5%).

The biggest decrease since 2009 was recorded in Eastern Europe (from 23.0% to 16.6%, -6.4%). The only continental area where the relative presence of players trained in the club has increased is Northern Europe (from 30.5% to 32.5%, +2.0%).

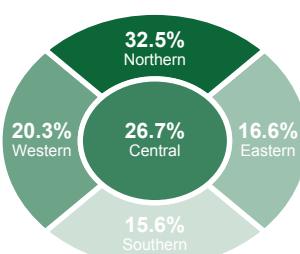
At league level, Sweden out-ranked Slovakia in the table of the leagues with the highest percentage of club-trained players (38.9%). Sweden is also the country where the percentage of club-trained footballers increased the most since 2009 (+8.1%).

% of club-trained players (2013)

By league level



By continental area



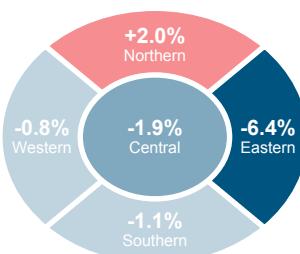
Trend since 2009

2009	2010	2011	2012	2013
23.1%	22.9%	22.2%	21.6%	21.2%

Highest increases

1. Sweden	+8.1%
2. Scotland	+5.7%
3. Austria	+5.4%
4. Switzerland	+4.8%
5. Czech Republic	+4.7%

Trend, by continental area



Highest decreases

1. Slovenia	-14.8%
2. Romania	-7.0%
3. Israel	-6.8%
4. Bulgaria	-6.5%
5. Ukraine	-6.3%

% of club-trained players, by league (2013)

