



EUROPEAN FOOTBALL BENCHMARK | GERMANY



Bundesliga 2018: clubs, sponsors, fans

Statista European Football Benchmark – Report

August 2018

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

Terry Pratchett

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INTRODUCTION & METHODOLOGY



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

Introduction & methodology – introduction

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 Spain¹ – awareness, image, fan-profiles
- Sponsors: All main kit sponsors – awareness, image, sponsor-club fit
- Fans: Media usage, apps & social media, attitudes, spending behavior, stadium visits
- DIY-Analyses: Statistics, tables and do-it-yourself analysis tool

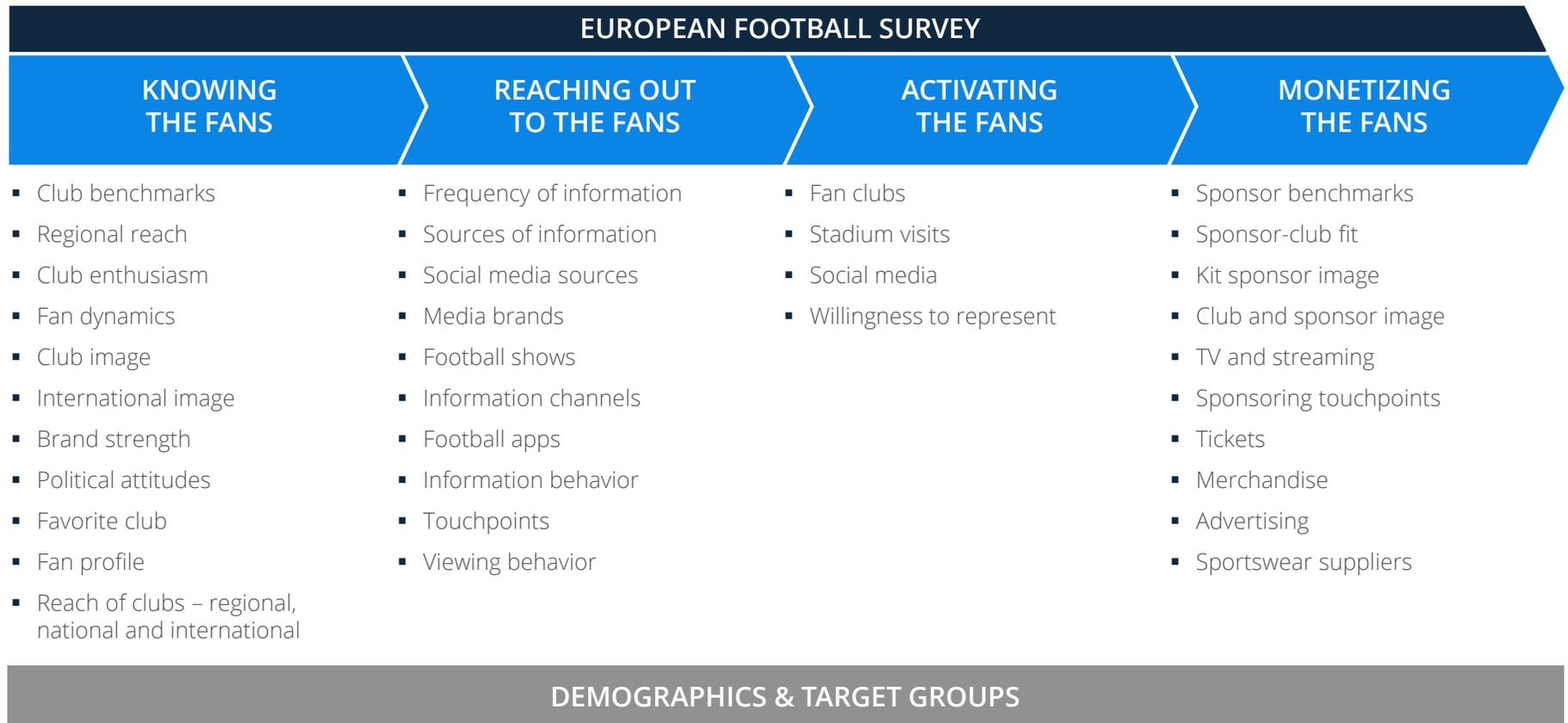
[Browse the European Football Benchmark online](#)



- ✓ **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 leagues²**
- ✓ **400 sponsors, media and sports clothing brands included**
- ✓ **Designed to help clubs, sponsors, marketers, planners and product managers to understand fan behavior and attitudes**

Developing a fan in four steps

Introduction & methodology – survey content



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

La Liga (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 Sevilla
-  Real Madrid
-  Real Sociedad San Sebastian
-  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

¹: Including the promoted and relegated teams of 2018

Note: At launch, data on the Premier League (England) and the Bundesliga (Germany) are available. Data on the first divisions in France, Italy and Spain will be released soon.

While big clubs can build on a strong national fan base, smaller clubs mobilize their regions

Introduction & methodology – key insights Germany (1/2)

The 36 million fans of Bundesliga clubs in Germany spend a yearly average of €398 each on football

Of the 69 million adults in Germany, 45 million are interested in football, 36 million are a fan of at least one Bundesliga club and 15 million are hardcore fans¹. Fans of Bundesliga clubs spend on average €398 each per year, while hardcore fans³ spend 87% more: €746. Most of the money (around 40%) is spent on tickets, followed by pay-TV and fee-based streaming.

Attention and affection are the foundation of any fan base – FCB and BVB are leaders in both rankings

Bayern München is the Bundesliga club which the highest percentage of people is interested in – it is also the favorite club for the biggest share of fans and the most hated club at the same time. Borussia Dortmund – second favorite – are far less hated.

Clubs like Werder Bremen and RB Leipzig successfully connect to their fans with different philosophies

Werder Bremen and RB Leipzig communicate highly different but distinct images and their fans and supporters appreciate this. Both clubs prove that strategic branding and filling a distinct image with life can unlock yet-untapped fan potential.

FC Bayern München and Borussia Dortmund have the strongest club brands

Unlike a distinct image, sheer brand strength is strongly connected to the attention a club gets and to its success on the pitch. FC Bayern and Borussia Dortmund lead in all brand strength dimensions.

Online is the best medium to reach younger fans – TV caters to the information needs of older fans

Fans younger than 30 years inform themselves about football online rather than on TV. In the older age groups of 50+, TV clearly wins over online as an information channel.

Apps provide a huge potential to clubs

TV stations and shows are still the most frequently used information channel overall, but apps are gaining ground. Football club apps are the most widely used type of apps, which makes them a perfect way for clubs to reach out to their own fans who search for information.

Women act as social media multipliers

Female fans are far more active on social media than their male counterparts. This applies to almost every activity that can be done on social media. Clubs that want to leverage social media should have a content strategy that does not neglect female fans.

1: Hardcore fans are fans of at least one club, inform themselves about football several times per week during the season and own fan merchandise. Additionally, they might have a favourite club, watch football several times a week, visit a stadium regularly or be a member of a football fan club.

The secret of a good sponsor-club fit lies in a matching image

Introduction & methodology – key insights Germany (2/2)

Telekom, Volkswagen, Red Bull and Mercedes-Benz-Bank are among the stars of sponsors

6 out of 20 Bundesliga kit sponsors have high awareness levels among fans and are at the same time perceived to fit very well to the club they support. This makes them the stars among sponsors. Schwarzwaldmilch has a lower general awareness among football fans, but it is the German number two when it comes to sponsor-club fit – a real local hero.

Whether sponsor and club are perceived to match, depends – a lot of potential to be used or wasted

There are huge margins in perceived Bundesliga sponsor-club fits. Hoffenheim and SAP are seen as the most fitting duo with 96% of respondents attesting them a good fit. Werder Bremen and Wiesenhof are the least fitting Bundesliga sponsor-club combination in the perception of the supporters.

Clubs with a high sponsor-club fit level generally match their sponsor's image in several terms – SC Freiburg is a good example

Freiburg and their main kit sponsor Schwarzwaldmilch are perceived as well fitting. This is mirrored in the images that fans perceive of the clubs and sponsors. Clubs and sponsors that want to be described as a good fit should focus on matching their image dimensions.

Hardcore fans¹ are willing to pay for TV and streaming while casual fans prefer free TV and radio

Hardcore fans are far more likely to use pay-TV and fee-based streaming services than casual fans, with 50% following football games on pay-TV (such as Sky) and 20% using fee-based streaming services.

Selling tickets is (still) a multi-channel business

The topic of ticketing is interesting due to the diversity of purchase channels: Purchasing tickets for football games via one of the various retail channels is still most common, followed by online purchases at the club or other ticket agencies. The good old ticket office at the stadium and clubs' online ticket shops each cater to about 25% of football ticket buyers.

On average, fans spent €55 on merchandise of their favorite Bundesliga club in the past 12 months

While one third of fans spent no money at all on merchandise of their favorite club in the past 12 months, 10% spent €101 and more. With fans spending an average of €55, fan merchandise is a valuable revenue source for clubs. Additionally, an impressive 68% of kit owners buy or get a new kit of their favorite Bundesliga club every season.

1: Hardcore Fans are fans of at least one club, inform themselves about football several times per week during the season and own fan merchandise. Additionally, they might have a favorite club, watch football several times a week, visit a stadium regularly or be a member of a football fan club.

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

Introduction & methodology – methodology

Methodology

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

- 3,030 German football fans
- 3,168 English football fans

The target population are people with an interest in football, aged 18 years and older. Fieldwork took place in June 2018.

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 by BVM/ADM (Germany) and ESOMAR.

DIY analysis with the Statista Customer Cloud®

Introduction & methodology – Statista Customer Cloud®

Statista online do-it-yourself analysis tool

The customized 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 customized 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

The image displays three overlapping screenshots of the Statista Customer Cloud interface. The top screenshot shows the 'Target groups' configuration window with options for 'Custom target group' (e.g., 'Frequent product buyers') and 'Standard target groups' (e.g., 'Demographic Target Groups'). The middle screenshot shows a cross-table titled 'Purchase of apparel by brand' with columns for 'Gender' (female, male) and rows for brands like adidas, Calvin Klein, Converse, Diesel, H&M, and Lacoste. The bottom screenshot shows a detailed benchmark table for 'Favorite football club' with columns for 'Favorite club', 'Fans', 'Fans / club', 'annual', 'fans / club / fan', and 'club's share / own fanbase each', listing various clubs like Arsenal, Borussia Dortmund, and Bayern Munich.

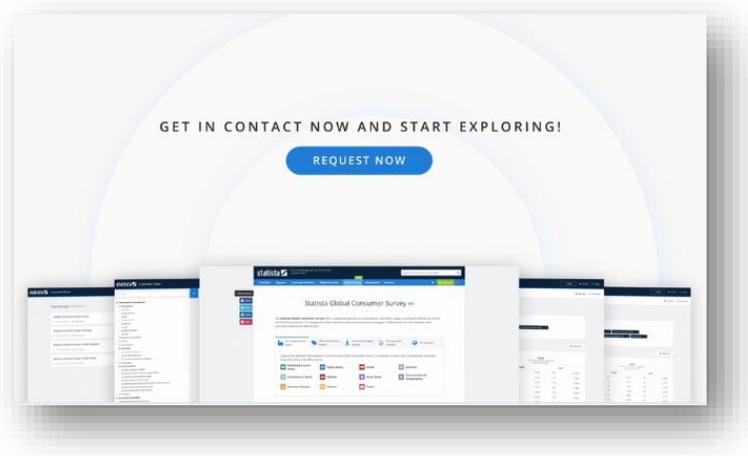
Contact us for access to the European Football Benchmark

Introduction & methodology – 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:



Robin Juhl

Customer Relations Europe

TEL +49 40 28484 10

E-MAIL
kundenservice@statista.com



Lodovica Biagi

Operations Manager UK

TEL +44 203 709 9960

E-MAIL
eu.support@statista.com

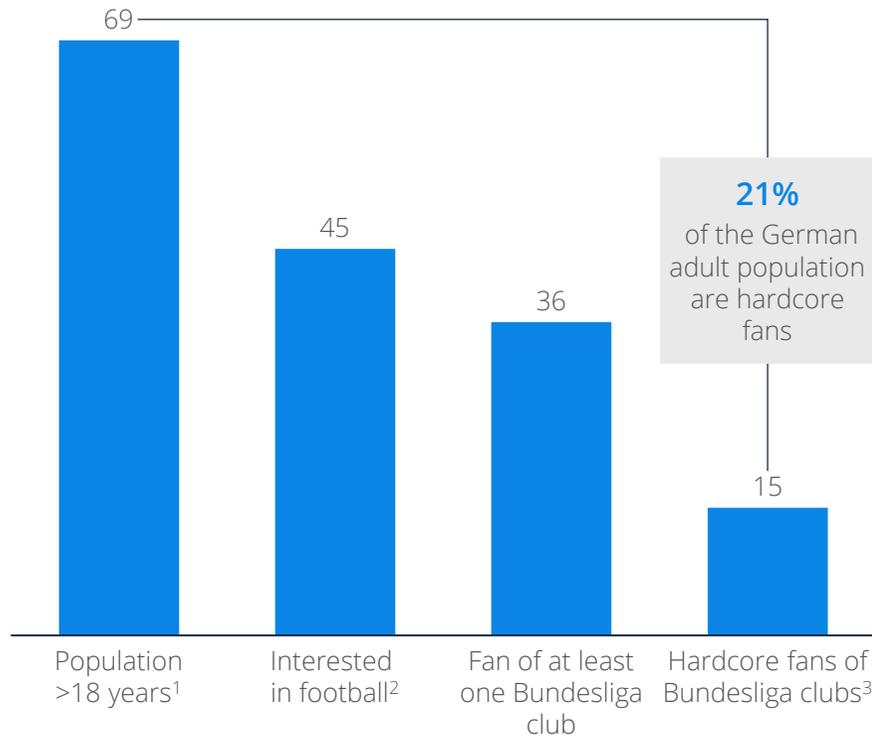
KNOWING THE FANS



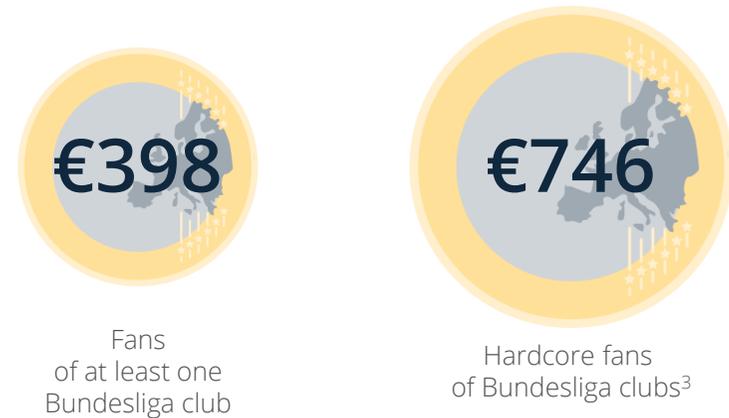
The 36 million fans of Bundesliga clubs in Germany spend a yearly average of €398 each on football

Knowing the fans – overview

Classification of football fans in million



Average spending on football per year



Fans of Bundesliga clubs spend on average €398 each per year, while hardcore fans³ spend 87% more: €746.

Most of the money (around 40%) is spent on tickets, followed by pay-TV and fee-based streaming.

Those numbers also include spendings on merchandise and food and drinks at the stadium.

1: Statistisches Bundesamt, Zensus 2011 2: Allensbacher Markt- und Werbeträgeranalyse AWA 2017 3: Hardcore fans are fans of at least one club who inform themselves about football several times per week during the season and own fan merchandise. Additionally, they might have a favorite club, watch football several times a week, visit a stadium regularly or be a member of a football fan club.

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

Attention and affection are the foundation for any fan base – FCB and BVB are leaders in both rankings

Knowing the fans – club benchmarks

FC Bayern München and **Borussia Dortmund** are the two clubs in the Bundesliga that spark the most interest among fans – being of interest to more than a third of the German fans each.

Regarding the number of fans who consider a club their favorite, only two big clubs set themselves apart noticeably from the bulk: **FC Bayern München** (28%) and **Borussia Dortmund** (20%) have a 4 to 6 times stronger fan base than the clubs in 3rd place, **FC Schalke 04**, **Hamburger SV**, **1. FC Köln** and **RB Leipzig**, who can count 5% of the German football fans as their own.

Interest in Bundesliga clubs (attention)

| # | Interest in club | % |
|----|--------------------------|-----|
| 1 | FC Bayern München | 38% |
| 2 | Borussia Dortmund | 34% |
| 3 | RB Leipzig | 13% |
| 3 | FC Schalke 04 | 13% |
| 5 | Borussia Mönchengladbach | 11% |
| 5 | Hamburger SV | 11% |
| 5 | 1. FC Köln | 11% |
| 8 | Eintracht Frankfurt | 10% |
| 9 | VfB Stuttgart | 9% |
| 9 | SV Werder Bremen | 9% |
| 9 | 1. FC Nürnberg | 9% |
| 12 | SC Freiburg | 8% |
| 13 | Hertha BSC | 7% |
| 13 | Hannover 96 | 7% |
| 15 | TSG 1899 Hoffenheim | 6% |
| 15 | FC Augsburg | 6% |
| 15 | Bayer 04 Leverkusen | 6% |
| 18 | Fortuna Düsseldorf | 5% |
| 18 | VfL Wolfsburg | 5% |
| 18 | 1. FSV Mainz 05 | 5% |

Favorite Bundesliga club (affection)

| # | Favorite club | % |
|----|--------------------------|-----|
| 1 | FC Bayern München | 28% |
| 2 | Borussia Dortmund | 20% |
| 3 | FC Schalke 04 | 5% |
| 3 | Hamburger SV | 5% |
| 3 | 1. FC Köln | 5% |
| 3 | RB Leipzig | 5% |
| 7 | Eintracht Frankfurt | 4% |
| 7 | Borussia Mönchengladbach | 4% |
| 7 | SV Werder Bremen | 4% |
| 7 | VfB Stuttgart | 4% |
| 11 | 1. FC Nürnberg | 3% |
| 12 | Hertha BSC | 2% |
| 12 | Hannover 96 | 2% |
| 12 | SC Freiburg | 2% |
| 15 | Fortuna Düsseldorf | 1% |
| 15 | 1. FSV Mainz 05 | 1% |
| 15 | TSG 1899 Hoffenheim | 1% |
| 15 | FC Augsburg | 1% |
| 15 | Bayer 04 Leverkusen | 1% |
| 15 | VfL Wolfsburg | 1% |

"Which of the following Bundesliga clubs are you interested in (e.g. results, transfers, news)?"; Multi Pick; n=3,030; "And which club is your favorite Bundesliga club?"; n=2,455, respondents who are fan of at least one club
Source: [Statista European Football Benchmark 2018](#)

All clubs have the heart of their fan base at home, but some clubs have a much bigger catchment area

Knowing the fans – regional reach

Regional reach of Hamburger SV



| # | Top 5 states by share of fans | % |
|---|-------------------------------|-----|
| 1 | Schleswig-Holstein | 48% |
| 2 | Hamburg | 45% |
| 3 | Bremen | 19% |
| 4 | Mecklenburg-Vorpommern | 13% |
| 5 | Niedersachsen | 10% |

Regional reach of RB Leipzig



| # | Top 5 states by share of fans | % |
|---|-------------------------------|-----|
| 1 | Sachsen | 48% |
| 2 | Thüringen | 32% |
| 3 | Sachsen-Anhalt | 32% |
| 4 | Brandenburg | 16% |
| 5 | Mecklenburg-Vorpommern | 15% |

Regional reach of Eintracht Frankfurt



| # | Top 5 states by share of fans | % |
|---|-------------------------------|-----|
| 1 | Hessen | 49% |
| 2 | Saarland | 8% |
| 3 | Bremen | 7% |
| 4 | Berlin | 6% |
| 5 | Hamburg | 5% |

Regional reach of FC Bayern München

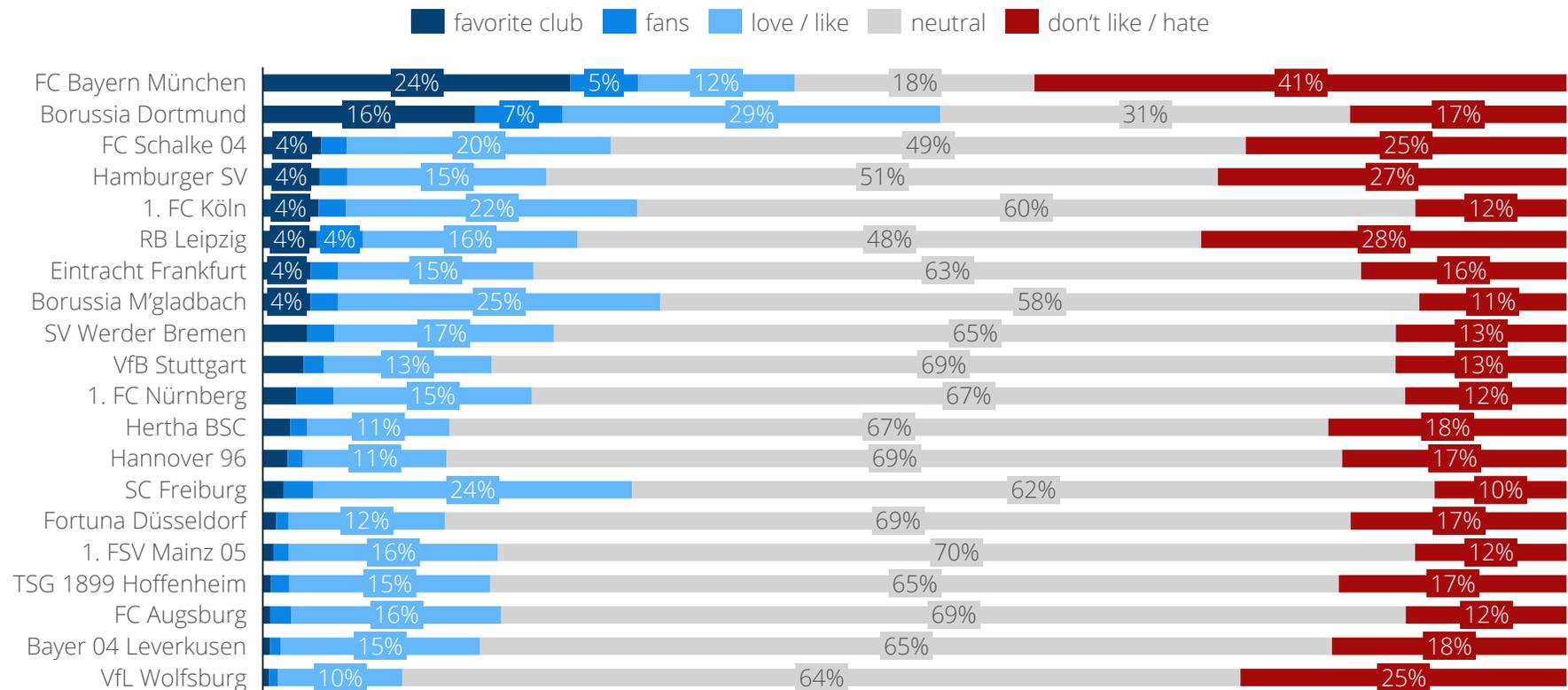


| # | Top 5 states by share of fans | % |
|---|-------------------------------|-----|
| 1 | Bayern | 59% |
| 2 | Baden-Württemberg | 36% |
| 3 | Thüringen | 34% |
| 4 | Sachsen-Anhalt | 33% |
| 5 | Saarland | 32% |

Sometimes big love comes with great hate: Bayern München is both most loved and most hated

Knowing the fans – club enthusiasm

Relationship towards Bundesliga clubs



Note: Values smaller than 4 are not shown to ensure readability

"How is your personal relation to the following football clubs?", respondents who know / are familiar with the club

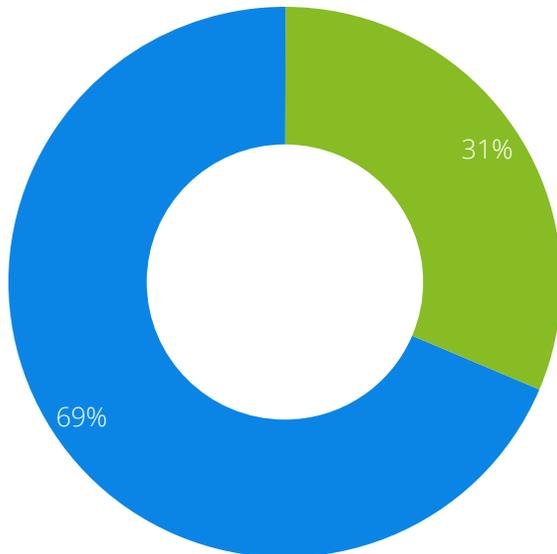
Source: [Statista European Football Benchmark 2018](#)

One third of fans changed their favorite club at some point in their lives, especially fans of younger clubs

Knowing the fans – fan dynamics

Fan loyalty towards favorite club

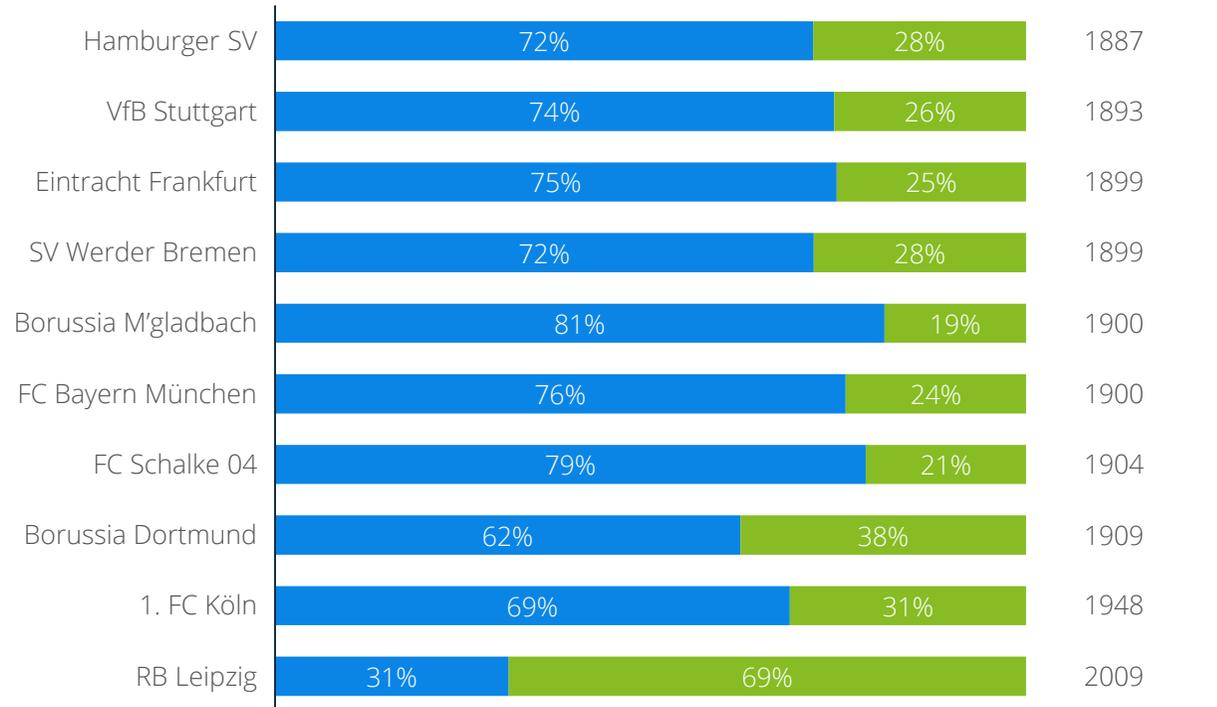
■ stayed with favorite club
■ changed favorite club



Favorite club share & fan loyalty towards top 10 clubs

■ stayed with favorite club
■ changed from another club

Founding year



"Have you ever had a favorite Bundesliga club other than your current favorite club before?"; "And which club is your favorite Bundesliga club?"; n=2,437, respondents who have a favorite Bundesliga club
 Source: [Statista European Football Benchmark 2018](#)

Fans connect to clubs via different image aspects – FC Bayern & SC Freiburg are best-in-class in 4 of them

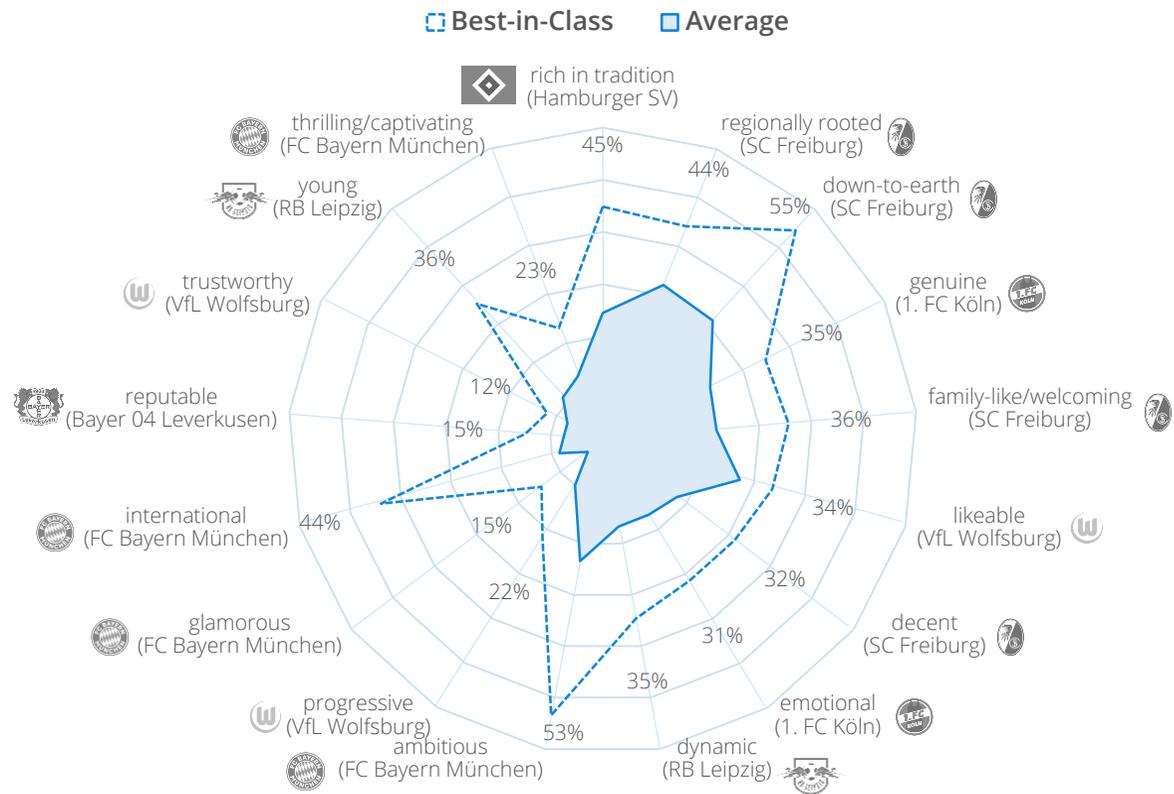
Knowing the fans – club image (1/3)

International flair vs. regional roots – two sides of the Bundesliga

The clubs of the Bundesliga in total reach high average scores in characteristics traditionally associated with the sport such as “regionally rooted” or “down-to-earth”. Especially **Freiburg** – one of the two top scorers - stands out in the evaluation of these classic attributes.

The other top scorer, **Bayern München**, is strong in some dimensions where the average of all clubs is rather low – “glamorous”, “international”, “ambitious”, “thrilling” – and manages to set itself apart from the other clubs by a wide margin.

Top and average image scores among own fans and supporters¹



1: Based on questions about personal relation to clubs (favorite club, fans and "thrills me / love it" or "like it")

"Which of the following are the main characteristics that are typical of ...? Please choose a maximum of 5."; Multi Pick; n=2,861, respondents who are fans or supporters¹ of the club

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

FC Bayern München has the highest number of top spots, but several others score as well

Knowing the fans – club image (2/3)

Top 5 scoring clubs per image attribute among own fans and supporters¹

| # rich in tradition | % |
|---------------------|-----|
| 1 Hamburger SV | 45% |
| 2 FC Schalke 04 | 41% |
| 3 1. FC Köln | 39% |
| 4 Hertha BSC | 35% |
| 5 FC Bayern München | 34% |

| # regionally rooted | % |
|---------------------|-----|
| 1 SC Freiburg | 44% |
| 2 Hannover 96 | 44% |
| 3 VfB Stuttgart | 39% |
| 4 FC Schalke 04 | 38% |
| 5 FC Augsburg | 38% |

| # down-to-earth | % |
|-----------------------|-----|
| 1 SC Freiburg | 55% |
| 2 SV Werder Bremen | 45% |
| 3 Borussia M'gladbach | 39% |
| 4 VfB Stuttgart | 38% |
| 5 FC Augsburg | 38% |

| # genuine | % |
|-----------------------|-----|
| 1 1. FC Köln | 35% |
| 2 FC Schalke 04 | 32% |
| 3 SC Freiburg | 31% |
| 4 Borussia Dortmund | 29% |
| 5 Borussia M'gladbach | 27% |

| # family-like/welcoming | % |
|-------------------------|-----|
| 1 SC Freiburg | 36% |
| 2 SV Werder Bremen | 34% |
| 3 1. FC Köln | 33% |
| 4 1. FSV Mainz 05 | 27% |
| 5 FC Schalke 04 | 26% |

| # likeable | % |
|-----------------------|-----|
| 1 VfL Wolfsburg | 34% |
| 2 SC Freiburg | 33% |
| 3 VfB Stuttgart | 32% |
| 4 Borussia M'gladbach | 32% |
| 5 1. FSV Mainz 05 | 31% |

| # decent | % |
|----------------------------|-----|
| 1 SC Freiburg | 32% |
| 2 1. FSV Mainz 05 | 25% |
| 3 Borussia Mönchengladbach | 24% |
| 4 FC Augsburg | 24% |
| 5 SV Werder Bremen | 23% |

| # emotional | % |
|-----------------------|-----|
| 1 1. FC Köln | 31% |
| 2 FC Schalke 04 | 26% |
| 3 Fortuna Düsseldorf | 25% |
| 4 Eintracht Frankfurt | 23% |
| 5 Borussia Dortmund | 22% |

| # dynamic | % |
|-----------------------|-----|
| 1 RB Leipzig | 35% |
| 2 FC Bayern München | 34% |
| 3 Borussia Dortmund | 29% |
| 4 Bayer 04 Leverkusen | 23% |
| 5 VfL Wolfsburg | 23% |

| # progressive | % |
|-----------------------|-----|
| 1 VfL Wolfsburg | 22% |
| 2 RB Leipzig | 22% |
| 3 FC Bayern München | 21% |
| 4 TSG 1899 Hoffenheim | 18% |
| 5 Bayer 04 Leverkusen | 18% |

| # glamorous | % |
|-----------------------|-----|
| 1 FC Bayern München | 15% |
| 2 Bayer 04 Leverkusen | 5% |
| 3 Hamburger SV | 5% |
| 4 Hertha BSC | 4% |
| 5 TSG 1899 Hoffenheim | 4% |

| # international | % |
|-----------------------|-----|
| 1 FC Bayern München | 44% |
| 2 Borussia Dortmund | 22% |
| 3 Bayer 04 Leverkusen | 15% |
| 4 FC Schalke 04 | 10% |
| 5 VfL Wolfsburg | 9% |

| # trustworthy | % |
|-----------------------|-----|
| 1 VfL Wolfsburg | 12% |
| 2 Borussia M'gladbach | 12% |
| 3 SV Werder Bremen | 11% |
| 4 Hertha BSC | 10% |
| 5 VfB Stuttgart | 10% |

| # young | % |
|-----------------------|-----|
| 1 RB Leipzig | 36% |
| 2 TSG 1899 Hoffenheim | 24% |
| 3 Bayer 04 Leverkusen | 16% |
| 4 Borussia M'gladbach | 15% |
| 5 SC Freiburg | 13% |

| # thrilling/captivating | % |
|-------------------------|-----|
| 1 FC Bayern München | 23% |
| 2 Borussia Dortmund | 21% |
| 3 RB Leipzig | 20% |
| 4 Fortuna Düsseldorf | 17% |
| 5 FC Schalke 04 | 17% |

1: Based on questions about relation to clubs (favorite club, fans and "thrills me / love it" or "like it")

"Which of the following are the main characteristics that are typical of ...? Please choose a maximum of 5.;" Multi Pick; n=2,861, respondents who are fans or supporters¹ of the club

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

Clubs like Werder Bremen and RB Leipzig successfully connect to their fans with different philosophies

Knowing the fans – club image (3/3)

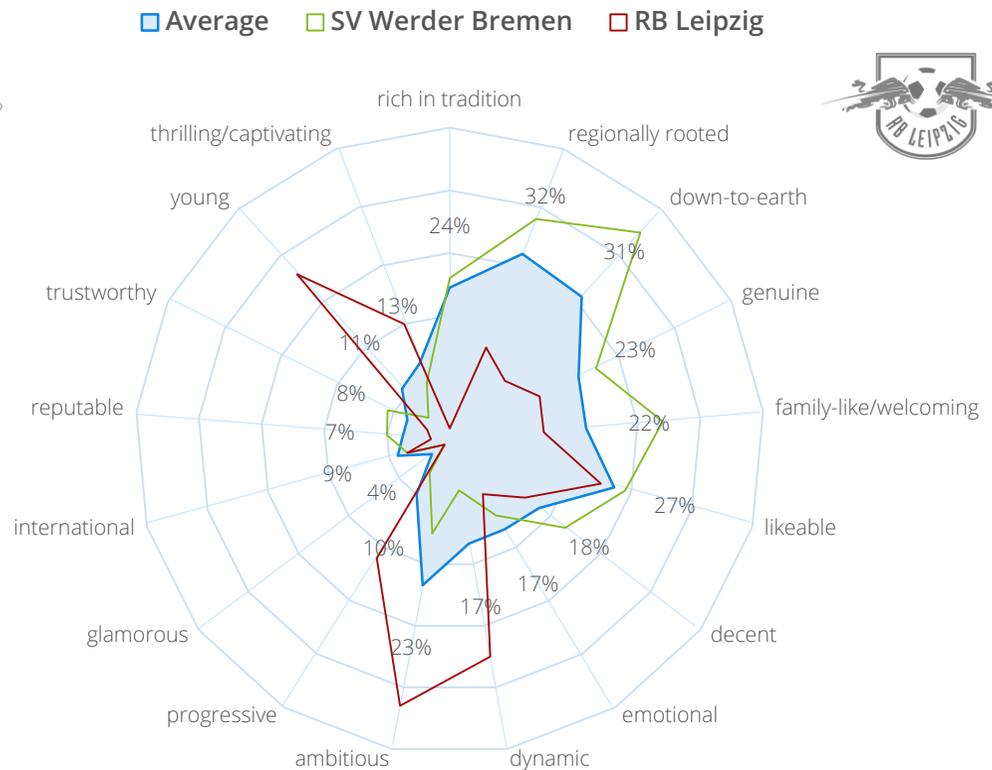
Tradition & heart vs. ambition & brain – two ways into the heart of the fans

Club images reflect club philosophies – and a calculated strategy has the potential to attract new fans.

Founded in 1899, **Werder Bremen** is a "traditional club" and presents itself as socially driven, holding up a code of ethics and being active in their community. While they used to be successful on the field 10 years ago, fans and supporters nowadays value that the club is down to earth, regionally rooted and family-like.

Founded in 2009, **RB Leipzig** is a "project" of Red Bull. The general public sees the club as extremely self-confident, with very ambitious executives who focus more on planning, measurements and methods than on just emotion and tradition. The calculated strategy results in success on the field and an interesting image among fans and supporters: The club is perceived as ambitious, young and dynamic.

Image scores among own fans and supporters¹



¹: Based on questions about personal relation to clubs (favorite club, fans and "thrills me / love it" or "like it") "Which of the following are the main characteristics that are typical of ...? Please choose a maximum of 5."; Multi Pick; average n=2,861, respondents who are fans or supporters¹ of the club; n=277, respondents who are fans or supporters¹ of Werder Bremen; n=402, respondents who are fans or supporters¹ of RB Leipzig

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

Successful clubs are perceived as more international, which reflects their role in UEFA tournaments

Knowing the fans – international image

Clubs perceived as international



Bundesliga 5-year table (top 5)

| # | club | Pts. |
|---|---|------|
| 1 | FC Bayern München  | 423 |
| 2 | Borussia Dortmund  | 314 |
| 3 | Bayer 04 Leverkusen  | 278 |
| 4 | FC Schalke 04  | 270 |
| 5 | Borussia M'gladbach  | 268 |

Background: the top 5 of the Bundesliga qualify for UEFA club-tournaments on a regular basis

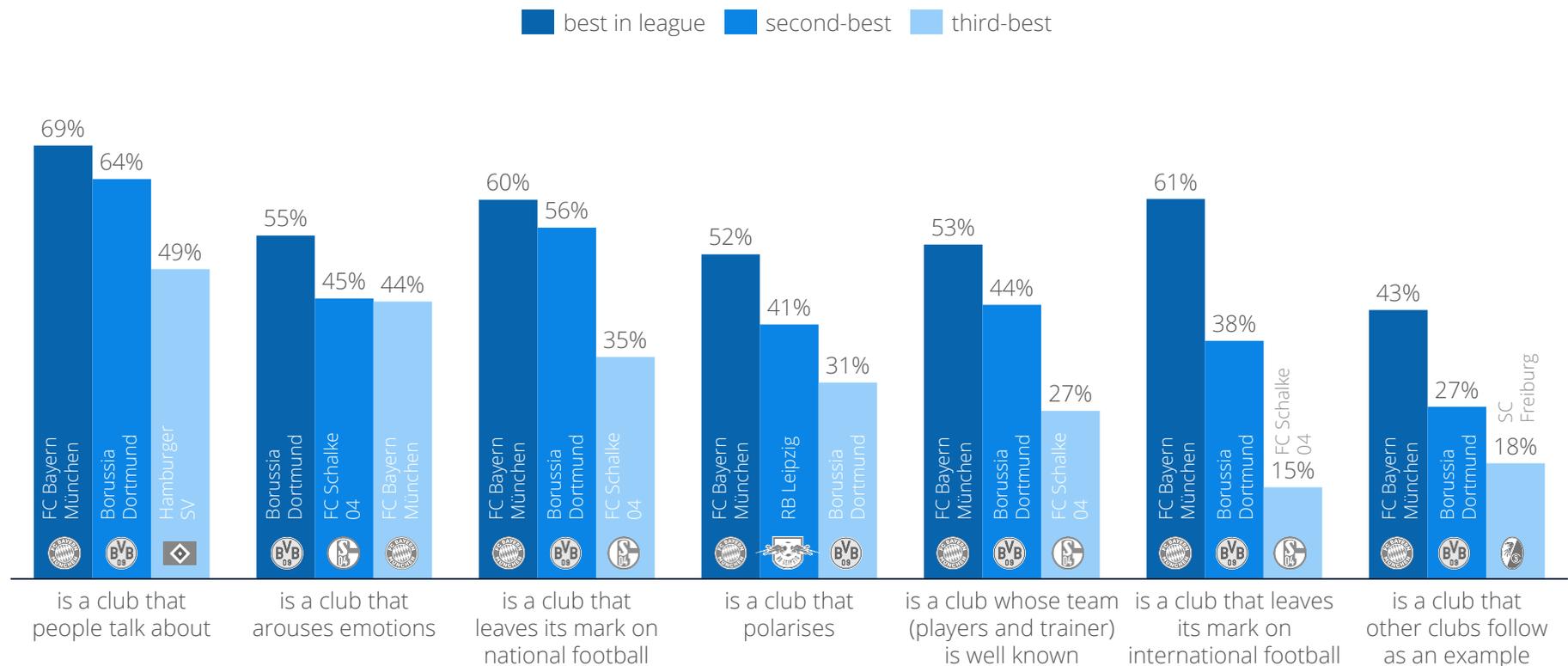
"Which of the following statements are true for the club?"; n>=649; partly randomized sample based on interest and relation to club (see methodology)

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

Attention and success leave a mark – FC Bayern and Borussia Dortmund have the strongest brand profiles

Knowing the fans – brand strength

Brand strength



Most fans count themselves to the political center, with right-wing fans being the smallest fraction

Knowing the fans – political attitudes

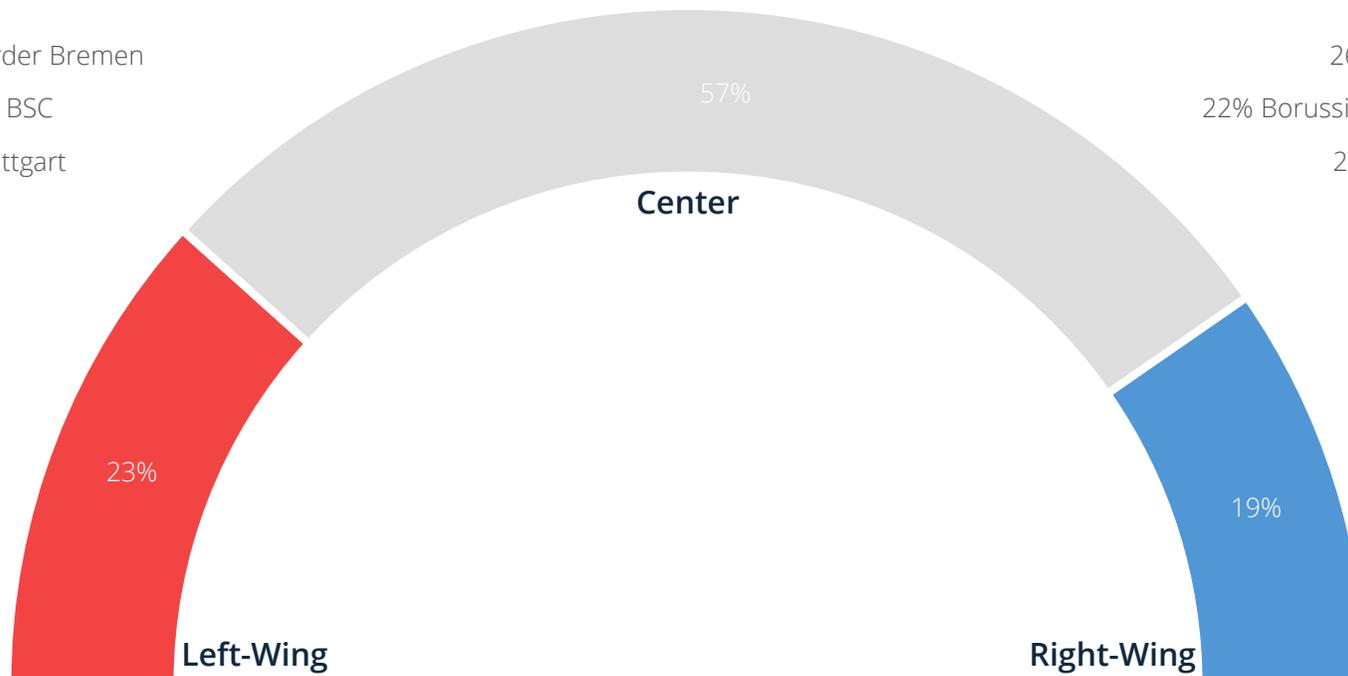
Political attitude of football fans

Top 3 clubs by share of left-wing fans

-  36% SV Werder Bremen
-  33% Hertha BSC
-  29% VfB Stuttgart

Top 3 clubs by share of right-wing fans

-  26% RB Leipzig
-  22% Borussia M'Gladbach
-  21% 1. FC Köln



"Politics are sometimes associated with 'the left' and 'the right' Where would you see yourself on a scale from 0 to 10 if 0 were 'left' and 10 were 'right?'; n=2,711, respondents who did not respond with "prefer not to say"

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

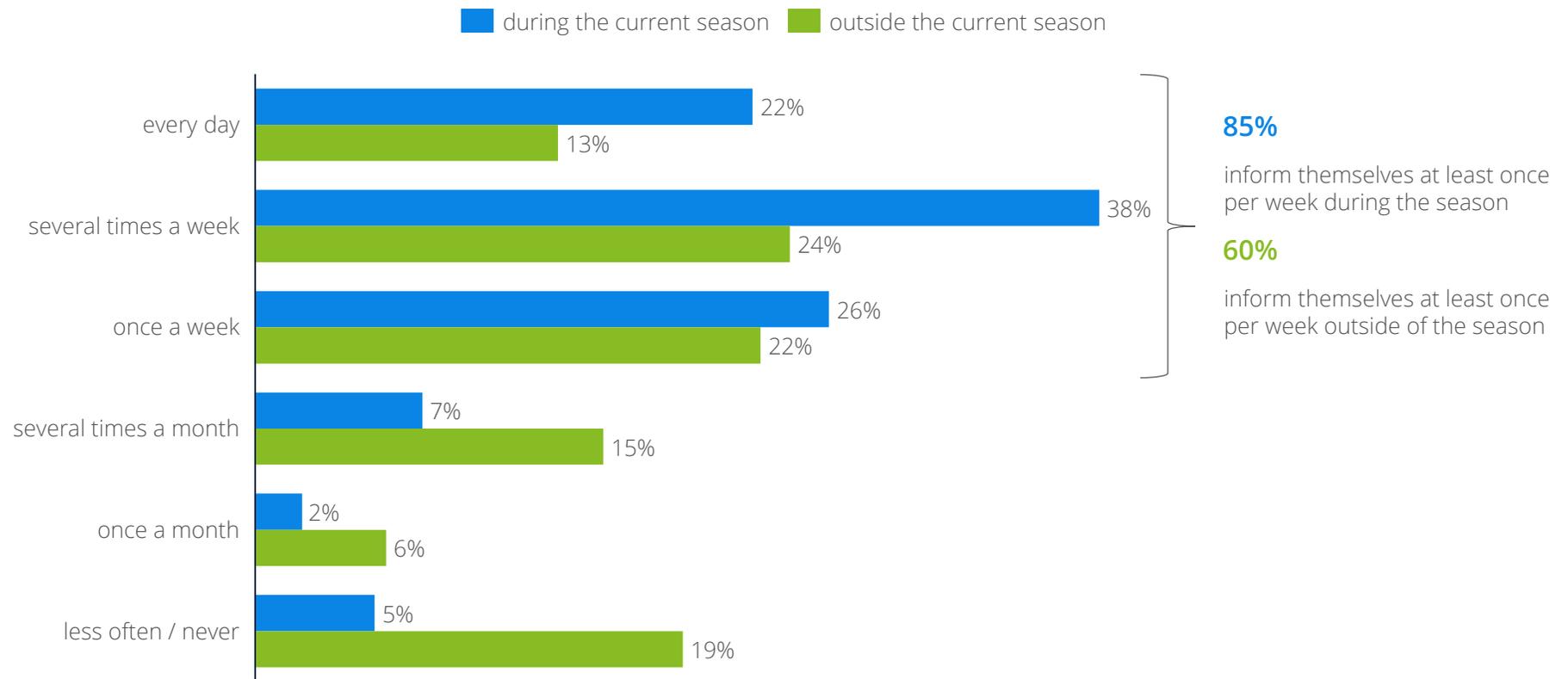
REACHING OUT TO THE FANS



Fans inform themselves frequently about football: a good opportunity to reach out to them

Reaching out to the fans – frequency of information

Frequency of information about football during the season

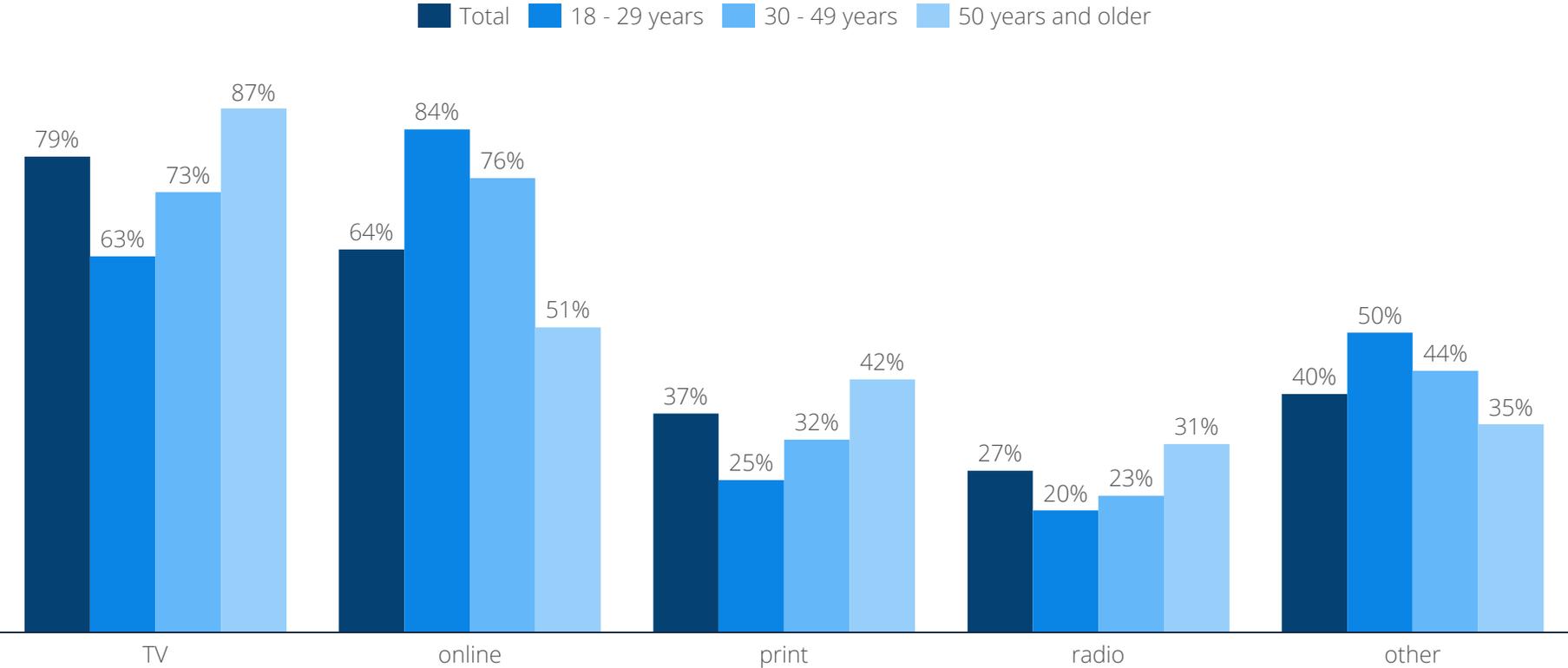


"How often do you inform yourself about football during/outside the current Bundesliga season (e.g. about results, transfers, news)?"; n=2,920, respondents who inform themselves about football
Source: [Statista European Football Benchmark 2018](#)

Online is the best medium to reach younger fans – TV caters to the information needs of older fans

Reaching out to the fans – sources of information

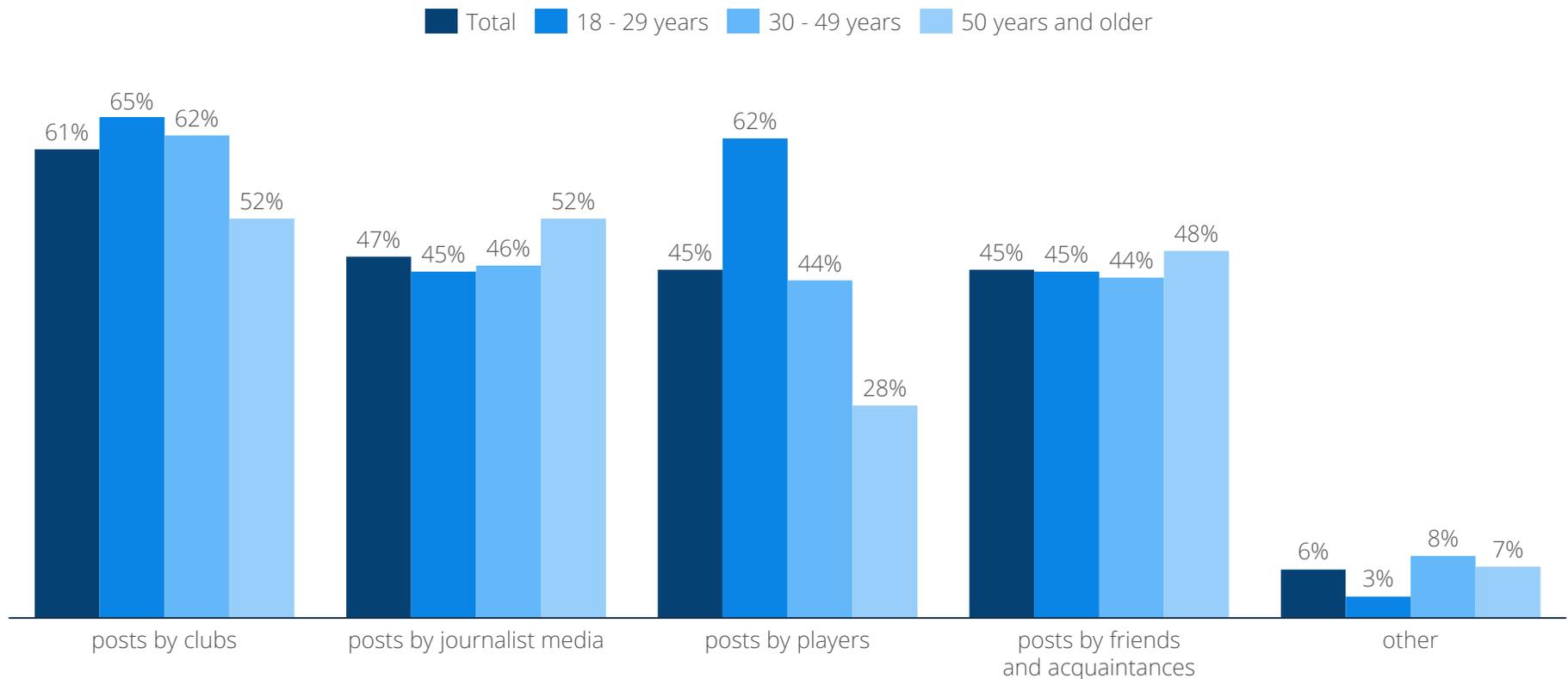
Sources of information about football



On social media, clubs and players excite younger fans, while older fans focus more on journalistic posts

Reaching out to the fans – social media sources

Social media sources of information about football



"And how do you get information about football via social media?"; Multi Pick; n=526, respondents who get information about football via social media

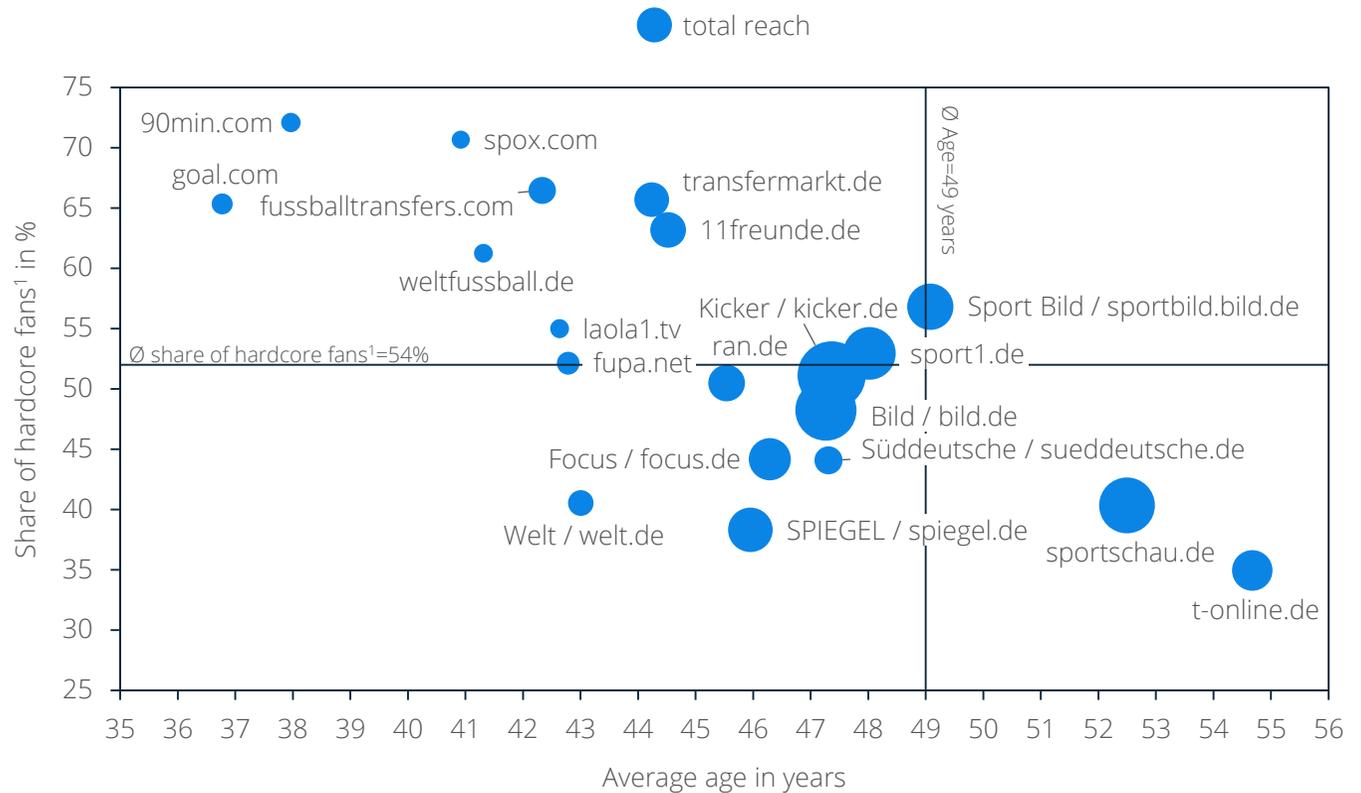
Source: [Statista European Football Benchmark 2018](#)

Older and more moderate fan groups rely on different media than younger hardcore fans

Reaching out to the fans – media brands

Analysis of the top 20 media brands

| # | Total Reach | % |
|----|--------------------------------|-----|
| 1 | Kicker / kicker.de | 35% |
| 2 | Bild / bild.de | 28% |
| 3 | sportschau.de | 23% |
| 4 | sport1.de | 21% |
| 5 | Sport Bild / sportbild.bild.de | 16% |
| 6 | SPIEGEL / spiegel.de | 15% |
| 7 | Focus / focus.de | 13% |
| 8 | t-online.de | 12% |
| 9 | ran.de | 10% |
| 10 | 11freunde.de | 10% |
| 11 | transfermarkt.de | 9% |
| 12 | Süddeutsche / sueddeutsche.de | 6% |
| 13 | fussballtransfers.com | 6% |
| 14 | Welt / welt.de | 5% |
| 15 | fupa.net | 4% |
| 16 | goal.com | 3% |
| 17 | 90min.com | 3% |
| 18 | laola1.tv | 3% |
| 19 | weltfussball.de | 3% |
| 20 | spox.com | 2% |



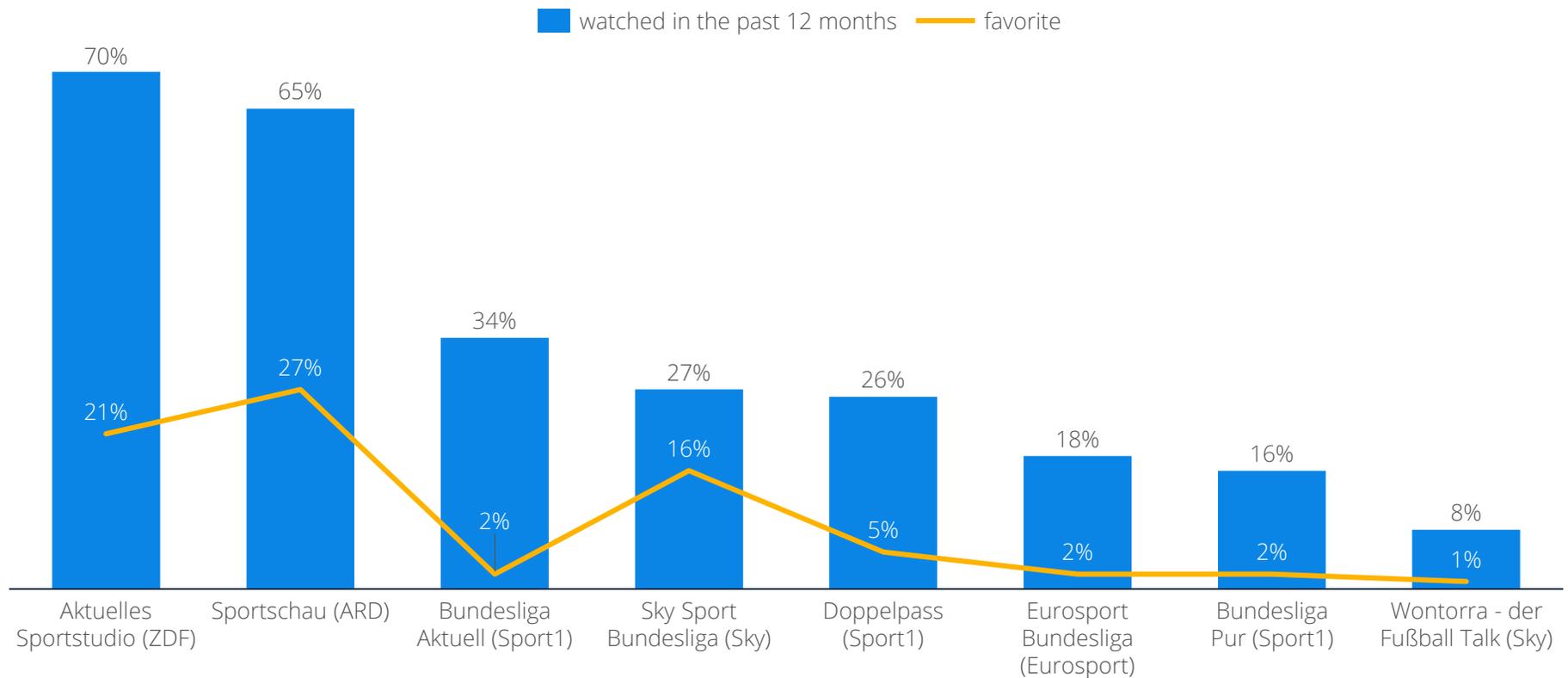
1: Hardcore fans are fans of at least one club, inform themselves about football several times per week during the season and own fan merchandise. Additionally, they might have a favorite club, watch football several times a week, visit a stadium regularly or be a member of a football fan club.

"Which of the following providers do you use at least occasionally to get information about football (web and print offerings)?"; Multi Pick; n=3,030
Source: [Statista European Football Benchmark 2018](#)

Aktuelles Sportstudio and Sportschau on public television are the most popular football TV shows

Reaching out to the fans – football shows

Viewing habits and preference for football shows



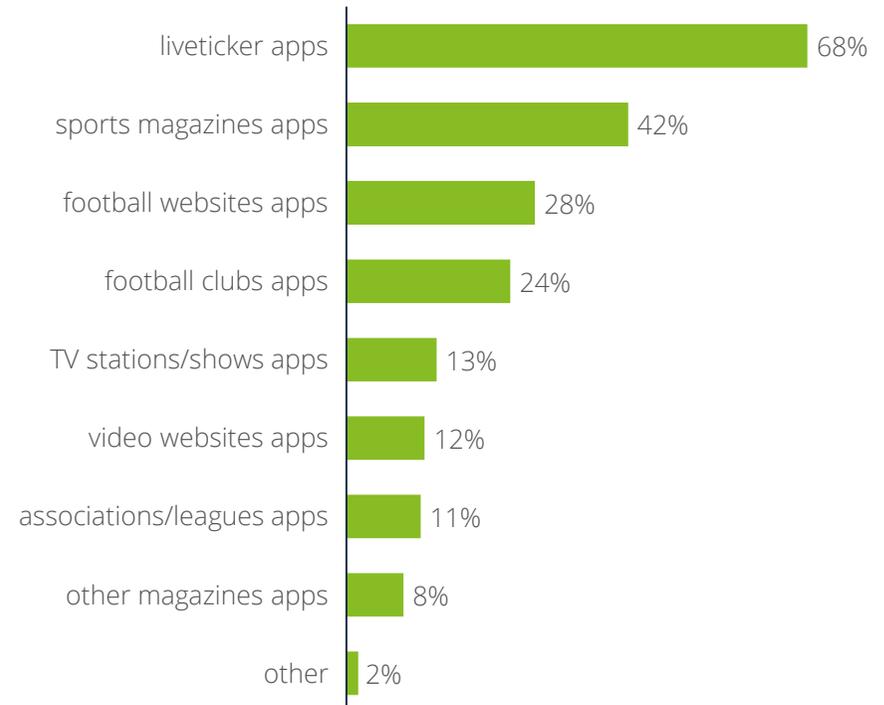
Apps provide a huge potential to clubs who want to reach out to their fans

Reaching out to the fans – information channels

Channels used to get information about football

| Channel | % |
|---|-----|
| TV stations and shows | 77% |
| apps | 40% |
| friends and acquaintances | 38% |
| websites | 34% |
| newspapers and magazines | 29% |
| radio shows | 27% |
| search engines (e.g. Google) | 20% |
| sports magazines | 19% |
| social media | 17% |
| teletext | 17% |
| online forums | 9% |
| blogs | 6% |
| podcasts | 3% |
| other | 3% |
| none of the above, I don't follow football news | 3% |

App types used to get information about football



"Where do you get information about football - also beyond the current World Cup? "; Multi Pick, n=3,030

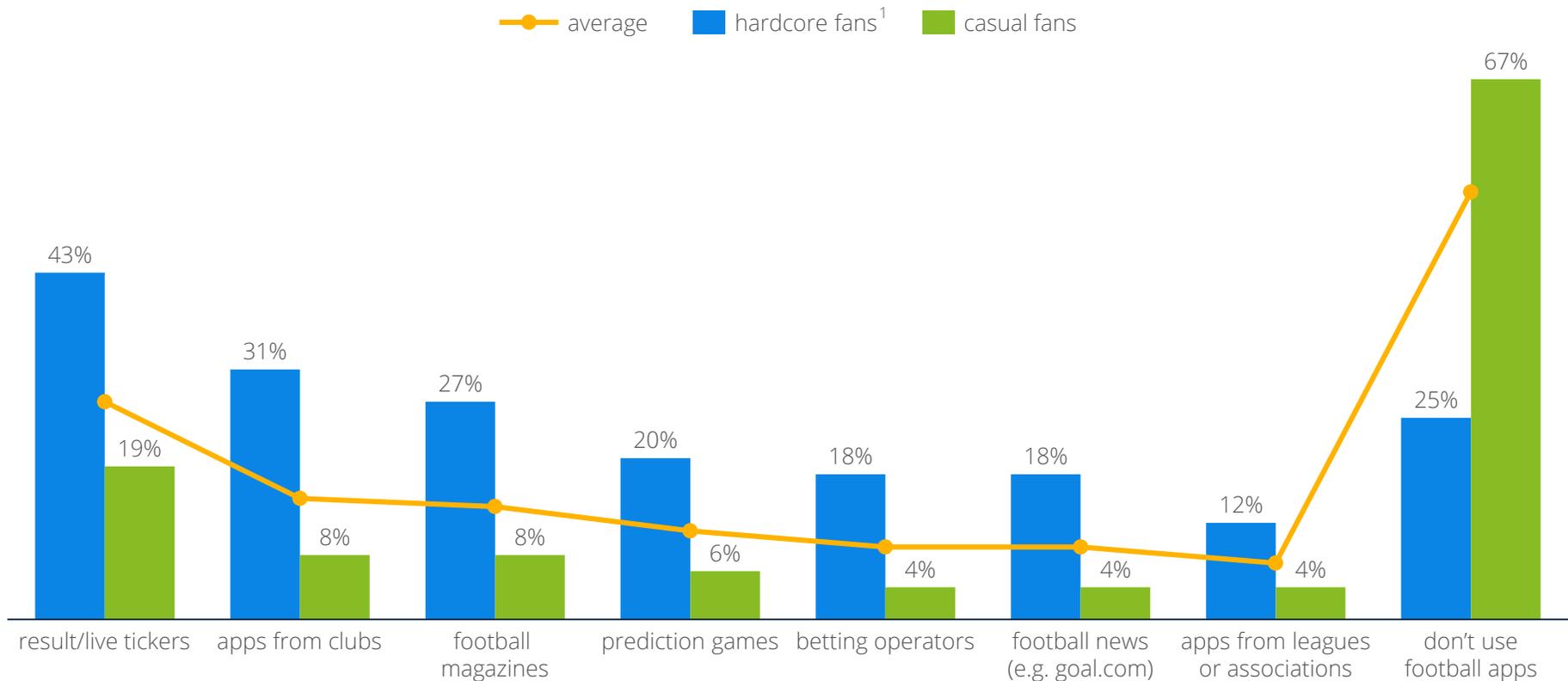
"And what kind of apps do you use to get information about football?"; Multi Pick; n=1,223, respondents who get information about football via apps

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

Hardcore fans are far more likely to use football apps overall

Reaching out to the fans – football apps

Used football app types by fan engagement



1: Hardcore fans are fans of at least one club, inform themselves about football several times per week during the season and own fan merchandise. Additionally, they might have a favorite club, watch football several times a week, visit a stadium regularly or be a member of a football fan club.

"What kinds of football apps do you use?"; Multi Pick; n=3,030; n=1,007 hardcore fans, n=2,023 casual fans (see methodology)

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

ACTIVATING THE FANS



Clubs activate fans in 4 areas: In the stadium, on social media, as representatives and in fan clubs

Activating the fans - overview

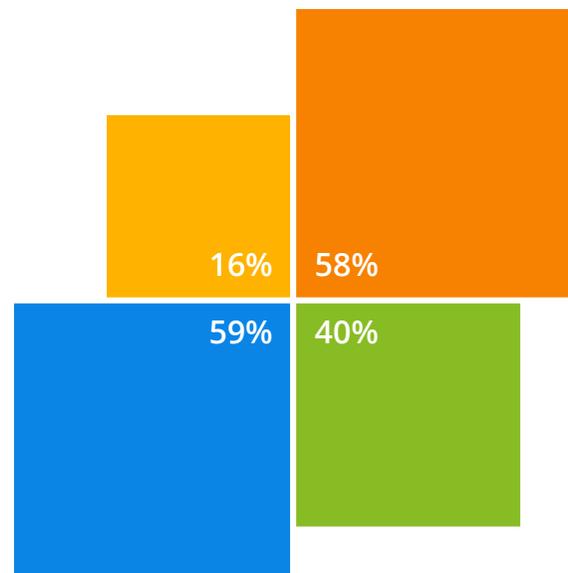
Fan activation, average of own fans (favorite club) per club

Fan Clubs

On average, 16% of a club's fans (favorite club) are active in an organized fan club or a fan community

Stadium visits

On average, 58% of a club's fans (favorite club) have attended a football match at a stadium in the past 12 months



On average, 59% of a club's fans (favorite club) own kits, scarfs, flags or t-shirts

Willingness to Represent

On average, 40% of a club's fans (favorite club) have been using social media for football related topics in the past 3 months

Social Media

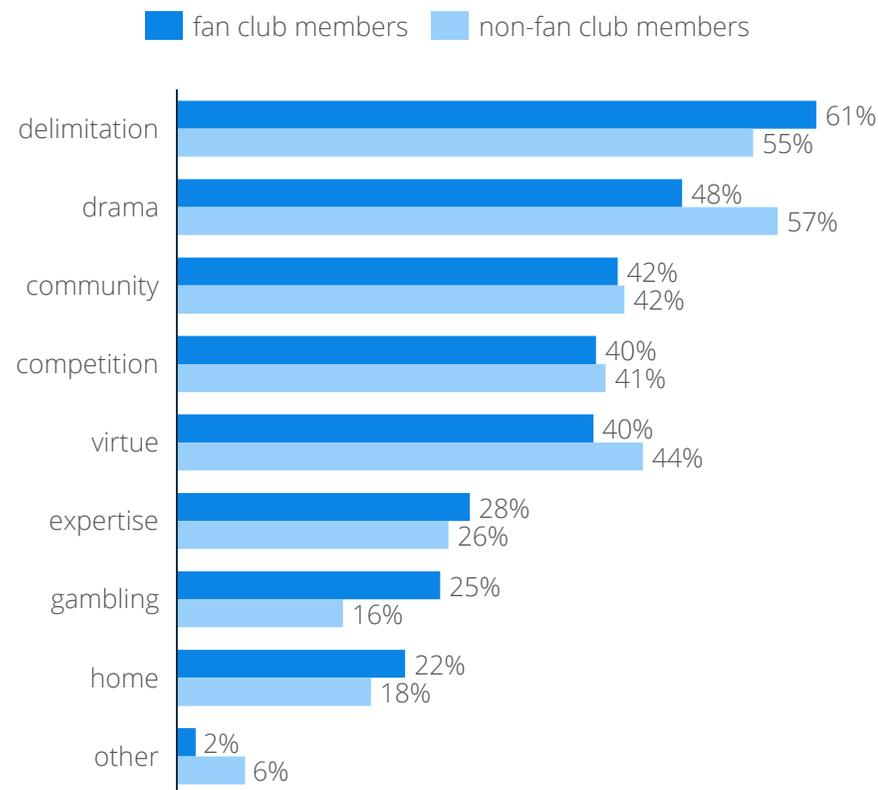
"How often have you seen a football match at a stadium in the past 12 months?"; "Which of the following things related to football have you done on social networks in the past 3 months?"; Multi Pick; "Do you own merchandise products by your favorite Bundesliga club?"; Multi Pick; "Are you member of a fan club of a football club or another organized fan community?"; Multi Pick; n=3,030

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

More delimitation, less drama – members of fan clubs tend to have different priorities than non-members

Activating the fans – fan clubs

Dimensions of football appeals



Appeals of football to fan club members

In the European Football Benchmark survey, respondents were asked about what made football particularly appealing to them. The answers (e.g. rivalry with fans from other clubs, fairness, to party hard, etc.) were then assigned to the dimensions that can be seen on the left.

In general, members of a football fan club and non-members of a fan club are not largely different in what they find particularly appealing about football.

Aspects that were cumulated under the terms „delimitation" and „gambling" appeal more to fan club members than to non-members, while non-members seek more drama and virtue.

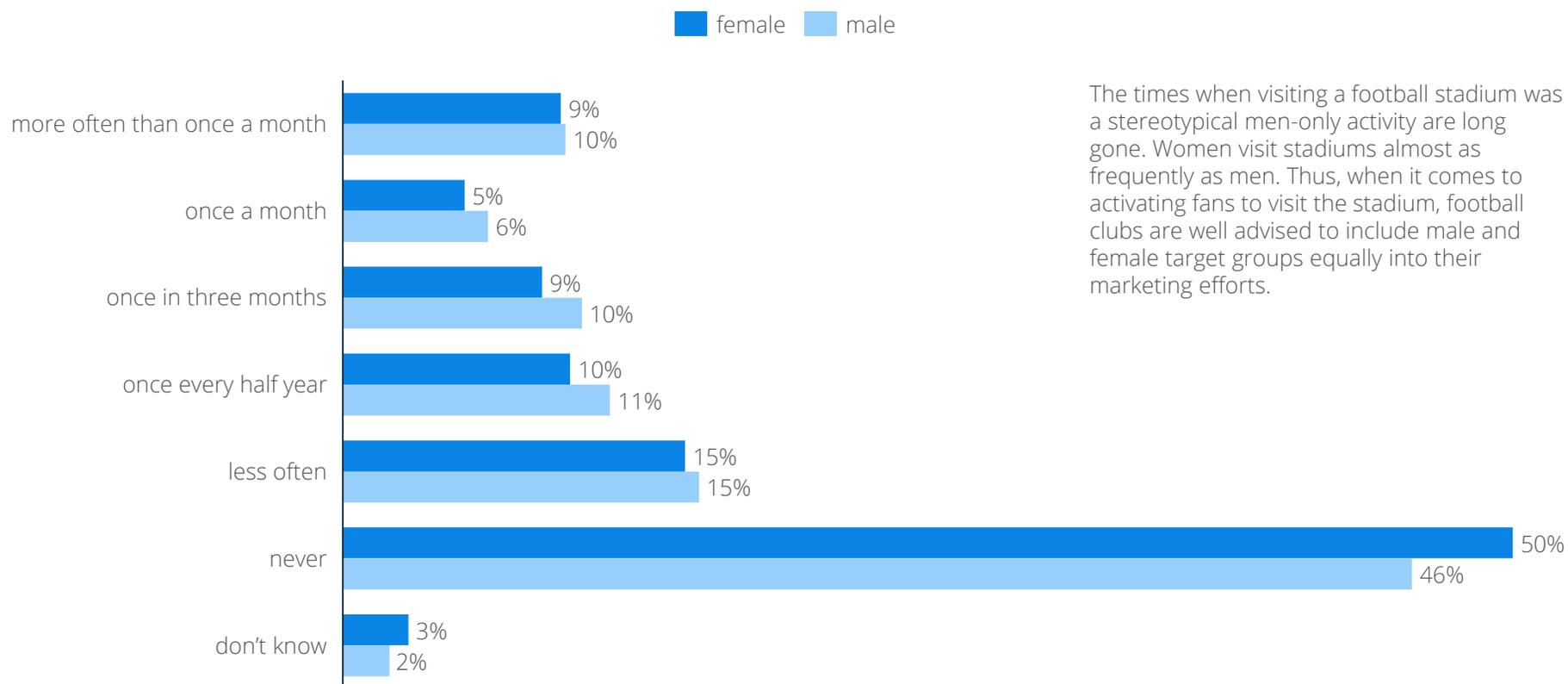
"Please think about football in general. Which of the following things make football particularly appealing to you? Please choose up to 5 answers.;" Multi Pick; n=3,030

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

Visiting a stadium is no longer “reserved” to men...

Activating the fans – stadium visits

Stadium visits, past 12 months

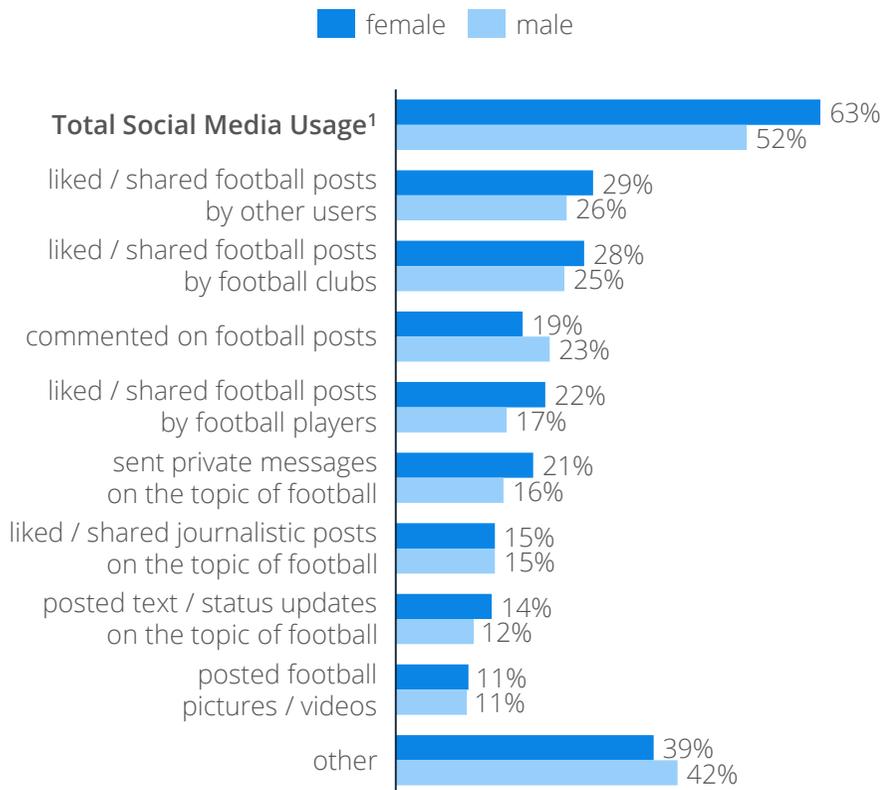


The times when visiting a football stadium was a stereotypical men-only activity are long gone. Women visit stadiums almost as frequently as men. Thus, when it comes to activating fans to visit the stadium, football clubs are well advised to include male and female target groups equally into their marketing efforts.

...and social media activity related to football is more common among women

Activating the fans – social media

Social media activities related to football, past 3 months



63% of female football fans but only 52% of male fans use social media. The same tendency becomes evident when looking at individual social media activities: 28% of female fans liked or shared posts by football clubs in the past 3 months, while only 25% of male fans did so.

In order for fans to like or share content by a football club, they need to produce it in the first place. In other words, **continuously producing attractive content** is a pivotal part of any attempt by clubs to activate their fans on social media.

Commenting on football posts is the third most frequent social media activity related to football. Clubs that want to take part in the social media life of their fans should **not hold back on producing surprising, provoking or controversial content**: posts that encourage commenting and sharing.

And although the total number of female fans is slightly lower than the number of male fans, **addressing a female audience in social media may pay off because it implies a higher probability to get liked, commented and reposted.**

1: all respondents

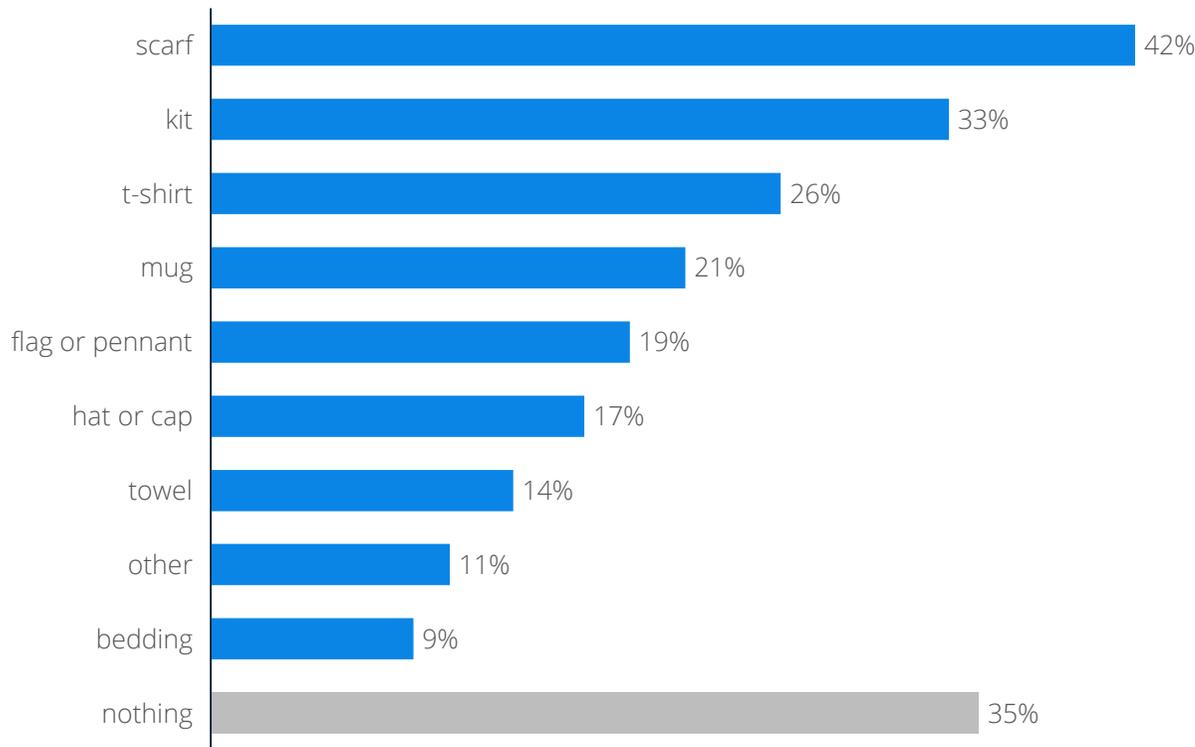
"Which of the following things related to football have you done on social networks in the past 3 months?"; Multi Pick; n=1,742 respondents who actively used social networks with regards to football in the past 3 months

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

Scarfs and kits are the most common merchandise products used by fans to represent their club

Activating the fans – willingness to represent

Ownership of merchandise products of favorite Bundesliga club



Ownership of any merchandise among own fans (favorite club)

| # | Club | % |
|----|----------------------------------|-----|
| 1 | Bayer 04 Leverkusen ¹ | 81% |
| 2 | FC Schalke 04 | 81% |
| 3 | SV Werder Bremen | 78% |
| 4 | VfB Stuttgart | 71% |
| 5 | Hamburger SV | 71% |
| 6 | 1. FSV Mainz 05 ¹ | 70% |
| 7 | 1. FC Köln | 69% |
| 8 | Borussia Mönchengladbach | 69% |
| 9 | Eintracht Frankfurt | 68% |
| 10 | FC Bayern München | 65% |
| 11 | Borussia Dortmund | 65% |
| 12 | Hannover 96 | 64% |
| 13 | 1. FC Nürnberg | 64% |
| 14 | Fortuna Düsseldorf | 63% |
| 15 | Hertha BSC | 59% |
| 16 | FC Augsburg ¹ | 59% |
| 17 | VfL Wolfsburg ¹ | 57% |
| 18 | TSG 1899 Hoffenheim ¹ | 50% |
| 19 | RB Leipzig | 40% |
| 20 | SC Freiburg | 37% |

1: Low base, less than 25 respondents in this subgroup

"The following questions are about merchandise. Do you own merchandise products by your favorite Bundesliga club?"; Multi Pick; n=2,437,

respondents who have a favorite Bundesliga club

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

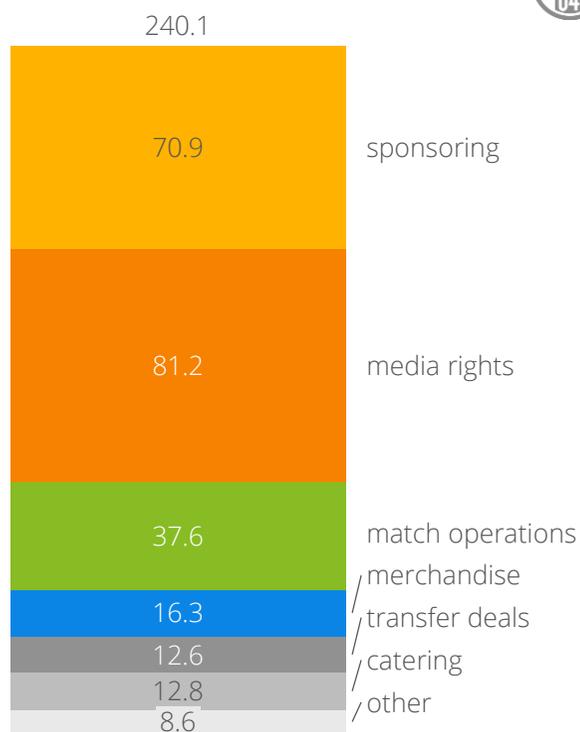
MONETIZING THE FANS



Fans can be monetized through sponsoring, TV and streaming, tickets, and merchandise

Monetizing the fans - overview

Sales of FC Schalke 04 in million € in 2017¹



Some sales categories are directly dependent on fans

Sponsoring

On average, kit sponsors reach an awareness of 56% among football fans, with the top ranking sponsor Deutsche Telekom having an awareness of 86% and the lowest ranking sponsor Orthomol 20%.

Media rights: TV and streaming

On average, 93% of football fans follow football games via TV or streaming. Free TV and radio are still the most used channels.

Match operations: Tickets

50% of football fans have seen a football match at a stadium in the past 12 months, 17% own a season ticket for home matches of their favorite club.

Merchandise

On average, 18% of all football fans buy or get a new kit of their favorite club every season. But of those fans who already own a kit, 68% buy a new kit every season.

1: FC Schalke 04 Annual Report 2017

"How often have you seen a football match at a stadium in the past 12 months?"; n=3,030; "Do you have a season ticket for home matches of your favorite Bundesliga club?"; n=1,363, respondents who attended a football match at a stadium in the past 12 months and who have a favorite Bundesliga club; "Which of the following brands do you know at least by name?"; Multi Pick; n=3,030; "How often do you usually watch football during season (live matches, summaries and post-match reports)?"; n=3,030; "Do you usually buy or get a kit of your favorite Bundesliga club every season?"; Multi Pick; n=3,030

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

Deutsche Telekom and Volkswagen are the most well-known sponsors, but REWE is the winner of hearts

Monetizing the fans – sponsor benchmarks

Deutsche Telekom, Volkswagen and Red Bull are the three most well-known kit sponsors in the Bundesliga, their awareness scores range from 86% to 80%.

Quite remarkable: Among the top 5 kit sponsors by awareness there are 3 (former) state companies (Deutsche Telekom, Volkswagen, and Postbank).

In terms of positive attitudes towards the kit sponsors, the same 5 companies lead the pack, only in a much different order: **REWE** is now number one, with 44% like the company. The second in line, **Deutsche Telekom**, only reaches 27%.

Awareness of kit sponsors

| # | Sponsor | % |
|----|-------------------------|-----|
| 1 | Deutsche Telekom | 86% |
| 2 | Volkswagen | 82% |
| 3 | Red Bull | 81% |
| 4 | REWE | 81% |
| 5 | Postbank | 80% |
| 6 | Emirates | 70% |
| 7 | Wiesenhof | 70% |
| 8 | Gazprom | 68% |
| 9 | Mercedes-Benz-Bank | 63% |
| 10 | SAP | 59% |
| 11 | Nürnberger Versicherung | 58% |
| 12 | Barmenia | 56% |
| 13 | Bet-at-home.com | 53% |
| 14 | WWK Versicherungen | 44% |
| 15 | Evonik Industries | 41% |
| 16 | Indeed | 30% |
| 17 | Schwarzwaldmilch | 24% |
| 18 | Heinz von Heiden | 23% |
| 19 | Kömmerling | 21% |
| 20 | Orthomol | 20% |

Likeability of kit sponsors

| # | Sponsor | % |
|----|-------------------------|-----|
| 1 | REWE | 44% |
| 2 | Deutsche Telekom | 27% |
| 3 | Volkswagen | 25% |
| 4 | Postbank | 19% |
| 5 | Red Bull | 17% |
| 6 | Mercedes-Benz-Bank | 15% |
| 7 | Emirates | 15% |
| 8 | Wiesenhof | 14% |
| 9 | SAP | 14% |
| 10 | Schwarzwaldmilch | 10% |
| 11 | Nürnberger Versicherung | 7% |
| 12 | Barmenia | 7% |
| 13 | Evonik Industries | 7% |
| 14 | Gazprom | 7% |
| 15 | Indeed | 6% |
| 16 | Bet-at-home.com | 5% |
| 17 | Orthomol | 5% |
| 18 | Heinz von Heiden | 4% |
| 19 | WWK Versicherungen | 3% |
| 20 | Kömmerling | 3% |

"Which of the following brands do you know at least by name?"; Multi Pick; n=3,030; "Which of the following brands do you personally like?"; Multi Pick; n=2,962, respondents who know at least one sponsor by name
Source: [Statista European Football Benchmark 2018](#)

Whether sponsor and club are perceived to match, depends – a lot of potential to be used or wasted

Monetizing the fans – sponsor-club fit

Good club fit¹ as perceived by supporters²

| # | Club & Sponsor | % |
|----|--|-----|
| 1 | TSG 1899 Hoffenheim & SAP | 96% |
| 2 | SC Freiburg & Schwarzwaldmilch | 93% |
| 3 | VfL Wolfsburg & Volkswagen | 90% |
| 4 | VfB Stuttgart & Mercedes-Benz-Bank | 88% |
| 5 | RB Leipzig & Red Bull | 87% |
| 6 | 1. FC Nürnberg & Nürnberger Versicherung | 87% |
| 7 | FC Bayern München & Deutsche Telekom | 79% |
| 8 | 1. FC Köln & REWE | 76% |
| 9 | Fortuna Düsseldorf & Orthomol | 76% |
| 10 | Bayer 04 Leverkusen & Barmenia | 74% |
| 11 | Borussia Dortmund & Evonik Industries | 73% |
| 12 | Hannover 96 & Heinz von Heiden | 73% |
| 13 | FC Augsburg & WWK Versicherungen | 69% |
| 14 | Eintracht Frankfurt & Indeed | 66% |
| 15 | Hamburger SV & Emirates | 60% |
| 16 | Hertha BSC & Bet-at-home.com | 59% |
| 17 | 1. FSV Mainz 05 & Kömmerling | 58% |
| 18 | Borussia Mönchengladbach & Postbank | 55% |
| 19 | FC Schalke 04 & Gazprom | 54% |
| 20 | SV Werder Bremen & Wiesenhof | 50% |

There are huge margins in perceived Bundesliga sponsor-club fits. **Hoffenheim and SAP** are seen as the most fitting duo with 96% of the club's supporters attesting them a good fit.

Werder Bremen and Wiesenhof are the least fitting Bundesliga sponsor-club combination in the perception of the supporters with only 50% attesting them a good fit.

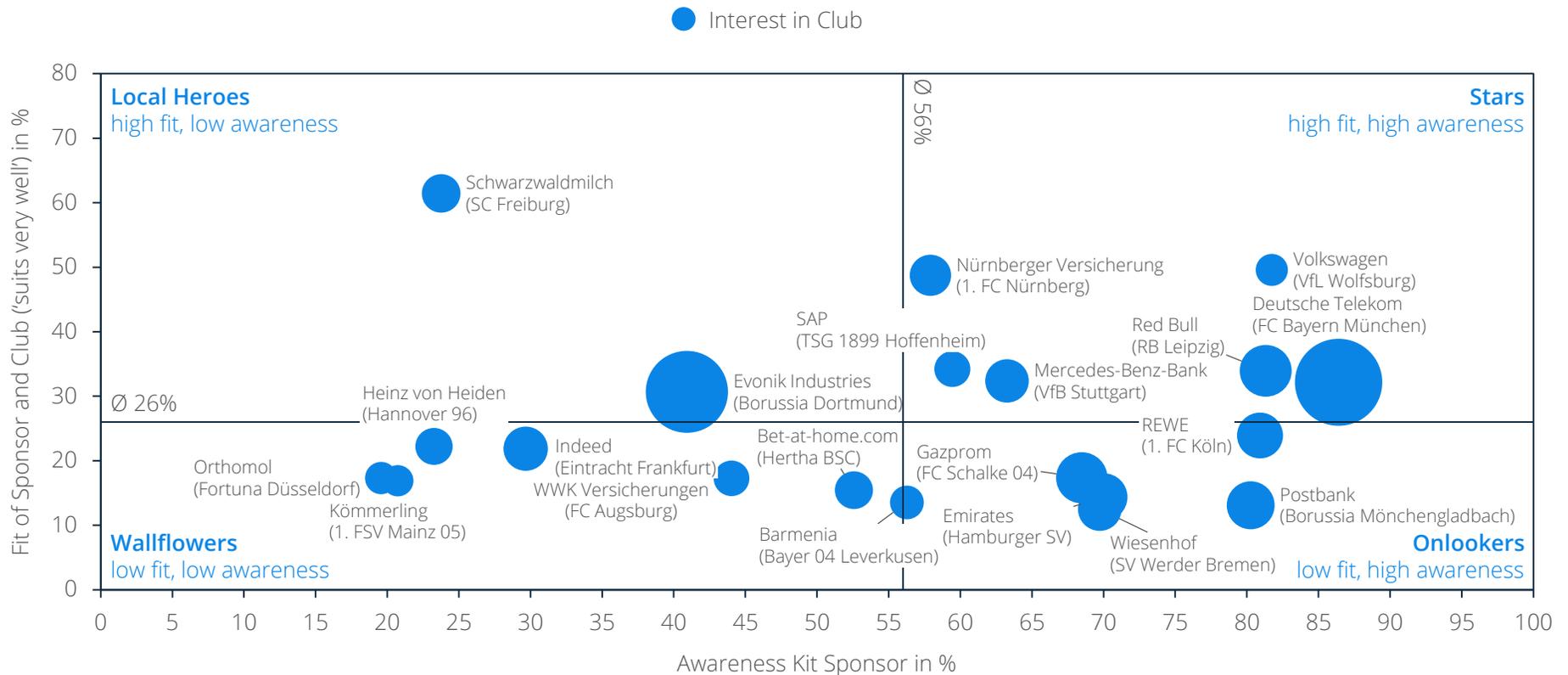
The perceived fit between club and sponsor is **connected to how their images are conveyed.**

1: Answers "suits very well" and "suits rather well" 2: Based on questions about relation to clubs (favorite club, fans and "thrills me / love it" or "like it")
"How well does the brand ... suit the club ...?"; only supporters² of the respective club
Source: [Statista European Football Benchmark 2018](#)

6 out of 20 sponsors are stars: They have an above-average awareness among fans and a high club fit

Monetizing the fans – sponsor classification

Kit sponsors by awareness and fit to club



"Which of the following Bundesliga clubs are you especially interested in (e.g. results, transfers, news)?"; Multi Pick; n=3,030; "Which of the following brands do you know at least by name?"; Multi Pick; n=3,030; "How well does the brand ... suit the club ...?"; only supporters of the respective club

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

Schwarzwaldmilch proves how a locally rooted Sponsor can build an image among it's key audience

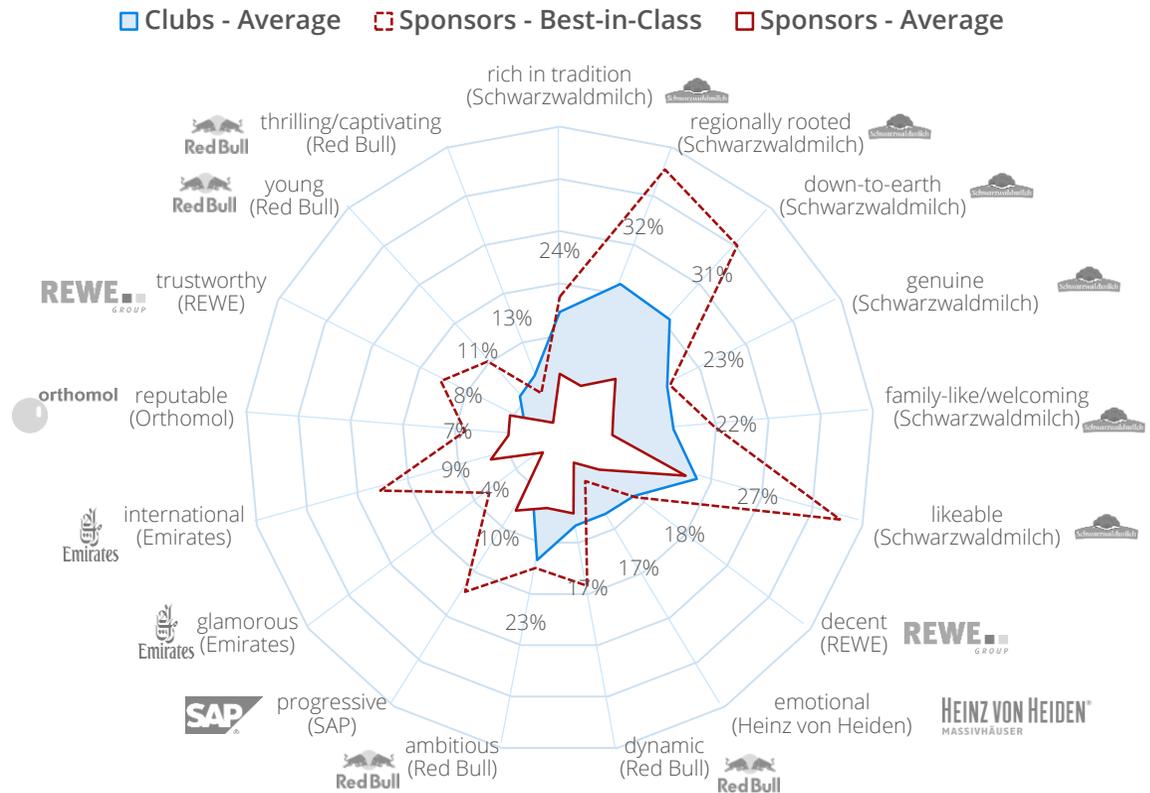
Monetizing the fans – kit sponsor image (1/2)

Local hero Schwarzwaldmilch wins in 6 out of 17 categories

Although the company is one of the sponsors that fans in general are least aware of, local hero **Schwarzwaldmilch** wins in 6 out of 17 categories among those fans who know each brand. Second best when it comes to the number of best-in-class categories is **Red Bull**, kit Sponsor of **RB Leipzig**.

Emirates, **REWE** and **Orthomol** are three sponsors with a below-average club fit, who nevertheless score best-in-class results in one or several categories.

Top- and average image scores



"Which of the following are the main characteristics that are typical of the brand ...? Please choose a maximum of 5." Multi Pick; randomized sample of respondents who know the sponsor at least by name (see methodology)
 Source: [Statista European Football Benchmark 2018](#)

Schwarzwaldmilch makes the top 5 ten times, REWE and Orthomol eight times each

Monetizing the fans – kit sponsor image (2/2)

Top 5 scoring sponsors per image attribute

| # | rich in tradition | % |
|---|-------------------------|-----|
| 1 | Schwarzwaldmilch | 27% |
| 2 | Volkswagen | 27% |
| 3 | Wiesenhof | 25% |
| 4 | Nürnberger Versicherung | 19% |
| 5 | Deutsche Telekom | 19% |

| # | regionally rooted | % |
|---|-------------------------|-----|
| 1 | Schwarzwaldmilch | 56% |
| 2 | Wiesenhof | 21% |
| 3 | REWE | 19% |
| 4 | Nürnberger Versicherung | 18% |
| 5 | Kömmerling | 16% |

| # | down-to-earth | % |
|---|-------------------------|-----|
| 1 | Schwarzwaldmilch | 50% |
| 2 | REWE | 26% |
| 3 | Nürnberger Versicherung | 21% |
| 4 | Wiesenhof | 20% |
| 5 | Postbank | 19% |

| # | genuine | % |
|---|------------------|-----|
| 1 | Schwarzwaldmilch | 24% |
| 2 | Orthomol | 17% |
| 3 | REWE | 17% |
| 4 | Deutsche Telekom | 14% |
| 5 | Kömmerling | 14% |

| # | family-like/welcoming | % |
|---|-----------------------|-----|
| 1 | Schwarzwaldmilch | 29% |
| 2 | REWE | 26% |
| 3 | Orthomol | 17% |
| 4 | Wiesenhof | 15% |
| 5 | Heinz von Heiden | 10% |

| # | likeable | % |
|---|------------------|-----|
| 1 | Schwarzwaldmilch | 56% |
| 2 | REWE | 54% |
| 3 | Deutsche Telekom | 34% |
| 4 | Volkswagen | 30% |
| 5 | Orthomol | 29% |

| # | decent | % |
|---|------------------|-----|
| 1 | REWE | 18% |
| 2 | Schwarzwaldmilch | 16% |
| 3 | Indeed | 15% |
| 4 | Orthomol | 13% |
| 5 | Barmenia | 12% |

| # | emotional | % |
|---|------------------|----|
| 1 | Heinz von Heiden | 9% |
| 2 | Orthomol | 9% |
| 3 | Bet-at-home.com | 8% |
| 4 | Kömmerling | 8% |
| 5 | Indeed | 7% |

| # | dynamic | % |
|---|-------------------|-----|
| 1 | Red Bull | 28% |
| 2 | SAP | 27% |
| 3 | Emirates | 23% |
| 4 | Indeed | 21% |
| 5 | Evonik Industries | 21% |

| # | progressive | % |
|---|--------------------|-----|
| 1 | SAP | 34% |
| 2 | Emirates | 27% |
| 3 | Indeed | 26% |
| 4 | Deutsche Telekom | 25% |
| 5 | Mercedes-Benz-Bank | 20% |

| # | glamorous | % |
|---|--------------------|-----|
| 1 | Emirates | 17% |
| 2 | Mercedes-Benz-Bank | 10% |
| 3 | Gazprom | 6% |
| 4 | Red Bull | 5% |
| 5 | Indeed | 5% |

| # | international | % |
|---|---------------|-----|
| 1 | Emirates | 36% |
| 2 | SAP | 32% |
| 3 | Gazprom | 27% |
| 4 | Volkswagen | 26% |
| 5 | Red Bull | 24% |

| # | trustworthy | % |
|---|--------------------|-----|
| 1 | REWE | 25% |
| 2 | Schwarzwaldmilch | 25% |
| 3 | Orthomol | 17% |
| 4 | WWK Versicherungen | 14% |
| 5 | Deutsche Telekom | 13% |

| # | young | % |
|---|-------------------|-----|
| 1 | Red Bull | 20% |
| 2 | Indeed | 12% |
| 3 | Orthomol | 10% |
| 4 | Schwarzwaldmilch | 7% |
| 5 | Evonik Industries | 6% |

| # | thrilling/captivating | % |
|---|-----------------------|-----|
| 1 | Red Bull | 10% |
| 2 | Kömmerling | 8% |
| 3 | Bet-at-home.com | 8% |
| 4 | Indeed | 6% |
| 5 | Schwarzwaldmilch | 4% |

"Which of the following are the main characteristics that are typical of the brand ...? Please choose a maximum of 5." Multi Pick; randomized sample of respondents who know the sponsor at least by name (see methodology)

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

Clubs & sponsors that want to be perceived as fitting should look out for matches in image dimensions

Monetizing the fans – club and sponsor image

Image scores of club and kit sponsor in %

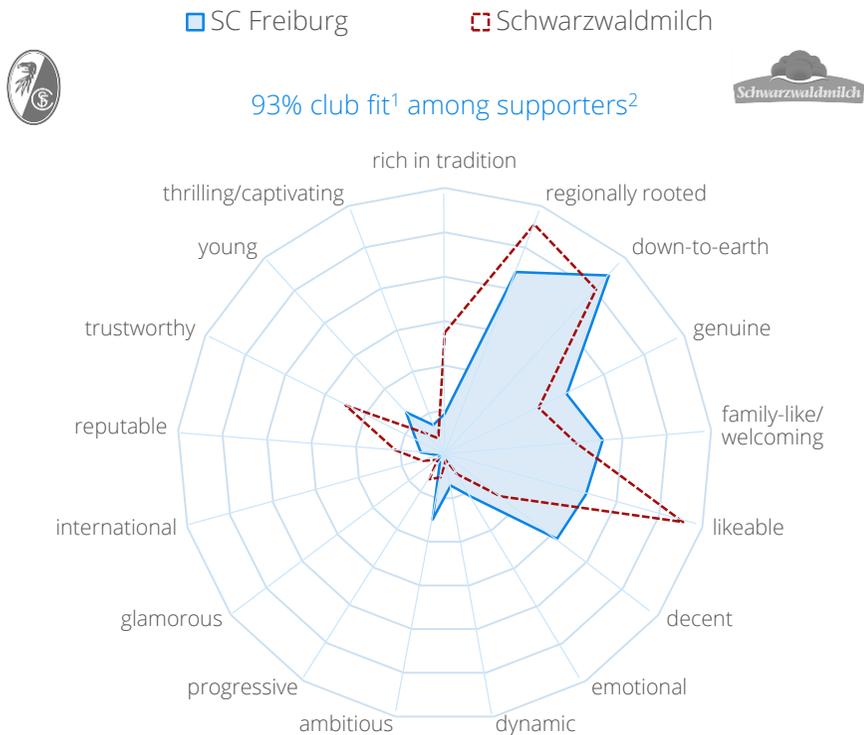
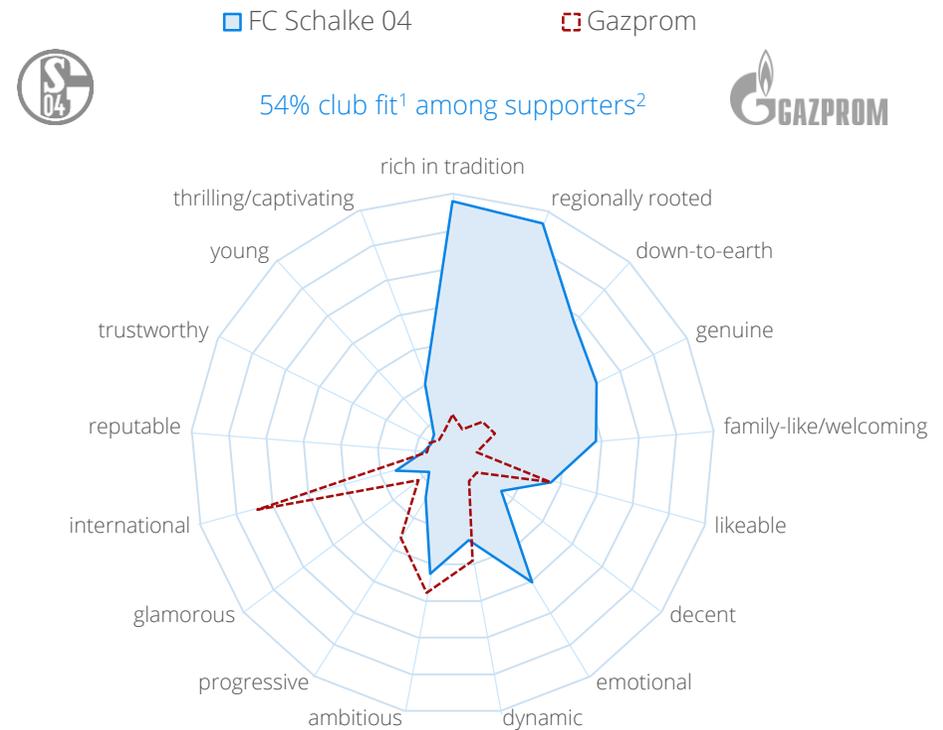


Image scores of club and kit sponsor in %



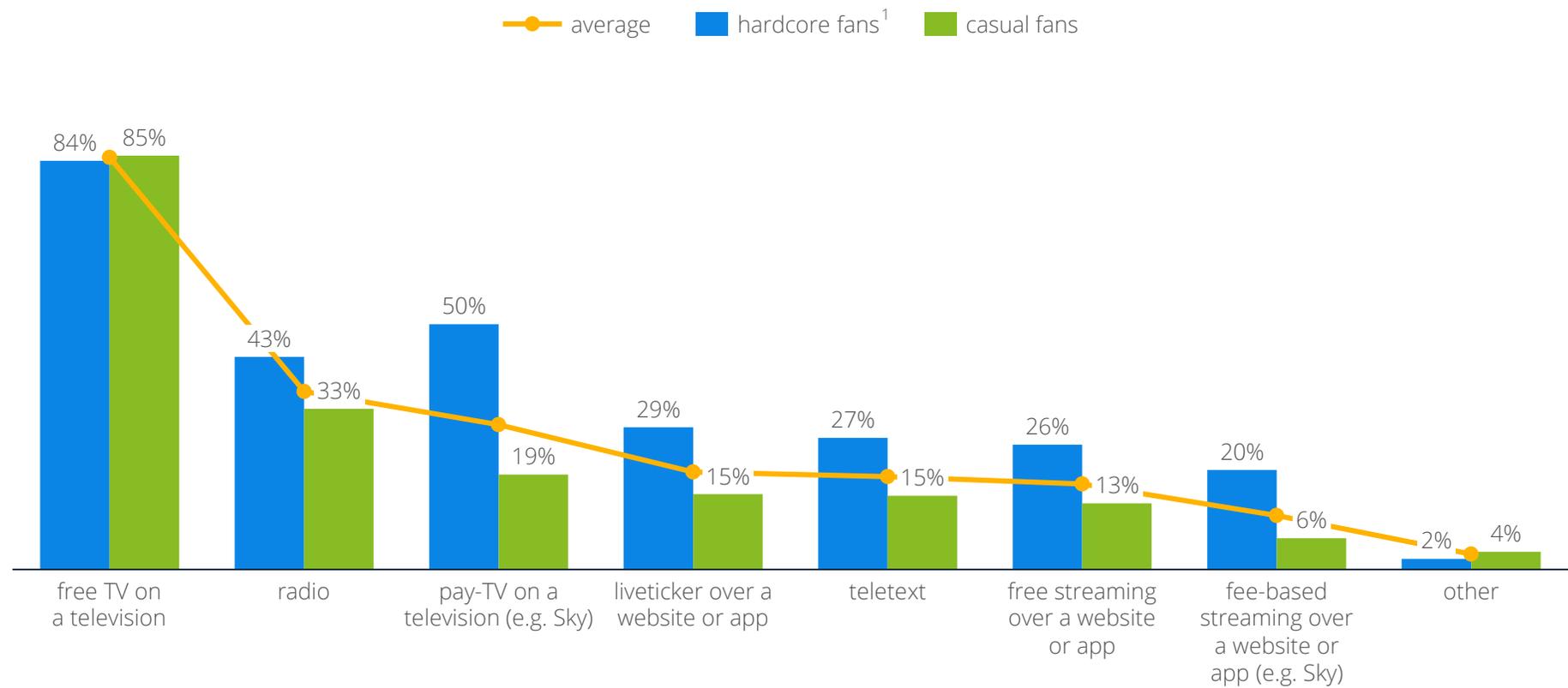
1: Answers "suits very well" and "suits rather well" 2: Based on questions about relation to clubs (favorite club, fans and "thrills me / love it" or "like it") "How well does the brand ... suit the club ...?"; only supporters² of the respective club; "Which of the following are the main characteristics that are typical of ...? Please choose a maximum of 5."; Multi Pick; randomized sample of respondents who are fans or supporters¹ of the club; "Which of the following are the main characteristics that are typical of the brand ...? Please choose a maximum of 5." Multi Pick; randomized sample of respondents who know the sponsor at least by name (see methodology)

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

Hardcore fans are willing to pay for TV and streaming while casual fans prefer free TV and radio

Monetizing the fans – TV and streaming

Channels used to follow football games



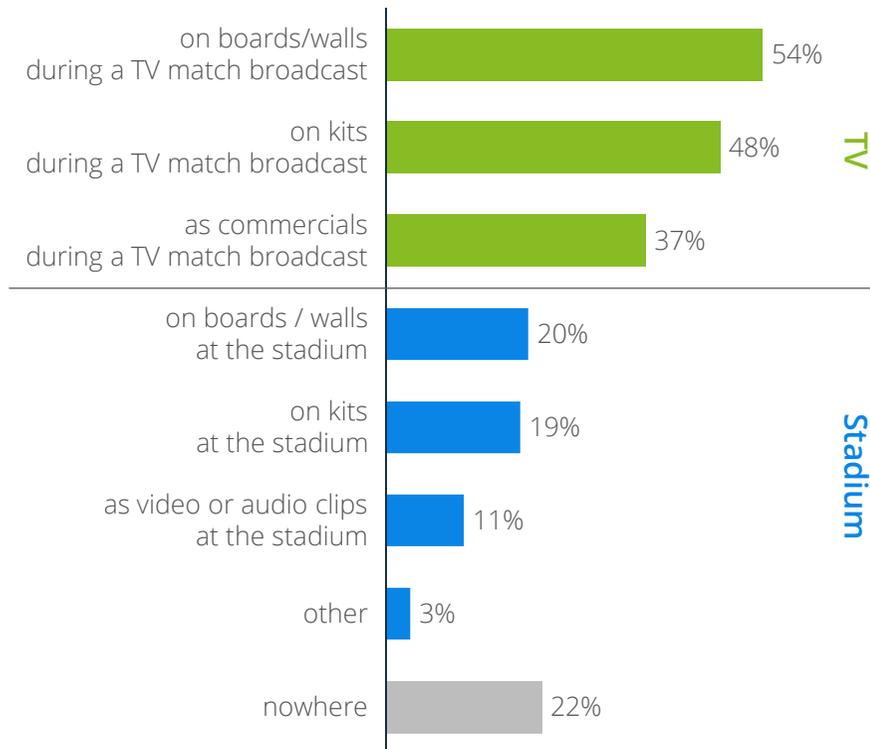
1: Hardcore Fans are fans of at least one club, inform themselves about football several times per week during the season and own fan merchandise. Additionally, they might have a favorite club, watch football several times a week, visit a stadium regularly or be a member of a football fan club.

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

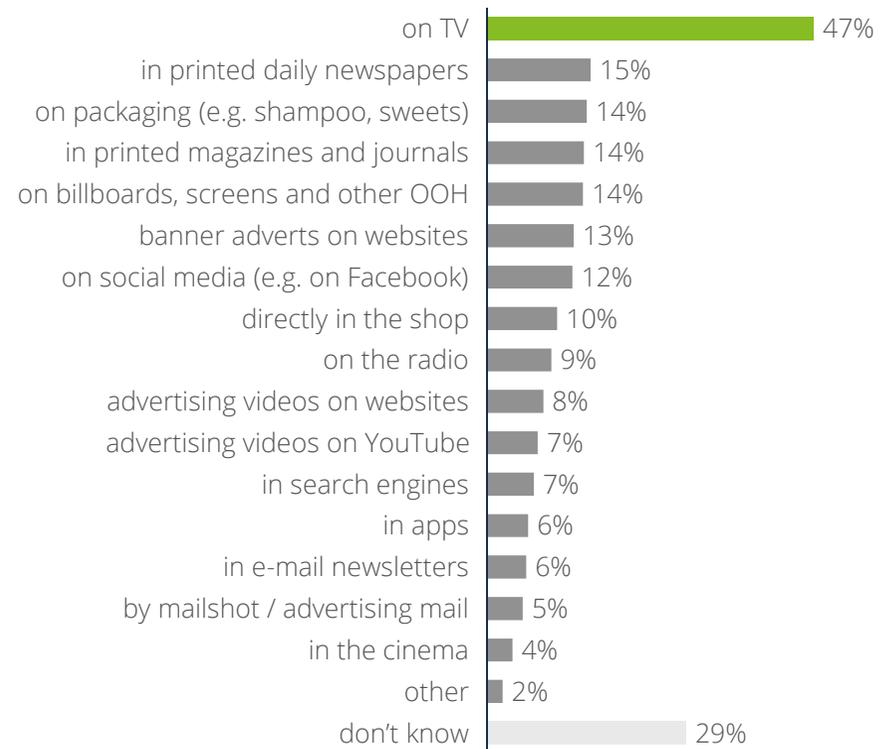
TV is the most frequent sponsoring and advertisement touchpoint

Monetizing the fans – sponsoring touchpoints

Awareness of sponsoring in football, past 4 weeks



Touchpoints with football sponsors' ads, past 4 weeks



"Where have you noticed sponsoring or adverts in football in the past 4 weeks?"; Multi Pick; n=3,030; "And where have you noticed adverts by football sponsors in the past 4 weeks?"; Multi Pick; n=3,030
Source: [Statista European Football Benchmark 2018](#)

Selling tickets is (still) a multi-channel business

Monetizing the fans – tickets

Purchasing tickets for football games **via retail channels** is still most common, closely followed by **online** purchase at the club or from other ticket agencies.

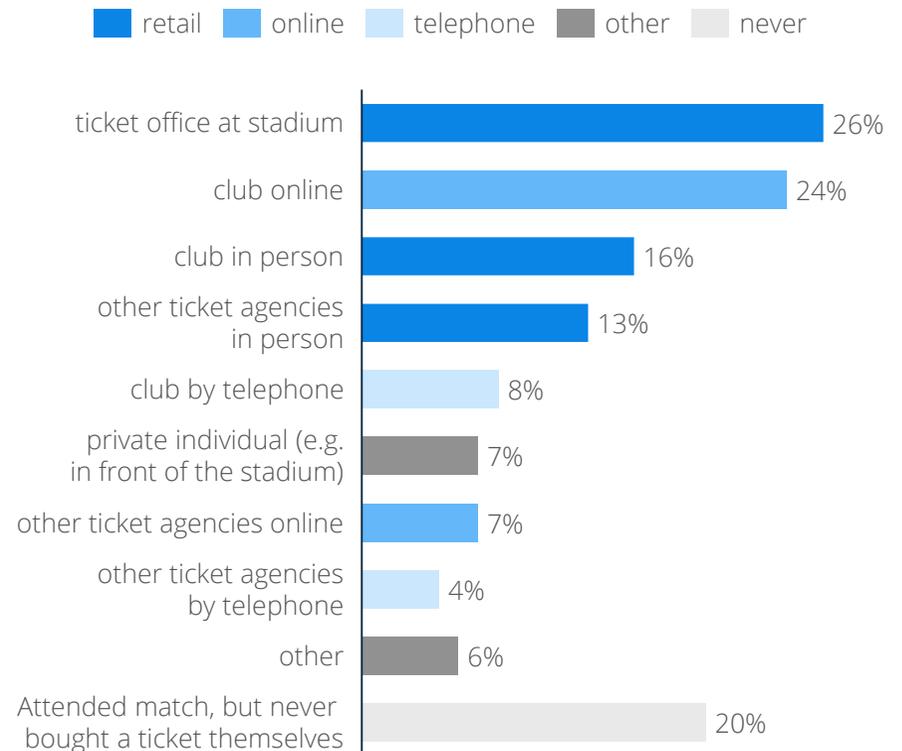
Only 20% of respondents who attended a football match at a stadium in the past 12 months have never bought a ticket for a football match themselves.

The topic of ticketing is also interesting due to the diversity of purchase channels ranging from retail to online and telephone and more.

The good old **ticket office at the stadium** and **clubs' online ticket shops** each cater to about 25% of football ticket buyers.

Reselling tickets, although not under all circumstances legal, is a factor, too: 7% of respondents have bought a ticket for a football game from another private individual (e.g. in front of the stadium) in the past 12 months.

Purchase channels of tickets for football games, past 12 months

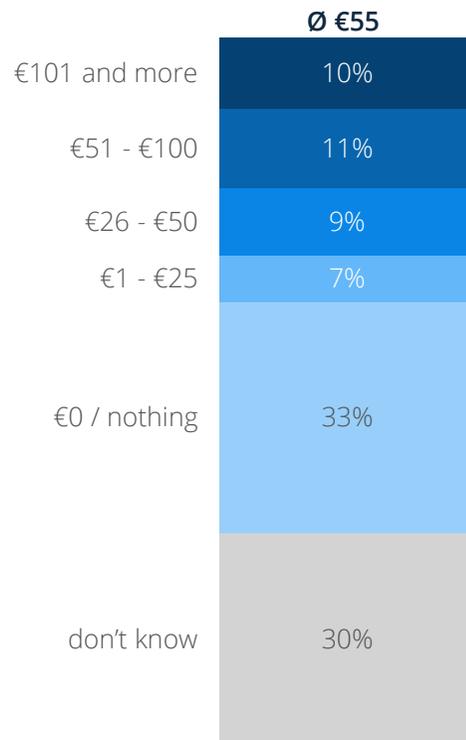


"Where have you bought tickets for football games in the past 12 months (single matches or season tickets)?"; Multi Pick; n=1,517, respondents who attended a football match at a stadium in the past 12 months
Source: [Statista European Football Benchmark 2018](#)

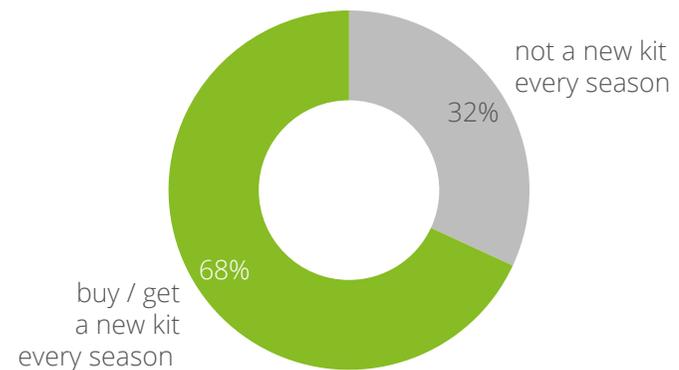
On average, fans spent €55 on merchandise of their favorite Bundesliga club in the past 12 months

Monetizing the fans – merchandise

Spending on merchandise of favorite Bundesliga club, past 12 months



Buying frequency of new kit of favorite Bundesliga club for people owning a kit



While one third of fans spent no money on merchandise of their favorite club in the past 12 months, 10% spent €101 and more. With fans spending an average of €55, fan merchandise is a valuable revenue source for a club.

Concerning kits, football clubs still have room to equip their fans. Most of the clubs use two to three new kits every season. But 32% of the respondents who own at least one kit do not buy or get a new kit every season, while an impressive 68% buy or get a new kit of their favorite Bundesliga club every season.

"How much have you spent on merchandise products of your favorite Bundesliga club in the past 12 months? If you're not sure, please estimate."; Open Question; n=2,437, respondents who have a favorite Bundesliga club; "Do you usually buy or get a kit of your favorite Bundesliga club every season?"; n=812, respondents who own at least one kit of their favorite Bundesliga club

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

Your Contacts



Robin Juhl

Customer Relations Europe

TEL +49 40 28484 10

E-MAIL kundenservice@statista.com



Lodovica Biagi

Operations Manager UK

TEL +44 203 709 9960

E-MAIL eu.support@statista.com

WWW.STATISTA.COM

European Football Benchmark

5 LEAGUES¹ | 15.000+ FANS | 100+ CLUBS | 100+ SPONSORS

Expert Tool:

DIY analysis, cross-tabulation, customized target groups, export in CSV format

TOPICS

- Fandom
- Clubs
- Sponsoring
- Football games in the media
- Stadium visits
- Merchandise
- Etc.

DEMOGRAPHICS & TARGET GROUPS

- Age, gender, profession, etc.
- Fan profile
- Advertising touchpoints
- Media brands
- Sports in general
- Attitudes & politics
- Etc.

LEAGUES

Premier League (England) | Bundesliga (Germany) | La Liga (Spain) | Serie A (Italy) | Ligue 1 (France)

1: At launch, data on the Premier League (England) and the Bundesliga (Germany) are available. Data on the first divisions in France, Italy and Spain will be released soon.

 [Browse the European Football Benchmark online](#)