

Ten years of demographic analysis of the football players' labour market in Europe

Drs Raffaele Poli, Loïc Ravenel and Roger Besson

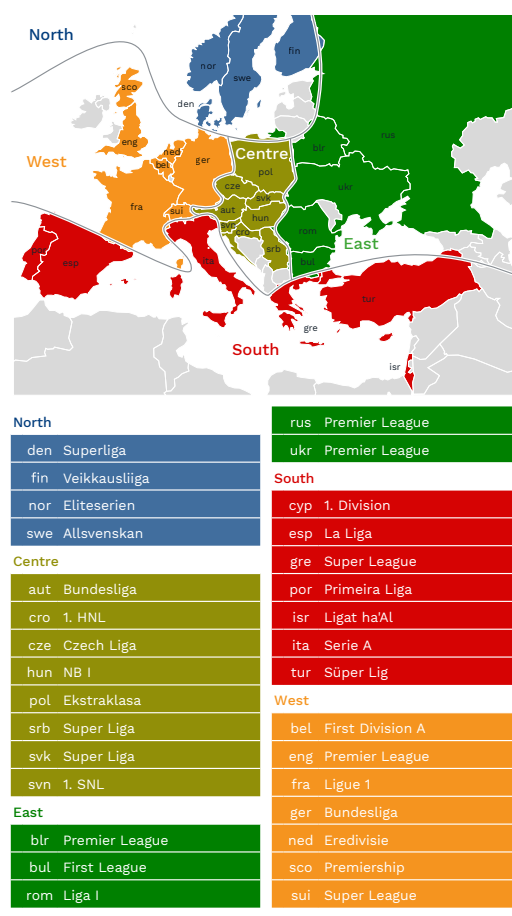
1. Introduction

The long-term work carried out within the CIES Football Observatory focuses, in particular, on the demographic analysis of the football players' labour market. It is with pride that we are able to provide an overview of the principle changes observed over the past decade.

The study covers three areas: training (club-trained players), migration (expatriate footballers) and mobility (players having changed team during the year). The sample is made up of teams having participated in 31 top division leagues of UEFA member associations between 2009 and 2018.

To be included, a player had to be present on the 1st of October in the first team squad of the clubs analysed. Moreover, he must have already played in domestic league games during the current season or, this being not the case, to have played matches in adult championships during each of the two preceding seasons (B-teams not included). The second and third goalkeepers have been taken into account in all cases.

Figure 1: study sample and geographical areas

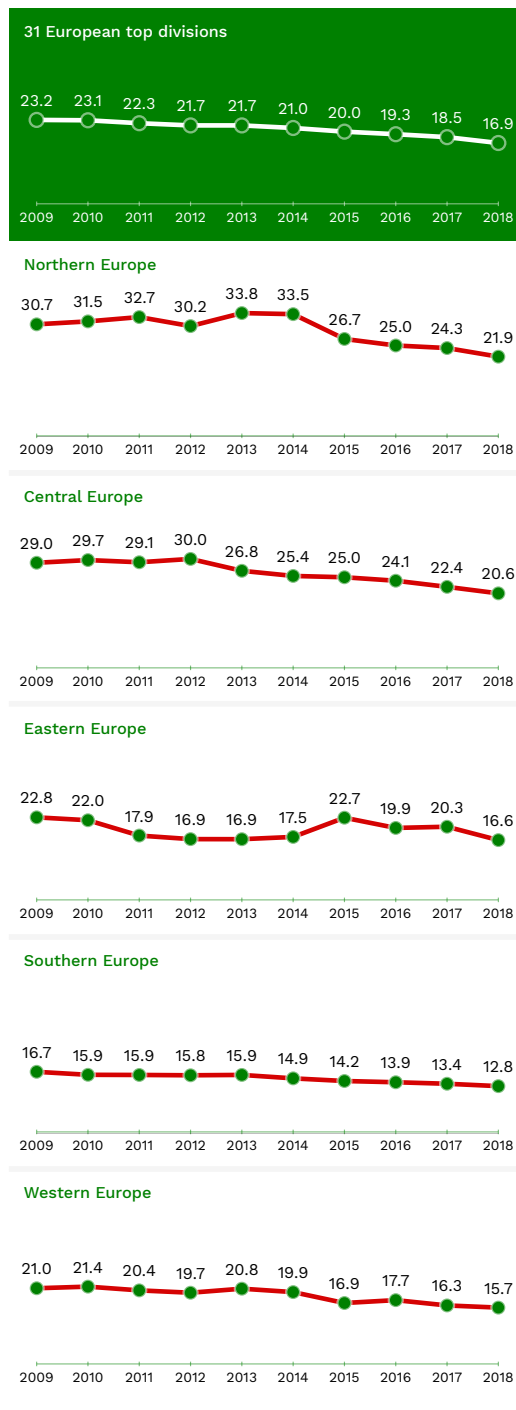


2. Training

In accordance with the UEFA definition, club-trained players are those having spent at least three seasons between 15 and 21 years of age in the employer team. The proportion of this category of footballers has never been as low as on the 1st of October 2018: 16.9% (-6.3% in ten years). The decrease observed during the last year has been the greatest ever recorded (-1.6%). The average annual drop has increased from 0.37% between 2009 and 2013 to 1.02% between 2014 and 2018.

A decrease was observed all over the continent. Northern and Central Europe remain the zones with the highest proportion of club-trained footballers. However, a sharp decline was also observed since 2009: -8.8% and -8.4% respectively. In all areas, the values measured in 2018 are the lowest ever recorded. Southern Europe has the lowest overall value (12.8%).

Figure 2: % of club-trained players by geographical zone



Different processes explain the decrease observed. An increasing proportion of clubs do not give as much importance to the presence of players from their youth settings in the first team squad. Moreover, the less well-off clubs have ever greater difficulties to hold onto their best players, who tend to converge more and more quickly on the wealthiest clubs.

The proportion of players trained by the 100 most productive training clubs has gone from 21.8% in 2009 to 26.4% in 2018. The percentage of footballers still in the training period playing for a club that did not train them has increased from 40.5% in 2009 to 53.9% in 2018. These changes reflect the precocious concentration of talents within a select group of dominant clubs in a strongly speculative context in which many players who have been transferred early move again quickly to other horizons.

On the 1st of October 2018, the extreme values for club-trained players by league were observed in Israel (28.0%) and Italy (7.4%). In 30 championships out of 31, the level recorded in 2018 was lower than the average measured over the past decade. The greatest negative gaps were observed for Croatia (-15.7%), Sweden (-11.2%) and Slovakia (-8.6%).

Figure 3: % of club-trained players by league

	01/10/2018	2009/2018	Evol
ISR Ligat haAl	28.0	31.8	▼
SVN 1. SNL	27.5	31.3	▼
SVK Super Liga	26.8	35.4	▼▼
CZE Czech Liga	25.8	29.8	▼
FIN Veikkausliiga	25.8	30.9	▼▼
SUI Super League	24.5	25.2	▼
NOR Eliteserien	23.6	27.9	▼
BLR Premier League	22.2	26.5	▼
DEN Superliga	21.7	29.1	▼▼
AUT Bundesliga	21.6	23.4	▼
UKR Premier League	21.5	22.7	▼
NED Eredivisie	19.4	22.5	▼
HUN NB I	19.4	25.2	▼▼
FRA Ligue 1	18.8	22.7	▼
SRB Super Liga	18.0	22.1	▼
ESP La Liga	17.8	23.0	▼▼
SWE Allsvenskan	17.3	28.5	▼▼▼
SCO Premiership	17.0	24.7	▼▼
CRO 1. HNL	15.4	31.1	▼▼▼
GER Bundesliga	15.0	15.1	▼
ROM Liga I	14.2	17.1	▼
POL Ekstraklasa	13.5	16.4	▼
RUS Premier League	13.0	13.8	▼
CYP 1. Division	12.7	12.6	▲
BUL First League	12.6	18.5	▼▼
GRE Super League	12.6	13.3	▼
ENG Premier League	11.0	13.7	▼
TUR Süper Lig	8.6	8.8	▼
BEL First Division A	8.4	13.9	▼▼
POR Primeira Liga	7.7	9.9	▼
ITA Serie A	7.4	9.0	▼

3. Migration

The study of migration is carried out using the concept of expatriate. This notion defines players having grown up outside of the national association of their employer club and having gone abroad for football-related reasons. This definition has the advantage of isolating migrations directly linked to the practice of football. Indeed, the foreign players having grown up in the association of their employer team are not considered as expatriates.

During the last decade, the proportion of expatriates in the leagues studied has increased from 34.7% to a record level of 41.5% in 2018. An acceleration of the process of internationalisation of squads has been observed. We went from an annual growth of 0.55% between 2009 and 2013 to an average increase of 1.17% between 2014 and 2018. The proportion of expatriates increased in all the zones analysed. The latter are particularly numerous in Southern (51.8%) and Western Europe (48.9%).

Figure 4: % of expatriates by geographical zone



The rise in the proportion of expatriates is essentially linked to the migrations of players from UEFA member countries. In absolute terms, their number has increased by 736 individuals between 2009 and 2018. During the same period, the number of footballers coming from countries outside of UEFA has fallen by 61. The proportion of Europeans abroad among the total number of expatriates has thus gone from 58.5% to 65.5%.

The values by league vary between 66.2% in Cyprus and 16.3% in Serbia. In 26 of 31 championships studied, the percentage measured in 2018 was superior to the average for the decade. The biggest increases were for Croatia (+19.2%), Slovakia (14.2%), Bulgaria (+10.9%) and Slovenia (+10.0%). On the 1st of October 2018, expatriates accounted for more than half of the squads in a record number of nine championships, including three from the big-5 (England, Italy and Germany).

The evolution in the percentage of players having already migrated over the course of their career also allows us to account for the process of the internationalisation of the football players' labour market. The proportion of footballers in this situation has increased from 46.4% in 2009 to a record level of 56.9% in 2018. In a decade, the average age of the first migration has decreased from 22.2 to 21.8 years. The percentage of players having left as minors among those who migrated during their career has also increased from 8.2% to 9.6%.

Figure 5: % of expatriates by league

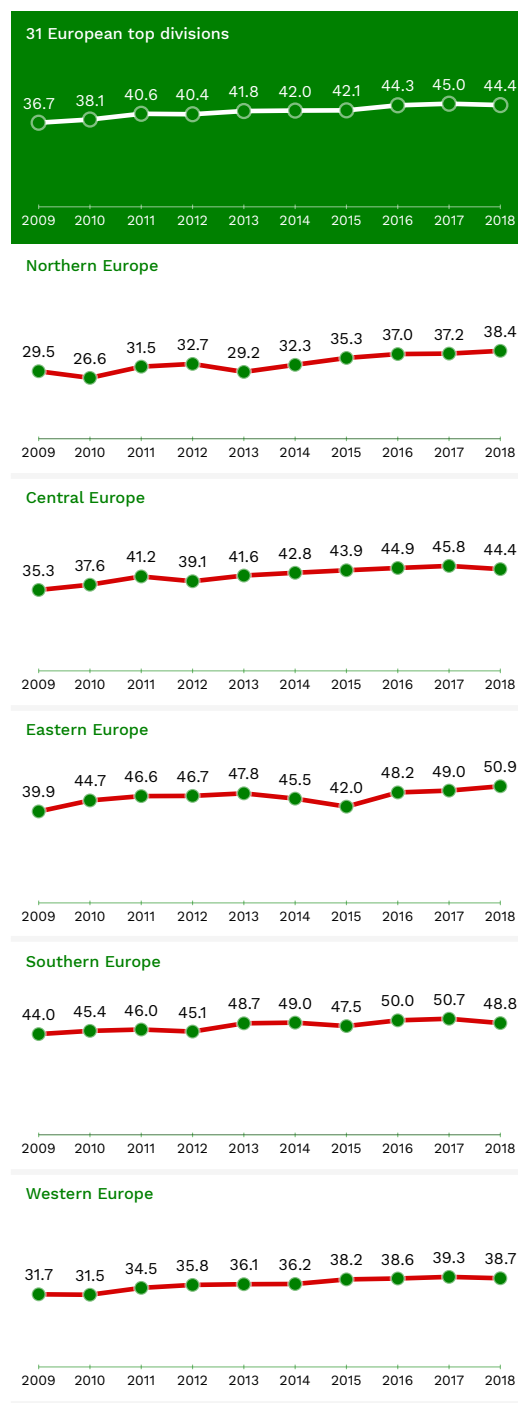
	01/10/2018	2009/2018	Evol
CYP 1. Division	66.2	68.1	▼
ENG Premier League	62.7	59.0	▲
BEL First Division A	62.5	54.2	▲▲
TUR Süper Lig	61.9	54.1	▲▲
POR Primeira Liga	61.3	54.8	▲▲
ITA Serie A	56.5	52.4	▲
SCO Premiership	51.8	46.0	▲▲
GER Bundesliga	50.8	46.2	▲
GRE Super League	50.4	47.5	▲
SVK Super Liga	42.3	28.1	▲▲▲
CRO 1. HNL	42.1	22.9	▲▲▲
POL Ekstraklasa	40.1	32.5	▲▲
HUN NB I	39.5	32.2	▲▲
SUI Super League	39.3	39.1	▲
ESP La Liga	38.6	38.1	▲
DEN Superliga	38.2	30.5	▲▲
RUS Premier League	38.1	42.9	▼
FRA Ligue 1	36.9	31.2	▲▲
BUL First League	36.6	25.7	▲▲▲
ROM Liga I	36.5	31.0	▲▲
SVN 1. SNL	36.1	26.1	▲▲
NED Eredivisie	34.9	35.3	▼
FIN Veikkausliiga	32.2	26.7	▲▲
NOR Eliteserien	29.9	31.7	▼
AUT Bundesliga	28.6	27.3	▲
BLR Premier League	27.9	22.7	▲▲
SWE Allsvenskan	27.3	27.1	▲
CZE Czech Liga	25.3	22.6	▲
ISR Ligat ha'Al	23.5	22.9	▲
UKR Premier League	19.2	28.1	▼▼
SRB Super Liga	16.3	15.3	▲

4. Mobility

The percentage of players recruited during the year in clubs' squads is a good indicator to measure mobility in the labour market. Footballers coming directly from youth academies are not considered as new recruits. In 2018, the percentage of players having joined their employer club during the year was 44.4%. This is a lower value than for 2017 (-0.6%), but well above the overall percentage for the last decade (+2.9%).

In Eastern and Southern Europe, on the 1st October 2018, half of squad members were not present a year previously. This proportion is considerably lower in Western and Northern Europe. Nevertheless, since 2009, an increase has been recorded in all geographical zones: between +4.8% in Southern Europe and +11.0% in Eastern Europe. A fall in mobility growth rate was observed over the last five years (+0.60% on average per year) in comparison with the five preceding ones (+1.27%).

Figure 6: % of players recruited during the year by geographical zone



In 27 championships out of 31, the percentage of new recruits in 2018 was greater than the average measured over the last decade. The volume of transfers has increased particularly in Croatia (+16.4%) and Ukraine (+10.7%). Turkey and England are the only two countries where the proportion of players signed over the course of the year in 2018 was lower than that measured during the first census in 2009.

On the 1st October 2018, the proportion of new recruits was at least half in a record number of eleven championships. Over the whole period, the lowest value was measured for the Danish top division (29.9%). In 2018, the most stable teams were to be found in Germany (32.1% of players recruited during the year) and England (32.9%). With the exception of Serie A, all the big-5 leagues are among those whose clubs change players the least.

In an economic context of strong polarisation, stability is becoming a luxury that few clubs (and players) can afford. As a result, it is not surprising to find that wealthy clubs are at the top of the rankings of teams with the least amount of different players listed during the last decade: Bayern Munich (76 players), Real Madrid (76) and Barcelona (79). With 178 different players, the Croatian side NK Istra has the highest figure among clubs present throughout in our sample.

Figure 7: % of players recruited during the year by league

	01/10/2018	2009/2018	Evol
CYP 1. Division	60.4	57.9	▲
CRO 1. HNL	59.4	43.0	▲▲▲
ROM Liga I	56.3	50.2	▲▲
BLR Premier League	54.0	46.6	▲▲
GRE Super League	53.9	49.2	▲
POR Primeira Liga	52.4	52.1	▲
SRB Super Liga	51.8	51.1	▲
BUL First League	51.1	51.2	▼
UKR Premier League	50.8	40.1	▲▲▲
SCO Premiership	50.5	40.6	▲▲
ISR Ligat haAl	50.0	45.5	▲
ITA Serie A	47.0	45.4	▲
BEL First Division A	45.7	41.2	▲
FIN Veikkausliiga	43.5	38.5	▲
TUR Süper Lig	43.2	48.1	▼
RUS Premier League	42.6	42.2	▲
CZE Czech Liga	42.6	40.0	▲
SVK Super Liga	42.3	39.7	▲
POL Ekstraklasa	41.4	40.4	▲
SVN 1. SNL	41.0	40.7	▲
ESP La Liga	40.2	38.4	▲
HUN NB I	40.1	40.2	▼
NED Eredivisie	40.0	36.6	▲
SWE Allsvenskan	38.7	30.7	▲▲
NOR Eliteserien	38.0	33.4	▲
FRA Ligue 1	37.9	33.6	▲
AUT Bundesliga	36.9	33.9	▲
SUI Super League	36.2	35.9	▲
DEN Superliga	34.3	29.9	▲
ENG Premier League	32.9	35.4	▼
GER Bundesliga	32.1	31.8	▲

5. Conclusion

The surveys carried out by the CIES Football Observatory allow us to reveal very clear trends. The footballers' labour market in Europe is becoming deterritorialised by a decreasing presence of club-trained players, a stronger proportion of expatriate footballers and greater mobility. These processes can be seen as problematic from the point of view of the role that clubs are supposed to undertake in their local environment.

More and more teams are geared towards the short-term. In an increasingly segmented and speculative context, owners and executives tend to optimise financial returns on the transfer market to the detriment of more eminently sporting considerations. An increasing number of players consider their team as a mere stepping-stone to more lucrative markets. Agents and the entourage also play a decisive role in this regard. The increasing instability that results limits the sporting competitiveness of an ever greater number of teams, to the advantage of the wealthiest and better structured clubs, who increasingly dominate the proceedings.