

Sample



# Projected macro-trends for European football in the period 2022-2027

This analysis intends to identify some discussion points concerning the future development of the football industry in Europe.

Season 2021-22 has been book-ended by two events that represent a microcosm of all the challenges that are already facing and will continue to face football in Europe: the postponed Euro-2020, which was finally played across Europe in what was hoped for as the big 'return to normality' but amidst different sanitary regulations and with Covid-19 still not fully contained and flaring up at several moments during the following months, and the Champions League final in Paris that was itself rescheduled from the original venue of St Petersburg, as it was no longer appropriate due to the ongoing aggression of Russia in Ukraine, which has brought major upheaval to the European continent on many different levels.

We will propose some trends in the three categories of Sport, Business and Community, and then look at individual countries/regions to identify some key pressure points for the coming years.



## SPORT

1. The source of playing talent for clubs is continuing to evolve: by now more than a quarter of players in top divisions across Europe are expats, with a growth of almost 3% over the last 5 years and particularly significant increases in certain European countries (e.g. France +27%, Netherlands +60%, Germany +31%, England +25%, Croatia +25%, Denmark +43%, Portugal +28%, Austria +51%, Belgium +26%, Spain +14%). This suggests that signing foreign players is a feature of all types of leagues from countries of varying sizes, but it brings certain issues to the fore, concerning the scouting, selection and transfer of those players.
2. At the same time, practice of football has been particularly impacted by the Coronavirus pandemic, and it remains to be seen whether it will recover to pre-pandemic levels or remain lower. If it does, the potential pool of playing talent on the domestic market will be reduced accordingly, and clubs will have fewer players to select from, leading to more competition and other pressures. It will also require clubs to take much more care about how they develop their own players, to ensure fewer drop-outs from the system and a better productivity overall.
3. There will be more demand for on-field and near-field technical staff by clubs, driven both by enhanced club licensing and growing complexity of football operations, as well as a bigger focus on developing players for those that choose that approach. But quality coaching provision is highly dependent on the efforts of individual national associations, and some countries still have shortages of qualified technical staff from youth specialists to Pro License coaches, whilst some other positions such as scouting, sport science, sport medicine, sport psychology, performance analysis, academy and pro team management are not always provided for by the football associations.
4. The transfer market will remain volatile and linked to economic fortunes of clubs, which have been significantly reduced by the Covid pandemic and will also be affected by the economic aftermath of the war in Ukraine, at least for the foreseeable future, negatively impacting the ability of clubs to rely on transfer income to close budget deficits as previously.
5. Evolution of competitions both on domestic and European levels will continue: on the domestic side, the role of leagues in driving commercial revenue will need to be strengthened in those countries where the full potential of the domestic football industry is either not being fully utilised, or is not enough to lead so sustainable levels of commercial income, leading to further discussions on regionalisation or seeking other solutions. On the European level, the



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