The background of the image is a vibrant green grassy field. In the top left corner, there are two white, curved stripes that resemble the laces of a soccer ball. In the bottom right quadrant, the text is displayed.

SoccerJersey  
of the Year  
2012

↳ The Fans

↳ The Fashion

↳ The Finance

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# Preface

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First of all it is important to point out what this study is **NOT**. This study is **not** a scientific publication claiming scientific validity in the results. This award is **not** backed by any industry association or otherwise supported by industry bodies. This publication has **not** been sponsored nor has it received financial support from any company. In this sense the results can be considered objective.

This study is an investigation into the intricacies of the soccer jersey industry. The study is titled "soccer jersey of year 2012" because it intends to bring light over water by running the numbers and applying rankings to the findings. The basic idea is to look at the jerseys from 3 different perspectives: the eyes of the fans, the eyes of the fashion designers, and financially by the numbers. This structure runs through the entire publication whether we look at the jerseys, the name and number sets, or the players.

The data used is partly from a Danish context, partly global. The advantage of this origin is that it is fairly representative in terms of presenting a global view. Denmark is a small country with a small league. Thus most fans support teams internationally and the media as such pays as much attention to international football as it does to the domestic league. The data from a .com domain in English is by definition global these days. Combined, the two tell the story about football as a global phenomenon.

Our thanks go out to all the fans who have contributed either by voting for their choice as Soccer Jersey of the Year 2012 or by providing us with interesting and well-crafted reviews of the jerseys.

We would also like to send our thanks to those people from within the fashion industry who were so kind as to grant us a bit of their time during Fashion Week F/W in London 2013 and during Fashion Week F/W Milano 2013. Renata from Camera Moda, the students at the canteen of Istituto Marangoni Milano, Christian and Andrea from Wood Wood, James from Veja, and Oliver from Bottletop.

Finally, our thanks go out to the industry players who have provided indispensable information or promotional material without which the current publication would not be.

M. Bager  
Denmark, April 2013



Pret a Porter



# The Shirt Makers

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One of the primary symbols of a football club is its shirt. For the fan it is the primary way to show one's true colors. From a commercial point of view the shirt is also of primary importance. According to Sport + Markt, 53% of all merchandise revenues stem directly from shirt sales. Add to that that the replica shirt is also a strong driver for sales of other fan products. Volume wise adidas and Nike are by far the dominant shirt makers in the game. Together they make up 75% of total replica shirt sales. However, when it comes to design the world is flat: the entrance barrier is low in the sense that the costs of R&D and production are negligible so it is all up for grabs. Minor producers, small local or national brands have the chance to compete with the big boys on equal terms. Since this contest is not just about the design, but also about what the fans think and the financial figures underscoring the industry, we will see that adidas and Nike once again are the primary contestants. But luckily enough they are not the only ones. Out of the ten soccer jerseys on the final top 10 list, three are from miscellaneous brands, four from Nike, and three from adidas.

→ Welcome to the Soccer Jersey  
of the Year 2012 Award!

# The Voice of the Fan

The fans are at the heart of commercial sports. Without the fans there are no revenues, no interest from the general public, no expansion of audience, no sponsors, no TV deals, empty stadiums etc. Every company depends upon its customers. No customers = no business. Are fans to be considered traditional customers? Fans vary from customers in the sense that there may be no direct transactional relation between a fan and the team he supports. And even if the fan does contribute directly by purchasing tickets, cable subscriptions or merchandise, the relationship can never be deducted to a mere commercial one. It is an emotional bond. The difference between fans and consumers also runs deeper in other ways. The fan is typically very brand loyal. And because of this loyalty the fan is often very vocal. To run a professional sports team is often like holding a public office. It is a highly contested affair and every single aspect of running the team is under heavy scrutiny. Often it can sound like a cliché when fans are applauded by club management or players. Never the less they are the lifeblood bringing oxygen to the entire corpus of football. No fan blood running and the limbs would soon start to wither away.

Therefore the first criteria chosen for the jersey of the year 2012 is the opinion of the fans. We simply asked the fans which jersey do you think is the greatest for the season 12/13? No further explanation. To keep things simple and in order to create a common framework we decided to pick the nominees according to a number of international rankings: 51 clubs in total = 51 jerseys. All choices and all selections can be challenged. In sports as in other entertainment industries the concept of the star is crucial. The industries are driven by the concept of the star and the star performances. A list without Real Madrid and FC Barcelona would simply be a lot less interesting for a football audience since they are among those few "stars" around which everything revolves. So we tried to make sure that the big boys were all onboard.

The big clubs with the biggest fan bases are favored in any case since most fans are heavily skewed or even biased towards their favorite team when it comes to choose which jersey is the greatest. For the Real Madrid fan white equals virtue, honor, legacy, pureness of the game. To many others it is simply plain boring. For the same reason we asked the fans not just to vote for 1 jersey but for 5. We also tried to limit the favorite team factor by keeping the scale intervals tight: 5 points for your number 1, 4 points for number 2 etc. Many fans support one team in one country and another in a second country etc. So in that regard the fan effect cannot only be seen from first votes. On the other hand we would not want to eliminate entirely the impact of votes for one's favorite team. Everyone is influenced by something when it comes to opinions so why not by club affiliation? By the end of the day I believe we got a healthy survey result where both fan affiliation and other criteria such as aesthetics, novelty, sympathy and appeal are all represented.

We also ran a split test where the audience was split according to the question: are you a soccer fan? The results of the control group of non-soccer fans did vary somewhat from the group of dedicated fans. Though most of the top ranked jerseys were the same across the board.

The table below includes all votes taken together. This is the data used as the fan component in the ranking of the Soccer Jersey of Year 2012.

RANK	PERCENTAGE %	CLUB
1	7.9	FC Barcelona
2	5.5	Manchester United
3	4.6	AC Milan
4	4.5	Celtic
5	4.2	Real Madrid
6	3.5	Chelsea FC
7	3.5	Man City
8	3.5	Paris SG
9	3.3	St. Pauli
10	3.0	Dortmund
11	3.0	Liverpool
12	2.6	Basel
13	2.6	Shakhtar
14	2.5	Boca Juniors
15	2.4	AS Roma
16	2.4	FC Copenhagen
17	2.2	Arsenal
18	2.2	Napoli
19	2.1	FC Bayern
20	2.0	Twente
28	1.6	Juventus

The top 20 ranking of the jerseys from the fan survey for non-soccer fans. The audience was American.

RANK	CLUB
1	Celtic
2	FC Barcelona
3	Manchester United
4	St. Pauli
5	Basel
6	Paris SG
7	Manchester City
8	AC Milan
9	Shakhtar
10	AS Roma
11	FC Copenhagen
12	Sao Paulo
13	Twente
14	Flamengo
15	Fluminense
16	Boca Juniors
17	Chelsea FC
18	Liverpool
19	Real Madrid
20	Velez Sarsfield
21	Dortmund
27	Arsenal
30	Napoli
37	FC Bayern
48	Juventus

Let's try to interpret the results of the non-fan survey. The conclusion may well be that people voted for jerseys in red and blue colors, and with familiar names. Celtic is the name of a famous US basketball team the Boston Celtics. That might have been influential when it comes to having Celtic at the very top of the list. Green and white jerseys do not usually have much appeal and among the soccer fans the Celtic jersey did not make the top 10. The first white jersey on the list is Shakhtar Donetsk. The third is Sao Paulo FC. What they have in common is the use of heavy contrasting colors making the jersey much less white than for instance Real Madrid or FC Copenhagen. Copenhagen might end up with a good score because the name sounds familiar. The Arsenal and the Napoli jerseys suffer from being messy in the design. Black and white is not a popular combination, juventinos aside. Why FC Bayern ends up at number 37 out of 51 is harder to explain given that the red and gold color scheme could be deemed attractive. But maybe the gold contrast and the details in the garment did not show well in a small image. Plain red would surely not be a hit.

Finally, let's try to look at the results by color. Our sample of brown, yellow, green and black consists of only 6 jerseys in total. Too little. So we delimit the analysis to include only blue, red and white.

COLOR	CLUBS	AVERAGE SCORE
Blue	10	135
Red	18	96
White	17	70

Blue is by far the most popular color while white is by far the least popular. The results would not change dramatically even if best and worst performers were stripped out or if other modifications were made. Certain difficulties do apply to this kind of exercise since Basel, Barcelona and others may count both as red and as blue. At a global level among the general public blue followed by red and green are the most popular colors. This preference seems to be confirmed by this survey.



*Qatar  
Foundation*

# Fan Quotes

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→ “I look for jerseys that are sufficiently different from previous years as to merit purchase. Too many teams slightly modify the styles from the previous jersey and rely on 'new kit!' publicity to sell.”

→ “I tried to look somewhat at aesthetics and not what team it was! But mostly, I tried to find the jerseys that minimized the logo as much as possible.”

→ “I like the jerseys with collars, no huge sponsor name inside a color block.”

→ “None were really 'beautiful' but the graphics were more effective...so I voted based on what I thought I might wear.”

→ “Corporate logos are not chic!”

→ “I hate the striped ones.”

→ “I based my choices on color and graphics and visual boldness; not on teams.”

→ “The jersey of Paris SG is simplistic and stylish. Great color match and design. Fully lives up to Paris as the fashion capital of the world.”

→ “I hate Man United but even so I may still like their jersey. It is slightly different with the chequered pattern with different shades of red. Great jersey.”

→ “Liverpool. Simplicity. But still with details of the club's history.”

→ “Manchester City because it is simplistic and with a contrasting collar. This is a jersey which is equally well-suited to wear on pitch as well as in the pub. Simplicity often works best.”

→ “My preference is based on a mix of favorite club and aesthetics. Next my choice is primarily influenced by the color combination. I surely prefer the jerseys with a mix of red and blue as for instance PSG and Barcelona.”

→ “Bold move to break with the traditional AC Milan shirt design by introducing the white collar!”

# Design



The design of a traditional dress shirt would involve decisions about buttons, collar, pattern, neckline, cuffs etc. In the case of a football shirt many of these elements are stripped out or reduced to insignificance. The most important design expression left is the neckline. It typically takes the shape of a crew neck, a v neck, or a high collar. Many kids

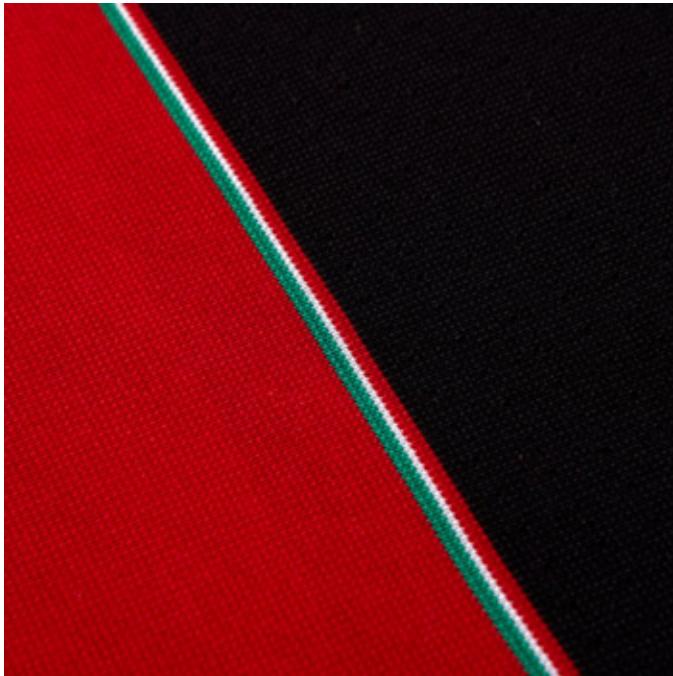


consider the high collar too stiff. Many adults consider the crew neck too casual and too t-shirt like. Often the neckline changes from one season to the next. This is one of the few elements where the designers can make a real change to the look of the shirt.



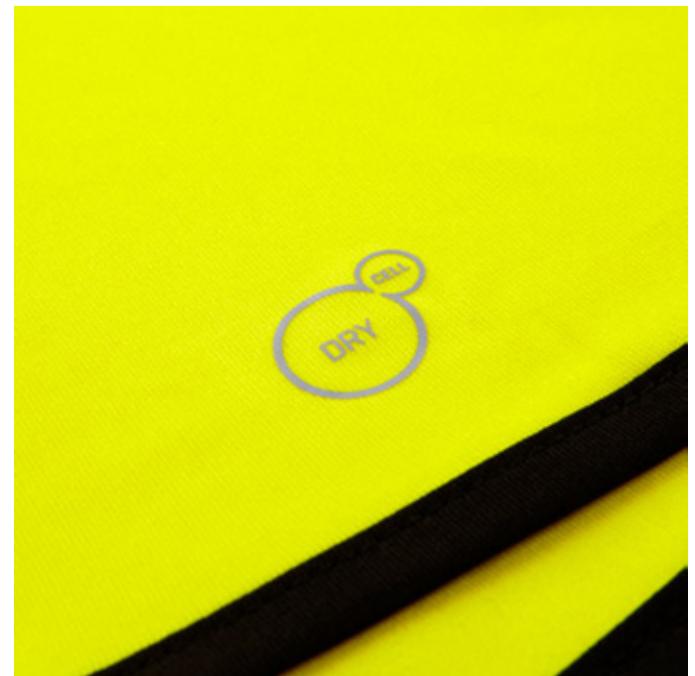
# Garment

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In all tailoring the garment is of primary importance. The garment determines the feel of the piece. The pattern chosen is important for the visual expression. In the case of football shirts most are made of 100% polyester or a mix of polyester with elastane or cotton. Often the pattern is bland and plain without any distinguishing features. In other cases an effort

is made to work with pattern and different colors in the fabric or even using different weaving techniques. Transfers and embroidery are added to the naked garment. Credentials of club, apparel brand, sponsor etc. are added to create the finalized product and bring it alive.



# Brand Connect



AC  
Milan

AC Milan was founded in 1899. The club is among the most popular and most well-known soccer teams in the world. The club's most recent brand slogan "il club piu titolato al mondo" 'the most winning club internationally in the world', says it all. The AC Milan brand is about winning, about innovation, and about conquering the world. This always requires top-notch players. The main rivalries are with Juventus and city neighbors Inter Milan. The nickname of AC Milan is 'i rossoneri' (the red blacks) or 'il diavolo' (the devil). Thus the red/black colors and the little devil are usually present in AC Milan apparel and merchandise. The strong link to the city of Milan is found in the white-red colors which are the colors of the city's heraldry. AC Milan will surely be at the fore of developments in Italy over the years to come but whether it will be able to keep up with major clubs in other top European leagues is somewhat more questionable. The bar for excellence and achievement has been raised.



Arsenal  
FC

Arsenal FC was founded in 1886 in south London. It has since moved up north in the British capital and is now part of the North London Derby versus main rivals Tottenham Hotspur. Long gone are the days when the fans of the opposing side would be chanting 'boring, boring Arsenal'. After manager Arsene Wenger took over during the 1990s the team has been playing a distinctive Arsenal style football with lots of possession, high pace, and at a high technical level. While Arsenal has been growing its fan base domestically and internationally it has never reached the heights of Manchester United or Liverpool FC. The title flow has stopped and the trophy cabinet is in ebb mode. For any sports brand to be successful winning is a must. For a top team winning titles is obligatory in order to retain position. While Arsenal does very well when it comes to managing finances and producing revenue, it is the top 10 club in the world with the weakest winning record over the past 10 years. Can the trend be reversed? If not, the Arsenal brand is up for some kind of revision.



## CA Boca Juniors

CA Boca Juniors was founded in 1905. The club is from the Argentinian city of Buenos Aires and the neighborhood of La Boca. Blue and yellow are quite distinctive colors and according to the legend they were chosen with reference to the Swedish flag on a ship passing by. Boca thus benefits from a strong visual brand appearance. It is one of the few football clubs from outside Europe which has certain brand recognition across the world. Part of the explanation for this is the much revered super-clasico match played against city archrivals River Plate. To many observers this derby counts as the fiercest rivalry in the world. Another reason is the fact that Boca is the second-most winning club in international competitions in the world. Furthermore Diego Maradona got his break-through at Boca. Boca is by far the most popular club in Argentina and continues to have a strong winning record. The great challenge for the brand at a global level is that Argentinian football and Copa Libertadores go somewhat under the radar. With the continued strengthening and increased popularity of the UEFA Champions League this challenge seems even harder to overcome for the years to come.



## Borussia Dortmund

Borussia Dortmund was founded in 1909. The club comes from the city of Dortmund in the Ruhr Gebiet in Germany. The club colors are yellow and black. Actually the color of yellow is the most disliked color among people globally according to a survey by Toronto color week. Probably therefore yellow is not used very frequently with soccer kits and for those exact reasons the black-yellows "Die SchwarzGelben" use the club colors with particular pride and pertinence. The visual brand Dortmund is very distinctive due to the powerful color scheme. That much is for sure. When football took off as a global phenomenon and the increased commercialization turned sports into part of the entertainment industry during the 1990s Dortmund was right there. Thus the club managed to establish itself as the second pole in German football and as first challenger to FC Bayern for the throne. Unfortunately things turned sour during the noughties and Dortmund disappeared from the grand stage. After crisis comes re-birth and Dortmund is now riding high again with a young and talented team. Dortmund should be set to capitalize on the huge fan base in Germany and if the Bundesliga gains in popularity internationally Dortmund might also start to gain supporters outside of the German heartland.



## Celtic FC

The Scottish giant was founded in Glasgow as early as in 1888. Together with eternal rivals Glasgow Rangers, Celtic is called Old Firm. The name Celtic was chosen to reflect the common Scottish, Irish heritage. Usually vertical stripes are for football shirts while horizontal stripes are for rugby shirts. Furthermore green is not used very frequently. Thus the white and green striped Celtic jersey is very distinctive. Celtic enjoys certain popularity in Ireland, US and Australia but is otherwise followed primarily in Scotland. Celtic embodies all the components needed for a strong brand. The major problem is simply the location in Scotland or rather the Scottish league. This makes it hard to attract top talent and it brings limited exposure internationally. Celtic will remain a well-recognized brand but it will be hard to add brand value given the current structure of European football. The brand is static but the content is very well defined. The future looks green/white.



## Chelsea FC

Chelsea FC was founded in 1905. The club's nickname is 'the Blues'. The home uniform consists of a blue jersey, blue shorts and white socks. Chelsea FC was for most of its history a rather mediocre football team from London's West End. Dramatic change was to come Chelsea's way though when Russian Roman Abramovich bought the club in 2003. Money can buy success in sports and in the case of Chelsea FC it has. However, money has only been the entrance ticket to the first tier in the world of football. From there on only clever management and consistent performances can make you take the final step to success. The allure of the Premier League, high quality players, and the winning of trophies has expanded the reach of the Chelsea FC fanbase considerably. Chelsea is now second horse in England after Man United, however they will have to watch their back since other suitors are not far behind. The question everybody asks when trying to assess the Chelsea brand is: What is the brand value of the club once the current owner is gone? Has a building been erected which will stand once the foundation gets removed or will it fold? The Chelsea brand is not as well-defined or as consistent as many of the other clubs we have covered.





## FC Barcelona

FC Barcelona was founded in 1899. The slogan of FC Barcelona is 'mes que un club' meaning 'more than a club' which is probably what it is. The club of FC Barcelona is a phenomenon in society and with an important role to play in politics relating to Catalonia as well. But in this context it is exclusively the football dimension we will focus on. The colors are important to Barca: blau/grana + frequent use of red/yellow, the colors of the Catalan flag, give it a distinct brand identity. Barcelona is the club of the hour. The success on and off the pitch has been tremendous over the past 7 years. FC Barcelona has established itself alongside Real Madrid and Manchester United as the triumvirate ruling the world of international football. No matter which dimension one focuses on, FC Barcelona is top or near top of the league. Cruyff and Guardiola. Ronaldinho and Messi. The club is defined by excellence on the bench and on the field. If Brazil has the ambition to play the 'jogo bonito' and to win – FC Barcelona strives for the same but it has to be carried out in a specific way: The Barca way. And the 'Barca way' is in every conceivable way, fashionable right now.



## FC Bayern München

FC Bayern München was founded in 1904. For most people further comments are unnecessary the name says it all. FC Bayern is by far the most winning club in German football and among the most successful on the European stage. Red and white are the official club colors and the colors of the uniform and logo. The club is financially sound and with a strong management. FC Bayern attracts the best of the best from the German Bundesliga and brings to fore a certain type of FührungsSpieler giving the club leadership on the field. Foreign players have never been more than role players and the club management is all recruited from within. FC Bayern is set to continue its glorious past over the years to come. The brand is even set to increase value and exposure – new players, new coach, stronger league, continued participation in Europe and titles. FC Bayern looks good. A strong Bavarian foundation with more international flair is a strong cocktail.



## Juventus

Juventus was founded in 1897. In Italian the club is often referred to as 'Bianco-Neri' or 'La Vecchia Signora'. The club is the dominating force in Italian football. No other club rivals la Juve for first spot. The zebra is the main reference for the white black striped jerseys. The core values of the club according to the consultancy InterBrand are: excellence, legacy, and passion. The new visual brand identity tries to give the club a more contemporary style while preserving the strong link to the past and to the city of Turin. Juventus has been down for a couple of years but is now regaining the position as first in class in Italy. The interesting thing to follow is how La Juve will fare internationally. In this context Juventus trails AC Milan by far and is also far less well-known and far less popular across the world than the major English and Spanish clubs. Can Juventus establish itself as a frontrunner also in international football? Or will it remain a laggard when it comes to taking the brand global? Only time can tell...



## Liverpool FC

Liverpool FC was founded in 1895. The Liverpool FC brand is probably the football brand in the world relying the most on its legacy as opposed to the current results. The club is also relying heavily on strong symbolism from iconic events or structures to underline the visual brand identity. Hillsborough, LiverBird, Anfield Road, The Kop, You'll Never Walk Alone. No other club has such an array of identity creating symbols to build into the brand. The core values of Liverpool FC are as much about winning as they are about sacrifice, loyalty, commitment, and total dedication. Liverpool has not forgotten entirely how to win trophies but performance has become increasingly inconsistent. The club is immensely popular in the UK and internationally but it is probably relying more on an older fanbase than many other clubs. For Liverpool to appeal to the younger generation they need world class players and consistent performances such as regular participation in the UEFA Champions League. The Reds are trailing top teams at home and abroad significantly when it comes to financial performance. Much work is needed on and off the field if the Liverpool brand is to raise the star and value significantly over the years to come.



## Manchester City

The football club of Manchester City was founded in 1880. It is impossible to look at Man City without a 'before' and 'after' the arrival of the sheikhs of Abu Dhabi. Until Sheikh Mansour bin Zayed Al Nahyan and the Abu Dhabi United Group arrived in Manchester the club lived a quiet existence sitting at the middle of the table in the English Premier League. But with the millions flowing in from the Gulf and with the big player signings it suddenly moved up the ranks and started to challenge for domestic titles. Will Man City be able to grow its fanbase outside the city of Manchester? Many fans may choose to support more than one team picking one team in each major European league. The problem is that city rivals of Man United were there first. And other English clubs like Liverpool, Arsenal, and Chelsea also have a wide following internationally already. Trophies and top players can do a lot to help bring the fans in. So it is all up for grabs for the Citizens but competition is fierce. The Man City brand is an open book yet to be written.



## Manchester United

Manchester United was founded in 1887. For many years the club was one among many English clubs of certain importance. However, since the early 1990s the club has turned from being average into being THE club in England and among the top 3 globally. The club has been the dominant force in the English Premier League since its inception in 1992. Winning is very much in the DNA of the modern Man United. The winning attitude and the countless trophies landed have defined the club during the last 2 decades. Good players have worn the Man United uniform but more than anything else Man United is characterized by the team spirit which sets the team and the club above any individual player. The name of Sir Alex Ferguson has to be mentioned as well. No further comments necessary. The club's nickname is the Red Devils. The Red Devil is often used in conjunction with club merchandise and club uniforms. Red is the Man United color per excellence black and white often follow. An estimated 600 million fans globally tell the story of a truly global phenomenon. Man United is Forbes' most valuable sports team in the world. That tells much of the story when it comes to assessing the allure and staying power of the Man United brand.





## SSC Napoli

SSC Napoli was founded in 1926. The club comes from the city of Naples in Italy. Napoli became only the second team south of Rome to win an Italian championship. This huge triumph was much the work of Argentinian legend Diego Maradona but nobody does it alone in team sports. Diego had some very skilled lieutenants by his side. Before this Belle Époque of Maradona, and after, Napoli has had a rather quiet existence winning few or no titles and without making headlines in the international press. Napoli is the fourth most supported club in Italy but most fans stem from the region of Napoli, Campania. The core values of the Napoli football brand are opposition, loyalty, passion, and never give up. The main rivalry is with Juventus, AS Roma, and the Milan clubs emphasizing the anti-establishment and opposing power symbolized by the club. Napoli is back in Italian football and by now participating regularly in Europe. This bodes well for the future of 'Gli Azzurri' from the azure blue Gulf of Naples, though competition remains stiff.



## Paris Saint-Germain

PSG is the main football club in Paris. While the winning record is reasonable in a French context the club is not associated with a legacy built upon titles. The club is relatively young dating back only to 1970 thus history is not much of a factor either. The main component of the PSG brand is related to the city of Paris. Paris, being one of the world's great cities, evokes emotion and recognition. In France PSG symbolizes the establishment and the elite in Paris versus the regions and in particular the south symbolized by Olympique Marseille. The colors of Paris SG are blue, red, and white. The same colors as the French flag: Le Tricolore. Lately a Qatari investment group has taken over the club and invested heavily in top players with the result that the brand is under change. Paris SG, with the links to the Paris fashion industry, the luxury and celebrity scene in Paris, will surely grow as a brand across all dimensions. PSG is an emerging player to watch.



## Real Madrid

Real Madrid was founded in 1902. Today the club is well-known as a brand well beyond those interested in the sport itself. The brand is limited and expansive at the same time: Limited in the direct access to the club and players. Expansive in the reach through media and by modern means of communication. The Real Madrid brand is all about winning but winning the right way. The right way is a combination of fairness, respect for opponent and officials and by playing beautiful football. In order to play the game at the highest level Real Madrid needs to be able to attract the greatest players and the greatest performers out there. Nobody says no when Real Madrid comes knocking at the door. The challenge for Real Madrid is that the club has grown too big domestically which poses a problem for the Spanish league as well as for Real Madrid. A European super league among the top teams is on the table. Real Madrid is top of the league in the world of football no matter which dimension is taken into consideration: revenues, fanbase, squad value, brand value, jersey sales, home attendance, winning record etc. Nothing indicates that this is to change for the foreseeable future.



## FC St. Pauli

FC St. Pauli is from the city of Hamburg and the neighborhood by the harbor of the same name. The club was founded in 1910. The club is inherently linked to the district where it is originating. The club brand is not related to winning titles contrary to many other strong sports brands. At the core of the FC St. Pauli brand is the "kult" status the club has achieved, in particular in Germany. The values at the core of the club relate to punk, leftwing social movements, activism, and tolerance for sub-cultures and minorities. These values and the alternative punk culture surrounding the club appeal to many sports and non-sports fans alike. This allows a club with very modest success on the pitch to be a brand to be reckoned with in the world of football. The club logo is red and white the same colors as in the coat of arms of the city of Hamburg. The color of the home jersey is brown which is rather unusual in the world of football. But when it comes to St. Pauli it seems very adequate to emphasize the distinctiveness and alternative core values which gives it its unique brand identity.

# Commercial Revenues Index

Deloitte looks at 3 revenue streams for football clubs when they compile the annual ranking of the Football Money League: TV, Stadium, and Commercial. Commercial revenues are defined as sponsorships, licensing deals, and merchandise sales. Let's see how commercial revenues and jersey sales relate.

Most of the clubs which have been shortlisted for the jersey of the year award are also present on the list over the highest grossing clubs for commercial revenues. The rankings are strikingly similar though a few notable differences do stand out. Why would we expect the two lists to correspond? Well, the commercial revenues a club can command reflect to a large extent its popularity and the size of its fanbase. Same thing with jersey sales. The more fans the more jerseys sold. Popularity in sports is very much an effect of results and performance on field. Therefore success ought to spill over into commercial revenues and specifically into jersey sales. The 13 jerseys shortlisted for the jersey of the year 2012 award ranked from 1 to 13 according to sales figures from mmsports.com

CLUB	RANK
Real Madrid	1
FC Barcelona	2
Manchester United	3
Liverpool FC	4
Chelsea FC	5
Arsenal FC	6
FC Bayern	7
Borussia Dortmund	8
AC Milan	9
Juventus	10
Manchester City	11
Napoli	12
Paris SG	13

Let's try to pause there for a minute and look at the commercial revenues of the major European clubs for the season 11/12 from the Deloitte Money League report. No data is available for Paris SG.

CLUB	COMMERCIAL REVENUE M. € EURO
FC Bayern	201.6
Real Madrid	187.2
FC Barcelona	186.9
Manchester United	145.4
Manchester City	138.5
Liverpool	99.1
Dortmund	97.3
AC Milan	96.8
Schalke 04	93.4
Chelsea	87.1
Juventus	73.0
Arsenal	64.9
HSV	58.1
Tottenham	51.3
Inter	50.3
Marseille	47.0
Paris SG*	47.0
Lyon	42.6
Napoli	38.0
AS Roma	36.8
Newcastle	17.1

\*In the case of Paris SG the number is based on our estimate.

The most notable difference between the two lists is the position of English versus German clubs. The English clubs tend to rank higher when it comes to jersey sales while German clubs tend to rank higher when it comes to commercial revenues. Since the sales figures come from a Scandinavian based retailer where English football is more popular than German this may be part of the explanation. Most likely the result would be the same though if figures were aggregated at a global level leaving out the figures

from the home country. German football is extremely popular in Germany but not so much abroad. English football is extremely popular in England but the Premier League is also the most widely followed league internationally. Furthermore the German economy is the biggest in Europe and since most sponsorships are national or even local it means that German clubs usually generate far higher revenues from sponsorship deals than those in other countries. To take one example Schalke 04 probably has few supporters outside of Gelsenkirchen. Gelsenkirchen itself is a rather small city. The club has never won a championship in the Bundesliga and does not play regularly in the UEFA Champions League. The club has no international star players. Thus jersey sales are very insignificant outside of the home town area. Compared to Schalke there is a club like Arsenal which has been a dominating force in English football over the course of the past 2 decades. Arsenal is a club with a large following at home and abroad but even so it only manages to net around two thirds of the commercial revenues of Schalke 04.

The trick now is to create an index combining the commercial revenues of a club with its jersey sales to see if that can provide any insights. FC Bayern has the highest commercial of all thus FCB has been set to index 100.

Paris SG and Man City end up at the bottom of the list partly due to a weak data material. A more interesting case is AC Milan. Commercial revenues often depend on longer term contracts while jersey sales are highly dependent on the current crop of players, the design of the jersey, and on field success. Thus the jersey sales parameter is a more sensitive real-time barometer for the state of a club than commercial revenues. Thus with the wholesale sell-off of high-quality players over the summer of 2012 and with the poor results at the start of the season 12/13 jersey sales have been hurt more than commercial revenues. Which date back to the 2011/12 season in any case.

In the case of Chelsea FC it seems like there is a business opportunity when it comes to growing commercial revenues since the club only makes it to 10th spot on the Deloitte list. Even during a year with Champions League success. But maybe the commercial revenues will indeed grow over the years to come as a result of the victory in the UCL. To reiterate: Many sponsorship deals are long-term contracts making sporting success/failure slower to materialize commercially.

That a smaller club like Napoli ends up near the bottom at both raw lists is no surprise. Without regular participation in the UCL and without global brand recognition a club will suffer both when it comes to sponsorship deals and international jersey sales. Napoli sells around 10% (44,000) compared to 400,000) of the jerseys of AC Milan as well as Juventus globally. Commercial revenues are 52% of those of Juventus and 39% of those of AC Milan. In our index Napoli manages to close the gap maybe as a result of Macron having a more limited distribution network than adidas & Nike.

Otherwise the Commercial Revenues Index follows a familiar pattern with the two Spanish giants and the top teams from the Premier League at the top.

CLUB	INDEX
Real Madrid	841
Liverpool	607
FC Barcelona	590
Chelsea	540
Manchester United	464
Arsenal	376
Dortmund	130
AC Milan	127
Juventus	123
Napoli	108
FC Bayern	100
Paris SG	44
Manchester City	34

# Brand Value Index

Forbes' list of the most valuable soccer teams indicates the worth of a given soccer team at a given point in time. The most current edition dates back to 2012. The teams selected for the list are the 20 clubs from the Deloitte Money League 2012. The Money League looks at current revenues, but not at profits nor at equity or future income. The Forbes ranking is similar but tries to give a more holistic view of the finances and thus the worth of a club. Though the findings are rather similar; the same clubs dominate both lists.

Forbes Most Valuable Soccer Teams 2012:

CLUB	CURRENT VALUE IN M. USD\$
Manchester United	2235
Real Madrid	1877
FC Barcelona	1307
Arsenal	1292
FC Bayern	1235
AC Milan	989
Chelsea	761
Liverpool	619
Juventus	591
Schalke 04	587
Tottenham	564
Inter	490
Manchester City	443
Dortmund	394
Lyon	385
Hamburger SV	355
AS Roma	354
Marseille	349
Valencia	288
Napoli	283
Paris SG	350

A lot of people have questioned that Man United is above Barca and Real Madrid on the list. However, Forbes has its reasons for that selection. In any case all 3 teams would make the top 3 no matter how the list is constructed.

Manchester City and Paris SG may rise on the Forbes list over the years to come due to their strong financial backing. Also on the rise are Juventus and Dortmund due to their improved results on the field. Otherwise it is hard to see any major changes to the configuration at the top of the list.

When it comes to the comparison of the list of brand value and the list of soccer jersey sales the two lists resemble one another even more than when it comes to the comparison of commercial revenues and jersey sales. The bestselling jerseys come from the most valuable soccer teams. Not surprisingly maybe since value is dependent on winning trophies, having talented players, and nurturing a big fanbase. Jersey sales depend pretty much upon the same parameters.

Taking the Forbes brand index as a point of departure we have tried to create an index where brand value to jersey sales is indexed. Since Man United has the highest value in the Forbes ranking we have used Man United as the benchmark. To explain how the index works we can see that Liverpool FC has a score well above the 100 mark which means that the club sells a lot of jerseys compared to the club's brand value. The opposite is the case for AC Milan and others below the 100 mark. Paris SG and Man City may be partly excused due to limited data on those two teams.

The value of the index may be to give us an indication as to which teams are best suited to increase their value through international expansion. Inversely which jerseys have the greatest appeal, neutralizing the effect of financial means at the disposal of the club.

CLUB	BRAND VALUE INDEX
Liverpool	322
Barca	280
Real Madrid	278
Chelsea	205
Dortmund	106
Man United	100
Arsenal	63
FC Bayern	54
Juventus	50
Napoli	48
AC Milan	41
Man City	35
Paris SG	19

Most surprisingly maybe is the position of Dortmund since it is not usually counted among the top teams of European football. But Dortmund has had a run-away season due to their fantastic play in the Champions League and therefore they have sold quite well compared to their relatively low brand value. This is where the impact of the sports kicks in. Things can turn quite quickly depending on the results of a team. Chelsea's Champions League win may have helped them secure 4th spot, also an effect of on field success. AC Milan seems to have been hit inversely by the same having lost luster with the sporting Gods.

# Home Jersey Strength

In order to keep things simple we have picked the home jerseys as the nominees for the award. However, all teams have at least two jerseys for each season and many have even three. One way to try to determine the attractiveness of the home jersey is by looking at how popular it is compared to alternate versions. A fan may buy the Real Madrid jersey because he supports Real Madrid. But if the home jersey is not deemed attractive he may opt for the away or the third jersey.

Ranking by percentage of home jerseys sold:

RANK	CLUB	HOME	OTHER
1	Paris SG	90	10
2	Manchester City	90	10
3	Borussia Dortmund	84	16
4	Liverpool FC	71	29
5	Juventus	66	34
6	Chelsea FC	66	34
7	Arsenal FC	66	34
8	Manchester United	64	36
9	Real Madrid	63	37
10	Napoli	60	40
11	FC Barcelona	60	40
12	AC Milan	55	45
13	FC Bayern	43	57

A number of factors determine which version of the jersey the fan prefers. The manufacturers may release many different versions of the jersey like home, away, third, European style, short sleeve, long sleeve, women's, authentic, replica, stadium, fan etc. Most fans buy just one jersey per season. So therefore the purchasing decision is not an "and" but rather an "either/or". Statistically the home jersey benefits from the fact that some versions of a jersey like women's, long-sleeve, authentic etc. are often only available in the home version.

There are strong arguments for choosing the home jersey for the 4 clubs at the top of the list. Many fans would buy their

first PSG jersey since the club has never attracted much attention until the season 12/13. A natural choice is then the home jersey. The Man City away jersey 12/13 was brown and probably by most considered plain ugly. Dortmund has just switched from Kappa to Puma so everyone would have to buy their first Dortmund jersey from Puma. Besides that the yellow color is somewhat stronger linked to the club than is the case with other clubs. Liverpool FC would start out with their first year as a Warrior team. A new athletic apparel sponsor. A new jersey. Red is the color for the Reds and their first jersey from Warrior has indeed been well-received among the fans. The mid-section from 5-12 consist of clubs which are already involved in ongoing contracts and where the novelty factor is less predominant. That FC Bayern ends up at the bottom of the list is no surprise. The FC Bayern home jersey 12/13 is a carry-over from the 11/12 season. If a home jersey does not change much from season to season it may lead some fans to buy an alternate jersey in the case that they already have a home jersey in the wardrobe.

One should not underestimate the impact of fashion dynamics and trends when it comes to soccer jerseys.





Pret a Porter  
Finals 1 - 10



# 1/10

# Real Madrid



- Make: adidas
- Season: 12 / 13
- Colors: White / Navy
- Kit: Home

The Fans	Rank: 5
The Fashion	Rank: 1
The Finance	Rank: 2

## The Final Cut

Real Madrid ends up with a final average of 2.7. This makes the Real Madrid home jersey 12/13 THE Soccer Jersey of the Year 2012. Congratulations to Los Blancos!

The fans may not all have been overly excited about the white jersey. However, the designers loved the stylish and classy jersey. Real Madrid has strong numbers to back up the opinion of devoted fans and the fashion designers. This completes the image of a solid overall performance and as best in the league.

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Total Average Score: 2.7

Final Rank: 1

## Fan Survey

Real Madrid managed to sneak into the list over fan favorites as number 5. Probably more due to the club and the players than the jersey itself. White as such is rarely very popular. The exceptions to this rule stem primarily from specific associations to a team or an event. In the survey we ran a split test categorizing the voters in two halves: soccer fans / non soccer fans. And predictably Real Madrid did not score well among the non-soccer fans. But due to the overall popularity of the club at a global level it would still manage to end up with the fifth best score in the fan vote.

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**Percentage of Fan Votes: 4.3%**

**Rank: 5**

## The Fashion

The fashion designers whom we spoke to praised the material which is soft and pleasant to touch. One designer said he did not like the silver lines in the fabric but did give adidas credit for trying to light up the plain white. The collar did attract a bit of attention as well. The v-neck with one layer over another did not receive much applause. Others were more positive with regard to the design. A royal club like Real Madrid with a long tradition ought to have a stylish classical jersey. In this regard the 12/13 edition delivers. The contrasting colors do the job in making the jersey more vivid. Overall the 12/13 jersey has a nice touch of elegance and timeless class. To sum up: Material great. Design decent. Brand connect quite successful.

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**Average Design Score: 8.5/10**

**Rank: 1**

## The Finance

According to Deloitte Real Madrid is the club in the world with the highest annual turnover and the second highest commercial revenues. The club is very solid financially and is also the bestselling club with adidas. RM is possibly the club in the world selling the most soccer jerseys rivaled only by eternal rivals Barca and Man United. When it comes to generating commercial revenues RM benefits from star players, legacy, a global fan base, and participation in the major club tournament. The jersey sales benefit from the same factors + the power of the brand adidas and its global distribution network. In our index RM came out on top with the best ratio of commercial revenues to jersey sales.

**Commercial Index Score: 841**

**Rank: 1**

According to Forbes Real Madrid is the second most valuable soccer club in the world second only to Man United. A top 3 position for 'Los Merengues' is probably in the cards also for the years to come. The Real Madrid brand is indeed strong across all dimensions. Real Madrid makes it as number 3 on the list narrowly beaten by FC Barcelona and behind Liverpool. A strong football brand should translate into strong jerseys sales. Real Madrid delivers on that proposition.

**Brand Index Score: 278**

**Rank: 3**

Let's look at the strength of the home jersey compared to alternate jerseys and goal keeper kits. In the case of RM with 2 alternate jerseys and 2 goalie uniforms the home kit gets a run for its money. The Real Madrid home jersey with the traditional white color does have its allure and therefore delivers a reasonably strong showing compared to the alternate kits. Furthermore it benefits from the fact that only the home kit is available in a long sleeve version.

**Home Jersey Strength: 63%**

**Rank: 8**

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**Total Financial Average: 4.3**

**Rank: 2**

# 2/10

# FC Barcelona



- Make: Nike
- Season: 12 / 13
- Colors: Blue / Red
- Kit: Home

Fan Survey	Rank: 1
The Fashion	Rank: 6
The Finance	Rank: 5

## The Final Cut

We can conclude that FC Barcelona ends at or near the top on all dimensions with a final average rank of 4. This makes FC Barcelona the number 2 in the Soccer Jersey of the Year 2012 award. Congratulations with a great jersey and a strong performance. Most fans loved the jersey. The designers were reasonably favorable while the numbers do add up for Barcelona. A slightly more fashionable jersey and Barca may take top spot next time around!

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Total Average Score: 4

Final Rank: 2

## Fan Survey

The FC Barcelona home jersey for the season 12/13 was voted in as the number 1 jersey of the year 2012 by the fans. No doubt that the jersey benefits from the popularity of the club and the appeal of its players. The colors scheme of red and blue is also advantageous since both colors have positive appeal. That said the Barcelona jersey also received many second, third or fourth votes indicating that not only the die-hard Barca fans found the jersey appealing. The bold deep red & blue colors with the yellow accent have struck a chord with many.

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**Percentage of Fan Votes: 8%**

**Rank: 1**

## The Fashion

The fashion designers were generally positive about the Barca jersey but with diverging opinions regarding the details. One designer said that the pattern with the fading dots did not work with him. He was also critical of the material considering it to be rather stiff and not very comfortable. Another designer however praised the fabric for being light and airy. Most designers we talked to praised the details like yellow on the inside of the trim of the sleeve, Catalan flag on the backside of the neck etc. which all connect well with the brand. Another point of criticism was the lack of color match between different elements of the jersey: the yellow accent of sponsor logo, embroidery, and inscriptions are all in different shades of yellow.

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**Average Design Score: 7/10**

**Rank: 6**

## The Finance

FC Barcelona sells a lot of jerseys. It is the bestselling club of Nike alongside Man United and probably a top 3 overall globally with Real Madrid and Man United. The split between home, away, and goal keeper jerseys indicated that 60% of the Barcelona jerseys sold were the home jersey. This makes the value proposition of the home jersey relatively strong. FC Barcelona is the club in the world with the 3rd largest commercial revenues according to Deloitte. In our commercial revenues index Barcelona also comes in third. The commercial revenues of a club should reflect its appeal and exposure. Jersey sales should reflect the appeal to fans and the strength of the primary asset of the club: the players. Thus Barcelona seems to be in-sync on this dimension. The brand value of the club is not only its current worth based on revenues. It also looks into the future and looks at the prospects for generating revenues and profits over the years to come. Forbes has FC Barcelona as its number 3 in this category. When we look at the brand value index Barca does one better and ends up as number 2. This could indicate that the club is slightly undervalued. A possible explanation for this is that the players are popular and sell jerseys but they are not entered in the accounts at market value but rather at purchasing price.

**Commercial Index Score: 590**

**Rank: 3**

**Brand Index Score: 280**

**Rank: 2**

**Home Jersey Strength: 60%**

**Rank: 10**

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**Total Financial Average: 5.3**

**Rank: 5**

# 3/10

## Liverpool FC



- Make: Warrior
- Season: 12 / 13
- Colors: Red / Yellow
- Kit: Home

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Fan Survey Rank: 10

The Fashion Rank: 4

The Finance Rank: 1

### The Final Cut

The figures do add up for Liverpool FC with an average rank of 2.3 making it the number 1 performer on the financial dimension. It also did rather well when it comes to fashion with a score in the upper echelon of the table. The major problem for the final result: the fan survey. Apart from the dedicated Liverpool fans not many decided to vote for the Liverpool FC home jersey 12/13. Liverpool takes third spot overall which is a great achievement for the first ever Liverpool jersey from Warrior.

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Total Average Score: 4.3

Final Rank: 3

## Fan Survey

The fans liked the new Liverpool jersey from Warrior but only to a certain extent. Liverpool ended up on the 10th spot in the fan survey. Since most fan votes were based on small icon photos of the jerseys Liverpool probably suffered a bit from having a rather classy but homogenous jersey where details are hard to distinguish at a distance. Liverpool would claim a decent amount of 1st and 2nd votes indicating that the Liverpool supporters and those who might actually own the jersey would back it up. But probably a little bit disappointing for everything Liverpool that it would only make it to 10th spot with an otherwise successful first kit from Warrior.

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**Percentage of Fan Votes: 3%** **Rank: 10**

## The Fashion

The Liverpool jersey was generally well-received among the designers: Good overall look. Great consistency. One block color. Near to color match in the yellow contrasts. Nice collar. Nice little detail with a mesh panel to the side to channel away humidity. Another designer added that the classical style of the jersey, the retro style look + little details were connecting well to the brand. The Liverbird logo and Hillsborough flames would be noted by the true supporters.

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**Average Design Score: 8/10** **Rank: 4**

## The Finance

According to Deloitte Liverpool manages 6th spot when it comes to raking in commercial revenues. Since Liverpool is the second most popular club in the UK but might be lacking somewhat in the new growth markets of Asia, Middle East,

and North America we may assume that most of the income stems from the home market. Big shirt sponsor deal with Standard Chartered. Big kit deal with Warrior. Just to mention two of the commercial revenue streams. A solid showing financially on the commercial revenue index lands Liverpool 2nd spot. FC Bayern is the club in the world with the highest commercial revenues so they have been set to index 100.

**Commercial Index Score: 607** **Rank: 2**

In the Forbes brand value ranking Liverpool FC makes it to 8th spot a respectable showing and in line with its 9th spot in the Deloitte Money League. The problem however is that there is a vast gap between Liverpool FC and the top 5-6 clubs on the list. Brand value is discounted future income in current day dollars. Meaning that compared to the Deloitte Money League which is about actual revenues for any given season the Brand Value Index also uses the crystal ball to glance into the future. In that regard Liverpool suffers from a number of problems: lack of regular participation in the UCL. A limited stadium capacity, and low match day receipts. Lack of starplayers. Fierce competition. But since the fans continue to love Liverpool and since they continue to buy their kits well then we have a very strong showing from Liverpool on this parameter.

**Brand Index Score: 322** **Rank: 1**

Since Liverpool is still very popular in Scandinavia = selling a lot of jerseys. And since the sporting fortunes of the club and thereby financials are somewhat on the downside one would expect a strong financial showing. Scandinavia is the region outside the UK where Warrior sells the most Liverpool kits. In particular in Norway and Denmark Liverpool FC has a very loyal following. Liverpool manages 4th spot when it comes to selling the home jersey over alternate versions of kit. A solid showing since the range of Liverpool kits is deep including goal-keeper jerseys and 2 alternate playing kits.

**Home Jersey Strength: 71%** **Rank: 4**

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**Total Financial Average: 2.3** **Rank: 1**

# 4/10

# Manchester United



- Make: Nike
- Season: 12 / 13
- Colors: Red / Black
- Kit: Home

Fan Survey	Rank: 2
The Fashion	Rank: 5
The Finance	Rank: 7

## The Final Cut

Manchester United manages fourth spot for Soccer Jersey of the Year 2012. In fact Man United may have had the strongest combo of all clubs since their white away jersey has also been very popular. To sum up: A very nice jersey with a revolutionary checkered pattern doing well across all dimensions. This jersey could easily have deserved to win it all had it not been for the fierce competition from the Spanish rivals.

Total Average Score: 4.6

Final Rank: 4

## Fan Survey

The Manchester United home jersey 12/13 has to be considered a success. The fans loved it for the checkered pattern breaking with the last couple of years' rather dull design. The stylish finish and the little details also helped. Therefore it comes as no surprise that Man United was voted in as number 2 after FC Barcelona among the fans. Of course Man United also benefits from having one of the largest international fan bases in the world but also the non-soccer fans ranked the jersey at or near the very top.

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**Percentage of Fan Votes: 5.5%**

**Rank: 2**

## The Fashion

This jersey seems to have hit a homerun. Also the designers liked it. The consistency of the look, the surprising pattern, and the little details making a strong connection to the Man United brand gives it a positive grade. A little devil on the back of the neck. A quote inside the collar. The pattern. All details that connect well with the MU brand. The one thing which was a concern to some is the garment. Not all like the recycled plastic bottle DriFit polyester that Nike uses for its replica shirts. But the design and the strong brand connect lift the jersey towards the top of the list.

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**Average Design Score 7.5/10**

**Rank: 5**

## The Finance

According to Forbes Man United is the most valuable football brand in the world, in fact the strongest brand in all sports. Not to a small extent due to the 600 million strong following worldwide. Therefore Man United has been set as the benchmark on this parameter. MU does reasonably well and manages 6th spot.

**Brand Index Score: 100**

**Rank: 6**

Man United rakes in a lot of money with strong commercial partnerships and strong merchandise sales. The club also sells a lot of jerseys thus it does quite well on this parameter scoring 464 on the index where FC Bayern is set to 100.

**Commercial Index Score: 464**

**Rank: 5**

To produce a successful white jersey and in particular an away or third jersey can be a hard task. Nike has done just that though with the Man United away jersey 12/13 which is stylish but with enough fireworks not to make it look boring. This takes its toll on the numbers of the home jersey. MU only manages 8th spot on this parameter. But for a positive reason: Both home and away jerseys have been a success.

**Home Jersey Strength: 64%**

**Rank: 8**

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**Total Financial Average: 6.3**

**Rank: 7**

# 5/10

## Chelsea FC



- Make: adidas
- Season: 12 / 13
- Colors: Blue / Gold
- Kit: Home

Fan Survey	Rank 6
The Fashion	Rank 8
The Finance	Rank 2

### The Final Cut

Chelsea is quite popular among the fans. The designers consider the jersey to be average but not without its merits. The numbers do add up for Chelsea and Chelsea takes second spot overall on the financial scorecard index. Chelsea is proof that in sports results do matter! The Blues swing.

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Final Average Score: 4.3      Final Rank: 5

## Fan Survey

Generally speaking the color of blue is popular. Gold has turned out to have its advocates. Combined they give the Chelsea home jersey 12/13 a distinctive look. Chelsea was voted in as number 6 on the list by the fans. No doubt that the win in the UEFA Champions League has helped the club to gather steam marking the end of a decade as a top contender. Chelsea may in fact be the club which has seen the sharpest growth curve in number of fans among all major clubs over the past 10 years.

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**Percentage of Fan Votes:** 3.5%

**Rank:** 6

## The Fashion

While the fans were generally receptive to the blue/gold theme not all designers liked this combination. 'The contrast does not work well between a blue background and gold'. The pattern in the fabric which is slightly zigzag shaped was also object for some controversy. Some found it to be ok while others did not like it. The garment got the thumb up though for being soft and flexible. The crew neck is rather anonymous but to some it is too much t-shirt like while to others it is ok with a neckline which is not too noisy. Chelsea ends up in the middle of the pack taking spot number 8. The major novelty for the 12/13 jersey was the gold color. If this feature is not given full credit well then the jersey will indeed find it hard to make it beyond average.

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**Average Design Score:** 6.5/10

**Rank:** 8

## The Finance

Financially Chelsea is still pretty much dependent on a rich owner. Winning the UCL + having some exciting players + growing the fanbase means that Chelsea sells quite a lot of jerseys. This cocktail means that Chelsea does rather well on the financial dimension. On the brand value index Chelsea manages 4th spot. On the commercial revenues index Chelsea goes 4th. And when it comes to percentage of home jerseys sold Chelsea goes 5th. All in all a strong showing by the club from West London. On the financial index Chelsea is a shared second overall.

**Commercial Index Score:** 540

**Rank:** 4

**Brand Index Score:** 205

**Rank:** 4

**Home Jersey Strength:** 66%

**Rank:** 5

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**Total Financial Average:** 4.3

**Rank:** 2

# 6/10

## AC Milan



- Make: adidas
- Season: 12 / 13
- Colors: Red / Black
- Kit: Home

Fan Survey	Rank 3
The Fashion	Rank 2
The Finance	Rank 12

### The Final Cut

AC Milan ends up near the very top of the list when it comes to the direct assessment of the jersey's qualities. However, when involving sales figures and other financial data AC Milan is second from the bottom. This leaves us with the impression that the ACM jersey has the biggest spread in performance among all jerseys on the list. Since all 3 dimensions fans, fashion, finance are weighted equally AC Milan does manage to compensate enough for the poor financial showing on the other 2 dimensions to secure the number 6 spot on the list.

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Final Average Score: 5.7

Final Rank: 6

## Fan Survey

The AC Milan home jersey struck a chord with the fans. The combination of red and black seemed to work wonders compared to those jerseys with red and white stripes which all scored low. The rather striking high collar in pure white gave the jersey a touch of class. AC Milan also benefits from being rather popular across the world and for having a recognizable uniform. Only Barca and Man United performed better than AC Milan making it a very respectable 3rd.

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**Percentage of Fan Votes: 4.6%** **Rank: 3**

## The Fashion

The fashion designers liked the AC Milan home jersey. Nice little detail with a thin green and white line in the garment which combined with the red stripe makes up the Italian flag. Comfortable feel of the garment and nice pattern. Fairly accurate colormatch between the different shades of white, black, and red. A rather simplistic but also elegant high collar gives the jersey a distinctive look. Not too much to complain about. The one area where AC Milan was lacking slightly was with regard to the brand connect. The club's slogan is "il club piu titolato nell mondo". But how do you reinforce this "conquer the world" attitude in a jersey?

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**Average Design Score: 8/10** **Rank: 2**

## The Finance

This is where you start to see how on field performance and quality players in the squad affect performance. AC Milan offloaded a number of their star players before the start of the season. The team got off to a very bad start to the season 12/13. These factors have surely affected jersey sales negatively. Thus while the club has a high brand value, and is quite successful in raking in commercial revenues across the board when couples with slow jersey sales that makes for a rather unsuccessful showing. Since the color scheme of all 3 AC Milan jerseys coming out is fairly static. Red/black home, white away, black third AC Milan does not even benefit from any particular novelty coming from one of the alternate jerseys. Therefore it might surprise that home jersey sales only make up a bit more than 50%. The reason is probably sluggish youth jersey sales after Ibra left and discounted prices on the alternate jerseys.

**Commercial Index Score: 127** **Rank: 8**  
**Brand Index Score: 41** **Rank: 11**  
**Home Jersey Strength: 53%** **Rank: 12**

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**Total Financial Average: 10.3** **Rank: 12**

# 7/10

# Paris Saint-Germain



- Make: Nike
- Season: 12 / 13
- Colors: Navy / Red / White
- Kit: Home

Fan Survey	Rank 6
The Fashion	Rank 2
The Finance	Rank 9

## The Final Cut

The PSG jersey might have deserved more but ends up as a respectable shared 6th on the list losing the tiebreaker (fan votes) to AC Milan. The jersey was popular with the fans as well as with the designers. The PSG jersey benefits from an attractive color scheme and from being a new kit on the block internationally. The financial dimension was difficult to truly evaluate due to the unreliable and incomplete data. However, we would still believe it to be an accurate assessment that the financial dimension is the weakest point for the PSG home jersey 12/13.

Final Average Score: 5.7

Final Rank: 7

## Fan Survey

Paris SG turned out to be a very popular jersey among the fans. The more remarkable it is since the club probably does not have a whole lot of dedicated fans outside of the larger Parisian metro area. But the dark blue color with the flashes of red and white struck a chord with the audience: The neutral observer and the dedicated soccer fan alike. PSG would even command a number of first rank votes from soccer fans testifying to the strength of the jersey. One fan said: "The jersey of Paris SG is simplistic and stylish. Great color match and design. Fully lives up to Paris as the fashion capital of the world." PSG manages to conquer a more than honorable shared 6th spot out of 51. Had the club had a greater fan base internationally most likely the score and the rank would have been even higher. The PSG jersey 12/13 truly delivers in the eye of the fan.

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**Percentage of Fan Votes: 3.4%** **Rank: 6**

## The Fashion

Not surprisingly the fashion designers were quite pleased with the PSG jersey 2012. The fabric is essentially the same as with other Nike jerseys so it got the same evaluation as Barca or Man United. Some liked the lightness and airiness of the fabric others found it to be too rough and not smooth enough on the skin. The weaving itself did not attract a lot of attention "was ok" though Nike has developed a specific pattern which is used across all jerseys to give them a distinctive Nike look. The color scheme with navy and blue, red essentially "les tricolores" known from the French flag have been well incorporated. The crew neck is loved by some loathed by others. What might have been detracting a bit from the overall score was lack of clarity with regard to the brand connect to the club.

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**Average Design Score: 8.5/10** **Rank: 2**

## The Finance

Since the latest figures from Deloitte concern the 11/12 season we do not have actual figures for the commercial revenues of PSG. The club is privately held so the owners do not have to disclose financial information. However, another French club Olympique Marseille would take in 47 million Euro during the season 11/12. To make things easy we have set the revenues of PSG equal to that number.

Next problem arises due to limited sales figures available. The PSG jerseys have been in short supply among most retailers since nobody expected to see Ibra and other stars at the club. In conclusion all there is to be said is that PSG is on the rise and a club to watch for the future but the scores here below have to be looked upon with all kinds of reservation!

**Commercial Index Score: 44** **Rank: 12**

Next problem comes with the estimated brand value of Paris SG. The figure is surely rising fast but it is yet to be assessed by Forbes or others. So again we will have to set the score of some other club as benchmark. Dortmund is valued at 394 \$ millions so we set the value of PSG to 350 \$ millions. PSG ends up last on the Brand Index which is probably undeserved but anyway.

**Brand Index Score: 19** **Rank: 13**

The PSG home jersey is deemed beautiful by most fans and the navy color a strong symbol of the club. Since many fans outside of Paris would be first time buyers of the PSG jersey the obvious choice would be the home kit. The figures are loaded with uncertainty as well since home and away jerseys have been sold out over long stretches so these figures have to be taken with all kinds of reservation.

**Home Jersey Strength: 90%** **Rank: 1**

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**Total Financial Average: 8.7** **Rank: 9**

# 8/10

# Manchester City



- Make: Umbro
- Season: 12 / 13
- Colors: Sky Blue / Black
- Kit: Home

Fan Survey	Rank 6
The Fashion	Rank 8
The Finance	Rank 9

## The Final Cut

Out of 51 nominees Manchester City manages 8th spot on the list for Soccer Jersey of the Year 2012. That is very respectable indeed since Man City does not have the same international fanbase as most of the other top ranked jerseys on the list. The Man City jersey was well received among the fans and got the nod of accept from the designers. That lifted it out from the financial mess which was somewhat softened though through the strong showing on the home jersey strength index. Next season when the Nike effect sets in Man City is set to do even better. It may end up as Rookie of the Year 2013.

---

Final Average Score: 8

Final Rank: 8

## Fan Survey

The fans quite liked the Manchester City home jersey 12/13. Though the true blue Man City fans outside of the city of Manchester might be far and in between the Man City jersey seems to have a certain universal appeal. It is not overloaded with graphic detail. The color scheme is fairly minimalistic black on blue. The high collar does a bit to break the plain blue as a striking visual feature. Sky blue is not widely used which makes it stand out in a crowded forest of jerseys in colorful shades of red, blue, and white.

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**Percentage of Fan Votes: 3.5%**

**Rank: 6**

season's switch from Umbro to Nike will almost inevitable lead to higher sales internationally due to the much wider distribution and sales network of Nike + the novelty effect and the effect of the strong Nike brand. Compared to Chelsea which started out on much the same trajectory as City does now just 10 years earlier and City faces a much tougher competitive environment vying for the fans than what Chelsea did back then. Chelsea managed to secure the position as primary challenger to Man United while the fortunes of the other 2 "big 4" clubs Liverpool and Arsenal were on the down. At the same time the Premier League broadcasting deals expanded to many new countries. Unless City can establish itself as the main contender to Man United in the Premier League and consistently make it to the quarterfinals in the UCL while at the same time attracting top talent it is hard to see how it can grow its fan base and thereby its jersey sales considerably.

## The Fashion

The fashion designers were divided (as usual) when it came to the City jersey. Some considered it to be too plain and too boring. Others thought it was classy, stylish, and retro (in a positive sense). The one thing everyone seemed to agree upon was the great consistency in the jersey and the successful color match of collar, trims, logo, and sponsor. The fact that the body was a cotton polyester mix and the sleeve in an elastic material would also receive a very mixed reception. But atleast the body material received the thumb up. The "new" Man City brand is not very well established in the eye of the public and therefore it was hard to involve the brand connect feature with this jersey.

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**Average Design Score: 6.5/10**

**Rank: 8**

City ends up near the bottom on the commercial revenue and the brand value index while being right at the top when it comes to selling the home jersey versus alternate jerseys. City compares well to PSG in the scores as well as in the limited data material available. The Man City away jersey for the season 12/13 was truly ugly while the UCL jersey was club only. So that might explain the preference for the home jersey.

We want City to be on the list so we bring the scores anyway.

## The Finance

Manchester City still has some way to go when it comes to selling jerseys. Likewise when it comes to generate commercial revenues. The brand value is also somewhat subdued due to the rather uncertain future of the club. Next

**Commercial Index Score: 34**

**Rank: 13**

**Brand Index Score: 35**

**Rank: 12**

**Home Jersey Strength: 90%**

**Rank: 1**

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**Total Financial Average: 9**

**Rank: 9**

# 9/10

# Borussia Dortmund



- Make: Puma
- Season: 12 / 13
- Colors: Yellow / Black
- Kit: Home

Fan Survey	Rank 10
The Fashion	Rank 13
The Finance	Rank 4

## The Final Cut

The design and the color scheme of the Dortmund jersey is something very dear to the passionate Dortmund fans. To the non-Dortmund fans and to the neutral observers not to mention those dealing with fashion as aesthetics the result is about the exact opposite. Therefore Dortmund does not score well with the Fans nor with the Designers. Soccer jerseys are not sold primarily because of the looks. They are sold because of the club, because of the players, because of success on the pitch. Dortmund has had a lot of success on these parameters recently. Therefore the Dortmund jersey did better than expected on the financial dimension even beating behemoths like Manchester United & FC Barcelona.

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Final Average Score: 9

Final Rank: 9

## Fan Survey

Dortmund managed 10th spot on the list over favorite fan jerseys for the season 12/13. The only yellow jersey in the pack and Dortmund would clearly stand out from the competition. Yellow is synonymous with Dortmund and after their breakaway season in the UCL Dortmund would surely be on the lips and cornea of many fans. With that said many might have liked the powerful yellow with the strong black accent in its own right.

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**Percentage of Fan Votes: 3%**

**Rank: 10**

## The Fashion

While the fans were reasonably favorable towards the Dortmund jersey the fashion designers were NOT. The Dortmund jersey got the by far least favorable treatment among the designers interviewed. Ugly yellow color. Terrible neckline. Overloaded with the Puma logos on the sleeves. Disastrous pink color for the sponsor logo etc. The plain garment without much pattern and of dubious quality got the least of the attention and thus passed as acceptable. But the design and the color scheme was frowned upon. If the intention of Puma was to create something which stands out it might have been successful – if it were to create something beautiful definitely not so. Since the visual brand identity of Dortmund is so intimately linked to yellow the jersey cannot be said not to connect well to the Dortmund brand. But this detail would not be enough to console the general attitude towards the jersey.

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**Average Design Score: 3.5/10**

**Rank: 13**

## The Finance

Dortmund managed to secure 3rd spot when it came down to selling home jerseys over alternate jerseys. Quite a strong showing since the away jersey is black which is usually a popular color with the fans. A qualified guess is that Dortmund sells a higher percentage of home jerseys than most other clubs any given season due to the uniqueness of yellow as the primary club color.

Dortmund did quite well on the brand value index since the Forbes valuation is relatively low. Dortmund being a German club and thus being active in the biggest European economy fares a bit worse when it comes to the commercial revenues index. The club sells a lot of jerseys locally and secondarily nationally but not so many internationally. Commercial revenues are primarily derived from a local and national context. Therefore it is not surprising to see Dortmund somewhat down the list on this dimension.

**Commercial Index Score: 130**

**Rank: 7**

**Brand Index Score: 106**

**Rank: 5**

**Home Jersey Strength: 84%**

**Rank: 3**

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**Total Financial Average: 5**

**Rank: 4**

# 10/10

# Arsenal FC



- Make: Nike
- Season: 12 / 13
- Colors: Red / White / Navy
- Kit: Home

Fan Survey	Rank 17(10)
The Fashion	Rank 10
The Finance	Rank 6

## The Final Cut

The final rank for Arsenal FC is that of 10th spot. Poor scores with the Fans and the Fashion establishment and an average score across the financial dimensions makes this position seem very reasonable. The Arsenal home jersey 12/14 is no high-flyer neither is the team. But a glorious history and a loyal fanbase does secure it a place in the top 10.

Final Average Score: 11

Final Rank: 10

## Fan Survey

The fans were not particularly thrilled about the Arsenal jersey. Generally speaking too much white is not an advantage. Red Star Belgrade, Athletic Bilbao, Atletico Madrid performed rather poorly also. For the genuine Arsenal fan the white sleeves are a signature feature of the jersey, but for the neutral observer not necessarily a +. The jersey does not seem very distinctive which could explain why many non-Arsenal fans chose to ignore it. Since Arsenal is currently experiencing a title drought and the club is not really en vogue it may also have influenced negatively.

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**Percentage of Fan Votes:** 2.2%

**Rank:** 17 (10)

## The Fashion

The fashion designers were not particularly thrilled with the jersey. The sleeves would be an area of contention. The Nike garment which is rather stiff and does feel a bit harsh would also be a problem area. The structure was considered rather coherent though. The neckline a bit dull but still uncontroversial. The color scheme with a bland red, white, and a dull navy did not evoke strong emotions either. The typical score being just average or slightly below average.

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**Average Design Score:** 5.5

**Rank:** 10

## The Finance

Arsenal has a very solid balance sheet. The club is among the top 5 on the Deloitte Money League list, as well as on the Forbes brand value list. If we looked at profits it would also be right up there. Though Arsenal may have lost in popularity it is still a popular club in Scandinavia and elsewhere. Thus Arsenal can still sell some jerseys though not even close to what the top performers like Real Madrid or FC Barcelona are capable of. But it does secure Arsenal a reasonable ranking across the financial dimensions. A new home jersey for the season 12/13 and Arsenal shows a solid performance on the home jersey strength dimension.

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**Commercial Index Score:** 376

**Rank:** 6

**Brand Index Score:** 63

**Rank:** 7

**Home Jersey Strength:** 66%

**Rank:** 5

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**Total Financial Average:** 6

**Rank:** 6

# (11)

## SSC Napoli

- Make: Macron
- Season: 12 / 13
- Colors: Azure Blue
- Kit: Home



### Fan Survey

Percentage of Fan Votes: 2.2%

Rank: 18 (11)

### The Fashion

Average Design Score: 5/10

Rank: 12

### The Finance

Commercial Index Score: 108

Rank: 9

Brand Index Score: 48

Rank: 10

Home Jersey Strength: 60%

Rank: 10

Total Financial Average: 10

Rank: 11

### The Final

Final Average Score: 13.7

Final Rank: 11

### Key Findings:

The fashion designers did not like the jersey: Overloaded with sponsor logos and other transfers. Thick and heavy garment. Neckline not very elegant. Strange mesh panels at the side of the jersey. On the plus side the jersey did rather well on the commercial revenue index indicating solid sales compared to a small market and fanbase. Having been out of contention for many years Napoli would be expected to face an uphill battle among the top clubs but SSC does perform reasonably well some may say beyond expectation.

# (12)

# Juventus

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- Make: Nike
- Season: 12 / 13
- Colors: White / Black
- Kit: Home



## Fan Survey

Percentage of Fan Votes: 1.6%

Rank: 28(13)

## The Fashion

Average Design Score: 7/10

Rank: 6 The Juventus home jersey 12/13 got a terrible reception from the fans. The white/black stripes did definitely not please the audience. By far the worst score among the top clubs. The designers were far more welcoming praising the classical style and the timelessness of the design. Financially,

## The Finance

Commercial Index Score: 123

Rank: 9 Juventus ended up 8th a respectable score. On a technical note: Had the "28" been converted into a "13" Juve might

Brand Index Score: 50

Rank: 9 have climbed a few spots on the list. But we leave the fan voice untouched and Juve will have to endure the full weight

Home Jersey Strength: 66%

Rank: 5 of an unpopular jersey in the eyes of the fans. In Italy surely

Total Financial Average: 7.7

Rank: 9 sales of La Juve have gone through the roof over the past

## The Final

Final Average Score: 14

Final Rank: 12

# (13)

## FC Bayern

- Make: adidas
- Season: 11 / 13
- Colors: Red / Gold
- Kit: Home



### Fan Survey

Percentage of Fan Votes: 2.1%

### The Fashion

Average Design Score: 5.5/10

### The Finance

Commercial Index Score: 100

Brand Index Score: 48

Home Jersey Strength: 43%

Total Financial Average: 10.7

### The Final

Final Average Score: 14.3

### Key Findings:

- The FC Bayern home jersey 11/13 suffered from being a carry-over from the season 11/12 and from a rather dubious red/gold theme. The club's international popularity is on the rise but it is nowhere near the popularity at home as reflected in the commercial revenue index. We expect the FC Bayern jersey 13/14 to rise in the ranks since it is a new kit coming out and a return to the traditional red/white color scheme. Add to that a strong performance on the field and the Guardiola effect and FC Bayern will be a player to watch!
- Rank: 19(12)      Rank: 11      Rank: 11      Rank: 8      Rank: 13
- Rank: 11      FC Bayern could well end up as comeback kit of the year
- Rank: 8      2013.
- Rank: 13

Rank: 13

Final Rank: 13





Haute  
Couture



# The Masters of Couture

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Les Couturiers of the football industry are the companies adding a visual ID to the ready to wear football shirts. The name and number sets and the badges being offered to go along with the football shirts are complements rather than standalone products. Therefore the couture houses behind the name kits are less well-known than the athletic apparel manufacturers. The name set is never a standalone product but is always sold in conjunction with a jersey. Nevertheless these Masters of Couture play an increasingly important role when it comes to the finalized product of a soccer jersey. The name and number sets are increasingly integrated with the design of the jersey. The effort going into creating an attractive name and number set is clearly on the rise. The fans seem to want to put their fingerprint on the final product.

Let's try to compare the search volume in google for couture houses, shirt makers, and clubs. This is a bit tricky to determine for certain words like "FC Barcelona" since many refer to the club as "Barcelona" so how do you know when the search term refers to the city and when it refers to the football team? In this case we used the term "FC Barcelona" which gives fewer queries but enough to drive home the point.

## THE COUTURE HOUSES

	SEARCH QUERIES
Deko Graphics	110
Sipesa	480
Stilscreen	320
Sporting ID	1300

## THE SHIRT MAKERS

	SEARCH QUERIES
Nike	37,200,000
adidas	20,400,000
Puma	6,120,000
Umbro	368,000
Macron	110,000
New Balance	2,740,000

## THE CLUBS

	SEARCH QUERIES
Real Madrid	3,350,000
FC Barcelona	2,240,000
Liverpool FC	1,220,000
Manchester U	2,240,000

Though largely invisible to the public eye, the Couturiers producing the official name and number kits actually do a great job. Below we will bring a short introduction to four of the most important couture houses in the industry.

## Deko Graphics

Deko is a German company from the economic super-corridor Frankfurt – Stuttgart. The company is the official and exclusive producer of the adidas names and numbers + the producer and distributor for a number of German Bundesliga clubs. Thus Deko is the distributor of FC Bayern and Borussia Dortmund namesets. The company is the exclusive license holder of Lextra in Europe. The official Bundesliga sleeve badge is produced in this material. The focus is on high product quality and reliability in manufacturing and distribution. The Italian branch of Deko is behind the official Napoli and Lazio names and numbers.



## Sipesa

Sipesa is a graphic design company firmly anchored in the textile industry from the design and fashion hub Barcelona. The company is the sole producer and distributor of the FC Barcelona name and numbers. It also does the name and numbers for other Spanish clubs like Atletico Madrid, Valencia CF and Malaga. The focus is on edgy and elegant design with a firm eye on product quality. Sipesa is the distributor of the namesets for all the major leagues, clubs, and national teams in Spain and Portugal.



## Sporting ID

Sporting ID is the result of one merger and two acquisitions of the two UK based companies Metro Sports and Chris Kay. The hot hand behind this M&A activity is the US based ITW. Sporting ID is the exclusive producer and distributor of Premier League names and numbers. It also holds the license for Real Madrid namesets, and for Nike national teams. The company is capable of both a conservative design strategy as well as a more contemporary edgy experimental style. The slogan of the company pretty much says it all: 'adding visual identity to the game'.



## Stilscreen

Stilscreen is from the Italian fashion capital of Milano. The company is the producer and distributor of AC Milan, Juventus, Inter, AS Roma, Palermo + the Puma national team prints. The focus is on high quality and elegant design and the company works closely with the clubs and apparel producers in order to ensure that the namesets click with the jerseys. In Italy fashion is a way of life. Stilscreen tries to take this vision to the world of football through the creation of eloquent letters and numbers.



# Let's Hear it from the Fans

→ "I really love the great variation of name/number kits in La Liga, Die Bundesliga etc. The EPL is the great exception. The exact same style in a very limited color variety makes for unfortunate jersey color combination. It's boring and worst of all corporate."

→ "Premier League namekits have always been by far the coolest around. It is hard to think of a way to improve them. But maybe a small club logo or the year of the current season could be added to the numbers to give them a unique expression for each club."

→ "Use thicker and more durable materials. Sporting ID's Sencilia

is a good example of a durable material. The name and number is usually the first thing that shows wear on a football jersey. I'd like to see Sencilia type material other than just Premier League print sets too."

→ "Specifically for Sencilia, although the quality is great compared to PU sets, I noticed that the white Senscilia prints lose their lustre quite easily compared to the coloured ones. Perhaps this is due to them being white and felt-like. If there is something that makes them retain their pristine white colour more easily, that would be great."

→ “My advice to a name and number kit manufacturer would be simple: keep the printing and the adhesive thin and clean. Some jerseys are a joy to wear with your favorite player’s details on the back, but occasionally you get a customized jersey where the name or number feels thick and vulnerable, or the adhesive seems loose or the heat transfer weak.”

→ “Keep the fonts on the smaller and thinner scale. It helps to keep the details fitting nicely and it also lowers the chance of damaging the printing when folding or laying down a jersey.”

- “Maybe make the name and number a bit cheaper.”
- “It would be nice if the more popular name and numbers were a little cheaper since you make so many of them.”
- “I hope that most name and number printing can become more accessible and affordable.”
- “KISS - Keep It Simple Stupid!”
- “Make sure that the printing is stylish and simplistic!”

# The Printing At the Back



Transfer prints are basically made of either flock or plastic. These days almost everyone uses plastic apart from the English Premier League. The opinions regarding which is the better variant diverge wildly. No consensus seems to be had, meaning that the two co-exist in harmony. Plastic exists in many different variants and new materials are introduced

frequently. Thus the kind of plastic used is neither uniform nor constant. With a bit of effort and attention to detail even from photos, differences can be spotted. Two-color schemes, distinctive edges, contrasts, 3D effects etc.; the range of visual expressions is plentiful.





# The Appeal of the League

For most football leagues the sleeve badges carrying the league name and sponsor are not very prevalent when it comes to retail sales. The use and distribution of the badges can be restricted as is the case in Italy. The general awareness of or the desire for can be rather low, as is the case with the German Bundesliga and the French Ligue 1. The Spanish La Liga stands out because all replica jerseys from the Spanish League come pre-printed with the LFP sleeve badge. The LFP badge is rather discreet since it is predominantly white with a small palette of colors and the name LFP in capital letters using a bold black font. It does not make so much noise.

The highest profile league in the world is the English Premier League. It is also the league where the sleeve badges have the most dominant position in the design and placement. Furthermore the awareness among the fans for this complement to their jerseys is much higher than is the case with the other leagues. For many fans it is of primordial importance to complete their kit to perfection by adding the badges. 'As seen on TV' is often the motivation behind it.

With that said the badges do not get a good rep with the design community. In most cases they break symmetry, color scheme, coherence etc. of the jersey. Since the badges are applied at high temperature and often need a special positioning in the heat transfer printer they might even damage the fabric of the jersey. To have one uniform set of badges + making sure that the sponsor who has put a lot of money in the sponsorship gets noticed, requires some sort of compromise when it comes to the design stature of the badges.

But let's take a look at the data. How many fans actually choose to add badges to their jerseys? The percentage seems strikingly similar for all English Premier League clubs in the sample.

CLUB	% BADGES
Manchester United	22%
Chelsea FC	22%
Liverpool FC	21%
Arsenal FC	24%
Manchester City	23%

Certain efforts have been made in order to integrate the badges better with the design of the jersey over the past few years. adidas has made room between the stripes or kept the stripes short of the trim at the sleeves. Puma has allowed space below their Puma logos on the sleeve. Nike has tried to make the design and the colors used at the sleeve accommodate a sleeve badge and to fit it into a very specific slot.

Whether this has been successful or not is somewhat more questionable. Most jerseys are still sold without the badges so the shirt maker has to make certain that the design works even without the badges.

For the other leagues the figure for badges added is lower for the reasons mentioned above.

Probably the most desirable badge of all is the UEFA Champions League Starball badge. The reason for this may well be its exclusivity. Only the clubs themselves and the official club stores have access to these badges. They are not sold to regular retailers. Some adidas versions of their UCL jerseys do come with the badge pre-printed. But even these jerseys often have limited reach.

The football industry generates significant money by selling the naming rights to the various football leagues. So probably the badges are here to stay for the better and the worse of it.



The sleeve badges used in the major European leagues differ quite substantially when it comes to the material used. In the case of the English Premier League the choice of material is flock. In the case of the German Bundesliga 3D Lextra is used which is also a felt like material. In Italy the Lega Calcio badge is plain plastic. In Spain they opt for yet another

variant: Embroidery. Only the Spanish league delivers the badges pre-printed on the replica shirts. To apply the badges in the right position can be quite tricky especially on long-sleeve jerseys. And once they are there they stick.



# The Franchise Player

In US sports where a club is a team and where the organization is a franchise individual players come to identify the team. Usually there is one player in every team who gets the maximum size contract and with whose name most jerseys are pre-printed (signature player). In European soccer where the club as an institution with a long legacy is the primary identifier this phenomenon does not exist. However, we will try to use the sales figures to see which players seem to be the dominant figures in their teams.

A franchise player as we define it in this context is a player who sells at least 30% of his team's player jerseys on personalized jerseys. And also holds at least a 20% point margin to the second bestselling player from that team. And finally has been with the club for +1 year. Novelty fades quickly. Players come and go. If you want to take on the predicate as the franchise player you need to show consistency night in and night out. Year after year. And let the numbers back you up.

TOTAL	PERCENTAGE	CLUB
Cristiano Ronaldo	61	Real Madrid
Messi	56	Barca
Schweinsteiger	55	FC Bayern
Kun Aguero	55	Man City
Pirlo	45	Juve
El Shaarawy	38	AC Milan
Gerrard	37	Liverpool FC
Van Persie	35	Man United
Cazorla	35	Arsenal
Del Piero	32	Juve
Suarez	31	Liverpool FC
Silva	28	Man City
Hazard	27	Chelsea
Torres	23	Chelsea
Podolski	20	Arsenal
Gomez	20	FC Bayern
Agger	20	Liverpool FC
Balotelli	19	AC Milan

Kagawa	17	Man United
Casillas	15	Real Madrid
Wilshire	13	Arsenal
Oscar	12	Chelsea
Rooney	12	Man United
Ozil	10	Real Madrid
Iniesta	10	Barca

Had the data been more solid for Paris SG surely Ibrahimovic' would also have been at the top of the list. In the case of Dortmund, Götze and Reus sell about the same so no real franchise player has evolved yet. Both Juve and Liverpool have 2 players who sell +30% player jerseys. Since Del Piero is no longer with Juventus we may count him out. In the case of Liverpool Steven Gerrard is to a large extent the essence of the club. But he is no longer the best player in the team. That is Luis Suarez. So that the two of them split the honors makes sense. At AC Milan El Shaarawy emerged from the rubble after the firesale over the summer of 2012 as THE big revelation. With Balotelli and others at the club and when his novelty has faded we will see if his numbers go down. In Arsenal, Wilshire fits the bill of the franchise player but he is often injured and a player like Cazorla may have more flair. Whether Cazorla will be able to outsell his peers at a significant margin over the coming seasons is yet to be seen?

Applying the 3 criteria mentioned above leaves us with the following list of franchise players:

PLAYER	CLUB
Cristiano Ronaldo	Real Madrid
Lionel Messi	FC Barcelona
Bastian Schweinsteiger	FC Bayern
Sergio Kun Aguero	Manchester City
Andrea Pirlo	Juventus
El Shaarawy	AC Milan

Indeed a very select group of players. For the season 13/14 we would probably expect Zlatan Ibrahimovic', Robin van

Persie and if fit Steven Gerrard to join their ranks. Otherwise a Francesco Totti with AS Roma and a Gareth Bale with Spurs spring to mind as other examples of franchise players. Eden Hazard of Chelsea may also evolve into one. Pirlo, El Shaarawy, and Aguero may see their position threatened if high profile players are landed in their respective clubs.

That Dortmund and Napoli end up at the bottom of the list may have more to do with the limited selection of printing options than with being less desired.

The median seems to lie around 65-70% of jerseys printed. The average may very well lie around that number as well.

#### Percentage of Printed Jerseys:

Below we will show a table displaying the attractiveness of adding a name and number to a jersey versus leaving it blank.

CLUB	% PRINTED JERSEYS
Chelsea	75
Barca	72
Man United	70
Real Madrid	70
Paris SG	70
Juventus	65
Man City	65
FC Bayern	64
AC Milan	56
Liverpool FC	55
Arsenal	51
Napoli	50
Dortmund	50

The results are affected by a number of factors such as price, availability, custom options, design, fit with jersey etc. The table may not factor in all these variables but it probably does tell a couple of things. That Liverpool, Arsenal, and AC Milan (at least during the beginning of the season) do not have the same star quality players as the other clubs. That the Liverpool fans may support the club itself and its' legacy more than they identify with the current crop of players. That the design of the jersey and the connect of the printing may also influence. That the Liverpool jersey 12/13 may actually look better without the white/black Premier League nameset.

# The Devil is in the Detail

Recently the France Football magazine published the top 20 highest earning soccer players in the world. Subsequently an article in a French economic publication appeared where the author tried to connect the dots between performance and pay. The measure used was number of goals scored by player/earnings in 2012. Is this a good measure for estimating the value of a football player and thereby presumably his salary? What if the player was injured? What if he is a defender? What if he has scored a lot of goals versus weak teams but never performs on the grand stage? What if... Of course it would be possible to take such factors into account simply by adding it to the equation. So instead of one variable we could use 5 or 10 or 15 or X. It might improve the accuracy but it would for sure complicate things enormously.

In the real world and in the real economy we have a phenomenon called "price". In reality price is what binds the economy together by aggregating a lot of dispersed information into one simple measure making it transparent and universally accessible. Breaking down the price of a cup of coffee at a café would include location, competition, wages, legal regulations, utility prices, world market price of coffee beans, demand, seasonality etc. All of these factors go into determining the final price the end consumer will pay for a regular cup of coffee. But instead of having to deal with each bit of information separately it is all aggregated in a price just as individual prices are also aggregations of prices elsewhere in the value chain.

In this context we use the sale of soccer jerseys printed with a name and number as a kind of "price". The reason for this is that we believe that their sales pattern to a certain extent is made up by a lot of disaggregated information in the system. So instead of trying to work out an elaborate equation with 15 variables we try to find a single measure where all these variables are comprised and even analyzed and weighted: Fan purchases.

The fans who buy the soccer jerseys make very informed choices about what to purchase. They follow the matches, the club, the players etc. closely so they have a lot of information available at hand. Furthermore they also make choices along the way as to which player to choose over which and how to weigh, for instance loyalty towards the club versus scoring a lot of goals.

Relating to the structure of the player's salary this is a very adequate measure since all three pillars are involved in deciding which player to choose for a jersey. Salary paid by the club usually reflects the player's ability to play football. Only for a select few, their media rights and celebrity status is of interest. The bonuses reflect whether the team wins or loses. The endorsement deals reflect the player's commercial value to big sponsors. When a fan buys a jersey personalized with a player he will surely choose someone who is good at playing football. A winning team and trophies in the cabinet always inspire the fans to purchase. A player's character and personality, looks and off-field behavior are surely important as well. Who wants to wear the jersey of someone who is taking illegal substances or whose off-field behavior brings negative headlines...

To sum up: What is the value of a soccer player? Is he underpaid or overpaid? Does he make too little or too much from endorsement deals? While determining pay is always a hard thing to do one can try different tactics in order to construct some useful measure for evaluating this aspect. CEOs can have their performance bonuses linked to how their company fares compared to the industrial average or how their main competitors do. That is harder to do with football teams since it is all about winning and not some relative measure.

So we try to link pay with percentage of jerseys sold for a team. We do not take absolute numbers since we try to strip out the effect that Real Madrid is immensely more popular than for instance Manchester City. Therefore no City

player would ever stand a chance to match the top selling Real Madrid players. But even if Real Madrid sells ten times the number of Man city jerseys it does not mean that the players are 10 times as good or 10 times as valuable. So we try to use a relative measure: percentage of personalized jerseys sold for a club instead to strip out the club effect. Unfortunately we do not have sales data for all players on the France Football 2013 list over the top earning football players.

Messi is the highest earning among the players on our list so he is set to index 100. A number below 100 indicates that the player sells few jerseys relative to his total salary. A number above 100 the opposite. Not many surprises really. The figures for Ibra, Aguero, and Silva are somewhat dubious with regard to reliability of data.

NAME	INDEX
Kaka	13
Lahm	19
Benzema	21
Yaya	23
Tevez	23
Rooney	42
Casillas	74
Torres	88
Messi	100
Silva	108
Ronaldo	125
Aguero	181
Schweinsteiger	246
Ibra	318



Haute Couture  
Finals 1 - 10

# 1/10

# Manchester United

- Printing: Sporting ID
- Kit: Home
- Season: 12 / 13
- Color: White / Black
- Material: Sencilla Flock

## Fashion

Generally speaking the Premier League clubs are disadvantaged when it comes to assessing their name and number kits since they have to conform to a standardized style of Premier League letters and numbers. One has to be lucky to get a good match between jersey and printing since the jersey is usually not designed to match the printing. But for the red checkered Man United jersey with black accents the white /black printing works fantastic. The white color looks great on the red background while the black edge goes well along with the black neckline, trims, and other details. The Sencilla material which feels like felt and is thicker than plastic was quite popular among the designers. Among the fans some people like it others very much oppose it as old-fashioned and clumsy. The sleeve badges were deemed a total disaster from a design perspective but that is beyond the scope of this analysis. To sum up: A lucky fit but a very potent one.

---

Design Score: 8/10

Rank: 1

## Finance

Manchester United has a lot of fans. Some buy the jersey blank for the club. Others add a custom name, yet others prefer a player. The arrival of Kagawa and v. Persie has



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definitely helped to boost personalized jersey sales. The availability of custom names is also helping. A stylish name and number set which connects well with the jersey is less of a factor but still important. All in all Man United sits comfortable at the front of the race on the financial dimension.

---

Personalization Percentage: 70%

Rank: 3

3 most popular players:

PLAYER	PERCENTAGE %
v. Persie #20	35
Kagawa #26	17
Rooney #10	12

## Final

Manchester United has the most successful printing of all for the season 12/13. Congratulations to the Red Devils! The white/black Premier League name and number set for the red/black Man United jersey 12/13 was just spot on! This brilliant fit secures Man United an uncontested first spot for the best Haute Couture 12/13.

---

Average: 2

Final Rank: 1

# 2/10

< 73 >

## Juventus

- Printing: Stilscreen
- Kit: Home
- Season: 12 / 13
- Color: White / Black
- Material: Subliflex Plastic



### Fashion

The Juventus home printing 12/13 can be labeled with one single word: classy. It really is a no-bullshit clean and elegant design with nothing superfluous interfering with a timeless look. Furthermore the printing has been well-integrated into the design of the jersey with a black field on the back where to place the numbers. The designers liked this clean and clutter free design. The material had a nice feel to it and the integration with the jersey was very successful. Therefore Juventus ends up at the top of the list when it came to assessing the strength of the printing. Some might consider the plain white as boring but it was not a complaint that we heard.

Design Score: 8/10

Rank: 1

### Finance

A jersey designed in order to carry printing or badges gives the fan an extra incentive to purchase it including the customization feature. Besides that what drives personalization of jerseys is primarily class players, secondly 'made to measure' options. The data available for this survey only includes player name and numbers. Del Piero was "The Man" at Juventus for the season 11/12. Pirlo took over after his splendid EURO 2012. Together the two have been driving

personalized jersey sales for Juventus. The Juve squad may be thin on true global superstars but still it does manage to sell a relatively high percentage of jerseys personalized with a player name and number.

Personalization Percentage: 65% Rank: 6

3 most popular players:

PLAYER	PERCENTAGE %
Pirlo #21	45
Del Piero #10	32
Marchisio #8	16

### Final

Juventus comes second only trailing Manchester United at the top of the list. That is a very solid performance taking into consideration that Juventus has been down and out for 6 years before finally winning the Scudetto again in 2012. But the clean look of the printing combined with some high class and resilient players have made all the difference for La Juve.

Average: 3.5

Final Rank: 2

# 3/10

## Real Madrid

- Printing by: Sporting ID
- Kit: Home
- Season: 12 / 13
- Color: Blue / Turquoise
- Material: PU Plastic



< 74 >

### Fashion

Contrary to the jersey itself the printing is not a stand-alone product but rather a complement. Thus it is harder to evaluate than the jersey because it will more often than not be seen in conjunction with the jersey. If the two go well together the overall evaluation of the printing will be more favorable. Components like design, color scheme, material, and connect to the jersey are all valid. In this context the Real Madrid 12/13 printing does well. Some designers were not thrilled about the pattern of mixing colors. Others quite like the idea. The material got the thumb up and the connect to the jersey was also fine.

Design Score: 7/10

Rank: 4

### Finance

How attractive is the printing? Well, apart from the visual component, and the price it depends to a very large extent on the quality of the players. A jersey from a club with few star quality players will almost automatically sell fewer customized jerseys than a club with one or more star performers. The availability of a custom name option can also influence the outcome. In the case of Real Madrid the conditions are favorable: not only does the club have a number of stars it also has a superstar of global proportions.

One factor detracting is of course price. A customized jersey costs more than just a regular blank jersey.

Personalization Percentage: 70%

Rank: 3

3 most popular players:

PLAYER	% SOLD
RONALDO #7	61
ÖZIL #10	10
SERGIO RAMOS #4	8

### Final

Real Madrid ends up third behind Man United and Juve. Real Madrid benefits from having its own printing style made only to fit with the Real Madrid jersey. Jersey and printing go well together and blue has always been a powerful color. Real Madrid ends up as a shared second with La Juve but loses the fashion component tiebreaker. Having a Ronaldo in the team brings traction to the numbers.

Average: 3.5

Final Rank: 3

# 4/10

## Chealsea FC

< 75 >

- Printing: Sporting ID
- Kit: Home
- Season: 12 / 13
- Color: White / Black
- Material: Sencilla Flock



### Fashion

Intro: A setup with a blue/gold jersey and a white/black printing. Of course Chelsea had to be slammed by the designers for such a mess. Though a gold/white style is available among the standard Premier League colors available Chelsea opted for the white/black. It just did not connect well with the jersey and therefore Chelsea would score much lower than Man United on this dimension though the printing applied is the exact same! For international competitions Chelsea uses a gold colored name and number set but that does not count in this context.

---

Design Score: 6/10 Rank: 7

### Finance

After winning the Champions League and after adding young and coming stars like Oscar and Hazard, Chelsea has been hot. The fans seem not to be bothered with any color mismatch between jersey and printing. What matters are the players and a winning team. Chelsea is the only club of those analyzed with 5 players selling more than 10% of those jerseys printed with a player name and number: Hazard, Torres, Oscar, Mata, and Lampard. Add to that loads of customized jerseys and jerseys printed with just Premier League sleeve badges.

Taken all together this is why Chelsea is the club of all with the highest percentage of personalized jerseys.

---

Personalization Percentage: 75% Rank: 1

3 most popular players:

PLAYER	% SOLD
HAZARD #17	27
TORRES #9	23
OSCAR #11	12

### Final

Now that the 13/14 Chelsea jersey moves away from the gold theme and back to a classic blue/white color scheme the design score will most likely go up. If the popularity of the players and of the club in general after a year with no big triumph will remain un-scattered is yet to be seen. But for the season 12/13 Chelsea has done very well though one big issue detracts from the final score.

---

Average: 4 Final Rank: 4

# 5/10

## FC Barcelona

- Printing: Sipesa
- Kit: Home
- Season: 12 / 13
- Color: Yellow / Silver
- Material: Plastic

### Fashion

Yellow is always a contentious issue. The color itself is not considered very pretty by most. In the right context it may get to carry a certain symbolism though as the carrier of values replicating a flag. Red and yellow are the Spanish colors as well as the Catalan ones. Yellow will always be an important contrast or accent when it comes to building FC Barcelona products. So for the Barca fan yellow will be important and significant. For a fashion designer the consideration is different. Does it look good? How does the printing connect to the jersey etc. The 12/13 Barcelona font is quite distinctive. It looks more like the convoluted font that Puma uses than anything else. The surface of the material is kind of coated and has a rubber like feel to it. To sum up: The designers were not overly thrilled but opinions diverged from very low to above average scores.

---

Design Score: 6/10

Rank: 7



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number set distinctive and carries a certain symbolism and therefore most fans would think that it adds to the jersey from a design perspective. And then there is Messi.

---

Personalization Percentage: 72%

Rank: 2

3 most popular players:

PLAYER	% SOLD
MESSI #10	56
INIESTA #8	10
XAVI #6	7

### Final

Barcelona does well but the design is not of everyone's liking. And then there is the Messi.

---

### Finance

FC Barcelona has the best player in the world in its ranks. It has a number of Spanish World and European Champions. The club is popular and has many fans so custom jerseys also sell well. Therefore it is no wonder that Barcelona sells a lot of personalized jerseys. The yellow color makes the name and

---

Average: 4.5

Final Rank: 5

# 6/10

## AC Milan

< 77 >

- Printing: Stilscreen
- Kit: Home
- Season: 12 / 13
- Color: White / Black
- Material: Subliflex Plastic



### Fashion

The white name and number set with the black edge is by the very look of it rather classy. Add to that the fact that the name and number set connects well with the white collar and the black stripes in the garment and you have a potent and well-balanced expression. The AC Milan name and number set would go right to the top of the list alongside with Juventus and Man United. The material feels nice to touch and the club logo stands out to enforce the visual brand identity. If anything would detract it would be the font which appeared slightly angular to some.

---

Design Score: 8/10

Rank: 1

### Finance

The 12/13 AC Milan jersey and printing would suffer from bad results and the outflow of top players. The fortunes were somewhat reversed after Xmas but too late to make up for the bad start to the season.

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Personalization Percentage: 55%

Rank: 9

3 most popular players:

PLAYER	% SOLD
EL SHAARAWY #92	38
BALOTELLI #45	19
PRINCE #10	17

### Final

To sum up: a Strong design showing but a Weak financial score. That is pretty much the haute couture feature of the AC Milan home jersey 12/13. With Balotelli and El Shaarawy in the squad and with improved results AC Milan will surely score better on the financial dimension for the season 13/14. If the design will keep up only time can tell.

---

Average: 5

Final Rank: 6

# 7/10

## Manchester City

- Printing: Sporting ID
- Kit: Home
- Season: 12 / 13
- Color: Black / White
- Material: Sencilla Flock



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### Fashion

Manchester City gets the same lucky bounce as Manchester United with regard to the print connect 12/13. Man City happens to have a lot of black accents on the jersey 12/13. The predominantly black name set fits well with the black contrasts on the jersey itself. The white outline does no harm but simply emphasizes the black without really interfering with the overall expression.

---

Design Score: 7/10

Rank: 4

### Finance

Man City has been quite effective in selling personalized jerseys. Thus the club is at the high end of the table. A couple of class players coupled with custom name option and a name kit fitting well with the jersey may explain this.

---

Personalization Percentage: 65%

Rank: 6

3 most popular players:

PLAYER	% SOLD
KUN AGUERO #10	56
SILVA #21	28
BALOTELLI #45	11

### Final

Manchester City has come up with a decent but average performance and takes 7th place. Not much to point fingers at and not too much to be overly excited about. A good solid performance says it best. Man City ends up on a shared 6th spot with AC Milan but loses the design tiebreaker.

---

Average: 5

Final Rank: 7

# 8/10

## Paris Saint-Germain

- Printing: Monblason
- Kit: Home & Away
- Season: 12 / 13
- Color: White / Red
- Material: Plastic



### Fashion

The Paris-SG printing for the season 12/13 is white with a red edge corresponding nicely with the theme of the jersey. The color match may not be 100% but different shades of white usually go unnoticed which helps. The size of the name and numbers is rather small which can have a negative impact visual in particular on larger size jerseys. The feel of the material seems "cheap", thin and fragile though. The navy blue is also slightly visible through the white numbers. To sum up: A mixed bag.

---

Design Score: 5.5/10

Rank: 10

3 most popular players:

PLAYER	% SOLD
IBRA #18	89
PASTORE #27	11

### Final

PSG does well but can certainly improve on the design side. For a fashionable club from a fashion city the bar it set high. PSG will be interesting to follow over the next couple of years. Change is in the air.

---

Average: 6.5

Final Rank: 8

### Finance

Great players help sell personalized jerseys. PSG has one of the greatest in the game. Therefore PSG is set to sell a high percentage of personalized jerseys. With a continued flow of high quality players checking-in in Paris this trend seems set to continue.

---

Personalization Percentage: 70%

Rank: 3

# 9/10

## Liverpool FC

- Printing: Sporting ID
- Kit: Home
- Season: 12 / 13
- Color: White / Black
- Material: PU Plastic



< 80 >

### Fashion

While City and United had a lucky bounce with regard to their printing Liverpool and Chelsea were less fortunate. The white/black printing style used with the Liverpool home jersey does not match the red/yellow color scheme of the jersey particular well. White/black may be neutral in principle but it breaks with the great consistency of the jersey which is otherwise simplistic in a very structured way.

---

Design Score: 7/10

Rank: 4

3 most popular players:

PLAYER	% SOLD
GERRARD #8	37
SUAREZ #7	31
AGGER #5	20

### Final

The design of the name and number set got a decent score. The connect with the jersey was not so successful. But most designers valued style and feel of the printing higher than the jersey connect. On a final note: In order to improve their numbers game and thereby the overall score Liverpool has to sell more personalized jerseys. A new Premier League style for the season 13/14 may help the design score if lucky.

### Finance

Liverpool does sell a significant number of jerseys. Liverpool also sells a lot of personalized jerseys but not quite as high a percentage as the other clubs analyzed. Lack of class players? Key players injured? More interest in and support of the club than just the passing players? Hard to know why but the numbers do seem to tell a story.

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Personalization Percentage: 55%

Rank: 10

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Average: 7

Final Rank: 9

# 11/10

## FC Bayern München

< 81 >

- Printing: Deko Graphics
- Kit: UCL Away
- Season: 12 / 13
- Color: Silver
- Material: Plastic



### Fashion

The FC Bayern Champions League printing for the season 12/13 is similar in style to the one used for the home kit. The style is fairly simple, kept in a single colorway, and rather small. The shade of the color differs somewhat from the silver stripes on the jersey. The feel of the material seems thin and fragile.

---

Design Score: 5/10

Rank: 11

3 most popular players:

PLAYER	% SOLD
SCHWEINSTEIGER #31	55
GOMEZ #33	20
MÜLLER #25	7

### Final

FC Bayern will launch a new name kit for the season 13/14. It will be interesting to see if the design has got an overhaul. An upgrade from 1.0 to at least 2.0 would be much welcome. New quality players are set to arrive and the good results will most likely continue. That should make the personalized product very attractive for the year to come.

### Finance

FC Bayern has a very exciting team with a lot of great players. The collective stands as the defining element though but there are enough quality players to choose from in order to make it attractive for the fan to opt for a personalized jersey.

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Average: 9.5

Final Rank: 11

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Personalization Percentage: 64%

Rank: 8

# 12/10

## SSC Napoli

- Printing: Deko Graphics
- Kit: Home
- Season: 12 / 13
- Color: White / Navy
- Material: ECOblock Plastic



< 82 >

### Fashion

The Napoli printing 12/13 was labeled mostly as "retro". A dark Shadow and an attempt to give it some kind of 3D effect gave it this predicate. The small Napoli logos engraved in the numbers are hard to spot at a distance and the placement of the logo seems disruptive to the entire structure of the design. Napoli did not fare well with the designers.

Design Score: 5/10

Rank: 11

### Final

Napoli will have to do better design wise. With regards to sales of personalized jerseys it is hard to estimate the situation due to limited selection available and thus unreliable data. But Napoli does reasonable well there. TV drives the industry so participation in the UCL could make a difference as well.

Average: 12

Final Rank: 12

### Finance

Napoli does sell some personalized jerseys since they have some class acts in the likes of Cavani and Hamsik. But due to the limited printing options available it can be hard to compare the figures of Napoli with those of other clubs.

Personalization Percentage: 50%

Rank: 12

3 most popular players:

PLAYER	% SOLD
CAVANI #7	80
HAMSIK #17	10

# 13/10

## Borussia Dortmund

< 83 >

- Printing: Deko Graphics
- Kit: Home
- Season: 12 / 13
- Color: Black
- Material: Plastic



### Fashion

The Dortmund home printing for the season 12/13 is produced in the same font as used for other Puma teams. The only difference being the BVB logo at the bottom of the numbers. The font is rather special since it has an asymmetrical shape. The color is slightly faded and the feel of the material seems "cheap".

---

Design Score: 3/10

Rank: 13

3 most popular players:

PLAYER	% SOLD
GÖTZE #10	55
REUS #11	45

### Final

Dortmund can only improve. Even if Puma has some underlying agenda aiming at producing something disruptive I am not sure if they succeed. If Dortmund can hold on to their top players and develop them further the personalization percentage will almost certainly go up. Their run in the UCL has been the perfect shop window to the world for predators and fans alike.

### Finance

Dortmund has a very exciting team with some very exciting players. With a larger selection of printing options and more awareness of the availability of official names and numbers surely the 50% would have been passed. But for now BVB ranks near the bottom of the list for percentage of personalized jerseys. Whether a relatively poor design also plays a role is uncertain.

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Personalization Percentage: 50%

Rank: 12

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Average: 12.5 Final Rank: 13



Fly  
Emirates

The Green Carpet  
Award 2012

# The Stars of the Game

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The Club, The Team, The Franchise, The Association. Without the players these institutions are nothing but an empty shell. Individual players may come and go but at any given time the club is defined by the players at its disposal. The primary focus of the media and the fans: The players.

Players are not just players though. There are stars and role players just like in the movie industry. There are even Super Stars whose stardom goes way beyond that of the football industry and who become household names and personal brands in their own right.

All entertainment industries live off the star performers and in particular the Super Stars. Their stardom bestows the entire industry and glues it all together. Without these beacons of light taking the spotlight and illuminating mere mortals there would be no prowess.

The biggest stage for the movie stars is the red carpet. This is the only time when they engage live and in real time with their audience. For the rest of it they appear only on recorded media and there is no direct way for the audience to engage with the actors.

For the footballers the biggest stage is the field where they ply their craft. This is very much live and in real time for the crowd in the stadium as well as for the TV audience. The biggest stage for the footballers is The Green Carpet, the green grass field. The star performers feel at home here, at their best. They often seem out of place and awkwardly limited when being interviewed after a match or when turning up for a gala award in tuxedo.

We believe that the greatest place of expression for the footballer, the star performer and the SuperStar is the field. Which is also the place laying the foundation to his fame. Therefore we have called the final section of the Soccer Jersey of the Year 2012 report, the Green Carpet Award 2012. This section is dedicated to the Stars of the beautiful game and the ensuing jersey economy surrounding them.

# Who's Hot and Who's Not

The 23 nominees for the FIFA world player of the year 2012 + 2 Danish players made up our group of nominees for the Green Carpet Award 2012. The FIFA World Player award was an attempt to determine who was the best footballer in 2012. We added to that by asking: who had the greatest on field appearance: Charisma, looks, uniform? We used the same players and the same scoring system: 5,3,1 points. Therefore the data and the lists are compatible and comparable.

Below we have presented the two rankings side by side. Bendtner and Eriksen have been included in the Green Carpet Award in order to round up to 25.

GREEN CARPET PLAYER	%	FIFA PLAYER	%
Ronaldo	20.2	Messi	41.6
Messi	15.1	Ronaldo	23.7
Ibrahimovic	11.6	Iniesta	10.9
Balotelli	7.8	Xavi	4.1
Sergio Ramos	4.7	Falcao	3.7
van Persie	4.7	Casillas	3.2
Iniesta	4.3	Pirlo	2.7
Buffon	4.3	Drogba	2.6
Casillas	3.6	v. Persie	1.5
Xavi	3.5	Ibrahimovic	1.2
Neymar	3.4	Xabi Alonso	1.1
Pirlo	3.4	Yaya Toure	0.8
Xabi Alonso	2.0	Neymar	0.6
Rooney	1.9	Özil	0.4
Drogba	1.9	Rooney	0.4
Özil	1.8	Buffon	0.4
Falcao	1.5	Kun Aguero	0.3
Eriksen	1.3	Sergio Ramos	0.2
Benzema	0.9	Neuer	0.2
Neuer	0.8	Busquets	0.2
Kun Aguero	0.6	Pique	0.1
Bendtner	0.4	Benzema	0.1
Pique	0.3	Balotelli	0.1
Yaya Toure	0.1	Bendtner	N/A
Busquets	0.0	Eriksen	N/A

Balotelli seems to make more of an impression on the fans than on his peers. Same seems to hold true for Sergio Ramos. Ibrahimovic' also makes a huge leap from 9th as a footballer to 3rd as a performer. Buffon has more charisma than his value as a football player while in the case of Yaya Toure it seems to be the other way around.

One cannot exclude the possibility that many fans have voted for their favorite footballer based on his footballing skills rather than his appearance. That might explain why the two lists do resemble one another to a certain extent. We would not think that the opposite could be the case. Or could players, coaches, or media have voted for a player due to his on stage appearance and theatrical skills?

Ronaldo and Messi are top of the pops as usual. FC Barcelona and Real Madrid. No matter which way you turn or how you twist the numbers these two always seem to come out on top.

But in any case we are glad that players like Balotelli, Sergio Ramos, and Ibrahimovic' who all add a bit of extra flair to the game are not forgotten by the fans. These players seem to have the backing of the fans in order to make the beautiful game a bit edgier.

## List Mania

According to France Football these are the 20 top earners in the world of football 2012.

We have placed an 'N' next to a player not awarded for the FIFA 2012 player of the year award. An 'Y' for a player who was.

NAME	FIFA
Beckham	N
Messi	Y
Ronaldo	Y
Eto'o	N
Neymar	Y
Aguero	Y
Rooney	Y
Ibra	Y
Yaya	Y
Torres	N
Tevez	N
Silva	N
Kaka	N
Schweinsteiger	N
Lahm	N
Casillas	Y
Drogba	Y
Buffon	Y
Conca	N
Benzema	Y

11 players are present on both lists meaning that money and skills do go hand in hand to a certain extent. And since contracts are sticky one might even expect a certain time lapse before skills are being rewarded/penalized. Next year both lists will surely see a lot of new entries and ditto exits while a few things will remain the same.

Did anyone say Ronaldo, Messi? ...Messi, Ronaldo anyone?

# Is it the Shoes?

Is It The Shoes? (Ref: Spike Lee – Michael Jordan commercial) Which make the best players do their magic on the field...

A number of people have reflected upon the role of shoes in life. Below a few famous quotes which have been modified slightly to fit to the world of football. We have left the first quote untouched though.

→ “Shoes are a mirror of what you want, what you are or what you’re missing. Christian Louboutin.”

→ “What do footballers want? Classy boots!”

→ “Give a footballer the right footwear and he can win it all!”

→ “A pair of boots can change your life. Just ask Mike Hanke.”

Nike and adidas combined sell an estimated 90% of the world's football footwear. Most of the world's top players wear either Nike or adidas boots. The most popular and the most hyped boots are the lightweight models worn by many strikers and attacking midfielders.

Cristiano Ronaldo wears the Nike Mercurial line while Lionel Messi is equipped with the adidas F50. To underline the importance of these two players they even have their own dedicated lines CR7 and M10. In the past topstars like Ronaldinho R10 and David Beckham DB have been shown a



similar honor but it only befalls a very limited number of players. For the vast majority of players the boots they wear is standard feat. No fancy individual design there.

The footwear industry is big business so a lot of effort is invested in developing the boots technically and design-wise. The key to success is the marketing though. The essence of the marketing is that the stars of the game wear the boots during a match. Launch of new models is timed accurately to ensure maximum media exposure. A Big match, An Important tournament, and new lines of boots are introduced.

In the world of fashion there is the "IT bag". In the world of football there is the "IT boot": The one determining piece of an outfit. Therefore even footballers playing at a relatively low level are willing to shell out significant money to acquire the right boots. The boots are considered equally important as a tool and as fashion statement. Both aspects are important.

Is it the shoes? It is the shoes! Form and function go hand in hand.

Function and functionality is hard to transfer to the media which is visual and not physical. Thus in order to make a marketing campaign successful the footwear has to have an enticing design. In order to be seen on TV during matches the footwear also needs to be clearly identifiable. Thus visual design matters!

Jerseys are closely linked to club affiliations. Footwear is linked to individual players and not very much to club or national team. A Barca fan may wear Ronaldo boots without any repercussions. Same holds for a Madrid fan wearing F50 boots. At the same time the athletic apparel sponsors do try to vie as many players as possible over to their lines of footwear at the clubs they sponsor. But to the fans and amateur footballers the link is not always so obvious. Many people even shop for a pair of boots according to price, comfort, design etc. factors completely unrelated to players or teams.

## It's Gotta Be The Shoes!



# Are Star Players Invaluable?

The French sports publication France Football publishes a top 20 list over the highest earning football players each year in March covering the previous year. The list below covers the year 2012. The figures include 3 revenue streams for the athlete: Salary, Bonuses, and Endorsement deals. Conca is an Argentinian footballer playing in China on a huge contract.

France Football 2012 List

NAME	TOTAL M. € EURO
Beckham	36.0
Messi	35.0
Ronaldo	30.0
Eto'o	24.0
Neymar	20.0
Aguero	19.0
Rooney	18.0
Ibra	17.5
Yaya	16.6
Torres	16.3
Tevez	16.2
Silva	16.2
Kaka	14.5
Schweinsteiger	14.0
Lahm	13.5
Casillas	12.7
Drogba	12.6
Buffon	12.4
Conca	12.1
Benzema	12.0

The following table shows the size of the economy of the home country of a player in billion dollars. The figures are from the IMF for 2012. The index shows the size of the economy compared to the endorsement deals of the player. Most football players derive the majority of their sponsorship deals from their home country. Beckham has by far the highest commercial revenues of all players and we have therefore set him to index 100.

NAME	NATIONALITY	GDP B. \$USD	INDEX
Eto'o	CM	24	1042
Drogba	CI	24	893
Yaya	CI	24	744
Ronaldo	PT	210	561
Messi	ARG	474	332
Beckham	UK	2433	100
Aguero	ARG	474	83
Neymar	BR	2425	35
Tevez	ARG	474	32
Ibra	SE	520	30
Torres	ES	1340	27
Buffon	IT	1980	22
Silva	ES	1340	16
Casillas	ES	1340	16
Rooney	UK	2433	13
Kaka	BR	2425	12
Benzema	FR	2580	11
Schweinsteiger	DE	3366	8
Conca	ARG	474	8
Lahm	DE	3366	7

One area where the players can generate commercial revenues unrelated to their nationality is from footwear deals with adidas, Nike, Puma and the like. This helps the African players on the list. They also generate commercial revenues in a different way: By signing deals with state backed monopolies paying over the market rates for being able to use the image rights of national heroes for their advertising campaigns. But these are outliers and special circumstances.

It gets more interesting looking further down the list... and then we reach Ronaldo and Messi. Ronaldo, Messi, and Beckham are the true GLOBAL superstars in the world of football with a global appeal reaching way beyond their home audience and thus making them attractive partners for multinationals anywhere. Kun Aguero does very well indeed and either he must be a very big name in Argentina or he must have an appeal which lands him deals also with

companies advertising to a non-Argentinian audience.

One would think that Schweinsteiger as the franchise player in the club with the highest commercial revenues in the world, as a native in the biggest European market etc. could make more from endorsement deals. But maybe he is simply not interested. S31 makes 3.6 million Euro. Compare that with 3.5 for Eto'o or 3.1 for Lahm or 5.5 for Kun Aguero. One would think that Ibrahimovic' could probably make more from his endorsement deals as well. Ibra makes 2.2 million Euro. But maybe he is not interested, he may prefer to spend time with family rather than shooting commercials or maybe it is the "small market effect" kicking in from being a native of Sweden.

But in any case these top-footballers do make a very healthy salary which would make even bankers or CEOs envious.



Green Carpet Award 2012  
Finals 1 - 10

# 1/3 Cristiano Ronaldo

- Nationality: Portuguese
- Club: Real Madrid
- Position: Forward
- Footwear: Nike Mercurial



## Fans

Cristiano Ronaldo may have lost out to Lionel Messi in the FIFA World Player of the year Award. But when it comes to on field appearance the fans have voted univocally for Ronaldo. Cristiano is an icon and has star quality. His venue is more than anywhere else the green carpet – that is where his action is.

---

Percentage of votes: 20%

Rank: 1

## Finance

Cristiano Ronaldo is the third highest paid soccer player in the world trailing only Beckham and Messi. When it comes to endorsement deals Cristiano also comes third but with a wide margin to fourth. Cristiano also sells loads of jerseys. So no matter how you look at it Ronaldo is at the very upper echelon what we would call global elite. His appeal as an icon goes way beyond his native Portugal or his current home of Spain.

---

Jersey Sales Index: 125

Rank: 4

Global Appeal Index: 561

Rank: 4

## Final

Cristiano Ronaldo wins the Green Carpet Award 2012 hands down. He delivers on all parameters and he is a fan favorite: Appearance or play? You name it Ronaldo has got it! Financially things look very solid as well. CR7 is indeed a strong personal brand!

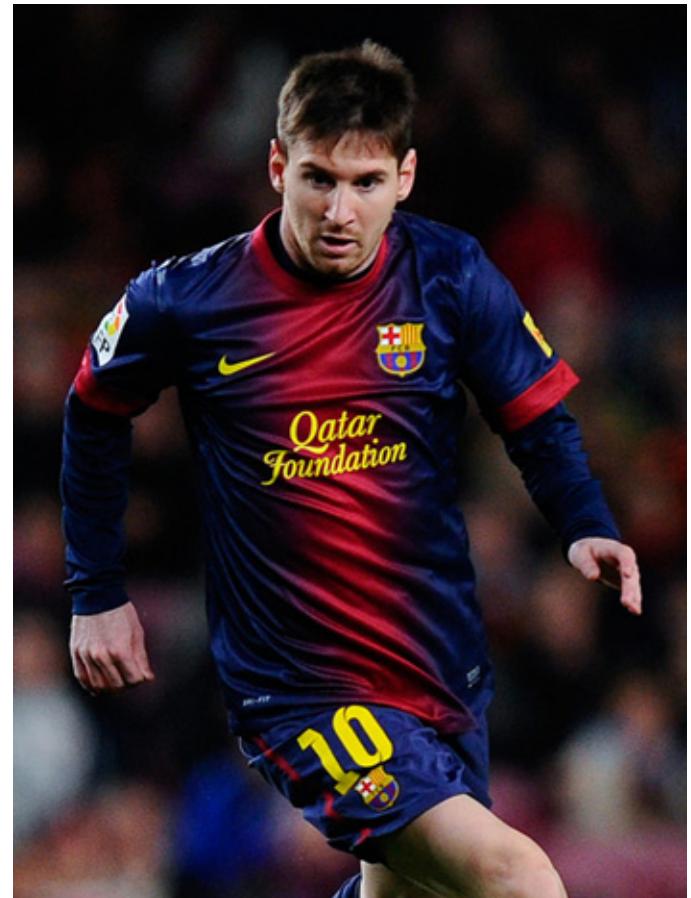
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Final Rank: 1

# 2/3 Lionel Messi

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- Nationality: Argentinian
- Club: FC Barcelona
- Position: Forward
- Footwear: adidas F50



## Fans

The fans love Messi. They are with him on and off the field. Messi was voted in second as the player with the greatest on field appearance: The looks, the charisma, the uniform. Messi speaks with his feet and he is rewarded for it. The Golden Boot will soon be crafted according to the measures of his left foot.

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Percentage of votes: 15%

Rank: 2

## Final

Messi does well and ends up second after Ronaldo in the Green Carpet Award 2012 contest. A clear and undisputed second. Lionel is no further behind than he might go top next time around versus eternal rival Cristiano. But watch your back. PSG is coming and with both Ibra and Becks onboard there might be trouble lying ahead. Messi is top-class and he will be at the top of the class as long as he plays the beautiful game

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Final Rank: 2

## Finance

Messi is a personal brand with global reach and appeal. Turkish Airlines do not do much business in Argentina but Messi is their choice of front figure for their commercials. Messi is the second highest earner in the world of football after Beckham. Messi has the second highest commercial income thanks to his global appeal as being the best footballer in the world. Messi also sells loads of jerseys.

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Jersey Sales Index: 100

Rank: 6

Global Appeal Index: 332

Rank: 5

# 3/3 Zlatan Ibrahimovic'

- Nationality: Swedish
- Club: Paris Saint-Germain
- Position: Forward
- Footwear: Nike Mercurial



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## Fans

The fans love Ibra for his footballing skills and for his on field appearance. Ibra is a hot ticket in the world of football. Ibra is even more beloved for his appearance and his personality it seems than for his unquestionable qualities as a footballer.

---

Percentage of votes: 12%

Rank: 3

## Finance

Ibra sells a lot of jerseys wherever he goes. The data for his time with PSG are a bit unreliable though but Ibra is definitely a big seller. For the Swedish national team he is essentially a one man army.

---

Jersey Sales Index: 318

Rank: 1

Global Appeal Index: 30

Rank: 10

## Final

Ibra is world class. Ibrahimovic' is a well-established star performing at the highest level and drawing the attention of the global sports media. He looks set to maintain his spot in the select global elite of star players. Ibrahimovic takes third spot in the Green Carpet Award 2012 a full 7 places better than his 10th spot in the FIFA World Player of the year 2012 Award

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Final Rank: 3





# Colophon

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