

Università degli Studi di Palermo
School of Education
Degree Course in Communication Science
Department of Institutional Communication and Company
Marketing

From Theatre of Dreams to Pink Power
Manchester United PLC and U.S. Città di Palermo's
Marketing Strategies



Abstract of degree thesis by:
Claudio Ballor

Thesis Supervisor:
Prof. Paolo Di Betta

Academic Year 2004/05

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A handwritten signature in black ink, appearing to read 'Paolo Di Betta', positioned below the printed name of the thesis supervisor.

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This work summarises the original thesis submitted by Claudio Ballor at the graduation ceremony for the 12/01/2006 session of the University of Palermo in which he graduated with a final mark of 110/110 with distinctions. The unabridged thesis consists of 322 pages, of which the general index featuring the figures and tables, the bibliography, the list of newspapers consulted, and the list of websites consulted during the period of research, can be found at the end of this summary.

INDEX

1. STATUS QUESTIONIS (STATE OF THE INVESTIGATION).....	5
2. RESEARCH HYPOTHESES.....	8
3. EXPLANATION OF METHODOLOGY.....	16
4. CONCLUSIONS.....	19

1. STATUS QUESTIONIS

Fifty per cent of Italians (27.5 million people) are football enthusiasts, according to declining estimates. The global value of the phenomenon amounts to €30bn per annum with 600,000 people regularly working for this growing sector in Italy. The approaching World Cup in Germany will bring an economic benefit in the region of €10bn with an overall effect on the national GDP of 0.5%, and will create 40,000 jobs, 10,000 contracts of which being of a long term nature.

The lion's share of TV audience in Italy has always been obtained through football matches and, even outside Italy, spectatorship of this country's matches reaches 200 million thanks to international broadcasting agreements. Football championships are regulated by federations in 200 countries worldwide, while, even at an amateur level, 20.5 million Italians take part regularly and the numbers are increasing in quantity as well as throughout the social divisions. This has brought a notable increase to professional clubs' accounts in the shape of a financial boom which began in the 1990s, changing the face of company management, from that of the patron/president into industries which maintain the core business in football yet which have diversified, expanding into various other commercial sectors.

As the leader in this special classification for the last eight seasons, Manchester United's revenue totalled €259m for the 2003/4 season, whereas English football estimates *total* overall profits for the current season of €2,030bn.

How do modern clubs bring in the money needed to run the business? Substantially, from three areas: the exploitation of media rights, takings from the turnstile (in regular and season ticket sales) and commercial activity; not to mention the contributions received from leagues and federations. The first area is becoming increasingly important for the balance sheets, to the detriment of the second. In Italy especially, more than in other European countries, the major flux of money comes in through TV broadcasting totalling 55%. Spectators in England, Germany and Spain are more likely to actually attend matches, whereas for other commercial activities (exploitation of team images through resources such as merchandising, licensing and sponsorship), Italian teams are lagging behind other large European clubs.

The accentuation of business within football (in existence since spectators first had to pay to watch a match, and since the first use of football as a means of advertising in 1920s England) has transformed the field of commercial revenue. The most important clubs have become brands, multinational sporting clubs comparable to major cinema studios, record labels and television companies. Entertainment is the new battle field, in search of money that people spend on recreation, on having fun. Now, team players are yet another form of entertainment. In order to compete, clubs have established alliances with companies from other sectors and have begun to sell all manner of items, simply because the team name is printed on it. In the most significant cases, this diversification has pushed towards the creation of entertainment structures which differ from the primary product which is the match. But many extras are

tied into that such as the cinema, theme parks, worldwide fee-paying football schools, catering, the hiring out of stadiums for various events and services, and the sponsorship of almost everything from chairs to the stadium name. The result of this transformation is internationalisation. The decisions dictated by the marketing sector determine the same technical choices, from the purchase of players from economically attractive countries, to the pre-season tournaments around the world opted for instead of a more sound and settled-but less remunerative - preparation for the championship.

Although still incomplete in Italy, and in a more advanced state in England the process of industrialisation taking place in football clubs has led to a series of imbalances, first and foremost, in cost. Unlike companies in other sectors, football has frequently run its own affairs without paying due attention to the outgoings on the balance sheet, precisely because the company activity is closely linked to a pre-eminent social phenomenon. This is partly because the old style president would eventually 'fill in of the holes', and partly due to the dependence on *potentially* positive sporting results (and consequent revenue), which once unfulfilled, would create financial chasms and in the past have been the cause of more than one fall from grace. Over and above the economic losses, Italy, in a distinct way, has come up against an overexposure of the product on TV, with a consequent disaffection on the part of the spectators in the stadiums, a lack of adherence to international stadium standards and a universalised, scant sporting culture which have rendered attending the live event avoidable, as opposed to attractive.

2. RESEARCH HYPOTHESES

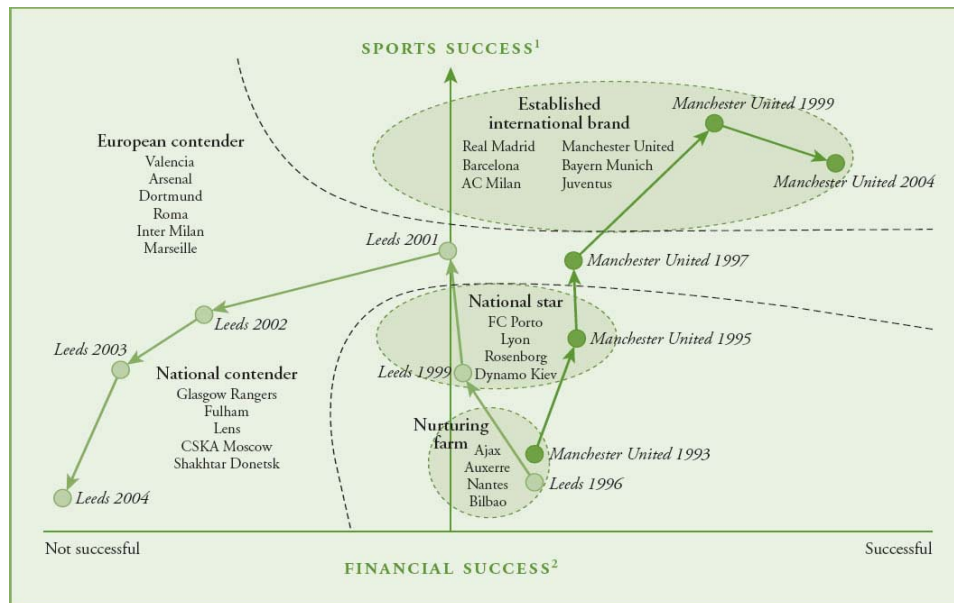
In modern football, what would be a suitable marketing procedure which could adapt in the search for its own space in the largest sector of the entertainment business? This question is the starting point in the verification of a two-part research hypothesis. Regarding the governing of the clubs, we have attempted to demonstrate that the diversification from the primary product (the match) and the industrialisation of the company activity structure have become vital and unavoidable for the clubs which prefer not to depend upon the magnanimity of a president who has to assume the responsibility of balancing the accounts at the end of the season. This is fundamental for teams that want to survive financially without depending only on the positive result on the pitch. In order to do this, a club should become an integral part of a community like other social institutions, becoming a point of reference for fans, but not solely.

The second point deals with the phenomenon in general, during a period of great success (in terms of popularity and economic revenue) but also one of problems which arise due to excessive presenza and exorbitant costs. The intention is to find an answer by going back to the roots, even though they have evolved into a football which today has different needs, which are, as much as possible, in the hands of the fans who play an integral role in the clubs and who are able to decide on a part, if not the whole of the administration. Examples of this type of club, of various calibre, have been treated as cases in this degree

thesis.

In conjunction with the fundamental research, the first hypothesis came down to the comparison of two case studies, Manchester United PLC and U.S. Città di Palermo. Exactly why were these two teams chosen?

The English team was the first top club that chose to walk the road of marketing. In 1993, Manchester United was a club that nurtured talented players in order to sell them on. In 1995 it had already become a national star team capable of competing for the title, and by 1999 it had completed its ascension to glory (see image below), which allowed it to become an established, internationally-recognised brand, a status which currently very few clubs in the world can boast.



Source: A.T. Kearney, 2004: 8

Palermo, however, is the local actuality chosen to be compared to the English squad, not to make improbable and disrespectful parallels, but so as to

understand if and how it would be possible to take advantage of the examples set by one of the benchmarks of the global football business.

Manchester United's long-standing greatness has been reaffirmed time and time again, hence the comparison between the two actualities cannot be to establish a classification of merit. The fascination of the club based at Old Trafford rejuvenates the myth of the 1960s, when the United 'Reds' and legends such as George Best contributed to the brilliance of that 'very British' period of the Beatles and James Bond played by Sean Connery. Before this, the great team had seen its very dreams of greatness shattered in a fatal accident at Munich airport in 1958, creating a strong wave of popular support and participation. In the 1990s, Manchester's administration was the first in European football to understand the importance of marketing, and the first capable of consciously taking advantage of the club's name thus allowing it to become a recognised label on an international level.

Research carried out by Professor Bill Gerrard of the University of Leeds, whose technique is illustrated in the explanation of the methodology (page 18), has shown that in recent years Manchester has created a virtuous circle of success feeding off itself, and that the *Red Devils* have been able to excel in all four fields essential to a club's success: playing resources, coach management, fanbase and general management.

The playing resources are due substantially to the ability to ensure the purchase of talented players and also to a good youth structure. Gerrard has focused his attention on the "tacit knowledge" where young boys who 'grow

up' within the club on all levels, including the first team, maintain a stability thanks to the minimal changes made each year which keep the method consistent. Before the arrival of the wealthy Abramovich at Chelsea several years ago, Manchester United had also the highest market spending ability and is still today one of the most attentive clubs in its handling of the youth sector. In the last 13 years (from 1992-93 to 2004-5), in fact, the percentage of young players in the football 'nursery' playing in the first team has been equal to 33.77% against Palermo's 12.26%. Actually, thanks to the arrival of new owner Maurizio Zamparini, rewards have begun to be reaped over Palermo's last few seasons as buying power has increased. The sphere of 'nurseries' and youth academies, however, should not be underestimated, as the possibility to save money on weighty contracts signing up young players, thus allowing them to improve and grow within that very club, is significant.

The second factor in Gerrard's theory also brings the virtues of stability into the frame. Alex Ferguson has been the manager of Manchester United since 1986 and his reign has coincided with the team's most successful sporting era. On average, United keeps their coaches on the benches for five-and-a-half seasons, which is one of the longest terms in the English championship and thus in turn rewards one of the most highly-awarded clubs. On the other hand, this stability hasn't been the case with Palermo. Over 76 years (since 1926), the coach has been replaced 75 times. Even Zamparini's management which, as seen before, pertains partially to Gerrard's model as far as playing resources are concerned, hasn't wavered from the trend. On the contrary, in four

seasons, there have been six different coaches.

The loyalty of the fanbase is the third factor taken into consideration in order to understand how a sustainable advantage in a large club is formed and made long-lasting both on and off the pitch in the form of turnstile sales and as ‘supportership’ potential. The *Red Devils* are among the most supported teams in the world with some 50 to 75 million fans,



Source: Manchester United PLC, 2002: 6

according to the observed source. The birth of this enormous and immense passion is explained, as seen, in part with a long-standing fascination, renewed through victories on the pitch thanks to a spectacular forward game, and partially to (hence the confirmation of the research hypothesis) a careful marketing management, with the capacity to create interest for the players even off the pitch, thanks to talented players rich in personality, authority, and charm. Examples are George Best, thirty years ago; Eric Cantona in the 1980s and 90s; and until the present day, David Beckham. Even today, they are looking for a successor to take Beckham’s crown. However, at Manchester United, the fanbase component (*see image above for a plan*) is extremely well handled and, as far as possible, the fans are acknowledged one by one. The fans are not just spectators but also, and more importantly, customers who, in a highly customer service-orientated culture like that of Great Britain, are served

in every which way. As with all large clubs, United has a fidelity system linked to their subscription quota. Supporters who sign up receive numerous benefits, hence the segmentation of the fanbase within the society's databases is as close to reality as possible. In 2004, 2,588,000 people registered and were then subdivided into "match-day customers", "non-match-day customers", "total current customers", "lost customers", "potential customers" and "total registered customers". It is precisely this careful attention towards the consumer that has markedly increased the commercial revenue of the club through the sale of thousands of items sporting the red devil mark, destined to people about whose tastes everything, or almost everything, is already known, combining the data already possessed with the data available in retailing, obtained by research agencies.

This is a field in which Palermo should invest a great deal. Even today, Palermo is the seventh largest Italian team in terms of numbers of fans (almost 880,000 in Italy alone), in the last season they shocked everyone by achieving an average match spectatorship of 33,230, a total selling-out, or just shy, of season tickets, and all this even before the season began. According to our estimation, Palermo fans around the world amount to around 1,350,000 and represent an enormous source of earnings. For example, if each fan bought merchandise valuing €5, the revenue in this area alone would amount to €6.75m or rather, much more than the amount made in the entire commercial area - sponsors included - in the year of Palermo's promotion into Seria A, 2003/4.

Regarding the fourth and final factor, the club management, over time, United has enjoyed the benefit of a managing team which has created functioning technical structures, feeding the necessary ability to obtain victories in order to create a following, and they have also taken advantage of these successes to obtain global notoriety, also thanks to their diversification. Today, Manchester United PLC relies on five subsidiary firms, has a joint venture with those who deal with relevant thematic TV channels and is associated with another company involved in the hotel industry. Manchester United has also signed a sponsorship contract with Nike worth €33.1m per year (not to mention the richest and most lucrative on the international panorama), and, on behalf of both companies, a separate firm manages all the sporting material with the Red Devils label. The recent purchasing of the club by American mogul Malcolm Glazer's family for the astronomical figure of €1.760bn shows the final value reached by the club during its fourteen-year experience on the stock market which saw the shareholder's profits double. In Palermo, as seen in the first point examined, everything has changed since the arrival of the new president, Zamparini. Previously there had been 43 presidents (and three bankruptcies) in 105 years of activity, now there is a delegated administrator (Rinaldo Sagramola) with ample experience of leadership of professional clubs, and a company structure moving towards that of the major clubs, with the institution of a marketing department in 2004.

The result of the four fields in Gerrard's pattern summarised above are echoed in the outcomes of the three areas from which football clubs draw in

profits: according to the most recently available balance sheets at the time of finalising this degree thesis, Manchester United have amassed €92m to Palermo's €20-€22m for media rights; €90.5m to Palermo's €10.5m for match day sales (from the turnstile, but not entirely as we will see further on); and €67m to Palermo's €4.1m for commercial activity (sponsorship, merchandising and licensing). This last figure for Palermo's case, is referred to Seria B, even though the monetary figures of Seria A are not much higher by comparison.

In percentage, returns on match days total 36% for the English and 29.2% for the Sicilians; those of the mass media total 37% to Palermo's 55-61.5%; and from commercial areas 27% to Palermo's 10% or little more. Hence, the area in which to invest is in the widening of the 'supportership' (which, for a local club like Palermo, means reinforcing territorial identity and the fans' sense of belonging to the Sicilian community) and a developing of the match day takings. This is where another fundamental outlet of modern clubs unfolds, in assets and possessions. Manchester United is one of the richest clubs in the world, partially because it possesses a ground like Old Trafford, conceived for footballing purposes and highly efficient training structures at Carrington. *Everything* belongs to the club. Palermo has to play on a ground rented from the Council for which no work can take place without the prior consent of the local executive council.

A modern stadium enables many things. Manchester possesses an enormous 'Megastore' (*see the picture in the next page*, a shop which sells items solely pertaining to the club) which measures over 500m²; a museum

fans pay to enter which contains a vast array of things to see and which also takes visitors to the pitch and the changing rooms; restaurants (with eighteen working kitchens) for the



catering side; fans can get married and immortalise the greatest day of their lives with Old Trafford as a backdrop; and for those who wish to experience the anticipation that players feel in the tunnel that leads to the pitch, fans can do so, with a recorded roar of the crowd playing in the background.

On non-match days Old Trafford becomes a point of reference, north-west England's most successful tourist attraction, which attracted 200,000 visitors in 2004; a heavily-used multinational company based on football. The importance of owning the stadium is well-understood by Palermo's new management and plans to carry this out have already been proposed. This would allow Palermo to come closer to the €55m that Manchester earns from every spectator per match (Chelsea leads this statistic at €72m), while today Palermo draws in on average almost €15 from every presence in the stadium.

3. EXPLANATION OF METHODOLOGY

In order to verify the theoretical hypothesis, this work has been carried out in two phases, one being accumulative and the second being based on field

research.

The subject was confronted firstly in a more general manner, focussing on the sector within its frame of reference, thus developing the analytical-strategic and operational sectors of current clubs, examining in depth the source of expenses, revenue and funding such as the stock market and other ventures of this nature. Therefore, the tendencies of the demand have been examined, what the supply offers and could offer, what the competition is and how it develops and progresses; throwing a last glance at the particular spheres of communication and merchandising before applying it to the two cases in question, Manchester United PLC and U.S. Città di Palermo. In the last paragraph of the fourth chapter, a series of indications are provided, which emerge from the approach taken in the two case studies, while in the conclusions, points are suggested as a possible “prescription” for the ills of the best loved sport in the world.

In the first three chapters, introduction and conclusions, an acknowledgement of existing literature on the subject has been made. The work technique was structured around bibliographical references whereas the substantial list of newspapers and websites consulted took the forefront so as to give the most up-to-date information possible in a rapidly changing sector such as that of the football business.

This work has followed both a general and a more particular method, from the observation of the “footballing phenomenon” to the management of the clubs (chap. 1), to aspects tied to sectorial business such as supply and demand,

competition, environment and governing (chap. 2), to retail in chapter three in which the resources of merchandising and communication were dealt with, and finally the case study in chapter four.

The comparative analysis made between Manchester United PLC and U.S. Città di Palermo did not, as aforementioned, intend to highlight the differences between the two actualities, a paragon between which would be impossible for a long list of historical, economical and cultural reasons. The intention of this study is rather to shed light upon on the management policies of a healthy model of company and sports management recognised all over the world, in the hope of suggesting possibly unfulfilled, or partially unfulfilled opportunities as regards an emerging actuality like that of the Sicilian team.

In order to draw together the two case studies, at the outset, the research tool created by Professor Bill Gerrard from the University of Leeds was used to find reasons for the long-lasting competitive advantage of Manchester United in England. According to the British academic, the performance of a club of any level depends upon four strategic resources (quality of play, coach management, size of the fanbase and general management) and the data collected and published by Gerrard has been updated and measured against that of U.S. Città di Palermo, on which research on the very same sporting, economic and marketing aspects was carried out.

All of the fieldwork was accomplished with non-structured interviews carried out with the management of both the English and Sicilian clubs in

person, over the phone, and also via email. It was also reinforced using statistics and data obtained from official documents such as Annual Reports from the English team and balance sheets from the Italian team. Where no information was available in the shape of certified documentation, the data was retrieved from newspaper articles and press clippings (for example, in May 2005, Manchester United was privatised, and becoming property of Glazer, it was not possible to obtain data regarding the accounts.).

Finally, a market potential and an estimate of the losses of U.S. Città di Palermo regarding the counterfeit market were elaborated, thanks to a secondary research on statistical sources derived from newspapers, and information received first-hand from the Regione Sicilia (Sicilian Council) and from the Guardia di Finanza (financial wing of the Italian police). The section regarding fans of the Sicilian team living abroad was expanded by performing a qualitative research which allowed us to understand the phenomenology of first- and second-generation Sicilian immigrants' behaviour, the focus of our investigation. This part was carried out with the help of newspaper articles and personal interviews from the Italian-American community of Brooklyn, New York.

4. CONCLUSIONS

These undertakings, embarked upon some fifteen years ago, from the long observational work carried out over many months on the most important

aspects of the international football business to the search for confirmation of the original ideas, led to the notion that they were, or rather *had to* be applicable to the more local and emerging Palermo. The impact of company diversification activities introduced by Manchester United (the benchmark examined), and by the other top clubs of the day, indicates that the sun has set on the era of the patron/president who fills in the balance sheet holes at the end of the season, and that effective strategies and the implementation of marketing tendency are vital in the running of the club. As an ideal final point, the subdivision of the three principle sources of revenue were identified (exploitation of media rights, the commercial sector, and takings from the public at the stadium) divided equally: 33%, 33%, 33%. In this way, comprehending the results on the pitch as far as possible becomes easier to achieve, insofar as it is possible for a football team to move away totally from its primary product, that is games and victories. This has taken place in Manchester over the past few years and the golden era, which finished with the experience on the stock market, demonstrates how investors from all over the world knew how to reward a winning management both “on and off the pitch”.

As with all Italian clubs that depend excessively upon the exploitation of media rights in terms of revenue, Palermo is incapable of competing with the rest of Europe as far as takings at the turnstile go. As we have seen, this can be blamed on stadiums being unsuitable for modern football needs and only open one day a fortnight. The blame can be given to the fact that Italy, unlike Great Britain, is a non-merchandising orientated culture, but also that the

organisation has this number of undeveloped strategic resources in comparison to teams in Great Britain and other European countries. The industrialisation discussed in the hypotheses is also achieved through the creation of a business which is not entirely based on the match itself, although everything is linked to that fundamental aspect. In Palermo's case, our estimation, which is summarised in the table below, has identified a distinct presence of "pink and black" devotees abroad which range from 457,000 to 470,000 people, suggesting that there is a heritage of solid passion which needs to be cultivated, nurtured and made use of as an essential resource.

Palermo's fanbase

World spread of Palermo supporters	1.337.041/1.349.164
Palermo supporters in Italy*	879.964
Palermo fan base abroad**	457.077/469.200
Market penetration U.S. Città di Palermo among Sicilians in Italy and in the world	11,43%
Market penetration U.S. Città di Palermo among Sicilians in Italy, except those from Messina and Catania***	12,9%
Market penetration U.S. Città di Palermo into Sicilian football fans, except those from Messina and Catania***	26,93%
Percentage Palermo supporters on total of Italian football fans	3,16%

*** Messina and Catania fans are traditionally hostile to Palermo's ones

Source: Our estimate on data items of Carat Sport (2004)* and Regione Sicilia (2005)**

The percentages of market penetration of the Sicilian and Italian fans (as shown in the table below) shows which complications the pink and black team must focus on today in order to grow.

The facilities at the stadium (following the creation or acquisition of the arena) is another large undertaking that the Sicilian club has ahead is to boost the profit area. Safety, comfort, family-friendly facilities, refreshments, parking facilities and suitable transport. All of this must make the public want to go to the stadium in order to spend their ‘entertainment money’, money that is spent on recreation, preferably choosing the soccer field rather than the cinema, TV, theatre or concerts.

Today, Palermo is hitting well below the mark in the fight to increase recognition of the brand name, an aspect which has a lot of potential. In marketing terms, in the hunt for a resource which the pink and blacks could benefit from over others, the team colours were highlighted as a club characteristic. Pink is the colour for which the Sicilian club is exclusively synonymous and by which it is recognised among football fans worldwide. For this reason, the suggestion to patent this particular colour and to incorporate it in the name ‘*Pink Power*’ was put forward as part of the work pertaining to Palermo. As far as merchandising is concerned, two solutions which could be of use for a situation such as that of the islanders have been presented: over and above the remunerative licensing contracts with

companies to which the use of the logo is conceded in exchange for abundant royalties, in the cases of Southampton and Bilbao (not by chance clubs of lower status, but also due to the fact that the Basque fans are strongly loyal to their local team, similar to Palermo's case) companies have been set up *ad hoc* for the exploitation of the brand. The sale of sporting material (and also the rest of the merchandising) is not delegated to any multinational clothing company but dealt with and sold by the club itself (*see above an image of Southampton kit*). A gamble on their own capabilities and on the fans' attachment to the club, which doesn't line the pockets of outside companies and if the estimated number of fans in Italy contributed in the previously hypothesised way, the returns for Palermo in this sector would go way beyond the amount accumulated through coach sponsor.

All these activities have certain advantages, hypothesised at the beginning and demonstrated in the course of the project: a sporting team which functions, exactly because of the particular characteristics of their clientele in that they *support* the club and don't just buy items or services from it, can't limit itself to offer just the match or to sell gadgets, but it must become a point of reference and an example of the development of strong, widely-ranged economic interests. The model of Manchester United is the example of a club which educates youngsters while still in school, employs people in collaboration with the other citizens'



institutions (which Manchester United has, in turn, become), helps people in financial and social difficulty, in its partnership with Unicef is dedicated to charity all around the world, and even deals with environmental issues by taking part in waste disposal programmes and finally, that which doesn't hurt in being a company – it makes a *lot* of money. There are other examples of 'community based' top level teams in Spain: Barcellona and Real Madrid. Their management system could also offer possible solutions to the people's disaffection and to the decline in stadium turnout. In our opinion, the example of the 'team in the hands of everyone', as the president of the Spanish capital's team explained, referring to his own club - which is not one of the most dedicated to marketing on the international field simply by chance, is winning. In England there are seven clubs run by the fans, in another twenty three the fans nominate the management through communal *running* which, today, is the exception, but which *should* become the rule because in no other commercial sector do clients participate in such a way as to have a hand in the running of the product or service they make use of. Football matches are a show like any other, but also a social phenomenon.

So,generally speaking, how the football industry manages to become profitable, developing the enormous flux of money which flows within it, is another question. Our research shows that in order to survive, a correct competition between the teams has to be maintained, restricting the power of the parties concerned and entrusting the direction to the central institutions (federations and leagues). On top of everything, the phenomenon of violence

connected to football must be overcome (the exploitation of facilities in stadiums in Great Britain began when the hooligans were marginalised), while as far as the management of the clubs is concerned, a salary cap linked to performance and turnover; adequate match prices, relative to other entertainment services, should be fixed and linked to the financial capacities of the public to which it concerns; the balance sheets should be rigidly checked; the production amply diversified, and all by the management in tune with modern football.

In conclusion, it seems to us that the future of football is in front of its nose in the very essence of its game and in the adherence to the seventeen simple rules which helped it become the best-loved sport in the world.

INDEX OF UNABRIDGED THESIS

INTRODUCTION	6
I. SPORT AND BUSINESS IN FOOTBALL CLUBS	16
I.1 Sector Placement	16
I.2 Football Clubs' Economic Situation	22
I.2.1 Profits	29
I.2.1.1 Media Rights	29
I.2.1.2 Match Revenues	32
I.2.1.3 Commercial Activity	35
I.2.1.4 Internationalisation of Markets	38
I.2.2. Costs and Investments	41
I.2.3. The Stock Market	46
I.2.3.1 Securitization	52
I.2.4 The Balance Sheet	54
II. MARKETING WITHIN FOOTBALL CLUBS	55
II.1 Demand analyses	59
II.1.1 The Fans	62
II.1.2 The Fanatics	65
II.1.3 The Followers	69
II.1.4 Segmentation Strategies	70
II.1.4.1 Customer Relationship Management	76
II.1.5 Sponsors	79
II.1.5.1 Commercial Sponsors	82
II.1.5.2. Jersey Sponsors	92
II.2.1 Primary Offer	95
II.2.2 Secondary Offer	96
II.2.2.1 The Stadium	98
II.2.2.2 Brand Names	103
II.2.3 Competition	109
II.2.3.1 Direct Competition	110
II.2.3.2 Indirect Competition	111
II.2.3.3 Amplified Competition, Entertainment	112
II.2.3.4 Checking	117
II.2.4 Analyses of Internal and External Marketing Environment	119
II.3 The 4 Ps: Peculiarities of Football Clubs	121
II.3.1 The Product	121
II.3.1.1 The Stadium	124
II.3.1.2 Security and Choreography, the “pro-sumer”	125
II.3.2 Distribution	128
II.3.3 Pricing	132
II.3.4 Promotion	135
II.4 Leading, Competitive and Local Club Strategies	137
III. FOOTBALL CLUB MERCHANDISING AND COMMUNICATION ...	142

III.1 Use of Strategic resources	142
III.2 Merchandising and Licensing	145
III.3 The Brand	154
III.4 Communication.....	164
III.4.1 Internal Communication.....	168
III.4.2 External Communication.....	170
III.4.2.1 Media and Public Relations	170
III.4.2.2 Advertising.....	176
III.4.2.3 Internet and Direct Marketing.....	183
III.4.2.4 Other organs within the Club	189
IV. TWO CONFRONTING CASES:	
MANCHESTER UNITED PLC AND U.S. CITTÀ DI PALERMO	191
IV.1 Introduction	191
IV.2 A Comparative Method	196
IV.2.1 Playing Resources	198
IV.2.1.1 Manchester Utd.....	198
IV.2.2 Coaching Management.....	203
IV.2.2.1 Manchester Utd.....	203
IV.2.2.2 Palermo	204
IV.2.3 Allegiance resources	205
IV.2.3.1 Manchester Utd.....	205
IV.2.3.2 Palermo	206
IV.2.4 Managerial resources.....	207
IV.2.4.1 Manchester Utd.....	207
IV.2.4.2 Palermo	211
IV.3. Match Day Revenue	215
IV.3.1 Manchester United	215
IV.3.2 Palermo	218
IV.4. Media Rights	221
IV.4.1 Manchester Utd	221
IV.4.2 Palermo	222
IV.5 Commercial and Brand-Related Activity	224
IV.5.1 Manchester Utd	224
IV.5.1.1 Brand United.....	230
IV.5.1.2 The Agreement with Nike.....	234
IV.5.1.3 MU Global	239
IV.5.1.4 Corporate United Image.....	243
IV.5.2 Palermo	246
IV.5.2.1 Sponsorship, Merchandising and Communication	247
IV.5.2.2 Palermo Fans in Italy and Worldwide	262
IV.5.2.3 The Third Way.....	272
IV.6 Guidelines from the Benchmark	273
CONCLUSIONS.....	280
1. Crisis points	282
2. Virtual Football.....	287

3. The Ethical Question	290
4. Management Standards.....	292
5. The Future.....	295
KEY TO ABBREVIATIONS	303
INDEX OF FIGURES	305
INDEX OF TABLES	307
BIBLIOGRAPHY	308
LIST OF NEWSPAPERS CONSULTED	311
LIST OF WEBSITES CONSULTED.....	321

INDEX OF FIGURES

Figure I.1 Serie A Spectators per geographical area.....	21
Figure I.2 Classification of revenue for football clubs	25
Figure I.3 Major European tournaments' revenue.....	26
Figure I.4 Takings and average stadium turnout per club	33
Figure I.5 Takings and average stadium turnout per championship	34
Figure I.6 Returns from commercial activity.....	36
Figure I.7 Player salaries in major European tournaments	42
Figure I.8 Stock Market prices 2002-2005	48
Figure I.9 Major European tournament income/outgoings balance 2003/04.....	54
Figure II.1 Main sporting club markets	59
Figure II.2 People's demand for sport	61
Figure II.3 Palermo's 'Curva Nord' (diehard fans)	66
Figure II.4 Inter Milan's 'Curva Nord' (diehard fans).....	66
Figure II.5 Manchester Utd's fanbase world segmentation	72
Figure II.6 Average returns per spectator per match.....	74
Figure II.7 A football club's development standard	97
Figure II.8 Product extension of a sporting club.....	97
Figure II.9 Computer simulated Emirates Stadium	101
Figure II.10 A football club's development levels	138
Figure II.11 Characteristics of a club's development levels	139
Figure III.1 Fundamental categories of brand equity.....	162
Figure III.2 Sporting clubs' communication targets	165
Figure III.3 Juventus' season ticket advertising campaign 1997/98.....	177
Figures III.4 to III.6 Fabio Cannavaro & Nike	178
Figure III.7 Zinedine Zidane & Adidas	178
Figure III.8 Alex Del Piero & Adidas.....	178
Figure III.9 Ronaldo & Siemens	178
Figure III.10 Beckham cartoon	179
Figure III.11 An 'English' Lazio	180

Figure III.12 Atletico Madrid's <i>Añito en le infierno</i>	182
Figure III.13 Inter Milan's website home page.....	185
Figure III.14 Real Madrid's website home page.....	186
Figure IV.1 Manchester United's ascension to glory	198
Figure IV.2 U.S. Città di Palermo flowchart	212
Figures IV.3 and IV.4 The Megastore at Old Trafford.....	236
Figure IV.5 Forza Palermo Card.....	249
Figure IV.6 On line shop advertising U.S. Città di Palermo	250
Figure IV.7 U.S. Città di Palermo's Merchandising.....	254
Figure IV.8 Southampton kit	273

INDEX OF TABLES

Table I.1 Effect of Super Bowl on host cities	18
Table I.2 Champions League terrestrial audience 2004/05, group phase	19
Table I.3 Sports practice in Italy	22
Table I.4 Media rights for top clubs.....	31
Table I.5 Main sponsors, 2004/05 season	37
Table I.6 Opportunities and risks of stock market quotation.....	51
Table II.1 Characteristics of sporting clubs' markets	60
Table II.2 Education level of sporting public	64
Table II.3 Manchester United's fanbase	72
Table II.4 Combinations of sponsorship between companies and sporting clubs	85
Table II.5 Annual returns from jersey sponsors.....	94
Table II.6 European club brand values 2004	105
Table II.7 Incomes of shows in Italy (2002).....	114
Table II.8 Incomes of sport in Italy (2002).....	115
Table II.9 Incomes of shows in Italy from 1950 to '95	116
Table II.10 Incomes of sport in Italy (1995).....	116
Table II.11 Football clubs' governance	118
Table II.12 Promotional tools available to companies.....	135
Table IV.1 Historical sporting performance of Man Utd and Palermo.....	192
Table IV.2 Home-grown starting league appearances in MU and Palermo	200
Table IV.3 Manchester United PLC Group	208
Table IV.4 Financial performance of Manchester Utd and Palermo	213
Table IV.5 Counterfeiting U.S. Città di Palermo brand, 2004.....	256
Table IV.6 U.S. Città di Palermo fanbase in Italy	263
Table IV.7 U.S. Città di Palermo fanbase worldwide.....	265
Table IV.8 Sicilian associations abroad.....	266

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