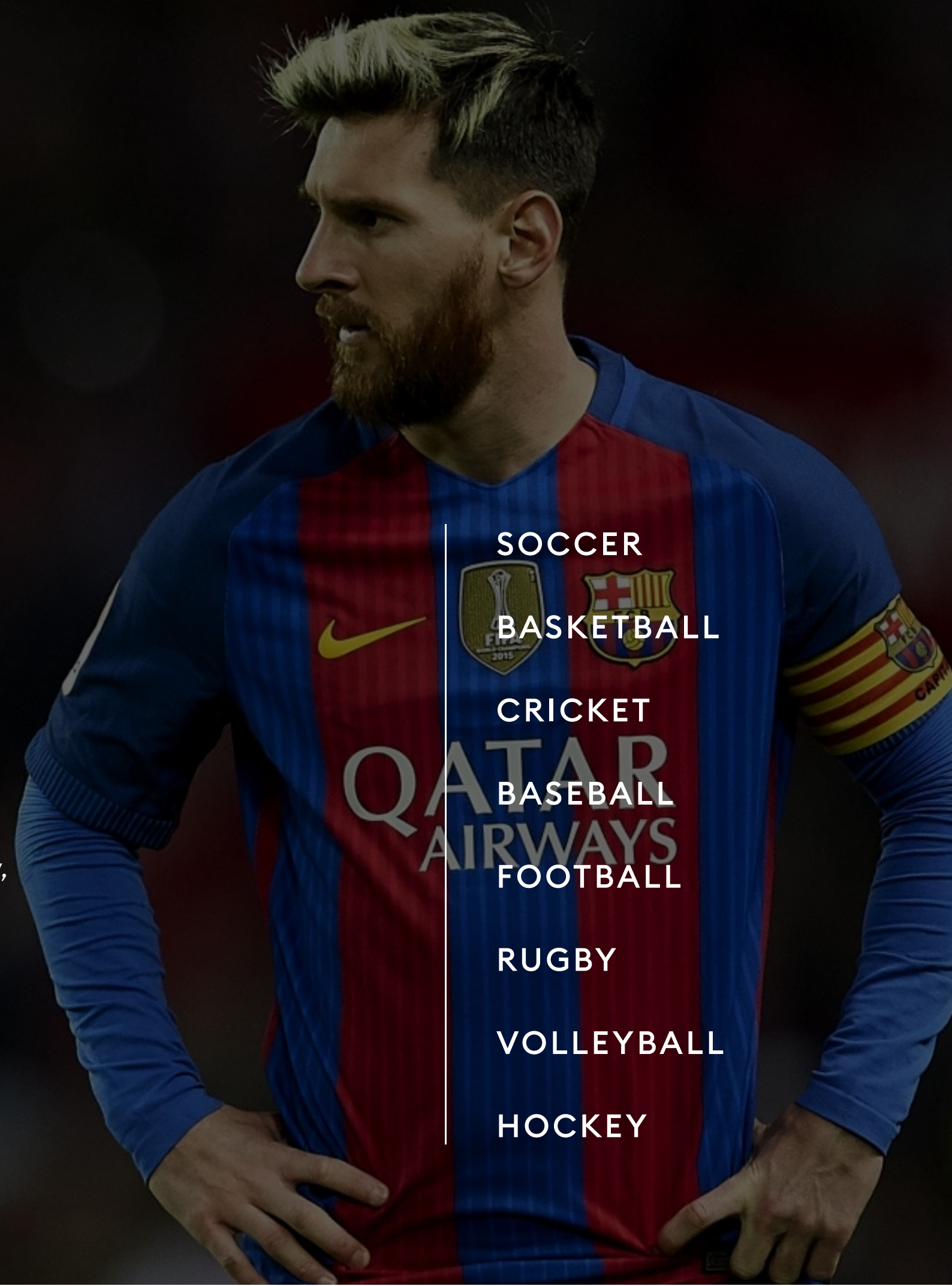


SPORTS DYNAMICS

MARKET REPORT

We believe in the power of sport to mobilise fans (and fan behaviour). A well-executed rewards programme can play a central role in an organisation's overall growth strategy, particularly as every touchpoint with a fan represents an opportunity to reward them which will drive further value to the club, to fans and to sponsors.



SOCCER

BASKETBALL

CRICKET

BASEBALL

FOOTBALL

RUGBY

VOLLEYBALL

HOCKEY

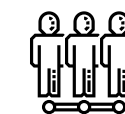
UNITED KINGDOM

SPORTS
DYNAMICS

The United Kingdom has the world's fifth-largest economy by nominal gross domestic product (GDP), and the ninth-largest by purchasing power parity (PPP). It has a high-income economy and a very high human development index rating, ranking 13th in the world.

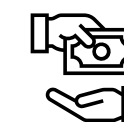
MARKET POTENTIAL

Sport in the United Kingdom plays an important role in British culture. The United Kingdom has given birth to a large majority of the team sports including association football, badminton, billiards, bowls, boxing, British baseball, rounders, cricket, croquet, curling, darts, golf, fives, field hockey, netball, rugby (union and league), tennis, table tennis, snooker, Motorcycle Speedway, squash, water polo, and shinty.



POPULATION

66,7M



PURCHASING POWER

\$36K



MOST POPULAR SPORT

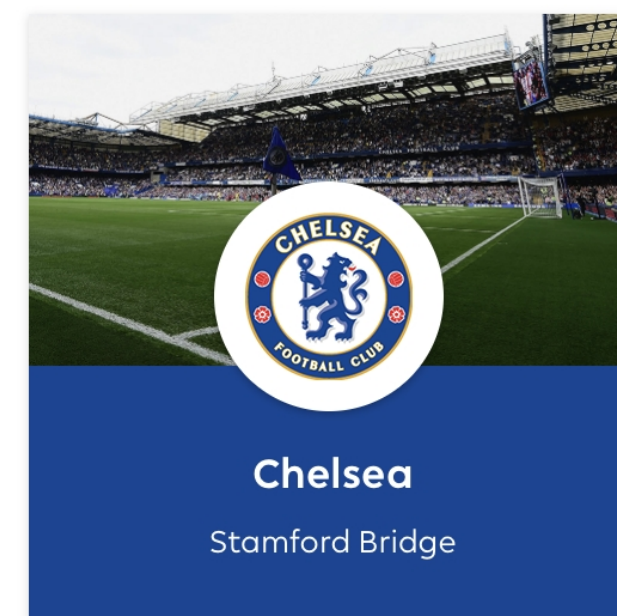
SOCCER



PREMIERE LEAGUE

Estimated domestic fan base
25-40M people

 Nottingham Forest	 Hull City	 Burnley	 Arsenal	 Swansea City
 Oldham Athletic	 Ipswich Town	 Cardiff City	 Aston Villa	 Swindon Town
 Portsmouth	 Leeds United	 Charlton Athletic	 Barnsley	 Tottenham Hotspur
 Queens Park Rangers	 Leicester City	 Chelsea	 Birmingham City	 Watford
 Reading	 Liverpool	 Coventry City	 Blackburn Rovers	 West Bromwich Albion
 Sheffield United	 Manchester City	 Crystal Palace	 Blackpool	 West Ham United
 Sheffield Wednesday	 Manchester United	 Derby County	 Bolton Wanderers	 Wigan Athletic
 Southampton	 Middlesbrough	 Everton	 AFC Bournemouth	 Wimbledon
 Stoke City	 Newcastle United	 Fulham	 Bradford City	 Wolverhampton Wanderers
 Sunderland	 Norwich City	 Huddersfield Town	 Brighton and Hove Albion	





Crystal Palace
Selhurst Park



Everton
Goodison Park



Fulham
Craven Cottage



Leeds United
Elland Road



Leicester City
King Power Stadium



Liverpool
Anfield



Manchester City
Etihad Stadium



Manchester United
Old Trafford



Newcastle United
St. James' Park



Sheffield United
Bramall Lane



Southampton
St. Mary's Stadium



Tottenham Hotspur
Tottenham Hotspur Stadium



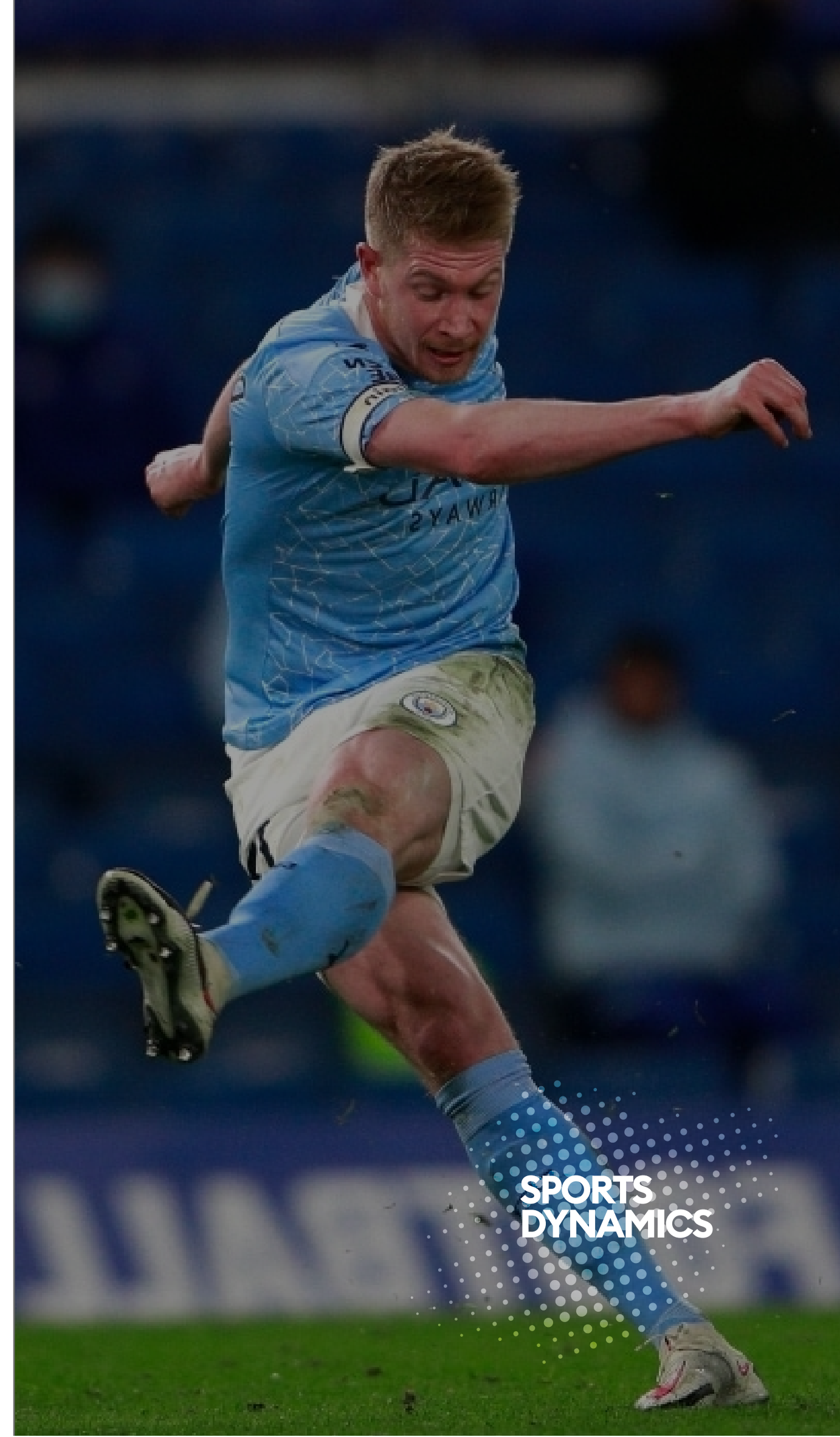
West Bromwich Albion
The Hawthorns



West Ham United
London Stadium



Wolverhampton Wanderers
Molineux Stadium

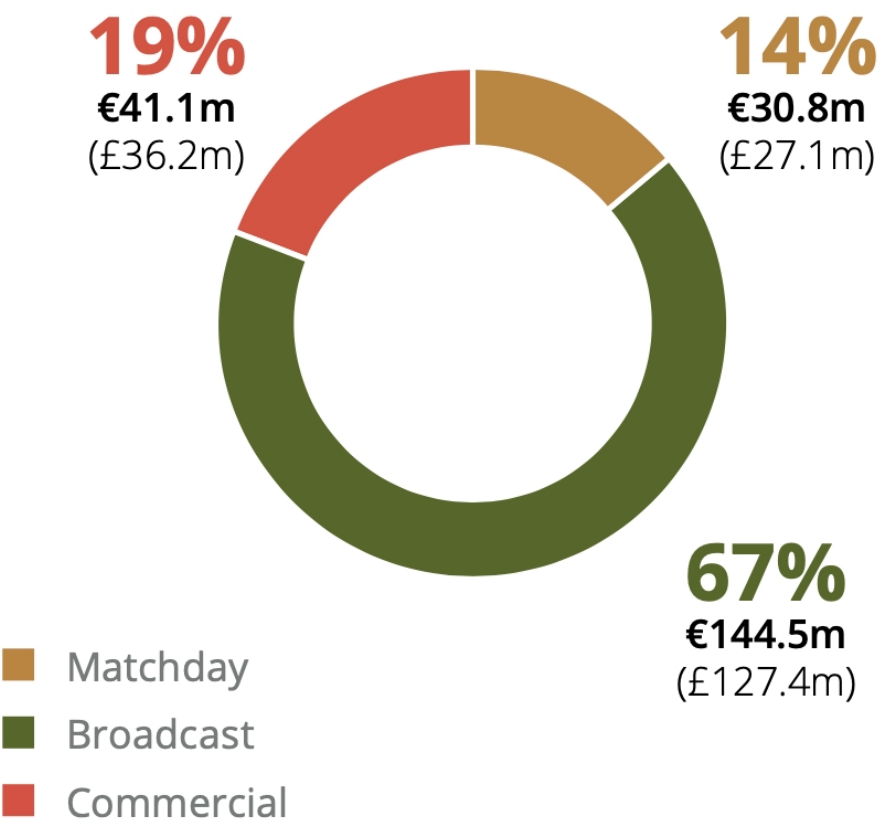
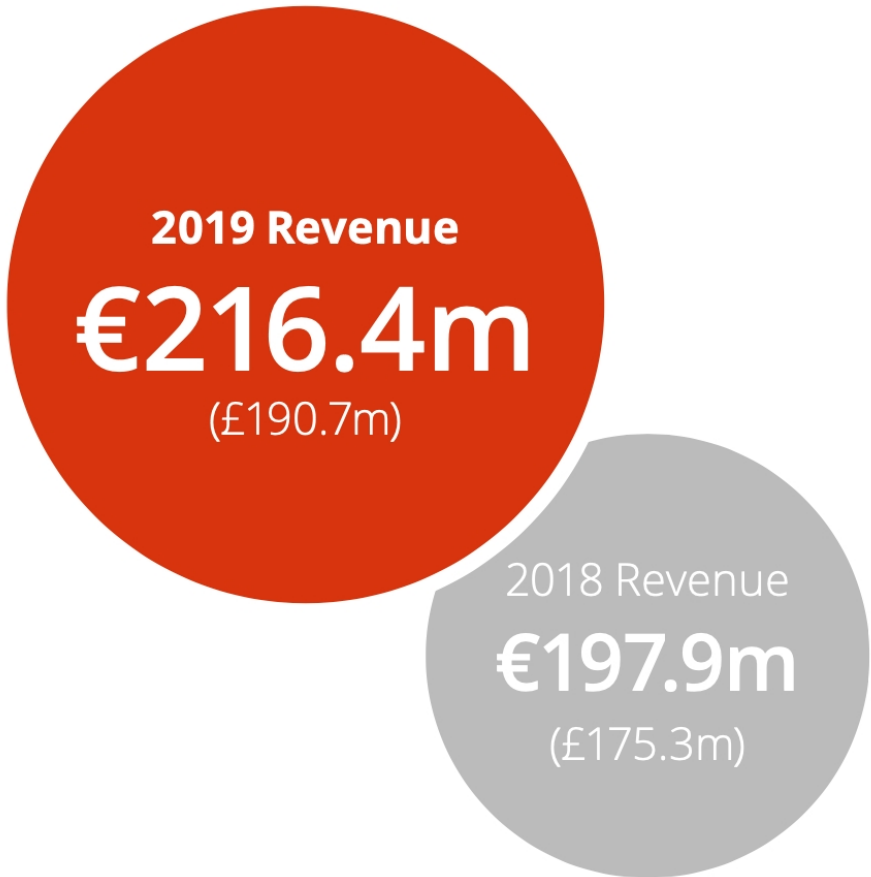


CASE STUDY



Official Principia Sponsor for West Ham United

WEST HAM UNITED



Most clubs in premiere leagues in developed countries have 2-3 million fans in their domestic fan base. By conservative estimates, monetizing just one such team with one third of their fan base, we can re-direct \$10B worth of disposable income annually. At an average 3% commission Sports Dynamics can generate over \$300 million of revenue for a club annually.

UNTAPPED POTENTIAL

€200M+

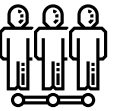


UNITED STATES

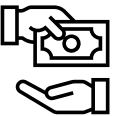
The United States is a highly developed country, and continuously ranks high in measures of socioeconomic performance. It accounts for approximately a quarter of global GDP and is the world's largest economy by GDP at market exchange rates.

MARKET POTENTIAL

Based on revenue, the four major professional sports leagues in the United States are Major League Baseball (MLB), the National Basketball Association (NBA), the National Football League (NFL), and the National Hockey League (NHL). The market for professional sports in the United States is roughly \$69 billion, roughly 50% larger than that of all of Europe, the Middle East, and Africa combined



POPULATION
329M



PURCHASING POWER
\$65K



MOST POPULAR SPORTS
FOOTBALL, BASKETBALL,
BASEBALL, HOCKEY

SPORTS DYNAMICS



NATIONAL FOOTBALL LEAGUE

Estimated domestic fan base
50-90M people



[Arizona Cardinals](#)



[Atlanta Falcons](#)



[Baltimore Ravens](#)



[Buffalo Bills](#)



[Carolina Panthers](#)



[Chicago Bears](#)



[Cincinnati Bengals](#)



[Cleveland Browns](#)



[Dallas Cowboys](#)



[Denver Broncos](#)



[Detroit Lions](#)



[Green Bay Packers](#)



[Houston Texans](#)



[Indianapolis Colts](#)



[Jacksonville Jaguars](#)



[Kansas City Chiefs](#)



[Los Angeles Chargers](#)



[Los Angeles Rams](#)



[Miami Dolphins](#)



[Minnesota Vikings](#)



[New England Patriots](#)



[New Orleans Saints](#)



[New York Giants](#)



[New York Jets](#)



[Oakland Raiders](#)



[Philadelphia Eagles](#)



[Pittsburgh Steelers](#)



[San Francisco 49ers](#)



[Seattle Seahawks](#)



[Tampa Bay Buccaneers](#)



[Tennessee Titans](#)



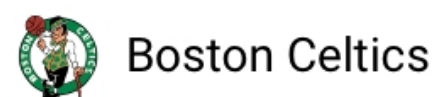
[Washington Redskins](#)



NATIONAL BASKETBALL ASSOCIATION

Estimated domestic fan base
60-70M people

ATLANTIC



Boston Celtics



Brooklyn Nets



New York Knicks



Philadelphia 76ers



Toronto Raptors

CENTRAL



Chicago Bulls



Cleveland Cavaliers



Detroit Pistons



Indiana Pacers



Milwaukee Bucks

SOUTHEAST



Atlanta Hawks



Charlotte Hornets



Miami Heat



Orlando Magic



Washington Wizards

NORTHWEST



Denver Nuggets



Minnesota Timberwolves



Oklahoma City Thunder



Portland Trail Blazers



Utah Jazz

PACIFIC



Golden State Warriors



LA Clippers



Los Angeles Lakers



Phoenix Suns



Sacramento Kings

SOUTHWEST



Dallas Mavericks



Houston Rockets



Memphis Grizzlies



New Orleans Pelicans



San Antonio Spurs

**SPORTS
DYNAMICS**



NATIONAL HOCKEY LEAGUE

Estimated domestic fan base
25-30M people

MASSMUTUAL EAST

- Boston
- Buffalo
- New Jersey
- NY Islanders
- NY Rangers
- Philadelphia
- Pittsburgh
- Washington

DISCOVER CENTRAL

- Carolina
- Chicago
- Columbus
- Dallas
- Detroit
- Florida
- Nashville
- Tampa Bay

HONDA WEST

- Anaheim
- Arizona
- Colorado
- Los Angeles
- Minnesota
- San Jose
- St. Louis
- Vegas

SCOTIA NORTH

- Calgary
- Edmonton
- Montréal
- Ottawa
- Toronto
- Vancouver
- Winnipeg



MAJOR LEAGUE BASEBALL

Estimated domestic fan base
50-60M people

AL EAST

 Baltimore Orioles

 Boston Red Sox

 New York Yankees

 Tampa Bay Rays

 Toronto Blue Jays

NL EAST

 Atlanta Braves

 Miami Marlins

 New York Mets

 Philadelphia Phillies

 Washington Nationals

AL CENTRAL

 Chicago White Sox

 Cleveland Indians

 Detroit Tigers

 Kansas City Royals

 Minnesota Twins

NL CENTRAL

 Chicago Cubs

 Cincinnati Reds

 Milwaukee Brewers

 Pittsburgh Pirates

 St. Louis Cardinals

AL WEST

 Houston Astros

 Los Angeles Angels

 Oakland Athletics

 Seattle Mariners

 Texas Rangers

NL WEST

 Arizona Diamondbacks

 Colorado Rockies

 Los Angeles Dodgers

 San Diego Padres

 San Francisco Giants

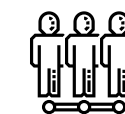
NEW ZEALAND

SPORTS
DYNAMICS

New Zealand has an advanced market economy, ranked 14th in the 2019 Human Development Index and third in the 2020 Index of Economic Freedom. It is a high-income economy.

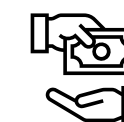
MARKET POTENTIAL

Rugby union is the national sport in New Zealand, and is popular across all sections of New Zealand society, and many New Zealanders associate it with their national identity. It has the largest spectator following of all sports in New Zealand. New Zealand's national rugby team, the All Blacks, has the best winning record of any national team in the world, and is currently ranked second in the world.



POPULATION

5.1M



PURCHASING POWER

\$42K



MOST POPULAR SPORT

RUGBY

SPORTS
DYNAMICS



SUPER RUGBY LEAGUE
Estimated domestic fan base
1.5M people



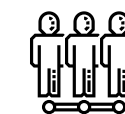
ITALY

SPORTS
DYNAMICS

Italy is considered to be one of the world's most culturally and economically advanced countries, with the world's eighth-largest economy by nominal GDP (third in the European Union), sixth-largest national wealth and third-largest central bank gold reserve. It ranks very high in life expectancy, quality of life, healthcare, and education.

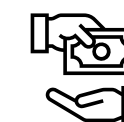
MARKET POTENTIAL

Football is the most popular sport in Italy. The Italy national football team has won the FIFA World Cup four times (1934, 1938, 1982, and 2006), trailing only Brazil (with 5) and level with Germany (with 4). Serie A clubs have seen success in the Champions League (formerly the European Cup), the premier European club competition, winning it twelve times.



POPULATION

60.3M



PURCHASING POWER

\$33K



MOST POPULAR SPORT

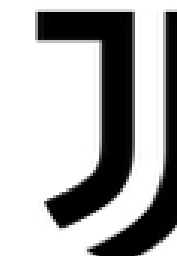
SOCCER

SPORTS DYNAMICS™



SERIE A

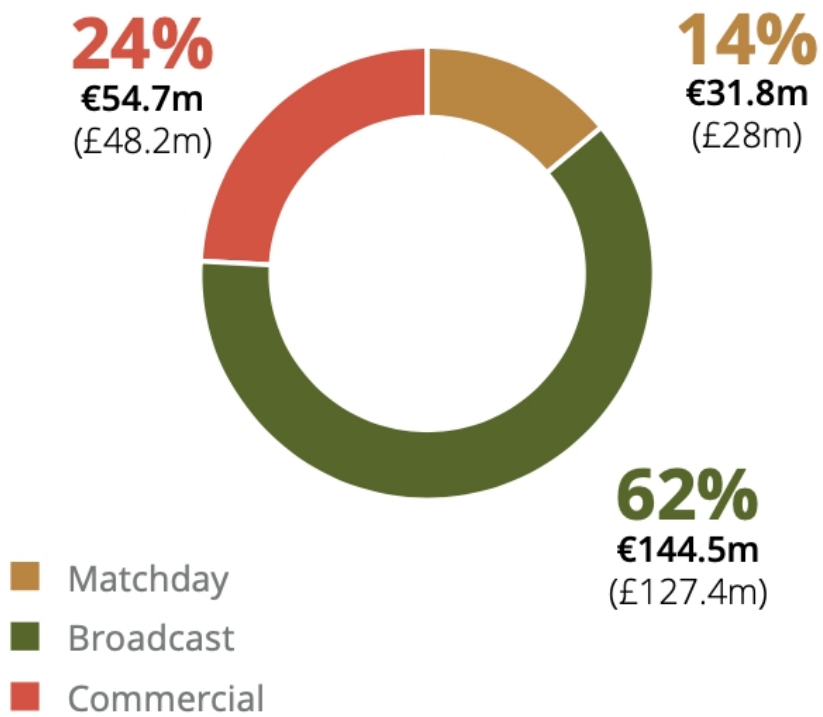
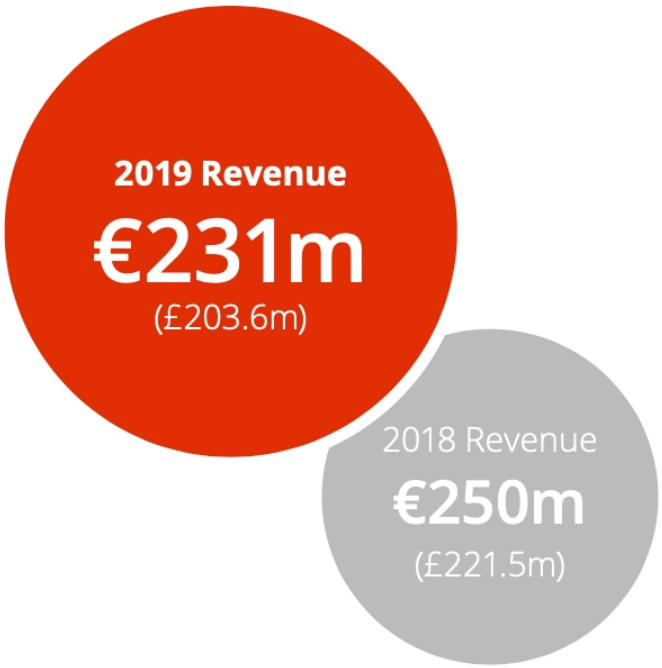
Estimated domestic fan base
30M-40M people



CASE STUDY



AS ROMA



AS ROMA has an estimated domestic fan base of between 3-5 million fans. By conservative estimates, monetizing just one such team with one third of their fan base, we can re-direct \$10B worth of disposable income annually. At an average 3% commission Sports Dynamics can generate over \$300 million of revenue for a club annually.

UNTAPPED POTENTIAL

€350M+

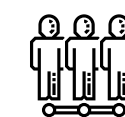
SPAIN

SPORTS
DYNAMICS

Spain is the largest country in Southern Europe, the second-largest country in Western Europe and the European Union, and the fourth-largest country by area on the European continent. It is a highly developed country[and a high income country, with the world's fourteenth-largest economy by nominal GDP and the sixteenth largest by PPP.

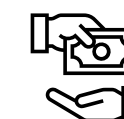
MARKET POTENTIAL

Football is the most popular sport in Spain. La Liga or Primera División (The Spanish League) is considered to be one of the world's best competitions. Successful teams in recent European competitions are Real Madrid, FC Barcelona, Sevilla, Athletic Bilbao, Valencia CF and Atlético Madrid. Real Madrid and Barcelona have dominated for much of their history, and created an intimate rivalry. Real Madrid has been dubbed by many pundits as the most successful club in the world, having won the UEFA Champions League a record 13 times, almost all other UEFA club competitions at least once, and La Liga a record 34 times.



POPULATION

47M



PURCHASING POWER

\$30K



MOST POPULAR SPORT

SOCCER



LaLiga

Estimated domestic fan base
20M-25M people



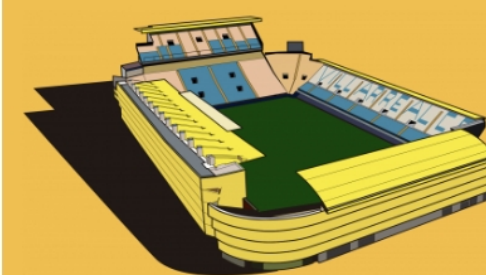
Valencia CF
Camp de Mestalla



Foundation 1919



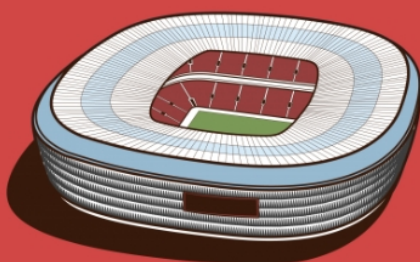
Villarreal CF
Estadio de la Cerámica



Foundation 1923



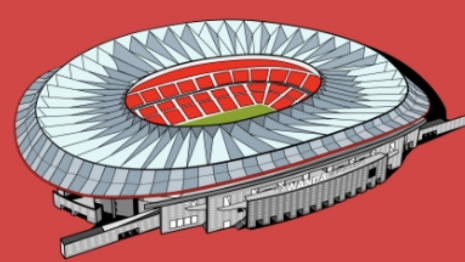
Athletic Club
Estadio San Mamés



Foundation 1898



Atlético de Madrid
Wanda Metropolitano



Foundation 1903



CA Osasuna
Estadio El Sadar



Foundation 1920



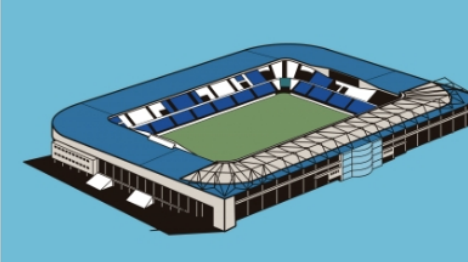
Cádiz CF
Ramón de Carranza



Foundation 1910



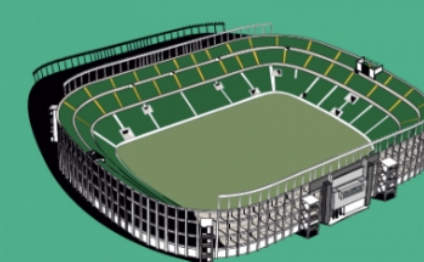
Deportivo Alavés
Mendizorroza



Foundation 1921



Elche CF
Estadio Martínez Valero

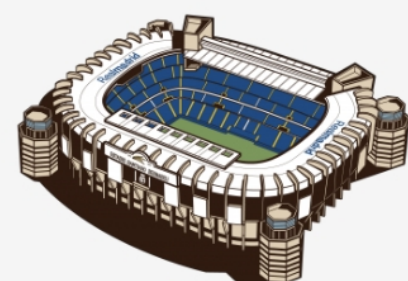


Foundation 1923



Real Madrid

Estadio Santiago Bernabéu

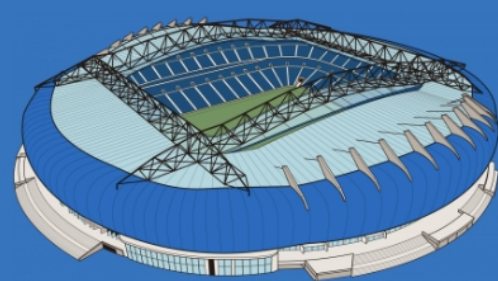


Foundation 1902



Real Sociedad

Reale Arena

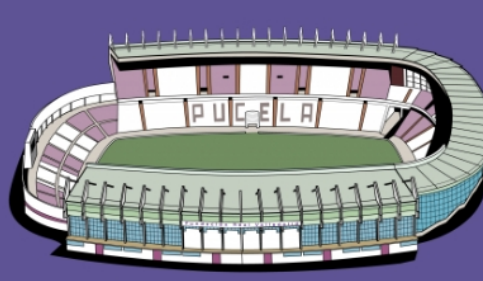


Foundation 1909



Real Valladolid CF

Estadio Municipal José Zorrilla

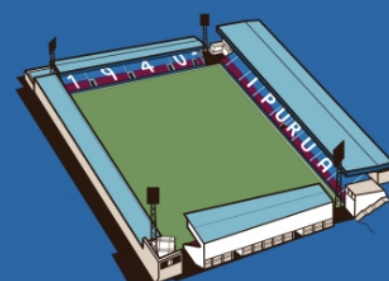


Foundation 1928



SD Eibar

Municipal de Ipurua

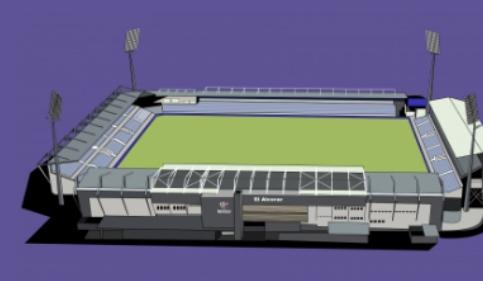


Foundation 1940



SD Huesca

El Alcoraz



Foundation 1960



Sevilla FC

Ramón Sánchez-Pizjuán



Foundation 1905



FC Barcelona

Camp Nou

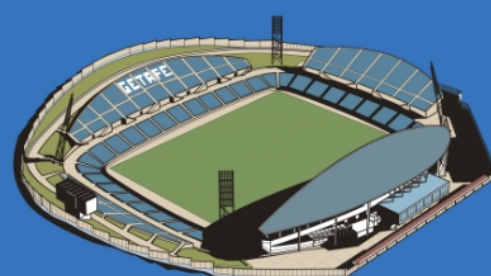


Foundation 1899



Getafe CF

Coliseum Alfonso Pérez

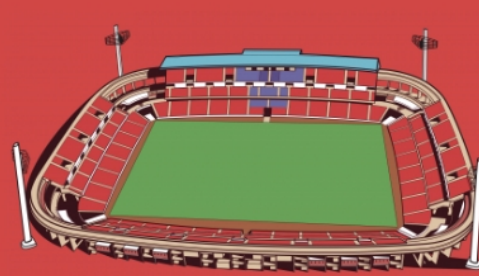


Foundation 1983



Granada CF

Nuevo Los Cármenes



Foundation 1931



Levante UD

Estadio Ciutat de València

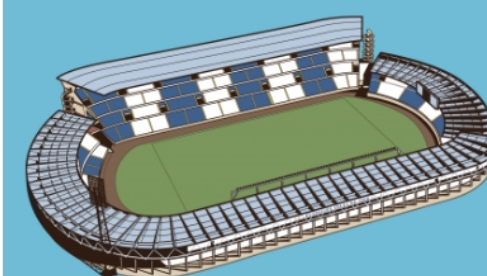


Foundation 1909



RC Celta

Estadio Abanca Balaídos



Foundation 1923



Real Betis

Estadio Benito Villamarín



Foundation 1907

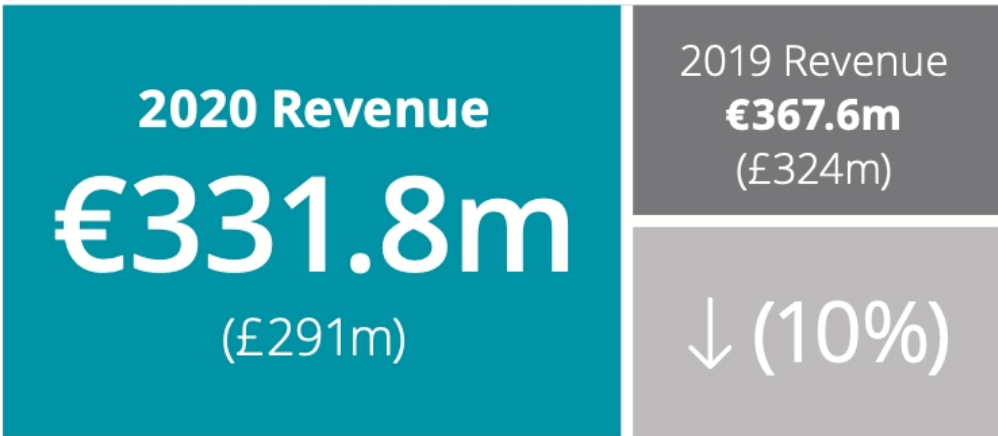
CASE STUDY



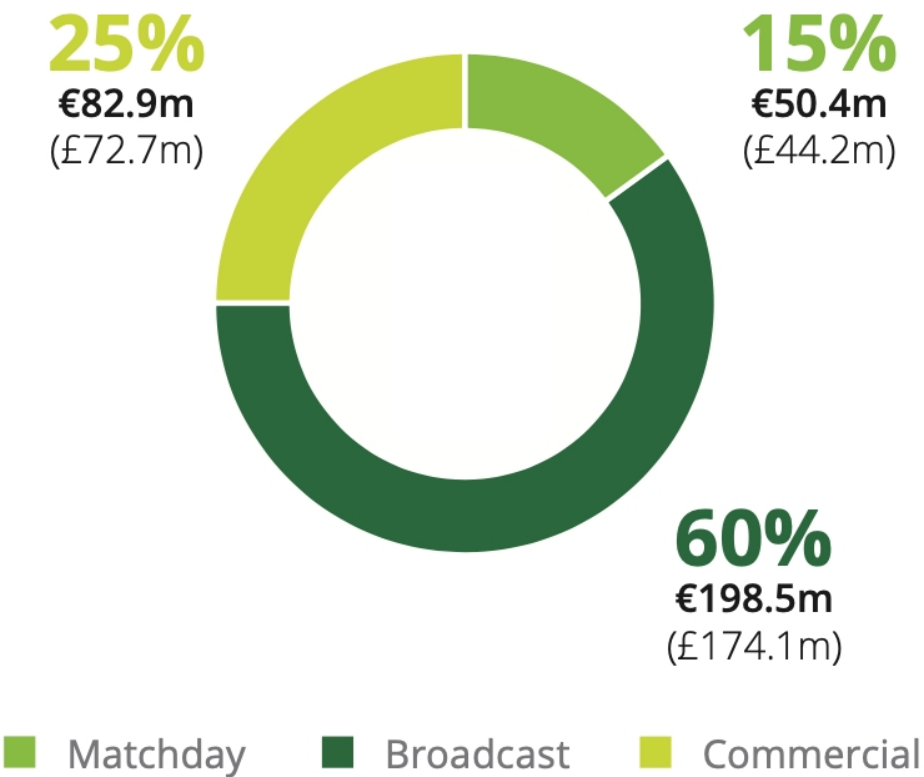
Average league
attendance*
57,098



**ATLETICO DE
MADRID**



Revenue profile 2020 (€m)



Most clubs in premiere leagues in developed countries have 2-3 million fans in their domestic fan base. By conservative estimates, monetizing just one such team with one third of their fan base, we can re-direct \$10B worth of disposable income annually. At an average 3% commission Sports Dynamics can generate over \$300 million of revenue for a club annually.

UNTAPPED POTENTIAL

€400M+

GERMANY

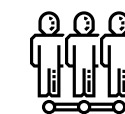
Germany is a great power with a strong economy; it has the largest economy in Europe, the world's fourth-largest economy by nominal GDP, and the fifth-largest by PPP.

SPORTS
DYNAMICS

MARKET POTENTIAL

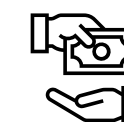
Football (soccer) is the most popular sport in Germany. With a total of 26,000 clubs and 178,000 teams the German football sport is financed by means of state funding and state contributions, voluntary service, private sponsors and membership fees.

Germany's top level football league, known as the Bundesliga, has the highest average attendances of any association football league in the world; among all professional sports leagues, its average attendance is second only to American football's NFL.



POPULATION

83M



PURCHASING POWER

\$46K



MOST POPULAR SPORT

SOCCER



Estimated domestic fan base
35M-40M people



FC Bayern München



RB Leipzig



VfL Wolfsburg



Eintracht Frankfurt



Bayer 04 Leverkusen



Borussia Dortmund



1. FC Union Berlin



Borussia Mönchengladbach



Sport-Club Freiburg



VfB Stuttgart



TSG Hoffenheim



SV Werder Bremen



FC Augsburg



1. FC Köln



Hertha Berlin



DSC Arminia Bielefeld



1. FSV Mainz 05

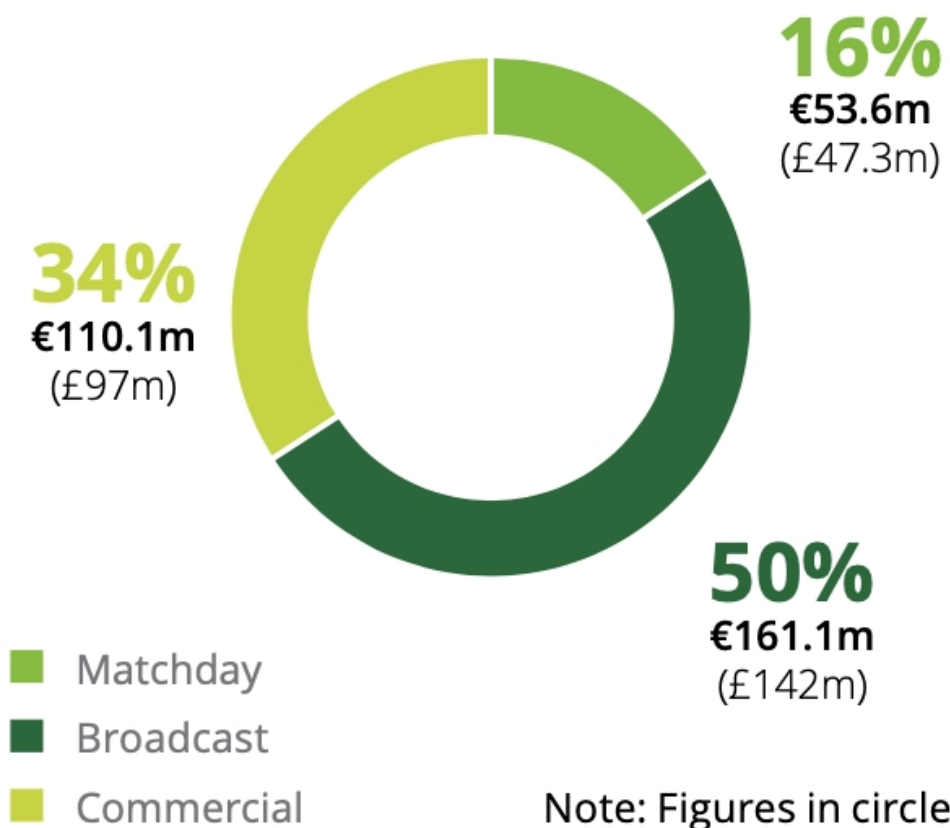
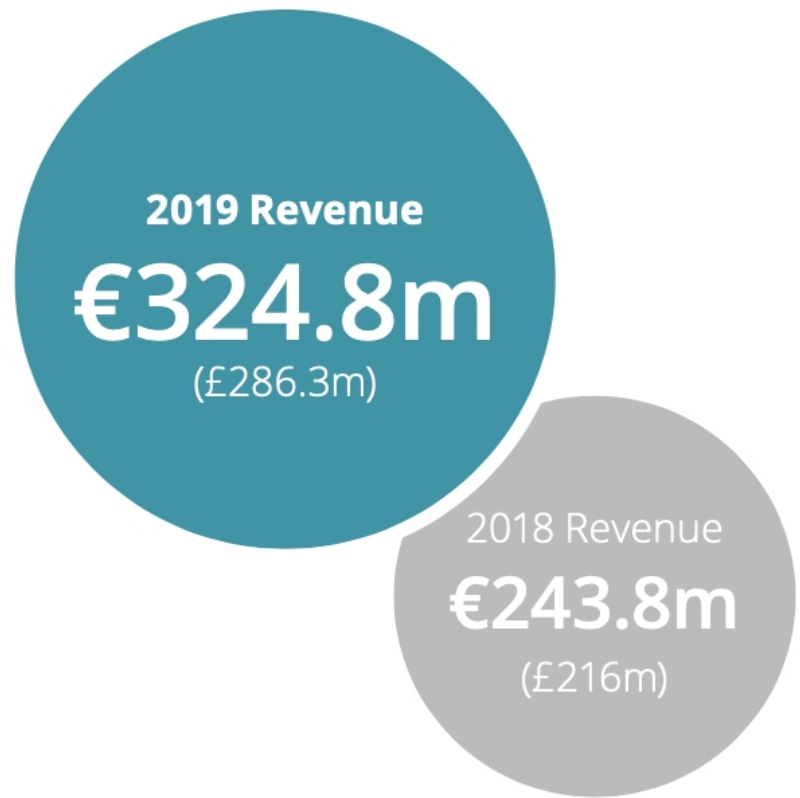


FC Schalke 04

CASE STUDY



SCHALKE 04



Note: Figures in circles show top 20 ranking per revenue stream.

Most clubs in premiere leagues in developed countries have 2-3 million fans in their domestic fan base. By conservative estimates, monetizing just one such team with one third of their fan base, we can re-direct \$10B worth of disposable income annually. At an average 3% commission Sports Dynamics can generate over \$300 million of revenue for a club annually.

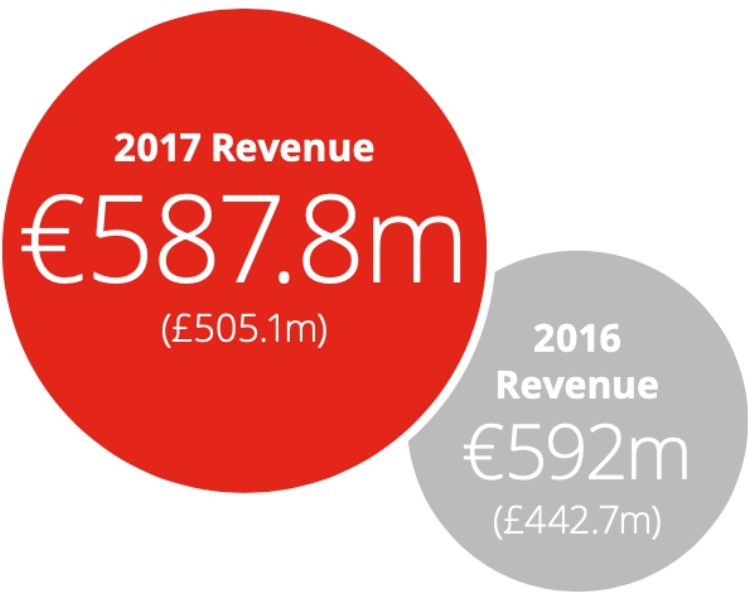
UNTAPPED POTENTIAL

€300M+

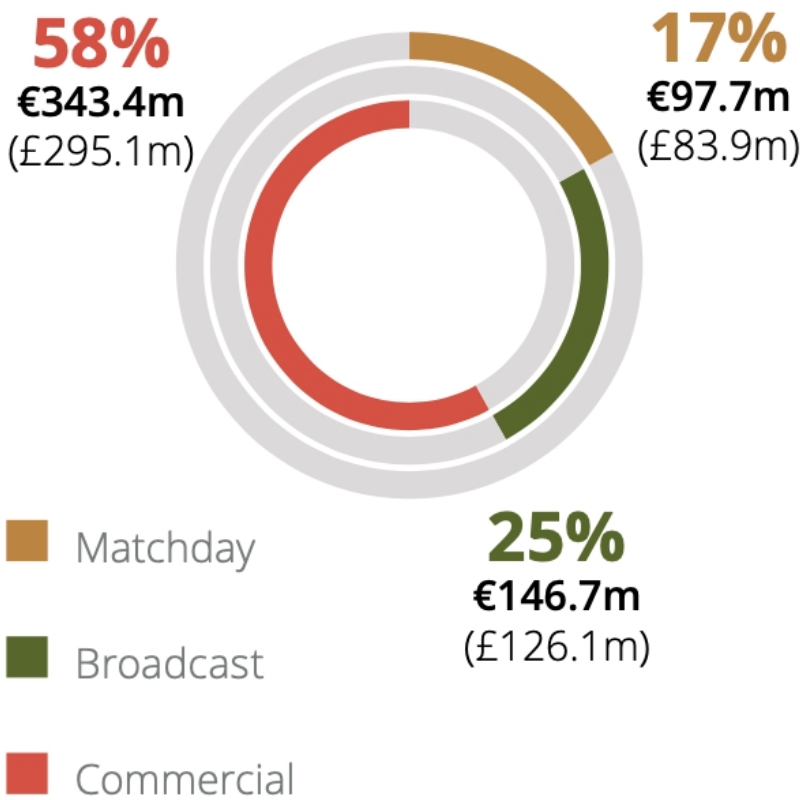
CASE STUDY



**FC BAYERN
MUNICH**



Revenue profile 2017 (€m)



Most clubs in premiere leagues in developed countries have 2-3 million fans in their domestic fan base. By conservative estimates, monetizing just one such team with one third of their fan base, we can re-direct \$10B worth of disposable income annually. At an average 3% commission Sports Dynamics can generate over \$300 million of revenue for a club annually.

UNTAPPED POTENTIAL

€600M+

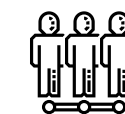
FRANCE

SPORTS
DYNAMICS

France is a developed country with the world's seventh-largest economy by nominal GDP, and the tenth-largest by PPP. In terms of aggregate household wealth, it ranks fourth in the world.

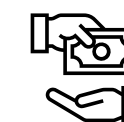
MARKET POTENTIAL

Football (soccer) is the most popular sports in France, with 1,993,270 licensed players in the leagues. Ligue 1 is the French professional league for association football clubs. It is the country's primary football competition and serves as the top division of the French football league system. Contested by 20 clubs, it operates on a system of promotion and relegation with Ligue 2.



POPULATION

67M



PURCHASING POWER

\$40K



MOST POPULAR SPORT

SOCCER



Estimated domestic fan base
35M-40M people

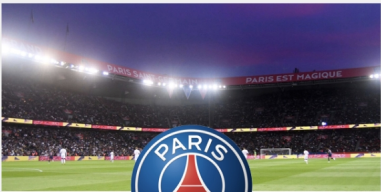




OLYMPIQUE DE MARSEILLE
ORANGE VELODROME



OLYMPIQUE LYONNAIS
GROUPAMA STADIUM



PARIS SAINT-GERMAIN
PARC DES PRINCES



RC LENS
STADE BOLLAERT-DELELIS



LOSC LILLE
STADE PIERRE MAUROY



MONTPELLIER HÉRAULT SC
STADE DE LA MOSSON ET DU
MONDIAL 98



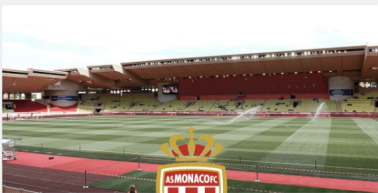
NÎMES OLYMPIQUE
STADE DES COSTIERES



OGC NICE
ALLIANZ RIVIERA



ANGERS SCO
STADE RAYMOND KOPA



AS MONACO
STADE LOUIS II



AS SAINT-ÉTIENNE
STADE GEOFFROY GUICHARD



DIJON FCO
STADE GASTON GÉRARD



FC GIRONDINS DE BORDEAUX
MATMUT ATLANTIQUE



FC LORIENT
STADE YVES ALLAINMAT



FC METZ
STADE MUNICIPAL SAINT
SYMPHORIEN



FC NANTES
STADE DE LA BEAUJOIRE LOUIS
FONTENEAU



RC STRASBOURG ALSACE
STADE DE LA MEINAU



STADE BRESTOIS 29
STADE FRANCIS LE BLE



STADE DE REIMS
STADE AUGUSTE DELAUNE



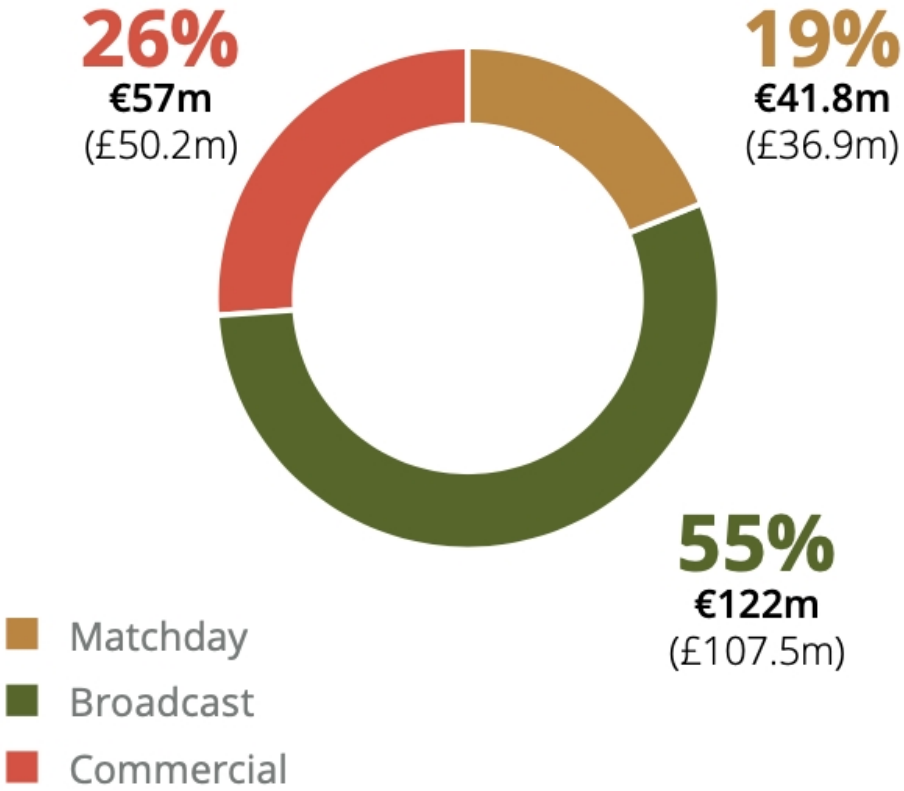
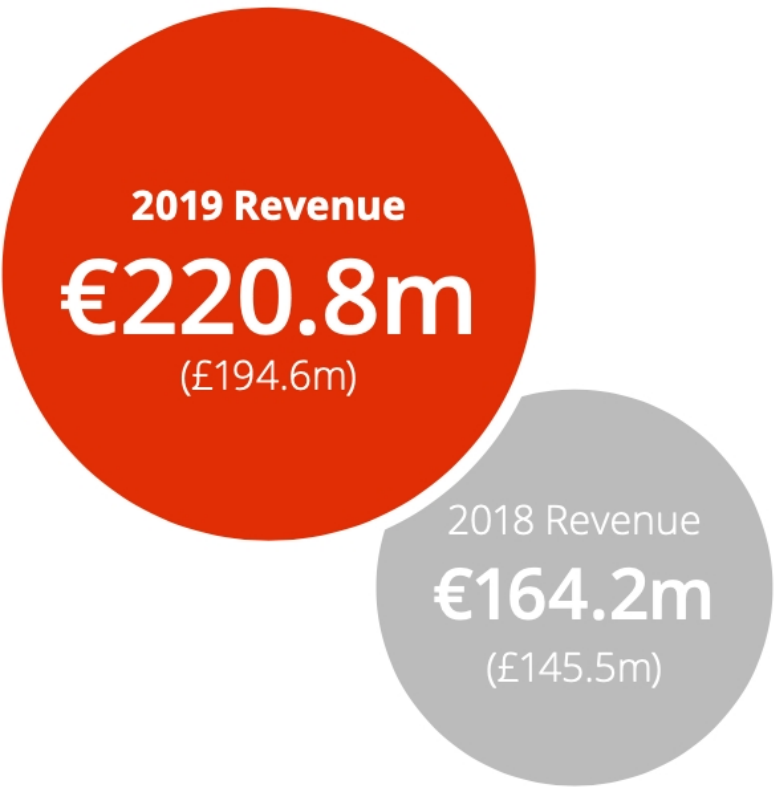
STADE RENNAIS FC
ROAZHON PARK

CASE STUDY



**OLYMPIQUE
LYONNAIS**

Most clubs in premiere leagues in developed countries have 2-3 million fans in their domestic fan base. By conservative estimates, monetizing just one such team with one third of their fan base, we can re-direct \$10B worth of disposable income annually. At an average 3% commission Sports Dynamics can generate over \$300 million of revenue for a club annually.



UNTAPPED POTENTIAL

€250M+

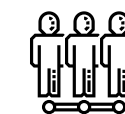
GREECE

SPORTS
DYNAMICS

Greece is a unitary parliamentary republic, and a developed country, with an advanced high-income economy, and a high quality of life, ranking simultaneously very high in the Human Development Index. Its economy is the largest in the Balkans, where it is an important regional investor.

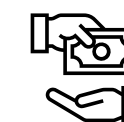
MARKET POTENTIAL

The Greek national football team, ranking 12th in the world in 2014 (and having reached a high of 8th in the world in 2008 and 2011),^[353] were crowned European Champions in Euro 2004 in one of the biggest upsets in the history of the sport.^[354] The Greek Super League is the highest professional football league in the country, comprising sixteen teams. The most successful are **Olympiacos, Panathinaikos, and AEK Athens.**



POPULATION

10.7M



PURCHASING POWER

\$20K



MOST POPULAR SPORT

SOCCER



Estimated domestic fan base
5M-10M people



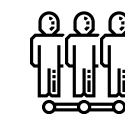
INDIA

SPORTS
DYNAMICS

India is the second-most populous country, the seventh-largest country by land area, and the most populous democracy in the world. India has become a fast-growing major economy and a hub for information technology services, with an expanding middle class.

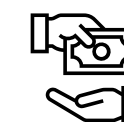
MARKET POTENTIAL

Cricket has a long history in India, having been introduced in the country during the British rule. It is by far the most popular sport in India. Cricket is played on local, national, and international levels, and enjoys consistent support from people in most parts of India.



POPULATION

1.37B



PURCHASING POWER

\$2.1K



MOST POPULAR SPORT

CRICKET

SPORTS DYNAMICS



Estimated domestic fan base
85M-100M+ people



**Chennai
Super
Kings**



**Delhi
Capitals**



**Kolkata
Knight
Riders**



**Mumbai
Indians**



**Punjab
Kings**



**Rajasthan
Royals**



**Royal
Challengers
Bangalore**



**Sunrisers
Hyderabad**

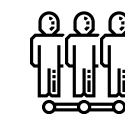
MEXICO

SPORTS
DYNAMICS

Mexico is a developing country, ranking 74th on the Human Development Index, but has the world's 15th-largest economy by nominal GDP and the 11th-largest by PPP, with the United States being its largest economic partner. Its large economy and population, global cultural influence, and steady democratization make Mexico a regional and middle power.

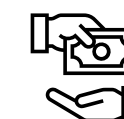
MARKET POTENTIAL

Mexico's most popular team sport is association football. Football is widely followed and practiced all over the country and it is considered the most popular sport in most states. Mexico has hosted two World Cup tournaments (1970 and 1986). Many of the stadiums in use in the league have a World Cup history. Sites such as Estadio Jalisco in Guadalajara, and Estadio Azteca in Mexico City are renowned for their national and international history. The legendary Estadio Azteca, for example, is one of the only two stadiums in the world to have hosted two men's World Cup finals (the other being the Maracana) and is one of the highest capacity stadiums in the world.



POPULATION

127.6M



PURCHASING POWER

\$10K



MOST POPULAR SPORT

SOCCER

SPORTS DYNAMICS



LIGA MX®

Estimated domestic fan base
40M-50M people



León



Pumas



América



Cruz Azul



Monterrey



Tigres



Guadalajara



Santos Laguna



Pachuca



Necaxa



Toluca



Puebla



Juárez



Mazatlán



Tijuana



Atlas



Querétaro



A San Luis

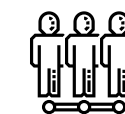
RUSSIA

Russia's economy is the world's eleventh-largest by nominal GDP and the sixth-largest by PPP. It has the world's second-most powerful military, and the fourth-highest military expenditure.

SPORTS
DYNAMICS

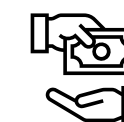
MARKET POTENTIAL

Football is the number one sport in the country. A high proportion of men are interested in it to a certain extent (and many children play it regularly) and women also join men when it comes to the national team. The Russian Premier League has a fairly high degree of competitiveness. Many notable talented foreign players have been and are playing in the Russian Premier League as well as local talented players worthy of a spot in the starting eleven of the best clubs.



POPULATION

144.4M



PURCHASING POWER

\$12K



MOST POPULAR SPORT

SOCCER

**SPORTS
DYNAMICS™**



Estimated domestic fan base
10M-15M people



ZENIT



LOKOMOTIV



FC KRASNODAR



PFC CSKA



FC ROSTOV



DYNAMO



SPARTAK



ARSENAL



FC UFA



RUBIN



FC URAL



FC SOCHI



AKHMAT



FC TAMBOV

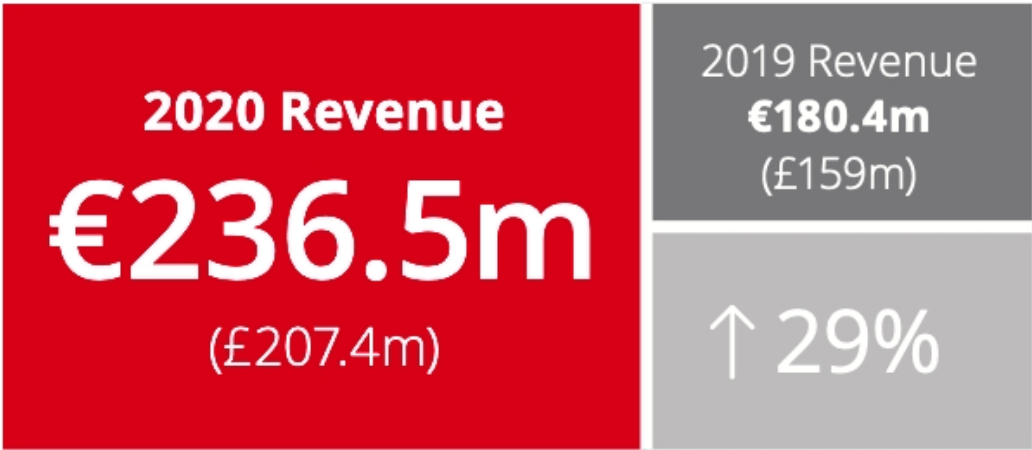


ROTOR

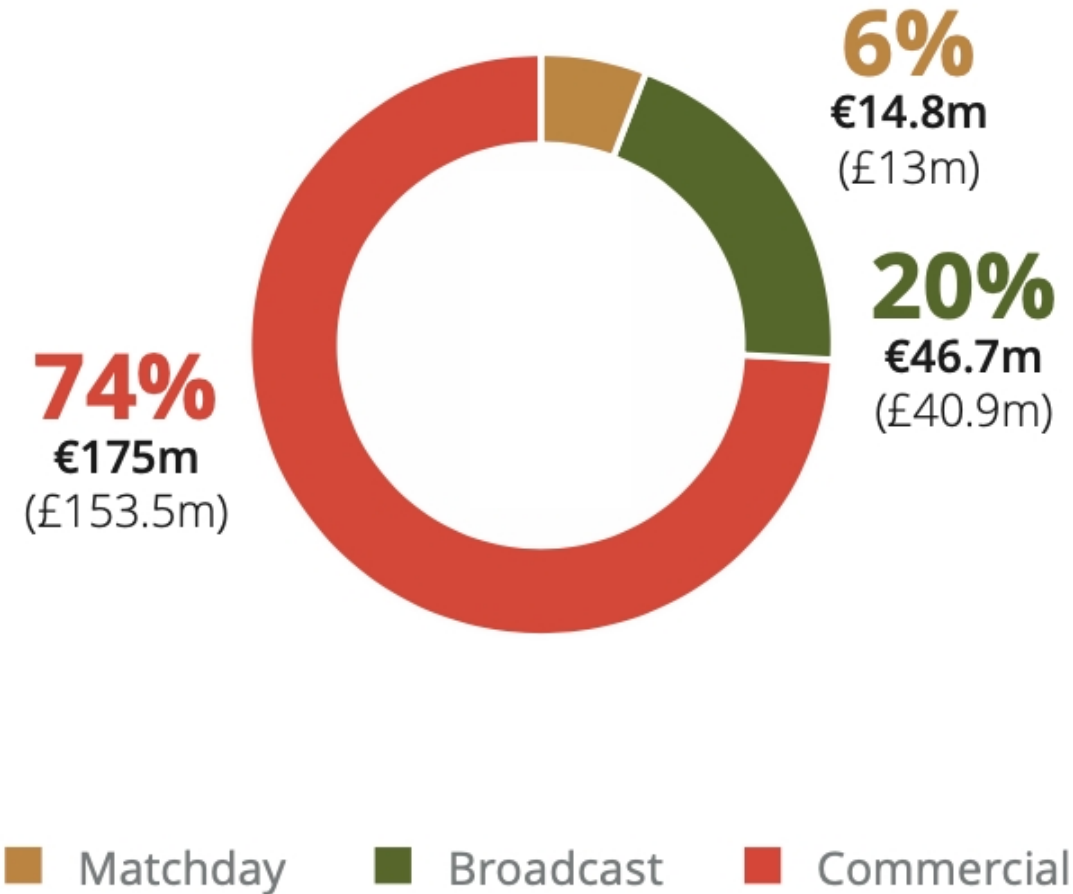


FC KHMKI

CASE STUDY



Revenue profile 2020 (€m)



FC Zenit St Petersburg has an estimated domestic fan base of 1-2 million fans. By conservative estimates, monetizing just one such team with one third of their fan base, we can re-direct \$1-4B worth of disposable income annually. At an average 3% commission Sports Dynamics can generate over \$100 million of revenue for a club annually.

