



Brazilian top teams X Global football leagues in commercial revenues 2021

Special analysis with new KPIs: Revenues, AD market size and Digital impact.



Methodology

Sports Value's new study main objective is to analyze the commercial revenues of Brazilian clubs, compared to international markets.



Commercial revenues include sponsorship and brand licensing. In Brazil, the TOP 20 teams in revenue were considered.



The Leagues' revenue data and teams were extracted from the published balance sheets, annual reports and studies of companies such as Deloitte and Forbes.

We analyzed the commercial revenues generated by the Leagues, which represent the teams of each first division competition.



Information such as GDP and advertising size market were included in the analyses. For the teams were included performance data in social networks.



Main conclusions

Brazil is the 7th largest GDP among the countries of the football leagues in the world.



The 5th most important global advertising market.

But only the 14th in league commercial revenues.

Brazilian clubs generate small resources through their brands.



Leagues Index

Commercial revenues / Advertising market

Spain and Portugal lead the index with 16% and 14% of commercial revenues, in relation to the advertising market size, respectively.



Brazil appears in penultimate place, with only 1%.



Brazilian clubs are far in comparison to smaller markets.

Data used

in US\$ million

RK	Leagues	Commercial Revenues	Country GDP	AD market	Commercial revenues / AD market
1	Premier League-UK	1.989	3.108.000	38.280	5%
2	Bundesliga-GER	1.562	4.230.000	26.700	6%
3	LaLiga- SPA	1.057	1.439.000	6.430	16%
4	Ligue 1- FRA	909	2.940.000	15.810	6%
5	Série A - ITA	881	2.120.000	9.590	9%
6	Russia	805	1.647.000	7.850	10%
7	MLS -USA	350	22.939.000	285.210	0,1%
8	Netherlands	339	1.007.000	4.870	7%
9	Belgium	317	581.000	4.980	6%
10	Turkey	294	800.000	2.830	10%
11	Mexico	250	1.285.000	4.460	6%
12	Austria	176	481.000	6.300	3%
13	Portugal	172	252.000	1.200	14%
14	Serie A- BRA	170	1.645.000	12.500	1%
15	Switzerland	122	811.000	2.600	5%
16	Denmark	116	397.000	2.200	5%
17	Norway	104	445.000	2.100	5%
18	Poland	78	655.000	3.200	2%
19	Scotland	77	205.000	2.200	3%
20	Sweden	70	622.000	4.960	1%
21	Chile	31	331.000	730	4%
22	Colombia	30	301.000	797	4%

22 football leagues in the world were analyzed, totaling US\$ 9.9 billion in commercial revenues in 2021.

Brazil X Leagues

GDP of the country of each League- US\$ million



Advertising market - US\$ million

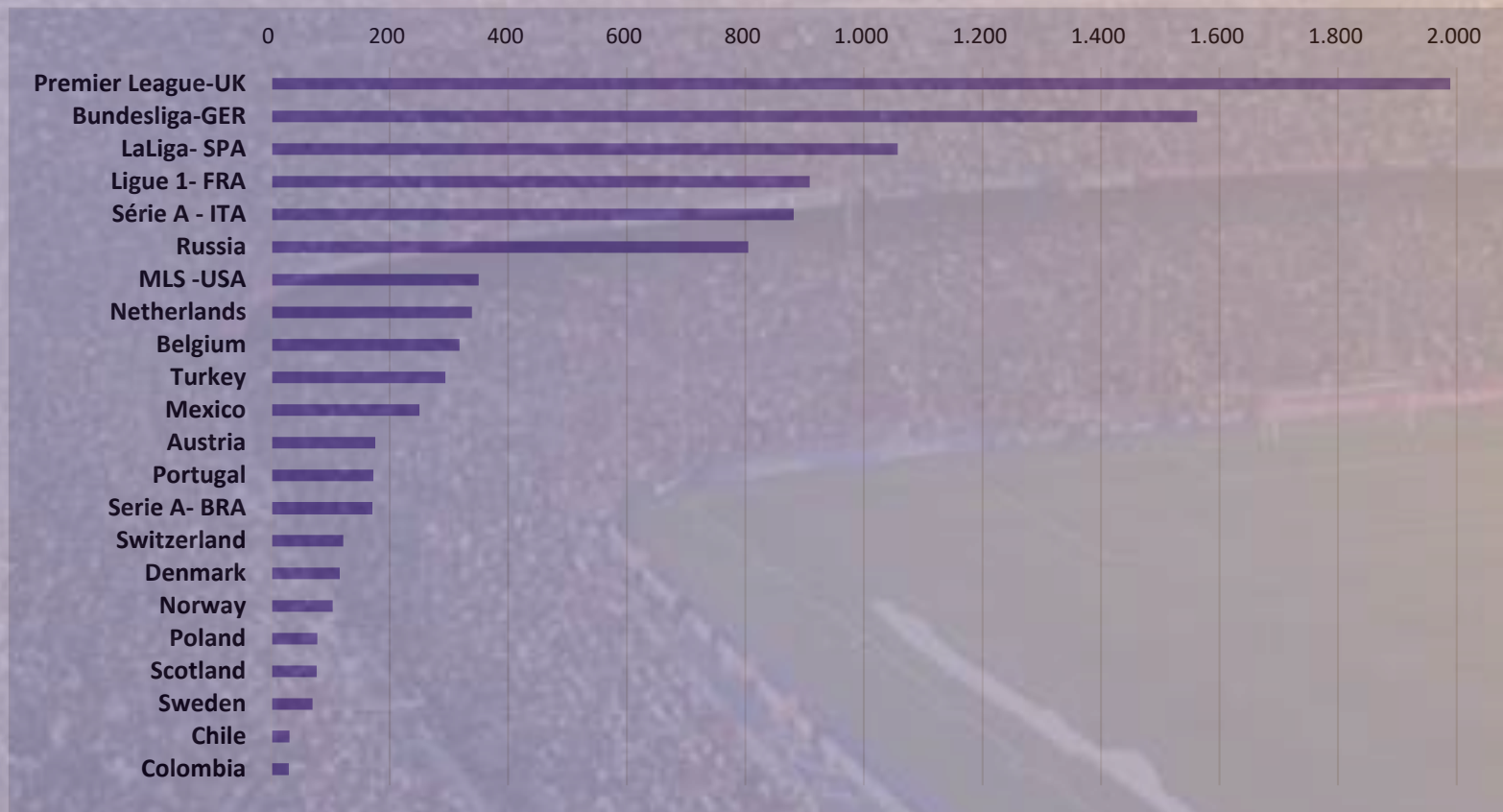


Brazilian market is very large, however Brazilian clubs are far below their potential in terms of commercial revenues.

Brazil, in advertising terms, among the 22 markets analyzed, is only behind the USA, England, Germany and France.

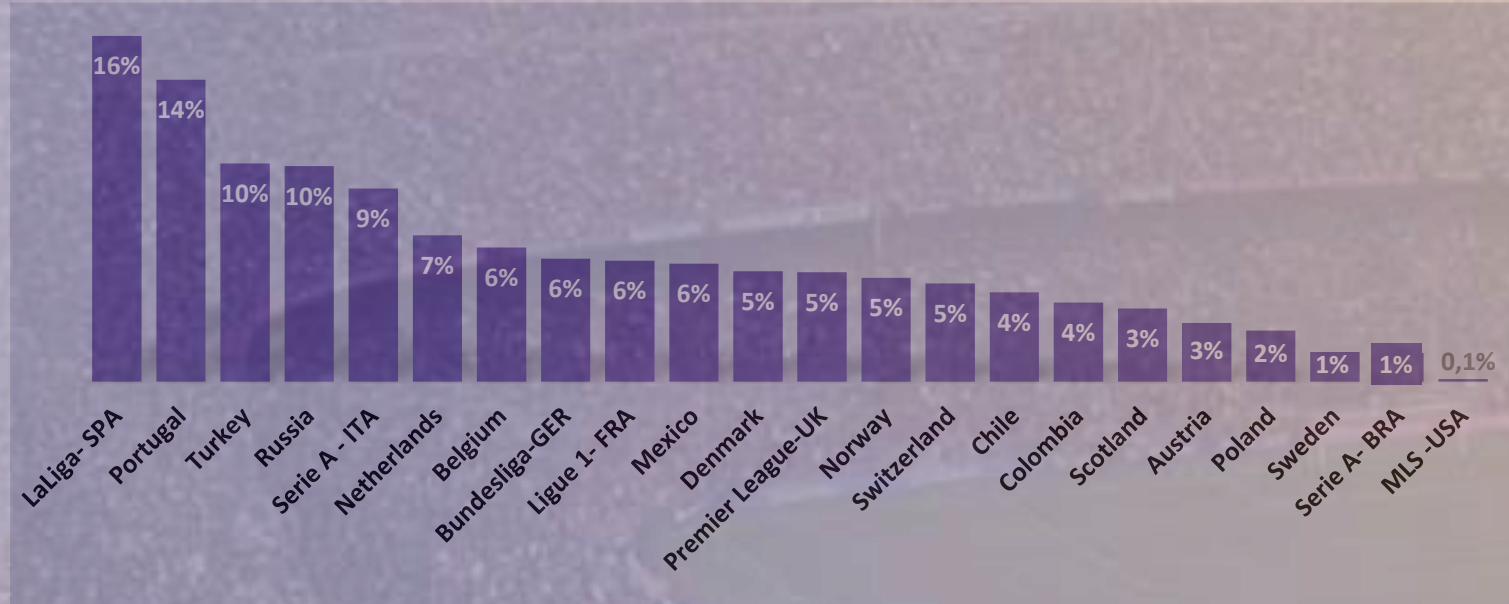
Brazil X Leagues

Commercial Revenues - Sponsorships and Licensing US\$ million



Brazil X Leagues

Index
Marketing Revenues Leagues / Advertising Market- In %



Commercial revenues from clubs in Brazil represent only 1% of the domestic advertising market.

The 22 markets analyzed average is 6%. U.S. presented huge AD market, that impacted the index. But MLS teams can generate much more revenues.

Brazil X Leagues

Marketing revenues X Advertising market size- In 2021- US\$ million



Sports Value Analysis

By the size of the Brazilian market, Brazilian clubs should make US\$ 625 million per year in commercial revenues, 3.6 times more than current figures.

Brazil X Leagues

Marketing revenues X Advertising market size- In 2021- US\$ million



Brazil X Leagues



Premier League is the most global and stronger in commercial revenues with more than 3.2 billion accumulated audience in 188 countries. US\$ 2 billion in commercial revenues generated by its global strength.



Bundesliga has enormous commercial strength, by the size of the largest European market. Bundesliga has the potential to grow beyond Bayern Munich. More global clubs would amplify the league's impact.



LaLiga is a great high spot of the study, because in addition the enormous strength of the duo Real-Barça, grew structurally. The league presented huge increase and has nowadays 150 million SM followers.



France's Ligue 1 and Italian Serie A are slightly behind in marketing revenues. Ligue 1 increased thanks to PSG. Serie A suffered from the recent Juventus supremacy, has high potential to grow.



Brazilian market is gigantic in advertising terms, worth 2x more than Spanish and 1.3x Italian. It's 2.8x bigger than the Mexican. However, clubs make only US\$ 170 million in commercial revenues.

Main teams' evaluation

Teams' evaluation

The match is no longer the only important content currently.

Sponsors want much more than visibility on boards and uniforms.

Focus is technological innovation, data, creativity, measurement and content marketing.

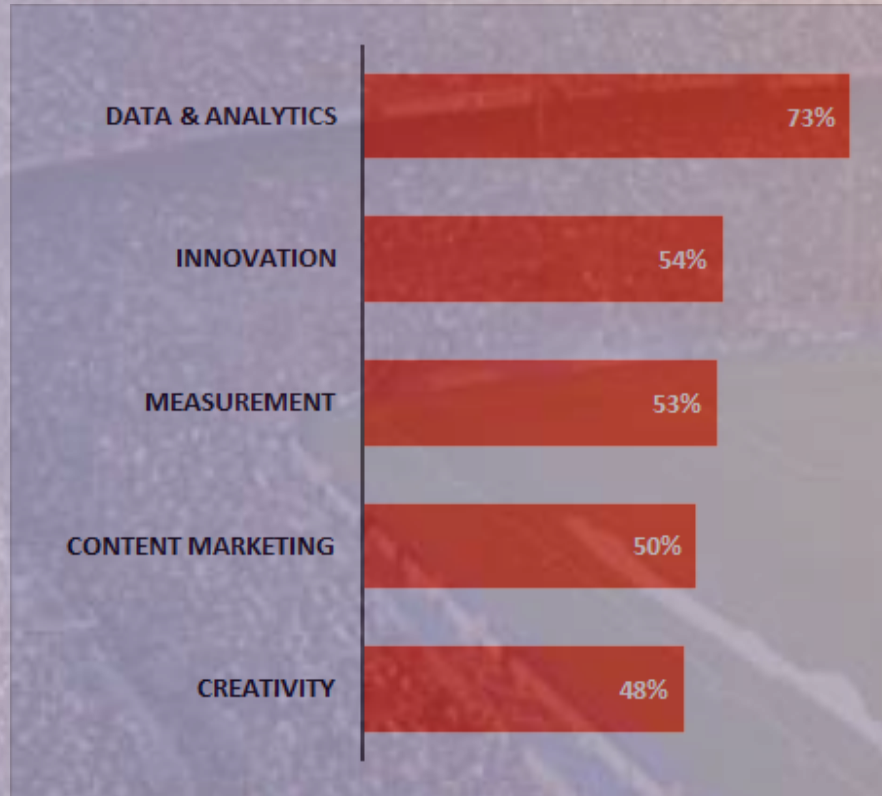
Clubs need powerful storytelling to leverage sponsorships.

Sportentertainment, idol power and digital transformation are the paths.



Teams' evaluation

Priority factors in the post-pandemic for sponsors in Europe.
Multiple responses - Changes in the post COVID-19



Source: ESA.

Teams' evaluation

In 2021

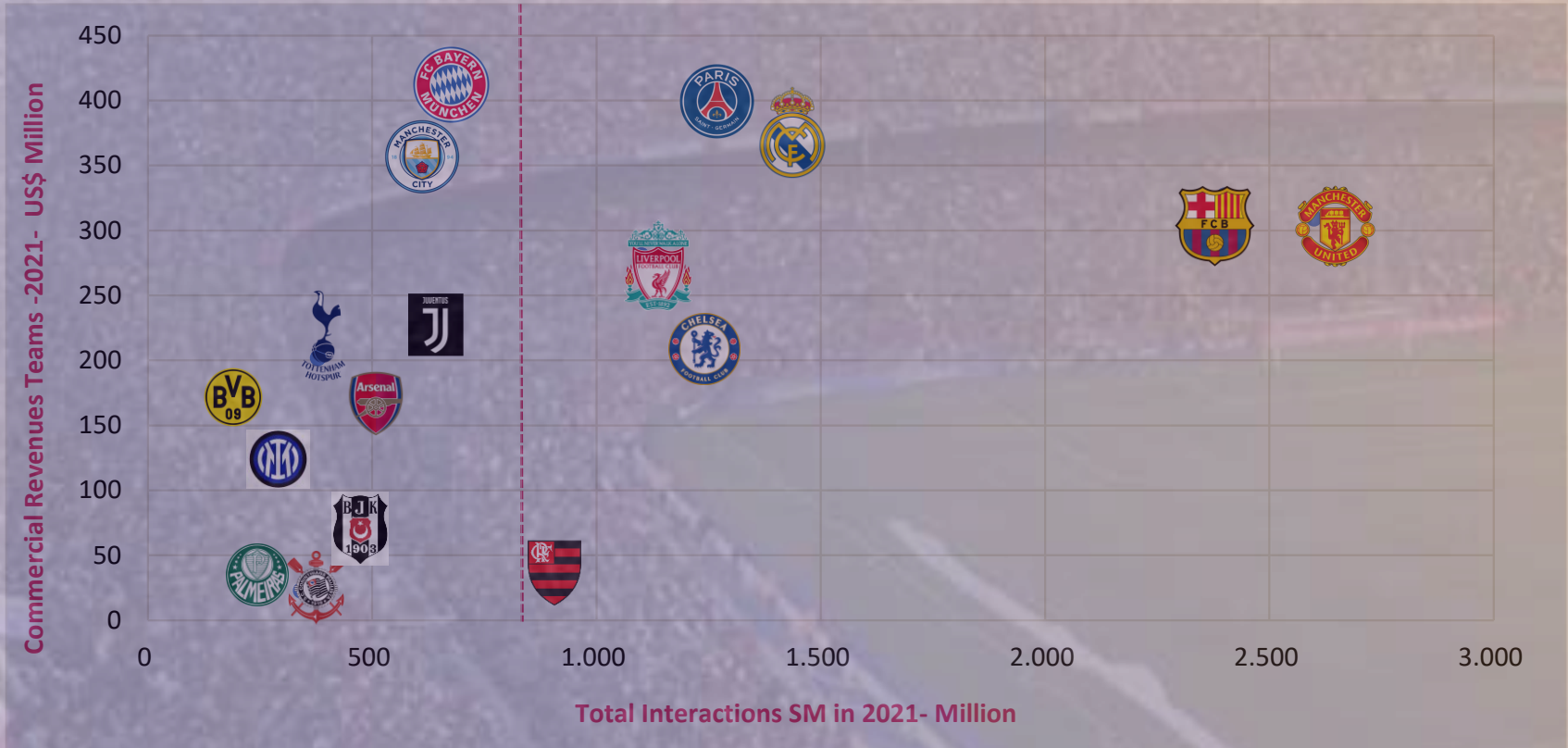
Commercial revenues in US\$ million

In million

Teams	Commercial revenues	Followers SM	Total Interactions 2021
Bayern Munich	407	94	635
PSG	398	127	1.300
Real Madrid	380	260	1.400
Manchester City	363	93	594
Barcelona	327	272	2.400
Manchester United	309	174	2.600
Liverpool	281	109	1.100
Juventus	223	103	628
Chelsea	208	111	1.200
Tottenham Hotspur	202	43	379
Arsenal	182	79	474
Borussia Dortmund	177	35	172
Internazionale	133	40	253
Besiktas	70	16	464
Palmeiras	31	15	281
Flamengo	29	45	887
Corinthians	23	28	341

Teams' evaluation

Commercial revenues 2021 X Social media interactions in 2021



Teams' evaluation

Commercial revenues 2021 X Social media interactions in 2021



Teams' evaluation



Bayer is enormous in commercial revenues, caused by the German domestic market and its international gigantism. There's a lot to grow in digital, social media numbers are lower compared to rivals.



High marketing revenues are not reflected in the size of the team in digital. City makes more revenues than Barcelona, with 4x less digital impact. Team has increased revenues with companies linked to owners.



Team also depended on contributions from companies linked to the controlling group. The seal with Jordan Brand and particularly the Messi's arrival boosted the team in the digital environment.



Even with poor results in football, it remains at the top of the teams with more digital impact and high marketing revenues. With high performance on the pitch would be unbeatable.



Unique team outside Europe that generates more than 887 M interactions per year. Club's marketing didn't capitalize all commercial potential. of this opportunities. Another problem is Serie A, without a League, CBF never manage correctly the competition. (E.g., Calendar).

***How can grow the
Brazilian clubs'
commercial
revenues?***

How can revenues grow?

Brazilian football has not kept pace with the modern trends of world sports marketing.

Sponsorship should be seen as a complete business platform and not just for brand advertising.

Brazilian clubs need to stop stocking brand uniforms, and structure complex delivery plans for dozens of sponsors.

Professional League creation is fundamental to growth. CBF has always managed poorly the football product in Brazil.



46 sponsors



35 sponsors



How can revenues grow?

Sponsorship revenues Brazilian Teams- In 2021- US\$ million



How can revenues grow?

Sponsorship trends

Purpose and Storytelling

Sponsorships should not only generate visibility, but they also need to make sense for the brand and especially for the world.

Data Driven Sponsorships

Data is the future of sponsorships. To talk to fans, brands want to get to know them in depth, so that campaigns are more assertive.

Far beyond the match

Impacts outside the game broadcast can be much greater for sponsoring brands.



How can revenues grow?

Sponsorship trends

Content marketing

Creating exclusive, impactful content and concrete monetization are the future of sports marketing.

Technological innovation

Sponsorships need to be aligned with technological advances. Analog and linear model does not generate digital return.

Improve measurement/create effective ROI

Traditional visibility measurement model in transmissions has become outdated and obsolete. More people watch videos on the Internet, download APPs, use ecommerce.



How can revenues grow?

What does every Brazilian football club need to create, according to **Sports Value**?

- Real and impactful storytelling.
- Purpose creation and new meaning for the brand and for sponsors.
- Qualitative awareness that is much more than just visibility.
- Impact the business in sales, customer loyalty and ROI.
- Monetize exclusive content and fan engagement. Sell products, far beyond official merchandise.
- Give access to data and constant relationship- Fans journey.
- Convert sponsorship properties into business drivers for sponsors.

Brazil needs to stop selling static sponsorship inventory.

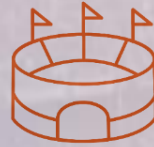
Understanding the fan base is the way for sponsorship brands to go more than just exposure on uniforms or advertising boards in the field.



Digital Transformation



Smart Stadium



Fan Engagement



Data Driven Sponsorship



Sports practice



Sports trends



Startups' consultancy



Business Plan for investors



ESG & Sports



Our services



Sports Marketing

Sport offers a unique platform for brands enhancement, engagement and consumer loyalty and effective sales expansion.



Sponsorships and activations

Sports sponsorship and its complementary activation actions are proven to be the best marketing tool for today.



Trends Reports

The ever-changing world requires companies, agencies, clubs and federations to make their decisions in anticipation of trends and directions in today's world.



Startups Consultancy

The world's startup ecosystem represents US\$ 1 trillion today. In sports already exceeds US\$ 9 billion and is expected to triple over the next five years.



Sports Branding

In today's ever-changing world and with increasing consumer demand, branding or brand management becomes even more essential.



Brand valuation

Branding is a fundamental discipline in the global business. Brands are constantly evolving and must be at the heart of every management.



Sports properties valuation

Sports Value is the first company in the Brazilian market to evaluate sports assets, with its own methodology and extremely consistent premises.



International Affairs

The rapidly evolving world demands that sports marketing projects have a global character today.

Contacts



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