

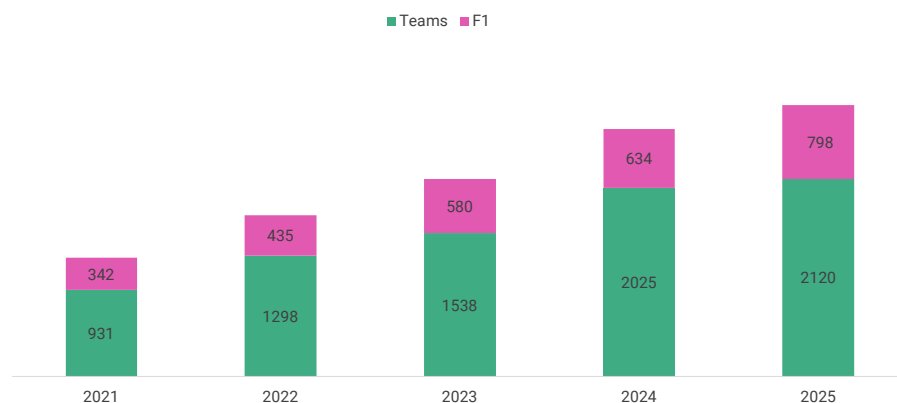
2025 F1 sponsorship spend hits \$2.9bn as cryptocurrency brands ramp up spending

Spend up 10% already on 2024 as Netflix's series Drive to Survive sees popularity of F1 soar as it heads in 75th year

London, 13th March 2025: As it reaches its 75th season, Formula 1 is enjoying impressive initial sponsorship growth of 10% versus 2024 as cryptocurrency and SAS/software players compete to support teams. The popularity of Netflix's *Drive to Survive* series is partly responsible for the growth in profits for another year. Trackside, a flurry of driver changes has seen team sponsors change, making for a dynamic and eventful off-season. This has fostered a more competitive, robust market — further increasing total sponsorship market value.



Formula One YoY Growth, Total sponsorship deal value per year, \$m USD



Source: Ampere Sponsorship
* 2025 F1 revenue is projected

Key Facts: F1 total sponsorship revenue already up 10%

- F1's total sponsorship revenue is up 10% for the 2025 season so far, driven by new major deals for the organisation and its teams. F1 has capitalised on the popularity of Netflix's series *Drive to Survive*, and Liberty Media's strategic management since acquiring the series. In addition, the organisation has successfully restructured and increased the product categories available to sponsors to elevate profits
- With the new season of *Drive to Survive* just launched, it continues to bring audiences to the sport. According to Ampere's title-level Popularity Score - a measure of global

Internet search activity - *Drive to Survive* was the most popular sports documentary available on SVoD in 2024

- Ampere estimates that sponsorship spend across F1 and its teams has now reached over \$2.9 billion**
- Teams account for 72% of total sponsorship revenue, with corporate F1 deals contributing the remainder
- The Williams' title sponsorship deal with Australian software corporation Atlassian is the largest team asset sold for the upcoming season so far. Ampere estimates this to be worth between \$25-35m annually. Mercedes AMG's deal with Adidas is the largest apparel-focused partnership of the off-season
- F1's drive for global appeal has helped attract major US brands, which account for over 34% of new deals for the season so far – the highest of any nation. Atlas Air, Okta, and Xerox are among the debuting brands
- New badge deals for 2025 come from major players, including a 10-year \$1bn deal with luxury brand LVMH*** and F1. Further deals include American Express entering its first full season as a F1 Global partner and IBM with Scuderia Ferrari.

Key sponsors for 2025: Cryptocurrency and Software take a large bite

- Technology and financial service brands are the largest investors, each accounting for around 20% of all new sponsorship deals signed for the 2025 season
- Cryptocurrency and software/SaaS brands remain at the forefront within these sectors, with six and three new deals each. Notable collaborations include Gate.io with Red Bull and Coinbase with Aston Martin
- Value-in-kind partnerships are becoming more common, driving technological innovation within budget constraints. This is exemplified by deals this off season such as between Greene Tweed with McLaren, and Visa Cash App RB with Dynatrace
- Gambling brands have been one of the highest spending sponsorship sectors globally, and are having their most active off-season since 2023, following a quieter 2024. Four deals have either been extended or newly established in a notable resurgence, including two for UK Lottery operator Allwyn with F1 and McLaren Racing
- The average number of sponsors per team is 32. McLaren leads with 51 unique partners.

Adam Lewis, Analyst at Ampere Analysis says: *“F1 teams have capitalised on the series' growing attention in recent seasons, adopting varied sponsorship strategies. McLaren has pursued a high-volume approach, securing numerous sponsorships across several product categories, while Red Bull has focused on fewer deals with wide-ranging*

activity. Following a season of heightened on-track competition, and an off-season of incredibly lucrative sponsorship deals and expanded brand collaborations, we expect another successful year for the series."

Ends

Notes to Editors

*Projection based upon Ampere's proprietary sponsorship value model

**Spend includes the fair value of goods and services received by the team as part of sponsorship agreements

***LVMH's deal is counted as a single entity for spend

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About Ampere Analysis

Founded in January 2015, Ampere Analysis is a new breed of media analyst firm. The company's experienced team of sector-leading industry analysts specialises in sport, games, pay and multiscreen TV and next-generation content distribution. Our founders have more than 60 years combined experience of providing data, forecasts and consulting to the major film studios, telecoms and pay TV operators, technology companies, TV channel groups and investment banks. www.ampereanalysis.com