

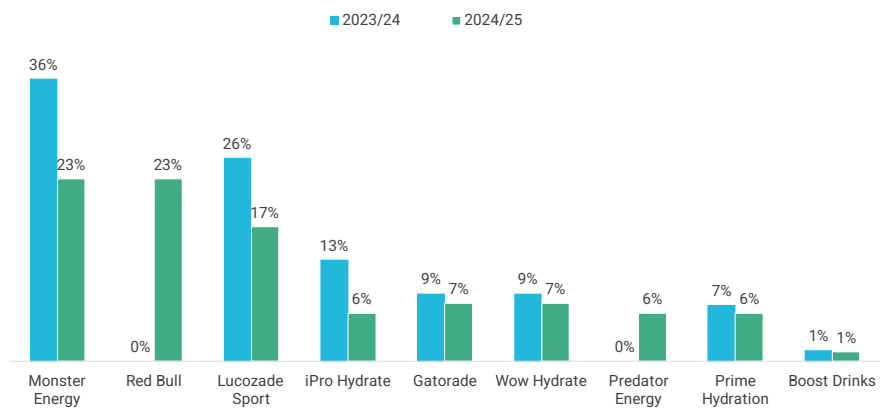
Red Bull's UK football sponsorship debut matches Monster Energy's market share

The brand's entry into UK football has boosted the value of the energy drink sector's sponsorship spend by 17% this year

London, 4th November 2024: Energy drink brand Red Bull signed five new sponsorship deals this year – the most of any brand in UK football in 2024. From a standing start, contracts with Newcastle United, West Ham, Crystal Palace, Everton, and Leeds United form an aggressive market entry strategy. Now with 23% of the total spend of all energy drink brands for the 2024/25 football season, its investment equals rival Monster Energy according to new research from Ampere Analysis. Overall the energy drinks sector's total sponsorship spend has grown 17% in UK football since 2023. Fierce competition between brands will stimulate further investment – a trend observed in the US where there's been a steady 8% sponsorship spend growth of the soft drink sector since 2022, driven by rivals Coca-Cola and Pepsi.



Energy Drink Spend in UK Football, % of Sector Total Deal Value per Year



Source: Ampere Sponsorship

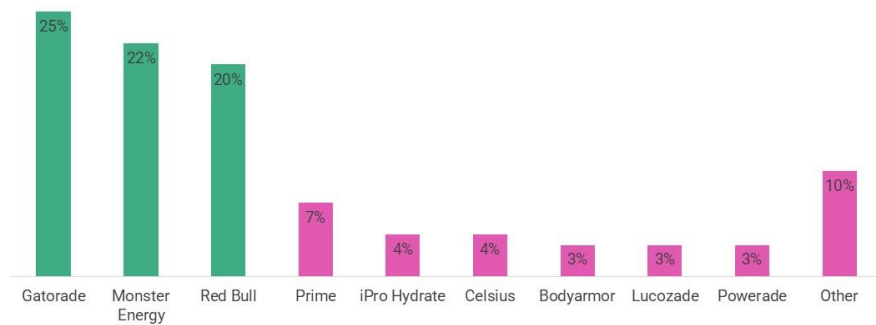
Key facts: Red Bull, Monster Energy and Lucozade

- Following its purchase of a minority ownership stake in Leeds United in June, Red Bull has signed the most new sponsorship deals of any brand within UK football in 2024. Its escalation from zero to five deals signed during the Premier League off-season signals a long-term intention to invest in the sport

- Red Bull is now on par with Monster Energy for sector spending for 2024/25, with both brands accounting for ~23% of energy drink brand sponsorship. Monster Energy's share of the sector's sponsorship market has fallen from 36% in 2023
- Red Bull has taken a highly strategic approach to its deal-making, replacing Monster Energy at Premier League clubs West Ham and Newcastle in September this year. Monster Energy currently has deals with eight clubs, notably maintaining long-term partnerships with Tottenham and Liverpool, and recently signing a new contract with Brentford FC in August 2024 — indicating its intent to remain a sponsor in the Premier League
- During its 2024 sponsorship spending spree, Red Bull replaced Everton's incumbent sponsor Lucozade. However, British brand Lucozade continues to be a strong player in the sector, at 17% of spend by energy drink companies. It is currently ranked third by spend in UK football after Monster and Red Bull
- Energy drink's total sponsorship spend has grown 17% in UK football since 2023. This increased investment is also happening in the US soft drink sector. Deals by Coca-Cola and Pepsi Co have grown sponsorship spend by 8% annually since 2022.



Energy Drink Spend Globally, % of Sector Total Deal Value per Year



Source: Ampere Sponsorship

Key facts: Gatorade, Prime Hydration, and WOW Hydrate

- Several other energy drink brands could be replaced or renewed in the coming Premier League seasons. Prime Hydration holds its only UK-based deal with Arsenal. Manchester United has partnered with UK-owned WOW Hydrate since 2023
- Manchester City's Gatorade deal is due to expire at the end of the 2024/25 season and is yet to be renewed. This deal could reach between £6m-£10m based on the scale of the current deal and market trends. Ampere's Consumer data underlines the

football sponsorship opportunity for brands. Manchester City fans are 37% more likely than the average consumer to have purchased energy drinks in the past. They are 37% more likely to be considering future purchases of energy drinks

- While Gatorade only has one major deal sponsorship deal in UK football with Manchester City, the company accounts for 25% of global sponsorship spend by energy drink brands (across all sports covered by Ampere). This is followed by Monster Energy at 23% and Red Bull at 20%. Gatorade's lack of investment in the UK provides opportunities for both Monster Energy and Red Bull to invest in the market thereby bridging the competitive gap and strengthening their global positioning in the energy drink sponsorship market.

Adam Lewis, Analyst at Ampere Analysis says: "Red Bull has adopted a unique strategy for entering the UK, tactically partnering with multiple clubs across football. With five deals so far with Premier League clubs and part ownership of Leeds United, this is a resolute investment into a key market for the brand. Competitors Monster Energy and Lucozade will likely consider options for increasing spending to maintain their market share, creating opportunities for rights owners without energy drink partners. Other challenger brands, such as Prime Energy or the returning Predator Energy, will need to fight for their place in the coming seasons, likely furthering sector spend. Clubs will reap the benefits of this energy drink competition; Red Bull has lit the spark for sector growth."

Ends

Notes to Editors The data analysed in this release is sourced from Ampere's Sponsorship deals database. It examines sports sponsorship data collected for the years 2022 to 2024, across 16 sports - American Football, Aussie Rules Football, Athletics, Baseball, Basketball, Cricket, Cycling, Football/Soccer, Golf, Ice Hockey, Mixed Martial Arts, Motor Racing, Professional Wrestling, Rugby, and Tennis. UK Football encompasses the National Football Federations, the English Premier League, the Scottish Premier League, and the EFL Championship.

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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