

THE BUSINESS OF THE ENGLISH PREMIER LEAGUE 2019-20



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- The report reviews **450** different sponsorship deals across the league and its **20** teams. Across the team and league websites there are **383** brands found.
- Manchester City has the highest number of unique deals with **48** whilst Sheffield United hold the fewest deals with **7**.
- The average number of sponsors per team is **22.5**.
- The total value of the kit supplier deals is greater than the combined league value of its front-of-shirt sponsorship deals with **\$482.84m** compared to **\$450.3m**.
- **Manchester United** continue to dominate the league commercially at least, holding the highest sponsorship revenue with **\$323.87m** whilst Sheffield United recorded the lowest sponsorship revenue, **\$4.28m**.
- **Manchester United** reign supreme off the pitch, beyond its financial records, with the most social media followers **123.4m**, the highest average attendance last year, **75,102**, as well as securing the highest kit deal and front-of-shirt sponsorship deal, worth **\$101.2m** and **\$78.86m** respectively.
- The Premier League contains the fewest domestic managers across the top 5 European leagues with just **40%** compared to Spain which has the highest with **85%**.
- **Heineken** and **Etoro** are named the two most active brands, outside of major kit suppliers, holding **six** unique deals each across the league.
- **Financial Services** is the most active sector in the league, with **65** major deals.
- The Premier League media rights deals this season continue to increase in value, estimated to be **\$3.69bn** throughout the 2019/20 campaign.
- **546** players make up the Premier League list of players for the upcoming season, of which **34.25%** are **English**.

All Data within this report has been collated from the Sportcal Sponsorship Intelligence Centre and is correct as of **17/07/2019 unless otherwise specified.*

Premier League 2019-20



Founded:
1992

Confederation:
The Football Association

Number of teams:
20

Current Champions:
Manchester City

Most Championships:
Manchester United (20)

Average Attendance:
38,630

Number of Sponsors:
8

Sponsorship Revenue (estimated):
\$80,980,000



www.premierleague.com/news/870004



www.premierleague.com/news/1291167



www.premierleague.com/news/812561



www.premierleague.com/news/1245340

In February 2016, the Premier League announced that it would move away from its existing sponsorship strategy ahead of the 2016/17 season in a bid to enhance its global appeal. Since the league's inception, a title sponsor was synonymous with the league as firstly beer brand Carling, between 1993/94 and 2000/01, then banking giant Barclays took on the title sponsorship from 2001/02 to 2015/16. The idea behind ditching the title sponsorship, which generated \$48.5 million per season, was to develop a clean brand image for the Premier League, following in the footsteps of American sports leagues such as the NBA and NFL as a means of enhancing the league's value beyond TV. The partnership strategy for the league has pivoted to multiple partnerships, with seven category partners providing the league with greater flexibility while opening up opportunities for the clubs.

Barclays retained their partnership with the league, despite dropping title sponsorship rights in 2016, to become the official bank and most recently signed until through to end of the 2021/22 season. Budweiser, a new partner for 2019, will run the 'Be a King' campaign in a bid to inspire fans by connecting them with 'Kings' of the league. This season will also see the introduction of the new Nike 'Merlin' ball which has been exclusively produced for the Premier League, coinciding with the brand's 20th anniversary partnership with the league. Other sponsor initiatives include Coca-Cola's first nationwide trophy tour and EA Sports launch of the ePremier League, an online FIFA competition launched last season.

Lead Partner	Official Bank	Official Beer	Official Snack	Official Soft Drink	Official Ball Supplier	Official Timekeeper	Official Licensees
							 

Average Attendances

Team	Average Attendance
Manchester United	74,498
Arsenal	59,899
West Ham United	58,336
Tottenham Hotspur	54,216
Manchester City	54,130
Liverpool	52,983
Newcastle United	51,121
Chelsea	40,437
Everton	38,780
Aston Villa	36,029
Leicester City	31,851
Wolverhampton Wanderers	31,030
Brighton & Hove Albion	30,426
Southampton	30,139
Sheffield United	26,175
Norwich City	26,014
Crystal Palace	25,455
Burnley	20,534
Watford	20,016
AFC Bournemouth	10,532

Green represents Promoted teams

Despite going through a rough period on the pitch, Manchester United fans are still turning up to support the team. With an average attendance that dwarfs every other team in the league, Manchester United can still count on match day revenue to form a large portion of their income. With a global fan base willing to travel to see the team play at the 'Theatre of Dreams', Manchester United have managed to capitalise and leverage their global brand like perhaps no other team.

In terms of attendance, West Ham United have almost doubled their attendances since moving to the London Stadium, formerly the host venue for the London 2012 Olympic Games, meaning that while the fans may still be getting to love the stadium, this has not prevented them attending. Similarly, Tottenham's move into their new stadium at the end of the 2018/19 has seen them join the ranks of the elite clubs in terms of attendance. Everton will be hoping for a similar impact from their new stadium, while Wolverhampton Wanderers will be looking to move up the table once the announced redevelopment of their home ground Molineux has been completed.

With Bournemouth entering their fourth season in the top flight, they still have by far the lowest average attendance in the division, which highlights that despite the obvious financial discrepancy between them and other clubs, the team guided by Eddie Howe has continuously punched well above it's weight. The question becomes whether such an approach is sustainable in the long term, especially in the area of FFP, which puts huge pressure on the Commercial department to keep producing new partnerships and sponsorships.

Team Salary Breakdown – 2018/19

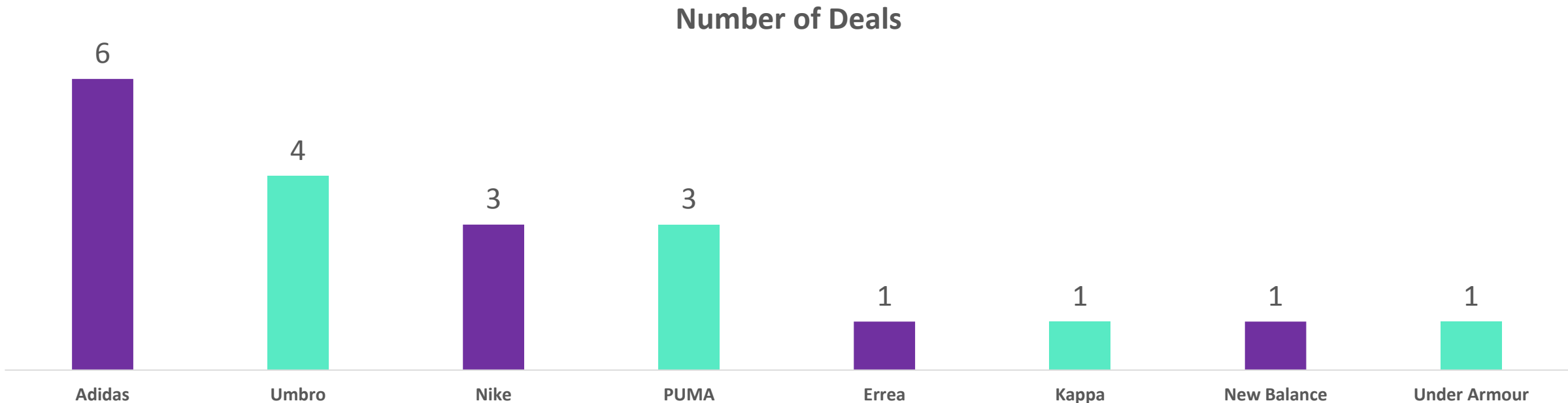
Team	Annual Salary Spend	Average Salary per point earned	Final League Position
Manchester United	\$393.87M	\$5,967,727	6 th
Liverpool	\$349.96M	\$3,607,835	2 nd
Manchester City	\$345.97M	\$3,530,306	1 st
Chelsea	\$324.68M	\$4,509,444	3 rd
Arsenal	\$296.73M	\$4,239,000	5 th
Tottenham Hotspur	\$196.94M	\$2,773,803	4 th
Everton	\$194.27M	\$3,597,593	8 th
Leicester City	\$158.35M	\$3,045,192	9 th
Crystal Palace	\$155.69M	\$3,177,347	12 th
Southampton	\$150.36M	\$3,855,385	16 th
West Ham United	\$142.38M	\$2,738,077	10 th
Bournemouth	\$135.73M	\$3,016,222	14 th
Newcastle United	\$125.08M	\$2,779,556	13 th
Watford	\$114.44M	\$2,288,800	11 th
Burnley	\$109.11M	\$2,727,750	15 th
Brighton & Hove Albion	\$103.79M	\$2,883,056	17 th
Huddersfield Town	\$83.83M	\$5,239,375	20 th
Fulham	\$71.85M	\$2,763,462	19 th
Wolves	\$67.86M	\$1,190,526	7 th
Cardiff City	\$63.87M	\$1,878,529	18 th

Since the retirement of Sir Alex Ferguson, it is unarguable that Manchester United have underachieved. With repeated failures to qualify for the Champions League alongside a dearth of silverware, the club has attempted to throw money at the problem by targeting and signing big name players such as Paul Pogba and Alexis Sanchez to help improve fortunes to no avail. In fact, champions Manchester City spent over £2m less per point to finish top of table, showing that money alone is no guarantee of success.

At the other end of the table, Huddersfield Town were arguably the worst performing team in the league when looking at wages spent. In a campaign that saw them finish bottom of the table, only Manchester United spent more per point earned than Huddersfield.

In contrast, Wolverhampton Wanderers and Tottenham Hotspur are arguably ‘pound for pound’ kings of the Premier League given their finishing positions in context of their annual salary spend. While Tottenham finished in the top four and reached the Champions League final, newly promoted Wolverhampton Wanderers confounded critics and fans across the country by finishing in 7th place despite having the second lowest wage bill in the division.

Red represents relegated teams



Adidas lead the way amongst the kit suppliers in the Premier League, with some of the biggest deals in the league belonging to the German marque. The brand, in addition to its record breaking deal with Manchester United, has added Arsenal to its portfolio of clubs in major European cities alongside Madrid, Munich, Milan and Manchester. Since being sold by Nike, Umbro have made significant strides back into the English football market, overtaking former parent company Nike who only have three deals currently. PUMA have swapped Arsenal for English champions Manchester City in one of the largest deals in world soccer.

With only one deal currently in place with European champions Liverpool, New Balance have associated themselves with the clubs resurgence. However, with this deal expiring at the end of the 2019/20, the US brand will no doubt have to significantly raise the fee currently being paid for their association with the six time European champions, with the club no doubt looking at the fees paid to the likes of Manchester United, Manchester City and Chelsea as a guide. While New Balance are able to match any offer made, it remains to be seen whether the expected increase in value for Liverpool's kit deal will force New Balance to walk away from English football.



Arsenal – Adidas:

The North London club signed a new five year deal in October 2018, replacing PUMA with Adidas for the 2019-20 season. The deal is reported to be worth twice the value of Arsenal's deal with PUMA. The German brand previously sponsored the team between 1986 and 1994. The new shirts have taken inspiration from the teams previous Adidas kits of the early 1990's.



Aston Villa – Kappa:

A new supplier for the upcoming season, as Aston Villa switches from LUKE 1977 to Italian manufacturer Kappa. The three-year deal was announced in May 2019 via a video of a man spray painting the brands logo onto a wall outside of Villa Park.



Bournemouth – Umbro:

The coastal town team will embark on their third straight season with Umbro, as part of its five-year deal with the British manufacturer. The deal began in 2017 and was described as a club record kit deal and was announced with images of the pair's logos in sand. This season's kit remains consistent with recent seasons, but with more detail on the stripes and have added a maroon colour to its sleeve.



Brighton & HA – Nike:

In June 2019, the Seagulls opted to renew its contract with Nike to extend the partnership for a further three years after first signing with them in 2014. The new shirts offer a slightly darker blue on the home kit and a switch from green to black for the away colours.



Burnley – Umbro:

The new season will see Burnley back competing in Umbro kits as part of its new three year deal. The British manufacturer was the teams very first kit supplier in 1975 and last played in Umbro material during the 1980-81 season. Despite the change of supplier and front-of-shirt sponsor, the kit offers little change to the claret and blue kit of last season, with a slightly cleaner version brought in.



Chelsea – Nike:

The Chelsea-Nike partnership enters into its third year of a current 15-year partnership set to end in 2032. The new season will see a dramatic change to the team kits, with a dark design added to the home kit, said to be based around the architecture and beams of Stamford Bridge. The South-West London team has also toned down its away kit, moving from yellow to white.



Crystal Palace – PUMA:

The South London team will continue to play in PUMA kit for the upcoming season. Palace revealed their new home kit in their last match of the 2018-19 season, with the kit adding touches of white for the first time in ten years. The away kit has had the most dramatic change, moving from white to black and includes a wavy graphic down the middle in the teams traditional red and blue colours.

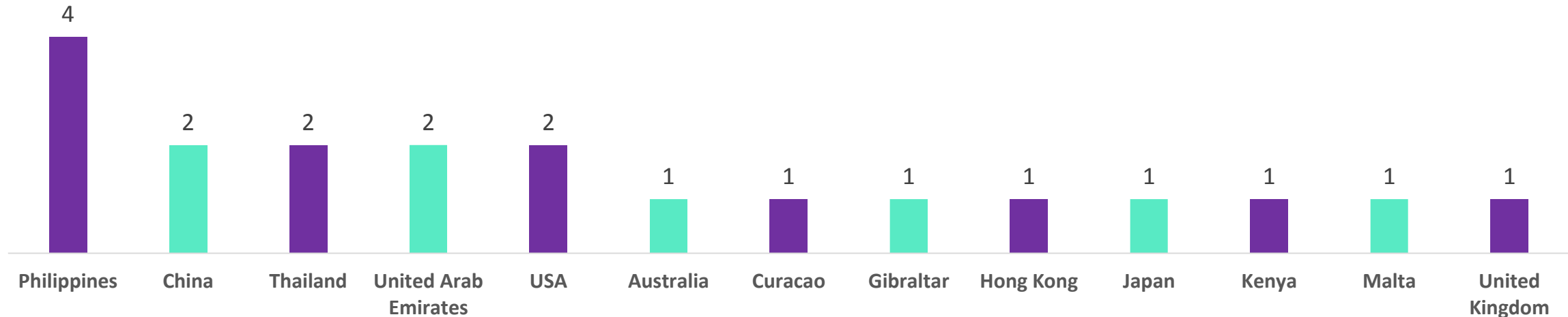


Everton – Umbro:

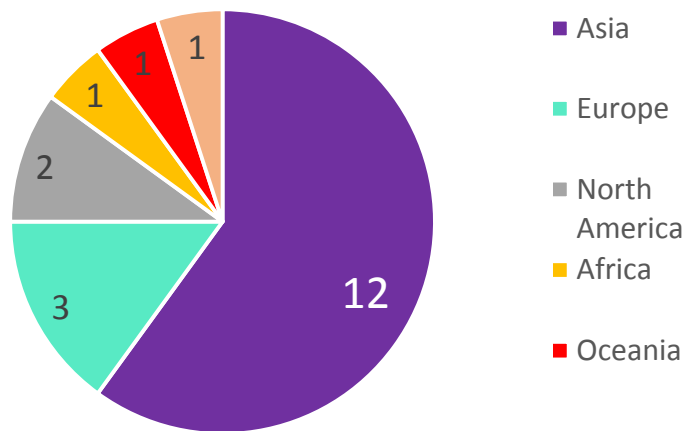
Ahead of the new season, Everton renewed its contract with Umbro for a further three years, which began in 2014. The news kits have had a clear makeover, with the new home kit featuring a criss-cross pattern inspired by Goodison Parks Bullens Road stand; as the away kit moves from white to salmon colour.

Front of Shirt Sponsorship – Location Breakdown

Number of Deals



Continental Deals



The Premier League's international appeal has seen a strong influx of foreign, and in particular, Asian brands choosing to partner with the team in the league. This season, Asian brands will account for 60% of all front-of-shirt sponsorship in the league, meaning brands are able to indirectly advertise to its main home market thanks to the popularity of the league in Asia. Thanks to the international rights packages sold by the league, fans in the region have easy access to the league making these investments worthwhile.

The strong connection between soccer and gambling has also seen the increase in the number of betting brand front-of-shirt sponsors in the league, with these brands making up 50% of all team deals.

The massive increase in value teams are able to attain from sponsors nowadays is the reason why the market has moved to Asia, as British brands are simply unable to financially compete and as a result only hold one FOS deal (Liverpool).

Front of Shirt Sponsorship – Staying local

<u>Team</u>	<u>Sponsor</u>	<u>HQ</u>	<u>Team</u>	<u>Sponsor</u>	<u>HQ</u>
Arsenal	Emirates	United Arab Emirates	Manchester City	Etihad Airways	United Arab Emirates
Aston Villa	W88	Thailand	Manchester United	Chevrolet	USA
AFC Bournemouth	Mansion Bet	Gibraltar	Newcastle United	Fun88	China
Brighton & Hove Albion	American Express	USA	Norwich City	Dafabet	Philippines
Burnley	Lovebet	Philippines	Sheffield United	Union Standard Group	Australia
Chelsea	Yokohama Tyres	Japan	Southampton	LD Sports	China
Crystal Palace	ManBetX	Philippines	Tottenham Hotspur	AIA	Hong Kong
Everton	SportPesa	Kenya	Watford	Sportsbet.io	Curacao
Leicester City	King Power	Thailand	West Ham United	Betway	Malta
Liverpool	Standard Chartered	United Kingdom	Wolverhampton Wanderers	ManBetX	Philippines

Having sold live exclusivity of the Premier League to Sky since its inception in 1992, it was not until the 2007-08 to 2009-10 cycle that the League guaranteed to prevent one buyer from acquiring all matches, following pressure from the European Commission to rein in Sky's dominance over the domestic league.

For the 2019-20 to 2021-22 cycle, a total of 200 live matches per season split into seven different packages were made available in the domestic broadcast rights invitation to tender, up from 168 per season in the previous cycle.

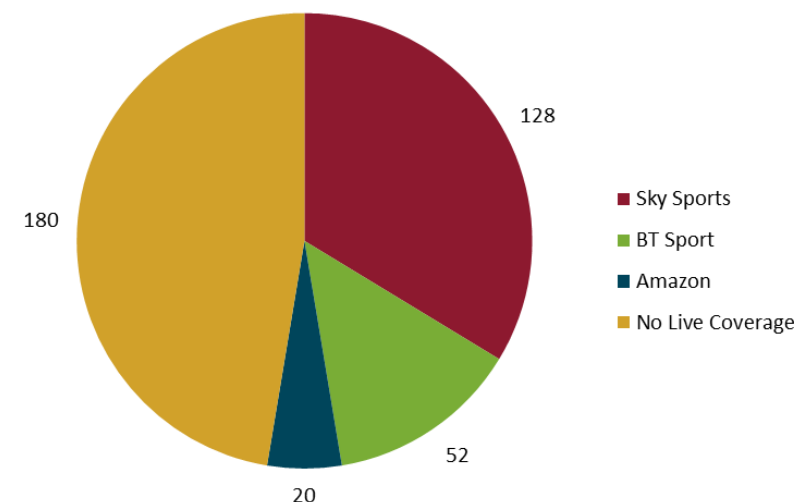
Despite offering a larger number of games to consumers, the Premier League actually experienced a decline in the money raised from the sale of domestic rights. Sky acquired packages B, C, D and E in UK for a total of £3.58 billion (\$4.95 billion). The three-year deal will see Sky show 128 matches at Saturday tea-time and evening, every match played in Sunday afternoon slots, and all Monday and Friday night matches.

Fellow incumbent BT Sport picked up two packages, comprising a total of 52 games per season from 2019-20 onwards, for £975 million (\$1.35 billion) over three years.

Amazon, the online retail giant, secured rights to 20 matches per season played across a Bank Holiday weekend and one midweek fixture programme, along with weekly highlights to be shown throughout the season on Amazon Prime Video streaming service.

While the Premier League will face criticism for a drop in domestic rights value, executives from the English top flight and its clubs will believe that they have succeeded in laying the foundations for a more competitive environment for the next rights auction, while also being able to experiment with an OTT offering.

Premier League games shown live domestically per season



History of live Premier League coverage in the United Kingdom

Seasons	Sky	Others				Total
1992–1997	60	–				60
1997–2001	60					60
2001–2004	110					110
2004–2007	138					138
2007–2009	96	Setanta	42	–		138
2009–2010	96	ESPN	42			138
2010–2013	115	ESPN	23			138
2013–2016	116	BT Sport	38			154
2016–2019	126		42			168
2019–2022	128		52	Amazon	20	200



Owner:
Maxim Demin

Chairman
Jeff Mostyn

Head Coach
Eddie Howe

Stadium
Vitality Stadium

Capacity:
11,329

Best League Finish:
9th (2016-17)

Number of Sponsors:
26

Sponsorship Revenue (estimated):
\$18,330,000

About the Club:

The club was first formed in 1890 under the name Boscombe St. Johns Institute FC, only changing to its current name in 1972. The Cherries remain the biggest overachievers in modern English soccer, achieving unparalleled success over the last decade.

At the end of the first Premier League season (1992-93) Bournemouth sat 17th in League Division Two, then the third division of English football. Their journey since has been quite extraordinary, having been forced into administration in 2009, which saw the club only just cling onto their league status, finishing 21st in League Two. Since then the club has achieved three promotions and achieved their maiden entry into the Premier League at the start of the 2015-16 season, after winning the Championship title.

Front-of-shirt & Sleeve sponsor:
M88

Kit Supplier:
Umbro

Sleeve Sponsor:
Mansion

Official Partners:

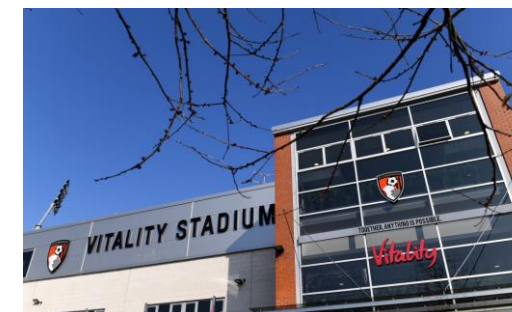
Bournemouth University, Vitality, Strategic Solutions, Bluebird Coaches, Abacus, Barclays, Bournemouth & Poole College, CMP UK, IT Support Business, PRC Streamline Taxis, Teamsjobs, Village Hotel and Yellow Buses

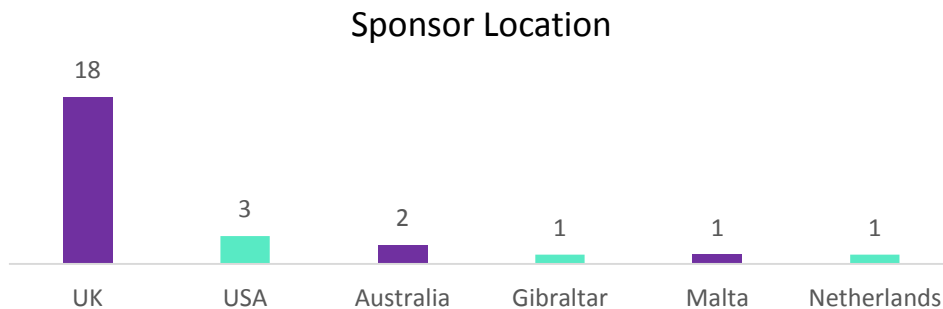
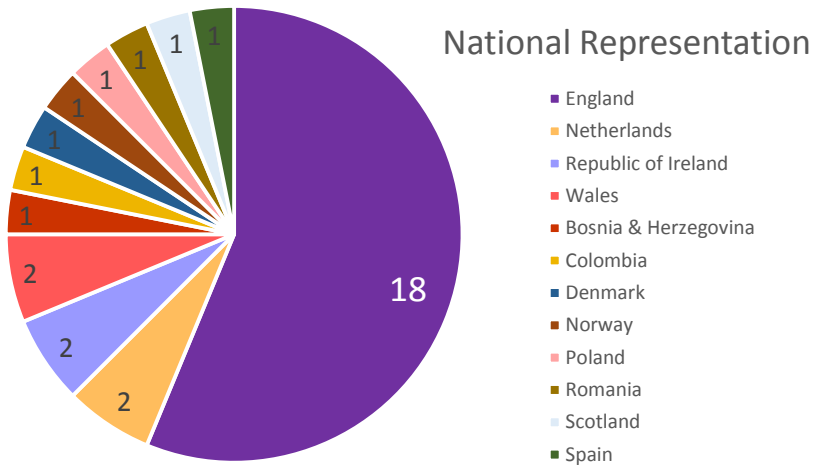
Official Corporate Supporters & Suppliers:

AECC University College, Cedar Group, Colmar Construction, Heineken, Speedy Marquee, Usana, Westover Group, Catapult, Musco Lighting and Alan Thomas Insurance Group



Callum Wilson





- The Bournemouth squad is mostly made up of domestic players, with 56.25% of its current squad English and an overall 71.88% deriving from British heritage. All but one, Jefferson Lerma of Colombia, was born inside European borders.
- Their reliance on domestic talent also runs into their commercial outlook, with 69.26% of its sponsors being based in Britain. The club's small stature, in comparison to the rest of the league, means that they have not attracted the same number of foreign brands as partners as some of its peers.
- The club has partners in 14 different sectors, with financial services accounting for the highest number of deals.



Summer Transfer Market

INS:

Philip Billing from Huddersfield Town - \$18.25m

Lloyd Kelly from Bristol City - \$15.82m

Jack Stacey from Luton Town - \$4.87m

Total Spend - \$38,940,000

OUTS:

Connor Mahoney to Millwall – Undisclosed

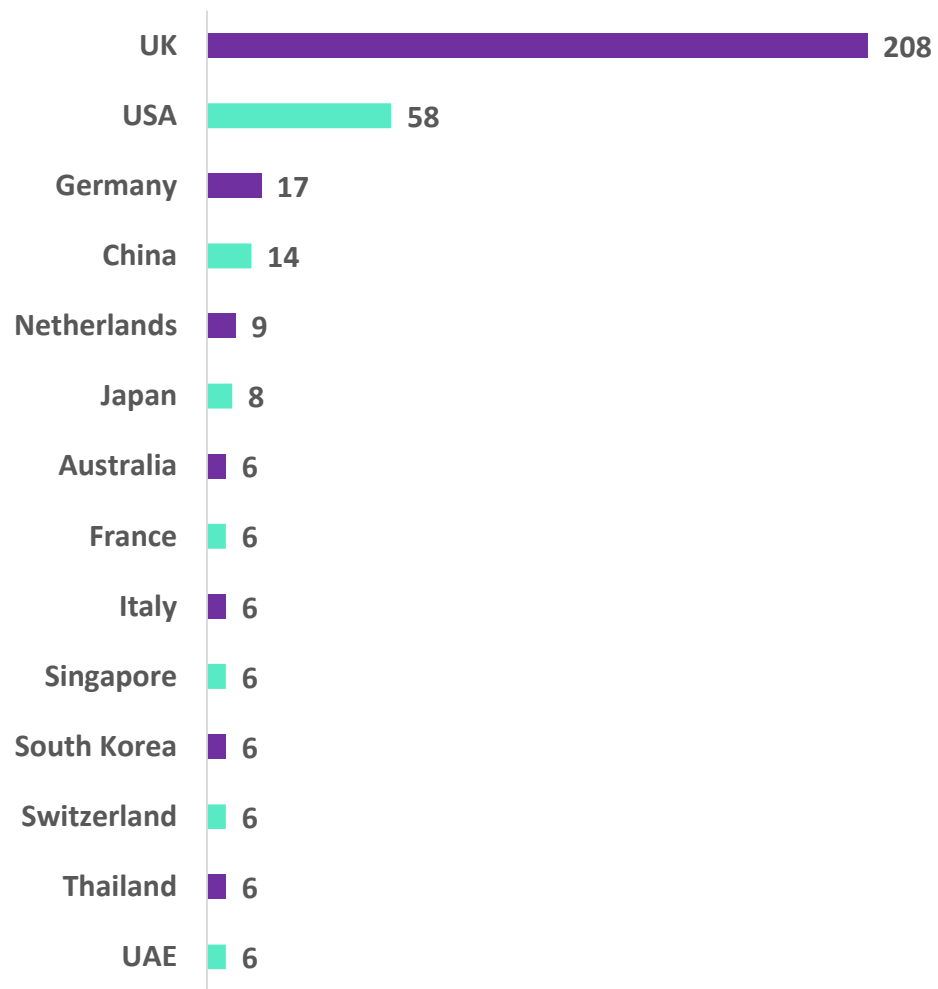
Tyrone Mings to Aston Villa - \$24,34m

Lys Mousset to Sheffield United - \$13.49m

Marc Pugh to Queens Park Rangers - \$0

Total Player Income - \$37,830,000

Top Sponsor Locations



Whilst much is made about the increasing percentage of clubs choosing to align with Asian brands for their front-of-shirt sponsorship, overall the Premier League retains a high percentage of domestic brand support. Of the 378 brands affiliated with the league, 208 are based in the UK, making for a market share of 55.03%.

While UK based brands still lead the way, the growth in the Premier League's appeal internationally means that many more international brands are utilising the reach of the Premier League as a means of promoting their businesses, both domestically in their own market as well as internationally. Where restrictions exist, brands will use the marketing platform offered by the Premier League to circumvent those restrictions and laws in their own country, as evidenced by the gambling brands from China who are barred from advertising domestically, so are able to use the league to reach huge audiences watching at home.

While the Premier League has significant reach in many territories, the unique make up of the players competing within the league also plays a significant role in attracting brand support. By aligning themselves with a particular player or groups of players, brands are able to attract fans to their brand by building on the cultural links and similarities between the foreign imports and the fans back home.

A total of 46 different nations are represented by partner brands in the Premier League.

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