

Formula1® in 2017

Global fan insight into the world's
largest annual sporting series
(2005–2017)

The Fans' Report

May 2017

motorsport

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Foreword

Jean Todt
President, Fédération Internationale de l'Automobile

Dear friends,

Formula One is a sport that incites deep passions – in its heroic drivers, in the teams and their extraordinary engineering expertise and in the selfless commitment of the volunteers and officials who ensure fairness and safety at motor sport events around the world. However, for me, it is the passion of F1's fans that is often most inspiring aspect of our sport.

Formula One's fans are among the most knowledgeable in all sport and their strong commitment to F1 is revealed in the survey you hold in your hands. It is a document that not only reveals a thorough understanding of our sport but also a deep desire for it to continue to set the pace in terms of technology and on-track drama. It also reveals a number of important facts.

Firstly, it samples a comparatively young demographic and the fact that Formula One continues to attract new fans is enormously encouraging. In recent years the FIA has expended a huge amount of effort in constructing a clear pathway to the top levels of motorsport. This been achieved through the establishment of Formula 3 and Formula 4, and most recently, Formula 2. However, the process of building the next generation of stars only works if the end point is something to truly aspire to. A vibrant Formula One championship is essential in providing that inspiration.

The second point the survey reveals to me is a general air of optimism about Formula One's future. Again, this is very gratifying to note.

Our sport is an enormously complex and costly endeavour. These two aspects often create barriers to competition and the FIA, in concert with the sport's stakeholders, has been at the forefront of trying to create fair and open competition. This is chiefly achieved by trying to reduce the cost of competition, which is still far too high. We have made significant progress in this area but there is more to do if we are to build a sustainable and more competitively equitable Formula One.

I believe we are now in the best possible position to meet that challenge. We have seen significant positive change in recent months and working in close collaboration with Formula One's new commercial rights holders and the sport's teams I believe we now have a greater opportunity than ever to build a competitive, sustainable championship and, most importantly, to deliver thrilling Formula One action to the most important constituency of all – its fans.



Executive Summary

Written by: Charles Bradley
Global Editor in Chief, Motorsport Network

In 2017, we are delighted to report that your feedback shows a dramatic improvement in your satisfaction with F1. You have shown us, in record numbers, that there is a wave of renewed optimism for the direction the sport is heading.

In 2015, our Study with the Grand Prix Drivers' Association – you recorded record levels of dissatisfaction and disaffection.

You placed negative statements like boring, corrupt and threatened high up in your list of F1 descriptions and less than 7% of you viewed the sport as being in better health than five years previously, and you told us that F1's status as the perceived pinnacle of motorsport had fallen to an all-time low.

Your feedback has shown that Formula 1 is an increasingly media-reliant sport and while you are prepared to pay nearly 10% more to go to races less than a quarter of you have attended a race in the past year.

While you believed that F1 had great foundations on which to build; the sport needed to make changes. Your feedback this year shows that F1 is heading in the right direction, but there is still work to do to satisfy how, when and how much F1 you consume. Specifically, you have told us that F1 needs to consider the impact of Pay TV F1 coverage on your ability to follow the sport you love.

You have told us clearly that you want to watch Formula 1 live in all its glory via television or online streaming. The latter is clearly a big opportunity for F1 to increase the number of you viewing great racing.

Between 2015 and 2017 many more of you believe that F1 has returned to its place as the pinnacle of motorsport, it features the world's best drivers competing in the most advanced machinery. The changes you demanded in 2015 have been heard and

implemented by the FIA and have rightly positioned drivers back at the heart of an increasingly physically-demanding sport.

While you tell us that you love Formula 1 as a sport first; your support of Ferrari as F1's favourite team has grown around the world since 2015. Its support is now more than twice that of your second favourite team, Mercedes AMG F1.

In terms of the drivers both Lewis Hamilton and Fernando Alonso have enjoyed strong increases in popularity since 2015 and you now see them as clearly F1's two most popular stars – despite Fernando's difficult time on-track over the past 2 years.

Once again in 2017 you have shown us that you are purists, who love real racing and that you don't want gimmicks like sprinkler systems, reverse grids, success ballast nor rapidly-degrading tyres to artificially spice up racing. But you do want F1's rule-makers to reconsider a return to tyre competition, in-race refueling, the return of V8 engines, the introduction of a team budget cap and allowing independent teams to buy and run customer cars.

In summary, the feedback of your opinions is simple...

You want exciting racing among the best drivers, in the fastest, most advanced cars at the best circuits delivered live and uninterrupted via free-to-air television or online streaming, 20 times a year.



Methodology

Written by: Nigel Geach
SVP Motorsport, Nielsen Sports

Nielsen Sports is delighted to have once again worked with Motorsport.com in engaging with Formula 1 fans and providing a platform for them to make their views heard.

The fans are a key part of what makes F1 so special, and understanding their perspectives is crucial in helping to shape the future of the sport.

The 2017 Global F1 Fan Survey was created and translated into 15 languages and hosted via a common, multi-lingual website at www.f1survey.motorsport.com. Over 215,000 fans, from over 190 countries shared their feedback over a 19-day period following the launch at the season-opening Australian GP.

The willingness of the sport to open itself up to the views of its fans and their willingness to engage and respond is unique in terms of both scale and frequency. Capturing feedback from such a large and diverse fan base, for the second time in less than three years, is true testament to the sport and its willingness to put the fans at the heart of future development. By eclipsing the response

in 2015, this latest report represents the most comprehensive global survey ever conducted among F1 fans.

The value of engaging and listening to your fans is evident through this process with the considerable positive shifts in perception the sport seen since 2015, with the fans' voice being heard, actions taken and positive change recognized. Being able to leverage the views of F1 fans again in 2017 can only serve to strengthen the sport even further moving forward.



Who Took Part?

Written by: Charles Bradley
Global Editor in Chief, Motorsport Network

The 2017 Global F1 Fan Survey received more feedback from fans than ever before; over 215,000 of you visited the Survey website and nearly 150,000 of you completed all 127 questions in the Study – thank you.

Headlines

- Largest-ever sample of fan feedback: 215,892 total visitors and 148,170 completed responses submitted for analysis
- Youngest-ever sample with 26% of respondents aged < 25
- Increased participation among female fans > 10%
- A sharp increase in response from North, Central & South America
- Senior Executive & Professional audience rises to > 20% of sample
- MotoGP established as next most-followed series among F1 fans

Formula 1 has always aimed to be a truly global sport, and the fact that fans in 194 countries took part is a testament to the sports appeal. In 2017, we heard from a record 148,000 fans worldwide with 95,000 of you living in Europe; 37,000 of you across America and 15,000 of you living in Asia-Pacific. It was a truly worldwide audience of fans. The details of this year's Study compared to previous years are shown in Chart 4.1.

In 2017, we heard from the youngest audience ever and while we couldn't collect responses from fans under the age of 16, we are delighted that for the first time since

the Studies began the average age of fans fell below 36 years old.

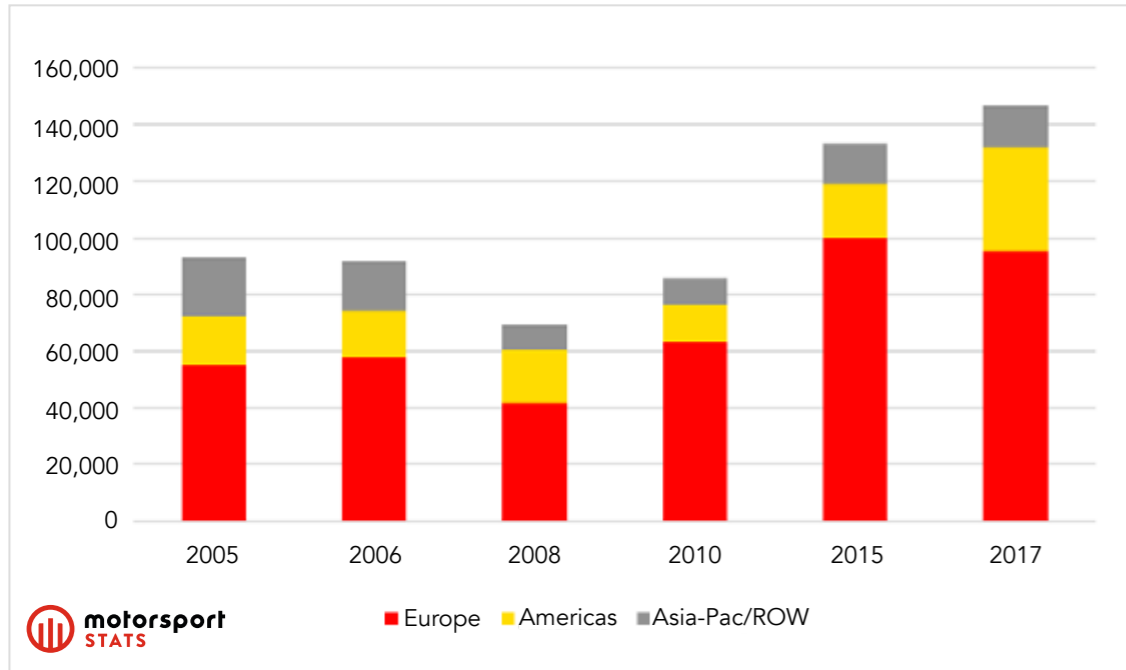
We received responses from more younger fans in Asia-Pacific than in Europe or the Americas (See Chart 4.2).

In 2017, we were delighted to hear from over 14,000 female fans, again the largest number ever.

And your feedback showed that us that while you are F1 fans first and foremost, you continue to follow MotoGP (43.6%) and World Endurance Championship (38.5%) in big numbers.

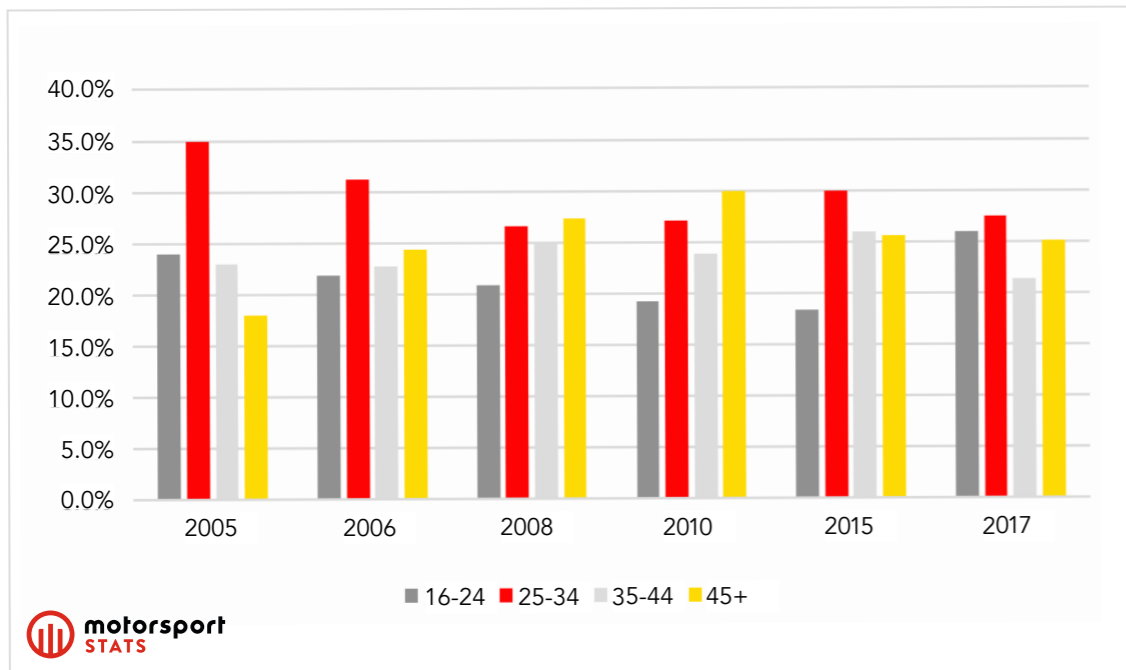


Chart 4.1 | Global Fan Survey Sample (2005-2017)



The 2017 Global Fan Survey received and analysed detailed feedback from Formula 1 fans in 194 countries around the world

Chart 4.2 | Age Profile of Respondents (2005-2017)



The Health of F1

Written by: Jonathan Noble
Group F1 Editor, Motorsport Network

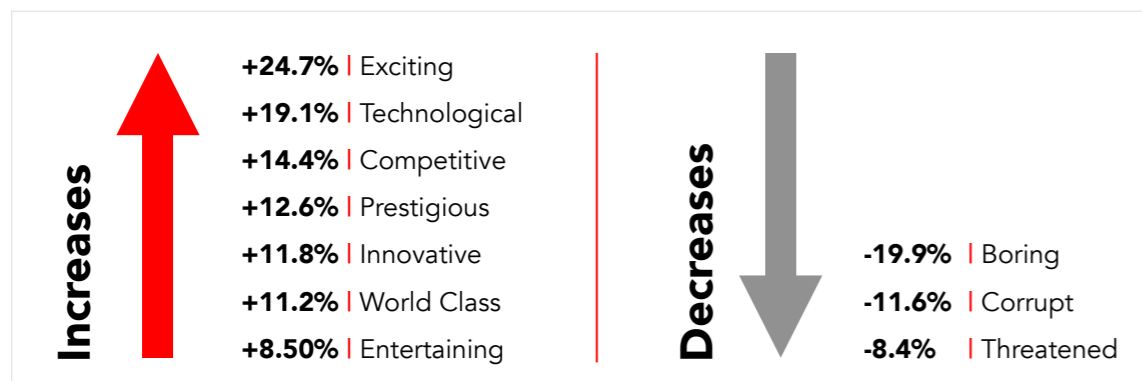
A welcome highlight of 2017 Study is the marked improvement in your perception of Formula 1.

Headlines

- Your feedback in 2015 showed F1 in crisis
- In 2017 you are far more optimistic
- Your descriptions of F1 have improved significantly
- F1 in 2017 is more exciting, competitive and prestigious; it is also less boring, corrupt and threatened
- But you tell us that work is still needed to attract new fans and balance F1's business and sporting interests
- Maintaining F1's status as motorsport's pinnacle in terms of drivers, technology and machinery is critical to you

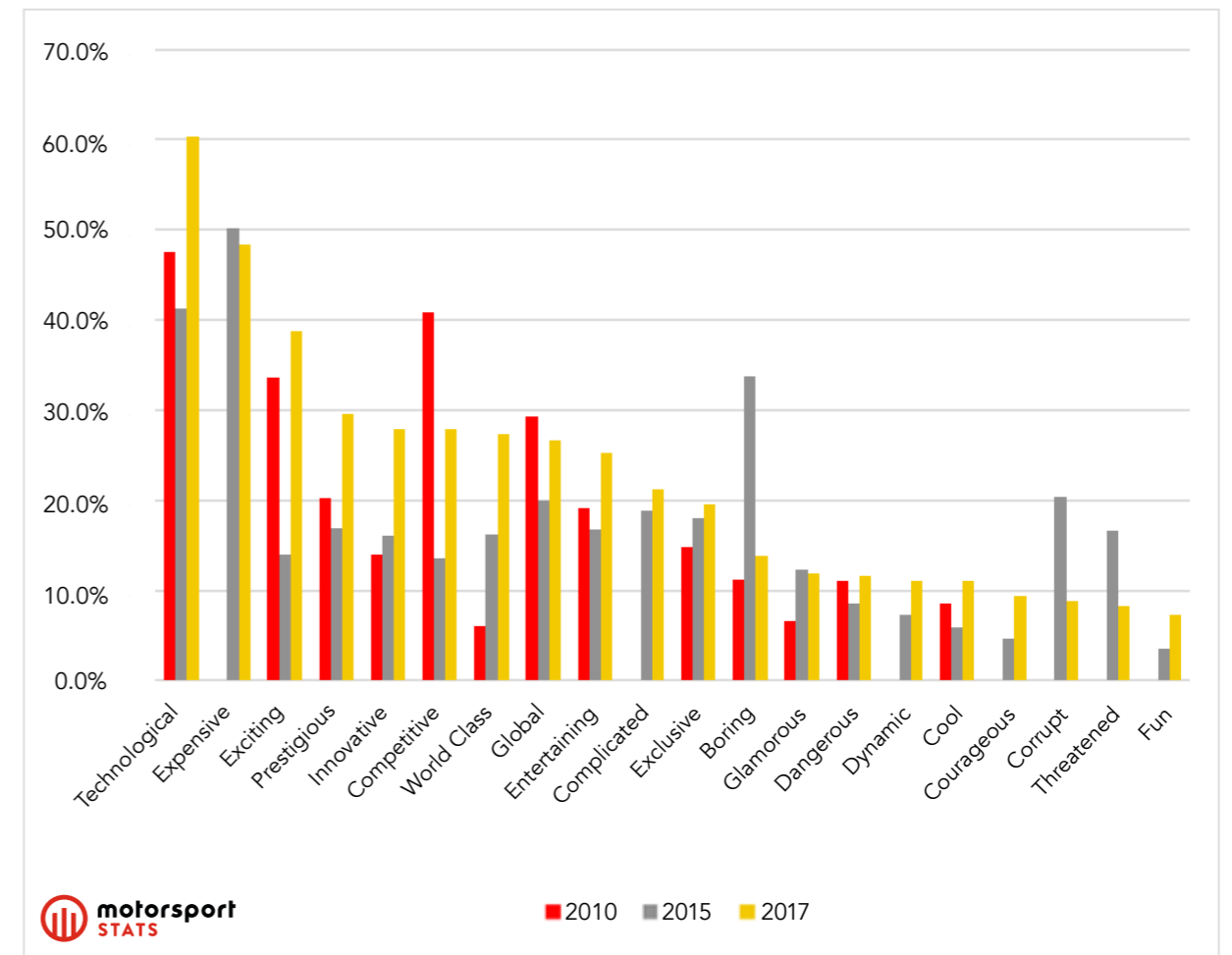
The biggest changes in your opinions about F1 are highlighted in Chart 5.1.

Chart 5.1 | Formula 1 Brand Attribute Changes (2015 v. 2017)



An upsurge in satisfaction and attitudes has been driven by a change of ownership and revised sporting regulations since 2015

Chart 5.2 | Formula 1 Brand Attributes (2010-2017)



The 2017 Study identifies a 'wave of optimism' among fans worldwide.

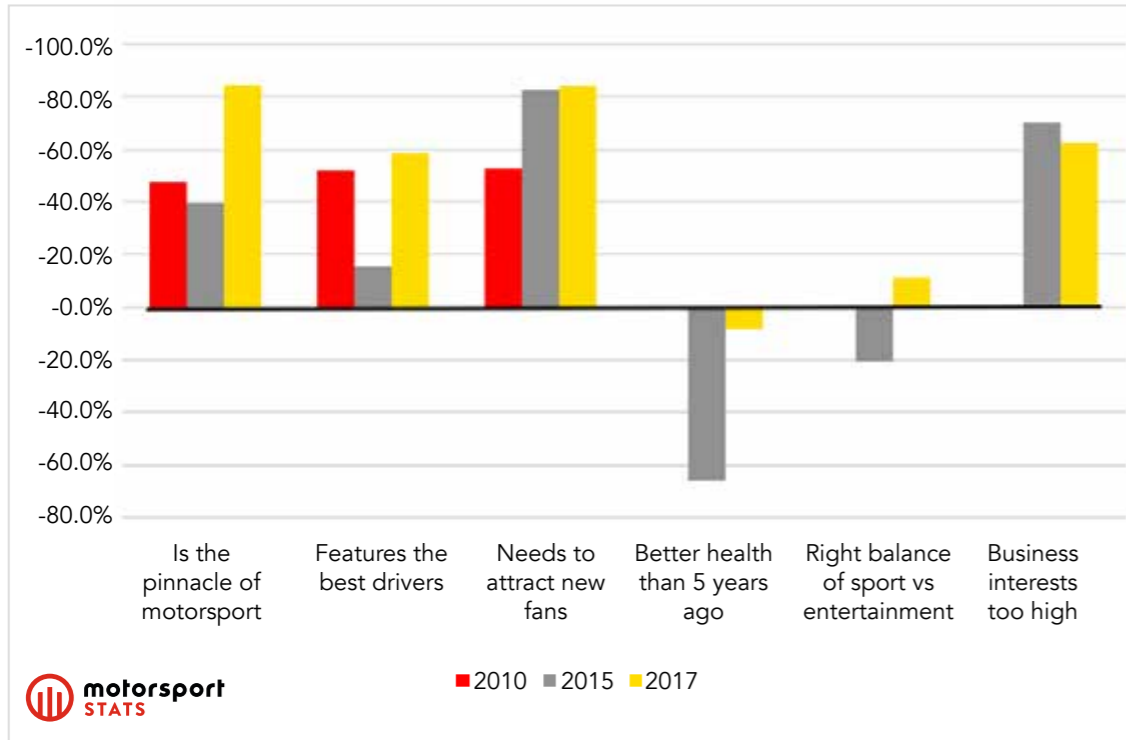
Encouragingly, the trend is most marked among younger fans (See Chart 5.2).

In 2017 you also showed a big increase in the statements...

1. "Formula 1 is the pinnacle of motorsport" (84.2%) – up 44% from 2015.
2. "Features the world's best drivers" (58.5%) – up 41% from 2015.

However, you told us that F1 still needs to work harder to attract new fans, and it needs to balance its sporting and business interests (See Chart 5.3).

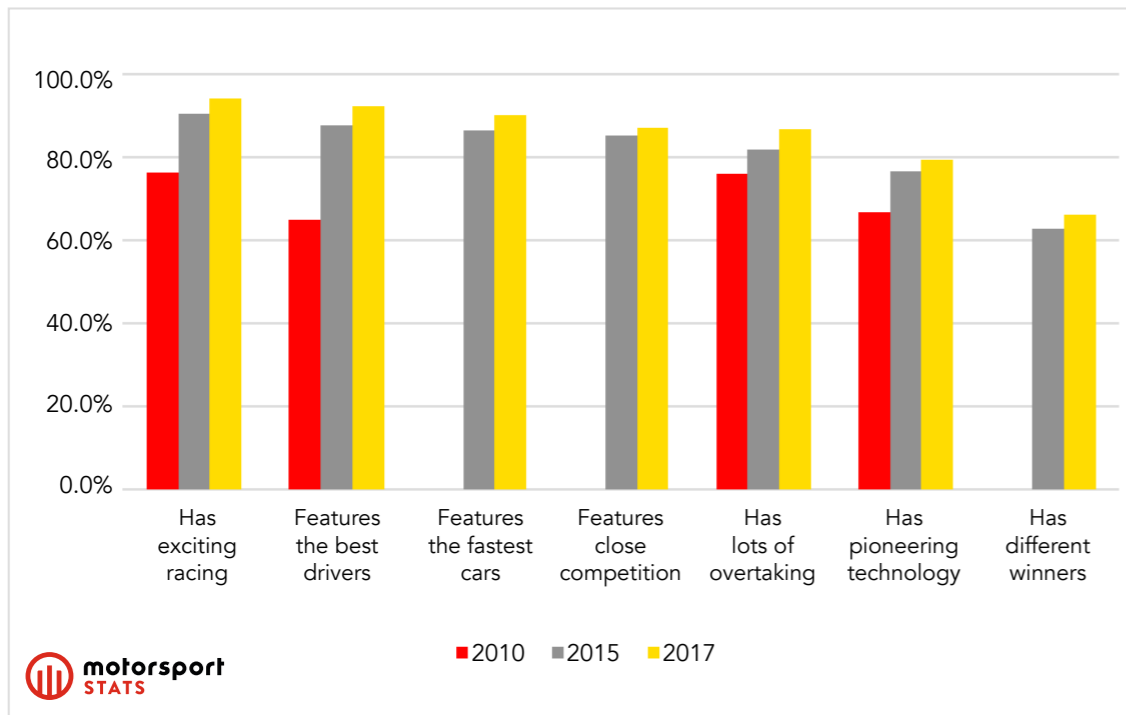
Chart 5.3 | Formula 1 Fans Levels of Net Agreement (2010-2017)



You provide us with a clear picture of what is needed to maximise the appeal of F1...

To deliver exciting racing among the best drivers, in the fastest machinery, featuring pioneering technology delivering close competition and lots of overtaking (See Chart 5.4).

Chart 5.4 | Key Features of Formula 1 (2010-2017)



The F1 Season

Written by: Damien Smith
European Editor in Chief, Motorsport Network

Formula 1 is an increasingly 'media-driven' sport, with less than a quarter of you, the most avid fans, attending a race each year.

Headlines

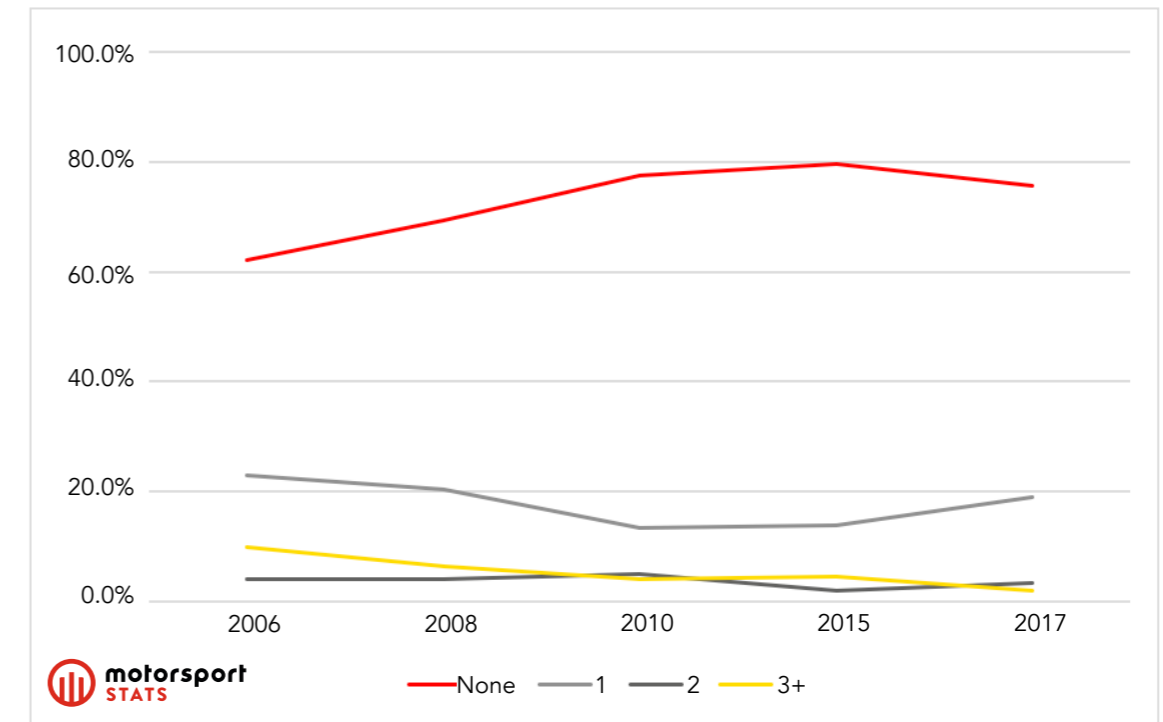
- Less than a quarter of you attended a race in 2016
- You want a 19-21 F1 race season
- Four GPs stand out as critical: Monaco, Monza, Silverstone & Spa
- You want to see Germany & France back on the F1 calendar
- You have quickly grown to love the races in Abu Dhabi & Singapore; especially younger fans
- Good vantage points, a strong support programme & Pitlane / Paddock access are key factors influencing your decision to attend
- You are happy to pay 16% more for tickets in 2017, but GP prices continue to outstrip your desire to pay

Less than 25% of you attended a Grand Prix in 2016.

For younger fans this figure was even higher (80%+); those of you living in Asia-Pacific were more likely to attend a race than those living in Europe and the Americas (See Chart 6.1).

Fan feedback shows the importance of good viewing, pitlane & paddock access, together with a strong race support programme to drive attendance

Chart 6.1 | GP Race Attendance Per Annum (2006-2017)



Since 2006, you have consistently called for a 19-21 F1 season (See Chart 6.2).

Chart 6.2 | Preferred Number of GPs Per Season (2006-2017)

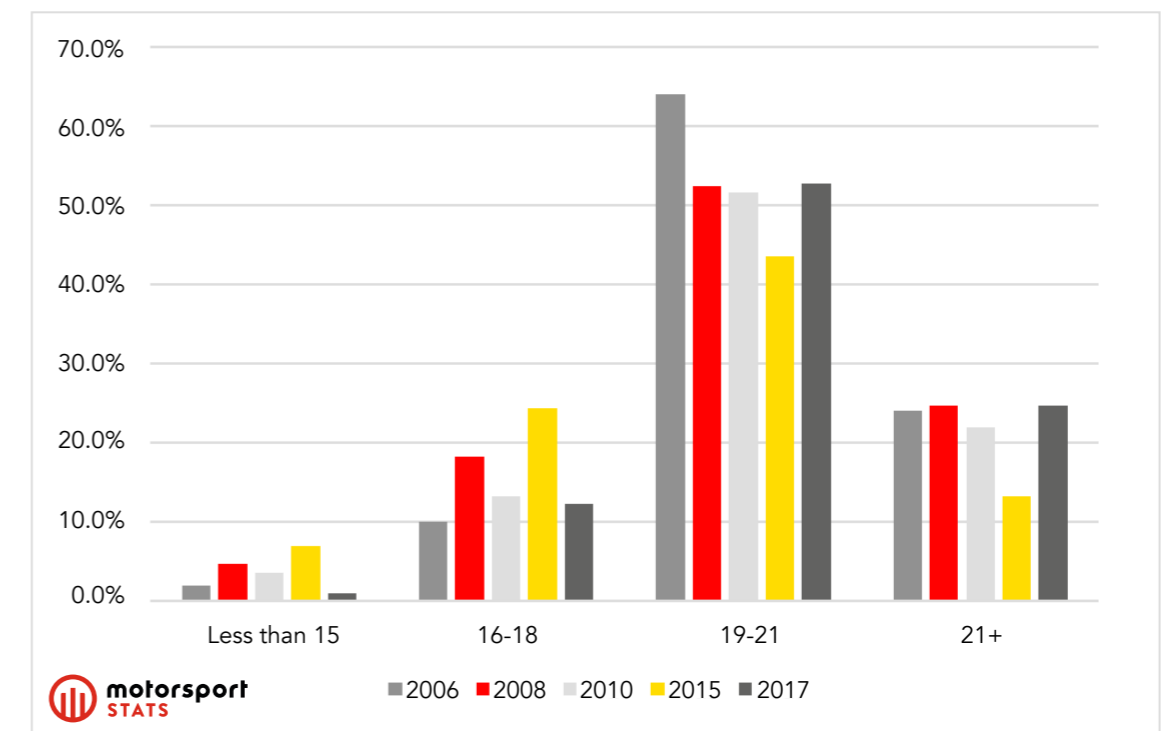
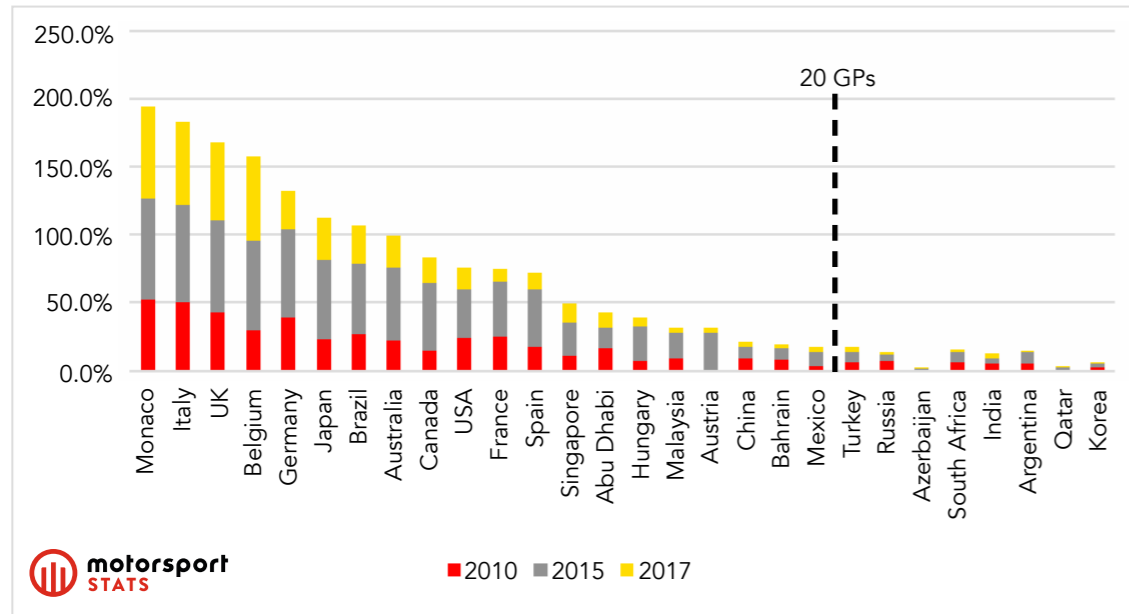


Chart 6.3 | Fans' Ranking of GP Importance (2010-2017)



The Perfect 20

Your feedback since 2010 has allowed us to create a clear picture of the 'perfect' F1 fan season (See Chart 6.3).

- **The Essentials (4):**
Monaco, Monza, Silverstone, Spa
- **The Popular Perennials (6):**
Australia, Brazil, Canada, Japan, Spain, USA
- **The New Favourites (2):**
Abu Dhabi, Singapore
- **The Notable Absentees (2):**
Germany, France

Beyond these 14 races the picture is less clear-cut, with fans, understandably voting for their 'local' races. Events in Austria, Malaysia, Turkey, Hungary and Mexico gained between 4-7% popularity with those in Russia, China, Bahrain and Azerbaijan scoring between 1-3%.

You also gave us a clear idea of what inspires you to attend a race and we have now shared this with Grand Prix promoters across the world (See Chart 6.4).

To further help F1 and the GP promoters, you have provided us with some guidelines on the prices you are willing to pay to attend a race. Currently only the Malaysian GP is offering fans a 3-day ticket at prices you indicate as 'Good Value' (See Charts 6.4 & 6.5).

Good Value Average
0.9% increase to \$96.99

Reasonable Value Average
12.1% increase to \$120.72

Expensive Average
16.5% increase to \$163.15

Too Expensive Average
27.1% increase to \$208.17



Chart 6.4 | F1 Fan Pricing (2015-2017)

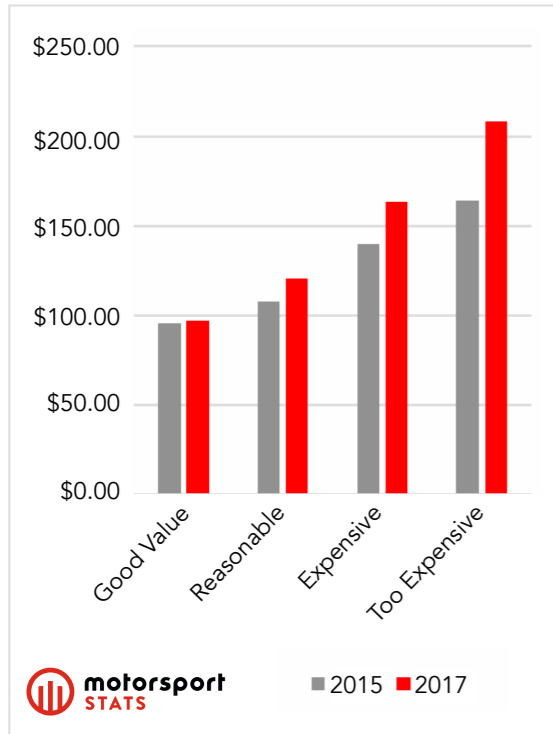
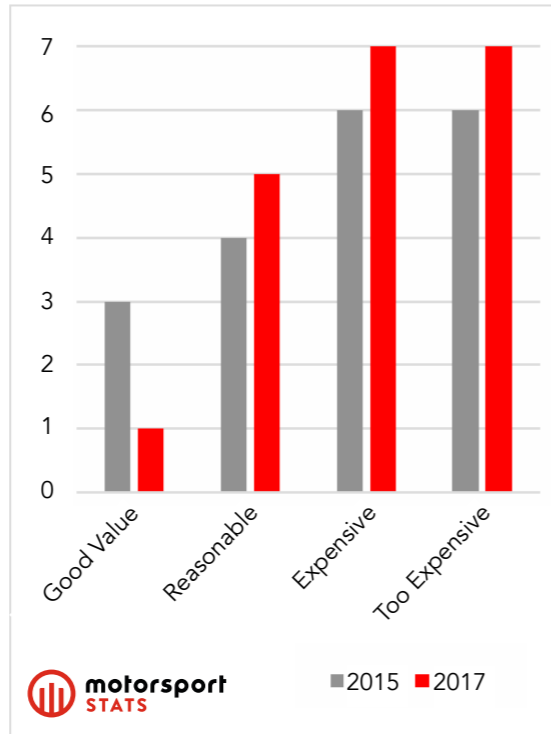
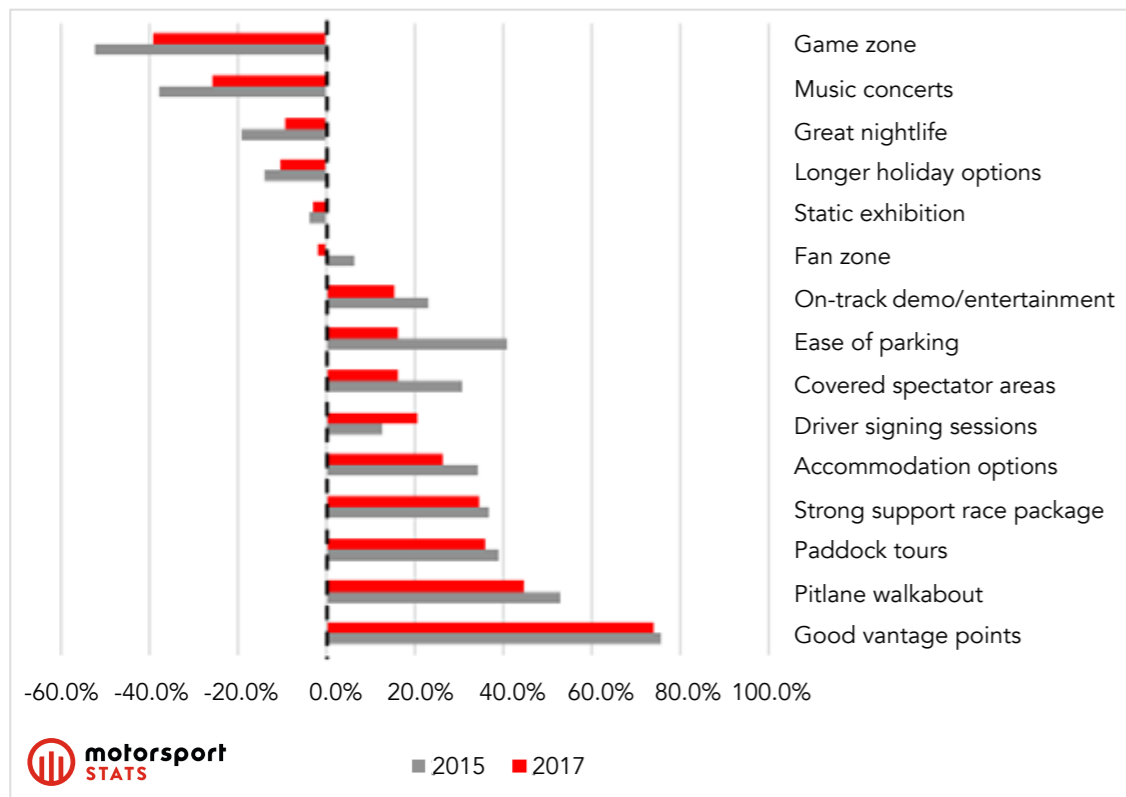


Chart 6.5 | F1 Admission Pricing (2015-2017)



You also gave us a clear idea of what inspires you to attend a race and we have now shared this with Grand Prix promoters across the world (See Chart 6.6).

Chart 6.6 | GP Features Influencing Attendance (2015-2017)



How You Follow F1

Written by: Anthony Rowlinson
 Editorial Director, Motorsport Network

TV and dedicated motorsport websites are the most important ways for you to follow Formula 1.

Headlines

- TV and dedicated motorsport websites dominate your F1 consumption
- General sports websites, newspapers and radio have fallen significantly since 2015
- While you are using Social Media more, your use is well below that of TV and specialist websites
- Over 90% of you want to watch every race live on TV, or via live streamed coverage online
- The growth of Pay TV is reducing the number of fans who can follow F1 live; those of you watching in Europe are the most affected
- Overall 40% of you miss races due them being broadcast on Pay TV only

Over F1 race weekends, nearly two-thirds of you use TV and specialist motorsport websites on a frequent basis to get your F1 news and information. This is more than double the usage of any other media (See Chart 7.1).

While TV remains a key media for you – especially over a GP weekend – your feedback shows a steady decline in TV watching since 2005. This decline has accelerated since 2010.

Fans and particularly younger fans are now regularly using Social Media to follow F1, but the increase in usage has been gradual rather than spectacular.

Clearly, showing your love for F1, over 80% of you expect to watch more than 13 GPs each year (See Chart 7.2).

Formula 1 fans displayed a clear preference for viewing races in full, live on TV

Chart 7.1 | Formula 1 Media Consumption Habits (2005-2017)

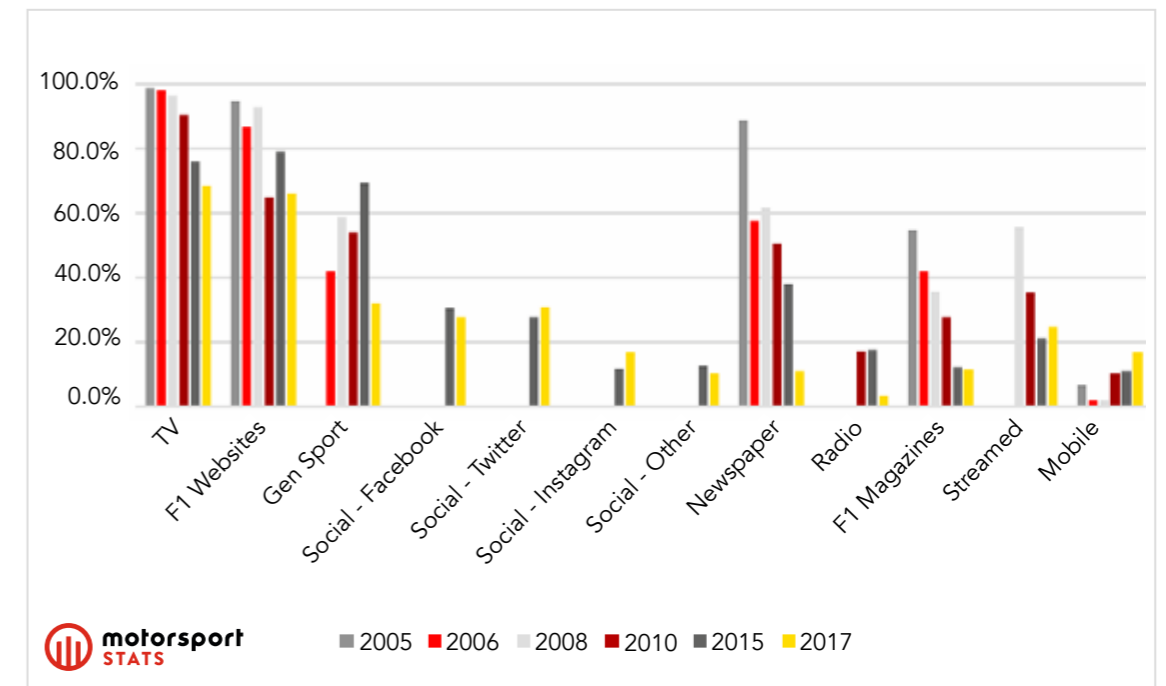
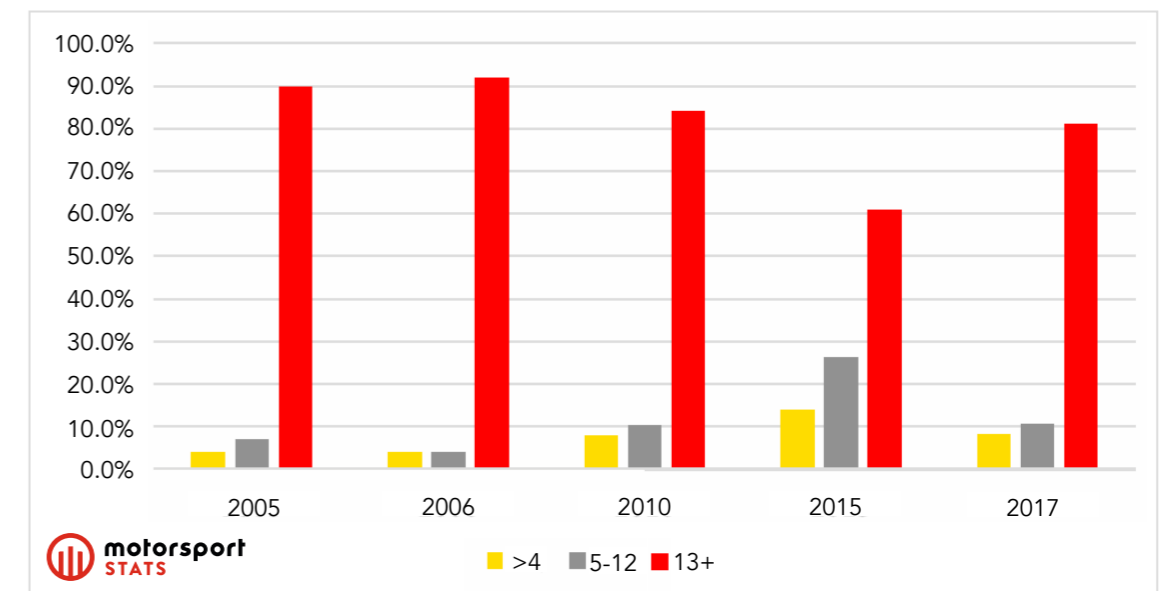
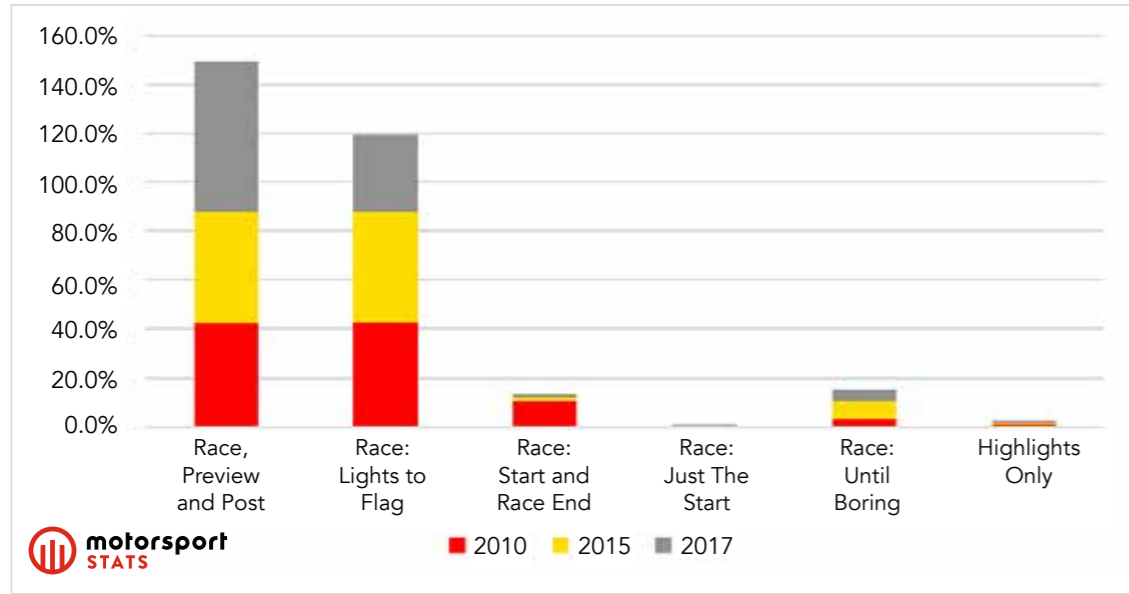


Chart 7.2 | Number of GPs Watched by Season (2005-2017)



Furthermore over 90% of you plan to watch an entire F1 race, with 60% of you also watching the pre & post-race analysis (See Chart 7.3).

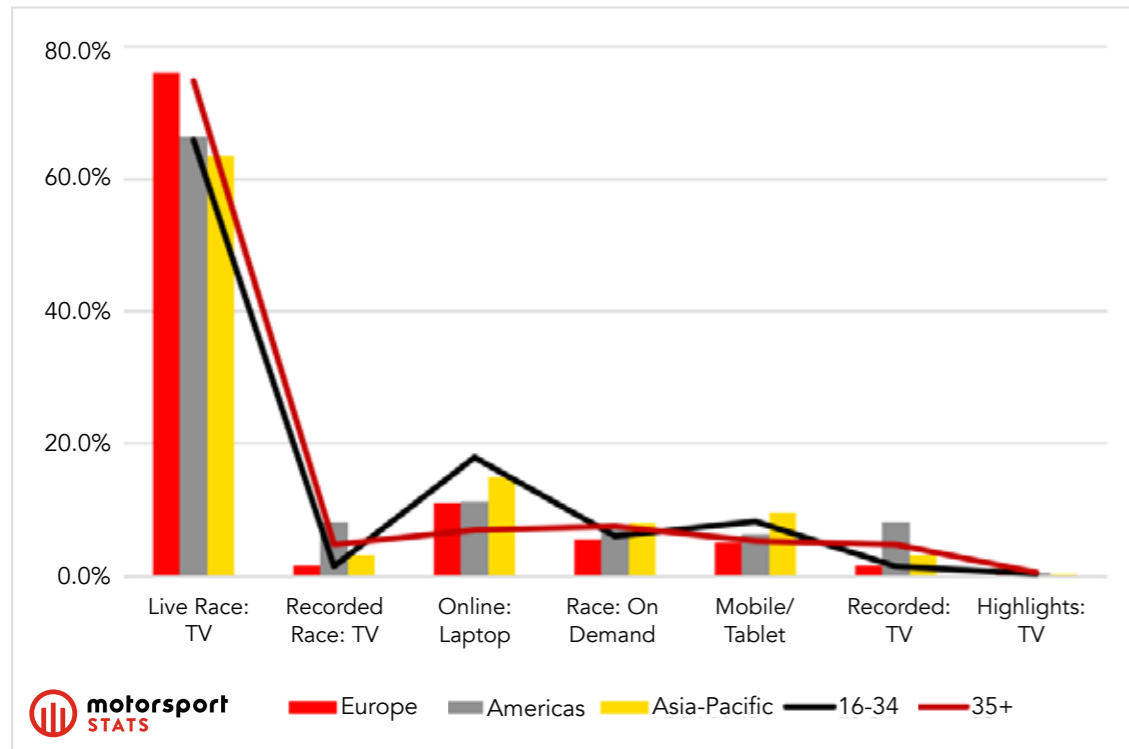
Chart 7.3 | Quantity of GP Broadcast Viewed (2010-2017)



In 2017 you showed us that you want to continue watching F1 live and in full on TV (See Chart 7.4).

Although, understandably, due to local race times more fans in Asia and the Americas wanted to watch pre-recorded full race highlights. There was also a big increase in the number of younger fans who wanted to watch F1 via online streaming.

Chart 7.4 | Fans' Future Viewing Preferences (2017)



The Impact of Pay TV

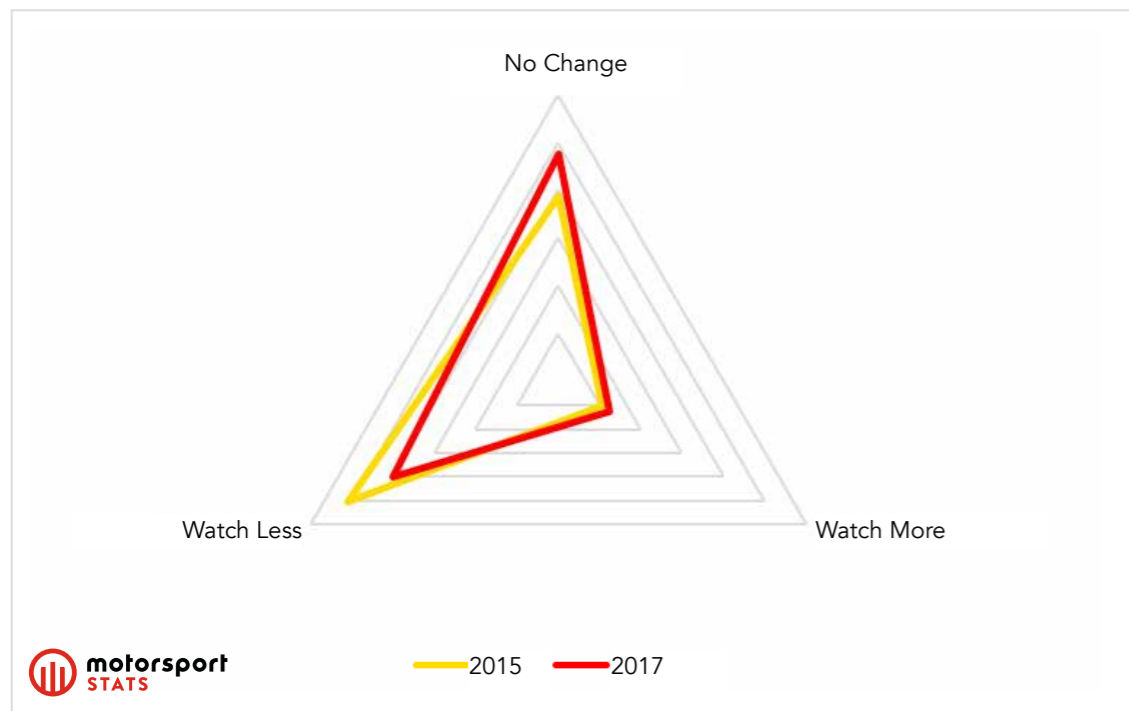
Overall the number of you watching F1 on TV has declined by nearly 25% since 2010.

Our study in 2015 showed that nearly half of you were either missing entire races or only viewing highlights when live races were limited to Pay TV.

In 2017 you have told us that Pay TV only broadcasting continues to be a big obstacle to your viewing, over 40% of you are watching less F1 due to the impact of Pay TV.

Fans living in Europe are most affected (See Chart 7.5).

Chart 7.5 | Impact of Pay TV On Formula 1 Viewing (2015-2017)



Teams and Drivers

Written by: Edd Straw
Editor in Chief, Autosport

Your support of Lewis and Fernando clearly establishes them as Formula 1's most popular drivers. Love for Ferrari across the world continues to grow.

Headlines

- Lewis's and Fernando's popularity among fans has increased sharply
- Lewis is especially popular among fans in Europe & Americas
- Kimi's & Sebastian's popularity remains unchanged
- Ferrari reinforce its position as your #1 team worldwide
- Ferrari is ranked #1 in all regions & in 21 of the top 25 markets
- Mercedes' on-track success and driver line-up has driven big gains in fans support

Lewis's popularity among fans has doubled since 2015 and in 2017 over 20% of you support him as your favourite driver. This level of following among fans has not been seen since your support for Michael Schumacher over a decade ago.

In addition to Lewis, the other driver enjoying a significant jump in popularity is Fernando Alonso; whose support rose from 12.7% to 18.3% placing him a clear 2nd behind Lewis. Both of these drivers appear to have been the biggest beneficiaries following Jenson and Nico's departure from F1 at the end of 2016.

Kimi's popularity remains almost unchanged in third, helped by the support of F1's

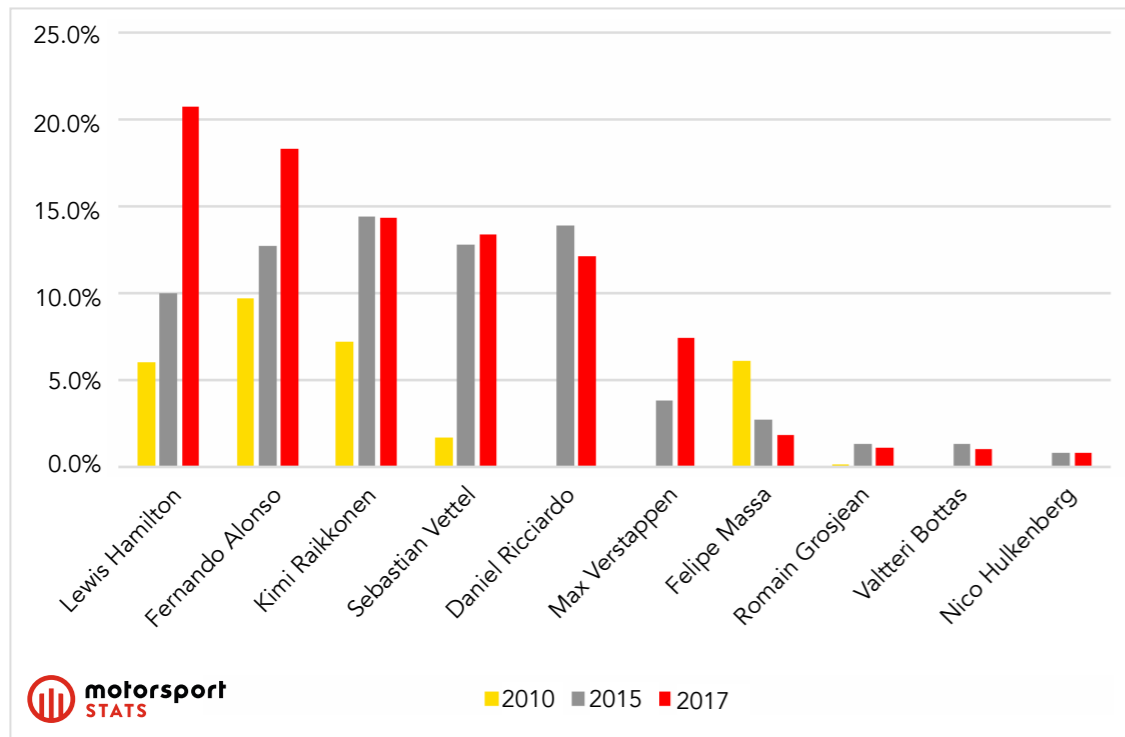
most patriotic fans – over 6,000 fans from Finland took part in the Survey and more than 85% of you put Kimi at #1. Sebastian Vettel made small gains, especially among younger fans lifting him to 4th overall with Daniel Ricciardo falling to 5th.

Not surprisingly, more and more of you of 'falling in love' with Max Verstappen, his popularity among fans doubled since 2015 making him your 6th favourite driver. Max also enjoys huge support in The Netherlands with over 80% of Dutch fans placing him as their #1 (See Chart 8.1).

Interestingly, Max's support among 45+ year old fans is significantly higher than among those of you aged 16-24.



Chart 8.1 | Formula 1 Driver Ranking (2010-2017)



Lewis Hamilton's popularity has doubled since 2015; he now commands a level of global fan support not seen since that enjoyed by the great Michael Schumacher



Ferrari's global popularity increases across all regions, genders, interest levels and age groups

Ferrari have strengthened its position as your favourite F1 team, nearly one-third of you ranked them as your #1. Your support of Ferrari is nearly double that of their nearest competitor – the fast-rising Mercedes AMG F1 team.

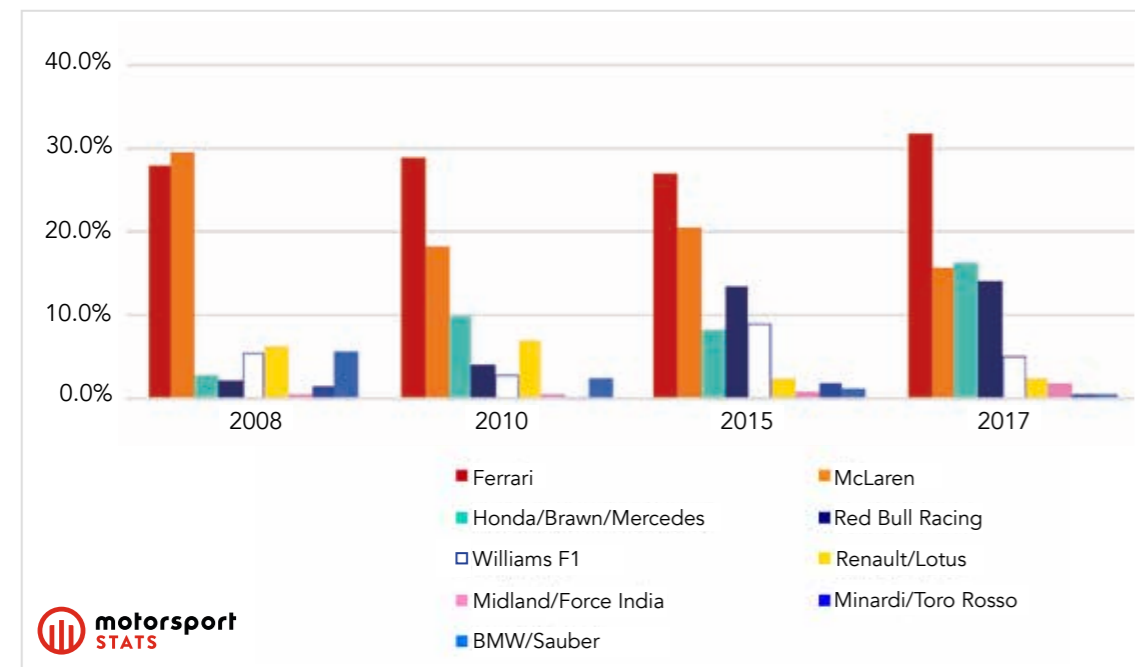
Your support for Mercedes has nearly doubled in the past 2 years lifting the team from 4th to 2nd overall behind Ferrari. The combination of on-track success and its driver line-up have been strong contributing factors.

McLaren's on-track difficulties since the last Study in 2015 has seen its popularity fall by 5% to 15.8%, placing them just behind Mercedes but ahead of Red Bull Racing as your 3rd favourite team.

Red Bull's popularity among fans continues to rise with 14% of you ranking them as your favourite team; placing them 4th overall, followed by Williams in 5th and Renault in 6th.

Sahara Force India's support has doubled since the last study and now stands at 1.8% in 7th, just ahead of Haas F1, who backed by strong US support enter for the first time in 8th with 1.6% support.

Chart 8.2 | Formula 1 Team Ranking (2008-2017)



Your Views on Future Changes

Written by: *Stuart Codling*
Executive Editor, Motorsport Network

Your feedback in previous studies has allowed Formula 1 to consider and introduce sporting changes.

Headlines

- Your feedback in 2010 and 2015 has led directly to improvements in F1
 - You're purists and don't want 'artificial' gimmicks to spice up racing
 - You like the current F1 weekend schedule
 - But you want F1 rule-makers to consider:
 - Reintroduce tyre competition
 - Return to V8 engines
 - Introduce Budget Caps
 - Reintroduce in-race refuelling
 - Allow teams buy and run customer cars
 - Award points for Fastest Lap
-

In 2010, your feedback acted as a catalyst for...

- Revising the F1 Points System and increasing the points difference between 1st and 2nd place
- Fast-tracking the introduction of HD TV coverage
- The development and introduction of Drag Reduction System to increase in-race overtaking



Formula 1 fans firmly reject any artificial 'gimmicks' to enhance racing. Fans reinforce calls from 2015 to re-establish tyre competition, refuelling and introduce team budget caps

In 2015, your feedback provided F1 with a very timely Crisis Report, it detailed your growing dissatisfaction with the way the sport was heading. It provided a clear mandate for change, that feedback has been listened to and your responses in 2017 show that you are happy with many of the results - increased cornering speeds, faster cars, the best drivers, pioneering technology and a reduction on driver aids.

The results of this study provide a timely and welcome vote of approval from you for those changes.

With your input, Formula 1 in 2017 is in a far healthier position than it was two years ago. In 2017 we asked you for your opinion on a number of potential sporting changes for consideration.

The table shows your level of agreement against several potential F1 changes (See Chart 9.1).

Once again you have told us decisively that you don't want any 'artificial' changes to spice up racing. So, a resounding NO from you for:

- sprinkler systems
- success ballast
- reverse grids, or
- rapidly de-grading tyres

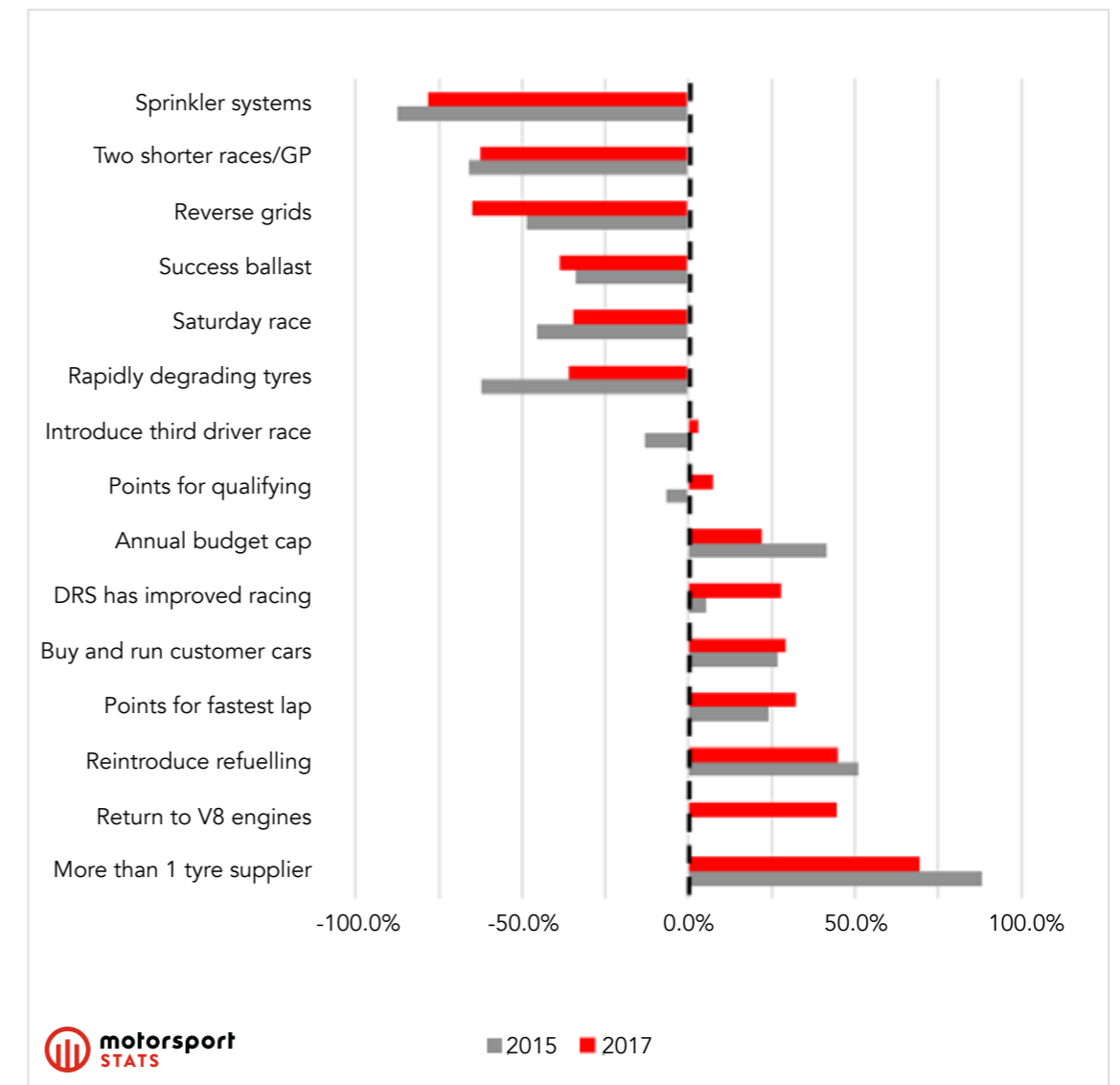
Similarly, you have told us, very clearly, that you are happy with the current format of the GP weekend, so NO to:

- Saturday races
- 3rd (Reserve) driver races, and
- Two shorter races at GP

The areas you identified for consideration and review remain consistent with your feedback in 2015, so YES to:

- Annual Team Budget Caps to be agreed and policed
- Allowing independent teams to purchase and compete in 'customer cars'
- Awarding Championship Points for Fastest Lap
- A return to in-race refueling
- The return to V8 engines
- A return to tyre competition

Chart 9.1 | Fans' Preference for Formula 1 Sporting Changes (2015-2017)



F1 Merchandise and Gaming

Written by: Ben Anderson
Grand Prix Editor, Autosport

For the first time in 2017, we asked you about how much you spent on Formula 1 merchandise and the popularity of motorsport computer gaming.

Headlines

- You collectively spent \$8.8m on F1 merchandise in 2016
- On average, you spent \$155 mostly through online and event sales
- Over 50% of you regularly play motorsport computer games
- Among 16-24 year olds regular gaming rises to over 80%
- Most of you are playing in single player mode on games consoles
- The *Codemasters F1 Series* is the most played and your favourite titles

Merchandising

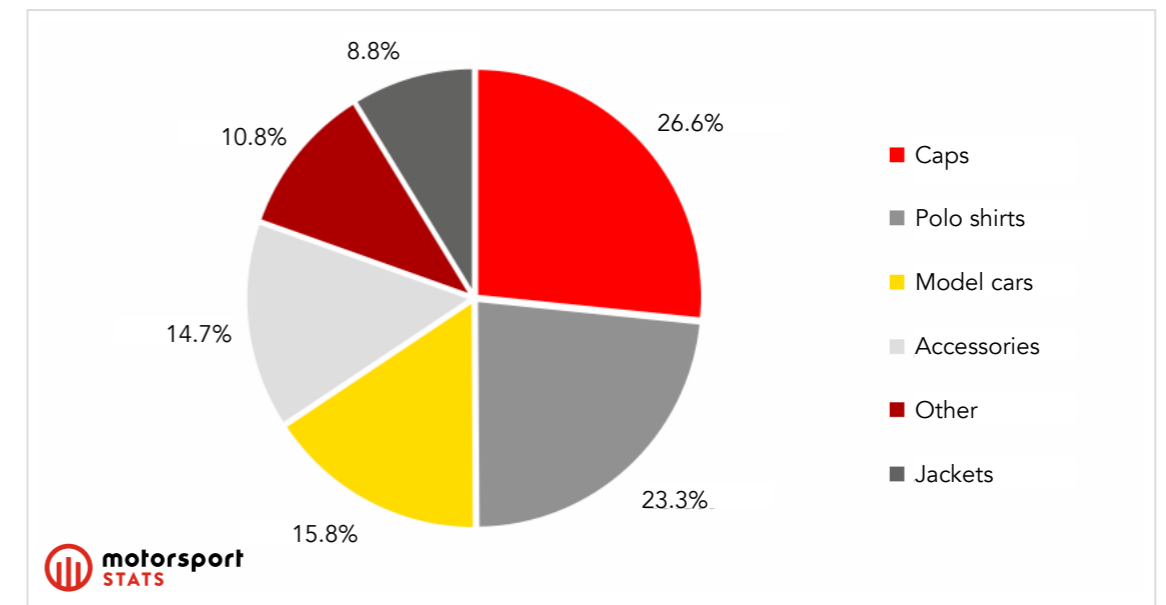
Your feedback in 2017 showed that 38.5% of you, 57,000 individuals, purchased F1 merchandise in the past year. Your total spend on merchandise exceeded \$8.8m; equating to an average spend of \$154.83.

You spent money equally on driver and team merchandise, with Team & Driver Caps, Polo Shirts and Replica Cars the most popular items (See Chart 10.1).

Nearly half of you bought your merchandise online, making it the biggest single sales channel.

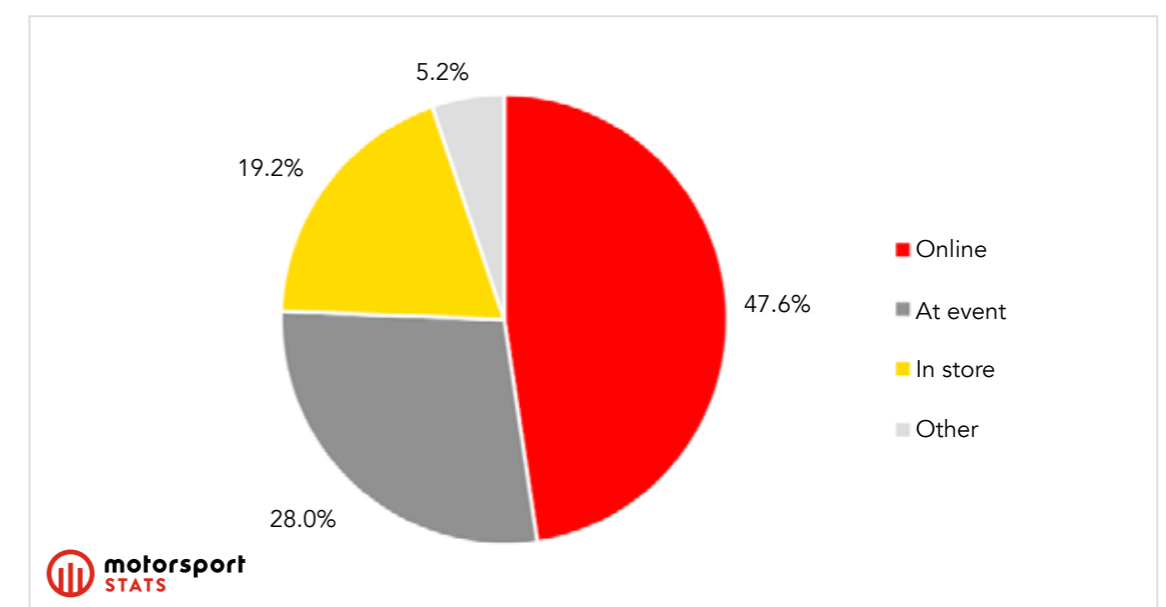
And while less than a quarter of you attended a race in 2016, 55% of you who did go bought merchandise while you were there; making race retail the 2nd most valuable channel for F1 merchandise sales (See Chart 10.2).

Chart 10.1 | Formula 1 Merchandise Sales by Product Category (2017)



Survey respondents collectively spent over \$8.8m on F1 merchandise, an average of \$155 per head

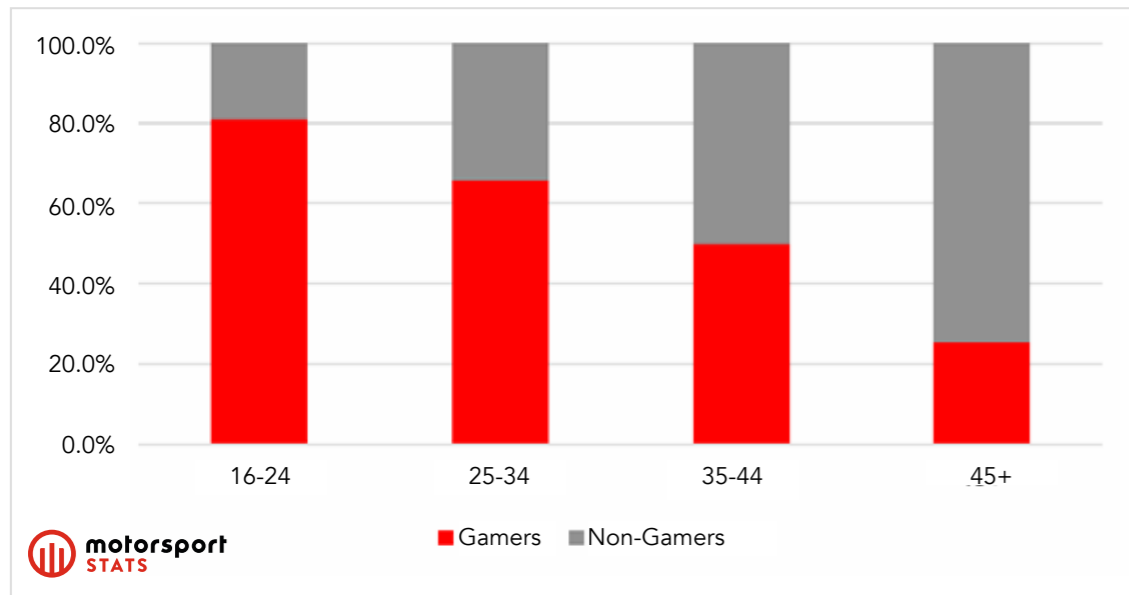
Chart 10.2 | Formula 1 Merchandise Sales by Channel (2017)



Gaming

Your feedback in 2017 shows that over half of you regularly play motorsport themed computer games. This figure increases significantly among younger fans, with over 80% of you aged between 16-24 regularly gaming (See Chart 10.3).

Chart 10.3 | Motorsport Gaming Audience by Age Profile (2017)



Most of you are enjoying games via a console (X-Box, Playstation, Nintendo) in a single player mode (See Charts 10.4 & 10.5).

Chart 10.4 | Motorsport Gaming by Platform (2017)

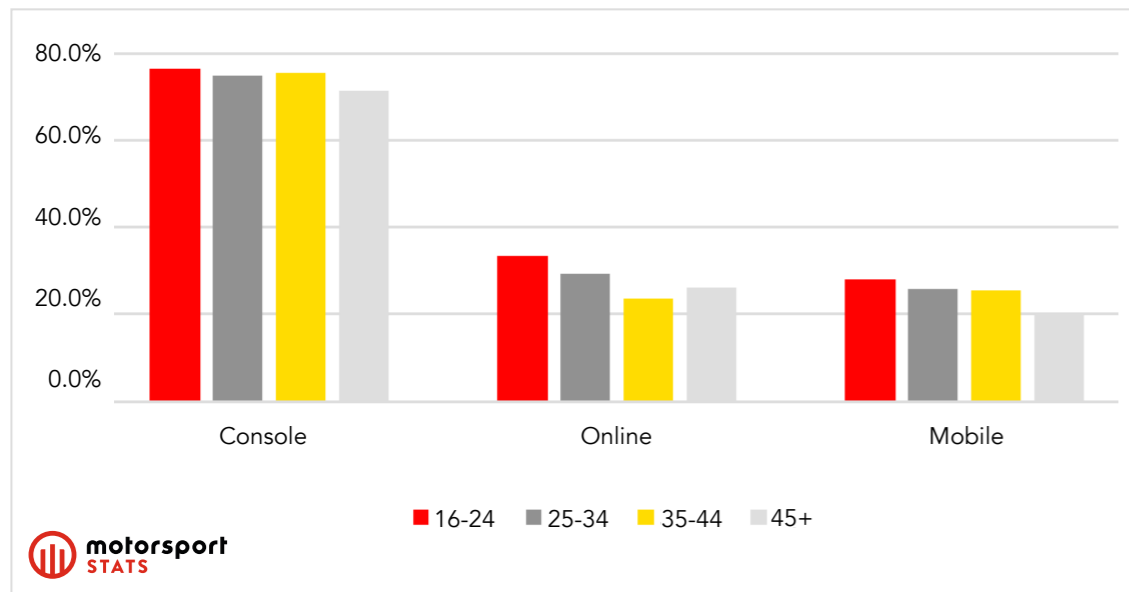
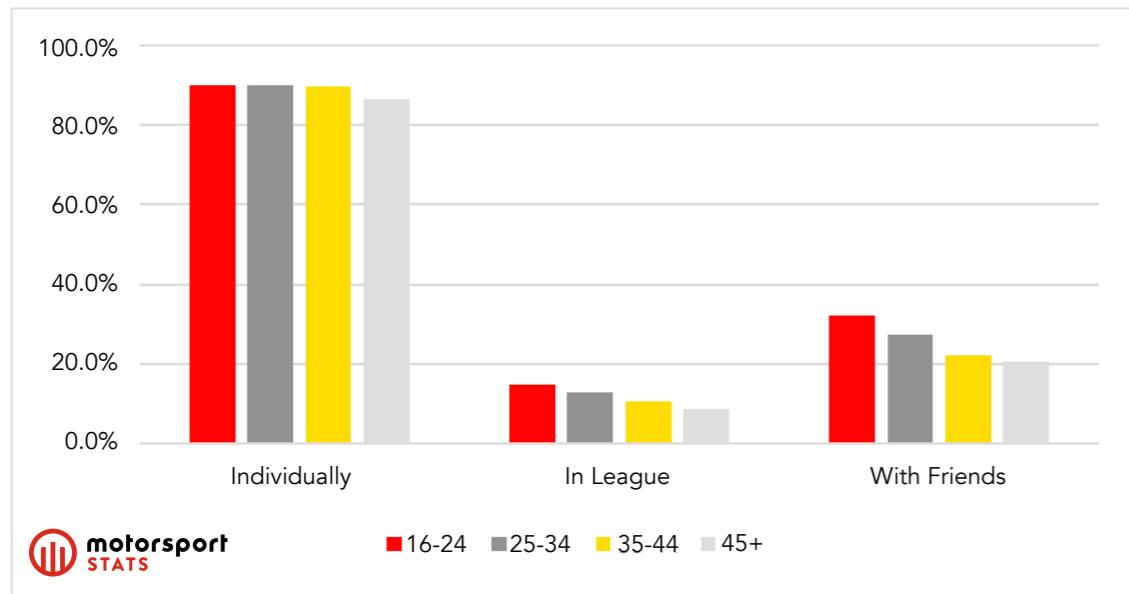


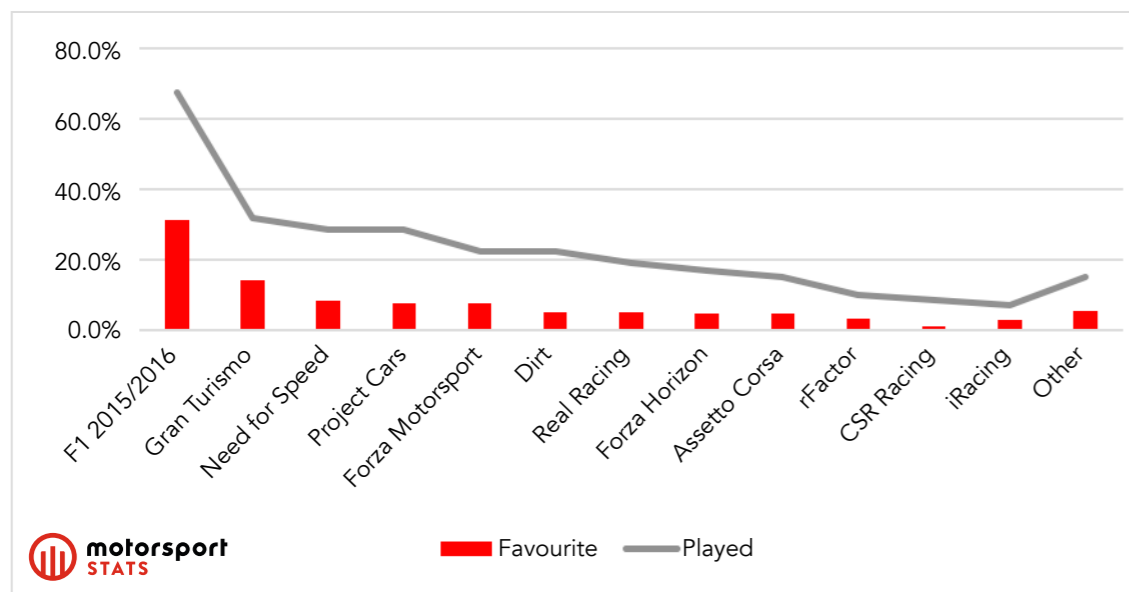
Chart 10.5 | Gaming Environment/Player-Mode (2017)



Among the 16-24 age range, over 80% of fans are regularly playing motorsport themed games

The official F1-licensed series created by Codemasters is clearly your most played and favourite game. Among younger fans over 75% of you aged 16-24 are regularly playing. Globally the game is more than three times more popular than any other series (See Chart 10.6).

Chart 10.6 | Formula 1 Gaming Usage and Ranking (2017)



2017 Survey Key Statistics

The 2017 Global F1 Fan Survey was commissioned, created, governed and delivered by Motorsport Network between March and May 2017.

The Survey was created and translated into 15 languages and hosted via a common, multi-lingual website at www.f1survey.motorsport.com. Over 215,000 fans, from 194 countries worldwide shared their feedback over a 19-day fieldwork period following the launch at the season-opening Australian GP.

This Study builds on Motorsport Network's previous work with the Grand Prix Drivers Association [GPDA] conducted in May 2015, and is the latest volume in a series of global fan insight programmes first initiated by the FIA in 2005.

With a total of 148,170 completed individual responses collected from fans

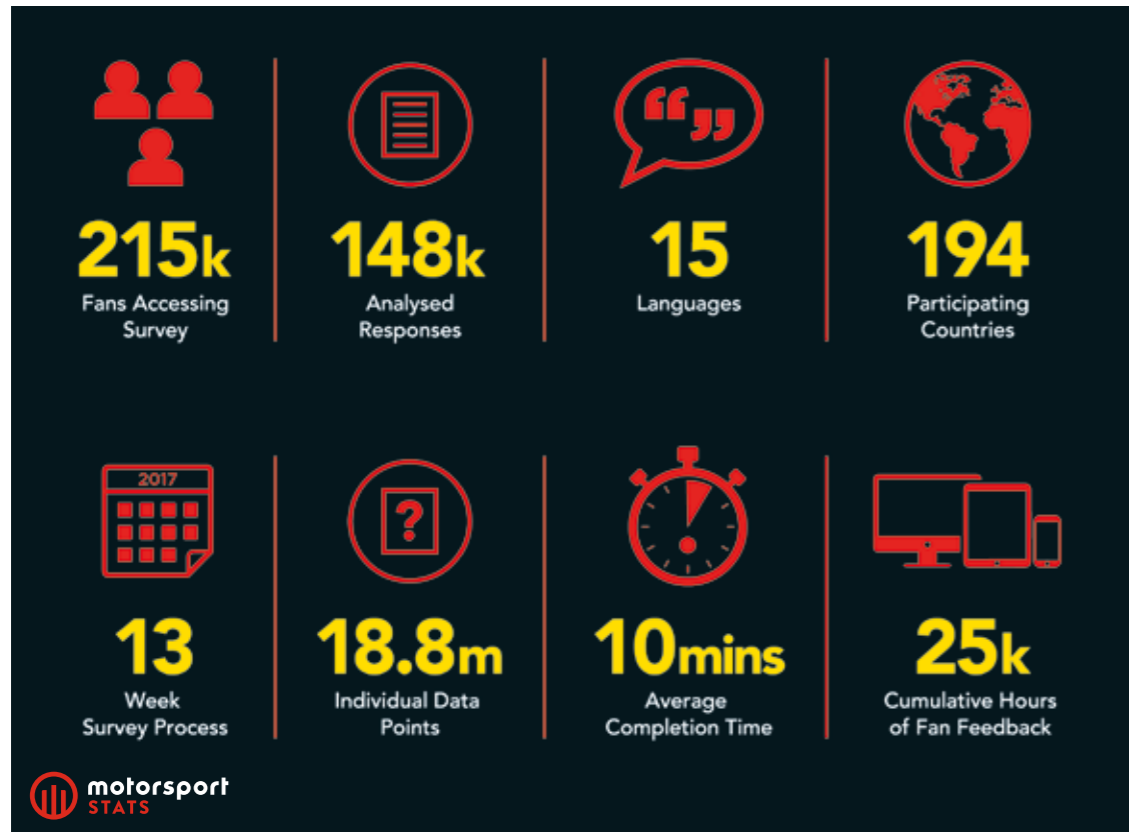
for analysis; this is the largest Study ever conducted in Formula 1.

The Survey questionnaire along with the analysis and interpretation of your responses was conducted by industry experts, Nielsen Sports. The project including the Management, Media, and Fan Reports were planned, coordinated and delivered by MPA Commercial.

Thanks to a more intuitive design the average time it took you to complete the survey was reduced by 15 minutes to a little over 10 minutes.

The whole process from concept to report delivery was completed by Motorsport Network and its partners in just 13 weeks.

Without you and your continuing support none of this would have been achievable – thank you.



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