Formula 1® in 2017

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

Management Report

May 2017
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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 motorsport events around the world. However, for me, it is the passion of F1’s fans that is often the 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 has 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.
In 2017, we are delighted to report a dramatic improvement in Formula 1 fan satisfaction and a wave of renewed optimism among the sport’s highly-engaged global audience.

In 2015, our Study – partnered with the Grand Prix Drivers’ Association – documented record levels of dissatisfaction and disaffection among F1’s global fanbase.

Negative brand descriptors such as boring, corrupt and threatened featured prominently in fan feedback. Less than 7% of fans viewed the sport as being in better health than five years previously, and F1’s status as the perceived pinnacle of motorsport had fallen to an all-time low.

The findings of this and previous studies show F1 has strong foundations on which to build; fans now believe that the sport does many things right.

With minor amendments – some of which are already in the pipeline – fans are happy with the format, quantity and structure of the current F1 calendar.

Formula 1 is an increasingly media-reliant sport. Despite fans’ willingness to pay an average 8% more per annum to attend races, less than 25% of its most-committed fans attend races each year.

While brand health indicators point to a strong recovery from where it was in 2015, F1 still has much work to do to satisfy the consumption demands of its fans. Specifically, F1 needs to address the impact of the growth of Pay TV deals, and strike the right balance between the value and volume impact of paid TV output.

For the future, fans clearly indicate their preference to consume Formula 1 live in all its glory via television or online streaming. The latter is clearly F1’s biggest opportunity to increase the eyeballs on its great racing product.

Increasingly, fans view F1 as the pinnacle of motorsport, featuring the world’s best drivers competing in the most innovative and technologically-advanced machinery. Changes implemented by the FIA since 2015 have rightly positioned drivers back at the heart of a physically challenging sport.

While F1 attracts fans on a non-tribal, sport-first basis, Ferrari’s position as F1’s favourite team has strengthened globally since 2015. Its support is now more than twice that of the second most popular team, Mercedes AMG F1. In the drivers’ standings, both Lewis Hamilton and Fernando Alonso have enjoyed strong gains in popularity since 2015 and are now clearly established as F1’s two most popular stars – despite Alonso’s difficult time on-track since the last study.

Fans show no interest in perceived gimmicks like sprinkler systems, reverse grids, success ballast nor rapidly-degrading tyres to artificially spice up racing. However, results in 2017 reinforce fan opinion from 2015 with fans favouring a return to tyre competition, in-race refuelling, 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 fans’ recipe for future success is simple, if challenging, namely...

**Exciting racing among the best drivers, in the fastest, most technologically-advanced machinery at the best circuits delivered live and uninterrupted via free-to-air television or online streaming, 20 times a year.**
Global F1 Fan Survey 2017 | Executive Summary
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, multilingual website at www.f1survey.motorsport.com. In excess of 215,000 fans, from more than 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 eagerness 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 fans is evident through this process in the considerable positive shifts in perception the sport has seen since 2015, with fans’ voices being heard, actions taken and positive change recognised. Being able to leverage the views of F1 fans again in 2017 can only serve to strengthen the sport even further moving forward.
The F1 Audience

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

The audience completing the 2017 Global Fan Survey is the largest, most balanced and most comprehensive analysed to date.

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

In 2017, we witnessed a welcome shift in audience demographics:

1. Larger sample size for analysis
While research samples in excess of 1,000 respondents are considered statistically robust, an increase in the overall sample to 148,170 exemplifies the desire and dedication of fans to commit significant time and effort to register their opinion on the sport they love.

2. Greater geographic spread
Responses were received from fans in 194 countries worldwide (Note: The United Nations officially recognises 203 countries worldwide) and while the 2017 Study, like all previous F1 surveys, showed a response bias towards European fans, this bias fell to its lowest level ever. Before statistical weighting, European fan responses accounted for 63% of the overall sample compared to over 70% in all previous studies, and nearly 75% in 2015. In parallel, we saw response gains in Asia-Pacific (up to 10% of the global sample) along with a large uplift in response from the Americas, which grew to nearly 25% of total responses in 2017, up from less than 15% historically (See Chart 4.1).
3. Younger Audience
The 2017 Study also attracted the youngest age profile of respondents ever. More than a quarter of fans were aged between 16 and 24. While over 70% of fans have been following the sport for more than 10 years, the average age of respondents fell below 36 for the first time since the studies began over a decade ago. Regionally, Asia-Pacific had the highest percentage of younger fans (16-24) at 29%, and the Americas the lowest with 18.4% (See Chart 4.2).

4. Greater female participation
The 2017 Study attracted responses from over 14,000 female fans – the highest figure ever collected. While responses from female fans accounted for only 10% of the global total, this represents a 50% and 40% uplift respectively on the 2015 and 2010 Studies. Female participation in Europe (11%) and Asia-Pacific (10%) was nearly 50% higher than that recorded in the Americas (7%).
5. More professional

Formula 1 has always sought to attract a professional, executive audience. Occupational analysis in 2017 clearly demonstrates the appeal of the sport among senior decision-makers. For the first time since studies began in 2005, the percentage of responses from senior executives and board directors rose above 10%. When combined with the audience of professionals (lawyers, doctors, dentists, teachers) this element accounted for over 20% of all respondents. F1 continues to attract large numbers of technical specialists (14%) and in 2017 we also witnessed a marked growth in both the student and retired audience, up to 18% and 5% respectively (See Chart 4.3).
In common with previous studies, the 2017 Study attracted the highest level of response from ‘avid’ fans (89.5%). This is not surprising, given that Survey promotion was predominantly featured on motorsport-centric digital and social media platforms and with an average completion time of 10 minutes, which while considerably shorter than previous studies, still required fans to commit significant time to complete.

In a theme that runs through this report, there was a welcome increase in the percentage of fans who viewed F1 as their favourite sport – up by 3% on 2015 to 52.7%. There was also a corresponding fall in the percentage of fans who had previously viewed F1 as their #1 sport, but now followed other sports more actively, down by 6.1% to 7.1%.

In terms of other motorsport series, F1 fans continue to follow MotoGP (43.6%) and the World Endurance Championship (38.5%) in significant numbers; MotoGP also recorded the largest uplift in following from 2015. While interest in predominantly US-based series like IndyCar and NASCAR declined, interest in the FIA-governed Formula E, World Rally and World Rallycross Championships all made gains – in the case of Formula E and WRX, this was particularly strong among the 16-24 age category.

It should be noted, however, that less than half of F1 fans follow any other motorsport series or event (See Chart 4.4).

In 2017, over half of respondents consider Formula 1 as the sport they follow most avidly

**Chart 4.4** Other Motorsport Series Followed (2015-2017)
F1 Brand Health

Written by: Jonathan Noble
Group F1 Editor, Motorsport Network

The most welcome and notable highlight of the 2017 Study is the strong improvement in fans’ perception of Formula 1.

Headlines

- 2015 GPDA/Motorsport.com Study documented a sport in crisis
- 2017 Study records a welcome wave of optimism among fans
- Positive Brand Attributes show strong improvement vs 2015
- 2017 witnessed sharp declines in Negative Attributes
- Fans view sport as far healthier than 2015
- Work 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 fans

In 2015, our Study conducted in association with the GPDA captured fan opinion following a five-year hiatus. The standout feature of the 2015 Study was a sharp decline in fan opinion against a number of key factors spanning both F1 as a sporting spectacle and the sport’s governance.

While the outputs in 2015 were alarming, the timing of the Study was critical for F1. The 2015 Study charted the standing of a sport under threat, disengaged from its global audience, who expressed high levels of dissatisfaction and alienation. Their indicators of dissatisfaction were numerous and uncomplimentary:

- A fall in percentage of fans viewing F1 as the ‘pinnacle of motorsport’
- Less than half the fans believed F1 featured the ‘best drivers’
- Just 7% of fans believed F1 was in better health than 5 years previously
- Over 77% of fans believed F1’s business interests had become too influential
- Sharp increases in negative brand attributes including boring (33.8%) and corrupt (20%) featuring within F1’s Top 5 ‘qualities’
One of the key findings from our 2017 Study is a sharp and welcome reversal over the
2015 findings.

The 2017 Study identifies a ‘wave of optimism’ among F1 spectators worldwide – an
upsurge in fan satisfaction and attitudes driven by a change of ownership and revised
sporting regulations since 2015.

**F1 Brand Attributes**

The marked improvement in fan opinion is most clearly exemplified by the ranking of
fans’ key F1 descriptors between 2015 and 2017. Employing an identical questionnaire
technique and list of options, fans were asked to indicate the five most accurate
descriptors of Formula 1. The change from 2015 to 2017 is marked (See Charts 5.1 & 5.2).

Encouragingly, this trend was most marked in the 16-24 age group, where Competitive,
Entertaining, Exciting & Prestigious scored noticeably higher and Boring, Corrupt &
Threatened significantly lower.

**Chart 5.1** | Formula 1 Brand Attributes (2010-2017)
Alongside the very positive changes in F1’s key descriptors, in 2017 we witnessed a strong upsurge in net agreement among fans that...

1. “F1 is the pinnacle of motorsport” (84.2%) – up 44% from 2015. This phrase scored 87.1% agreement among the 16-24 age group
2. “Features the world’s best drivers” (58.5%) – up 41% from 2015. This phrase scored 61.6% agreement among 16-24 year olds

However, while overall fan satisfaction has improved markedly since 2015, respondents continue to voice concerns regarding the sport’s need to attract new fans, and its ability to balance sporting and business interests.

Furthermore, while there is a significant improvement (a 57.3% change) in the number of fans viewing F1 as healthier than previously, a majority of fans continue to disagree that this is the case. While positive progress has been made, there remains much work to be done (See Chart 5.3).

Chart 5.2 | Formula 1 Brand Attribute Changes (2015 v. 2017)

<table>
<thead>
<tr>
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<th>Decreases</th>
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<tr>
<td>+24.7%</td>
<td>Exciting</td>
</tr>
<tr>
<td>+19.1%</td>
<td>Technological</td>
</tr>
<tr>
<td>+14.4%</td>
<td>Competitive</td>
</tr>
<tr>
<td>+12.6%</td>
<td>Prestigious</td>
</tr>
<tr>
<td>+11.8%</td>
<td>Innovative</td>
</tr>
<tr>
<td>+11.2%</td>
<td>World Class</td>
</tr>
<tr>
<td>+8.50%</td>
<td>Entertaining</td>
</tr>
<tr>
<td>-19.9%</td>
<td>Boring</td>
</tr>
<tr>
<td>-11.6%</td>
<td>Corrupt</td>
</tr>
<tr>
<td>-8.4%</td>
<td>Threatened</td>
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Chart 5.3 | Formula 1 Fans Levels of Net Agreement (2010-2017)
Formula 1 – Key features for fans
Alongside the marked and welcome changes in F1 brand health and satisfaction, fans were asked to provide insight on the key ingredients for F1 success. The findings in 2017 are remarkably consistent with those previously recorded in 2010 and 2015 (See Chart 5.4).

The key to maximising F1’s appeal among fans is increasingly concise…

Deliver exciting racing among the best drivers, in the fastest machinery, featuring pioneering technology which delivers close competition and lots of overtaking.

The 2017 Study identifies a ‘wave of optimism’ among F1 fans worldwide – an upsurge in satisfaction and attitudes driven by a change of ownership and revised sporting regulations since 2015.

Chart 5.4 | Key Features of Formula 1 (2010-2017)
The F1 Calendar

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

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

Headlines

- Less than a quarter of F1’s most avid fans attended a race in 2016
- Fans in Asia-Pacific were 50% more likely to attend a race than those in Europe
- Fans continue to strongly favour a 19-21 F1 race season
- Four Grands Prix are critical to fans: Monaco, Monza, Silverstone and Spa
- Fans indicate strong support for a GP return to Germany and France
- Abu Dhabi and Singapore have established strong support, especially among younger fans
- Good vantage points, a strong support programme and Pitlane / Paddock access are key for driving fan attendance
- Fans prepared to pay 16% more for tickets in 2017, but GP prices continue to outstrip fans’ willingness to pay

Within the 16-24 age group, the non-attendance level rises to over 80%. Of the 25% of fans who went to a GP in 2016, more than 80% attended only one event.

It should be noted that geography was not a significant factor in the low attendance percentage, with 80% of responses coming from fans resident in current F1 GP host venue territories (See Chart 6.1).

Notable regional differences in Grand Prix attendance were recorded – in Asia-Pacific, 30% of respondents attended a race in 2016, whereas in Europe this figure fell to less than 20%.
The F1 Calendar

The good news for F1 is that fans have been very consistent in their preferred number of races per season, the better news being that their opinion aligns very closely with the current F1 calendar.

Since 2006, fans have provided a clear and consistent preference for a 19-21 race calendar; the feedback from fans in 2017 only serves to reinforce the findings of previous studies (See Chart 6.2).
The Perfect 20

With a clear, stated preference for a 19-21 race F1 season, our studies since 2010 have focused attention on capturing fan opinion on the preferred shape of the calendar.

In contrast to the 2015 Survey, where we didn’t impose an upper limit on the number of Grands Prix fans could identify as ‘key’, in 2017 we returned to the framework employed in 2010 and obliged fans to specify a maximum of five venues viewed as critical to the annual F1 calendar.

Based on feedback from 2010, 2015 and 2017 we can provide a clear picture of the ‘perfect’ F1 fan season. Chart 6.3 details the cumulative appeal of all F1 venues over the past seven years.

The feedback allows us to segment the F1 calendar into four clear categories:

- **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

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

Beyond these 14 ‘core’ races, the picture is less clear-cut. Established events in Hungary, Malaysia and Austria, together with Mexico and Turkey, attract ratings between 4%-7%, whereas the Grands Prix in China, Bahrain, Russia and Azerbaijan have yet to capture significant appeal among F1’s global audience (< 3%)

Analysing fan response by age profile mirrors the global picture, with two notable exceptions – Abu Dhabi and Singapore. Both score significantly higher approval ratings among the 16-24 age group. In the case of Abu Dhabi, younger fans rank the season-closing race as the eighth-most important GP of the year – ahead of well-established events including Australia, Canada, USA and Spain.

While fans predominantly consume F1 through third party media channels, the sport continues to attract significant event attendees, driving competition among nations, regions and cities to join one of sport’s most exclusive clubs.

Audited attendance figures from all F1 promoters are not publicly available. However, general consensus indicates that between 3.2m-3.5m individuals attended a Formula 1 event in 2016; generating gate receipts in the range of $625m-$650m.

With 24,500 respondents to the 2017 Study attending at least one GP in 2016, their feedback provides F1 promoters with an invaluable insight into key Grand Prix features as well as indicative pricing information to help drive increased attendance in the future.

Chart 6.4 illustrates the relative importance of race features in attracting fans – the most important of which being good vantage points for race viewing, pitlane and paddock access, a strong support race programme and a good range of accommodation options.

Interestingly, fan feedback shows the relatively low importance for additional event entertainment like live music concerts, which have become a regular feature on the F1 calendar in recent years.

Among younger fans (16-24) the importance of driver autograph sessions, fan and gaming zones rises significantly.

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

In 2015 and 2017, we explored the effect of Grand Prix ticket pricing as a contributing factor in the global decline of race attendance witnessed over the course of previous studies.

Using the benchmark of a three-day General Admission Adult Ticket, fans were asked to state their opinion of the prices, in either £, $ or €, that represented...

- Good Value
- Reasonable Value
- Expensive
- Too Expensive

Responses were collated and converted into a standardised US$ measure, based on prevailing currency rates and compared with the lowest-priced 3-day General Admission tickets available publicly via tickets.formula1.com.

In the intervening years between the 2015 and 2017 Studies, we discovered a compound 8% p.a. increase in the average price fans were prepared to pay for Grand Prix tickets (See Chart 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

However, when we compared fan willingness to pay with the best available rates for F1 tickets, we discovered that over the same period, the number of GP promoters offering tickets within the ‘Good Value’ or ‘Reasonable Value’ categories fell, and in 2017 only the Malaysian GP is offering tickets at a level perceived by fans to be ‘Good Value’.

So, despite a significant uplift in fans’ propensity to pay, Grand Prix ticket price increases have outstripped their disposition to expend (See Chart 6.6).
The F1 Media Landscape

Written by: Anthony Rowlinson
Editorial Director, Motorsport Network

Television and specialist motorsport websites are the leading platforms for fans to access F1 news and information both during and outside of Grand Prix weekends.

Headlines

- Television and dedicated motorsport websites dominate fans’ F1 media consumption behaviour
- General sports websites, newspapers and radio have experienced significant falls in usage since 2015
- Social media usage climbs, but remains significantly below TV and web
- Over 90% of fans want to watch every race live on TV, or via live streamed coverage online
- The growth of Pay TV broadcast access is depressing overall F1 viewing. Effect on European audience is particularly marked
- Over 40% of F1’s most-avid fans now missing entire races due to Pay TV broadcasting
- Resolving the Pay TV volume / value equation is key

Media Consumption By Platform

Over race weekends, TV and specialist digital media are accessed by over two-thirds of fans on a frequent basis; more than double the usage of any other platform (See Chart 7.1).

Outside of race weekends, the importance and frequency of use of television falls back, but the percentage of fans accessing motorsport websites remains constant – resulting in twice as many fans accessing dedicated motorsport websites as any other media.
While television remains a key media for fans to access F1 – particularly over GP weekends – historic studies have charted a slow decline since 2005. This decline, has accelerated since the 2010 Study.

In terms of regional variances, the Study showed that fans in the Americas were 14% more likely to frequently access TV for F1 coverage than those in Asia-Pacific. Conversely, fans in Asia-Pacific were more disposed to accessing Social Media and online streaming of F1 via digital media than those in Europe or the Americas.

Regular fan usage of social media, particularly among the younger age groups (16-34), has unsurprisingly increased since 2015, however, its rise has been gradual rather than spectacular. In 2017, just over 30% of fans frequently access social media for their F1 information needs. In terms of applications, use of Twitter now exceeds Facebook – with Instagram recording the largest individual service growth since 2015.

Traditional media platforms, particularly newspapers and radio, together with general sports websites have experienced a sharp decline in usage; use of general sports websites has fallen by nearly a half, while the proportion of fans using newspapers or radio has declined by 27% and 14% respectively.

In contrast, the readership of F1 magazines appears to have stabilised following a decade of decline between 2005-2015. Across all age profiles, just over 11% of fans are regularly reading F1 magazines; for the first time since studies began, F1 specialist magazines have proved more popular than newspapers among F1 fans.
TV – Still F1’s most powerful platform
The most important media platform for Formula 1 in terms of fan reach and fan preference is undoubtedly TV; not only is it currently the most accessed media, it is also the platform through which the majority of F1 fans wish to consume the sport in the future.

Unsurprisingly, given the avid nature of the fans responding to the Study, over 80% of fans expect to watch more than 13 Grands Prix on television each year – this increase from 2015 is further evidence of the sport’s improving perception and appeal among its fanbase (See Chart 7.2).

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

Fans are prepared to commit significant time engaging with the sport: over 90% of fans currently watch an entire race from lights to flag, with 60% of those also watching the pre-race build-up and post-race analysis (See Chart 7.3).

Chart 7.3 | Quantity of GP Broadcast Viewed (2010-2017)
Future Viewing Preferences
Mirroring our work in 2015, the 2017 Fan Survey captured fan feedback on how fans wished to consume F1 in the future.

However, in this year’s Study, we adopted the forced distribution method to extract a more definitive response from fans, as opposed to 2015 where we allowed fans to indicate multiple methods to consume F1 TV output. In 2017, fans had to provide a single preference for future viewing, rather than a range of possible viewing options.

The headline results in 2017 were broadly consistent with those collected in 2015 – fans displayed a clear preference for viewing F1 live on TV (See Chart 7.4).

However, deeper analysis of the data provided interesting variances across regions and age groups...

1. Over three-quarters of fans in Europe want to watch F1 live on TV in the future; whereas this figure falls to 63% in Asia-Pacific and 66% in the Americas (potentially affected by race start times due to time difference).
2. In the Americas, there was a marked increase in the percentage of fans wanting to view pre-recorded races in full; again reinforcing the impact of GP start times for American fans.
3. In Asia-Pacific the preference for online viewing rose to 15%, a level 4% higher than that recorded in the Americas and Europe.
4. Age profile analysis showed a marked shift from live TV to online race streaming among younger fans (16-34).

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

Chart 7.4 | Fans’ Future Viewing Preferences (2017)
The Impact of Pay TV – balancing the viewer volume and value equation

With less than a quarter of F1’s most avid fans attending a GP each year, Formula 1 is a heavily ‘media-reliant’ sport.

In 2017, the fan feedback shows a marked improvement in overall F1 satisfaction and brand appeal, along with a clear recognition that F1 has re-established itself as the pinnacle of motorsport and the sporting arena for the world’s best drivers.

Furthermore, F1 fans have displayed a clear preference for accessing F1 news, information and coverage via a combination of live television and dedicated motorsport digital platforms.

They are prepared to invest significant time in following their favourite sport through watching the full Grand Prix plus pre-race and post-race analysis live on TV.

And yet, despite all these clear and positive indications of F1’s health and appeal, the overall number of fans accessing the sport on TV has declined by nearly 25% since 2010.

This seemingly inconsistent picture has at its root one single contributing factor – the growth of Pay TV, and its increased prevalence in core F1 markets.

Since 2010, we have recorded a marked decline in F1 TV viewing, and in 2015 we set out to explore this phenomenon in more detail. The 2015 Study established that over 50% of fans were either missing entire races or only viewing highlights when live races were limited to Pay TV platforms. The impact on viewing habits as a result of the changes to broadcast output was most keenly felt in Europe.

In 2017, the downward pressure on live race viewing due to Pay TV continues. Globally, 40% of fans watched less F1 due to the impact of Pay TV, with the impact in Europe once again being the most acute.

Mirroring the results in 2015, the number of fans adversely affected by F1’s move to Pay TV is split equally between those who miss entire races and those restricted to watching highlights when available on free-to-air channels.

In 2017, 48% of F1 fans surveyed indicated no change in their overall F1 viewing habits, up from 38% in 2015, with 12% of fans now watching more F1 coverage thanks to the increased quantity of programming and the ability to view F1 output on demand through their Pay TV providers (See Chart 7.5).

The F1 Competitors

Written by: Edd Straw
Editor in Chief, Autosport

Lewis Hamilton and Fernando Alonso enjoy strong growth to be clearly established as Formula 1’s most popular stars. Ferrari’s global appeal continues to rise.

Headlines

• Lewis Hamilton (#1) and Fernando Alonso’s (#2) popularity increases sharply
• Lewis’ popularity particularly strong in Europe and Americas
• Raikkonen and Vettel acclaim broadly unchanged at #3 and #4
• Ferrari reinforces its position as the #1 most-supported team
• Ferrari ranked #1 across all regions and in 21 of the top 25 markets by response
• Mercedes F1’s on-track success and driver line-up produces big gains in popularity – rising from #4 in 2015 to #2 in 2017

F1 is non-tribal
Formula 1 engages fans on a sport-first basis. In sharp contrast to most team-based sports, F1 fans are not typically, or overtly tribal in their support. Over half of F1 fans profess not to follow one particular team or driver, and while there is a small preference among fans (particularly in the 16-24 age range) to favour drivers over teams, the overall effect is minimal.

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
Drivers
The fact that Formula 1’s most followed and most successful current driver Lewis Hamilton tops the global popularity ranking is perhaps unsurprising; but analysis of the data reveals a far more interesting story.

Lewis’s popularity has doubled since the 2015 Study, and in 2017 stands at over 20% – a level of support not seen since Michael Schumacher’s popularity and dominance over 12 years ago.

However, Lewis polarises opinion…

Geographically
In Europe he is the #1 for over a quarter of all fans; and yet his support in Asia-Pacific is less than half that figure. He is the favourite for nearly half UK F1 fans, and is the clear fan favourite in the US, Canada and South Africa.

Loyalty
Lewis was placed in the Top 3 by 34% of fans, a figure significantly below that enjoyed by Fernando Alonso, Daniel Ricciardo, Kimi Raikkonen and Sebastian Vettel. However, over 60% of those fans citing Lewis in their Top 3 went on to name him as their outright favourite. This is in marked contrast to other drivers, whose support declined by 60-70% between Top 3 and #1.

In addition to Lewis, the other driver enjoying a significant boost in popularity was Fernando Alonso, whose support rose from 12.7% to 18.3% – placing him a clear second behind Lewis. Both drivers appear to have been the biggest beneficiaries following the departures from F1 of the popular Jenson Button and Nico Rosberg after 2016.

Kimi Raikkonen’s popularity remains almost unchanged at 14.3% in third, his standing bolstered in part by support from F1’s most patriotic fans: over 6,000 fans from Finland participated in the Study with over 85% of them placing Kimi at #1.

Among the 16-24 age group, Sebastian Vettel proved twice as popular as Daniel Ricciardo; this support proved decisive lifting him to fourth overall, ahead of Ricciardo who fell to fifth (See Chart 8.1).

Also of note is the continuing rise of Max Verstappen, whose popularity doubled, making him F1’s sixth most popular driver, with 7.4% of the global vote bulked by over 80% support in The Netherlands. Interestingly, his support among older fans (35+) was significantly higher than among fans aged (16-34).
Ferrari’s global popularity increases across all regions, genders, interest levels and age groups

Teams
In marked contrast to the popularity swings and geographical variances of the drivers, support for teams proved far less volatile.

Ferrari strengthened its position as the world’s favourite F1 team, with nearly one-third of the global fanbase ranking it as their #1. Ferrari’s support is almost double that of its nearest competitor, the fast-rising Mercedes AMG F1 team.

Ferrari’s support and popularity is truly global; it is the #1 ranked team in each region analysed, as well as being ranked #1 in 21 of our top 25 markets analysed by audience response. Among younger fans its appeal is even stronger with 37.5% of fans aged 16-24 citing Ferrari as their favourite team.

Support for Mercedes has nearly doubled in the past two years, rising to 16.2% (19% among the 16-24 age group) and moving the team from fourth to second in global popularity behind Ferrari. A combination of both on-track success and driver line-up has been a strong contributing factor as exemplified by the fact that Mercedes enjoys #1 status in the UK, but not in its ‘home’ market, Germany.

As a result of on-track difficulties since the 2015 Study, McLaren’s popularity fell by 5% to 15.8%, placing it just behind Mercedes but ahead of Red Bull Racing in third. Red Bull’s popularity continues to rise year on year, as it has done since our first team Study in 2006. It is the favourite team for 14% of global fans placing it fourth overall, followed by Williams F1 in fifth and Renault in sixth.

Sahara Force India’s support has doubled since the last Study in 2015, and now stands at 1.8% in seventh, just ahead of newcomer Haas F1, who – backed by strong US support – enters for the first time in eighth with 1.6% support (See Chart 8.2).

Chart 8.2 | Formula 1 Team Ranking (2008-2017)
F1 Sporting Changes

Written by: Stuart Codling
Executive Editor, Motorsport Network

In the 2017 Study we explored fan opinion on potential future sporting changes to be reviewed by Formula 1 administrators.

Headlines

• Previous studies in 2010 and 2015 have led directly to positive sporting changes
• Fans dismiss artificial race manipulation or gimmicks
• Fans happy with the current GP weekend format
• Fans repeat calls to
  o Reintroduce tyre competition
  o Return to V8 engines
  o Introduce Budget Caps
  o Reintroduce in-race refuelling
  o Allow teams buy and run customer cars
  o Award points for Fastest Lap

In previous studies, F1 stakeholders have used fan feedback as a foundation or validation for introducing sporting changes.

In 2010, our work with the Formula One Teams Association [FOTA] provided the catalyst for...

• Revision of the Formula 1 points system and increased differential between first and second place points
• Global testing and introduction of High Definition TV output
• The development and introduction of Drag Reduction System to increase in-race overtaking
In 2015, the work with the GPDA provided the sport with a timely crisis report detailing fan dissatisfaction, which provided a clear blueprint and mandate for change. Fans called for improved racing through increased cornering speeds, faster cars, the best drivers, pioneering technology, a reduction on driver aids and racing held on the world’s best circuits.

The results of the 2017 Study provide a clear vote of approval for these changes introduced, and further vindication of the importance and timing of the 2015 Study.

Formula 1 in 2017 is in a far healthier position than the one documented in 2015, and while the sport faces a challenge to balance the volume and value equation of Pay TV, through this Study fans have provided some clear insight into their future preferred viewing habits.

In this section, we re-visited a number of areas explored in 2015 to seek a clear, coherent picture of fan opinion on a number of potential sporting and regulatory changes.

The table (Chart 9.1) below details the level of net fan agreement against a number of Formula 1 statements. The results, detailed below, are calculated by measuring all positive (agree and strongly agree) responses against all negative (disagree and strongly disagree) responses. For the basis of this analysis, fans response for ‘neither agree nor disagree’ and ‘no opinion’ are omitted.
The results of the 2017 Study bear very close resemblance to those recorded in 2015. Once again fans have decisively dismissed any ‘artificial’ or contrived changes to deliver closer or more unpredictable races. Specifically, there is little or no appeal among fans for gimmicks such as...

- Sprinkler systems
- Success ballast
- Reverse grids
- Rapidly degrading tyres

Similarly, and again echoing the 2015 findings, there is little or no appetite for changes to the format and structure of the GP weekend...

- No to Saturday races
- No to third (reserve) driver races
- No to two shorter races at Grand Prix

The areas identified by fans for review and potential change remain consistent and in some cases strengthened in 2017, namely...

- Annual team budget caps to be agreed and policed
- Allowing independent teams the ability to purchase and compete with ‘customer cars’
- The award of championship points for fastest lap.
- A return to in-race refuelling
- A return to V8 engines
- A return to tyre competition between manufacturers

Whether these suggestions can fit with the FIA and FOM’s long-term strategic views and business models – and what their sporting consequences would be if adopted – is for the sport’s governing body and commercial rights holder to decide. Changes should never be adopted for their own sake, but must provide solid evidence that their adoption would enhance the sport, and not put any aspect of it at risk.

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.
F1 Merchandising and Gaming

Written by: Ben Anderson
Grand Prix Editor, Autosport

For the first time in 2017 we analysed fans spend on Formula One merchandising and explored the growth of the motorsport gaming sector.

Headlines

• Respondents spent over $8.8m on F1 merchandise in 2016
• Average spend of $155 was generated, mostly through online and event sales
• European fans are significantly less likely to spend than those in Americas and Asia-Pacific
• Over 50% of F1 fans regularly play motorsport computer games
• Gaming participation rises to over 80% among 16-24 year olds
• Most fans are gaming in a single-player environment via games consoles
• F1 licensed games are both the most played and preferred

Merchandising

Analysis of feedback from the 2017 Study shows that 38.5% of fans purchased Formula 1 related merchandise in the past year. We recorded little variance across the regions and age profiles.

The cumulative spend of 57,000 respondents who purchased merchandise totaled $8.8m; equating to an average spend of $154.83.

Reflecting the balance of team and driver following among fans detailed previously in The F1 Competitors analysis, merchandise spend was evenly spread across both driver and team related merchandise. In terms of product categories: team and driver caps; polo shirts and replica cars accounted for over 65% of total spend (See Chart 10.1).
Survey respondents collectively spent over $8.8m on F1 merchandise, an average of $155 per head

Reflecting wider retail trends online purchases accounted for nearly half of all transactions making it the largest single sales channel.

While less than 25% of Survey respondents attended an F1 race in 2016, over 55% of those who did subsequently purchased merchandise at the event, making event sales the second most valuable sales channel for F1 merchandise. Traditional in store retail sales of F1 merchandise accounted for less than 20% of all transactions (See Chart 10.2).
Gaming

The 2017 Study highlights that just over half of all respondents regularly play motorsport themed computer games and, while regional variance is minimal, with fans in Europe and Asia-Pacific marginally more likely to actively involved in gaming than those in the Americas, analysis by age profile produces a more meaningful indication of future trends.

Regular participation in motorsport themed gaming among the 16-24 age range exceeds 80% and declines in a broadly linear scale across the age profiles, falling to 25% in the 45+ age group (See Chart 10.3).

Further analysis identifies that the vast majority of fans are currently accessing motorsport games through a console (X-Box, Playstation, Nintendo) and participate in a single player environment (See Charts 10.4 and 10.5).
Among the 16-24 age range, over 80% of fans are regularly playing motorsport themed games

In terms of the individual gaming series played by fans, the official F1-licenced series created by Codemasters is clearly established as both the most played and most favoured game. Within the critical 16-24 age group the game is regularly played by over 75% of all respondents and is more than three times more popular than any other game series (See Chart 10.6).
2017 Survey Key Statistics

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

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.

The 2017 Survey was constructed, tested and translated into 15 languages. It was hosted via a common, multi-lingual website at www.f1survey.motorsport.com.

A total of 215,892 fans accessed the survey online during the 19-day fieldwork period between Sunday 26th March until Wednesday 13th April 2017.

A total of 148,170 completed responses were collected and submitted for analysis, making this Study the largest ever conducted in Formula 1.

Survey questionnaire construction and testing, data analysis and results interpretation were conducted by industry experts, Nielsen Sports, with project planning, management, co-ordination and reporting provided by MPA Commercial.

Thanks to more intuitive design the average completion time was reduced by 15 minutes to a little over 10 minutes.

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