

Formula1® in 2021

**Global fan insight into the world's
largest annual sporting series
(2005–2021)**

Management Report

October 2021

motorsport
NETWORK

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Foreword

Stefano Domenicali
CEO, Formula One Group

Dear friends,

We are hugely grateful for all the fans that have given their time to share their views in this huge survey. Their views are hugely valuable to us and we are very pleased with what we have heard.

We are privileged as a sport to be truly international, racing in continents and countries around the world with a global fan base of over half a billion. We reach every corner of the globe through our events, tv broadcast and social media and media content.

If you show people a picture of an F1 car anywhere in the world they will know what it is, and they will think of speed, legends, and racing.

This is a blessing – to have such a platform – but it is also a responsibility. We must protect what we have, grow it, reach more fans, and ensure those blessings remain and get stronger.

While the current global environment is still challenging, we are moving forward. We are focussed on the fans. We must give them what they want in order to keep them engaged. We must retain our core fans while reaching new ones in engaging ways. A balance that requires skill and consideration.

We are focussed on the content we deliver and the way we deliver it. Our strategy is to keep pushing hard in this area. Continuing to provide rich and engaging broadcast coverage but growing the content in other less traditional forms through social media, partnerships such as Netflix – which has been a huge success – and through consumer and more mainstream media.

This is all hugely positive for the sport. However, the action on track must be exciting and engaging to make this possible. The good news is that action is already underway and in 2022 we will see a new era of cars that will improve the battle on the track.

We have a clear plan to maintain the progress we have and attract new fans and we remain focussed on the key priorities and opportunities we see in front which are:

Putting the drivers at the centre of F1 as they are the souls and the ambassadors of the sport. The level of talent we have today on the grid is among the highest in F1 history and we should celebrate that.

Delivering an incredible product that strengthens competition and action on the track, including a record-breaking 23 races next year and new race locations added to the calendar.

Enhancing the long-term prospects of the sport, ensuring an attractive business model for all participants, and attracting new participants; and remaining committed through our actions to our WeRaceAsOne platform focused on sustainability, diversity & inclusion, and community.

We are hugely excited about our future, and we know our fans are too. We look forward to writing the next chapters of this amazing sport with all of you

Best wishes

Stefano



Executive Summary

Written by: James Allen

President, Motorsport Network

Clearly this is a great time to be a Formula 1 fan.

The results you will read across the pages of this 2021 Global F1 Fan Survey show that F1 is in rude health, certainly the best I have known it in my 30 year career in the sport. The views expressed here by 167,000 voices in 187 countries about of the appeal of F1 and the health of the F1 brand today are in striking contrast to the 2015 survey and show a strong upward trend from the 2017 edition.

It was no secret that F1 had been struggling for years to attract younger fans and females especially and this survey speaks volumes about how the new F1 management team's digital first approach and the funnel effect of projects like Netflix "Drive to Survive" are engaging a new generation of passionate F1 fans. And the racing on track is delivering too. Thanks to the internet and social media anyone anywhere today can become a fan. At Motorsport Network this is something we recognized some time ago and as a consequence we created our global online motorsport community; and they have spoken.

So what are the key call-outs that I would direct you towards in this survey?

First the younger and more diverse audience sample than before, with twice as many female respondents as the 2017 survey and fans spread more evenly across the world. Europe's audience dominance is diminishing and the voices from Asia are far louder than before.

Wherever fans are located and whatever age or gender, the powerful majority view (90%) is that F1 is the "pinnacle of motorsport".

The most positive take-out is the trend line on brand attributes for the sport. "Exciting" is the most popular descriptor this time, while "competitive" and "entertaining" enter the top five for the first time in our surveys. 58% of fans say the sport has the right balance of sport and entertainment (up from 39% in 2017). This is especially the view of newcomers to the sport.

F1 will also be pleased to note that 55% of fans believe F1 should be a world leader in the development of 100% sustainable fuels. This is a major strategic future direction for F1 and they will be gratified to see that 67% of respondents to this survey are already aware of F1's plan to introduce 100% sustainable fuels by 2025. But there is more work to be done there in the coming years to spread more widely an important message.

No doubt most social media posts in the days following the publication of this report will focus on the fans' favourite drivers and teams.

McLaren has experienced a renaissance and is now the world's No.1 most popular team, followed by Red Bull, Ferrari and Mercedes.

Max Verstappen is the fans' overall No.1 driver and dominates amongst fans ages 25-34. Lando Norris is No. 2 and the highest-ranked driver amongst the female demographic and leads with under 25s. Lewis Hamilton is No. 3 and the highest-ranked in the United Kingdom and top amongst fans 35+ years old. Daniel Ricciardo is No. 4 and the highest-ranked in Australia, and No. 2 amongst female fans.

The growing correlation between the sport and gaming/esports is also a key narrative here.

More than half of all fans (51%) play motorsports-specific video games, with 64% of those aged 16-34 being active motorsport gamers.

We look forward with great interest to seeing where all these indicators will be pointing when we return to the next Global F1 Fan Survey in a few years' time.



Methodology

Written by: Nigel Geach

SVP Global Motorsport, Nielsen Sports

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

Engaging with fans is the key part of any sport to keep up with the ever changing sports landscape and media consumption. Understanding their perspectives and opinions on current and future activities is crucial in helping to shape the future and continued success of the sport

The 2021 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 167,000 fans, from 187 countries shared their feedback over a five-week period over 4 race weekends during September/October 2021

Continuing the theme of 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.

The regular capture of feedback from such a large and diverse fan base, for the third time in less than six 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 2017, this latest edition 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 of the sport, diversity of respondents, and younger demographic seen since 2017, with the fans' voice being heard, actions taken and positive change recognized is considerable. Being able to leverage the views of F1 fans again in 2021 after a challenging world situation can only serve to strengthen the sport even further moving forward in the coming years.





F1 Audience

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

Our biggest survey ever, the most diverse F1 audience yet

- Largest sample ever analysed – 167,302 responses
 - Youngest ever sample recorded – 34% of respondents < 24 / 63% < 34 / Average age 32y 0m
 - Highest female participation ever - 18.3% of total sample, up from 10% in 2017
 - F1 attracts, passionate new fans with 34% following sport for <5 years, up from 12% in 2017
 - Greater geographic spread – 187 countries represented with a significant uplift in Asia-Pacific, Middle East and Africa response
-

The audience which completed the 2021 F1 Global Fan Survey is the youngest, most diverse, and comprehensive yet.

The Survey was created and translated into 15 languages and hosted via Motorsport Network's bespoke, multi-lingual website at www.f1survey.motorsport.com. Over 175,000 fans visited the site during the 30-day fieldwork period, which was conducted from September 8th to October 7th 2021. The total sample made available to Nielsen Sports, our expert research partner, was 167,302. This represents a 12.9% increase on our previous largest survey, which was conducted in 2017.

Average completion time was maintained at 10m37s, in line with our previous surveys, and analysis captured analysis by age, gender, geographic region, level of interest as well as breakdowns for the Top 15 markets by response.

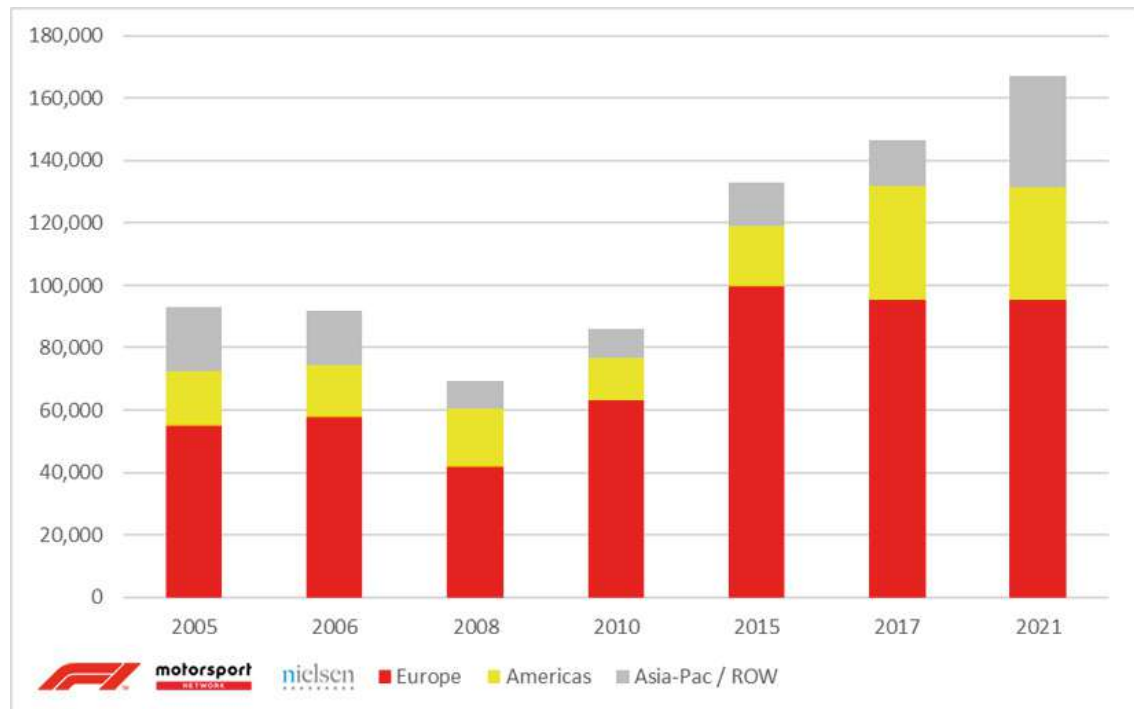
In 2021, we are delighted to report a welcome shift in audience demographics:

1. Largest-ever sample size for analysis

While research samples of more than 1,000 respondents are considered statistically robust, an increase in the overall sample to 167,302 exemplifies the desire and dedication of Formula 1 fans to commit significant time and effort to voice their opinion on the sport they love.

2. Greater geographic spread

Responses were received from fans in 187 countries worldwide (Note: The United Nations officially recognises 203 countries) and while the 2021 Study – like all before it – showed a response bias towards European fans, this fell to its lowest level ever. European fan responses accounted for 57% of the overall sample; compared to over 63% in 2017 and +70% in all previous studies. In parallel, we saw a doubling of response from Asia-Pacific, Africa and the Middle East, which accounted for 21% of the total response – up from 10% in 2017. Response from the Americas remained constant at 36k, which accounted for 21% of the increased sample.

Chart 4.1 | Global Fan Survey Sample (2005-2021)

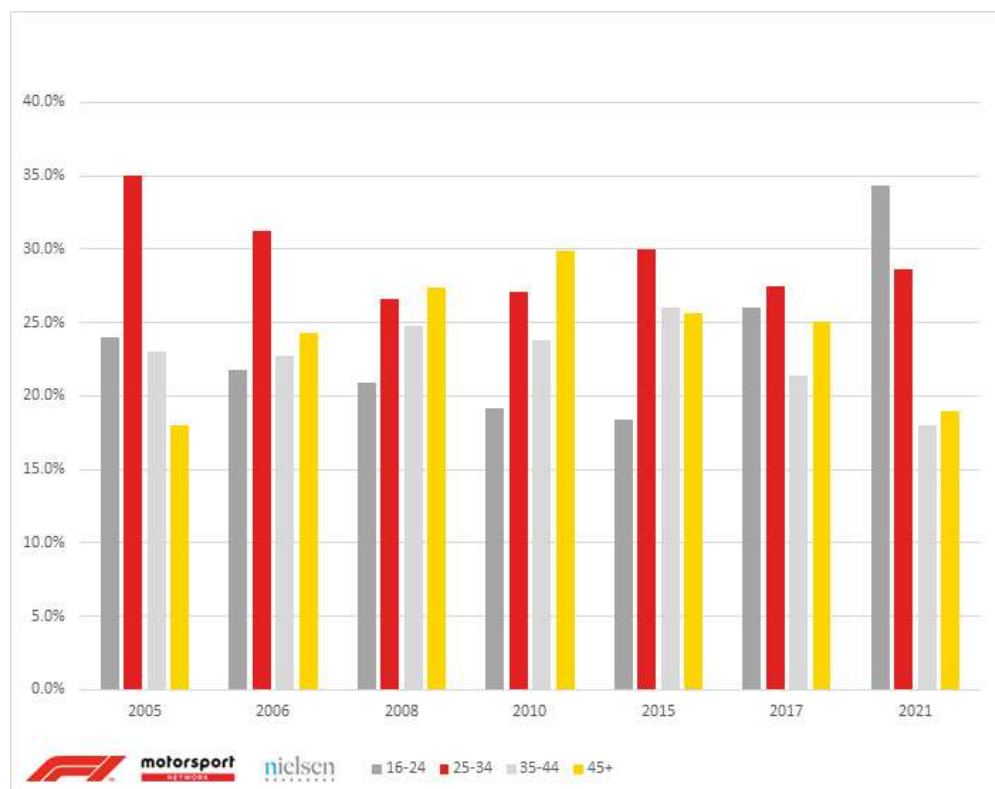
The 2021 Global Fan Survey received and analysed detailed feedback from Formula 1 fans in 187 countries around the world

3. Greater female participation

This was the most diverse study to date. In 2021, female participation increased dramatically from the 2017 survey to over 30,000 – which is 18.3% of the total sample. This represents an 83% and 177% uplift respectively on the 2017 & 2015 Studies. Regionally, the female response rates were at their highest in the Middle East and Africa, with one in four respondents being female.

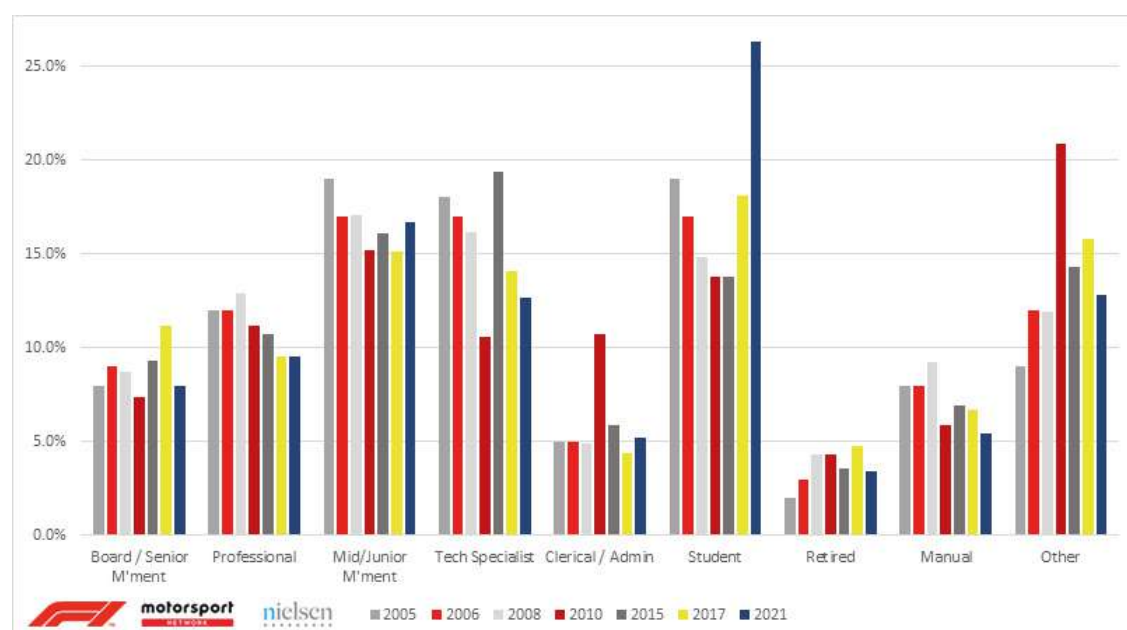
4. Younger demographic

The 2021 Study attracted the youngest age profile of respondents ever. Over a third of respondents were aged 16-24 – up from 26% in 2017. The average age of the 2021 sample was 32 years, 0 months – with 62.9% in the age range 16-34.

Chart 4.2 | Age Profile of Respondents (2005-2021)

5. A fresh audience

Previous studies since 2005 have always featured a high percentage of long-standing fans. Typically, 85%+ of the sample had comprised fans who have followed F1 for at least six years and this led directly to F1's corresponding drive to attract a fresh audience. A very welcome output from the 2021 Study is a sharp increase in the percentage of participants following F1 for five years or fewer: this has tripled from 11.7% in 2017 to 34% in 2021.

Chart 4.3 | Occupational Analysis of Respondents (2005-2021)



Any research is only as credible as its sample, and we are delighted to announce that the 2021 F1 Global Fan Study attracted the biggest, freshest, youngest and most balanced global response since analysis began in 2005.

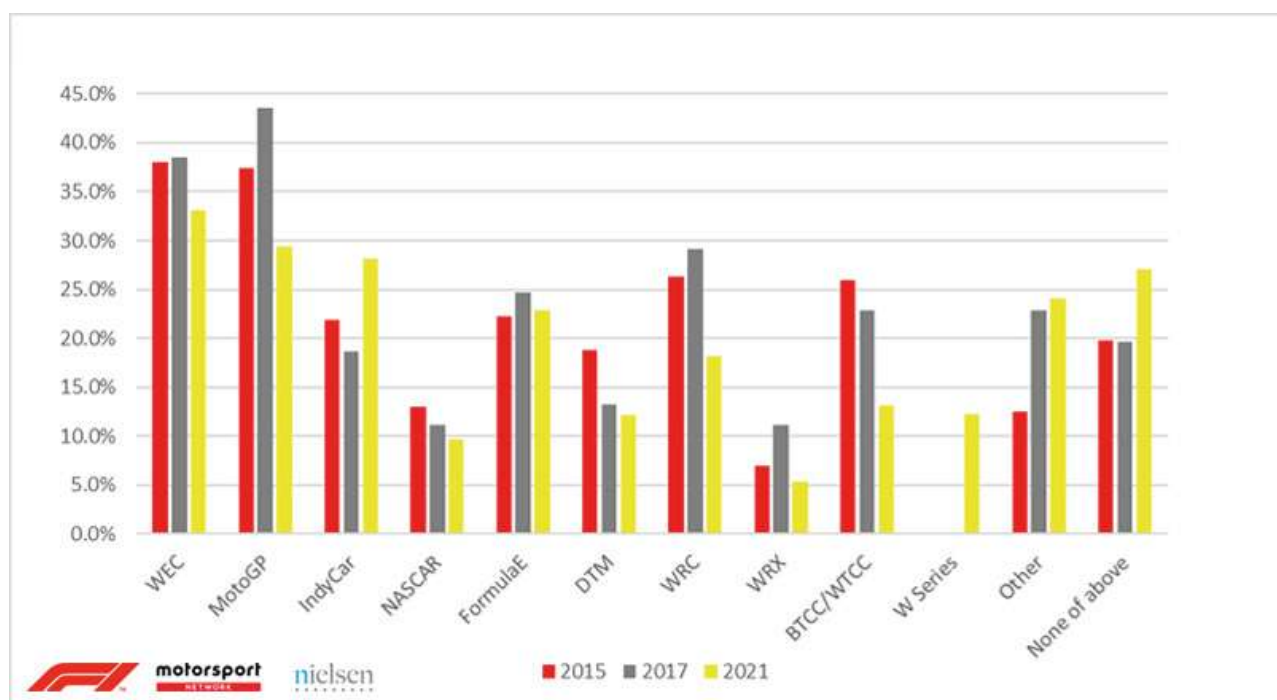
In a theme that will be returned to later in this report, there was a welcome increase in the percentage of fans who viewed Formula 1 as their favourite sport – up by 3% on 2017 to 55.5%. There was also a corresponding fall in the percentage of fans who had previously viewed F1 as their #1 sport, but now followed other sports more actively: down from 7.1% to 3.4%.

In terms of other motorsports followed, Formula 1 fans continue to follow the FIA World Endurance Championship (including its flagship Le Mans 24 Hours) and MotoGP and in significant numbers, albeit the following for both has dropped back slightly since 2017 to 33.1% and 29.4% respectively. The motorsport series enjoying the fast-growing support among F1 fans is IndyCar – up by 51% on 2017 to 28% – no doubt helped by former F1 drivers Romain Grosjean and Marcus Ericsson joining its ranks.

The other significant change is the relative newcomer W Series, the all-female single-seater championship. In its second season, when it joined the support bill of selected F1 rounds, it is being followed by 12% of F1 fans, and this clearly coincides with the sharp rise in female fans overall.

In 2021, over half of respondents consider Formula 1 as the sport they follow most avidly

Chart 4.4 | Other Motorsport Series Followed (2015-2021)





F1 Brand Health

Written by: James Dickens

Vice President of Editorial, Motorsport Network

Fan positivity reflected in strong brand attributes

- Building on 2017 successes – F1 Brand perception and fan satisfaction continue to improve.
 - F1's Top 5 attributes: Exciting, Technological, Expensive, Competitive and Entertaining
 - A 50%+ improvement in brand health vs 2017 with growing sentiment of F1 delivering the right balance of sport & entertainment
 - F1 exceeding expectations on all key sporting attributes – exciting racing, best drivers, fastest cars, most advanced technology with the exception of a continuing desire for increased overtaking
 - The need to attract new fans continues but at a reduced level
-

One of the most important elements to study and to track from these global fan surveys is the response from fans on how they feel about their sport. Do they consider the sport to be in better health than five years ago? What adjectives would they use to describe the sport as it is today? And as F1 tries our new features and rules, do fans believe it has the right balance between sport and entertainment?

In the 2015 Survey, conducted in association with the Grand Prix Drivers' Association, a standout feature was a sharp decline in fan satisfaction over a number of crucial brand elements, being highly critical of both the sporting spectacle and F1's governance of the time. With the evidence there for all to see, it proved a major wake-up call for the sport.

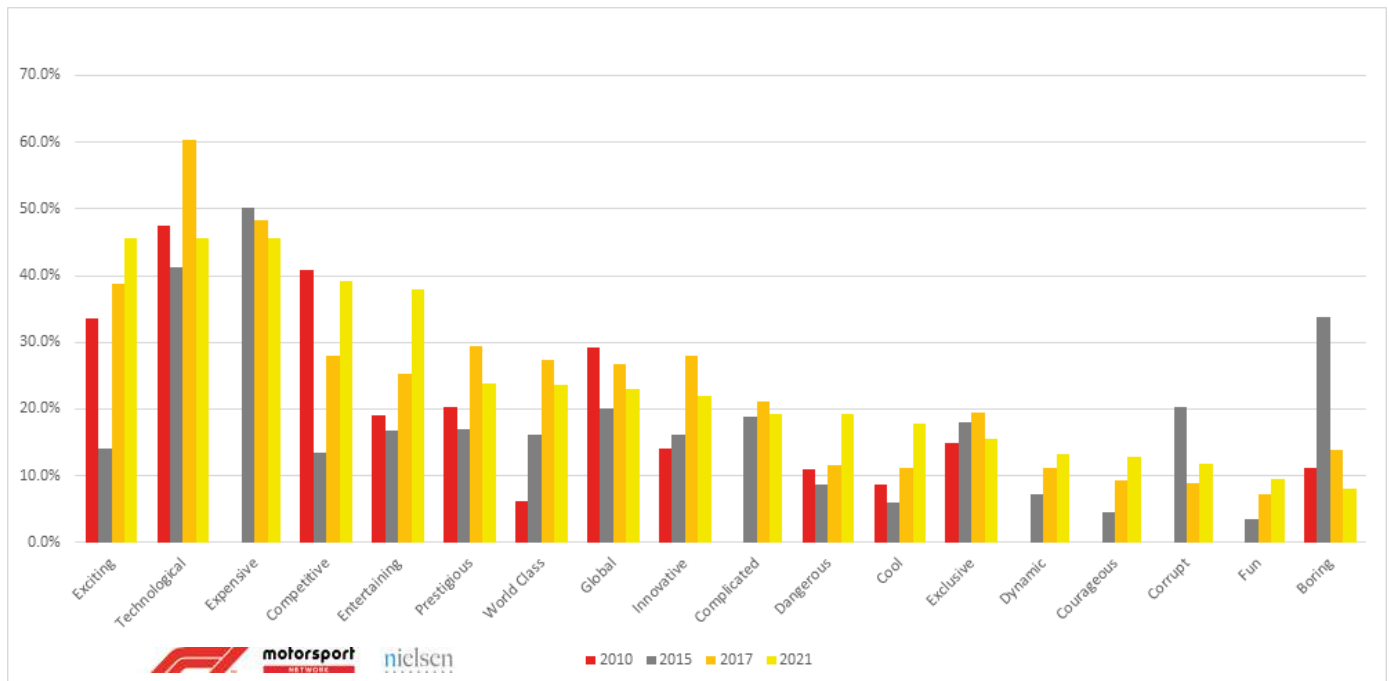
In the 2017 Survey, which immediately followed Liberty Media's takeover of F1, we recorded an improvement in the fans' positivity. Following on from that, one of the key objectives of the 2021 Study was to capture reaction to Liberty's stewardship and to test the response to the years since its acquisition.

We are pleased to report that the reaction from the global F1 fanbase is overwhelmingly positive.

F1 Brand Attributes

The on-going improvement in fan satisfaction is clearly exemplified by the ranking of fans' key F1 descriptors. In 2015, 2017 and 2021 we asked fans to indicate the five most-accurate attributes of Formula 1 from an identical list:

Chart 5.1 | Formula 1 Brand Attributes (2010-2021)

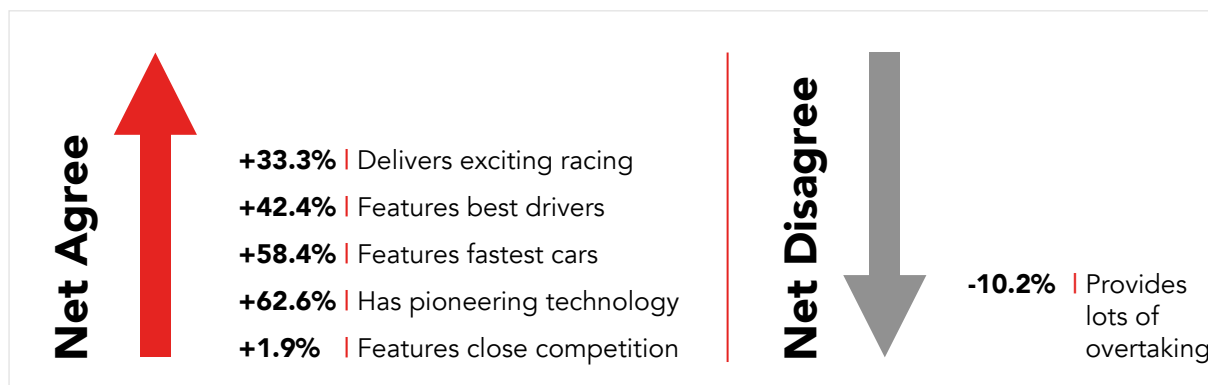


The top five brand attributes in 2021 have been identified by fans as Exciting, Technological, Expensive, Competitive and Entertaining. It is the first time that "entertaining" has entered the top five attributes.

Supporting this evidence is the fans' belief that F1 exceeds expectation for five of their top six most important measures. We tested F1's core attributes by weighing fan reaction for and against multiple factors and offsetting the resulting positive and negative responses.

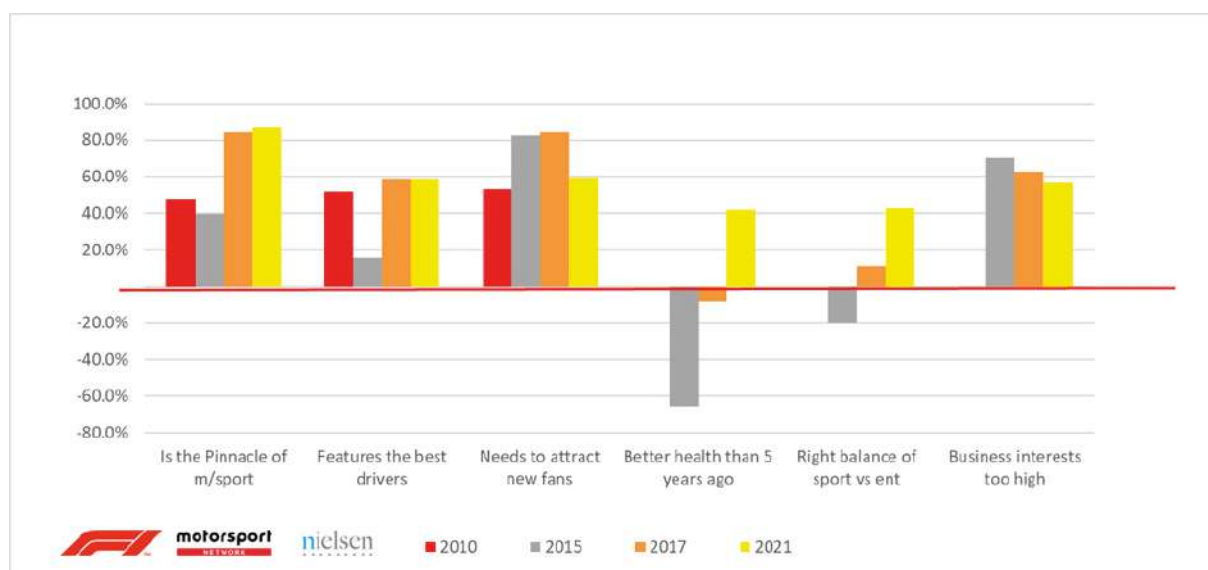
The results show that fans agreed F1 was exceeding expectation against many key measures:

Chart 5.2 | Formula 1 Brand Attribute Changes (2015 v. 2021)



The only under-performing key attribute was that F1 'Provides lots of overtaking' – this recorded a net disagreement of -10.2%. This is clearly an area that it aims to improve with the 2022 rules set.

Chart 5.3 | Formula 1 Fans Levels of Net Agreement (2010-2021)



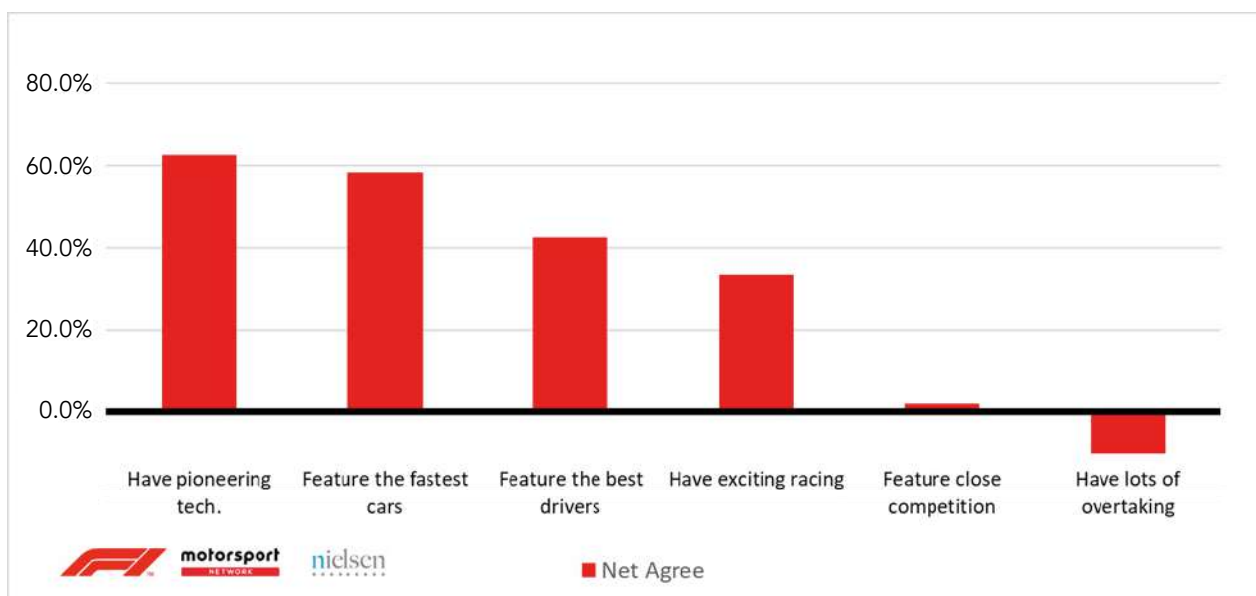


A particularly noteworthy finding in 2021 is the marked increase in the number of fans that view F1 as being healthier than before: 55% of fans agree with this sentiment, a 50% increase on 2017. Additionally, there is strong agreement that F1 strikes the right balance between sport and entertainment.

While overall fan opinion of F1 has improved markedly, fans do continue to voice concerns regarding the sport's need to attract new fans. However, that number has declined significantly since 2017, a fact supported with the significant increase in 'new' fans completing this Study.

The top five brand attributes are "exciting, technological, expensive, competitive and entertaining"

Chart 5.4 | Key Features of Formula 1 (2021)



The 2021 Study records a continuing 'wave of optimism' among fans worldwide.

The upsurge in satisfaction, engagement and attitudes driven by F1's change of ownership, revised sporting regulations and commitment to enhanced digital and social media output.



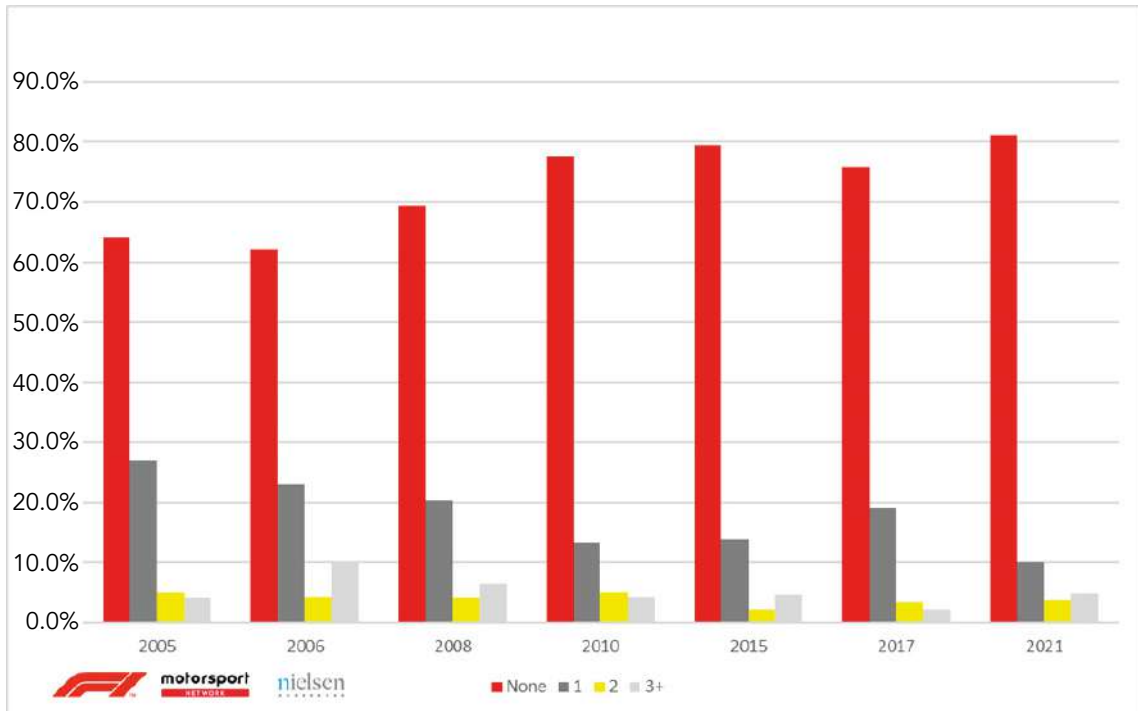
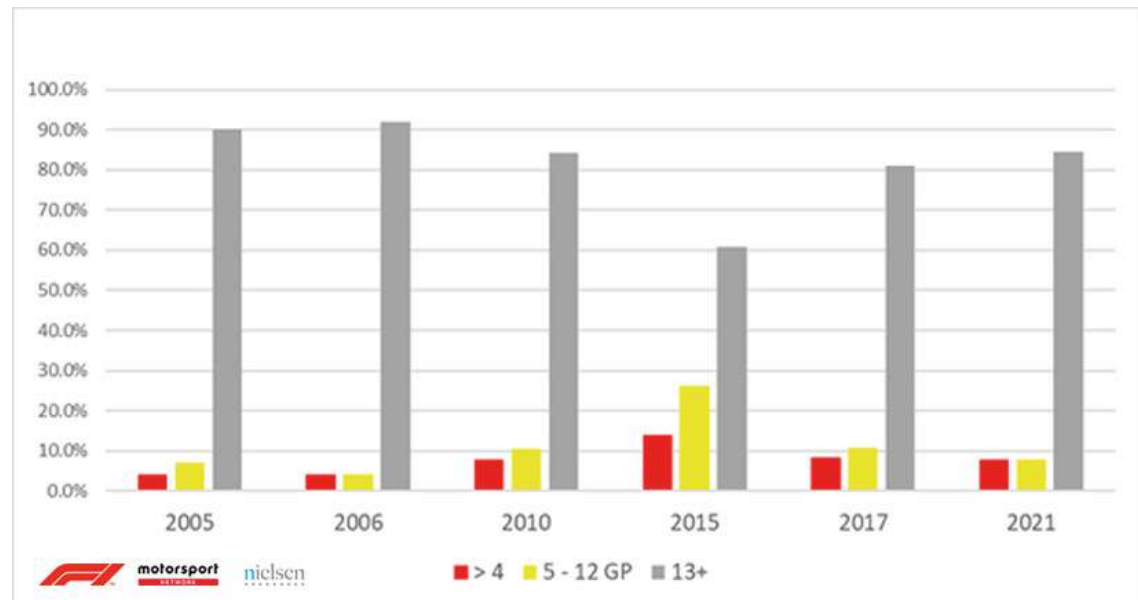
F1 Calendar

*Written by: Jonathan Noble
F1 Editor, Motorsport Network*

There's nothing like being there in person

- Three quarters of fans live in a country with a GP; but fewer than 20% have attended in the past 5 years. Fewer than 13% of respondents have travelled to a non-home GP since 2016.
 - Fans in the Americas are least likely to travel to their 'home' GP, fans aged 45+ are twice as likely to travel to an 'international' GP
 - Four GPs remain critical to all fans – Monza, Spa, Silverstone & Monaco
 - Race cancellations in 2020/'21 have dented the voting for Canada, Austin, Melbourne and Singapore
 - Significant increase in popularity for Austria, Baku, Zandvoort and Bahrain
 - For Race Promoters, the key GP features remain unchanged – ease of travel, ease of parking, good vantage spots, a strong support race package, together with Pit Lane Tours
 - Fans willingness to pay 20% more on race tickets than 2017, mean 3-day ticket price of \$195 indicated
-

Formula 1 continues to be an increasingly media-driven sport, with less than 20% of Formula 1's most-avid fans attending a Grand Prix in the past five years. While 75% of Survey respondents reside in a country with a 'home' Grand Prix; only 2.5% of fans have attended their local race each year since 2017.

Chart 6.1 | GP Race Attendance Per Annum (2005-2021)**Chart 6.2 | Preferred Number of GPs Per Season (2005-2021)**

The Perfect Calendar

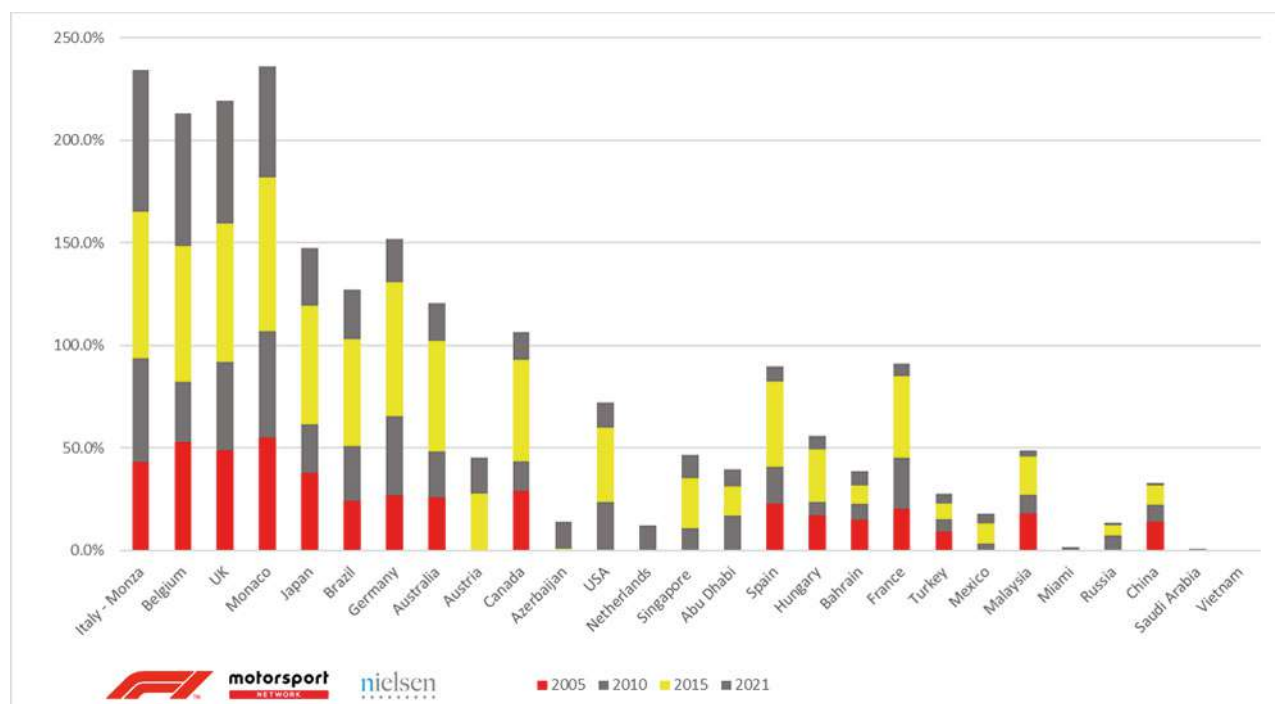
Since 2010 our studies have focused attention on capturing fan feedback on the preferred shape of the F1 calendar.

In 2021, we once again asked fans to indicate a maximum of 5 events identical to the annual F1 calendar. Based on our feedback from 2010, '15, '17 and '21, we have an increasingly clear and consistent vision of the 'perfect' F1 season. The table below shows the cumulative appeal of F1 venues over the past 11 years.

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

- **The Untouchables (4):**
Monaco, Monza, Silverstone, Spa
- **The Popular Perennials (5):**
Australia, Brazil, Canada, Japan, USA
- **The New Favourites (3):**
Azerbaijan, Abu Dhabi, Singapore
- **The Welcome Returnees (4):**
Germany, France, Austria, Netherlands

Chart 6.3 | Fans' Ranking of GP Importance (2005-2021)



Beyond these 16 'core' events the picture is less clear-cut and has certainly been impacted by the cancellation of races in 2020 and '21 due to COVID-19.

Perennial favourites such as Melbourne, Austin, Montreal, Brazil and Singapore have all been negatively impacted, as have Spain, France and Germany. This contrasts to events at returning venues or 'double-header' events in 2020/21 – including Turkey, Bahrain, Austria and The Netherlands – all of which have all benefitted from a boost in popularity. The race enjoying the biggest rise in fan appeal is Azerbaijan, having been witness to a number of memorable races since its first appearance in 2017.

While the established events in Hungary and Mexico continue to enjoy ratings of between 5%-7%, the Grands Prix in China and Russia have yet to capture significant appeal among F1's global audience. In the 2021 survey, they each recorded a rating lower than that of Miami, which is yet to host an event.



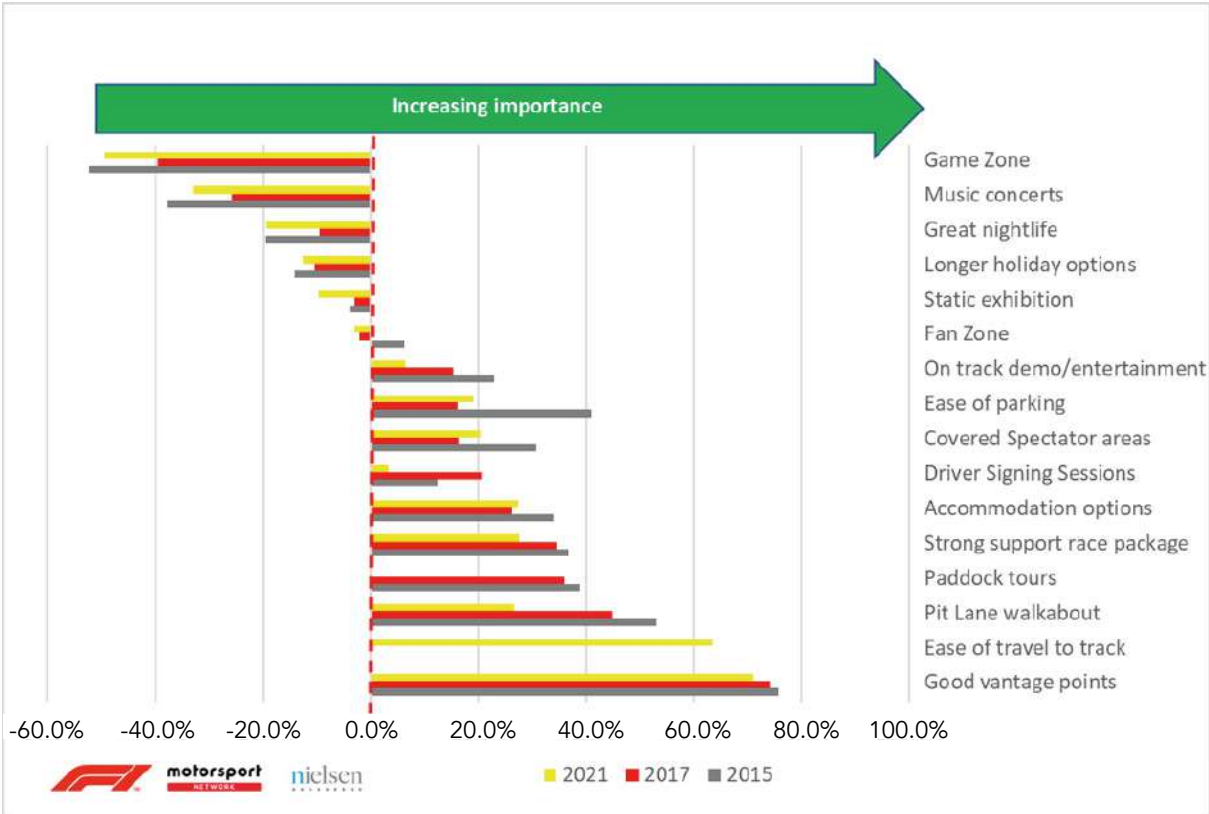
**The F1 Promoters Guide –
[1] Grand Prix Features**

While global F1 fans predominantly enjoy the sport through third-party media channels; F1 continues to attract significant event attendees, driving competition among nations, regions and cities to join one of sport’s most exclusive clubs. With over 18,500 respondents to the 2021 Study hailing from Europe, Americas, Asia-Pacific, Middle East and Africa having attended at least one GP in the past five years, their feedback provides F1 promoters with an invaluable insight into key GP features – including ticket pricing information – to drive increased attendance for the future.

The table below illustrates the relative importance of event features in attracting fans – the most important factors being ease of travel and on-event parking, good vantage points for race viewing, F1 Pit Lane & Paddock access, together with a strong support race programme and a good range of accommodation options. Interestingly, feedback among the Study’s audience of predominantly avid fans shows the relative low importance for additional event entertainment – such as live music concerts – which have become a regular feature for some rounds of the F1 Calendar in recent years.

The classic races Monza, Spa, Silverstone and Monaco are important to fans of all ages

Chart 6.4 | GP Features Influencing Attendance (2015-2021)





[2] Grand Prix Ticket Pricing

In 2021 we once again explored the impact of ticket pricing on fan attendance at F1 events and compared this to previous findings from 2015 and 2017. We used a benchmark of a three-day General Admission Adult Ticket with fans asked to state their opinion on prices in either £, € or \$ representing:

- Good Value
- Reasonable Value
- Expensive
- Too Expensive

Good Value

21.2% increase (5.3% pa) from \$96.99 to \$117.53

Reasonable Value

20.8% increase (5.2% pa) from \$120.72 to \$145.82

Expensive

50.0% increase (12.5% pa) from 163.15 to \$244.75

Too Expensive

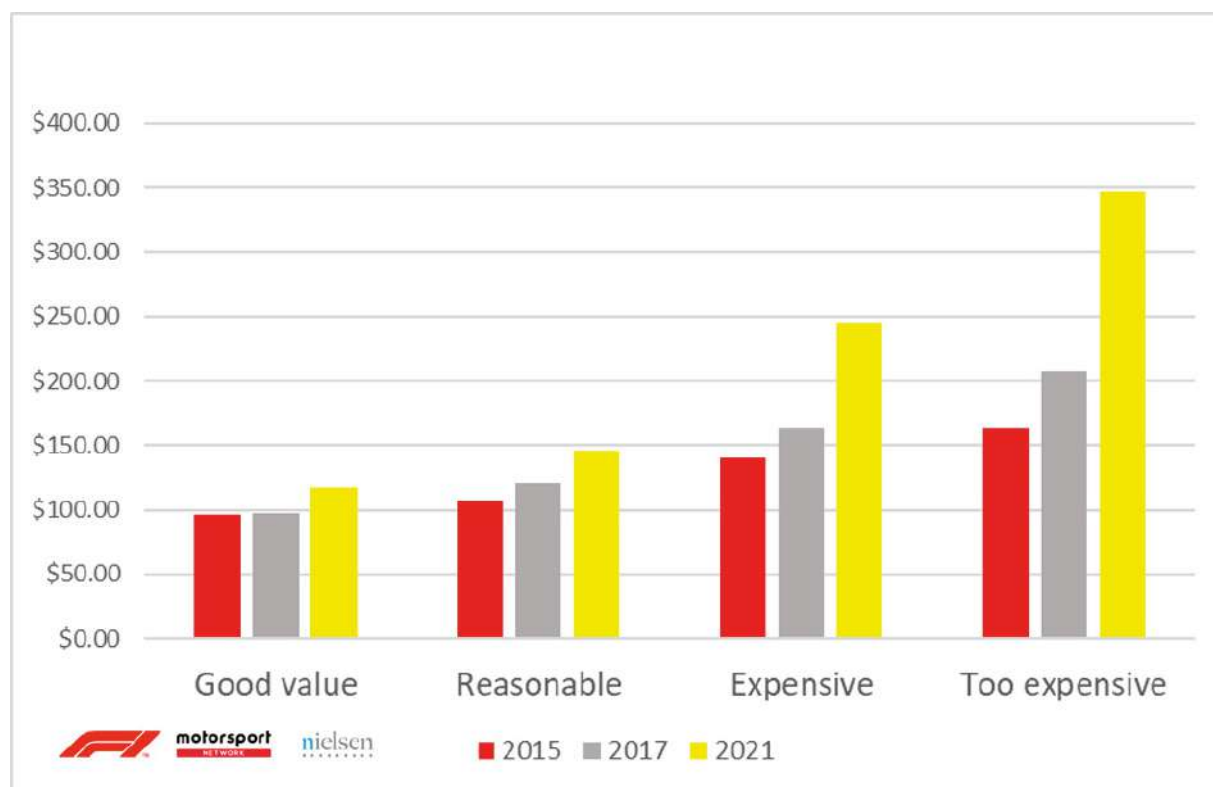
66.5% increase (16.6% pa) from \$208.17 to \$346.62

Responses were collated and converted into a standardized US\$ measure based on prevailing exchange rates.

In the period between 2017 and 2021 we recorded fans' willingness to pay rise by between 20% - 65%.

On average, expectations rose as follows:

Chart 6.5 | GP Ticket Pricing - 3 Day Adult Ticket (\$) (2015-2021)





F1 Media Landscape

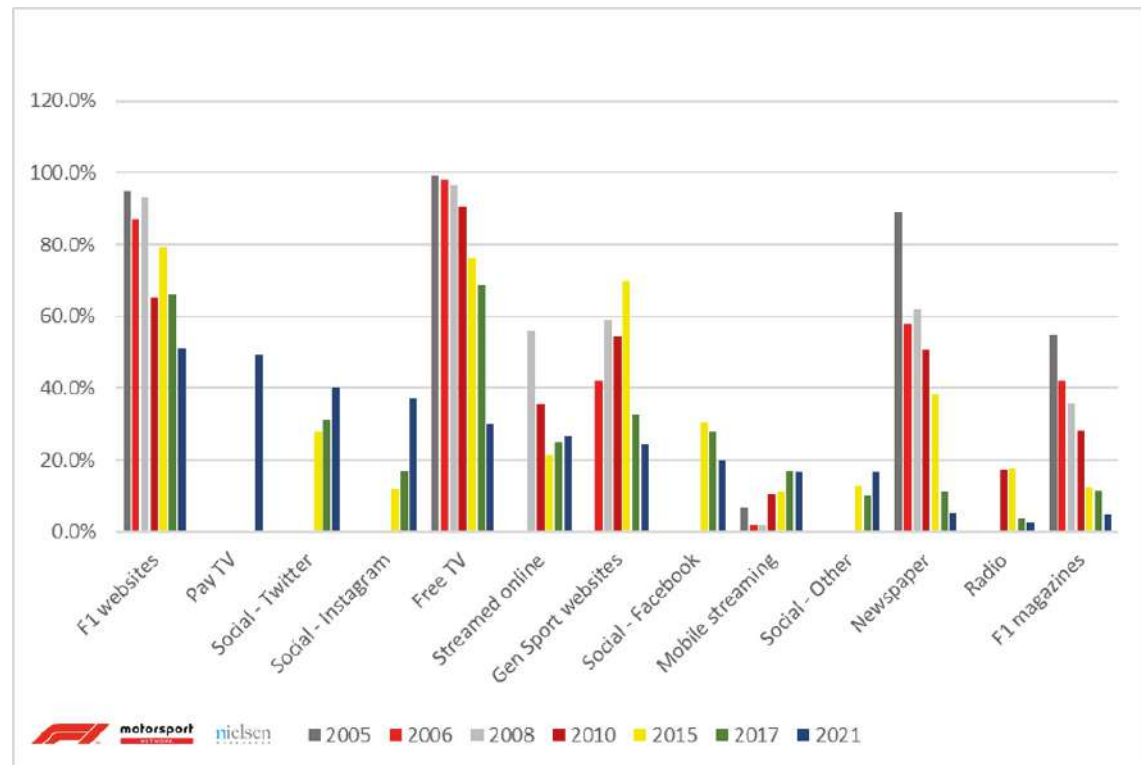
Written by: Jessica McFadyen

Director of Digital Strategy, Motorsport Network

How F1's audience is totally 'tuned in' to the sport

- Specialist F1 websites and Pay TV are the most used destination for content, especially among fans aged 35+
 - Free-to-air F1 TV viewing declines (56%) since 2017
 - Twitter continues as #1 most used social platform, closely followed by Instagram, which is #1 most used channel among 16–24-year-olds. Facebook usage has declined
 - Most respondents (85%) are watching more than 13 GPs per season. Over 85% of fans watch full race content from lights to flag, no decline in viewing duration among younger audience
 - For the future fans overwhelming call for watching full race coverage via Live TV or Streaming
-

If the 2021 Global F1 Fans Survey tells us anything, it is that the strategy of F1 management as well as the teams and drivers to engage new audiences via digital and social media is working. The success of Netflix "Drive to Survive" behind the scenes documentary series has been to open the sport up to new, younger and more diverse audiences, making the sport more accessible. And the funnel is then working as new fans engage with the rich social media content served up by F1, the teams and drivers as well as by independent media platforms. It is also clearly a contributory factor in the rankings this time on favourite drivers and teams.

Chart 7.1 | Formula 1 Media Consumption Habits (2005-2021)

Media Consumption By Platform

Pay TV and specialist motorsport websites are the leading platforms for fans to access F1 news and information both during and outside of GP weekends, with over 50% of fans regularly accessing these media channels for their F1 related content.

However, the main shop window for the on track action is live television and the percentage of fans accessing F1 through free-to-air television, which had been declining slowly since 2005, experienced an accelerated rate of decline since the 2017 – with the number of fans regularly using free-to-air TV as a source of their F1 content falling by half to under 30%.

In terms of regional variances, the study showed that fans in the Americas and Middle East/Africa were more likely to frequently access free-to-air TV for F1 coverage, access was lowest in Asia-Pacific where fewer than one-in-five use this method.

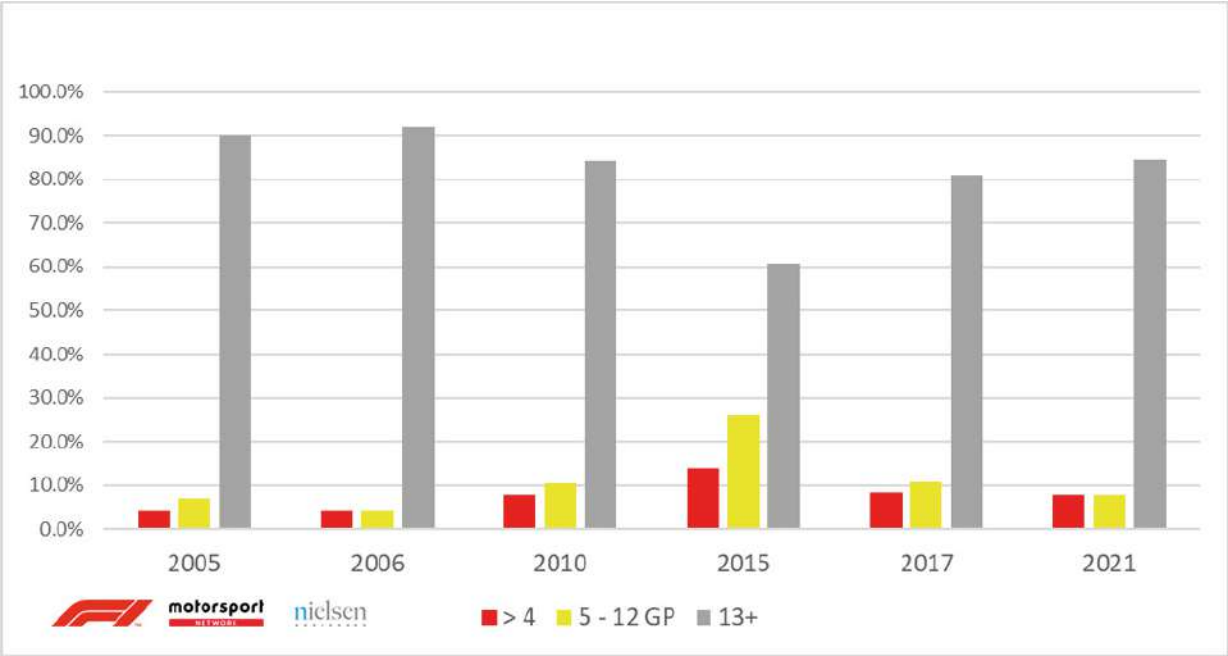
Regular fan usage of Social Media continues to increase. In 2021 just over 40% of fans regularly access Twitter, F1's most accessed platform for their F1 information needs – up from 31% in 2017. Instagram recorded the largest individual service growth since 2017, more than doubling its F1 active audience from 17% to 37%. Facebook's usage among F1 fans declined by 40% to 20%.

Along with free-to-air TV, traditional media platforms – particularly newspapers and radio – together with General Sports websites continued to suffer from sharp declines in usage.

General Sports websites declined further in 2021, down from a third (2017) to less than a quarter in 2021. Print media – including newspapers and specialist magazines – continued to decline in usage; now standing at 5.2% and 4.9% respectively. Radio declined further to 2.6% usage.

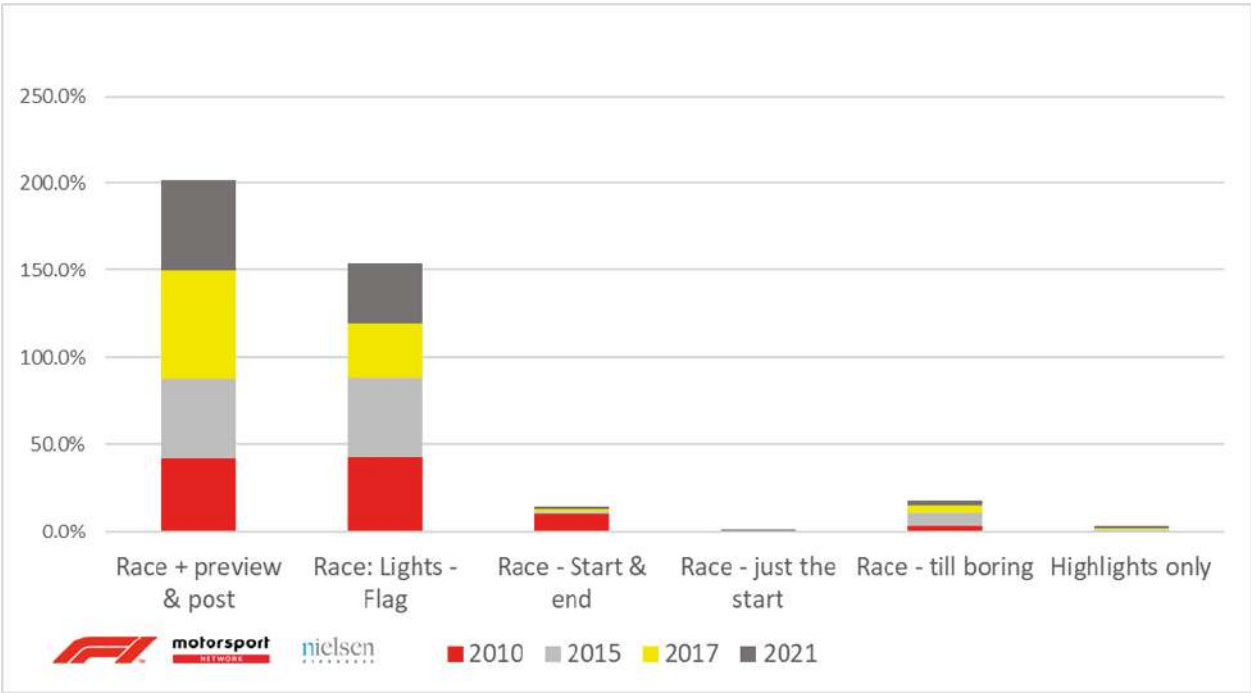
The most important media platforms for Formula 1 are undoubtedly TV, both paid and free-to-air, and specialist websites.

Chart 7.2 Number of GPs Watched by Season (2005-2021)



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 (2010-2021)





Over the F1 race weekend

TV leads the way with 80% of fans habitually accessing TV for their F1 content. Frequent usage increases to nearly 100% when we include use of streamed content. In contrast, 51% of fans use specialist motorsport websites frequently for news and information over an F1 race weekend.

Pay TV usage is at its highest in the UK, Australia, France, Germany, Spain and Poland and at its lowest in the United States, Canada, Turkey, India, Mexico and Brazil. Corresponding those markets show the highest uptake of free-to-air TV.

Over 50% of fans regularly access specialist motorsport websites during the F1 weekend with usage being highest in Japan, France, Turkey, Poland and Mexico. Accessing of specialist websites over the F1 weekend is at its lowest in UK, Australia and Spain.

Outside of the GP weekend

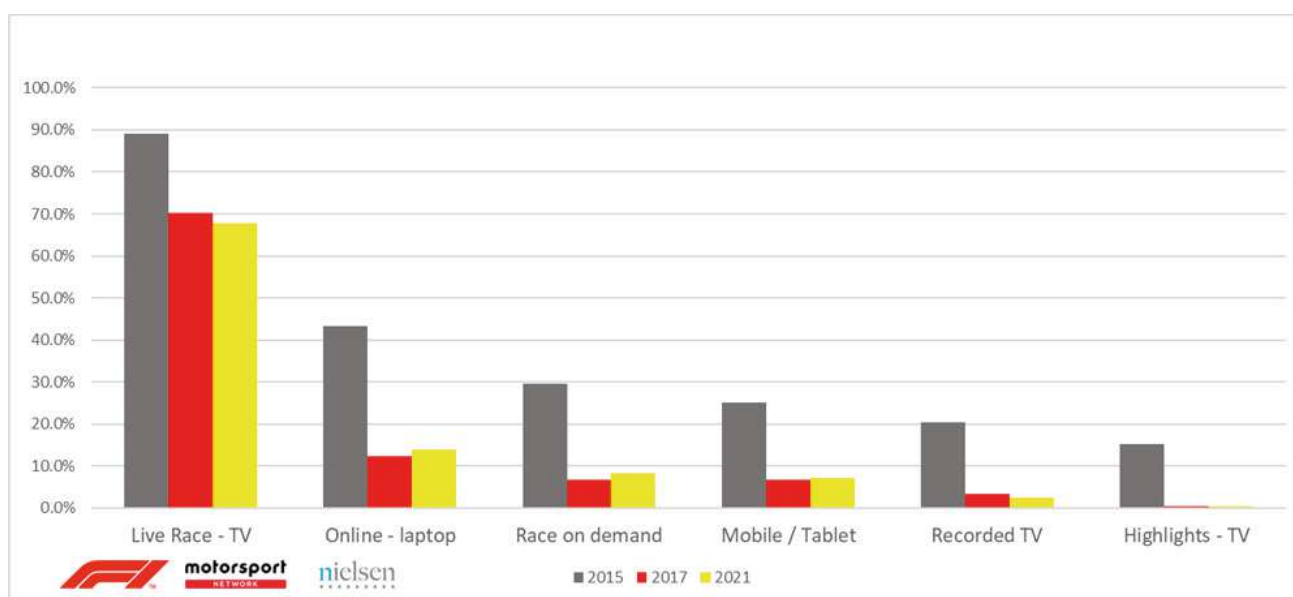
Unsurprisingly, the usage of all media channels falls outside of F1 race weekends as specialist websites and social media platforms overtakes TV, both paid and free-to-air, in usage.

Specialist websites continue to enjoy high levels of usage with over 40% of fans frequently accessing them for F1-related content. While social media access declines slightly from race weekend levels, Twitter and Instagram especially maintain the bulk of their audience – both recording 35% frequent usage outside of the F1 weekend.

Nearly 85% of the fans surveyed watch more the 13 Grands Prix on television per season – continuing the increase from 2015 and '17 studies and is further evidence of the sport's improving perception and appeal – together with the gradual shift towards acceptance and penetration of Pay TV among the fanbase.

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

Chart 7.4 | Fans' Future Viewing Preferences (2015-2021)





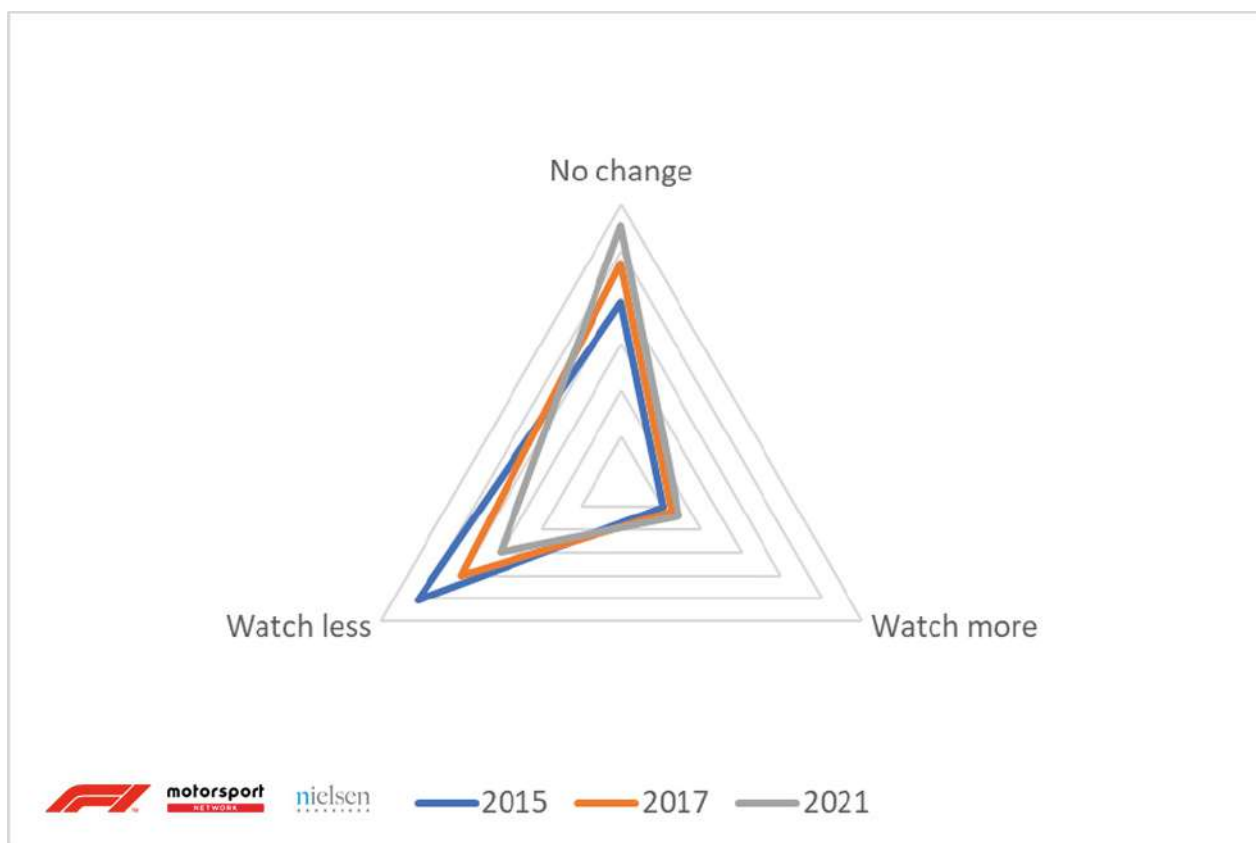
Fans are prepared to commit significant time engaging with the sport, with nearly 90% of fans watching an entire race from lights to flag. It is also noteworthy that there is no noticeable decline in viewing duration among the younger F1 fanbase; with 88% of fans aged 16-34 watching the full race.

Future Viewing Preferences

Mirroring our work in 2015 and '17, we again captured fan feedback on how fans wish to consume F1 in the future. We pushed for a definitive response from fans, to provide a single preference for future viewing rather than a range of possible viewing options.

Reinforcing the findings from 2017, fans displayed a clear preference for viewing F1 live on TV with over 95% stating a preference for full race live coverage either via TV or digital streaming. Recorded race or recorded highlights has a very low of support at 2.5%

Chart 7.5 | Impact of Pay TV On Formula 1 Viewing (2015-2021)





F1 Competitors

Written by: Oleg Karpov

F1 Network Editor, Motorsport Network

Big changes in the F1 popularity contest

- Max Verstappen is F1's most popular driver, closely followed by Lando Norris with Lewis Hamilton in third
- Max popular within the 25-45 age range, with Lando enjoying strong support among female fans and fans aged 16-24. Lewis scores strongly in 45+ age group
- Verstappen ranked #1 in the US, Japan & Netherlands with Hamilton ranked # 1 in the UK, Brazil & Canada
- Daniel Ricciardo is fourth ahead of Sebastian Vettel in fifth
- F1's crop of young stars – Lando Norris, Charles Leclerc, George Russell and Pierre Gasly – all score well
- While over two-thirds of fans support a number of teams and drivers, McLaren's popular driver line-up helps secure the support of nearly 30% of respondents – making it F1's most popular team
- Red Bull Racing is boosted by Max's popularity rise to second place in the team ranking, with Ferrari falling back to third – the first time it has not been F1's favourite team in our surveys

F1 is non-tribal

One of the most interesting learnings from the Global F1 Fan Surveys is that Formula 1 continues to engage fans on a sport-first basis, in sharp contrast to most team-based sports, especially ball sports. F1 fans are not typically, or overtly, tribal in their support.

Nearly two-thirds of F1 fans follow a number of teams and drivers, and while there is a slight preference among fans to favour drivers over teams, the overall effect is minimal. However, as the results of the 2021 Survey show, there is evidence that a well-liked driver line-up can have a significant impact on overall team popularity.

Max Verstappen registers strong support across all age groups and all geographies



Drivers

One of the biggest news stories to come from the 2021 Global Fan Survey is the rise of the younger generation of F1 stars, whose appeal to the new, more diverse and social media savvy audiences is growing rapidly.

In 2017, we noted the rise in popularity of Dutch driver Max Verstappen. In 2021, he now ranks as F1's favourite driver, with one third of F1 fans placing Max in their Top 3 drivers and 14.4% declaring him as their favourite. Although his orange army of fans at races is highly visible, this result is not driven by local partisan forces; Max registers strong support across all age groups and all geographies. He is particularly popular in the US and Japan as well as the Netherlands. His popularity is not exclusive to the younger audience; he also scores highly in the 35-54 age group.

Marking his spectacular arrival into F1, Lando Norris has grabbed fan attention and appeal in quite astonishing fashion. While yet to win a race in Formula 1, over 40% of fans placed Lando in their Top 3 favourite drivers, with 13.7% of fans choosing him as their absolute favourite.

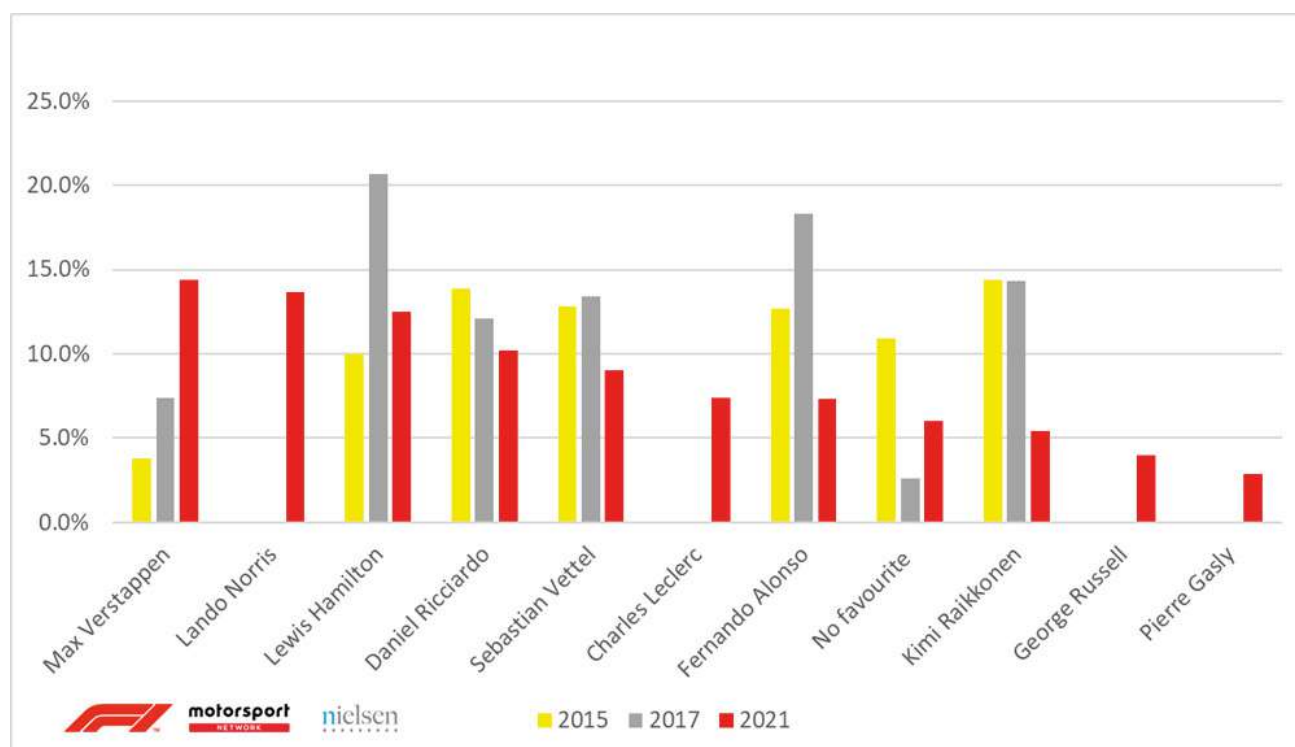
Lando has built a broad base of appeal across geographies and age groups. While not a standout leader in many markets, he ranks #2 in the UK, Germany, Australia, Netherlands and Canada. His appeal among female fans and F1's younger audience (16-24) is unrivalled – over a quarter of all female F1 fans rank Lando as their favourite and he enjoys #1 status for more than one in five of all fans aged under 25.

Although he drops from #1 in 2017 to #3 overall this year, Lewis Hamilton continues to enjoy vast support around the globe and is ranked #1 in fans aged 45+. However, his appeal – and that of fellow multiple World Champion Fernando Alonso – appears more polarized than most.

Meanwhile, Daniel Ricciardo (10%) and Sebastian Vettel (9%) enjoy continuing popularity among fans with strong home market support in Australia and Germany respectively.

The appeal of the exciting crop of young stars - under the age of 25 - provides an ample source of optimism for F1's future: Charles Leclerc, Pierre Gasly and George Russell all join Lando on the list of F1's Top 10 most-popular drivers.

Chart 8.1 | Formula 1 Driver Ranking (2015-2021)





Teams

Aided by the popularity of its driver line-up, the 2021 Global Fan Survey recorded a significant shift in team popularity towards McLaren, whose on-track renaissance mirrored its off-track appeal. McLaren's popularity among fans nearly doubled from 15.8% in 2017 to 29.5% in 2021.

McLaren recorded nearly 50% popularity among female fans, while 40% of the 16-24 age group ranked them as their #1. It was the top-ranked team in the UK, US, Australia, Canada and Brazil. Regionally, McLaren was ranked #1 in Europe, The Americas and Middle East & Africa – falling to #2 in Asia-Pacific behind Red Bull Racing.

Red Bull continued its impressive record of improving popularity in every study since 2008. In 2021, RBR was ranked as the favourite team by nearly one in five of all F1 fans, up from 14% in 2017. This popularity was driven by very strong support in Japan (home of engine partner Honda), The Netherlands and Mexico.

As a result of the moves by McLaren and Red Bull, the popularity of Ferrari and Mercedes dropped – the two most-supported teams in 2017 became #3 and #4 in 2021. And while local support in Italy and the UK – coupled with driver support in France, Spain and the UK – helped bolster their position, ultimately their driver appeal couldn't match the approval ratings of the line-ups at McLaren and Red Bull.

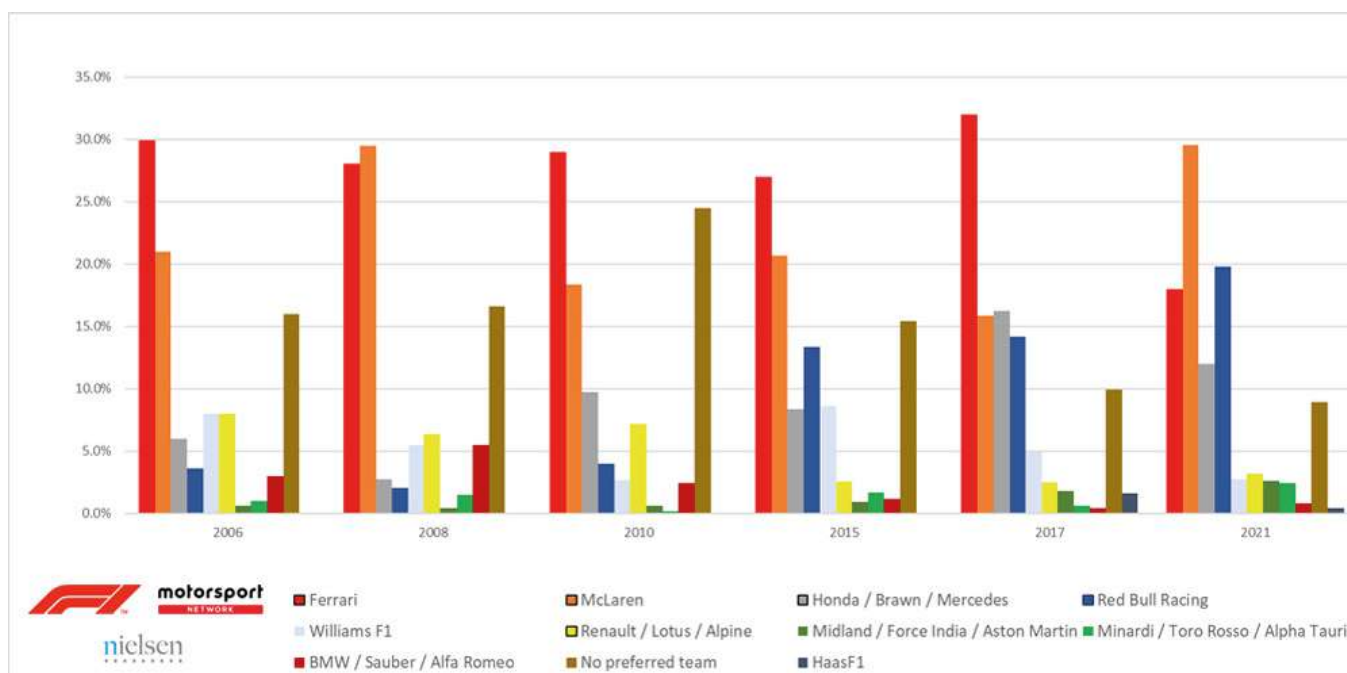
In each of our previous studies, Ferrari's support and popularity has been truly global, leading to it being the #1 ranked team in each study undertaken since 2006. However, that position of leadership in 2017 – with 32% global preference – is now at 18% which placed it third in overall team popularity in 2021. Previously, Ferrari ranked #1 most popular team in every major region. In 2021 it has country market-leadership in France, Spain, Turkey and, of course, Italy.

Mercedes' popularity, meanwhile moved from 16.2% in 2017 to 11.9% in 2021.

Beyond the clear top four positions, notable improvements in popularity were recorded by Alpine and by the Aston Martin team (which was called Force India in the 2017 survey). AlphaTauri recorded the largest overall percentage increase, Red Bull's sister team quadrupled its fan support to 2.4% – driven by the popularity of both Pierre Gasly (#1 ranked driver in France) and newcomer Yuki Tsunoda.

Support for Williams and Haas fell against the 2017 numbers, while Alfa Romeo remained relatively unchanged at 0.8%.

Chart 8.2 | Formula 1 Team Ranking (2006-2021)





F1 Sporting Regulations

Written by: Ben Anderson
Editor, GP Racing

Fans want sustainable fuels, but no gimmicks in format

- Two-thirds of fans are aware of F1's drive towards introducing sustainable fuels by mid 2020s. Fans identify being a world leader in developing sustainable fuels as F1's #1 priority – outscoring all other sporting considerations
 - All markets show strong awareness (67%) of F1's sustainability ambitions, awareness peaks in UK, Germany, Netherlands, India and Brazil
 - Fans support moves for less Stewards' involvement, except in regards of dangerous driving
 - Continuing support for competition between tyre suppliers, especially among fans 35+; this group also support a return to refueling
 - Sprint races are viewed as having marginally improved the F1 show but fans do not want them introduced at every race
 - Fans continue to dismiss perceived artificial race manipulation – reverse grids, success ballast, technical freeze
-

The F1 Global Fan Surveys have a long track record of aggregating fan opinion and initiating dialogue and sporting changes within the sport.

In 2021 the standout feedback from fans was the need for Formula 1 to be seen to be taking a lead in developing sustainable fuels.

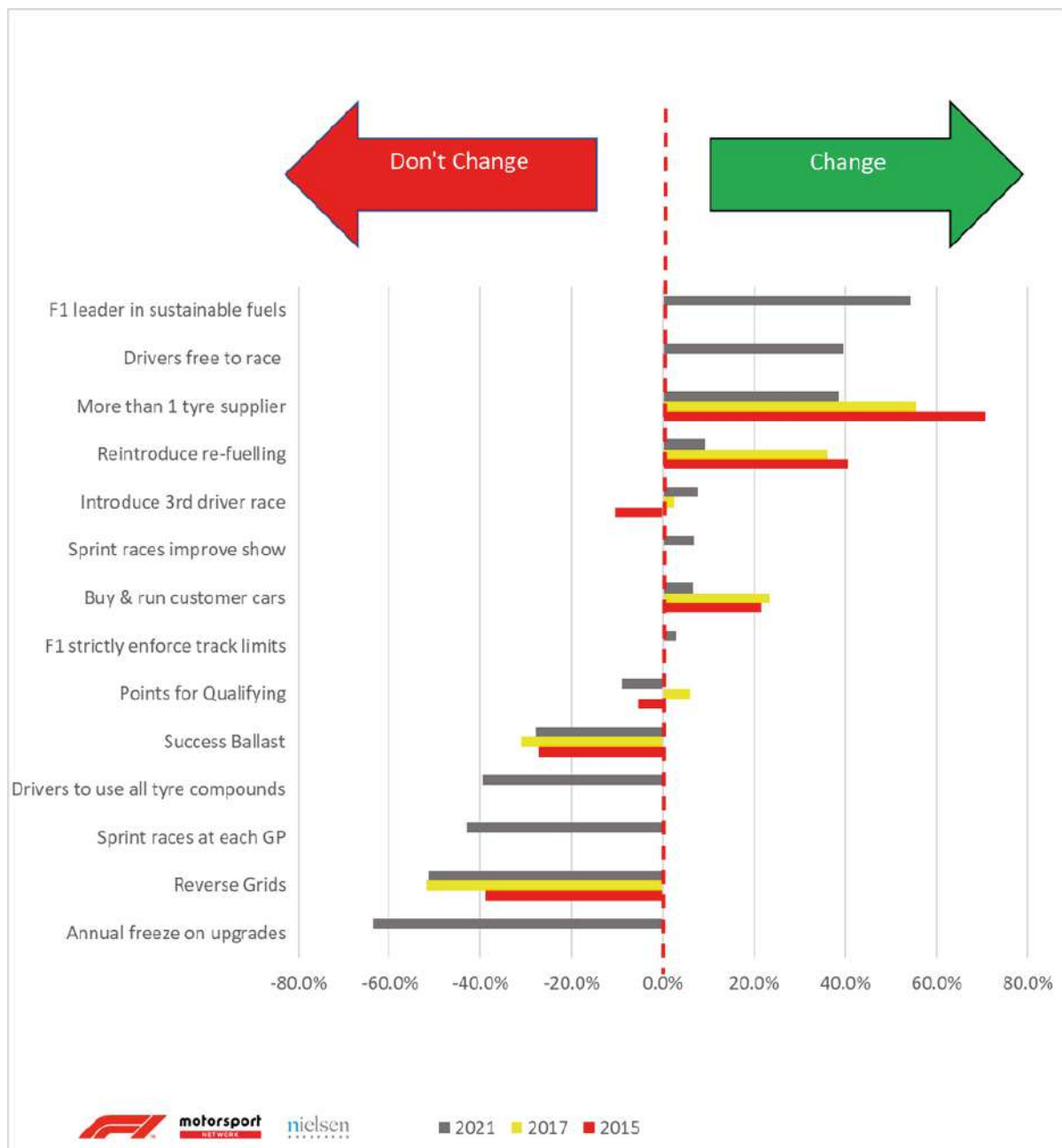
In November 2019, Formula 1 announced an ambitious sustainability target of becoming net carbon zero by 2030. The introduction of E10 biofuel in 2022 is the first step in a development programme to introduce sustainable fuels by the mid-2020s and adopt third generation 100% synthetic biofuel by 2030.

Fans were asked both for their awareness and reaction to the initiative:

In terms of awareness, two thirds of F1 fans are aware of the commitment to introducing sustainable fuels by the mid-2020s. Awareness was high (67%) in all major markets and geographic regions; peaking in UK (71%), Germany (74%), Netherlands (71%), India (74%), Poland (72%) and Brazil (72%). Awareness was slightly higher among males (68%) and within the 16-24 age group (68%).

In terms of importance, fans were asked to express their opinion on a number of sporting issues including the importance of F1 being a global pioneer in the development of sustainable fuels. Fan feedback ranked this as F1's #1 sporting priority with 66% of fans agreeing with the statement and only 12% disagreeing – the net positive result of +54% was the strongest of all results tested.

Chart 9.1 | Fans' Preference for Formula 1 Sporting Changes (2015-2021)



In addition to leadership in the development of sustainable fuels, fans' opinion split into three broad categories:

Strong Support

- Leave drivers free to race without intervention, except for dangerous driving +39.5%
- Introduction of more than one tyre supplier +38.5%

Note: Support for the introduction of more than one tyre supplier continues to decline from 2015 (70.6%) to 55.5% in 2017. The strongest support for the change is in the 45-65+ age group.

Uncommitted

A continuing theme from our previous studies highlights a number of areas where fan reaction is split:

- In-race refueling to be reintroduced + 9.3%
- An additional third driver race should be run each GP weekend + 7.7%
- Introduction of Sprint race has improved the show + 6.7%
- Teams should be able to purchase and run customer cars + 6.5%
- F1 should strictly impose track limits + 2.9%
- Points should be awarded for Qualifying (outside of Sprints) - 9.1%

In terms of trends, the appeal for the re-introduction of in race refueling, buying and running customer cars and points awarded for qualifying are all declining; with a small increase in the appeal of a third driver race at each GP. In the case of in race refueling, observing track limits and operating customer cars – like the reintroduction of tyre competition – these developments are supported most by male fans and those aged 35 and over.

No Support

As with previous F1 Studies, any interventions which are viewed as artificially manipulating or influencing the racing spectacle are widely disliked by fans, as is any initiative that reduces pioneering technology and/or innovation in F1.

- Introduction success ballast (handicap system) for winning teams -27.8%
- Force drivers to use all three tyre compounds at each race -39.4%
- Introduce Sprint races at every GP -43.0%
- Introduce reverse grid system -51.5%
- Annual freeze on car design -63.5%



Gaming and Esports

Written by: Luke Smith
F1 reporter, Autosport

Online gaming grows in appeal

- Over 50% of respondents regularly engage in motorsport gaming, with participation highest (61%) among the 16-24 age group and fans in Asia-Pacific & Europe more actively engaged
 - Male fans (59%) are three times more likely to engage than female fans (19%)
 - Console-based gaming remains the most popular platform for over 60%+ of all respondents; scores particularly highly among fans in 35-44 age range
 - Online gaming participation has increased by over 50% since 2017
 - Viewing and participation in online esports leagues remains in its infancy. The F1 Esports League dominates, but attracts < 25% viewing among esports engaged fans; interestingly female fans record higher viewing figures than males (30% vs 24%)
 - Participation in Esports Leagues is low across the board, with the F1 Esports League the market leader with only 1.9% engagement
 - The Official F1 2020/21 game increases its dominance in both engagement and preference
 - F1 2020/21 was played by over 70% of gamers, 2.5 times more than its nearest competitor, Gran Turismo. It is also the gamers favourite title with over 46% placing it at #1; more than 3.5 times more popular than its nearest competitor
-

One of the fastest growing sectors of motorsport is gaming and esports. F1 lends itself ideally to gaming for several reasons: it is followed globally and fans can race against each other across geographies in real time, plus the controls used by the gamer or esports competitor are identical to a real F1 driver – steering wheel, gearshift paddles, brakes and throttle.

Because simulation an important part of a Grand Prix driver's life, the younger F1 racers are especially active in esports leagues and competitions. During the Covid-19 pandemic, many leading F1 drivers participated in virtual esports races, particularly Virtual F1 Grands Prix and the 24 Hours of Le Mans Virtual, competing against regular gamers.

The 2017 Study was the first to survey fans on engagement with the motorsport gaming and esports sector, and not surprisingly the 2021 survey shows growth in this sector. But it has to be filtered carefully as the 2021 response has a far larger make up of female respondents, and females are significantly less engaged in playing games and esports. However, they do show a higher propensity than males to watch esports competitions.

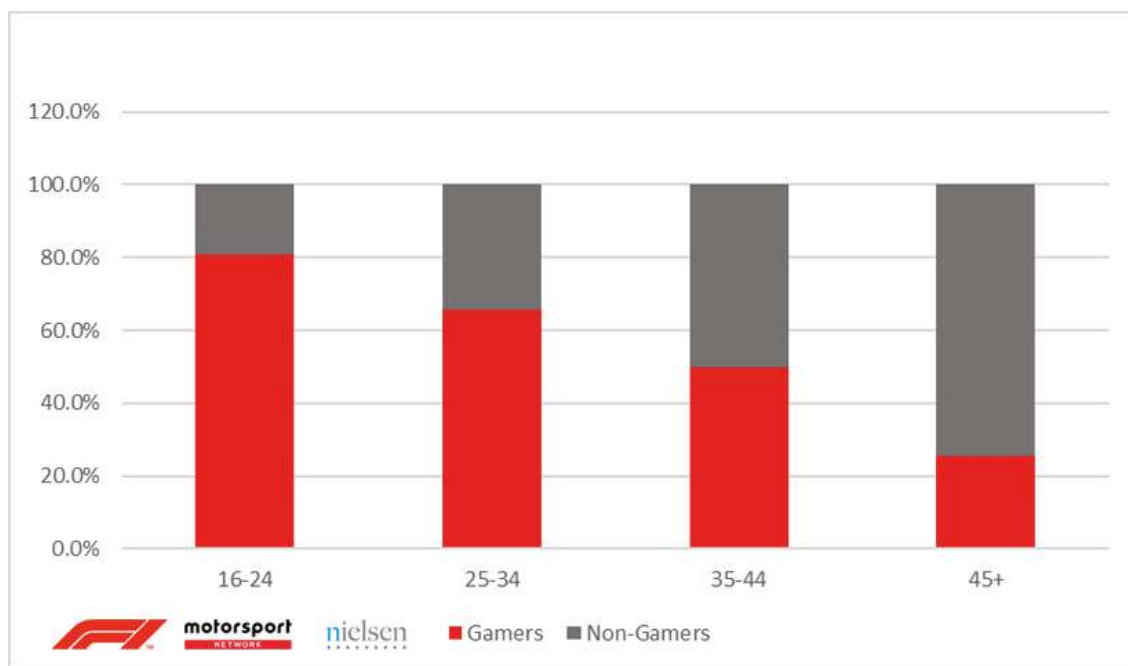


In terms of gaming platforms, we recorded a shift away from console based to online gaming.

Console-based gaming remains by far the most popular format for esports, with nearly two-thirds (63%) of participants engaged via their PlayStation, Nintendo or Xbox; down from the 2017 usage of 75%. However, online gaming via computer has increased sharply from 29.5% in 2017 to 45% in 2021.

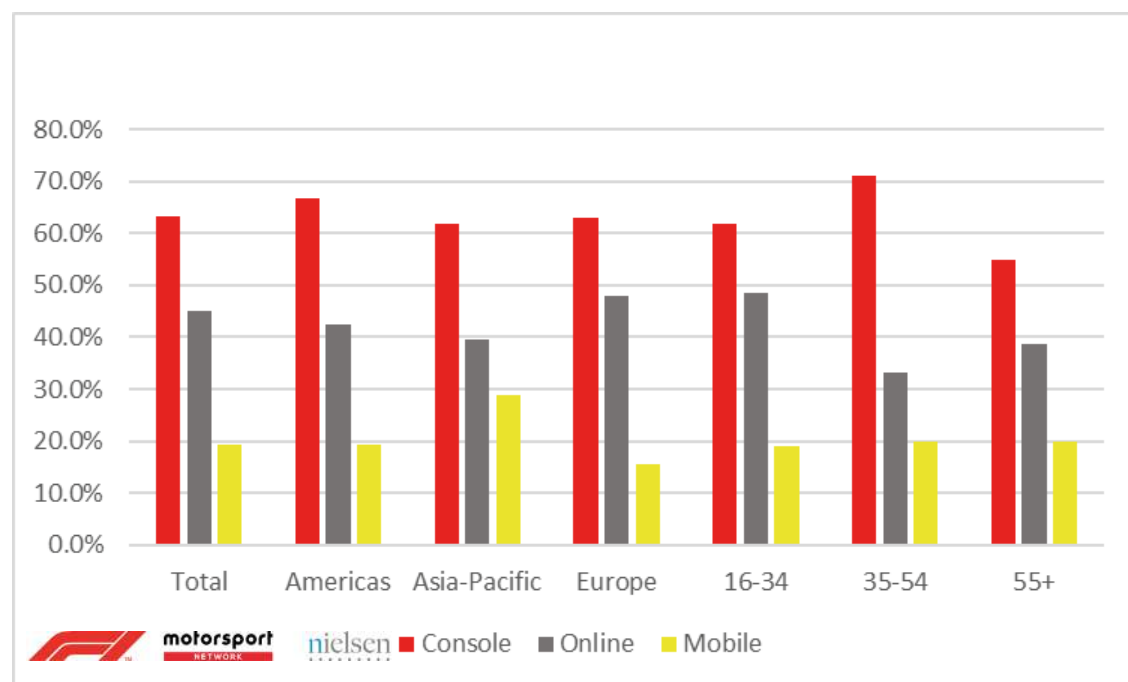
In common with the results from 2017, most F1 fans who engage in esports do so on an individual basis; this covers 90% of motorsport gamers – similar to the gaming patterns recorded in 2017. The incidence of active involvement in online leagues or multi-player gaming with friends remains constant from 2017 at 11.8% and 32.6% respectively.

Chart 10.1 | Motorsport Gaming Audience by Age Profile (2021)



In 2021, 30.0% of fans viewed esports racing online. The F1 Esports Series is the dominant market leader with 24.2% of the sample viewing in the past 12 months. Other well-supported series were FIA Gran Turismo Championships (5.3%) and Le Mans Esports Series (4.8%). Formula E's Accelerate Series was the fourth most watched with 2.1% viewership in the past 12 months.

Chart 10.2 | Esports Gaming Platform by Region and Age Profile (2021)

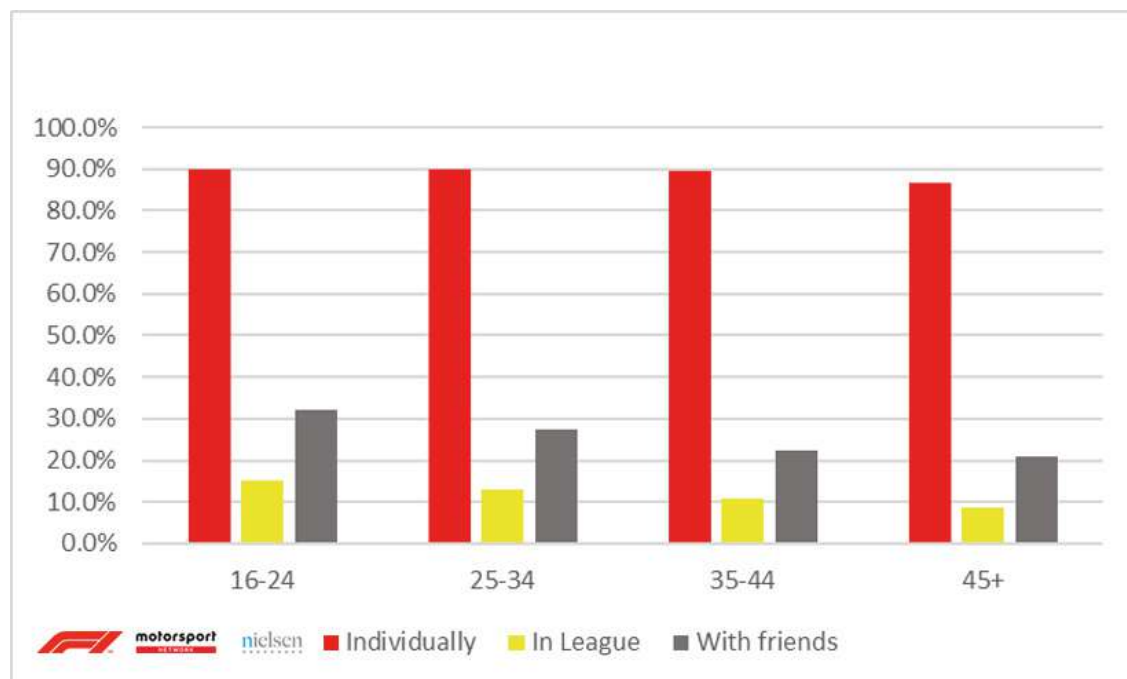




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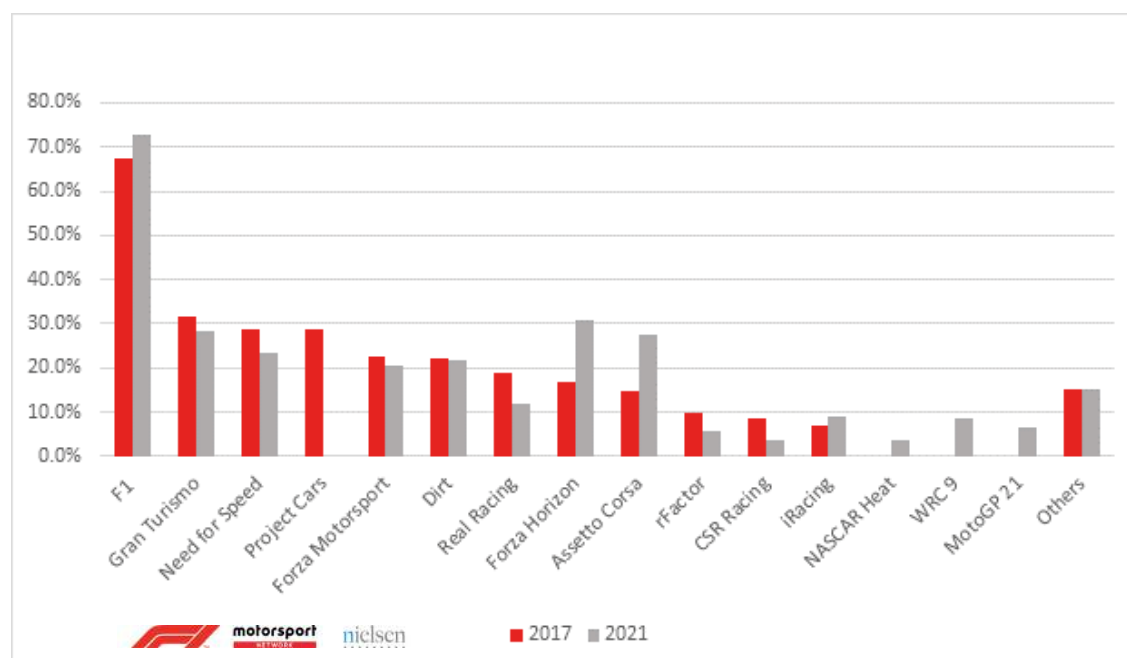
LE MANS
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 motorsport
IMAGES

Chart 10.3 | Gaming Environment/Player-Mode (2021)

Looking at the breakdown by age; the highest level of engagement are in the 16-24 age group at 39.2% – of which 33.7% viewed the F1 Esports Series. And while esports participation was markedly lower among our female audience, female fans showed a higher interest in viewing esports content than their male counterparts. Viewing of the F1 Esports Series among female fans was recorded at 30.4% compared to 23.9% for males. While 30% of the Survey respondents had engaged in esports viewership in the past 12 months, active participation was only 4% of fans in the last year. The only series to register any notable active participation among the survey sample were F1 Esports Series (1.9%) and FIA Gran Turismo Championship (1.8%).

In terms of the individual gaming series played by fans, the official F1-licensed series continues to dominate the market in terms of both market penetration and preference. Continuing its market dominance from 2017, we recorded that 72.3% of fans had played F1 2020/21 in the past 12 months, with 46% of them ranking it as their #1 game – more than three and half times as popular as the second-placed title Gran Turismo (13%). Notable increases in market penetration and preference were recorded for Forza Horizon (31% played / 9% favourite) and Assetto Corsa (27% / 7%).

Chart 10.4 | Esports Titles played (2017-2021)



2021 Survey Key Statistics

The 2021 Global F1 Fan Survey was commissioned, created, governed and delivered by Motorsport Network between August and October 2021.

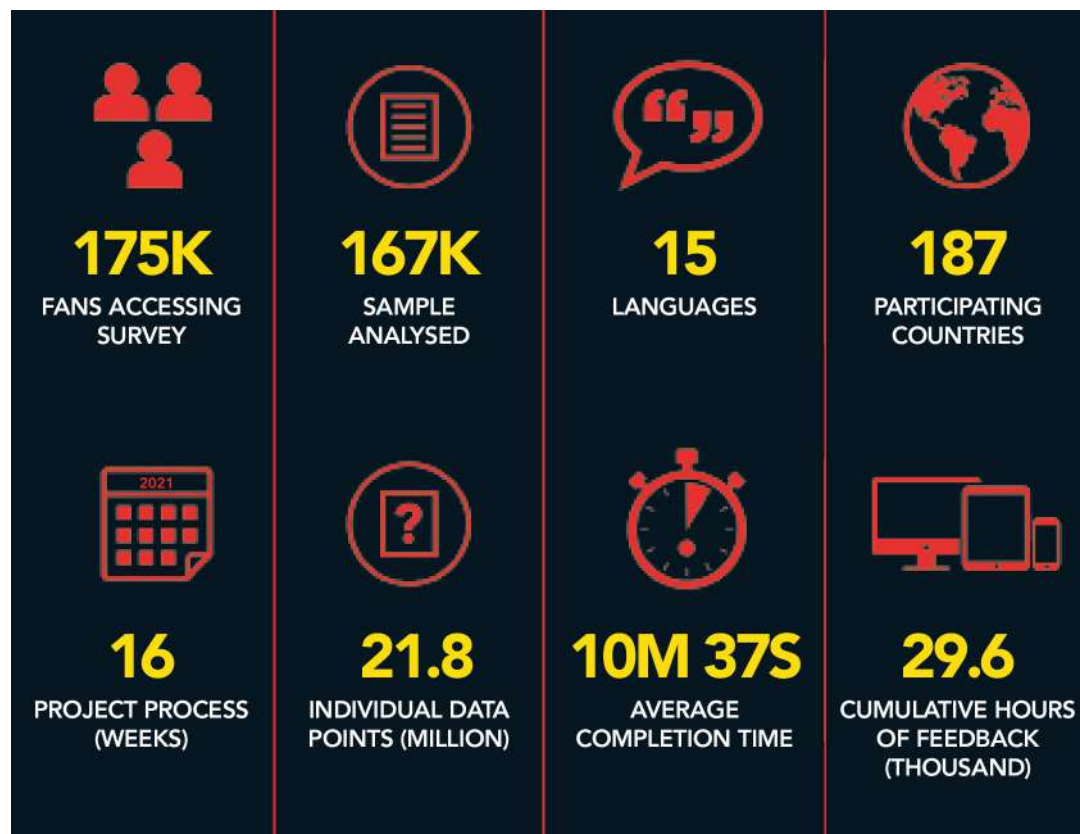
This Study builds on Motorsport Network's previous work with the Grand Prix Drivers Association [GPDA] conducted in May 2015 and with the Federation Internationale de l'Automobile in 2017. It is the latest volume in a series of global fan insight programmes initiated in 2005.

The 2021 Survey was constructed, tested and translated into 15 languages. It was hosted via a common, multi-lingual website at f1-global-fan-survey.motorsport.com.

A total of 167,302 completed responses were collected and submitted for analysis; making this, the largest single sports study analysed in F1.

Survey questionnaire construction & testing, data analysis and results interpretation were conducted by industry experts, Nielsen Sports, with project planning, management, co-ordination and reporting provided by Ian Burrows of MPA Commercial. Thanks to more intuitive design, the average completion time was reduced 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 15 weeks.





About Motorsport Network

Motorsport Network is the leading independent media, interactive entertainment and e-commerce company focused on the motorsport and automotive industries and their fans. Every month, approximately 60 million dedicated users visit a Motorsport Network digital property, to buy, to learn, to be entertained, or simply to feed their passion for cars and racing. Motorsport Network sits at the heart of the racing and automotive industries and provides authoritative thought leadership as well as unique experiences for our customers. Motorsport Network puts racing and automotive enthusiasts on a journey that encompasses news and insights, events, tickets, games, and eSports, and leverages the network effect to add value to their experience. Through the use of in-house technology and modern data tools to continuously test, learn, and improve, Motorsport Network's processes, content creation, and products are constantly evolving to better serve our audience, clients, and partners.

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