

GRAND PRIX DRIVERS ASSOCIATION

Global Formula 1™ Fan Survey 2015

Executive Summary

POWERED BY REPUCOM
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CONTENTS

- 1. Chairman's Statement – Alex Wurz, Chairman, Grand Prix Drivers Association**
- 2. Foreword – Nigel Geach, Senior Vice-President, Motorsport, Repucom**
- 3. Executive Summary**
- 4. Background**
- 5. Methodology**
- 6. The global F1 audience**
- 7. How you follow F1**
- 8. The teams and drivers you follow**
- 9. Your view on the past**
- 10. Your image of F1**
- 11. Your views on F1**
- 12. What's important to you**
- 13. What you want to see changed**
- 14. What you want to see from the drivers**

CHAIRMAN'S STATEMENT

On behalf of the Grand Prix Drivers Association (GPDA) and all the Formula 1 drivers, I would like to personally thank all of you who took time to complete our Global Fan Survey.

The response was overwhelming: more than 200,000 of you replied with 52,000 man hours spent completing the biggest survey of its kind in sport. The results are staggering and the underlying message that has come out of it is clear.

Yes, Formula 1 is facing its challenges and can be improved. But you do not believe it needs a revolution and you do not want it to become an artificial show with gimmicks introduced to simply make it more entertaining.

Instead, you want the very same thing that us drivers want: pure racing amongst the best men in the best machines.

It is now time for us to look in close detail at the findings of the survey and from there work with F1's key stakeholders to make sure they listen and consider your input carefully.

In the meantime, please find attached an executive summary which reports the key findings and which we hope you will read and share.

I hope you enjoy looking at the facts as much as we did.

And remember, regardless of whether you walk, ride or drive on the road, Be safe! Road safety is no accident.

With thanks for all your input, time and insight,



Alex Wurz, Chairman of the GPDA

@GPDA_

#RacingUnited for our sport, our fans, our safety

FOREWORD

Repucom is delighted to have worked with the Grand Prix Drivers Association and Motorsport.com to deliver the biggest and most comprehensive survey of its kind in Formula One history, and to have helped the sport's fans to make their views heard.

We have collected and collated a wealth of data, so thanks to everyone who took the time to share their opinions, they have provided a rich source of information for the whole Formula One industry to consider and analyse.

As a trusted advisor in sports and entertainment intelligence, Repucom already provides a range of solutions for teams and brands active in Formula One. The GPDA/Motorsport.com survey significantly deepens our understanding of the marketplace and what fans in 2015 care about and consider important. In the coming weeks and months we will be investigating the research findings further and plan to share these with you and so help shape the future of the sport you and we love.

In the meantime, please do enjoy this executive summary.



Nigel Geach
Senior Vice President, Motorsport, Repucom

EXECUTIVE SUMMARY

You believe that the Championship structure and GP weekends are well formatted with few changes required. However, the health of the sport can definitely be improved; there is a recognized need to attract new fans and retain existing fans who are in danger of being lost to other sports. This is due to in part to changes in TV broadcasting contracts and the increasing perception of (over) influence of business interests within F1.

More than ever, F1 needs to feature the best drivers and you are looking to drivers to take a lead in engaging with fans to revitalize the sport; drive technical and sporting change to improve the spectacle and appeal of F1.

Your key areas for change in the short-term are to the sound and power output of F1 engines, with more emphasis placed on driver skill, a return to re-fueling and the re-introducing tyre competition.

There is also a desire to see increased competition through a relaxing of technical regulations and the implementation of team Budget Caps.

BACKGROUND

"As F1 drivers we share a passion and deep love for our sport with our fans...We want to give every F1 fan the opportunity to share that passion and for us to understand what they really think about us and our sport. We've heard the calls for fans to be consulted and this is our initiative to make that a reality"



MORE THAN

215,000

FANS TOOK
PART

FROM

194

COUNTRIES



15 LANGUAGES

足球

15,500

RE-TWEETS



METHODOLOGY



Online Survey
22nd May to
8th June 2015

AVERAGE COMPLETION TIME: **25 MINS 15 SECS**

217,756
FANS TOOK PART

TOTAL SAMPLE
133,000 +

(RESULTS BASED ON THIS NUMBER AND WEIGHTED TO BE REPRESENTATIVE OF F1 FANS BY REGION AND INTEREST)

TOP 10 COUNTRIES

- | | |
|-----------|----------------|
| 1.UK | 6. Netherlands |
| 2.France | 7. Australia |
| 3.USA | 8. Japan |
| 4.Austria | 9. Italy |
| 5.Germany | 10. Brazil |



FROM
194
COUNTRIES



IN
15 LANGUAGES

足球

THE GLOBAL F1 AUDIENCE



- Over half of F1 fans are between 25 and 44 years old, with an average age of 37 years.
- Over three quarters have been supporting F1 for over 10 years.



- Nearly one in four describe F1 as their favourite sport and follow it most closely.
- As well as F1, fans are also interested in the World Endurance Championship.



- One in five have been to a Grand Prix in the last 12 months.
- Attendance is most motivated by good vantage points, pit lane walkabouts and paddock tours.



- Over half watch at least 12 races a season, frequently watching the live race.
- Fans' ideal time to watch F1 races is Sundays between 12 & 3pm.
- Three quarters of fans watch the race from start to finish

HOW YOU FOLLOW F1



~90% Watch
on TV



~45% Watch
on-line



~30% Watch
on-demand



Twitter is the #1 social media platform for following F1. Jenson Button is the most followed driver

www.

F1 websites are now the #1 source for fan information (~55% vs TV ~50%)



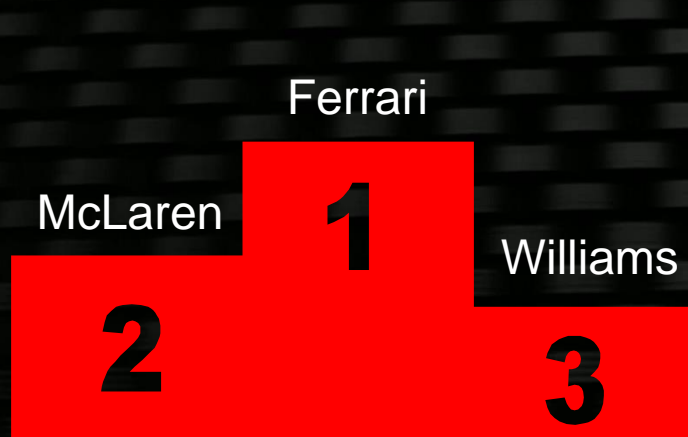
+50% of you don't watch races live since broadcasts moved to Pay Television

THE TEAMS & DRIVERS YOU FOLLOW

A third of you support
more than one team
and driver

Less than 10% of you
follow one team alone

~80% of you don't
follow a particular
driver



FAVOURITE TEAMS



FAVOURITE DRIVERS

YOUR VIEW ON THE PAST

The 2000s produced the best-looking F1 cars



1950s

3%



1960s

5%



1970s

12%



1980s

18%



1990s

20%



2000s

32%



Current

10%

Your Top 3 drivers of all time

1



Ayrton Senna

2



Michael Schumacher

3



Alain Prost

YOUR IMAGE OF F1

Less than 10% of you believe F1 is healthier now than it was 5 years ago

2015

2010

Top 3 attributes you
used to describe F1

1. Expensive
2. Technological
3. Boring

1. Technological
2. Competitive
3. Exciting

88% - F1 needs to
feature best drivers

65% in
2010

45% - F1 does feature
the best drivers

65% in
2010

85% - F1 needs to
recruit new fans

64% in
2010

YOUR VIEWS ON F1

F1 remains at the pinnacle of motorsport for many but you clearly want more competition, with business interests less to the fore

Formula One needs to be more competitive **89%**

Formula One needs to do more to attract and retain new fans **85%**

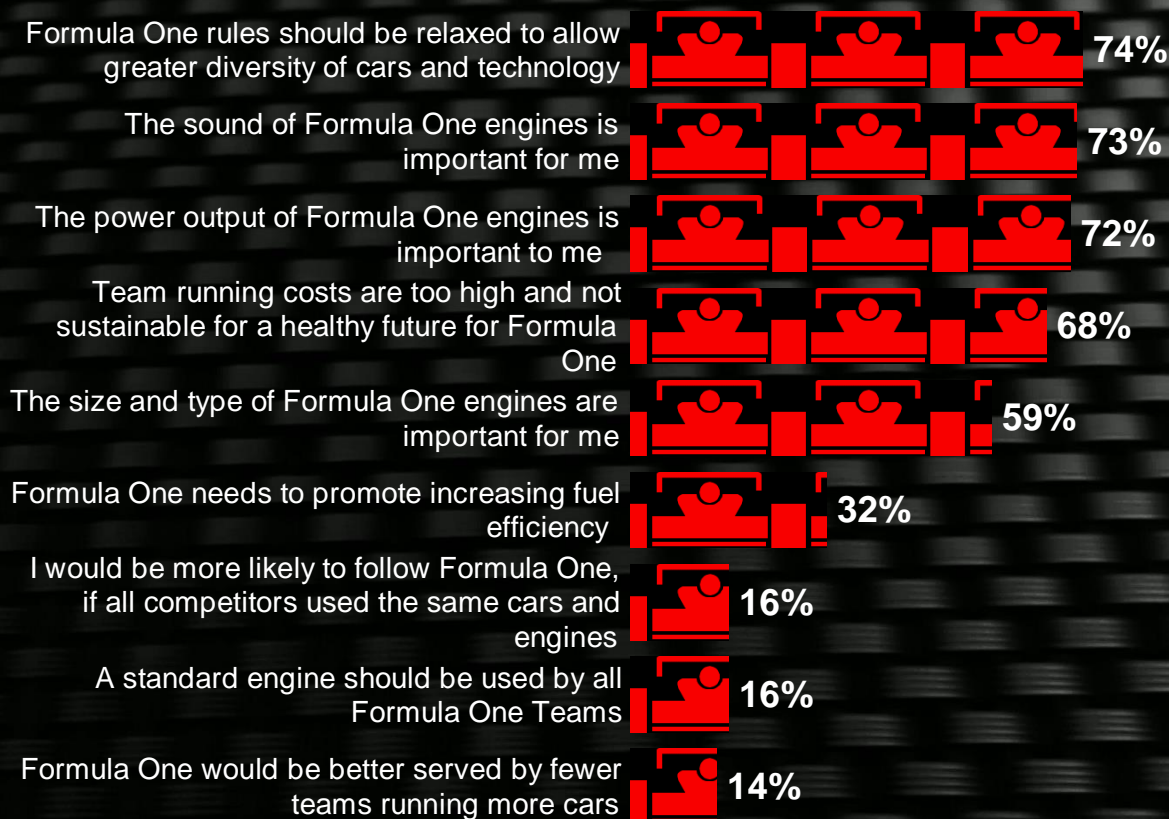
Formula One's business interests are now too important **77%**

Formula One is the pinnacle of motorsport **60%**

Formula One cars have become too easy to drive **56%**

% who say they strongly agree / agree
with each statement – Top 5

WHAT'S IMPORTANT TO YOU



The sound, power & size of F1 engines are important to you, but you share a concern that running costs are too high



% who say they strongly agree / agree with each statement

WHAT YOU WANT TO SEE CHANGE

Improving the spectacle...



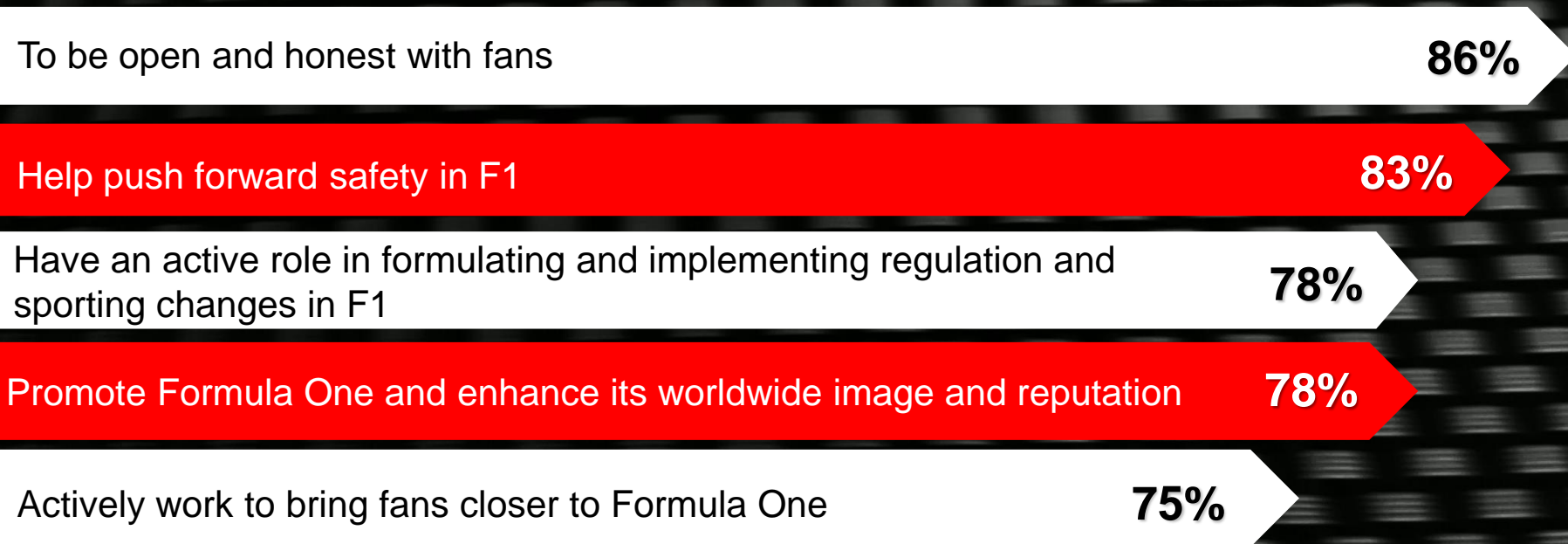
You indicate a clear desire to improve the spectacle, but not through gimmicks



% who say they strongly agree / agree with each statement

WHAT YOU WANT TO SEE FROM DRIVERS

You want to see the drivers be more open and honest, actively bringing you closer to the sport



% who say they strongly agree / agree
with each statement – Top 5

CONTACTS

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