



2025 Global F1 Fan Survey



Dear Friends,

We are immensely grateful to all the fans who have once again taken the time to share their thoughts in this survey. Your engaged and committed feedback is important, and the results show the momentum we have as a sport around the world.

As we mark our 75th anniversary, Formula 1 continues to evolve and grow. We are a truly international sport, racing in 24 destinations and in 21 countries worldwide, with a global fan base of more than 800 million. Our fans don't just watch; they live and breathe every moment on and off the track and they interact and engage with the sport in meaningful ways.

It is something we are proud of and must protect and grow. Formula 1 is rightly recognised for its elite performance and innovation, and we are clear that the only way to drive our future is through new ideas, creative content and giving our fans what they want every day of the year. As our fan base has grown, so has the breadth of the audience with newer, younger fans as well as a rise in female followers and from markets like the U.S., India, and Southeast Asia.

The data makes one thing clear. F1 is known as a trusted brand that is culturally relevant and engages with its audience in meaningful ways. It also shows that our partnerships are authentic and appeal to our fans making us an incredible platform for global brands to be part of.

Our impact is shaped by our followers – who they are, where they're from, and how they connect with the sport. We have a clear plan to maintain the progress we have and attract new interest, and we remain focused on the key priorities and opportunities we see in front of us.

We are excited about our future. As we enter 2026, we will see a new era of cars with sustainable fuel and a new team and new venue that will further improve the battle on the track. And we know our fans are excited too.

Together, we will continue to serve the best interests of our fans, as they are the heartbeat of everything we do. The passion, the energy and the adrenaline are the fuel that powers us at to give our absolute best every day.

Best wishes,
Stefano

Stefano Domenicali, President and CEO of Formula 1

2025

Global Fan Survey

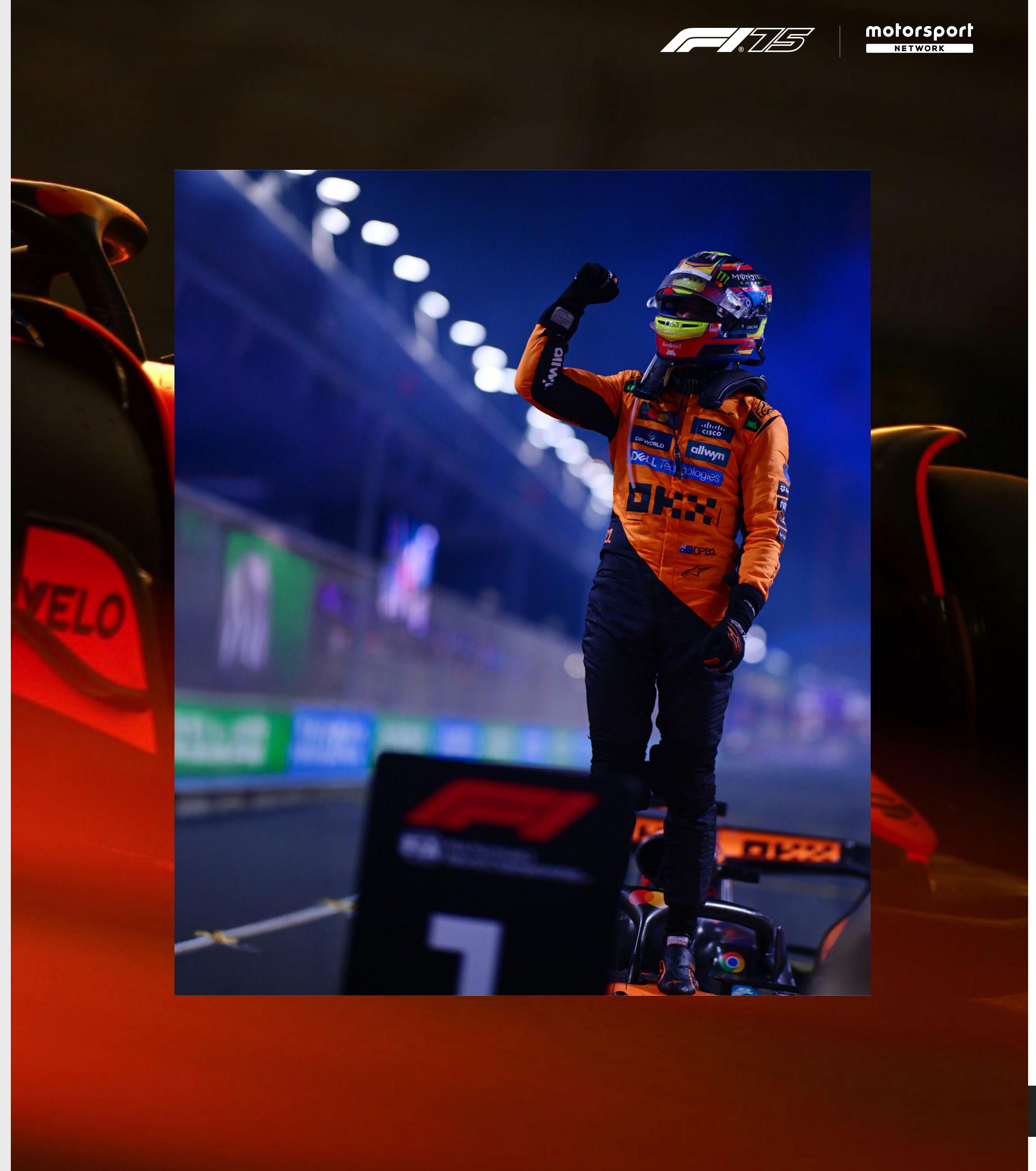


Introduction	04
Key Findings	05
01 Inside the Minds of F1's Most Engaged Fans	07
02 Emotional Motivators & Passions	16
03 Content Engagement	30
04 Live Events	49
05 F1 Academy	59
06 Culture, Lifestyle & Identity	62
07 Sponsorship Impact & Commercial Influence	72
08 U.S. Highlights	79

This white paper presents the findings of the 2025 Global F1 Fan Survey, the largest study of its kind in sport. It is conducted every four years as a partnership between Formula 1 and Motorsport Network. With more than 100,000 self-identified fans participating across over 185 countries, this survey offers a comprehensive view into how F1 fandom is evolving—what these avid fans value, how they engage, and what drives connection across markets and generations.

Of note, this survey is not a census of all F1 fans, casual viewers or general sports audiences. Rather, it reflects the perspectives of deeply invested, opt-in participants – those who actively engage with the sport and its ecosystem. These insights are designed to support stakeholders across the F1 landscape looking to build lasting relevance and resonance with a global, passionate, and fast-changing fanbase. Given the timing of the survey fieldworks, findings also don't reflect the impact of the F1 movie, and its potential to grow engagement and excitement with both new and existing fans.

There have been some significant developments in F1 fandom since our last Survey in October 2021, which are clearly demonstrated across these pages. F1 has managed to continue attracting younger and female fans, while managing to retain its loyal fans, who have followed the sport for over four years. Striking this balance is a significant achievement. It has been realised by maintaining a compelling racing product, while providing personality-led insights and more touchpoints for fans with the sport.



Passion Runs Deep –and Broadens in Meaning.

94%

of all respondents say they expect to be following F1 five years from now, including 97% of Gen Z, 96% of those identifying as new fans (following F1 ≤5 years), and 95% of U.S. respondents.

While legacy fans (**following 6+ years**) who took part anchor their passion in performance and heritage, newer surveyed fans—especially women and Gen Z—are drawn in by personality, strategy, and storytelling.

This duality is not a tension, but a strength: F1's appeal is rooted in both tradition and reinvention.

Content Engagement is Always-On.

61%

of those responding engage with F1 content daily—spanning platforms from YouTube and Twitch to podcasts and social clips.

In the U.S., this “multi-format fandom” is especially pronounced: younger surveyed fans discover F1 via social and streaming, while long-time followers remain loyal to live broadcasts and in-depth editorial.

This underscores an opportunity: content isn’t just a race-day companion—it’s a year-round fandom driver.

Live Experiences Define Emotional Commitment.

87%

of younger U.S. respondents who haven’t yet attended a race plan to—a massive opportunity for conversion.

One in four global surveyed fans have also engaged with non-race events like meetups and cultural activations.

Digital fandom is translating directly into IRL demand—especially in growth markets like the U.S., India, and Brazil.

F1 Sits at the Center of Motorsport.

75%

of respondents say F1 is the sport they follow most closely; 15% follow no other sports at all.

While many surveyed fans also follow football (soccer), American football, or cricket regionally, F1 outranks other sports across all emotional attributes: innovation, glamour, and excitement.

Culture, Identity & Lifestyle Are Expanding the Brand.

58%

of respondents across Gen Z and women say fashion and lifestyle are part of their fandom, and brand collaborations are extending the reach of F1 into new cultural spaces.

Sponsorship Isn't Just Accepted—It's Influential.

76%

of the fans surveyed say sponsorship contributes positively to F1.

One in three respondents say they are more likely to consider a sponsor's product, rising to 43% among Gen Z U.S. fans and 50% in APAC.

Team- and driver-led activations are most effective, particularly among emerging fan segments seeking emotional and cultural alignment.

01

Inside the Minds of F1's Most Engaged Fans

CHAPTER



A New Generation Joins a Global Legacy

The 2025 Survey Reveals F1's Expanding Fan Base

Formula 1 fandom is multifaceted. What was once seen as a predominantly male, European, and legacy-driven sport is now home to a unique and standout mix of global, gender-diverse, and generationally varied fans. The 2025 Global Fan Survey reflects this shift in striking detail—showcasing the sport's expanding reach and appeal across cultures, platforms, and age groups.

Importantly, this study reflects the views of self-identifying, highly engaged F1 fans—respondents who opted in to participate via F1, Motorsport Network, teams, and affiliated media promotion. It captures not a representative sample of all fans, but the pulse of the sport's most attentive and passionate audience.

This chapter highlights the foundational demographic trends shaping today's F1 fanbase—and sets the stage for understanding how this evolution is impacting behavior, motivation, and future engagement.

A Truly Global Audience.

A Worldwide Response

100K+

respondents from

186

countries participated in
the 2025 Global Fan Survey,
making it the most
geographically
comprehensive to date.

49%
Europe

13%
Asia-Pacific

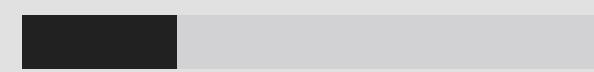
12%
Rest of World

26%
Americas

The U.S. is the #1 most
represented country
in this survey.

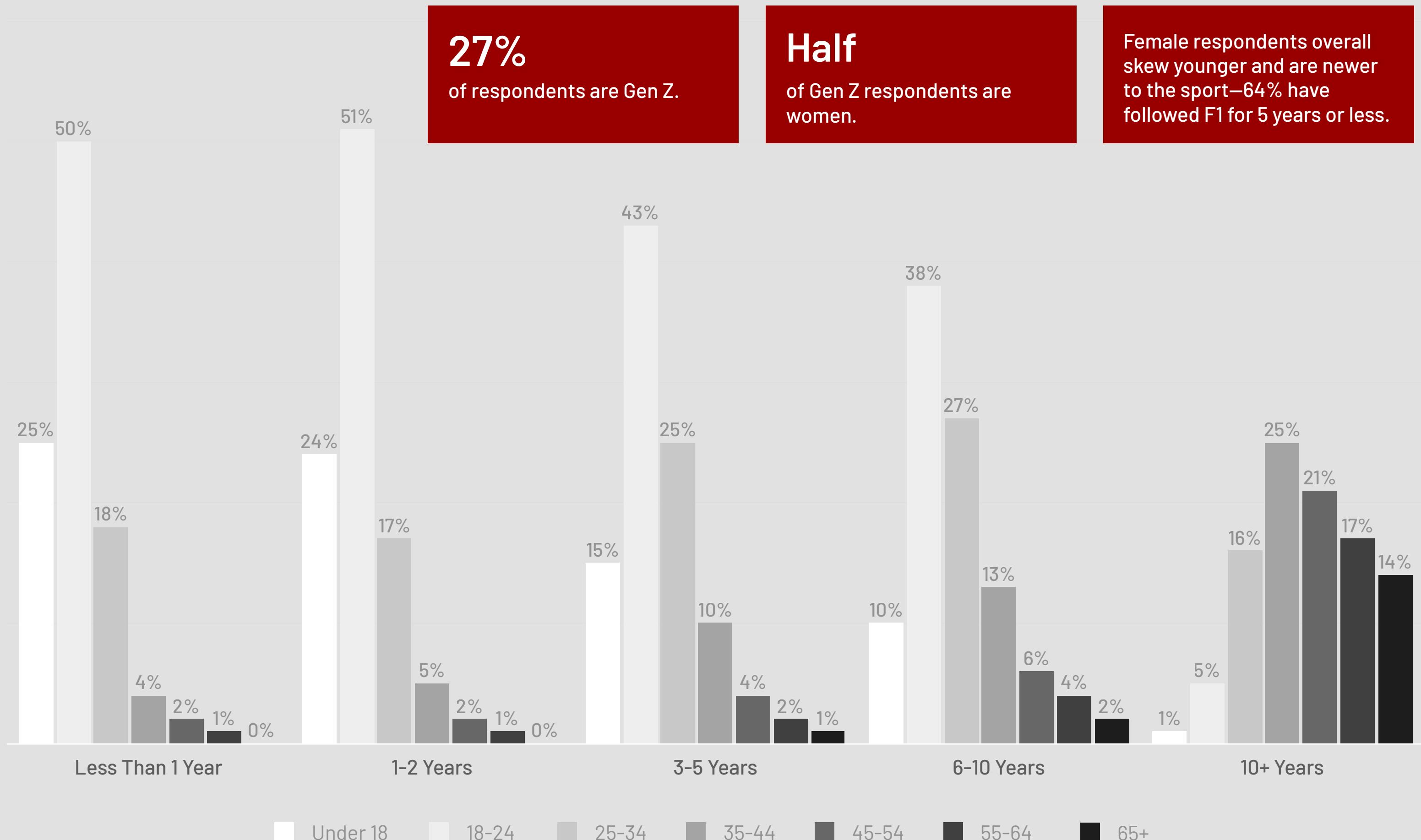
A Cross-Generational Surveyed Fanbase with Youth on the Rise.

Average respondent ages:



Years of Fandom x Age

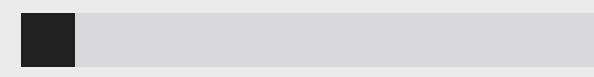
A Generational Gender Shift:



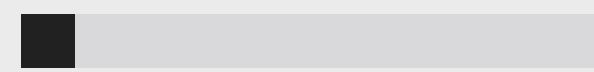
How long have you been a fan of Formula 1?

A Record Share of Female Respondents.

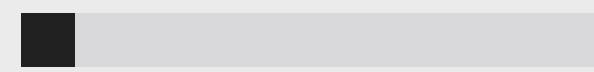
One in four survey respondents are women— an all-time high:



10%
2017



18%
2021

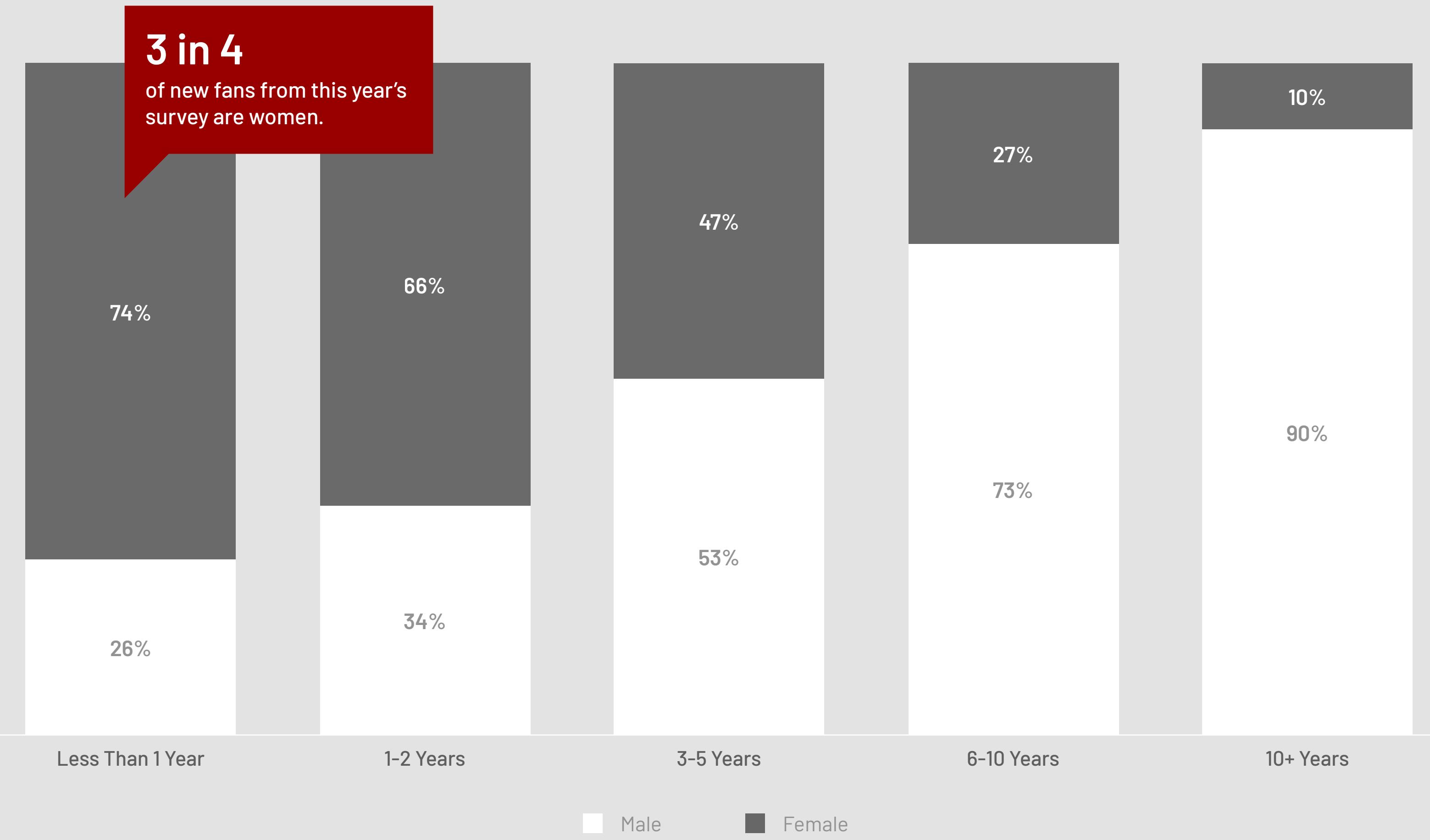


25%
2025

This is reflective of the trend that has seen total F1 fandom reach 42% female.

Years of Fandom x Gender

Globally, women make up 74% of new fans from this year's survey.



F1 Fans Commit for the Long-Term.

27%
Emerging Fans

surveyed that have been following F1 ≤ 5 years

94%

Plan to follow F1
in 5 years

73%

Long-Time Fans

surveyed that have been following F1 6+ years



"The duality of Formula 1 today—a sport that feels both fresh and established—is one of its most powerful assets and reasons why it is setup for the long term."

— President, Autosport Business & F1, Motorsport Network

Emerging vs. Legacy Fan Profiles:

Legacy and emerging surveyed fans coexist within the same ecosystem and are equally intent on their commitment to long term fandom.

Emerging Fans:

Newer surveyed fans are more likely to be female, under 35, and from emerging markets like the U.S., India, and Southeast Asia.

Legacy Fans:

Legacy fans skew older, male, and are more concentrated in Europe.

How New F1 Fans are Finding the Sport.

Fan entry points are shifting by generation, gender, and geography.

The path into Formula 1 fandom is no longer one-size-fits-all. The 2025 survey reveals that how fans discover the sport varies widely by demographic—and that modern channels are gaining ground fast.

Friends & Family Remain the Gateway—The most common entry point is personal connection.

#1

39%

of all fans surveyed say they were introduced to F1 by friends or family.

46%

among women.

45%

among 18-44.

Traditional Media Still Matters—TV and general media coverage is the #2 discovery method overall.

#2

24%

of all fans surveyed say they were introduced to F1 by TV/Media Coverage.

33%

among older fans

29%

among men

30%

among long-time followers.

Modern Fandom On-Ramps – Streaming, Social, and Driver Storylines.

Emerging fanbase increasingly drawn in via:

Social Media

12%

Driver Interest

12%

'Drive to Survive'

10%

Among fans newer (following F1 ≤5 years), 16% say 'Drive to Survive' was their entry point.

Strategic Implications.

Formula 1's ability to grow a younger, more globally and gender-diverse fanbase—without sacrificing loyalty among longtime fans—signals a critical moment of opportunity. This dual dynamic, where fresh discovery intersects with deep tradition, is one of the sport's most powerful growth assets. Understanding the distinctions between new and legacy fans—and what brings each to the sport—will shape the future of engagement, media strategy, and cultural positioning.

F1's global fandom is diversifying – and accelerating.

With responses from 186 countries and the highest-ever share of female fans responding (25%), the 2025 survey reveals a fanbase that spans age, gender, and geography more than ever before. Regional patterns, particularly in the U.S., also point to rising momentum in new markets. This tallies with official Formula 1 data that shows 42% of their total fanbase is female, and 43% is under the age of 35.

New fans are reshaping how fandom is formed.

Female fans and Gen Z are most likely to have discovered F1 in the last 5 years—and most commonly through friends, streaming, or social media. These discovery channels influence the type of content they engage with and the emotional connections they form.

Loyalty runs deep – regardless of tenure.

94% of respondents—new and legacy alike—plan to still follow F1 in five years, signaling that new fans are not only showing up but staying in. This long-term commitment challenges the notion that newer audiences are less engaged.

Discovery pathways offer early indicators of fan type.

Fans who enter through personal connection, traditional media, or modern platforms like streaming and social media often go on to engage in different ways—making discovery method a powerful early signal of future preferences and engagement style.

CHAPTER

02

Emotional Motivators & Passions



CHAPTER

02

Fans Are Falling Hard for F1.

Today's F1 fans aren't just tuning in—they're emotionally invested, deeply curious, and increasingly committed for the long haul. From the thrill of racing to emotional ties with drivers—passion fuels this fandom. And for the newest segments, it's more than a pastime, it's a cultural identity.

This chapter explores how passion is a motivator for high-growth segments, how fan behaviors differ across categories and characterizations, and what it signals for the future of fandom and engagement.

Fans Are Passionate—and Here to Stay.

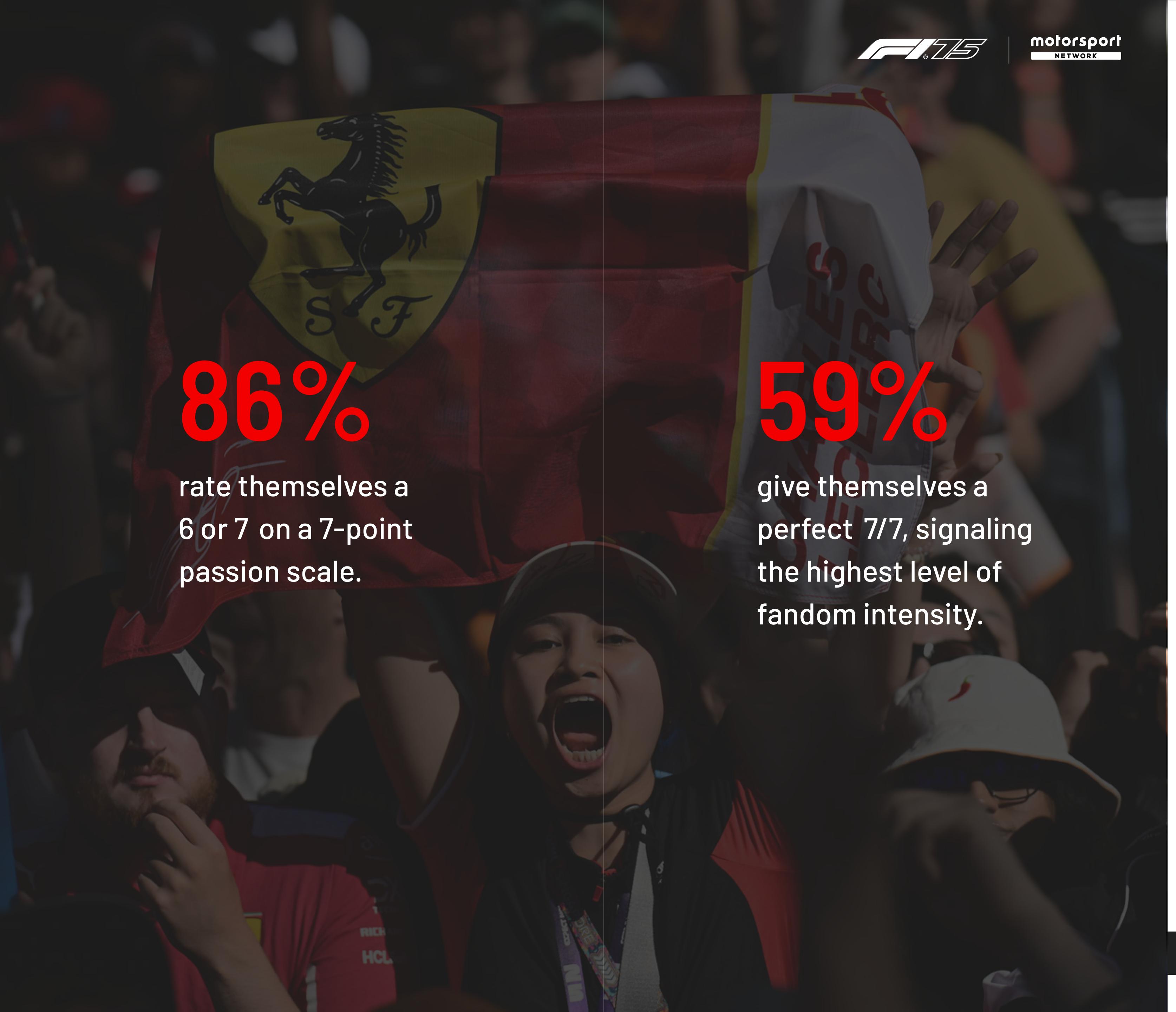
Survey respondents aren't casual—they're committed. Across every age, gender, and geography—participating F1 fans rate themselves as intensely passionate and highly invested.

86%

rate themselves a 6 or 7 on a 7-point passion scale.

59%

give themselves a perfect 7/7, signaling the highest level of fandom intensity.



This isn't just legacy loyalty. Participating emerging fans are especially bullish about their future with the sport:

96%

of newer fans (≤ 5 years) and female fans expect to stay engaged long term.

97%

of Gen Z fans say the same.

95%

of U.S. fans also project sustained interest.

Among long-time surveyed followers (6+ years) and fans aged 45+, engagement remains high, though slightly lower than newer cohorts:

93%

of long-time fans and...

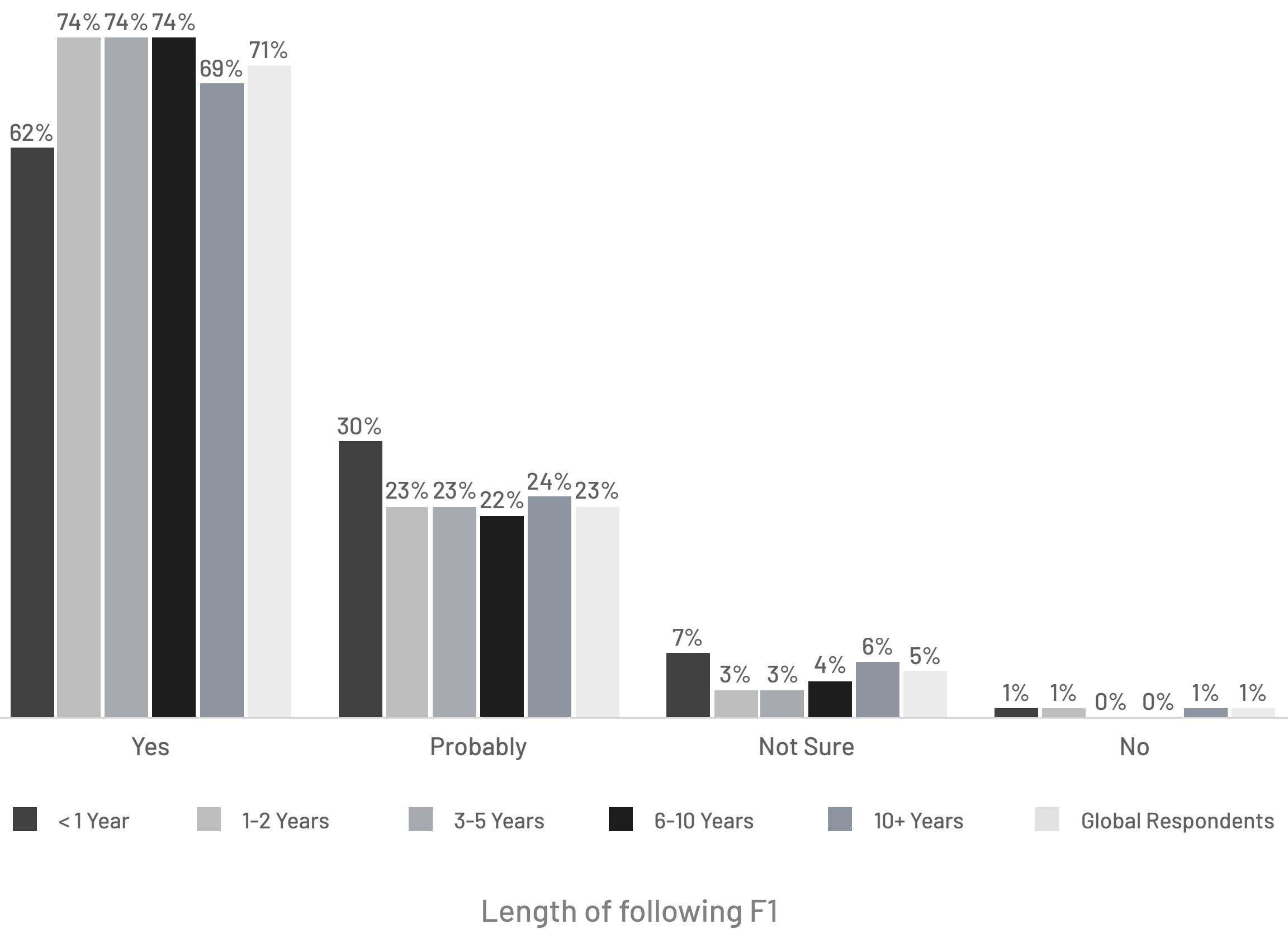
66%

of 45+ fans say they'll "absolutely" still be following F1 in five years.



Intent to Follow F1 in 5 Years

Whether new or long-time fans, most global respondents show strong intent to stay engaged with F1, reflecting a consistent level of commitment.



Do you see yourself following Formula 1 in 5 years?

Among global markets:

97%

Brazil

95%

United States

lead in long-term engagement intent.

U.S. surveyed fans, in particular, mirror many of the broader trends seen among newer and younger audiences—driven by emotional connection, storytelling, and cultural relevance.

Strategic Insight:

These numbers affirm that recent growth—especially among women, Gen Z, and U.S. fans—isn't fleeting. It's foundational to F1's long-term audience development.

United by the Thrill of the Race.

While motivations for following F1 vary by age, gender, and tenure, the thrill of the race remains the universal driver of passion.

Whether they're drawn in by personality or legacy, surveyed fans share a common emotional spark: the unpredictability, intensity, and spectacle of the race itself.

90%

of respondents say they are emotionally invested in race outcomes.

"The thrill of the races and the speed"

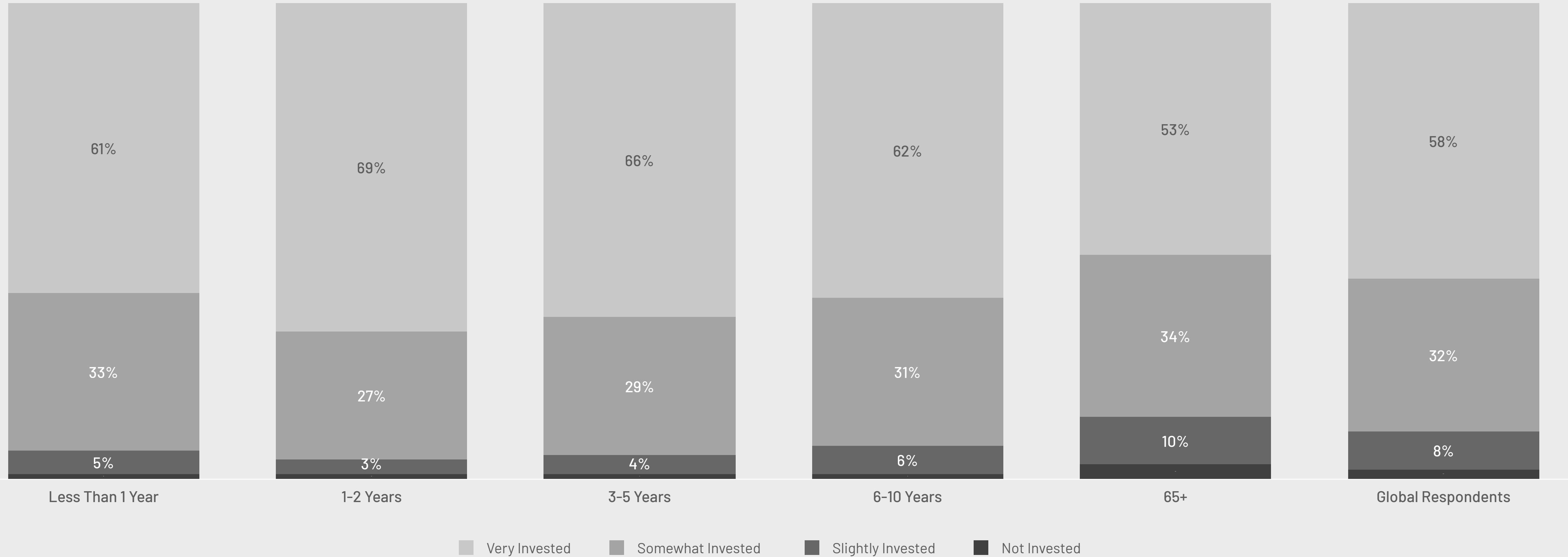
is the #1 motivator across nearly all segments.

Additional motivators

– such as driver personalities, team identity, innovation, or strategy—vary more widely by cohort.

Emotional Investment

Emotional investment peaks among global respondents who have followed F1 for 1-2 years, then remains high but slightly tapers among longtime followers.



How emotionally invested are you in the outcome of Formula 1 races?

Top motivators for following F1, among survey respondents:

	Legacy Fans: Older (Age 45+) / male / longer fans (follow 6+ years)	Women:	Gen Z:	Newer fans: (following 5 years or less)
01	I've been a fan since childhood	Love the thrill of the races and the speed	Love the thrill of the races and the speed	Love the thrill of the races and the speed
02	Love the thrill of the races and the speed	I'm a fan of the drivers	I'm a fan of the drivers	I'm a fan of the drivers
03	Enjoy the innovation and technology	Enjoy the strategy behind the sport	I'm a fan of the teams	Enjoy the strategy behind the sport

Female Respondents:

49%

of female respondents say drivers are a key reason they follow F1—2x the rate of male respondents.

Gen Z Respondents:

41%

cite drivers as a primary draw.

25%

say they follow for a specific team—higher than any other age group.

Newer and Younger Respondents:

These surveyed fans are more likely to be influenced by storytelling, identity, and strategy.

U.S. Respondents:

Younger and newer surveyed fans in the U.S. are more likely than global averages to cite driver personalities and narrative drama as primary draws.

Older Respondents:

In contrast, older fans, particularly those aged 45+ or following for more than six years, are more likely to cite lifelong tradition (fan since childhood), and innovation as their passion drivers. While 88% of fans aged 45+ rate themselves 6 or 7 on the passion scale, their fandom tends to be anchored in performance, consistency, and legacy—not individual personalities or teams.

These patterns suggest a generational and attitudinal divide: newer fans are more likely to form identity-based connections with the people and brands of F1, while legacy fans remain rooted in the sport itself—valuing tradition, engineering, and long-time dedication.

F1's Core Identity Still Resonates.

Across all segments—regardless of age, gender, geography, or tenure—fans associate Formula 1 with excellence in performance and innovation.

71%

of surveyed fans say high performance and precision are defining attributes of the sport.

62%

cite innovation and technology as central to F1's identity.

These remain the top associations—underscoring that technical mastery is still foundational, even as lifestyle-led elements like fashion, status, and celebrity gain traction among younger, newer, and broader fan cohorts.

The takeaway is not one of replacement—but of layering. F1's legacy of excellence and innovation continues to lead, while cultural and personal dimensions grow more influential for the next wave of fans.



Teams & Drivers.

Emotional anchors for newer fans.

F1's newest audiences are connecting emotionally with the people who make up the grid. Among newer, younger, and more diverse surveyed fans—particularly in emerging markets—drivers and teams aren't just racing heroes; they're cultural figures.

48%

of all surveyed fans report being inspired by an F1 driver or team outside the context of racing.

This jumps to:

59%

of female fans,

66%

of Gen Z, and

60%

of newer fans (≤ 5 years).

In the U.S. this effect is especially strong:

Fans are drawn to drivers' personalities, social media presence, and off-track storytelling—making F1 stars feel more like global icons than traditional athletes.

75% 69% 55%

India

Brazil

Japan

report the highest rates of off-track inspiration.

Despite this emotional pull, fandom remains relatively non-tribal:

61%

of respondents follow multiple teams or identify as neutral—a finding consistent across past surveys (2021: 72%, 2017: 55%).

In newer markets like the U.S.:

Team loyalty is still forming. Driver affinity is currently the stronger emotional anchor:

40%

of U.S. fans identify primarily as fans of specific drivers

21%

of fans say the same about teams

These trends reinforce a broader shift: for modern fans—especially outside of Europe—personality-led narratives and cultural relevance are key drivers of connection, engagement, and identity. At the same time, fandom continues to be less tribal and more inclusive than other sport, an element that strongly appeals to newer fans.

Drivers Aren't Just Winning Races; They're Building Emotional Equity.

Younger surveyed fans show strong emotional pull toward local drivers—

78%

say a driver from their country would increase their interest.

Drivers are the single strongest emotional connector for F1's fastest-growing audiences. The faces of the sport—their personalities, rivalries, and cultural relevance—spark passion.

Fandom is increasingly personality-led, especially among newer, younger, and female fans—

2 in 3

Gen Z respondents feel personally inspired by Formula 1 drivers and/or teams.

Emotional connection doesn't always equal tribal loyalty—

6 in 10

fans follow multiple teams or none.

Strategic Implications.

Fandom is evolving—and more personal.

Drivers are the gateway.

Legacy values still matter.

Emotional loyalty ≠ tribal loyalty.

Engagement is durable and cross-demographic.

Growth audiences are emotionally connected through drivers, storytelling, and cultural identity—not just racing tradition. Their entry points and emotional anchors differ markedly from long-time fans, signaling a need to tailor content, access, and engagement by cohort.

For newer, younger, and especially U.S.-based fans, individual drivers are the primary hook—often outweighing team or technical allegiance. Driver-first strategies will remain essential for global growth and new fan onboarding.

While new fans are drawn in by personality and drama, performance, innovation, and tradition still dominate overall perceptions of F1. There is no trade-off: modern fandom is layered, not fragmented.

Despite strong emotional connection, most fans don't follow just one team. 61% remain neutral or multi-team followers, opening the door for broader engagement models that emphasize sport-wide narratives over siloed fandom.

With 97% of Gen Z, 96% of newer fans, and 95% of U.S. fans expecting to follow F1 five years from now, stakeholders can confidently invest in long-term storytelling, personality-led platforms, and fan touchpoints that deepen connection over time.

F1 Spotlight 

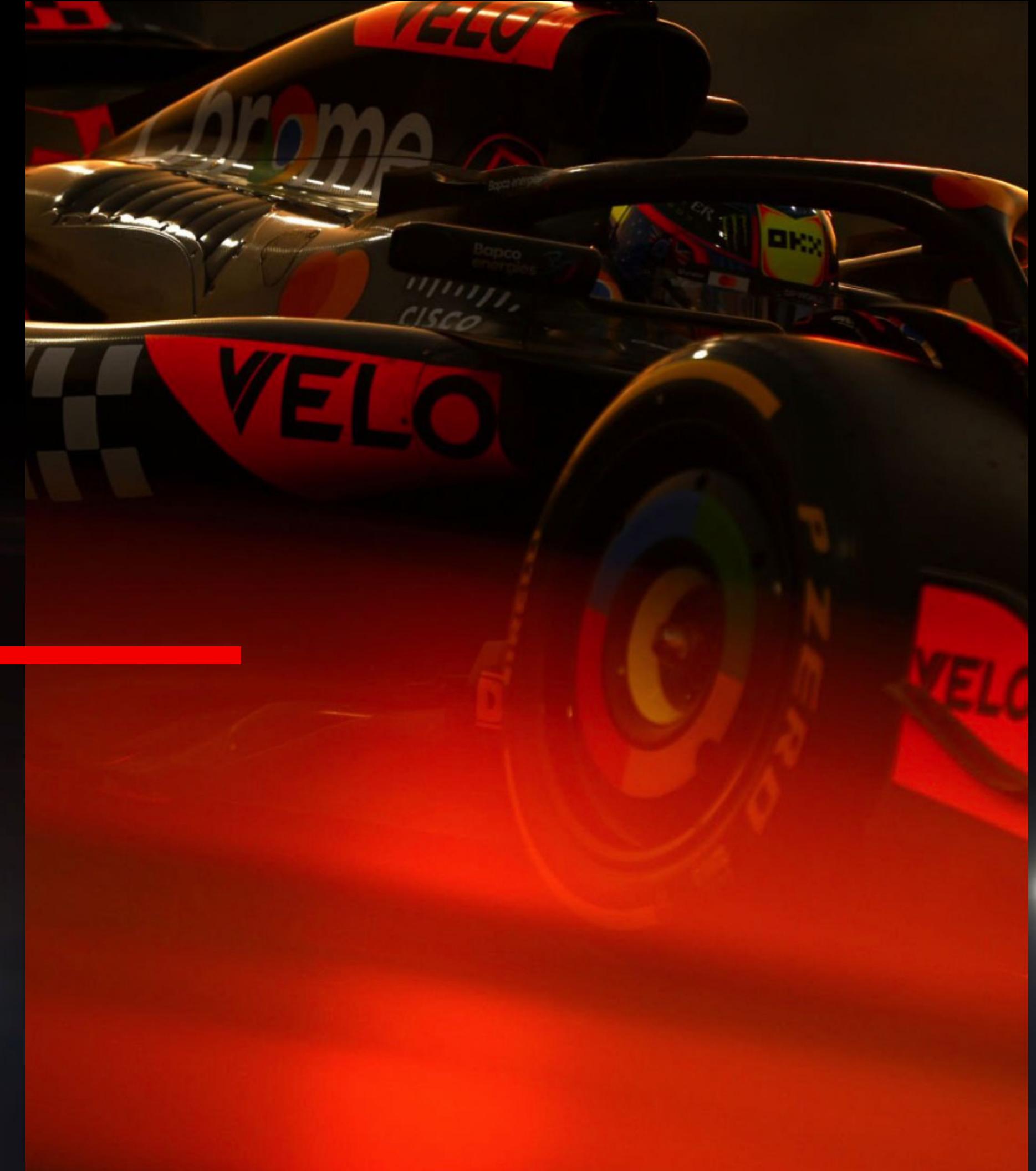
Enabling Emotional Fandom.

From the outset, Liberty Media positioned drivers as the stars of the show, calculating that younger and more diverse fans would connect through personality. That strategy— from ‘Drive to Survive’ and beyond—has worked: nearly half of female and Gen Z fans cite drivers as their main reason for following the sport.

F1 has created more touchpoints for fans with the sport outside of race weekends. It has managed through content on its owned and operated channels such as F1.com and F1TV to provide data and information to feed the enduring curiosity and passion of the legacy fans.

CHAPTER
03

Content Engagement



CHAPTER
03

From Race Weekend to Every Day: F1's Fandom in Always On.

What once spiked on Sundays is now constant—fans are connected across platforms, formats, and touchpoints, creating new momentum and opportunities for engagement 365 days a year.

Formula 1 content consumption has become an always-on behavior. While live races still anchor the calendar, they're now just one part of a much larger content journey. Today's fans engage with the sport every day—watching, reading, sharing, and shopping across an expanding mix of media. From highlight clips and podcasts to social commentary and driver content, fandom now unfolds across platforms and formats, continuously.

Our respondents' data shows that these habits differ sharply by age, geography, and tenure. Gen Z fans in the U.S. often come to the sport via creators and social clips. In Europe, long-time fans remain more anchored to broadcast coverage and in-depth analysis. Across all markets, women and younger fans are driving the rise of lifestyle-led fandom—connecting with F1 through personality, identity, and culture.

These fans often stay connected through platforms like YouTube, Twitch, Instagram, and online forums, with behaviors shaped by age, region, and how long they've followed the sport. The result is a fandom that is more segmented—but also more engaged—than ever before.

Fandom Is Daily and Cross-Platform.

Formula 1 fandom is no longer episodic—it's a 365-day engagement cycle. Fans are checking in daily across multiple media formats.

61%

of surveyed fans engage with F1 content daily.

34%

engaged a few times per week.

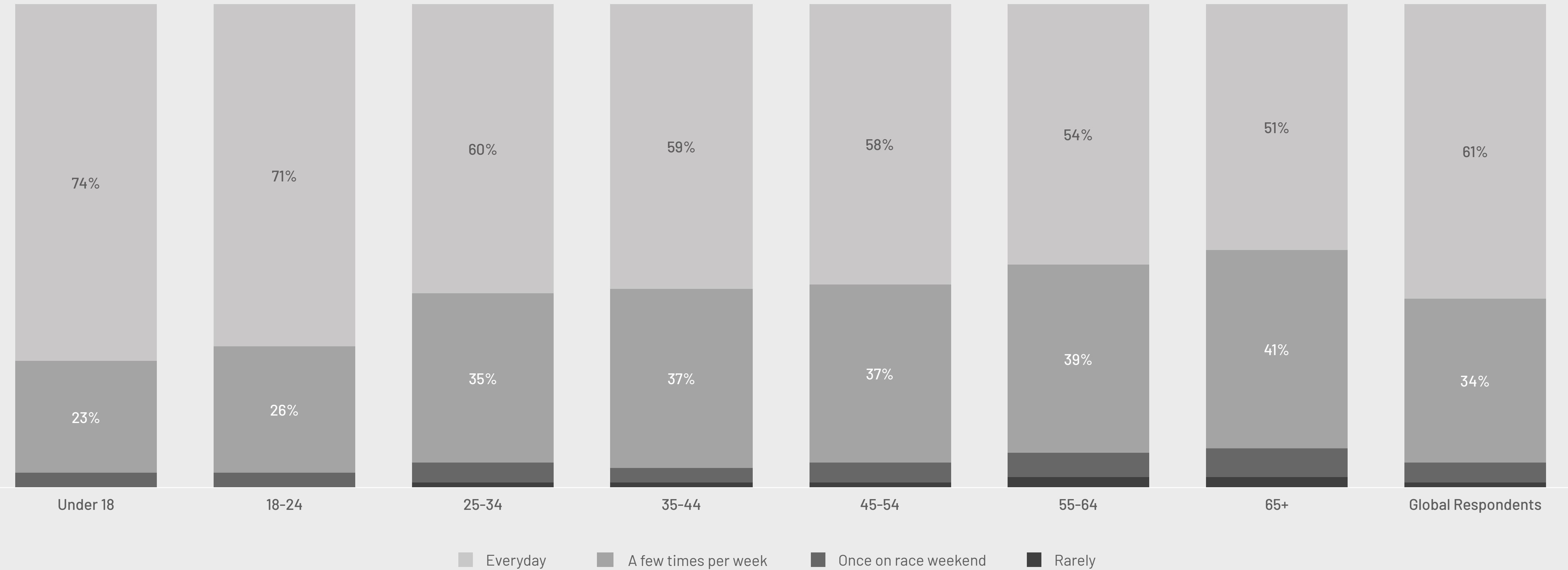
70%

of U.S. fans aged 18-24 engage with content daily.



News/Social Engagement

Global respondents engage with F1 content daily across age groups, with younger fans showing the highest levels of day-to-day interaction.



How often do you keep up with Formula 1 news, social media, and other content outside of race weekends?

The Live Race Endures.

Live race viewership remains a defining ritual of fandom among those surveyed:

86%

of respondents watch 16+ races per season.

73%

watch 20 or more, – proving race day remains a core habit.

Levels have held steady since
2005

Live race viewership by demographics:

Strongest engagement among male respondents:

86%

Those aged 25–44:

87%

Europe leads in frequency:

87%

watch 16+ races.

Strongest viewership:

92%

Netherlands

90%

Brazil

89%

Italy

In the U.S.:

73%

of fans watch 20+ races per season – one of the most consistently engaged markets globally.

Younger Global Respondents Closely Link F1 Fandom with Social Media Engagement.

Social is now central to fandom:

64%

of all surveyed fans say social media is an important channel for accessing F1 content.

Up from:

40%

2021

31%

2017

28%

2015

This importance is highest among:

92%

Women

94%

Gen Z

U.S. fans:

93%

Newer fans (≤ 5 years)

75%

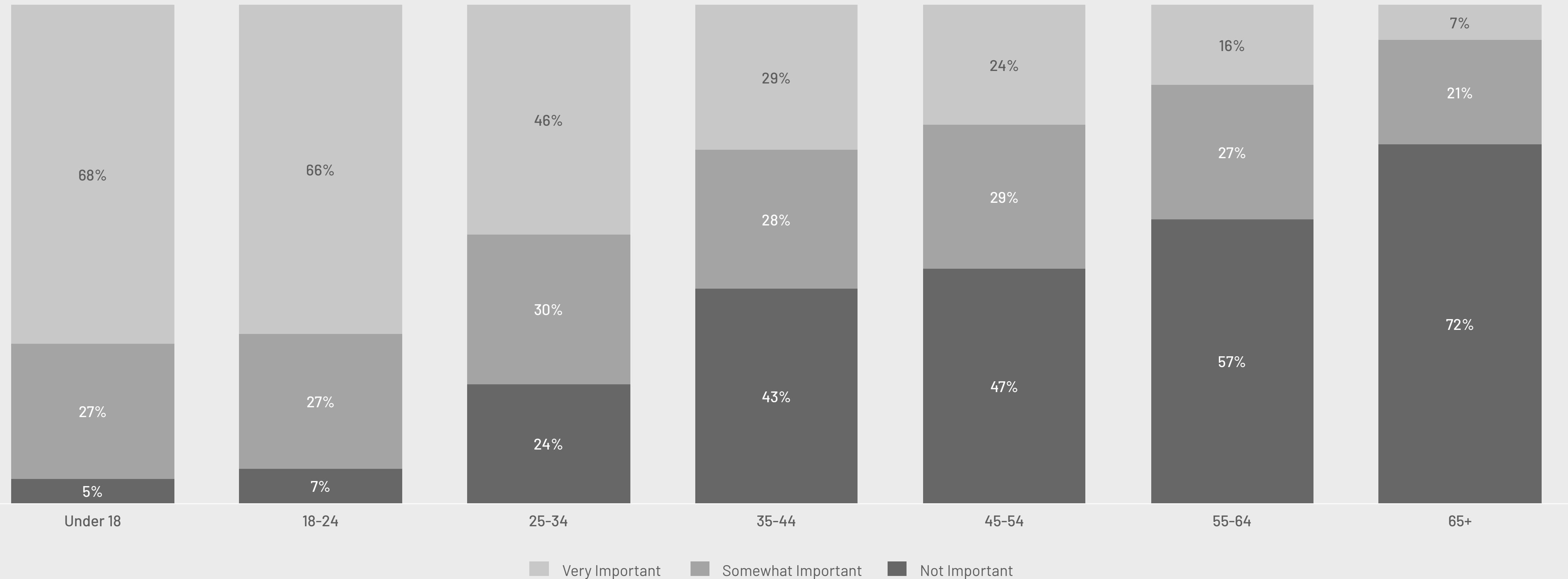
surpassing Europe and trailing only APAC.

By contrast, only 42% of fans aged 45+ and 54% of long-time followers view social as a core access point.



Importance of Social Media

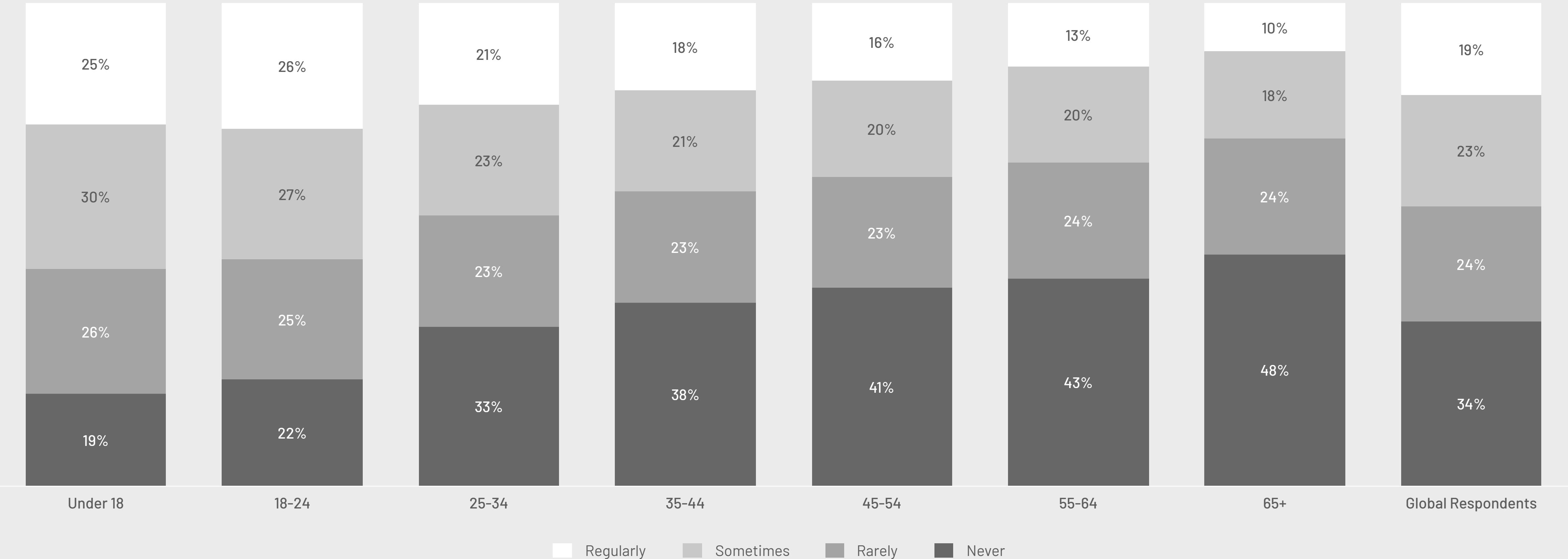
Global respondents are split by age on social media's role in fandom, with younger fans calling it essential and older fans seeing it as unimportant.



How important is social media (e.g. X, Instagram, TikTok, etc.) in your connection to Formula 1?

Online Discussions

Global respondents tend to stay on the sidelines of online discussions but younger fans are more likely to dive into the conversation.



How often do you discuss Formula 1 with online communities?

Cross-Platform Consumption – YouTube, Twitch and the second screen era.

Modern fans toggle between formats based on their needs and backgrounds. Emerging fans favor social and video-first touchpoints that foster discovery, connection and community. Longtime fans dig deeper into strategy and analysis.

These platforms are not just second screens—they are on-ramps and entry points to fandom.

45%

of respondents regularly consume F1 content on YouTube or Twitch.

This rises to:

60%

among Gen Z, and

55%

among newer fans.

Regional Standouts:

Highest platform usage:

65%

India

60%

Brazil

Lowest platform usage:

36%

France

36%

Netherlands

U.S. fans:

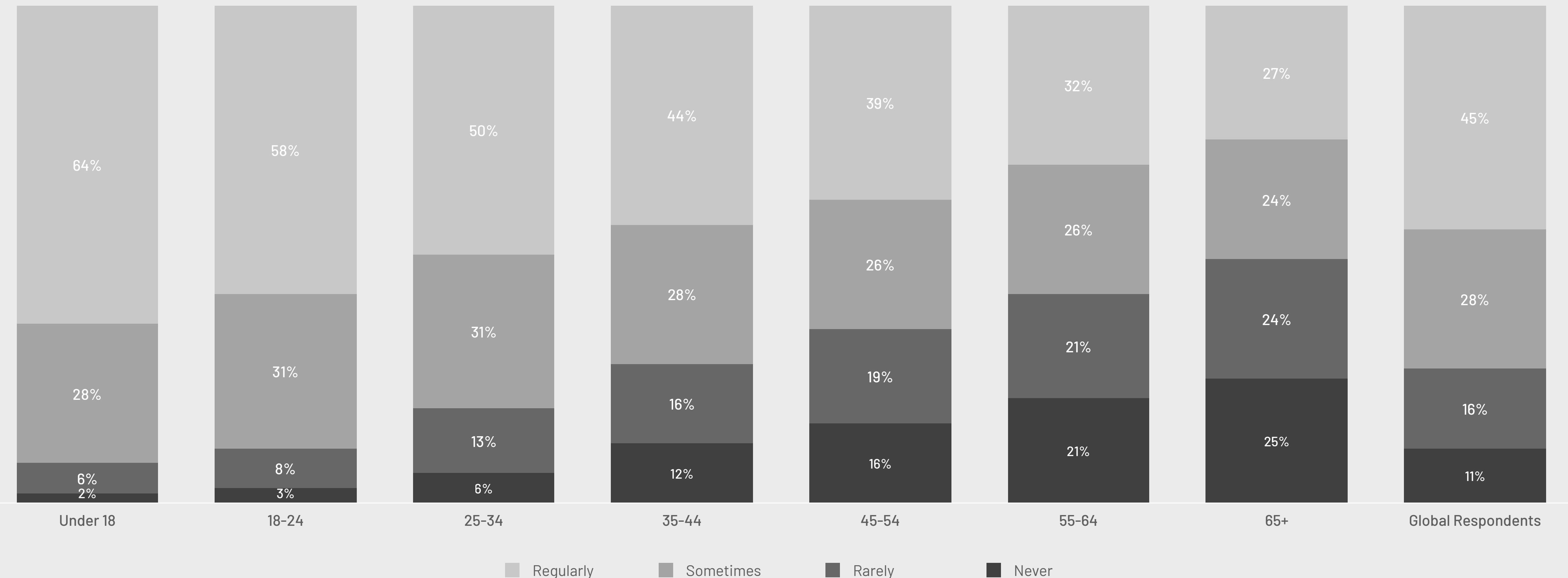
56%

of U.S. Gen Z fans regularly consume F1 via YouTube or Twitch.

Content Format:	Popular With:	Purpose:
Social Media	Gen Z, women, new fans	Discovery, highlights, personality
Blogs/Articles	Age 45+, legacy fans	Context, commentary, analysis
YouTube & Twitch	Gen Z, new fan	Video immersion, watch-along, sim racing
Podcasts	Brazil, U.S., women	Deeper engagement and analysis
Online Forums	Gen Z, women	Community, peer-to-peer discussion

YouTube & Twitch Usage

Global respondents often turn to YouTube and Twitch for F1 content, with usage most frequent among those aged 18-34.



How often do you consume content about Formula 1 on platforms like YouTube or Twitch?

Content Behavior Outside Race Weekends –

73%

supplement their F1 consumption by reading articles or blogs.

73%

access F1 news via social media.

53%

watch F1 video content between races.

Social news/video usage is especially high among:

	social news	video usage
Women:	90%	68%
Gen Z:	89%	74%

In contrast, blog and article readership rises with age and tenure:

80% **79%**

among fans 35+ among fans following for 6+ years.

U.S. fans show multi-format engagement patterns:

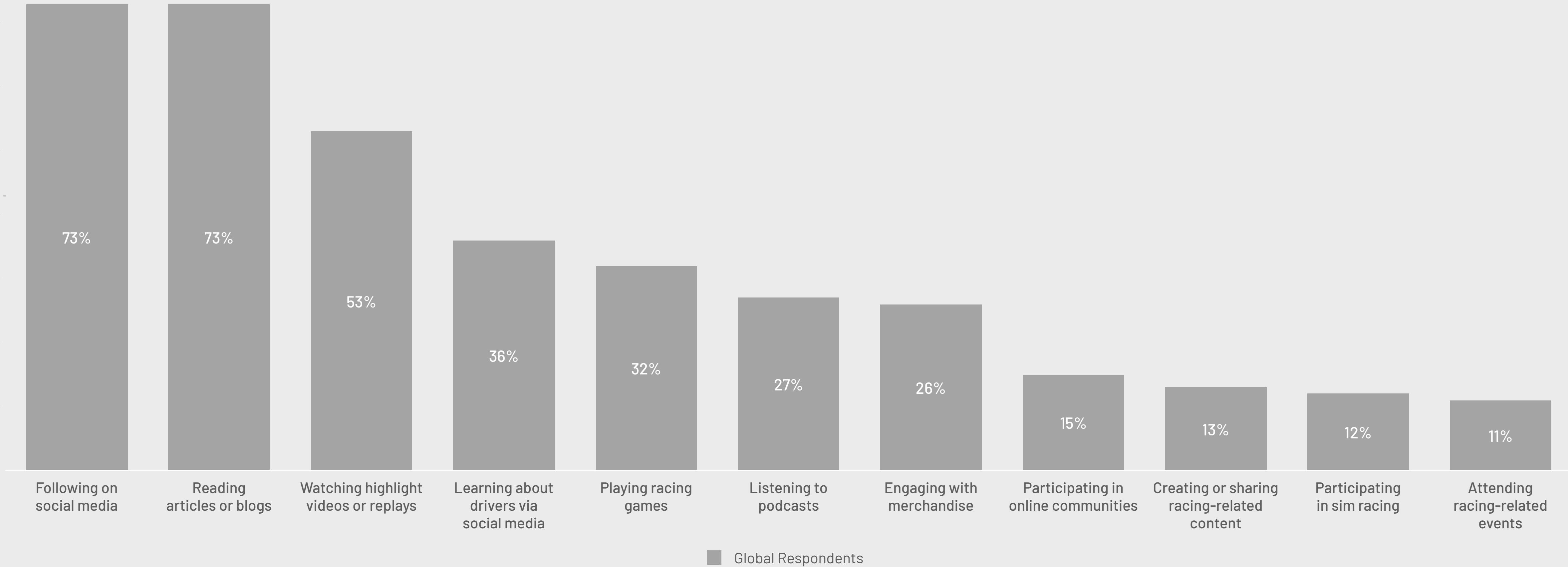
75%

use social media for F1 content and high blog/article readership consistent with global norms. This suggests a dual behavior—short-form content for discovery and community, editorial formats for deeper context.



Engagement Type

Global respondents rely on media content to stay plugged into F1, primarily turning to both social and news content to stay informed.



Which of the following activities do you engage in to connect with racing content outside of watching live events?

Audio and Community —

27%

of surveyed fans listen to F1 podcasts.

Engagement is strong in:

37%

Brazil

31%

U.S.

Compared to:

26%

Europe

21%

Asia-Pacific

Podcast consumption is stronger among:

29%

women

33%

aged 25-44

15%

use online forums.

With uptake rising to:

25%

among women and younger fans.

A growing number of fans—especially younger ones—are just consuming content, they’re participating in its creation.

53%

of fans regularly watch and reshare highlight videos or social clips—platform behaviors that often blur the line between consumption and contribution.

Gaming and Sim Racing –

32%

of surveyed fans regularly play racing video games

with:

12%

participating in sim racing

Gaming is most popular among:

48%

Gen Z fans

35%

newer followers

Sim racing is significantly more male-skewed:

15%

men

vs.:

4%

women



Content to Commerce –

While content engagement isn't explicitly linked to purchasing behavior in the data, the demographics that are most active across digital platforms— younger fans, women, and newer followers—are also those most likely to buy F1 merchandise.

26%

of global surveyed fans report purchasing team or driver merchandise.

This rises to:

39%

Women

38%

Gen Z

36%

Newer fans

Segments that also over-index on social media usage, YouTube/Twitch engagement, and personality-led content.

Two of the strongest merch markets globally:

37%

U.S.

38%

Japan

While causality isn't confirmed, the correlation points toward a broader trend: as fans engage more deeply with the sport through diversified content—especially via driver narratives and social content—they're more inclined to express that fandom beyond the screen, and transact directly from those engagements.

Strategic Implications.

F1's fandom is no longer episodic.

Shift to always-on engagement.

Content behaviors aren't monolithic.

It is continuous, cross-platform, and culturally layered—reaching fans through a daily rhythm of content, commentary, and connection. Fans are checking in daily, forming habits and touchpoints that stretch far beyond the circuit.

The shift to always-on engagement signals an opportunity to rethink content not only as a supplement to the race, but as a primary driver of fandom itself. Content is now an onboarding tool, a retention engine, and a cultural amplifier. For many fans, it's the reason they come—and increasingly, the reason they stay.

Content behaviors vary sharply by age, region, and tenure:

- Newer and younger surveyed fans gravitate toward fast-moving, personality-led formats like short-form video and social discovery.
- Legacy fans value depth, data, and editorial insight.
- Women and Gen Z fans lead consumption across emerging channels—from social to podcasts to commerce.
- **U.S. fans stand out for their multi-format behavior:** 73% watch 20+ races, 75% use social for F1, and 37% purchase merch —marking it as a critical growth and experimentation market.

Strategic Implications.

Engagement strategies must adapt.

Successful engagement strategies must adapt across platforms and audience types—without losing the connective thread of the sport. Content should play multiple roles:

- An amplifier for new fans.
- A knowledge hub for legacy fans.
- A bridge to commerce, helping fans express their identity through merch and community.

Platforms like YouTube, Twitch, and social media are no longer second screens.

They're primary discovery engines, especially among fans under 30. This underscores the need for content that travels natively across digital formats.

The enduring strength of live race viewership.

Countries like Brazil, Italy, and the Netherlands—reminds us that the core product remains potent. Anchoring engagement in race-day rituals while expanding the ecosystem between events is where long-term loyalty will be won.

Bottom line.

Formula 1 has become a global content brand—where drivers are stars, fans are creators, and every day is part of the sport somewhere online.

F1 Spotlight 

A Content Ecosystem in Motion.

While the data highlights evolving fan behavior, it also underscores how Formula 1 has strategically adapted its media footprint to meet fans where they are—serving a global audience now estimated at over 860 million.

With just 10 teams, 20 drivers, and a 24-race calendar, F1 operates with a limited set of live moments. Yet F1 has successfully built and sustained high levels of engagement between races by expanding its content ecosystem—across platforms, regions, and fan types.

Examples Include:

F1TV expanding access to live and on-demand coverage in key growth markets, offering both hardcore data insights and accessible narratives.

F1 Kids Broadcasts launched in 2024, reimagining live race commentary and visuals for a younger generation, combining education, humor, and interactive overlays.

Race highlight packages on YouTube

becoming high-velocity, on-ramp content for new and casual fans—particularly in younger demographics.

Sim racing and esports initiatives like the F1 Esports Series, which create entry points for digitally native fans and blur the line between participation and spectating.

Creator and influencer partnerships

especially in markets like the U.S., where TikTok and YouTube creators are helping translate F1 culture for broader audiences.

'Drive to Survive' (Netflix) continuing to serve as a gateway for new audiences—blending sport and storytelling to create fandom outside traditional race coverage.

Official F1 podcasts and team-specific audio shows which deepen engagement among fans looking for insight, strategy, and storytelling beyond the grid.

Team- and driver-led social content such as TikToks, Instagram reels, and behind-the-scenes videos, driving emotional proximity and brand loyalty—especially among women and Gen Z.

The F1 movie, by dramatizing the sport's intensity and heritage, expands F1's cultural footprint and attracts new audiences through cinematic storytelling and mainstream entertainment channels.

These moves illustrate how F1 has evolved from a race-first organization into a modern media and entertainment brand—where engagement is always-on, content is platform-native, and personality is part of the product.

CHAPTER

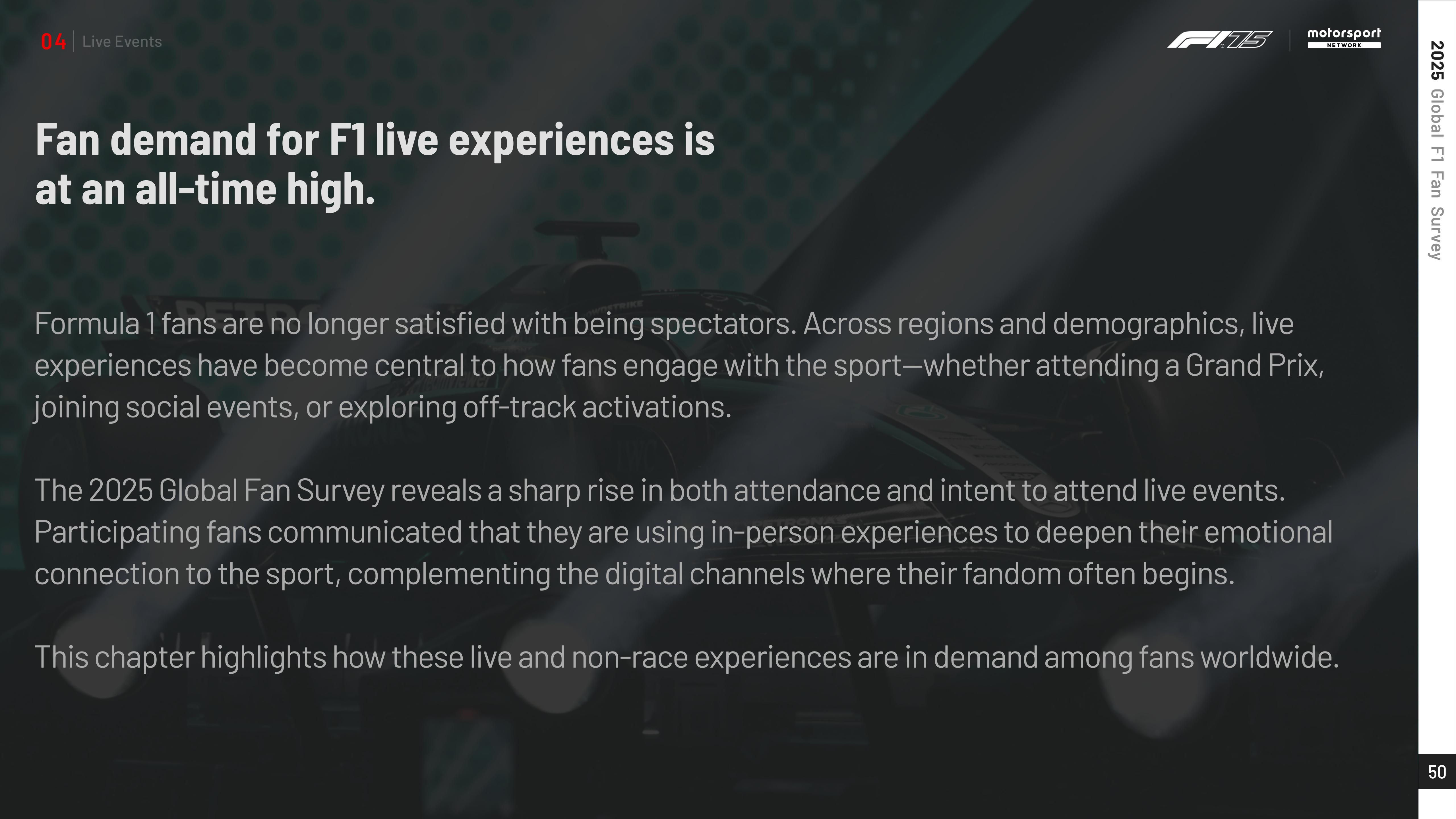
04 Live Events



CHAPTER

04

Fan demand for F1 live experiences is at an all-time high.



Formula 1 fans are no longer satisfied with being spectators. Across regions and demographics, live experiences have become central to how fans engage with the sport—whether attending a Grand Prix, joining social events, or exploring off-track activations.

The 2025 Global Fan Survey reveals a sharp rise in both attendance and intent to attend live events. Participating fans communicated that they are using in-person experiences to deepen their emotional connection to the sport, complementing the digital channels where their fandom often begins.

This chapter highlights how these live and non-race experiences are in demand among fans worldwide.

Nearly Half of Surveyed Fans Have Attended a Race—A Striking Marker of Engagement

Nearly 1 in 2 global respondents (48%) say they've attended an F1 race in person—a figure that far exceeds general market estimates. This highlights the deeply engaged nature of our surveyed fanbase: active participants who follow the sport not just from afar, but through real-world experiences that reflect high levels of interest, access, and commitment.

Global attendance at an all-time high:

75%

of surveyed emerging fans (≤ 5 years) say they plan to attend a race—demonstrating how live events solidify fandom.

Strongest attendance:

56% 49% 47%

Brazil Mexico Netherlands

Local heroes and home races translate to real-world turnout.

56% 49%

India Japan

Show remarkable intent rates among fans who haven't yet attended—highlighting where F1 can grow through localized engagement.

U.S. fans are catching up fast:

41%

of respondents reported having already attended a Grand Prix,

73%

of U.S. respondents plan to attend a U.S. race in the future.

Among U.S. Gen Z fans:

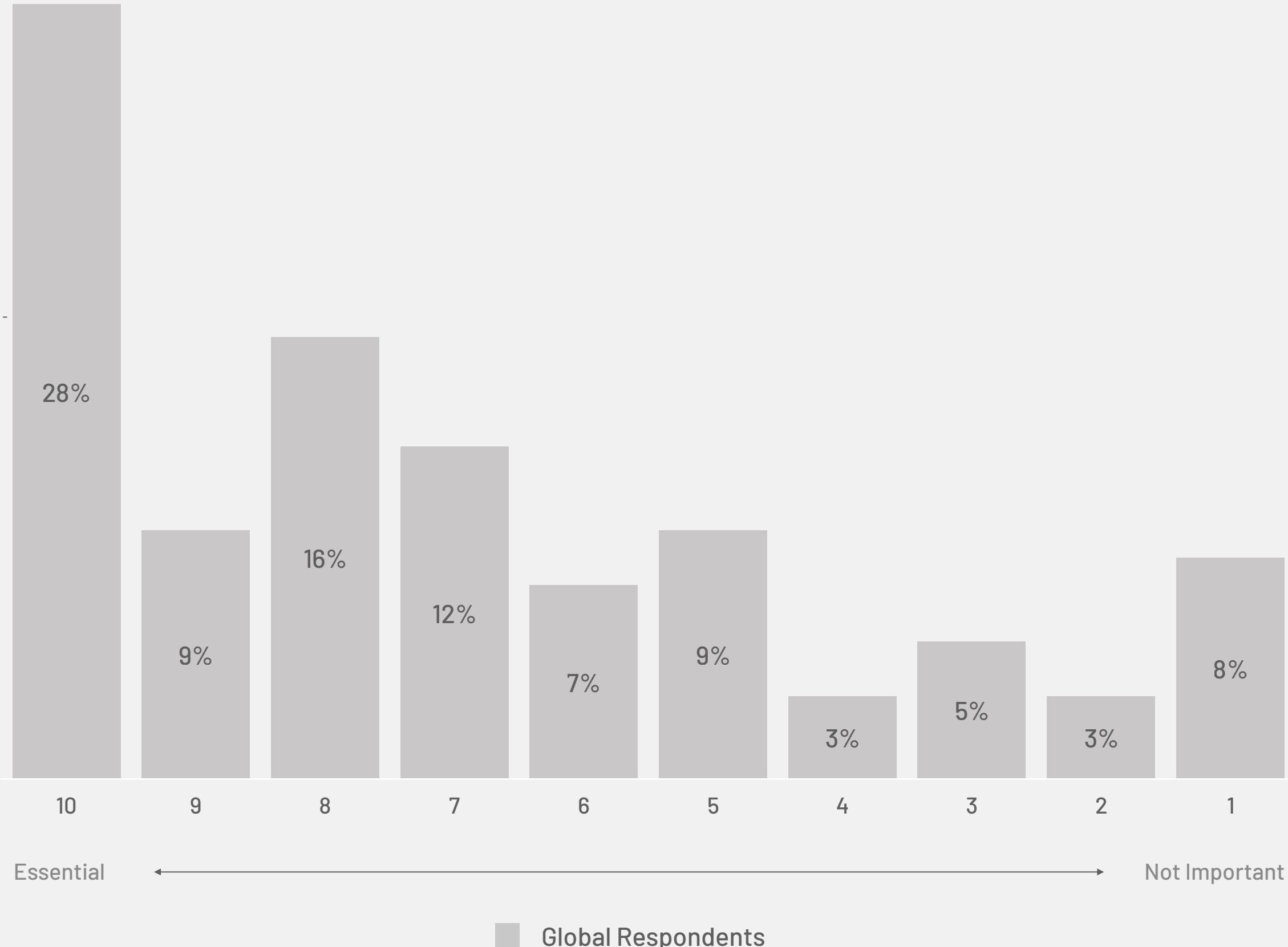
13% 87%

have attended—say they intend to,

pointing to strong near-term growth potential in this demographic.

Importance of Live Event

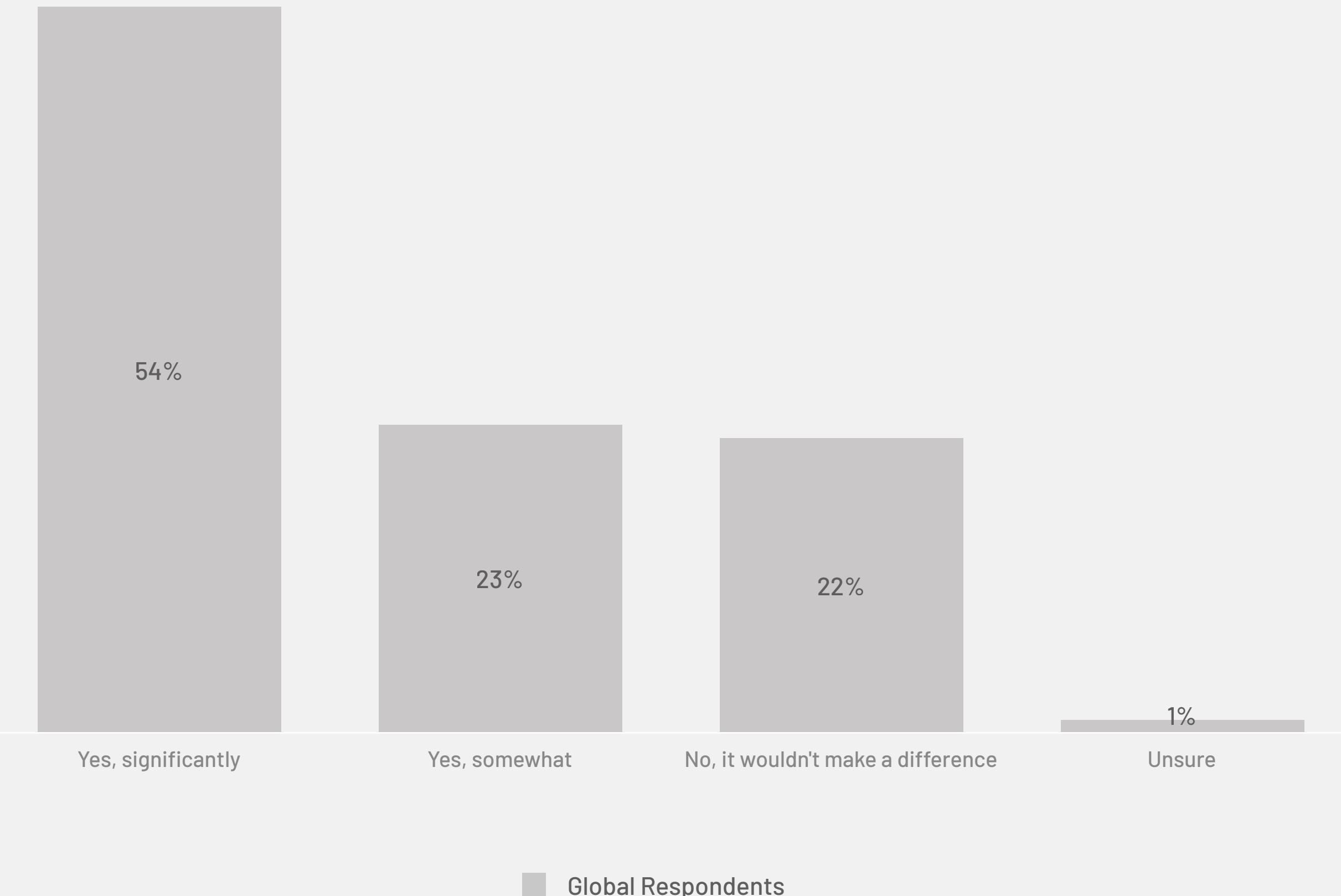
For the majority of global respondents, attending a race is seen as a crucial part of the F1 experience and deeply tied to their fandom.



On a scale of 1-10, how important is attending a live Formula 1 race to your fandom experience?

Local F1 Race Interest

Race regionality is pivotal as more than 3 of 4 global respondents state that having a race in their country would increase their interest in F1.



Do you think having a F1 race in your country does/would increase your interest in the sport?

The Importance of 'Home' Races.

3 in 4

of surveyed fans globally say attending a race in their home country makes them feel more connected to the sport.

This figure is higher for:

80% 87%

female fans

fans under 35

Home race sentiment is strongest in Asia-Pacific and ROW markets where:

80-87%

express this view.

92% 90% 86%

Japan

India

Brazil

stand out as countries where localized race presence would increase their interest in F1.

Expanding Beyond Race Weekends

While race attendance is up, fans are also embracing on-race live experiences that extend F1's cultural footprint.

24%

of global surveyed fans have already attended F1-related events like parties, watch-alongs, or meetups.

41%

who haven't attended an F1 fan experience plan to do so in the future.

Interest is highest in the U.S., where **nearly half** say they are likely to attend such events in the future—demonstrating appetite for off-track experiences.

Countries like:

34%

33%

30%

Italy

Netherlands

Japan

show strong participation, with

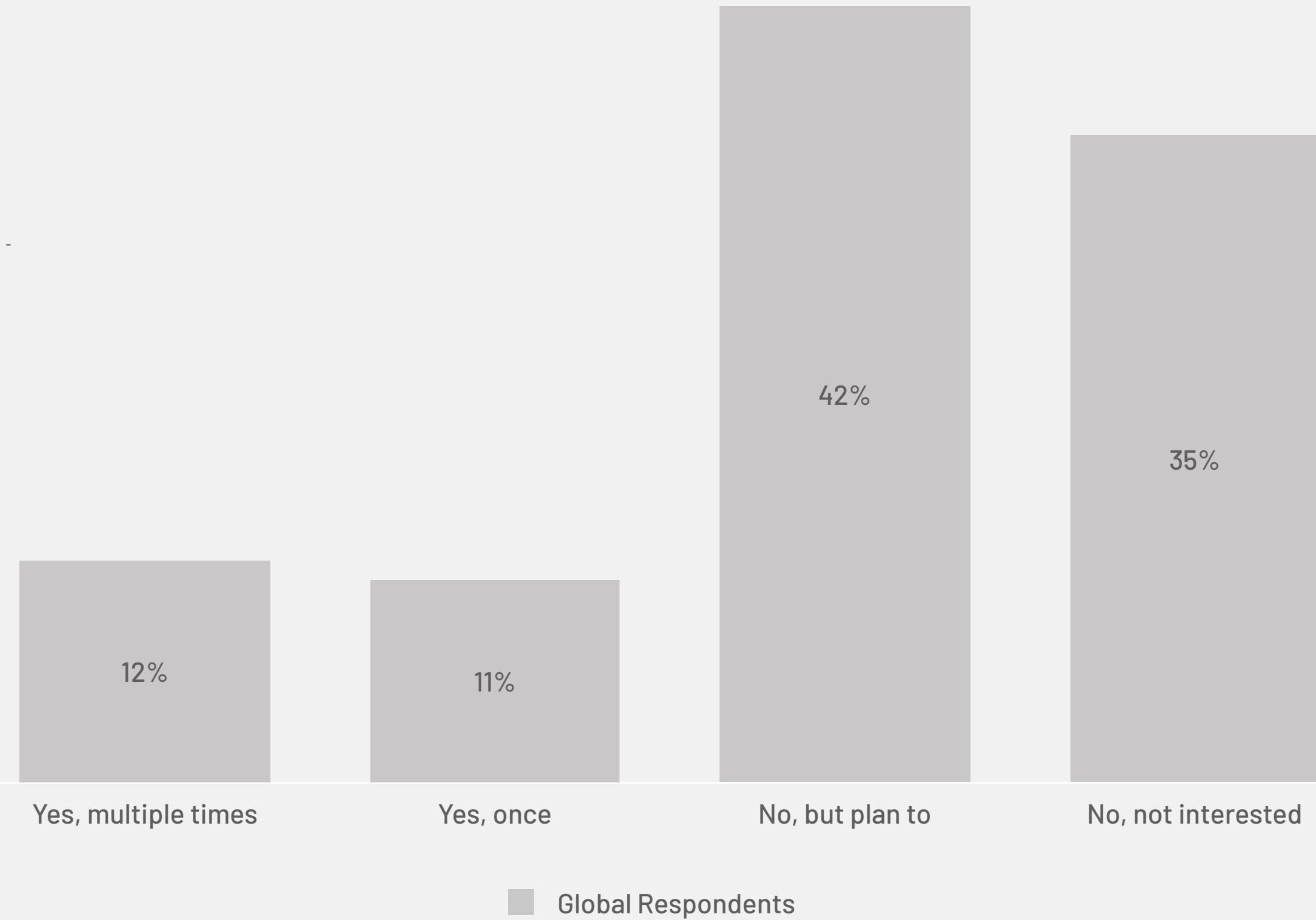
78%

India

most likely to show interest in future attendance.

Attended F1 Experience

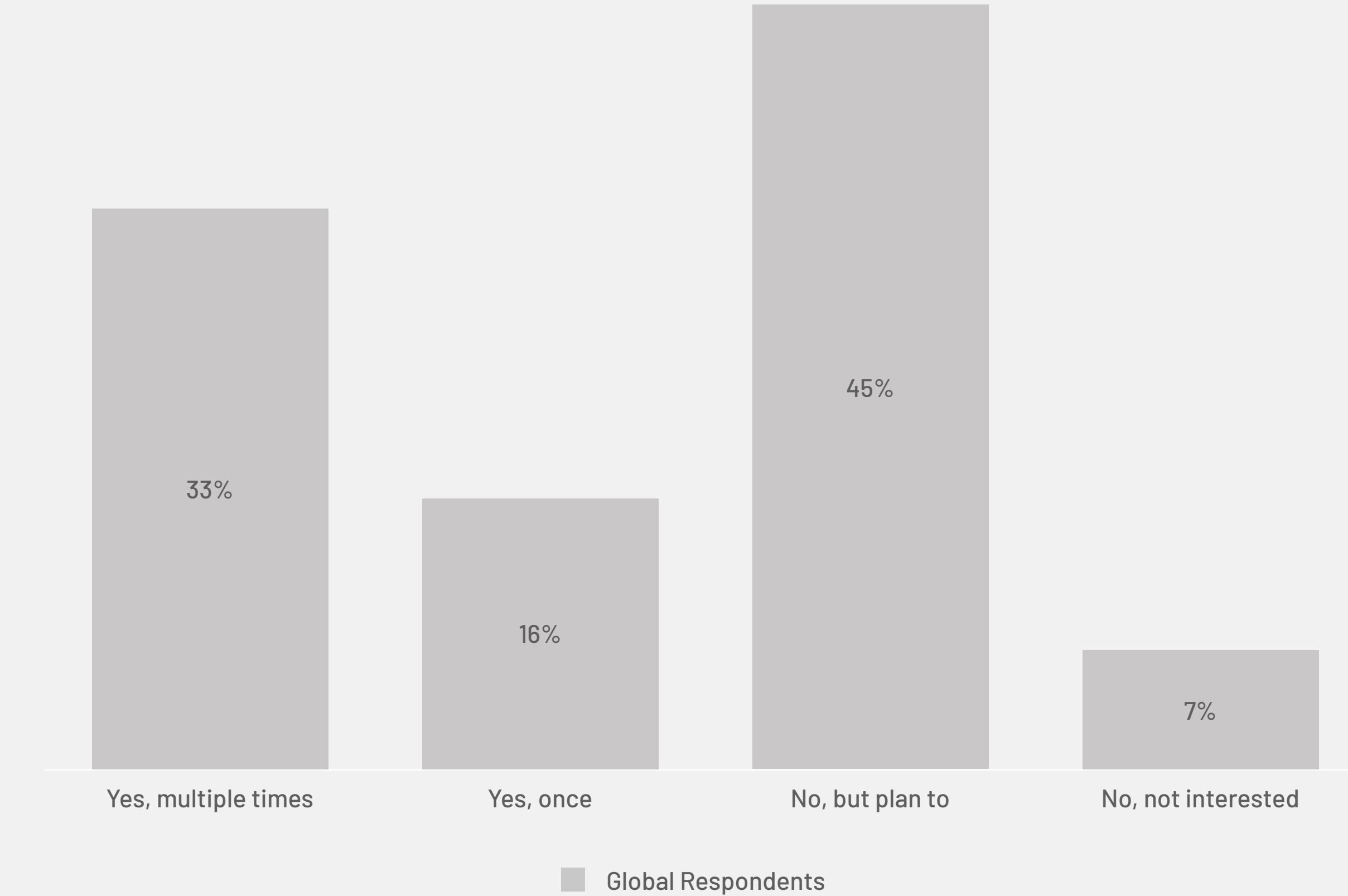
Most global respondents have attended or are interested in attending an F1 fan experience, though fewer than 1 in 4 have done so already.



Have you ever attended an F1-related fan experience (e.g. parties, meetups, or other social events)?

Attended F1 Race

Nearly half of F1's global respondents have already attended a race and those who haven't show strong intent on attending in the future.



Have you ever attended a Formula 1 race in person?

Digital Engagement Is Fueling Real-World Demand.

Digital fandom and live participation are increasingly interconnected. Across regions and demographics, one clear pattern is emerging: **fans who engage with F1 online are the most eager to experience it in person**. From social media to video platforms, digital content isn't replacing live events—it's increasing appetite for them.

This feedback loop is especially strong among newer and younger fans. These audiences are discovering F1 through streaming, short-form video, and driver-driven content—and that daily connection is translating into real-world intent. Globally, fans who follow the sport on digital platforms are more likely to say they want to attend a race, join a meetup, or explore F1 beyond the screen.

98% of Gen Z fans within the survey engage with F1 content weekly

Yet only:

21%

have attended a race,

While:

95%

of non-attendees plan to go in the future.

This pattern is strongest in the **U.S.**, but also appears in **Asia-Pacific** and **Latin America**, where newer fans often discover F1 through digital channels before pursuing on the ground experiences.

This convergence signals a new frontier for F1 engagement— one where fans are not passively watching but shaping F1's cultural presence, blending digital and physical moments into a continuous, emotionally resonant fan journey.

Strategic Implications.

An evolving live engagement model.

The data confirms that live and in-person experiences are now a core component of fandom, not an optional extra.

Intent signals are especially strong:

- Newer, younger, and female fans are expanding rapidly across the global base.

Experience gaps remain:

- In key markets like the U.S., intent to attend far exceeds current attendance, underscoring untapped opportunity.

Home races are loyalty drivers:

- Fans overwhelmingly cite the impact of local races on their emotional connection—especially in emerging and underserved markets.

Off-track engagement is growing:

- With one in four fans attending non-race events, and over half of non-participants expressing interest, there is a clear mandate to scale these offerings.

Digital fuels demand:

- Fans who engage frequently online are the most motivated to show up in person. Content isn't cannibalizing—it's converting.

Together, these signals point to a strategic imperative: investments in fan access beyond race day must continue—meeting fans in more locations, more formats, and more culturally resonant ways.

F1 Spotlight 

Expanding Fan Touchpoints Beyond the Race Weekend.

Together, these efforts signal a clear evolution: F1 is no longer defined solely by race day. It is a sport powered by storytelling, lifestyle, and access—meeting fans wherever they are and giving them new ways to connect.

Formula 1 has grown from individual race moments to a global, year-round cultural movement. The 2025 calendar now includes 24 races across four continents—its largest and most geographically diverse slate yet. This expansion reflects F1's ambition to meet rising fan demand in both established and emerging markets, and to deliver the sport at a global scale.

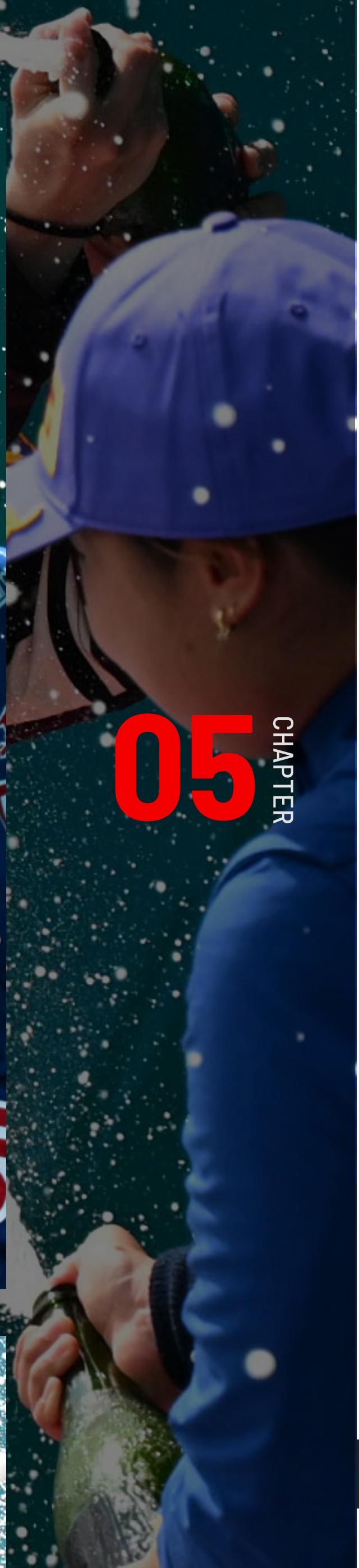
Since the last Global Fan Survey in 2021, F1 has added high-profile races in Miami and Las Vegas—events designed not only for competition, but for culture, commerce, and wide-appealing attention. Las Vegas, promoted by F1 itself, represents a bold evolution in how the sport shows up in key markets. With additional races in Montreal, Mexico City, and São Paulo, a quarter of the current calendar now falls within broadly U.S.-friendly time zones, reinforcing North and South America as priority regions.

Fan demand is also intensifying in other parts of the world. Asia-Pacific audiences are calling for more localized experiences and “home” races, and interest in an African Grand Prix remains strong. These regional signals are not only shaping the future of the race calendar—they’re expanding the definition of F1 fandom itself.

To complement the trackside expansion, F1 is also diversifying its fan touchpoints. The F1 Exhibition, an immersive traveling showcase, has visited cities like Madrid, London, Toronto, and Buenos Aires, bringing the sport’s history and innovation to life. F1 Arcade—offering simulator racing, watch parties, and hospitality—now operates in major U.S. and UK cities, helping fans stay engaged off-season and off-track.

CHAPTER

05 F1 Academy



CHAPTER

05

F1 Academy Signals a New Kind of Growth.

One standout in 2025 is the rapid rise of F1 Academy, the all-female series backed by F1 teams and sponsors.

23%

of respondents say they now follow F1 Academy—nearly double the figure for W Series in 2021.

Among female fans, it jumps to:

42%

making it their second-most followed series behind F1 itself.

Emerging fans are fueling momentum:

37% 36%

of Gen Z

of newer fans

The early success of F1 Academy proves that when visibility and narrative depth are prioritized, inclusive motorsport storytelling finds eager audiences—especially among fans looking for representation and connection.

Strategic Implications.

New stories.

- The rise of F1 Academy reflects fan appetite for new stories. The rapid growth in its following—especially among Gen Z and women—shows that fresh formats and inclusive talent pipelines can create sticky engagement.

Rising female talent.

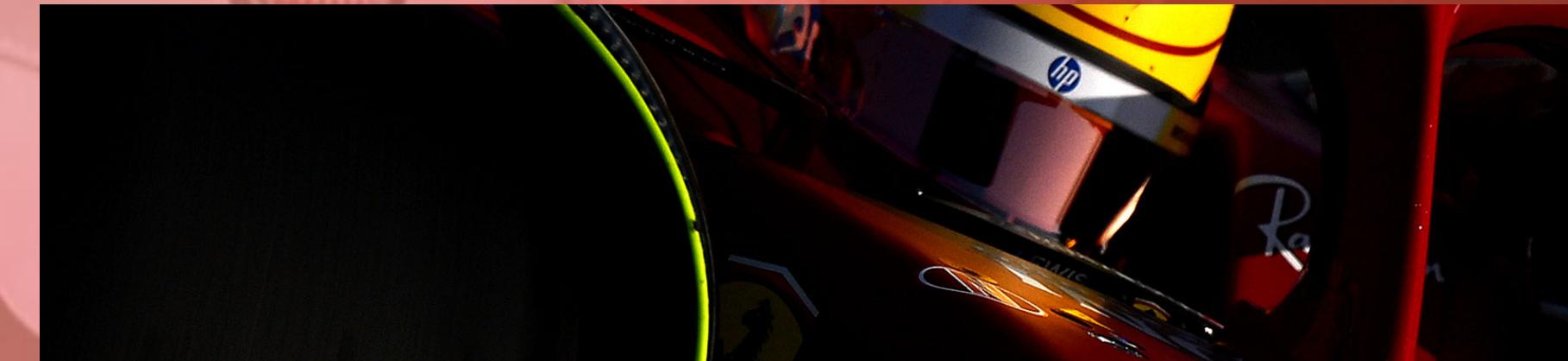
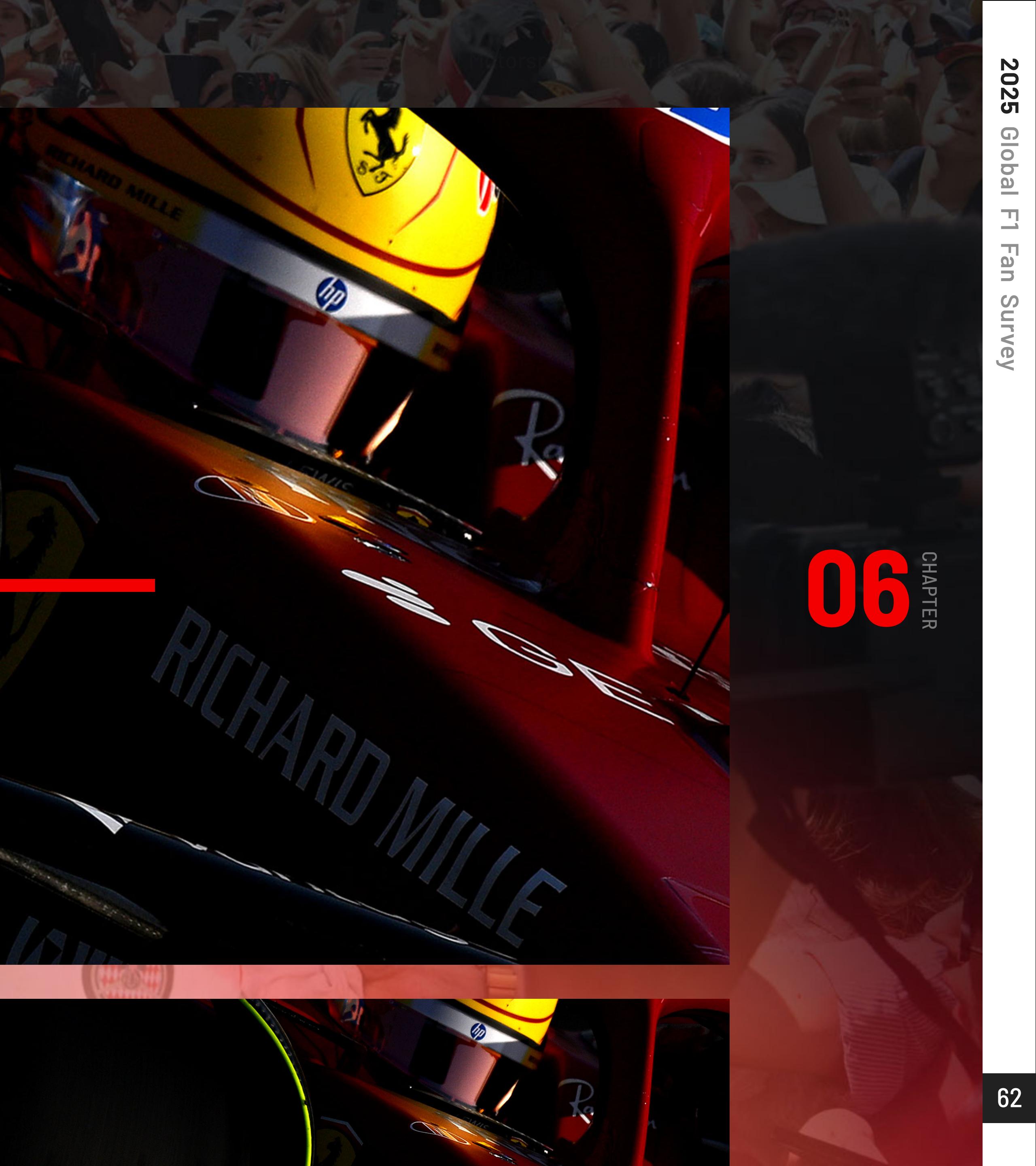
- The F1 Academy Netflix series spotlights rising female talent, driving diversity and fan engagement through binge-worthy storytelling. Continued investment in properties like this can help sustain momentum and widen appeal.

CHAPTER

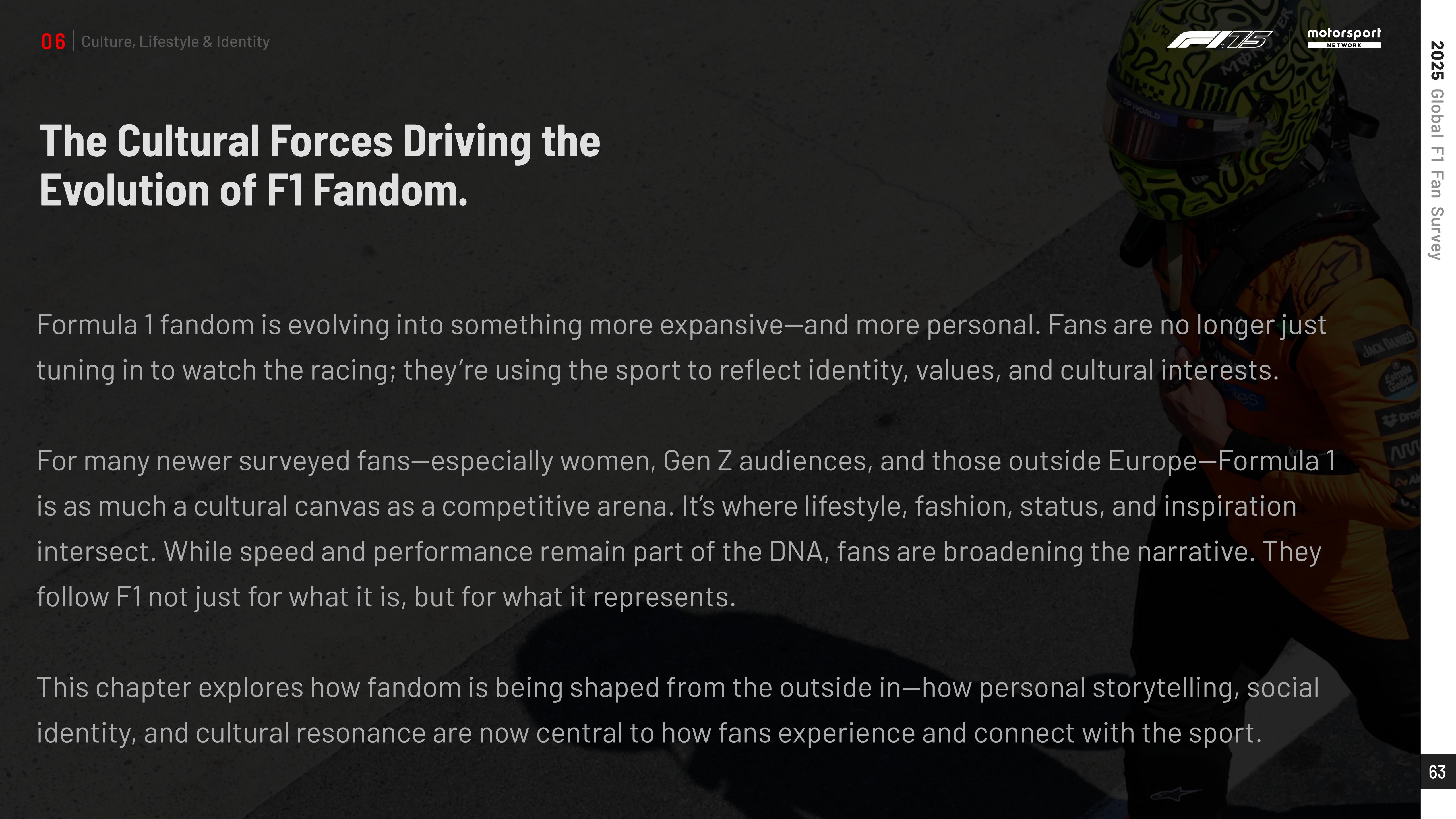
06

Culture, Lifestyle & Identity

CHAPTER

06

The Cultural Forces Driving the Evolution of F1 Fandom.



Formula 1 fandom is evolving into something more expansive—and more personal. Fans are no longer just tuning in to watch the racing; they're using the sport to reflect identity, values, and cultural interests.

For many newer surveyed fans—especially women, Gen Z audiences, and those outside Europe—Formula 1 is as much a cultural canvas as a competitive arena. It's where lifestyle, fashion, status, and inspiration intersect. While speed and performance remain part of the DNA, fans are broadening the narrative. They follow F1 not just for what it is, but for what it represents.

This chapter explores how fandom is being shaped from the outside in—how personal storytelling, social identity, and cultural resonance are now central to how fans experience and connect with the sport.

F1's Core Identity Still Resonates.

Across all segments—regardless of age, gender, geography, or tenure—surveyed fans associate Formula 1 with excellence in performance and innovation.

71%

of fans say high performance and precision are defining attributes of the sport.

62%

cite innovation and technology as central to F1's identity.

These remain the top two associations across fan types, underscoring that while culture, lifestyle, and storytelling are gaining traction—especially among newer fans—the technical mastery of the sport remains foundational.

This is not an either/or. It's a both/and—where performance anchors the sport and personality elevates it.

Fashion, Style, and Lifestyle Are Part of the Appeal.

These insights point to the rise of lifestyle-led engagement—where merchandise, brand partnerships, and visual identity influence how fans express their passion for F1. This demand is being met by teams with increasing collaborations with partner brands and external brands. F1 Hub also addresses this in US markets for fans seeking limited edition F1 merchandise drops.

1 in 3

of global respondents consider fashion and style important in their F1 fandom.

This number is higher among:

58% 58% 59%

Women

Gen Z

Newer fans

U.S. fans show growing interest in lifestyle appeal, with:

58%

of women and

58%

Gen Z

considering fashion an important part of their fandom. While overall engagement with fashion remains moderate in the U.S. 1 in 3 younger U.S. fans and women show a stronger connection to these elements.

Fashion remains important in Asia-Pacific:

56%

as opposed to Europe, where it plays a less central role in fandom.

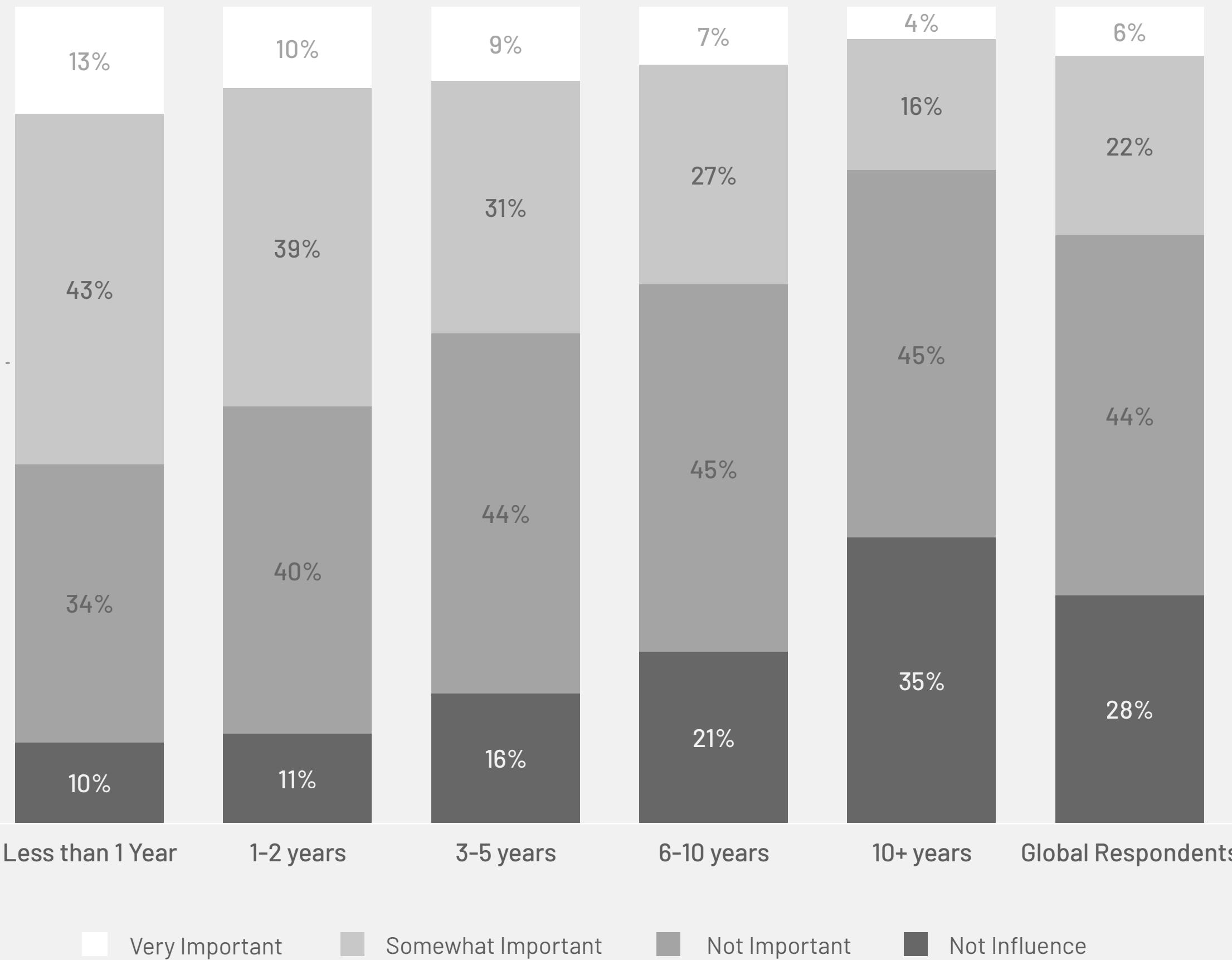
Among fans aged 45+:

80%

report that fashion has little to no effect on their interest in F1.

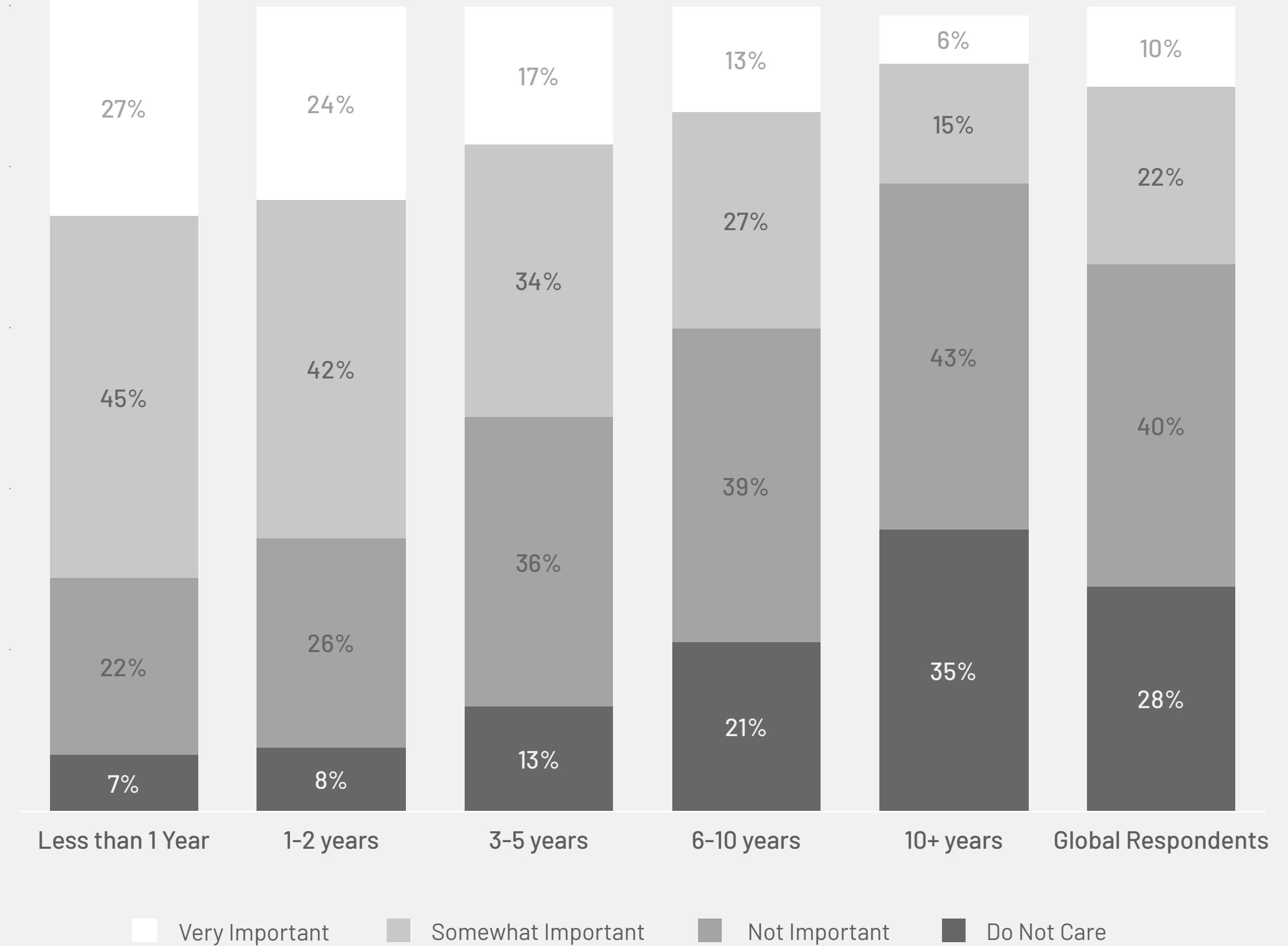
Lifestyle Importance

New fans are pulled in by F1's prestige, while longtime followers dismiss lifestyle elements as central to their fan experience.



Importance of Fashion/Style

About one in three global respondents say fashion influences their view of F1, rising sharply among fans of two years or less.



How important is the lifestyle aspect (glamour, luxury, celebrity) to your enjoyment of Formula 1?

How important are fashion and style to your perception of Formula 1?

Glamour, Celebrity & Personal Narratives Matter.

Nearly 1 in 3 surveyed fans,

28%

say the glamour, luxury, and celebrity side of F1 enhances their fandom. Similar to fashion and style, these perceptions are especially concentrated among newer fans, younger fans, and female fans, especially in Asia-Pacific and ROW.

In the U.S.:

30%

of younger fans and women see these lifestyle signals as part of their F1 fandom, reflecting how these elements influence broader fan behavior in this market.

Up to:

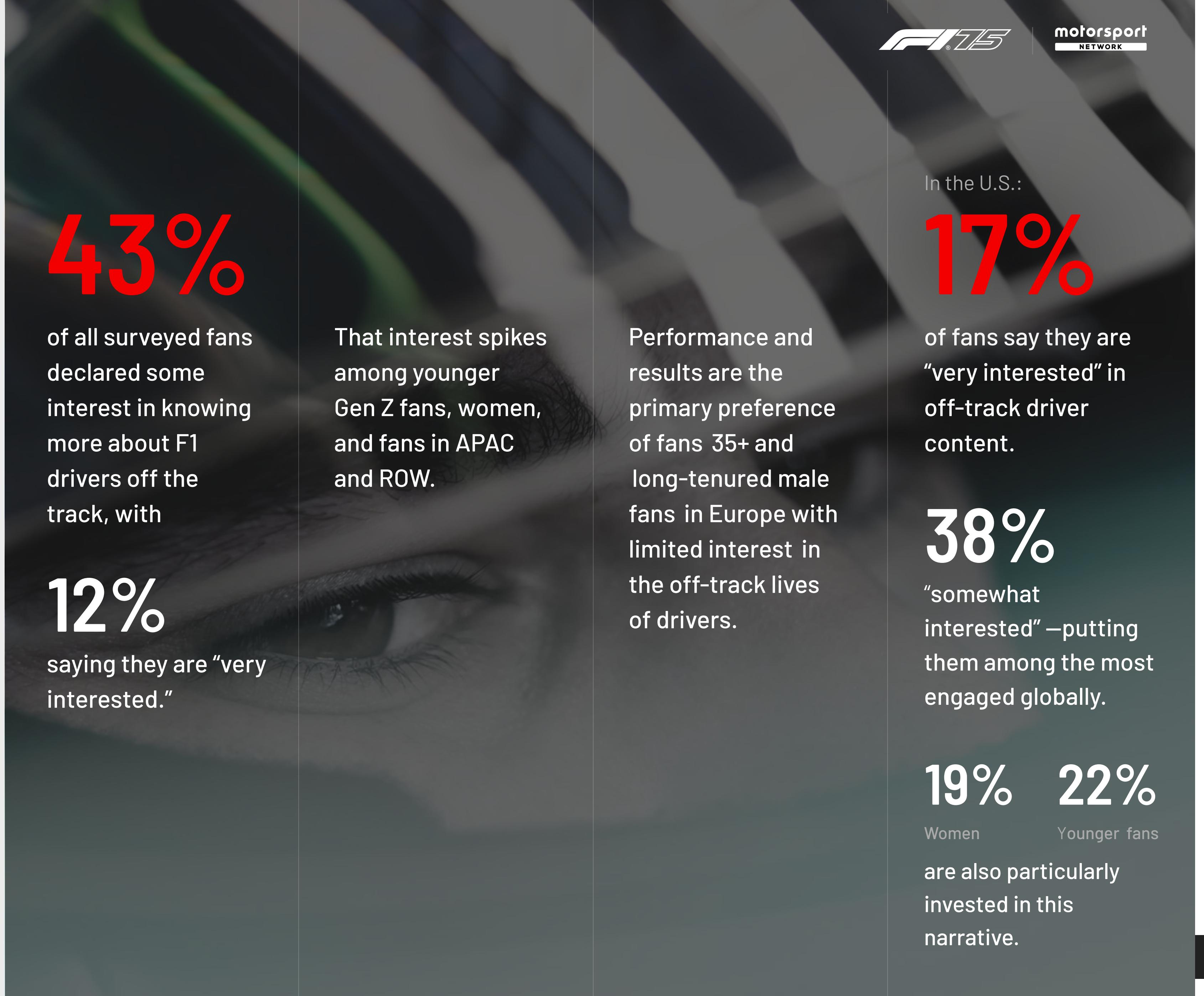
16%

of newer, younger, and female fans cite 'Drive to Survive' as their primary entry point into the sport, demonstrating the power of celebrity, personal narratives and glamour to connect fans with F1.

Interest in Drivers Behind their Visors

Fans aren't just following F1 for what happens on the track—they want a window into the personalities and lives of the drivers themselves.

This rising interest reflects a broader trend: personality and access are powerful fandom drivers for newer audiences—especially those entering the sport through cultural, social, and storytelling channels.



43%

of all surveyed fans declared some interest in knowing more about F1 drivers off the track, with

12%
saying they are "very interested."

That interest spikes among younger Gen Z fans, women, and fans in APAC and ROW.

Performance and results are the primary preference of fans 35+ and long-tenured male fans in Europe with limited interest in the off-track lives of drivers.

In the U.S.:

17%

of fans say they are "very interested" in off-track driver content.

38%

"somewhat interested"—putting them among the most engaged globally.

19% 22%

Women Younger fans
are also particularly invested in this narrative.

Strategic Implications.

F1's cultural influence is expanding. Fans are imagining for themselves what it means to be an F1 supporter, engaging not just with the sport, but with the image, values, and identity it projects.

Fandom is becoming personal.

- For newer surveyed fans, especially Gen Z and women, F1 is more than racing—it's a lifestyle. These fans are drawn to fashion, status, personality, and storylines that reflect their own interests and aspirations.

Identity is a gateway to engagement.

- As fans increasingly connect through social and cultural touchpoints, content and activations that speak to identity—whether through style, status, or personality—offer powerful entry points for deeper engagement.

Drivers are cultural anchors.

- Personal narratives, social media presence, and off-track visibility are helping fans connect with drivers as personalities—not just athletes. This shift opens doors for storytelling, complementary partnerships, and off-week engagement.

Lifestyle is now a brand asset.

- F1's associations with luxury, glamour, and global prestige give it unique positioning among sports properties. These attributes resonate most strongly with the next wave of fans—and can be leveraged to drive both loyalty and premium brand alignment.

What's aspirational must also be accessible.

- While exclusivity is a key part of F1's appeal, fans are looking for ways to engage that feel authentic and participatory. Bridging the gap between aspiration and access will be critical to long-term cultural relevance.

F1 Spotlight 

Sport, Style & Self-Expression.

F1's cultural influence now stretches far beyond the grid. In recent seasons, the sport has embraced its identity as a global lifestyle brand—blending motorsport with fashion, celebrity, and entertainment in new and resonant ways.

Luxury collaborations are a growing part of the brand's cultural presence. In 2025, F1 announced a landmark 10-year global partnership with LVMH, bringing iconic brands like Louis Vuitton, Moët & Chandon and TAG Heuer into the fold. The deal includes Louis Vuitton's title sponsorship of the Australian Grand Prix, signaling F1's deepening ties to global luxury and cultural capital.

F1's 75th anniversary has also inspired limited-edition collaborations like its Peanuts Worldwide x Snoopy collection, offered through the official F1 Hub—an example of how heritage meets playful expression in ways that resonate with younger and newer fans.

Drivers are leading the charge as cultural ambassadors. Lewis Hamilton, long known for his fashion-forward approach, appeared at Ferrari's Maranello launch in a head-to-toe Ferragamo look—and most recently co-chaired the 2025 Met Gala. Charles Leclerc's partnership with Armani, Zhou Guanyu's association with Dior, and Pierre Gasly's front-row presence

F1 Spotlight 

Sport, Style & Self-Expression.

at Fashion Week events all reinforce how F1's talent pool is increasingly recognized in global style circles.

F1 has also doubled down on storytelling. Netflix's *Drive to Survive* continues to be a leading gateway into the sport, particularly for younger and female fans. New content offerings like *F1: The Academy*, *The Seat* (documenting Mercedes' next-generation driver Kimi Antonelli), and an array of behind-the-scenes team content are helping humanize the sport's most iconic figures. This visibility is especially meaningful to fans who arrive through culture before competition.

Celebrity alignment is surging. The 2025 Miami Grand Prix featured appearances from global icons like Zendaya, Bad Bunny, Tom Brady, Rihanna, and Roger Federer—turning the race into a red-carpet cultural moment. These appearances reinforce the perception of F1 as both a sporting spectacle and a scene-setting lifestyle brand.

Whether through fashion, media, or cultural cachet, modern F1 fandom is fueled by more than speed. It's about aspiration, identity, and access—inviting fans to see themselves not just in the stands, but in the story.

CHAPTER
07

Sponsorship Impact & Commercial Influence

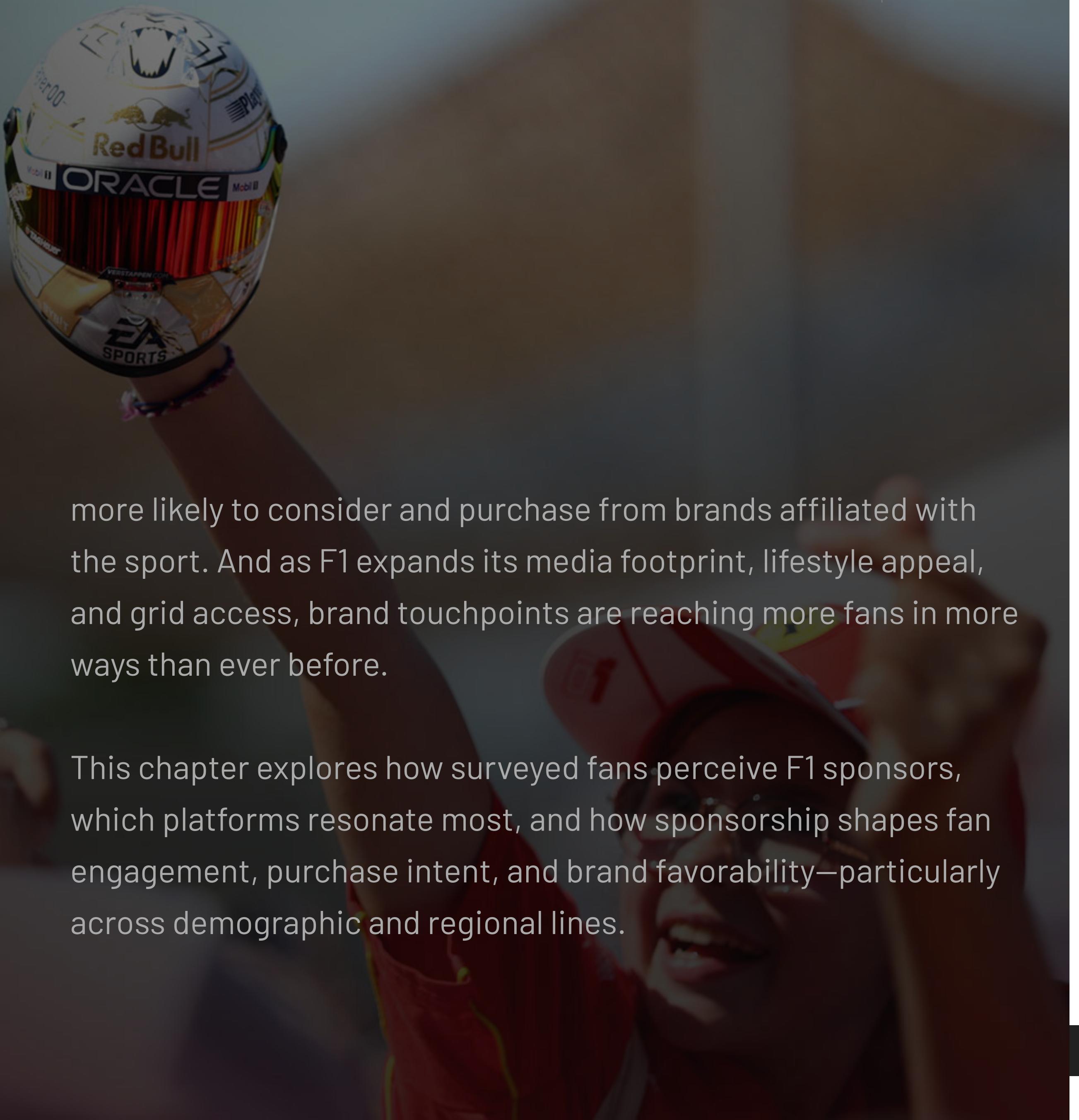


CHAPTER
07

More Than a Sticker on an F1 Car – Sponsors Shape the F1 Fan Experience

Formula 1's global reach and cultural momentum have made it one of the most valuable platforms in sport for brands seeking relevance, visibility, and emotional connection. With more than 300 active sponsorships across teams, drivers, and the league itself, F1 is no longer just a logo game—it's a full-spectrum partnership opportunity that influences perception and, increasingly, behavior.

For fans, brand association with F1 isn't just recognized—it's meaningful. Younger audiences, especially Gen Z and women, are



more likely to consider and purchase from brands affiliated with the sport. And as F1 expands its media footprint, lifestyle appeal, and grid access, brand touchpoints are reaching more fans in more ways than ever before.

This chapter explores how surveyed fans perceive F1 sponsors, which platforms resonate most, and how sponsorship shapes fan engagement, purchase intent, and brand favorability—particularly across demographic and regional lines.

Sponsorship Fuels the Sport—But Influence Varies by Fan.

Respondents broadly support the presence of sponsorship in Formula 1, with 76% globally saying it contributes positively to the sport.

76%

globally say it contributes positively to the sport.

Enthusiasm is highest among fans in Asia-Pacific and the Americas.

76% of U.S. surveyed fans say sponsorship plays a positive role in the sport—mirroring global sentiment.

Yet, the effect on purchase behavior varies:

Older fans are most likely to say sponsorship is “essential” to the sport—but least likely to be influenced by it when making purchases.

Younger fans, women, and newer followers are far more likely to consider and buy from F1-affiliated brands.

This gap between endorsement and activation underscores a key point: fans value sponsorship’s role—but its impact depends on who the fan is and how they connect to F1.

Brand Associations Drive Consideration – Especially for Emerging Fans.

Globally:

33%

of surveyed F1 fans say they are more likely to consider a sponsor's product over a non-sponsor.

That jumps to:

40%

Among Gen Z

38%

Among newer fans
(≤5 years)

50%

In Asia-Pacific.

Women also show elevated brand receptivity compared to male fans, pointing to a growing opportunity for lifestyle and identity-based activations.

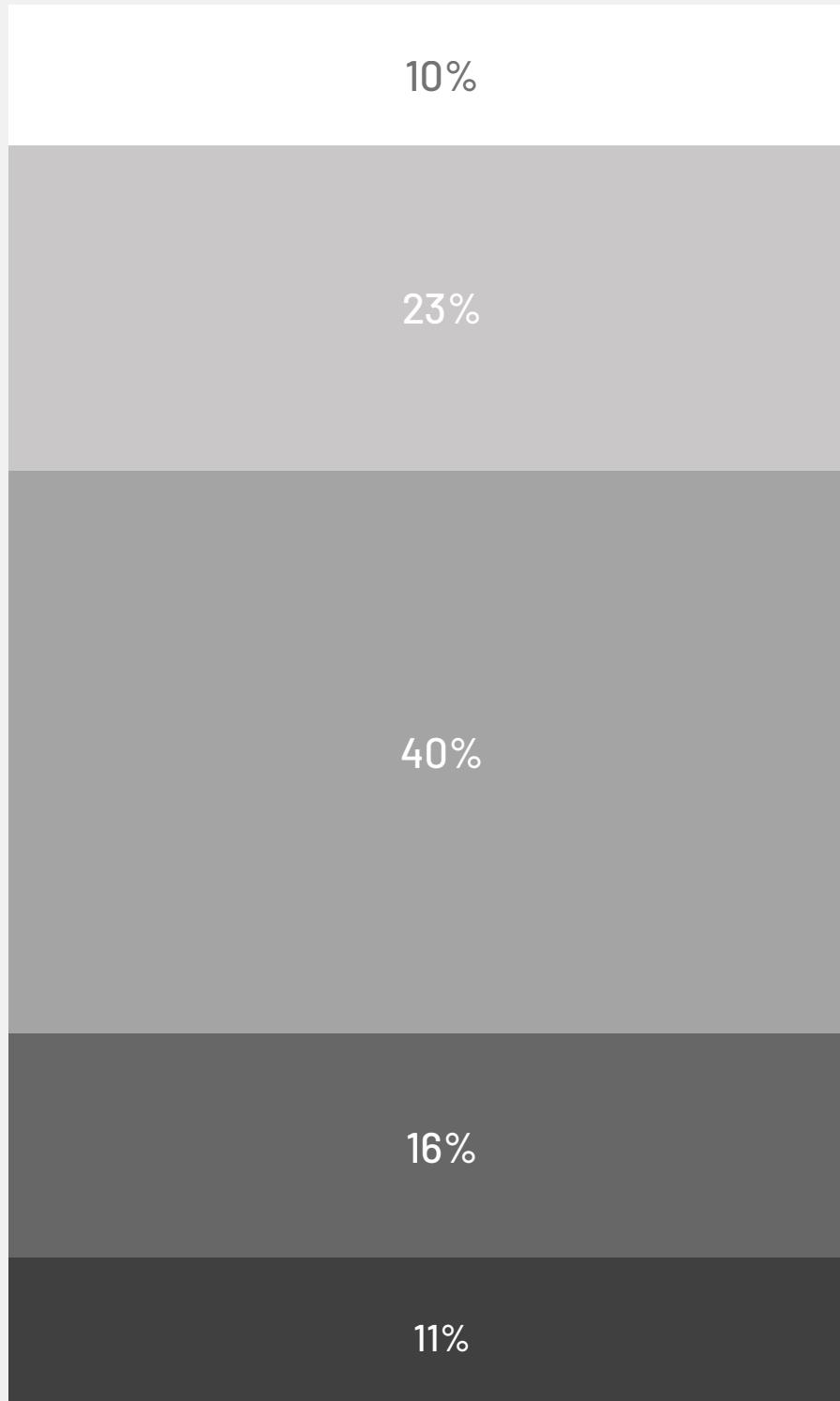
U.S. fans fall near the global average:

32%

say they're more likely to consider a sponsor's product. But just like global trends, the lift is stronger among U.S. Gen Z (39%) and women (41%).

Sponsorship Impact

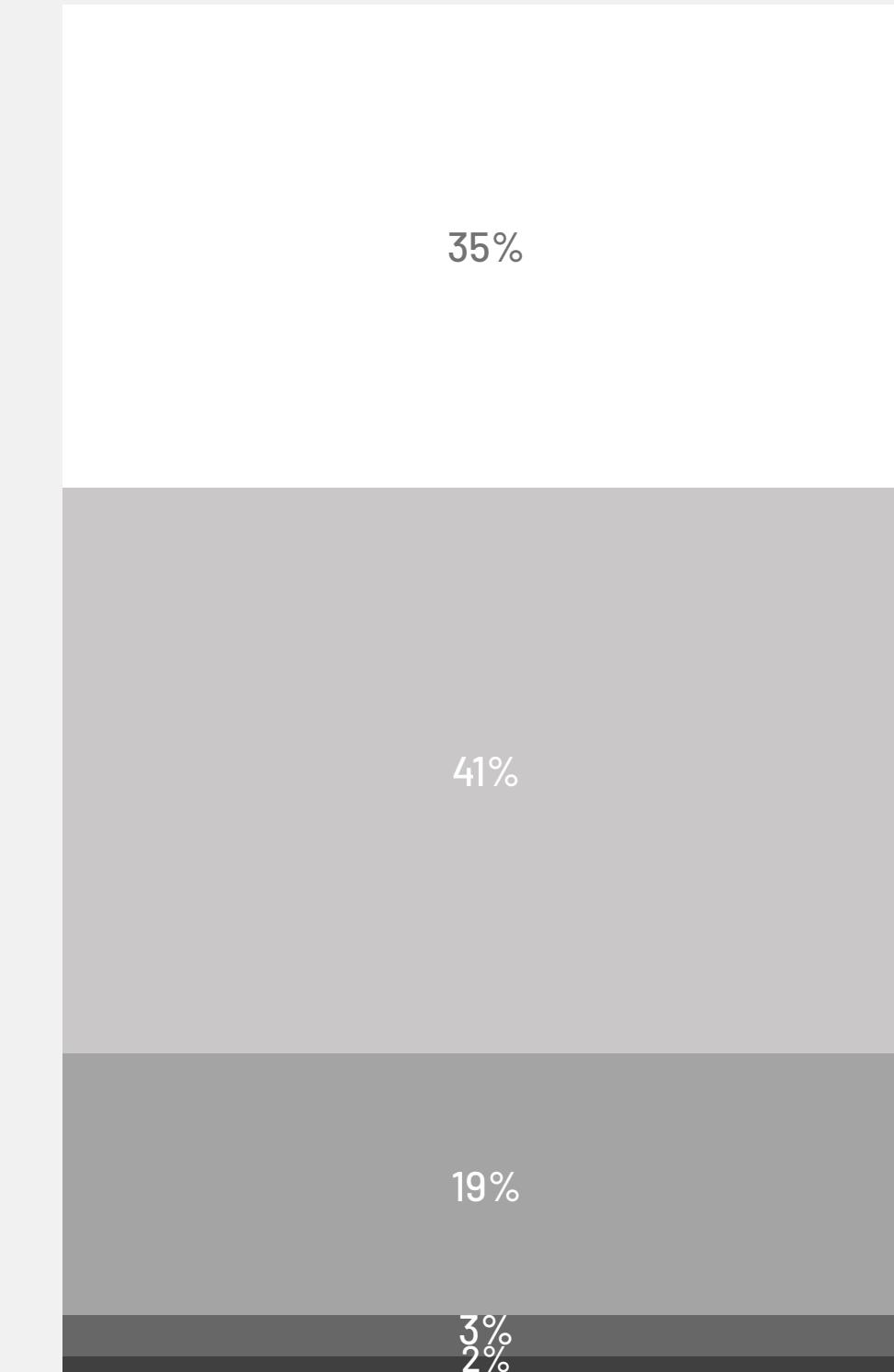
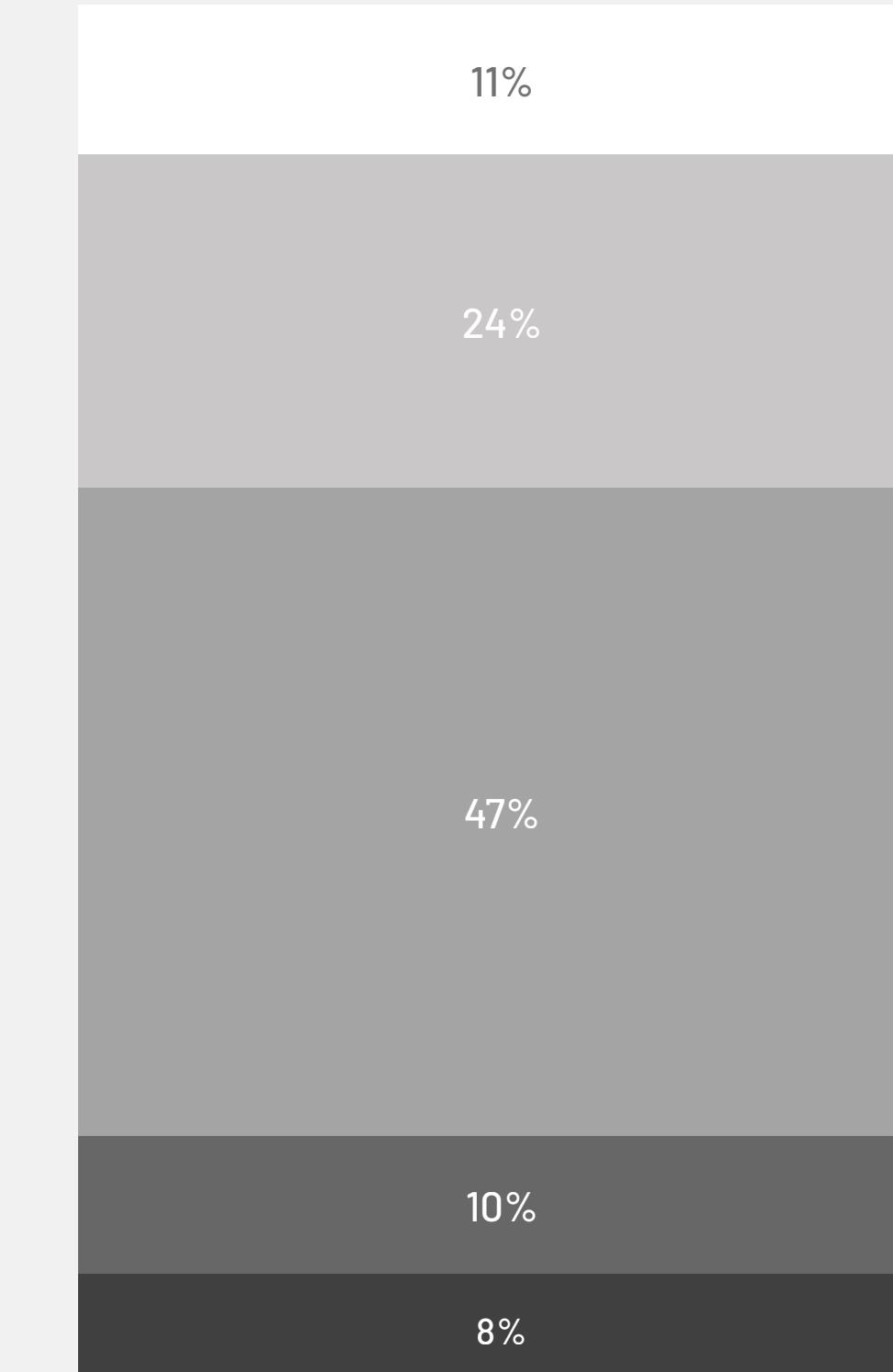
Global respondents see sponsorships as a key driver of F1's success and tend to hold brands in higher regard because of their F1 affiliations.



I am more likely to consider purchasing products from companies involved in F1.

I think more highly of companies who sponsor or support F1.

Sponsorship contributes greatly to the success of F1.



Strongly Agree Agree Neutral Disagree Strongly Disagree

Strategic Implications.

The data makes one thing clear: sponsorship in F1 is not just a logo—it's a lever for brand trust, cultural relevance, and audience engagement. But its impact is shaped by who the fan is, where they're from, and how they connect with the sport.

Sponsorship is foundational—but purchase behavior varies.

Gen Z and women are high-conversion audiences.

Teams and drivers are the new front doors.

U.S. and APAC markets require tailored strategy.

The brand palette is expanding.

- Older fans deeply respect sponsorship's role, but younger and newer fans are the ones most likely to act on it. This makes storytelling, not just visibility, key to conversion.

- These fans over-index in brand engagement, especially when partnerships are tied to driver personalities or lifestyle values. Brands targeting them should go beyond logos and lean into narrative and relevance.

- Collaboration between F1, drivers, and teams elevates perception. For brands seeking emotional resonance, focusing on human stories across the whole F1 ecosystem delivers greater performance than standard media inventory.

- In the U.S., Gen Z and female fans respond best to culturally aligned, personality-led partnerships. In Asia-Pacific, the overall openness to sponsor influence is the highest globally.

- F1's cultural evolution has opened space for categories beyond luxury and auto. From fast food to fashion, family to fintech—brands that meet fans where they are culturally will win share of heart, mind, and wallet.

F1 Spotlight 

Broadening the Partnership Platform.

F1's cultural and commercial growth is redefining what it means to be a partner. Recent brand integrations show that F1 is no longer confined to auto and luxury – it's now a platform for storytelling, identity, and consumer relevance.

Prestige Partnerships

The 10-year global partnership with LVMH brings prestige and fashion into the sport's core narrative.

Family & Lifestyle Partnerships

With KitKat, McDonald's, Hot Wheels, and LEGO signal a deliberate push into family, lifestyle, and youth markets.

U.S. Activations

Now include F1 Hub's merch drops, F1 Arcade, and driver-aligned brand collaborations – bringing the sport closer to everyday consumer experiences.

For brands, the message is clear: sponsoring F1 is no longer just about logo placement. It's about cultural currency, emotional relevance, and turning fandom into measurable results.

CHAPTER

08 U.S. Highlights

CHAPTER



An Emerging Powerhouse for F1 Fandom.

Formula 1's footprint in the United States is no longer a curiosity—it's a fast-developing opportunity. Long considered a secondary market for the sport, the U.S. has emerged as one of F1's most promising engines of fan growth, cultural relevance, and commercial potential. A new generation of American fans is discovering the sport—and engaging with it on their own terms – creating brand engagement opportunities at scale.

Crucially, the U.S. audience isn't just growing in size—it's growing in commitment. Ninety-five percent of surveyed U.S. fans say they'll still be following the sport five years from now, and 68% say they follow F1 more than any other sport they watch. From content to culture, fashion to fandom, the U.S. market is proving it's not just along for the ride—it's helping to shape the road ahead.

This section explores the behaviors, motivations, and opportunities defining F1's rise in America—and what it means for the sport's next era of global growth.

Standout Themes.

Growing Fan Base With a Generational Shift.

While anchored by a substantial base of longtime fans, F1 is attracting a new wave of younger fans and women. This new cohort is not just passively watching, they're highly invested super fans. Women make up 3 in 4 of all new U.S. surveyed fans; nearly 1 in 2 (47%) of new fans are Age 18-24.

Committed to the Sport.

Regardless of whether they are new to the sport or not, most U.S. surveyed fans intend to stay fans for the long term – 95% see themselves following F1 in 5 years. 68% say they follow F1 more than other sports they watch.

Always-on Fandom.

Digital content and community are integral to the F1 fan experience. A significant portion of U.S. fans engage with F1 content daily, which is even higher for younger fans, who are also seeking out community at a higher rate. Visual, community-driven interactive touchpoints are integral for engaging this new generation of fans. 59% engage with F1 content every day and that grows to 70% among fans Age 18-24.

Emerging Fans Lean in to Community/Interactive Touch Points.

Among younger respondents (Age 18-24), 94% see social media as important to their fandom, 88% use platforms like YouTube and Twitch for F1 content, 51% participate in online discussions about F1.

Standout Themes.

Emerging Fans Lean in to Community/Interactive Touch Points.

- Among younger respondents (Age 18-24), 94% of see social media as important to their fandom, 88% use platforms like YouTube and Twitch for F1 content, 51% participate in online discussions about F1.

Embracing the Culture of F1.

- While F1 remains synonymous with high-performance, innovation, and technology (these are the top 2 themes associated with F1), the glamour, luxury, fashion, and celebrity culture of F1 is appealing to a new generation of fans. 84% of U.S. surveyed fans describe F1 as exclusive and glamorous with fashion and style being important to two-thirds of new fans.

Methodology:

US-focused quantitative analysis of 16,874 respondents to understand the makeup of the US fanbase, their behaviors, engagement types, and perceptions across different ages and levels of fandom.

U.S. Spotlight 

Today's F1 Fans: young, diverse, highly engaged.

75%

of new U.S. fans are women,

Nearly half:

47%

are aged 18-24.

68%

say they follow F1 more than
any other sport they watch.

95%

say they follow say they plan
to follow the sport five years
from now, signaling long-
term commitment.

In the U.S., F1 fandom reflects the global surge in passion—but with its own distinct texture. American fans, especially newer and younger ones, are driving the sport's emotional relevance and growth potential in the region.

The profile is clear: they're younger, more diverse, and digitally native, bringing new energy and expectations to how the sport is experienced. These fans aren't just showing up for race day—they're connecting with F1 daily through content, conversation, and community. 70% of respondents 18-24-year-olds engage with F1 content every day, and 94% say social media is central to their fandom.

Emotional Engagement, Driver-Led Fandom

Thrill and innovation attracts and retains F1 audiences, with a passionate approach:

89%

of U.S. respondents say they are emotionally invested in the outcome of F1 races – this jumps to 95% among new fans (following less than 1 year).

U.S. fans over-index in driver-led fandom:

40%

identify primarily as fans of specific drivers,

vs.

21%

who support a particular team.

Loyalty towards one driver increases with younger fans:

23%

of respondents under 18 are loyal to one driver,

vs.

10%

of those age 65+.

More influenced by local drivers:

1 in 3

of those age 18-24 said that having a driver from their country would significantly increase their interest in the sport.

American surveyed fans are

2x

more likely to follow a driver over a team.

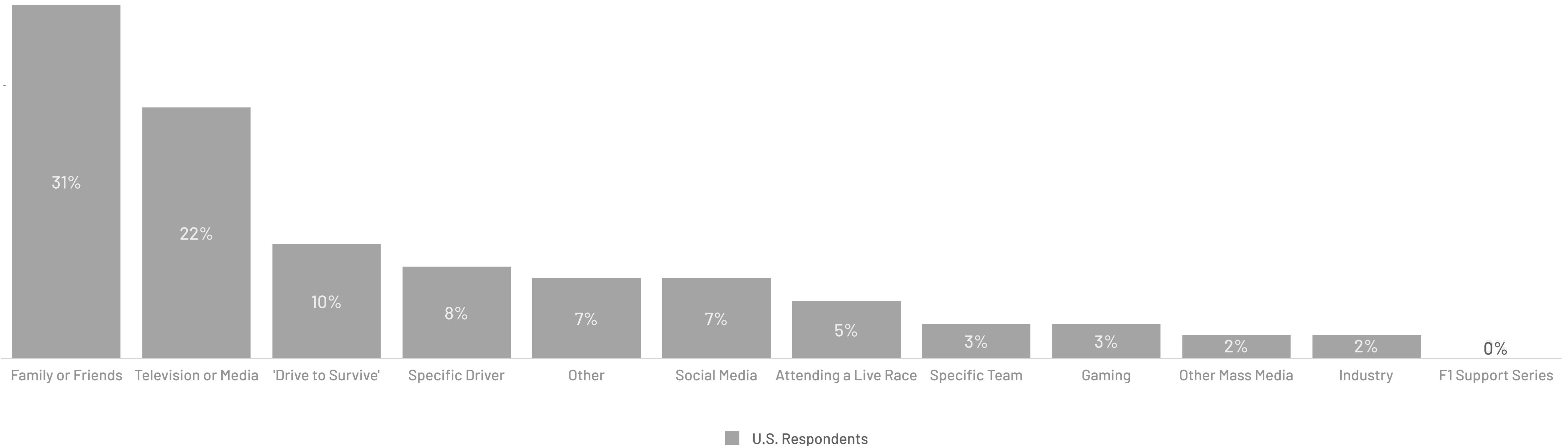
– Underscores the power of storytelling and personalities in U.S. F1 growth



U.S. Spotlight 

First Point of Interest (U.S.)

While media like 'Drive to Survive' has impact, the US respondents show that friends and family play the biggest role in sparking new F1 fandom.

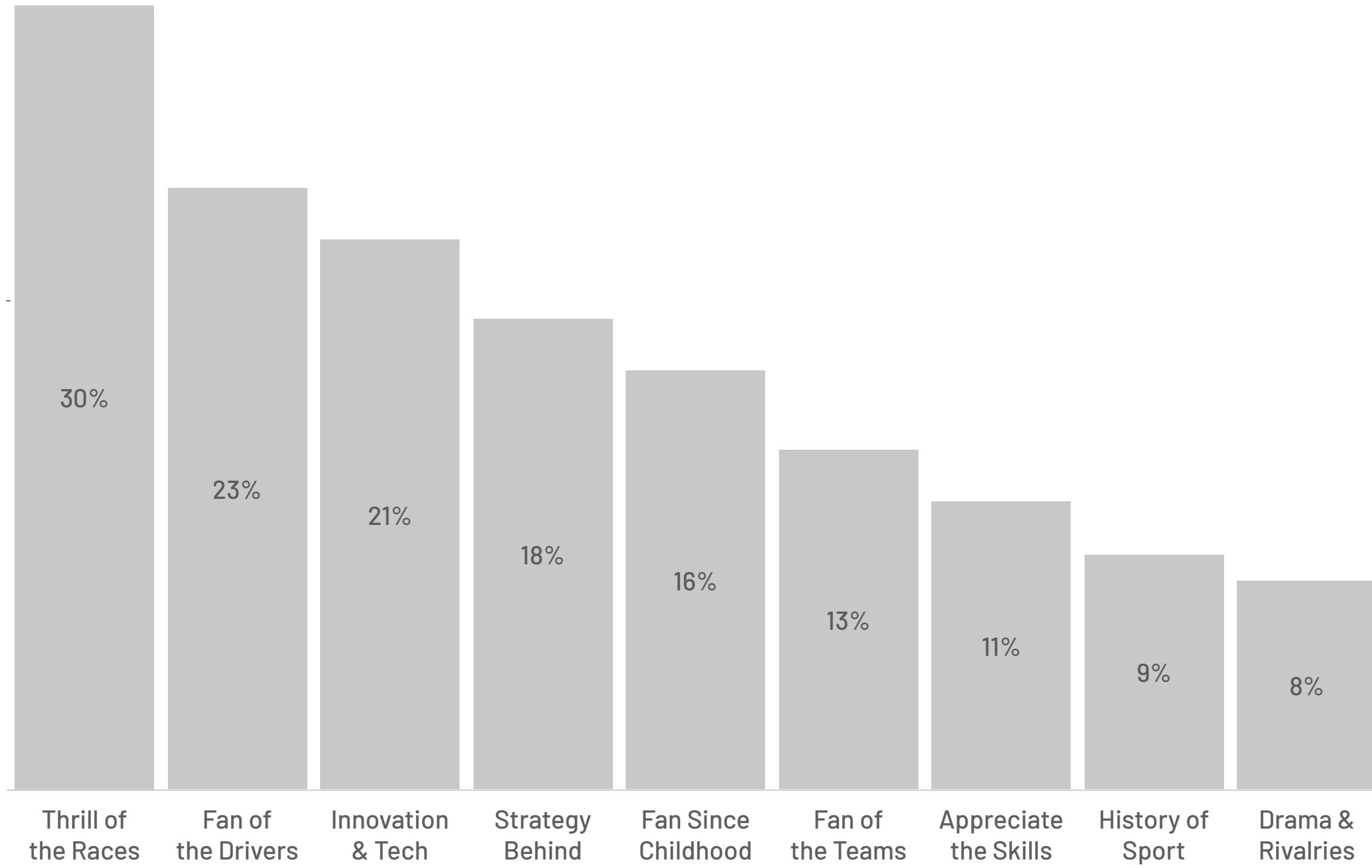


How did you first become interested in Formula 1?

U.S. Spotlight

Reasons to Follow

US fans follow F1 for the excitement and innovation, with long-time fans valuing their connection to the sport since childhood.

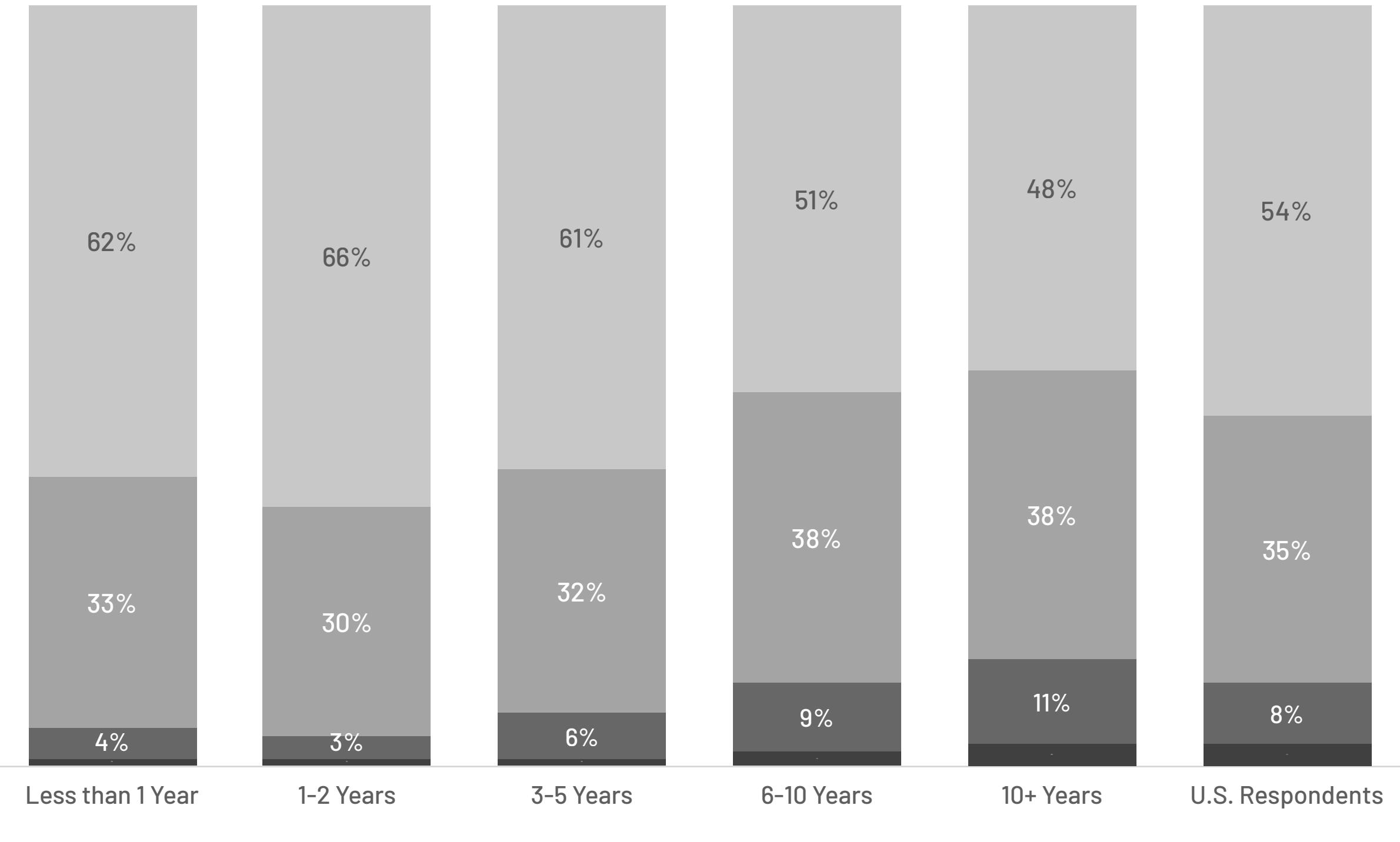


U.S. Respondents

Why do you follow Formula 1 today?

Emotional Investment

Longtime US fans remain steady followers, but newer fans show stronger emotional ties to the sport.



Very Invested

Somewhat Invested

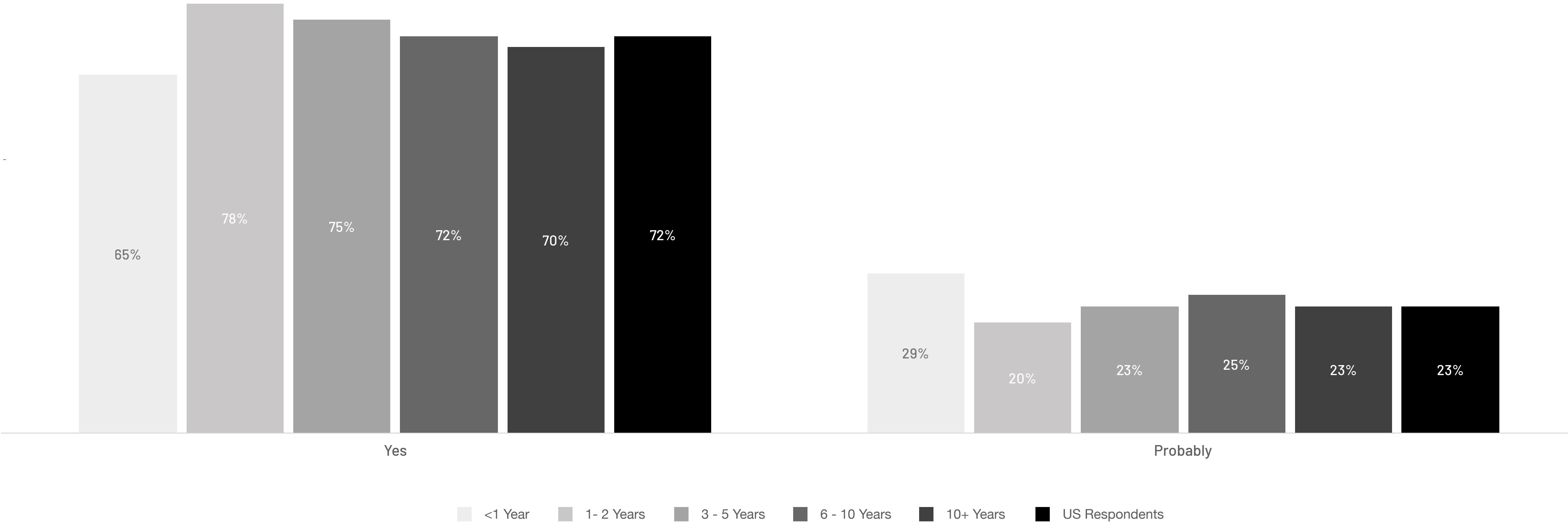
Slightly Invested

Not Invested

How emotionally invested are you in the outcome of Formula 1 races?

Intent to Follow in 5 Years

Whether new to the sport or long-time followers, most US F1 fans show strong intent to stay fans for the long term.

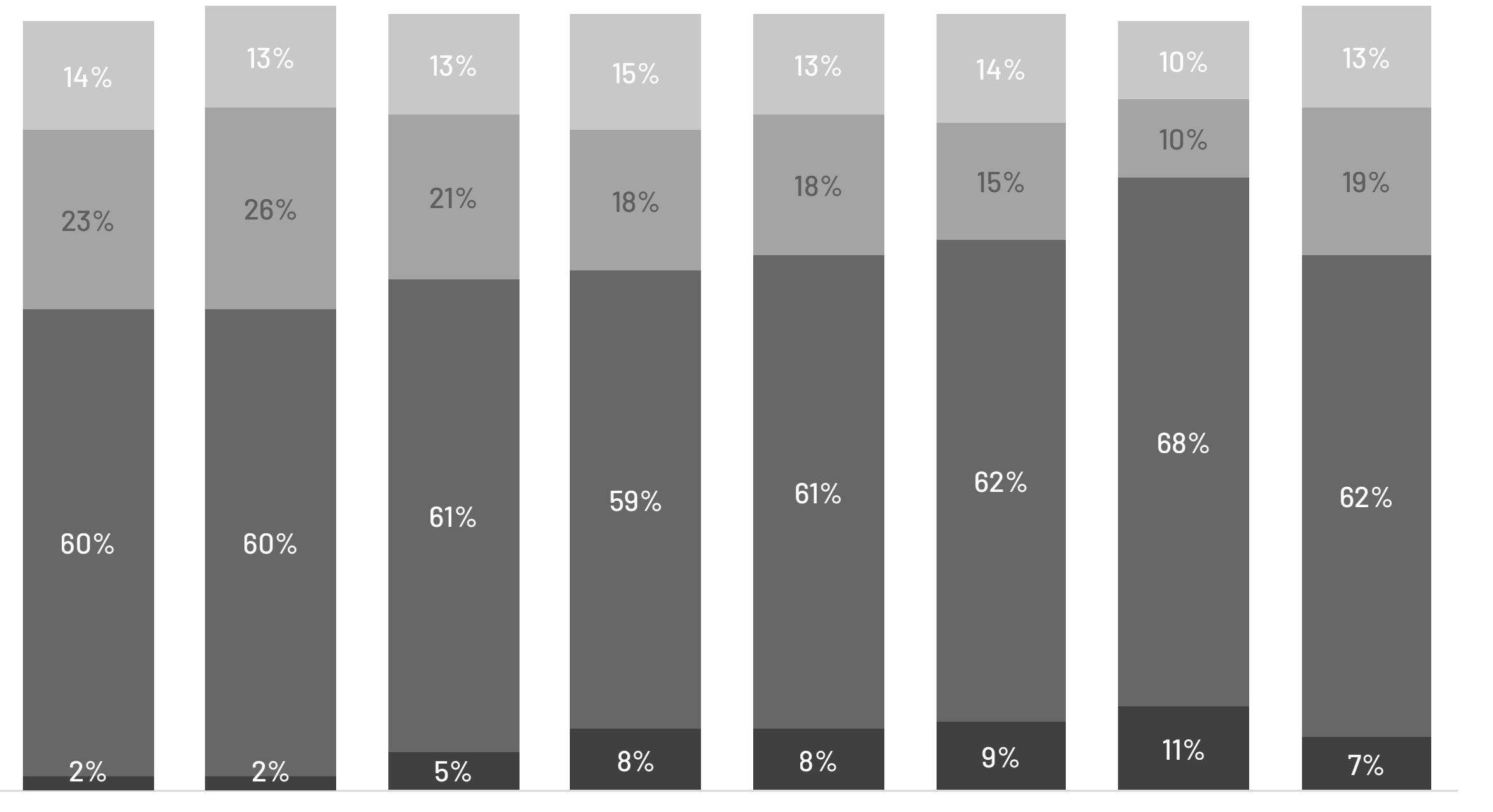


Do you see yourself following Formula 1 in 5 years?

U.S. Spotlight

Level of Support

Most US fans support multiple drivers and teams, but younger fans are much more likely to stick to a single favorite.



Loyal to One Team

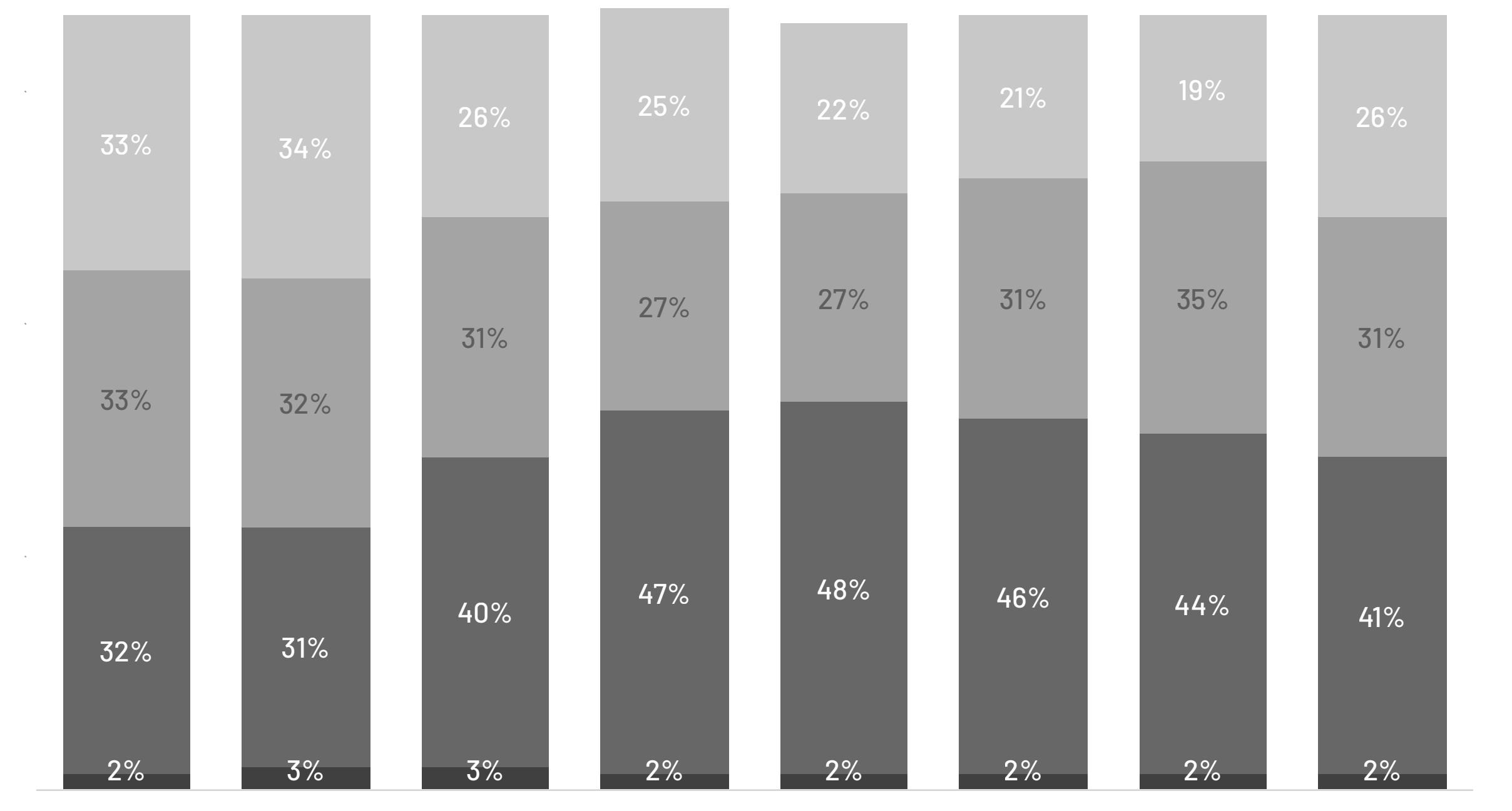
Loyal to One Driver

Support Multiple Teams/Drivers

Impartial to Teams/Drivers

Interest in Local Driver

Younger US fans are much more influenced by local drivers, while most older fans say it has little impact on their interest.



Yes, significantly

Yes, somewhat

No, wouldn't make a difference

Unsure

Which of the following statements best describes you in relation to your support of F1?

Do you think having a driver from your country in F1 does/would increase your interest in the sport?

U.S. Spotlight 

Content Powers Connection.

In the United States, fandom isn't just following the race—it's following the story. US surveyed fans are helping redefine what content engagement looks like for Formula 1, blending race-day rituals with a constant stream of personality-driven, platform-native interactions.

The U.S. audience is shaping the future of F1's content ecosystem. With high digital fluency, appetite for driver-led stories, and cross-platform consumption habits, American fans are showing how the sport can stretch beyond race weekends—and build a fandom that's emotional, habitual, and always on. Storytelling and personality matter: American fans are significantly more likely to cite "personalities, social media, and cultural relevance" as reasons for following the sport.

Content isn't just influencing behavior—it's driving transactions. The U.S. ranks among the top merch-buying markets, with 37% of surveyed fans reporting a recent purchase. Women and newer fans—those most engaged on social platforms—over-index on merchandise intent.

U.S. Spotlight 

Content Powers Connection.

The U.S. audience is shaping the future of F1's content ecosystem. With high digital fluency, appetite for driver-led stories, and cross-platform consumption habits, American fans are showing how the sport can stretch beyond race weekends—and build a fandom that's emotional, habitual, and always on. Storytelling and personality matter: American fans are significantly more likely to cite "personalities, social media, and cultural relevance" as reasons for following the sport.

High consumption frequency:

Leaning into community

Younger fans want to be part of the discussion.



55%

of fans age 18-24 discuss F1 in online communities

compared to

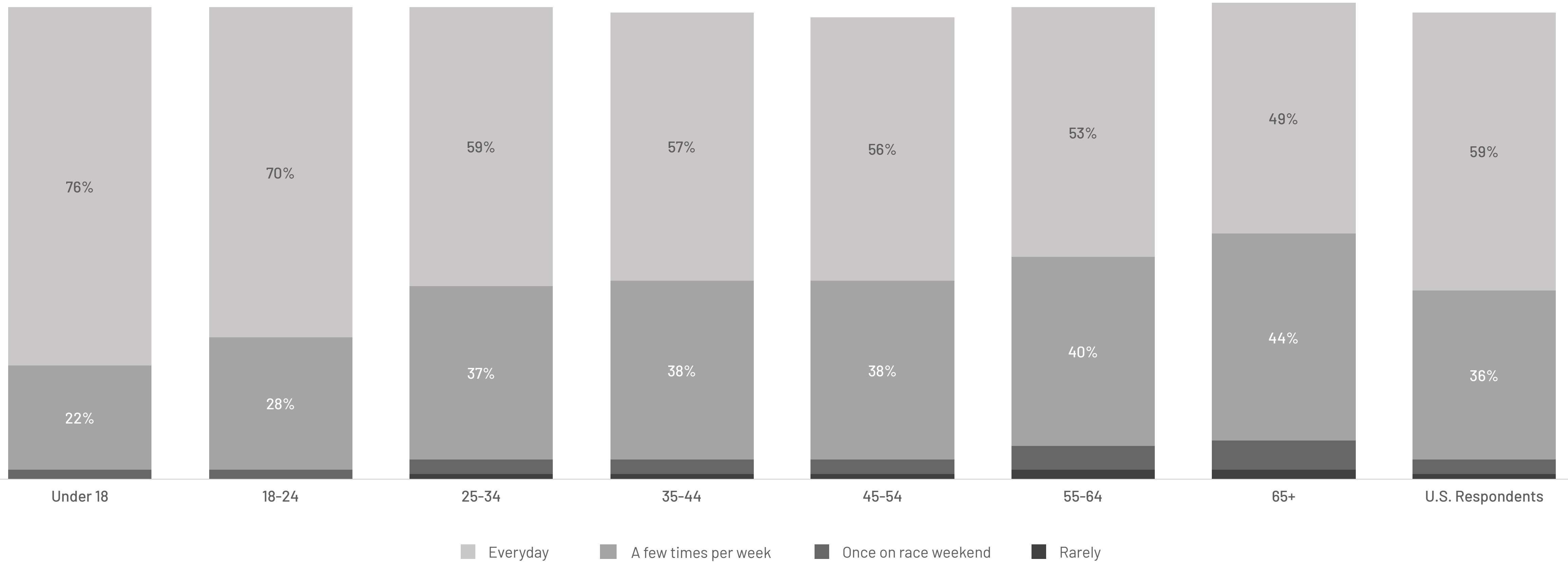
39%

of overall U.S. respondents.

U.S. Spotlight

News/Social Engagement

The majority of US fans engage with F1 content everyday, with younger consumers especially likely to make it part of their daily routine.



How often do you keep up with Formula 1 news, social media, and other content outside of race weekends?

U.S. Spotlight 

Content Powers Connection.

Across a number of channels:

73%

of U.S. respondents watch 20+ races per season—just below Europe (76%) and ahead of Asia-Pacific (66%)

75%

engage with F1 content via social media.

43%

of U.S. respondents consume F1 via YouTube or Twitch.

31%

listen to F1 podcasts—well above the global average.

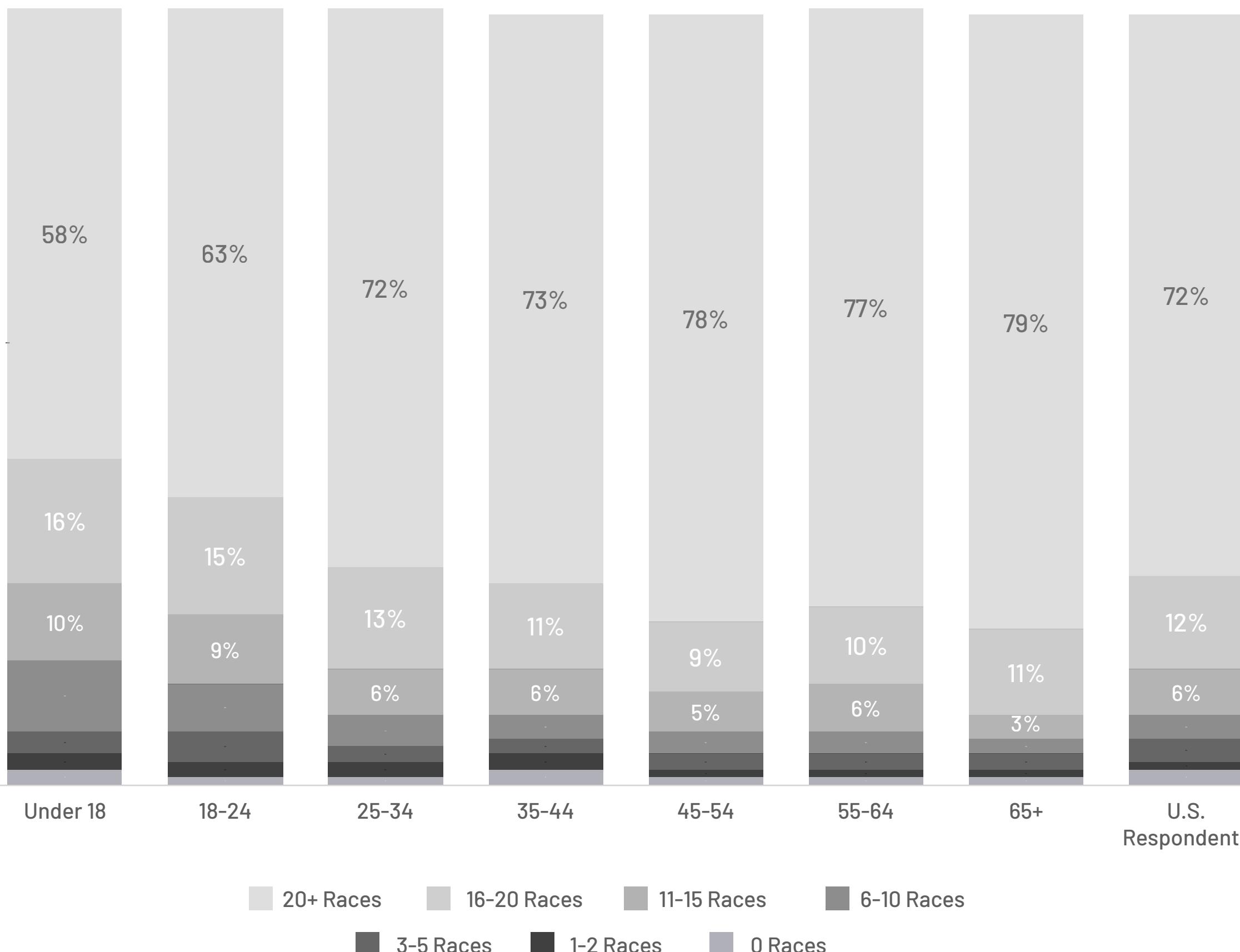
70%

of 18-24 surveyed engage with content daily.

U.S. Spotlight 

Races Watched

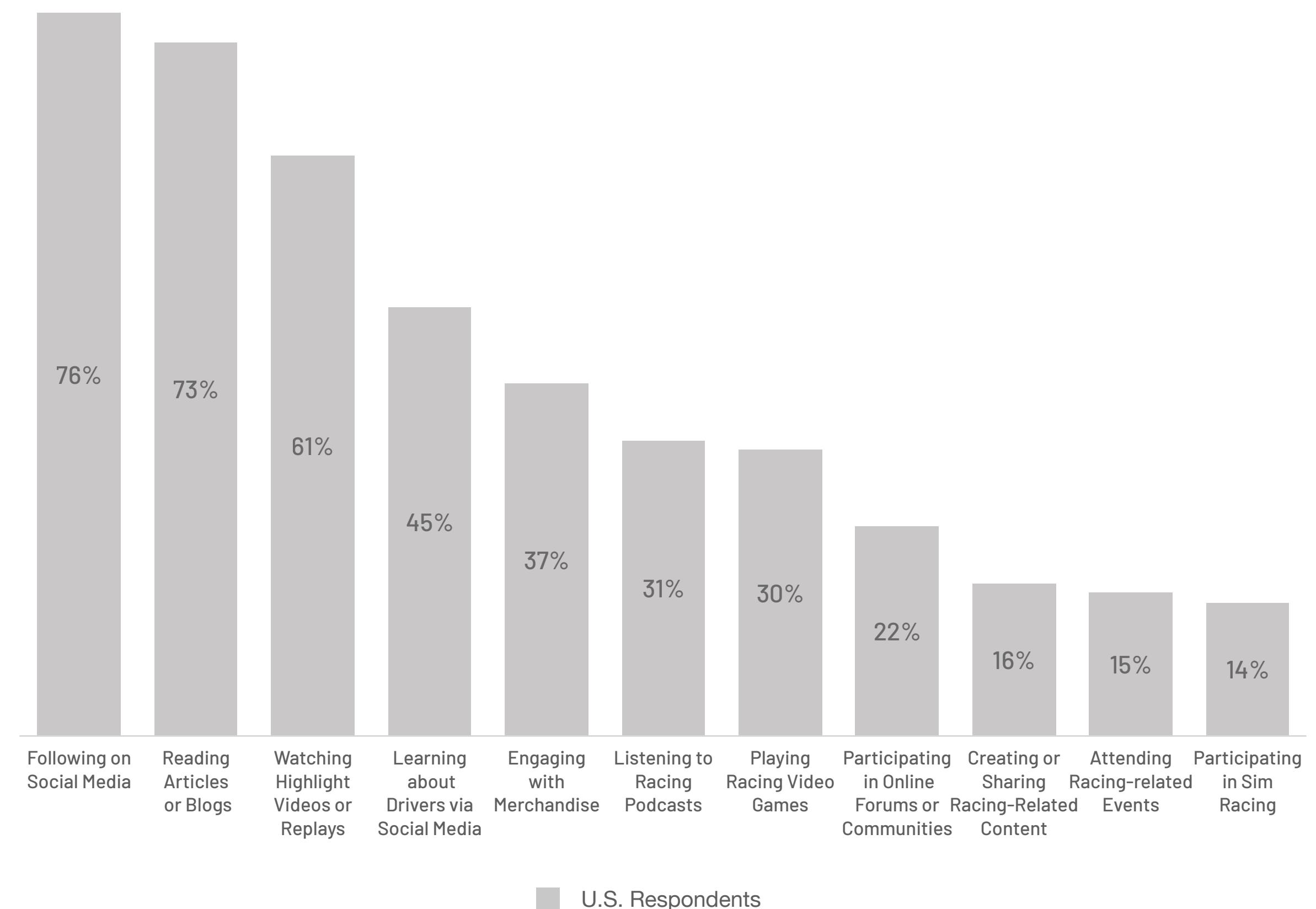
US fans are highly dedicated to watching races, with most viewing 20 or more each season, especially among older audiences.



With around 24 races each season, how many Formula 1 Grand Prix races are you likely to watch live or delayed on TV or via livestream in an average season?

Engagement Type

US fans prefer passive content they can easily fit into their routines rather than more active or in-depth formats like forums or podcasts.

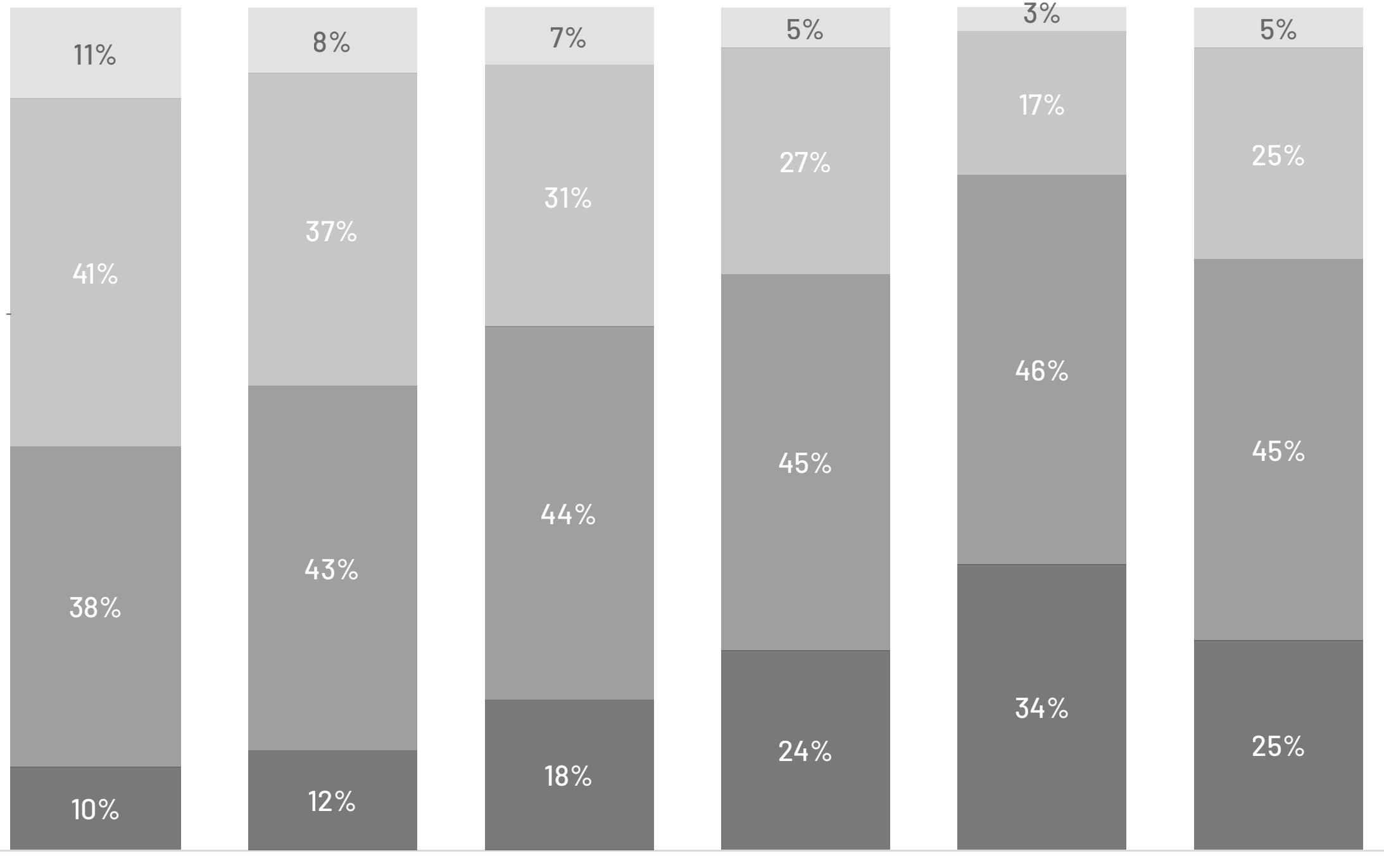


Which of the following activities do you engage in to connect with racing content outside of watching live events?

U.S. Spotlight 

Lifestyle Importance

While glamor and lifestyle are important to new US F1 fans, overall interest stays limited, as longtime fans make up most of the audience.

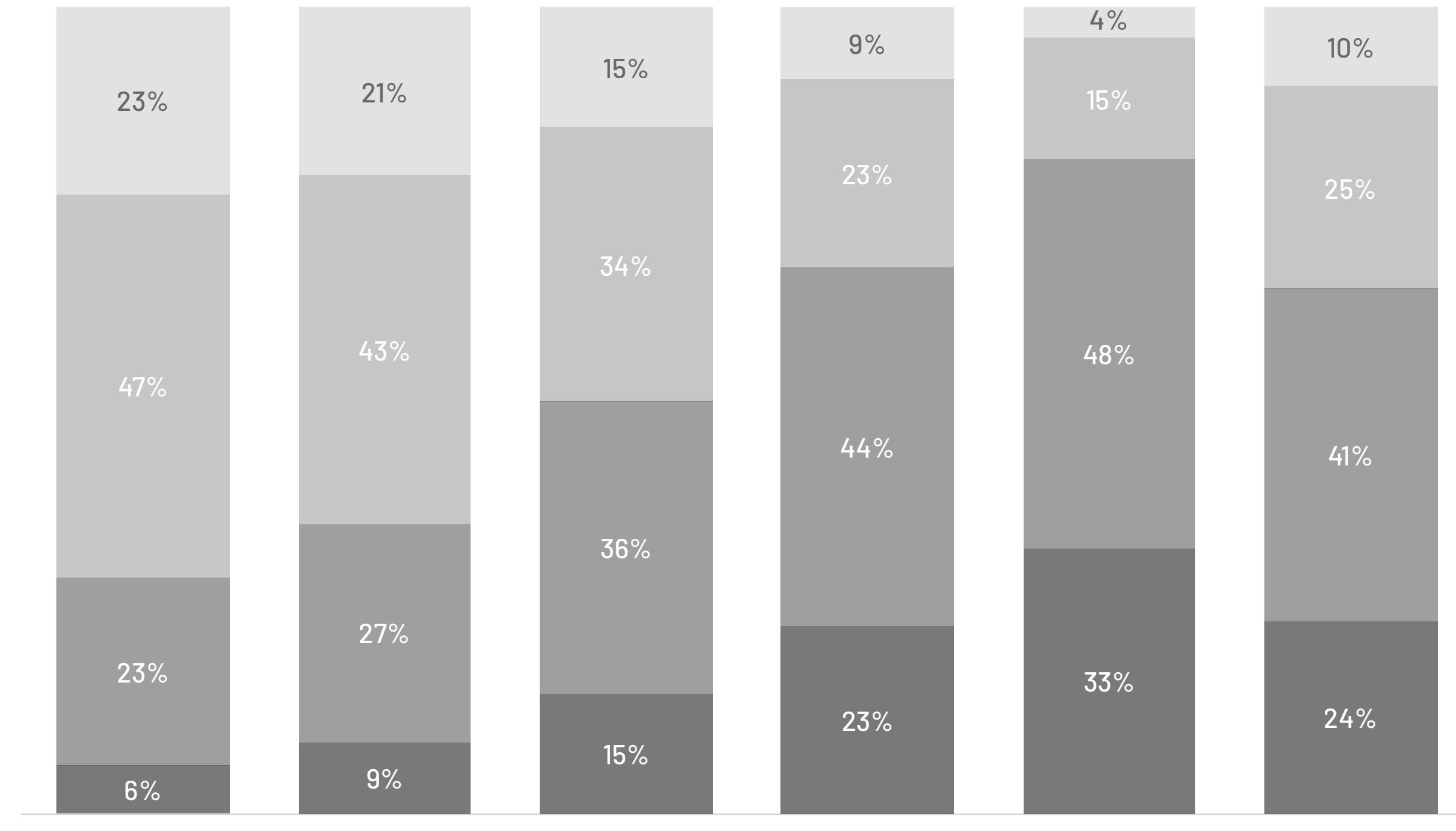


Very Important Somewhat Important Not Important No Importance

How important is the lifestyle aspect (glamour, luxury, celebrity presence) to your enjoyment of Formula 1?

Importance of Fashion/Style

Fashion and style are bigger draws for new US F1 fans, but interest drops the longer someone has followed the sport.



Very Important Somewhat Important Not Important Do Not Care

How important are fashion and style to your perception of Formula 1?

U.S. Spotlight 

Content Powers Connection.

Visual / community / interactive based consumption is important:

43%

of U.S. respondents regularly rely on YouTube and Twitch for their F1 content,

that number grows to more than half

56%

among Gen Z

65%

of U.S. respondents say social media is very/ somewhat important,

it's integral for younger audiences with

94%

of those age 18-24 seeing it as important and

68%

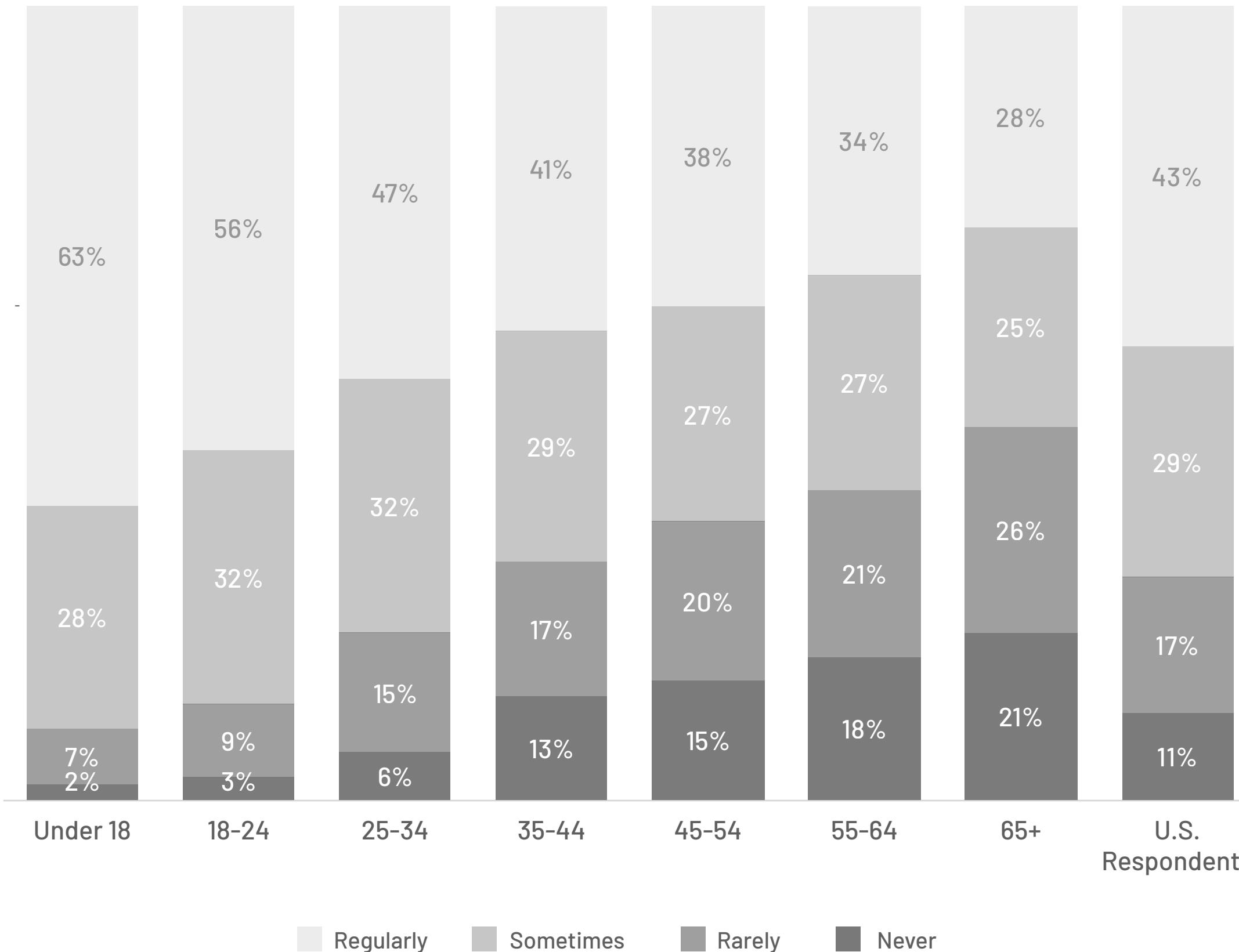
see it as very important.

For these fans, Instagram and YouTube are more than platforms—they're primary access points to F1's culture.

U.S. Spotlight 

YouTube & Twitch Usage

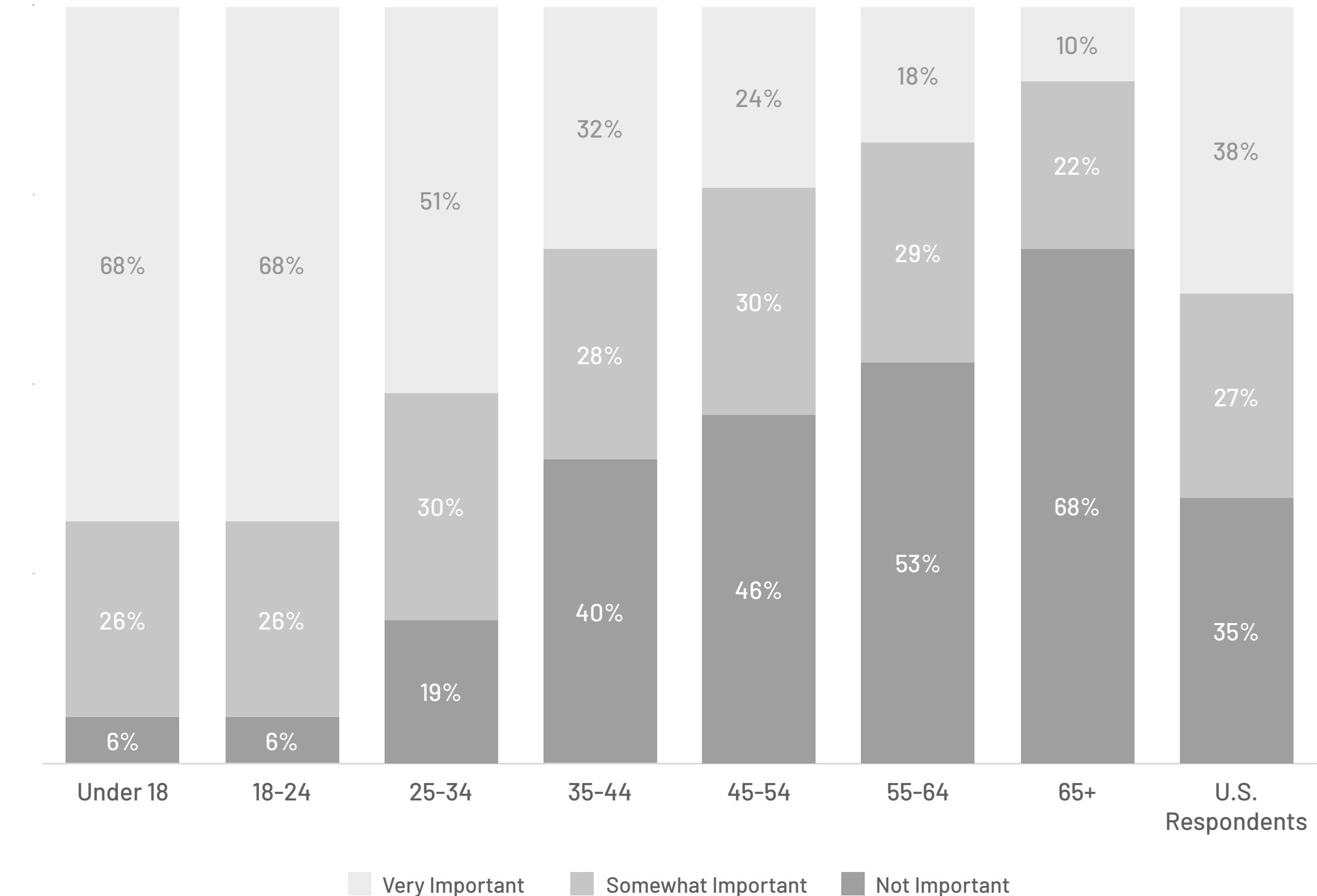
US fans regularly rely on YouTube and Twitch for their F1 content, with younger audiences more likely to regularly consume content on these platforms.



How often do you consume content about Formula 1 on platforms like YouTube or Twitch?

Importance of Social Media

US fans are split on the importance of social media to their F1 fandom, with older generations not seeing it as essential and younger generations viewing it as a key part of their connection to the sport.



How important is social media (e.g. X, Instagram, TikTok, etc.) in your connection to Formula 1?

Content Powers Connection.

Multi-Format Behavior
is the Norm:

U.S. fans are more likely than
their global peers to consume F1
in multiple formats:

**Social for
discovery and
community.**

**Video and
streaming for
access and
highlights.**

**Podcasts and
blogs for
context and
depth.**

U.S. Spotlight 

Fan demand for F1 live experiences is at an all-time high.

Fan interest in attending live F1 events is surging in the United States—with strong alignment between digital engagement and in-person demand. While the U.S. still lags some legacy markets in overall attendance, the growth signals are clear. Two-thirds (66%) of U.S. respondents feel that having a race hosted in the U.S. positively impacts their interest in the sport.

U.S. Spotlight

Live Attendance:**41%**

of U.S. respondents report having attended a Grand Prix—nearly one-third of them at a U.S.-based race. While higher than general estimates, this aligns with the engaged nature of the survey cohort and reflects the sport's growing domestic footprint.

Intent to Attend:**73%**

of surveyed U.S. fans plan to attend a U.S. race in the future.

Among Gen Z fans (16-24):

13%

Have attended

87%

Plan to attend

indicating a strong pipeline for future attendance growth.

Interest is evenly distributed across gender:

85%

Women

85%

Men

— expressing intent to attend in the future.

Off-Track Engagement:**47%**

of U.S. respondents say they are interested in attending non-race F1 events such as meetups, watch parties, or F1 Arcade experiences—underscoring demand for year-round, lifestyle-led engagement.

Geographic Access:

With three Grand Prix events in the U.S. ([Austin](#),

[Miami](#), [Las Vegas](#)),

access has expanded dramatically. The time zone-friendly scheduling and variety of host cities has helped deepen fan connection across coasts and demographics.

Strategic Signals:**75%**

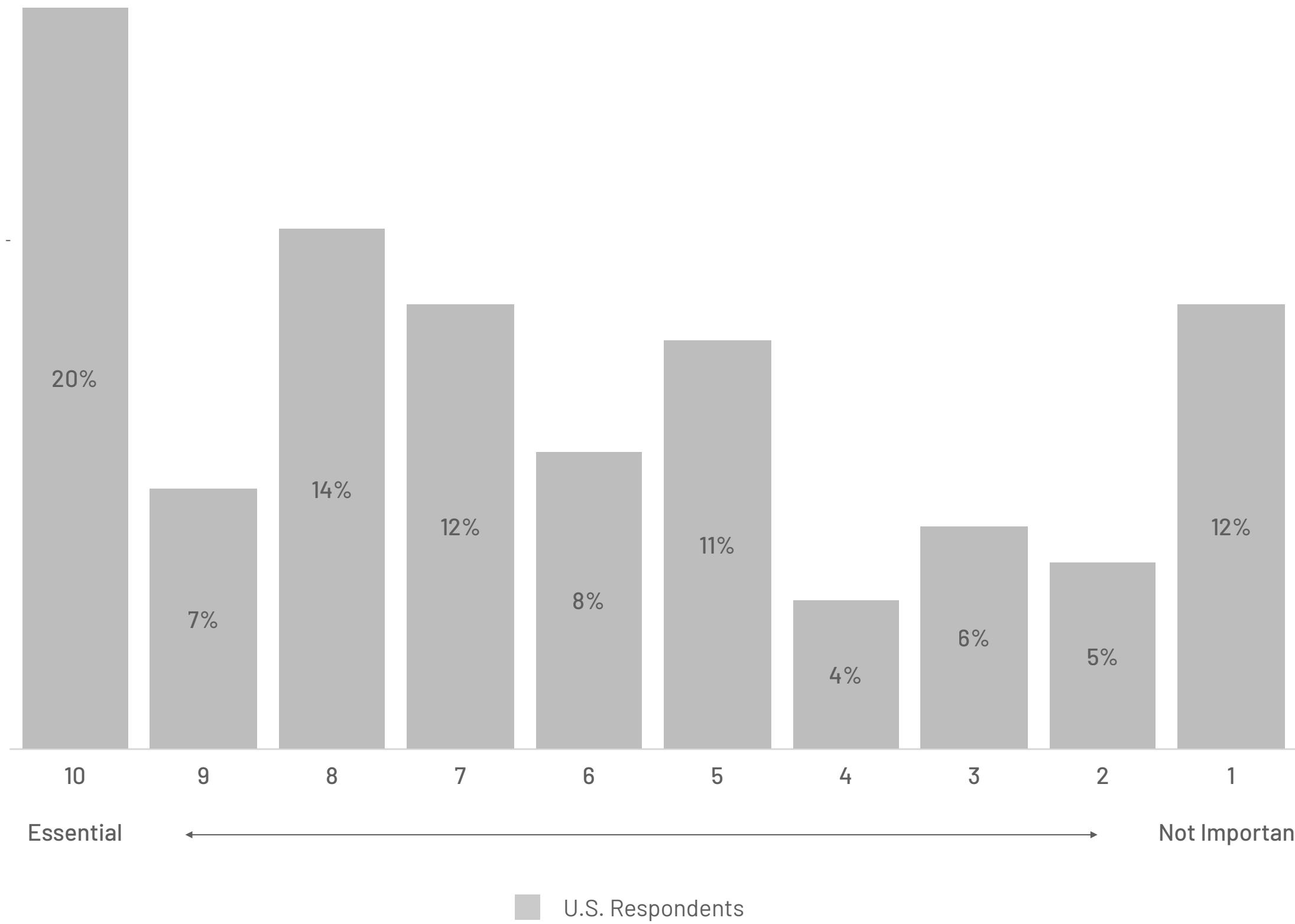
of U.S. fans say they are highly digitally engaged—consuming F1 via social media and many entering through online channels. This digital affinity appears to translate into strong real-world intent.

The combination of growing attendance, high interest in non-race experiences, and an expanding race calendar positions the U.S. as a critical market for F1's live strategy moving forward.

U.S. Spotlight 

Importance of Live Events

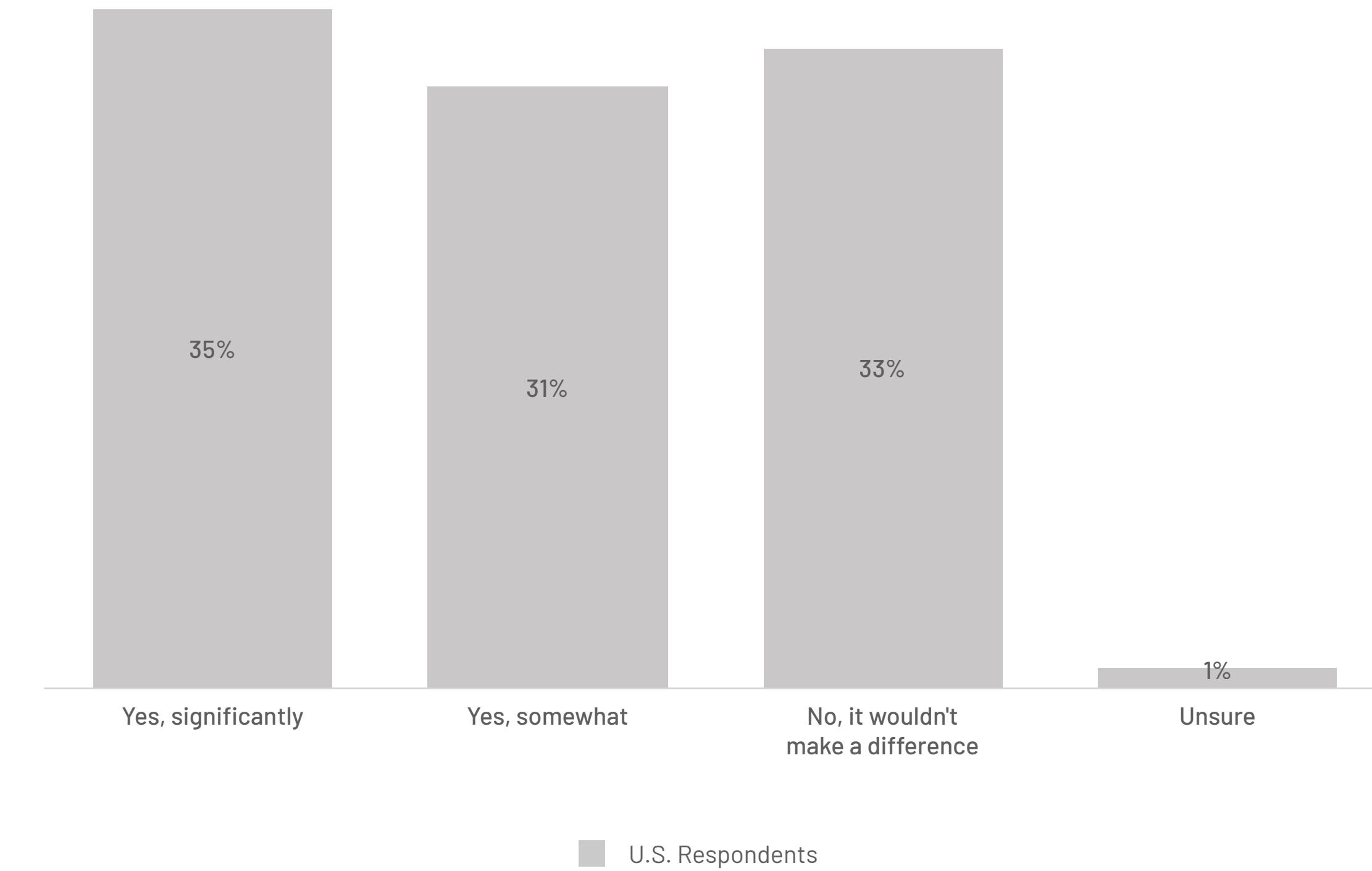
Most U.S. fans find live F1 races important, though only 20% see them as essential and many stay engaged without them.



On a scale of 1-10, how important is attending a live Formula 1 race to your fandom experience?

Local F1 Race Interest

A significant majority of US respondents feel that having a race hosted in the US positively impacts their interest in the sport.



Do you think having a F1 race in your country does/would increase your interest in the sport?

U.S. Spotlight 

Cross-Sport Landscape.

Among U.S. respondents, there is fandom in other racing leagues. However for a large share of respondents, especially new fans, F1 is now their favorite sport.

65%

Two-thirds of U.S. respondents find F1 more exciting than other motorsports, such as NASCAR or IndyCar.

New fans feel stronger about this with:

76%

of those following 2 years or less saying that F1 is more exciting.

#2

In addition to F1, other motor racing ranks #2 for other sports they regularly follow, followed by American Football.

**F1 is the clear favorite – why?
Because**

44%

find F1 more exciting than other sports they watch.

Thank you.

insights@motorsportnetwork.com

