

FIA/AMD FORMULA 1 SURVEY 2006

Survey Results



Overview of the Research

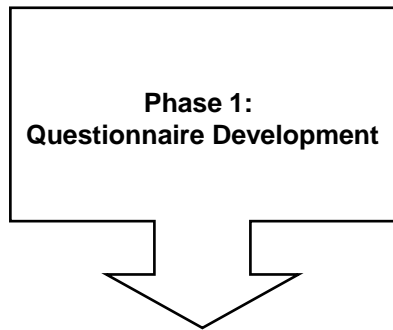


Overview of the Research

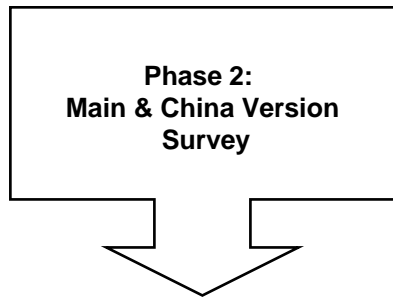
Introduction

- Following on from the success of the 2005 Global Fan Survey, the FIA and AMD – in association with F1 Racing Magazine – commissioned another survey among Formula One fans, with TNS Sport.
- As in 2005, the core aim of the study was to give Formula One's fans a voice in the sport and provide an independent and comprehensive representation of their attitudes across a range to topics affecting the sport.
- With this in mind, a rigorous, multi-faceted research programme was developed and implemented to address some of the most important questions facing the sport today, including: general perceptions, technology, the new qualifying format, press and TV coverage, new media uptake and the future direction of the sport.
- Conducted throughout June/July 2006, the research programme was completed in two core phases, including:
 - Phase 1: Questionnaire development (Main and China version surveys)
 - Phase 2: Quantitative Survey – Global online survey
- Over 90,000 surveys were completed by fans in 180 countries during Phase 2 of the research programme.
- The following report details the findings from the main survey and reveals that the sport remains healthy in the eyes of knowledgeable fans.

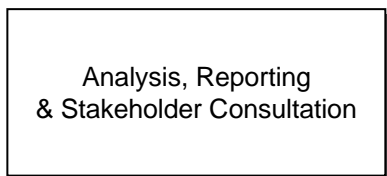
Overview of the Research Research Design



- TNS Sport in conjunction with the project stakeholders held a questionnaire workshop to map out the a number of issues facing F1 for exploration among fans.
- A draft survey was then created and designed by TNS Sport for approval.
- Once approved, the survey was then tested in an online mini-forum of F1 fans based in the UK.
 - N=12 F1 fans participated in a 1.5 hour online discussion group.
 - All fans had to have a interest in Formula 1.
- Recommendations based on the outcomes of the online forum where detailed and where relevant incorporated to optimise the final survey design.



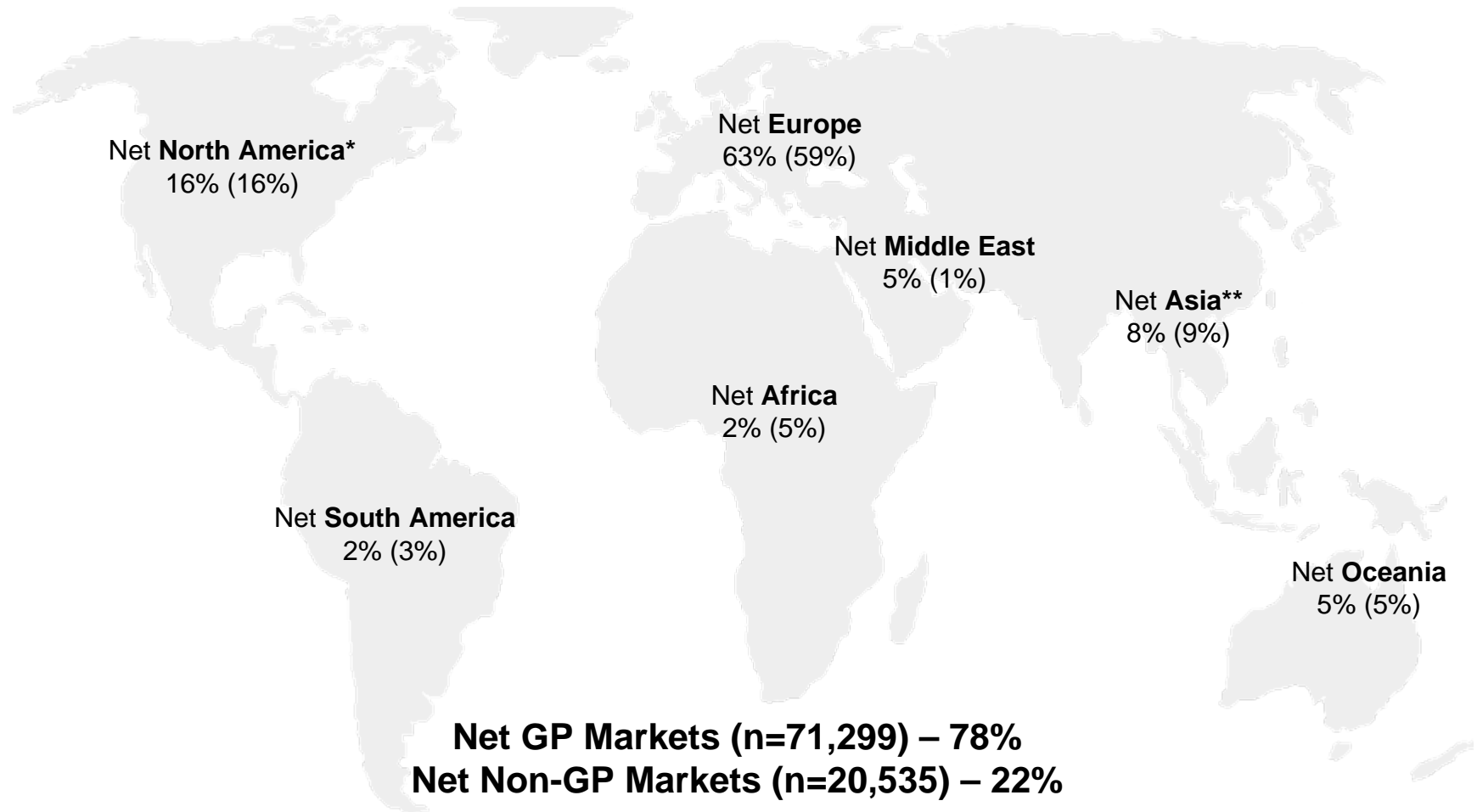
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- Following on from the survey development phase, the main survey was translated and then back-translated into 14 languages and then tested.
 - Given the significance of China as an emerging market for F1, a separate version of the survey was set up for the F1 fan community in that country.
 - Once approved, the site was launched, fans accessing the site through a number of websites including both motorsport related (including FIA.com) and in the B2B sector. Fieldwork was completed during May 2006
 - In total n=91,934 main surveys were completed globally with an additional n=343 surveys completed in China (full sample details are contained in the body of the report)



Who did we speak to?



Who did we speak to?



Q1: In which country do you currently live?

Base: N=91,834 (n=93,018)

2005 survey percentages shown in brackets

* North America inclusive of Caribbean and Central American regions ** Excluding China

Who did we speak to?

	TOTAL	Europe	Africa	North America	South America	Asia	Middle East	Oceania	Other
	%	%	%	%	%	%	%	%	%
	n= 91834	58068	1626	14446	1593	7194	4679	4223	5
Gender									
Male	91	90	90	95	95	90	90	94	80
Female	9	10	10	5	4	10	9	6	20
Age									
up to 16	2	2	-	-	1	1	3	1	-
16 - 24	22	23	14	10	22	29	42	22	-
25 - 34	31	31	39	23	36	40	39	33	60
35 - 44	23	23	24	29	24	22	11	22	40
45 - 54	13	13	14	22	12	6	3	13	-
55+	8	7	8	15	5	1	-	9	-
Occupation									
Senior Management	9	8	17	13	14	5	6	8	-
Middle management	11	11	18	12	10	9	8	13	60
Junior management/supervisor	6	6	7	5	7	7	4	5	-
Professional	12	10	11	18	22	8	13	14	-
Technical specialist	17	17	18	18	15	18	11	17	20
Clerical/Administrative	5	6	4	2	3	6	5	4	20
Skilled manual	6	8	2	5	1	4	2	7	-
Semi or unskilled manual	2	2	-	1	-	2	-	2	-
Looking after the home	1	1	1	-	-	1	-	1	-
Student	17	18	8	8	17	24	39	15	-
Self-employed	7	6	12	9	7	8	6	8	-
Unemployed/looking for work	2	2	1	1	2	1	2	1	-
Retired	3	3	1	5	1	-	-	2	-
Refused	3	3	1	1	1	6	3	1	-

Q37 and Q38: Are you?

Q39: Which of the following best describes your current main occupation?

Base: N=91,834

Engagement in Formula 1



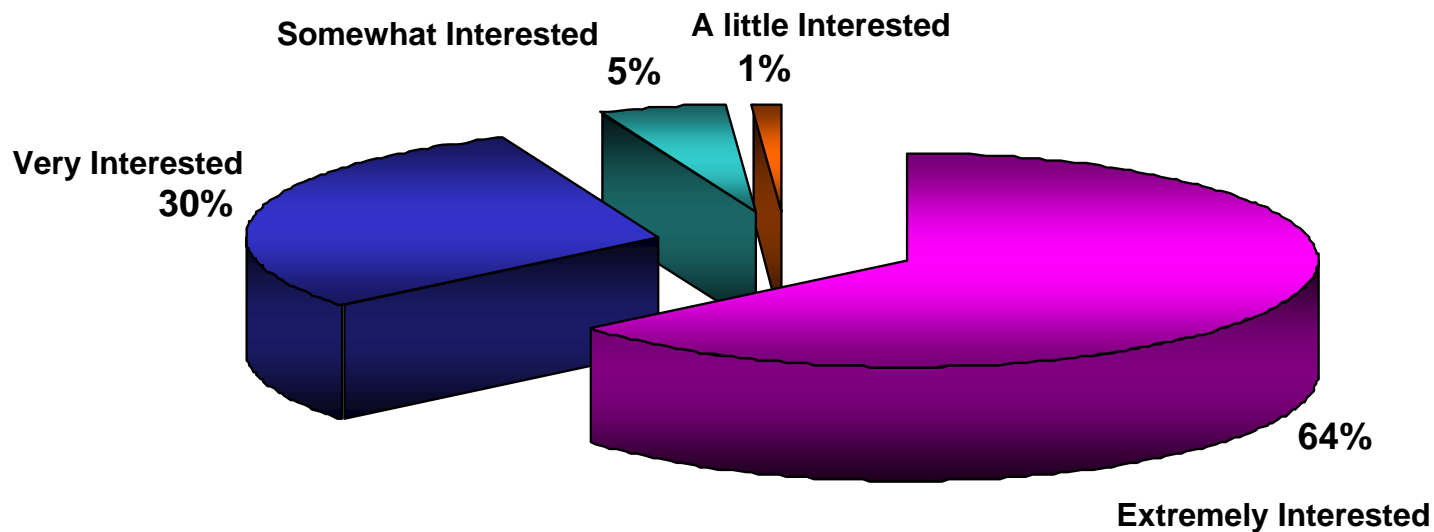
Engagement in F1

Summary Points

- Interest in F1 among fans remains strong, with 9 in 10 fans (94%) claiming that they are either extremely or very interested in the sport.
- F1 fans also have a strong preference for the sport with 56% of fans claiming that their preference for watching F1 in comparison to other sports is extremely strong.
- As in 2005, fans have had a long relationship with the sport, with just under two-thirds of fans (64%) claiming that they have actively followed the sport for more than 10 years.
- Over a third of fans will attend at least 1 race this season, 23% of these fans will attend more than 1 race during the season.
- For those not attending a race this season, TV consumption of the sport remains strong. More than three quarters of fans (77%) claim that they will watch all 18 races of season on TV and a further 14% will watch 15-17 races.
- Michael Schumacher was fans' favourite GP driver (28%) followed by Kimi Räikkönen (17%) and Jenson Button (8%). As expected, there is some parochial support among fans with fans from Oceania, Asia and South America claiming drivers from their regions as favourite. One in ten fans did not have a preferred driver.
- Ferrari was fans' favourite team (30%) followed by McLaren Mercedes (21%) and the Renault and Williams F1 teams (8% respectively).

Interest In F1

2 in 3 fans are extremely interested in F1



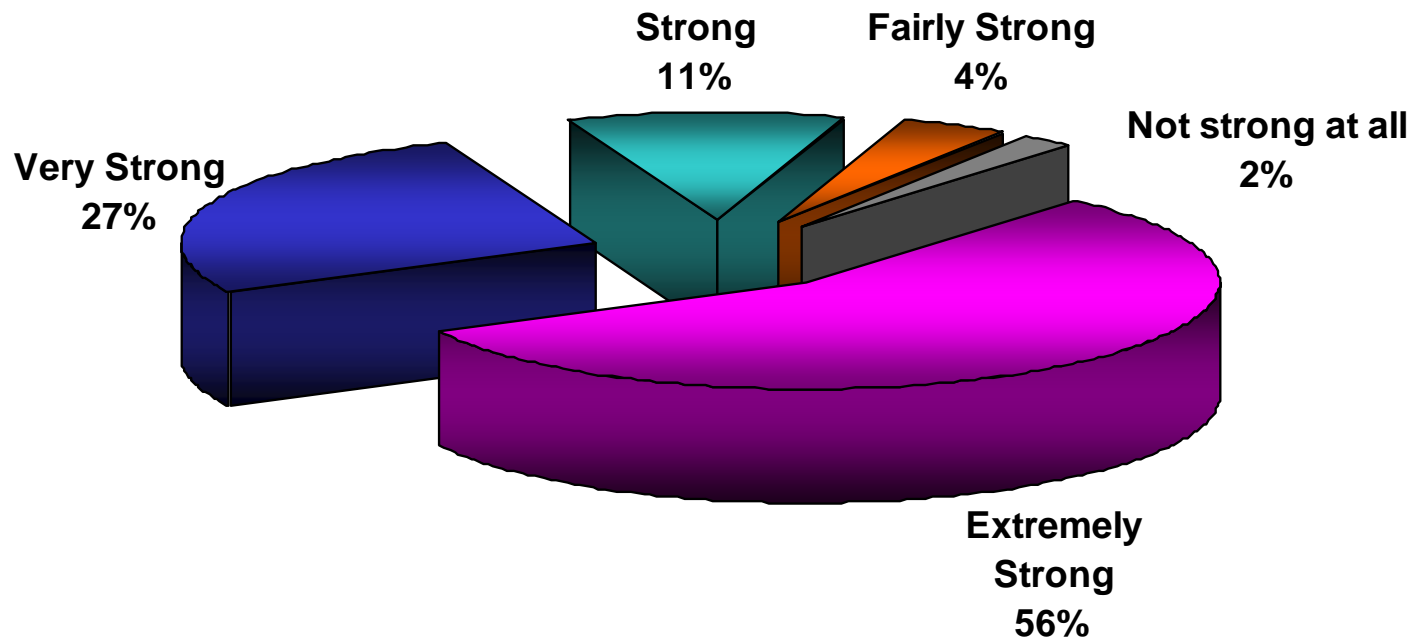
Interest in F1 remains strong among fans with just under two-thirds claiming that they are extremely interested in F1 (65% in 2005).

Q2: Overall, how would you describe your interest in F1? Would you say that you are ...

Base: N=91,834

Preference for F1

More than 1 in 2 fans have a strong preference for F1



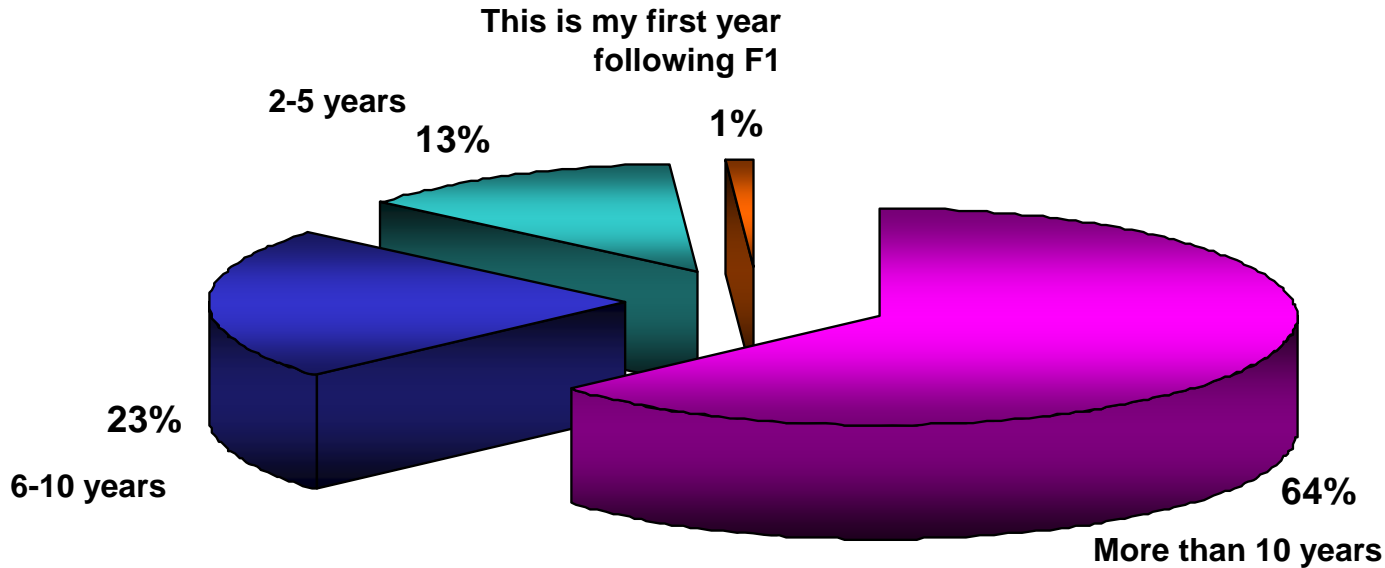
Compared to other sports, fans have a strong preference for the sport – i.e. it is a highly preferred part of their sport viewing repertoire.

Q3: Given what you know about other sports, how strong is your preference for watching Formula 1 instead of any other sport?

Base: N=91,834

Longevity

Fans have a well-established relationship with the sport



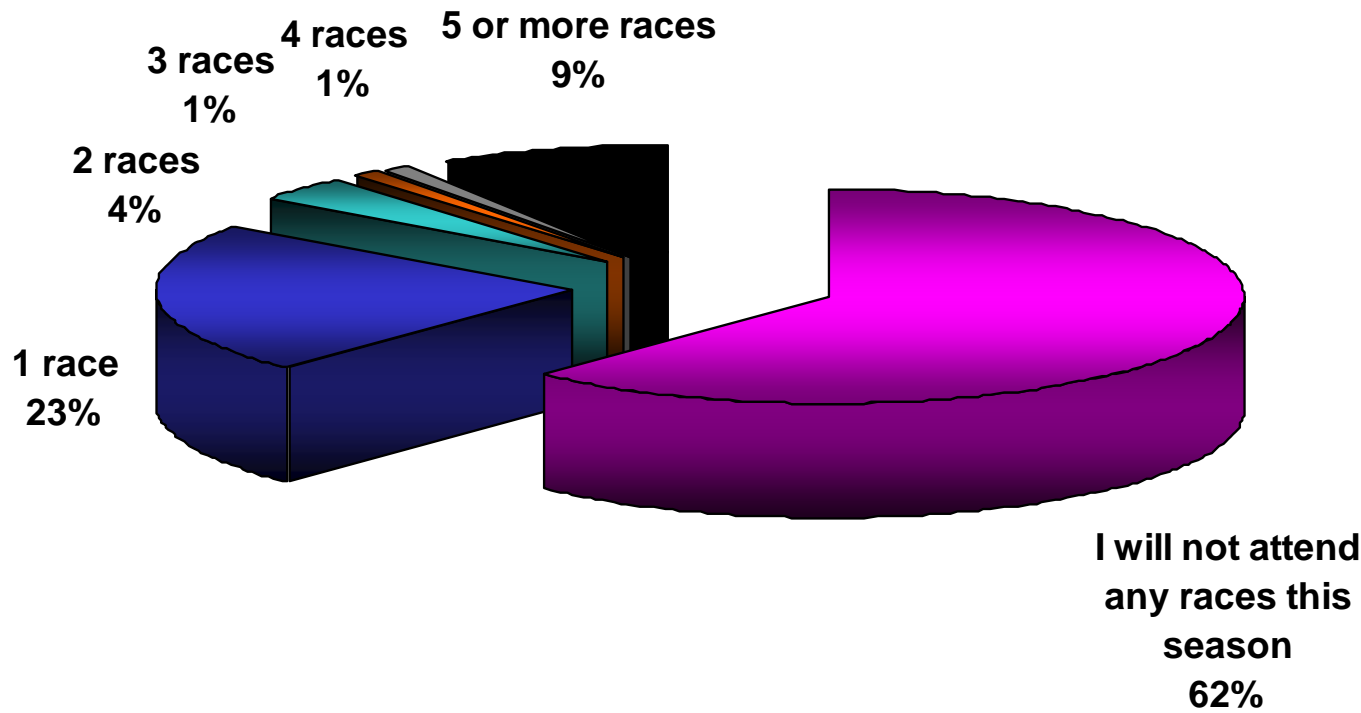
As in 2005, the F1 fan has a mature relationship with the sport – 8 in 10 fans having actively followed F1 for 6 years or more (85% in 2005).

Q3: For how many years have you actively followed F1? (By actively we mean if you have done one or more of the following regularly: watched races on TV, attended races, read specialist F1 publications or visited specialist F1 websites.)

Base: N=91,834

Intended Race Attendance

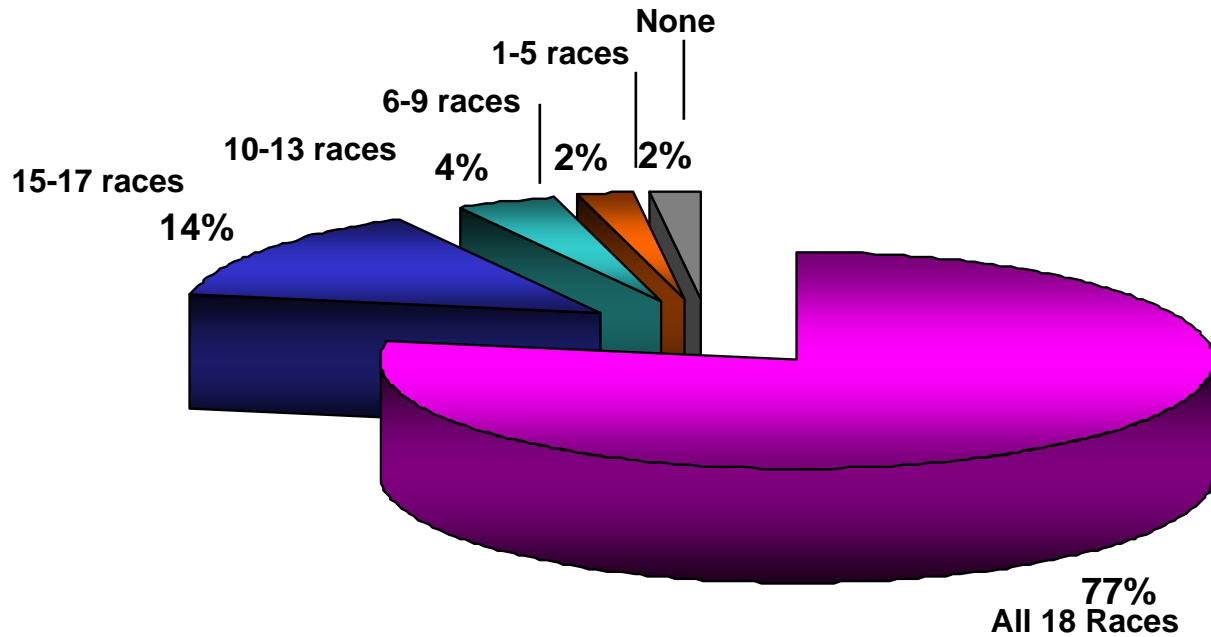
A third of fans claimed that they would attend a race this season



Q6: How many F1 races will you attend this season?
Base: N=91,834

Intended TV Viewing

TV consumption of the sport remains strong

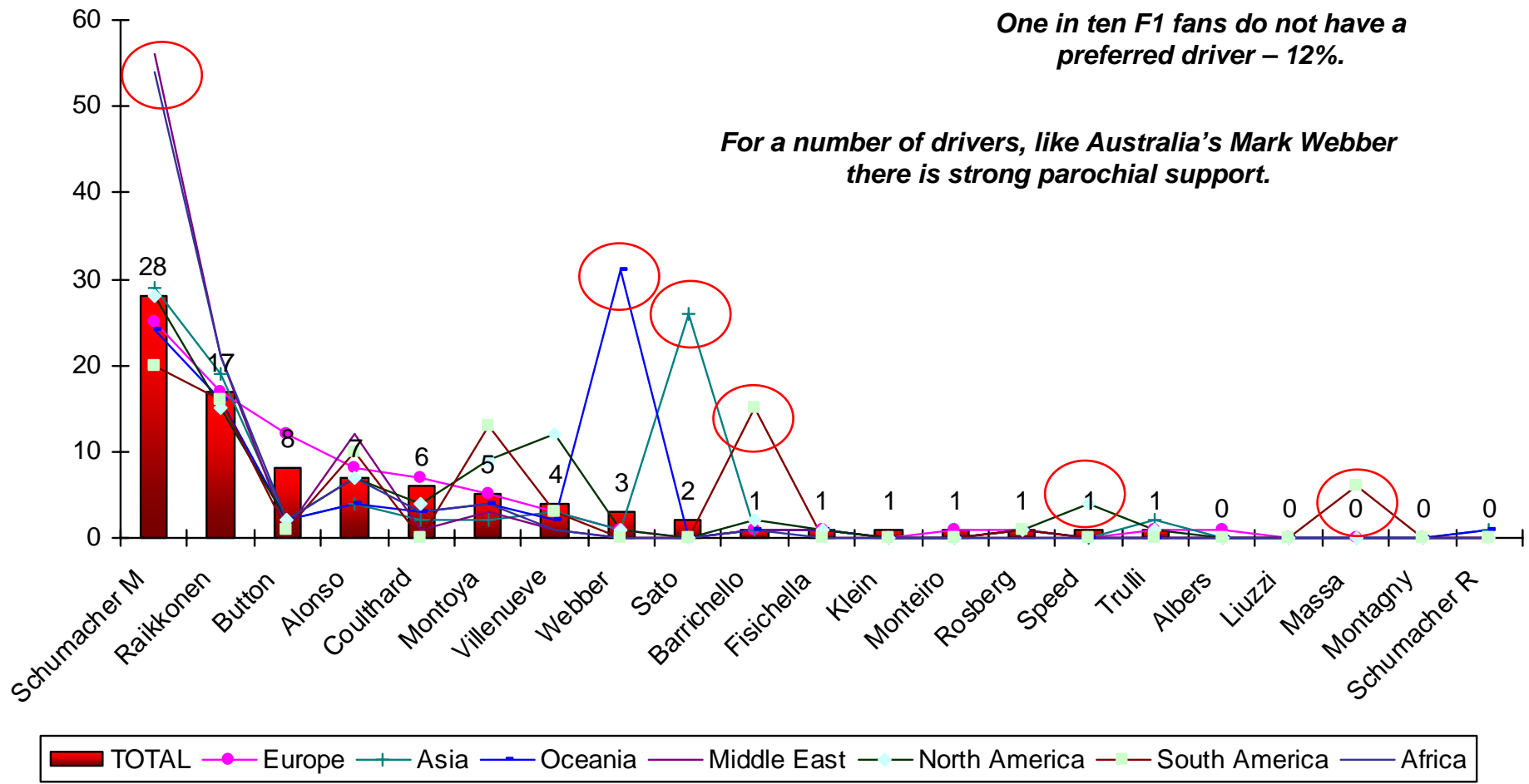


***9 in 10 fans will watch a majority of the season on TV –
91% 15 races or more.***

Q4: Other than the races that you attend, how many F1 races do you intend to watch on TV this season?
Base: N=91,834

Favourite Drivers

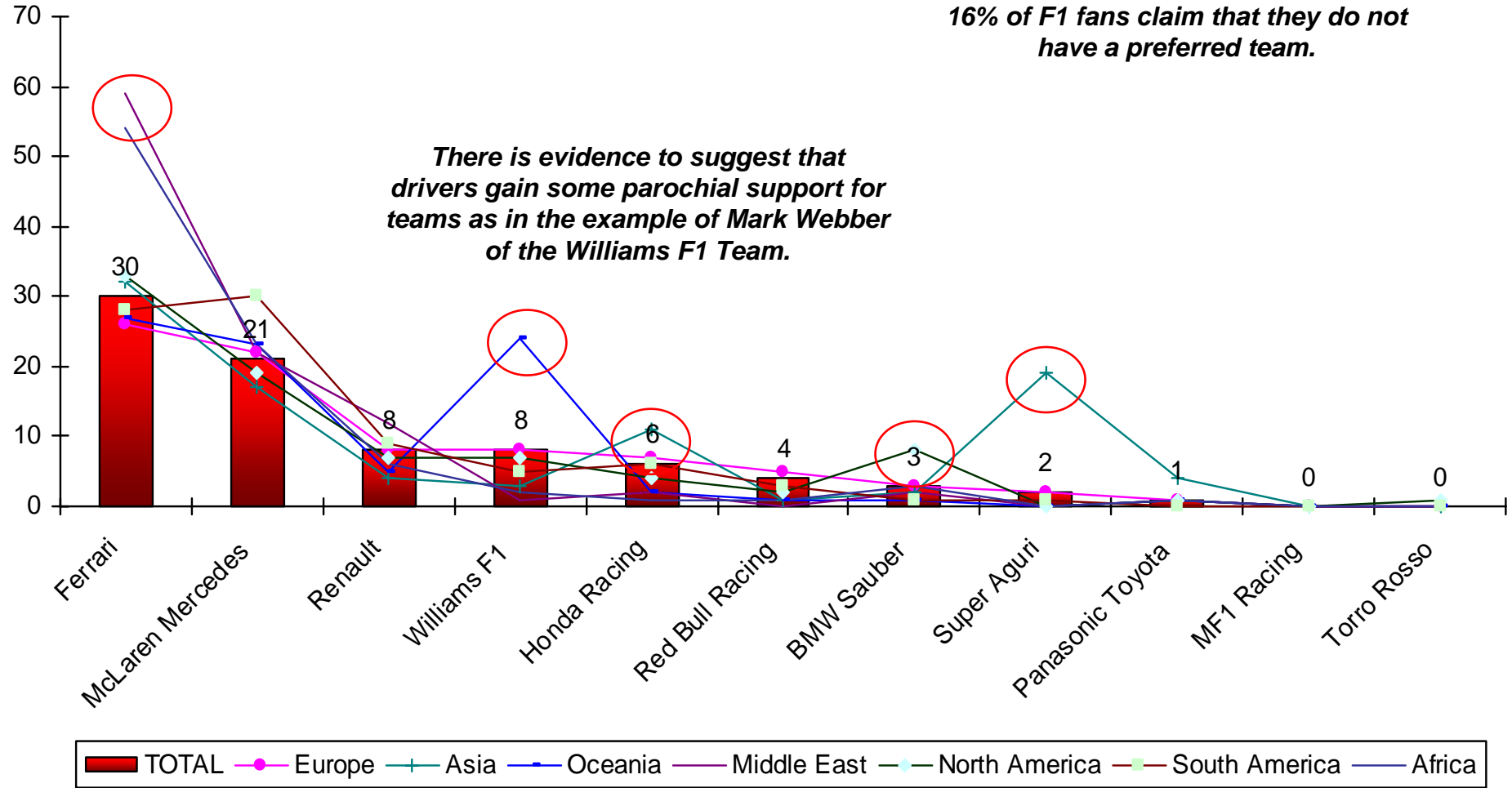
Michael Schumacher is fans' favourite driver



Q7: Who is your favourite driver?
Base: N=91,834

Favourite Teams

Ferrari is the fan's favourite team



Q7: Which is your favourite team?

Base: N=91,834

Attitudes and Perceptions toward F1



Attitudes and Perceptions toward F1

Summary Points

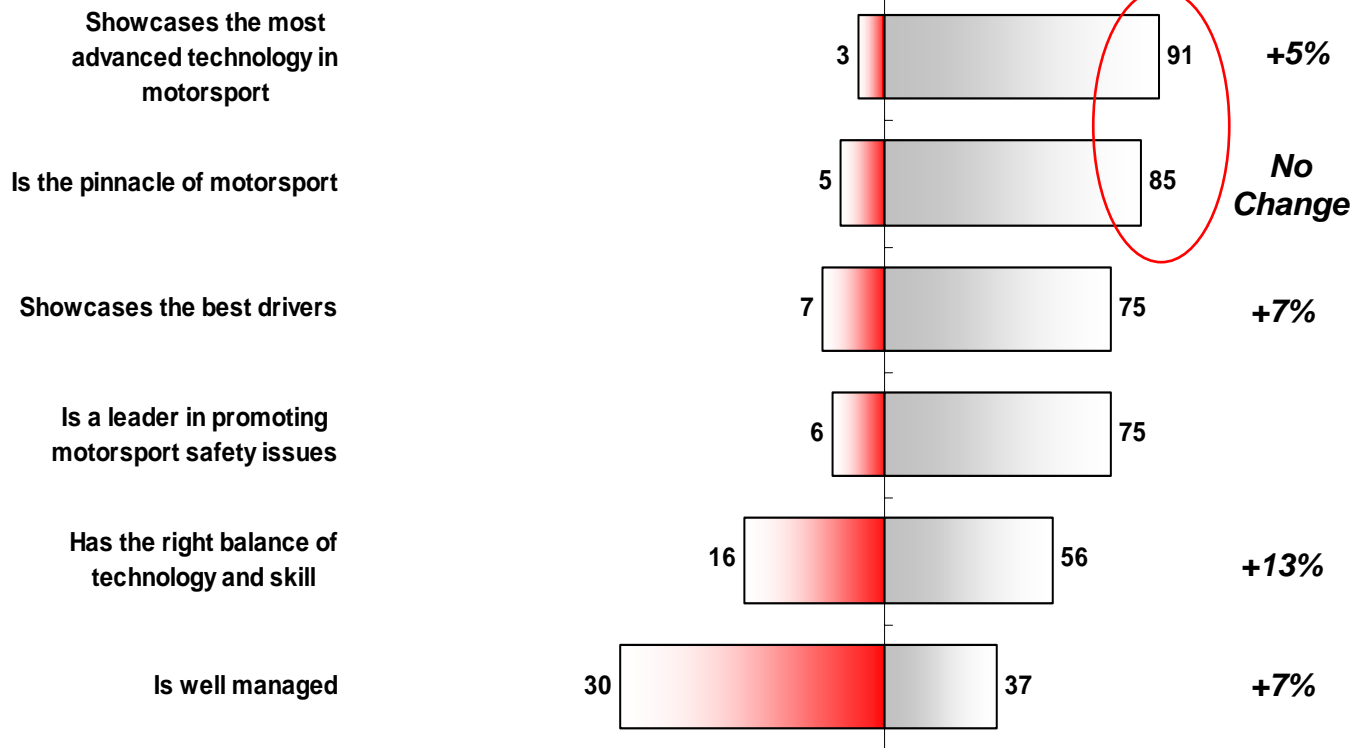
- Among more than 8 in 10 fans (85%), Formula One was still seen to be the pinnacle of motorsport. Significantly, it was also important to fans that F1 maintained this positioning in motorsport – 62% claiming that F1 is the sports pinnacle, was extremely important to them.
- The perception that F1 showcases the most advanced technology in the sport strengthened, with 91% agreeing with the statement – up from 86% in 2005.
- There was a positive shift in the perception that F1 has the right balance between technology and skill – 56% of fans agreeing with the statement, up from 43% in 2005.
- Overtaking and driver skill are those aspects the sport that are extremely important to fans
 - Overtaking in races – 86% extremely important
 - Emphasis on driver skill and less on other aids – 64%
- Importantly, given the role TV plays in fans' engagement with the sport it was also extremely important to fans that TV coverage made them feel as though they were at the race – 67%

General Perceptions

F1 is strongly perceived as the pinnacle of motor sport

Formula 1 ...

Net Disagree Net Agree

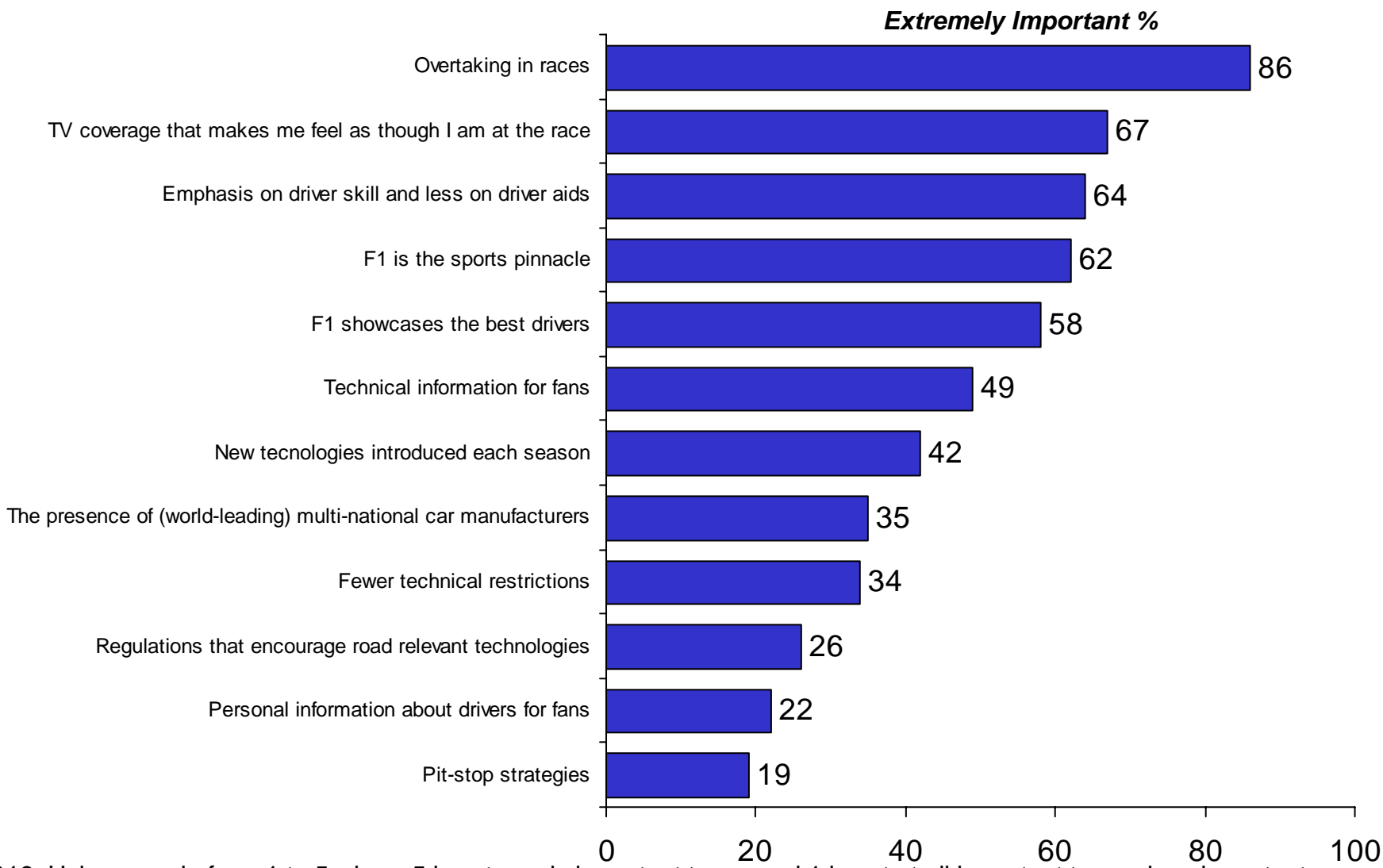


There has been a positive shift among fans in the perception that there is a greater balance between technology and skill in the sport.

Q7: How strongly do you agree or disagree with the following statements about F1?
Base: N=91,834

Importance Elements

Overtaking is extremely important for F1 fans



Q19: Using a scale from 1 to 5 where 5 is extremely important to me and 1 is not at all important to me, how important are each of the following features of F1 to you?

Base: N=91,834

New Media and Online Content Uptake



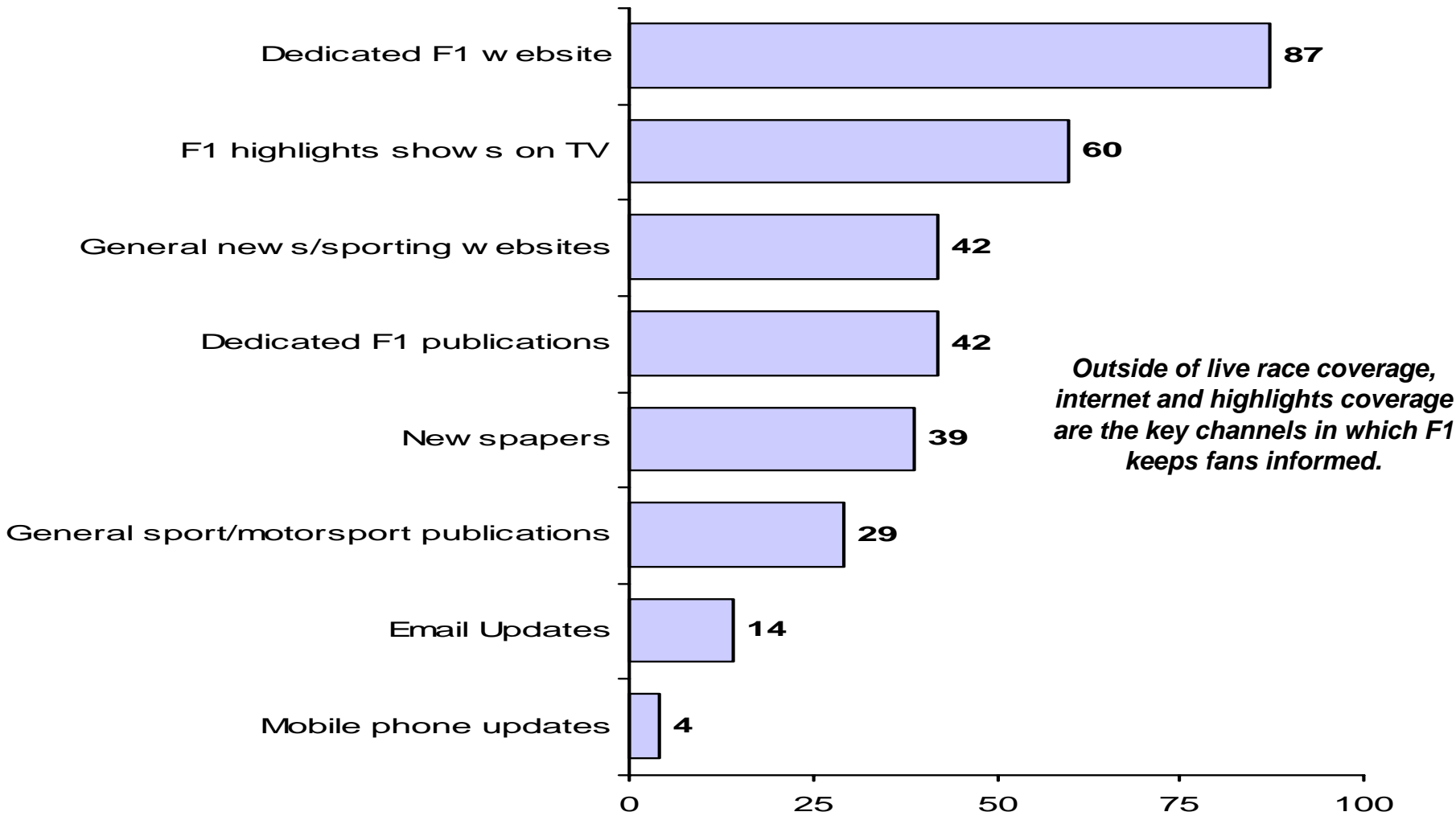
New Media and Online Content Uptake

Summary Points

- Outside of TV, the internet, particularly dedicated F1 websites, play an important role for fans in helping them to stay informed about what is happening in F1. Eighty seven percent of fans claim that they stay informed through this channel.
- Fans were open to new media channels and content, particularly internet based platforms:
 - 68% would be likely to subscribe to watch 'behind the scenes' features via the internet.
 - 58% would be likely to watch F1 highlights via the internet.
- Fans' openness to uptake services through mobile phone services was low with 1 in 10 fans likely to subscribe to watch highlights and F1 races on their mobile. This is perhaps a reflection of a lack of familiarity with the new offering.
- There was strong appeal for access to online content that put fans 'in the race':
 - 48% were extremely likely to access the option to stay on-board with drivers during the race
 - 47% were extremely likely to access position 1 to 4 timing information

F1 Consumption

The internet is a key channel for staying informed

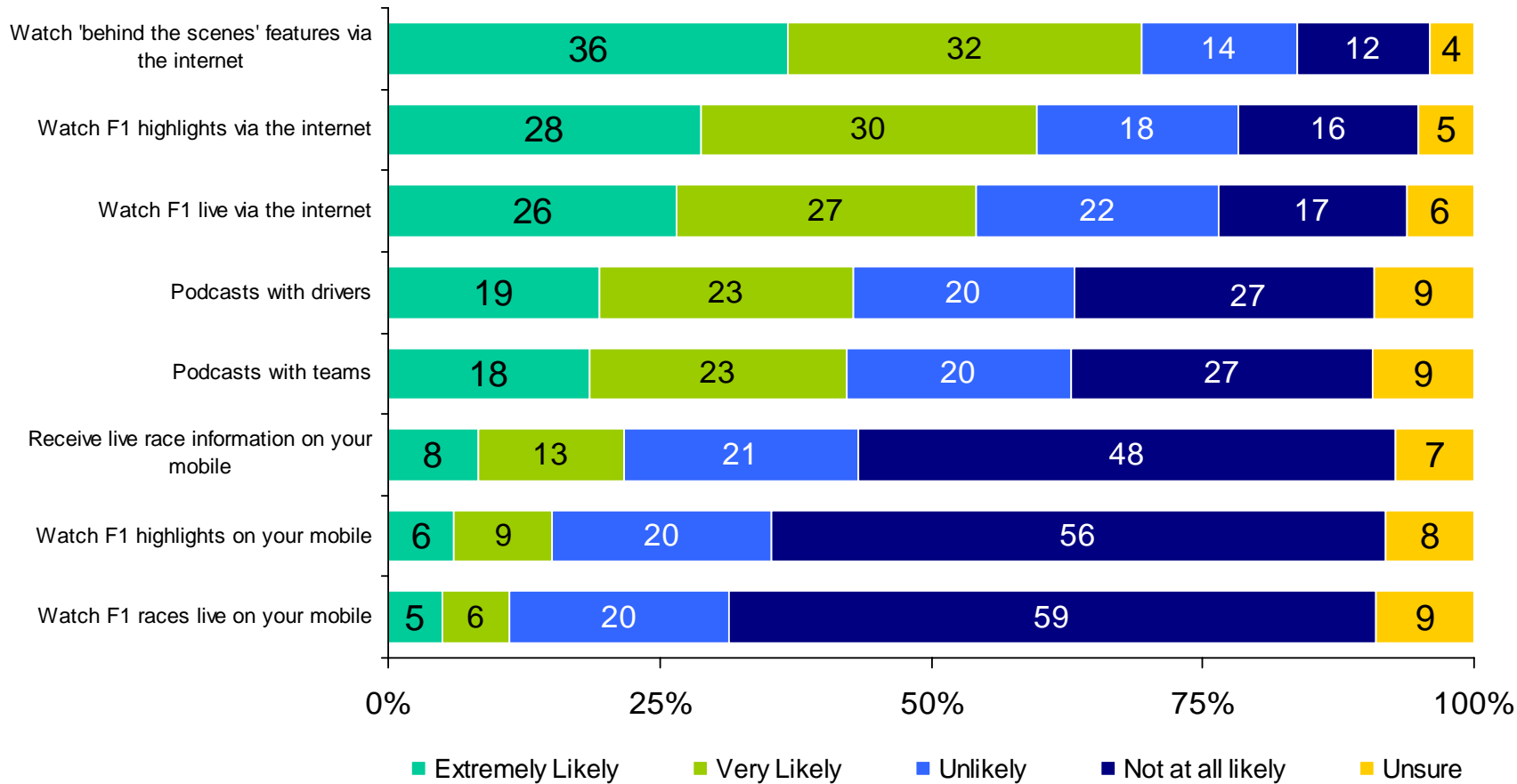


Q10: What are the places that you go to stay informed about what is happening in F1?
Base: N=91,834

New Media Uptake

F1 fans are open to new media channels and content, particularly internet platforms

How likely would you be to subscribe to...



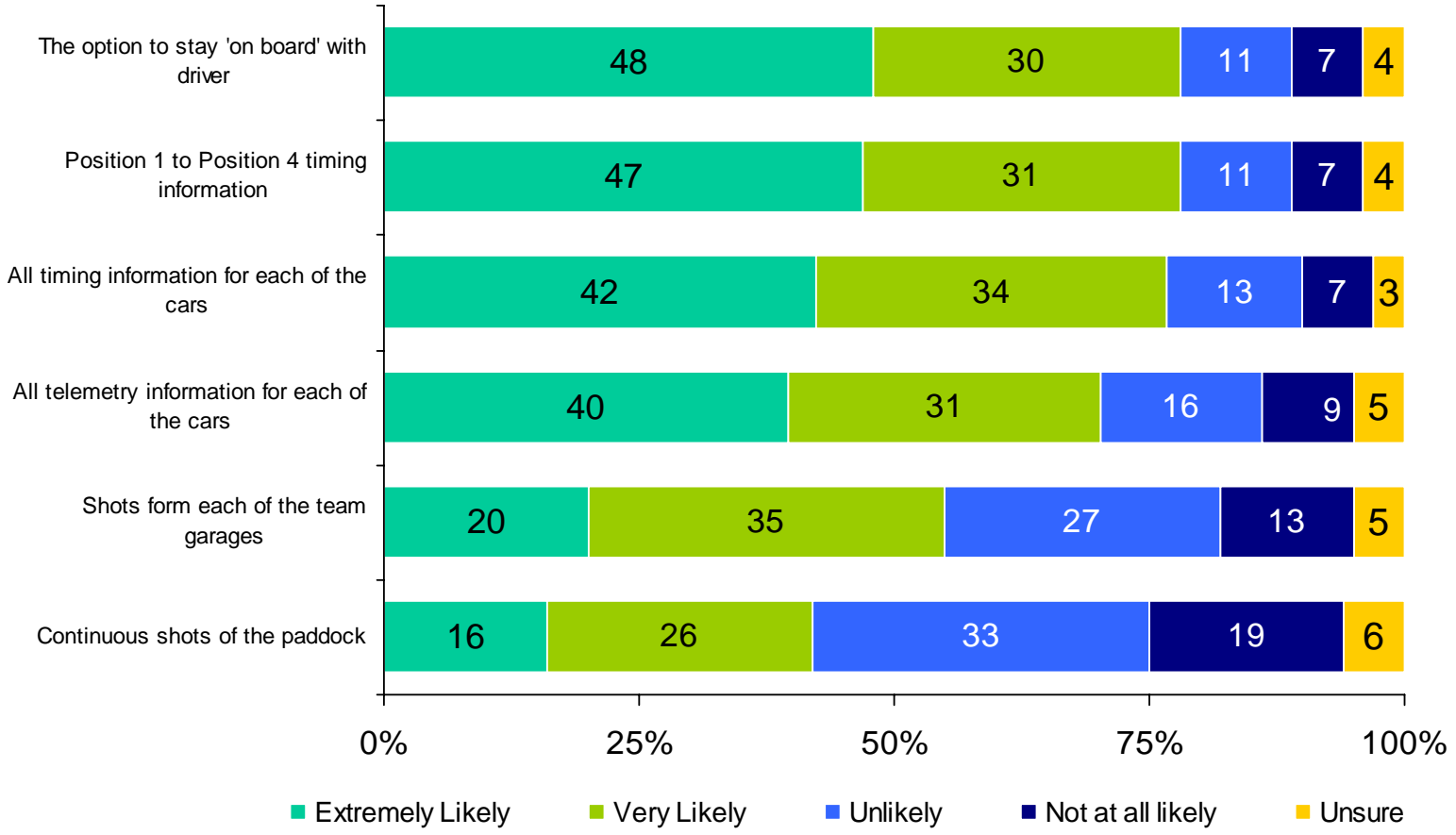
Q7: How likely would you be to subscribe to...?

Base: N=91,834

Online Content Uptake

On-Board Camera and Timing information have the strongest appeal

How likely would you be to access the following features online during F1 race coverage...



Q12: How likely would you be to access the following features online during F1 race coverage...?
 Base: N=91,834

Season Comparisons



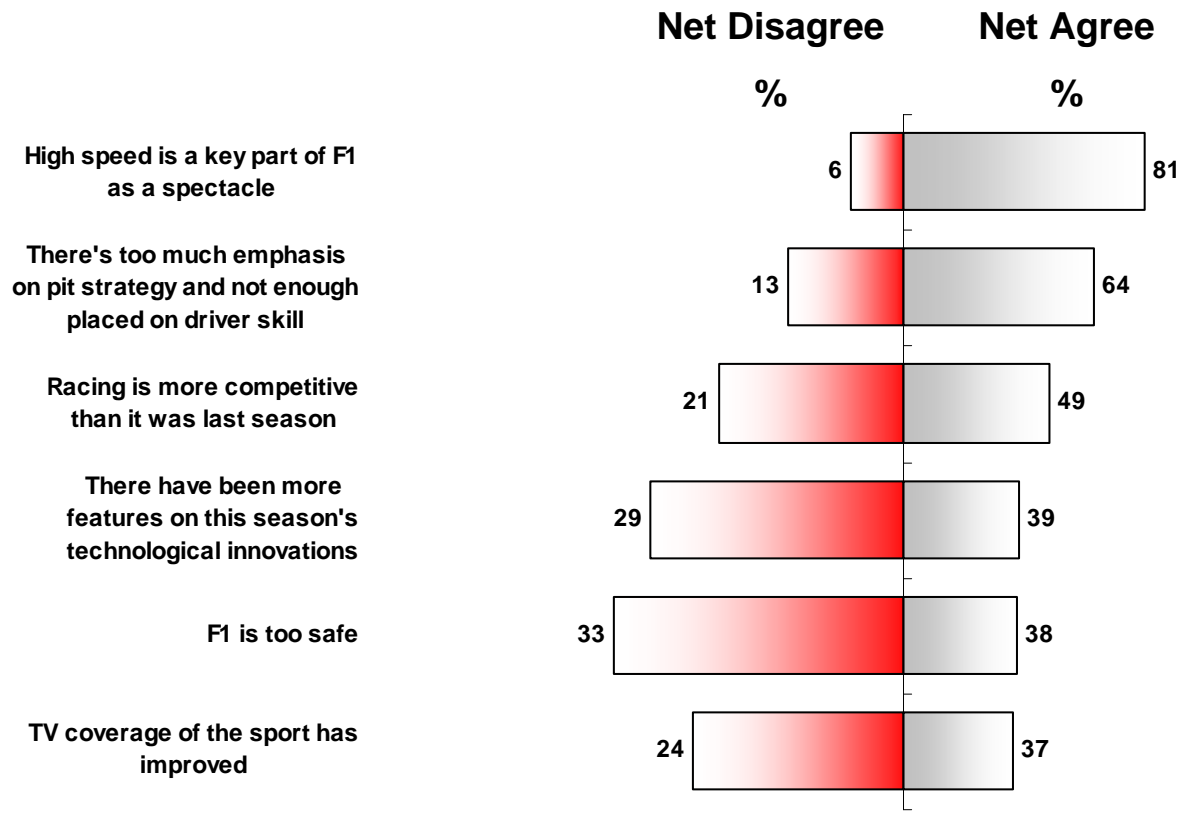
Season Comparisons

Summary Points

- There has been a positive reaction to the changes incorporated into F1 this season with half of fans – 49% – agreeing that racing is more competitive than it was last season.
- Pit-stop strategies were seen to have made racing more exciting (60% saying racing is more exciting). However, 64% of fans also agreed that there was too much emphasis placed on pit strategy and not enough placed on driver skill.
- Two-thirds of fans (66%) also believed that the re-introduction of tyre changes this season had made racing more exciting.
- Eighty-one percent of fans agreed that high speed is a key part of F1 and there was some polarisation among fans as to whether or not the sport had become too safe with 39% of fans agreeing and 33% of fans disagreeing that F1 is too safe

Season Comparisons

1 in 2 fans agree that the sport is more competitive than last season

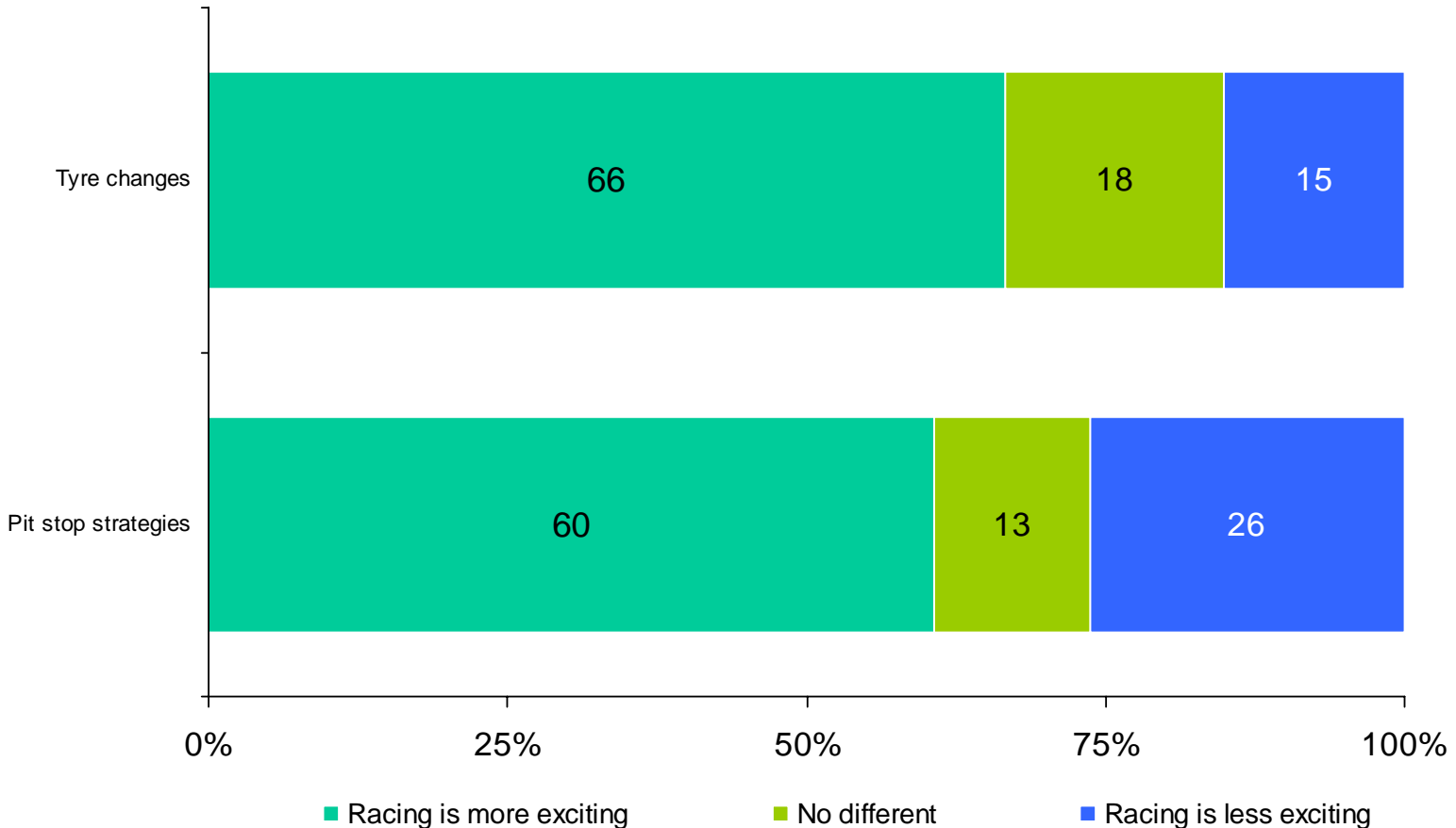


High speed and driver skill remain key elements in the sport for fans

Q13: Please tell me how strongly you agree or disagree with each of the following statements about the 2006 season so far.
Base: N=91,834

Season comparisons

Tyre changes and Pit-stop strategies have made racing more exciting



Q14: Tyre changes were re-introduced into F1 in 2006 (they were not part of the 2005 season). In comparison to 2005, would you say that the re-introduction of tyre changes this season has made F1 more exciting...

Q15: Which of the following statements best describes your view on pit-stop strategies used by teams?

Base: N=91,834

Qualifying

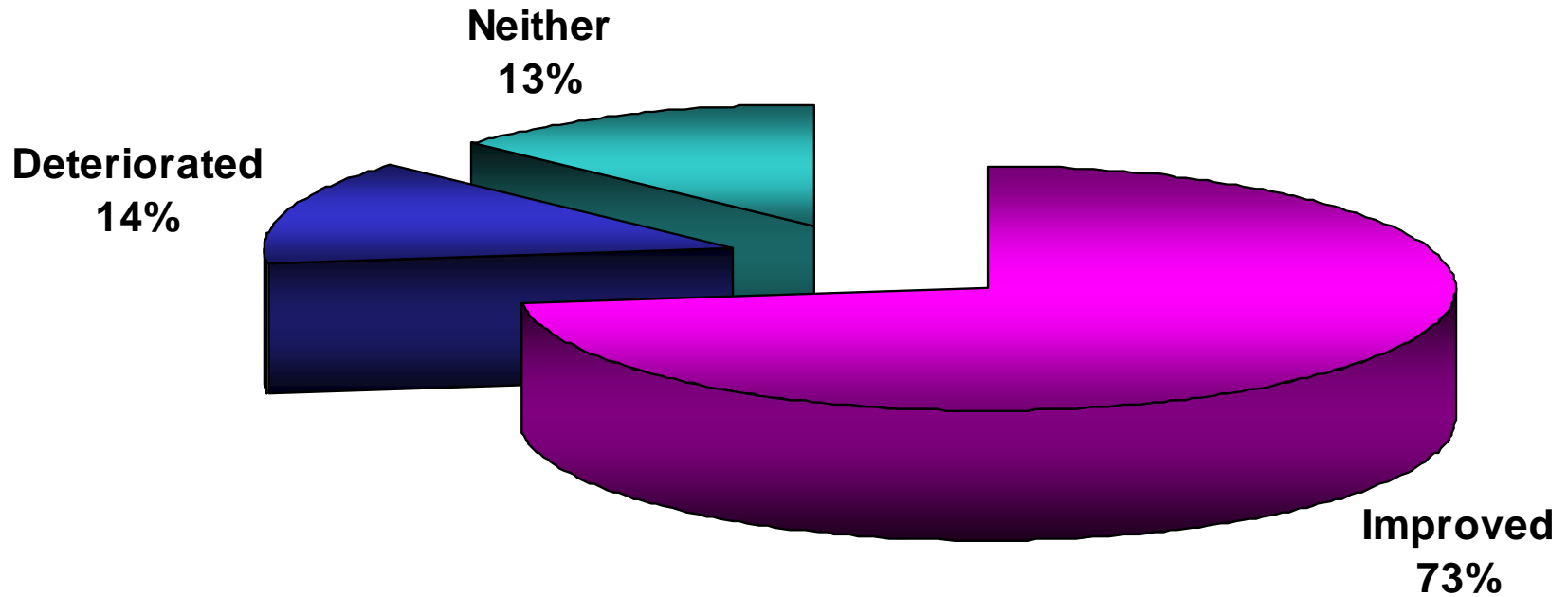


Qualifying Summary Points

- The majority of fans, 73%, believed that qualifying had improved this season.
- Two thirds (66%) agreed that qualifying is more exciting than in previous seasons and 53% agreed that, qualifying has helped to make racing more competitive than it was last season.
- Significantly, over half of fans (52%) are watching more qualifying than they did last season – a strong endorsement that the new format is working.
- Just under half of fans (48%) believed that the final shoot-out session for qualifying had made qualifying more exciting for fans.

Qualifying

7 in 10 fans believe that qualifying has improved this season

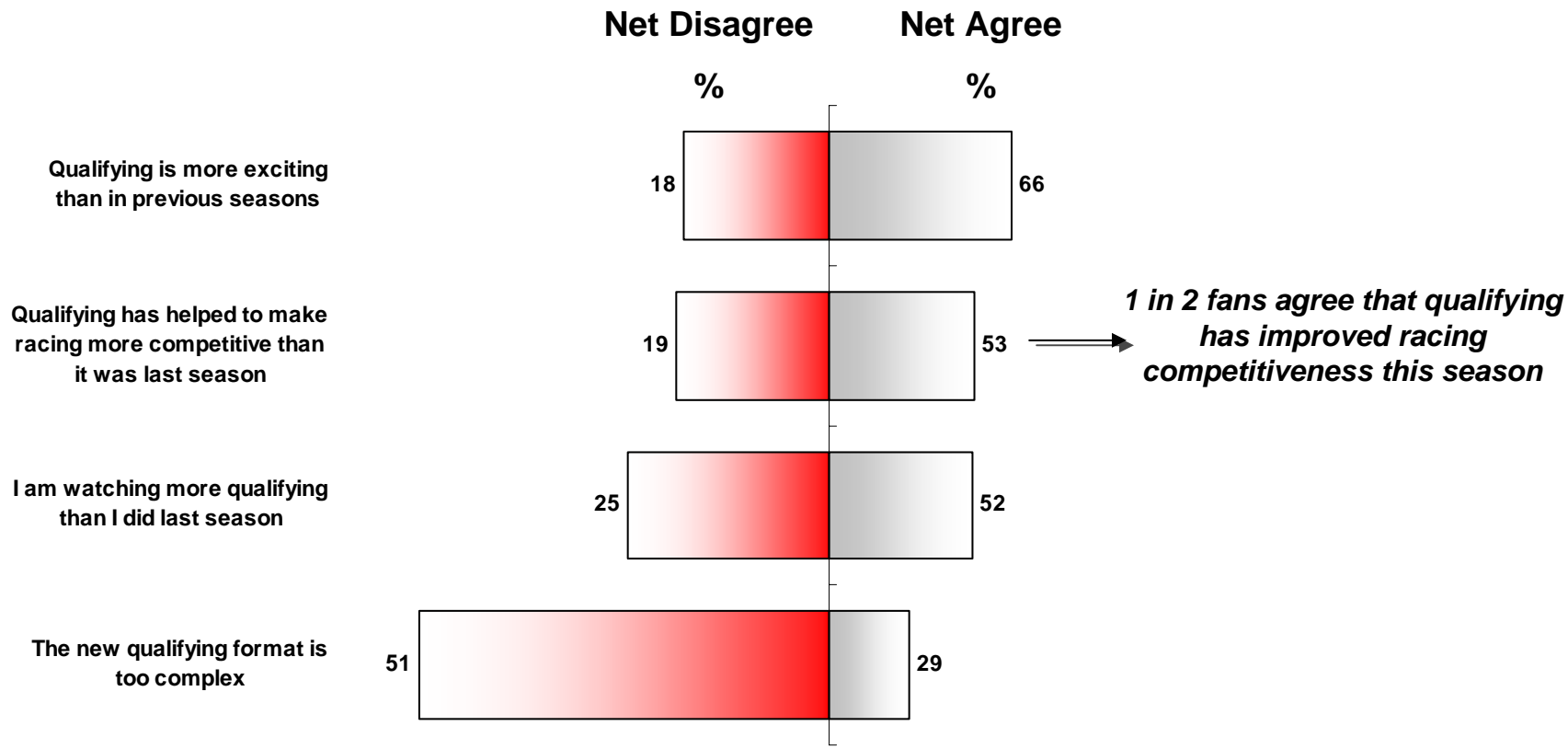


Q16: In your opinion, has qualifying improved or deteriorated in comparison to last season?

Base: N=91,834

Perceptions of Qualifying

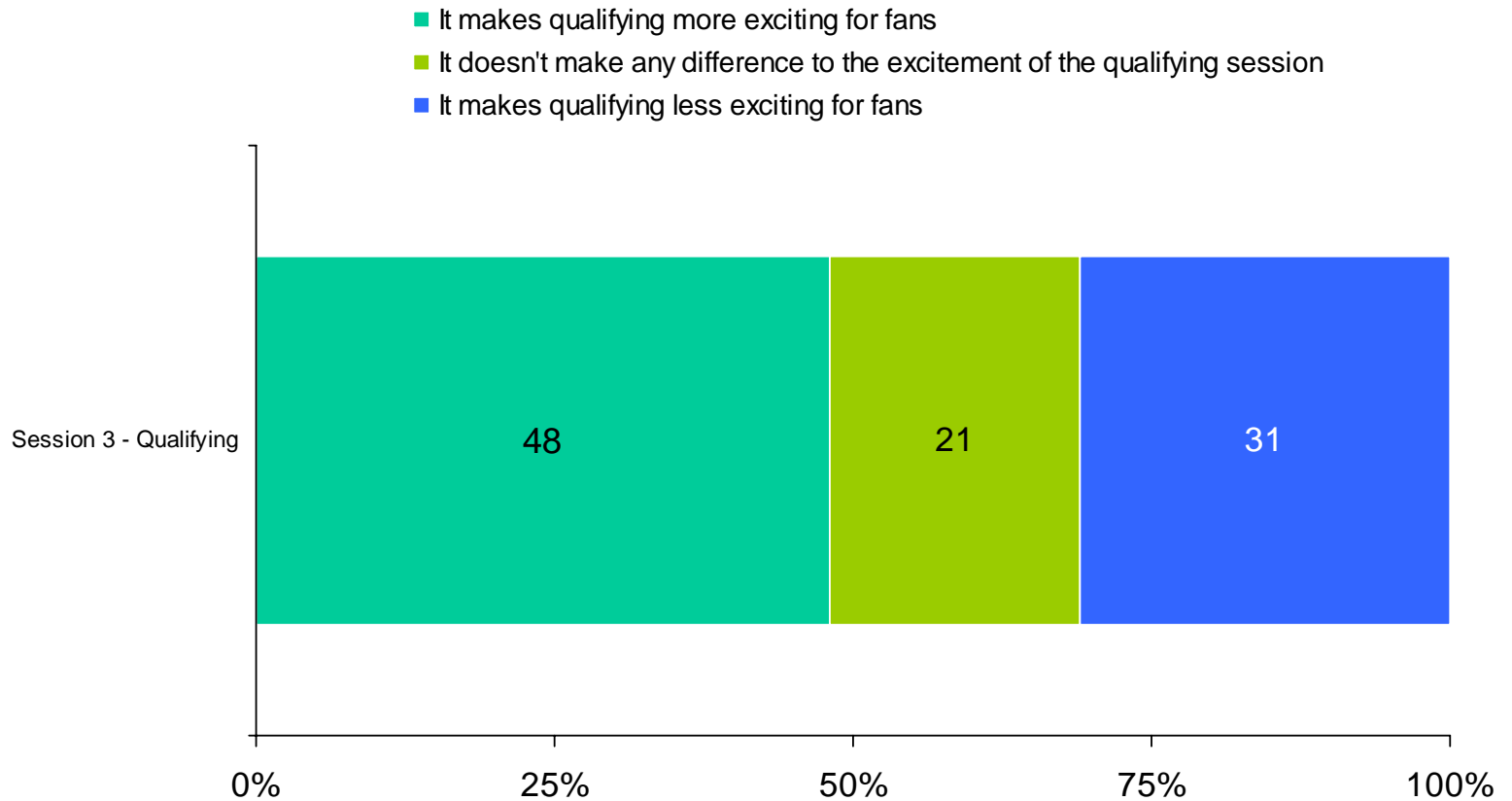
The new qualifying format is more exciting and fans are watching more



Q13: Please tell me how strongly you agree or disagree with each of the following statements about qualifying so far this season.
Base: N=91,834

Qualifying

The session's shoot-out has made qualifying more exciting



Q18: Which of the following statements best describes your view on session 3 of qualifying?

Base: N=91,834

TV and Press Coverage



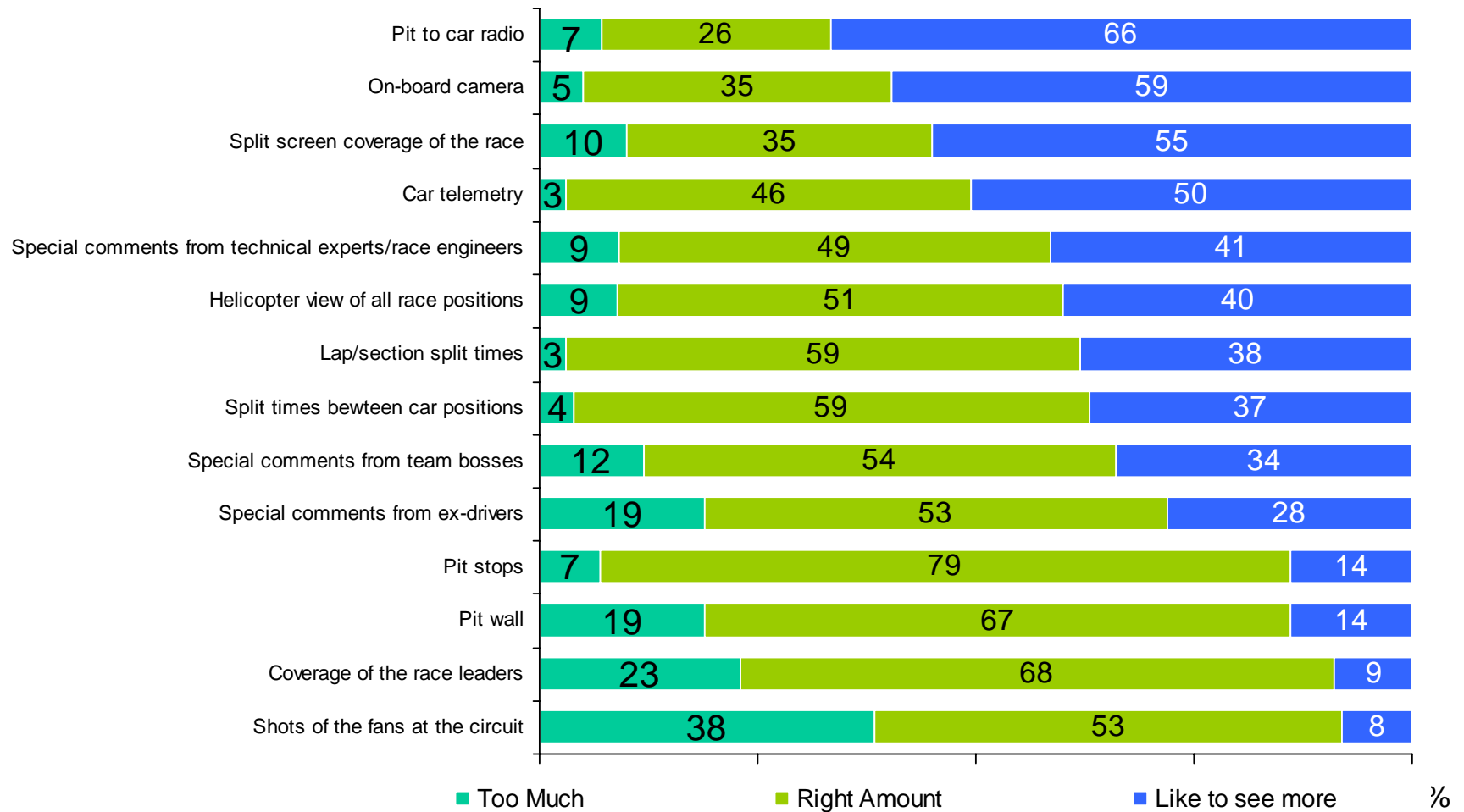
TV and Press Coverage

Summary Points

- Coverage that made fans 'a part of the race' was of greatest appeal to fans. Specifically fans would like to see more;
 - Pit to car radio – 66% would like to see more
 - On-board camera – 59%
 - Split-screen coverage of the race – 55%
 - Car telemetry – 50%
- Fans wanted greater access to drivers and team engineers in both TV and press coverage of the sport.
- 80% of fans claimed that they want more in-depth interviews with drivers and 66% with team engineers.
- Technology (73%) and Behind-the-scenes features on team factories (65%) were the topics that fans would most like to see in-depth coverage of

TV Coverage

Coverage that makes fans ‘a part of the race’ of greatest appeal

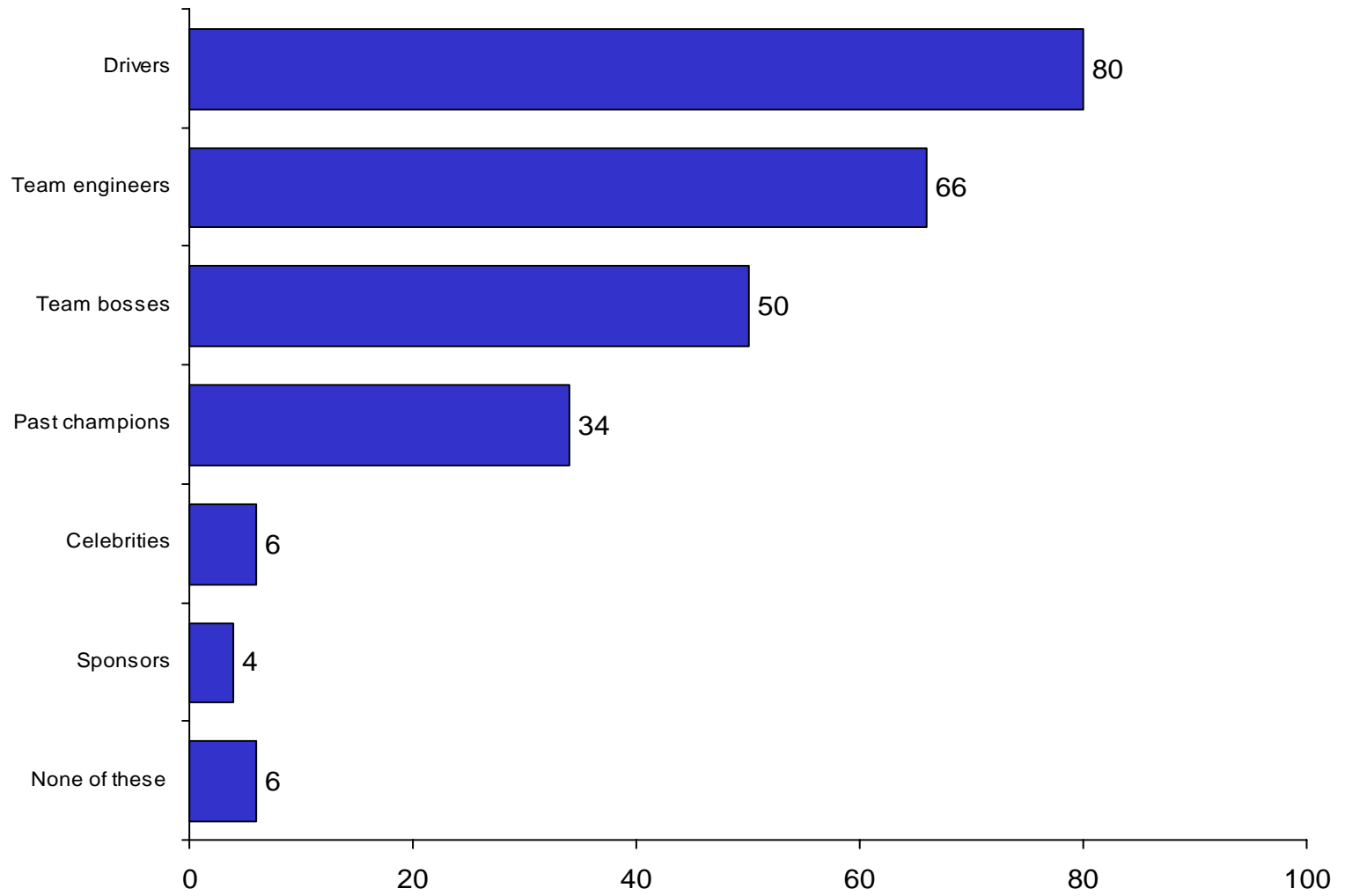


Q20: Thinking about each of the different types of race information and graphics used in TV coverage, how do you rate the amount of time that we show each of the following during race coverage:

Base: N=91,834

In-depth interviews

Fans want greater access to drivers and team engineers

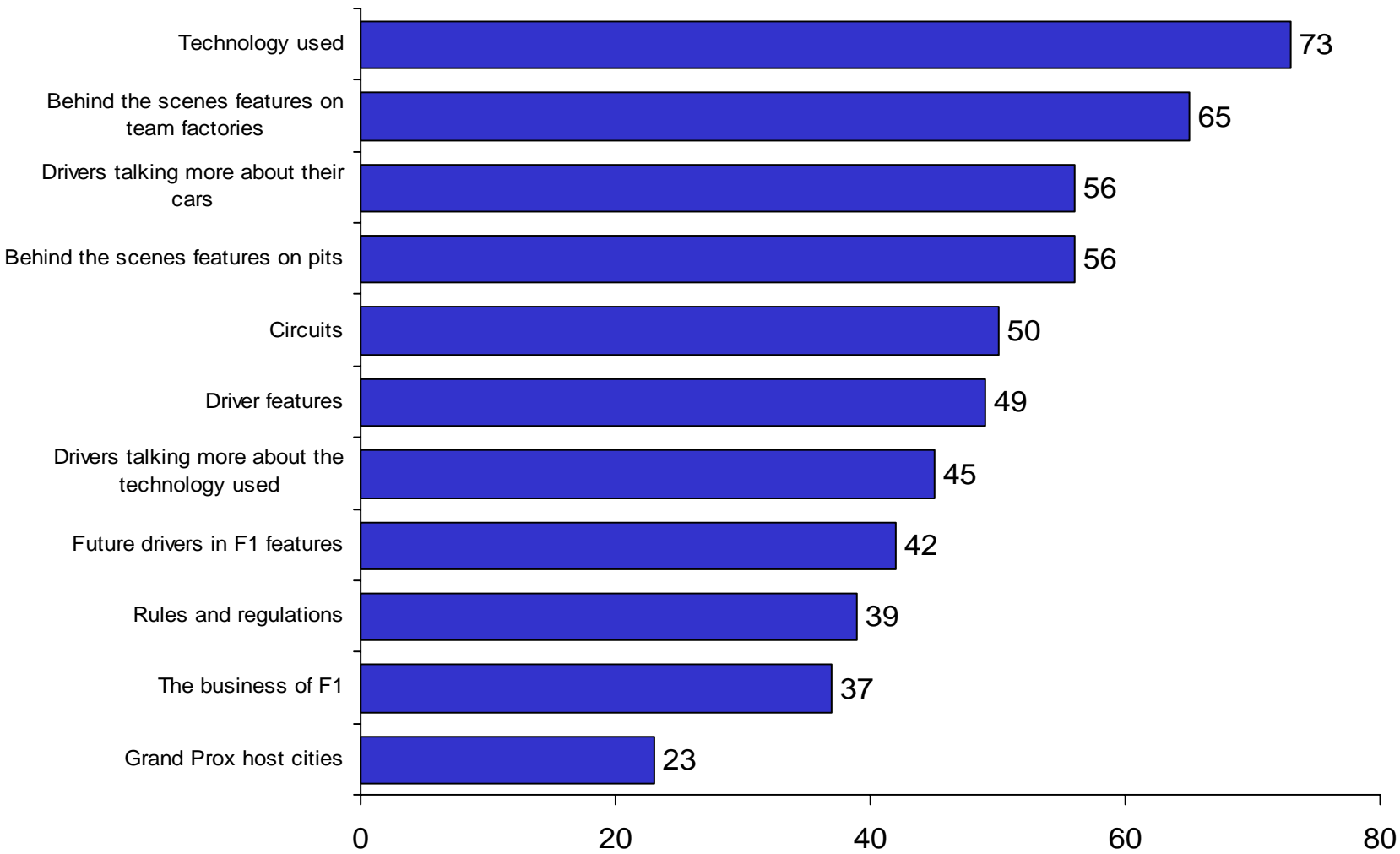


Q21: Who would you like to see more in-depth interviews with?

Base: N=91,834

In-depth coverage

Technology and features on factories and cars were the topics of most interest to fans

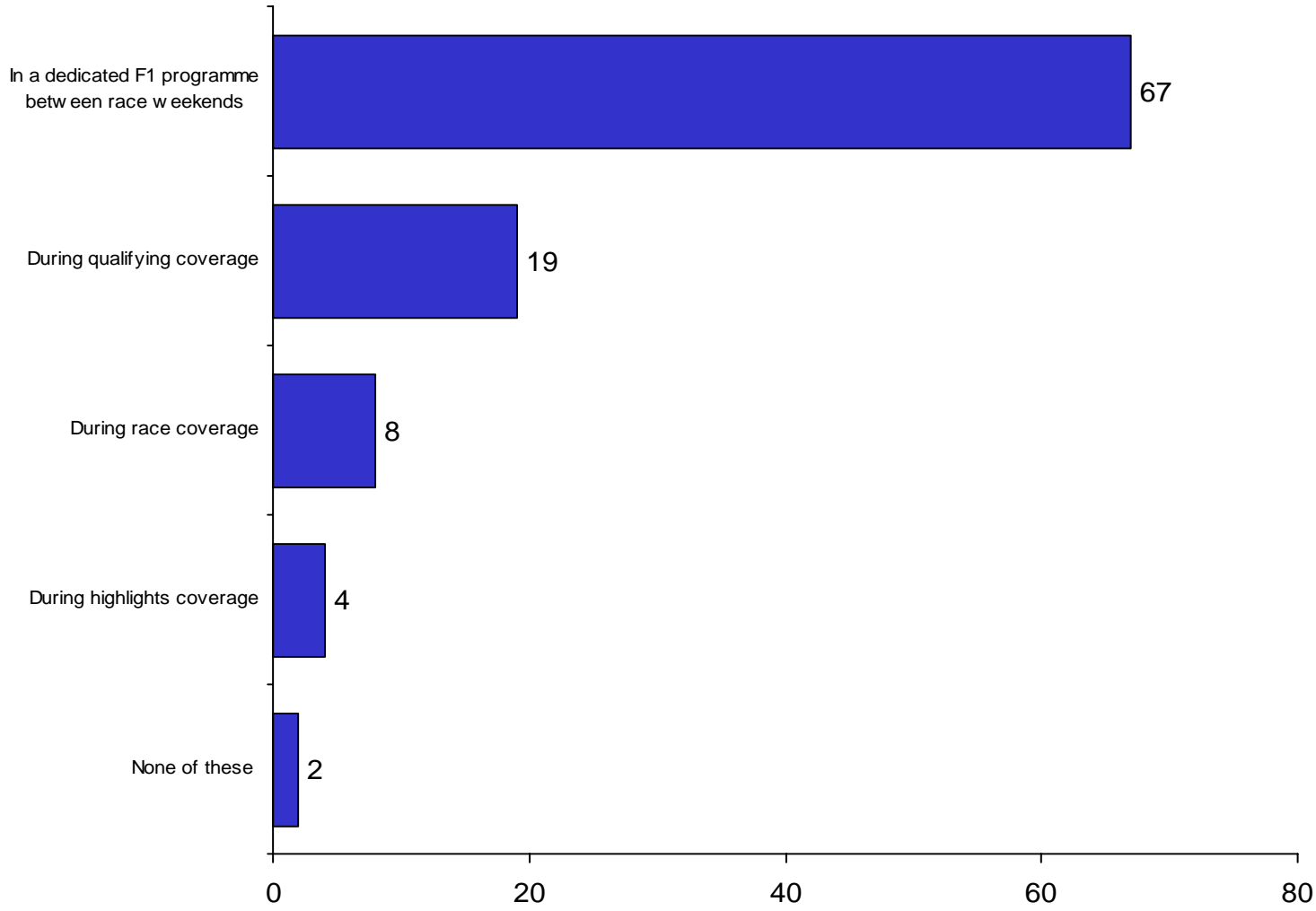


Q22: What topics would you like to see more in-depth coverage of?

Base: N=91,834

What is the best time to engage F1 fans with more in-depth coverage?

Dedicated programming outside of race coverage was their preferred time

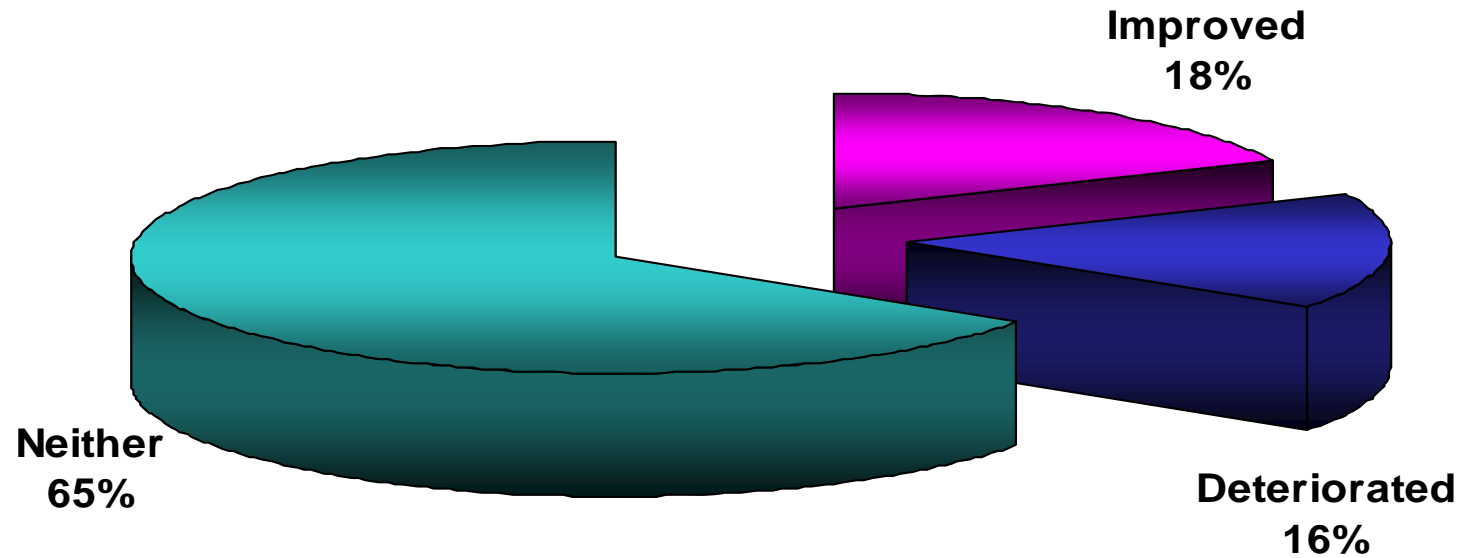


Q23: In your opinion, when is the best time to see more in-depth interviews on technology?

Base: N=91,834

Press coverage

There was no noticeable shift in fans' perceptions of press coverage

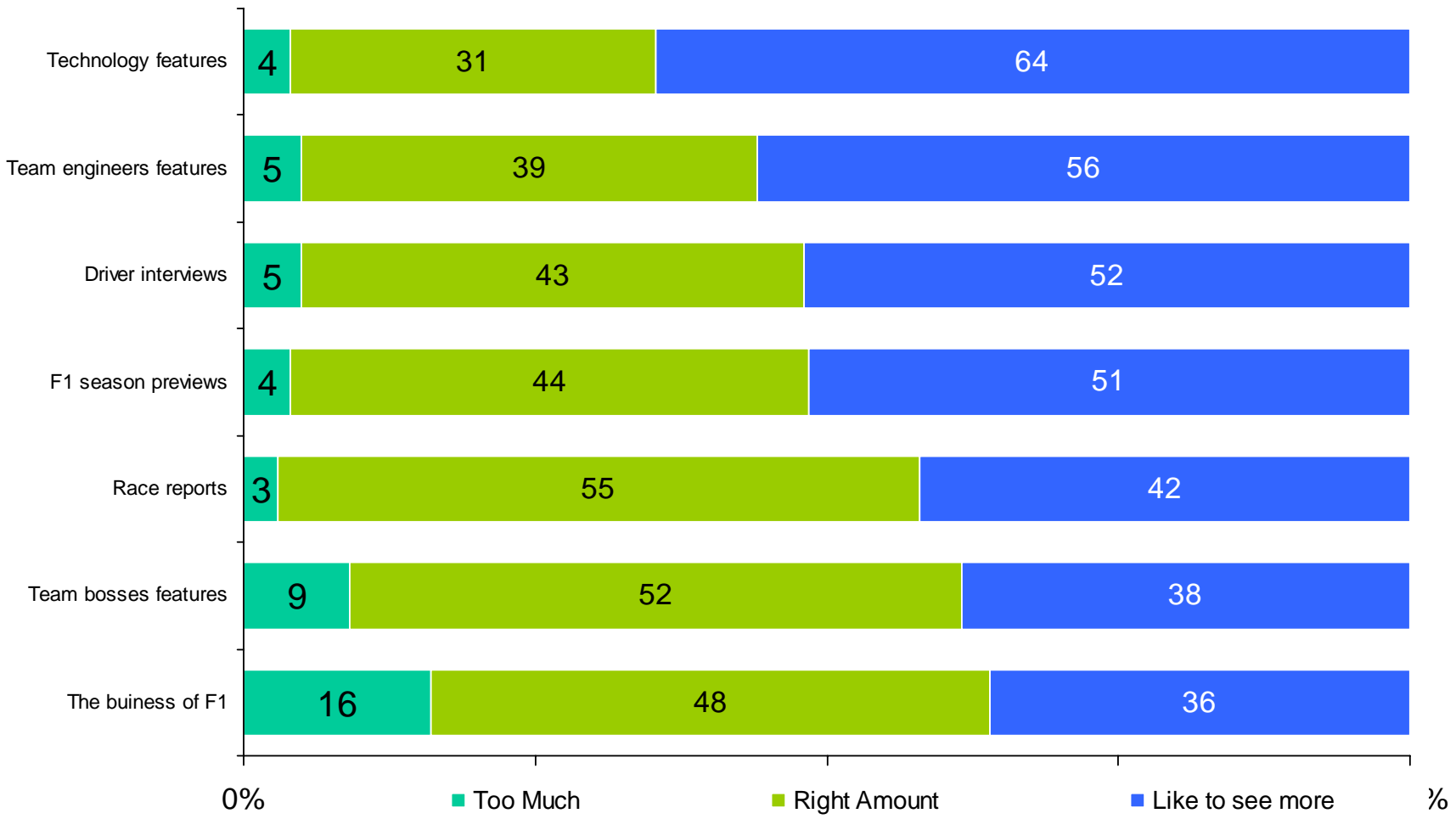


Q24: In your opinion, has press coverage improved or deteriorated in comparison to last season?

Base: N=91,834

Press Coverage

Again, fans were seeking greater access to drivers and team engineers



Q25: Thinking about each of the different types of F1 press coverage how would you rate the amount of coverage that F1 receives?
Base: N=91,834

Technology



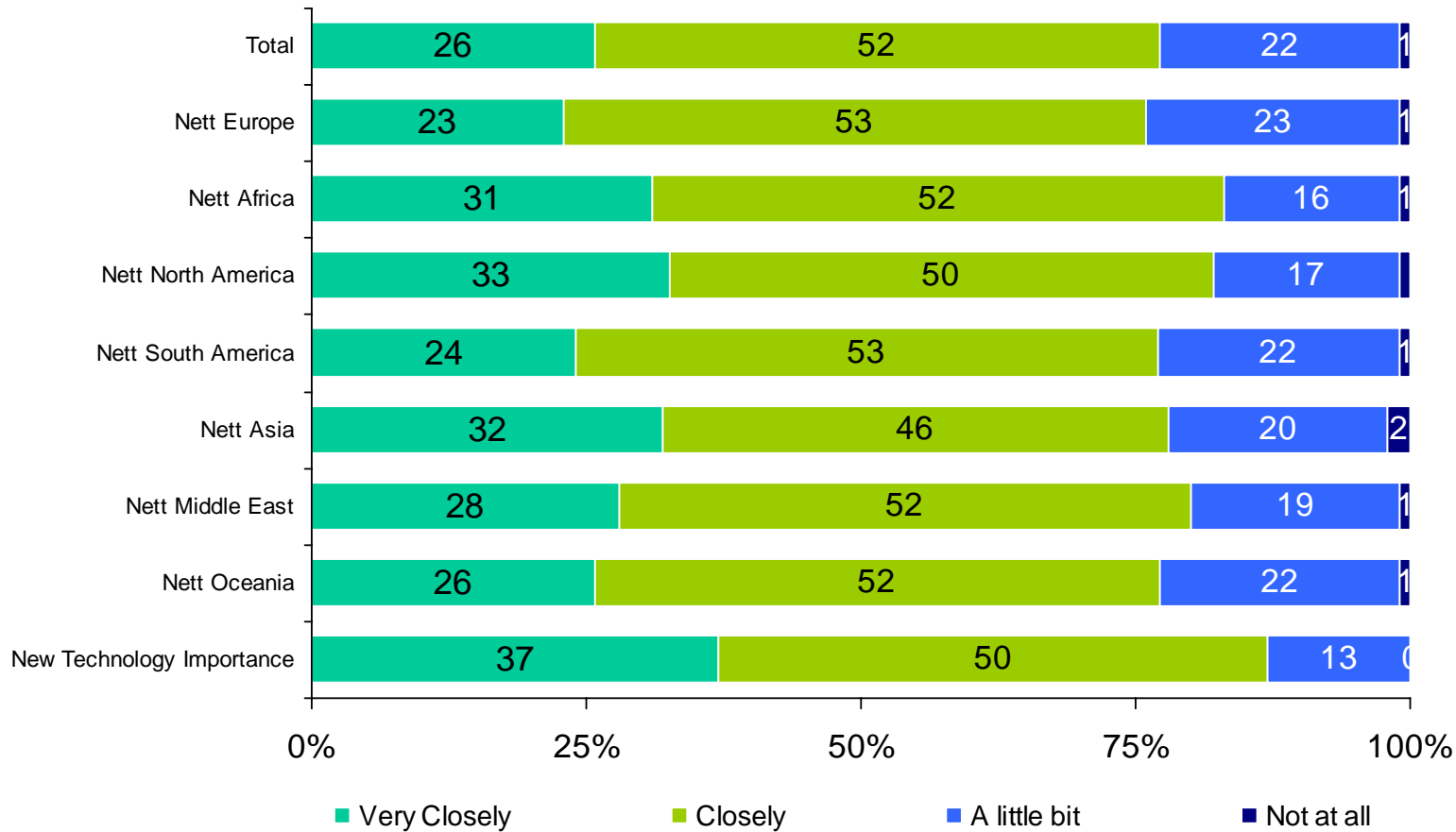
Technology

Summary Points

- Fans had a strong engagement with the technological aspects of the sport. A quarter of fans (26%) claimed that they follow the technical aspects of the sport very closely.
- Fans also claimed a strong knowledge of the technical aspects of the sport – mean rating 7.47 (on a 10 point scale). Asians claimed a lower level of knowledge of the technical aspects.
- Information about technology was largely gained through the race coverage (77%) and from the technical information available on dedicated F1 websites (73%).
- Fans have a strong appetite for more information about technology with 71% of fans claiming that they would like to see more information about technology.
- Perceptions about technology in F1 were also positive, although some polarisation remains among fans on agreement with the statement that Technology is the most exciting aspect of F1 – 37% agree, 30% disagree.
- 70% of fans agree that they look forward to the technology innovations each season, up 6% from last season.
- Those closest to the technology, team engineers, were the people that fans felt were the best to speak to them about technology – 50%. Just under a third believed that it didn't matter who spoke to them about technology.

Engagement with Technology

A quarter of fans claim that they follow technical aspects very closely

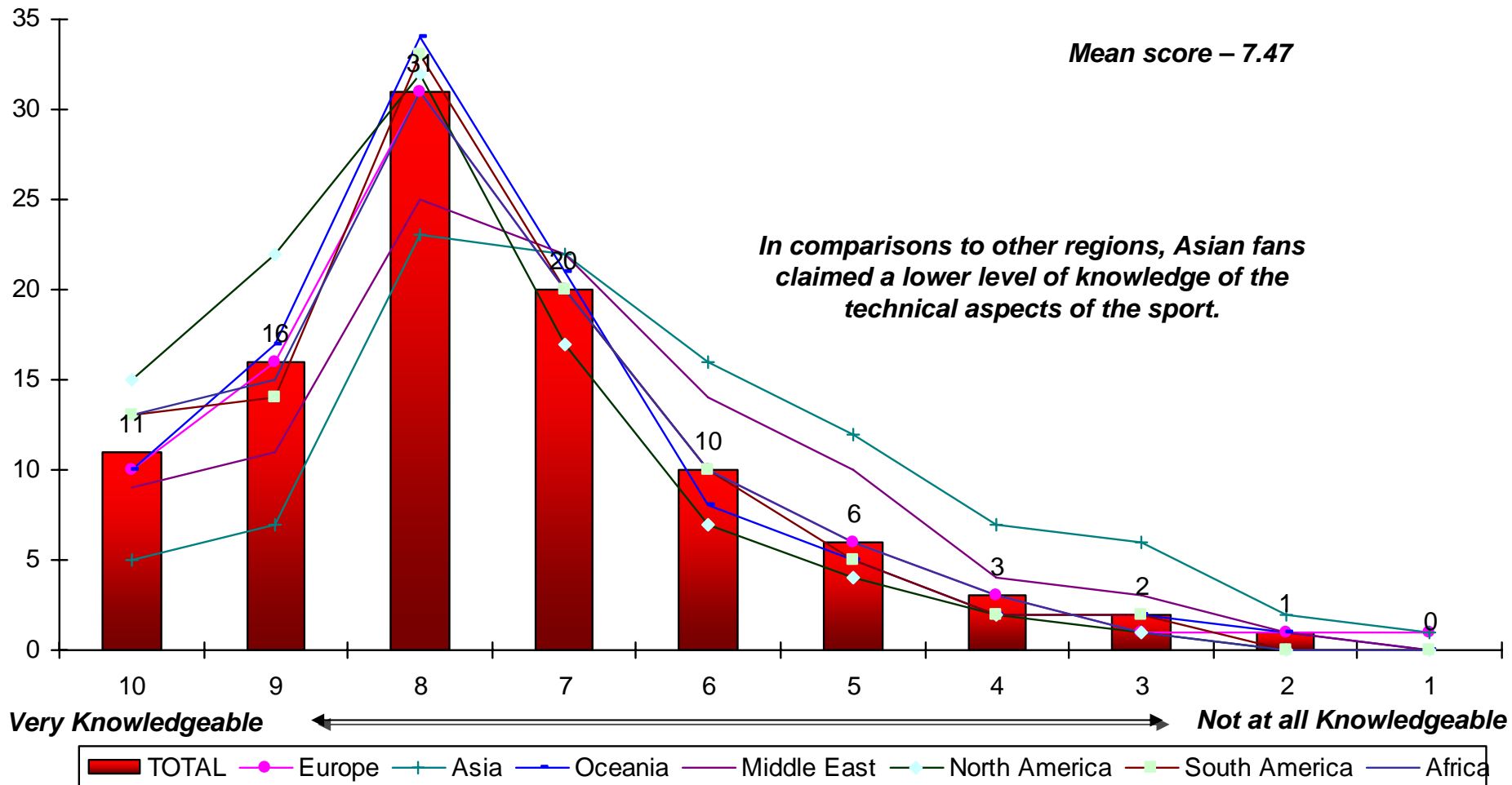


Q29: Would you say that you actively follow the technical aspects of the sport?

Base: N=91,834

Knowledge of technical aspects of F1

Fans claimed a strong knowledge of the technical aspects of the sport

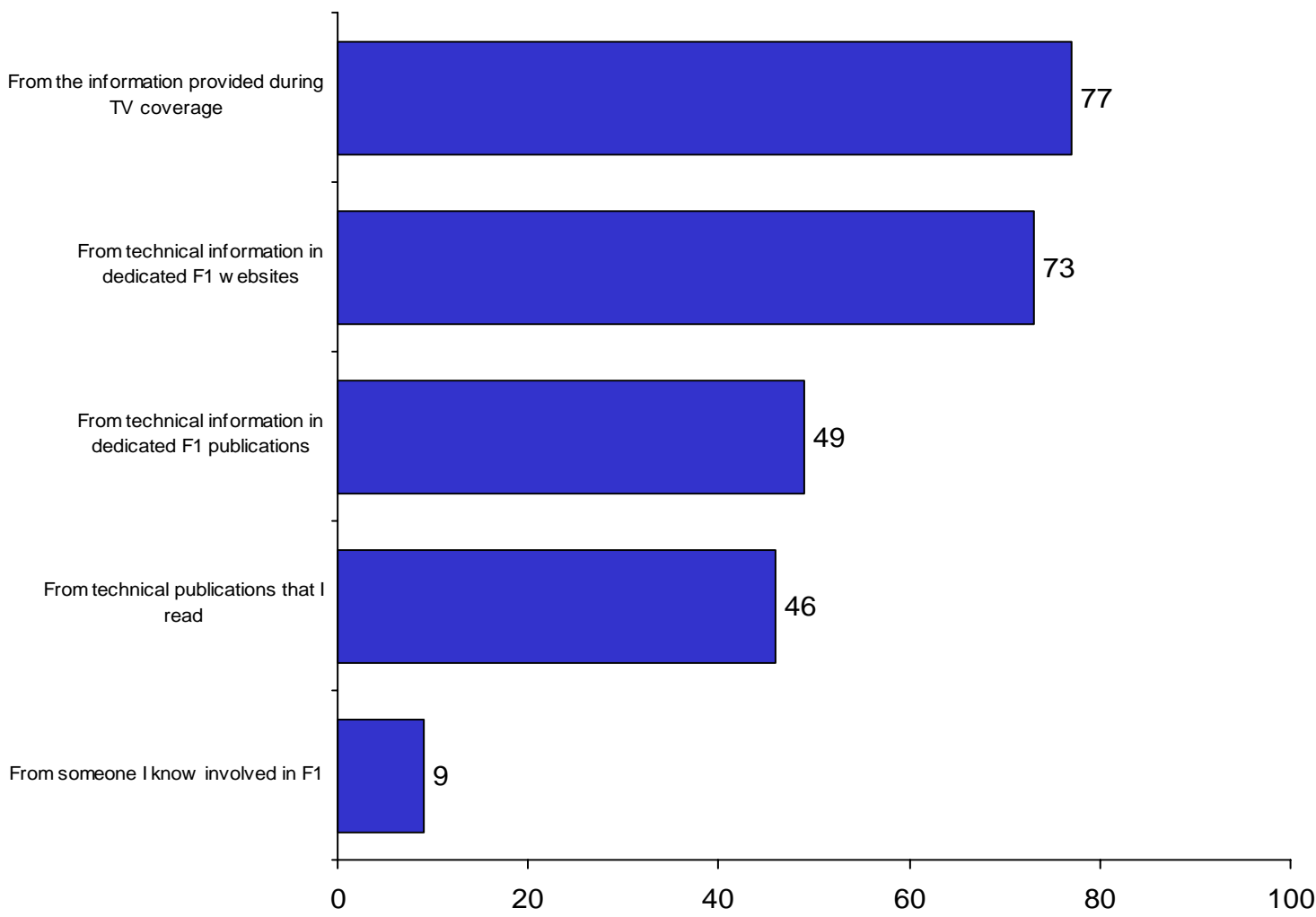


Q26: How would you rate your understanding of the technical aspects of F1?

Base: N=91,834

Main sources of knowledge

TV coverage and websites were the key sources of fans technical knowledge

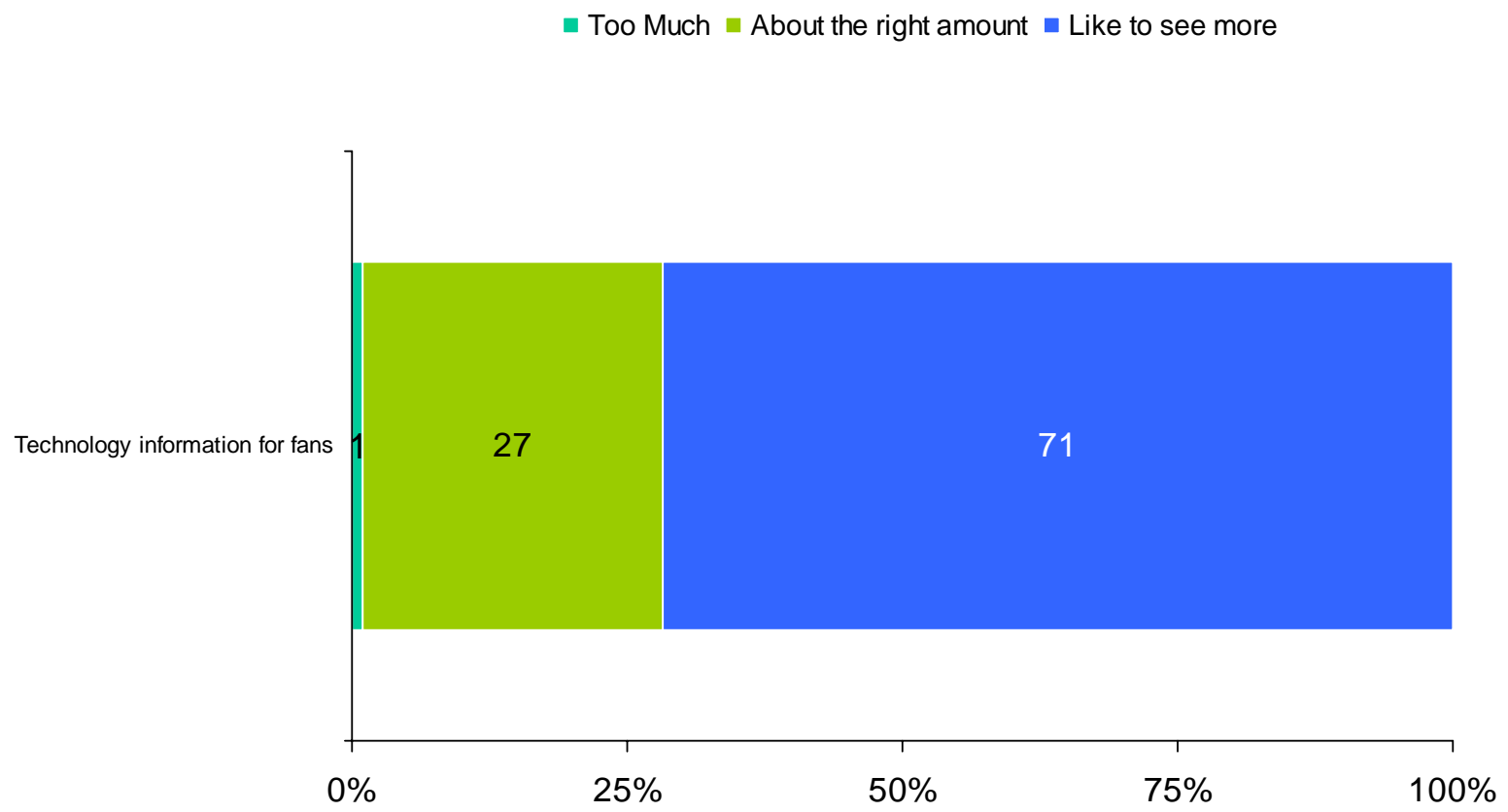


Q27: What are the main sources of your knowledge of the technical aspects of F1?

Base: N=91,834

Technical information for fans

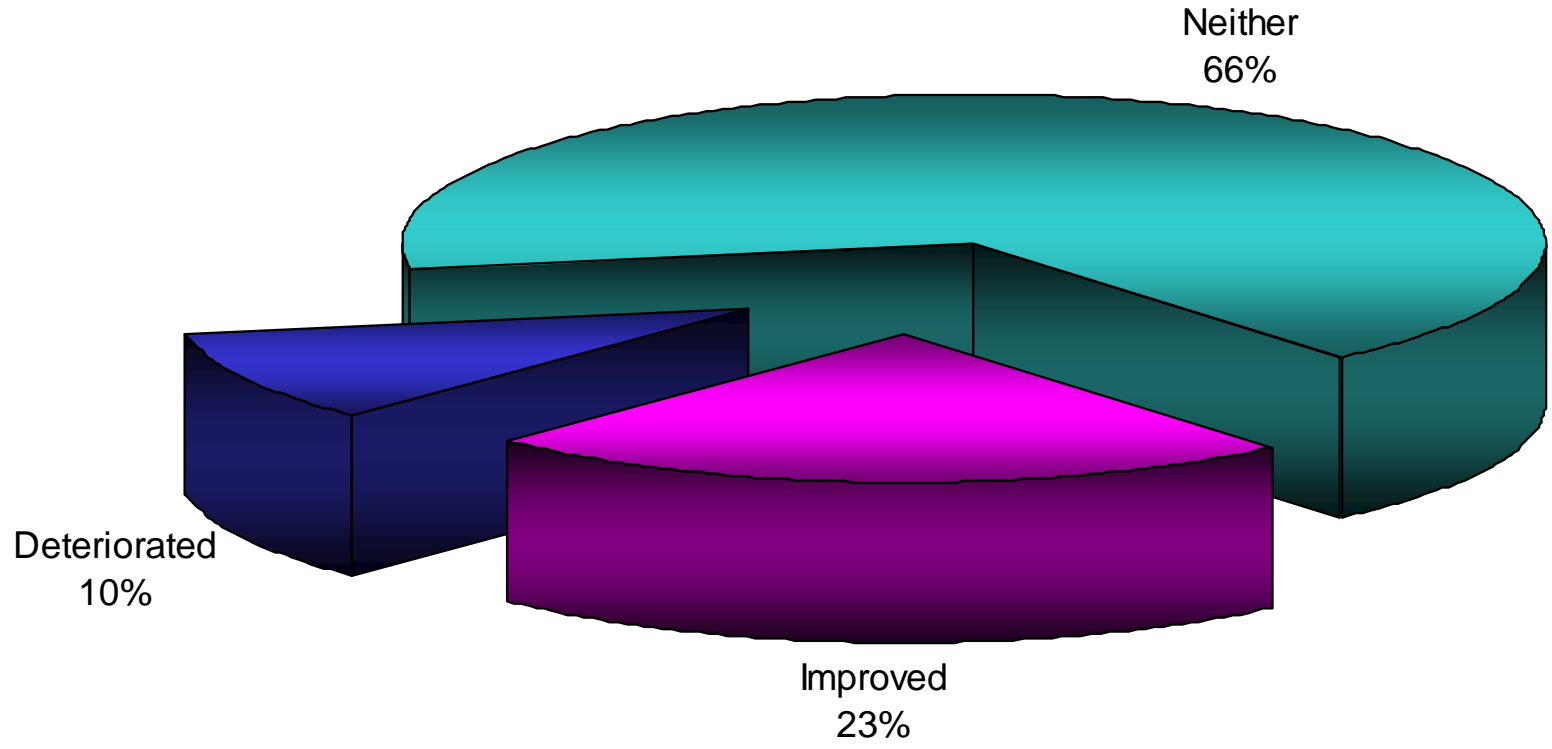
Fans have a strong appetite for more information about technology



Q28: How would you rate the amount of information about technology in F1 that is available for fans?
Base: N=91,834

Technology coverage

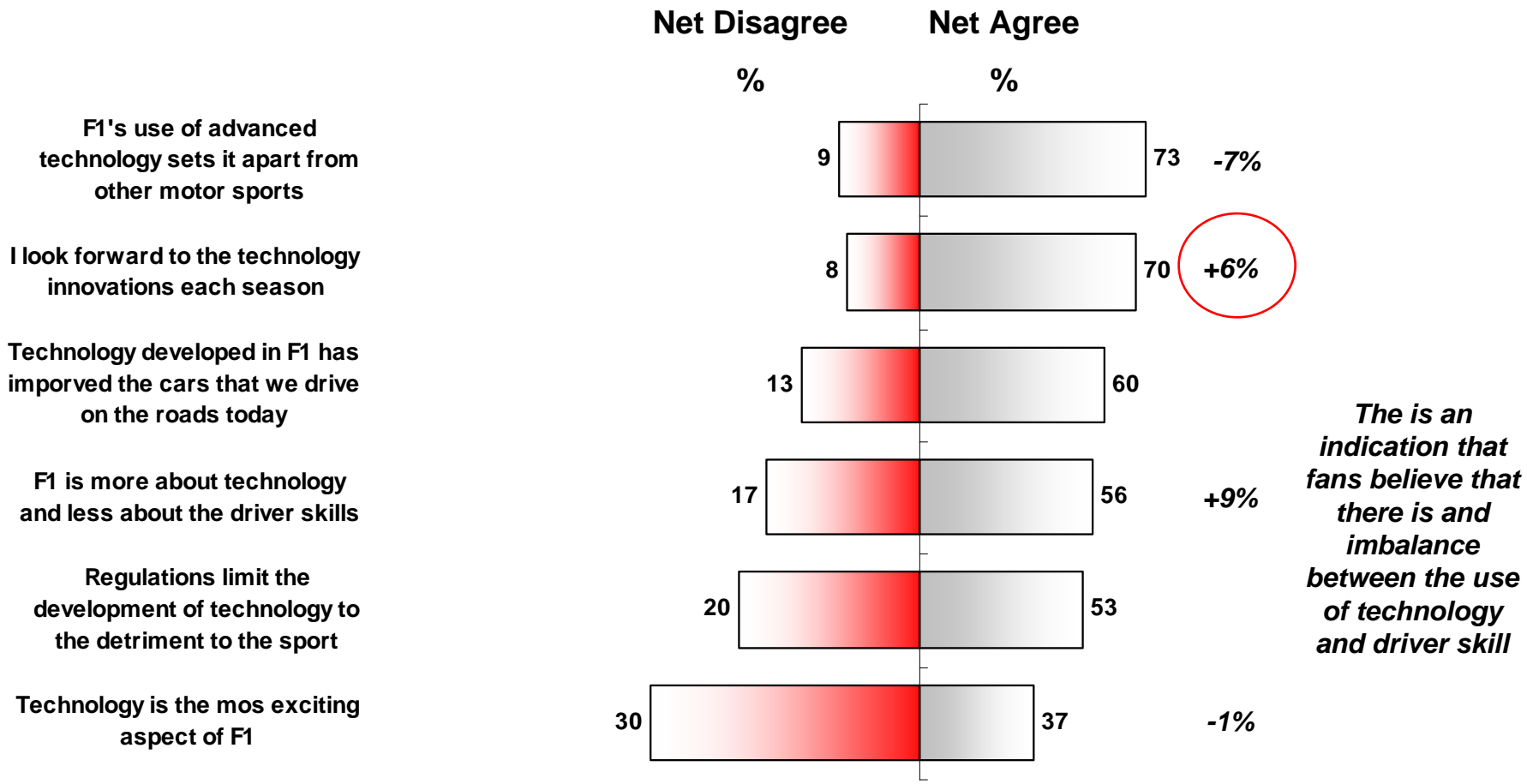
Just under a quarter of fans believed that coverage of the technical aspects of the sport had improved this season



Q24: In your opinion, has coverage on the technical aspects of the sport improved or deteriorated when compared to last season?
Base: N=91,834

Technology Perceptions

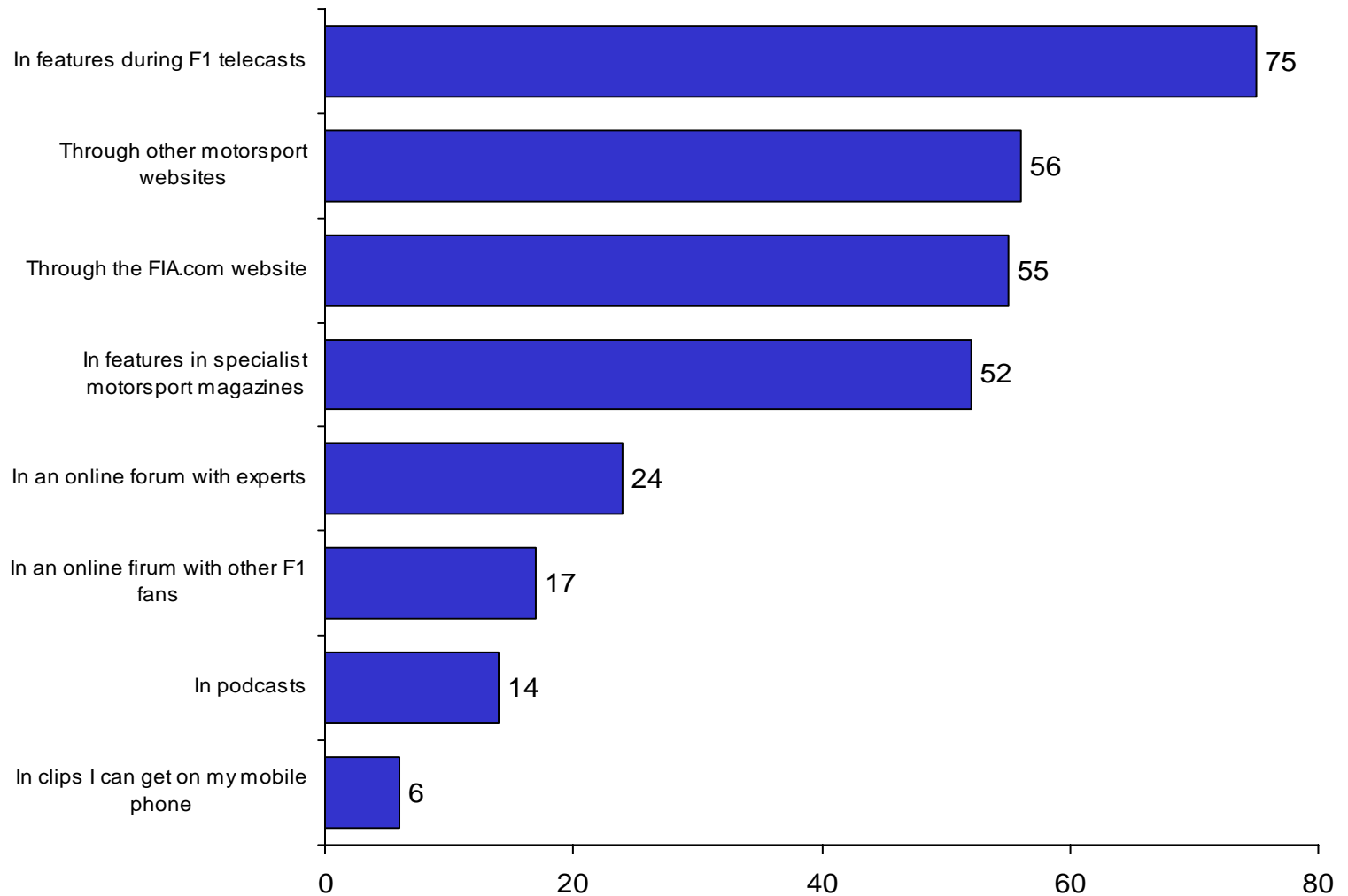
Technology remains of strong interest to F1 fans



Q7: How strongly do you agree or disagree with the following statements about technology in F1?
Base: N=91,834

Technology Information

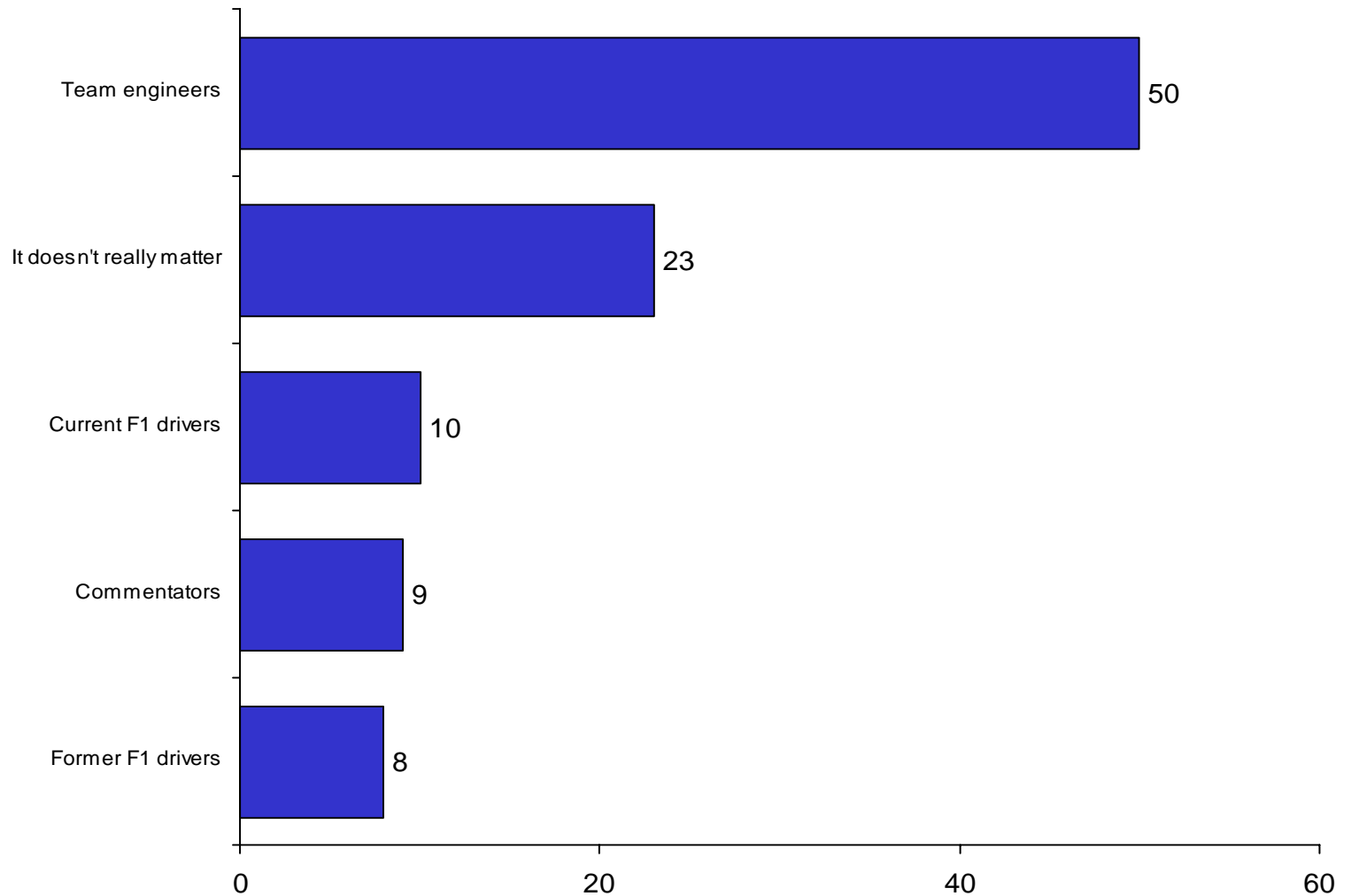
Fans preferred to receive technology information during F1 telecasts



Q32: How would you like to receive information about technology in F1?

Base: N=91,834

Who is the best person to talk to fans about technology? Those closest to the technology – team engineers



Q33: Who is the best person to talk to fans about technology?

Base: N=91,834

Future Aspects



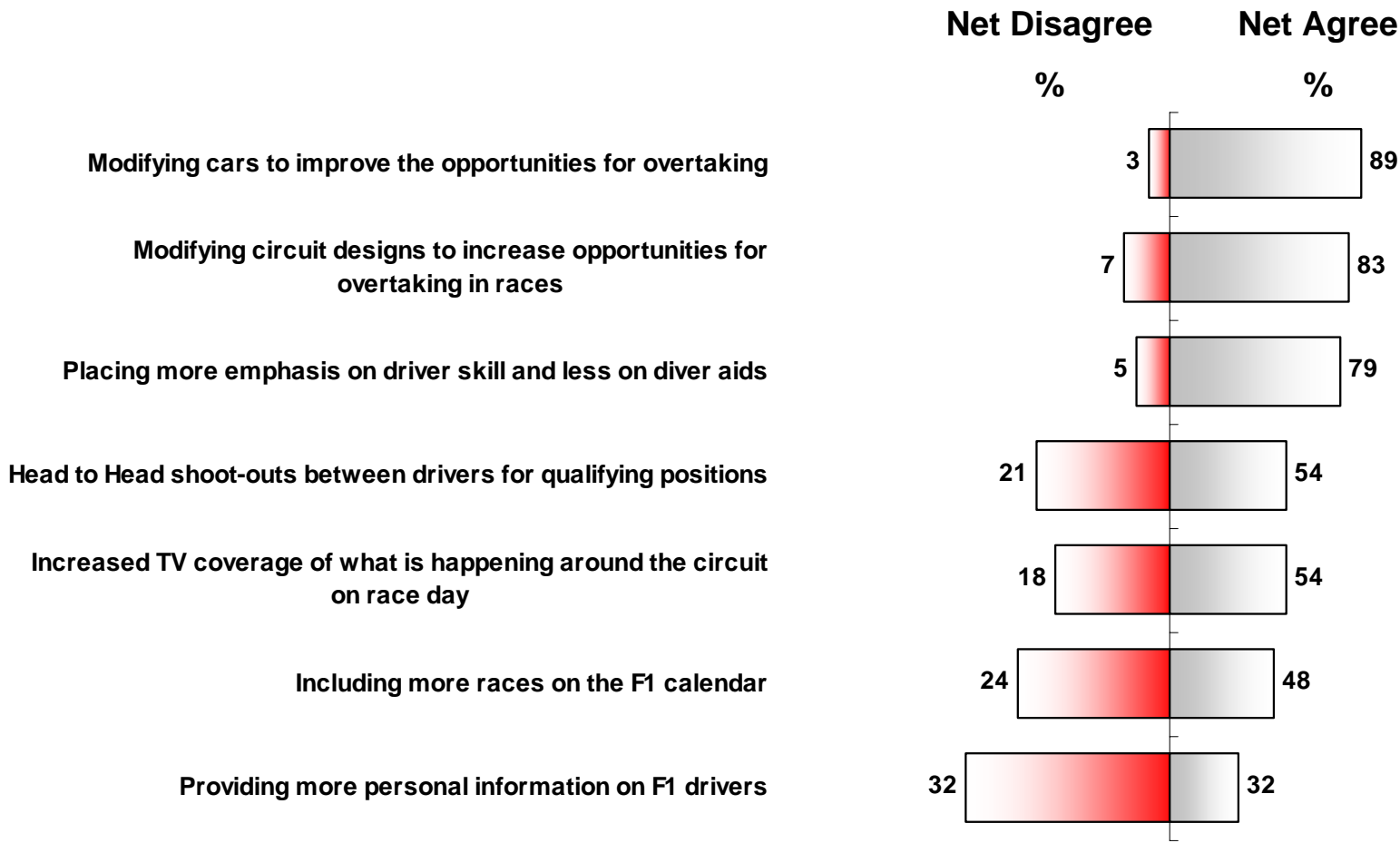
Future Aspects

Summary Points

- Improving opportunities for overtaking, whether through modifying cars or circuits, was seen to be the most likely measures to make the sport more exciting for fans
 - Modifying cars – 89% agree
 - Modifying circuits – 83% agree
- Seventy-nine percent of fans also believed that placing greater emphasis on driver skill and less on driver aids would also improve the excitement F1.

Future changes

Improving overtaking opportunities and a greater emphasis were seen by fans to make the sport more exciting

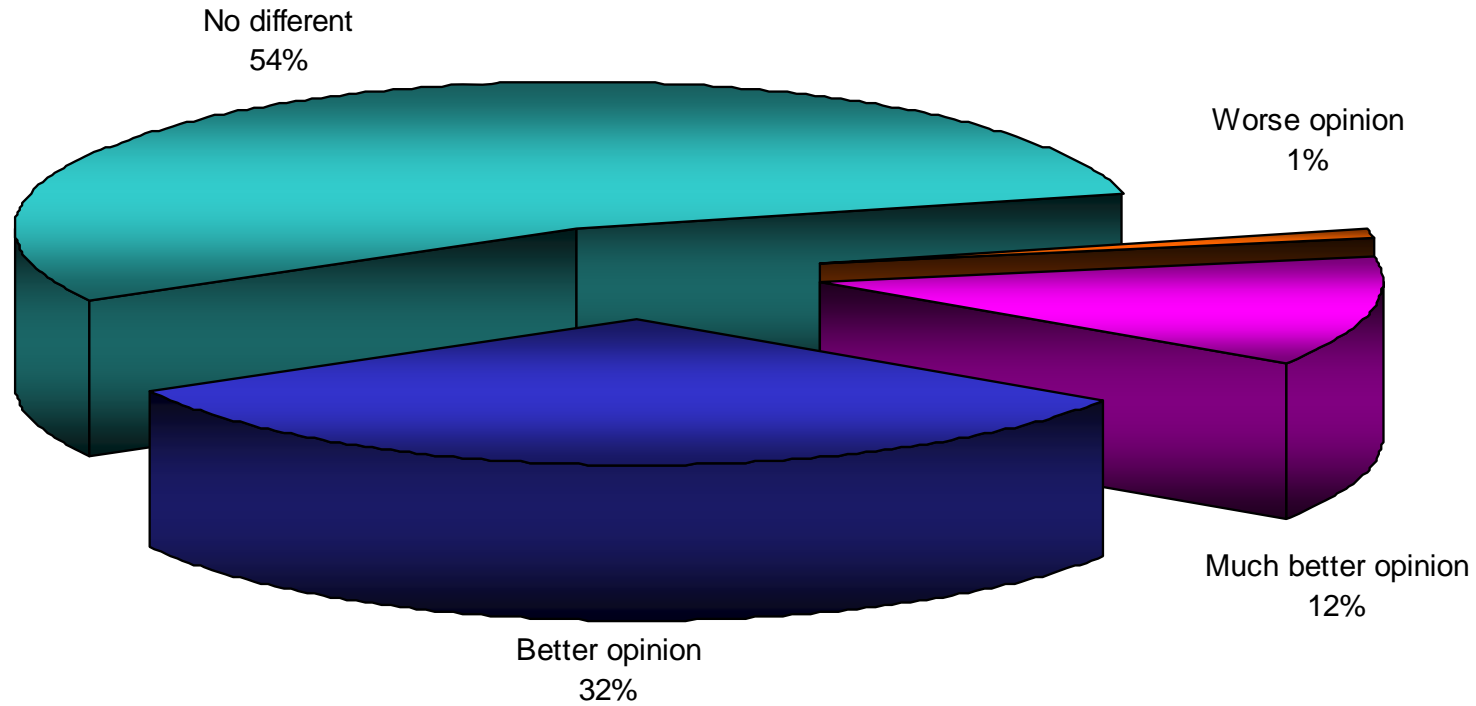


Q35: In your opinion, how strongly do you agree or disagree that the following changes in the sport will make it more exciting for fans?

Base: N=91,834

Sponsor disposition

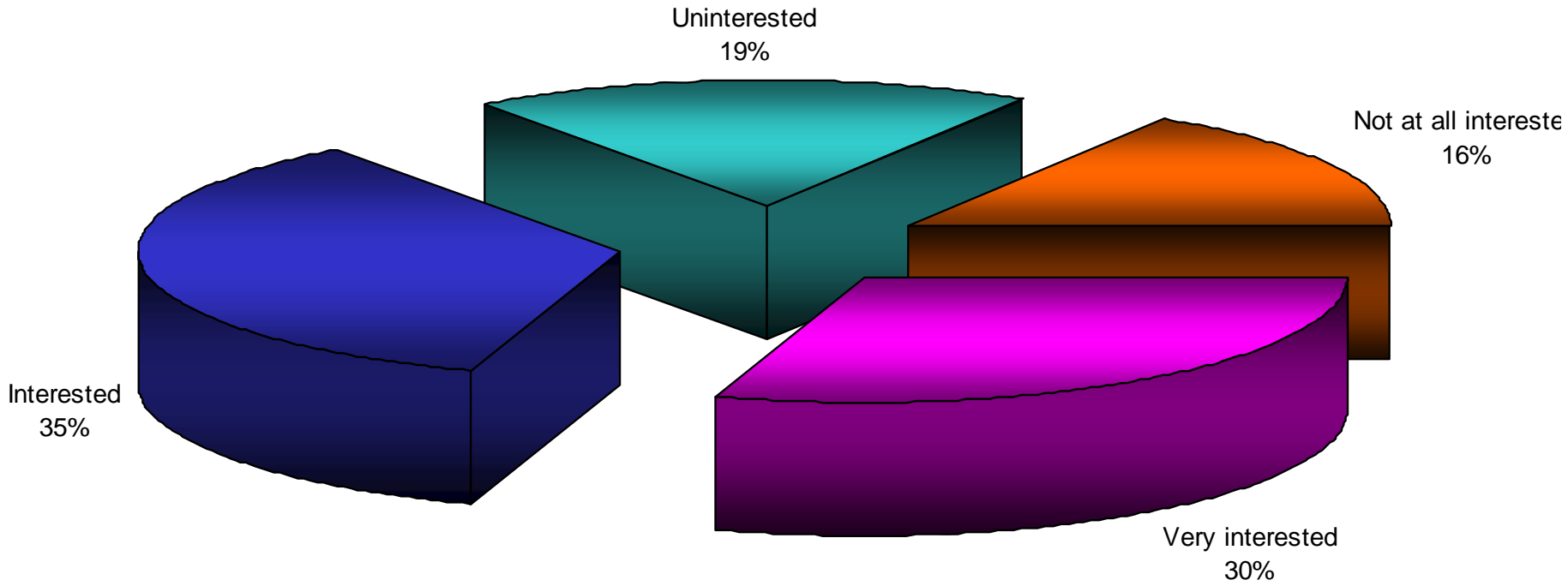
Overall, a third of fans have a better opinion of F1 sponsors



Q34: How has your opinion of brands or companies changed as a result of their involvement with F1?
Base: N=91,834

Interest in a F1 interactive game

Two-thirds of fans had some interest in a F1 interactive game



Q36: How interested would you be in an F1-based interactive game?
Base: N=91,834

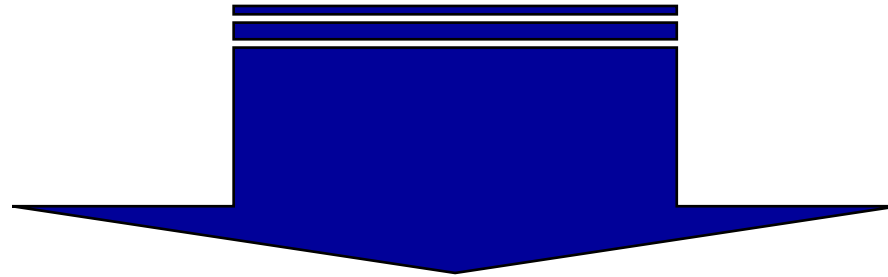
Key Findings and Implications



Formula One's health indicators remain strong

Formula One is clearly a healthy sport with fans engagement with the sport remaining extremely high:

- 9 in 10 fans are either extremely or very interested in the sport.
- More than half have an extremely strong preference for watching F1 in comparison to other sports
- 77% claim they will watch all 18 races this season, demonstrating high commitment to the sport



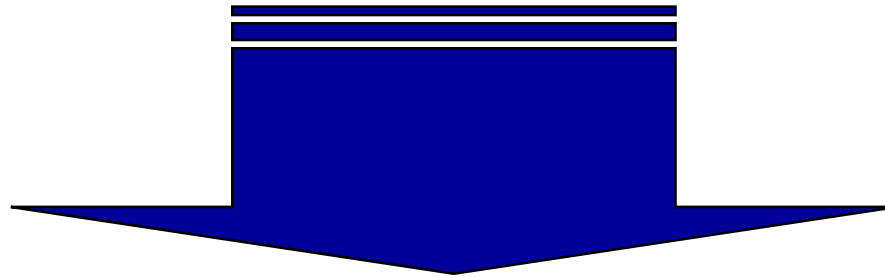
- Formula One is an important part of fans sport viewing repertoire. With strong **interest** and **preference** in the sport among fans, Formula One is in a strong commercial position.
- From a commercial standpoint, the sport continues to provide a strong platform for brands to establish and develop the consumer-brand relationship. Fans interest across the season coupled with their appetite for wider coverage, provide the opportunity for brands to exploit their investment in the sport.

Racing is at the heart of fans interest in the sport

Fans held strong and positive perceptions about the sport and its values – over 80% agree that F1 is the pinnacle of motor sport and for two-thirds it was extremely important that F1 maintained this positioning

High speed, overtaking and an emphasis on driver skill are central to Formula One and of extreme importance to fans.

Just over half of fans agreed that F1 has the right balance between technology and skill.

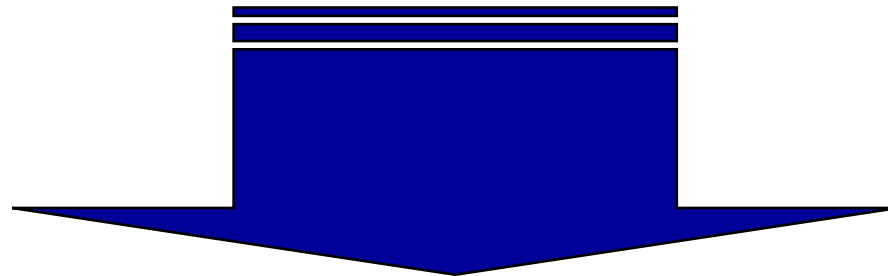


- Overwhelmingly, the challenge for Formula One remains competitive racing, more specifically, finding the balance between the intensity of racing and use of advanced technology in the sport.
- The on-going management of the balance between technology and skill – i.e. getting more fans to agree that the balance is right - also represents a critical challenge for the sport

New Media provides an opportunity for greater consumption of the sport

Outside of TV, the internet is a key touch point for F1 fans with 87% claiming that they stay informed about F1 through this channel.

Generally fans were open to new media channels and content, particularly online content such as on-board camera and timing information that brought fans closer to the race environment



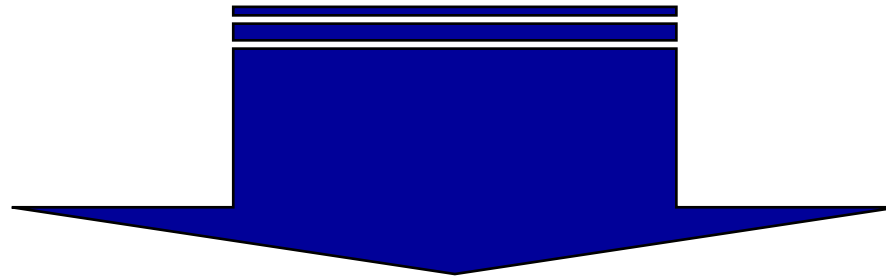
- There is a strong opportunity for Formula One to strengthen its position by developing its offering to fans, particularly through internet based subscription services which provide a platform for fans to increase their consumption of the sport.
- F1 has a clear direction to engage fans in an interactive and tailored way - fans desire a greater width in coverage specifically, race footage and information that puts them in the race action.

The new qualifying format has revitalised fan's interest

49% of fans agreed that racing is more competitive than it was last season.

The new qualifying format has been a strong success for F1. Fans believed that qualifying had improved, was more exciting and importantly, were watching more qualifying than they did last season.

Fans are divided about whether the sport has become too safe.



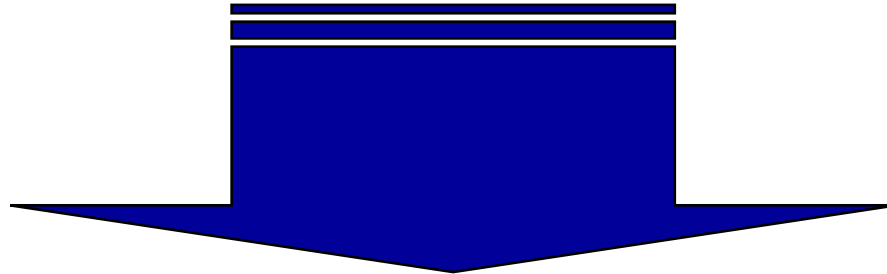
- There is a positive recognition among fans that new innovations, such as phase 3 of qualifying, have improved the excitement and competitiveness of F1.
- Any new regulations or innovations in the sport need to address (and find a balance between) the fundamental aspects of excitement for fans and their likely impact on competitive racing.

Technology provides an opportunity to bring fans and F1 closer together

Fans have a strong connection with the advanced technology aspects of the sport.

Although not the most exciting aspect of the sport to fans, there is strong recognition of the important role that technology plays in the sport – 73% claiming that F1's use of advanced technology sets it apart from other motor sports.

Fans have a thirst for more knowledge of the technical aspects of the sport and believe that those closest to the technology, drivers and team engineers are the best people to speak to them about technology.

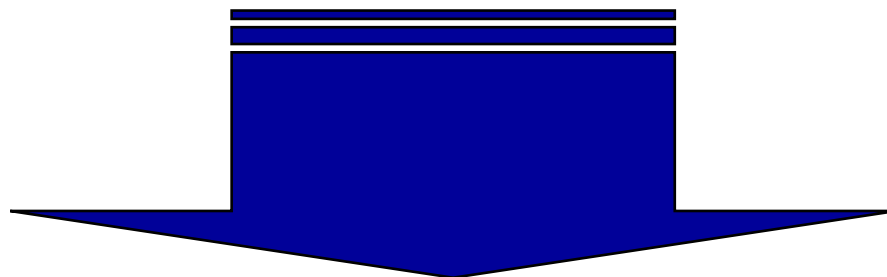


- F1 can use fans strong interest in the technical aspects of the sport to engage fans more broadly in the sport, and outside of race coverage.
- It is also an opportunity to bring teams and drivers closer to fans – potentially fans could see their favourite driver/team talk to them about the technology
- It is important that an 'expert' voice is used in the delivery of that information.

Maintaining competitive racing remains critical to F1's future success

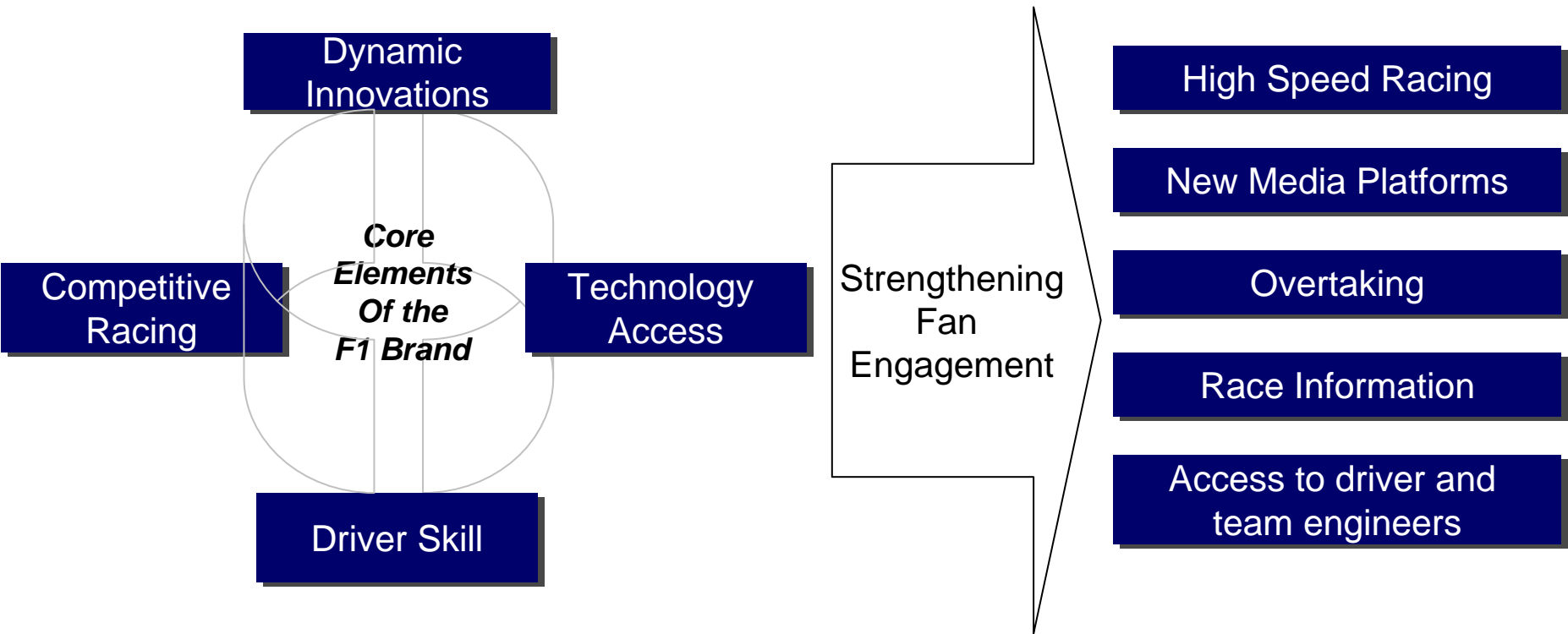
Fans wanted to feel closer to the action and had a clear desire for coverage that put them in the race. Increased use of race information and greater access to drivers and team engineers are key elements.

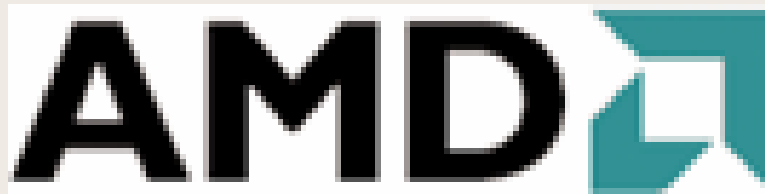
In the eyes of fans, modifying cars or circuits to improve opportunities for overtaking are the essential ingredients in making the sport more exciting for fans



- As highlighted, excitement for fans and competitive racing are the fundamental ingredients in maintaining a healthy sport.
- The sport has a clear mandate from the its fans to strengthen their engagement with the sport. New regulations and changes that focus on improving opportunities for overtaking in races combined with wider access to race information in F1 coverage will have the greatest impact in terms of strengthening F1's relationship with fans.

The Formula One DNA





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