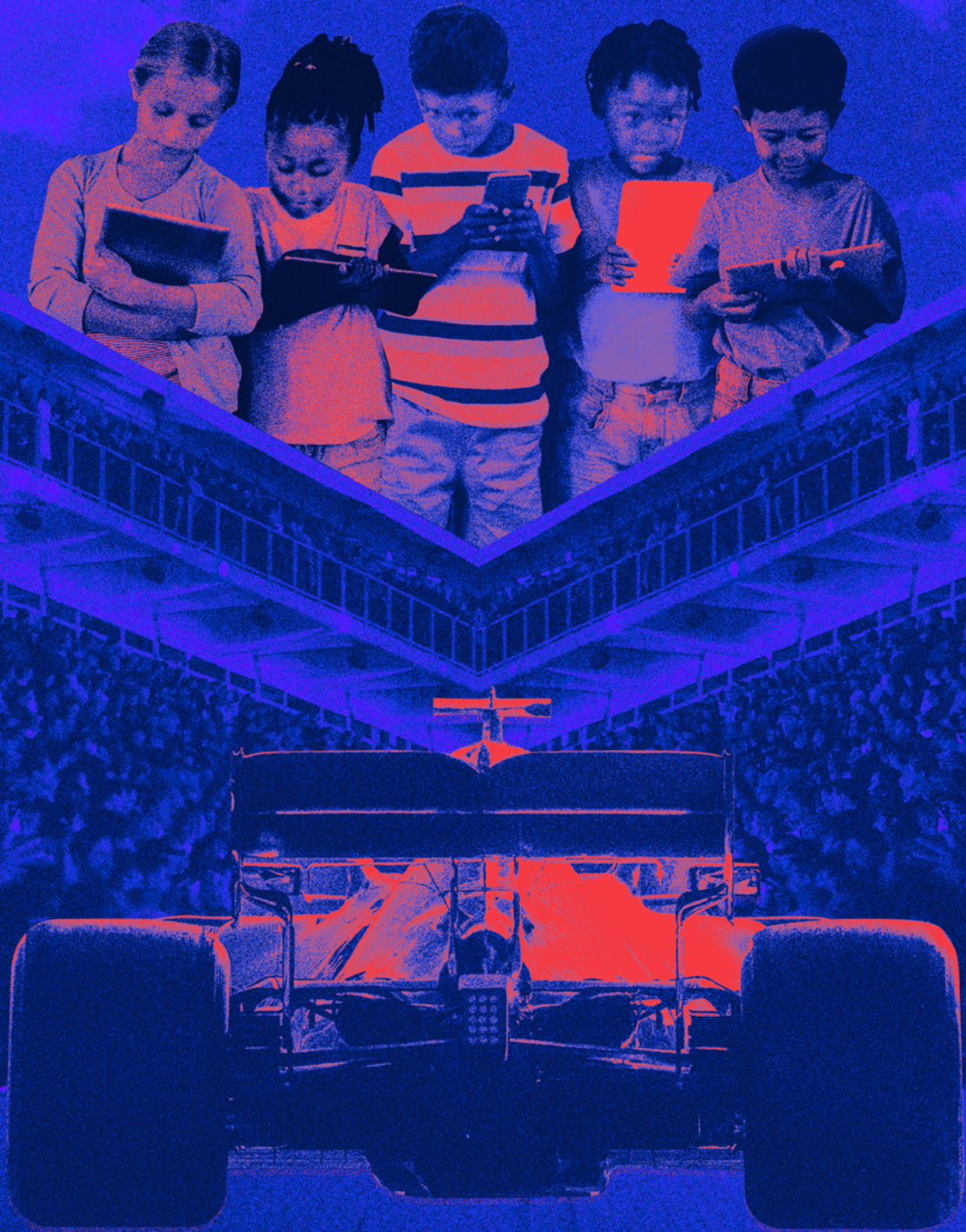


# DRIVING ADDICTION

## A RACE FOR FUTURE GENERATIONS

HOW F1 AND BIG TOBACCO MARKETING  
ALIGN TO RECRUIT YOUNG CONSUMERS



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**The “Driving Addiction” series has highlighted how the tobacco industry uses Formula One (F1) to reach the sport’s fans, especially the younger enthusiasts the sport has worked to attract. This report illustrates how the sport’s rights owners and Big Tobacco are chasing the same markets and demographics for business growth, meaning their interests are aligned. Public health is the loser: With F1 Kids—a live, worldwide broadcast for the sport’s youngest fans, featuring youth commentators and cartoon avatars—Big Tobacco reaches even children with its branding.**

British American Tobacco's (BAT's) brands feature in F1 Kids content, countering global efforts to protect children from tobacco industry marketing that may draw them into future addiction and poor health. The service is being expanded to cover more races in 2024,

a worrying development given the sport’s massive growth has included a surge in young fans, with more than 4 million American and European children between the ages of 8 and 12 reportedly following the sport.

There is no clearer demonstration of the gulf between the stance of F1’s governing body, the Fédération Internationale de l'Automobile (FIA), 25 years ago—when it said it would end tobacco advertising in the sport—and the consequences of that promise never being fulfilled.

BAT and Philip Morris International (PMI) are spending an estimated \$40 million to reach F1’s audiences in 2024. F1 is helping them reach a more diverse global audience, over more channels than ever before—even with their cigarette brands.

## Aligned Business Agendas

The tobacco industry has long recognized it needs to recruit new customers, as more than half of its consumers die from tobacco use or quit. As more countries implement strong measures to reduce smoking, the industry's strategy has evolved to also hook customers globally on nicotine pouches and electronic tobacco and nicotine products. Yet the industry still seeks to grow cigarette sales, especially in countries across Africa, Asia, Eastern Europe and the Middle East. Tobacco companies often use channels popular with youth to recruit their new customers.

Liberty Media owns the rights to the sport. It, too, has embarked on a concerted effort to grow F1's audience. Races have been introduced in Asia, Eastern Europe, the Middle East and the Americas to appeal to a more global audience. The traditional fanbase of older European and Latin American men who watched broadcasts on TV is on the decline as younger fans from Africa, Asia, the Middle East and the United States make up a growing segment of the fanbase. The sport has also worked to broaden its appeal among women, families and younger audiences, while delivering content across a wider range of platforms—as we see with F1 Kids and Netflix's "Drive to Survive" docuseries.

When it comes to where they target new customers and what those customers look like, the tobacco industry and F1's interests are clearly aligned. Both want to hook new generations on their respective products, for profit—and where F1 content is available, tobacco company branding is there, too. Since our last report, two key developments are particularly worrying for public health: the growing availability and promotion of historic race footage featuring pervasive cigarette branding and the deliberate targeting of ever-younger children by Formula One's rightsholder.

## Younger Audiences, More Channels

Formula One has experienced a dynamic transformation of its fanbase over the past decade. Research by Nielsen found in 2019 that 62% of F1's new fans were younger than 35. This is changing how F1 content is consumed. Newer fans tend to watch F1 on social media and streaming channels and may not even see traditional race broadcasts. The majority of the sport's followers on TikTok and 40% on Instagram are now under 25 years old.

This means F1 is an increasingly ideal platform for tobacco companies' promotions as they drive to attract new, young customers with "cool" products.

A new partnership between Formula One's rightsholder and LEGO may further expand or reinforce youth interest in the sport, with the world-famous toy company announcing that some of its F1 sets will be part of the Duplo range, geared toward preschoolers.

The number of places F1 can be seen is also on the rise: The sport has almost 10 times more social media followers than it did in 2016; "Drive to Survive" remains popular, hitting Netflix's Top 10 in a record 61 markets in 2024; a miniseries on the life of Brazilian legend Ayrton Senna will launch on the streaming service in 2024; and there is an F1-themed movie starring Brad Pitt set for release in 2025. The latter follows on the heels of 2019's "Ford v Ferrari," 2023's "Ferrari" and several documentary productions, indicating ongoing cinematic interest in motorsport as well as interest among wider audiences.

Through the race season, BAT's branding reaches F1's 1.5 billion-strong TV audience primarily through broadcast coverage, while PMI hosts corporate hospitality events to woo policymakers, media and other influential guests attending races.

In addition to branding for BAT's electronic cigarettes and nicotine pouches, both companies' cigarette brands are increasingly visible as F1 increases its use of historic footage, particularly from the decades when cigarette sponsorship was endemic. These ads can be viewed both in marketing and as programming available on its app.

With a race on the Las Vegas strip debuting in 2023 and China returning in 2024, this year's calendar has a record 24 races. F1 is more global than ever. The big question now: Where will it move next? Countries in Southeast Asia have shown great interest, according to Greg Maffei, CEO of Liberty Media,<sup>1</sup> which owns the Formula One Group and the sport's commercial rights. Africa presents another prospect, with Formula One Group CEO Stefano Domenicali and seven-time champion Lewis Hamilton both outspoken on their desire to see F1 return to the continent. These regions are key markets for tobacco companies.

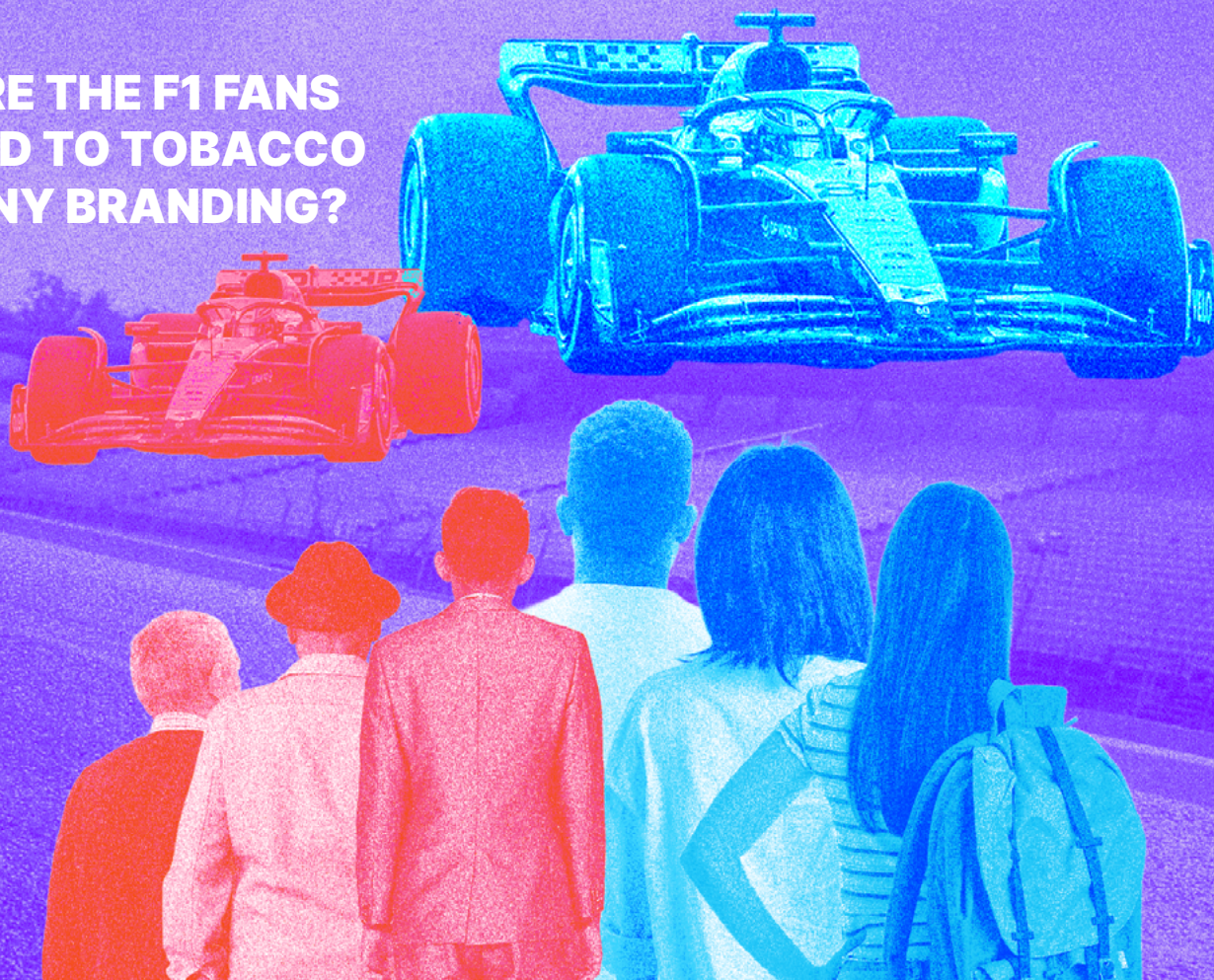
## The Future of Addiction

Formula One's rightsholder is working to attract and embed F1 within an ever-younger global audience, delivering its content via multiple channels so it's available anywhere, anytime—and in immersive formats like gaming, documentaries and dramas. This makes F1 the perfect vehicle for tobacco companies to get their brands and messages in front of young potential customers. It's clear why BAT and PMI are spending so much on the sport. Arguably, BAT's sponsorship in particular is bringing significant exposure to its brands.

It's been 20 years since F1 was supposed to quit Big Tobacco, after generations of F1 fans had been exposed to race cars that resembled rolling packs of cigarettes. With F1's broader reach and rapidly diversifying fanbase, millions of boys and girls will be exposed to advertising for the industry's products over the next 20 years if F1 doesn't snuff out tobacco company sponsorship. If the sport will not act, it's up to regulators to protect children and youth from F1 and the channels that broadcast and promote it.

In total, tobacco companies have spent an estimated \$4.6 billion on F1 over the past 57 seasons. That shows no sign of stopping. The investment continues to deliver.

## WHO ARE THE F1 FANS EXPOSED TO TOBACCO COMPANY BRANDING?



**Formula One has experienced a dynamic transformation of its fanbase over the past decade. The typical new F1 fan is younger, more diverse, more likely to be female and comes from regions such as the United States and Asia, where previously the sport had been less popular.**

A survey in 2021 found around 34% of fans had been following the sport for fewer than five years.<sup>2</sup> In 2017, when the survey was previously conducted, only 12% of fans fell into this category, suggesting the sport is reaching new, younger fans. This is exactly the audience PMI and BAT are keen to attract.

### **Billions of Global Viewers**

F1 is often referred to as the world's most-watched annual sporting event, making it a valuable platform for brands looking to reach an international audience, such as tobacco companies. F1 reported a global cumulative TV audience of 1.5 billion in 2023. Although this is lower than a few years ago, it still represents huge viewership in an era when TV audiences are dwindling in contrast to online media—and, of course, younger F1 followers may access content on online platforms instead.

The size and global reach of the audience mean F1 attracts some of the world's biggest companies wherever races are held. Top executives visit each race, and thousands of sponsors' guests experience Formula One's hospitality, including a significant number of VIPs and celebrities from the worlds of art, sport, showbusiness and politics. It is an attractive platform for tobacco company marketing and lobbying activities.

## F1'S Global Cumulative TV Audience 2017-2023

Year	Viewers
2017	1.4 billion
2018	1.76B
2019	1.9B
2020	1.5B
2021	1.55B
2022	1.54B
2023	1.5B

Source: Formula One

## Increasing Global Reach

The sport's new, younger, more diverse fans come from around the globe, including from countries like the United States, where the sport used to be less popular. The 2021 global fan survey saw a significant uptick in responses from Asia-Pacific, the Middle East and Africa. The share of European fans was at its lowest percentage ever—57% of the sample, compared to 63% in 2017. Responses from Asia-Pacific, Africa and the Middle East now account for 21% of fans, more than doubling the 10% registered in 2017.

A 2023 survey by YouGov<sup>3</sup> found that F1 was most popular in South America, where 40% of consumers expressed an interest, followed by the Middle East and North Africa at 32% and Asia-Pacific at 29%. Europe was fourth at 27%. F1 helps tobacco companies reach consumers in these growth regions, particularly in countries with more lax tobacco control, while countries in Europe and elsewhere pass increasingly restrictive legislation on tobacco products.

## Appealing to Younger Audiences

The typical F1 fan was once a European or Latin American man in his 40s or 50s who tended to fuel his passion by watching race broadcasts on TV. F1's most recent official data indicates it's been successful in attracting a younger fanbase, particularly following the expansion of social media operations and the launch of "Drive to Survive." Matt Roberts, then-F1's research and analytics director, said in 2019 that

"14% of F1 TV viewers are under 25, although that's in line with the global population. ... In fact, F1 has the greatest proportion of under-25s of all global sports leagues (with the exception of the National Basketball Association [NBA])."<sup>4</sup>

In addition to the millions of children watching in the United States and Europe, F1 claims huge percentages of its TikTok and Instagram audiences are younger than 25. Data compiled by Nielsen confirmed that of F1's 500 million fans (across 27 markets), 62% of new fans accumulated in the last two years were under the age of 35,<sup>5</sup> while the global fan survey in 2021 recorded its youngest-ever sample, with 34% of fans aged 16-24 (up from 26% in 2017) and 62.9% of fans aged 16-34. Their average age was 32, compared to 50 for the United States' National Football League and 37 for the NBA's TV audience.

With tobacco companies targeting youth and young adults to replace their older cigarette customers and attract a new generation to electronic products and nicotine pouches, this likely increases the allure of F1 sponsorship.

## Interest Among Women on the Rise

Formula One fans are still predominantly men, but more women have been showing an interest in the last few years. Maffei, Liberty's CEO, reported in 2023 that the number of women among F1's new fans was 40% higher than in its existing fanbase.<sup>6</sup>

The 2021 global fan survey recorded its highest-ever female participation at 18.3%, compared to 10% in 2017. This was a 177% increase over 2015. In the Middle East and Africa, as many as 25% of respondents were women.

"Drive to Survive" has been cited as a major factor in the changing demographic. According to Mexico City Grand Prix president Alejandro Soberon, the docuseries encouraged more women to attend the race, leading to a 30% increase in female interest.<sup>7</sup> This is a particularly attractive demographic for the tobacco companies, which are often reported to be targeting young women for business growth, as tobacco use historically has been lower among women than men.

## 03

### LATEST FRONTIERS IN MARKETING TOBACCO TO F1 FANS



**Digital media has been at the heart of F1's expansion in recent years. Once a TV sport, fans are now increasingly likely to access news and footage through social media, streaming services and the F1 app. These platforms transmit images of tobacco branding to fans across the world. As younger, more diverse fans take interest in F1, the sport and Big Tobacco are finding innovative ways to reach them.**

#### **F1 Kids**

One might expect that an experience aimed at children would be the least likely place to find tobacco branding. However, that is not the case. In 2023, the sport's rights holder launched F1 Kids, "a brilliant way to engage children in Formula 1," according to F1's director of media rights and content creation, Ian Holmes.<sup>8</sup> It featured three races in 2023 and has expanded to add another seven in 2024.

At least three races featured on F1 Kids in 2024 had BAT branding on the McLaren cars (the Saudi Arabian Grand Prix, Monaco Grand Prix and British Grand Prix), and the Abu Dhabi Grand Prix also featured BAT branding in 2023. The Abu Dhabi race that will end the 2024 season in December is also likely to feature BAT branding. Of the other races featured on F1 Kids, Sao Paulo and Singapore were both tobacco-free in 2023, while in 2024, the McLaren cars featured logos for a BAT retail partner at the Singapore Grand Prix.





Clips from F1 Kids advertise a website for Velo nicotine pouches, displayed on the McLaren car's halo. Source: F1 YouTube channel

The children's program is available through the F1 TV app, with a press release explaining it "will be available to broadcasters around the world via a live dedicated international feed of the Grand Prix."<sup>9</sup>

The concept involves young presenters providing live commentary and analysis at select F1 races. The broadcasts feature child-friendly team radio transmissions, simple technical explanations to help children understand what is happening and bespoke colorful graphics, including cartoon avatars of the drivers.



Driver Lando Norris' cartoon avatar pumps his fist during an F1 Kids broadcast. Source: F1 YouTube channel

F1 Kids uses the standard live feed of the race, which features not only tobacco brands—but also advertising for alcohol and gambling companies. The image to the left was taken from an 8-minute highlights package of the F1 Kids' British Grand Prix programming on F1's YouTube channel.<sup>10</sup> It is one of several instances in the short video that prominently feature BAT's Velo nicotine pouch brand while directing viewers to Velo's website.

The description of the video invites viewers to "sit back and enjoy all the best bits from our F1 broadcast for children at Silverstone, with the aim of inspiring the next generation of F1 fans!" The "sit back and enjoy" language echoes decades of tobacco advertising, potentially priming younger audiences to this common messaging tactic from the industry.

According to F1's rightsholder, the sport's massive growth includes a surge in young fans, with more than 4 million American and European children between the ages of 8 and 12 following the sport, "while 54% of followers on TikTok and 40% on Instagram are now under 25 years old."<sup>11</sup>

## LEGO

Next year, F1 will partner with the popular toy company, which plans to launch a line "of F1-inspired LEGO products for builders of all ages" and "products that celebrate the sport's engineering and technical heritage." This will include DUPLO sets for preschool children. LEGO says it will also share F1 content on its digital platforms and maintain a strong presence at races, "with fun fan zone activations throughout the season."

Driver Lando Norris, who took part in a 2022 LEGO promotion with then-McLaren teammate Daniel Ricciardo,<sup>12</sup> drives one of the two cars still displaying tobacco company branding today. LEGO sells a replica version of his car without the BAT branding, but attracting young LEGO fans to McLaren will lead to exposure to BAT brands in other media. LEGO has partnered with McLaren since 2015, and in September 2024 Norris took to the Silverstone Circuit in England in a 1:1 replica of a McLaren production vehicle made of LEGO bricks. The marketing stunt spurred stories in major publications, including *The New York Times*,<sup>13</sup> *Car and Driver*,<sup>14</sup> *The Gulf Daily News*,<sup>15</sup> *TimesLIVE*<sup>16</sup> in South Africa and *The Telegraph*<sup>17</sup> in India.

The replica was not an F1 car and bore no BAT advertising. However, the partnership may draw younger fans to F1 content, where they will be exposed to Norris' and his teammate's BAT-branded cars as they zip around the track—and, potentially, historic F1 content advertising cigarette brands.

As this report was finalized, Formula One announced a multi-year deal with another leading global toy company, Mattel Inc. The Hot Wheels toy car line included in the F1 partnership is sold in more than 150 countries and was the No. 1 item sold among all toys globally, Mattel’s press release claims.

### Social Media

Social media coverage has grown rapidly in recent years. Liberty Media’s efforts to improve F1’s digital presence have paid off, and Formula One claims it had 70.5 million followers in 2023, a 43.6% increase over 2021, covering Facebook, Twitter, Instagram, YouTube, TikTok, Snapchat, Twitch, Weibo, WeChat, Toutiao and Douyin. This is not counting teams’ and drivers’ considerable social media presence.

In 2023, its social media followers were almost 10 times what they were in 2016. In 2021, F1 was the fastest-growing major sport online. The interest is ongoing, and the first post on the Las Vegas Grand Prix’s new TikTok account in February 2023 had more than 535,000 views in its first 24 hours.<sup>18</sup> It has been liked roughly another 1 million times since then.

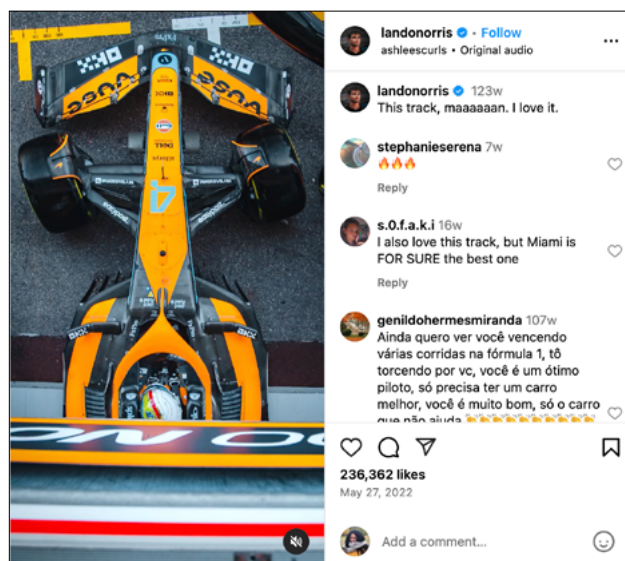
### F1’S Social Media Followers 2016-2023

Year	Number of followers
2016	7.7m
2017	11.9m
2018	18.5m
2019	25.7m
2020	35.0m
2021	49.1m
2022	61m
2023	70.5m

Source: Formula One

This means BAT logos on the McLaren cars and other tobacco branding shown in historic footage are broadcast to a large and diverse online audience. Considering McLaren’s recent streak of success, the team—already highly active on its own social media accounts—dominates social media coverage at some events.

Team social media feeds further increase the level of exposure. At the beginning of September 2024, McLaren had 13.8 million followers on Instagram, 5.5 million on TikTok, 4.3 million on Facebook, 4.1 million on X and 2.5 million on Threads, as well as 1.3 million subscribers on YouTube. Images and video clips posted on the accounts regularly show branding on the cars for BAT’s products and partners. Norris and Oscar Piastri also post photos of their cars bearing tobacco advertising to the millions of followers on their personal social media accounts.



Norris posts photos of his tobacco-branded McLaren for his more than 9 million Instagram followers. Source: Instagram

At the Miami Grand Prix in May 2024, Norris took his first F1 victory at the wheel of a Velo-branded car. Norris’ win featured on news broadcasts, websites and social media posts around the world, but that wasn’t the only reason McLaren was in the spotlight.

One of the VIPs in attendance was former U.S. President Donald Trump, who briefly toured the McLaren garage before the start of the race. An image posted on the Truth Social platform congratulating the team on its victory<sup>19</sup> gained 17,400 likes, plus another 284,000 when reposted on his Instagram account. It was also heavily reposted by users on X.

Although not central to the image, the airbox of the car featured a small Velo logo. A Getty Images photo of Trump in the team's garage, showing a partial Velo logo front and center, was featured in publications around the world, including the Daily Mail,<sup>20</sup> MSN<sup>21</sup> and The Daily Star.<sup>22</sup>

## F1, McLaren, Influencers and Instagram: BAT's Race to Reach Young Audiences in Indonesia

Tobacco companies have long used Formula One to market their products, especially in countries with lax tobacco control laws. STOP has analyzed how BAT leverages its F1 sponsorship to promote its electronic cigarette brand, Vuse, in Indonesia.

The Tobacco Enforcement and Reporting Movement (TERM) examined BAT's social media activity in Indonesia, finding that it uses Instagram most frequently. Instagram is more popular in Indonesia than Facebook or X, especially with younger users.

Vuse Indonesia's main Instagram campaign uses the hashtag #BebaskanHebatmu, or #FreeYourGreatness, and appears to be aimed at young, creative audiences. The account heavily promotes BAT's partnership with McLaren, with at least 21 examples between November 2023—which marked the end of the 2023 season—and May 2024, three months into the 2024 season, TERM found.

Content includes images of McLaren cars, Vuse X McLaren merchandise and interviews with creators who are part of the "Driven by Change" residency, where artists are selected to design helmets or special car liveries for specific races, among other artistic endeavors.

In addition to posts applauding the McLaren team's performance and inviting followers to tune in for races, there are competitions, for example, offering the chance to win a co-branded Vuse X McLaren hoodie, hat or lanyard for those who post the correct answer to a quiz, tag friends, like the post and follow Vuse Indonesia. Thus, the appeal of F1 may lure Instagram users into following the Vuse account, where they will be exposed to more BAT advertising.

Posts included the hashtag, #DrivenByChange, a tagline BAT uses globally to market its risky products, especially in the art, sports and gaming communities—many members of which, like F1's newer fanbase, tend to skew young.

One post declared, "From Jakarta to Japan, inspiration is always with you," urging users to follow @Ramengvrl, an Indonesian influencer with 234,000 followers, and artist @Popomangun, who has 51,000 followers, on their "journey with Vuse on vuse.indonesia!"

Other posts highlighted the work of Saudi artist Nujood Al-Otaibi, who designed a helmet for the McLaren team, and MILTZ, a Japanese artist who designed McLaren's livery for the Japan Grand Prix.

BAT and McLaren often select artists in cities or countries with large F1 fanbases or where races are held. Ramengvrl and Popmangun appeared at events surrounding the Japan Grand Prix, where BAT was promoting its Vuse brand. Ramengvrl also collaborated on a music video with a Malaysian rapper, which was featured on Vuse Indonesia's Instagram account.

As BAT works to expand its customer base by hooking young users on risky new products, F1's willingness to let Big Tobacco co-opt its increasingly young fanbase provides an ideal forum for addicting another generation of users.

## The F1 TV App

Since 2018, the broadcast app F1 TV—an “over-the-top,” or OTT, streaming platform, allowing users to view multiple feeds and screens simultaneously—has enabled fans to watch not only footage and analysis of current F1 races, but also an archive of races from 1970 to the present day that had not been previously available. Thus, the app exposes old and new F1 fans to cigarette advertising, giving tobacco companies free exposure today for past sponsorship deals.

Tobacco sponsorship was prevalent in the sport until 2006, and just a glance at the thumbnails representing each season on the archive's homepage<sup>23</sup> shows brands including Marlboro, West, Rothmans, Camel and John Player Special. Documentaries<sup>24</sup> on the history of the sport available on the app feature tobacco-supported teams and drivers such as Ayrton Senna, Mika Häkkinen, Jacques Villeneuve, Nigel Mansell, Niki Lauda and Lotus. F1's rightsholder does not disclose the service's exact number of users, but its 2023 year-end financial results hailed “continued growth in F1 TV subscription revenue.”<sup>25</sup>

This resurgence of cigarette advertising in F1 defies the spirit of a global health treaty that the sport said it was committed to honoring, as well as national tobacco advertising bans that aim to protect the public, especially children and young people.

## ‘Drive to Survive’

Since Netflix started publishing audience statistics in 2021, “Drive to Survive” has featured in its Top 10 programs during its launch week for each of the three relevant seasons (for more on the series' ratings, see Appendix 1). McLaren and its drivers are a popular component of the series, and BAT branding is frequently shown in the footage.

Season 4, which launched in 2022 but followed the previous year's action, also showed PMI's Mission Winnow branding on Ferraris, and historic footage has featured cigarette branding. The series regularly features in the Top 10 programs in countries in the Middle East and Africa, as well as India—key target markets for tobacco companies.

Data suggests it is growing only more popular. Season 6, covering the 2023 season, was in the Top 10 in 61 markets worldwide in its second week, a record that surpassed the 55 markets in which Season 4 featured during week two. “Drive to Survive” has been renewed for a seventh season, which will launch in early 2025 and is likely to heavily feature BAT branding due to McLaren's success in 2024.

## Dramatic Programming

It is feared that two upcoming dramatic productions will feature tobacco branding: Apple TV and Warner Bros' “F1” movie and Netflix's “Senna” limited series. Due to debut in November 2024, Netflix's biopic of Senna, the three-time world champion, has Marlboro logos removed from promotional posters, but they appear on cars and advertising hoardings in the trailers promoting the miniseries. It is expected the branding will remain in the final version of the series.

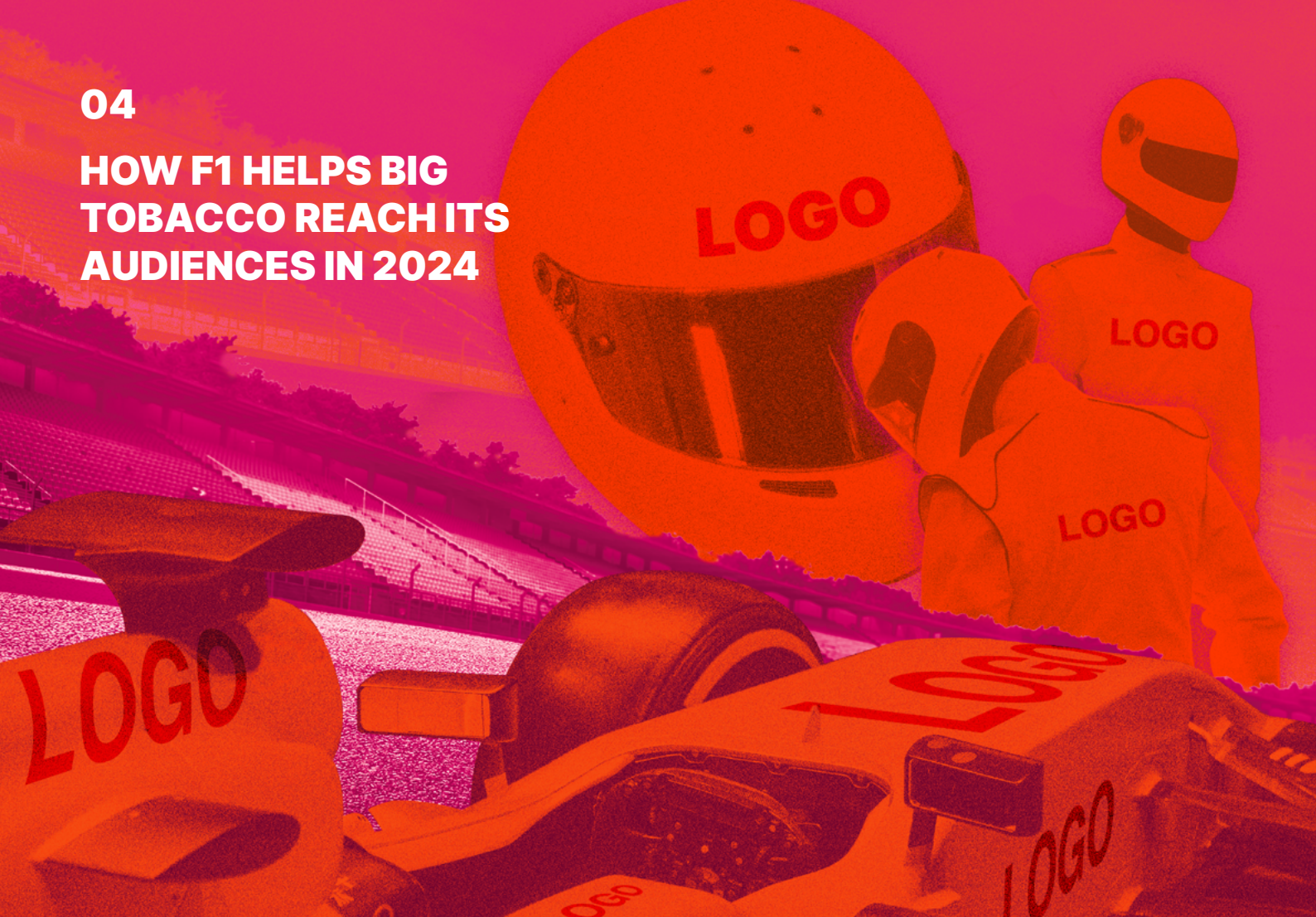


A trailer for ‘Senna’ shows cigarette branding on the Brazilian driver's car. Source: Netflix

The trailer for “F1,” starring Brad Pitt and due to release in June 2025, did not show any tobacco branding. However, the production was filmed using actual F1 cars and drivers during the British Grand Prix, where the McLaren vehicles carried Velo branding.

## 04

# HOW F1 HELPS BIG TOBACCO REACH ITS AUDIENCES IN 2024



**There are two tobacco companies in F1 in 2024: BAT, which sponsors McLaren, and PMI, which sponsors Ferrari. They contribute a combined estimated \$40 million to the teams and receive global exposure and networking opportunities in return. Although PMI no longer has branding on the Ferrari cars, it uses F1 races and events surrounding race weekends to showcase the company and its messages to guests (for more on the history of Big Tobacco’s spending in F1, see Appendix 2).**

### **British American Tobacco 2024 Season With McLaren**

Estimated F1 sponsorship spend 2024	\$30 million
Brands	Vuse, Velo
Sponsored team	McLaren
Owner	British American Tobacco

### **BAT Branding at 2024 Grand Prix**

BAT’s branding underwent a significant reorganization in 2024. The large logo on the cars’ sidepods, which had been the most prominent in previous years, was replaced with two medium-sized logos on the forefront of the sidepod and the airbox. The logos on the front-wing endplate, nose and driver overalls were also lost.

## British American Tobacco Brands Promoted and National Laws in 2024

Country	Brand	Type	Country regulations*
<b>Hungary</b>	7-Eleven	Retail partner	Restricts some tobacco advertising and sponsorships (TAPS). Regulates electronic nicotine delivery systems (ENDS).
<b>Netherlands</b>	7-Eleven	Retail partner	Bans many forms of TAPS. Regulates ENDS.
<b>Australia</b>	OTR	Retail partner	Bans many forms of TAPS. Regulates ENDS.
<b>China</b>	Oxxo	Retail partner	Bans many forms of TAPS. Regulates ENDS.
<b>Austria</b>	Oxxo	Retail partner	Bans many forms of TAPS. Regulates ENDS.
<b>Canada</b>	Sobeys	Retail partner	Bans many forms of TAPS. Regulates ENDS.
<b>Belgium</b>	Tomorrowland/ Love	Festival/Velo alt-branding	Restricts tobacco advertising and sponsorships. Regulates ENDS.
<b>Miami</b>	Velo	Nicotine pouches	Restricts tobacco advertising and sponsorships. Regulates ENDS.
<b>Emilia Romagna (Italy)</b>	Velo	Nicotine pouches	Restricts tobacco advertising. Regulates ENDS.
<b>Spain</b>	Velo	Nicotine pouches	Bans TAPS. Regulates ENDS.
<b>Britain</b>	Velo	Nicotine pouches	Bans many forms of TAPS. Regulates ENDS.
<b>Italy</b>	Velo	Nicotine pouches	Restricts tobacco advertising. Regulates ENDS.
<b>Bahrain</b>	Vuse	Vaping brand	Bans TAPS. Different regulations apply to different ENDS and non-nicotine delivery systems **
<b>Saudi Arabia</b>	Vuse	Vaping brand	Bans TAPS. Regulates ENDS.
<b>Japan</b>	Vuse	Vaping brand	Does not ban TAPS. Bans ENDS.
<b>Monaco</b>	Vuse	Vaping brand	Does not ban TAPS. Regulates ENDS.
<b>Azerbaijan</b>	Vuse	Vaping brand	Bans TAPS. Regulates ENDS.

\*According to the World Health Organization Report on the Global Tobacco Epidemic, 2023

\*\*Bahrain banned e-cigarettes in 2013. Since 2016, electronic nicotine delivery systems and electronic non-nicotine delivery systems under the name of e-shisha have been allowed into the country. In practice, some e-cigarette products, including BAT's Vuse, are imported under the e-shisha categorization.

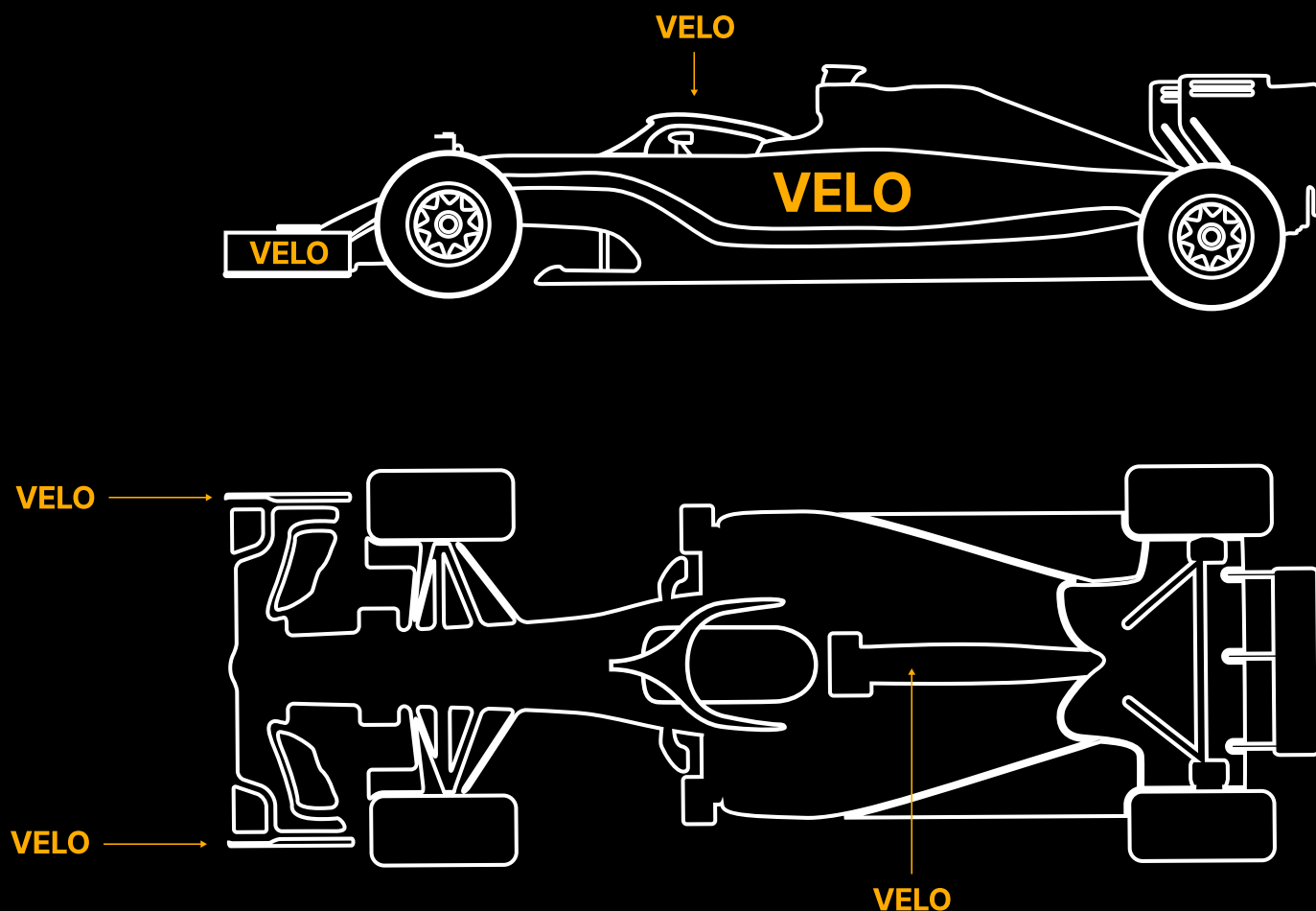
Despite this slightly less-visible branding package, it is believed BAT is still paying around \$30 million annually for the sponsorship because McLaren's recent success means space on the cars' liveries is considerably more valuable than when BAT joined the team in 2019.

Another notable change from 2023 was the return of branding for BAT's retail partners at races where advertising for Vuse or Velo was not permitted. In

the first 18 races of the 2024 season, retail partners OTR, Oxxo, Sobeys, 7-Eleven and The Shilla Duty Free all featured on the car, along with Tomorrowland, a Belgian music festival where BAT promotes and sells its e-cigarettes as a corporate sponsor (cross-promotion efforts included a competition for tickets to both events). In the first 18 races of the season, 10 races featured Vuse or Velo branding.

### Main Logo Locations of BAT Branding (first 18 races):

Large on front wing (three races); medium on front of sidepod; medium on airbox; medium on front-wing endplate; very small on halo.



## Philip Morris International 2024 Season With Ferrari

Estimated F1 sponsorship spend 2024	\$10 million
Brand	Philip Morris International
Sponsored team	Ferrari
Owner	Philip Morris International

PMI is spending an estimated \$10 million annually with the team. What it gets in return is the status of being able to describe itself as a Ferrari partner and host extensive hospitality opportunities with the team. It is unlikely to return soon to the major sponsor status it

previously enjoyed, as its old branding locations are now occupied by other sponsors, including Ferrari's title partner, HP, but it is still one of the longest-standing partnerships in the sport and has now endured for 53 seasons.

## Tobacco-Related Brands in F1 In 2024

Race	Branding locations				
	Front of sidepod	Airbox	Front wing	Endplate	Halo
Bahrain	Vuse	Vuse	Vuse	Vuse	Vuse
Saudi Arabia	Vuse	Vuse	Vuse	Vuse	Vuse
Australia	OTR	OTR	-	OTR	OTR
Japan	Vuse	Vuse	Vuse	Vuse	Vuse
China	Oxxo	Oxxo	-	Oxxo	Oxxo
Miami	Velo	Velo	-	Velo	Velo
Emilia Romagna	Velo	Velo	-	Velo	Velo
Monaco	Vuse	Vuse	-	Vuse	Vuse
Canada	Sobeys	Sobeys	-	Sobeys	Sobeys
Spain	Velo	Velo	-	Velo	Velo
Austria	Oxxo	Oxxo	-	Oxxo	Oxxo
Britain	Velo	Velo	-	Velo	Velo
Hungary	7-Eleven	7-Eleven	-	7-Eleven	7-Eleven
Belgium	Love	Tomorrowland	-	Love	Tomorrowland
Netherlands	7-Eleven	7-Eleven	-	7-Eleven	7-Eleven
Italy	Velo	Velo	-	Velo	Velo
Azerbaijan	Vuse	Vuse	-	Vuse	Vuse
Singapore	The Shilla	The Shilla	-	The Shilla	The Shilla



## How the Dutch are Fighting to Protect Citizens From F1's Tobacco Advertising

The Netherlands has tough tobacco advertising laws, but the tobacco industry still finds ways to promote risky, addictive products to racing fans there.

Months after Dutch lawmakers announced plans in 2023 to ban the sale of nicotine pouches, the McLaren cars of two of the world's most popular F1 drivers took to the Dutch Grand Prix in Zandvoort with ads for British American Tobacco's Velo pouches.

In addition to Velo branding on the halo and front wing, the sidepods of the cars featured the anagram, "Love." A tactic first used at the 2022 Dutch Grand Prix, the "Love" branding is comprised of fans' names, gathered as part of a global BAT/McLaren competition targeting fans on social media.

Dutch health organizations filed complaints with their country's advertising authority, with KWF Dutch Cancer Society director Carla van Gils issuing a strongly worded statement: "The tobacco industry is doing everything in its power to keep young people addicted in order to keep this sickening and deadly business going. ... We find it bizarre that it is allowed to advertise a product that is banned."

Following the 2023 furor, the cars' Velo branding disappeared from the 2024 Dutch Grand Prix. Still, BAT's Vuse and Velo branding appeared on images of the McLaren cars in the official virtual program for the race.

The 2024 Dutch Grand Prix also saw a new development: A doctor and F1 enthusiast attending the race posted images to social media alerting health advocates to a mysterious new "Tobacco Innovations" kiosk,<sup>56</sup> promoting the industry's products. Representatives staffing the kiosk declined to give the doctor information when he told them he didn't smoke, so he was unable to learn more about which products they were promoting and who was behind it.

Zandvoort officials denounced the kiosk, while race organizers told newspaper Haarlems Dagblad that they were obligated to allow it due to contractual obligations with Formula One.<sup>57</sup>

This suggests Formula One itself has struck a global deal with Big Tobacco, in addition to the team-specific sponsorships, to profit from helping tobacco companies reach the sport's fans. PMI later acknowledged the stand was its enterprise, but the company said the stand sold only "smoke-free tobacco products" and was not in violation of any laws and regulations.

Newspaper De Telegraaf also reported on a "special afternoon with Max' in the VIP box of tobacco manufacturer Philip Morris," tapping into the popularity of local hero Max Verstappen, who drives for Red Bull, which is not sponsored by PMI.

It is not clear whether Verstappen visited the box, but tobacco companies use hospitality invitations to forge relationships with influential people, and the news report confirms that two former Dutch politicians were PMI's guests at the race. In the article, the De Telegraaf journalist, also PMI's guest, repeated a PMI executive's comments about the company's "smoke-free" alternatives in his report, helping PMI's questionable claims reach a wider audience.

The Dutch Grand Prix shows that even in nations with strong laws to protect health, F1 helps Big Tobacco reach fans and mislead the public about its risky, addictive products.

## The Biggest-Spending Tobacco Companies in F1 History

PMI remains the largest-spending tobacco company in the history of F1 with total sponsorship spending

estimated at almost \$2.4 billion. BAT's McLaren deal means it has now surpassed Japan Tobacco to become the second-largest spending tobacco company in F1, with an estimated total spend of \$516 million.

Company	Main brands	Est. value
Philip Morris/Altria	Marlboro, Mission Winnow	\$2.372 billion
British American Tobacco	Lucky Strike, 555, Velo, Vuse	\$515.9 million
Japan Tobacco	Mild Seven	\$481.2m
Rothmans	Rothmans, Winfield	\$260.7m
Reemtsma	West	\$234.5m
Gallaher	Benson & Hedges, Sobranie	\$223m
RJ Reynolds	Camel, Barclay	\$187.5m
Seita	Gitanes, Gauloises	\$186m
Imperial	JPS, West, Gold Leaf, Embassy	\$177.3m
Villiger	Tabatip	\$0.1m
<b>TOTAL</b>		<b>\$4.638 billion</b>

### Notes:

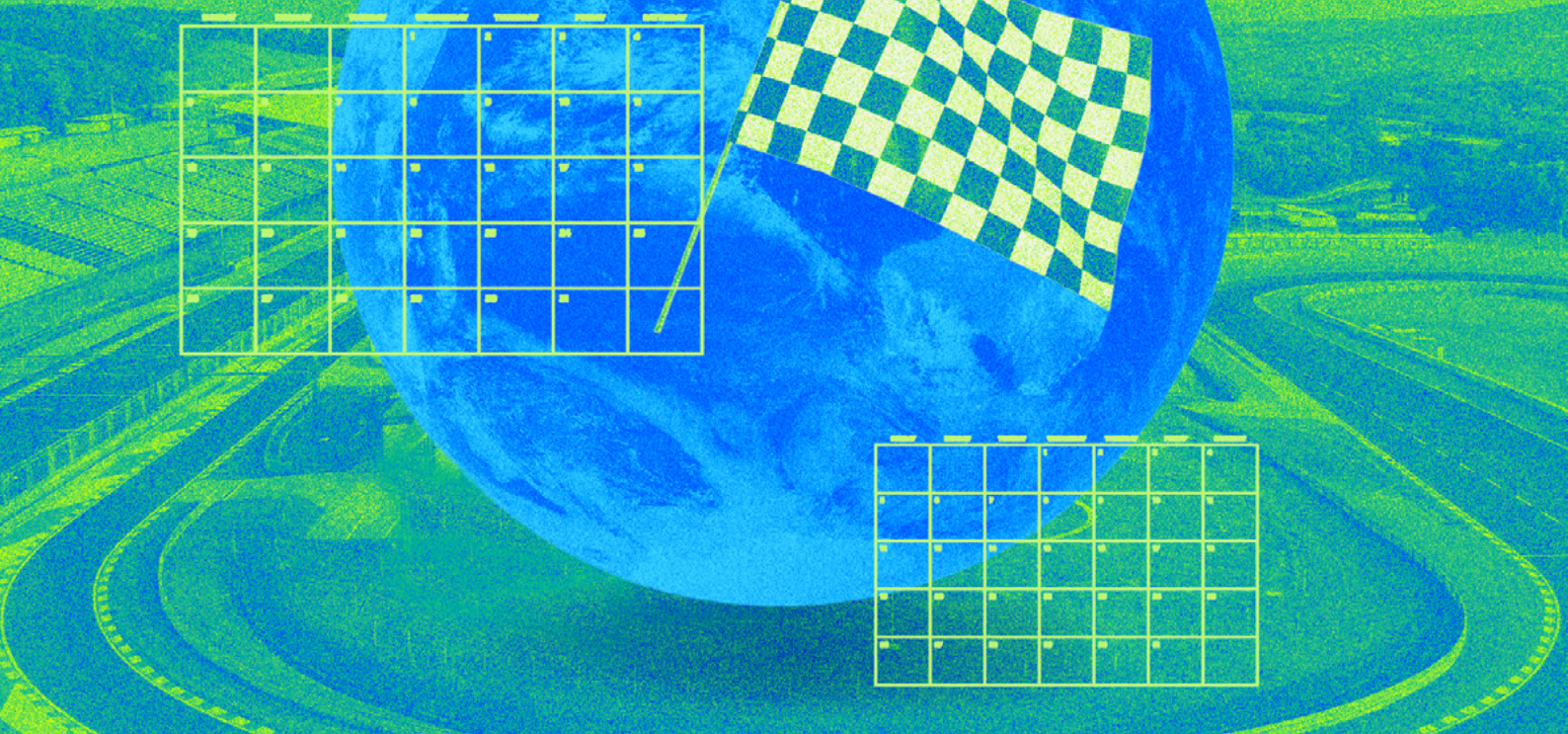
Figures cover: team title sponsorships; other major team sponsorship deals; race title sponsorships; and major trackside advertising packages. Estimates are conservative due to the difficulty of accurately identifying all trackside advertising packages at older races because of the limited availability of race footage and photographs. Some minor team sponsorships may also be excluded.

In some cases, tobacco companies changed ownership during a sponsorship tenure. For example, Reemtsma was acquired by Imperial Tobacco in 2002, in the middle of West's sponsorship of McLaren. We have attributed all West sponsorship up until 2002 to Reemtsma and from 2003 onwards to Imperial.

Sources: Formula Money Sponsorship Database; tobacco and team company documents; historical F1 reports; and Formula Money estimates.

## 05

# WHERE F1 AND BIG TOBACCO ARE DRIVING ADDICTION INTO THE FUTURE



**The Formula One calendar has undergone a drastic overhaul in the past 25 years. In 1998, there were only 16 races, and more than 2 out of 3 took place in mainland Europe. There was no race in the United States and only a single race in Asia—the Japanese Grand Prix, which reflected the ongoing interest of national companies such as Honda and Bridgestone in F1. Almost every grand prix had historic long-term links to motorsport.**

That began to change in 1999 when the inaugural Malaysian Grand Prix took place. The race was remarkable as Malaysia had little tradition in motorsport and a relatively small fanbase at the time. However, the government was willing to pay an estimated \$17.5 million fee to join the calendar, as well as build a \$180 million state-of-the-art circuit near the capital, Kuala Lumpur, to showcase the country to F1's worldwide TV audience.

It was a model that had barely been explored. Usually race promoters operate as businesses, paying a more modest fee with the intention of recouping the money from ticket sales and concessions. For Malaysia, the race was a marketing exercise. Only 80,000 fans attended across three days, compared to more than 100,000 on race day alone at some traditional races. The high hosting fee meant the race was never likely to make a profit—but that was not the point.

The race served to shatter outdated misconceptions about the nation and demonstrated to viewers worldwide that Malaysia was a modern, wealthy, technological country with a lot to offer businesses and

tourists. Other developing countries took note. China and Bahrain were added in 2004, Turkey followed in 2005, Singapore in 2008 and Abu Dhabi in 2009.

Today, most races are not run as profit-making endeavors, but rather, as marketing for countries and local regions. F1's rightsholder takes most of the revenue—broadcast/streaming, trackside advertising, race title sponsorship and premium Paddock Club hospitality—with the local race organizers making money from only ticket sales and secondary hospitality. It's likely that only a small number of high-attendance races are profitable without government assistance.

In 2024, there are a record 24 races, and only 37.5% take place in F1's traditional European base (for more on the percentage of races held in Europe, see Appendix 3). That could decrease further as the calendar is capped at 25 races and a host of new countries are clamoring to be included for the first time.

This is great news for F1 sponsors, including BAT and PMI. As Formula One reaches more people worldwide, sponsors get more exposure for their money. As race locations expand globally, the F1 audience is growing more diverse at a time when the tobacco industry is seeking new customers, particularly in low- and middle-income countries with weaker laws that allow tobacco companies to advertise and sell their products more freely.

New events in Asia and Africa are particularly attractive for the tobacco giants as they face greater legislative restrictions in F1's more traditional markets such as Europe, Australia and the Americas. The United States, where interest in F1 is on the rise, also presents opportunities for the industry to sell its risky new products. Both PMI and BAT tell their investors that the U.S. market is key to their future success (for more on the products BAT and PMI sell in F1 host countries, see Appendix 4).

**Timeline of F1 Races in New Markets Since 1999**



\*No longer on the calendar

Note: Excludes returning races such as the United States, Mexico and the Netherlands.

Source: Formula Money

Holding a grand prix in a country usually leads to a huge boost in the sport's profile there. When Mexico returned to the calendar in 2015, the number of print media articles mentioning F1 in the country more than tripled. After joining the calendar in 2004, China within a few years became F1's biggest TV market in terms of viewers.

This is valuable promotion for tobacco companies as the growth of F1's profile in these countries means more footage and images showing their logos are shared. It also gives them a positive association in those markets that is difficult to achieve by other forms of advertising, such as point-of-sale marketing. Documents from the 1990s show how tobacco companies sought partnerships in F1 to boost their own image by capturing "the attitude of F1 (danger, risk, glamour, excitement, indulgence, power, living on the edge)."<sup>26</sup> Now, as the tobacco companies increasingly market their electronic devices, those messages also include technology and innovation.

## How Philip Morris Uses the United States Grand Prix for Promotion and Lobbying

Though PMI says it's working toward a "smoke-free future," it's difficult to believe the company would give up its highly profitable cigarette business. Instead, it wants to sell its risky new products, including IQOS, which it plans on introducing in Austin, Texas, home to the Circuit of the Americas and the United States Grand Prix.

PMI has claimed over and over that its heated tobacco product is as a cessation device for adult smokers, pushing this messaging in ad campaigns and op-eds around the world, but the Campaign for Tobacco-Free Kids' report, "#SponsoredByBigTobacco," shows PMI (along with BAT) has flooded social media with misleading ads for its new products, reaching more than 150 million people under the age of 25.<sup>48</sup>

Rather than an "alternative" to cigarettes, leaked documents from PMI's Japan subsidiary reveal a marketing plan aimed at attracting a customer base that extends far wider than adults looking to give up cigarettes.<sup>49</sup> The company appears more focused on increasing addiction across the board by appealing to the public, including youth, and manufacturing support via politicians, medical providers and even officials with the Tokyo Olympics. Philip Morris Japan also covertly funded research about smoking cessation to promote industry-friendly messaging, while obscuring its involvement in the science.

If this blueprint is replicated elsewhere—particularly in the massive and lucrative U.S. market—PMI threatens to create an altogether new tobacco epidemic. Austin race organizers should be cognizant that PMI is all too happy to exploit the contest in the Texas capital for its own gain.

PMI has already made extensive use of the United States Grand Prix to promote its products and make inroads with influential people.<sup>50</sup> In 2019, the company invited a journalist from Texas Lifestyle Magazine to its Mission Winnow-branded hospitality area and received glowing coverage in the publication, which claimed, "With a focus on science, technology and innovation for the future, Scuderia Ferrari and Mission Winnow's collaboration is a marriage made in Formula One (F1) heaven."<sup>51</sup>

In 2022, to coincide with race weekend, PMI hired rock band KISS to play a secret concert for 100 guests in Austin. Guests included a local reality TV star.<sup>52</sup> Last year, around 100 executives from the retail and convenience store industry were invited to the race by PMIConnects, the tobacco company's thought-leadership and networking platform.<sup>53</sup>

Team Ferrari may have long ago dropped PMI's Marlboro branding from its cars, but PMI is still making use of its sponsorship to reach a select audience. As IQOS is set to enter the market in Austin and three other cities this year, expect the tobacco giant to continue to use the widely attended race to promote its addictive products to fans, young and old alike, and to reach decisionmakers who may facilitate its business objectives.

## Market Focus: Current Races of Strategic Interest to the Tobacco Industry

### UNITED STATES

#### F1 in the United States

Arguably F1’s biggest success in breaking into an untapped market in recent years has been in the United States—the world’s largest market for e-cigarettes by value, according to data from Euromonitor. Unlike many of F1’s breakthrough markets, the United States has a long history in the sport. The Indianapolis 500 was part of the first F1 calendar in 1950, even though it was technically not an F1 race. The first United States Grand Prix took place in Florida in 1959.

By 2000, F1 had visited nine venues in the country, but none had stuck. Just 20,000 people turned up for the 1991 Grand Prix in Phoenix, Arizona, leading to a nine-year absence for the event. Indianapolis returned in 2000 with a huge crowd of 200,000, but in 2005 the race hit trouble when only six cars participated due to a problem with most of the teams’ Michelin tires. By 2007, it had been dropped again.

F1’s success in America was jump-started in an unlikely place. In 2012, the United States Grand Prix returned to the Circuit of the Americas in Austin, Texas—long considered to be the dominion of more American forms of racing such as the NASCAR stock car racing series. To the surprise of many, the race was a success, regularly attracting more than 100,000 people on race day.

F1’s status in the United States began to change in 2016 when an American owner, Liberty Media, secured the commercial rights. Liberty made expanding the sport’s appeal in the U.S. a priority, but its success owes as much to luck as to strategy. In 2019, Netflix premiered “Drive to Survive,” which chronicled the events of the previous F1 season. It was well received, but interest surged during the pandemic. Netflix subscribers around the world were stuck at home with nothing to do and turned to “Drive to Survive” to fill their time. Interest in F1 boomed, particularly in the States.

Logos for BAT and Philip Morris brands were plastered on the McLarens and Ferraris and beamed to F1 viewers worldwide through not only race broadcasts and news

footage, but also through “Drive to Survive.” Our previous report found more than 139 one-minute segments of the series’ fourth season contained tobacco branding. This reached many people who might otherwise have missed tobacco advertising during F1 races, as many “Drive to Survive” viewers do not watch the competitions themselves. A race in Miami was added to the calendar in 2022, and Las Vegas followed in 2023.

#### F1’s Audience in the United States

Only a few years ago, Formula One was a niche sport in the United States, where motorsport was dominated by NASCAR and the IndyCar Series. Recently, however, the F1 audience has grown significantly, and the 2024 Miami Grand Prix set a record for the largest U.S. live TV audience for a grand prix, with 3.1 million viewers.

#### Grands Prix in the United States: Home TV Audience 2012-2024

Year	United States Grand Prix	Miami Grand Prix	Las Vegas Grand Prix
2012	688,000	-	-
2013	1,000,000	-	-
2014	788,000	-	-
2015	889,000	-	-
2016	727,000	-	-
2017	1,050,000	-	-
2018	793,000	-	-
2019	861,000	-	-
2021	1,200,000	-	-
2022	1,340,000	2,600,000	-
2023	1,169,000	1,960,000	1,300,000
2024	Not yet held	3,100,000	Not yet held

Source: ESPN, NBC, Nielsen

Although still a small percentage of the population compared to viewership in many European countries, it is a big improvement from a few years ago when TV rights were reportedly given away for free to ensure coverage. The growing American audience is sure to appeal to tobacco companies that sponsor F1 teams, especially PMI, which is scheduled to introduce its IQOS

heated tobacco product in Austin and other U.S. cities in late 2024.<sup>27</sup>

It is a similar story for race attendance. The United States Grand Prix debuted with a strong crowd of 265,499 over three days in 2012, but recently has performed even better. In 2022, it attracted a record 422,632 spectators to the circuit.

**Grands Prix in the United States:  
Three-Day Attendance 2012-2024**

Year	United States Grand Prix	Miami Grand Prix	Las Vegas Grand Prix
2012	265,499	-	-
2013	250,324	-	-
2014	237,406	-	-
2015	224,011	-	-
2016	269,889	-	-
2017	258,000	-	-
2018	263,160	-	-
2019	268,000	-	-
2021	365,000*	-	-
2022	422,632*	220,280*	-
2023	414,948*	270,491	315,000
2024	Not yet held	275,799	Not yet held

\*Estimated

Note: The United States Grand Prix had 440,000 spectators over four days in 2022 and 432,000 in 2023 but did not release three-day data.

Source: Formula Money Grand Prix Attendance Report

**MIDDLE EAST**

Formula One hosted its first race in the Middle East in 2004 in Bahrain. It now has four races in the region, with Abu Dhabi added in 2009 and Saudi Arabia and Qatar in 2021. The region is a major target for tobacco companies. Its population, economic growth and less-stringent sales and advertising restrictions, compared to Europe or North America, make it an ideal source for new customers. Both PMI and BAT have expanded their partnerships and activities in the region to help drive growth.

Two of the Formula One Group’s biggest sponsors—Qatar Airways and Saudi oil giant Aramco—come from the region. It is a rapidly growing market for F1. In 2019, TV audiences in the region were up 240% to 17.6 million unique viewers, making it one of the sport’s 20 largest markets. The market is likely to continue growing. For the 2024 season, F1’s rightsholder has signed a major broadcast deal with beIN, which will show F1 across the Middle East, North Africa and Türkiye until 2033, helping BAT in particular reach even more consumers across the region.

**CHINA**

The popularity of F1 in China has a checkered history, but the 2022 debut of Zhao Guanyu, China’s first F1 driver, has sparked interest in what Euromonitor says is the world’s biggest market for cigarettes by volume.

China was once F1’s largest market, hitting 119.1 million unique viewers on China Central Television (CCTV) in 2009.<sup>28</sup> By 2016, it had fallen to just 9.1 million as it shifted between channels, the races sometimes not even finding a national broadcaster.

That has changed. China is one of the few markets where an increase in interest cannot be attributed to “Drive to Survive” because Netflix is not available in the country. However, a wealth of footage has been made available through other media—in particular social media site WeChat. The announcement of Zhou’s debut drew more than 250 million views on social media site Weibo.<sup>29</sup>

In addition, F1 has returned to CCTV’s free-to-air platform, extending the sport’s reach in one of the world’s largest markets. A 69% leap in cumulative viewers in 2018 made China the sport’s second-largest market in terms of unique viewers, with an audience of 68 million.<sup>30</sup> In 2019, Nielsen found that China had more F1 fans than any other country at 81.3 million.<sup>31</sup>

The Chinese audience is young, which is also attractive to tobacco companies. A 2015 survey found Chinese F1 fans were about 5% more likely to be in the 25-34 age group than was the population as a whole.<sup>32</sup> With Liberty’s focus on social media, that has increased significantly. Data from S&P Global<sup>33</sup> showed 18% of online households in China viewed F1 in 2023, making it the country’s sixth-most popular sports competition,

just behind two soccer properties, England's Premier League and Spain's La Liga.

At the beginning of 2024, F1's rightsholder announced that Tencent<sup>34</sup> will stream all F1 sessions for the duration of the season, the same year the Chinese Grand Prix returned to the calendar after a five-year absence. Such was the renewed enthusiasm that when tickets went on sale, the website crashed and there were no standard tickets left within minutes of its restoration. Prior to the race, F1 launched accounts on two more Chinese social media channels, Bilibili and Kuaishou.<sup>35</sup>

"We're lucky that we were able to get a Chinese race this year after four years. It was very successful," Maffei, Liberty's CEO, commented. "The interest in China has exploded, in part, because we now have a Chinese driver. Critically, you see cultural identity so much when you have drivers from a country and when you have teams from a country."<sup>36</sup>

In light of the boom in interest, Formula One Group CEO Domenicali said in 2021 that a second race in China was possible,<sup>37</sup> which is sure to make the sport even more attractive to tobacco companies.

### **Market Focus: Future Races in Markets of Potential Interest to BAT and PMI**

F1's growth in popularity has led to countries around the world showing interest in joining the calendar, and there are several untapped markets that could debut in the next few years. "There's a lot of interest across Asia, as we have interest from many cities. ... Thailand, Seoul, and we've had interest from Indonesia. There are lots of places which want a Formula One race," Maffei recently said.<sup>38</sup> These, too, are markets of interest for tobacco companies.

#### **INDONESIA**

There was a brief flurry of interest in Indonesia in 2016, when Rio Haryanto became the country's first F1 driver. Haryanto exited after just 12 races, but the increased profile of the sport has meant interest among Indonesians is still high.

Indonesia is the world's second-largest market for cigarettes by volume, according to Euromonitor, surpassing even the United States. However, its market for e-cigarettes is currently much smaller, making it a key target for tobacco company expansion. BAT actively markets its Vuse e-cigarettes in Indonesia (for more on BAT's social media marketing in Indonesia, see F1, McLaren, Influencers and Instagram: BAT's Race to Reach Young Audiences in Indonesia).

A race in the country has been discussed since 2019, potentially at the new Mandalika circuit on Lombok island, which has hosted the MotoGP motorcycling world championship since 2022. Currently, the earliest that is likely to happen is 2026, but it could take longer to modify the circuit to F1 specifications and secure a budget to pay the high hosting fees. Indonesia is one of F1's top 20 TV markets in terms of annual cumulative viewers, and the nation has a growing fanbase. Despite Haryanto's exit, the TV audience in the country grew by 25% in 2018.

#### **KOREA**

Korea already had a shot at Formula One when the Korean Grand Prix took place between 2010 and 2013. However, the race struggled due to the inconvenient location of the rural Jeollanamdo circuit, located around 150 miles from Busan and nearly 200 miles from Seoul and Incheon.

Both PMI and BAT have major manufacturing centers in the country, which is one of the world's largest markets for heated tobacco products such as PMI's IQOS.

Formula One is still a minor sport in Korea, though Liberty Media would like to change that. Earlier this year, F1's rightsholder signed a deal with local streaming service Coupang Play to broadcast the races live in Korea for multiple years.

Korea is one of the most likely future venues for a grand prix. The mayor of Incheon visited the 2024 Japanese Grand Prix and delivered to Domenicali a letter of intent to host a street race in 2026 or 2027. As the world's 13<sup>th</sup>-largest economy and home of giant corporations such as Samsung and LG, it is an extremely attractive market for F1 and tobacco companies.



## THAILAND

PMI is a major player in Thailand, claiming nearly half of the cigarette market, according to data from Euromonitor. It is also an attractive market for F1. Among factors increasing interest in F1 are Red Bull, which owns 2023 champion Max Verstappen's team, being majority-owned by the Thai Yoovidhya family, and Williams driver Alex Albon racing under the Thai flag.

Like Korea, Thailand is a likely location for expansion. Then-Prime Minister Srettha Thavisin hosted Domenicali in April 2024, then met with F1 bosses again in Imola, Italy, the following month. Discussions have revolved around a street race on Bangkok's Rattanakosin Island, which Thailand Tourism wants to promote globally, or a grand prix at a permanent circuit near the airport, though construction is not expected to begin until 2027 or 2028.

## INDIA

Like Korea, India hosted a short-lived Grand Prix in the early 2010s, which was held just three times before the race, which had no government support, was shelved for financial reasons. Now the world's most populous country by some estimates and the fifth-largest economy, India is a natural expansion target for F1 and a key market for tobacco companies.

However, F1 has had mixed fortunes in India recently. Despite Liberty Media's claims that the country has F1's fifth-largest fanbase, with 31.3 million fans, F1 did not have a broadcast partner in the country in 2023 and fans could access footage only through the F1 TV app. That changed with streaming platform FanCode acquiring the rights to broadcast F1 in 2024 and 2025 at a reported discount.

"There is a growing appetite for Formula One in India, particularly amongst younger and female supporters. Nearly 60 million fans follow the sport, and 1 in 2 started following F1 in the last four years," a statement from F1 declared.<sup>39</sup>

This was almost double the 31 million fans F1 reported in 2020, and though the lack of broadcaster commitment indicates most fans have only a casual interest, it shows F1's profile is growing in the country and there is great

potential for expansion. One expert quoted by Best Media Info claimed fewer than 5 million of these fans cumulatively watched F1 on TV in 2023.<sup>40</sup>

F1 once had a free-to-air TV audience of around 60 million to 70 million in India in the early 2000s, according to Live Mint.<sup>41</sup> It was one of F1's top 20 markets in terms of unique viewers in 2018, so there appears to be room for expansion. Mohammed Ben Sulayem, president of F1's governing FIA, has pledged to grow motorsport interest in India, which is likely to help. India bans e-cigarettes, heated tobacco products and many forms of tobacco advertising, so marketing via F1 could present an opportunity for tobacco companies to build demand in the country.

## AFRICA

It's been said the F1 series is not a true world championship because Africa has been absent from the calendar since 1993. That may be set to change with Liberty Media actively looking for a venue on the continent. Interest in F1 is accelerating in Africa, where "Drive to Survive" is a hit. The proximity of the four races in the Middle East has also given fans more convenient options than travelling to events in Europe or East Asia. Lewis Hamilton, the sport's first Black world champion, is particularly popular, and race-watching parties are often held in major cities across the continent. Hamilton has joined the call to hold a race in Africa.

"When you're scrolling on Netflix and then you see 'Drive to Survive,' you end up watching and then you get interested in the sport," a Kenyan social media influencer who visited the races in Bahrain and Abu Dhabi told the BBC.<sup>42</sup>

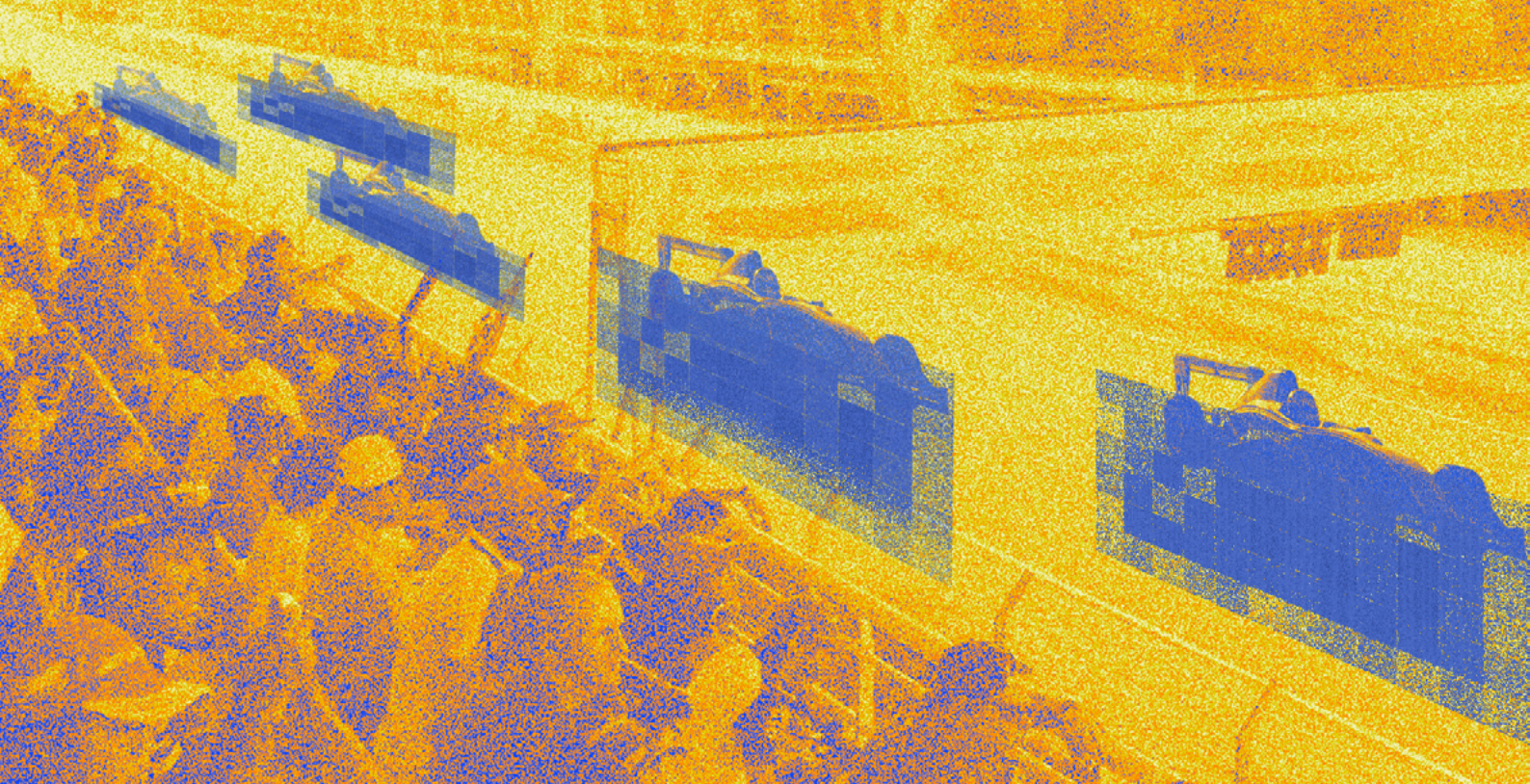
Twenty years ago, it was difficult to find coverage of F1 on TV in Africa, with many major countries getting only highlights packages. Today, there is a choice of viewing on the Motorsport channel of F1's Pan-African broadcast partner DStv (the region's biggest subscription service), on BeIN in North Africa, or on the subscription F1 TV app. This is a boost to the tobacco companies that sponsor F1 as Africa is a rapidly growing market for e-cigarettes. The market is expected to experience growth of 6.8% a year until 2029.<sup>43</sup>

A grand prix in the region would help position PMI and BAT at the forefront of the market, both by boosting

the popularity of F1 and offering opportunities for hospitality and on-the-ground promotions. A return to South Africa or Morocco seems like the most likely option, as both countries have a rich motorsport history. However, races have also been considered in locations including Rwanda and Zanzibar.

Though a popular choice with fans, a race in South Africa might not be received well by PMI and BAT as the country has some of the most restrictive tobacco advertising policies in the region. Earlier this year, it was suggested that, despite the interest in hosting a race there, South Africa's plans to clamp down on broadcasts containing tobacco products could lead to a block on F1 coverage in the country.<sup>44</sup> (For more on how South Africa and other nations have stood up to Big Tobacco, see *The Ways Countries are Standing up to Big Tobacco and F1*)

## CONCLUSIONS AND RECOMMENDATIONS



**This report demonstrates F1 continues to enable PMI and BAT to use its platform to reach a growing audience, which is increasingly young, global and diverse. Specifically, the launch of F1 Kids will further allow the tobacco industry to push the limits of its advertising, while F1's LEGO partnership could draw more children and young people into the sport, where they could be exposed to that marketing.**

The pattern tracked in these “Driving Addiction” reports fully demonstrates PMI’s and BAT’s willingness to exploit the opportunities offered by Formula One. This is no surprise, as this type of industry behavior is well-documented around the world. Tobacco companies will doubtless grab any opportunity to promote their misleading messaging and addictive and risky products. Unless reigned in, they will attempt to sidestep or subvert any guidance or policy meant to protect citizens. This “Driving Addiction” report demonstrates the situation is worsening.

As the sport draws more women, children and enthusiasts from lower- and middle-income countries, this expansion in popularity also serves a tobacco industry working to grow its customer base among similar audiences. F1’s growing presence on social media and its increased historic, dramatic and documentary programming on apps and streaming services mean it will likely continue to draw new, young fans who are exposed to tobacco company branding for addictive and risky products.

Race teams have mostly foregone tobacco advertising for many years, but McLaren and Ferrari have yet to kick the habit. Not only are these teams helmed by wildly popular drivers like Lando Norris and Charles Leclerc, but they have enormous platforms on social media. Tobacco companies know this and leverage the sport’s, teams’ and drivers’ growing popularity to market their messages and products, even incorporating influencers and artists whose work resonates with young people.

There are also indications F1's rightsholder itself has entered a business relationship with the tobacco industry, via a mysterious PMI "Tobacco Innovations" kiosk at the Dutch Grand Prix—a further regression for a sport that 25 years ago said it would end tobacco sponsorships in F1.<sup>45</sup> (For more on the kiosk, see *How the Dutch are Fighting to Protect Citizens from F1's Tobacco Advertising*.)

F1 is looking to expand out of the European heartland, where many countries have implemented strong regulations to reduce smoking and are increasingly looking to protect young people from e-cigarettes, heated tobacco products and nicotine pouches. The sport is increasingly targeting lower- and middle-income countries, where weaker institutions and regulations can allow tobacco companies to target youth and others with addictive products. The tobacco companies stand to benefit. F1's rising popularity in the U.S. could also provide PMI with additional means of promoting its IQOS heated tobacco product in the world's most lucrative market.

Liberty Media, the FIA, Ferrari and McLaren are profiting from helping an industry whose products kill more than 8 million people a year find new audiences. As the health consequences of Big Tobacco's new addictive products are not yet fully known, the F1 industry is allowing its longtime sponsors to put its fans at risk.

Tobacco company sponsorship in F1 violates many countries' laws, especially those that have adopted the World Health Organization Framework Convention on Tobacco Control (WHO FCTC), a global health treaty ratified by most nations. Because of the sport's cross-border reach, its promotion of tobacco company branding across a range of content and platforms also threatens to violate established national bans on tobacco advertising, promotion and sponsorship (TAPS). Such advertising and sponsorship also conflict with F1's alleged support for the United Nations' Sustainable Development Goals, which state strengthening the FCTC is a means of improving a country's health and reducing noncommunicable disease.

STOP calls on Liberty Media, the FIA and F1 teams to respect national laws and the sport's young fans, rather than undermine government efforts to protect them from the marketing of risky products.

Governments should mandate that TAPS bans cover all tobacco company brands and ensure that such branding is removed or blurred from all F1 programming, particularly on F1 Kids. Policies should be amended, if needed, to cover the various ways tobacco companies and F1 have subverted or violated national bans on tobacco advertising. Definitions of marketing need to be broad and should include sponsorships, historic footage, hospitality events and corporate social responsibility efforts. Advertising restrictions on tobacco products must apply to all current and future platforms.

International companies and organizations can do their part by declining to partner with or endorse F1 until it removes predatory marketing from its cars, paddocks and the sport in general, as it promised to do in 2001.

Governments must acknowledge that nicotine is addictive and that hooking children and young people on new products like nicotine pouches, electronic cigarettes and heated tobacco products increases their risk of nicotine addiction, ill health, cigarette use and death. It's also prudent for lawmakers to remember how the tobacco industry has a decades-long record of duplicity aimed at obscuring the dangers of its products—including using sport to boost its tarnished image.

National race organizers and any government agency supporting organizers must avoid signing contracts with F1 that permit venues, sponsors or teams to display tobacco ads, provide facilities for the promotion or sale of tobacco products, or host tobacco networking and hospitality events.

Given the tobacco industry's vast resources, it may seem like a monumental task to protect young F1 fans from Big Tobacco's predatory tactics, but there are examples of success. Regulation in many countries ended cigarette branding in F1 and may have deterred PMI from trying to advertise its e-cigarettes or heated tobacco products on F1 cars. In some countries with more comprehensive regulations, BAT is unable to use its branding on the McLaren cars (eight races in 2023). Cross-government and cross-country collaboration can help nations learn from each other's successes.

Vigilance is key. As the Netherlands demonstrated, a nation can successfully oppose branding on the McLaren cars one year, only to find F1's rightsholder

reportedly insisted on the presence of a kiosk promoting tobacco products at the same race the following year.

The tobacco industry uses the threat of legal action or other potentially negative consequences to discourage governments from enacting or enforcing measures to reduce the use of tobacco products. Similarly, executives with the sport's previous rightsholder canceled the 2003 Belgian Grand Prix<sup>46</sup> and later threatened to cancel other European races over countries' bans on tobacco advertising.<sup>47</sup>

Policymakers should stand firm against such threats, clearly and publicly stating that the responsibility for any inconvenience to fans lies with the senior executives of

a sport who prioritize the interests of tobacco companies over protecting fans. Such pointed statements could be powerful tools in convincing the public to join the call for change.

Generations of F1 fans were exposed to cigarette branding as the tobacco epidemic accelerated around the world. The sport should not be complicit in fueling future generations of addiction and harm. It's time for the FIA and Liberty Media to put an end to all tobacco sponsorships and deals. If they don't, it's time for policymakers to regulate the sport and its broadcast partners more strictly.

## The Ways Countries are Standing up to Big Tobacco and F1

With the growth in F1's global audiences and platforms, it may seem like Big Tobacco is winning in its efforts to reach F1's fans with its risky, addictive products.

But they're not getting it all their own way. National regulations prevent British American Tobacco—which, historically, has been outspent by only Philip Morris International when it comes to F1 sponsorship—from securing national and global exposure for its e-cigarette and nicotine pouch brands.

In 2023, tobacco advertising restrictions in nine countries meant BAT had to pull its slogans and its Vuse and Velo branding from McLaren drivers Lando Norris' and Oscar Piastri's race cars and overalls. Australia, Austria, Belgium, Brazil, Canada, Hungary, Japan, Mexico and Singapore succeeded in protecting their citizens—and viewers of those races around the world—from the industry's advertising and misleading messaging.

Where BAT can't advertise its products, it instead sometimes gives its space to stores where people can buy those products. For the 2023 Mexico City Grand Prix, BAT's branding was replaced with that of its retail partner, convenience store chain Oxxo.

BAT used that approach at more races in 2024: In Australia, the logo for OTR convenience stores replaced BAT branding; Oxxo appeared in China and Austria; grocery store chain Sobeys featured on the cars in Canada; convenience store chain 7-Eleven was used in Hungary and Netherlands; and The Shilla Duty Free Shop decorated the cars in Singapore.

The Belgian Grand Prix is another example of how BAT finds ways to advance its business interests despite national regulations. While the McLaren cars featured no tobacco branding in 2023, BAT placed "Love"—an anagram for Velo it had previously used in the Netherlands before it was prevented from doing so—on the McLaren cars in 2024. The cars also featured advertisements for Tomorrowland, a music festival that BAT sponsors to help it peddle its new products to young people.

There was a high level of cross-promotion. Tomorrowland livestreamed the race in the festival's media village, and QR codes linking to Tomorrowland's YouTube page

were available to McLaren fans in the F1 hospitality suite. Tomorrowland also created a special Belgian Grand Prix playlist. The partnership secured coverage for BAT, including in music press and on social media, that would not otherwise have been possible.

Other countries are taking stronger action to protect F1 fans. To comply with France's stringent regulations against "propaganda or advertising ... in favor of tobacco," F1's streaming service blocked access to archival footage containing cigarette ads.<sup>54</sup> This extends to some 2024 content as well, and where it features tobacco company brands, Canal+, F1's broadcast partner in France, must blur BAT's brands during race coverage.

South Africa, too, heavily regulates tobacco advertising. Lawmakers have been considering a bill that would further clamp down on tobacco companies' ability to market their products, including broadcast content that contains tobacco company advertising. News reports have pondered whether the bill's passage could affect F1 broadcasts in the country.

Anton Roux, the chairman of Motorsport South Africa and a senate member with F1's governing body, told South African media that it was not a concern because the cost would fall on broadcasters, which could either spend extra money to police the content or simply not buy the rights. In the case of the latter, he said, F1 fans could just "watch international darts instead."<sup>55</sup>

Such a flippant response from a high-ranking member of motorsport leadership, suggesting that the sport does not care if an entire market is deprived of races, appears to run counter to F1's aim of growing its global audience, including in Africa. This adds to concerns that the sport is so aligned with the interests of the tobacco industry that it may have a dismissive view of government efforts to protect the health of citizens, especially children and youth. It may also point to the level of influence tobacco companies continue to wield over the sport.

It shows that no matter how many victories they tally in their fight against Big Tobacco, countries must remain vigilant and enforce existing laws to prevent F1 from being used as a vehicle to subvert national tobacco advertising bans.

## Appendix 1: Viewership for Netflix’s ‘Drive to Survive,’ Seasons 4-6

### ‘Drive to Survive’ Audience

Week	Global Ranking	Total hours viewed	Total number of views	Number of markets in Top 10	Key markets in Top 10
<b>Season 4 (launch date 11 March 2022)</b>					
7-13 March 2022	5th	28,010,000	N/a	50	Bahrain, India, Israel, Kenya, Lebanon, Mauritius, Morocco, Qatar, South Africa, Turkey, United Arab Emirates
14-20 March 2022	4th	29,020,000	N/a	55	Bahrain, Egypt, India, Israel, Kenya, Lebanon, Mauritius, Morocco, Qatar, South Africa, United Arab Emirates
<b>Season 5 (launch date 24 February 2023)</b>					
20-26 February 2023	6th	25,760,000	N/a	43	Bahrain, India, Kenya, South Africa, United Arab Emirates
27 February – 5 March 2023	7th	26,230,000	N/a	47	Bahrain, India, Israel, Kenya, Lebanon, Qatar, South Africa, Turkey, United Arab Emirates
<b>Season 6 (launch date 23 February 2024)</b>					
19-25 February 2024	8th	21,800,000	2,900,000	42	Bahrain, India, South Africa, United Arab Emirates
26 February – 3 March 2024	5th	28,100,000	3,800,000	61	Bahrain, Egypt, India, Israel, Kenya, Lebanon, Mauritius, Morocco, Qatar, South Africa, Turkey, United Arab Emirates

Source: Netflix

## Appendix 2: Historical Tobacco Company Spending on F1

### BAT BRANDING AT 2023 GRANDS PRIX

In its fifth year sponsoring McLaren, BAT saw a slight rearrangement of its branding. Its logo on the front wing was replaced with branding on the inside of the front-wing endplates, and its sporadic branding on the chest of the drivers’ overalls was moved to the top of the left sleeve. Vuse and Velo were the main brands BAT promoted in 2023, appearing at 13 of the 22 races.

However, there was a significant change in the minor brands involved. Excluding the Mexico City Grand Prix, where Oxxo convenience store branding appeared, BAT chose not to showcase its retail partners at races where it was restricted from advertising its own products. Instead, the space reverted to McLaren’s other sponsors, and no BAT-related branding was present at eight events.

BAT’s “A Better Tomorrow” slogan appeared on drivers’ overalls at eight races, while there was additional branding for BAT at the season-ending Abu Dhabi

Grand Prix. This included a return of the branding on the front wing and spaces for BAT’s “Driven by Change” slogan on the side of the nose and the top of drivers’ helmets. Branding for Velo in the United States carried the message, “WARNING: This product contains nicotine. Nicotine is an addictive chemical.”

BAT used “Love” branding, an anagram of Velo used at the Dutch Grand Prix, to engage with fans, including a competition giving them the opportunity to have their names incorporated into the Love logo.

It is believed that despite the lack of branding for BAT at some races, there was no reduction in the \$30 million sponsorship fee due to the growing value of space on the McLaren cars’ liveries that has accompanied the team’s strong performance.

**Main logo locations of BAT branding on McLaren cars:** large on sidepod; large on front wing (one race); medium on front-wing endplate; medium on inside of front-wing endplate; small on top of nose; very small on halo; left sleeve of driver overalls; and side of driver helmet (one race).

### Brands Promoted by British American Tobacco in 2023

Brand	Type	Races
A Better Tomorrow	Slogan	Bahrain, Saudi Arabia, Miami, Monaco, Qatar, United States, Las Vegas, Abu Dhabi
Driven by Change	Slogan	Abu Dhabi
LOVE	Variant branding of Velo	Netherlands
Oxxo	Retail partner	Mexico
Velo	Nicotine pouches	Miami, Spain, Britain, Netherlands, Italy, Qatar, United States, Las Vegas
Vuse	Vaping brand	Bahrain, Saudi Arabia, Azerbaijan, Monaco, Abu Dhabi



**Tobacco-Related Brands in F1 in 2023**

Race	Branding location								
	Sidepod	Front wing	Endplate	Inside endplate	Nose	Side of nose	Halo	Sleeve of overalls	Helmet
Bahrain	Vuse	-	Vuse	Vuse	Vuse	-	Vuse	A Better Tomorrow	-
Saudi Arabia	Vuse	-	Vuse	Vuse	Vuse	-	Vuse	A Better Tomorrow	-
Australia	-	-	-	-	-	-	-	-	-
Azerbaijan	Vuse	-	Vuse	Vuse	Vuse	-	Vuse	-	-
Miami	Velo	-	Velo	Velo	Velo	-	Velo	A Better Tomorrow	-
Monaco	Vuse	-	Vuse	Vuse	Vuse	-	Vuse	A Better Tomorrow	-
Spain	Velo	-	Velo	Velo	Velo	-	Velo	-	-
Canada	-	-	-	-	-	-	-	-	-
Austria	-	-	-	-	-	-	-	-	-
Britain	Velo	-	-	Velo	Velo	-	Velo	-	-
Hungary	-	-	-	-	-	-	-	-	-
Belgium	-	-	-	-	-	-	-	-	-
Netherlands	Love	-	Velo	Velo	Velo	-	Velo	-	-
Italy	Velo	-	Velo	Velo	Velo	-	Velo	-	-
Singapore	-	-	-	-	-	-	-	-	-
Japan	-	-	-	-	-	-	-	-	-
Qatar	Velo	-	Velo	Velo	Velo	-	Velo	A Better Tomorrow	-
United States	Velo	-	Velo	Velo	Velo	-	Velo	A Better Tomorrow	-
Mexico City	Oxxo	-	Oxxo	Oxxo	Oxxo	-	Oxxo	-	-
São Paulo	-	-	-	-	-	-	-	-	-
Las Vegas	Velo	-	-	Velo	Velo	-	Velo	A Better Tomorrow	-
Abu Dhabi	Vuse	Vuse	Vuse	Vuse	Vuse	Driven by Change	Vuse	A Better Tomorrow	Driven by Change

Tobacco company spending on F1 stayed level at an estimated \$40 million in 2024, with BAT contributing \$30 million and PMI \$10 million. The total spent by tobacco companies in the history of the sport has now surpassed \$4.6 billion.

**Tobacco Company Spending on F1 to Date**

Year	Estimated spending in U.S.\$ millions
1968	0.1
1969	0.1
1970	0.1
1971	0.2
1972	0.7
1973	1.1
1974	1
1975	1.4
1976	2.1
1977	2.65
1978	3.2
1979	4.7
1980	5.6
1981	7.5
1982	9
1983	11
1984	11
1985	16.5
1986	14
1987	20.5
1988	26.5
1989	31.5
1990	42
1991	73
1992	89
1993	109
1994	116
1995	134
1996	184
1997	223
1998	236
1999	285
2000	245
2001	237
2002	235
2003	247
2004	270.5
2005	264.6
2006	200.8
2007	101.5
2008	100
2009	100
2010	100
2011	100
2012	50
2013	50
2014	50
2015	50
2016	50
2017	50
2018	50
2019	95
2020	105
2021	105
2022	40
2023	40
2024	40
<b>Total \$4.638 billion</b>	
<b>Peak \$285 million, 1999</b>	

Source: Formula Money Sponsorship Database; tobacco and team company documents; historical F1 reports; and Formula Money estimates.

**PMI's Spending on F1 by Year**

Year	Est. spend in US\$ mil.
1972	0.2
1973	0.3
1974	0.2
1975	0.5
1976	0.75
1977	1
1978	2
1979	3.5
1980	4.5
1981	5.5
1982	5.5
1983	6.5
1984	7
1985	9
1986	10
1987	10
1988	15
1989	20
1990	20
1991	25
1992	32
1993	42
1994	44
1995	59
1996	79
1997	74
1998	77
1999	77
2000	87
2001	92
2002	88
2003	88
2004	95.5
2005	97.5
2006	83.7
2007	101.5
2008	100
2009	100
2010	100
2011	100
2012	50
2013	50
2014	50
2015	50
2016	50
2017	50
2018	50
2019	75
2020	75
2021	75
2022	10
2023	10
2024	10

Source: Formula Money Sponsorship Database; tobacco and team company documents; historical F1 reports; and Formula Money estimates.

**Appendix 3: Percentage of Grands Prix in F1's Traditional European Heartland**

1998	68.8%
1999	68.8%
2000	64.7%
2001	64.7%
2002	64.7%
2003	62.5%
2004	55.6%
2005	52.6%
2006	50.0%
2007	47.1%
2008	50.0%
2009	47.1%
2010	42.1%
2011	42.1%
2012	40.0%
2013	36.8%
2014	42.1%
2015	36.8%
2016	38.1%
2017	35.0%
2018	42.9%
2019	42.9%
2020	64.7%
2021	54.5%
2022	45.5%
2023	36.4%
2024	37.5%

Note: Excludes races in Russia, Turkey and Azerbaijan, which are geographically in Europe but are not part of F1's traditional base.  
Source: Formula Money

**Appendix 4: Products PMI and BAT Sell in F1 Host Countries**

Country	PMI products sold	Brand	BAT products sold	Brand
USA	Cigarettes	Various	Cigarettes	Various
	Nicotine pouches	Zyn	E-cigarettes	Vuse*
	HTPs	IQOS**	Nicotine pouches	Velo*
Bahrain	Cigarettes	Various	Cigarettes	Various
	HTPs	IQOS	E-cigarettes	Vuse*
Saudi Arabia	Cigarettes	Various	Cigarettes	Various
	HTPs	IQOS	E-cigarettes	Vuse*
	Nicotine pouches	Zyn	HTPs	Glo
			Nicotine pouches	Velo*
Australia	E-cigarettes	Veev	Cigarettes	Various
	Cigarettes	Various		
Japan	Cigarettes	Various	Cigarettes	Various
			HTPs	Glo
	HTPs	IQOS	E-cigarettes	Vuse***
			Nicotine pouches	Velo*
China	Cigarettes	Various	Cigarettes	Various
Italy	Cigarettes	Various	Cigarettes	Various
	HTPs	IQOS	HTPs	Glo
	E-cigarettes	Veev	E-cigarettes	Vuse*
	Nicotine pouches	Zyn	Nicotine pouches	Velo*
Monaco	Cigarettes	Various	E-cigarettes	Vuse*
	HTPs	IQOS	Nicotine pouches	Velo*
Canada	Cigarettes	Various	Cigarettes	Various
	HTPs	IQOS	HTPs	Glo
	E-cigarettes	Veeba	E-cigarettes	Vuse*
			Nicotine pouches	Velo*
Spain	Cigarettes	Various	Cigarettes	Various
	HTPs	IQOS	HTPs	Glo
	E-cigarettes	Veev	E-cigarettes	Vuse*
	Nicotine pouches	Zyn	Nicotine pouches	Velo*

<b>Austria</b>	Cigarettes	Various	Cigarettes	Various
	HTPs	IQOS	HTPs	Glo
	Nicotine pouches	Zyn	E-cigarettes	Vuse*
			Nicotine pouches	Velo*
<b>UK</b>	Cigarettes	Various	Cigarettes	Various
	HTPs	IQOS	HTPs	Glo
	E-cigarettes	Veev	E-cigarettes	Vuse*
	Nicotine pouches	Zyn	Nicotine pouches	Velo*
<b>Hungary</b>	Cigarettes	Various	Cigarettes	Various
	HTPs	IQOS	HTPs	Glo
	Nicotine pouches	Zyn	E-cigarettes	Vuse*
			Nicotine pouches	Velo*
<b>Belgium</b>	Cigarettes	Various	Cigarettes	Various
	HTPs	IQOS	E-cigarettes	Vuse*
<b>Netherlands</b>	Cigarettes	Various	Cigarettes	Various
	HTPs	IQOS	HTPs	Glo
	E-cigarettes	Veev	E-cigarettes	Vuse*
<b>Azerbaijan</b>	Cigarettes	Various	Cigarettes	Various
	HTPs	IQOS	E-cigarettes	Vuse*
	Nicotine pouches	Zyn	Nicotine pouches	Lyft and Velo*
<b>Singapore</b>	Cigarettes	Various	Cigarettes	Various
<b>Mexico</b>	Cigarettes	Various	Cigarettes	Various
	HTPs	IQOS		
<b>Brazil</b>	Cigarettes	Various	Cigarettes	Various
<b>Qatar</b>	Cigarettes	Various	Cigarettes	Various
	HTPs	IQOS	E-cigarettes	Vuse*
<b>Abu Dhabi</b>	Cigarettes	Various	Cigarettes	Various
	HTPs	IQOS	E-cigarettes	Vuse*
	Nicotine pouches	Zyn	Nicotine pouches	Velo*

\*Branding featured in F1 races

\*\*IQOS is set to enter the U.S. market in 2024

\*\*\*Vuse is nicotine-free in Japan, per law

## Appendix 5: Details on Methodology

Further details on specifics of the methodology can be found throughout the report. Sponsorship data from 2004 onwards is taken from the Formula Money Sponsorship Database. Data from before 2004 has been calculated using the same methods as the database, which are detailed below. All figures are provided in U.S. dollars unless otherwise specified.

### SPONSORSHIP

#### Sponsor definitions

The Formula Money list of partners corresponds to those on the teams' websites, communications materials by the teams or sponsors, and on lists of sponsors provided to Formula Money by the teams. Companies that have branding on the cars/drivers but are not referenced as sponsors in one of these contexts are not included on sponsor lists unless there are exceptional circumstances. Companies that have branding related solely to driver sponsorships are not included.

Funding from team owners is not included unless the team owner is also classed as a sponsor on the team's main list of sponsors. Where this is the case, the value of only the sponsorship is listed, not the total team owner expenditure if this is different. For this reason, Red Bull does not usually appear on the list of sponsors of Red Bull Racing but is instead classed as a team owner expenditure.

Sponsorship from engine manufacturers includes only the purchase of branding on the car. Discounts on paid-for engine supplies and technical support are not included.

#### Logo location diagrams

Approximate size of logo is indicated by font size. The diagrams represent the typical location of the sponsor's logos and may differ at certain races. Areas of the car listed are sponsorship areas rather than the technical names for parts of the car. For example, "airbox" covers both the airbox and engine cover as sponsor logos often cover both parts.

#### Values

Few actual F1 sponsorship values are publicly available. Our estimates are based on detailed examination of numerous factors, including the overall team revenues, known prices of similar sponsorships, location and size of logos, benefits other than branding, and the performance of the team at the time the deal was signed. In the case of series sponsors and trackside advertisers, company documents from Formula One Group, which is responsible for promoting the racing championship, reveal total series sponsorship and advertising for the seasons. We make our estimates match that final total.

The value of trackside advertising packages is based on an average of all similar advertisers throughout the season and therefore may fluctuate from year to year for the same deal.

#### Sponsorship sectors

Sponsors are categorised by their main area of business or the area of business most prominent in their sponsorship with the F1 team. For example, electronics company Casio is classified under "fashion & beauty" rather than "telecoms & technology" because its partnership with the Toro Rosso team is focussed on its watch brand.



A GLOBAL  
TOBACCO  
INDUSTRY  
WATCHDOG

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