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DRIVING ADDICTION:

F1, Netflix and Cigarette Company Advertising



How much cigarette

company branding

are you exposed to?

NETFLIX

F1

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Executive Summary

To ensure its survival, the tobacco industry needs to recruit new customers to replace those who quit or die; more than 8 million people are killed every year from tobacco use. Tobacco advertising is now restricted in many countries, leading the industry's marketers to find creative ways of reaching potential customers. Sponsoring Formula One, which is broadcast around the world and growing its audience, can help cigarette companies subvert national advertising restrictions.

Formula One is booming. Many races are setting attendance records and the sport is growing rapidly in the United States, a major market for the tobacco industry. The country will host three races in 2023 and sports channel ESPN, whose audience for Formula One races grew by 28% in 2022, agreed to pay a reported \$75 million* a year¹ to renew its broadcast deal for 2023-2025.

The audiences, however, are global. The Formula One Group reported a global TV audience of 445 million unique viewers in 2021, with an average of 70.3 million people tuned in to every race. The sport also boasted 49.1 million followers on social media, generating 7 billion video views. It claims to be the fastest-growing major sports league in the world.² The tobacco industry is along for the ride, benefiting

from F1's marketing strategies and growth. [In 2020, STOP reported a concerning increase in tobacco industry spending on F1 sponsorship](#), which had risen from historic lows to 9.4% of all team sponsorship by value, the highest share since 2011.³ This signaled the tobacco industry saw something new and valuable in F1 audiences.

[In 2021, STOP revealed efforts by F1 and, by extension, Philip Morris International \(PMI\) and British American Tobacco \(BAT\), to access younger audiences](#).⁴ Extensive use of social media promotion and involvement in esports helped the sport and its tobacco sponsors to reach more young people.

This report spotlights how F1's partnership with Netflix is delivering significant cigarette company branding into homes around the world, including in many countries where broadcast regulations prohibit tobacco advertising. Governments should remove the program to protect consumers from cigarette company marketing, to comply with a global tobacco control treaty and to enforce national advertising restrictions where applicable.

*Currency listed in U.S. dollars

Big Tobacco's newest marketing vehicle: Netflix

In 2019, the tobacco industry gained a new vehicle for promoting its brands and products: F1's partnership with Netflix and its hit series, "Formula 1: Drive to Survive." Both Ferrari's sponsor, PMI, and McLaren's sponsor, BAT, have been heavily featured in the series, with extended plotlines following the teams' drivers. Research suggests that PMI and BAT are reaching new audiences through the show, including people who don't otherwise watch F1 races.

In analysis undertaken for STOP, Formula Money found that cigarette company branding was present in about 33% of minutes broadcast in Season 4. In all, an estimated 1.1 billion minutes of footage streamed around the world contained tobacco-related content, with half of all episodes in Season 4 containing tobacco-related branding in the opening minute.

This tobacco-related content is concerning, given Netflix's global reach. The series, whose fifth season began on February 24, 2023, has been credited with bringing F1 to new audiences, including those that are targets of the tobacco industry, such as young people and women. Formula Money's research shows that "Drive to Survive" viewers were younger than F1-only viewers: About 16% of F1 fans are under age 34, while 46% of "Drive to Survive" viewers are under age 34. The show has also been credited with prompting a 30% increase in female interest in the sport.

Netflix also broadcasts the series in countries with laws banning tobacco advertising. In its quest to expand its markets and hook new users, the tobacco industry has arguably benefited from this added exposure. The popularity of "Drive to Survive" has given F1 sponsors, including cigarette companies, a big boost for their money.

Sponsorship spending—and cigarette company exposure—continues

F1's expansion into the Eastern Mediterranean region, China (though the Chinese Grand Prix is suspended until 2024⁵) and the United States aligns with the tobacco industry's playbook. Each of these

regions has been targeted by the industry with either cigarettes or newer nicotine and tobacco products.

The sport's successful expansion could be a key incentive for PMI and BAT to continue their F1 sponsorships. In the last year, PMI extended its lead as the biggest-spending cigarette company in F1 history. BAT looks set to become the second biggest spender of all time in 2023 if it does not reduce its spending this year.

While PMI did not advertise its products or corporate brand, Mission Winnow, on Ferrari team cars or livery in 2022, BAT charged full speed ahead. Vuse and Velo, its e-cigarette and nicotine pouch products, were the most prominent brands on the McLaren livery throughout the season. Branding for these addictive products appeared at 13 of 22 races—including in Mexico, despite the country having strong advertising restrictions. BAT also actively engages with F1 on social media and uses its F1 sponsorship to try to burnish its reputation by commissioning artists and engaging in corporate social responsibility initiatives related to the sport.

Conclusion

Formula One and its governing body, the Fédération Internationale de l'Automobile (FIA), have ignored public calls by STOP,⁶ civil society and youth organizations⁷ to protect young F1 fans and reject tobacco money. Alarm about youth uptake and addiction to electronic products,⁸ including those advertised through F1, is increasing, as have calls to restrict advertising and marketing of these products. Yet F1 continues to help cigarette companies advertise to millions worldwide, including to young people. By featuring tobacco brands in its coverage of F1, Netflix is complicit in extending Big Tobacco's reach.

It's now more important than ever for F1 to finally stop driving addiction and ban all tobacco sponsorship in the sport. Governments can pressure F1, particularly in places where races are held or broadcast. They can also enforce existing bans on tobacco advertising and sponsorship, including on social media and streaming platforms. Failure to do so creates the risk that every new fan of F1 may become a target for cigarette companies.

Key Findings

Formula Money researchers found that:

Tobacco sponsorship in F1 remains strong.

- BAT, which sponsors the McLaren team, is currently the third biggest-spending cigarette company ever at \$455.9 million. It looks set to become the second biggest spender of all time in 2023 if it does not reduce its spending this year. It is highly visible on the McLaren cars and livery and also actively exploits its F1 sponsorship away from the racetrack.
- Despite a reduction in spending, Ferrari sponsor PMI increased its lead as the biggest-spending cigarette company in F1 history. It is now estimated to have spent close to \$2.4 billion on the sport, more than half the total \$4.6 billion spent by all cigarette companies. Netflix's "Drive to Survive" helped PMI secure further coverage for its brands and messages in 2022 from its previous sponsorship expenditure.
- Cigarette companies spent an estimated \$40 million on F1 sponsorship in 2022. This is believed to be the lowest amount spent on F1 by cigarette companies since 1989. PMI's reduced spend is the sole factor, underlining the significance of PMI's spend in the sport.

F1 is expanding to audiences and regions the tobacco industry is keen to capture.

- The F1 calendar is rapidly expanding and will include 23 races for the first time in 2023. Four races will be held in the Eastern Mediterranean region and six in the Americas (three in the U.S., and one each in Brazil, Canada and Mexico).
- F1 is positioned to expand viewers in key regions the tobacco industry is targeting, including China, the Eastern Mediterranean and the U.S.
- Coverage of F1 returned to state broadcaster CCTV in China after shifting between channels for several years. The debut of Zhao Guanyu, China's first F1 driver, will likely boost this major audience.
- In the past two seasons, races have been added in Miami, Qatar and Saudi Arabia. Las Vegas is newly added for 2023.

Netflix is helping the industry reach younger people and women.

- Formula Money estimates that more than a billion minutes of viewed "Drive to Survive" Season 4 content contained tobacco-related branding.
- Half of all episodes of Season 4 contained tobacco-related branding in the opening minute of the broadcast, meaning that even viewers who turned off the show almost immediately were exposed.
- The branding featured in 33.4% of the show's total minutes broadcast of Season 4, so there is a one-in-three likelihood of a viewer being exposed to tobacco-related branding if they watch a single minute of the season.
- "Drive to Survive" reaches a wider audience than traditional F1 programming. Viewers are younger than F1-only viewers (46% are under age 34 versus 16% for F1), more affluent (69% earn more than \$100,000 versus 49% for F1) and are more likely to have children living at home (49% vs 21%).
- Each viewer is estimated to have been exposed, on average, to 34.7 minutes of programming containing branding related to a cigarette company.
- A single minute of historic F1 footage in Episode 6 featured five different cigarette brands: West, Gitanes, Rothman's, Camel and Marlboro.
- Exposure for tobacco brands looks set to continue with Season 5 of "Drive to Survive." Within the first five seconds of the 32-second teaser trailer, a Vuse e-cigarette logo is clearly visible on the sidepod of one of the McLaren cars.

Note: The content in this Executive Summary and report refers to tobacco company sponsorship in the 2022 Formula 1 race season and content streamed on Netflix during Season 4 of "Formula 1: Drive to Survive," which was broadcast in 2022 and focuses on events during the 2021 race season. In addition, it refers briefly to what is known about tobacco company sponsorship in advance of the 2023 race season.

1: Tobacco Sponsorship in 2022

Tobacco sponsorship of F1 is an insidious problem. When the Fédération Internationale de l'Automobile (FIA) first permitted sponsorship of F1 teams in 1968, it reportedly expected to see a few discreet logos for automotive partners. But the door had been opened and cigarette companies charged through, splashing colorful cigarette branding on cars and racetracks. By 1996, the top six teams in the championship carried prominent cigarette brand logos. Growing tobacco advertising restrictions around the world, the introduction of a global health treaty (the World Health Organization Framework Convention on Tobacco Control) and the FIA's recommended ban on tobacco sponsorships in 2006 reduced tobacco spending, but never extinguished it completely.

In 2020, STOP's ["Driving Addiction: F1 and Tobacco Advertising"](#) report sounded the alarm that cigarette company spending in the sport had risen dramatically, reaching almost \$100 million in 2019—levels last seen in 2011. In 2021, STOP's follow-up report, ["Driving Addiction: Tobacco Sponsorship in Formula One"](#) examined the potential threat to public health associated with this increased cigarette company spend. As F1 strives to reach new and younger audiences via social media and esports, tobacco company branding reaches more young people around the world. The online fan base for BAT-sponsored McLaren was found to be younger, on average, than most other teams. Today, the threat tobacco sponsorship in F1 poses has become more urgent and more complex as the sport grows in popularity and successfully expands into new mediums, including Netflix.

Despite a public call from 100 civil society organizations and calls from youth groups around the world to end tobacco sponsorship in F1, the FIA has chosen to remain complicit in helping the tobacco industry reach more people.

Exposure to tobacco branding increased even as spending decreased

At first glance, 2022 could be seen as a step back for tobacco in F1. Analysis by Formula Money for STOP suggests that tobacco spending may have been the lowest since 1989, as long-standing Ferrari sponsor, Philip Morris International (PMI), significantly reduced its spend. Yet Formula Money estimates that PMI and British American Tobacco (BAT), which sponsors the McLaren team, still spent \$40 million, combined, on F1 sponsorship in 2022 (\$30 million by BAT and \$10 million by PMI).

Spend, however, is only one part of the story. Formula Money's analysis shows that both companies still received significant exposure for their money, with their branding reaching F1's massive global audiences, including its many new fans, across multiple channels.

TV audiences expanded

TV viewership of F1 races reached 445 million in 2021, with notable increases in specific markets. Audiences in the U.K. were up 39% year-on-year across the season, and total viewers in the Netherlands increased by 81% compared to 2020. Two channels in Spain saw their biggest viewing audiences since 2017, and audience records were also set in France, Australia, Austria and Canada. In the U.S., the first five races saw a viewer increase of 49% compared to 2021. The 2022 Miami Grand Prix drew a record TV audience for an F1 race in the U.S., with an average audience of 2.6 million.⁹

China is the world's biggest tobacco market and data suggests F1's audience in the country grew in 2022 as F1 returned to China's state broadcaster, CCTV, and China's first F1 driver, Zhao Guanyu, made his debut.

Much of the recent growth of F1 globally, and particularly in the United States, has been attributed to the massively popular Netflix series, "Formula 1: Drive to Survive."¹⁰ The show launched in 2019 and has gained a huge following of existing F1 fans and new fans alike, appearing in the top 10 weekly Netflix programs in more than 50 countries. It focuses on the personal stories of the drivers and has widened the sport's appeal to a mass audience.

This increase in viewers means more people see the branding F1 sponsors place on the cars and livery. The most prominently featured drivers in "Drive to Survive" Season 4, focusing on the 2021 season and broadcast in 2022, include McLaren's Lando Norris and Daniel Ricciardo, and Ferrari's Charles Leclerc and Carlos Sainz. Two of the 10 episodes focused almost entirely on the battle between the two teams for third place in the championship. And both teams regularly carried tobacco company branding in 2021.

While PMI spent less than BAT on F1 sponsorship in 2022, it continued to gain the benefit of its higher expenditure in 2021, securing more exposure for its brands than BAT in Season 4 of "Drive to Survive."

In-person race audiences grew

In-person audiences have also grown, in part, due to the expansion of the race calendar and to “Drive to Survive.” The Eastern Mediterranean region was home to four F1 races in 2021 and will be again in 2023 (Qatar did not host a race in 2022 as it was hosting the FIFA World Cup), while the United States has grown from hosting one race just a few years ago to three in 2023. United States Grand Prix promoter Bobby Epstein credited “Drive to Survive” with a 15% increase in ticket sales for the race in 2019.¹¹ The 2022 United States Grand Prix in Austin, Texas, recorded one of the highest event attendances in modern F1 history, with 440,000 in-person spectators.¹² There were record attendances also in Australia,¹³ Singapore¹⁴ and Mexico. Reports suggest race attendees surged to more than five million in 2022.¹⁵

Industry strategy in 2022

Both cigarette companies benefited from F1’s global presence and the exposure it brings in countries the industry is targeting with cigarettes and its newer products. While PMI’s sponsorship deal in 2022 led to a less obvious presence, Ferrari’s website still showed PMI as a team partner through its Mission Winnow brand,¹⁶ which promotes the concept that the cigarette giant is “transforming” despite producing hundreds of billions of cigarettes every year. It also benefited from its branding appearing in coverage from previous seasons and in “Drive to Survive.”


BAT and McLaren continued to aggressively promote their partnership on and off the racetrack, including through initiatives like their partnership with Driven by Diversity,¹⁷ which helps the cigarette giant promote its Vuse e-cigarette brand to younger audiences interested in diversity and inclusion. On-car advertising continued to be a primary strategy for BAT, appearing at 13 of the 22 races in 2022 (Vuse at eight and Velo at five; detail on the brands promoted at different races is available in section 4 and Appendix A), including Mexico City, in a potential violation of the country’s e-cigarette regulations.¹⁸ Some countries like India, which is estimated to be home to 31 million F1 fans,¹⁹ ban e-cigarette advertising; Vuse featuring prominently on McLaren cars in coverage of F1 and “Drive to Survive” helps BAT subvert these national restrictions.

Key Takeaways

- Cigarette companies’ sponsorship dollars are going further thanks to F1’s expanded calendar, growing TV and in-person audiences and the Netflix series.
- As F1’s popularity continues to grow, more fans are exposed to tobacco-related branding, including the younger fans attracted by Netflix.
- F1 and Netflix are helping cigarette companies subvert national restrictions on tobacco advertising.

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2: Netflix: A New Vehicle for Global Cigarette Company Branding



The heightened, human interest format of “Drive to Survive” has had a significant effect on the popularity of F1 outside its traditional audiences. It has made F1 drivers household names in markets where it was previously a niche sport and increased brand exposure enjoyed by F1 team sponsors. Tobacco company brands have featured prominently.

The first season launched in March 2019, covering the previous year's championship, and was immediately well received. However, it wasn't until the COVID lockdowns that “Drive to Survive” really hit its stride as consumers binge-watched episodes and its global audience grew.

New analysis of Season 4, conducted by Formula Money, reveals the extent of the global exposure BAT and PMI have gained from the show— in more than a billion minutes of streamed content, globally. Viewers are, on average, younger, more affluent and more likely to be female than F1's typical race audience.

How F1's Netflix marketing strategy benefits cigarette companies

F1 has expanded the way it reaches new fans around the world. Its increasing visibility on social media, esports and Netflix are all ways in which F1 appears to be appealing to a younger audience—a demographic the tobacco industry also targets. Since 2019, Netflix has provided F1 with another global platform to reach millions of viewers, as it seeks to reposition itself from a motorsport company to a media and entertainment brand.

Formula One Group, currently owned by Liberty Media, collaborates with Netflix to provide it with full access to the sport's executives, teams and drivers so Netflix can create a dramatic narrative to hook existing and new viewers.²⁰ The streaming giant heavily promotes the series on its platform, on its social media channels and in mainstream media. Data suggests this approach has helped the sport attract more younger and female fans.

The deal also has helped two of the world's biggest cigarette companies reach these new audiences. Not only does it feature current cigarette company branding in F1, it also shows cigarette branding in historical footage, helping these companies get even more mileage out of sponsorship money they've already spent.

More than one billion minutes of streamed content contained tobacco branding

Researchers at Formula Money analyzed 416 minutes of "Drive to Survive" Season 4 for tobacco-related branding, dividing the broadcast into one-minute segments and tallying how many of these segments included the presence of tobacco or tobacco-related branding. Further details of Formula Money's methodology and findings are available in Appendix B. The season follows the action from 2021, the last season PMI was a lead sponsor for Ferrari, and was broadcast in 2022.

Formula Money found that 149 of these one-minute segments contained tobacco-related branding—35.8% of the broadcast, with 33.4% of coverage containing images of cigarette company-owned brands and the remaining 2.4% showing BAT's retail and sponsorship partners, who replace BAT's branding at some races. Some minute segments contained a single instance of tobacco-related branding; many had multiple instances.

Half of all episodes in Season 4 contained tobacco-related branding in the opening minute. All episodes showed tobacco-related branding by the end of the fourth minute. This makes it likely that almost every viewer of Season 4 saw some tobacco-related branding.

PMI received more exposure, featuring in 97 minutes of programming, with BAT featuring in 73 minutes. While this may change in Season 5, which will cover the 2022 F1 season in which Mission Winnow did not appear on Ferrari cars, PMI may still benefit from footage of past seasons. BAT's continued sponsorship of McLaren will ensure its brands remain prominently featured.

Cumulatively, of the 57 million hours Netflix streamed around the world, an estimated 1.1 billion minutes streamed contained tobacco-related content. In some segments, tobacco-related branding was almost constantly visible. For example, the 18th minute of Episode 1 showed Vuse branding on the McLaren car and Mission Winnow branding on the Ferrari car (multiple times) and on the driver's cap and helmet.

The episodes with the highest amount of tobacco-related branding were episodes 2 and 5, which focused on the battle between McLaren and Ferrari for third place in the constructors' championship. In these episodes, 81% and 85.3% respectively of the one-minute segments contained tobacco-related brands.

Although Episode 6, which focused on the Williams team, had the third-least amount of branding (16.2%), it featured the greatest number of different tobacco brands. Despite a long absence from F1, cigarette

brands West, Gitanes, Rothman's and Camel featured in a single minute of historic footage (along with Marlboro) and on branding and display cars at the Williams and McLaren factories, underlining F1's long addiction to tobacco money.

Formula Money also found that three instances of tobacco-branded trackside advertising were featured, even though cigarette companies have not appeared as trackside advertisers since 2005. This was entirely from historic footage: Marlboro on hoardings and the podium during a Michael Schumacher segment in Episode 4, and Marlboro and Gitanes on hoardings in Episode 6's celebration of Williams. This demonstrates that F1 sponsorship keeps delivering exposure for cigarette companies' brands long after the deal has ended.

While the amount of exposure cigarette companies enjoy may change in Season 5, which will cover the 2022 F1 season after PMI's Mission Winnow disappeared from Ferrari cars, PMI may still benefit from footage of past seasons. BAT's continued sponsorship of McLaren will ensure its brands remain prominently featured.

Half of episodes contained tobacco-related branding in the opening minute. All episodes showed tobacco-related branding by the end of the fourth minute. A viewer watching a single minute of "Drive to Survive" is highly likely to have been exposed to tobacco-related brands or messaging.

Who are BAT and PMI reaching through "Drive to Survive?"

Netflix releases limited data on its audience, but the data that is available indicates that "Drive to Survive" has been an amazing success for F1 and, by implication, for the sponsors that pay to have their logos seen on the cars and drivers' overalls, including tobacco-related brands.

In November 2021, Netflix launched Top10Netflix.com, which tracks the total number of hours viewed of its

top 10 programs globally. This provides some data for "Drive to Survive" Season 4, which was one of the top 10 in each of the two weeks after its release on March 11, 2022.

In the week starting March 7, 2022, 28 million hours of Season 4 were viewed, making it the fifth most popular TV program on Netflix worldwide. The following week subscribers watched 29 million hours, moving it up to 4th place and giving a total of 57 million hours viewed. After that, the program dropped out of the global top 10. Netflix does not publish figures for programs lower than 10th place but "Drive to Survive" will have had additional views, so the actual number of hours viewed is likely to be even higher.

"Drive to Survive" featured in the top 10 in 50 countries in its first week and 55 in its second. It was the number one TV program in Norway in both weeks, and in Bahrain, Belgium, the Czech Republic, Hungary, Luxembourg, the Netherlands, Slovakia, Sweden and Switzerland in its second.

Overall, Season 4 stayed in the top 10 for six weeks in Norway and four weeks in Belgium, Croatia, the Czech Republic, Denmark, Hungary, Ireland, Latvia, the Netherlands, Portugal, Slovakia, Sweden and the United Kingdom.

It was in the top 10 for two weeks in India (5th and 6th) and Mexico (6th and 8th) but not at all in Brazil, according to Netflix.

The specific number of hours viewed by market is not published by Netflix, however, research from external agencies gives some insight into the regional popularity of the show.

Nielsen tracked "Drive to Survive" audiences in the United States in a 2022 survey²¹ that estimated Season 4 had an average of 407,678 local viewers per minute during the first week it was available to stream. This was more than any previous season.

The survey also found that the series "inspired U.S. audiences to start watching Formula 1 races," showing that 360,000 viewers of Season 4 who

hadn't watched the 2021 season subsequently watched F1 in 2022. However, it also demonstrated that many viewers of "Drive to Survive" do not also watch F1 race programming: Only 41% of "Drive to Survive" viewers in the U.S. also watched the first three weeks of the new F1 season.

Outside the U.S., interest is also high. Data from research agency Digital-i indicates that the series had a cumulative audience of 25.8 million accounts over its first four seasons in the U.K., France, Italy, Germany and Spain. This included 5.9 million accounts that watched Season 4 during the first 28 days of release. It found that 42% of account holders were under 34 and 35.7% were female, suggesting the series has been successful in attracting young, female viewers. This is a particularly attractive demographic for the tobacco industry.

Specifically in the U.K., almost 7.4 million accounts have tuned in to one of the seasons of "Drive to Survive." This includes 2.2 million accounts that watched Season 4 during its first 28 days of availability, the highest tally of any of the four seasons.

"Drive to Survive": Key markets

Nielsen's data showed that 407,678 people watched Season 4 during its first week in the U.S. Assuming that its second week followed a similar increase in viewing as Netflix's global tally of hours watched

(+3.6%), this amounts to 830,032 total estimated viewers for the first two weeks. If each viewer watched 34.7 minutes containing tobacco-related branding, this means that 28.8 million minutes containing tobacco-related branding were consumed in the U.S. in total.

The audience in the U.K., one of F1's most long-standing fan bases, is likely even higher. Digital-i found that over the first four weeks of streaming, Season 4 clocked 2.2 million viewers in the country. The majority of this viewing appears to have been in the first two weeks of availability. Netflix's own data shows that "Drive to Survive" was the third most-watched show in the U.K. in its first and second weeks, 9th in its third and 10th in its fourth. Assuming that 70% of the viewers recorded by Digital-i watched in the first two weeks, that gives a total of 1.6 million viewers, consuming an estimated 54.7 million minutes with tobacco-related content.

Season 4 had less longevity in the other four main European markets, staying in the top 10 for two weeks in Germany (8th and 5th place), France (6th and 4th place) and Italy (8th and 9th place) and for just one week in Spain (10th place). This means that almost all of the 3.6 million viewers recorded by Digital-i can be attributed to the first two weeks of streaming. Assuming that this covers 95% of "Drive to Survive" viewers in those countries, that makes a total of 3.4 million viewers, consuming an estimated 119.2 million minutes with tobacco-related branding.



While the logo for PMI's corporate brand, Mission Winnow, did not appear on cars or livery in the 2022 race season, it was featured in Season 4 of "Drive to Survive," which covered the 2021 race season. Viewers of Season 4 were thus exposed to Mission Winnow branding in 2022, as well, when Season 4 was released. Photo credit: Netflix, 'Drive to Survive', Season 4 Episode 2.

VIEWERS OF DRIVE TO SURVIVE IN THE U.S.

Season	Launch date	Viewers in first week
Season 1	March 8, 2019	288,779
Season 2	February 28, 2020	199,308
Season 3	March 19, 2021	243,445
Season 4	March 11, 2022	407,678

Source: Digital-i

SEASON 4 DEMOGRAPHICS: KEY EUROPEAN MARKETS

	No. of households '000s		
Account holder age	Female	Male	Total
18 to 24	292.3	240.6	532.9
25 to 34	721.1	1,044.5	1,765.6
35 to 44	489.1	839.8	1,328.9
45 to 54	277.0	1,248.5	1,525.5
55 to 64	121.4	587.0	708.5
TOTAL	1,901.0	3,960.3	5,861.3

Source: Digital-i

SEASON 4 DEMOGRAPHICS: UNITED KINGDOM ONLY

	No. of households '000s		
Account holder age	Female	Male	Total
18 to 24	39.0	39.6	78.6
25 to 34	264.6	271.0	535.5
35 to 44	154.9	349.4	504.3
45 to 54	143.6	558.0	701.6
55+	47.3	380.3	427.7
TOTAL	649.4	1,598.3	2,247.7

Source: Digital-i

Note: Number of viewers based on gross average number of viewers during premier week.

Source: Nielsen Streaming Content Ratings

"Drive to Survive" Draws More Women to F1

- The series is helping BAT and PMI reach more women.
- Alejandro Soberon, promoter of the Mexico City Grand Prix, asserted that "Drive to Survive" encouraged more women to attend the race, leading to a 30% increase in female interest. "Many of the guys who used to come alone now have a problem! It used to be a free weekend and now it might not be a free weekend anymore because their ladies might say, 'Hey, I'll come!'"²²
- Available data appears to confirm anecdotal comments about the success of "Drive to Survive" in drawing young women to F1. Of Netflix account holders in five key European markets who watched "Drive to Survive," 35.7% were female. In these markets, the 18-24 age range had more women account holders than men. (Digital-i)

How "Drive to Survive" accelerates cigarette companies' strategies

To replenish and grow its customer base, the tobacco industry targets successive generations of youth and specific countries and demographics.

Although "Drive to Survive" follows each F1 championship year, it does so from a different angle compared to the live races. The focus is on the drivers and their personalities, rather than the cars, strategies and results. Struggling rookies can get as much screentime as the championship contenders. This format has introduced F1 to new viewers who are interested in off-track dramas and intense rivalries. Some viewers do not even watch race broadcasts, only the series.

While cigarette company branding shown during F1 races helps the industry reach younger F1 fans, the Netflix series is extending that reach to younger people who don't watch F1 races. A Nielsen survey found that "Drive to Survive" viewers were younger than F1-only viewers (46% are under age 34 versus

16% for F1), more affluent (69% earn more than \$100,000 versus 49%) and are more likely to have children living at home (49% vs 21%). This means that brands that appear in "Drive to Survive" are reaching a significantly younger audience than through traditional F1 programming, while the demographics of Netflix account holders suggests they're also reaching more women. These new viewers are not only being exposed to the industry's current branding, but also past coverage featuring leading cigarette brands.

Netflix and F1 are complicit in helping cigarette companies subvert advertising restrictions

Many countries around the world restrict or ban the advertising of cigarettes. Some also ban tobacco sponsorships, like Australia. Some, like India, place conditions on any broadcast footage featuring tobacco brands or depictions of use. Others ban the sale and advertising of the industry's electronic products, like Brazil, India and Mexico. By streaming PMI's and BAT's product brands and corporate messages into homes around the world through race coverage and "Drive to Survive," F1, Liberty Media and Netflix are complicit in helping the cigarette giants undermine these restrictions. Governments should hold them accountable and remove the program.



The second most common type of tobacco-related branding in Season 4 was product branding. BAT uses its McLaren sponsorship to advertise its e-cigarette, Vuse, and nicotine pouch, Velo. Photo credit: Netflix, 'Drive to Survive' Season 4 Episode 5.

Key Takeaways

- 35.8% of minutes broadcast of “Drive to Survive” Season 4 contained tobacco-related branding, when only two of the 10 teams in F1 have tobacco sponsors.
- PMI received the most exposure through Season 4, featuring in 97 minutes of programming. BAT featured in 73 minutes.
- The show’s focus on the off-track dramas and intense rivalries in F1 have broadened the sport’s appeal to mass audiences, including young people, women and people who don’t watch F1 race broadcasts. This gives PMI and BAT an additional global audience for their sponsorship spend that aligns with their business interests.
- If these new fans watch one minute of “Drive to Survive” Season 4, they are likely to be exposed to tobacco-related branding.
- Governments should act to remove the program in order to protect consumers from cigarette company marketing, to comply with treaty obligations and to enforce national advertising restrictions, where they may be violated.

“Drive to Survive” Has Accelerated F1’s Growth

“Our whole ecosystem starts with the fan and when you get the fan, you have countries that want to hold races, you have broadcasters that want to spend money and broadcast our event, which then all trickles down to the racing teams, which then allows us to pay all the salaries of the men and women that work at our racing teams, drivers included. I don't think we'd be sitting here at this racetrack [in Miami], realistically, probably, without what Netflix has done.”

– Zak Brown, McLaren team principal

3: What Drives Cigarette Companies to Sponsor F1



The Formula One world championship is often referred to as the world's most-watched annual sporting event, making it a valuable platform for companies looking to reach a wide, international audience. And the sport is growing. The Formula One Group recorded a global TV audience of 445 million unique viewers in 2021,²³ the most recent year for which full data is available. This was a 2.8% increase on 2020's 433 million²⁴ and trends suggest that number could be even higher in 2023. An average of 70.3 million people tuned in to every race and the sport had 49.1 million followers on social media, generating 7 billion video views. Digital now represents 16% of the total minutes of F1 coverage that are consumed.

Studies have shown that around the world, Formula One viewers tend to be more likely than the general population to be high earners and highly educated. They are drawn to the sport by a combination of speed, glamor and technology—attributes the tobacco industry tries to associate with its electronic products, just as it used to associate its cigarette brands with F1's speed and glamor. The F1 audience is also getting younger, as initiatives like "Drive to Survive" make the sport more attractive to that demographic.

Sponsoring F1 gives cigarette companies access to these TV and online audiences.

F1's calendar is expanding to new locations

The F1 race calendar is rapidly expanding and will include 23 races for the first time in 2023. This increases cigarette companies' audience reach both at the racetrack and via increased TV coverage. In the past two seasons, Miami, Qatar and Saudi Arabia have joined the calendar for the first time, bringing F1 to new audiences in these markets. Las Vegas will return in 2023 after an absence of 41 years. These changes signify a significant expansion in the Eastern Mediterranean region and the United States, which previously had only three races between them. Both regions are significant targets for the tobacco industry. BAT cites the United States as one of the key markets for its e-cigarettes,²⁵ which it advertises through its F1 sponsorship. The industry also sees an opportunity to grow sales of cigarettes and its electronic products in the Eastern Mediterranean region, which has a comparatively young population with more disposable income.

Commenting on the launch of the Saudi Arabian Grand Prix, F1 chairman Chase Carey said: "The region is hugely important to us and with 70% of the population of Saudi being under 30 we are excited about the potential to reach new fans."²⁶

Accessing new, young fans was also a factor behind the move to Miami. Race promoter Tom Garfinkel highlighted the growing popularity of F1 in the U.S. "Liberty Media have done a fantastic job during their

tenure of ownership in growing the sport globally," he said. "What's happening with Formula 1 in the United States in the last year or so is really quite a phenomenon. It is on the minds of people that not only weren't Formula One fans, they maybe weren't even race fans. They're engaged. They're excited. The bottom line is that Formula 1 is cool. It's cool for young people."²⁷ The tobacco industry has spent tens of millions of dollars in advertising to make its products appear "cool" to successive generations, often through associations with music, culture and sports.

"The growth in the U.S. is very important," F1's CEO Stefano Domenicali confirmed. "It's significant for the whole F1 world for many, many reasons."²⁸ The American 1978 world champion, Mario Andretti, added that "if someone had told you not so long ago that this series would not only be in Miami, but that it [F1] was going to be in the United States more than once a year, if at all, you would have had their heads checked."²⁹

Data confirms the U.S. growth trend. In May 2021, the new race in Miami saw 242,955 spectators go through the gates across the weekend.³⁰ In October, the 2022 United States Grand Prix beat its own record from the previous year (380,000 attendees), with 440,000 people attending over four day—one of the highest event attendances in modern F1 history.³¹ The new race in Las Vegas, which will take place in November 2023, is set to add significantly to that tally. Clark County, Nevada, predicts that 170,000 people will visit the city for the event.³² Domenicali says that Las Vegas "will be the iconic race, the flagship race, of F1 within a couple of years."³³

F1 is growing a younger fanbase

Data released by F1 in 2019³⁴ showed that almost two-thirds of fans (62%) were aged under 45, an increase of 3% year on year. In addition to this, IPSOS found that 61% of new fans of the sport were aged under 35, and 36% were under 25.

Factors cited for this shift include the popularity of the "Drive to Survive" and esports initiatives such as the Virtual Grand Prix series that ran in early 2020 when Grands Prix were cancelled due to COVID-19.

Nielsen research also noted that younger drivers, including McLaren's Lando Norris and Ferrari's Charles Leclerc, had used game-streaming platform Twitch to connect with their fans. Both Norris and Leclerc also feature prominently in "Drive to Survive," while driving for teams (McLaren and Ferrari) that have cigarette company sponsors.

Around 34% of fans have been following the sport for less than five years, according to the latest edition of the Global F1 Fan Survey.³⁵ In 2017, when the survey was last conducted, only 12% of fans fell into this category. This suggests the tobacco industry is accessing a new wave of F1 fans it had not reached previously via the sport.

Behind these changes is Liberty Media, the current owners of F1, who saw commercial potential in growing global and, particularly, younger audiences for the sport. Their approach marked a departure from the attitude of former F1 CEO, Bernie Ecclestone, who in 2014 told Campaign Asia-Pacific that younger fans were not F1's target audience: "Young kids will see the Rolex brand but are they going to go and buy one? They can't afford it. I don't know why people want to get to the so-called 'young generation.' Why do they want to do that? Is it to sell them something? Most of these kids haven't got any money. I'd rather get to the 70-year-old guy who's got plenty of cash." However, the tobacco industry sees significant opportunity in younger audiences: Most lifetime tobacco users start before the age of 21.

F1 is increasing its global TV audience

Examining F1's 2021 global TV audience in more detail, there was a much more significant increase in certain markets, particularly toward the end of the season as the thrilling battle for the championship reached its conclusion.

Predictably, audiences in the U.K. and the Netherlands were up, boosted by interest in home heroes Lewis Hamilton and Max Verstappen. Sky Sports in the U.K. recorded a 39% year-on-year increase in audiences across the season. Meanwhile, Ziggo Sport, the broadcaster in the Netherlands,

recorded its highest audiences in history, with total viewers increasing by 81% in 2020.

Audiences also set records on Canal+ in France,³⁶ Foxtel in Australia,³⁷ ORF in Austria³⁸ and TSN in Canada.³⁹ In Spain, Fernando Alonso's return and Carlos Sainz's move to Ferrari meant that F1 on DAZN and Movistar reached its biggest audience since 2017.⁴⁰

When Formula One Group releases data for 2022, it is likely to say that F1 viewership increased again as growth in new markets such as the United States continued. ESPN reported that the first five races of the season attracted 49% more viewers in the United States than in 2021, with the inaugural Miami Grand Prix attracting 2.6 million people, the largest audience ever for a live F1 telecast on U.S. television.⁴¹

Meanwhile, F1 returned to state broadcaster CCTV in China. China was once F1's biggest market, hitting 119.1 million unique viewers on CCTV in 2009.⁴² By 2016 it had fallen to just 9.1 million viewers as race coverage shifted between channels, sometimes not even finding a national broadcaster. The debut of Zhao Guanyu, China's first F1 driver, should have helped to boost the audience again, increasing the potential reach of BAT and PMI, via F1, to the world's largest tobacco market.

According to F1 CEO Stefano Domenicali, audiences were up 9% in France, possibly due to the presence of a French-speaking driver, Charles Leclerc, at the front of the grid. Domenicali also cited growing audiences in the three main countries covered by F1's broadcast deal with Sky: the U.K. (60%), Italy (20%) and Germany (24%).

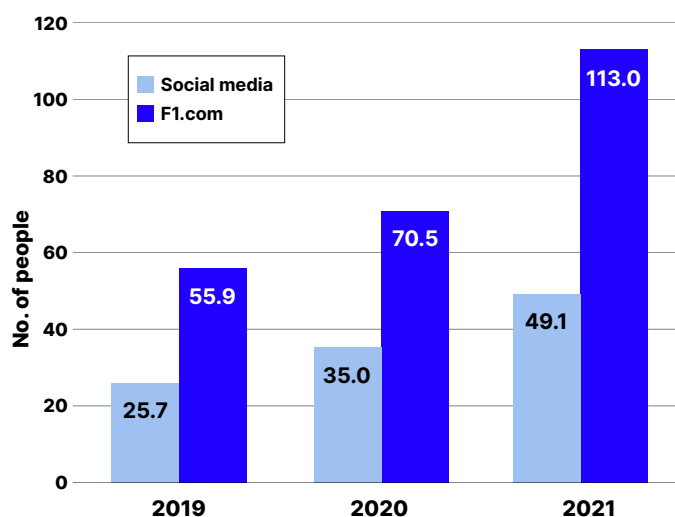
In addition to the U.S. and U.K., BAT cites France, which also hosted an F1 race in 2022, as a key market for its e-cigarette products. Hungary, Italy and Japan, which also hosted races, have been cited as key markets for its heated tobacco product, as well.⁴³

F1 is boosting its social media presence

Online and social media coverage of F1 is booming. Liberty Media's efforts to improve F1's digital presence have paid off in terms of audience, and F1 claims it was the fastest growing major sports league in the world in 2021 in terms of social media followers.⁴⁴ Followers across the main platforms increased by 40% to 49.1 million compared to 2020, while total engagement was up 74% to 1.5 billion. Around 63% more users visited F1.com, bringing the total to 113 million. Across all platforms, video views were up 44% to 7 billion.

On a number of occasions through 2022, F1 referenced notable historic races on its social media accounts to publicize upcoming races. This content sometimes featured cigarette brands, again helping tobacco companies advertise cigarette brands to F1's global audiences.

FORMULA ONE'S DIGITAL AUDIENCE 2019-2021



Source: Formula One

DATA FOR GRAPH		
Year	Social media	F1.com
2019	25.7	55.9
2020	35.0	70.5
2021	49.1	113.0

F1 and Netflix help cigarette companies subvert tobacco ad bans

In the early 2000s when a growing number of countries banned cigarette advertising and sponsorship in line with a global treaty, F1 took steps to end tobacco sponsorship. F1 fans in countries that had banned cigarette advertising were no longer exposed to tobacco advertising in race coverage from countries where restrictions were not as strict.

A similar problem exists today. Some countries have banned all tobacco advertising and sponsorships. Some countries ban the industry's electronic products and some permit them but place restrictions on their sale and marketing. BAT uses F1 to advertise its Vuse e-cigarette product, which the company claims has more than a third of global market share and is the market leader in the U.S.

The following examples illustrate F1 and Netflix's global problem: They are helping global cigarette giants subvert national laws at a time when there is growing concern about youth uptake of the industry's electronic products, as well as cigarettes, across a wider range of countries.

- **Australia** has strict regulations, and thus, branding for the product can't be used on cars at the Australian Grand Prix. But Australian fans are exposed to Vuse advertising when they watch coverage of other races or "Drive to Survive," or engage with F1 content on social media. BAT sells Vuse in Australia. The industry is lobbying policymakers to relax Australia's regulations, despite growing concerns about an increase in youth use of e-cigarettes.
- **India** does not feature on the F1 calendar, but there are reported to be tens of millions of F1 fans in the country, which has a ban on electronic tobacco and nicotine products and where industry advertising is highly regulated, including in film and TV content. Yet fans in India are exposed to cigarette company messaging and e-cigarette branding when they watch coverage of certain F1 races, "Drive to Survive," or access F1 content on social media. The industry, directly and through its allies, is pushing policymakers in India to relax its restrictions on these

products, when there are growing concerns about e-cigarette use among youth.

- **Mexico** banned e-cigarettes in May 2022⁴⁵ and has implemented stronger regulations on the availability and marketing of all tobacco products. Despite this, the Vuse brand was used on McLaren cars during the 2022 Mexico City Grand Prix, which was held on October 30.⁴⁶
- **Brazil** has banned the import, sale and advertising of e-cigarettes since 2009, upholding this ban in 2022.⁴⁷ As in Australia, Vuse can't be advertised on the McLaren car at the Brazilian Grand Prix, but fans in Brazil are exposed to e-cigarette advertising via coverage of other races, "Drive to Survive," and F1 social media content.

This small selection illustrates F1 and Netflix's global problem: They are helping global cigarette giants subvert national laws at a time when there is growing concern about youth uptake of the industry's electronic products, as well as cigarettes, across a wider range of countries.

Policymakers should examine F1 and its media partners more closely and hold them accountable, if the sport will not act to end tobacco industry sponsorships.

Key Takeaways

- F1 is expanding and growing in key markets the tobacco industry is targeting, including the Eastern Mediterranean region, China, the U.S. and the U.K.
- F1 sponsorship helps cigarette giants subvert restrictions on tobacco company sponsorships and e-cigarette advertising, designed to protect youth, in countries with large F1 fan bases, via race coverage, "Drive to Survive," social media content and even at the racetrack.
- As F1 gains more younger viewers, cigarette companies secure access to a demographic they want to reach to attract new customers. Policymakers wanting to protect young people from addiction and harm linked to the industry's products should pay attention to F1's and Netflix's complicity.

Policymakers should examine F1 and its media partners more closely and hold them accountable, if the sport will not act to end tobacco industry sponsorships.

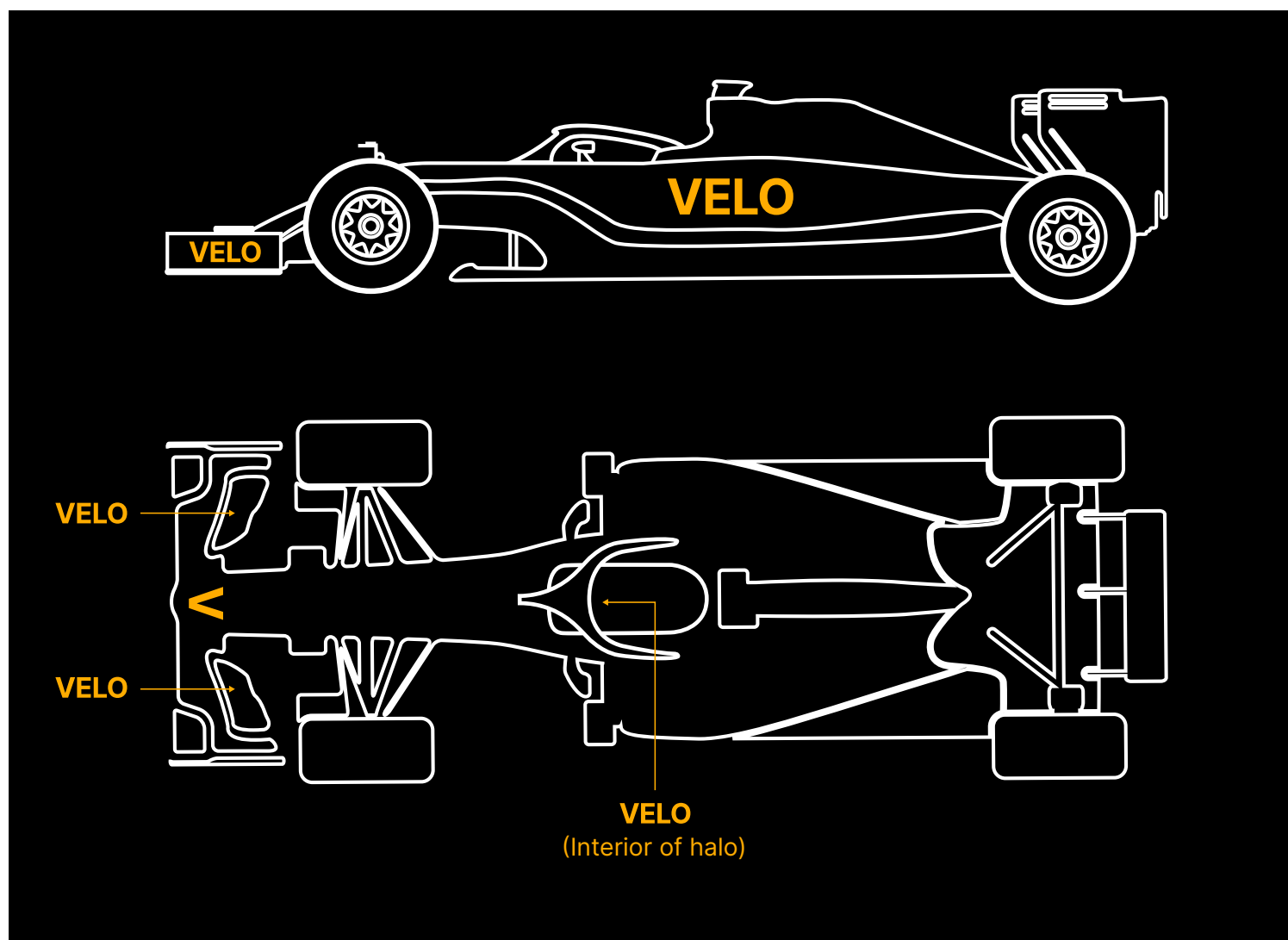
4: British American Tobacco and McLaren: Finding Different Routes to Benefit from Their F1 Deal

BAT entered the fourth year of its partnership with McLaren in 2022, with no sign of any reduction in branding or spend. Vuse and Velo were still the prominent brands on the livery, appearing at 13 of the 22 races. (Vuse at eight and Velo at five).

BAT's retail and festival partners—including Tomorrowland, a music festival popular among young people—were the main brands on display at eight of the remaining races, while the company's "A Better Tomorrow" slogan was the main brand at the Japanese Grand Prix. "A Better Tomorrow" and "Accelerating Transformation" also appeared on the drivers' overalls at six events.

Notably, Vuse appeared prominently on the cars in Mexico, despite the country having strong restrictions on the advertising of tobacco-related products.

BAT MAIN LOGO LOCATIONS 2022



BAT branding was carried on the sidepod, front wing, front wing endplate, on top of the nose and on the halo of the car.

Using F1 to associate Vuse with corporate social responsibility

One of the most noticeable BAT and McLaren promotions during the 2022 season was Driven by Change, an initiative created by McLaren and Vuse “to empower and spotlight under-represented artists from all walks of life.” It thus linked tobacco sponsorship with a positive philanthropic project. This type of corporate social responsibility activity is a typical tobacco industry tactic to burnish the company’s reputation and distract from the harms it continues to cause.

Driven by Change launched at the 2021 Abu Dhabi Grand Prix with a special livery created for McLaren by UAE-based artist, Rabab Tantawy.⁴⁸ The art car concept was repeated at the race in 2022, with a livery designed by another locally-based artist, Anna Tangles.⁴⁹

The initiative also saw Colombian street artist, DAST, paint murals for the Monaco Grand Prix⁵⁰ and Mexico’s Luis Pablo create a statue of a Kiwi bird for display in the McLaren Technology Centre ahead of his home Grand Prix.⁵¹

The initiative attracted significant media attention in outlets that might not usually cover an F1 livery design including Dazed,⁵² which ran a series of sponsored articles on the project "In Partnership with Vuse," Hypebeast,⁵³ the Mirror,⁵⁴ Top Gear,⁵⁵ Grazia,⁵⁶ What's On UAE,⁵⁷ Emirates Woman⁵⁸ and Investing.com.⁵⁹ Sky Sports tweeted a photo of the Anna Tangles design with a caption noting "that special McLaren livery,"⁶⁰ which was liked by more than 2,300 people.

The initiative was also trumpeted by Driven by Diversity, an organization whose "mission is to educate individuals and organizations on the value of diversity and inclusion in motorsports," which said it was "working with Vuse x McLaren Racing" on the project.⁶¹

The coverage was overwhelmingly positive with outlets admiring both the art and the project's aims. However, Sports Illustrated noted that "fans are not happy with McLaren's collaboration,"⁶² drawing attention to some social media reactions from fans who questioned the tobacco link. "I wish you'd break this addiction to big tobacco money," one fan declared,⁶³ while another remarked, "can't believe you're still shamelessly advertising smoking."⁶⁴

Sports Illustrated noted that **"fans are not happy with McLaren's collaboration,"** drawing attention to some social media reactions from fans who questioned the tobacco link. **"I wish you'd break this addiction to big tobacco money,"** one fan declared, while another remarked, **"can't believe you're still shamelessly advertising smoking."**



Branding for Vuse, BAT's e-cigarette, featured prominently in Season 4. The series helped cigarette company sponsors reach more women and young people than F1 alone. Photo credit: Netflix, 'Drive to Survive', Season 4 Episode 2.

BRANDS PROMOTED BY BRITISH AMERICAN TOBACCO IN 2022

Brand	Type	Races	Country regulations*
A Better Tomorrow	Slogan	Bahrain	Bans tobacco advertising, promotions and sponsorship. Different regulations apply to different electronic nicotine delivery systems and electronic non-nicotine delivery systems **
		Saudi Arabia	Restricts tobacco advertising, promotions and sponsorship. Regulates electronic nicotine delivery devices.
		Monaco	None
		Japan	Bans the sale of electronic nicotine delivery devices that contain nicotine.
Accelerating Transformation	Slogan	Emilia Romagna (Italy)	Restricts tobacco advertising. Regulates electronic nicotine delivery devices.
		Miami (U.S.A.)	Restricts tobacco advertising and sponsorships. Regulates electronic nicotine delivery devices.
		Spain	Bans tobacco advertising, promotion and sponsorship. Regulates electronic nicotine delivery devices.
AM PM	Retail partner	São Paulo (Brazil)	Bans many forms of tobacco advertising and promotion. Bans advertising and sale of electronic nicotine delivery devices.
Autogrill	Retail partner	Hungary	Restricts some tobacco advertising and sponsorships. Regulates electronic nicotine delivery devices.
Circle K	Retail partner	Canada	Bans many forms of tobacco and electronic nicotine delivery device advertising, promotion and sponsorship.
EG Group	Retail partner	France	Restricts tobacco advertising and sponsorships. Regulates electronic nicotine delivery devices.
OTR	Retail partner	Australia	Bans many forms of tobacco advertising, promotion and sponsorship. Regulates electronic nicotine delivery devices.
Oxxo	Retail partner	Singapore	Bans many forms of tobacco advertising and promotion. Bans advertising and sale of electronic nicotine delivery devices.
Press Shop & More	Retail partner	Belgium	Restricts tobacco advertising and sponsorships. Regulates electronic nicotine delivery devices.
Tomorrowland	Festival	Austria	Bans many forms of tobacco advertising, promotion and sponsorship. Regulates electronic nicotine delivery devices.
Velo	Nicotine pouches	Emilia Romagna (Italy)	Restricts tobacco advertising. Regulates electronic nicotine delivery devices.

Brand	Type	Races	Country regulations*
		Spain	Bans tobacco advertising, promotion and sponsorship. Regulates electronic nicotine delivery devices.
		Britain	Bans many forms of tobacco advertising, promotion and sponsorship. Regulates electronic nicotine delivery devices.
		Netherlands	Bans many forms of tobacco advertising, promotion and sponsorship. Regulates electronic nicotine delivery devices.
		Italy	Restricts tobacco advertising. Regulates electronic nicotine delivery devices.
Vuse	E-cigarette brand	Bahrain	Bans tobacco advertising, promotions and sponsorship. Different regulations apply to different electronic nicotine delivery systems and electronic non-nicotine delivery systems **
		Saudi Arabia	Restricts tobacco advertising, promotions and sponsorship. Regulates electronic nicotine delivery devices.
		Miami (U.S.A.)	Restricts tobacco advertising and sponsorships. Regulates electronic nicotine delivery devices.
		Monaco	None
		Azerbaijan	Bans tobacco advertising, promotions and sponsorship. Regulates electronic nicotine delivery devices.
		United States	Restricts tobacco advertising and sponsorships. Regulates electronic nicotine delivery devices.
		Mexico City	Bans many forms of tobacco advertising and promotion. Bans advertising and sale of electronic nicotine delivery devices.
		Abu Dhabi	Bans many forms of tobacco advertising, promotions and sponsorship. Regulates electronic nicotine delivery devices.

*According to the World Health Organization Report on the Global Tobacco Epidemic, 2021


**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 product, are imported under the e-shisha categorization.

Key Takeaways

- BAT used F1 to advertise its products and corporate slogans with race coverage reaching fans in countries where tobacco company sponsorships and e-cigarette advertising is banned or restricted.
- BAT also benefited from its F1 sponsorship through Vuse/McLaren-branded “Driven by Change” activities.
- The initiative gained extensive positive media coverage, including in arts, design and popular culture-focused media outlets BAT might not otherwise reach. It allowed BAT to associate itself with a positive philanthropic effort, which is a known industry tactic.

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5: Conclusion and Recommendations



This latest report in STOP's "Driving Addiction" series shows how insidious tobacco sponsorship in F1 is in helping cigarette companies reach potential customers and subvert national advertising restrictions. Even though annual spending was lower than in recent years, the industry was still able to gain significant benefits, including reaching millions of fans at the racetrack, via race coverage and social media content and accessing wider audiences via "Drive to Survive" and CSR activities. Unless tobacco sponsorship in F1 is banned, more opportunities will become available for cigarette companies to target F1's increasingly younger and more demographically diverse fanbase with addictive and harmful products.

F1's global expansion aligns with the industry's strategic objectives. More races were added to the calendar, including in areas that are current targets of the tobacco industry, such as the Eastern Mediterranean region and the U.S. TV viewership set records in key markets like France, Australia, Austria, the U.S. and Canada and is poised to grow in another key market for the tobacco industry, China.

The most shocking finding in this report is the amount of additional and effectively free advertising the cigarette giants secured through F1's deal with Netflix. "Drive to Survive" delivered more than a billion minutes of streamed content containing PMI or BAT-related branding and has further extended F1's reach to a broader audience, helping the industry get its messages into millions of homes and in front of young people.

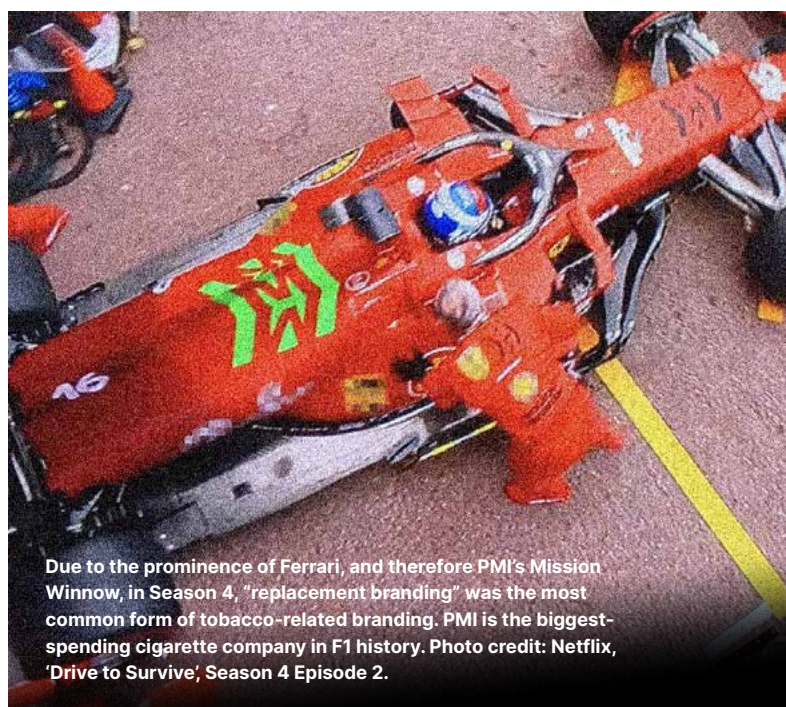
The significant exposure of tobacco brands in "Drive to Survive" may change in Season 5, as PMI's Mission Winnow branding did not appear on Ferrari cars during the 2022 season and McLaren underperformed in the season compared to 2021. However, BAT's continued partnership with McLaren means tobacco-related branding is still likely to be a major presence. In the 32-second teaser trailer for Season 5 that launched on January 13, 2023, a Vuse logo was clearly visible on the sidepod of one of the McLaren cars within the first five seconds.⁶⁵ Historic footage may also mean that PMI is still represented. With "Drive to Survive" renewed until Season 6, it will likely be a continuing source of exposure for F1's tobacco sponsors in the near future.

BAT also continues to benefit from the prominent exposure for its brands during race coverage, on social media and via joint activities with McLaren.

Until the FIA, the sport's governing body, permanently bans all tobacco sponsorship in F1, the sport will continue putting its fans at risk. F1 and Netflix are helping the industry reach its target demographics and markets, and subvert tobacco advertising, sponsorship and promotion bans in some countries. Governments, however, can take action and enforce local restrictions where appropriate.

Recommendations

- 1. To protect F1 fans and disassociate itself from an industry whose products cause 8 million deaths per year, the FIA must fully and permanently ban all tobacco sponsorship in F1.**
- 2. Governments and health advocates should monitor F1 for breaches of national regulations.**
- 3. Governments should have Netflix remove the program in places where it violates national restrictions on tobacco advertising. Where regulations are unclear, they should tighten restrictions on tobacco advertising, promotion and sponsorship to make them fully comprehensive, covering all tobacco and nicotine products and all activities and platforms (TV, film, streamed content, gaming platforms, social media, and event and team sponsorships).**
- 4. Governments must hold the industry, the sport and broadcasters to account, by taking action against violations of tobacco advertising, sponsorship and promotion bans.**



Due to the prominence of Ferrari, and therefore PMI's Mission Winnow, in Season 4, "replacement branding" was the most common form of tobacco-related branding. PMI is the biggest-spending cigarette company in F1 history. Photo credit: Netflix, 'Drive to Survive', Season 4 Episode 2.

Appendices

Appendix A: History of Tobacco Sponsorship in F1

The tobacco industry has had a presence in F1 since 1968 and all “Big Four” global cigarette companies are present in the list of the industry’s biggest spenders in F1. PMI is the biggest spender by far. BAT is expected to move into second position in the 2023 season.

The Biggest-Spending Tobacco Companies in F1 History, 1968-2022

Company	Main brands	Est. value
Philip Morris/Altria	Marlboro, Mission Winnow	\$2,351.7m
Japan Tobacco	Mild Seven	\$481.2m
British American Tobacco	Lucky Strike, 555, Velo, Vuse	\$455.9m
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
TOTAL		\$4,557.9m

Notes:

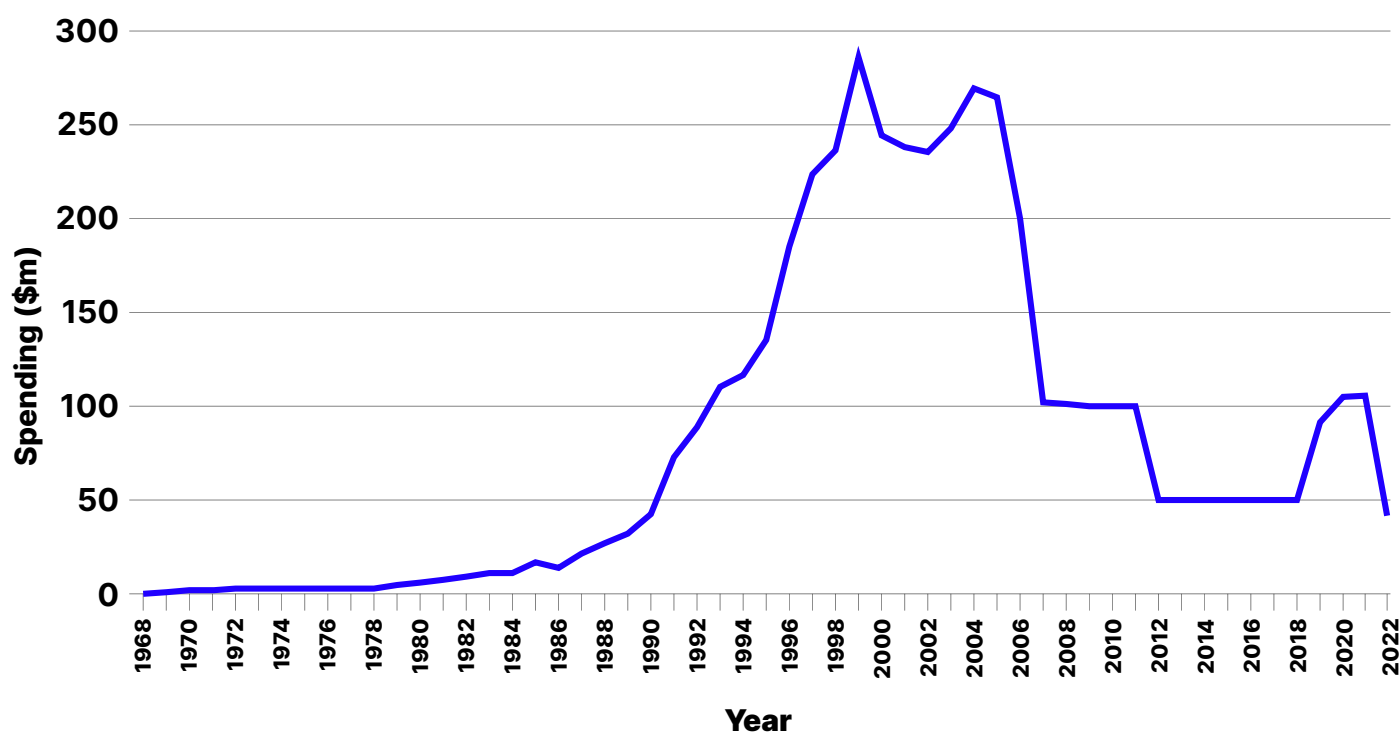
Covers team title sponsorships, other major team sponsorship deals, race title sponsorships and major trackside advertising packages. Estimates are conservative due to the difficulty of accurately identifying all trackside advertising packages at older races due to more limited availability of race footage and photographs. Some minor team sponsorships may also not be included.

In some cases, cigarette 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.

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

Tobacco Company Spending on F1 by Year

The value of tobacco sponsorship in F1 hit its lowest point since 1989 in 2022. PMI's reduction in spend from an annual \$75 million to an estimated \$10 million meant that overall spending by the sector came in at just \$40 million, including BAT. The decline in 2006 is linked to the FIA's proposed ban, weakened to a recommendation, that tobacco sponsors should be removed from the sport. The uptick in 2018-2019 relates to an increase in sponsorship spend, with PMI branding coming back to the Ferrari team cars and BAT reentering the sport.



Philip Morris International and F1

The 2022 season marked a turning point in the history of F1 tobacco sponsorships. For the first time since 1971, Philip Morris International (PMI) was not a major sponsor of the sport. Although PMI was still a partner of Ferrari, its logos and designs no longer appeared on the team's cars and its Mission Winnow brand was shifted down the ranking of Ferrari's list of partners.

Despite speculation during 2021 that the partnership would end completely, Ferrari team principal, Mattia Binotto, was quick to rebut that idea when Mission Winnow disappeared from the official team name in December 2021: "It's not called any more Scuderia Ferrari Mission Winnow, but only Scuderia Ferrari," he explained. "But still, there are many opportunities on which we may collaborate with them, keeping them as partners. We have various options on the table at the moment and we are still talking."⁶⁶

When the new Ferrari race car launched in February 2022, neither PMI nor Mission Winnow appeared on Ferrari's list of sponsors and had no branding on the car. Unlike the 2020 season, when Mission Winnow's logos disappeared from the livery, the spots were filled with branding for other sponsors, most prominently Spanish bank, Santander.

In addition to this, Mission Winnow removed all mentions of Ferrari and Ducati, the MotoGP motorcycling team it sponsored, from its website. A rather cryptic statement said: "Partnerships are meant to transform and bring change. Mission

Winnow remains focused on bringing partnerships closer to you, through projects and experiences."⁶⁷ It promised that "news will follow in due course."

When the F1 season began on March 20, there were still no Mission Winnow logos on the cars. However, by April 2, Mission Winnow was once again listed as a partner on the Ferrari website,⁶⁸ although no official announcement had been made. When questioned on the development, Binotto told Motorsport.com⁶⁹ that "it's important to know that it has been a long partnership with Philip Morris, and we are very proud of it, and very happy that it's still lasting [...] Yes, it has changed a bit in the way the partnership is set up, without going into too many details. But in the end, it's more important to make sure that it was continued."

Mission Winnow was featured among mid-level sponsorship deals such as Amazon Web Services, Richard Mille and Estrella Galicia, which are believed to pay around \$5-10 million annually.

Exactly what PMI gained from this partnership in 2022 is not fully clear, but it is likely that it still had hospitality packages at races and co-branding opportunities where Ferrari's brand and images may have appeared on its promotions. These are standard benefits for even the smallest F1 sponsors. PMI remains a sponsor in 2023, following the same template as 2022 and continuing one of the longest relationships in the sport.

"But still, there are many opportunities on which we may collaborate with them, keeping them as partners.
We have various options on the table at the moment and we are still talking."

– Mattia Binotto, Ferrari team principal

The Longest Standing Sponsorships in F1

PMI is one of the oldest sponsors in F1. Marlboro joined the sport in 1972, as a sponsor of the BRM team, moving to Ferrari a year later. As a result, as of 2022, PMI's relationship with Ferrari was the second-longest deal in the sport.

	Brand	Category	Team	Start date	Est. 2022 spend
1	SKF	Automotive	Ferrari	1950	\$2m
2	Philip Morris International	Tobacco	Ferrari	1973	\$10m
3	Brembo	Automotive	Ferrari	1994	\$2m
4	Shell	Energy and Chemicals	Ferrari	1996	\$35m
5	Mazak Machine Tools	Manufacturing	McLaren	1999	\$0.5m
6	OMR	Automotive	Ferrari	2000	\$4m
7	Iveco	Automotive	Ferrari	2001	\$1.5m
=	NGK	Automotive	Ferrari	2001	\$2m
=	Walter Meier	Manufacturing	Alfa Romeo	2001	\$0.2m
10	Brütsch-Rüeggler	Manufacturing	Alfa Romeo	2002	\$0.1m

Source: Formula Money Sponsorship Database

PMI'S F1 SPONSORSHIPS

Soon after entering the sport, Marlboro became the title sponsor of McLaren, leading to the iconic cigarette pack-inspired liveries that adorned the cars driven by champions such as Alain Prost and Ayrton Senna. That deal ended in 1996 when PMI dumped the then-struggling McLaren and poured more money into Ferrari, enabling the team to hire world champion Michael Schumacher and develop a car that would win five straight titles between 2000 and 2004.

PMI also took advantage of opportunities to advertise on the sides of tracks and sponsor race titles in key markets.

Team/race	Type	Years
BRM	Team	1972-1973
Ferrari	Team	1973-present
McLaren	Team	1974-1996
British GP	Race	1979-1983, 1985
Alfa Romeo	Team	1981-1983
Hungarian GP	Race	1992-2005
Spanish GP	Race	1994-2005
Argentine GP	Race	1995-1998
Brazilian GP	Race	1999-2001

Source: Formula Money Sponsorship Database

Although tobacco sponsorship was effectively outlawed in F1 in 2006, PMI continued with Ferrari. In 2007 the Marlboro decals were replaced with a barcode design which was reminiscent of the actual tobacco branding, however by 2010 this had also been switched for a Ferrari team logo with a red and white background. The car remained the slightly brighter red of Marlboro cigarette packets, rather than reverting to its original slightly darker shade.

Marlboro was the only cigarette brand to continue its sponsorship of a team after the end of 2006—and PMI was the only tobacco sponsor left in the sport until British American Tobacco joined McLaren in 2019. However, it ended its trackside advertising and race title sponsorship deals at the end of 2005.

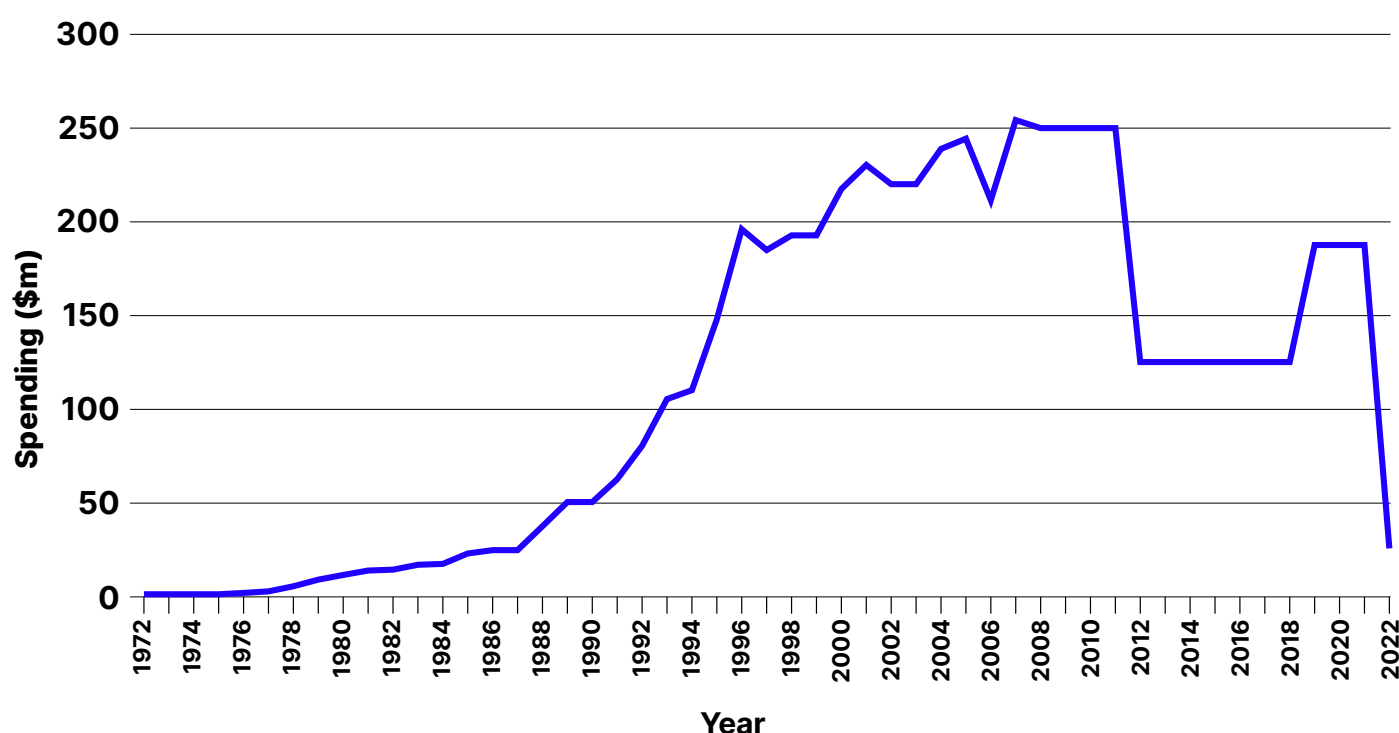
In 2018 PMI launched Mission Winnow, a vague initiative connected to its misleading “transformation” narrative, seeking to reframe PMI as a technology-led company investing in new electronic products rather than one of the world’s biggest cigarette companies. PMI’s CEO André Calantzopoulos said that “through Mission Winnow we want to let the world know how we have changed, to share our pride in

the transformation that people of PMI have achieved as well as our dedication to rigorous science and innovation that can lead to a better future.”

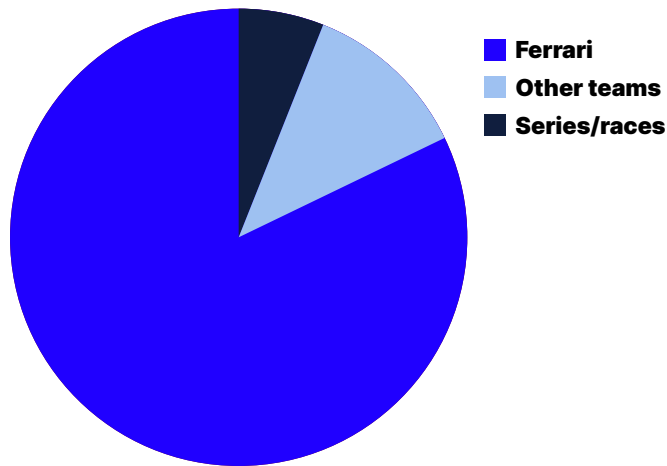
However, some observers thought that the design and color of the branding was reminiscent of Marlboro logos. An article in the British Medical Journal⁷⁰ declared that “Mission Winnow is ‘smokescreen’ marketing, covertly advertising tobacco products, with much in common with Philip Morris’s earlier Marlboro barcode livery.”

PMI’s sponsorship of Ferrari has been considered one of the most successful sponsorships in the sport and a model for other companies. In 2005, Gary Carey, then head of sponsorship at British American Tobacco, commented that BAT’s Lucky Strike was “pretty much a small brand in comparison to the likes of Marlboro so we saw Formula One as being able to enhance that premium positioning for us.”⁷¹ BAT found that F1 viewers “remember advertisements seen on the race track billboards and on the cars themselves. [...] In some cases the car takes the name of the sponsor i.e. the Benson & Hedges car, the Marlboro car.”

PMI'S SPENDING ON F1 BY YEAR



PMI'S SPENDING ON F1 BY TEAM/ RACE



DATA FOR PIE CHART

Ferrari	82.1%
Other teams	11.9%
Series/races	6.0%

Source: Formula Money Sponsorship Database

British American Tobacco in F1 2022: Further Detail

In contrast to PMI, BAT's brands continued to feature on McLaren team cars through the 2022 season. The following table details where brands featured at each race.

BAT found that F1 viewers "remember advertisements seen on the race track billboards and on the cars themselves. [...] In some cases the car takes the name of the sponsor i.e. the Benson & Hedges car, the Marlboro car."

Race	Branding location						
	Sidepod	Front wing	Endplate	Nose	Halo	Cockpit side	Overalls
Bahrain	Vuse	Vuse	Vuse	Vuse	Vuse	-	A Better Tomorrow
Saudi Arabia	Vuse	Vuse	Vuse	Vuse	Vuse	-	A Better Tomorrow
Australia	OTR	OTR	OTR	OTR	OTR	-	-
Emilia Romagna	Velo	Velo	Velo	Velo	Velo	-	Accelerating Transformation
Miami	Vuse	-	Vuse	Vuse	Vuse	-	Accelerating Transformation
Spain	Velo	Velo	Velo	Velo	Velo	-	Accelerating Transformation
Monaco	Vuse	Vuse	Vuse	Vuse	Vuse	-	A Better Tomorrow
Azerbaijan	Vuse	Vuse	Vuse	Vuse	Vuse	-	-
Canada	Circle K	Circle K	Circle K	Circle K	Circle K	-	-
Britain	Velo	Velo	Velo	Velo	Velo	-	-
Austria	Tomorrowland	-	Love	Tomorrowland	Love	-	-
France	EG Group	EG Group	EG Group	EG Group	EG Group	-	-
Hungary	Autogrill	Autogrill	Autogrill	Autogrill	Autogrill	-	-
Belgium	Press Shop & More	Press Shop & More	Press Shop & More	Press Shop & More	Press Shop & More	-	-
Netherlands	Love	Velo	Velo	Velo	Velo	-	-
Italy	Velo	Velo	Velo	Velo	Velo	-	-
Singapore	-	Oxxo	Oxxo	Oxxo	Oxxo	Oxxo	-
Japan	-	A Better Tomorrow	A Better Tomorrow	A Better Tomorrow	A Better Tomorrow	A Better Tomorrow	-
United States	Vuse	Vuse	Vuse	Vuse	Vuse	-	-
Mexico City	Vuse	Vuse	Vuse	Vuse	Vuse	-	-
São Paulo	AM PM	AM PM	AM PM	AM PM	AM PM	-	-
Abu Dhabi	Vuse	Vuse	Vuse	Vuse	Vuse	-	-

Appendix B: "Drive to Survive": Additional Details on Methodology and Findings

Measuring Tobacco Exposure in "Drive to Survive"

To monitor the level of tobacco-related branding broadcast through "Drive to Survive" Season 4, Formula Money chose to adapt an industry standard method that has frequently been applied in outlets such as the British Medical Journal to measure tobacco and alcohol branding exposure.

This method involves dividing the broadcast into one-minute segments and tallying how many of these segments include the presence of tobacco or tobacco branding. This is usually split into five categories: actual tobacco use; implied tobacco use; tobacco paraphernalia; other references to tobacco (e.g. verbal mentions); and tobacco brand appearance.⁷²

In the case of "Drive to Survive" Season 4, all instances of tobacco fit into the fifth category, tobacco brand appearance. Formula Money therefore developed new categories suited to the "Drive to Survive" broadcast to show the range of tobacco branding shown during the programming. This involved three different categorization methods:

BY CATEGORY OF BRANDING		
Type	Description	Examples
Tobacco products	Commercially available tobacco and nicotine products	Vuse, Velo, West, Camel
Replacement branding	Branding replacing tobacco brands on the cars and clothing that bears a resemblance to the tobacco brands	Mission Winnow, A Better Tomorrow, Mika
Slogans	Slogans from the tobacco companies that do not resemble their tobacco products	Accelerating Transformation
Partner brands	Independent brands featured on the McLaren instead of BAT branding. Most of these are retail outlets that stock BAT products.	Autogrill, Dufry, OXXO

BY LOCATION OF BRANDING		
Type	Description	Examples
Car	On-car branding including steering wheel	-
Drivers	Driver clothing including overalls, helmet, shirts, caps	-
Team boss	Team principal's clothing	-
Team	Team clothing including overalls	-
Equipment	Equipment used by the team such as pit stop equipment	-
Locale	Branding in team areas such as the motorhome, branding boards and team signage	-
Circuit	Branding at the circuit outside team areas, excluding trackside advertising	-
Trackside advertising	Trackside advertising and podium branding	-
Fans	Branding on fan clothing and accessories, including shirts, caps and banners and flags, whether official or homemade	-

BY TOBACCO COMPANY		
Type	Description	Examples
Philip Morris International	-	Mission Winnow, Marlboro
British American Tobacco	-	Velo, Vuse, A Better Tomorrow, Accelerating Transformation
BAT partners	-	Autogrill, Dufry, OXXO
West	-	West, Mika
Gitanes	-	Gitanes
Rothman's	-	Rothman's
Camel	-	Camel

In total, 416 minutes of "Drive to Survive" Season 4 were analyzed for tobacco branding.

"Drive to Survive" Season 4: Episode-by-Episode Breakdown

The table below shows the distribution of tobacco branding between episodes of Season 4. Segments that included tobacco-related branding are marked with an "X"; tobacco-free segments are marked with a ".". Empty cells indicate that the episode was a shorter length.

Minute	Episode									
	1	2	3	4	5	6	7	8	9	10
0	X	X	.	.	X	X	.	.	.	X
1	.	X	.	.	X	X	X	.	X	.
2	X	X	X	X	.	.	.	.	.	.
3	.	.	X	.	X	.	.	.	.	.
4	X	.	.	.	X	.	.	X	.	X
5	X	.	X	.	X	.	.	.	.	X
6	X	.	X	.	X	.	.	.	.	X
7	X	.	X	X	.	.	.	.	X	X
8	X	.	X	.	X	.	.	.	.	.
9	X	X	X	.	.	.	.	X	.	.
10	.	X	X	.	X	.	.	X	.	.
11	.	X	X	X	X	.	.	X	.	.
12	.	X	.	.	X	.	X	.	.	X
13	.	X	X	.	.	.	.	.	.	.
14	.	X	X	.	X	.	.	.	.	.
15	.	X	X	.	X	.	.	.	.	.
16	.	X	.	.	X	.	.	.	.	X
17	X	X	.	.	X	X	.	.	X	.
18	X	X	.	X	X	.	.	.	X	.
19	X	X	X	.	X	.	.	.	.	X
20	.	X	.	X	X	X	.	.	.	.
21	.	X	.	.	X	.	.	.	.	.
22	.	X	.	.	X	.	.	.	.	X
23	X	X	.	.	X	.	.	X	.	X
24	.	X	.	.	X	.	.	.	X	.
25	X	X	.	.	X	.	.	.	.	.
26	X	X	.	.	X	.	.	.	.	.
27	.	.	X	.	X	X	X	.	.	.
28	X	X	.	X	X	.	.	.	.	.
29	.	X	.	.	X	.	.	.	.	.
30	X	X	.	X	X	.	.	.	.	.
31	.	X	.	X	X	.	X	.	.	.
32	.	X	.	.	X	.	.	.	X	.
33	.	X	.	.	.	.	.	.	X	.
34	.	X	.	X	.	X	.	.	.	.
35	.	X	.	X	.	.	.	X	.	X

Minute	Episode									
	1	2	3	4	5	6	7	8	9	10
36	.	X	.	.		.	.	.	.	.
37	X	X	.	.				.	X	.
38	.	X	.	X				.	X	.
39		X	X	.				.	.	.
40		X	.					.	.	.
41		.	.					.	X	X
42			.					.	.	.
43			.						X	X
44			X						X	.
45			X						.	.
46			.						.	
47									.	
48									.	
49									.	
50									.	
51									.	
Total mins	39	42	47	40	34	37	37	43	52	46
Tobacco mins	17	34	17	11	29	6	4	6	12	13
% tobacco related	43.6%	81.0%	36.2%	27.5%	85.3%	16.2%	10.8%	14.0%	23.1%	28.3%

“Drive to Survive” Season 4: Tobacco Exposure by Category

The most prominent category of tobacco-related branding during Season 4 of “Drive to Survive” was replacement branding, appearing in 102 minutes (representing more than half of tobacco-related branding). This was due to the prominence of Ferrari in the programming and therefore Mission Winnow, which was more ubiquitous than McLaren’s BAT brands. One reason for this was the Mission Winnow logos on the Ferrari drivers’ shirts and caps which were highly visible in their studio interviews. BAT did not have equivalent branding on the McLaren drivers’ clothing.

Branding for actual tobacco and nicotine products was the second-most prominent category (63 minutes) due to the high visibility of Vuse and Velo, and also some brands that featured in historic race footage.

Only 16 minutes featured BAT’s partner retail brands and six of those minutes also showed branding for cigarette company brands and slogans.

Episode	Theme	No. of minutes with tobacco				
		Tobacco products	Replacement branding	Slogans	Partner brands	Total*
Episode 1	Season Introduction	7	14	1	0	17
Episode 2	McLaren v Ferrari	16	29	1	5	34
Episode 3	Title Battle	2	15	1	0	17
Episode 4	Haas	3	6	0	4	11
Episode 5	McLaren v Ferrari	18	11	9	2	29
Episode 6	Williams	4	1	0	1	6
Episode 7	Young Drivers	0	1	0	3	4
Episode 8	George Russell	4	2	1	1	6
Episode 9	Title Battle	3	11	0	0	12
Episode 10	Abu Dhabi	6	12	0	0	13
TOTAL		63	102	13	16	149

* Total minutes may be less than the total of each row as some one-minute segments may show branding from multiple categories (e.g. both Vuse and Mission Winnow).

"Drive to Survive" Season 4: Tobacco Exposure by Location

The most common location of branding seen during Season 4 was on the cars, closely followed by the drivers' clothing. The former appeared mostly in the footage of on-track action, including on-board cameras, while the latter largely encompassed interviews but also footage from the grid and paddock.

Episode	Theme	No. of minutes with tobacco									
		Car	Drivers	Team boss	Team	Equipment	Locale	Circuit	Trackside	Fans	Total
Episode 1	Season Introduction	10	11	4	3	0	2	1	0	1	17
Episode 2	McLaren v Ferrari	19	28	3	6	0	1	1	0	0	34
Episode 3	Title Battle	7	14	4	7	2	0	0	0	0	17
Episode 4	Haas	9	3	1	1	0	1	0	1	0	11
Episode 5	McLaren v Ferrari	20	14	2	2	0	0	0	0	2	29
Episode 6	Williams	5	2	0	1	0	0	0	2	0	6
Episode 7	Young Drivers	3	1	0	0	0	0	0	0	0	4
Episode 8	George Russell	4	1	0	2	0	2	0	0	0	6
Episode 9	Title Battle	9	7	3	5	0	0	0	0	1	12
Episode 10	Abu Dhabi	8	6	3	4	0	0	0	0	0	13
TOTAL		94	87	20	31	2	6	2	3	4	149

* Total minutes may be less than the total of each row as some one-minute segments may show branding in multiple locations (e.g. the driver overalls and cars in footage of the grid).

"Drive to Survive" Season 4: Tobacco Exposure by Company

Episode	Theme	No. of minutes with tobacco							
		PMI	BAT	BAT partners	West	Gitanes	Rothman's	Camel	Total
Episode 1	Season Introduction	14	8	0	0	0	0	0	17
Episode 2	McLaren v Ferrari	21	22	5	0	0	0	0	34
Episode 3	Title Battle	15	3	0	0	0	0	0	17
Episode 4	Haas	7	2	4	1	0	0	0	11
Episode 5	McLaren v Ferrari	9	23	2	1	0	0	0	29
Episode 6	Williams	4	1	1	2	1	1	2	6
Episode 7	Young Drivers	1	0	3	0	0	0	0	4
Episode 8	George Russell	3	3	1	0	0	1	1	6
Episode 9	Title Battle	11	4	0	0	0	0	0	12
Episode 10	Abu Dhabi	12	7	0	0	0	0	0	13
TOTAL		97	73	16	4	1	2	3	149

* Total minutes may be less than the total of each row as some one-minute segments may show branding from multiple cigarette companies (e.g. a Rothman's-branded Williams passing in front of Marlboro trackside advertising).

“Drive to Survive” Season 4: Audience

Assuming that viewing was distributed evenly throughout the series, the 57 million hours (3.4 billion minutes) of Season 4 that were consumed equate to 1,142,881,200 minutes containing tobacco-related content (with an additional 82.1 million minutes showcasing BAT’s retail partners). This is a significant amount of content in a popular show.

Dividing the total minutes watched by the number of minutes in Season 4 (416 minutes) and assuming that every viewer watched every episode once implies that the season had 8,225,481 viewers globally in its first two weeks of availability. This is a very conservative estimate as it does not include other members of the household who may have been watching at the same time or viewers who watched outside the first two weeks.

However, it is extremely unlikely that viewing was split so evenly between individuals with every viewer consuming the entire series. While some mega-fans may have watched content multiple times, others may have tuned out during the first episode after realizing that the series wasn’t for them, while some may have simply not had time to watch all the content they wanted to during the first two weeks.

Assuming conservatively that on average each viewer watched 25% of the whole season gives an estimated total audience for the series of 32,901,923 viewers. Dividing the total number of tobacco minutes by this number implies that each viewer was exposed to 34.7 minutes of programming containing tobacco-related content.

The actual amount of tobacco-related content consumed by viewers is likely to be even higher. Viewers are most likely to watch episodes consecutively, therefore those who only partially watched Season 4 are more likely to have viewed the earlier episodes than the later ones. Although 33.4% of minutes contained tobacco-related content across the whole season, this rose to 53.7% during the first half of the season only (and 19.1% in the second half). The first episode—the most likely episode for casual viewers to watch—recorded 43.6%.

“Drive to Survive” Viewership by Season

Key European Markets

Season	No. of households	
	Key European markets*	U.K. only
Season 1	8.218m	2.141m
Season 2	6.479m	1.507m
Season 3	5.234m	1.469m
Season 4	5.861m	2.248m
TOTAL	25.792m	7.365m

* Covers U.K., Spain, Italy, Germany and France in first 28 days of availability

Source: Digital-i

Branding for actual tobacco and nicotine products was the second-most prominent category (63 minutes) due to the high visibility of Vuse and Velo, and also some brands that featured in historic race footage.

Appendix C: Methodology

Sponsorship

Sponsor definitions

- The Formula Money list of partners corresponds to that on the teams' websites, communications material by the teams or sponsors, and on lists of sponsors provided to Formula Money by the teams. Companies that have branding on the cars/driver-wear, but are not referenced as sponsors in one of these contexts are not included on our 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 the sponsorship only is listed, not the total team owner spend 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 team owner spend.
- 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

- Very few actual F1 sponsorship values are publicly available. Formula Money's estimates are based on detailed examination of a number of 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, Formula One Group company documents reveal total series sponsorship and advertising for the seasons and Formula Money makes 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 categorized 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 classed under Fashion & Beauty rather than Telecoms & Technology because its partnership with the Toro Rosso team is focused on its watch brand.



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STOP is a global tobacco industry watchdog whose mission is to expose the tobacco industry tactics that undermine public health. Comprised of a network of academic and public health organizations, STOP researches and monitors the tobacco industry, shares intelligence to counter its tactics, and exposes its misdeeds to a global audience. STOP is funded by Bloomberg Philanthropies as part of the [Bloomberg Initiative to Reduce Tobacco Use](#).

For more information, visit exposetobacco.org.

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