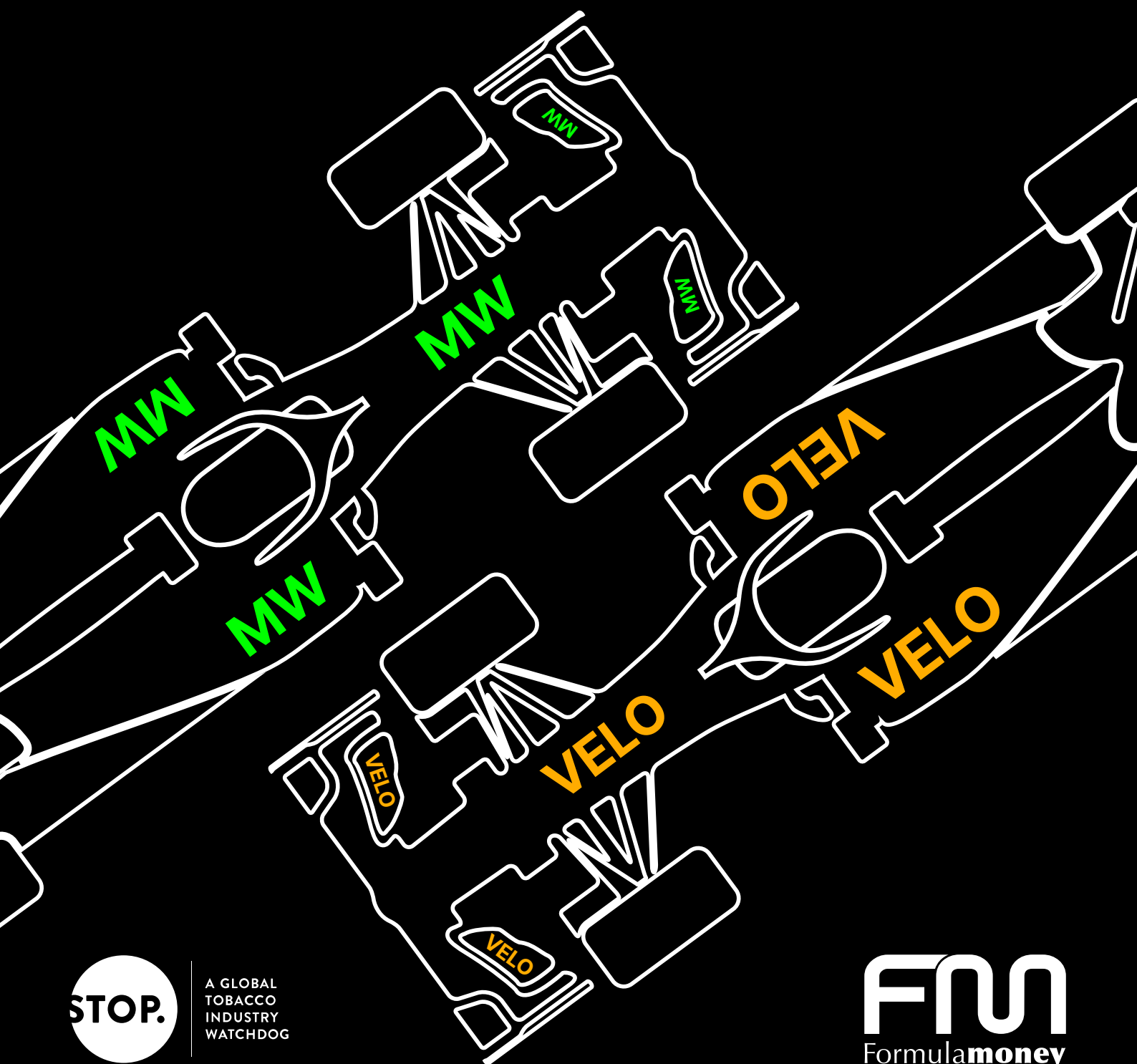


DRIVING ADDICTION

Tobacco Sponsorship in Formula One, 2021



A GLOBAL
TOBACCO
INDUSTRY
WATCHDOG



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Executive Summary

In 2020, as Formula 1 celebrated its 70th anniversary, STOP exposed the scale of one of the sport's greatest scandals: It had made an estimated \$4.5 billion to date from tobacco companies. STOP and Formula Money revealed that Philip Morris International (PMI) and British American Tobacco (BAT) collectively had been increasing their spending since 2019 to promote their brands and addictive products to F1's worldwide fan base. STOP expressed alarm about the resurgence of Big Tobacco in the sport, the potential impact on younger fans and how the sponsorships are in conflict with both a global treaty and the United Nations Sustainable Development Goals (SDGs).

The 2021 report reveals how tobacco companies are continuing to exploit their links to the sport as F1 expands its promotional activities to increase its appeal to younger audiences and new countries are added to the race calendar. PMI and BAT have pushed tobacco sponsorship to its highest levels since 2006. Together, they are spending an estimated \$105 million on F1 sponsorship in the 2021 season. This is on par with 2020, with total spending estimated at \$75 million from PMI and \$30 million from BAT.

It is money the tobacco companies may consider well spent. The \$30 million spent by BAT in 2020 earned an estimated \$54 million in on-screen exposure for its brands, according to exclusive analysis carried out on behalf of STOP. Much of this exposure was seen by the young demographics the tobacco industry desperately wants to reach.

Races themselves are hugely valuable gatherings which, when not under COVID restrictions, allow social media influencers, politicians, celebrities, royalty and sports stars to mingle and offer sponsors opportunities for corporate hospitality. F1 events provide the forums for access, as well as brand exposure, that tobacco firms crave and utilize.

Tobacco sponsorship conflicts with F1's commitments to the United Nations

In 2001 it appeared that the sport's governing body, the Fédération Internationale de l'Automobile (FIA), had caught up with the rest of the sporting world when it announced that it

was acting to end tobacco sponsorship by the end of the 2005 season. Yet PMI maintained its relationship with Ferrari after this date and started advertising on the cars once again in 2018. This report estimates that PMI has spent more than \$2 billion on F1 sponsorship over the years. BAT re-joined the sport in 2019.

Formula 1, the most visible of the FIA's competitions, is owned by Liberty Media. The company and the FIA are working to grow F1's audience by adding new countries to the race calendar, extending into e-sports, forming new media partnerships and increasing the sport's social media presence. As Big Tobacco is excluded from advertising and sponsorship in nearly all sports, it eagerly turns to F1 to exploit this global footprint.

A global treaty on health, the World Health Organization Framework Convention on Tobacco Control (WHO FCTC), obliges governments to end all tobacco advertising, promotions and sponsorships; implementation of the treaty is also a target in the SDGs.

Every cent of tobacco companies' brand exposure in F1 in the fifteen years since the sport failed to fully remove all tobacco advertising and sponsorship undermines the treaty and national bans on tobacco advertising. While FIA leadership talks about its commitment to the SDGs and being "Purpose Driven," more young people in more countries are now being exposed to tobacco company brands because of F1.

Tobacco companies are reaching F1's young fans

PMI and BAT have used non-traditional brands to claim they are not in breach of the sponsorship ban. PMI created the Mission Winnow brand, which it says is about an aspiration to transform the company. BAT has also promoted corporate slogans such as "A Better Tomorrow." Yet trademarks for both slogans are associated with tobacco products. In addition, BAT has explicitly promoted its nicotine pouch brand Velo and e-cigarette brand Vuse.

This branding does not feature at every race, particularly in countries with strong national regulations against tobacco advertising and sponsorship. For instance, PMI removed Mission Winnow branding from the Ferrari cars in some European countries in 2021. Yet the same F1 fans protected by strong laws in their own country are then exposed to tobacco branding by coverage of races from other countries, and in promotional and marketing activity by the sport, the teams and their tobacco sponsors.

It is a conflict the FIA does not, so far, appear to be willing to confront.

F1 claims it has 433 million unique global viewers for its races. BAT's brands on the McLaren cars, with the team's podium finishes and battles for pole position, ensure plenty of screen time. According to analysis carried out on behalf of STOP, the Velo brand alone earned an estimated \$36 million in exposure.

That exposure is increasingly among a younger demographic. Two-thirds of fans are aged under 45 and the majority of new fans are aged under 35. A third of them are under 25. These fans are heavily engaged on social media. Followers of F1 on the major platforms increased by 36% in 2020. Views of F1 video content increased by 47% and total engagement nearly doubled.

The Netflix show "Drive to Survive" has also been identified as a key factor in increasing F1's youth appeal. And as PMI and BAT have invested heavily in their F1 presence, their branding can appear ubiquitous when McLaren and Ferrari are seen in coverage of the sport, on social media and in the Netflix show—even in an image on a news program for children.

From music festivals to competitions, driver conversations to glamorous parties, the STOP report sets out examples of these tobacco companies using every channel to exploit their F1 links, reaching young consumers. Where it cannot ensure its brand is featured, such as in the official F1 driving game, BAT creates an alternative: BAT and McLaren launched their own e-sports initiative, Velo Eseries, pitting celebrities against influencers.

Tobacco companies want to recruit new, young customers for their products: F1 once again finds itself complicit in this effort.

Conclusion

Tobacco sponsorship of F1 is now at a level comparable with 2006, when the sport supposedly banned such activity. It shows no sign of slowing as it rides F1's mission to expand its global reach. Indeed, F1 has given tobacco a license to be present on more platforms and in more venues than it could ever achieve on its own.

F1 still hasn't been able to shake its addiction to Big Tobacco's money and the price may be paid by a new generation of young race enthusiasts across the globe.

But there's an opportunity for change, as the sport elects a new President of the FIA in December 2021. STOP's message for the presidential candidates is clear: To protect the future of the sport's young fanbase, F1 must end all tobacco sponsorship and stop driving addiction.

Key Findings

Spending remained at the highest levels since 2006

- Tobacco companies Philip Morris International (PMI) and British American Tobacco (BAT) will spend an estimated \$105 million on Formula 1 in 2021. This is the same amount they spent in 2020,¹ which itself marked the highest spending in the sport by tobacco companies since 2006.
- This comprised an estimated \$75 million spent by PMI on Ferrari sponsorship and \$30 million spent by BAT on McLaren sponsorship.
- PMI increased its lead as the biggest-spending tobacco company in F1 history. It has now spent an estimated total of \$2.3 billion on the sport, more than half the total \$4.5 billion spent by all tobacco companies on F1.

Big Tobacco sponsorship was a good bet for exposure to F1 fans

- Throughout the 2020 season, BAT branding on the McLaren cars received exposure from race broadcasts alone that was calculated to be worth around \$54 million if the time on-screen had been bought as traditional TV advertising slots.
- This was almost triple the estimated \$19 million exposure BAT brands received in 2019. The increase was driven by a number of factors including increased BAT branding on the McLaren cars, more frequent use of BAT's own brands (less frequently replaced by, for example, partner brands) and the improved performance of the McLaren team resulting in increased broadcast exposure.
- The most-exposed BAT brand featured on the McLarens in 2020 was Velo, BAT's nicotine pouch product brand. Velo received exposure from race broadcasts worth an estimated \$36.7 million.
- BAT-associated brands, such as Dufry, which operates duty-free and duty-paid shops and convenience stores at retail hubs, also received race broadcast exposure worth an estimated \$7.5 million from the BAT/McLaren partnership, when this brand replaced BAT branding at some races.

- After a Ferrari team launch event for the 2020 car where PMI's Mission Winnow brand featured prominently, securing significant media coverage, the brand then did not appear on the Ferrari cars in 2020, though PMI remained the main sponsor of the team and did promote Mission Winnow extensively on social media, through major announcements and more. The missing branding itself resulted in media coverage for PMI and Ferrari. The brand has returned to the car in 2021.

More young people are seeing BAT and PMI brands via F1

- Interest in F1 among young adults is growing. Data from IPSOS found that 61% of new F1 fans are aged under 35, and 36% under 25. This makes F1 a very attractive proposition for sponsors looking to target that demographic.
- With an estimated 38% of its fans aged 18-24, McLaren has the youngest fan base of any team, except AlphaTauri. This gives the team a far younger demographic than F1 itself which has only 32% of fans in the age 18-24 demographic.
- Similarly, among F1 drivers McLaren driver Lando Norris attracts the fourth-highest percentage of fans aged 18-24—38.9% of his fans are in this demographic. His McLaren teammate, Daniel Ricciardo, is in seventh place among this age group—the highest-placed driver aged over 30.

Tobacco companies are finding new ways to promote their brands beyond the track

- Data shows that almost all users who directly engage with @MissionWinnow on social media are aged 34 or under.
- Quirky Q&As with drivers and promotions, such as digital wallpaper giveaways, are very popular with young adults engaging with Mission Winnow on social media. Ferrari's Mission Winnow giveaway even appeared to have attracted the attention of a fan aged under 18.
- Analysis of search data shows that interest in Mission Winnow spikes during Grands Prix weekends and during major announcements about the Ferrari team.
- The controversial green Mission Winnow logo that debuted on the Ferrari cars in 2021 generated a great deal of interest in the brand. Google searches for Mission Winnow hit their highest level of 2021 by far around the time of the launch of the livery.
- BAT has used social media to associate its McLaren partnership with music-focused initiatives that appeal to young adults. This includes a partnership with the Tomorrowland festival and a Velo-sponsored British Grand Prix afterparty.
- Gaming has also been a big draw for BAT and it launched a Velo-sponsored celebrity e-sports series with McLaren in early 2021. This circumvented restrictions on the official Formula 1 video game which does not show tobacco-related brands on the digital representations of the cars.

TOBACCO-RELATED BRANDS IN F1 IN 2021

Brand	Company	Team	Type of brand
Mission Winnow*	PMI	Ferrari	PMI corporate initiative
A Better Tomorrow*	BAT	McLaren	BAT slogan
Accelerating Transformation*	BAT	McLaren	BAT slogan
Velo	BAT	McLaren	BAT nicotine pouch product
Vuse	BAT	McLaren	BAT e-cigarette product

*This has been registered as a trademark in respect to tobacco products as well as next generation products.

1. TOBACCO SPONSORSHIP IN 2021: THE STORY SO FAR

In the first half of the 2021 season, the tobacco companies involved in Formula One were highly visible. After being mostly absent from the Ferrari cars for most of the previous season, PMI's Mission Winnow—the PMI-owned brand, whose international trademark registration still appears to associate the brand with tobacco products, including cigarettes²—was back with a luminous green logo which attracted significant attention and media coverage simply because it looked so out-of-place on the scarlet Ferraris.

PMI spokesperson Tommaso Di Giovanni told journalists³: “Regardless of opinions about the color, sparking debate and creating dialogue is exactly what Mission Winnow is meant to do. We have consistently encouraged people to place their preconceptions about our company aside and to open their mind to the transformation we are going through.” This confirms that Mission Winnow is designed to promote PMI and its transformation messaging. It diverts attention from the fact that PMI continues to sell hundreds of billions of cigarettes every year.

The green Mission Winnow branding appeared on the Ferrari cars for the first six races of the season before being removed at the French Grand Prix. Riccardo Parino, Vice President of Global Partnerships at PMI said⁴: “The Mission Winnow logo will not be featured on the Scuderia Ferrari livery during races in the EU, starting with the French Grand Prix this weekend.” He appeared to suggest that this was to comply with regulations in EU countries, continuing, “Mission Winnow respects all laws and regulations and continuously strives to find distinctive ways to drive dialogue, free of ideology, and build strong partnerships that are rooted in shared values.” Yet the logo had already featured at three EU races earlier in the season.

And despite Mission Winnow's frequent denials on social media that it is connected to tobacco brands and is instead a campaign for change, he added, “We acknowledge the mistrust and abundance of skepticism towards our industry. However, our intention is not to create controversy around the application of the logo but rather focus on re-framing global conversations, building communities, and supporting innovative ideas that drive positive change.”

The absence also extended to some non-EU races in countries that ban tobacco advertising, promotion and sponsorship, such as the British Grand Prix (U.K.).

BAT, despite placing logos for specific nicotine products on the McLaren cars, did not seem to have such extensive concerns regarding its branding. Although it followed Mission Winnow in removing its own branding from the cars for the French, Austrian and Styrian (also in Austria) races (as well as for the Portuguese race where Mission Winnow was present), the Velo logos were back for the British race at Silverstone. Velo was the predominant brand used during the early part of the season, though Vuse also appeared on the cars in Bahrain and Monaco.

McLaren is clear about the importance of its livery—the frame for BAT's branding—in appealing to fans. Team principal Zak Brown told Autosport earlier this year⁵: “I've always kind of felt like McLaren is Star Wars, but we became a bit Darth Vader, and I think we needed to be a bit more Luke Skywalker. So, cool, Star Wars, but we really tried to turn the attention of the team and the brand into what do people want out of McLaren? Changing the car to papaya, because that's what the fans want.”

Formula Money estimates that together, the two companies spent an estimated \$105 million on F1 sponsorship in 2021 (\$75 million by PMI and \$30 million by BAT).

TOBACCO COMPANY BRANDS AT 2021 GRANDS PRIX

Race	Country regulations*	Ferrari	McLaren
Bahrain	Bans tobacco advertising, promotions and sponsorship. Different regulations apply to different electronic nicotine delivery systems and electronic non-nicotine delivery systems **	Mission Winnow	Vuse
Emilia Romagna (Italy)	Restricts tobacco advertising. Regulates electronic nicotine delivery devices.	Mission Winnow	Velo
Portugal	Bans many forms of tobacco advertising, promotion and sponsorship. Regulates electronic nicotine delivery devices.	Mission Winnow	Autogrill
Spain	Bans tobacco advertising, promotion and sponsorship. Regulates electronic nicotine delivery devices.	Mission Winnow	Velo
Monaco	None	Mission Winnow	Vuse
Azerbaijan	Bans tobacco advertising, promotions and sponsorship. Regulates electronic nicotine delivery devices.	Mission Winnow	Velo
France	Bans many forms of tobacco advertising, promotion and sponsorship. Regulates electronic nicotine delivery devices.	-	Autogrill
Styrian GP (Austria)	Bans many forms of tobacco advertising, promotion and sponsorship. Regulates electronic nicotine delivery devices.	-	Autogrill

Race	Country regulations*	Ferrari	McLaren
Austria	Bans many forms of tobacco advertising, promotion and sponsorship. Regulates electronic nicotine delivery devices.	-	Tomorrowland
British GP (U.K.)	Bans many forms of tobacco advertising, promotion and sponsorship. Regulates electronic nicotine delivery devices.	-	Velo

*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.

PHILIP MORRIS INTERNATIONAL BRANDING 2021 SEASON WITH FERRARI

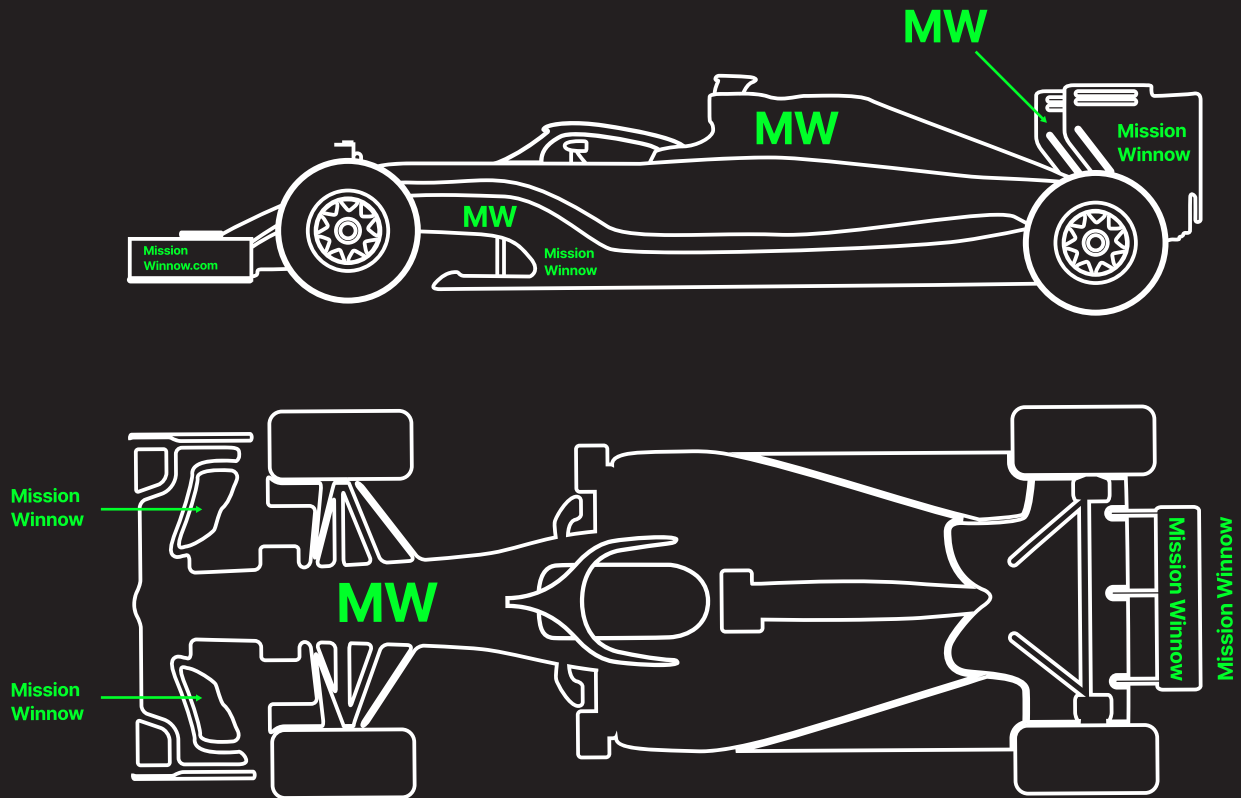
Mission Winnow branding appeared on the Ferrari cars at the first six races of 2021 (Bahrain, Emilia Romagna, Portugal, Spain, Monaco and Azerbaijan), but was absent for the following four races.

Main logo locations of Mission Winnow branding:

Large on rear wing; large on reverse of rear wing; large on airbox; medium on rear wing endplate; medium on inside of rear wing endplate; medium on top of tub; medium on side of tub; medium on bargeboard; medium on front wing endplate; medium on front wing; small on side of cockpit; small on halo; small on wing mirror; driver helmet; chest of driver overalls.

Estimated F1 sponsorship spend 2021⁶	\$75 million
Brand	Mission Winnow
Sponsored team	Ferrari
Owner	Philip Morris International

PMI MISSION WINNOW MAIN LOGO LOCATIONS 2021



BRITISH AMERICAN TOBACCO BRANDING 2021 SEASON WITH MCLAREN

Due to tobacco advertising restrictions, BAT chose not to advertise its own brands on the car at several races during the early part of 2021. Its e-cigarette brand Vuse appeared in Bahrain and Monaco; nicotine pouch brand Velo appeared on the car in Emilia Romagna (Italy), Spain, Azerbaijan and the U.K.; and the slogans “A Better Tomorrow” and “Accelerating Transformation” appeared on the drivers’ overalls at various races.

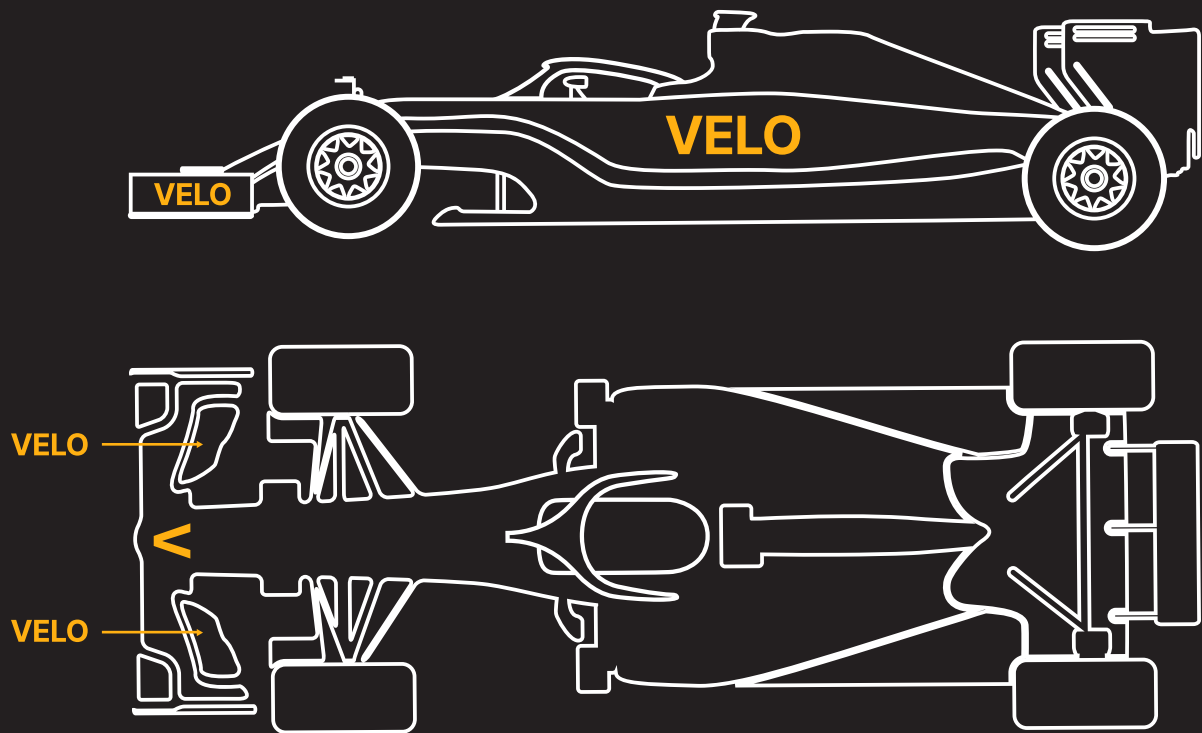
At some races non-BAT brands were featured in the branding slots. The alternate brands included motorway service station operator Autogrill (Portugal, France and Styrian GP [Austria]) and Velo-partnered music festival, Tomorrowland (Austria).

Main logo locations of British American Tobacco branding:

Large on front wing; large on sidepod; medium on front wing endplate; small on top of nose; small on inside of front wing endplate; very small on halo; chest of driver overalls.

Estimated F1 sponsorship spend 2021⁷	\$30 million
Brand	A Better Tomorrow, Vuse, Velo, Accelerating Transformation
Sponsored team	McLaren
Owner	British American Tobacco

BAT MAIN LOGO LOCATIONS 2021



BRANDS PROMOTED BY BRITISH AMERICAN TOBACCO 2021

Brand	Type	Races
A Better Tomorrow	Slogan	Bahrain, Monaco, Azerbaijan
Accelerating Transformation	Slogan	Emilia Romagna (Italy), Spain, British (U.K.)
Autogrill	Retail partner	Portugal, France, Styrian (Austria)
Tomorrowland	Festival	Austria
Velo	BAT nicotine pouch product brand	Emilia Romagna (Italy), Spain, Azerbaijan, British (U.K.)
Vuse	BAT e-cigarette product brand	Bahrain, Monaco

2. TOBACCO SPONSORSHIP IN 2020: BIG MONEY AND BIG EXPOSURE TO YOUNG PEOPLE

When *Driving Addiction: F1 and Tobacco Advertising* was first published in 2020, it was at the halfway point of an F1 season that was impacted by COVID, with some countries agreeing to host two races during the season, while races in other countries were cancelled. We now have a fuller picture of how the teams' sponsorship arrangements with BAT and PMI played out during this unprecedented season.

To the surprise of many, Mission Winnow removed its branding from the Ferrari cars in 2020. Despite being visible on the cars at a major, co-branded event to launch the team's car for 2020, which garnered significant media coverage, the logos had disappeared by the time the team arrived at the first race in Austria. However, PMI remained the lead sponsor, or title partner, of the team,⁸ Mission Winnow branding featured on the Ferrari team's website⁸ and there was also activity on the Mission Winnow social media accounts and website⁹ during 2020.¹⁰

PMI and Ferrari offered little explanation for the absence. If it was caused by legal restrictions, the same restrictions did not seem to affect BAT which displayed its own brands at 14 of the 17 races in 2020.¹¹ Nicotine pouch brand Velo became the dominant brand, appearing at 10 races, with e-cigarette brand Vuse taking another three and Better Tomorrow branding running at the Turkish Grand Prix.¹²

Together PMI and BAT spent an estimated \$105 million on F1 in 2020—the most spent by tobacco companies on F1 since 2006. For the estimated \$30 million BAT spent, its brands received exposure worth around \$54.2 million from race broadcasts alone.¹³

PHILIP MORRIS INTERNATIONAL BRANDING 2020 SEASON WITH FERRARI

Estimated F1 sponsorship spend 2020¹⁴	\$75 million
Brand	Mission Winnow
Sponsored team	Ferrari
Owner	Philip Morris International

PMI chose not to display its Mission Winnow or other branding on the Ferrari cars in 2020. However, as the livery featured no other logos in those spaces throughout the year and was still assigned to PMI, Formula Money did not reduce the value of the sponsorship.

BRITISH AMERICAN TOBACCO BRANDING 2020 SEASON WITH MCLAREN

Estimated F1 sponsorship spend 2020¹⁵	\$30 million
Brand	A Better Tomorrow, Dufry, Velo, Vuse, Accelerating Transformation
Sponsored team	McLaren
Owner	British American Tobacco

Due to tobacco advertising restrictions, BAT chose not to advertise its own brands on the car at some races during 2020. Its nicotine pouch brand Velo appeared at most races; e-cigarette brand Vuse appeared in Bahrain, Sakhir and Abu Dhabi; its “A Better Tomorrow” slogan appeared in Turkey; and its “Accelerating Transformation” slogan appeared on the driver overalls throughout the season. However, retail outlet Dufry was used in Hungary, Belgium and Portugal.

Main logo locations of British American Tobacco branding:

Large on sidepod; large on front wing; medium on airbox; medium on side of tub; medium on top of nose; medium on front wing endplate; medium on inside of front wing endplate; small on wing mirror; very small on halo; chest of driver overalls; driver helmet

BRANDS PROMOTED BY BRITISH AMERICAN TOBACCO 2020¹⁶

Brand	Type	Races
A Better Tomorrow	Slogan	Turkey
Accelerating Transformation	Slogan	Most races
Dufry	Retail partner	Hungary, Belgium, Portugal
Velo	Nicotine pouches	Austria, Styrian (Austria), British (U.K.), 70th Anniversary (U.K.), Spain, Italy, Tuscany (Italy), Russia, Eifel, Emilia Romagna (Italy)
Vuse	E-cigarette brand	Bahrain, Sakhir (Bahrain), Abu Dhabi

BAT BRANDING LOCATIONS 2019 v 2020¹⁷

BAT clearly increased the placement of its logos on the McLaren cars and driver suits in 2020 compared with 2019, to help increase brand exposure.

Location	2019	2020
Sidepod	Large logo at 8 races	Large logo
Airbox	-	Medium logo
Wing mirrors	Small logo	Small logo
Halo	Very small logo at 4 races	Very small logo
Side of tub	Medium logo at 13 races	Medium logo
Top of nose	Small logo	Medium logo
Front wing	-	Large logo
Front wing endplate	Medium logo	Medium logo
Inside front wing endplate	-	Medium logo
Driver helmet	-	Small logo
Driver overalls	Across chest	Across chest

BROADCAST EXPOSURE IN 2020

Overview

One of the most important benefits of any F1 sponsorship is exposure to the sport's 433 million unique global viewers.¹⁸ Formula 1 reported that in spite of holding fewer races during the season, as a result of COVID, broadcast audiences in 2020 were similar to the average for the seven prior years, with an average audience of 87.4 million per Grand Prix in 2020. The organization's announcement notes several markets that it suggests are key for the sport, including China, the Netherlands, the U.K., Russia, Germany and the U.S.A.

So there was still valuable broadcast exposure to be gained in 2020. By using the lap-by-lap performance of each team along with the extent of sponsors' coverage during a given race, Formula Money calculates the advertising value equivalent of team sponsorships, weighted to reflect the effects of race performance on brand visibility. Formula One fans are more likely to pay attention to the action on-screen if it features the leading drivers or a battle for a major position. Formula Money also weights exposure according to the size of each race's global television audience. It covers only exposure gained during the race itself—from the start lights to the checkered flag. This means that the calculated value of the exposure is a conservative figure as it does not include exposure outside the race itself.

More information about this methodology is available in Appendix ii.

The tables below show Formula Money's calculation of the advertising value equivalent for all BAT branding that was featured on the McLaren cars during each race in 2020. As the Mission Winnow brand did not feature on the Ferrari cars during 2020 season, there is no comparable calculation for PMI.

BROADCAST EXPOSURE 2020 BRITISH AMERICAN TOBACCO

In 2020, BAT's branding generated exposure worth significantly more than in 2019, despite there being only 17 races instead of 21, as in 2019. Exposure for all BAT-related branding came to \$61.7 million, with BAT's own product brands generating exposure worth \$54.2 million. This compared to \$27.5 million and \$19.1 million in 2019.¹⁹

A number of factors drove this increase: increased branding for BAT on the McLaren cars, more frequent use of BAT's product brands and the improved performance of McLaren which went from fourth in the championship in 2019, to third in 2020.

Race	Brand	Advertising value equivalent of exposure ²⁰	Finishing position	
Austria	Velo	\$5,401,201	3rd	5th
Styrian (Austria)	Velo	\$4,474,660	5th	9th
Hungary	Dufry	\$1,847,712	9th	13th
British (U.K.)	Velo	\$4,605,277	5th	13th
70th Anniversary (U.K.)	Velo	\$2,709,151	9th	13th
Spain	Velo	\$4,649,580	6th	10th
Belgium	Dufry	\$1,639,807	7th	DNF
Italy	Velo	\$4,250,445	2nd	4th
Tuscany (Italy)	Velo	\$2,494,410	6th	DNF
Russia	Velo	\$779,743	15th	DNF
Eifel (Germany)	Velo	\$4,104,810	5th	DNF
Portugal	Dufry	\$4,042,525	6th	13th
Emilia Romagna (Italy)	Velo	\$3,188,892	7th	8th
Turkey	A Better Tomorrow	\$4,060,668	5th	8th
Bahrain	Vuse	\$4,852,968	4th	5th
Sakhir (Bahrain)	Vuse	\$4,088,231	4th	10th
Abu Dhabi	Vuse	\$4,518,458	5th	6th
TOTAL		\$61,708,539	6th	9th
BAT brands only		\$54,178,495		

EXPOSURE BY BRAND 2020 BRITISH AMERICAN TOBACCO

The best-performing brand in the BAT branding slots was Velo which was featured at 10 of the 17 races in 2020. It gained exposure worth \$36.7 million—59.4% of the total earned exposure.

Brand	Advertising value equivalent of exposure²¹
Velo	\$36,658,169
Vuse	\$13,459,658
<i>Dufry</i>	<i>\$7,530,044</i>
A Better Tomorrow	\$4,060,668
TOTAL	\$61,708,539

Note: Non-BAT brands in italics.

3. PMI AND BAT EXPLOIT F1 MEDIA AND SOCIAL MEDIA

F1'S AUDIENCE IS GETTING YOUNGER

Formula One's growing appeal to a younger audience makes it an attractive proposition for a range of potential sponsors. Since the takeover of the sport by Liberty Media in 2017, interest in the sport from younger fans has increased. Contributing factors include an increased social media presence for the sport and an influx of young, successful and popular new drivers.

Data released by F1 in 2019 showed that almost two-thirds of fans (62%) were aged under 45, an increase of 3% year on year.²² In addition to this, IPSOS found that 61% of new fans of the sport were aged under 35, and 36% were under 25.

Data from Nielsen Sports released earlier this year further emphasized the change.²³ It found that 77% of F1's audience growth in 2020 was in the 16-35 age bracket, with an average of 2.7 million people in that age group becoming fans of F1 each month. It found that 46% of F1's fans overall were aged 16-35.

Factors cited for this shift included the popularity of the Netflix F1 documentary "Drive to Survive," that includes footage and interviews where Mission Winnow and BAT branding are featured, and e-sports initiatives such as the Virtual Grand Prix series that ran in early 2020 when Grands Prix were cancelled due to COVID-19.²⁴ The research from Nielsen also mentioned how younger drivers, including McLaren's Lando Norris and Ferrari's Charles Leclerc, had used game-streaming platform Twitch to connect with their fans.

Tom McCormack, head of rights holders at Nielsen Sports, specifically singled out Norris as a factor in driving younger audiences. "Formula One continues to benefit from its strategy of expanding its content offering—through additional peripheral and story-telling programming—which appeals to that 16 to 35-year-old market," he said. "The current grid of young, social media savvy drivers, like Lando Norris, is helping to reach new consumers through platforms such as Twitch and YouTube."

According to data from Formula 1, social media interactions soared in 2020.²⁵ Followers on major social media networks (Facebook, Twitter, Instagram, YouTube, Tiktok, Snapchat, Twitch and the main Chinese social platforms) increased by 36% to 35 million. Views of F1 video content increased 47% to 4.9 billion while total engagement increased 99% to 810 million.

F1 IN TRADITIONAL MEDIA

F1 also continued to attract attention through more traditional media. Despite the pandemic-enforced reduction in the calendar by four races in 2020, the average TV audience per Grand Prix was still 87.4 million.²⁶ Although this was a 4.5% drop from 2019, it remained higher than the 2018 figure of 87 million. One of the factors in the drop was the loss of races in favorable time zones for TV audiences, such as the United States, Canada, Mexico and Brazil, which capture the large primetime audiences in Europe.

This high level of interest is a big benefit for sponsors, including the tobacco companies, as it means that their logos are broadcast to large audiences around the world and featured by the most prominent news organizations through the normal course of their Formula One coverage. The exposure is far wider than that generated only by F1 broadcasters, the official F1 media channels and the specialist motorsport press.

A non-exhaustive survey by Formula Money of recent media coverage found that Mission Winnow and BAT logos were clearly visible in photos used by major global news outlets including the BBC,²⁷ the Washington Post,²⁸ the Daily Mail,²⁹ Sky Sports News,³⁰ The Guardian,³¹ The Sun,³² the Express,³³ CNN,³⁴ Insider³⁵ and the Independent.³⁶

The photographs were also heavily featured in non-English language media from countries including France (L'Equipe),³⁷ Brazil (UOL,³⁸ Terra³⁹), Spain (Marca),⁴⁰ Italy (Gazzetta dello Sport,⁴¹ Corriere dello Sport⁴²), South Africa (IOL),⁴³ and Charles Leclerc's home country of Monaco (Monaco Tribune).⁴⁴

The coverage extended to popular specialist automotive media such as Top Gear⁴⁵ and more unexpected outlets such as What Hi Fi.⁴⁶

Perhaps of most concern, an article about Lewis Hamilton on the BBC's children's news website Newsround featured a photo of the British world champion on the podium next to former Ferrari driver Sebastian Vettel, with the Mission Winnow logo clearly visible on Vettel's overalls.⁴⁷

What these examples reveal is that when an image is attached to media coverage of F1, BAT and PMI have opportunities to gain exposure for their brands, including in media outlets where tobacco advertising would otherwise be banned.

"DRIVE TO SURVIVE" ON NETFLIX

The popular Netflix show "Drive to Survive," was cited by Nielsen Sports as one of the main factors in increasing F1's appeal to a younger audience. Unsurprisingly, Mission Winnow and BAT branding permeated the show in footage of and interviews with the Ferrari and McLaren teams. The show, which launched in 2018, premiered its third season in March 2021.

During Netflix's one-minute, 57-second trailer for Season 3 of "Drive to Survive," which debuted earlier this year, branding for both Mission Winnow and Velo was clearly visible.⁴⁸ The Ferrari and McLaren stars were some of the most heavily featured drivers in the trailer.



Photo: Netflix, "Drive to Survive" Trailer



Photo: Netflix, "Drive to Survive" Trailer

Netflix releases limited data on its audience numbers, but data from research agency Digital-i indicates that the documentary was streamed in 1 million households in the U.K. alone over the first 28 days of its release in 2019. This equated to 9.1% of households with a Netflix account.⁴⁹

United States Grand Prix promoter Bobby Epstein credited "Drive to Survive" with a 15% increase in ticket sales for the race in 2019⁵⁰ while John Suchenski, director of programming and acquisitions at US F1 broadcaster ESPN, added that, "There is not a way to quantify if the Netflix series has contributed to the audience increases, but it certainly hasn't hurt." ESPN's average audience per race grew from around 547,000 in 2018 to 928,000 in the early part of 2021.⁵¹

FORMULA ONE SOCIAL MEDIA DEMOGRAPHICS

Millions of fans follow F1 on social media, providing teams and sponsors with opportunities for brand exposure and interaction with fans. The data below shows the demographic breakdown of people who mention F1 teams and drivers on social media and other social outlets such as blogs and forums.

The data demonstrates that McLaren in particular—whose cars often carry branding for BAT's nicotine products—appeals to a younger audience than the typical Formula One team, largely driven by the popularity of Lando Norris within this demographic.

Ferrari and McLaren are some of the most popular teams on social media. McLaren has the most Instagram followers of any F1 team, while Ferrari has the third-most followers on Instagram, Facebook and Twitter. McLaren is also the only team with more than one million followers on TikTok.

F1 TEAM INSTAGRAM FOLLOWERS

	Team	Followers
1	McLaren	7.7m
2	Mercedes	7.3m
3	Ferrari	6.8m
4	Red Bull	6.3m
5	Alpine	2.0m
6	AlphaTauri	1.8m
=	Aston Martin	1.8m
8	Williams	1.6m
9	Haas	1.5m
10	Alfa Romeo	1.4m

Note: Analysis by Formula Money. Data correct as of August 2021

F1 TEAM TWITTER FOLLOWERS

	Team	Followers
1	Mercedes	3.3m
2	Red Bull	3.2m
3	Ferrari	3.1m
4	McLaren	2.5m
5	Alpine	1.5m
6	Aston Martin	1.2m
=	Williams	1.2m
8	Alfa Romeo	1.0m
=	AlphaTauri	1.0m
10	Haas	0.7m

Note: Analysis by Formula Money. Data correct as of August 2021

F1 TEAM FACEBOOK LIKES

	Team	Likes
1	Mercedes	11.0m
2	Red Bull	10.0m
3	Ferrari	4.4m
4	McLaren	3.8m
5	Alpine	2.1m
6	Aston Martin	1.1m
=	AlphaTauri	1.1m
8	Williams	0.9m
9	Alfa Romeo	0.6m
10	Haas	0.4m

Note: Analysis by Formula Money. Data correct as of August 2021

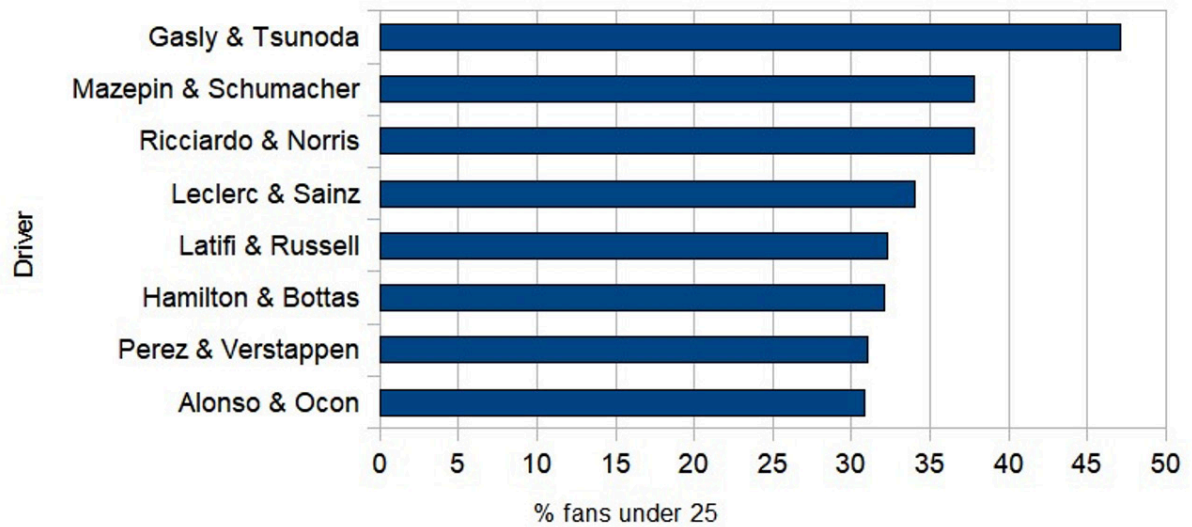
SOCIAL MEDIA DEMOGRAPHIC COMPARISON OF 2021 F1 TEAMS AND SERIES (%)

The data in Table 1 and Chart 1 in Appendix i shows that with 38.1% of its fans aged 18-24, McLaren has younger fans than any other team except AlphaTauri. In total, 88.2% of McLaren's fans are aged 18-34. This gives the team a far younger demographic than F1 itself which has only 32.2% of fans in the 18-24 demographic.

Ferrari performs better than expected in this respect for such a heritage-heavy brand. It has the fifth-youngest fanbase at 35%, perhaps due to its relatively young driver line-up of Charles Leclerc and Carlos Sainz.

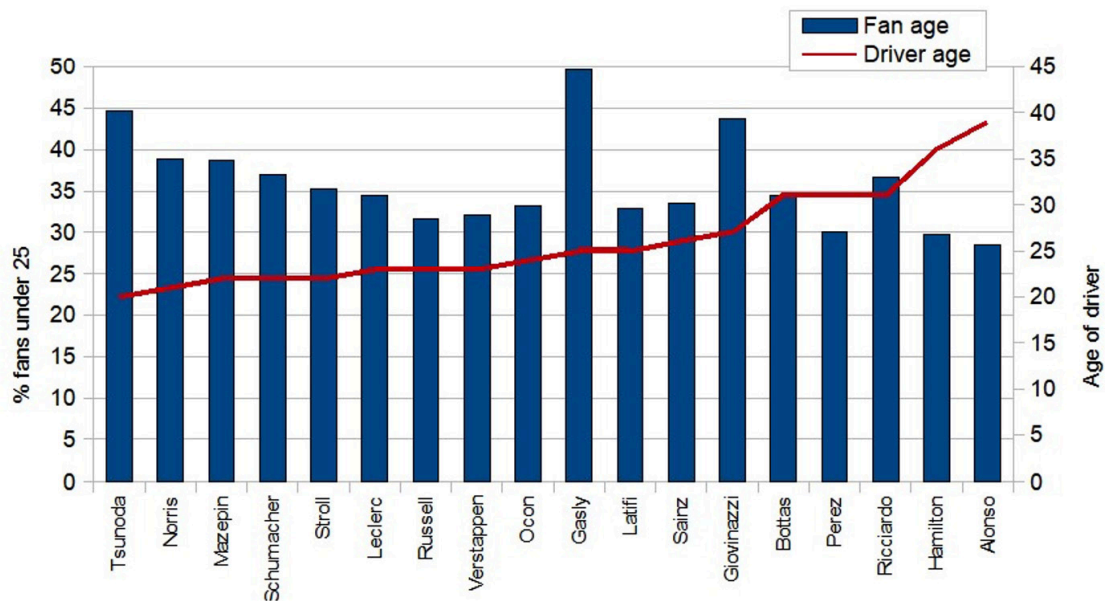
SOCIAL MEDIA DEMOGRAPHIC COMPARISON OF 2021 F1 DRIVERS (%)

The data in Table 2 and Chart 2 in Appendix i indicates that Lando Norris (McLaren) attracts the fourth-highest percentage of young (age 18-24) fans—38.9% of his fans are in this demographic. Of drivers aged over 30, his McLaren teammate Daniel Ricciardo ranks highest in terms of the proportion of fans in the 18-24-year-old age bracket.⁵²



% OF FANS UNDER 25 PER DRIVER PAIRING⁵³

McLaren again performs strongly in terms of the team with the youngest driver pairing with third-best for Ricciardo and Norris.



DRIVER AGE VERSUS YOUNGER FANS COMPARISON

The data below shows that, apart from a few outliers, as the age of a driver increases the percentage of their fans aged 18-24 decreases. This means that popular young drivers such as Lando Norris are particularly attractive to companies looking to promote their brands to a younger demographic. Despite being one of the oldest drivers, Daniel Ricciardo has one of the youngest fan bases of the older drivers. This makes McLaren a particularly enticing prospect for sponsors who are looking to target a younger demographic in F1.⁵⁴

PMI'S MISSION WINNOW ON SOCIAL MEDIA

Although Ferrari does not have the youthful audience of McLaren, it has the advantage of being the oldest and most popular team in the sport. With its relationship with PMI dating back to 1973, the emphasis is very much on heritage and prestige.

Analysis of search data showed that interest in Mission Winnow spiked during Grands Prix weekends, presumably as F1 viewers tried to find out more about the mysterious brand. A review of Google search results showed larger spikes at key moments of 2021 such as the start of the F1 season in late March, Charles Leclerc's home race, the Monaco Grand Prix on May 23, Mission Winnow's decision in June to withdraw its branding from the French Grand Prix, and—biggest of all—the Ferrari car launch in early March and the first sight of the controversial green Mission Winnow logos.

GOOGLE SEARCHES FOR PMI'S MISSION WINNOW 2021

This shows that fans are engaging with the brand and trying to find out more about it even if it is spurred by negative reactions. Although PMI and Marlboro are not named on the car, fans searching for Mission Winnow will quickly find information on the background of the partnership.

This relationship is continued through the @MissionWinnow Twitter account, the brand's main way of communicating with F1 fans online, with an unconventional mixture of quirky F1 content, more serious interviews with other celebrities and bizarre questions aimed at engaging followers. "If change was a tote bag, what would be in it?" @MissionWinnow asked in one tweet.⁵⁵

Many of these tweets give the appearance of having been posted naively with no anticipation

of the negative backlash they might receive from savvy Twitter users. On July 20, 2021, @MissionWinnow asked "Why do we need #MissionWinnow?"⁵⁶ The responses were predictable.

"Those Marlboro cigs aren't going to shift themselves," replied one user. "Because FIA no longer permits tobacco advertising," added another, with someone else joining the conversation to say, "mate you give lots of money + tobacco incognito advertising." Yet another responded to say, "to advertise tobacco, so your company doesnt go irrelavent?" Others mentioned "Because Tabacco" and "Brand washing."

"We have been reading your replies" @MissionWinnow responded. "You can find our answer in our latest article." The tweet linked to a post on the Mission Winnow website, describing the initiative as "a change lab focused on reframing global conversations."

A similar tweet stated: "TRANSPARENCY = TRUST. CHANGE OUR MIND."⁵⁷ On this occasion @MissionWinnow responded directly to several accounts who mentioned tobacco. "You are definitely in the wrong place," was the response to a post that mentioned a love of Marlboro. "There are no brands or products within the #MissionWinnow initiative." Yet some of Mission Winnow's trademark registrations do associate the brand with tobacco products, including cigarettes.



Source: Google Trends

At first glance these conversations may seem to be negative towards Mission Winnow's cause. However, it's notable that one effect of these negative comments is that anyone looking at Mission Winnow's Twitter account can quickly see the link between Mission Winnow and PMI without Mission Winnow itself having to mention it. Although overall engagement with the posts is quite small (as of July 2021, @MissionWinnow had just 8,800 followers), the interactions mean that its relationship to Big Tobacco is quite clear to anyone who looks at the account in detail.

F1-RELATED POSTS ON THE PMI MISSION WINNOW TWITTER ACCOUNT

The table below shows key posts featuring F1 content on the @MissionWinnow Twitter account during the first part of the 2021 F1 season. The most popular posts were the launch of the 2021 Ferrari F1 car, showing bright green Mission Winnow branding, and Mission Winnow's announcement that it would not feature its logo on the cars during races in the European Union.

Post content	Date	Comments	Retweets	Likes
Are you at the Silverstone area this weekend? Do you want to see the Grand Prix from Paddock club? You might be in luck! We are giving away 3 Paddock Club passes to 3 lucky participants! [https://twitter.com/MissionWinnow/status/1414616353319923720]	July 12, 2021	42	6	37
How do you stay connected? Listen to @Charles_Leclerc and tell us about your news routine. @ScuderiaFerrari #MissionWinnow [https://twitter.com/MissionWinnow/status/1413104765559582726]	July 8, 2021	11	54	489
@Charles_Leclerc is very clear about it: Social media is a tool for change. Do you agree with him? @ScuderiaFerrari #MissionWinnow [https://twitter.com/MissionWinnow/status/1408729066606301185]	June 26, 2021	13	92	445
"The Mission Winnow logo will not be featured on the @ScuderiaFerrari livery during races in the EU, starting with the French Grand Prix this weekend." Read our full statement from Vice-President of Partnerships & Engagement Programs, Riccardo Parino [https://twitter.com/MissionWinnow/status/1405797437231534086]	June 18, 2021	57	175	747

Post content	Date	Comments	Retweets	Likes
The best way to get along with someone is to talk to them. Get to know @CarlosSainz55 and his mindset a little better in our newest 'Just Chatting' section! @ScuderiaFerrari #MissionWinnow [https://twitter.com/MissionWinnow/status/1398581478750097408]	May 29, 2021	1	7	20
Do you think you are capable of guessing all of them? #ScuderiaFerrari #MissionWinnow [https://twitter.com/MissionWinnow/status/1393535115884703745]	May 15, 2021	2	38	217
What does it take to bridge division? We identified three steps in @ScuderiaFerrari team members answers 1. Listen 2. Understand 3. Be open-minded #ScuderiaFerrari #MissionWinnow @Charles_Leclerc @Carlossainz55 [https://twitter.com/MissionWinnow/status/1388134634395951104]	April 30, 2021	0	13	112
You asked, we delivered: more behind the scenes with @ScuderiaFerrari, @Carlossainz55 and @Charles_Leclerc from our preseason shooting in Milan! #ScuderiaFerrari #MissionWinnow [https://twitter.com/MissionWinnow/status/1387029861168988169]	April 27, 2021	4	67	638
IN MOTION. A brand-new collab about how we must keep ourselves in action to always go forward. We've already lived the past, but the future is yet to be conquered. @ScuderiaFerrari #MissionWinnow @Carlossainz55 [https://twitter.com/MissionWinnow/status/1385609218439450629]	April 23, 2021	7	31	96
Get ready to move. In motion x @Carlossainz55. Tomorrow! @ScuderiaFerrari #MissionWinnow [https://twitter.com/MissionWinnow/status/1385256673128984579]	April 22, 2021	0	15	106

Post content	Date	Comments	Retweets	Likes
The future is always being created, we can't wait to show you what we've been working on! Any guesses? @ScuderiaFerrari #MissionWinnow @Carlossainz55 [https://twitter.com/MissionWinnow/status/1384874746811228164]	April 21, 2021	1	5	39
We'd take a walk with these two anytime! Here are some of our favorite bits from the conversation between @Carlossainz55 and @Charles_Leclerc. Full version https://youtu.be/i11s4rtPnxA @ScuderiaFerrari #MissionWinnow [https://twitter.com/MissionWinnow/status/1380867546388303875]	April 10, 2021	2	78	598
Wander around with @Carlossainz55 and @Charles_Leclerc as they go for a different kind of walk. Sit back and enjoy! https://youtu.be/i11s4rtPnxA @ScuderiaFerrari #MissionWinnow [https://twitter.com/MissionWinnow/status/1380567100662632462]	April 9, 2021	1	21	143
Take a walk with @Carlossainz55 and @Charles_Leclerc in our upcoming video "Walk the talk". Available tomorrow! @ScuderiaFerrari #MissionWinnow [https://twitter.com/MissionWinnow/status/1380224950016020488]	April 8, 2021	2	78	599
Here's our latest "Would you rather" with @Carlossainz55 and @Charles_Leclerc ! What would you ask the drivers? Send us your suggestions! Down pointing backhand index #MissionWinnow @ScuderiaFerrari [https://twitter.com/MissionWinnow/status/1377333786757619712]	March 31, 2021	4	32	224
Green logo - check what it ACTUALLY means [https://twitter.com/MissionWinnow/status/1376183546050715655]	March 28, 2021	0	1	7

Post content	Date	Comments	Retweets	Likes
Curious why green? All you need to know in one page [https://twitter.com/MissionWinnow/status/1375821157895667717]	March 27, 2021	1	4	11
Do you want to know what's coming? Check this sneak peek out! #MissionWinnow @ScuderiaFerrari @Charles_Leclerc @Carlossainz55 [https://twitter.com/MissionWinnow/status/1375527013658812418]	March 26, 2021	3	64	401
It's time for another round of "Would you rather" with @Charles_Leclerc and @Carlossainz55! #MissionWinnow @ScuderiaFerrari [https://twitter.com/MissionWinnow/status/1374826966508048391]	March 24, 2021	3	39	187
Dilemmas! A round of "Would you rather" with @Carlossainz55 and @Charles_Leclerc @ScuderiaFerrari #MissionWinnow [https://twitter.com/MissionWinnow/status/1372608047063908354]	March 18, 2021	2	30	192
Opinions aside, this change sparked debate and created conversation — and that's what Mission Winnow is meant to do. Whether you agree or disagree, we invite you share your opinions and be part of what we have planned for the future. #MissionWinnow [https://twitter.com/MissionWinnow/status/1372164773270409220]	March 17, 2021	6	3	41
It's evolution. @ScuderiaFerrari #MissionWinnow @Charles_Leclerc @Carlossainz55 [https://twitter.com/MissionWinnow/status/136965686633027590]	March 10, 2021	218	608	2,500
The big moment has arrived. Tune in to watch the SF21 car launch! [https://twitter.com/MissionWinnow/status/1369632882009006082]	March 10, 2021	6	7	46

F1-RELATED POSTS ON THE PMI MISSION WINNOW INSTAGRAM ACCOUNT

Mission Winnow posts less F1-related content on Instagram than Twitter, but its posts often have a higher level of engagement. Like Twitter, the biggest interest was the post about the launch of the 2021 Ferrari car featuring the green Mission Winnow logos.

Post content	Date	Likes	Views
Are you at the Silverstone area this weekend? Do you want to see the Grand Prix from the Paddock Club? You might be in luck! We are giving away 3 Paddock Club passes to 3 lucky participants! To enter, tell us what is your favorite thing about F1 in the comments and tag an adult friend (18+). The Paddock Club pass is valid from Friday 16th July to Sunday 18th July. Must be 18+ Starts now. Competition closes at 5pm BST on Wednesday 14th July. No entry fee. Read our terms and conditions by clicking the link in our bio.#missionwinnow [https://www.instagram.com/p/CRO64MZtI6b/]	July 12, 2021	1,144	
Pick your color! #MissionWinnow [https://www.instagram.com/p/COu8T5nLvIv/]	May 11, 2021		3,572
What does it take to bridge division? We identified three steps in @scuderiaferrari team members answers 1. Listen 2. Understand 3. Be open-minded #ScuderiaFerrari #MissionWinnow @charles_leclerc @carlossainz55 [https://www.instagram.com/p/COSxHYohqVH/]	April 30, 2021		14,428
IN MOTION. A brand-new collab about how we must keep ourselves in action to always go forward. We've already lived the past, but the future is yet to be conquered. @scuderiaferrari #MissionWinnow @carlossainz55 [https://www.instagram.com/p/COA0AvIL0aS/]	April 23, 2021		11,228

Post content	Date	Likes	Views
Get ready to move. In motion x @carlossainz55 . Tomorrow! @scuderiaferrari #MissionWinnow [https://www.instagram.com/p/CN-bLGJh36v/]	April 22, 2021	4,924	
The future is always being created, we can't wait to show you what we've been working on! Any guesses? @scuderiaferrari #MissionWinnow @carlossainz55 [https://www.instagram.com/p/CN7mveOrDKZ/]	April 21, 2021		8,398
We'd take a walk with these two anytime! Here are some of our favorite bits from the conversation between @carlossainz55 and @charles_leclerc . Full version on our IGTV! @scuderiaferrari #MissionWinnow [https://www.instagram.com/p/CNfH6iiB_Xd/]	April 10, 2021		17,760
MW: SF - "Walk the Talk" Wander around with @CarlosSainz55 and @Charles_Leclerc as they go for a different kind of walk. Sit back and enjoy! @scuderiaferrari #MissionWinnow [https://www.instagram.com/p/CNc9ekwBAIH/]	April 9, 2021		11,656
Take a walk with @carlossainz55 and @charles_leclerc in our upcoming video "Walk the talk". Available tomorrow! @scuderiaferrari #MissionWinnow [https://www.instagram.com/p/CNajgeuMVPD/]	April 8, 2021		29,417
Do you want to know what's coming? Check this sneak peek out! #MissionWinnow @scuderiaferrari @charles_leclerc @carlossainz55 [https://www.instagram.com/p/CM5LIJ3FZNq/]	March 26, 2021		4,974
Opinions aside, this change sparked debate and created conversation — and that's what Mission Winnow is meant to do. Whether you agree or disagree, we invite you to share your opinions and be part of what we have planned for the future. #MissionWinnow [https://www.instagram.com/p/CMhSKirBTfy/]	March 17, 2021		22,586
It's evolution. #ScuderiaFerrari #MissionWinnow [https://www.instagram.com/p/CMPfioFgoGo/]	March 10, 2021		51,335

4. PMI AND BAT SOCIAL MEDIA CAMPAIGNS TO ENGAGE F1 FANS

The section below highlights some major Formula One social media campaigns featuring PMI's Mission Winnow and BAT and the response that they received. These campaigns were selected to show the range and variety of social media posts about the brands and the different strategies being used to generate exposure.

1. PMI's GREEN MISSION WINNOW BRANDING

When: March 2021

Description: When the new Ferrari F1 car launched in March 2021, many fans were surprised—and in some cases horrified—to see that the large Mission Winnow logo on its engine cover was a bright fluorescent green that clashed with the team's traditional scarlet paint scheme.

Effects: The clashing green logo generated a lot of interest on social media and was Mission Winnow's most interacted-with post on both Twitter (2,500 likes)⁵⁸ and Instagram (51,335 views).⁵⁹ Slogans such as "Green Is Possibility" and "Pick your color!" encouraged responses. Ferrari's own post revealing the livery received 17,800 likes and 2,893 retweets on Twitter.⁶⁰

Some fans described the branding as "ugly," "trash," "cringe," "gross," "horrendous" and like "nuclear waste." Although the reaction wasn't universally negative, it got people talking and many of them were quick to mention Mission Winnow's connection to PMI.

Google searches for Mission Winnow hit their highest level of 2021 by far around the time of the launch, illustrating that the logo had people wondering what was behind Mission Winnow.

2. PMI MISSION WINNOW WALLPAPERS

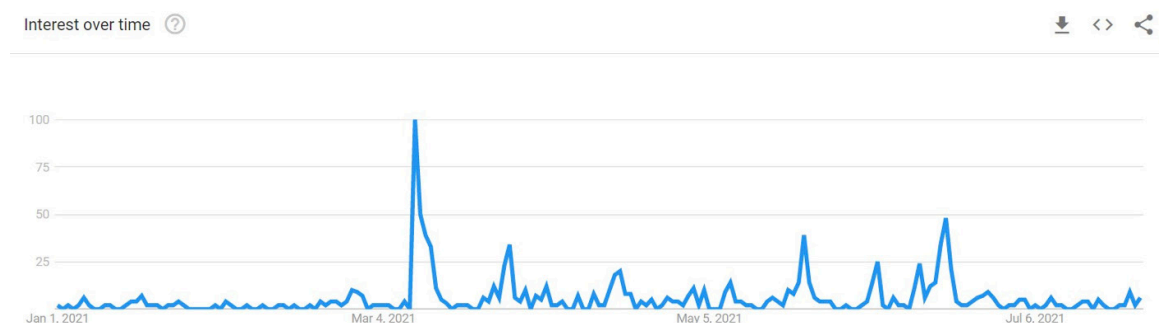
When: March 2021

Description: The @ScuderiaFerrari Twitter account offered fans four wallpapers of their drivers "presented by #MissionWinnow." Each of the four wallpapers displayed five Mission Winnow logos.

Effect: The reaction to the wallpapers was overwhelmingly positive with many of the fans enthusiastically thanking Ferrari for the gift.

Photos showed an audience that was largely young adults. One fan listed "17" in their biography, another "18". Another posted photos of her recent Ferrari-themed 21st birthday party.

Ferrari did not explicitly state in its tweet that it was a promotion for Mission Winnow.



Source: Google Trends

3. BAT VUSE LAUNCH ABU DHABI

When: December 2019

Description: BAT brand Vuse used the 2019 Abu Dhabi Grand Prix to launch its product in the Middle East with a glamorous party visited by local influencers.⁶¹

Effect: The event was famously featured by the Bureau of Investigative Journalism which drew attention to how BAT was using influencers to promote its products on social media, especially in emerging markets.⁶²

One post from Kenyan Instagrammer @justjoykendi showed the influencer in the Abu Dhabi pitlane and used three hashtags mentioning BAT's Lyft brand. Lyft is the brand name for BAT's nicotine pouches in some markets, though BAT has announced that it will consolidate the branding for this product range under the Velo brand. Sister influencers @soniafyza, proudly boasted, "We had such a great time at F1 races in Abu Dhabi with @vusevape.me x @mclaren! It was truly the greatest launch party of the year #vusechargebeyond #formula1."⁶³

The launch party itself featured a McLaren showcar on display and prominent Vuse branding.

One local journalist was shocked by the event. "I watched a 'blogger' (whatever they call themselves now) fly all the way to Abu Dhabi to attend the F1 events.. all good? Ok. My problem is she was invited by a brand called 'Vuse Vape' an actual vape brand in the middle east."⁶⁴

4. GAMING EXPOSURE

When: January 2021

Description: BAT launched an e-sports series—the Velo Eseries—with McLaren, pitting celebrities against influencers.⁶⁵

Effect: BAT's New Categories Director, Paul Lageweg, was quick to stress that the e-sports

expansion was not an attempt to attract a younger audience. "VELO is all about creating exciting experiences for our adult nicotine consumers," he said.

Yet it is well known that e-sports appeal to a younger audience. According to Nielsen, 38% of e-sports fans are under the age of 24,⁶⁶ while a 2019 survey found that 32 percent of internet users worldwide aged between 16 and 24 stated that they watched e-sports.⁶⁷ According to data from Activate, 62% of e-sports fans in the U.S. are aged 18-34.⁶⁸

Responses to McLaren's tweet announcing the launch of the Eseries suggested that some fans were skeptical: out of 44 responses, 13 were either negative towards the sponsorship or explicitly point out that Velo is a tobacco brand; others were negative for other reasons and only one was supportive.⁶⁹ "I really wish McLaren would drop the BAT partnership. It's really toxic for the brand and doesn't complement the #McLarenFamily at all," said one. "Why are they advertising Smoking aimed at something for kids," added another. A third commented: "Seriously. Nicotine products? It's 2021 not 1970. So tone deaf."

Viewers of the Velo Eseries on YouTube had to register to prove their age before watching the tournament. However, the Bureau of Investigative Journalism reported that several viewers admitted to being underage during one of the episodes.⁷⁰

McLaren has strong links with gaming due to Lando Norris' popularity on the streaming platform Twitch and his enthusiastic involvement in e-racing tournaments. This has endeared him to a younger demographic. According to Mediakix 73% of Twitch users are under the age of 35 and "there's a massive opportunity for advertisers looking to communicate with such a young audience."⁷¹ Although F1 content only makes up a small proportion of the content on Norris' Twitch channel, fans from that platform are likely to explore his life outside Twitch too.

Tobacco companies do not often have a chance to promote their partnerships through F1 gaming. The official Formula 1 Game by Codemasters removes tobacco-related brands from the cars. However, this does not please some gaming fans who want to see the authentic liveries reflected in the game. For example, one fan responded to a tweet promoting the game to ask, “Will you be adding the sponsors like a better tomorrow or velo or mission winnow Please do cause the mclaren and Ferrari just look bare without it.”

5. COMPETITION PRIZES

When: 2021 F1 season

Description: Both BAT and PMI have used F1-related competitions to promote their brands and encourage fan interaction.

Effect: As part of its “You’ve Got Velo” campaign, BAT has run competitions where the prize is a miniature Velo-branded McLaren helmet and a selection of McLaren-orange themed tins of Velo. The prizes are sent to recipients in a glossy presentation box marked “Velo Limited Edition” with a handwritten number.

Posts on social media from winners are overwhelmingly positive. One winner posted photos of his prize on the Reddit Snus forum.⁷² The responses described the prize as “swag,” “awesome,” “insanely cool” and “Nice!”

Another winner of a limited-edition helmet posted about it on Twitter and the prize was again described as “awesome.”

A third winner praised the “amazing prize pack” on Instagram: “Absolutely love it, thank you so much!”

More recently Mission Winnow has followed BAT’s lead and promoted its F1 involvement through competitions. It recently offered three tickets to the official Paddock Club hospitality at the British Grand Prix on Twitter⁷³ and Instagram.⁷⁴

6. CONVERSATIONS WITH DRIVERS

When: 2021 F1 season

Description: Mission Winnow’s popular series asks the Ferrari drivers quirky questions to draw attention to the brand.

Effect: Throughout the 2021 season, Mission Winnow has used its Twitter channel to broadcast a series of short interviews with Ferrari’s young driver pairing. Some of the questions are bland; one recent post asked Charles Leclerc how he stayed connected,⁷⁵ while others are quirky: “would you rather be Spider-Man or Batman”.⁷⁶ Regardless, they can generate thousands of views.

One of the series included a 20-minute YouTube video featuring Sainz and Leclerc walking in front of a CGI background with the Mission Winnow logo clearly visible on their shirts. With more than 40,000 views it was by far the most popular video posted on the Mission Winnow YouTube channel.

Formula Money’s analysis of comments on the posts indicates that the people who are most likely to engage with them appear to be young people based upon their photos or the content of their posts or the age they provide in their biographies—who are keen to find out more about the personalities of the drivers. Although the Mission Winnow social media channels do not have the same level of following as the teams or drivers, their audience is overwhelmingly young. Data from Talkwalker social media monitoring system, analysed by Formula Money, shows that almost everyone who engages with @MissionWinnow is aged 34 or under.

7. FESTIVALS

When: 2020 and 2021

Description: Velo used its sponsorship of McLaren to promote its brand to a young festival-going audience through partnerships with the Tomorrowland and Sonic Circuit events.

Effect: Formula One is not often associated with dance music, so it came as a surprise to some to see the logos of the famous Belgian festival, Tomorrowland, on the McLaren cars at the 2021 Austrian Grand Prix.

Austria was one of the countries where BAT chose not to display its own branding in 2021, substituting it with Autogrill at the Styrian Grand Prix and Tomorrowland at the Austrian Grand Prix. BAT, an official corporate partner of Tomorrowland,⁷⁷ released a statement to say that it was “donating” its space on the McLaren cars at the Austrian Grand Prix to the festival.⁷⁸

John Beasley, Group Head of Brand Building at BAT, said: “McLaren is more than a partner in motorsport, we share a love of music and innovation, and this provides a never-before-seen opportunity to make a statement—for our music-loving fans of motor racing and providing much-needed support for the live music industry.” The announcement was covered in the music press which celebrated the “badass McLaren racecar.”⁷⁹ It was the first time that a brand of this kind replaced BAT’s normal branding on the McLaren car.

According to data from Talkwalker, 39.2% of people who engage with @Tomorrowland on social media are aged 18-24. A further 42.5% are in the 25-34 age group.

It was not the BAT-McLaren partnership’s only foray into music. Just a few weeks later Velo was promoting another music event to coincide with the British Grand Prix. The performance was broadcast on Velo’s YouTube channel led by DJ Wilkinson.⁸⁰ The description declared: “We’re ready to rock the rooftops as VELO Presents Sonic Circuit, the official afterparty of McLaren Racing HomeFest.”

It was a continuation of the #McLarenHomeFest fan campaign of 2020 which encouraged fans at home to celebrate during the race.⁸¹ Part of this “virtual fan festival” included a “post-race afterparty from VELO.” A McLaren statement said, “The event will bring together music and racing fans, with a host of additional exclusive content on the Maze by VELO platform.”⁸² Maze is a Velo sub-website heavily focused on music and young people.

8. PROMOTION PARTNERS

When: Various

Description: Brands that have worked on McLaren and BAT initiatives as partners promote the sponsorship through their own social media outlets, exposing the partnership to a wider audience.

Effect: Companies are usually keen to promote their involvement with initiatives involving racing teams. Sometimes this does not come from expected sectors and exposes the partnership to a new audience.

In February 2021, CreativeLaw&Business, an entertainment law firm, promoted the role it had played in providing services from the Velo Eseries.⁸³

In July 2021, IET Venues boasted how its Johnson Roof Terrace had been used by Velo and McLaren to host the DJ Set for the Sonic Circuit initiative.⁸⁴

Sometimes the partnership is promoted from more obvious sources. In one example, a British online vape store used photos of a Lyft-branded McLaren to drive followers to its store. Lyft is the brand name for BAT’s nicotine pouches in some markets; BAT has announced that it will consolidate the branding for this product range under the Velo brand.⁸⁵

5. THE BIGGEST-SPENDING TOBACCO COMPANIES IN F1 HISTORY

PMI and BAT's current sponsorship of F1 is part of a long history of tobacco industry involvement in the sport. PMI has increased its lead as the biggest-spending tobacco company in F1.

According to Formula Money's calculations, it has now spent an estimated \$2.3 billion on the sport, more than half the total \$4.5 billion spent to date by all tobacco companies.

BAT, currently in third place with \$425.9 million in total sponsorship spending, looks set to become the second biggest spender of all time if it completes another two seasons with McLaren.

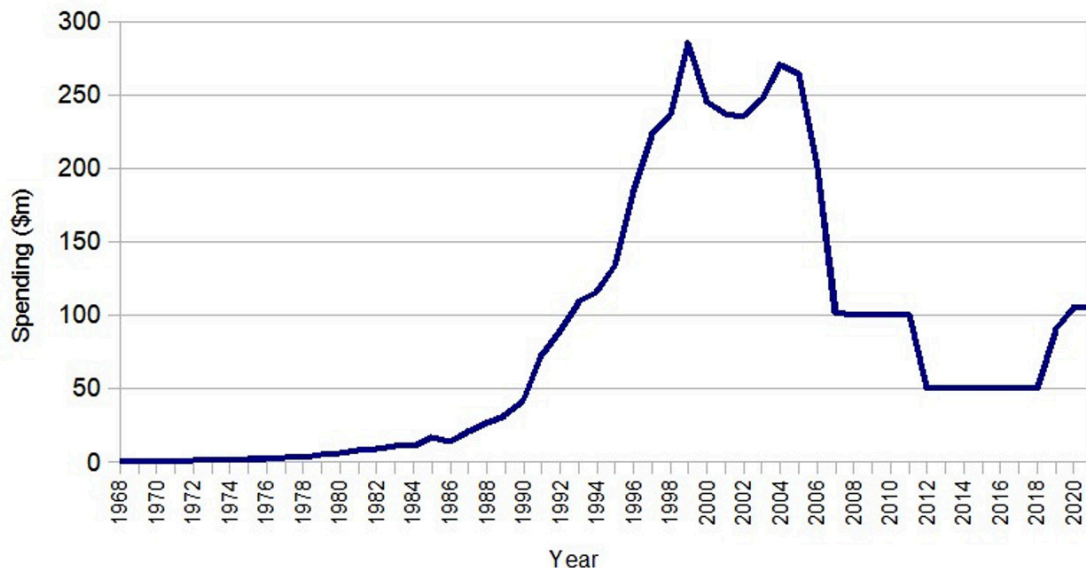
Company	Main sponsors	Est. value ⁸⁶
Philip Morris/Altria	Marlboro, Mission Winnow	\$2,341.7m
Japan Tobacco	Mild Seven	\$481.2m
British American Tobacco	Lucky Strike, 555, Velo, Vuse	\$425.9m
Rothmans	Rothmans, Winfield	\$260.7m
Reemtsma	West	\$234.5m
Gallaher	Benson & Hedges, Sobranie	\$223m
RJ Reynolds	Camel, Barclay	\$187.5m
Seita	Gitanes, Gauloises	\$186m
Imperial	JPS, West, Gold Leaf, Embassy	\$177.3m
Villiger	Tabatip	\$0.1m
TOTAL		\$4,517.9m

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

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, 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.

TOBACCO COMPANY SPENDING ON F1 BY YEAR



Peak: \$285 million, 1999

Average: \$83.7 million per year

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

6. CONCLUSION AND RECOMMENDATIONS

This report reveals that PMI and BAT's involvement in F1 is enabling tobacco companies to reach and engage with young sports fans around the globe. In recent years F1 has worked to increase its appeal to an increasingly young audience. Most new fans of the sport are young adults, and possibly younger, attracted by increased activity on social media, e-sports, charismatic young drivers and projects such as the Netflix series, "Drive to Survive."

McLaren, whose cars provide a platform for advertising products from one of the world's biggest transnational tobacco companies, now has one of the youngest audiences of any team on social media. It has the most followers of any F1 team on Instagram and is the only team with a significant following on TikTok, a youth-oriented platform where many teams don't even have a presence.

Despite its greater focus on heritage and prestige, with a social media presence not quite as dynamic as McLaren's, Ferrari is still F1's most popular team, with high numbers of followers across the main social media platforms (Twitter, Facebook and Instagram).⁸⁷

Continuing to allow tobacco sponsorship in F1 means that Liberty Media, the FIA, Ferrari and McLaren are complicit in helping an industry whose products kill more than 8 million people every year reach young audiences with their branding and messaging. The health consequences of using the products being promoted—directly and indirectly—are not yet known. While working to increase its young fanbase, the sport may be putting the future health and well-being of those young people at risk. Further investigation of the nature and reach of tobacco companies' exposure via F1, especially among younger fans, is warranted.

Tobacco company sponsorship in F1 is a violation of the World Health Organization Framework Convention on Tobacco Control (WHO FCTC) and, due to F1's cross-border reach, of national bans on tobacco advertising, promotions and sponsorship.⁸⁸ STOP urges all governments to implement and enforce comprehensive bans

on all tobacco industry advertising, promotions and sponsorships, in line with the WHO's recommendations.

Tobacco company sponsorship also conflicts with the sport's purported support for the United Nations Sustainable Development Goals (UN SDGs). Strengthening the implementation of the WHO FCTC, which includes banning tobacco advertising, sponsorship and promotions, is a target in the SDGs (Target 3.a) and is recognized as one of the "means of implementation" to reach the overall health goal (SDG 3) and a target on non-communicable diseases (Target 3.4).⁸⁹ Until it acts to end all tobacco and related advertising and sponsorship in the sport, international organizations should not endorse F1.

STOP calls on Liberty Media, the FIA and the teams to behave responsibly towards the sport's young fans and to not undermine governments' efforts to reach national health goals as part of their commitment to the UN SDGs. Finally banning all tobacco and nicotine company sponsorship in F1 would be a start.

APPENDICES

i. DEMOGRAPHICS OF F1 FANS ACTIVELY ENGAGING ON SOCIAL MEDIA⁹⁰

The following tables and charts show the age and gender of people who discuss Formula One and its teams on social media. Searches are based on the teams' Twitter handles. As analysis indicates this highlights posts with a higher level of engagement, rather than posts that simply mention the team in passing. Social media users under 18 are not tracked by the data.

TABLE 1: SOCIAL MEDIA DEMOGRAPHIC COMPARISON OF 2021 F1 TEAMS AND SERIES (%)

Team	Gender (%)		Age (%)					
	Female	Male	18-24	25-34	35-44	45-54	55-64	65+
@F1	23.4	76.6	32.2	51.4	13	2.9	0.5	0
@McLarenF1	39.1	60.9	38.1	50.1	10.3	1.2	0.3	0
@ScuderiaFerrari	29.6	70.4	35	52.2	11.4	1.2	0.3	0
@AlpineF1Team	26.2	73.8	31.9	57.4	8.5	1.7	0.6	0
@AlphaTauriF1	41.1	58.9	49.4	41.8	7.4	1.4	0	0
@alfaromeoracing	28.3	71.7	28.9	46.2	22.3	1.3	1.3	0
@AstonMartinF1	32.7	67.3	36.4	49.9	11.6	1.8	0.4	0
@MercedesAMGF1	28	72	32.1	52.2	12.1	3	0.6	0
@HaasF1Team	27.3	72.7	37.2	50.7	10.1	2	0	0
@redbullracing	23.1	76.9	31.8	51.4	12.5	3.5	0.7	0
@WilliamsRacing	32.8	67.2	34.4	52.1	9.7	3.4	0.4	0

WHICH TEAMS HAVE THE MOST FANS UNDER 25?

The data below shows the demographic breakdown of Formula One's 2021 drivers and their fanbase on social media.

Chart 1

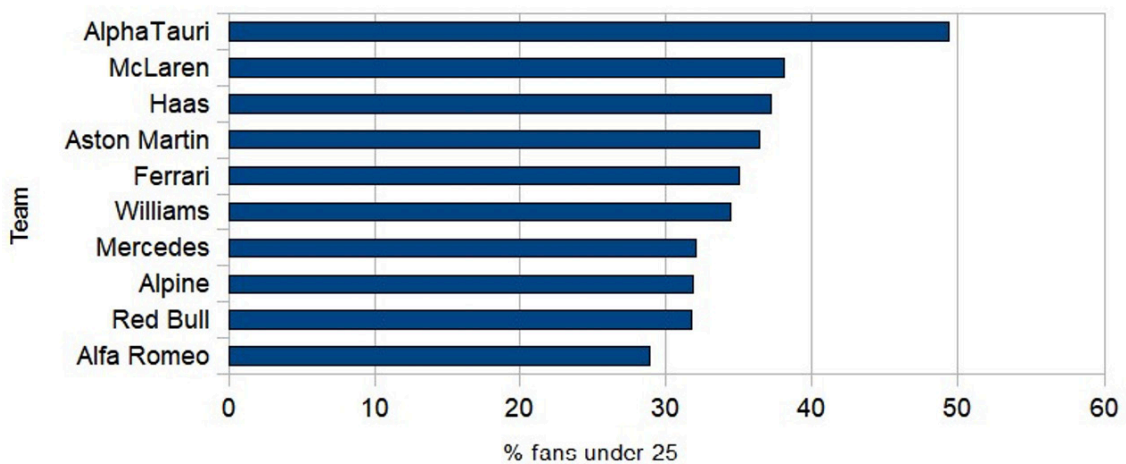


TABLE 2: SOCIAL MEDIA DEMOGRAPHIC COMPARISON OF 2021 F1 DRIVERS (%)

Driver	Team	Age	Gender		Age						
			Female	Male	18-24	25-34	35-44	45-54	55-64	65+	
Kimi Raikkonen	Alfa Romeo	41	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
@Anto_Giovinazzi	Alfa Romeo	27	40.7	59.3	43.7	48.5	7.9	0	0	0	
@PierreGASLY	AlphaTauri	25	44.3	55.7	49.7	42.2	7.6	0.6	0	0	
@yukitsunoda07	AlphaTauri	20	40.9	59.1	44.6	47	6.3	2.1	0	0	
@alo_oficial	Alpine	39	17.4	82.6	28.5	55.5	13.9	1.3	0.8	0	
@OconEsteban	Alpine	24	21.5	78.5	33.2	56.5	10.2	0	0	0	
Sebastian Vettel	Aston Martin	33	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	
@lance_stroll	Aston Martin	22	27	73	35.3	45.6	16.1	3	0	0	

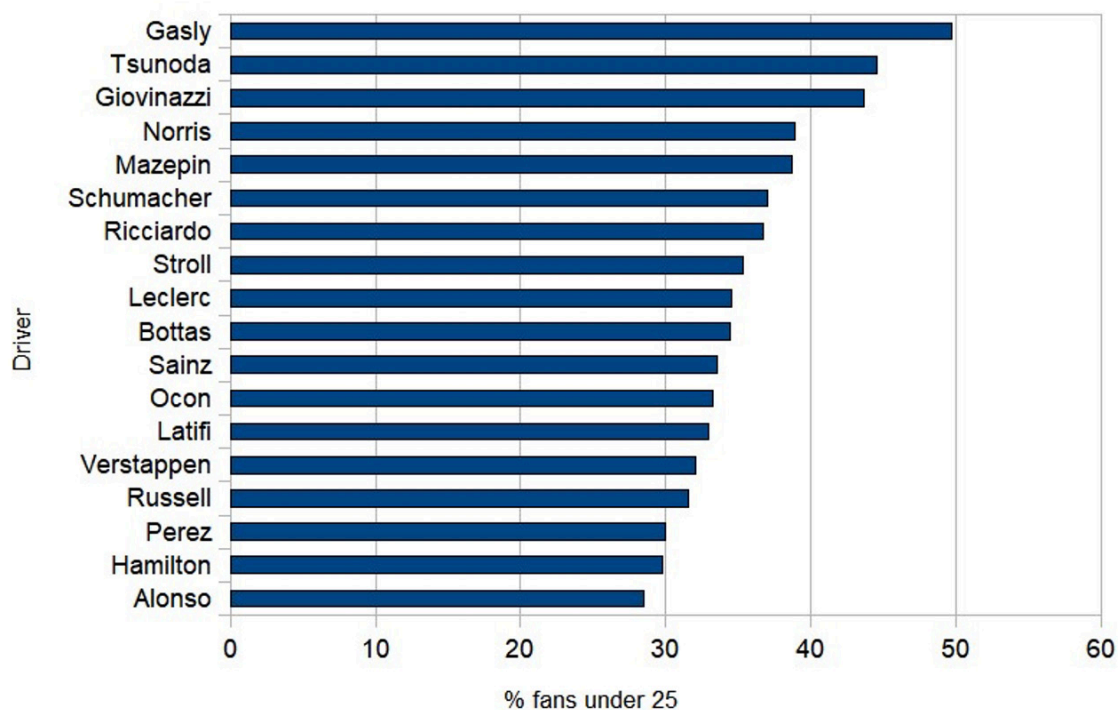
Driver	Team	Age	Gender	Age						
@Charles_Leclerc	Ferrari	23	31.3	68.7	34.5	52.9	10.5	1.7	0.3	0
@Carlossainz55	Ferrari	26	31.4	68.6	33.5	55.1	10.2	0.7	0.5	0
@nikita_mazepin	Haas	22	20.2	79.8	38.7	48.4	9.7	3.2	0	0
@SchumacherMick	Haas	22	29.3	70.7	37	50.2	9.6	2.6	0.6	0.1
@danielricciardo	McLaren	31	41.6	58.4	36.7	50.9	10.2	1.6	0.6	0
@LandoNorris	McLaren	21	42.3	57.7	38.9	50.5	8.7	1.5	0.4	0
@LewisHamilton	Mercedes	36	23.3	76.7	29.8	51	14.2	4.2	0.7	0
@ValtteriBottas	Mercedes	31	26.4	73.6	34.4	49.4	12.5	3.7	0	0
@SChecoPerez	Red Bull	31	22	78	30	52.1	14.2	3.2	0.5	0
@Max33Verstappen	Red Bull	23	20.8	79.2	32.1	49.8	13.9	3.5	0.7	0
@NicholasLatifi	Williams	25	33.2	66.8	32.9	52	12.3	2.7	0	0
@GeorgeRussell63	Williams	23	36.3	63.7	31.6	56	9.5	2.6	0.3	0

Notes:

- Search term based on driver's Twitter handle. Sebastian Vettel and Kimi Raikkonen do not have Twitter accounts so have been excluded.
- Age refers to the driver's age at the start of the 2021 season.

WHICH DRIVERS HAVE THE MOST FANS UNDER 25?

CHART 2



ii. METHODOLOGY USED IN THIS REPORT

- 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 given in United States dollars (USD) unless otherwise specified.

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. Our 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 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 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.

BROADCAST EXPOSURE VALUE

One of the most important benefits of a Formula 1 sponsorship is exposure to the sport's 433 million unique global viewers. The broadcast exposure data in this report is calculated according to Formula Money's own methods, which differ from other methods as they are focused on performance. By using the lap-by-lap performance of each team along with the extent of sponsors' coverage during a given race, Formula Money calculates the advertising value equivalent of team sponsorships, weighted to reflect the effects of race performance on brand visibility.

Formula One fans are more likely to pay attention to the action on-screen if it features the leading drivers or a battle for a major position. The focus of Formula Money's exposure data therefore differs from other valuations. It is not focused on time on-screen but instead focuses on how the global media value of each sponsor's exposure is affected by performance. The value of exposure is weighted to reflect each team's on-track performance on a lap-by-lap basis.

There are three types of performance weighting covering teams that run in the top three during the race, in the top 10 and which finish in a points scoring position. Most of the weighting is based on average lap position rather than finishing position in order to better reflect the focus of fans' attention during the race. A driver who runs in first place for the first two-thirds of a race is therefore boosted by the weighting even if he does not finish.

Formula Money also weights exposure according to the size of each race's global television audience. This means that the most-watched races on the calendar are awarded a higher per-second exposure value to account for their higher audience. The Japanese Grand Prix, which is in an unfavorable time zone for many of F1's main markets in Europe and North America, receives the lowest rating. TV weighting for new races is based on races taking place within a similar time zone and at a similar stage of the season.

The data covers all brands featured on F1 cars during the relevant period, including sponsors, team owners and engine manufacturers. The data also includes the exposure achieved by trackside advertisers at each race.

As Formula Money's data is performance-based, exposure is calculated for the duration of the race only—from the start lights to the checkered flag – and excludes branding of on-screen graphics. Exposure gained from pre-race events, the podium, practice sessions and qualifying is not included in the totals unless otherwise specified. This means that the calculated value of the exposure is a conservative figure as it does not include exposure outside the race itself.

Endnotes

1. This figure differs from the estimate in 2020's Driving Addiction: F1 and Tobacco Advertising report, which was a pre-season calculation based on assumptions around sponsorship activity. The revised calculation is based upon observation of actual activity in the 2020 season. Ref: <https://exposetobacco.org/wp-content/uploads/Tobacco-Sponsorship-in-Formula-One.pdf>
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10. Source: Analysis conducted by Formula Money of activity on missionwinnow.com and Mission Winnow social media accounts.
11. Source: Formula Money Sponsorship Database, summarised in BROADCAST EXPOSURE 2020, BRITISH AMERICAN TOBACCO, below.
12. Source: Formula Money Sponsorship Database, summarised in BROADCAST EXPOSURE 2020, BRITISH AMERICAN TOBACCO, below.
13. Source: Formula Money estimates, July 2021. These differ from the estimates for 2020 in the first Driving Addiction report that was calculated pre-season, before the sponsor strategies in 2020 were evident.
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15. Source: Formula Money estimates, July 2021
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