



FORMULA ONE ARCADE

Marketing Strategy Analysis & Redesign





F1 ARCADE — CURRENT MARKETING STRATEGY





BRAND BACKGROUND & COMPANY SNAPSHOT

What is F1 Arcade?

F1 Arcade is the world's first official Formula 1-licensed experiential hospitality brand. Founded by Adam Breeden — co-founder of Puttshack — it operates full-motion racing simulator venues combined with premium food, cocktails, and sports bar atmosphere. Backed by Formula 1 and Liberty Media, it holds an exclusive long-term license to bring the F1 brand into physical entertainment venues globally.



BRAND BACKGROUND & COMPANY SNAPSHOT

Founded — 2022 — flagship launch at St. Paul's Cathedral, London (16,000 sq ft)

US Launch — April 2024 — Boston Seaport (first US location)

Current US Locations (2025) — Boston, Washington D.C., Philadelphia, Denver, Las Vegas, Atlanta — 6 locations

International — London, Birmingham (UK); Madrid (Spain) — franchise model outside US and UK

Total Funding — \$130M growth financing closed July 10, 2024 (Cheyne Capital, Liberty Media, Permira Credit, OakNorth)

CEO — Jonathan Peters (stepped up from Global President, 2025)

Founder — Adam Breeden — also co-founded Puttshack with Topgolf creators

Expansion Target — 30+ locations globally by end of 2027; 5 new US locations per year

US Model — Company-owned and operated; franchise model reserved for international markets

F1 Box Format — Smaller footprint format launched London 2025 — targeting hotels, casinos, airports, cruise ships, malls



BRAND BACKGROUND & COMPANY SNAPSHOT

\$130M

Total Growth Funding
(2024)

Cheyne Capital / Liberty Media

6

US Locations (2025)

FSR Magazine

30+

Global Locations by
2027

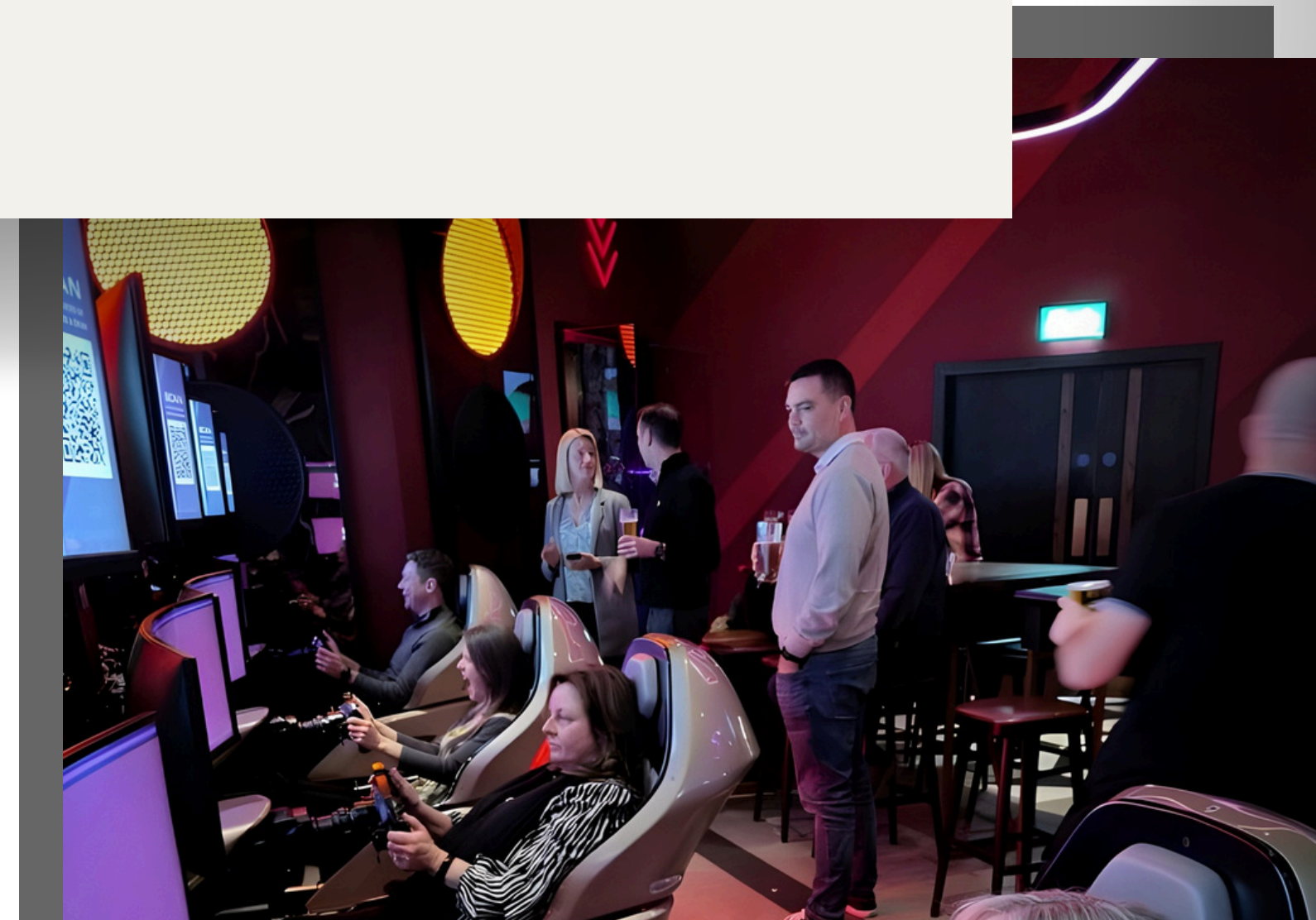
F1 Arcade Press Release

"We don't consider ourselves a racing simulator venue — we are a hospitality business first." — Jonathan Peters, F1 Arcade CEO (FSR Magazine, December 2025)

"Only 1% of F1 viewers will ever attend a race in-person. F1 Arcade bridges that gap." — Jon Gardner, US President, F1 Arcade (Motorsport.com, October 2024)



MARKET CONTEXT





The F1 Cultural Moment

837M

Global F1 Fanbase (2025)
Cheyne Capital / Liberty Media

52M

US F1 Fans (2025)
FSR Magazine

43%

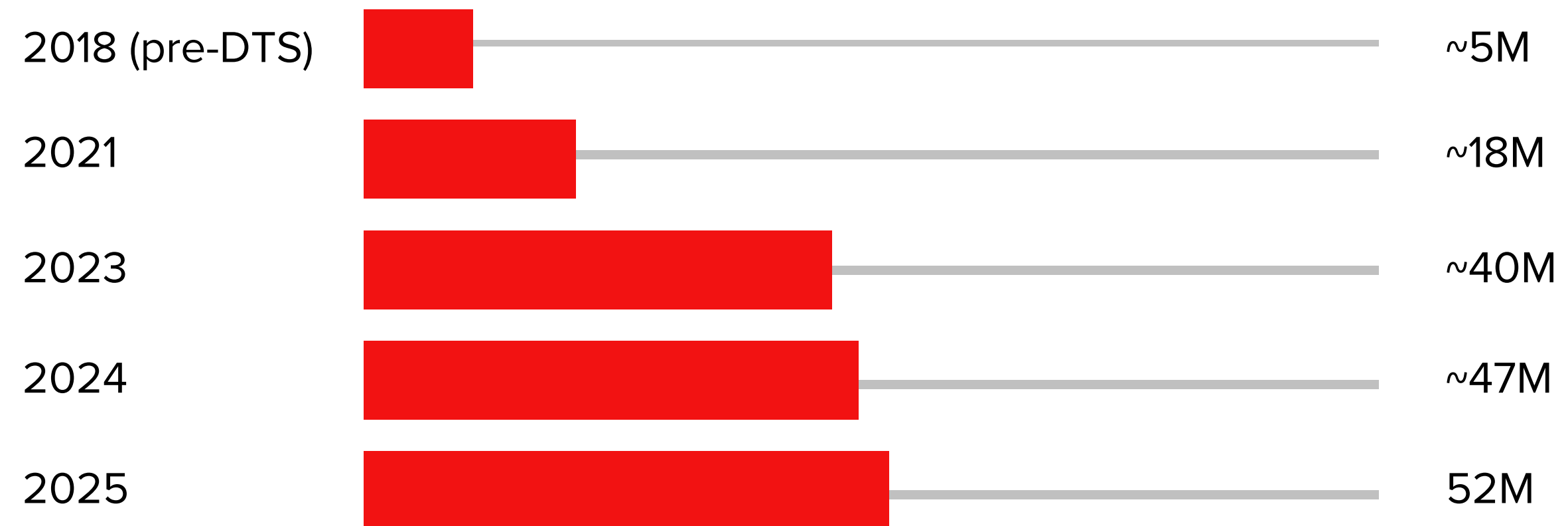
F1 Fans Under Age 35
Marketing Week, March 2026

Formula 1's US audience grew from approximately 4 to 5 million fans in 2018 to 52 million in 2025 — a tenfold increase driven by the Netflix Drive to Survive series (launched 2019), three US Grand Prix events, and F1 The Movie (2025, \$630M+ box office, highest-grossing sports film ever). The global fanbase reached 837 million in 2025, up 12% year-on-year and 63% versus 2018.



The F1 Cultural Moment

F1 US Fanbase Growth (Millions)



Source: Liberty Media investor presentations, Nielsen Sports, Marketing Week (March 2026). DTS = Drive to Survive Netflix series.



The Entertainment / Competitive Social Entertainment Sector

386%

Growth in Competitive
Social Concepts Since 2021

Cushman & Wakefield

\$116.8B

Immersive Entertainment
Market by 2025

Global Market Insights

3+

Annual Visits Needed for
Viable Unit Economics

EMERGING / AlixPartners

The competitive social entertainment sector — sometimes called 'eatertainment' or 'competitive socializing' — has grown 386% since Cushman & Wakefield began tracking it in 2021. The sector includes concepts like Topgolf, Dave & Buster's, Flight Club (darts), Puttshack (mini-golf), and F1 Arcade. The immersive entertainment market is projected at \$116.8 billion by 2025, growing at 23.4% CAGR.



The Entertainment / Competitive Social Entertainment Sector

Competitive Social Entertainment Market Growth (Index, 2021 = 100)



Source: Cushman & Wakefield (2024). Competitive social entertainment concepts tracked from 2021 baseline.



Critical Sector Warning: The Novelty Trap

Research from AlixPartners and FSR Magazine highlights a persistent risk in the eatertainment sector: the novelty trap. Concepts like Topgolf have seen same-store sales decline after initial years of high revenues — Topgolf saw same-store sales deteriorate and is now pursuing a spin-off from Callaway. Dave & Buster's reported a comparable store sales decline of 8.3% in Q1 2025. The key variable separating sustainable concepts from novelty plays is visit frequency. A frequency of 3+ visits per year is considered the minimum threshold for long-term unit economics viability.



Critical industry insight: 'Brands that rely on novelty face the same structural challenge as Topgolf — first-year revenues are high, but repeat visit rates are insufficient to sustain long-term economics.' — FSR Magazine / AlixPartners, 2025



CURRENT MISSION, VISION & BRAND IDENTITY



Current Mission Statement (Inferred)

To bring the excitement, glamour, and thrill of Formula 1 driving to the masses — through world-class racing simulators, premium hospitality, and an electric social atmosphere that makes F1 accessible to everyone, regardless of skill or prior knowledge of the sport.

Current Vision Statement (Inferred)

To become the world's leading experiential sports hospitality brand — the global home of Formula 1 fandom — present in every major city and accessible to every type of guest, from die-hard F1 fans to first-time visitors.





Current Brand Identity

Brand Tagline — "Race against your mates" / "F1 for everyone" — democratizing the F1 experience

Visual Identity — F1 official brand colors: red, black, silver — licensed IP use throughout venues

Tone of Voice — Inclusive, energetic, premium yet accessible — deliberately not 'expert only'

Interior Design — Premium industrial: F1 car liveries, team walls, full-motion simulators, large viewing screens

Food & Drink — Executive chef (Gordon Ramsay background), world-class beverage director — hospitality-first positioning

Game Experience — 60 full-motion simulators per venue; 5 skill levels; 4 racing modes

Key Brand Quote — "We are a hospitality business first" — CEO Jonathan Peters (FSR Magazine, 2025)



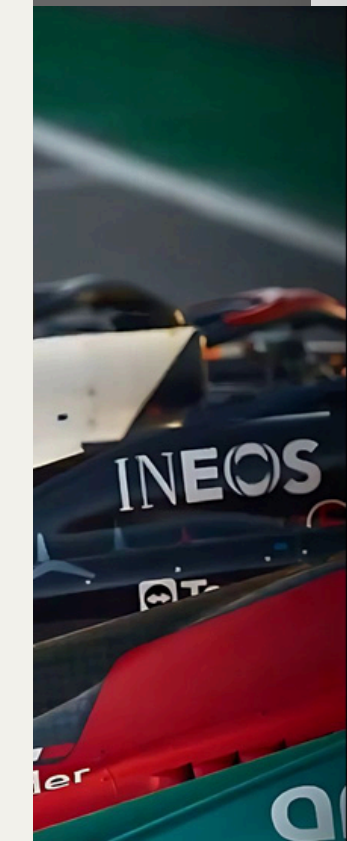
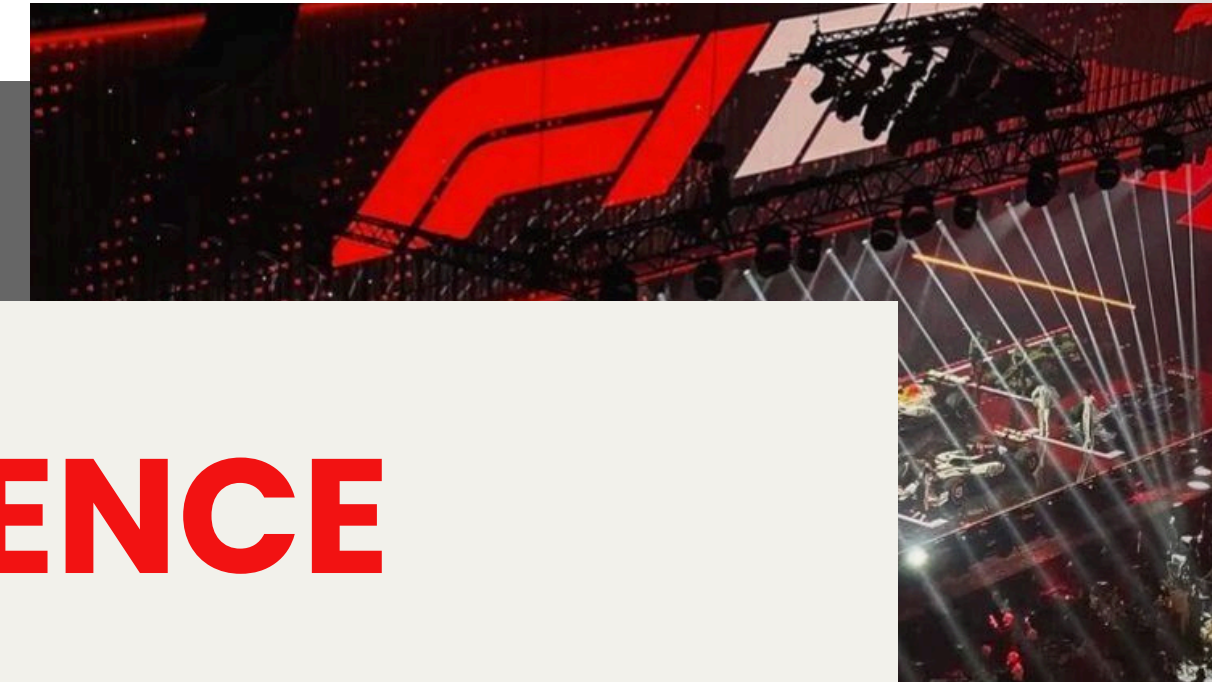
F1 Parent Brand Marketing Context

F1 Arcade benefits directly from Formula 1's own marketing infrastructure. F1's marketing director Donna Birkett Baida describes the brand's 2026 focus as positioning F1 as a 'forward-thinking premium sports and lifestyle brand', releasing the 'All To Drive For' campaign featuring all drivers and F1 The Movie's Damson Idris. F1's social platforms exceeded 65 million followers in 2024, with TikTok surpassing 15 million and YouTube crossing 10 million subscribers. F1 Arcade inherits significant earned media from this parent brand momentum.



CURRENT TARGET AUDIENCE

- DEMOGRAPHICS
- PSYCHOGRAPHICS
- GEOGRAPHICS
- BEHAVIORS



Demographics

Stated Gender Split — 50/50 male and female — US President Jon Gardner, Motorsport.com 2024

Age Profile — Primary: 21–40; skews toward 25–35 urban professionals and young adults

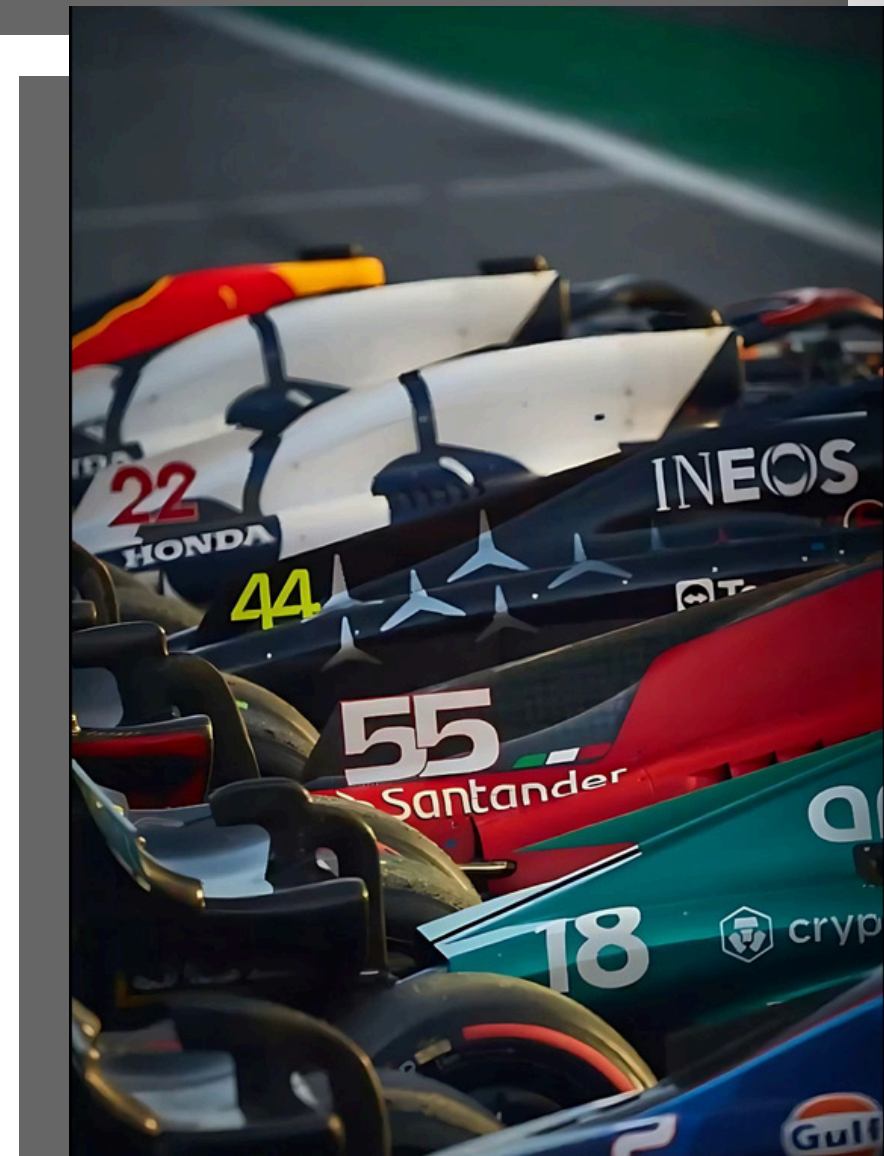
F1 US Fanbase Age — 75% of US F1 fans are under 45 (DMG Ventures investor memo, 2023)

Gender Trends (F1 Sport) — 40% of global F1 fanbase is now female (F1 CEO Stefano Domenicali, 2022) — up 8% since 2017

Income Level — Mid to upper-mid income — venue pricing reflects premium experience position

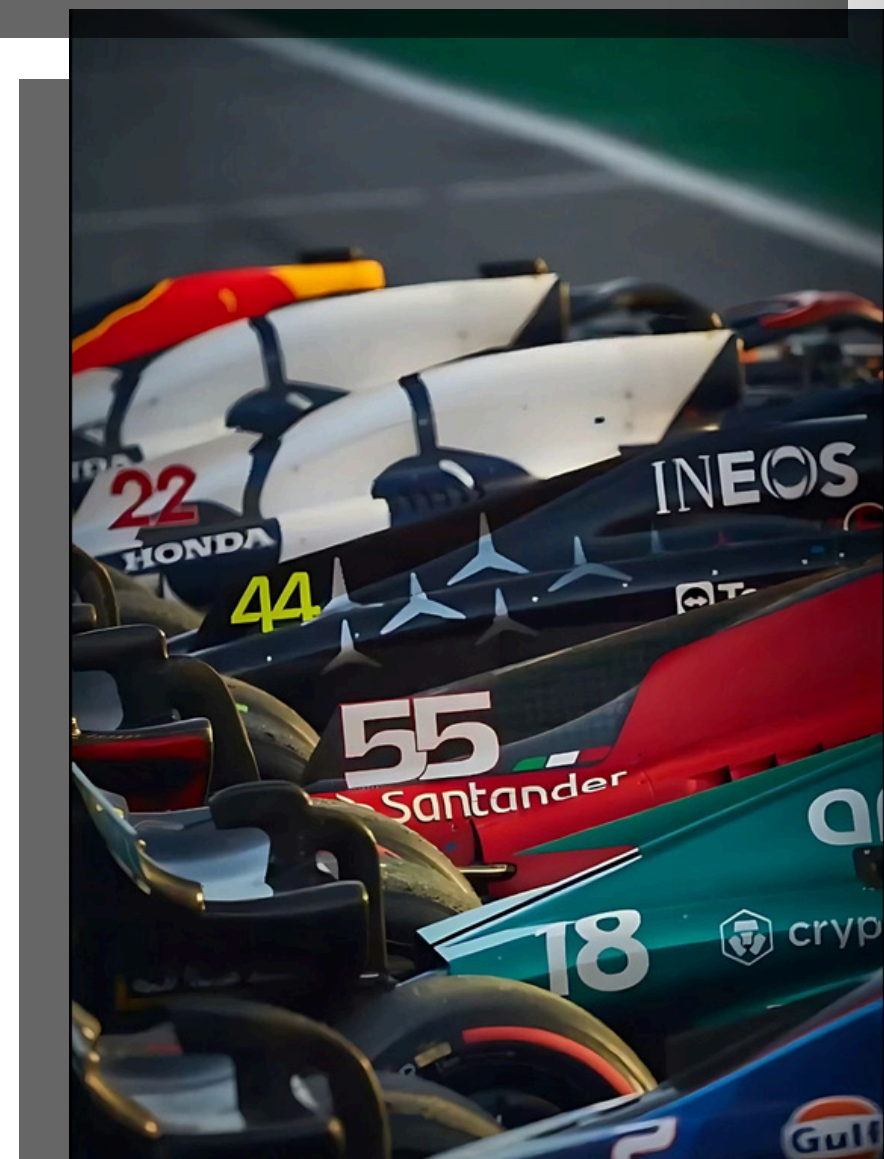
Group Composition — Friends, couples, corporate teams, families — all acknowledged as core segments

F1 Female Fan Growth — 32% of US F1 fans are female and growing (DMG Ventures, 2023)



Psychographics

- **F1 fans who want physical access to a sport they can only watch** — 'only 1% of viewers will ever attend a real race' (Jon Gardner, Motorsport.com 2024)
- **Socially motivated** — visiting for the shared experience as much as the racing itself
- **Premium but inclusive** — drawn by F1's luxury associations but not required to have prior knowledge
- **Driven by Drive to Survive gateway experience** — 53% of US adult fans cite Netflix Doc-Series Drive to Survive (DTS) as their entry point (Morning Consult, 2022)
- **Corporate event buyers** — companies seeking premium, unique group experiences
- **Couples and friend groups looking for a 'night out worth leaving the house for'** — CEO language mirrors broader entertainment trend



Geographics

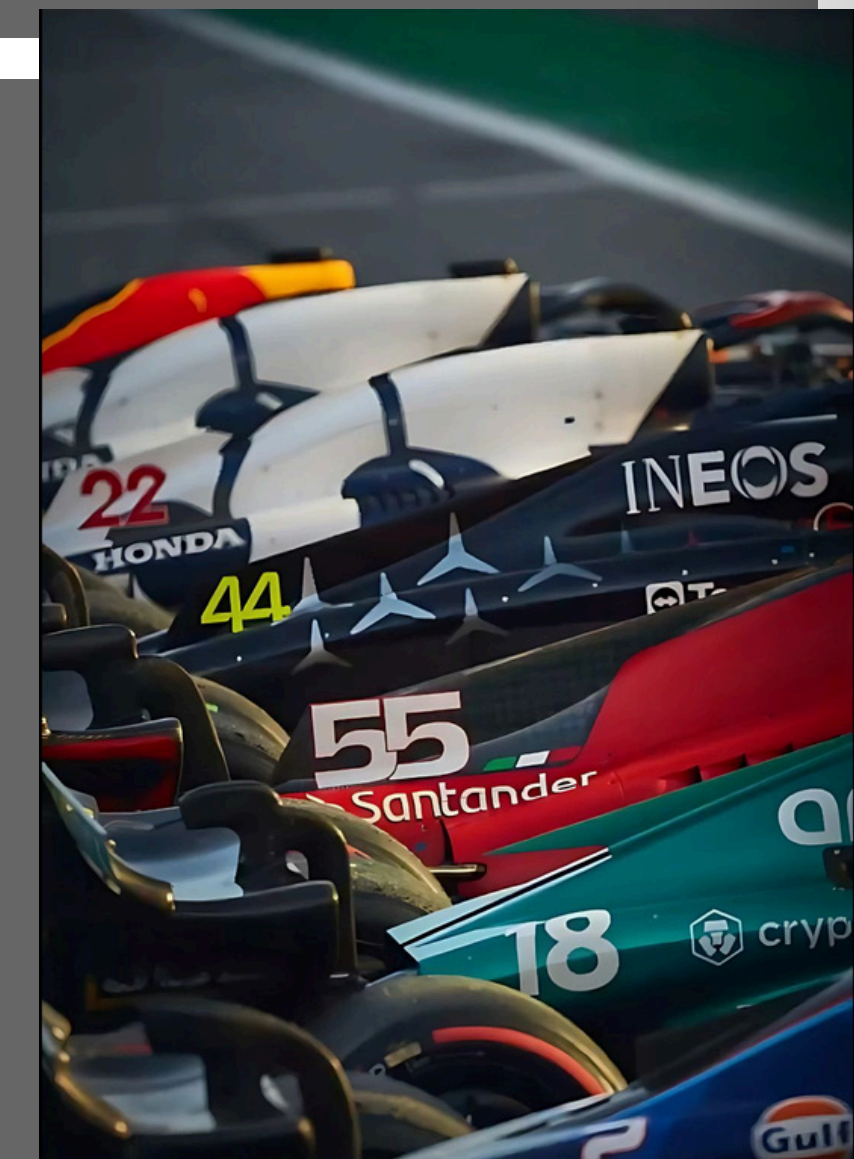
US Locations (2025) — Boston, Washington D.C., Philadelphia, Denver, Las Vegas, Atlanta

Location Strategy — High-footfall, experience-driven real estate — urban seaport and entertainment districts

Las Vegas — Flagship US location — highest tourism density, existing F1 Grand Prix tie-in

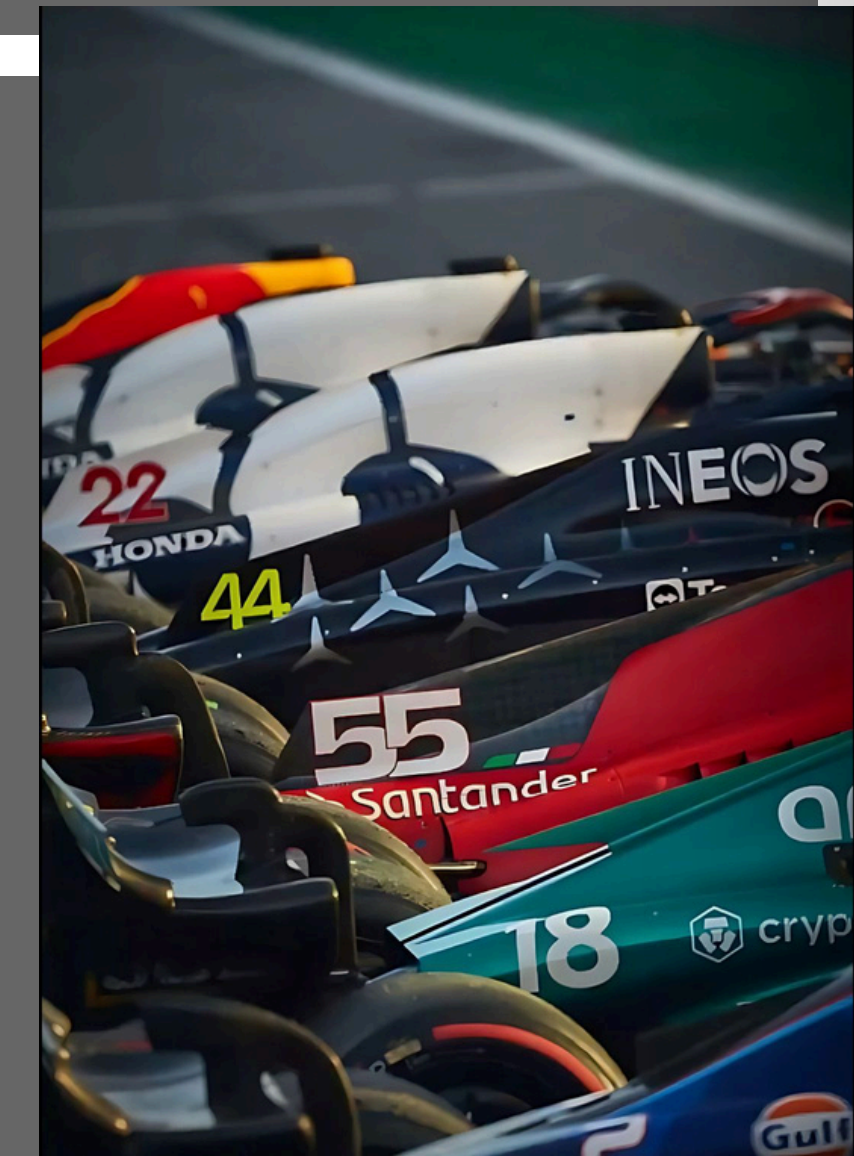
F1 Grand Prix Markets — Las Vegas (GP host), Austin (GP host — not yet a venue), Miami (GP host — not yet a venue)

Future Expansion — 5 new US locations per year — targeting cities with strong sports culture and urban entertainment density



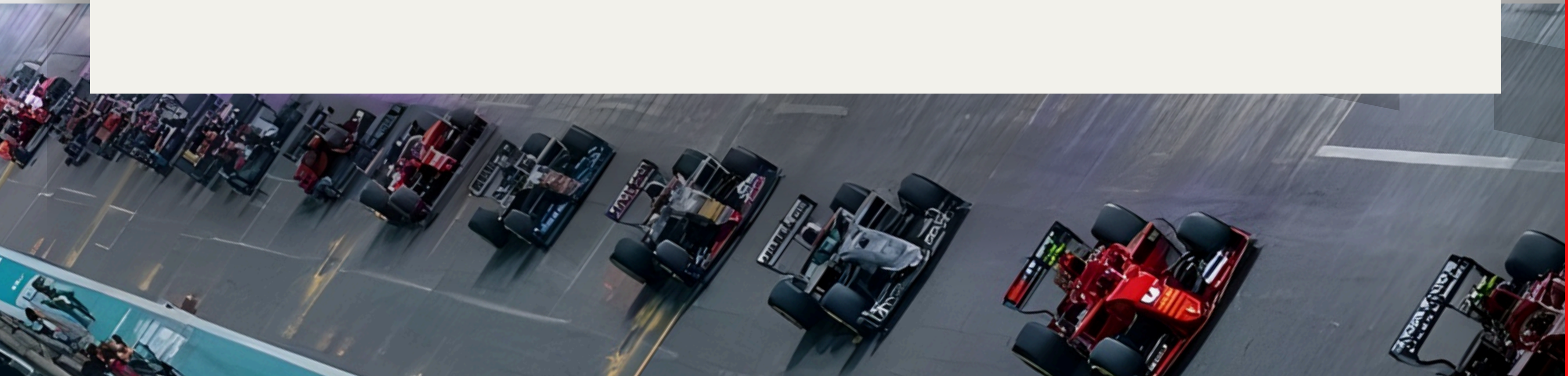
Consumer Behaviors

- **Group occasion behavior** — birthdays, corporate nights, after-work events, first dates
- **Social media sharing** — premium environments encourage Instagram, TikTok, and Snapchat documentation
- **Race weekend clustering** — existing F1 fans visit aligned with Grand Prix calendar events
- **Corporate event bookings** — high-margin group reservations are a primary revenue driver
- **Low prior-knowledge threshold** — experience deliberately designed for novices, not just racing fans





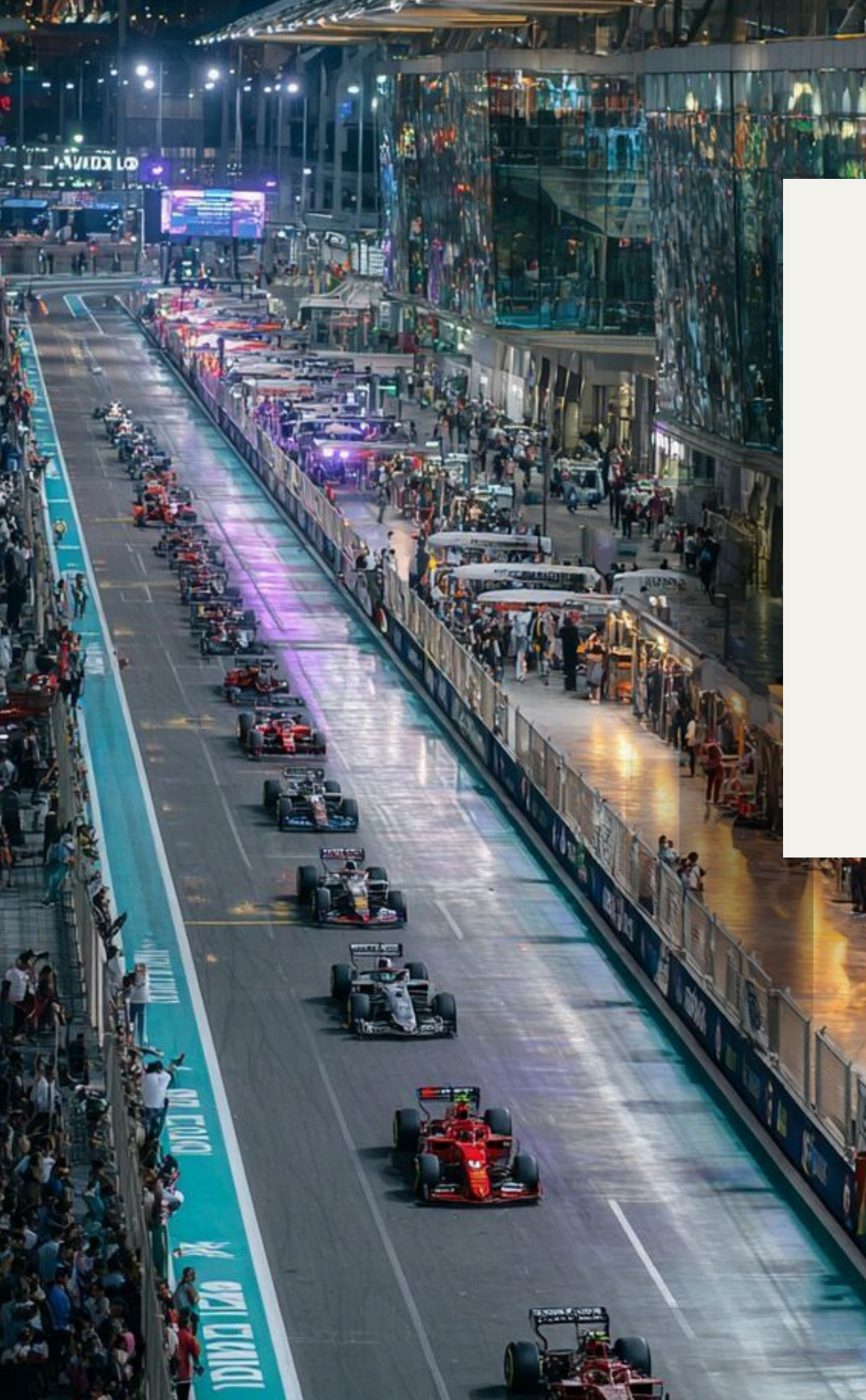
CURRENT MARKETING CHANNELS & EXPENDITURE APPROACH





Channel Strategy (Current)

F1 Arcade's current channel strategy is primarily social-first and event-led, leveraging the F1 parent brand's organic momentum rather than heavy paid media. The approach is consistent with a brand that benefits from F1's global cultural moment — earned media from F1's own campaigns, Netflix Doc-Series Drive to Survive (DTS), and race events drives significant unpaid awareness.



Channel Strategy (Current)

Branding Analysis — 2026



Channel	Role In Current Strategy	Evidence/Source
Instagram	Primary brand channel – venue photography, race day events, food and drink content	F1 Arcade Instagram: active posting, venue lifestyle imagery, race night content
TikTok	Simulator and venue experience reveals, social atmosphere content	F1 parent brand: 15M+ TikTok followers; F1 Arcade uses similar format
F1 Parent Brand	Co-marketing via F1's 65M+ social following – race weekend organic reach	Latterly.org F1 Marketing Case Study (2025)
Corporate Events	Direct sales to company event planners – high-margin group bookings	CEO Jonathan Peters: corporate entertainment described as core revenue stream (FSR 2025)
PR / Earned Media	High-profile venue openings covered by FSR Magazine, Motorsport.com, Forbes, Business Insider	Multiple editorial placements tracked across launch markets
Influencer / Creators	F1 fan creators and general lifestyle creators documenting visits	No confirmed paid creator program; primarily organic UGC
Email / CRM	Booking confirmations, race night reminders, event announcements	Standard venue booking infrastructure
Local OOH	Venue signage and city-level event promotion in launch markets	Inferred from standard hospitality brand playbook



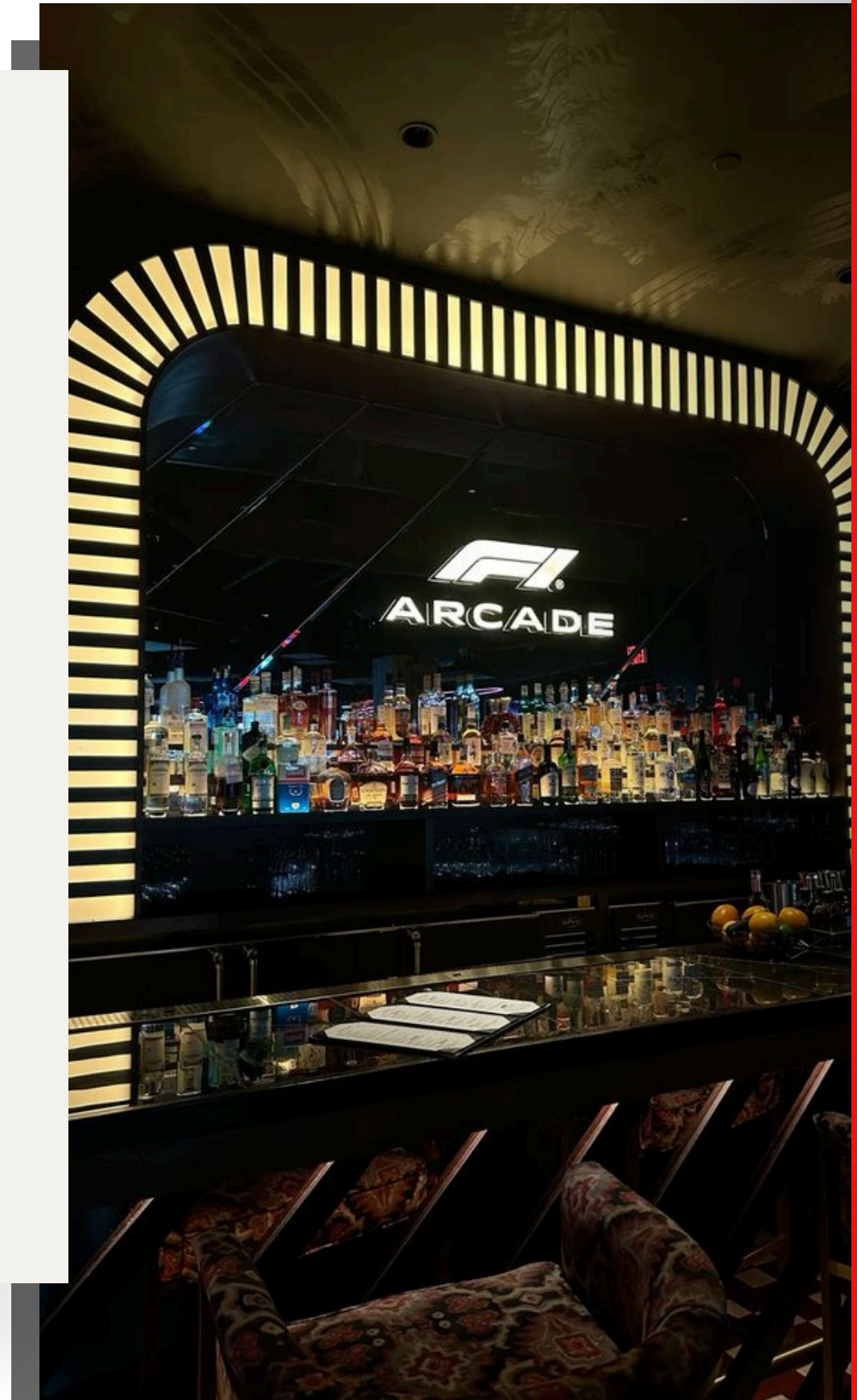
Expenditure Approach

F1 Arcade does not publicly disclose marketing expenditure breakdowns. However, the \$130M raise in July 2024 was explicitly directed toward US expansion — venue buildout, people, systems, and operational infrastructure — not primarily toward paid media campaigns. This suggests a capital-light marketing model that relies on the power of the F1 brand IP, earned media from venue openings, and organic social momentum rather than heavy paid acquisition spend.

Key inference: F1 Arcade's current marketing model is brand-led and event-driven, not performance-marketing-led. It operates closer to a hospitality brand opening play (relying on venue news, PR, and social) than a growth-stage tech startup with aggressive paid acquisition spend.



COMPETITIVE LANDSCAPE & MARKET SATURATION





Direct Competitors

Competitor	Positioning	Key Metrics
Dave & Buster's	Sports bar + arcade entertainment — the sector pioneer	Comp store sales -8.3% Q1 2025 (MatrixBCG); 'back to basics' strategy underway
Topgolf	Golf entertainment + bar + food — the entertainment standard-bearer	Same-store sales declining; pursuing Callaway spin-off (Thesis Driven, 2024)
Puttshack	Premium mini-golf + cocktails — founded by same creators as Topgolf	Strong early momentum; urban, millennial-focused; direct brand DNA comparison to F1 Arcade
Flight Club (Darts)	Competitive darts + premium cocktails — social entertainment concept	Strong corporate event revenue; upscale positioning; limited US footprint
Andretti Karting	Actual go-kart racing + food — motorsport-adjacent entertainment	Single-sport focus; lower premium positioning; does not carry F1 brand credibility
Dave & Buster's Social Bays	New 'micro social' format added 2025 — response to experiential trend	Signals mainstream competitor response; validates F1 Arcade's concept direction

F1 Arcade's Competitive Advantages

- **Exclusive F1 license** — no competitor can replicate the official brand, IP, or livery rights
- **First-mover in motorsport entertainment** — no comparable concept at scale in the US market
- **Built by Puttshack founders** — direct experiential entertainment DNA from the Topgolf lineage
- **Hospitality-first positioning** — food and beverage treated equally to the gaming experience, unlike most entertainment competitors
- **F1 cultural momentum** — the sport's US fanbase growing at 11% YoY provides an organic marketing engine



Competitive Risks

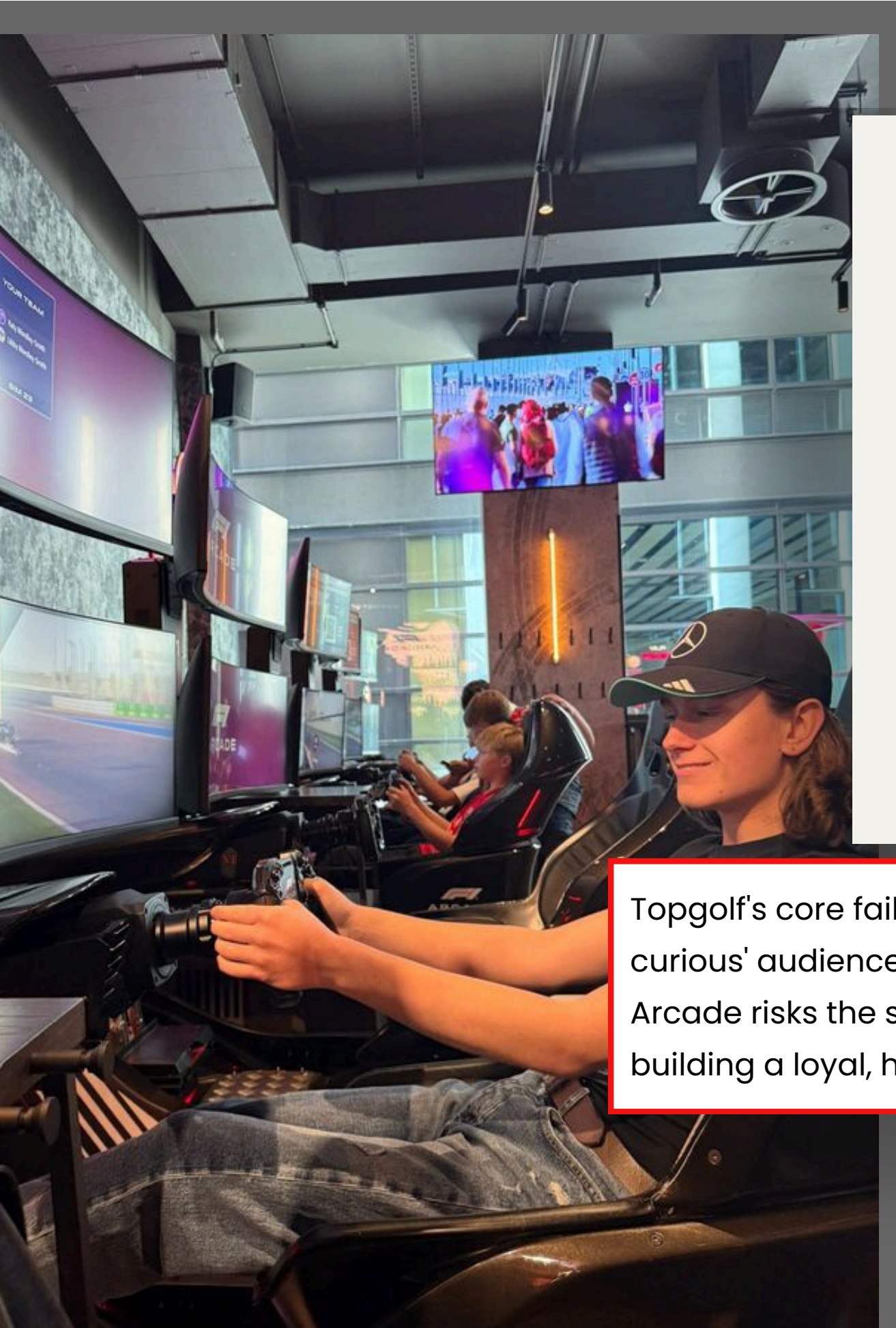
- **Novelty trap** — same structural vulnerability as Topgolf: high first-year revenues followed by visit frequency decline
- **Topgolf warning: averaging only 1.5 visits per year per customer** — below the 3+ threshold for viable long-term economics (EMERGING/AlixPartners)
- **Broad audience strategy creates identity dilution** — targeting 'everyone' risks owning no specific segment deeply
- **Geography gap: Austin (440K GP attendees), Miami (270K GP attendees)** — the two most F1-engaged US cities have no F1 Arcade location as of 2025
- **Corporate event dependency creates revenue cyclicality** — discretionary corporate spending is sensitive to economic conditions





F1 ARCADE — REVISED MARKETING STRATEGY

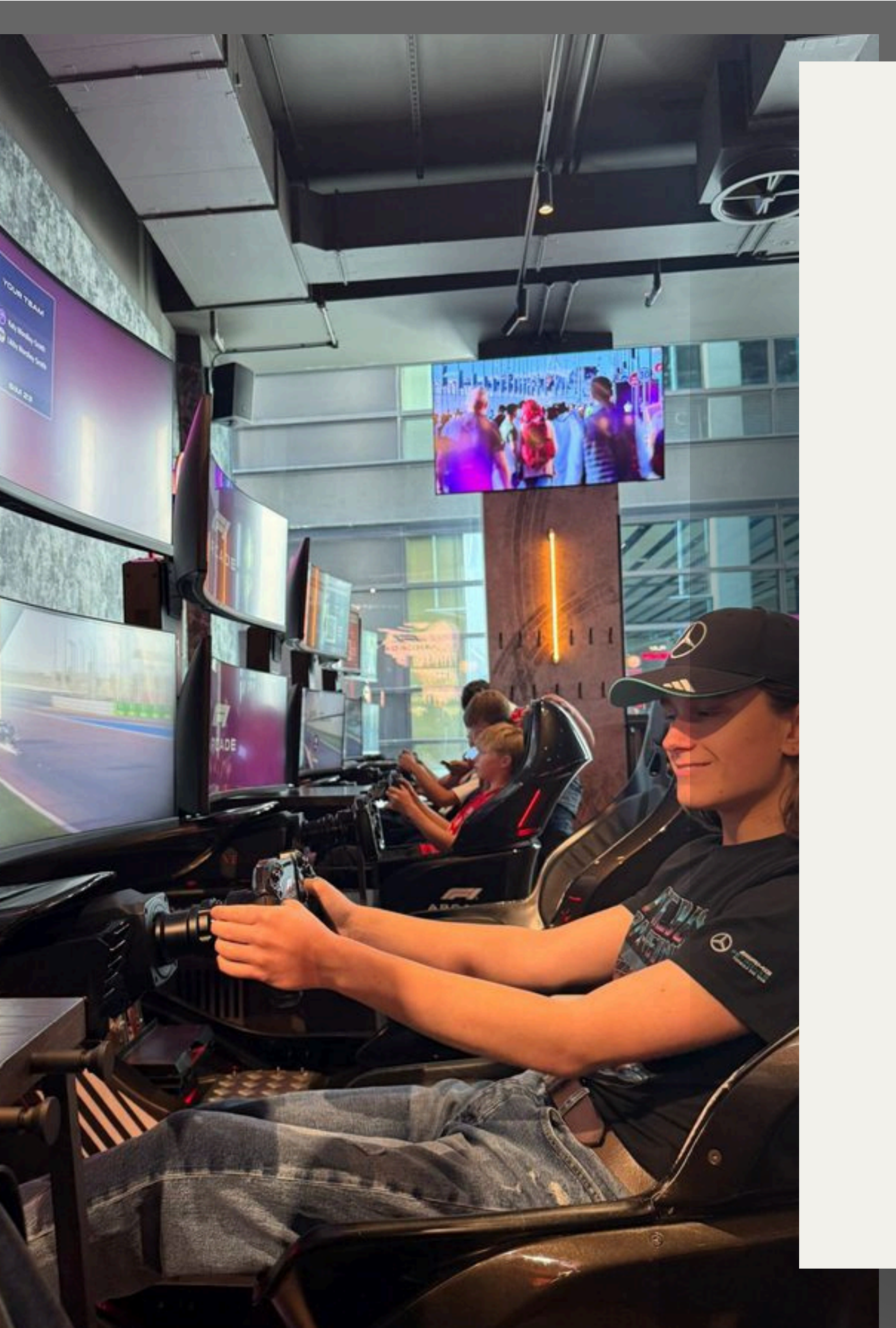
**STRATEGIC DIAGNOSIS — WHERE THE CURRENT
STRATEGY FALLS SHORT**



The Core Problem: Broad Positioning in a Repeat-Visit Business

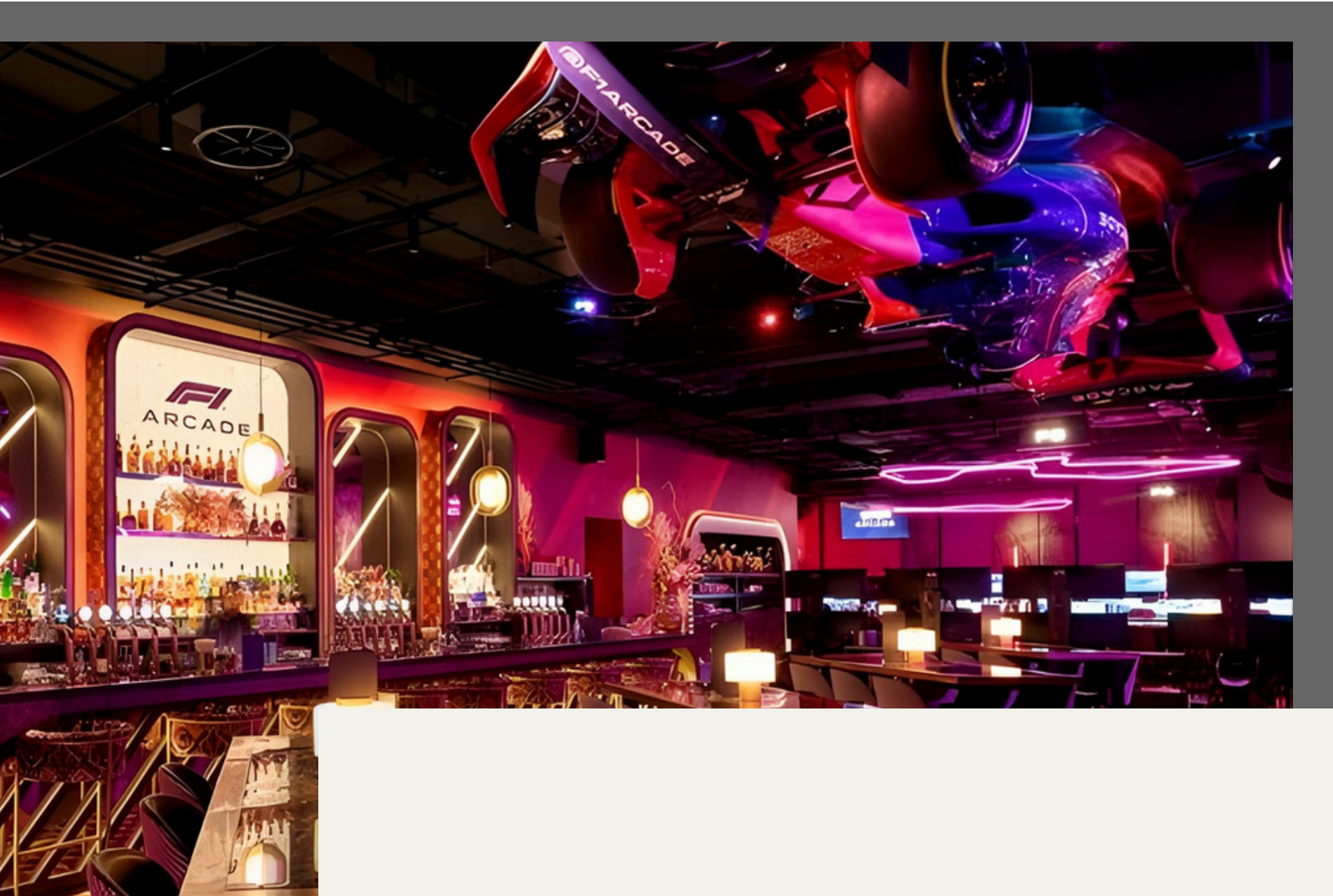
F1 Arcade's stated goal of marketing 'to a wide audience' and achieving a 50/50 gender split is admirable for inclusivity — but it creates a significant strategic risk in the eatertainment sector. The sector's unit economics require 3+ visits per year per customer. Broad positioning attracts first-time visitors. Deep positioning builds the repeat visitor base that sustains long-term revenue.

Topgolf's core failure — averaging 1.5 visits per year — was rooted in targeting 'golf-curious' audiences who came once, experienced the novelty, and did not return. F1 Arcade risks the same trajectory if it relies on 'F1-curious' first-timers rather than building a loyal, high-frequency F1 fan community.

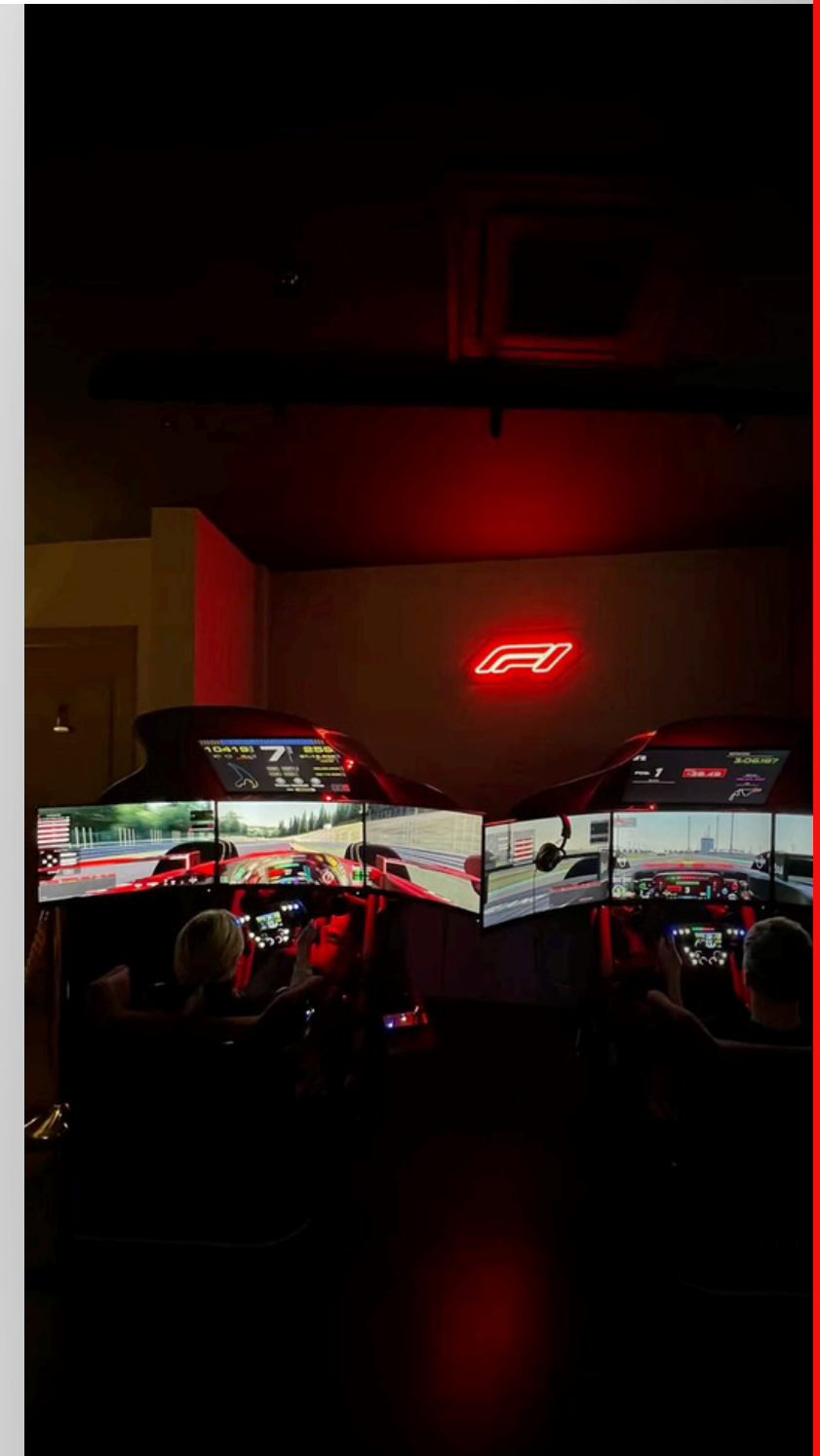


Identified Gaps in the Current Strategy

- **No seasonal race calendar integration:** F1 runs 24 race weekends per year — F1 Arcade has no documented campaign cadence built around this built-in content and activation calendar
- **Geography gap:** Missing the two most F1-dense US markets: Austin (440K Grand Prix attendees) and Miami (270K Grand Prix attendees) have no F1 Arcade location
- **Loyalty program not prominently marketed:** no public-facing 'Race Pass' or loyalty mechanic visible in current channel strategy
- **Underutilizing the college and Gen Z demographic:** 43% of F1's global fanbase is under 35 and 51 million fans under 35 joined in 2025 — F1 Arcade's current positioning skews older professional
- **Weak local community strategy:** the brand treats each venue as a standalone event location rather than a recurring local community hub
- **Corporate:** Event dependency creates revenue fragility: heavy reliance on corporate bookings makes the business sensitive to economic conditions without a strong walk-in and recurring consumer base



REVISED MISSION, VISION & VALUES



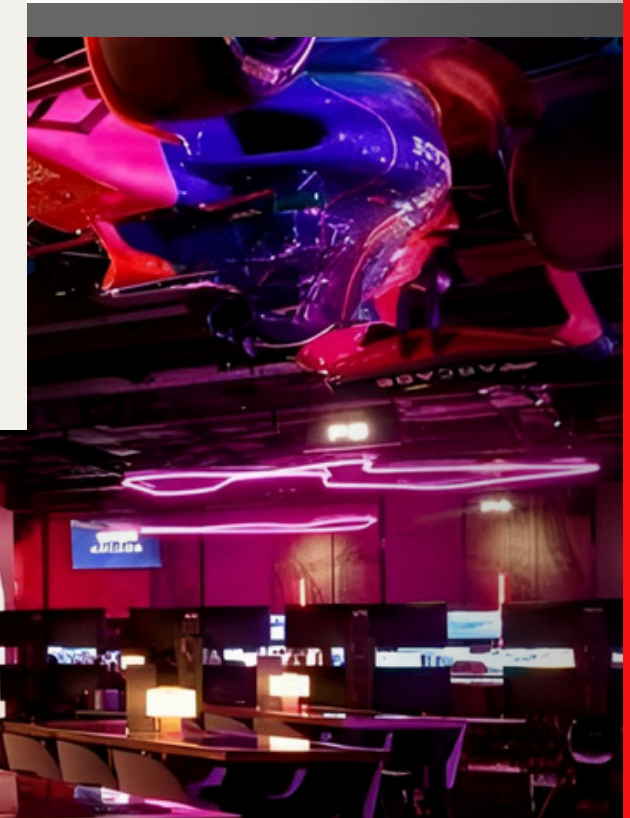


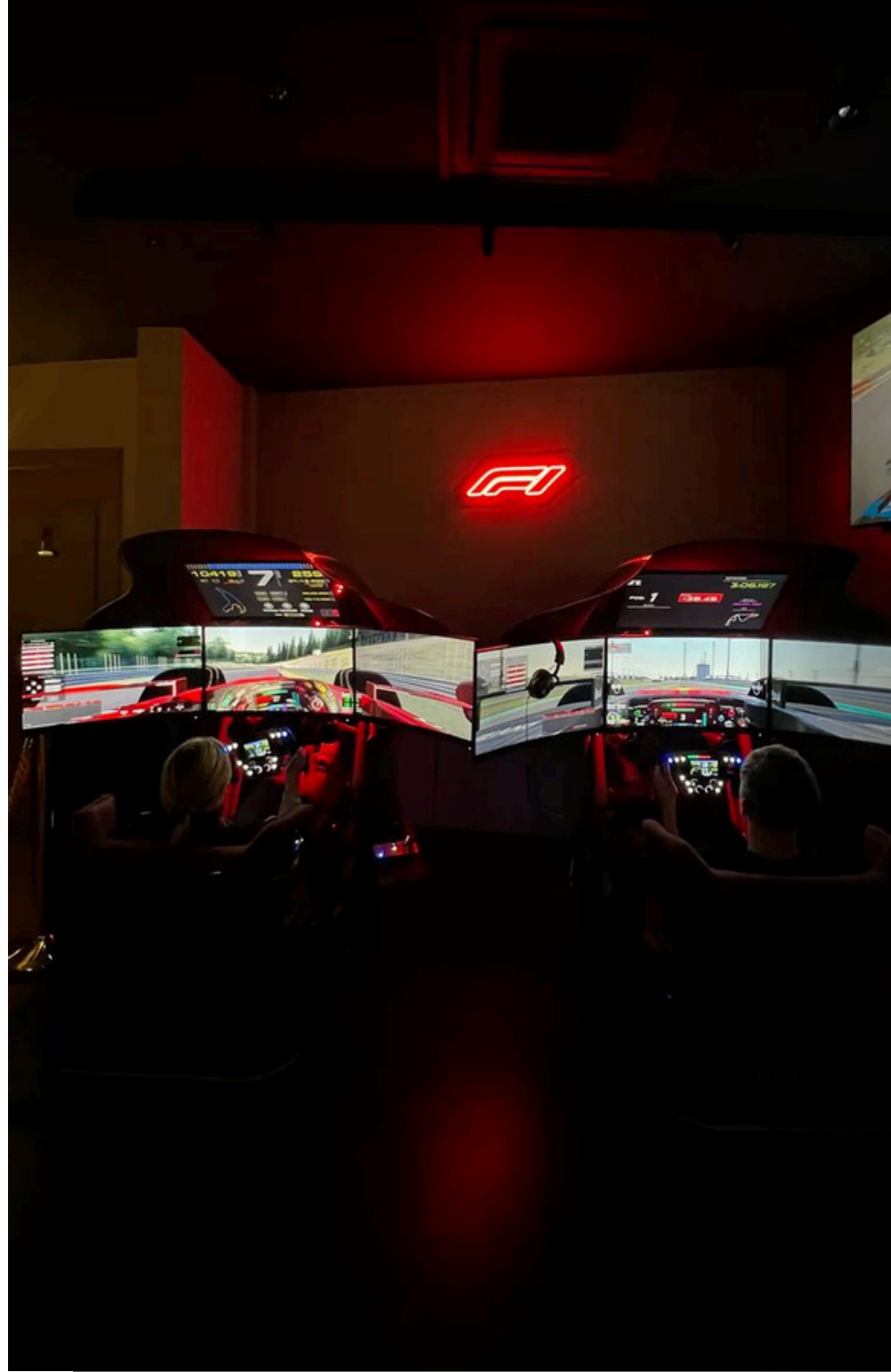
Revised Mission Statement

To turn every Formula 1 fan in America into an active participant — by creating the physical home of F1 culture in cities across the US, where the race never stops and every visit feels like being at the race.

Revised Vision Statement

To be the most visited sporting entertainment venue in America for the 18–35 demographic — a venue brand so embedded in F1 fan culture that race weekend without F1 Arcade feels incomplete.





Revised Values

The Race is the Reason — Every decision — from content to staffing to events — serves the F1 fans need to feel closer to the sport his/her love

Frequency Over Novelty — We build loyalty, not one-off visits; Every program, event, and reward is designed to bring people back

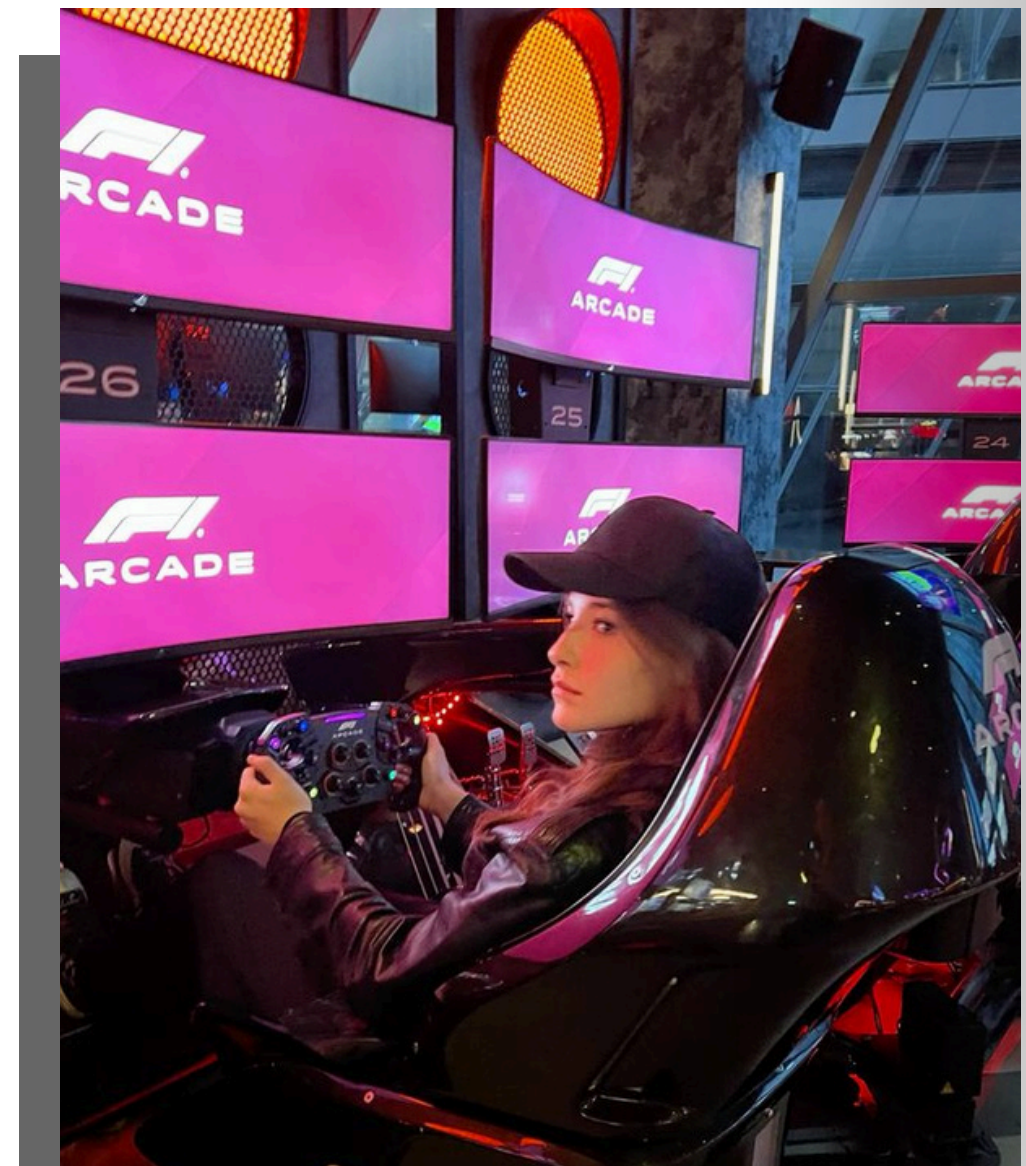
Fans First, Tourists Second — The core customer is a passionate F1 fan; Casual visitors are welcome — but we design for the fan who comes back every race weekend

Seasonal Always-On — We follow the F1 calendar; 24 race weekends = 24 campaign and event activations every year

Community, Not Just Venue — F1 Arcade is where local F1 fans gather — it belongs to the community of fans in each city, not just to the brand

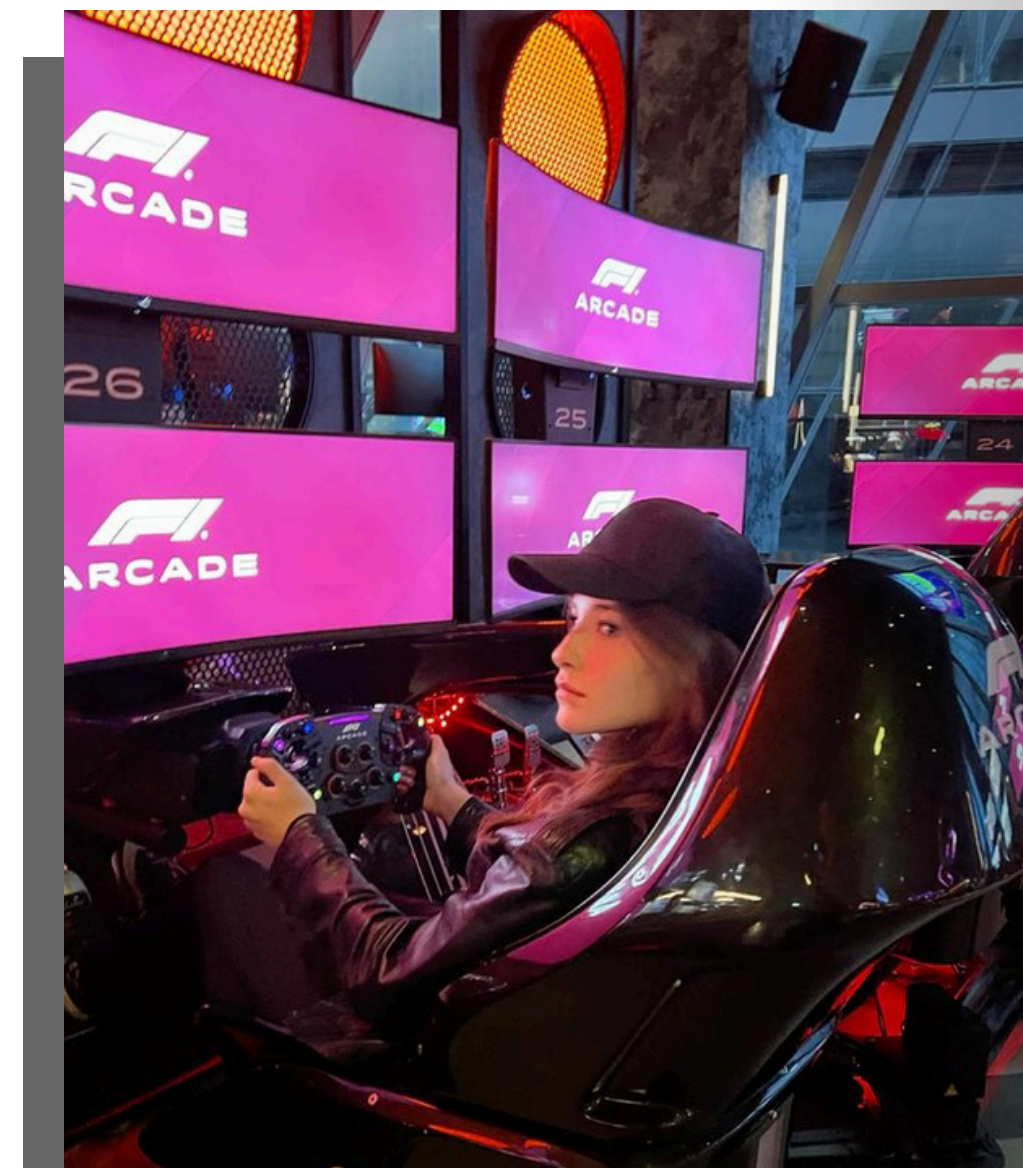


REVISED TARGET AUDIENCE STRATEGY



Strategic Audience Shift

The revised strategy sharpens audience targeting without excluding casual visitors. The current 'everyone' approach sacrifices depth for breadth. The new model identifies three priority segments ranked by repeat-visit potential — then builds the marketing, programming, and loyalty infrastructure around those segments specifically.



Revised Segment 1 — The F1 Fan (Core, Highest Repeat Potential)

Age — 18–34, male-skewing (F1's US fanbase is still 68% male despite growth in female fans)

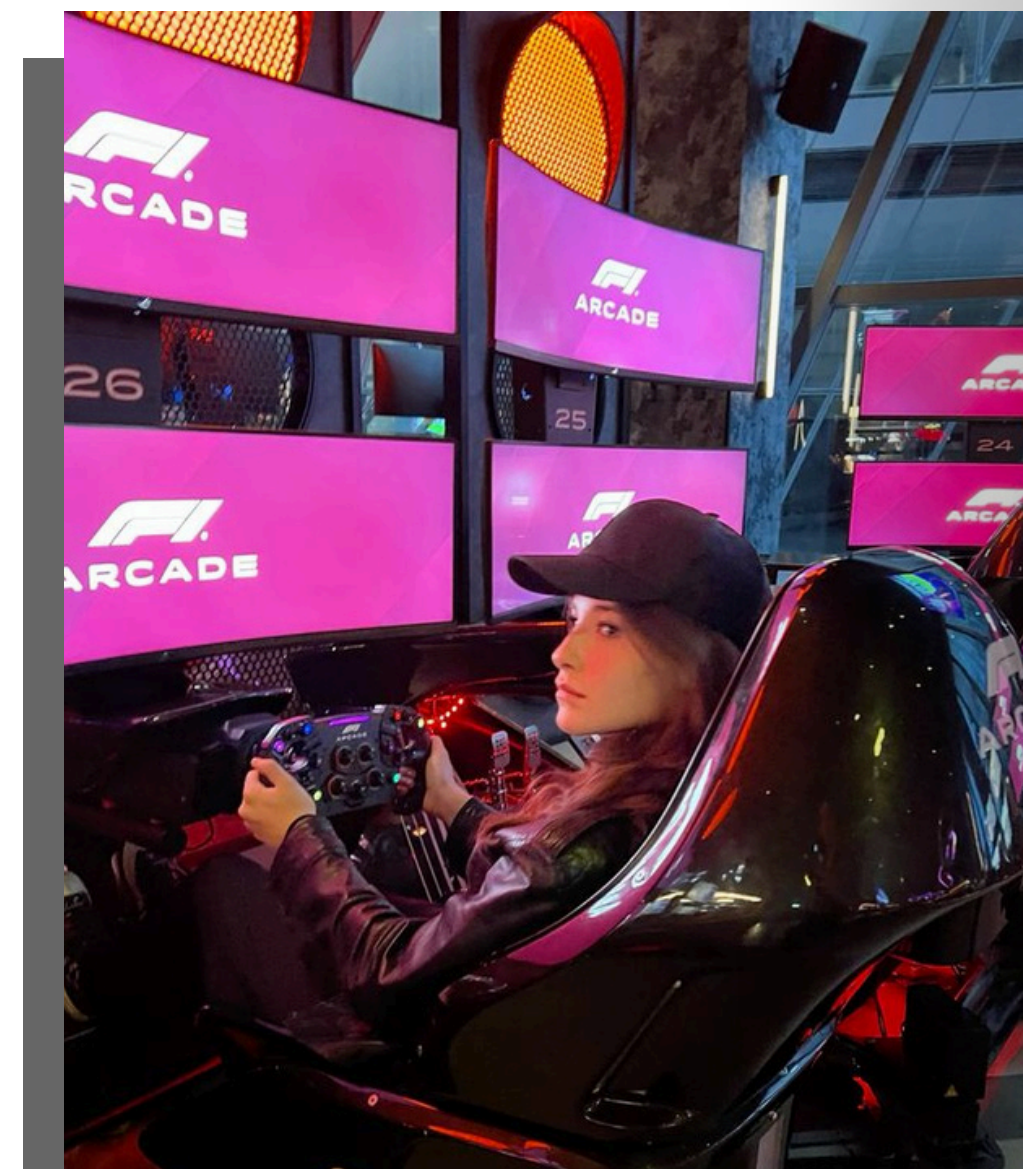
Profile — Watches every race, knows the drivers, follows teams on social media, has a favorite team

Behaviors — Will attend every race weekend event if it exists — 24 times per year visit potential

Pain Point — Nowhere to watch the race with other local F1 fans in an environment that matches their passion level

F1 Arcade Fix — Race night events every Grand Prix weekend — reserved seating, live commentary, driver trivia, themed food

Why This Matters — This segment drives 3+ visits per year — the minimum viable threshold for unit economics



Revised Segment 2 — College and Young Adult (Under-Served, High Growth)

Age — 18–24, university and early career

Profile — Discovered F1 via Drive to Survive or F1 The Movie; follows culture as much as racing; socially motivated

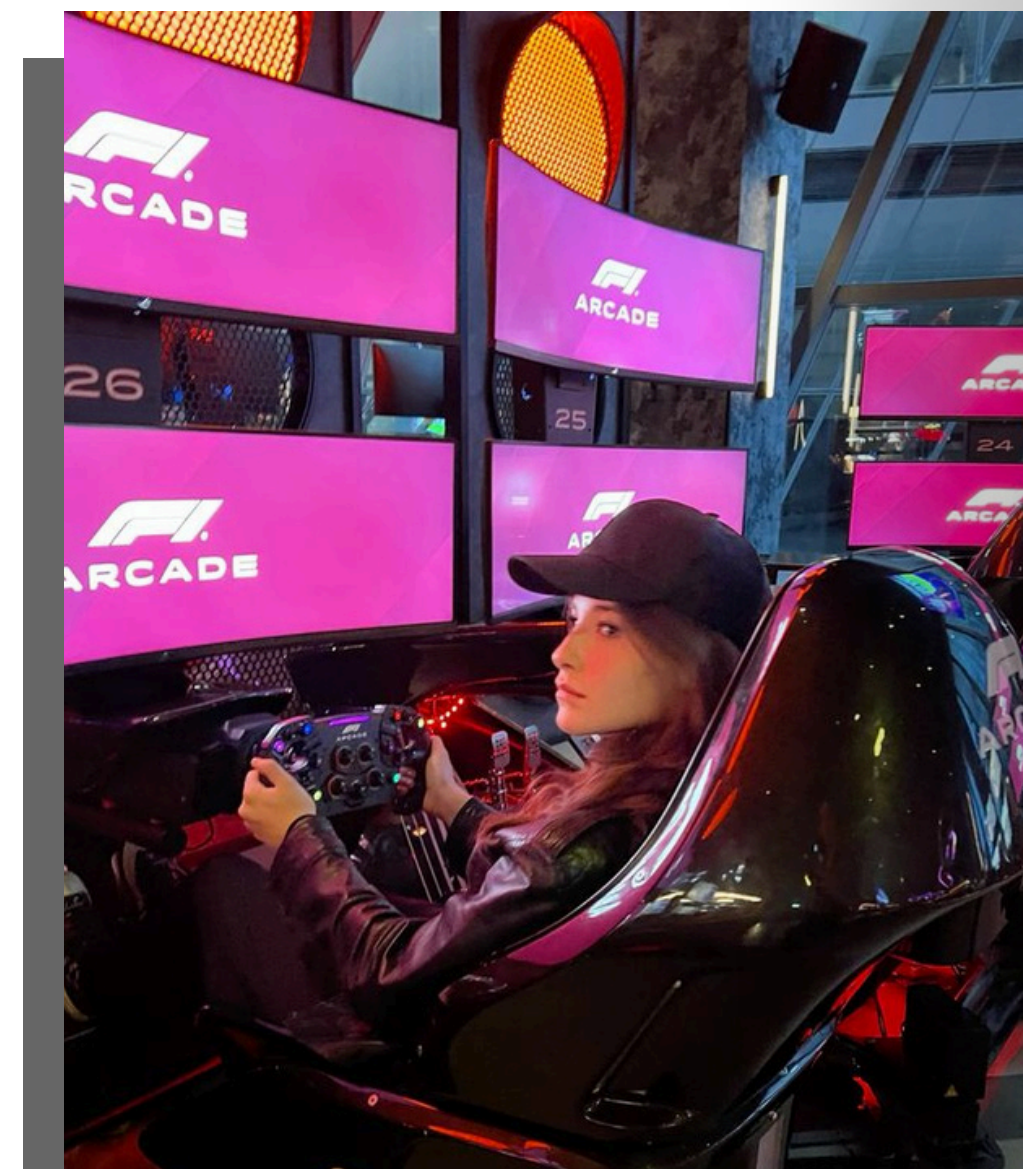
Behaviors — Group occasion visitor — birthdays, end of semester, friend group nights out

Pain Point — Premium venue feels inaccessible or intimidating; no student-specific hook

F1 Arcade Fix — Student discount tier + campus ambassador program + semester race night packages

Why This Matters — 43% of F1's global fanbase is under 35; this segment converts to high-frequency fans as they age

Evidence — F1's global fanbase attracted 51M fans under 35 in 2025 alone — this demographic is F1's fastest growth engine (Marketing Week, March 2026)



Revised Segment 3 — Corporate and Group Event Buyer (Revenue Anchor, Retain)

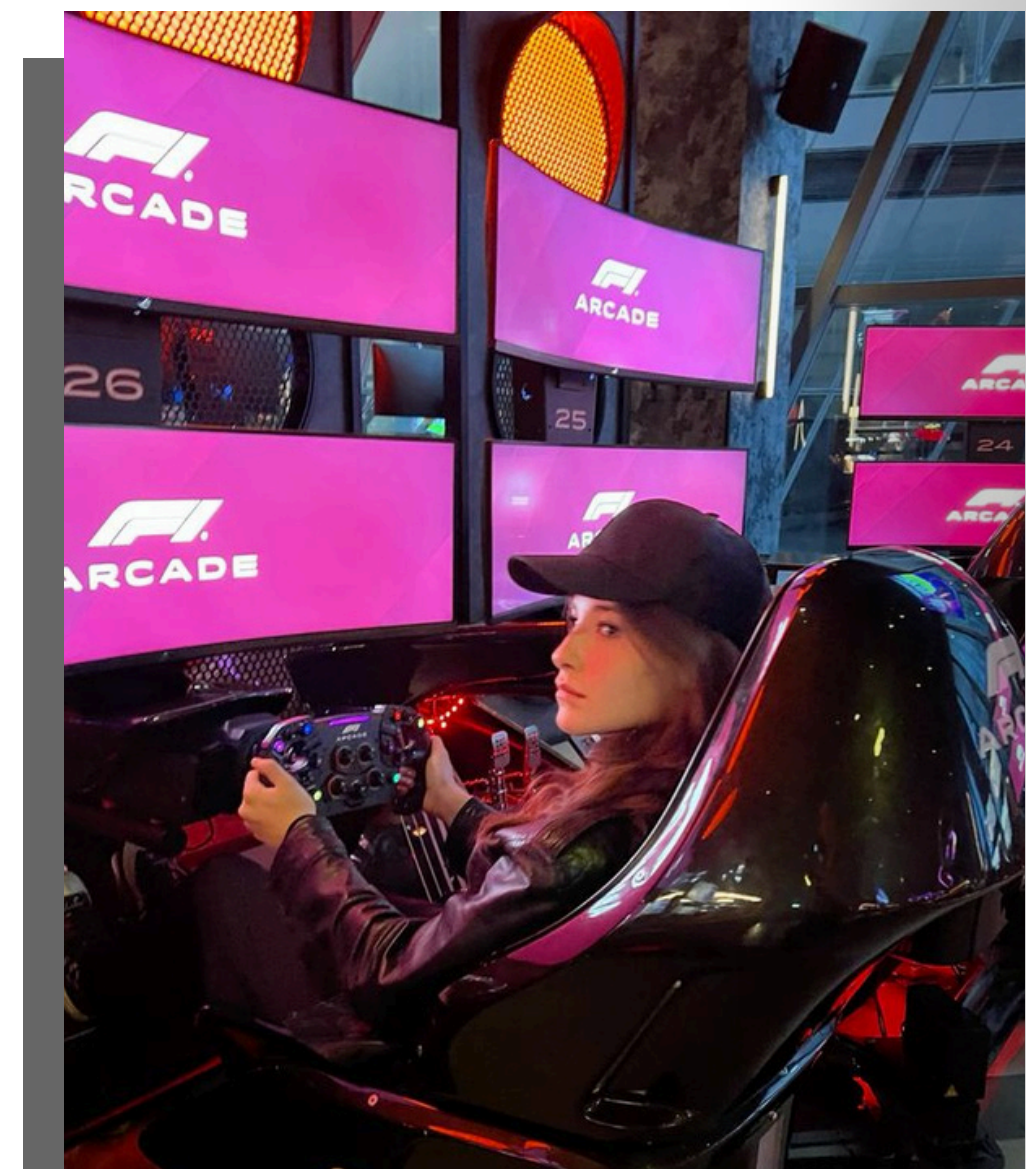
Age — 28–50, event planners, team leaders, HR managers

Profile — Plans company social events, team building, client entertainment

Behaviors — High spend per head, books in advance, repeats annually

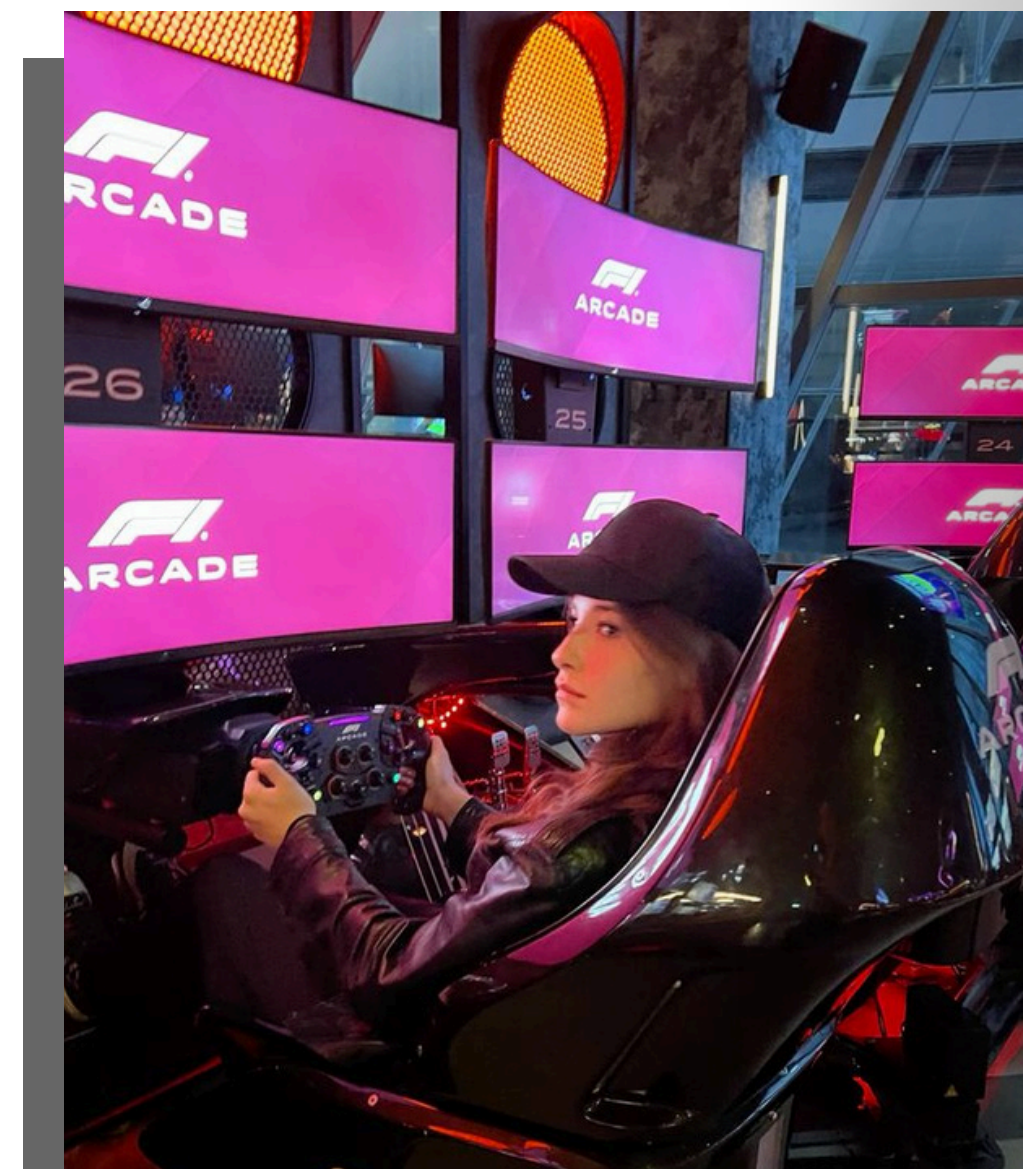
F1 Arcade Fix — Dedicated B2B sales playbook, team championship formats, quarterly corporate packages

Why This Matters — This segment remains the high-margin anchor — but cannot be the primary acquisition strategy



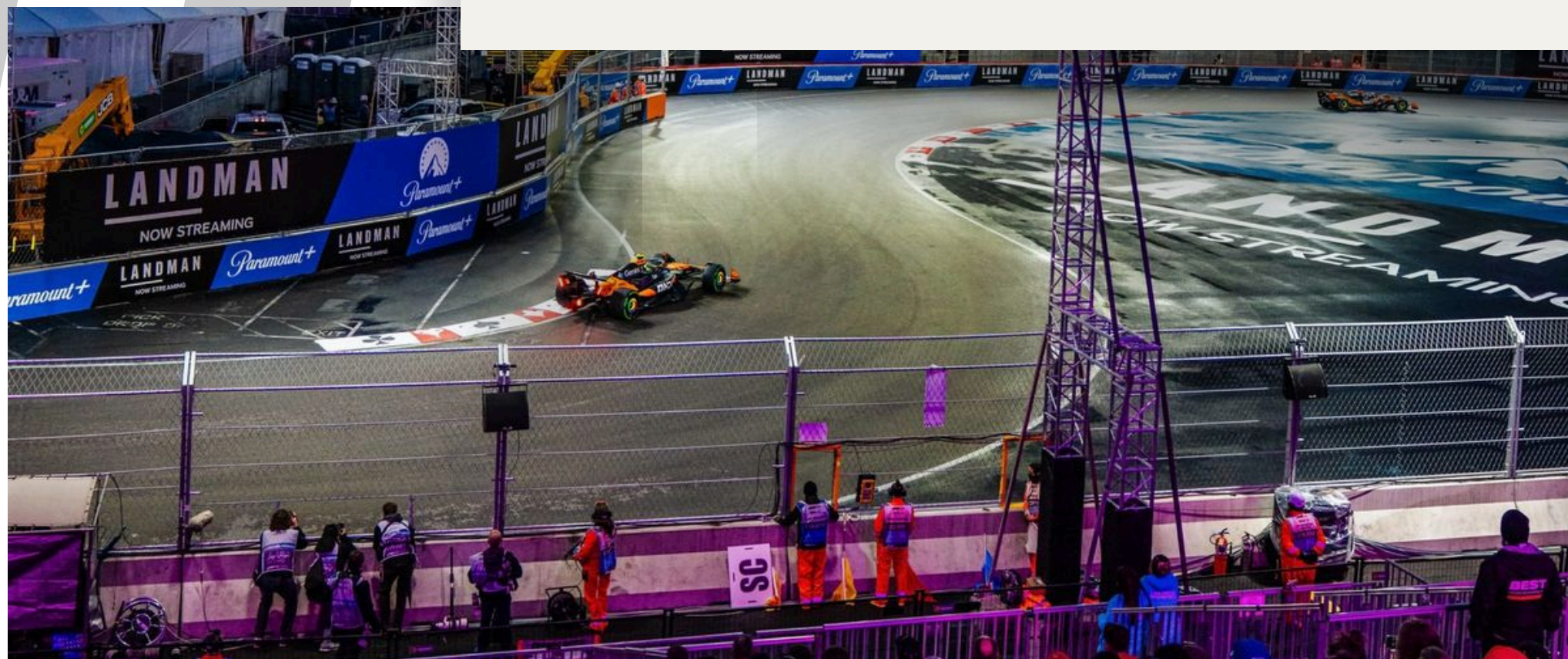
De-Prioritized: The General Public / Non-Fan Walk-In

The current strategy prioritizes this segment by marketing 'to everyone'. The revised strategy does not exclude this audience — they remain welcome and the experience is still accessible — but the primary marketing investment shifts away from generic lifestyle advertising toward F1-fan-specific channels and programming. The general audience will still discover the venue organically through word of mouth, earned media, and local search. They no longer anchor the campaign strategy.



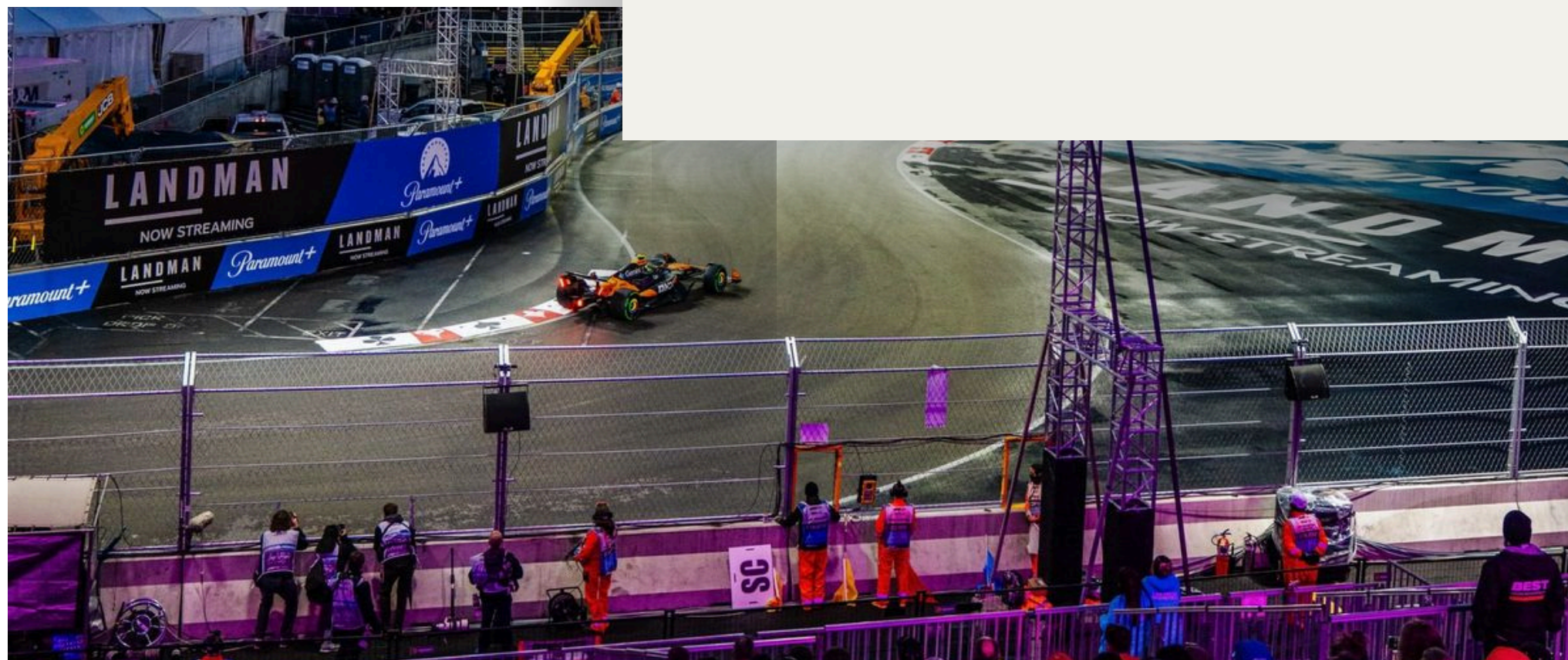


REVISED BRAND IDENTITY & POSITIONING



Revised Brand Position

F1 Arcade is not an entertainment venue that happens to have F1 simulators. It is the official home of F1 fandom in America — where the race weekend starts before qualifying and ends after the debrief. Built for fans. Open to everyone.



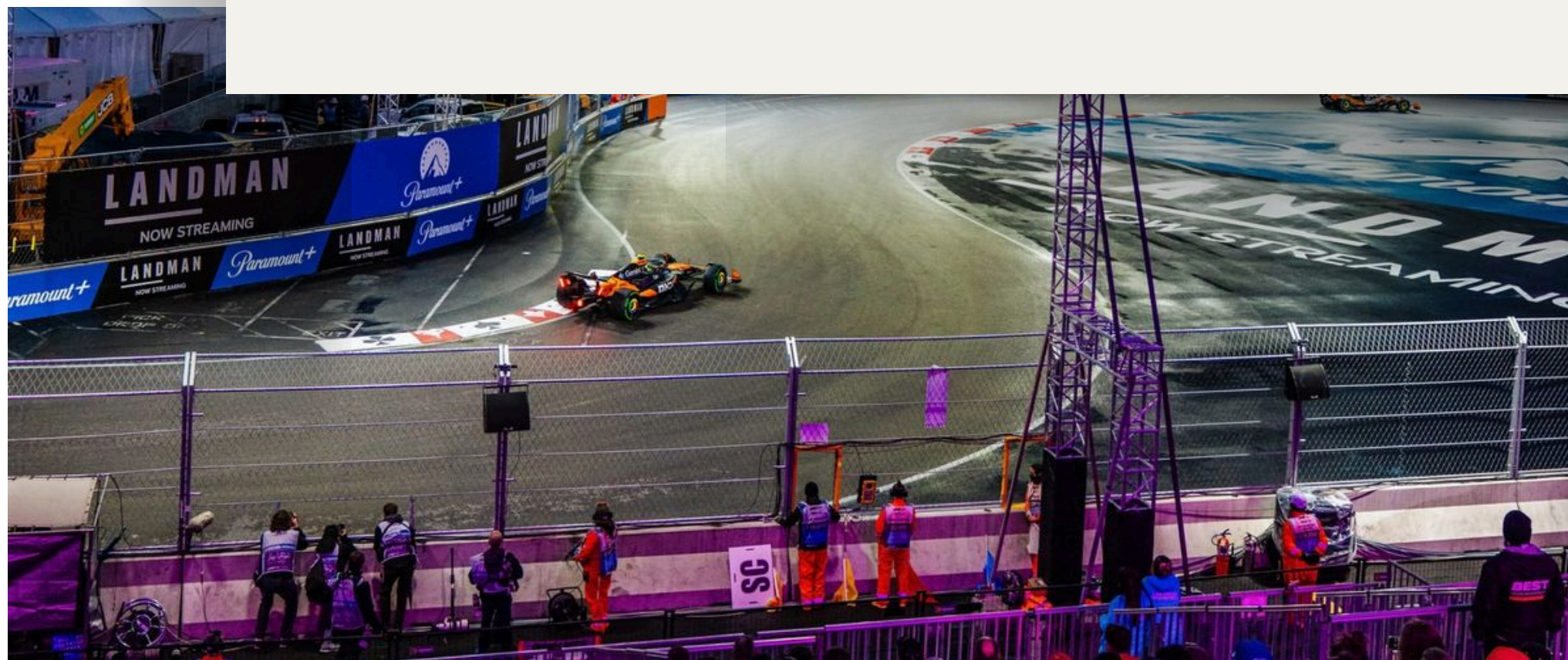
Revised Tagline

"Race Night, Every Race Night."

This tagline does two things: it positions F1 Arcade as the default destination for every Grand Prix weekend, and it signals a program commitment — not just a one-off experience. It replaces the current implied 'come once' promise with a recurring 'this is your race weekend home' identity.

Secondary Tagline Options

- "The Only Seat Left in the Race."
- "24 Races. 24 Reasons to Come Back."
- "Where F1 Lives Between Sundays."



Revised Visual Identity Direction

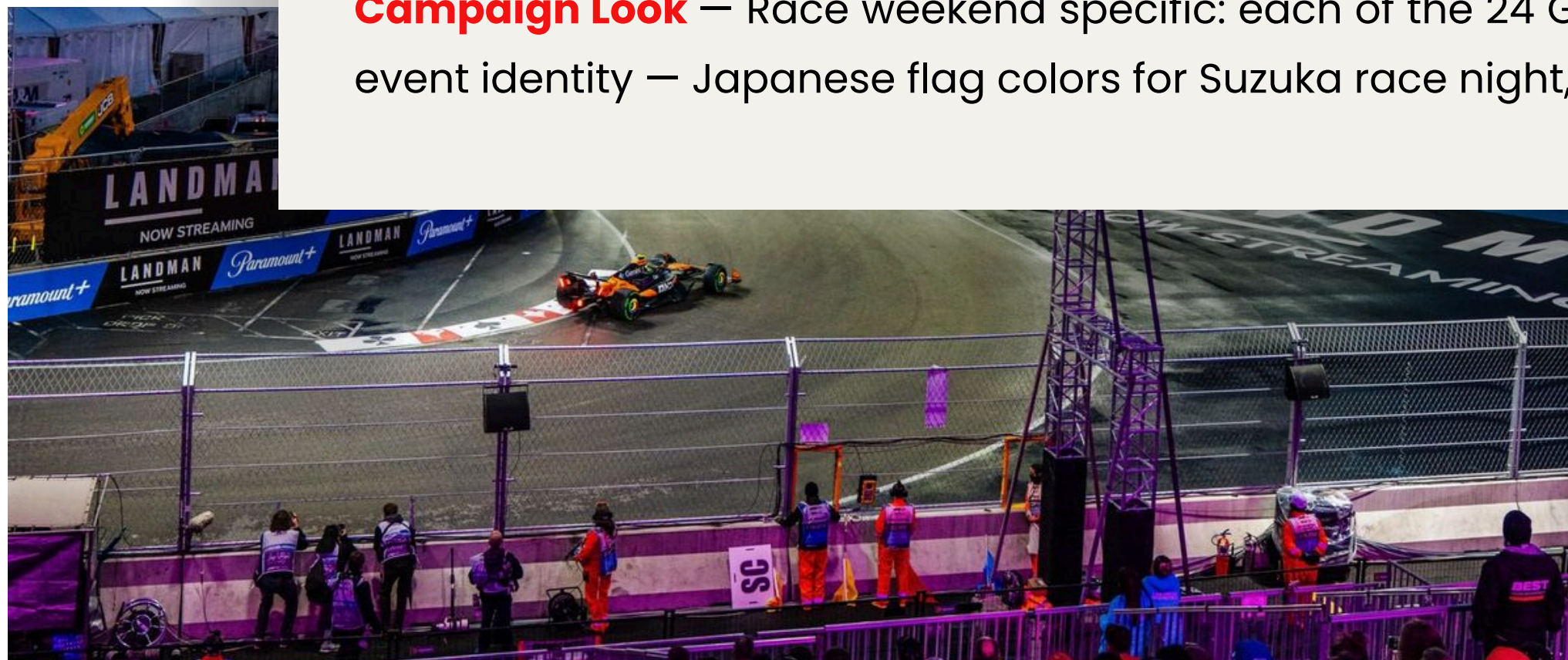
Keep — F1 official red/black — this is a licensed brand asset and a massive equity signal

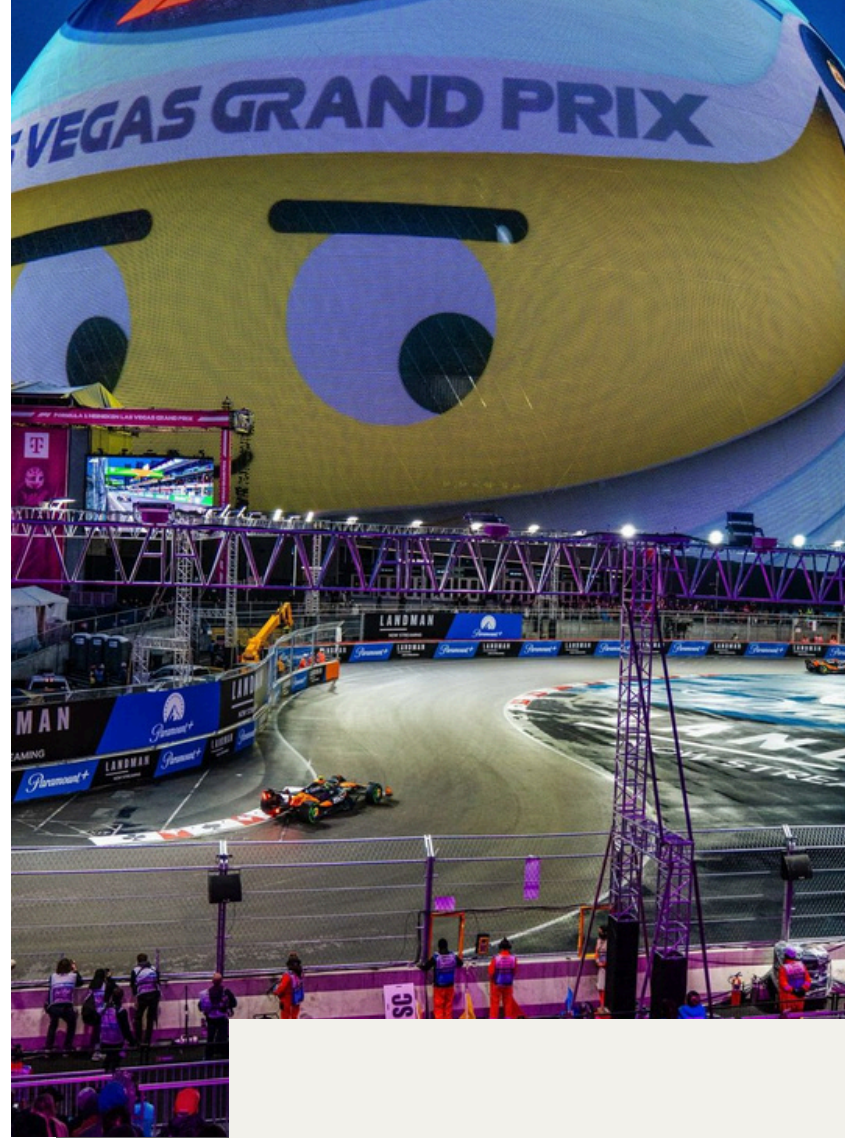
Add — Race calendar visual language — every campaign asset references the current or next Grand Prix weekend

Typography — Retain F1 official fonts for licensed IP; introduce a supporting 'community' typeface for program comms that feels slightly warmer and less corporate

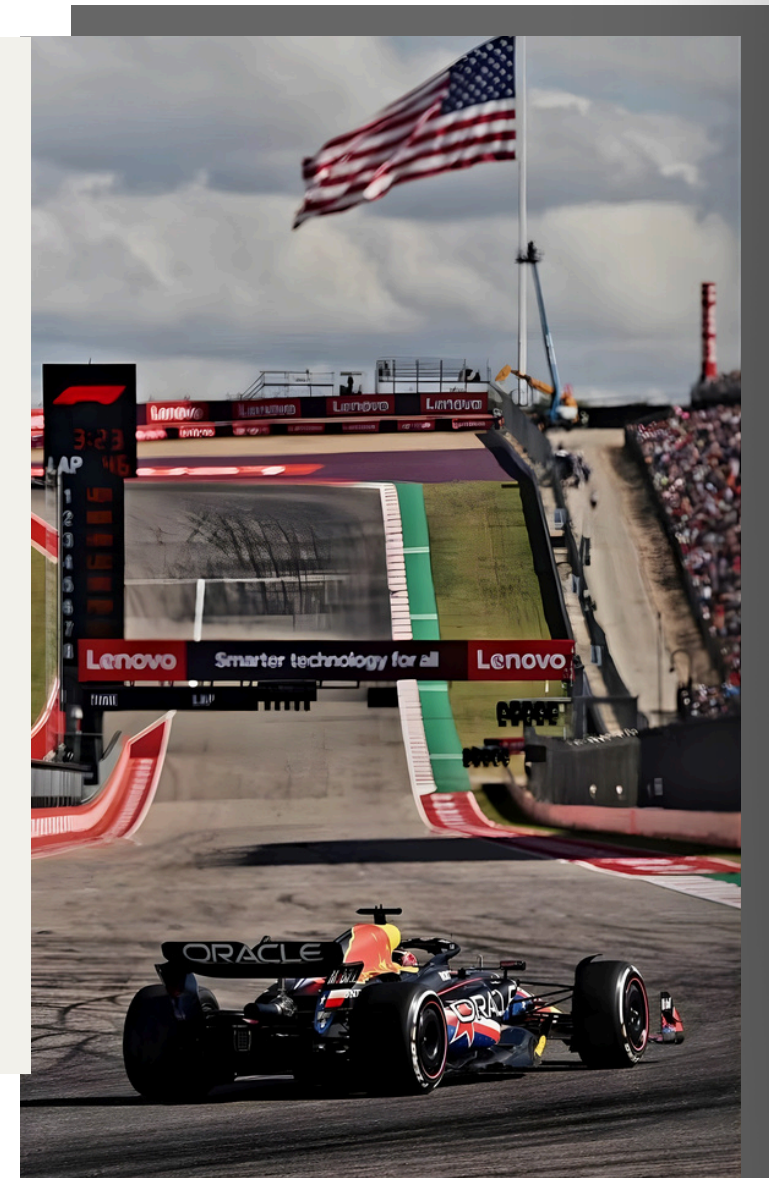
Photography — Shift emphasis from simulator-focused to fan-experience-focused — emotion of watching the race together, not just racing

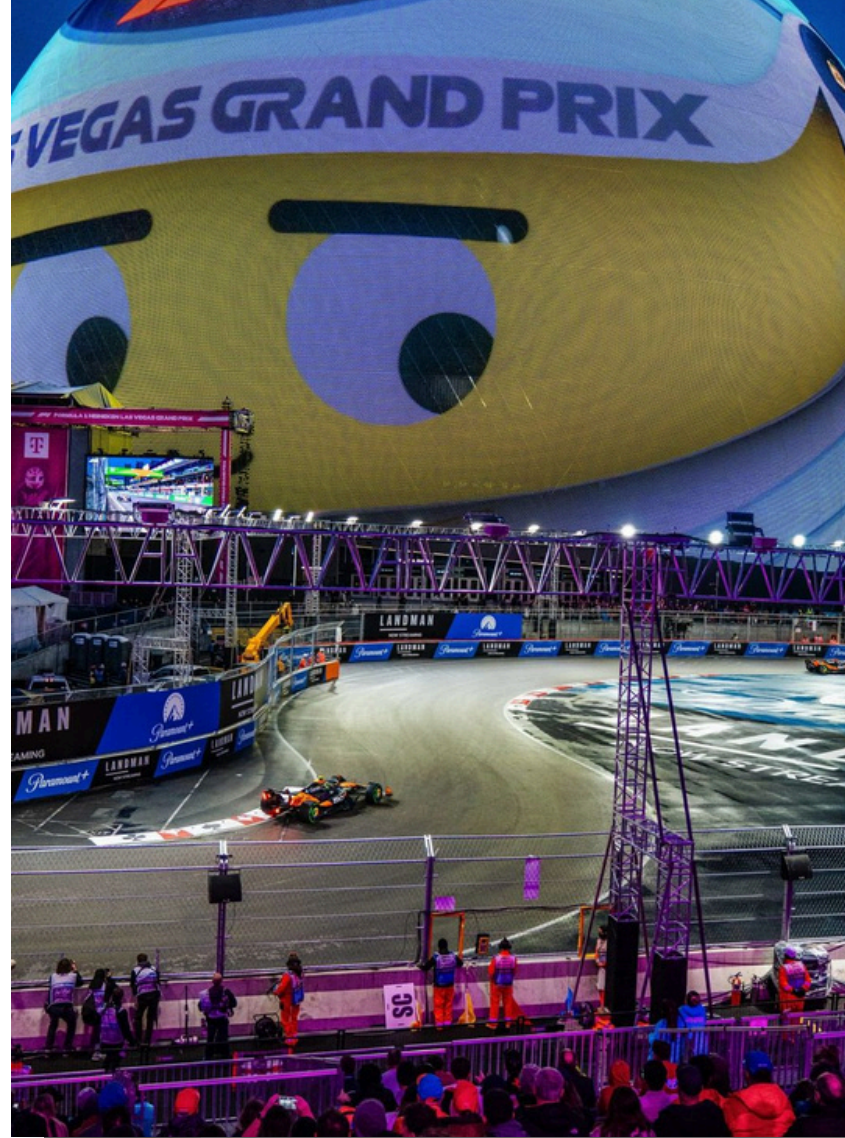
Campaign Look — Race weekend specific: each of the 24 Grand Prix becomes its own event identity — Japanese flag colors for Suzuka race night, Italian flag for Monza, etc.





THE RACE CALENDAR STRATEGY — 24 EVENTS, 24 CAMPAIGNS

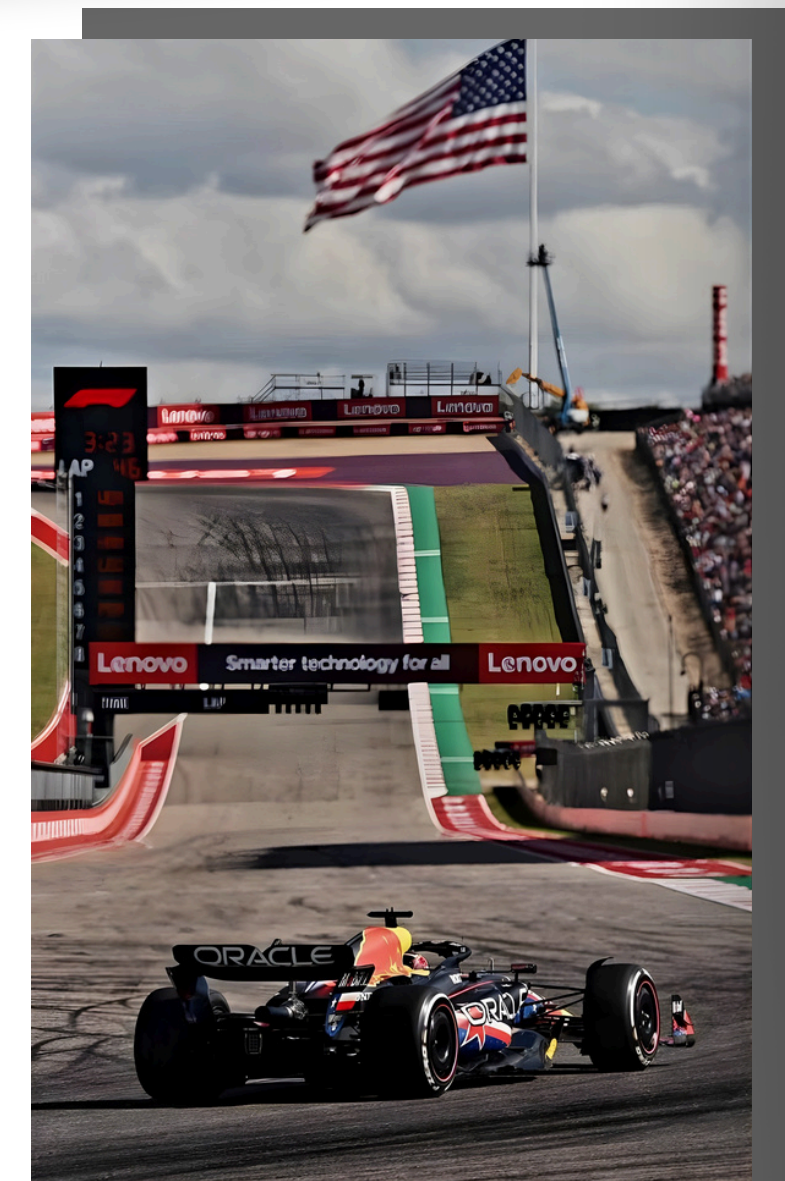


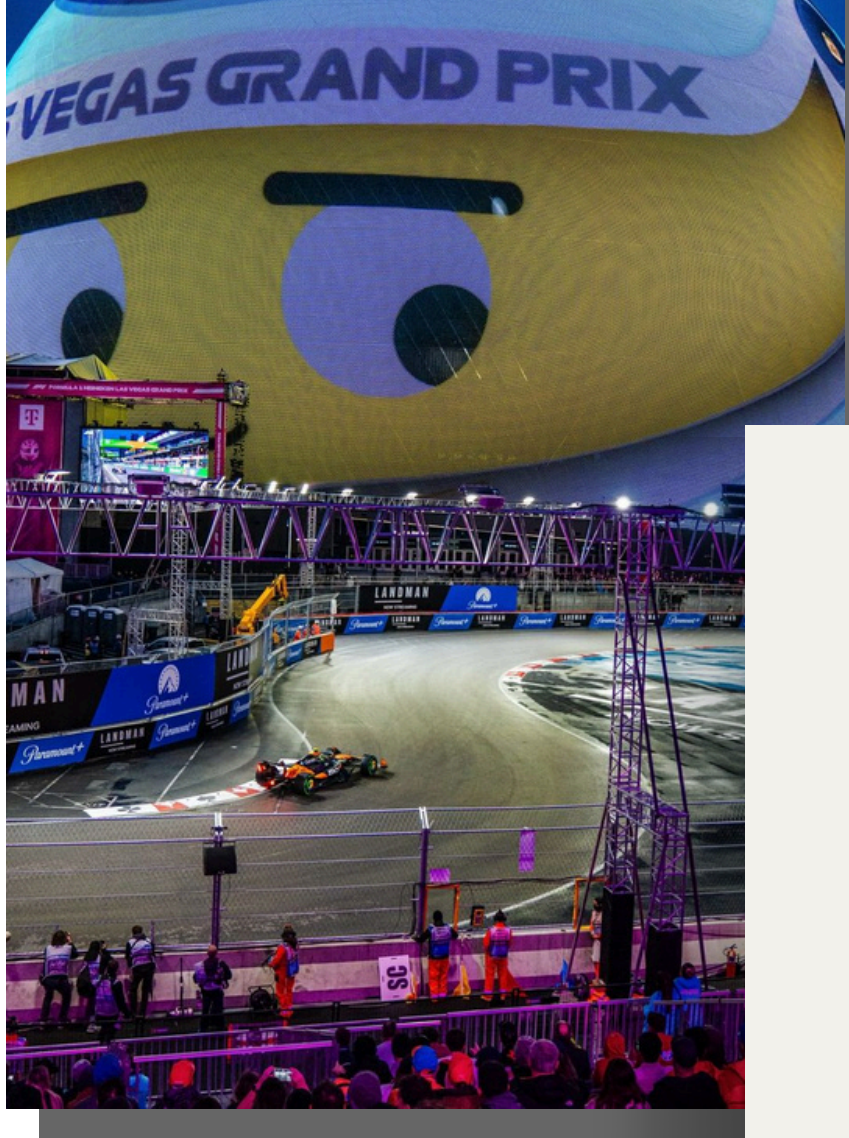


The F1 calendar is F1 Arcade's greatest underutilized marketing asset. Topgolf has no equivalent. Dave & Buster's has no equivalent. F1 Arcade has 24 automatic event occasions per year — a built-in content cadence that its competitors would pay to replicate.

The Core Strategic Innovation: Race Calendar Activation

The most significant gap in F1 Arcade's current marketing is the non-utilization of Formula 1's built-in content and event calendar. F1 races 24 weekends per year — every one of which is a pre-built reason for F1 fans to gather, watch, and spend. No other entertainment competitor has an equivalent marketing calendar handed to them by their sport. The revised strategy builds the entire marketing program around this calendar.





Race Night Event Program

Frequency — Every Formula 1 Grand Prix weekend (24 per season)

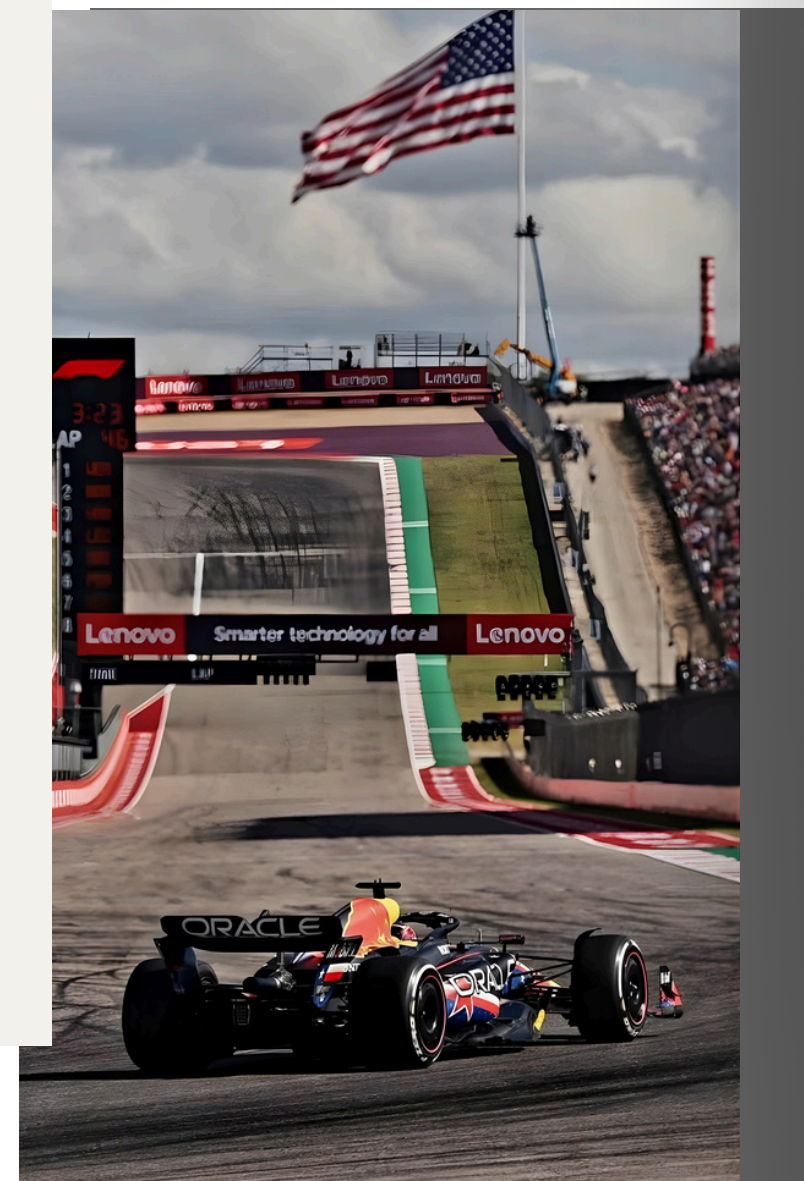
Format — Live race broadcast on all screens, reserved fan seating tiers, race-themed cocktail menu

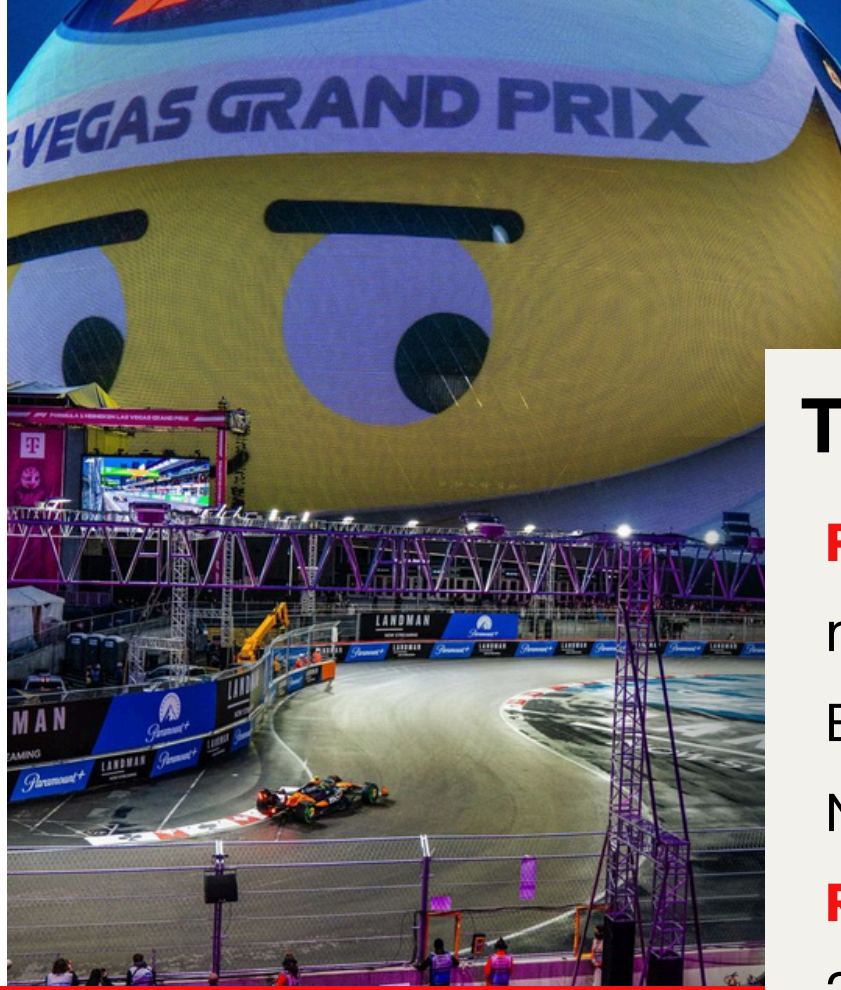
Grand Prix Menus — Each race weekend features a food and drink item inspired by the host country — Japanese GP: ramen-inspired, Italian GP: pasta special, etc.

Driver of the Day — Fan vote on venue screens during the race — winning vote gets a drink credit

Race Trivia — Qualifying night event Thursday/Friday — F1 trivia, prediction boards, driver lineups

Simulator Challenge — Race weekend leaderboard — top lap time on race weekend wins next race night free





The Race Night Loyalty Program: Race Pass

Program Name — Race Pass — the F1 Arcade season membership

Entry Tier (Free) — Register online, earn stamps for Race Night attendance, redeem for rewards

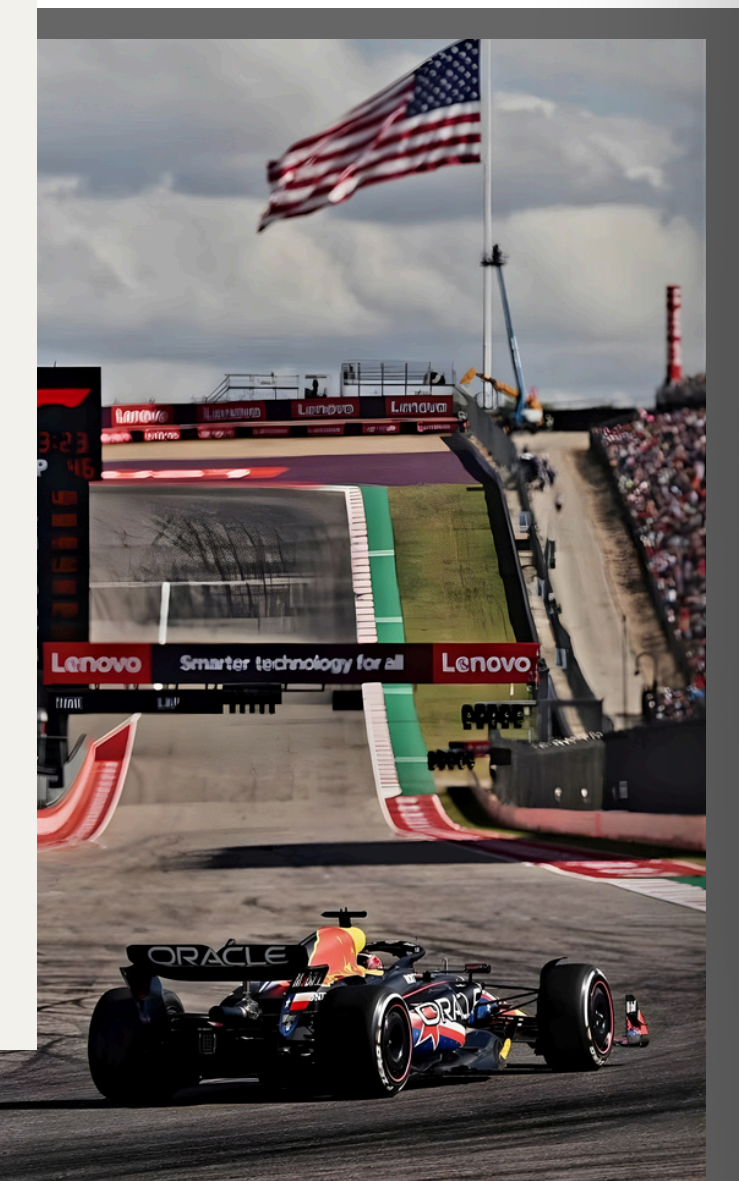
Race Pass Pro (\$24.99/mo) — Priority race night seating, 20% off food and drinks, monthly simulator credit, early access to events

Race Pass Champion (\$49.99/mo) — Reserved race night table every Grand Prix weekend, complimentary cocktail, name on the Race Board, exclusive access to Championship Night

Season Structure — Program follows the F1 season — start and end with the racing calendar, creating natural renewal moments

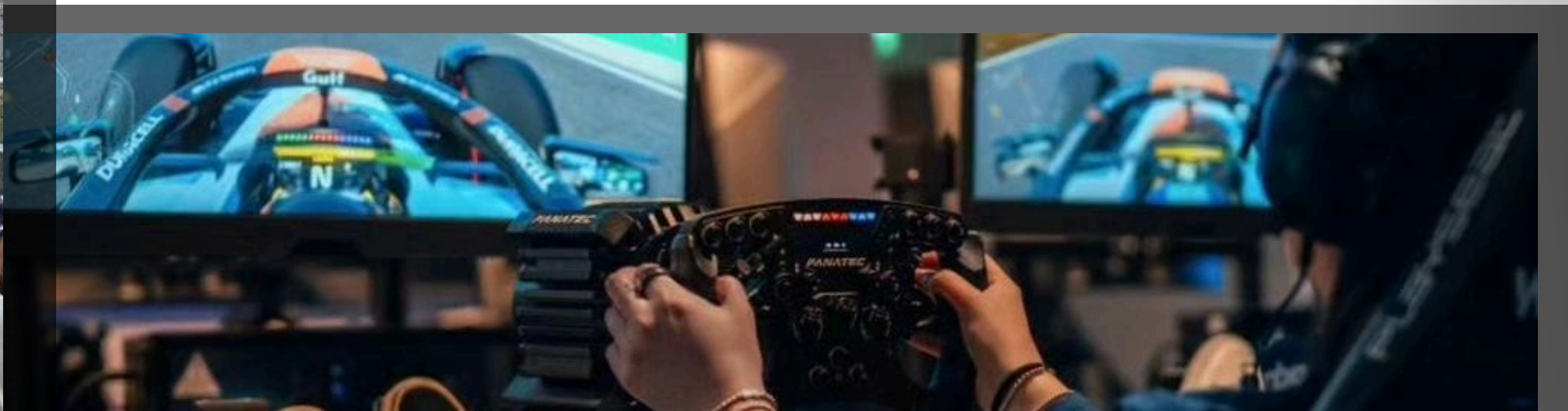
Championship Night — Season-ending event — Race Pass holders get priority access to the finale event; creates season-long anticipation

Why this works: Topgolf customers average 1.5 visits/year. Race Pass Pro members will visit 5–10 times/year minimum — attending every race night they can. This single program transforms the unit economics of the business.





NEW AUDIENCE ACTIVATION — COLLEGE & GEN Z STRATEGY





The Under-25 Opportunity

51M

New Under-35 F1 Fans
Globally in 2025 Alone

Marketing Week, March 2026

43%

F1 Global Fanbase
Under Age 35

Marketing Week, March 2026

53%

US Fans Who Cite Drive
to Survive as Entry Point

Morning Consult, 2022

F1 Arcade's current venue locations in Boston (near BU, Northeastern, MIT), Washington D.C. (near Georgetown, GW, American University), and Philadelphia (near Penn, Drexel, Temple) place it directly adjacent to some of America's largest student populations. None of these markets have a documented campus outreach program. This is the most significant untapped audience adjacent to existing infrastructure.

Campus Activation Program



- **Campus Ambassador Program:** one to two paid student ambassadors per venue city — organize watch party groups for race nights, distribute Race Pass trial codes, host simulator challenge events on campus
- **Student Race Pass Tier:** Race Pass Lite at \$9.99/month for verified students — lower barrier to trial, builds the habit before the price-sensitive years end
- **Move-in Week Activation:** set up a pop-up simulator at nearby campus orientation events in August — free trial with Race Pass sign-up QR code
- **Greek Life and Club Sports Partnership:** partner with fraternities, sports clubs, and student orgs for private venue bookings on race weekends — student group pricing to drive bulk bookings
- **Semester Championship:** campus-level simulator leaderboard across the academic year — top student at each campus wins a Championship Night VIP pass and a Race Pass Pro semester





REVISED GEOGRAPHY STRATEGY — CLOSE THE GRAND PRIX GAP



The Missing Markets Problem

440K

Austin COTA Grand Prix
Attendance (2024)

Liberty Media

270K

Miami Grand Prix
Attendance (2024)

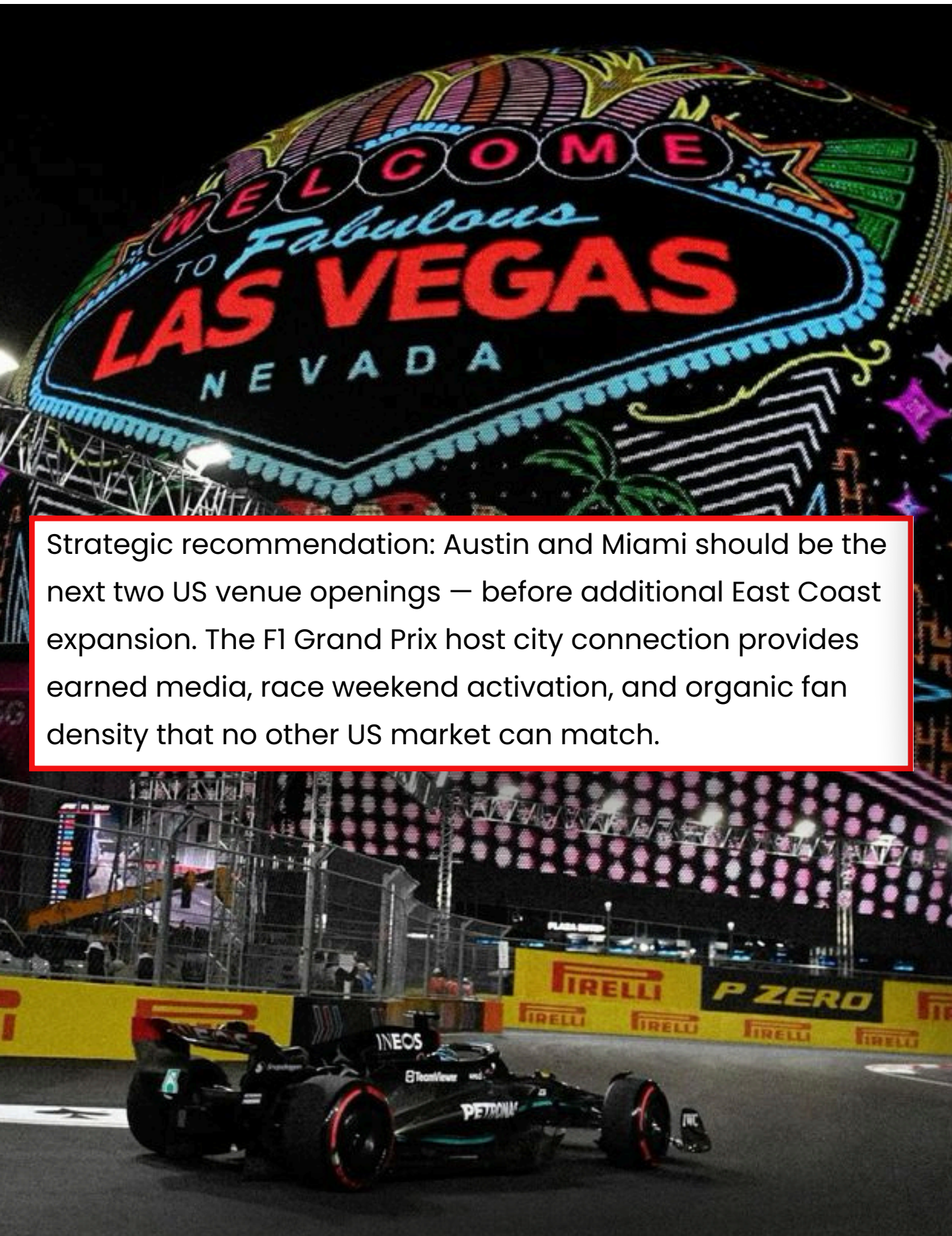
Liberty Media

\$480M

COTA Economic Impact
per Race Weekend

Austin Chamber of Commerce

Austin and Miami are the two most F1-engaged cities in the United States by attendance and market research. Both have large 18–35 demographics, strong sports culture, active nightlife and entertainment districts, and a documented appetite for F1 fandom at scale. Neither has an F1 Arcade location as of 2025. This is the most immediately actionable geographic gap in the current strategy.



Strategic recommendation: Austin and Miami should be the next two US venue openings — before additional East Coast expansion. The F1 Grand Prix host city connection provides earned media, race weekend activation, and organic fan density that no other US market can match.

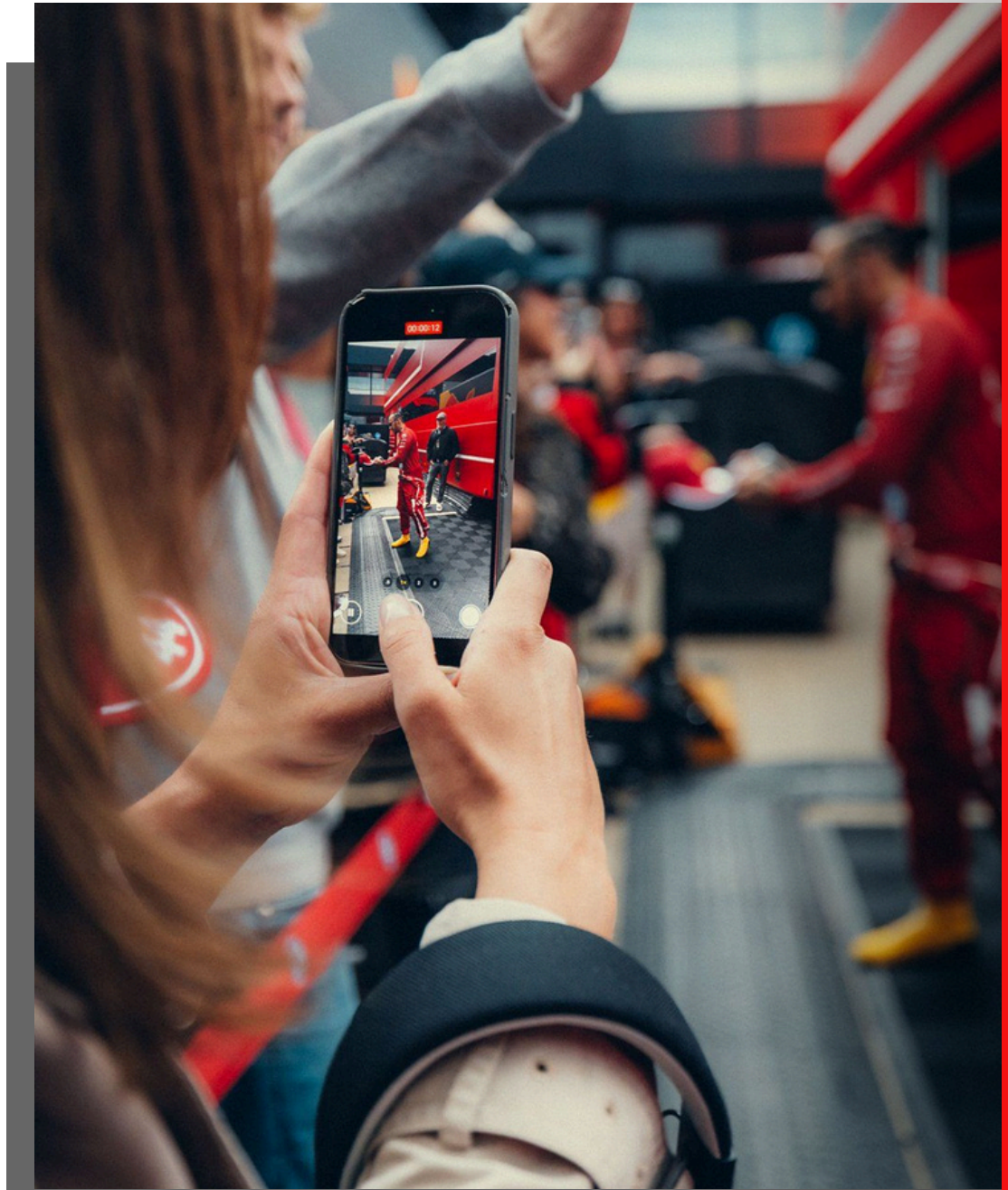
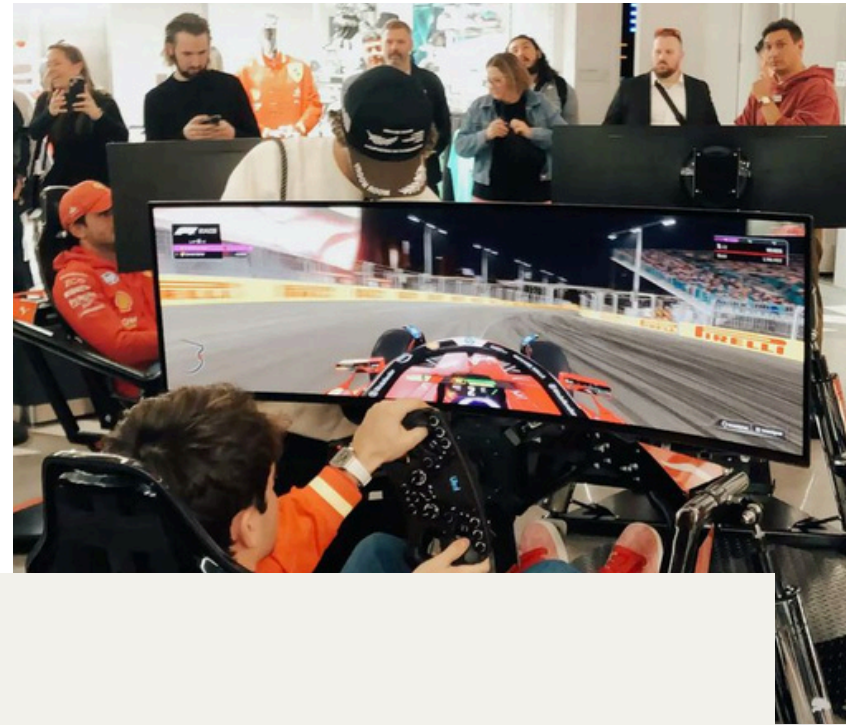
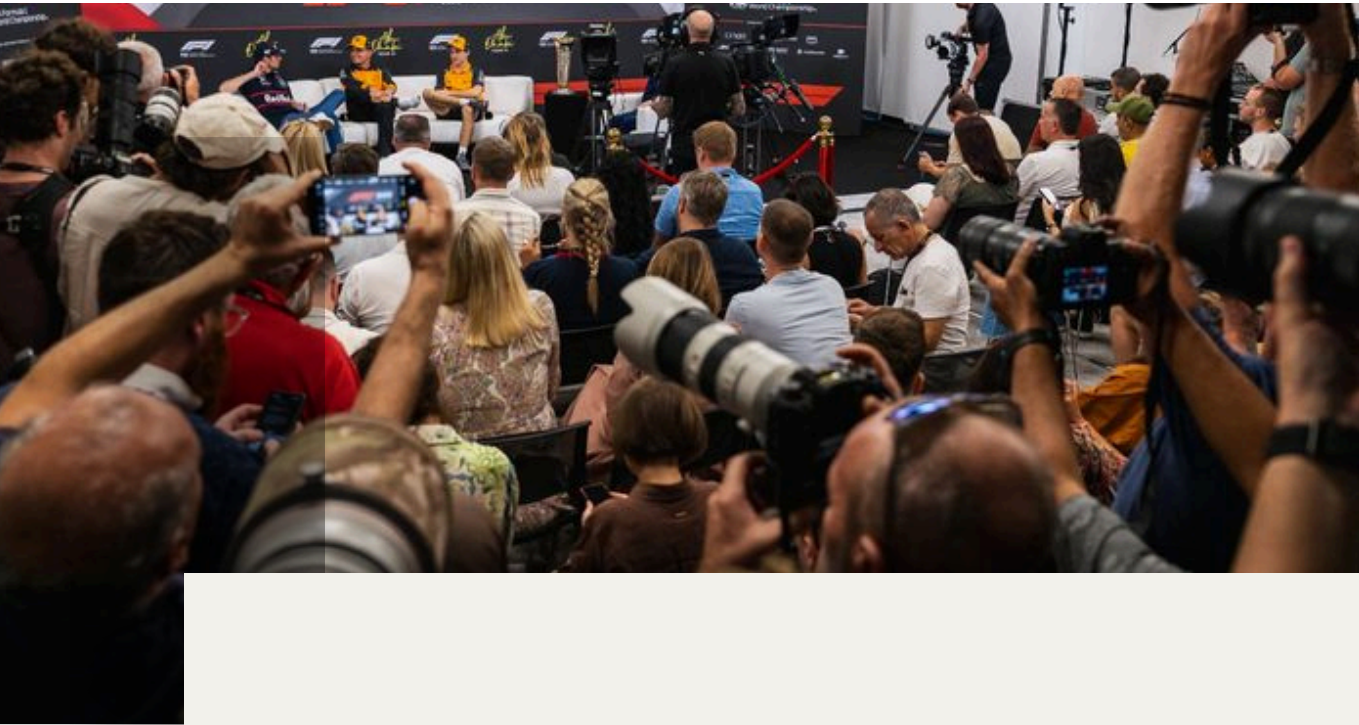
The Missing Markets Problem

Austin Priority — Circuit of the Americas hosts 430,000–440,000 fans annually; University of Texas with 50,000+ students; strong tech and young professional demographic; F1 Grand Prix ties create annual 'home race' moment

Miami Priority — Formula 1's fastest-growing US market in social media engagement; high-income coastal demographic; international tourist mix aligns with F1's global brand; Wynwood arts district as ideal venue location

Nashville (New) — Confirmed F1 street circuit from 2026 — early venue presence before race launches creates brand equity and race-adjacent marketing opportunity

Charlotte — Large college student population, dense sports fan culture, NASCAR adjacent market — crossover motorsport audience opportunity



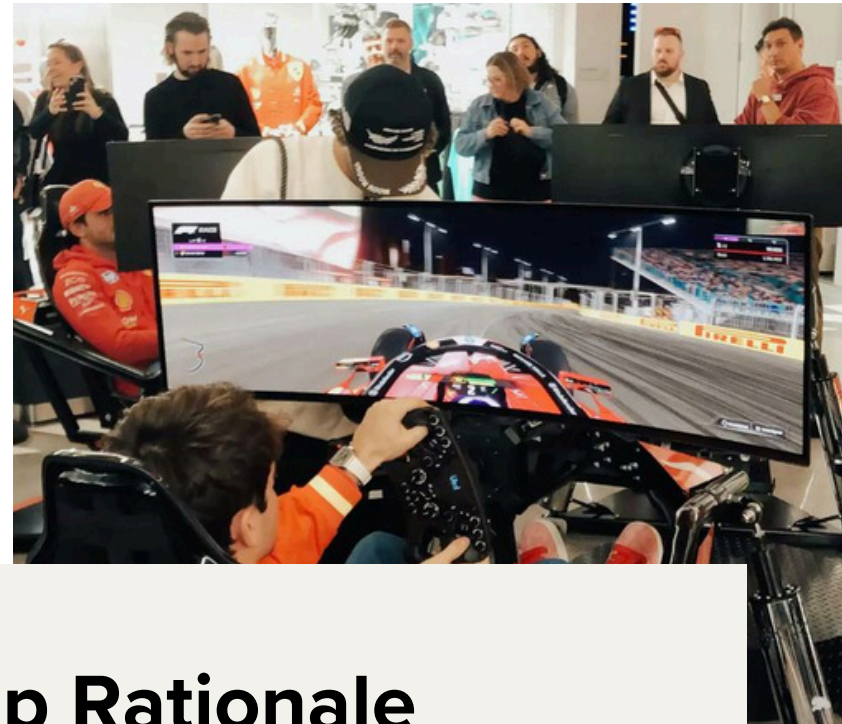
REVISED CHANNEL & MEDIA STRATEGY

Revised Channel Breakdown

Branding Redesign — 2026



Channel	Revised Role	Allocation Shift
Race Night Event Marketing	Primary — every Grand Prix weekend is a campaign event; owned email, social, SMS to Race Pass members	INCREASE — this is the primary recurring revenue driver
TikTok (Fan-First Content)	Race reactions, simulator challenges, race night atmosphere — target 18–28 F1 fan content consumers	INCREASE — current use is underdeveloped vs. the F1 parent brand's 15M follower strategy
Instagram	Venue lifestyle, race night recaps, Grand Prix menu reveals, Race Pass benefit showcases	MAINTAIN with improved calendar structure
Campus Ambassador Program	On-campus activation — Race Pass trial distribution, student event bookings, semester championship	NEW — not currently present in strategy
F1 Parent Brand Co-Marketing	Race weekend co-posts, F1 official channel tags, Paddock Club cross-promotion	INCREASE — leverage existing relationship more aggressively
Google Ads (Local Search)	'F1 watch party [city]', 'race night [city]', 'F1 fan bar near me' — high-intent race weekend searches	NEW — currently no documented paid search presence
Podcast Sponsorships	WTF1, Beyond the Grid, F1 Nation — direct access to the passionate F1 fan segment	NEW — high-intent audience with no venue equivalent
Corporate B2B (Retain)	Dedicated sales team and event packages — maintained as high-margin revenue stream, not acquisition primary	MAINTAIN but de-prioritize in consumer marketing mix



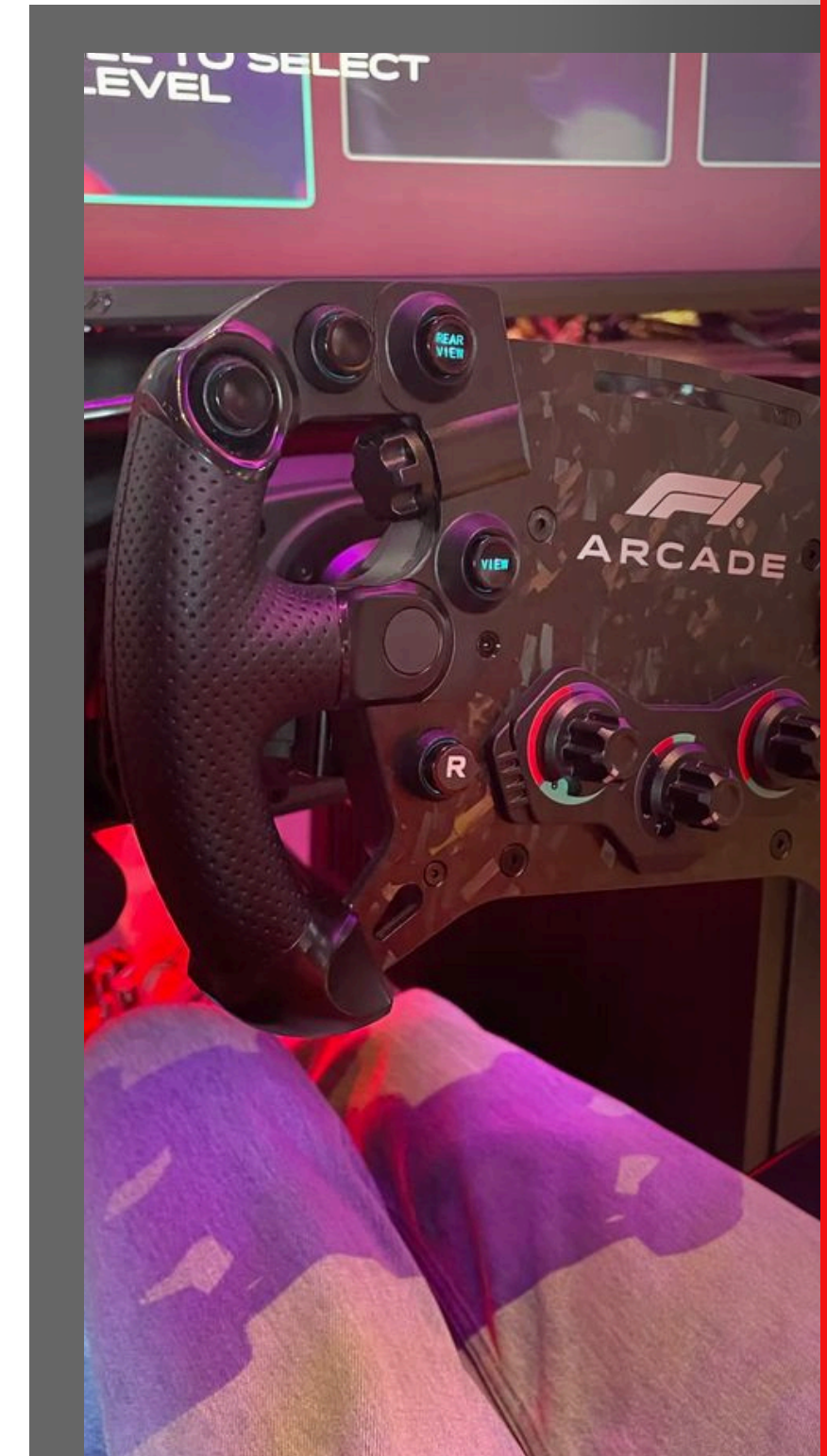
New Channel: F1 Podcast Sponsorship Rationale

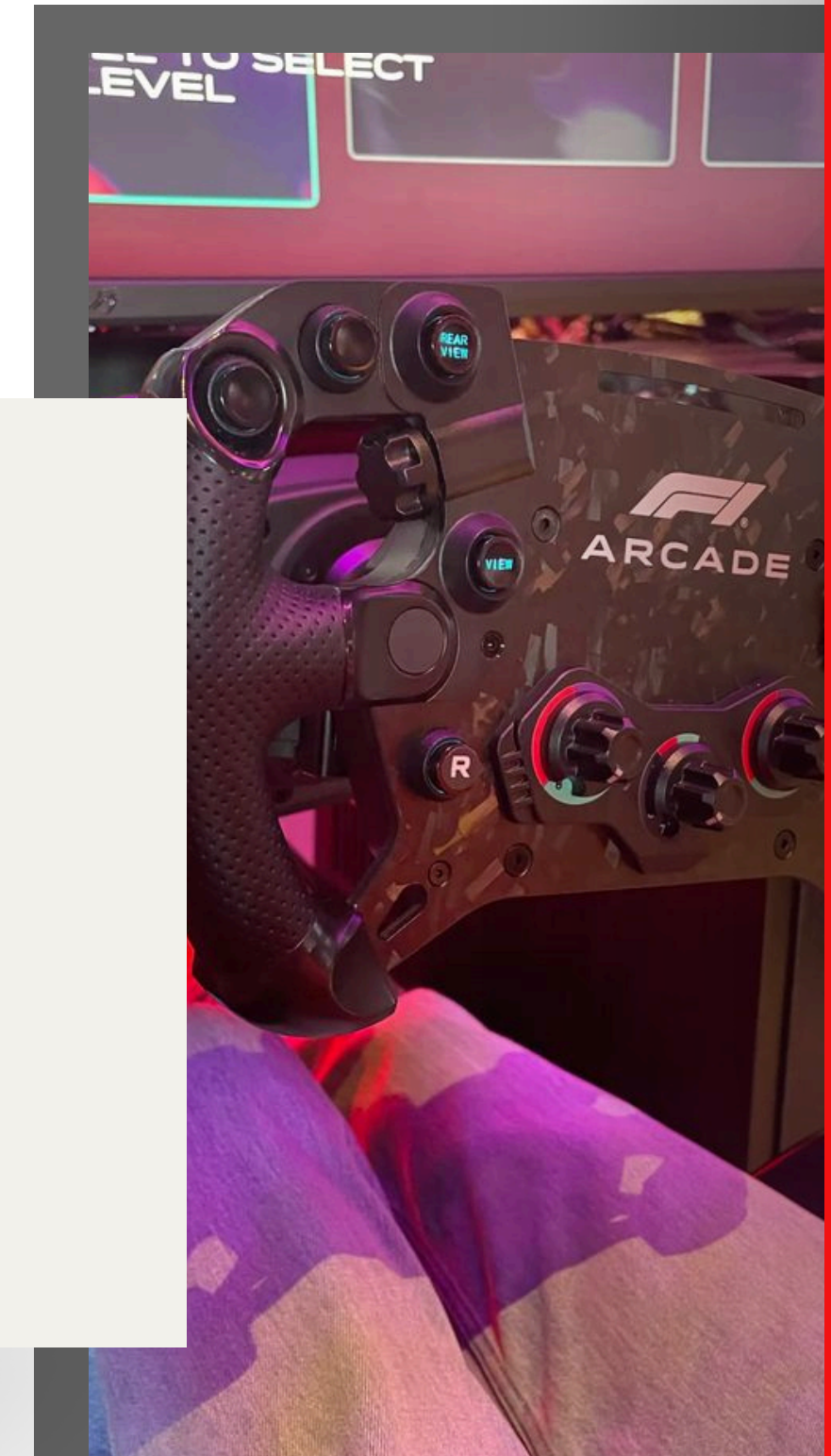
The F1 podcast ecosystem represents one of the highest-concentration audiences of passionate F1 fans available anywhere in media. WTF1, the largest English-language F1 podcast and YouTube channel, has over 4 million YouTube subscribers and 2 million podcast listeners. Beyond the Grid (the official F1 podcast) and F1 Nation reach dedicated fans who listen regularly throughout the season — the exact Race Pass target demographic. A sponsorship in any of these properties places F1 Arcade directly in front of its highest-value repeat-visitor segment for a fraction of the cost of broad paid social.





TESTING FRAMEWORK — KEY EXPERIMENTS TO VALIDATE THE STRATEGY





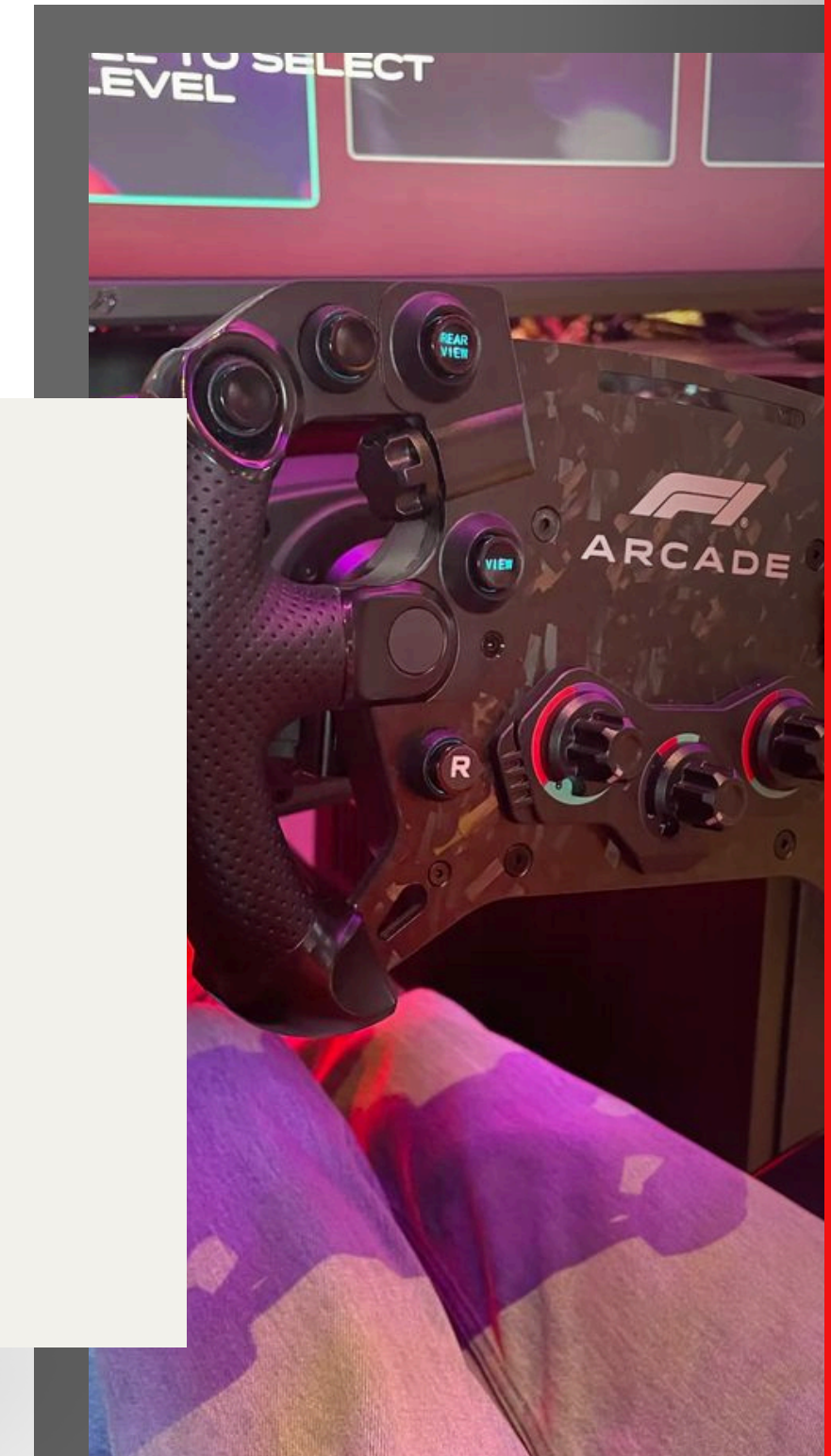
Experiment 1: Race Night vs. General Event Marketing

Version A — Race calendar-anchored marketing: every paid social post references a specific upcoming Grand Prix race night

Version B — General venue marketing: lifestyle and simulator-focused content with no race calendar tie-in

Measure — Race Night attendance, repeat visit rate within 30 days, Race Pass sign-up rate

Hypothesis — Version A will drive significantly higher repeat visit rate because it gives fans a specific recurring reason to return



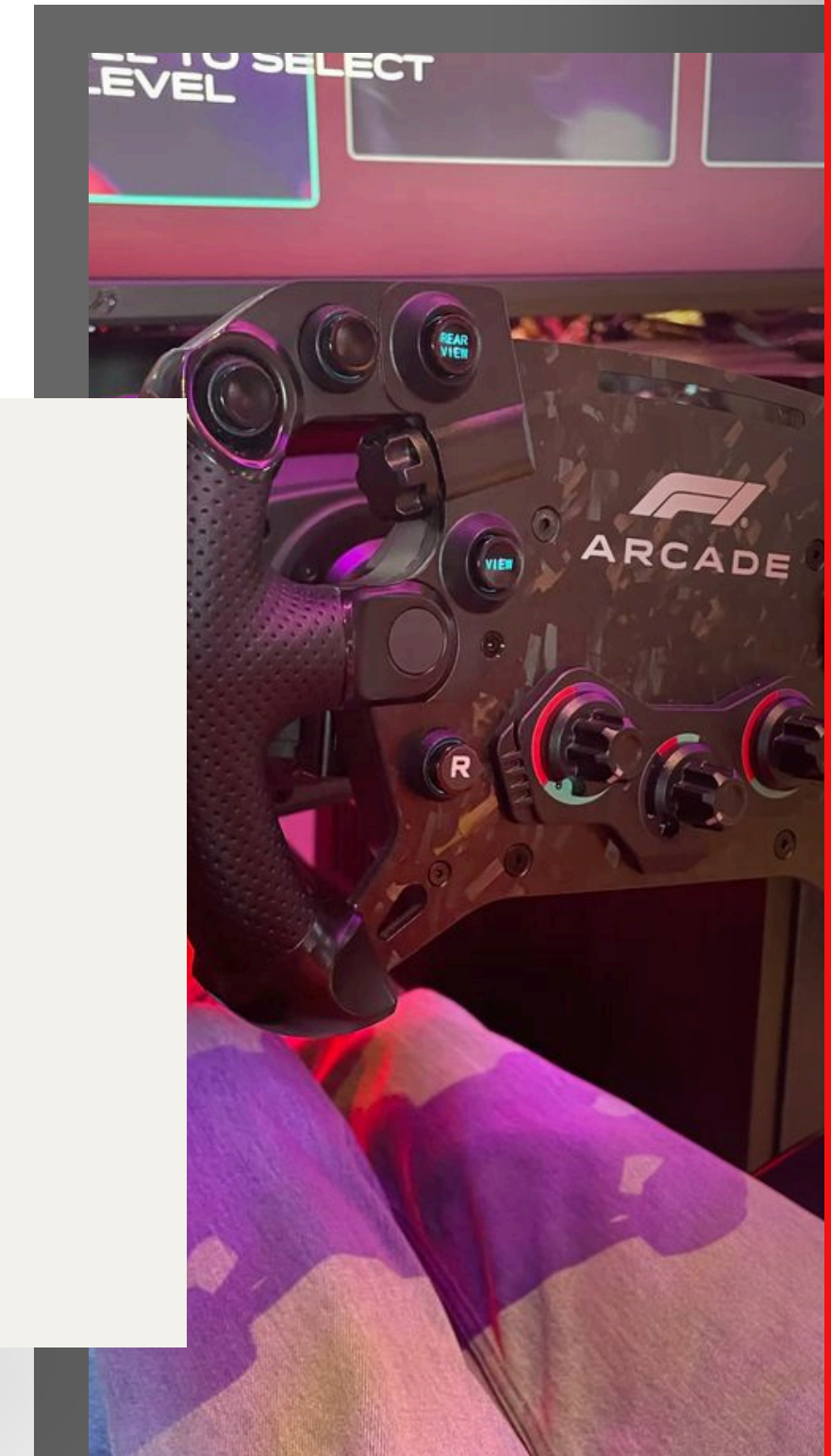
Experiment 2: Race Pass Pricing Tier

Version A — Race Pass Pro at \$24.99/month — mid-tier with seating priority and food discount

Version B — Race Pass Lite at \$9.99/month (student/entry tier) — lower conversion barrier

Measure — Sign-up rate, average monthly visits, food/drink spend per visit, 6-month retention

Hypothesis — Version B will drive higher volume sign-ups; Version A will drive higher per-head revenue. Testing determines which produces better lifetime value.



Experiment 3: Campus vs. General Social Acquisition

Version A — Campus-targeted paid social: ads served to college-aged users within 5km of each venue city university

Version B — General 21–35 demographic targeting: no campus focus, broader interest targeting

Measure — Cost per Race Pass sign-up, D30 retention, visit frequency in first 90 days

Hypothesis — Version A will produce lower CPL and higher visit frequency — students in adjacent cities are geographically convenient and socially motivated for group outings



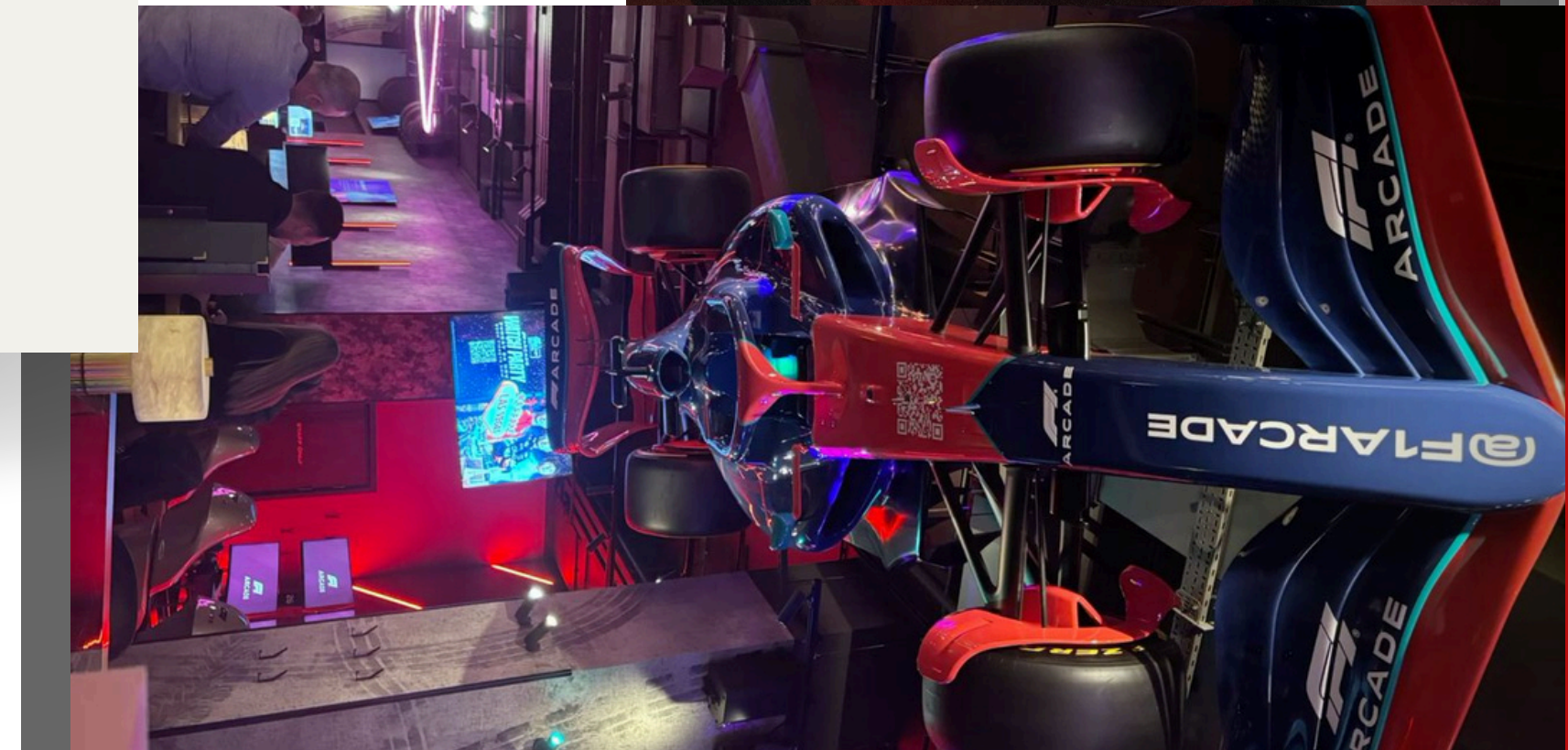
REVISED KPIs & SUCCESS METRICS





The Defining Metric: Visit Frequency

The single most important metric for F1 Arcade's long-term success is visits per customer per year. Topgolf averages 1.5. The 3+ threshold is required for sustainable entertainment unit economics. The revised strategy's entire architecture — Race Pass, Race Night events, campus activation, podcast sponsorship — is designed to push this number above 4.





Year 1 KPIs (Per Venue)

Metric	Target	Why It Matters
Average Annual Visits Per Active Customer	4.0+	The fundamental unit economics driver — above Topgolf benchmark (1.5)
Race Pass Pro Memberships	500 per venue by Season End	Recurring revenue base; high-frequency visitors
Race Night Average Attendance	70%+ capacity per race weekend	Validates event program effectiveness
Corporate Event Bookings	50+ per venue annually	High-margin revenue anchor maintained
Race Pass Student Sign-ups	200 per venue city per semester	Validates campus acquisition strategy
NPS Score	68+	Sector-leading satisfaction (industry average ~55)



Brand Growth KPIs

Metric	Target	Timeframe
TikTok Following (F1 Arcade US)	100,000 by mid-season	Organic fan community growth
Race Pass Total Members	5,000 nationally by end of Season 1	Loyalty program adoption
Austin + Miami Location Announcement	Confirmed by Q2 2026	Geographic gap closure
Podcast Sponsorship Reach	5M+ impressions across F1 podcast ecosystem in Season 1	High-intent audience acquisition
Campus Program Coverage	Active program at 5+ universities by September 2026	Gen Z acquisition pipeline



SIDE-BY-SIDE STRATEGY COMPARISON



Current vs. Revised — Key Differences



Dimension	Current Strategy	Revised Strategy
Mission	Bring F1 to the masses — accessibility-first	Be the home of F1 fandom — fan-community first
Core Audience	Everyone — 50/50 male/female, broad demographic	F1 fans 18–34 as primary; college segment new; corporates retained
Repeat Visit Model	First-time visitor driven — event and PR launch focused	Race Calendar structured — 24 activation events per year
Loyalty	Not documented in current public marketing	Race Pass program — 3 tiers including student pricing
Key Channel Gap	No campus program; no podcast sponsorship; no race calendar content cadence	Campus ambassadors; podcast sponsorships; race weekend paid search added
Geography	Boston, D.C., Philly, Denver, LV, Atlanta	Add Austin + Miami as priority — largest F1-fan density in US
Competitive Risk	Novelty trap — Topgolf trajectory risk	Frequency-building solves the novelty trap structurally
Brand Identity	Accessible experience for all — 'F1 for everyone'	Fan community home — 'Race Night, Every Race Night'

The shift is not about excluding audiences — it is about building depth before breadth. A venue that the hardest-core F1 fan considers their race weekend home will always attract casual visitors. A venue that only targets casual visitors will never build the repeat frequency it needs to survive long-term.



Thank You

