



The **2026** F1 Sponsorship Cost & ROI Benchmark.

Confirmed deal values, tier pricing, ROI benchmarks and a decision framework for senior buyers evaluating Formula 1 in 2026.

PREPARED FOR

CMOS · CCOS · HEADS OF BRAND & PARTNERSHIPS · BOARD-LEVEL DECISION-MAKERS

\$3B

2026 F1 sponsorship
market

+15%

YoY growth, 2025 →
2026

\$110M

Largest confirmed title
deal

6

Confirmed title
sponsors

8

Factors that move
pricing

1

Cadillac case study

EXECUTIVE SUMMARY

A structurally different commercial era.

F1 has entered a structurally different commercial era driven by the **2026 regulation reset**, accelerating **US market growth**, and the **\$135M cost cap**. These forces have pushed title deals to record values while compressing inventory at the top of the grid.

THE BOTTOM LINE

F1 sponsorship in 2026 spans a wider range than ever — from \$500K single-race placements to \$110M+ title rights. The question is no longer **how much**, but **what tier, which team, and what activation**.

01 The market is now \$3B

Ampere Analysis reports total F1 sponsorship investment will rise **15% YoY** in 2026, from \$2.5B in 2025 to over \$3B.

02 The top of the grid is consolidating

Oracle/Red Bull (\$110M), HP/Ferrari (\$100M) and Mastercard/McLaren (\$90M) now anchor the top three title deals — a 40–60% inflation in four years.

03 The US is the fastest-growing market

US-based sponsorship investment is up **68%** since 2023; ESPN race viewership up **135%** since 2018.

04 The cost cap is the structural driver

The \$135M operational cost cap means sponsorship revenue is the primary unconstrained growth lever for teams, pushing premium inventory pricing upward.

05 ROI requires activation

Historical data suggests only **~10%** of F1 deals deliver positive media-value ROI without significant activation spend layered on top.

THE 2026 MARKET

Market snapshot.

Six macro indicators every sponsorship buyer should reference before evaluating an F1 deal.

<p>\$3B+</p> <p>Total F1 sponsorship investment in 2026.</p>	<p>+15%</p> <p>YoY market growth, 2025 → 2026.</p>	<p>827M</p> <p>Global F1 fanbase (2025 season data).</p>
<p>+68%</p> <p>US sponsorship spend growth since 2023.</p>	<p>1.3M</p> <p>Average US race viewers (ESPN, 2025).</p>	<p>43%</p> <p>F1 fans under 35 — and growing.</p>

FORCE 01

Demand is outpacing inventory.

Only 11 teams in 2026, finite premium placements, demand growing 15% annually — top-tier pricing has only one direction to move.

FORCE 02

Audience is younger and more digital.

57% of new 2025 F1 fans were under 35; 54% of TikTok followers under 25. The conversation shifts from impressions to engagement.

FORCE 03

US is now a strategic priority.

Three US Grands Prix (Miami, Austin, Las Vegas), the Cadillac entry and Liberty Media ownership have made the US the most aggressive expansion market.

Sources: Ampere Analysis (Feb 2026) · Formula 1 2025 season data · ESPN viewership data · RTR Sports Marketing analysis.

2026 F1 SPONSORSHIP COST MATRIX

The cost matrix.

Pricing benchmarks across all six commercial tiers — from naming rights to single-race placements.

TIER	ANNUAL COST	WHAT YOU GET	2026 EXAMPLE
Title Sponsor Naming rights	\$25M – \$110M+	Team name + full livery + category exclusivity + global marketing rights.	Oracle / Red Bull \$110M/yr — record deal
Major Sponsor	\$5M – \$25M	Premium car placement (sidepod, rear wing, halo); no naming rights.	Aramco / Aston Martin ~\$75M — premium tier
Associate / Minor	\$1M – \$5M	Secondary car panel + suit branding + marketing rights.	Mid-grid placements Across most teams
Entry-Level	\$500K – \$1M	Small logo + use of team IP in marketing communications.	Backmarker starter packages Stake F1, Haas tiers
Single-Race	\$500K – \$800K	Race-weekend-only branding; activation-heavy.	Regional / launch activations Per Grand Prix
Driver Personal	\$250K – \$3M	Helmet, suit, gloves + driver social channels + appearances.	Variable by driver Top-tier drivers premium

Title-tier example reflects the Oracle/Red Bull extension reported by RacingNews365 in March 2026 — narrowly ahead of HP/Ferrari at \$100M.

SIX CONFIRMED TITLE DEALS

What the world's largest brands pay to anchor a team.

\$110M /yr	Oracle	Red Bull Racing	Q1 2026 extension. Cloud infrastructure, race-simulation tools, data analytics. Naming rights + cloud category exclusivity.
\$100M /yr	HP	Scuderia Ferrari	Multi-year title. Computing infrastructure + consumer co-branding rights, prominent chassis and digital placement.
\$90M /yr	Mastercard	McLaren Racing	New 2026 title. Largest financial-services sponsorship in F1 to date; category exclusivity and extensive fan-engagement rights.
~\$80M /yr	Petronas	Mercedes-AMG	Long-standing technical and fuel partnership. Performance-integrated benchmark for the sport.
~\$75M /yr	Revolut	Audi F1 Team	Headline title secured ahead of Audi's full grid entry. Reflects fintech's accelerating presence in motorsport.
~\$75M /yr	Aramco	Aston Martin	Energy partnership extension. Saudi Arabia motorsport footprint. Includes a rare 10% equity option for Aramco.

Annual contract values, publicly reported or estimated. The tilde (~) flags industry estimates. Sources: RacingNews365 · Yahoo Sports / Athlon Sports · Ampere Analysis · TheStreet (Feb–March 2026).

CASE STUDY

Building a stack from zero: Cadillac.

Cadillac's 2026 entry to Formula 1 is the most instructive sponsorship case study of the decade.

As a US-headquartered OEM (General Motors) building a commercial stack from a blank sheet, Cadillac offers a real-time view of how a new entrant structures pricing across all sponsorship tiers — and what realistic targets look like in the 2026 market.

Title sponsor	~\$70M	1 partner (target)
Premium partners	\$40–50M	2–3 partners · each
Secondary partners	up to \$30M	3–5 partners · each
Official team partners	\$3–15M	~8 partners · each
Technical suppliers	\$500K+	Multiple

The 5-layer Cadillac structure. Targets reflect 2026 entry-market pricing.

Lesson 01

Title isn't the only way in.

Plan B — 2–3 premium partners at \$40–50M each — is increasingly the model when a title sponsor proves elusive.

Lesson 02

New entrants discount to acquire.

Target values are 30–40% below comparable placements on incumbent top-3 teams. Better value for brand-risk takers.

Lesson 03

Brand-fit before deal value.

Confirmed: Jim Beam, Tommy Hilfiger. Lifestyle brands — a deliberate departure from tech-and-energy dominance at the top.

THE 8 FACTORS THAT DETERMINE PRICE

What actually moves the number on an invoice.

<p>01 Team competitive standing</p> <p>Top-3 teams command 3–5× the rate of backmarkers for equivalent placements. A sidepod on Red Bull is a different product than a sidepod on Williams.</p>	<p>02 Car placement position</p> <p>Front wing, sidepod, halo, rear wing, engine cover and nose cone each have distinct CPMs. Front-of-car premium is typically 2–3× rear.</p>	<p>03 Category exclusivity</p> <p>Locking out competitors in your vertical adds 20–40% to the deal value but materially increases strategic value to the sponsor.</p>	<p>04 Activation rights included</p> <p>Driver appearances, hospitality, paddock club rights, content production and IP usage all carry separate line-item value. A bare logo is significantly cheaper.</p>
<p>05 Season length</p> <p>Full-season deals are most cost-efficient per race. Partial-season and single-race deals carry a 15–30% per-weekend premium.</p>	<p>06 Driver image rights</p> <p>If you want the driver in your marketing campaigns, expect a separate fee structure on top of the team deal — particularly for top-tier drivers.</p>	<p>07 Hospitality & paddock access</p> <p>Paddock Club, garage tours and VIP race-weekend programmes are priced separately from logo placement. For B2B brands, this is often where the ROI sits.</p>	<p>08 Geographic market focus</p> <p>US-only, EU, APAC or Middle East activation rights are increasingly packaged separately. Global rights pay materially more than single-market.</p>

ROI BENCHMARKS

What brands actually get.

Industry-standard valuation tools — [Relo Metrics](#), [Nielsen Sports](#), [GumGum](#) — calculate F1 sponsor media value via TV exposure, social media reach, digital impressions and ad-equivalency rates. The directional benchmarks at right are the most-cited figures in 2025–2026 deal evaluations.

THE ACTIVATION PRINCIPLE

Sponsorship without activation is a logo on a car. With activation, it's a brand campaign with an F1 backbone. Rule-of-thumb: plan to spend **0.5x–1.5x** deal value on activation.

Mid-tier deal media value	3–5x
A \$5M sponsorship typically yields \$15–25M in media value across a season.	
Total H1 2025 sponsor media value	\$665M
Across all teams and races, measured by Relo Metrics.	
Single-race media value (peak)	\$41M
2025 Australian GP delivered \$41M / 23B impressions.	
Global per-season TV reach	1.5B+
Linear TV, streaming and broadcast partners across 180+ countries.	
Fan brand recall vs other sports	2–3x
F1 fans recall sponsoring brands 2–3x more than fans of typical other sports.	
Deals achieving positive ROI	~10%
Historical — only with strong activation. Activation matters more than headline deal value.	

F1 VS MOTOGP VS INDYCAR VS FORMULA E

F1 is not always the right answer.

Cross-series comparison for portfolio-minded sponsorship buyers.

	ENTRY	MID-TIER	TOP-TIER	REACH
Formula 1 PREMIUM GLOBAL · TECH · FINANCE	\$500K–\$1M	\$5M–\$25M	\$25M–\$110M+	1.5B+
MotoGP EUROPEAN & ASIAN · FASHION · LIFESTYLE	\$250K–\$1M	\$1M–\$5M	\$5M–\$15M	~400M
IndyCar US-ONLY B2C · AUTOMOTIVE	\$500K–\$2M	\$2M–\$5M	\$5M–\$10M	US-anchored
Formula E SUSTAINABILITY · URBAN · EV	\$500K–\$2M	\$2M–\$5M	\$5M–\$10M	~300M

F1 wins on scale.

If your brand needs maximum global reach and luxury association, F1 is unmatched. The premium is justified for the right brand-fit.

MotoGP is the value play.

Delivers 70–80% of audience reach at 20–30% of cost. For European and Asian markets specifically, often the more rational portfolio choice.

IndyCar is the US specialist.

For brands focused exclusively on the US market, IndyCar's audience overlap is strong and CPM is materially better.

Formula E is the ESG play.

For brands with explicit ESG or EV positioning, Formula E's narrative fit may outweigh its smaller audience.

DECISION FRAMEWORK

Seven questions to answer before issuing an RFP.

01 What is your global brand objective?

If your goal is US-only growth, F1 is likely overpriced. If it's global luxury association or B2B prestige, F1 is uniquely well-positioned.

02 What is your activation budget?

Plan 0.5–1.5× deal value on activation. If activation isn't in your plan, the sponsorship will underperform regardless of placement.

03 What is your category exclusivity priority?

If locking competitors out of your vertical is strategically essential, you'll pay 20–40% more — but you should know that going in.

04 Is your customer in the F1 fan profile?

43% of F1 fans are under 35. The audience skews male, affluent, increasingly digital-first. Outside that profile, impressions won't convert.

05 Do you have a 3-year horizon?

F1 deals are typically structured as 3-year minimum. If your strategy can't commit beyond 12 months, F1 isn't the right channel.

06 Can you measure beyond impressions?

Modern valuation requires media-value tracking, brand-lift studies and sales attribution. Without that, ROI is invisible.

07 Have you evaluated the alternatives?

MotoGP, IndyCar and Formula E all warrant consideration before committing to F1. The portfolio question matters more than the single-series question.

METHODOLOGY & SOURCES

How this report was compiled.

All figures represent publicly reported contract values, industry estimates from established sponsorship valuation firms, and benchmarks drawn from RTR's 30 years of motorsport deal experience.

PRIMARY SOURCES

RacingNews365	Title deal values · Feb–Mar 2026
Ampere Analysis	Market sizing · Feb 2026
Yahoo Sports / Athlon Sports	2026 sponsorship overview
TheStreet	F1 commercial growth · Feb 2026
Relo Metrics	Media value benchmarks · 2025
Formula 1	2025 season audience & demographics
ESPN	US viewership · 2018–2025
RTR Sports Marketing	Proprietary deal benchmarks

DATA NOTES

- 01** All deal values are reported annual contract values unless otherwise stated. Multi-year totals are not used.
- 02** Some figures (e.g. Petronas/Mercedes) are industry estimates rather than publicly confirmed values. Flagged with a tilde (~) where applicable.
- 03** Tier pricing ranges reflect 2026 market conditions and may shift as the season progresses and new deals are confirmed.
- 04** ROI benchmarks are directional and vary significantly by activation strategy, brand fit and measurement methodology.

A NOTE ON ACCURACY

F1 sponsorship deal values are rarely publicly confirmed in full. The figures here represent the best-available industry estimates as of May 2026. RTR updates these benchmarks quarterly and is available to discuss the data underpinning any specific figure on request.

ABOUT RTR SPORTS MARKETING



30 years building motorsport sponsorships that deliver.

RTR Sports Marketing is an independent motorsport sponsorship consultancy founded in 1995. We work with brands at every stage of the sponsorship lifecycle — from strategic evaluation and deal structuring through to activation management and ROI measurement.

Our primary expertise is in MotoGP and Formula 1, with active coverage of Formula E, WEC, WorldSBK, NASCAR, IndyCar and the Dakar Rally. We are independent — we do not represent teams or rights-holders, which means our recommendations are structured around our clients' commercial objectives alone.

Strategic evaluation

Business case, channel comparison and selection across motorsport series.

Activation strategy

Content, hospitality, retail tie-ins, employee programmes — the work that converts media value into outcomes.

Deal structuring

End-to-end management of sponsorship deals — initial outreach to signed contract.

ROI measurement

Independent third-party media-value tracking and brand-lift measurement, with quarterly reporting.

GET IN TOUCH

Ready to evaluate F1 sponsorship for your brand?

Speak with our team about your objectives, budget and target market. We will tell you whether F1 is the right channel — and structure the deal if it is.

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