

Elite Motorsport in 2023

Global fan insight into the world's
premier motorsport championships

Management Report
January 2023

motorsport
NETWORK

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The 1,018,757 individual fans who have given their time and opinion over the past 16 years to help shape the sport's they love.

FORMULA 1 Survey

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NTT INDYCAR Survey

SJ Luedtke, Alex Damron, Alexis Hurley, Bri Young, Jessica Forrest, Ben Reiling, Mark Weiss, Joanne Zhu, James Dickens, Jess McFadyen, all the teams, drivers and partners of the NTT INDYCAR SERIES

MotoGP™ Survey

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About Motorsport Network

Executive Summary

Written by: James Allen
President Motorsport Network

Over a million fans have responded since we began our Global Fan Survey programme, from 197 countries worldwide; 330,000 in the last three surveys alone on F1, MotoGP™ and INDYCAR.

Using the unique power of Motorsport Network with its 62 million monthly unique users and platforms in 15 languages, we have been able to conduct studies that give the clearest picture yet of the evolving attitudes of fans to motorsport. And on the whole it is a positive picture, showing that elite motorsport is well supported, growing and relevant in today's world.

With 167,302 respondents, F1 was not only the largest survey in motorsport, but the largest ever conducted in any sport.

Our Global Fan Survey programme examines fan attitudes across a number of key areas. These include what fans think about the series, what rule changes they welcome and which they do not. It examines in detail what media platforms fans prefer to consume live coverage and content between races and then tracks these and other data points across subsequent studies. We also study race attendance, esports and gaming. All of these are broken down into data tables by age, by gender and by country.

This is important and valuable information for rights holders, who get a comprehensive picture of fan attitudes globally and can also develop their strategy based on fan responses to challenging topics like cost control, sustainability and diversity. A senior executive from one of the elite series we worked with in this period said that they "would use the findings of the survey like a compass to steer the future of our series."

In this management report we have pulled out some key trends and findings from the F1, INDYCAR and MotoGP™ surveys to highlight the state of elite motorsport in 2023.

F1 has done a wonderful job to attract new fans and it was noticeable that in our recent survey over 30% of respondents had been fans for fewer than five years. Perhaps the most striking data is the number of female fans being drawn to elite motorsport, especially F1 which saw double the number of female respondents in the 2021 study compared to 2017. This overlaps with the ownership period of Liberty Media and reflects its push to drive the fanbase younger and more female with a loosening of restrictions on social video for competitors and media as well as the success of the Netflix Drive to Survive series. F1 now skews younger as the table on Page 12 clearly illustrates.

One significant shift in recent years has been the need for all sports to demonstrate a sense of purpose, to provide a wider societal benefit over and above the sporting entertainment offered. Motorsport fans, who are generally forward thinking, early adopters, appear to be willing to embrace this. The majority of fans of INDYCAR, MotoGP™ and F1 believe that their sport develops safety initiatives that benefit society as a whole. We were pleased to see that 66% of F1 fans believe that F1 should play a leading role in the drive towards developing fully sustainable fuels. These will be introduced to the sport in 2026.

I hope you enjoy this report and find much that is of use in it.

James



Methodology

Written by: Nigel Geach
Founder, GC Consultants

Engaging with fans is a key component to keeping up with the ever-changing sports and media landscape. Understanding fans' perspectives and opinions on current and future activities is crucial in helping to shape the future and continued success of any sport.

To this end, we have worked with Motorsport Network and the commercial rights holders for FORMULA 1, MotoGP™, NTT INDYCAR and the FIA World Endurance Championship to engage with their global fanbases and conduct the most comprehensive surveys ever conducted.

Our work and insight stretches back to 2005 with the first F1 Fan Survey, since which time we have created and translated eleven (11) global research studies into 16 languages and hosted each of these via a common, multi-lingual website. Since 2005 we have received and analysed responses from over 1m motorsport fans in 197 countries worldwide.

In the past eighteen (18) months three (3) studies have been conducted in collaboration with FORMULA 1, MotoGP™ and NTT INDYCAR; attracting a cumulative sample of over 330,000 individual fan insights. These individual studies have provided detailed insights from fans and helped to establish benchmarks for each rights holder.

The value of engaging and listening to your fans is evident through this process. Capturing the perception of the sport from diverse respondents around the world allows fans' voices to be heard. Being able to leverage the views of motorsport fans now and in the future can only serve to strengthen the sport moving forward in the coming years.



The Audience

- 11 studies conducted since 2005, with 1m+ responses analysed
- Surveys spanning F1, MotoGP™, INDYCAR, WorldSBK and FIAWEC
- Since 2021 - Over 330k fans surveyed across F1, MotoGP™ and INDYCAR
- Fan feedback received from 197 countries worldwide
- Two-thirds of fans following motorsport for 10 years or more
- Female participation has doubled in past 5 years
- F1 attracts significantly younger, newer audience
- Average age of respondents is 36 years and 8 months

Since 2005 Motorsport Network has undertaken the largest sports surveys ever conducted in the sphere of motorsport. The eleven (11) studies carried to date have analysed feedback from over 1m fans worldwide.

These studies have captured fan opinion in unprecedented numbers and detail; working with motorsport's leading commercial rights holders and regulators we have conducted studies among fans of FORMULA 1, MotoGP™, NTT INDYCAR, WorldSBK and FIA World Endurance Championship. No one knows more about motorsport fans and their opinions than us.

Since September 2021 we have conducted three (3) global fan studies in partnership with some of the world's biggest motorsport series – FORMULA 1, MotoGP™ and NTT INDYCAR.

These surveys were created by Motorsport Network in partnership with the rights holders and translated in up to 15 languages; each was hosted via a common, multi-lingual website created and operated by Motorsport Network.

The three studies conducted since September 2021 attracted a combined audience of over 330,000 fan responses. In each case data collation, tabulation and analysis was conducted by industry leader, Nielsen Sports.

Motorsport Fan Surveys 2021 & 2022			
Fieldwork Period			
Series	From	To	Sample
FORMULA 1	8/9/21	7/10/21	167,302
NTT INDYCAR	10/1/22	31/1/22	53,579
MotoGP™	16/6/22	10/7/22	109,676
Total			330,557

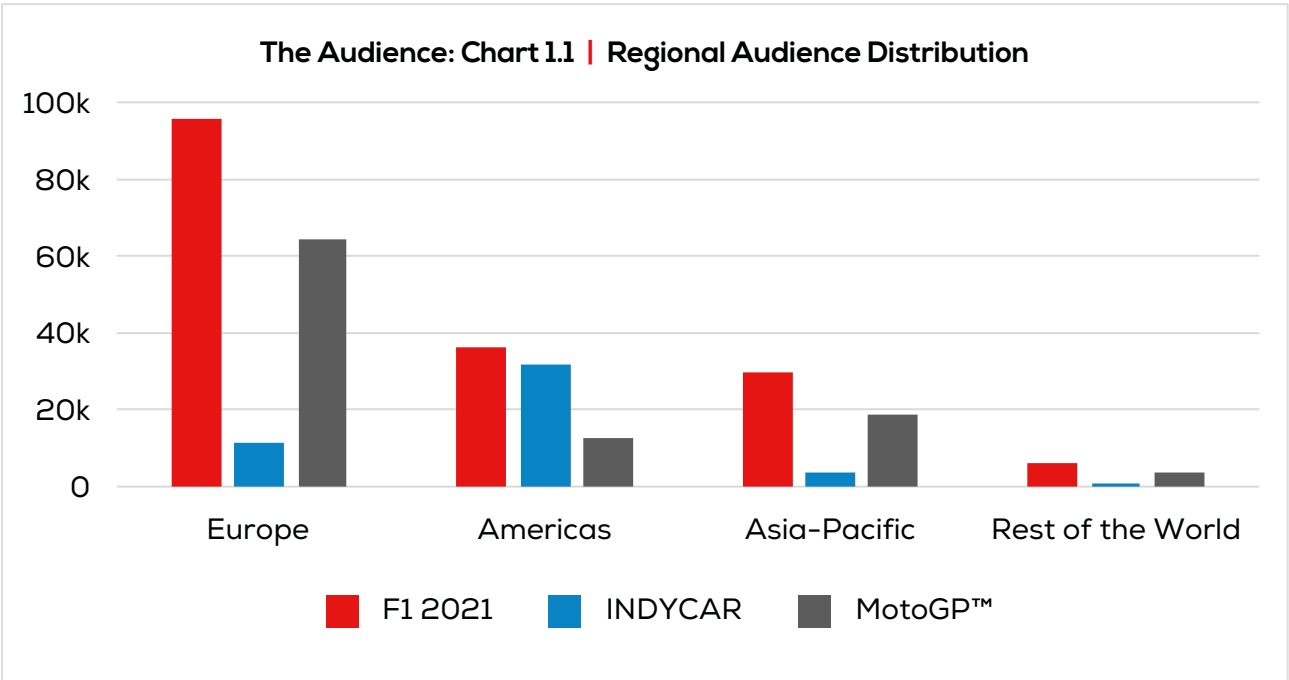
Average completion time ranged between 10m 01s for FORMULA 1 up to 15m 17s for INDYCAR. The average completion time for fans stands at 11m 58s.

In total there were over half a million individual user sessions (506,205) with fans investing a cumulative 101,004 hours (11.5 years) in submitting their feedback.

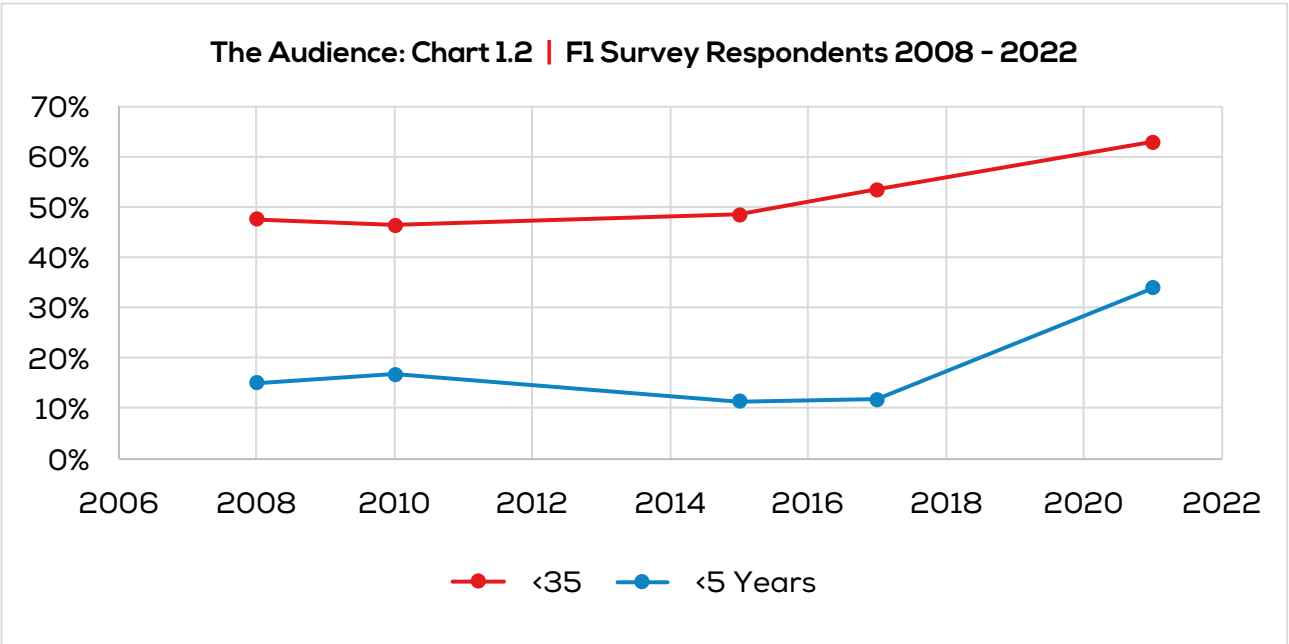
Each study enabled analysis by age, gender, geographic region, level of interest as well as breakdowns for the Top 15 markets by response.



Since 2021, we have collected responses from fans in 197 countries worldwide, 96% of the countries recognised by the United Nations. Of this response, 55% has come from Europe, 36% from the Americas, 16.5% from Asia-Pacific and 3% from the Rest of the World.



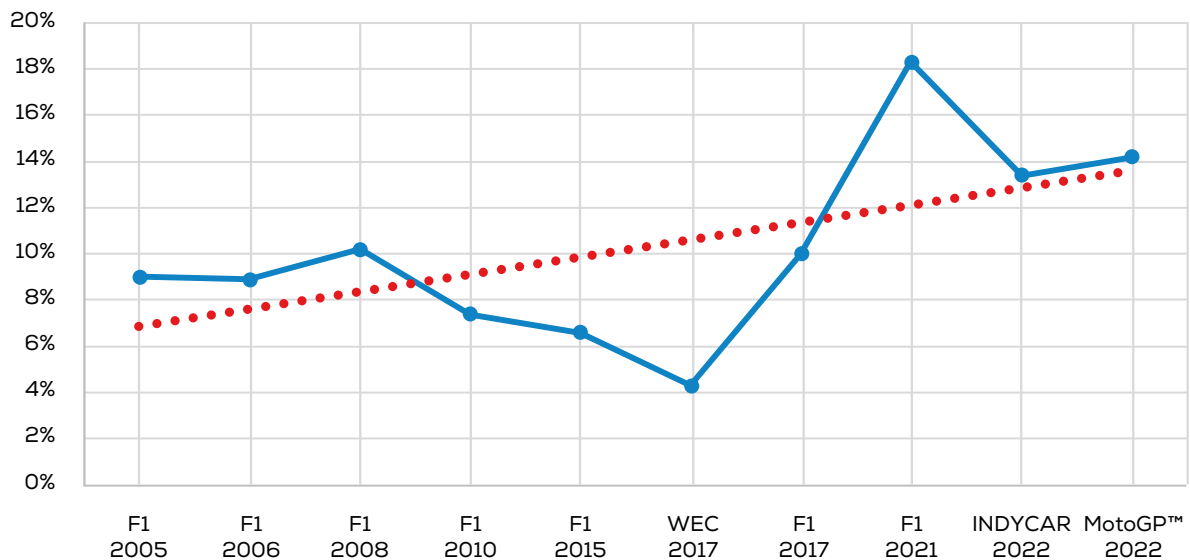
The audience responding to our studies are hugely knowledgeable, since 2005 over 90% of respondents to our surveys identify themselves as Avid fans; with two-thirds (65.6%) having followed motorsport for more than 10 years. Since 2017, FORMULA 1 has been the most successful at recruiting new fans with over 30% of fans interviewed in 2021 following the sport for less than 5 years.





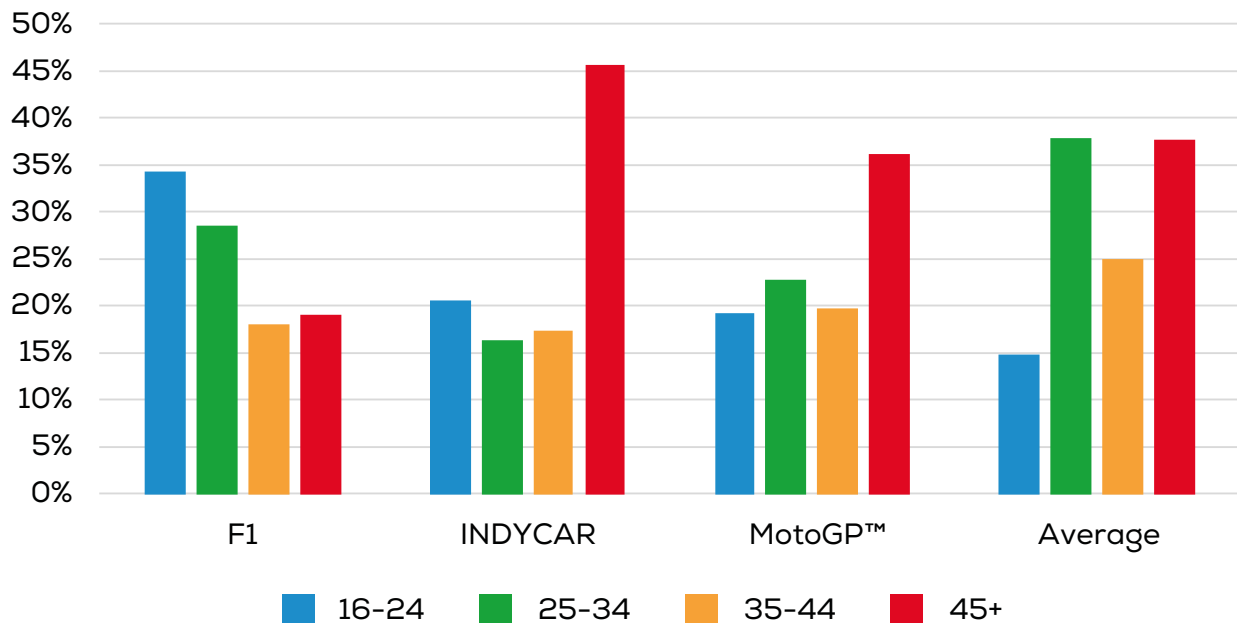
Reviewing our data since 2005, we can track an increasing response from female fans; analyzing response from our studies in 2017 and 2021, participation among female FORMULA 1 fans increased by 83% from 10% in 2017 to 18.3% in 2021. In our 2022 studies both INDYCAR (13.4%) and MotoGP™ (14.2%) enjoyed a female response significantly greater than our historical average of 1 in 10. Based on our data, FORMULA 1 has displayed the greatest success in attracting an increasingly female audience.

The Audience: Chart 1.3 | Percentage of Female Respondents 2005 - 2022



Since 2005 our studies have recorded a consistent age profile for respondents. Since 2005 the average age of respondents is 36 years & 8 months; notable variances from this were our FORMULA 1 Study in 2021, where we saw the average age of respondents fall by over 4 years to 32 years and the NTT INDYCAR Survey in 2022 which had an average respondent age of 42 years and 3 months.

The Audience: Chart 1.4 | Age Profile of Respondents 2021 - 2022





Brand Attributes

- Core motorsport attributes – Exciting, Competitive and Entertaining
- #1 ranked Series attribute – Competitive cited by 58% of all fans
- Key features – Exciting racing, close competition, lots of on-track action
- Across all series' fans believe more needs to be done to attract new fans
- Over 60% of fans believe motorsport delivers safety benefits for road users
- 66% of F1 fans view it as a key platform to drive sustainability and innovation
- Most fans believe series have the right balance of sport and entertainment

Since 2010 Motorsport Network have captured spontaneous fan feedback on the health of motorsport. Each study contains a list of 35 brand attributes and fans are asked to cite the top 5 characteristics that they believe best represent their series.

While individual series will attract differing responses from their fanbase we have witnessed some common themes across F1, INDYCAR and MotoGP™.

Since 2017, fans of each series researched have overwhelmingly selected positive brand attributes; this is a sharp contrast to work undertaken in 2015 where attributes including Boring, Corrupt and Threatened appeared in 10 most common features.

Analysing all 3 studies we can conclude that the top motorsport brand attributes are:

Brand Attributes: Chart 2.1 | Top Brand Attributes Across F1, INDYCAR and MotoGP™

Technological Unpredictable Cool
 Prestigious **Competitive** Accessible
Exciting **Entertaining** Fun
 World Class Dangerous Courageous Growing



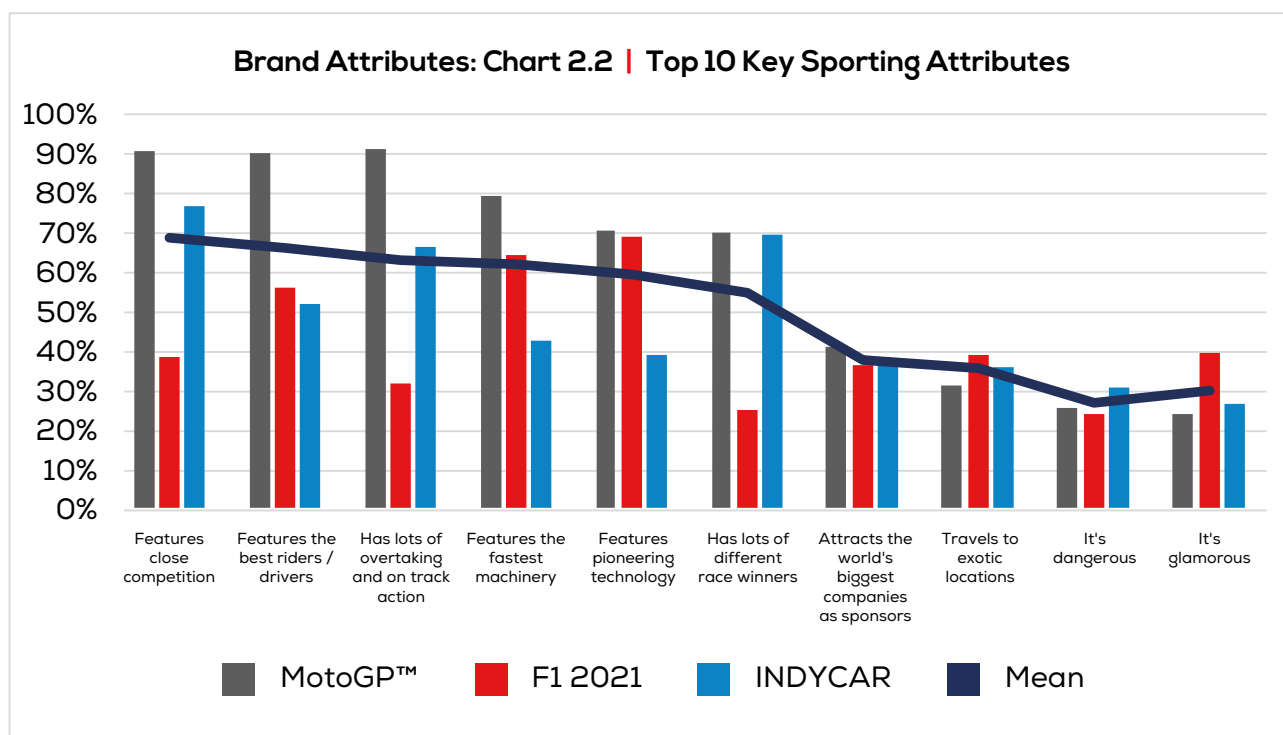
In addition to measuring brand positivity, our studies have interrogated opinion on sporting delivery against key areas of fan appeal for each motorsport series.

And here we have seen some interesting divergence between the fans of individual series.

For all motorsport fans, the appeal of exciting racing featuring close competition and different winners is important. However, fans of each series have differing views on delivery. The vast majority of MotoGP™ fans (90%+) agree that the series is delivering against all three of these measures; in INDYCAR the agreement levels is nearer 75% whereas in FORMULA 1 it is around 50%.

In terms of featuring the world's best riders & drivers; MotoGP™ again scores very highly with a 90%+ approval rating; it is 56% for F1 and 52% for INDYCAR.

In terms of featuring pioneering technology and the fastest machinery both MotoGP™ and F1 receive high fan approval ratings of more than 65% with INDYCAR nearer 40%.



We have also sought fan feedback across a variety of sporting statements, the findings again highlight differing fan opinions across series.

When asked if the series represented the pinnacle of motorsport – agreement was highest among F1 fans at 90%, slightly lower among MotoGP™ fans at 84% and 71% among INDYCAR fans.

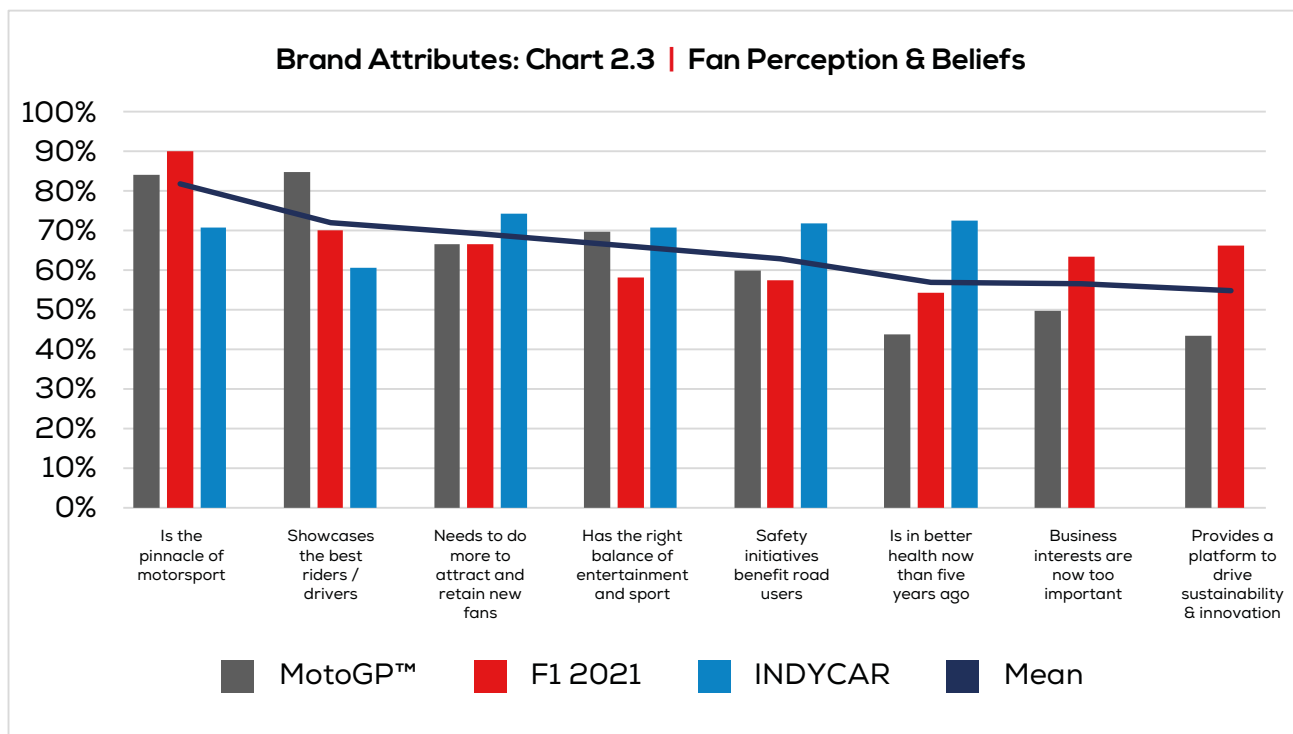
In terms of delivering the right balance of sport & entertainment – INDYCAR is perceived as performing well on this measure with 71% of fans in agreement; it is 70% among MotoGP™ fans and 58% among F1 fans.



Fans of all 3 series' believe more needs to be done to attract new fans with 74% of INDYCAR fans calling for more effort, with two-thirds (66%) of both MotoGP™ and F1 doing likewise.

Fans of all series surveyed believe that 'their' sport develops safety initiatives that benefit all road users – with 72% of INDYCAR fans in agreement, followed by MotoGP™ at 60% and F1 at 57%. In addition, fans of MotoGP™ and F1 were asked whether the sport provided a platform to drive sustainability & innovation – over two-thirds of F1 fans were in agreement, it was 44% among MotoGP™ fans.

Fans were surveyed on whether they felt the series was in better health than 5 years ago – in this regard INDYCAR fans were with 73% in agreement; it was 55% for F1 fans and 44% for MotoGP™ fans.





Teams, Riders & Drivers

Written by: Charles Bradley
Editor in Chief, Motorsport.com

- Fans are non-tribal and overwhelmingly 'sport-first' with over 75% of all fans supporting a number of competitors across F1, INDYCAR and MotoGP™
- In FORMULA 1:
 - McLaren, Red Bull Racing and Ferrari are the 3 most popular teams
 - Max Verstappen, Lando Norris and Lewis Hamilton are the 3 most popular drivers
- In NTT INDYCAR:
 - Penske, Andretti and Arrow McLaren SP are the 3 most popular teams
 - Romain Grosjean, Pato O'Ward and Helio Castroneves are the 3 most popular drivers
- In MotoGP™:
 - Yamaha, Ducati and Honda are the 3 most popular teams
 - Fabio Quartararo, Marc Marquex and Francesco Bagnaia are the 3 most popular riders
- Female fans and those aged under 24 were more likely to follow a single driver/rider

Tribalism proliferates across the sports world, and the noun 'fan' literally means *'a person who has a strong interest in, or admiration for, a particular person or thing'*. Of course, in motorsports, that can be a driver or rider, a brand of car or motorbike manufacturer or a race team. We only need look to a grandstand at any major racing event to see teams and drivers being enthusiastically supported by fans wearing their colours, caps or waving flags. You can think of it as a nod to our most basic caveman past, where human evolution of making connections with like-minded others was built upon tribalism – as groups of people who could be liked, trusted and depended upon improved each individual's chances of basic survival.

Those who thrived were to be celebrated and followed, and as that tribe became an extension of each its individual members, so every victory (however small) and increased chances of success equalled a 'dopamine hit' for their followers and underlined that collective's feelgood factor.

What has truly been fascinating to discover during our experience of Global Fan Surveys is that motorsport isn't anything like as simple as, for example, football/soccer – where you typically support one team (for life if you're a true fan) and your country of birth. What we discovered here is that motor racing fans are truly 'sport first' rather than solely motivated by a driver/player or team/club – this data is reflected across FORMULA 1, MotoGP™ and INDYCAR.



In each of these major disciplines, over 75% of fans say they supported “a number of competitors” rather than being completely devoted to one. INDYCAR was the standout here: Nearly 80% said that they support “a number of teams”.

The highest percentage recorded for loyalty to a single personality was MotoGP™’s 17.2%, compared to F1’s 15% and INDYCAR’s 13.2%. In terms of teams, 12.4% of F1 fans said they were loyal to only one, compared to INDYCAR’s 7.9% and MotoGP™’s 6%.

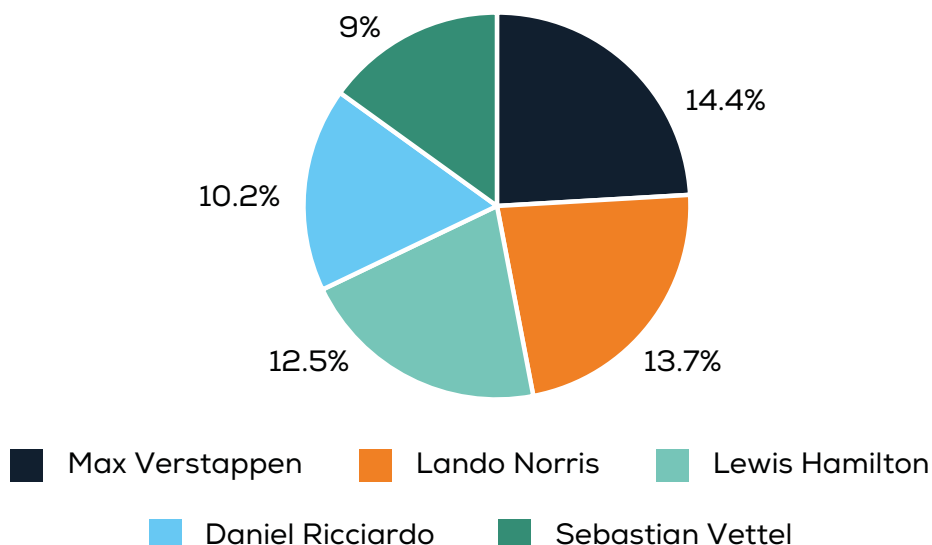
Strong national and regional support was also evident across the board when it came to both individual competitors and teams/manufacturers. Demographic trends in gender and age were also interesting; the surveys revealed that female fans were 50% more likely to support one driver or rider. In total, 21% of females follow a favourite, while 14% of male fans do likewise – with the most dedicated age range to do so being 16-24.

Starting with FORMULA 1, the global pinnacle of single-seater racing, in our most recent survey the three most popular teams with fans are McLaren, Red Bull Racing and Ferrari. Although Mercedes doesn’t feature in that top three, its seven-time World Champion Lewis Hamilton does in the most-popular driver stakes, along with now two-time champ Max Verstappen – who topped the poll – and the very amiable McLaren youngster Lando Norris. This poll was taken before the controversial end-of-2021-season Hamilton/Verstappen title denouement, however.

One aspect to look out for in future F1 surveys will be the losses of hugely admired maverick Kimi Raikkonen and the fourth and fifth best-supported drivers in our 2021 survey, Daniel Ricciardo and Sebastian Vettel. While F1’s profile in popular culture has been exploded by the Netflix TV series Drive To Survive across recent years, it will be interesting to note how the absence of those three star names impacts the landscape among fans and how the void will be filled in the popularity stakes.

One thing we can say for sure is that Verstappen’s support has sky-rocketed since he entered F1. His share of the popularity vote was just 3.8% in 2015, rising to 7.4% and 14.4% in subsequent surveys. Hamilton, meanwhile, peaked in 2017 at over 20%, slipping back to 12.5% in 2021.

Teams, Riders & Drivers: Chart 3.1 | F1 2021 - Top 5 Drivers





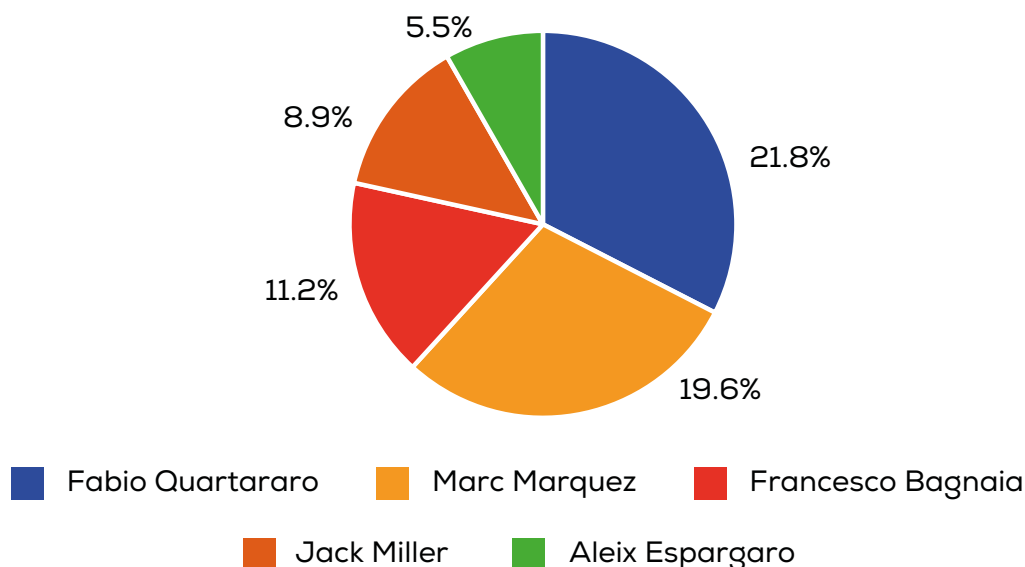
Another huge shift in perception has been at Ferrari, which has habitually had support of about 30% in our previous surveys. But in the most recent survey this fell to 17.9%. This effectively flipped with McLaren's fortunes, as the British marque moved towards the front of the grid again and scored a brand-high 29.5% in our most recent poll, largely driven by its hard work on driving social media reach. Red Bull, meantime, has shown steady growth among fans since it began winning world championships in 2010. From 9.7% back then, it scored 19.8% most recently amid this 'Verstappen era'.

MotoGP™ saw one of its all-time great riders, Valentino Rossi, retire at the end of 2021. In addition to this, although Rossi remains connected to the series as a team owner and staunch supporter of young riders, his natural successor Marc Marquez has been blighted with injury and missed many races following multiple surgeries. However, Marquez remains one of its top-three most-supported riders. In their stead, new champions Fabio Quartararo and Francesco Bagnaia have risen to the fore in a rivalry that could run and run. On the teams' side, the star power packed by the factory teams from Yamaha, Ducati and Honda puts them out in front as fan favourites. Expect the Italian fervour for the Bagnaia/Ducati combination to grow now that they have sealed the 2022 titles.

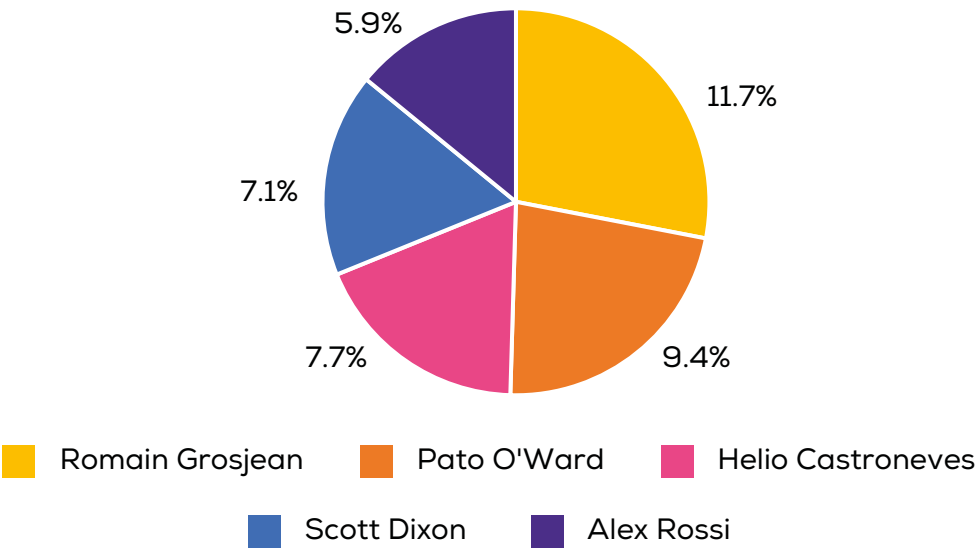
In INDYCAR, America's top open-wheel series which races on a variety of racetrack formats, it is the mighty Team Penske and Andretti Autosport teams that lead the way – but Arrow McLaren SP's rise to the sharp end of the grid is being reflected in fan support too. Among the drivers on this cosmopolitan grid, recent F1 import Romain Grosjean brought his legion of supporters with him, as well as making many new fans in the United States too. In his first fulltime season, Andretti's Frenchman headed the flamboyant Mexican Pato O'Ward and series legend Helio Castroneves, the four-time Indy 500 winner, in the popularity stakes. The survey was conducted before another F1 refugee, Marcus Ericsson, won his first Indy 500, so it's fair to deduce that INDYCAR's strength in depth is on a roll right now.

It's fascinating to compare these major series, and the underlying trend that connects them is the avid passion for the sport that all their fans display.

Teams, Riders & Drivers: Chart 3.2 | MotoGP™ 2022 - Top 5 Riders



Teams, Riders & Drivers: Chart 3.3 | INDYCAR 2022 - Top 5 Drivers



Cross Series Following

- FORMULA 1 is followed by 85% of all fans making it the world's most followed motorsport series.
 - MotoGP™ is the second most followed series, with 49% of all fans worldwide following the series
 - FIAWEC is the 3rd most followed series with 45% of all fans following the series
 - NTT INDYCAR is the 4th most followed motorsport series worldwide with 39% of all fans following the series; however, it is the 2nd most followed series after F1 for fans in the Americas with 53% of all US motorsport fans following the series.
 - The fifth most followed series for fans is WRC with 25% of all fans following the championship
-

Based on analysis of over half a million fan responses captured since 2017, we can confirm that globally FORMULA 1 is the most followed category of motorsport with 84% of all fans surveyed across F1, MotoGP™, INDYCAR and World Endurance Championship following the series.

The broad nature of our research has highlighted that while motorsport fans have a series they will follow more closely than others; they do follow numerous motorsport series to satisfy their passion. Our research dispels to a great extent the 2-wheels vs 4-wheels divide; with F1 being the 2nd most popular series among MotoGP™ fans and in 2017 F1 Study, MotoGP™ being the 2nd most followed series after F1.

As well as ranking #1 as the most followed series among F1 fans in our studies of 2017 & 2021; F1 was the second most popular series among fans in our studies of FIA WEC (2017), MotoGP™ (2022) and INDYCAR (2022).

Based on all studies conducted in the past 5 years, FORMULA 1 is followed by 84.5% of global motorsport fans.

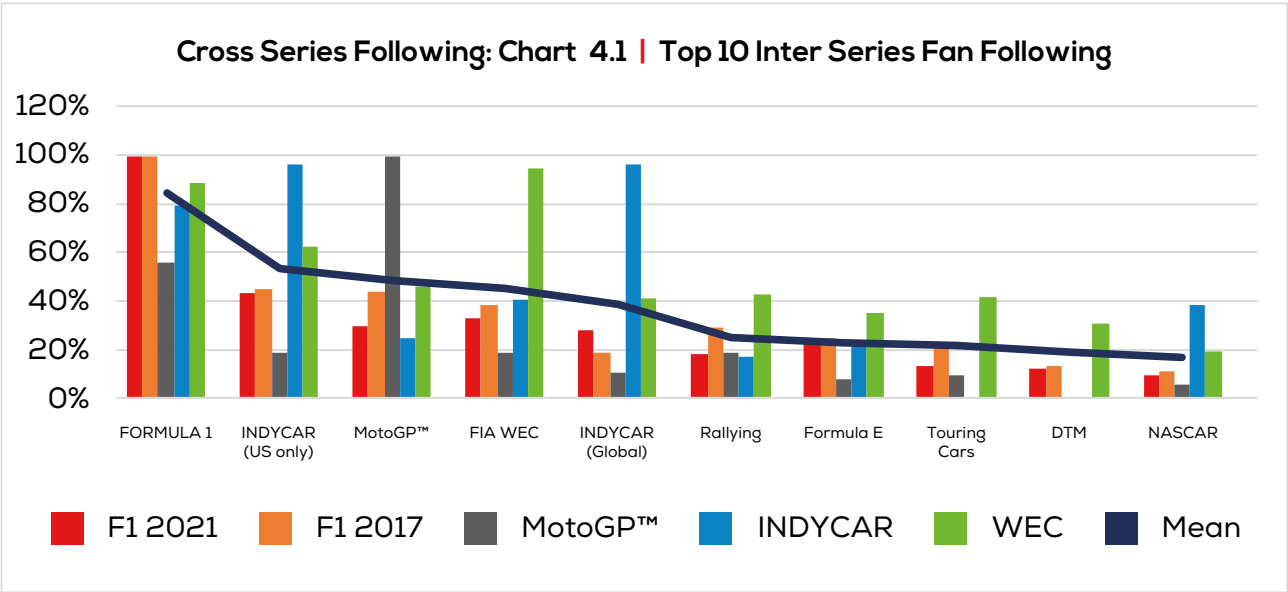
MotoGP™ is the second most followed series, with 49% of all fans worldwide following the series, in addition to being ranked #1 among MotoGP™ fans in 2022, the series ranked #2 among F1 fans in 2017, #3 among F1 fans in 2021 and #4 among FIA WEC (2017) and INDYCAR (2022) fans.

The third most followed series worldwide is FIA World Endurance (FIA WEC) with 45.0% of all fans followed the series. WEC is ranked #2 among F1 fans in 2021 and #3 for F1 (2017), MotoGP™ (2022) and INDYCAR (2022).

On a global basis NTT INDYCAR is the 4th most followed motorsport series, with 39% of all motorsport fans following the series; however, reflective of its strong North American base; it is ranked the #2 most followed motorsport series across the Americas with 53% of all fans in North, South and Central America following the series.



Rallying is the 5th most followed motorsport category worldwide with just over a quarter (25.2%) of all fans surveyed following rallying around the globe.



Beyond these Top 5 series no other form of motorsport is followed by more than 20% of all fans worldwide.





Media Landscape

- Dedicated motorsport websites are the #1 most used media source of fans
- Free to air TV and PayTV are the #2 & #3 most accessed media
- Social media usage is high with Twitter the #1 social media platform at 31% closely followed by Facebook at 30% and Instagram at 28%
- Over 25% of fans are now regularly streaming race content to laptop and desktops
- TV is by far the most preferred source for future content consumption
- Live race TV coverage is most popular among F1 fans
- Demand for online streaming (20%) and on demand video (10%) is low
- Recorded races and highlights have low popularity across all fanbases > 4%

As we will report in Chapter 6 (Race Attendance) motorsport fans generally, and FORMULA 1 fans in particular are increasingly reliant on third party media as a means to follow the sport.

Motorsport fans across multiple series utilize a multitude of different media platforms to access content.

Our studies spanning across FORMULA 1, MotoGP™, INDYCAR and World Endurance Championship (WEC) have provided us with some invaluable insights in present and future media consumption habits among fans.

Television broadcast content and dedicated motorsport websites dominate the media consumption of all motorsport fans.

Overall dedicated motorsport websites, such as Motorsport.com and Autosport.com are the new #1 most accessed medium for motorsport news and information – nearly 60% of fans frequently access them for news and information.

Usage of dedicated websites is highest among WEC fans at an staggering 93.4%, this falls 51% among F1 fans, 46% among fans of MotoGP™ and is at it's lowest among INDYCAR fans at 37%. Dedicated websites are the #1 most used media for fans of WEC and 2nd most popular channel for all other series.

Free to air TV is the #2 most accessed media for motorsport content with 51% of all fans surveyed since 2017 taking advantage of free to air broadcasts. However, the continuing expansion of PayTV as a primary source of motorsport content is driving a corresponding decline in free to air TV usage over time. This phenomenon is best illustrated in the results of the F1 Studies in 2017 & 2021. In the intervening 4 years between surveys Free to Air TV consumption fell from 68.7% to 29.9%, while Pay TV increased to 49.3% making it the #1 most accessed content platform for F1 coverage. The business benefit for sports rights holders to maximise the value of their content is expected to fuel the continuing growth of PayTV as the 'go to' source of motorsport content.



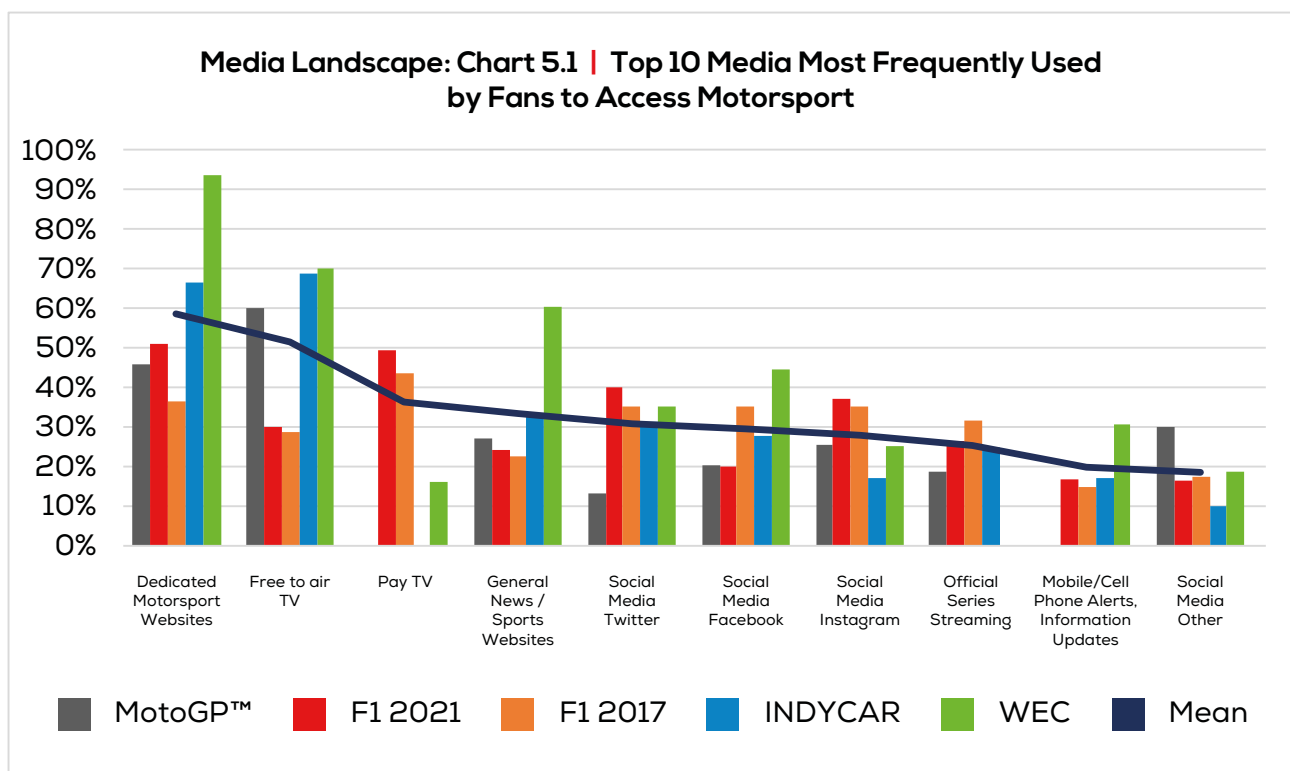
Pay TV is also the #1 most accessed platform for MotoGP™ & INDYCAR content. While subscription costs have had a small impact on Pay TV viewing audiences, the quality and quantity of output is seen by the majority of fans to outweigh any cost disadvantage.

Outside of TV and dedicated motorsport websites; General sports websites enjoy strong support with one third of fans using them frequently for accessing motorsport content; usage is highest at 60% among WEC fans, but this falls to 25% - 30% among fans of F1, MotoGP™ and INDYCAR.

Social Media is widely used to access motorsport content with around 30% of fans accessing content frequently via a mix of Twitter, Instagram and Facebook; from our studies since 2017 we can see a gradual switching of preference away from Facebook and Twitter and towards Instagram. In future studies we will monitor the growth of new platforms such as TikTok as a destination for motorsport content.

Official Series' streamed/on-demand content is consumed by 20% to 25% of all fans across series; INDYCAR fans show the greatest consumption of streaming with over 30% of fans accessing content this way. Mobile phone updates are used by around one in five fans worldwide.

Newspapers, magazines and radio have fallen dramatically since we began our research back in 2005 and have all now dropped below 10% in terms of fan usage.

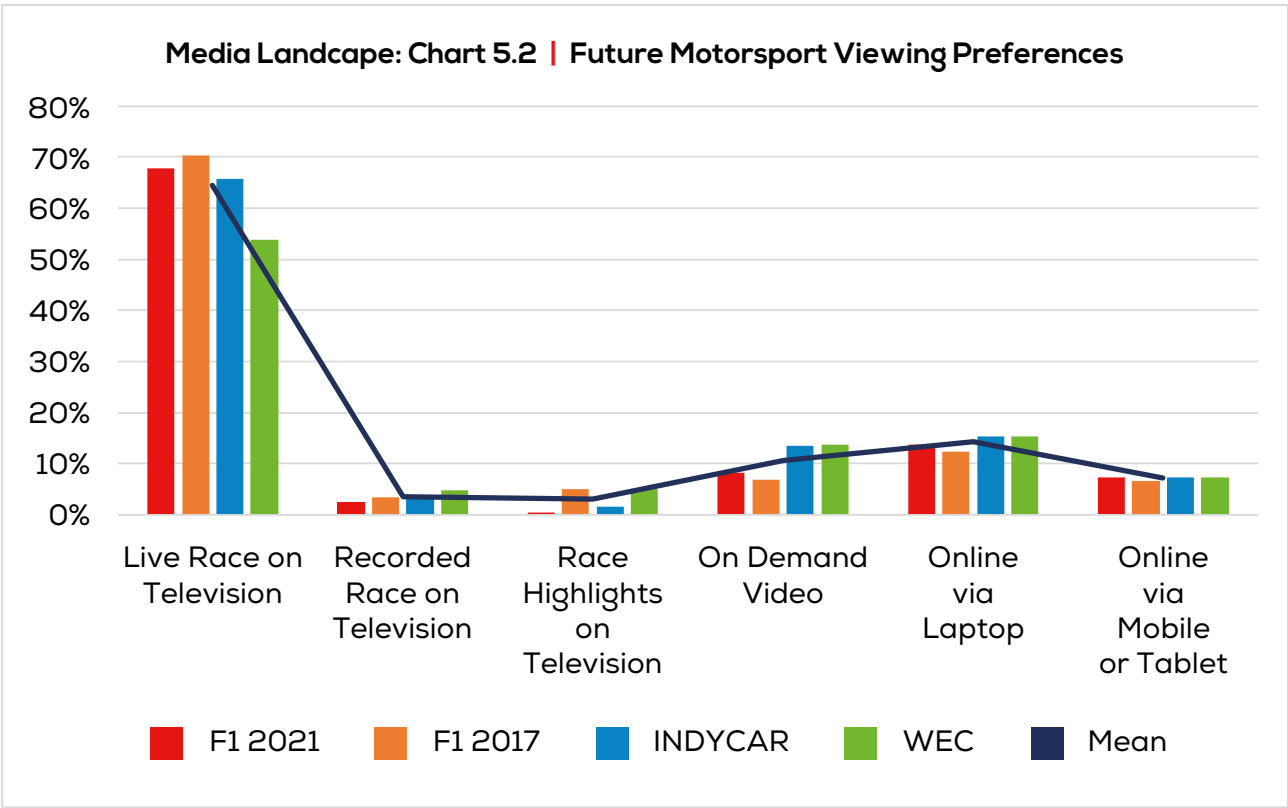


For the future, fans across all series researched have expressed a clear preference to watch Live Races via TV; this is far and away the most popular platform with nearly two-thirds (64%) wishing to access content this way in the future.

Reflecting the popularity of streamed content – online delivery via PC or laptop is the second most popular method, with 12.5% - 15% of fans expressing a desire to consume content this way in the future – online streaming is most popular among INDYCAR and WEC fans.



Outside of Live TV or streamed content, there are no other future content delivery options that appeal to more than 10% of any given series' audience. Both recorded race and recorded Highlights appeal to less than 5% of motorsport fans.





Race Attendance

- Driven in part by geography, race attendance varies by series. 48% of INDYCAR have attended a race in the past 5 years; this falls to 41% for MotoGP™ fans and 19% for F1 fans.
- FORMULA 1 fans are prepared to pay the most to attend an event – up to \$245 for a race day ticket; this stands at \$136 for INDYCAR and \$127 for MotoGP™
- Female fans are more likely to attend MotoGP™ and INDYCAR races
- The 5 most important race features for fans are:
 - Good vantage points (83%)
 - Ease of travel to event (66%)
 - Ease of parking (63%)
 - Pit Lane walkabouts (58%)
 - Paddock Tours (56%)

INDYCAR fans are more likely to attend a race than fans in F1 or MotoGP™, with nearly half of all respondents (48.3%) having attended a race in the past 5 years. This figure increases to nearly 70% among North American fans, by comparison F1 race attendance is under 20%.

Among race-going fans, the Indianapolis 500 is by far the most popular single event with nearly 6 in 10 (59%) of INDYCAR Survey respondents having experienced the “Greatest Spectacle in Racing” first hand in the past 5 years.

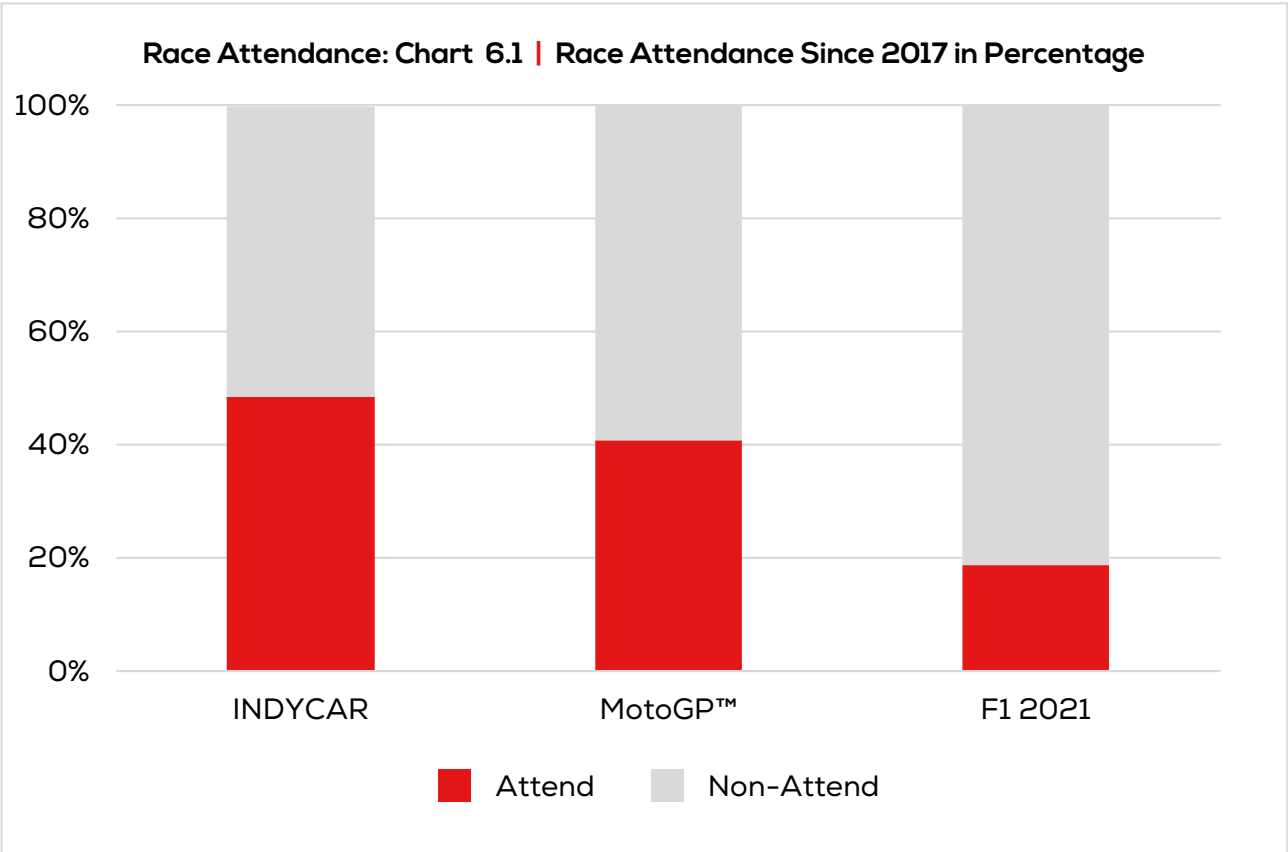
MotoGP™ fans are twice as likely to attend a race than fans in F1, with over 40% of all respondents having attended a race in the past 5 years and 23.6% of fans travelling to attend a race outside of their home market.

Fans in the Netherlands are the most active race goers; with nearly three-quarters (73%) of Dutch fans attending a race in the past 5 years. Race attendance in the past 5 years across Europe is strong, especially in light of the impact of COVID.

Among race-going fans, the Dutch GP in Assen is the most popular single event with nearly a quarter (24%) of fans attending in the past 5 years. Races in Spain and Italy were also well attended by fans – Mugello (23%), Misano (22%), Catalunya (22%) and Valencia (20%).

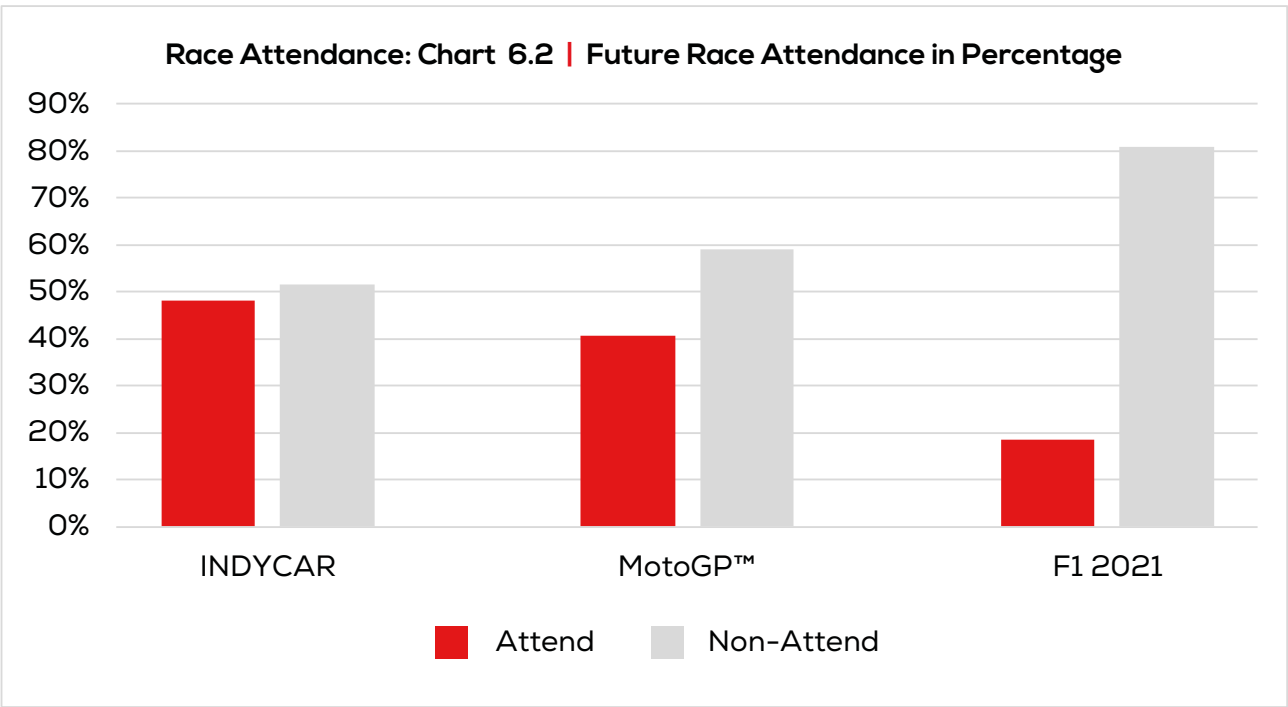
FORMULA 1 continues to be an increasingly ‘media-driven’ sport, with less than 20% FORMULA 1’s most Avid fans attending a Grand Prix in the past 5 years. While 75% of F1 2021 Survey respondents reside in a country with a ‘home’ Grand Prix; only 2.5% of fans have attended their ‘home’ race each year since 2017.



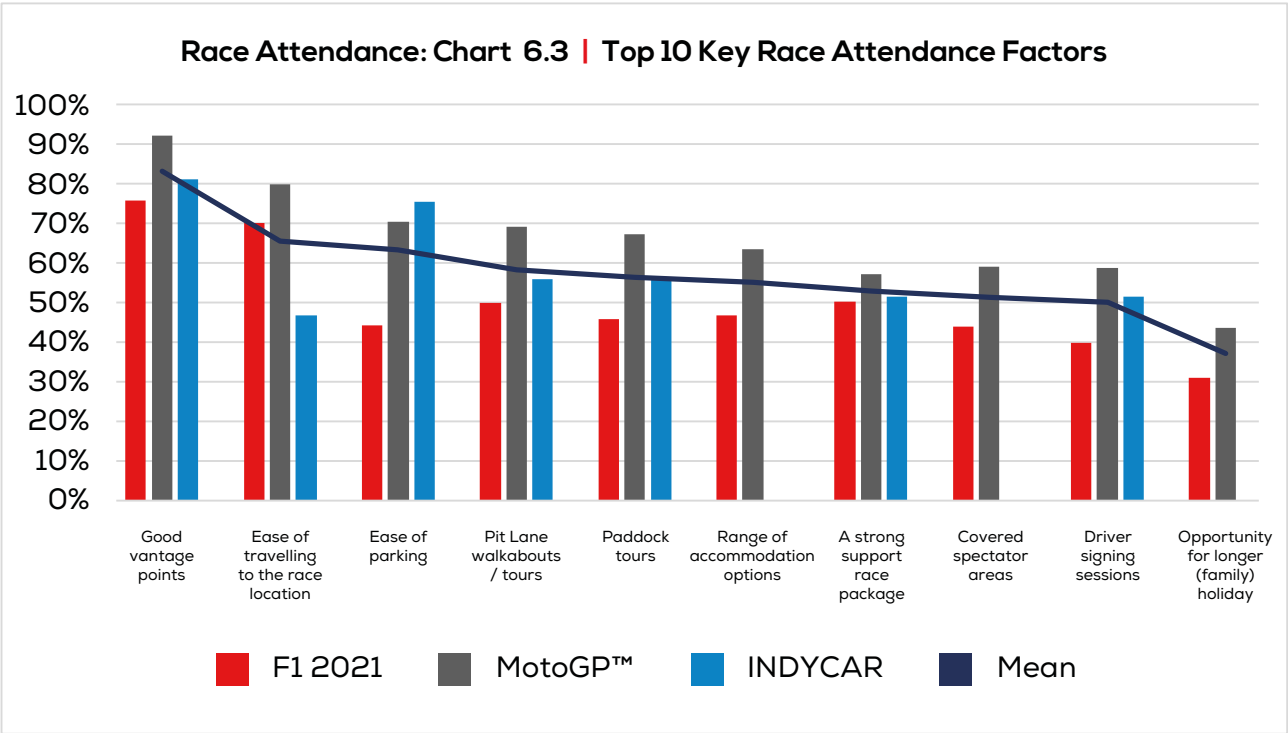


When considering fans’ likelihood to attend a live race in the future; again, we have recorded a significant variance between F1 and MotoGP™ & INDYCAR fans. While 40-50% of all INDYCAR & MotoGP™ fans plan to attend a race within the next 3 years; this figure is around 19% among F1 fans.

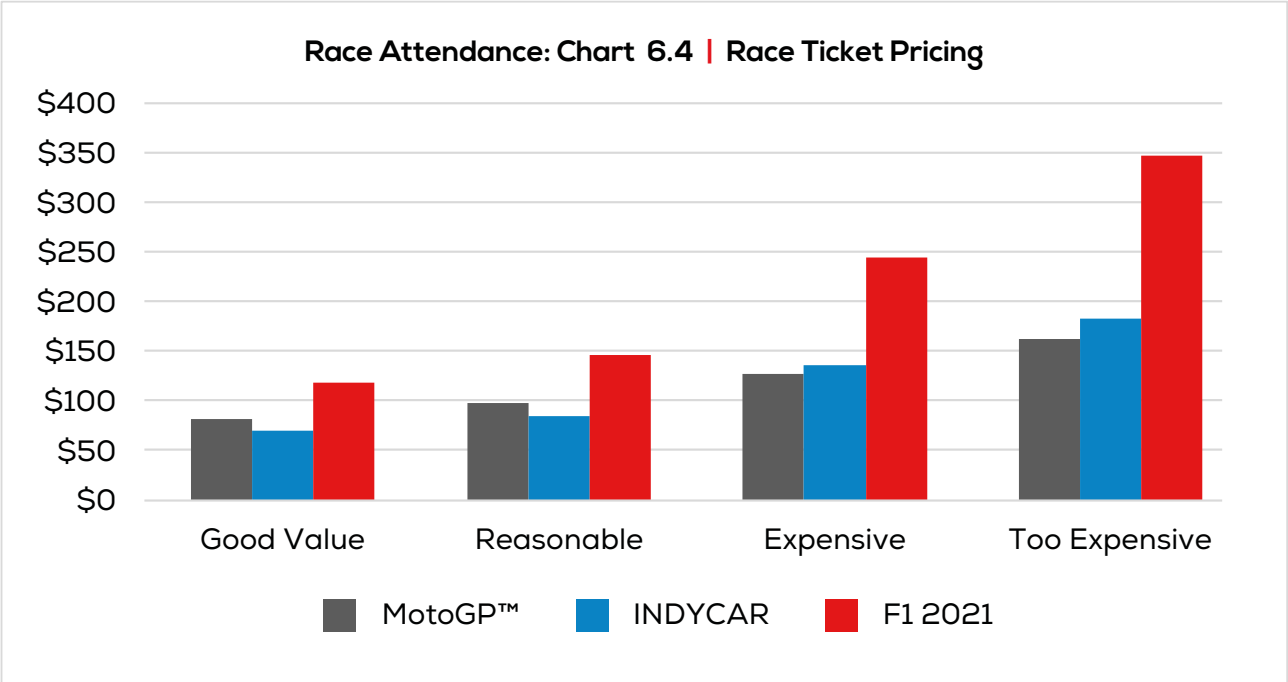
Our research showed that female fans were more likely to attend MotoGP™ (48% vs 39%) and INDYCAR (55% vs 48%) races; the variance in F1 between genders was less than 2%.







In terms of race day ticket pricing, our research has shown that F1 fans have a greater willingness to pay more for accessing events. FORMULA 1 fans are prepared to pay up to \$245 for a race day ticket; this stands at \$136 for INDYCAR and \$127 for MotoGP™.



General Admission Ticket Pricing (\$)	MotoGP™	INDYCAR	F1 2021
Good value	\$81.88	\$69.30	\$117.53
Reasonable	\$98.08	\$84.47	\$145.82
Expensive	\$126.57	\$135.74	\$244.75
Too expensive	\$162.71	\$182.94	\$346.62



Esports

- Half of all motorsport fans are gaming every week. F1 – 51%, INDYCAR – 49%, MotoGP™ – 41%
- Weekly gaming rises to over 70% among the 16-24 age group, peaking at 85% among 16-24 INDYCAR fans
- On average 29.3% of female fans are gaming weekly compared to 50.7% among males
- The gender disparity is highest among F1 fans with only 19% of females gaming weekly compared to 59% of males
- Gaming participation falls with age, declining to 17% among fans 55+
- Nearly three quarters (73%) of fans use a games console for playing; 44% of fans engage in Esports via a PC or laptop making it the 2nd most popular platform
- 36% of all fans engaged in mobile gaming, with participation notably higher among female fans (48% vs 35%)

Our research since 2021 across F1, INDYCAR and MotoGP™ has shown that 50% of all fans are engaged in gaming at least once per week.

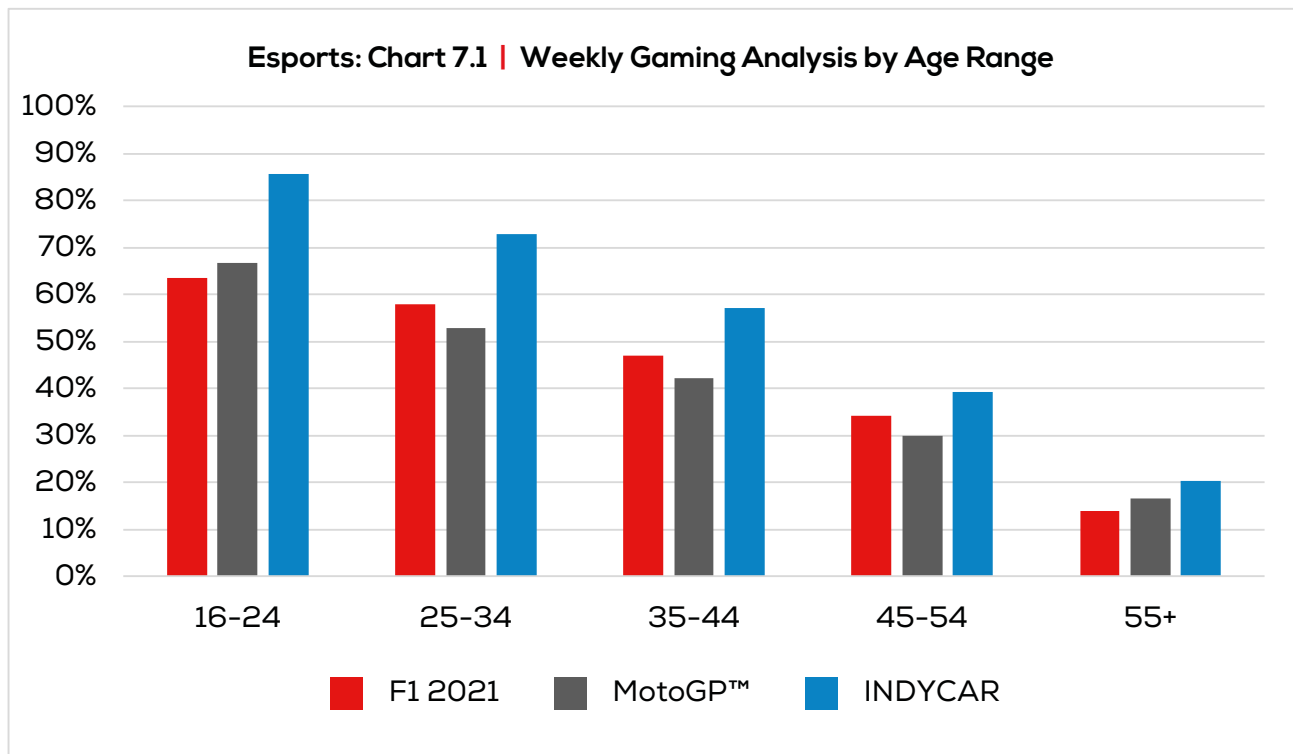
Weekly participation is marginally higher among F1 fans (51%) than MotoGP™ fans (41%).

Gaming participation is impacted significantly by gender and age profile and less by geography.

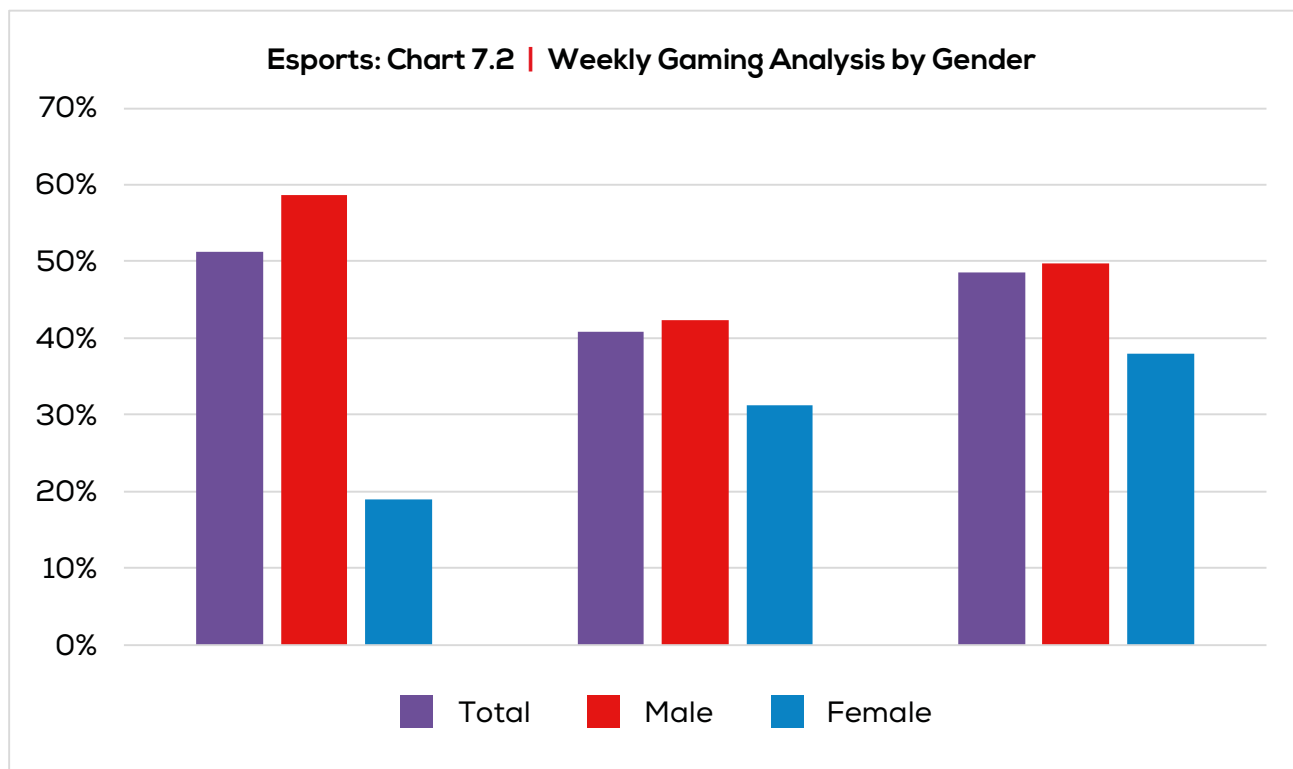
Among 16-24 fans weekly gaming increases to 70% across all three series; peaking at 85% among 16-24-year-old INDYCAR fans. Gaming participation falls with age, declining to <17% of all fans engaged in weekly gaming in the 55+ age group.







Male fans are 75% more likely to engage in weekly gaming than female fans; this disparity is at it's highest among F1 fans; where male fans are three times more likely to be gaming on a weekly compared to female fans (59% vs 19%).



Console based gaming is by far the most popular platform for fans to participate in gaming with 73% of all gamers using Xbox, PlayStation or Nintendo Switch. The second most popular platform is PC based gaming which is enjoyed by 44% of all gamers across F1, MotoGP™ & INDYCAR. Mobile gaming is popular among 36% of all fans and significantly more popular among female fans (48% vs 35%).



Survey Key Statistics

The 2021 Global F1 Fan Survey, 2022 Global MotoGP™ Fan Survey and the 2022 Global INDYCAR Fan Survey were commissioned, created and delivered by Motorsport Network and the rights holders between March 2021 and September 2022.

The studies built on Motorsport Network's series of global fan insight programmes initiated in 2005.

Collectively the surveys were constructed, tested and translated into 16 languages; they were each hosted on a dedicated, multi-lingual websites. The fieldwork period for each survey ranged from 19 days for F1, 22 days for INDYCAR and 24 days for MotoGP™.

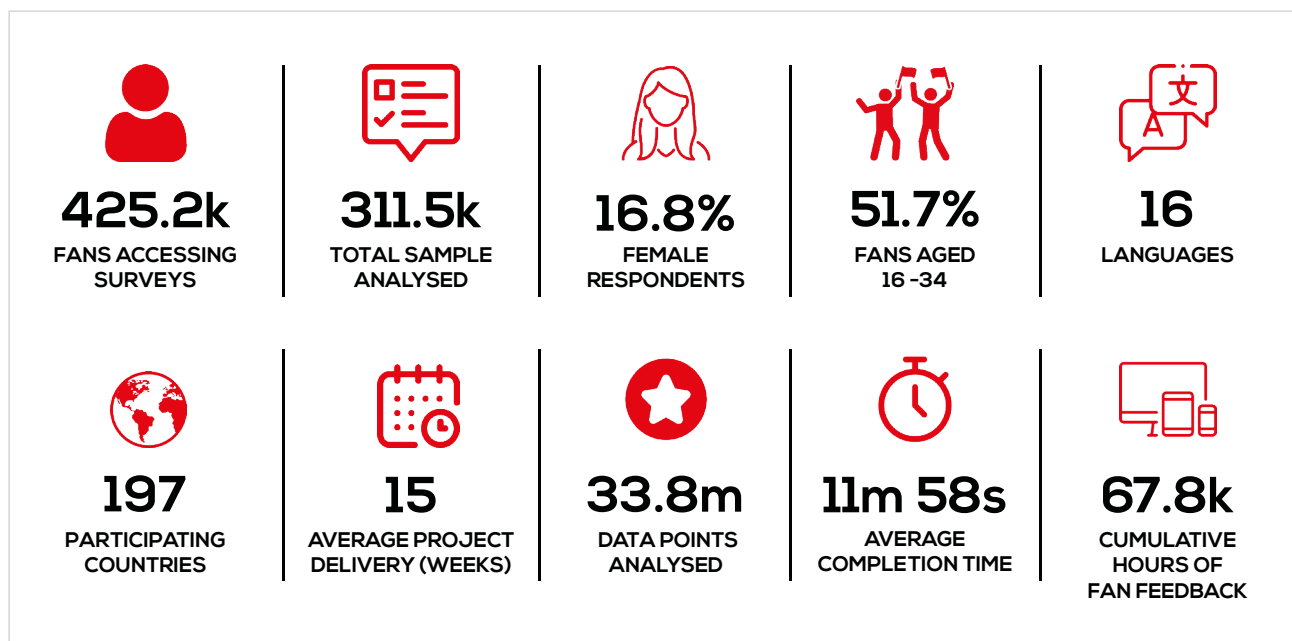
Cumulatively a total of 311,425 individual fan responses were collected and submitted for analysis; the individual survey breakdowns were: FORMULA 1 (148,170), MotoGP™ (109,676) and INDYCAR (53,579)

In each case the sample represented the largest ever study analysed for the respective rights holders.

The Global Fan Survey programme is overseen by Motorsport Network President James Allen. Survey questionnaire construction and testing, data analysis and results interpretation were conducted by industry experts Nielsen Sports, under Nigel Geach. Project planning, co-ordination and report generation were delivered by Ian Burrows of MPA Commercial.

The average respondent completion times for the surveys ranged between 10 and 15 minutes.

The survey process from initial concept to report delivery was completed within 15 weeks per Study.





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Motorsport Network Surveys

If you would like to learn more about the recent individual surveys that Motorsport Network has conducted on FORMULA 1, INDYCAR and MotoGP™ they are available to download on the links to the right of this page. They contain more in depth information on media consumption, race attendance, brand health, competitor popularity, gaming and Esports, with further graphs and tables.

Formula 1® in 2021

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INDYCAR in 2022

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MotoGP™ in 2022

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306 Million

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101 Million

Sessions monthly

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- To create both long and short form formats

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- Align your brand with any race series, team or event via our distribution channels

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- Leveraging our vast audience to showcase your existing content
- Utilising our scale, trust & authenticity to drive awareness of your brand using your own video, social and editorial content to over 62m global motor enthusiasts

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- More than media, our range of assets can help wider business objectives
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