



# MotoGP™ in 2022

Global fan insight into the premier  
motorcycle World Championship

Survey Report

September 2022

**motorsport**  
NETWORK

# With Thanks To

The entire MotoGP™ family and paddock, and everyone involved in making this survey a success, including but not limited to Laia Carrer, Alex Arroyo, Silvia Casas, Carlos Ezpeleta, Ruben Fernandez, Manel Arroyo, Frances Wyld, Gorka Llort and Marc Saurina.

And, of course, our biggest thank you goes to the MotoGP™ fans around the world. 109,676 thank yous to all those who responded to this survey and invested their time in our sport, you are the heart of MotoGP™!

## **Technical Creation & Delivery**

Oleg Safronov, Alena Sukhovetskaya

## **Data Analysis**

Steve Shaw, Nigel Geach

## **Marketing and Design**

Ravi Pankhania, Fabio Donato Di Mare

## **Editor**

Charles Bradley

## **MotoGP™ Editor**

Oriol Puigdemont

## **Project Management**

Ian Burrows, MPA Commercial

## **Imagery**

Motorsport Images/Gold and Goose, Dorna Sports SL.

# CONTENTS

|    |                          |
|----|--------------------------|
| 4  | Foreword                 |
| 6  | Executive Summary        |
| 8  | Methodology              |
| 10 | The Audience             |
| 14 | Brand Health             |
| 18 | Teams & Riders           |
| 22 | The Races                |
| 26 | Future Sporting Changes  |
| 28 | Media Landscape          |
| 32 | Sponsorship and eSports  |
| 36 | Survey Key Statistics    |
| 39 | About Motorsport Network |

# Foreword

**Written by: Carmelo Ezpeleta  
CEO of Dorna Sports**

Dear all,

We couldn't be more grateful for the incredible response to the MotoGP™ Fan Survey undertaken in partnership with Motorsport Network. Seeing such a huge number of fans devote their time to this initiative is an incredible feat in itself, and each and every one of their answers is so valuable to the sport and the future we'll create together.

We knew MotoGP™ was global, but the level of response from so many different countries and markets has been truly exceptional. We race on nearly every continent and we're truly grateful to see that not only do fans flock to the grandstands around the world, they also have an incredible level of investment in our sport – their knowledge, their commitment and their passion are notable in the answers we have received to the survey.

We have some of the closest racing in the world, we have an incredibly healthy grid and we maintain high levels of interest from new partners, new factories, new media platforms and new circuits and promoters around the world, but as is the DNA of our sport, we always want more. With the help of our fans around the world we are confident we can create the brightest possible future for MotoGP™.

92% of our fans have told us they are avid followers of the sport, which is the highest number ever recorded in similar surveys. That makes us incredibly proud to hear. Their reviews of the competition are equally overwhelming, with 94% of responses saying the racing is exciting – and nearly as many considering MotoGP™ the pinnacle of motorsport.

Support for future initiatives we already have in motion is another source of pride. MotoGP™ will be powered by 100% sustainable fuel from 2027, and fans were overwhelmingly in favour of this new global era of zero carbon fuels. We also saw a positive reflection in so many other areas of focus as we continue to push to grow our sport around the world, with female fans in particular not only a growing demographic but also an incredibly committed one – the most likely group, by percentage, to watch the most races per season and to attend a race weekend in person.

As we continue our mission to grow the sport and open its doors to all people, audiences and countries around the world, we are committed to reflecting everything we've learned from this survey in the decisions and directions we take going forward.

On that note, the biggest thing we have learned is that our fans are all along for the ride. They too want to see the sport grow, welcome new audiences and see the competition on track go from strength to strength. They value what we have built and will be with us as we continue to push boundaries to make the sport even better than before, racing together.



**Carmelo Ezpeleta, CEO of Dorna Sports**



# Executive Summary

**Written by: James Allen**  
**President Motorsport Network**

---

The results you will read across the pages of this first ever Global MotoGP™ Fan Survey show a sport with very strong fundamentals and a loyal, dedicated fan base. It also shows how the sport is growing among key demographics, like younger female fans and in geographies outside the European heartland.

We were delighted to see responses from over 109,000 fans in 179 countries, a truly remarkable global response. Italy, France, UK, Spain and USA lead the way on responses. The European audience made up 65% of the total, with 19% from Asia and 13% from the Americas.

So what are some of the key call-outs from the survey that I would direct you towards? First, the series has built a very loyal fan base with over 82% of fans following the sport for over six years, the highest of any series studied in Motorsport Network's Global Fan Survey programme. And 65% of fans have been following the sport for more than ten years. Fans invested a total of 27,300 hours completing this survey, which reflects their desire to make their voices heard. I would also highlight that these fans are highly qualified to comment, as over 40% of them have attended a race in the last five years.

MotoGP™ is attracting new female fans, one-third of whom have been following the sport for less than five years. Female respondents were also significantly younger than their male counterparts with 56% of female fans aged 16-34; compared to 40% for male fans. However, a significant percentage (66%) of fans still believe that the sport needs to do more to attract new fans.

Fabio Quartararo, Marc Marquez and Francesco Bagnaia emerged as the top three favourite riders, while Monster Energy Yamaha and Ducati Lenovo were neck and neck for the favourite team, with Repsol Honda in third place.

One of the signature elements of the Global Fan Survey programme is the attention given to understanding how fans feel about the sport's defining qualities; the brand attributes, as we call them. Dorna will be delighted to see that fans identified the top five brand attributes of MotoGP™ in the survey as follows: Exciting, Competitive, Entertaining, World Class and Unpredictable, with 94% of fans saying that the sport provides exciting racing, 79% calling it the world's most exciting racing and 71% saying that it features pioneering technology.

There is rich data on fan attendance at races, favourite venues, attitudes to new technology and sustainability, sponsorship, gaming, eSports and much more in this report. I hope you enjoy reading it and get something beneficial from it.

Over the past year at Motorsport Network, together with Nielsen Sports, we have conducted major surveys for three series at the pinnacle of world motorsport; Formula One, INDYCAR and MotoGP™ and all three show that motorsport is in good health at the elite level, with strong fan demand and plenty more room for growth in attracting new fans by mastering digital and social media and communicating with younger fans where they are. Dorna can use this valuable fan insight like a compass for shaping the MotoGP™ of the future. Thanks to each and every fan, wherever you are in the world, for taking the time and the care to contribute. We look forward with great interest to seeing where all these indicators will be pointing when we return to the next Global MotoGP™ Fan Survey in a few years' time.

**James Allen, President Motorsport Network**



# Methodology

**Written by: Nigel Geach  
SVP Global Motorsport, Nielsen Sports**

---

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, Nielsen Sports worked with Motorsport Network and MotoGP™ to engage the global fan base in the most comprehensive survey ever conducted among MotoGP™ fans.

The 2022 Global MotoGP™ Fan Survey is the first such endeavour by the sport and was created and translated into fourteen languages and hosted via a common, multi-lingual website. Over the three and a half week fieldwork period in June/July 2022, a massive 126,896 fans across 179 countries shared their feedback on an array of topics. Nielsen Sports conducted detailed analysis of 109,676 individual fan responses to compile this exhaustive report.

The viewpoints provided and insights delivered from the fans help set a benchmark for MotoGP™. Through Nielsen Sports' expertise in surveying fans across over 2,000 sports leagues and teams globally, our benchmarks and data norms have been used to contextualize MotoGP™ fandom.

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 MotoGP™ fans now and in the future can only serve to strengthen the sport moving forward in the coming years.





# The Audience

**The largest MotoGP™ fan survey ever reveals a globally-engaged, loyal and passionate audience.**

- Research sample of 109,676 fan responses analysed from 179 countries
- Top five countries by response were Italy, France, UK, Spain and USA
- 92% of fans identify as ‘Avid’ followers – the highest percentage ever recorded in a Motorsport Network Global Fan Survey
- Over 13,500 female fans responded – 13% of the total sample – female response is highest in Europe and Asia-Pacific
- MotoGP™ has built a very loyal fan base with over 82% following the sport for over six years
- Average age of respondents was 36 years 4 months. With 45% of fans in Europe & Asia - Pacific aged under 35 & over 56% of female fans aged under 35
- MotoGP™ fans actively follow other motorsport series including WorldSBK and Formula 1

## Largest ever MotoGP™ Fan Survey

Research is only as credible as its respondents and we are delighted to reveal that the findings of the first 2022 Global MotoGP™ Fan Survey are based on the largest, most balanced, global sample ever captured. The audience totalled 109,676 worldwide from 179 countries.

The survey was created by Motorsport Network and Dorna Sports, the sole commercial and television rights holder of MotoGP™. It was translated into fourteen languages and hosted via a common, multi-lingual website. Research was conducted over a 25-day fieldwork period from June 16 to July 10, 2022. The total sample made available to Nielsen Sports, our expert research partners, for analysis was 109,676. Average completion time for the survey was 14 minutes, 56 seconds, showing a high level of dedication from fans to make their voices heard. Detailed demographic analysis of responses was conducted by age, gender, geographic region and interest level. Additional analysis was conducted on responses from the top 20 global markets.

We are delighted to report a number of highlights from this first-ever global study that give an insight into the composition of the MotoGP™ audience.

## Largest-ever sample size and high engagement

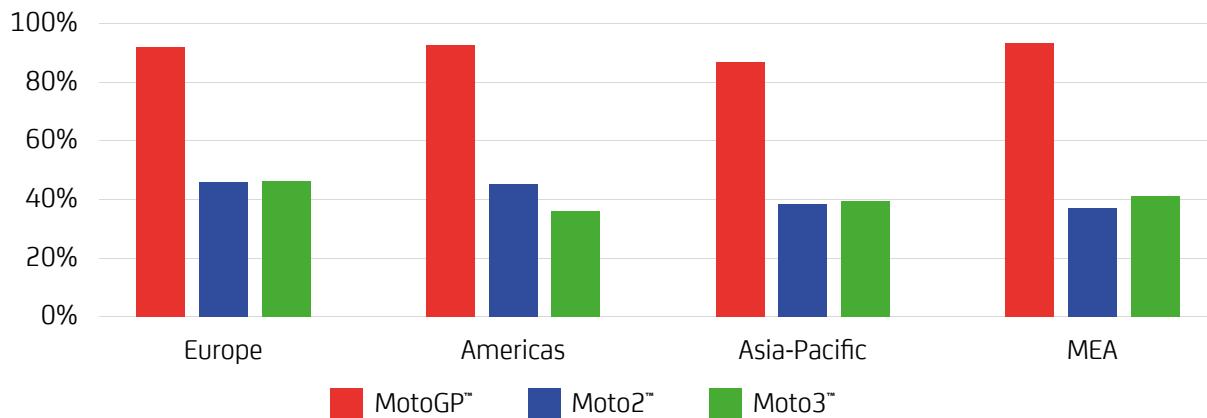
While research samples in excess of 1,000 respondents are considered statistically robust, the overall sample of 109,676 exemplifies the desire and dedication of MotoGP™ fans to commit significant time and effort to voice their opinion on the sport they love. Fans invested a cumulative total of over 27,300 hours completing the survey.

## Wide geographic spread

Responses were received from fans in 179 countries worldwide, from all continents and provide a truly global reach. Although we saw an obvious weighting towards Europe, the traditional heartland of MotoGP™, the European audience made up just 65% of the total response. Over 31,000 responses were received from fans in the Americas (13%) and Asia-Pacific (19%). Fans in Africa and the Middle East accounted for 3.4% of the total sample.

The MotoGP™ fan base is younger in Europe and Asia-Pacific than the Americas, with more than half of all respondents outside of the Americas coming from millennial and 'Gen Z' age groups – which presents MotoGP™ with clear long-term growth opportunities.

**Chart 1.1 | Fan Interest in MotoGP™ Championship**



### Strong female participation

More than 13,500 responses were recorded from the female fan base, accounting for over 13% the total sample. This is the second largest percentage from any survey of a global racing series conducted by Motorsport Network since 2015. Female participation was lowest in the Americas at 8%, rising to 14% in Europe and topping 16% in Asia-Pacific. The female fans are more typically found in the younger age bracket.

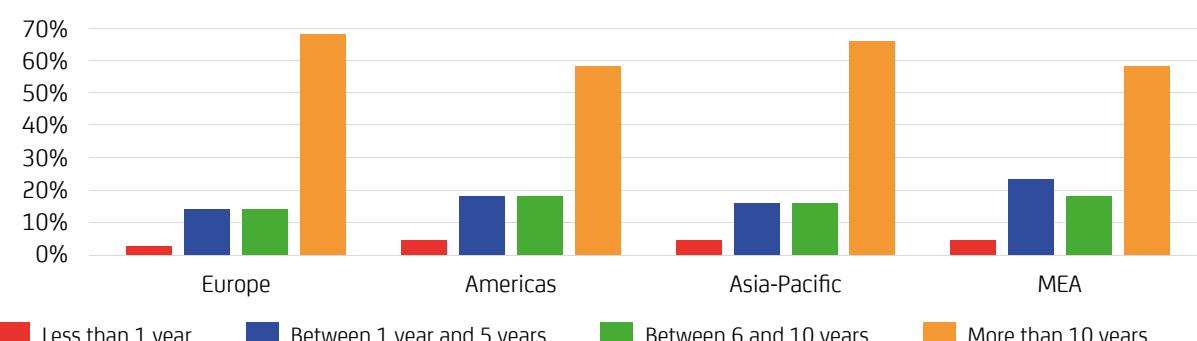
### Good age demographics

The 2022 survey attracted an audience with an average age of 36 years, 4 months. Regionally, we witnessed a trend of younger and newer fans in Europe and Asia-Pacific where 45% and 47% respectively of respondents were under 35, compared to 36% in Middle East & Africa and 23% in the Americas. Female respondents were also significantly younger than their male counterparts with 56% of female fans aged 16-34; compared to 40% for male fans.

### A loyal and growing audience

One notable conclusion from the survey is that MotoGP™ enjoys a very loyal audience, especially in Europe and Asia-Pacific, where over 65% of fans have been following the sport for more than ten years, while over 80% of fans have followed it for six years or more. In keeping with the trend for female fans to skew younger, over one-third of female fans have been following the sport for fewer than five years.

**Chart 1.2 | Length of Following MotoGP™ by Region**



## A passionate and dedicated audience

92% of fans responding to the survey self-selected as “Avid” MotoGP™ fans. This is the highest percentage recorded for any global Motorsport Network Fan survey to date. Interest was high across all regions: interestingly the Middle East & Africa recorded the highest level of “Avid” support at 94%. The commitment also extends to the smaller categories, Moto2™ and Moto3™, where “Avid” interest was also strong at 44% globally, rising to 47% in Europe.

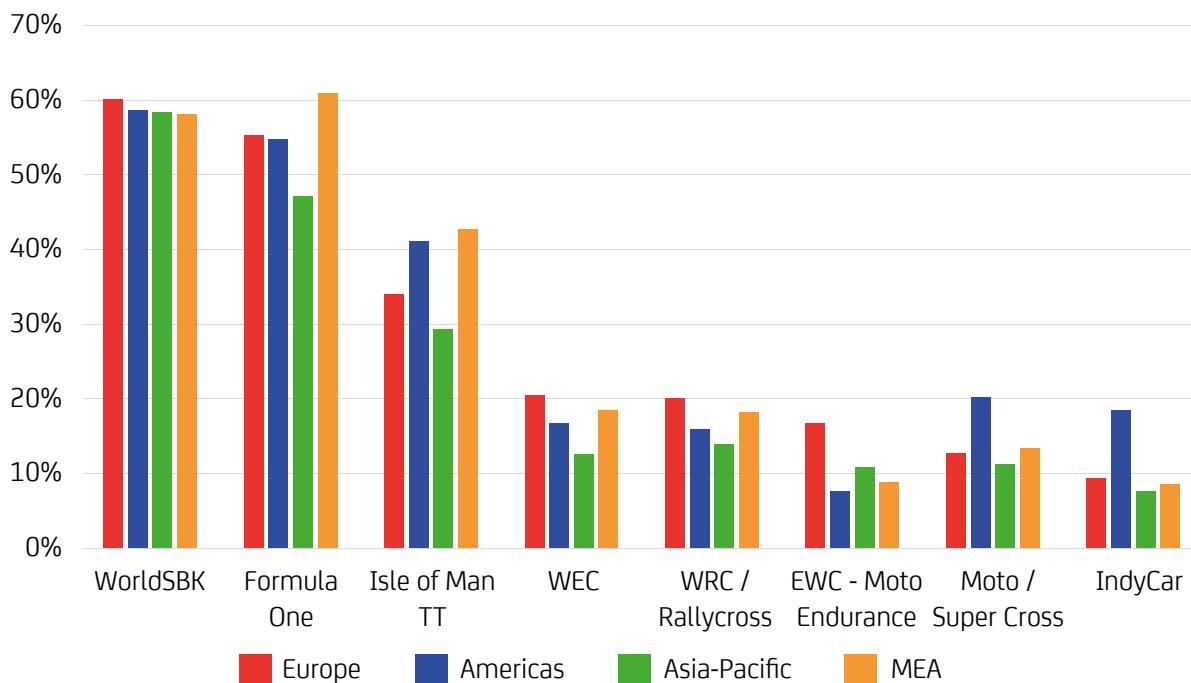
In common with all previous motorsport studies conducted by Motorsport Network and Nielsen Sports, the survey attracted the greatest level of response from Avid fans (92%) – this is not unsurprising given that promotion was predominantly featured on motorsport-centric digital and social media platforms. The average completion time was 14 minutes 56 seconds, a significant commitment on the part of respondents.

MotoGP™ fans follow a mix of other motorsports; WorldSBK is particular strong among male fans aged 44+. Formula One is strongly followed by 56% of the MotoGP™ audience and is particularly popular among younger, male fans.

The popularity of Formula One among MotoGP™ fans mirrors the growing appeal of MotoGP™ with Formula One fans recorded in the 2021 Motorsport Network Global F1 Fan Study.

The only other sport followed by more than 30% of MotoGP™ fans is UEFA Champions League, driven by younger, male European fans.

**Chart 1.3 | Other Motorsport Series Followed by Region**





# Brand Health

MotoGP™ brand health is very strong, with over 84% of fans viewing it as the pinnacle of motorsport and highlighting generally positive brand attributes.

- MotoGP™'s most voted attributes are: Exciting, Competitive, Entertaining, World Class and Unpredictable
- Fans provided a very clear picture of what are the distinctive qualities of MotoGP™:
  - Exciting racing – 94%
  - On-track action – 91%
  - Close competition – 91%
  - Feature the world's best riders – 90%
- Fans believe that MotoGP™ is delivering across all these key measures:
  - Features the best riders – 85%
  - Is the pinnacle of motorsport – 84%
  - Is the world's most exciting motorsport series – 79%
  - Is unpredictable – 71%
  - Has the right balance of entertainment and sport – 70%
- Positive MotoGP™ brand sentiment is strongest among female fans and those aged 16-34
- Over 80% of fans believe the championship must feature the world's leading manufacturers and fastest machinery
- However, a significant percentage (66%) of fans believe that the sport needs to do more to attract new fans

---

## Fans positive about what MotoGP™ stands for

One of the most significant data points we analyse for race championship in the Motorsport Network Global Fan Surveys is the response from audiences on how they feel about their sport. What adjectives would they use to describe the sport as it is today? This is essentially a 'health check' for the championship, to ensure that it is delivering what the fans actually want from their sport.

Is the championship in better or worse health than three years ago? What adjectives would the fans choose to describe the sport as it is today? And, just as crucially, as the sport tries out new rules and changes to improve the show, do fans feel that the balance is right between sport and entertainment? We are pleased to report that the brand health

response in the first Global MotoGP™ Fan Survey response has been largely positive.

## MotoGP™ Brand Attributes

The top brand descriptors are:

**Competitive** **Technological**  
**Dynamic** **Exciting** **Cool** **Fun**  
**Innovative** **Dangerous**  
**Courageous** **Entertaining**  
**World class** **Unpredictable**  
**Expensive** **Prestigious** **Iconic** **Global**



Fans were also asked to highlight key features that make the sport most appealing – a blueprint acting as an invaluable guide for shaping the future.

MotoGP™ fans display a ‘track-first’ approach to the sport’s key deliverables; the most important elements for fans are exciting racing, close competition, lots of on-track action and overtaking among the best riders on the fastest racing bikes on the planet - built by the finest manufacturers using pioneering technology.

**The most important features for fans were identified as:**

- 94%** - Has exciting races
- 91%** - Has lots of overtaking and on-track action
- 91%** - Features close competition
- 90%** - Features the best riders
- 82%** - Features leading manufacturers
- 79%** - Features the fastest machinery
- 79%** - Is unpredictable
- 71%** - Features pioneering technology
- 70%** - Has lots of different race winners

Fans are in strong agreement that MotoGP™ is currently delivering on a number of these key attributes.

**Strong net agreement (+70%) is seen for the following:**

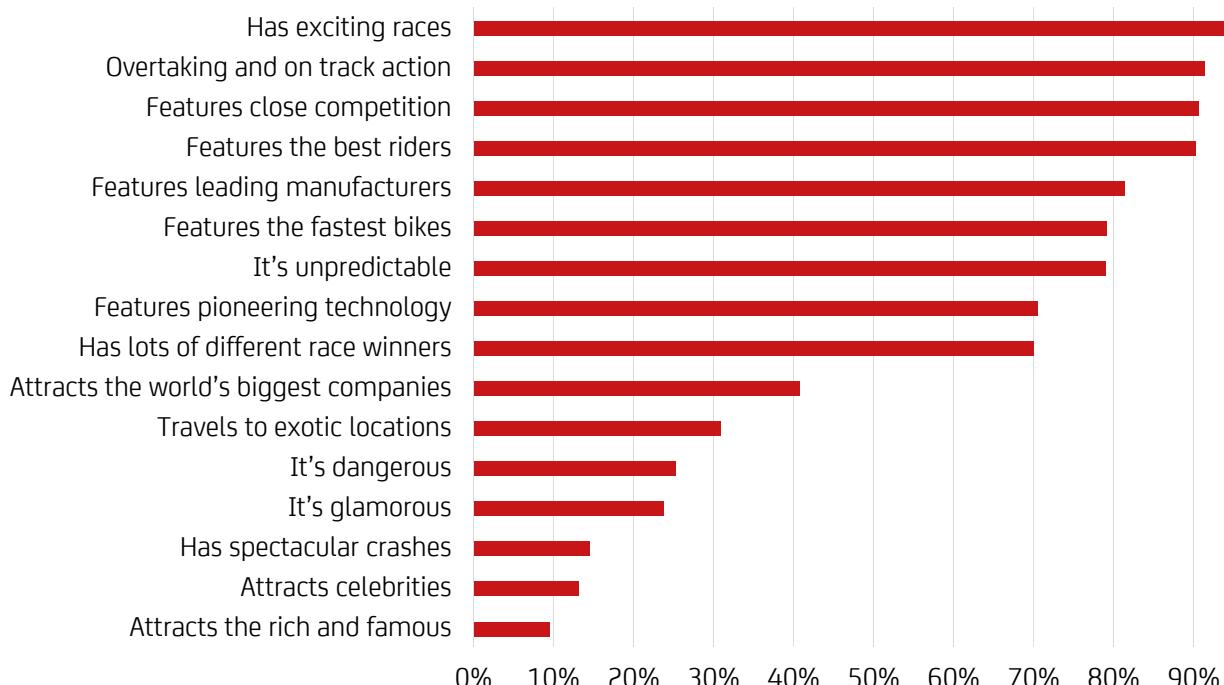
- 85%** - MotoGP™ showcases the best riders
- 84%** - MotoGP™ is the pinnacle of motorsport
- 78%** - MotoGP™ is the world’s most exciting motorsport series
- 71%** - MotoGP™ is the most unpredictable series
- 70%** - MotoGP™ has the right balance of sport and entertainment

Support for MotoGP™’s delivery against key attributes was consistent across all geographic regions and strongest among female fans and those aged 16-34.

While overall fan opinion of MotoGP™ is extremely positive, two-thirds (66%) of fans do highlight the need for the sport to continue to attract new fans, and this is especially important to fans aged 16-34.

In terms of sustainability, nearly half (43.5%) of all fans believe MotoGP™ should continue to develop technologies that benefit the environment beyond the race track. This sentiment is strongest among younger fans aged 16-24 and those in Asia-Pacific, Middle East and Africa.

**Chart 2.1 | Key Features Driving Appeal for MotoGP™**





# Teams and Riders

MotoGP™ fans are non-tribal with over three-quarters (77%) supporting a number of Teams & Riders. However, strong national and regional support was recorded for both Riders and Teams.

- MotoGP™ fans are overwhelmingly ‘sport-first’ with over 75% supporting a number of teams and riders
- Female fans and those aged under 24 are more likely to follow a single rider
- Factory squads from Yamaha, Ducati and Honda dominate the Team Rankings, with Monster Energy Yamaha ranked the #1 favorite team, Ducati Lenovo #2 and Repsol Honda at #3
- Fabio Quartararo is MotoGP™’s most popular rider in the Global Fan Survey, closely followed by Marc Marquez. The third most popular rider is Francesco Bagnaia, followed by Jack Miller in 4th

## MotoGP™ is mainly non-tribal

MotoGP™ engages fans on a sport-first basis. In sharp contrast to most team-based sports, the majority of its fans are not overtly tribal in their support.

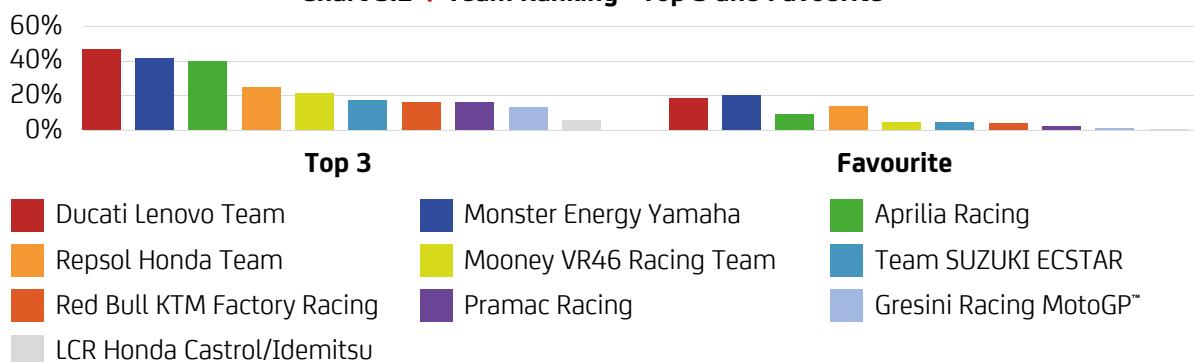
Nearly two-thirds (63%) of fans support a number of teams and riders, and 14% are impartial to all competitors. Only 17% of fans support one rider and less than 6% of fans follow one team above all others. Perhaps remarkably, over 15% of fans do not have a favourite team.

### Teams

Reigning World Champions Monster Energy Yamaha and Ducati Lenovo polled within 1% of each other across most demographics – age, region and level of interest. A key differentiator in establishing themselves as the overall #1 ranked team is Yamaha’s 6% higher popularity among female fans.

Ducati features in the top 3 teams for nearly half of all respondents (48%); with strong support also seen for Yamaha (42%) and Aprilia (40%). However, when fans were forced to indicate their #1 team, Yamaha polled stronger than Ducati among younger and female fans; this ultimately allowed it to rank as the #1 most popular MotoGP™ team by 1.4% from Ducati – 20.4% versus 19.0%.

**Chart 3.1 | Team Ranking - Top 3 and Favourite**





I UNITED FOR PEACE



MSMA

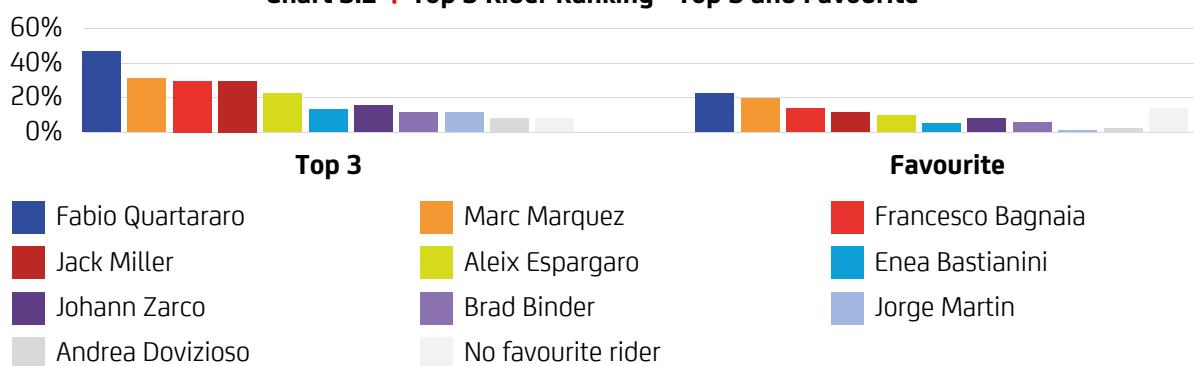
Dorna

While Repsol Honda is only placed in the top 3 by 25% of fans, its supporters were more loyal with 14% of fans voting it as their #1 team. Honda is also more popular among female fans, with 19% placing them as their favourite team; putting it #2 worldwide among female fans; less than 2% behind Yamaha.

Aprilia Racing enjoyed widespread support with 40% of fans placing them in their top 3; but this fell back to 10% when fans were asked to indicate their favourite team.

Monster Energy Yamaha is the #1 ranked team in France, Indonesia, Japan, India and South Africa; Ducati Lenovo is the most popular team in Italy and Australia, with Repsol Honda the most popular in Spain. Highlighting the ‘sport-first’ approach, ‘no favourite team’ is the #1 ranked choice for fans in UK, Germany and Portugal.

**Chart 3.2 | Top 3 Rider Ranking - Top 3 and Favourite**



## Riders

In common with previous studies conducted by Motorsport Network, support for MotoGP™ riders is significantly impacted by nationality.

Overall, reigning champion Fabio Quartararo is MotoGP™’s most popular rider – he featured in the top 3 of nearly half (49%) of all fans, rising to 56% among female fans. He is the most popular rider with 21.8% of all fans placing him at #1. His support is highest among female fans and those aged 16-34. He is the #1 ranked rider in France, UK, Germany, Indonesia, the Netherlands and Argentina.

Marc Marquez is MotoGP™’s second most popular rider – while he only featured in the top 3 for 32% of all respondents, a high percentage of these fans also place him as their favourite. Globally, he is ranked #1 favorite rider by 19.8% of all fans; like Quartararo his support is stronger among female fans, and he is ranked #1 rider among fans aged 24-35. He is ranked #1 most popular rider in Spain, USA, India, Poland, Austria, Brazil and New Zealand.

The combination of Quartararo and Marquez feature in over 80% of all fans’ top 3 riders, rising to 96% among female fans and, between them, they are ranked #1 by over 40% of all fans.

Italy’s Francesco Bagnaia is ranked #3 in terms of popularity among fans worldwide; he features in 29% of fans’ top 3 and was voted #1 favourite by 11% of all respondents. He is voted #1 by 38% of fans in Italy.

Australia’s Jack Miller is the #4 ranked most popular rider worldwide with 9.4% of fans ranking him as their favourite; this is in large part driven by his #1 status among 54% of all Australia fans; he is also popular in the UK with 16% of fans ranking him #1.

Spain’s Aleix Espargaro is MotoGP™’s fifth most popular rider with 5.4% of fans placing him at #1.

Johann Zarco is ranked #6 most popular rider, thanks in part to 26% of all fans in France; followed by Brad Binder who was ranked #1 by 59% of all South African fans. Miguel Oliveira is MotoGP™’s 8th most popular rider and was unsurprisingly voted #1 favourite among 82% of all Portuguese fans.



# The Races

**MotoGP™ fans are keen race attendees, with over 40% having attended a live event in the past five years. 24% of fans have travelled to attend a non-domestic round of the championship – this is double the levels witnessed in Formula 1 Global Fan Surveys.**

- Over 40% of MotoGP™ fans have attended a race since 2016, with 24% travelling to a non-home GP in the past five years
- The Dutch GP in Assen is the most attended race over the past five years (24%), very closely followed by Mugello (23%), Misano (22%), Catalunya (22%) and Valencia (20%)
- Over 60% of all MotoGP™ fans consider the Italian GP at Mugello critical making it the #1 ranked race among fans; Assen (48%) and Phillip Island (37%) also scored strongly
- Nearly three-quarters of fans (74%) believe the MotoGP™ calendar should feature 19 or more races, with over half (52%) favouring a 19-21 race season
- For race hosts the key venue attractions for fans are:
  - Good race viewing areas – 92%
  - Ease of parking – 70%
  - Pit Lane – 69% & Paddock Tours – 67%
  - Rider Fan Zone appearances & covered spectator areas – 59%
- Preferred race day ticket price is between \$80 - \$120

---

Taking into account the impact of COVID-19 over the last two seasons, MotoGP™ fans are twice as likely to attend a race than fans in Formula One. Over 40% of all respondents have attended a race in the past 5 years and 23.6% of fans travel 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 five years. Race attendance in the past five years across Europe is strong, in spite of the impact of the COVID-19 pandemic.

Across Europe, fans attended in significant numbers – aside from the Netherlands, the percentage of fans attending their ‘home’ race since 2016 is Austria (68%), Spain (62%), UK (52%), Germany (50%) and France, Italy & Portugal (48%). Home race attendance is also high in Argentina (60%), Australia (48%), Japan (46%) and the USA (43%).

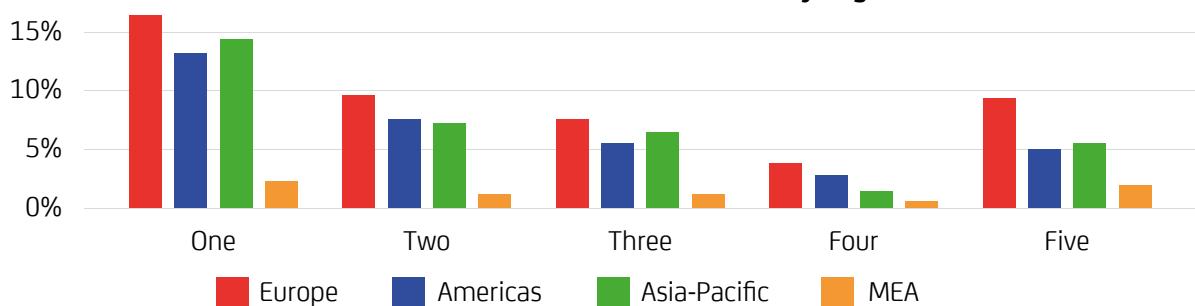
International race attendance is also significantly higher than comparable data from Formula 1. Globally, 24% of fans have attended a non-home GP since 2016. Again, the European audience ranked highest in terms of travelling to a race – over half (51%) of all Belgian fans had travelled to a race, together with Germany (38%), Austria (33%), Poland (30%), France (29%), UK (28%) and the Netherlands (26%). Outside of Europe, high percentages of fans from countries without a home race – led by New Zealand (36%) and Brazil (30%) – travelled to a MotoGP™ event in the past five years.

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 five years. Races in Spain and Italy were also well attended by fans – Mugello (23%), Misano (22%), Catalunya (22%) and Valencia (20%).

The Dutch GP has been attended by 94% of Netherlands MotoGP™ fans in the past five years, they were joined by 76% of Belgian fans, and 43% of German fans.

Along with the Netherlands, high home race attendance was also witnessed in Argentina, where 94% of fans have attended Termas de Rio Hondo; in Portugal, where 86% of fans have attended Portimao; in the US, where 86% have attended COTA; in Australia, where 85% of fans have attended Phillip Island; the UK, where 83% have attended Silverstone; in France, where 78% of French fans have attended Le Mans; in Germany, where 76% have attended the Sachsenring; in Spain, the figures are Jerez (64%), Valencia (56%), Catalunya (54%) and Aragon (47%); in Italy, the numbers are Mugello (48%) and Misano (45%).

**Chart 4.1 | Home Attendance Since 2016 by Region**



Female fans are 20% more likely to have attended a race in the past five years, with 48% of all female fans having attended at least one race since 2016 compared to 40% among male respondents. Female fans are also more likely to attend a non-home GP, with 26% doing so since 2016. Older fans aged 44+ were also more likely to attend an overseas race.

In terms of future potential additions to the MotoGP™ calendar, there is strong support for a round in Belgium, with 33% of fans wanting a race to be held there in the future. Brazil and South Africa are also popular new destinations, driven by huge local support: 98% in Brazil and 97% in South Africa.

### The Perfect Calendar

Nearly three-quarters of all fans (74%) believe that MotoGP™ should feature more than 19 races in a season, with 52% of fans preferring a 19-21 annual race calendar.

Based on fan appeal, the 10 most important MotoGP™ races each year are: Mugello, Assen, Phillip Island, Jerez, Misano, Le Mans, Catalunya, Sachsenring, Silverstone and COTA. There remains strong support for a race at Laguna Seca in the United States, with 22% of fans considering this a critical event for MotoGP™ to make a return.

**Chart 4.2 | Fan Ranking - Most Important Races (Top 10)**



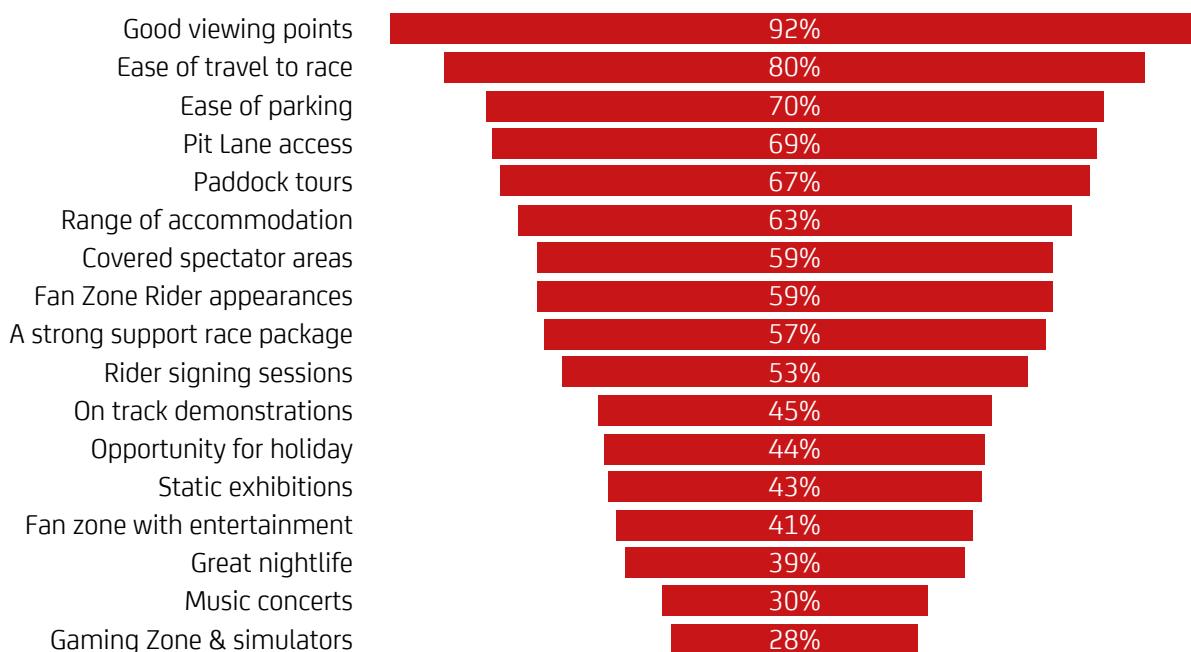
## Race Promoters' Guide – Key Features

With such an active attending audience and the growing appeal to travelling international fans, MotoGP™ events are likely to attract significant event attendees – driving competition among individual host venues to capture fan support.

With nearly 45,000 respondents to the Survey having attended at least one race in the past five+ years, their feedback provides race promoters with an invaluable insight into key event features, as well as pricing information to drive increased attendance for the future.

The table below illustrates the relative importance of event features in attracting fans, the most important factors being:

**Chart 4.3 | Key Considerations for Race Attendance**

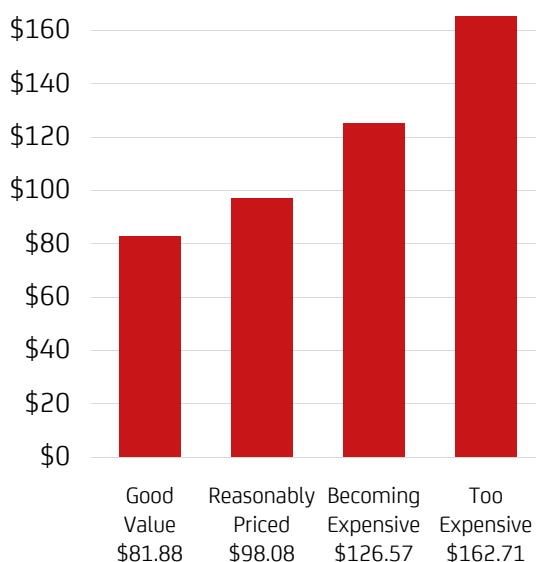


## Race Promoters' Guide – Ticket Pricing

We asked fans to state the price point at which different ticket options were viewed as 'Good Value' and 'Reasonable' as well as the point at which they became 'Expensive' and 'Too Expensive'. We used a benchmark of a MotoGP™ Race Day General Admission Adult Ticket, with fans asked to state their opinion in their choice of currency.

Responses were collated and converted into a standardized € and US\$ measure based on prevailing exchange rates:

**Chart 4.4 | Preferred Race Day Ticket Pricing**





# Future Sporting Changes

MotoGP™ fans are happy with the current sporting format and are not keen to see any big changes to the composition of a race weekend.

- Fans do support:
  - Balance of Performance rules to improve competitiveness
  - The introduction of sustainable fuels
  - The introduction of multiple tyre suppliers
  - Standard race formats for all MotoGP™ events
  - Activities to increase the profile of MotoGP™ riders
  - Regulations to improve the efficiency and performance of machinery
- Fans appear undecided regarding:
  - Points for Fastest Lap
  - Introduction of regulations to improve overtaking
  - Introducing more floodlit races – although support is stronger in the Americas
- Fans don't support:
  - Awarding points for Qualifying
  - Qualifying Sprint races to establish the MotoGP™ grid on Sunday
  - Increased coverage of Moto2™ and Moto3™
- 85% of fans want races to last between 40 minutes and 1 hour; with 70% preferring a race length of 40-50 minutes (which mirrors the existing race length)

---

MotoGP™ fans were asked about a number of potential sporting changes to potentially enhance the spectacle.

## **Very Strong fan support (+35% net approval)**

Rules to balance performance of less competitive manufacturers has benefited the sport (+60%), including a particularly positive reaction among younger fans (16-34). Introduction of sustainable fuels is a positive move for MotoGP™ (+46%), with strong support among female and younger fans (16-34). All events to feature the same format (+43%) and introduction of more than one tyre supplier (+38%).

## **Strong fan support (+15% net approval)**

Introducing rules to improve efficiency and performance of race machinery (+32%).

Introduce regulations to allow for more overtaking (+28%). Activities to raise the profile of riders (+27%). Award points for Fastest Lap (+18%).

## **Strong Negative fan reaction (up to -20% net approval)**

Feature more races under floodlights (-7%). Qualifying Sprint races to establish the MotoGP™ Grid (-15%). Awarding points for Qualifying (-19%).

## **Very Strong Negative fan reaction (up to -60% net approval)**

Leave riders free to race with less penalties (-26%). Feature more Moto2™ & Moto3™ coverage (-49%).



# Media Landscape

**Television, digital and social media lead the way for fans accessing MotoGP™ content – with TV the most-used and favoured device for race viewing. The official MotoGP™ website and app also have a strong following, especially among female and American fans in particular.**

- 82% of fans watch more than 15 races out of a total of 20 per season
- Over three-quarters (76%) of fans frequently watch live races, with 56% also watching Qualifying. Frequent viewing rises to over 80% for fans in Europe, Middle East & Africa
- Frequent race viewing is highest among female fans (83%) and those aged 45+ (79%)
- TV is the most-used (90%) and preferred device (82%) for accessing MotoGP™ content
- Over 90% of fans watch the full race, with nearly two-thirds (64%) watching pre-race build up and post-race analysis
- Live Race content is critical for almost all fans across every demographic (97%+), closely followed by Qualifying (89%)
- Frequent usage of the official Videopass via the MotoGP™ app is high at 41% worldwide; rising to 57% in the US
- Over three-quarters (77%) of fans are aware of MotoGP™ Unlimited on Amazon Prime, over 40% of fans have watched some or all of the docuseries

---

## Analysing media consumption by platform

Perhaps the fastest changing aspect of any global sport is how the fans access the sport via the media and their evolving consumption habits. For this reason it is vital for a series to understand what content fans are consuming, how and where they are consuming it and what platforms they want to watch races on in the future.

This survey reveals that television – both Pay and Free-to-Air – is still the most-used platform for fans to follow MotoGP™ news and information during race weekends with over 60% of fans tuning in. Specialist motorsport media (46%) and social media (45%) are the next most-used platforms over the race weekend.

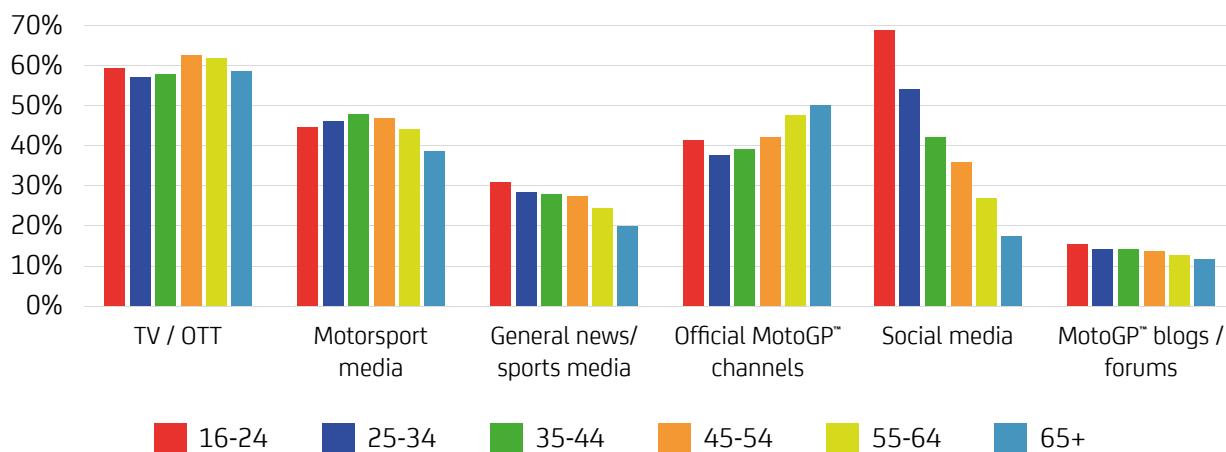
TV viewing is at its highest in Austria (82%), Japan (79%), Germany (79%) and Italy (71%). TV race weekend viewing is lowest in Canada (23%), USA (29%) and New Zealand (36%).

Outside race weekends, specialist media platforms and social media are the most-viewed platforms for information – with social media (41%) narrowly edging specialist motorsport media (37%) as the number one most-used channel for content.

Interestingly social media usage is more than 50% higher among female fans, both during and outside of race weekends.

Over a race weekend Instagram is the number one most used social media platform, driven by particularly high (75%+) usage among female fans and those aged 16-24. YouTube is the #2 most-accessed social media, with half of all fans accessing the platform for content over a race weekend.

**Chart 5.1 | Media Frequently Accessed During Race Weekend by Age**



#### Fans commit a significant amount of time to MotoGP™

82% of fans watch more than 15 races per season, rising to 84% among female fans and 86% among the over-45 age group. Over 90% of fans watch at least 13 races per season.

Live Race viewing is the most avidly-consumed content with over three-quarters (77%) of fans regularly consuming live race broadcasts. Qualifying is also well supported, with 57% of fans regularly accessing live coverage.

It is notable that MotoGP™ fans are prepared to commit significant time engaging with the sport; nearly 90% of fans watch the entire race from lights to flag, of whom 64% of fans will also watch the preview show and post-race analysis. Older fans aged 45+ and female fans are most likely to watch the full race plus additional pre- and post-race coverage.

While over 70% of global fans are happy with the current race start times, there is a major difference in opinion between regions. In Europe, Middle East & Africa over 80% of fans are happy with the timings; in Asia-Pacific where less than half (49%) are happy and the Americas where only 38% are happy. Across Europe, over 80% of fans find the race start time convenient; meanwhile 30-32% of fans in the US and Canada, and 12% in New Zealand would like race start times to move closer to their time zones for convenience.

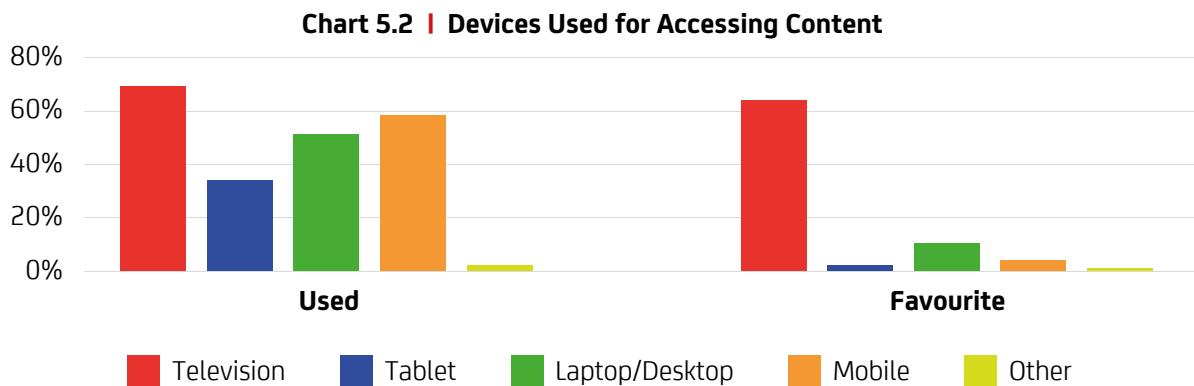
#### Fan consumption on Official MotoGP™ platforms

There is a large audience of fans accessing Official MotoGP™ media with 41% of fans frequently use MotoGP™ digital and social media platforms. Usage of MotoGP™ channels is noticeably higher in the Americas (58%) and Middle East & Africa (49%).

Two-thirds of fans within the US access the MotoGP™ VideoPass during a race weekend. Both during and outside of the race weekend, VideoPass is viewed by four times as many fans in the Americas as it is in Europe.

Awareness and recognition of the eight-part MotoGP™ Unlimited docuseries Season One on Amazon Prime is reasonably high, with over 75% of fans being aware of the programme. However, globally, viewing of MotoGP™ Unlimited is particularly high in Canada (51%), USA (50%), Spain (48%) and Germany (40%). MotoGP™ fans access content on a variety of media devices, with TV proving to be by far the most popular (90%), followed by mobile (58%) and laptop (49%).

Both mobile and laptop viewing is higher among 16-34 age groups. However, fans expressed a very clear preference for future viewing on TV (82%) compared to laptop (10%) and mobile (4%), a pattern we have seen with other motorsport series surveyed recently. Fans in Asia-Pacific have the highest preference for viewing via mobile, with 10% of fans stating this as their preferred future viewing device.



### Impact of Pay TV

In common with a number of elite international motorsport championships, the last decade has seen a shift towards live race coverage on Pay TV. The introduction of Pay TV has led to some change in fans' viewing behaviours; however for most MotoGP™ fans (57%) there has been no impact on their viewing habits; this is consistent picture across all age demographics and regions. Analysing comparable data from studies in Formula 1 and Indycar we observed that MotoGP™ fans are less likely to have changed their viewing habits based on the switch to PayTV.

The study did show that the reasons why MotoGP™ fans are now consuming more content due to the switch to PayTV are:

- Increased quantity of content (29%)
- Increased quality of content (28%)
- The ability to stream content (27%)
- More coverage online (9%)
- Other reasons (7%)



**Fabio Quartararo, Monster Energy Yamaha,**  
Copyright © Dorna Sports SL.



# Sponsorship and eSports

For the final section of our 2022 MotoGP™ Global Fan Survey we look at fans' attitudes to sponsorship and eSports.

- MotoGP™ fans think more highly of companies & brands sponsoring the championship
- 41% of all respondents are gaming at least once per week, with 14% playing daily
- Weekly gaming increases to 66% among 16–24-year olds and over 50% among 25-44 year olds
- Nearly three-quarters (73%) of fans regular play console-based titles with Sony PlayStation the most utilized device (44%)
- eSports participation is highest in Europe at 55%, followed by Asia-Pacific at 52%
- The top 3 most played titles among MotoGP™ fans are:
  - MotoGP™
  - Formula One
  - Grand Theft Auto

---

## Strong crossover of MotoGP™ fans with active gamers among under 24s

As we have seen with surveys of other global racing series there is an increasing crossover between motorsport fans and gamers, particularly among the younger generation. No fewer than 79% of MotoGP™ fans aged 16-24 actively participate in eSports (competitive gaming) at least once a month and 66% are gaming every week.

The data shows 41% all respondents are playing motorsport themed games each week. The figures for weekly gaming among males are significantly higher than female fans (42% versus 31%).

Analysis of older age groups highlights that 53% of 25-34 year olds are gaming at least once per week; regular weekly gaming declines with age, tapering

off to 42% among 35-44 year olds, 30% in 45-54 year olds, 18% among 55-64s and finally dropping to 13% for over 65s.

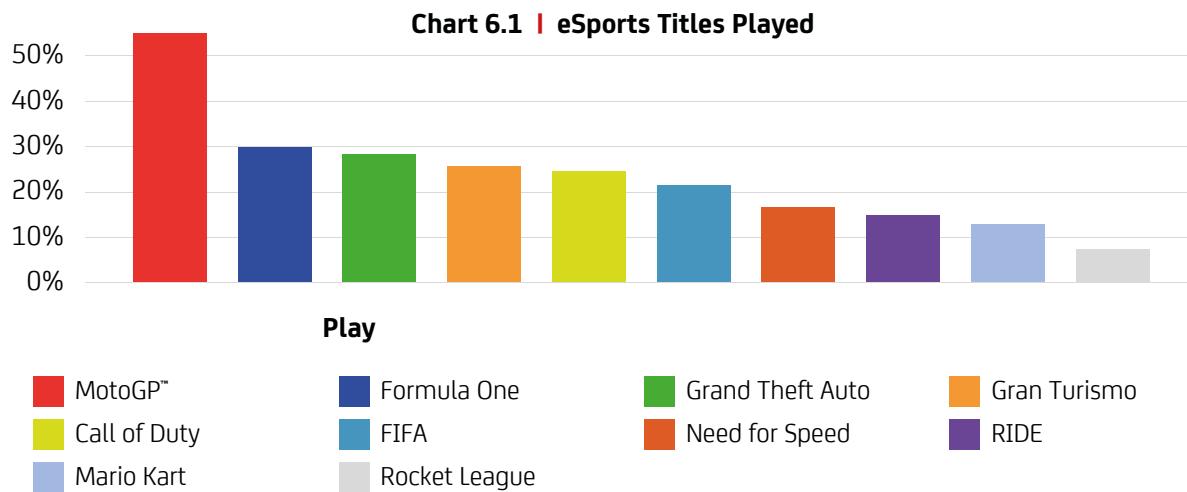
From a geographical perspective, weekly eSports participation was highest among fans in Europe & Asia-Pacific (42%).

The majority of fans (73%) engage with eSports through console-based gaming, with Sony PlayStation being the preferred choice for 44% of fans worldwide. PC based gaming (41%) and mobile gaming (40%) also enjoy significant usage.

Mobile gaming is notable among female fans (68%) and fans in Asia-Pacific (54%).



The top 3 most-played titles among MotoGP™ fans are the Official MotoGP™ game (53.2%) followed by the Official Formula One game (29.7%) and Grand Theft Auto (29.1%). As well as being the most played titles, these are also the most popular with fans, with MotoGP™ the #1 ranked title for 22.3% respondents, followed by Formula One at 8.8% and Gran Turismo at 8.5%.



## MotoGP™ Sponsorship

The survey looked at sponsorship and examined the extent to which MotoGP™ fans appreciate what sponsor brands bring to the sport and whether they actively seek out MotoGP™ sponsors products and services ahead of non-sponsoring brands.

- MotoGP™ fans have a strong belief that sponsorship enhances the sport (+73.8% net approval)
- MotoGP™ fans think more highly of companies & brands sponsoring the championship (+40.7% net agreement)
- MotoGP™ fans are more likely to consider products / services from companies sponsoring the championship. 49% of male fans are more likely to purchase products from a MotoGP™ sponsor
- Older (45+) male fans and fans in the Americas, Middle East and Africa show a higher recognition and preference to consider sponsors products and services
- All sponsorship platforms have a positive impact on consumer consideration – Team, Rider, Championship and Race
  - Visible sponsorship of MotoGP™ Team bikes
  - Sponsorship of MotoGP™ riders
  - Official MotoGP™ Championship Sponsors

- MotoGP™ riders endorsing a particular brand
- Track or race sponsorship
- Podium sponsorship

MotoGP™ fans show a clear understanding and appreciation of the positive benefits the sport derives from commercial sponsorships. Older, male fans in the Americas, Middle East and Africa display the highest support and consideration of sponsor products and services.

78% of all MotoGP™ fans believe that sponsorship contributes positively to the championship, this figure rises to over 80% among fans aged 45+.

Over half (51%) of fans consider sponsors' products and services more favourably while 49% of male fans actively consider sponsors' products above those of non-sponsoring brands, compared to 38% of female fans.

Support for sponsors and their brands is at its highest level among fans in the Americas with 64% more likely to purchase a product from a MotoGP™ sponsoring brand.

All MotoGP™ sponsorship platforms (Team, Rider, Championship, Race and Circuit) engage with fans in a positive way. Recognition of brands and the influence on consumer preference is high across all platforms.



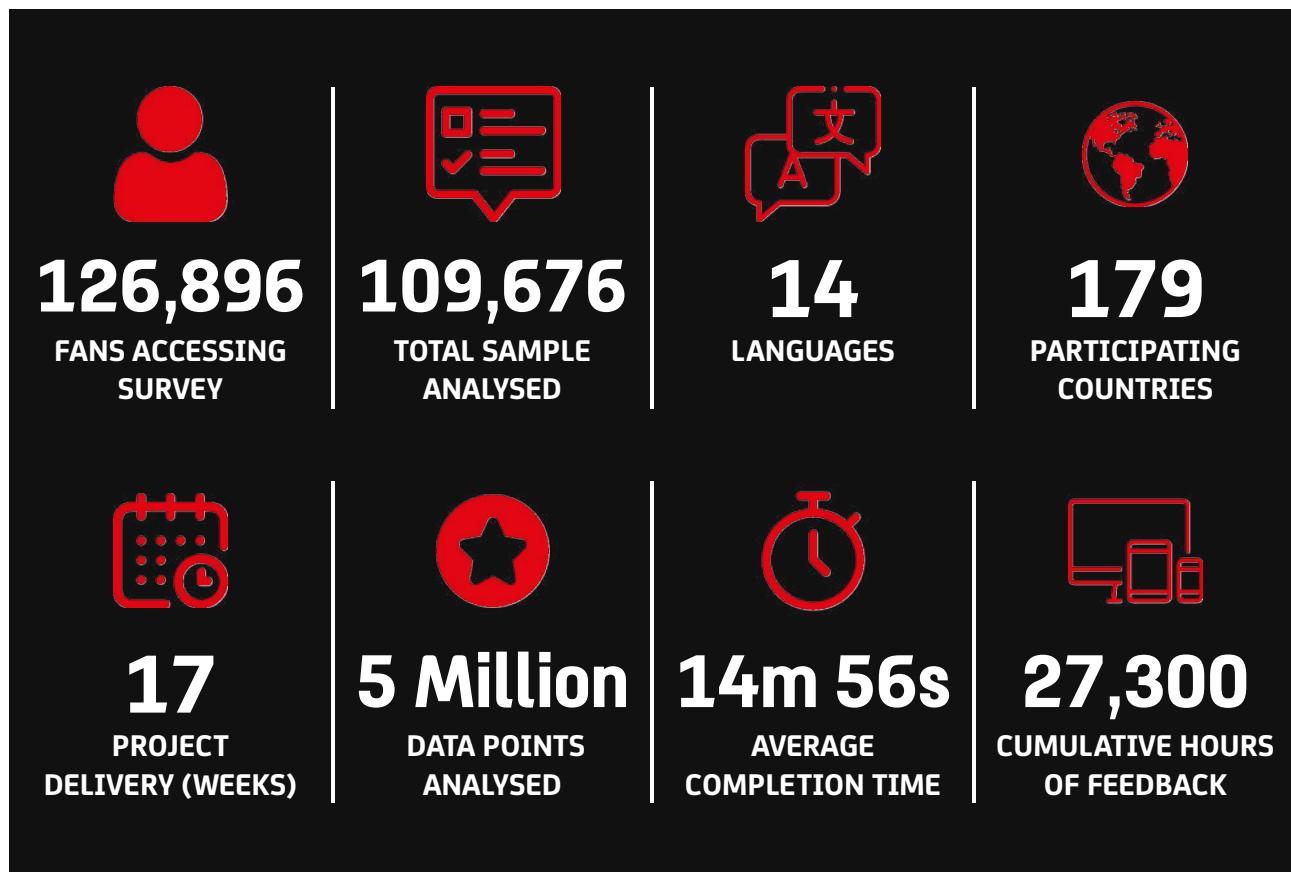
# Survey Key Statistics

The 2022 Global MotoGP™ Fan Survey was commissioned, created, governed and delivered by Motorsport Network between May and September 2022.

The study is the latest volume in a series of global fan insight programmes initiated in 2005.

The 2022 Survey was constructed, tested and translated into fourteen languages. It was hosted via a common, multi-lingual website at: [global-motogp-fan-survey-2022.motorsportnetwork.com](https://global-motogp-fan-survey-2022.motorsportnetwork.com)

A total of 109,676 completed responses were collected and submitted for analysis; making this, the largest single sports study analysed in MotoGP™. Survey questionnaire construction & testing, data analysis and results interpretation were conducted by industry experts, Nielsen Sports, with project planning, management, co-ordination and reporting provided by Ian Burrows of MPA Commercial. Thanks to more intuitive design, the average completion time was under 15 minutes. The survey process from initial concept to report delivery was completed by Motorsport Network and its expert partners in just 17 weeks.





# Index of Charts

---

| <b>Chart No.</b> | <b>Description</b>                                   | <b>Page</b> |
|------------------|--|-------------|
| 1.1              | Fan interest in MotoGP™ Championship                 | 11          |
| 1.2              | Length of Following MotoGP™ by Region                | 11          |
| 1.3              | Other Motorsport Series Followed by Region           | 12          |
| 2.1              | Key Features Driving Appeal for MotoGP™              | 16          |
| 3.1              | Team Ranking - Top 3 and Favourite                   | 18          |
| 3.2              | Top 3 Rider Ranking - Top 3 and Favourite            | 20          |
| 4.1              | Home Attendance Since 2016 by Region                 | 23          |
| 4.2              | Fan Ranking - Most Important Races (Top 10)          | 23          |
| 4.3              | Key Considerations for Race Attendance               | 24          |
| 4.4              | Preferred Race Day Ticket Pricing                    | 24          |
| 5.1              | Media Frequently Accessed During Race Weekend by Age | 29          |
| 5.2              | Devices Used for Accessing Content                   | 30          |
| 6.1              | eSports Titles Played                                | 34          |

# About Motorsport Network

**62 Million**

Unique users monthly

**17 Million**

Social media followers

**306 Million**

Page views monthly

**101 Million**

Sessions monthly

Motorsport Network is the leading independent media, interactive entertainment and e-commerce company focused on the Motorsport and Automotive industries and their fans. Every month, approximately 62 million dedicated users visit a Motorsport Network digital property, to buy, learn, be entertained, or simply to feed their passion for cars and racing.

## How Motorsport Network can help motorsport sponsors:

### Creating original content

- Developing branded content using a combination of our in-house experts
- To create both long and short form formats

### Sponsoring existing content

- Partner with our highly engaged editorial content and creative assets
- Align your brand with any race series, team or event via our distribution channels

### Advertising using your assets

- 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

### Brand activation beyond our media properties

- More than media, our range of assets can help wider business objectives
- Strategic opportunities for increased brand exposure
  - Sim racing eSports
  - Ticketing and experiential
  - Data and timing
  - Archive and live photography

## The Automotive and Motorsport ecosystem offers exceptional coverage and engagement;

### Automotive Publications

**motor1.com** **INSIDEEVs**

### Motorsport Publications

**motorsport.com** **motorsport.tv** **AUTOSPORT**

### Brands beyond editorial

**duPont  
REGISTRY**
**motorsport  
IMAGES**
**motorsport  
GAMES**
**motorsport  
TICKETS**
**AUTOSPORT  
INTERNATIONAL**
**motorsport  
JOBS**

A Buyer's Guide of Fine Automobiles is the premiere luxury marketplace with Exotic and Sports Cars for sale

The largest collection of images and videos across motorsport

Innovative provider of Games, eSports and Community services

The ultimate destination for event tickets, travel packages and experiences

Europe's largest motorsport show bringing together motorsport & automotive sectors under one roof

Recruitment platform for the motorsport industry

## Contact us

All things commercial:

✉ [commercial@motorsport.com](mailto:commercial@motorsport.com)

About Motorsport Network:

🌐 [motorsportnetwork.com/about-us](https://motorsportnetwork.com/about-us)

Advertise with the leading media house in automotive and motorsport:

🌐 [motorsportnetwork.com/advertise](https://motorsportnetwork.com/advertise)

# **motorsport**

NETWORK



MOTORSPORTNETWORK.COM