



INDYCAR in 2022

Global fan insight into North America's
premier open-wheel race series

Survey Report

February 2022

motorsport
NETWORK



With Thanks to:

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Contents

04	Welcome <i>Mark Miles</i>
06	Executive Summary <i>James Allen</i>
08	Methodology <i>Nigel Geach</i>
10	Audience
14	Brand Health
16	Media Landscape
20	Teams and Drivers
24	Race Experience
28	Sporting Spectacle
30	Esports
32	Partnerships
34	Survey Key Statistics
35	About Motorsport Network

Foreword

INDYCAR is growing – at a historic and rapid pace. Despite the impacts of a global pandemic, these last few years have been filled with milestones that resonate across the motorsports landscape and beyond.

Last season, our domestic broadcast partner recorded its largest audience ever for an NTT INDYCAR SERIES season while internationally we expanded access to our product across countries and continents. Our car count has risen to its highest level in more than a decade while we've added new races in major cities and world-class venues. As we prepare to kick off our season on the sunny streets of St. Petersburg, a sense of optimism permeates across our paddock.

But any picture of growth is incomplete without input from the key audience we're serving: our fans. That's why we were so pleased to engage with Motorsport Network on the largest survey of NTT INDYCAR SERIES fans ever conducted. The insights gathered from the Global INDYCAR Fan Survey have proved invaluable and will help us move forward with the confidence, clarity and vision that defines a world-class sports and entertainment organization.

The good news: our fans know we're growing too. They like and value our product, and in recent years their ranks are expanding. The NTT INDYCAR SERIES is seen as competitive and exciting, and just as we've attracted new and talented drivers to our field, we've also seen commendable success in attracting new devotees to our ranks. This includes a larger international audience, more millennial and Gen Z fans and more females.

The even better news if you're devoted to your product and want to see it succeed: there's more work to do. This survey provides terrific insight into the consumption habits of fans and the issues they prioritize. We know they like content across multiple platforms and want even more of it. Our challenge will increasingly be to meet content consumers where they are when they are in so many different places.

We also know that wider societal topics are on their mind, and they expect our sport to engage on important issues like sustainability and equality. We see these insights as opportunities to better serve our fans and react positively to their feedback. We applaud their passion and we're grateful for it.

As we embark upon a consequential and marquee year for INDYCAR, we're tremendously encouraged by the picture the Global INDYCAR Fan Survey provides. We're looking forward to a monumental year in 2022 and remain confident the future is bright for the NTT INDYCAR SERIES and its stars.

Sincerely,

Mark Miles



President & CEO,
Penske Entertainment Corp.



Executive Summary

It has been fascinating to work on this largest ever Global INDYCAR Fan survey and the inescapable conclusion is that fans believe that INDYCAR is a series on its way up.

The audience surveyed, totalling 53,579 fan responses from 147 countries, gives a global snapshot of fan opinions as the series enters the 2022 season, its third under the management of Penske Entertainment Corp.

INDYCAR is the pre-eminent single seater racing championship in North America, but it has long had a following in other continents due to prominent international drivers racing there. Today the international make-up of the grid is reflected in the findings of the survey, with a strong geographical spread outside of North America.

The series has its loyal followers in the older age groups, particularly in the United States, but INDYCAR will be studying closely the data on new, younger fans internationally. Thanks to the internet and social media giving easy access to rich content, anyone anywhere can become a fan today. And gaming and esports is clearly going to play a significant role in the future.

So what are the key callouts that I would direct your attention towards?

INDYCAR's core DNA is that it is highly competitive and an all round test of a drivers' skill - because it tests them on three different kinds of race circuits; ovals, road courses and street courses. Fans recognise this and value it highly.

Great attention should always be paid to the brand attributes fans use to describe the sport and 'competitive' tops the shortlist in this study, along with 'Exciting', 'Entertaining', 'Growing,' 'Dangerous' and 'Fun'.

The data shows that 48% of all respondents are playing motorsport themed games each week, while a staggering 85% of 16-24 year olds are gaming at least once per week

Fans want to watch races live on TV with over 95% of fans stating a preference for full race live coverage either via TV or via digital streaming.

There is strong demand for in person live race attendance. Over 80% of fans plan to attend a race in the future. That figure jumps to 89% among fans in North America. INDYCAR has in the past held races outside North America, but does not do so currently. Should they ever consider it, there appears to be demand with 77% of South and Central American respondents planning to attend, 57% of Europeans and 72% of fans in Asia-Pacific.

Over 70% of fans believe the sport needs to do more to attract and retain new fans - increasing diversity and addressing environmental issues are seen as the most important focus areas for INDYCAR.

A series that is growing, then and it will be fascinating to see how the trends develop in a couple of years from now.

Sincerely,

James Allen



Methodology

Nielsen Sports is delighted to have worked with Motorsport Network and INDYCAR in engaging with fans and providing a platform for them to make their views heard.

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 INDYCAR to engage the global fan base in the most comprehensive survey ever conducted among INDYCAR fans.

The 2022 Global INDYCAR Fan Survey is the first such endeavour by the sport and was created and translated into 11 languages and hosted via a common, multi-lingual website. Over a three-week period in January 2022, 53,579 fans across 147 countries shared their feedback on an array of topics.

The viewpoints provided and insights delivered from the fans help set a benchmark for INDYCAR. 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 INDYCAR 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 INDYCAR fans now and in the future can only serve to strengthen the sport moving forward in the coming years.

Sincerely,

Nigel Geach





Audience

INDYCAR audience growing internationally and among females

- Research Sample 53,579 fan responses analysed from 147 countries
 - Top 5 Markets by response were USA, France, UK, Japan and Canada
 - Average age 42 years 3 months; over 50% of fans in South and Central America and Europe are aged under 35 years
 - Female respondents represented 12.2% of the total sample, rising to 14.1% for North America; 16% have been following for less than one year
 - 80% of fans also follow F1, especially high (90%) in South and Central America and Europe 16%
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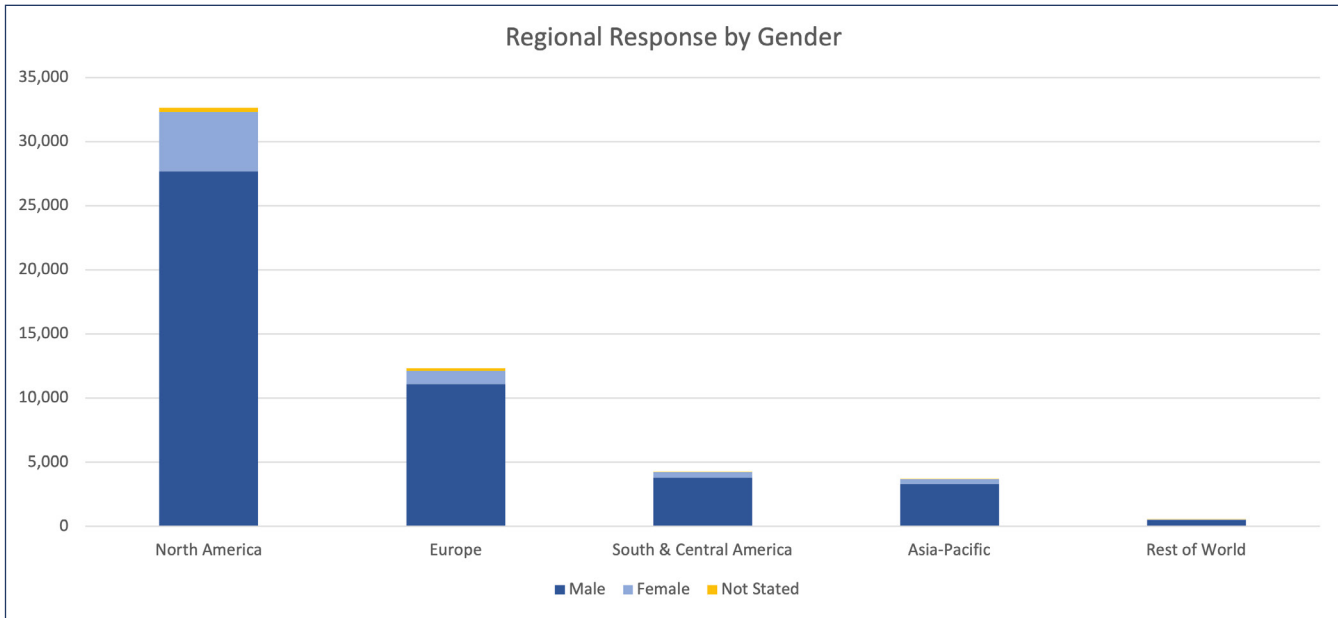
Research is only as credible as its sample and we are delighted to reveal that the findings of the 2022 Global INDYCAR Fan Survey are based on the largest, most balanced, global sample ever captured over 53,579 worldwide.

The survey was created and translated into 11 languages and hosted via a common, multi-lingual website. It was conducted over a 21 day fieldwork period from January 10 to January 31 2022. The total sample made available to Nielsen Sports, our expert research partners for analysis was 53,579.

Average completion time was 12 minutes, 12 seconds. Detailed demographic analysis of responses was conducted by age, gender and geographic region.

We are delighted to report a number of highlights from this first-ever global study:

1. Largest ever sample size, high engagement – while research samples in excess of 1,000 respondents are considered statistically robust; the overall sample of 53,579 exemplifies the desire and dedication of INDYCAR fans to commit significant time and effort to voice their opinion on the sport they love. Fans spent a cumulative total of 11,000 hours engaging with the survey.
2. Wide geographic spread – responses were received from fans in 147 countries worldwide and provide a truly global reach. Although we saw an obvious weighting towards INDYCAR's homeland of North America, the US and Canada audience made up 61% of the total response. European fans accounted for 23% of the sample, led by the UK and France, with fans in South and Central America and Asia-Pacific comprising 8% and 7% respectively.

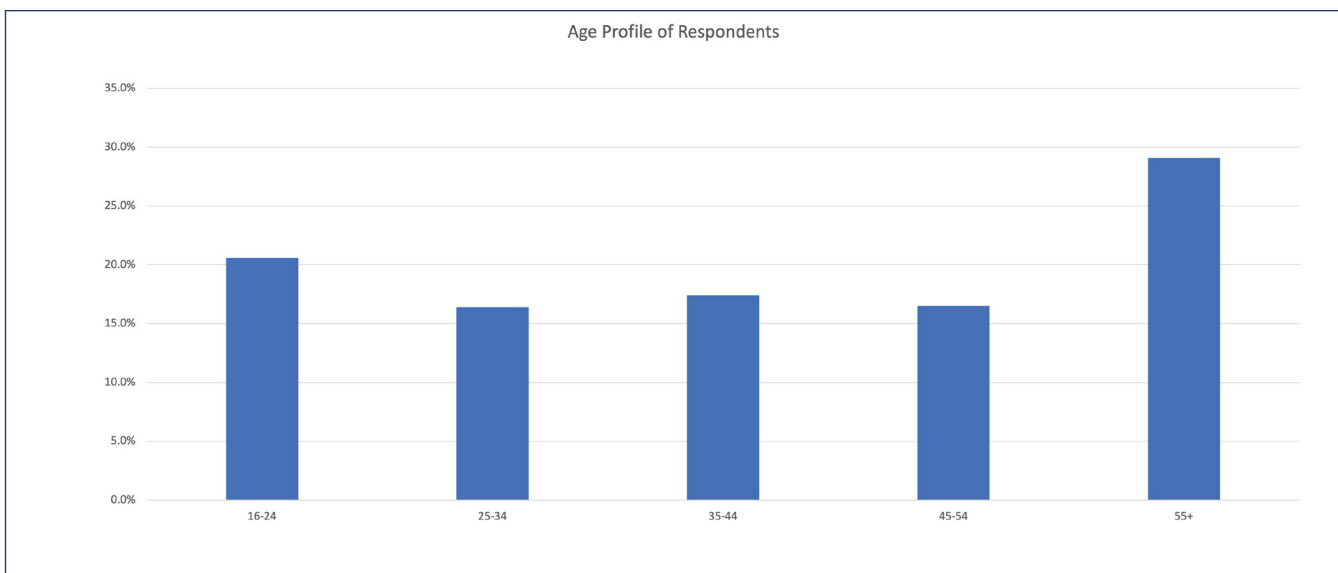


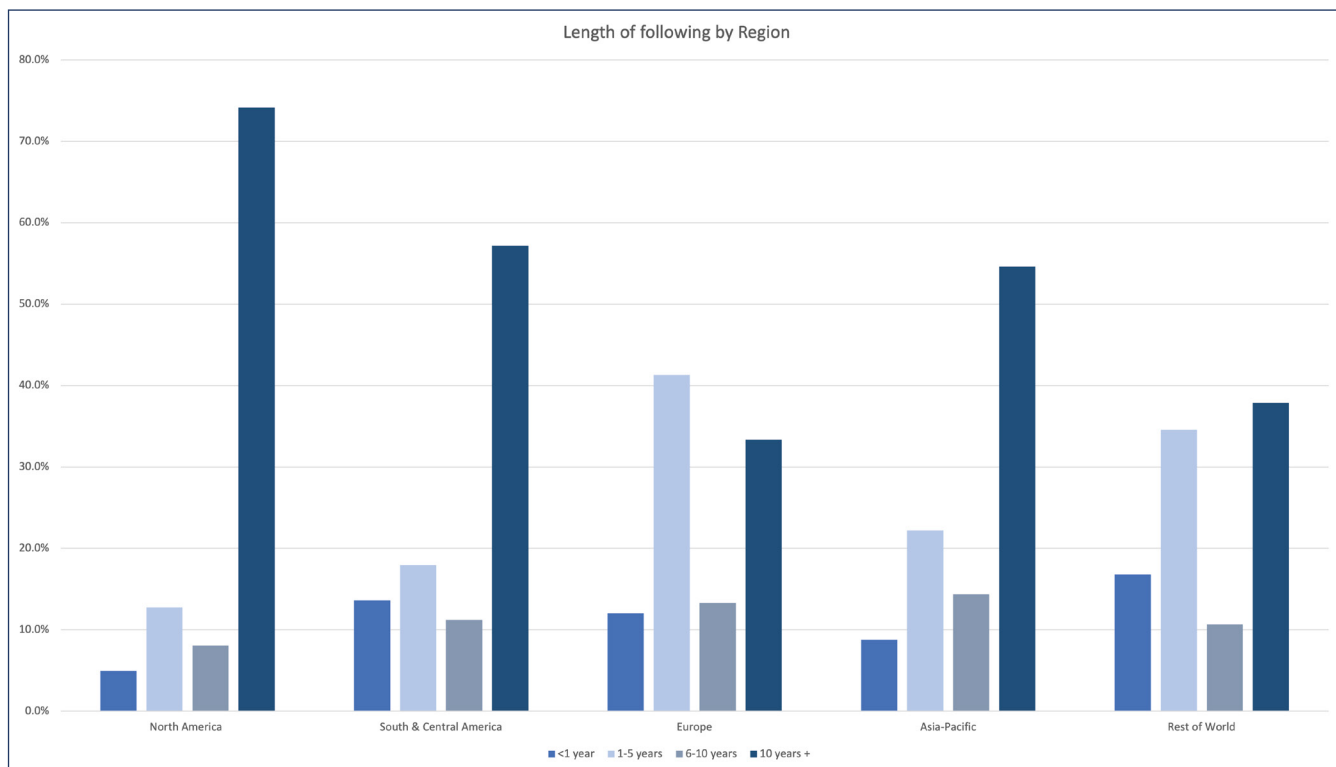
Fans in Africa and the Middle East accounted for <1% of the total sample. The international fan base is generally younger than North America, with more than half of international respondents coming from millennial and Gen Z age groups. This is a positive sign for INDYCAR's long term growth opportunities.

3. Female participation – More than 6,500 responses were recorded from females, accounting for over 12% the total sample. This is the second largest percentage from any survey of a global motorsports series conducted by Motorsports Network in last five years. Female participation was highest in North America, rising to 14% of that audience.

4. Age demographics – The Survey attracted an audience with an average age of 42 years, 3 months. This is largely driven by the more mature North American audience where 47% of respondents were aged 45+. Fans in South and Central America and Europe were significantly younger with 54% of respondents in both regions aged 35 or under.

5. A loyal and growing audience – INDYCAR enjoys a very loyal audience especially in North America, with 82% of fans following the sport for 6 years or more. However, the Series is attracting a new audience of fans particularly in Europe where 53% of fans have been following the Series for less than 5 years. Over 16% of female fans have been following the sport for less than 12 months.

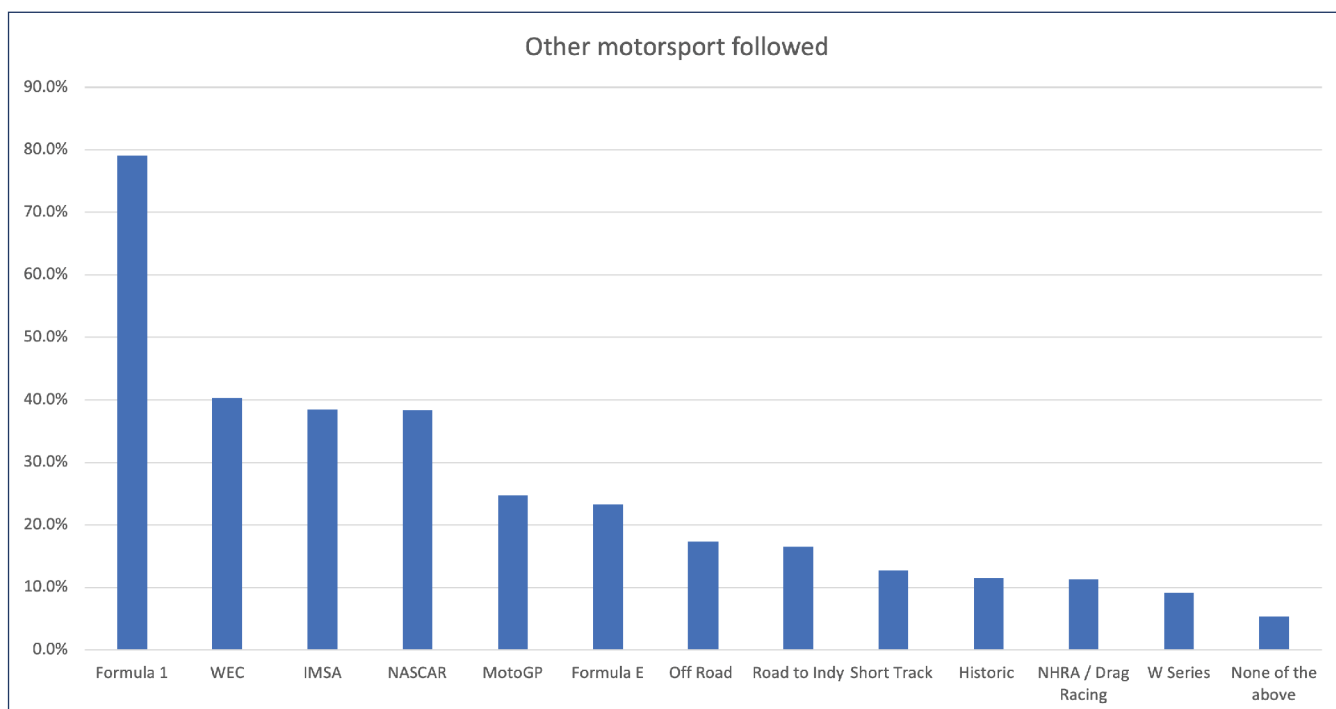




In common with all previous motorsport studies conducted by Motorsport Network and Nielsen Sport, the study attracted the greatest level of response from Avid fans (73%) – this is not unsurprising given that promotion was predominantly featured on motorsport – centric digital and social media platforms and with an average completion time in excess of 12 minutes it required a significant time commitment on the part of respondents.

INDYCAR fans follow a mix of other motorsports, most prominent among these is Formula 1 which is actively followed by nearly 80% of all respondents. F1 following is particularly high (90%+) among younger, male fans aged 16-24 in Europe and South and Central America. The popularity of F1 among INDYCAR fans mirrors the growing appeal of INDYCAR among F1 fans recorded in the 2021 Global F1 Fan Study.

INDYCAR fans also follow World Endurance Championship, IMSA and NASCAR in significant numbers with WEC and MotoGP more popular in Europe and NASCAR and IMSA more popular across the Americas.





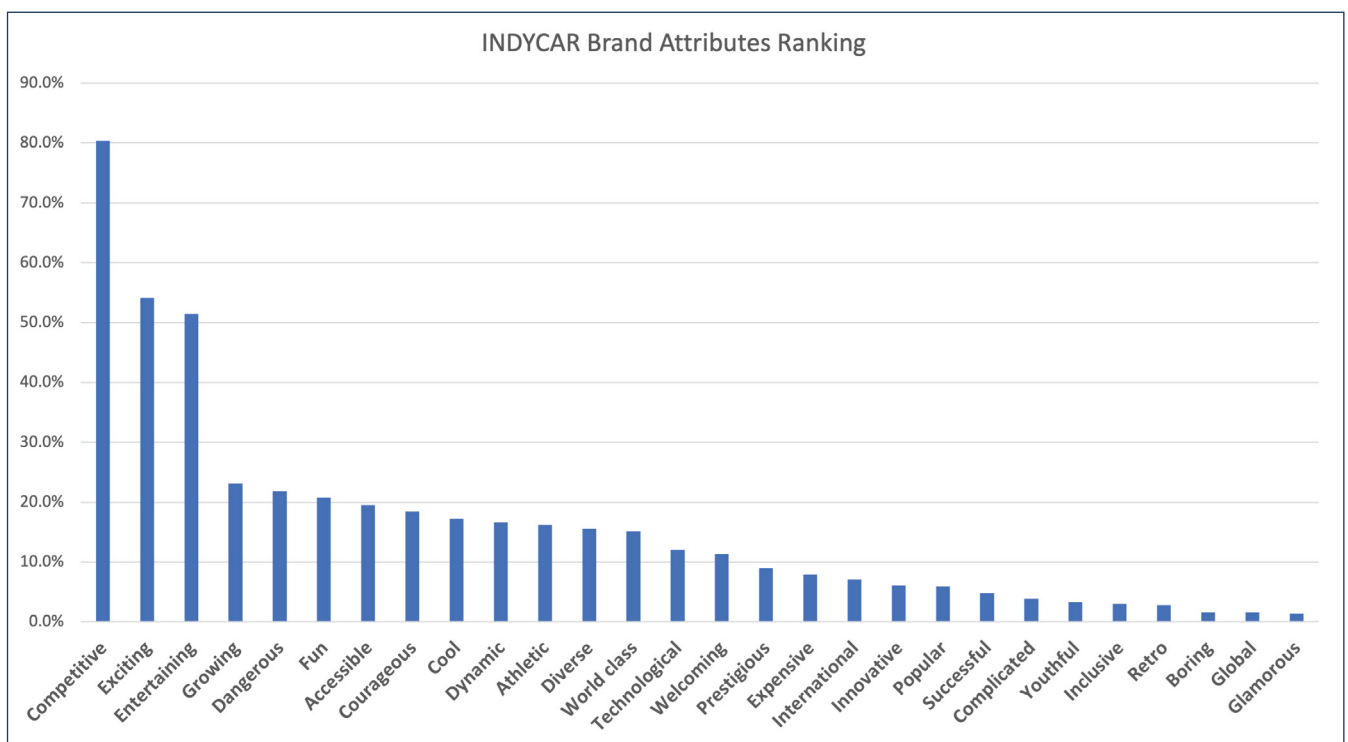
Brand Health

Majority of fans believe the sport is much healthier than 3 years ago

- Fans worldwide have an overall positive perception of the series
- Top attributes: Competitive, Exciting, Entertaining, Growing, Dangerous and Fun
- Over 80% of fans viewed the Series as competitive and believe it has the right balance of sport and entertainment
- Over 70% of fans believe the sport needs to do more to attract and retain new fans - increasing diversity and addressing environmental issues are seen as the most important focus areas for INDYCAR

One of the most significant data points we analyse in the Global INDYCAR Fan Survey is the response from audiences on how they feel about their sport. Is the series in better or worse health than three years ago? What adjectives would they use to describe the sport as it is today? And 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?

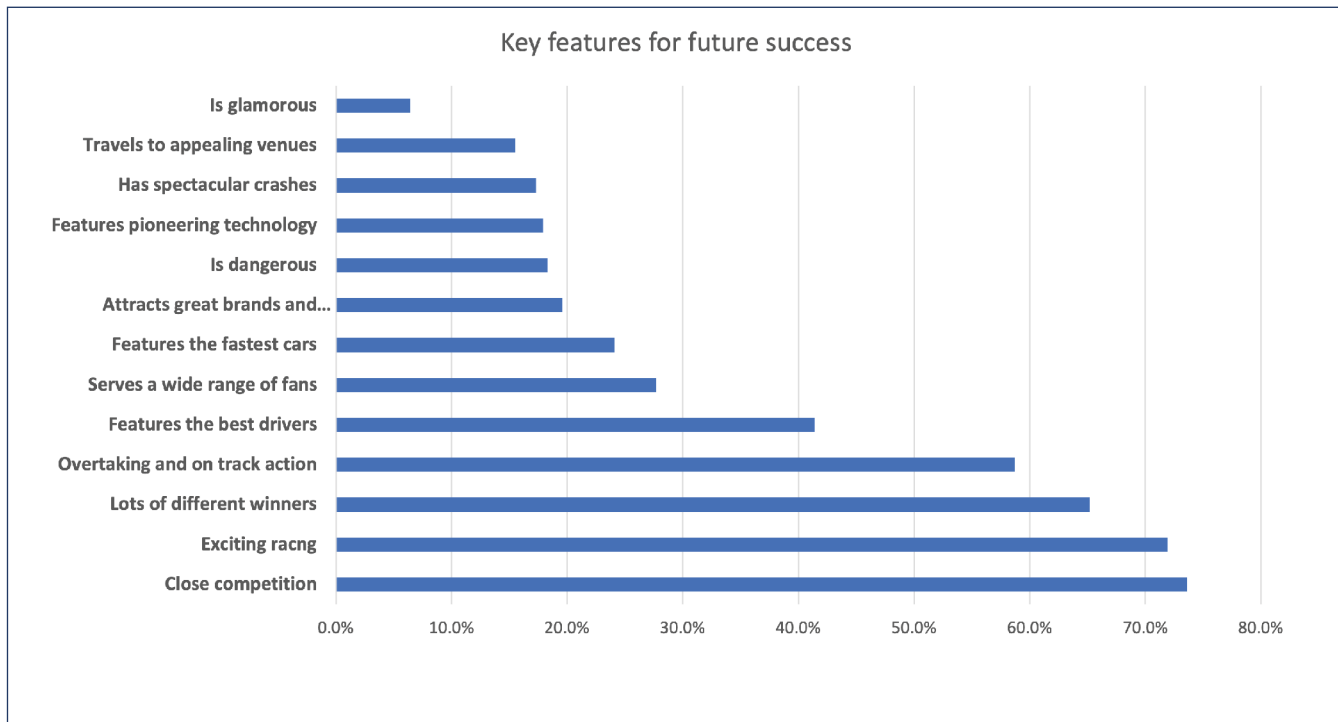
We are pleased to report that the brand health response in the first Global INDYCAR Fan survey response has been largely positive.



The top 10 INDYCAR brand descriptors are:

Competitive, Exciting, Entertaining, Growing, Dangerous, Fun, Accessible, Courageous, Dynamic, Athletic.

In addition, there is strong agreement that INDYCAR is exceeding fan expectation against a number of their most important measures. We tested INDYCAR delivery by weighing fan reaction for and against multiple factors and offsetting the positive and negative responses. The results showed that fans agreed INDYCAR was exceeding expectation against many key measures:



A particularly welcome finding was that 72.5% of all fans believe INDYCAR is in a healthier position than 3 years ago; this was felt particularly strongly by male fans in North America. In addition, there is a widespread agreement that INDYCAR strikes the right balance between sport and entertainment.

Overall fan opinion of INDYCAR is extremely positive. Yet, 70% of fans do highlight the need for the sport to continue to attract new fans, and this is especially important to fans in North America given the more mature audience. However, there is strong evidence to illustrate that the sport is successfully attracting new fans both within the female population and also internationally with over 50% of fans in Europe, Middle East and Africa having followed the sport for less than 5 years. The European INDYCAR audience is also significantly younger than its North American counterpart and weighted more heavily toward millennials and Gen Z.

While fan sentiment across a wide range of issues is generally positive, it should be noted that among the female fan base and those aged 16-24 there is a belief that INDYCAR could and should do more on a range of issues including environmental sustainability, diversity and gender equality.

Media Landscape

INDYCAR fans are avid content consumers across multiple platforms

- TV is the #1 most visited destination for INDYCAR race content
 - Cable TV is the #1 destination for viewership, with streaming overtaking Network / free-to-air TV
 - Over 90% of fans watch the full race live with 40% of those also watching qualifying regularly
 - Social media is the #1 most accessed content platform for fans aged 16-24
 - Live streaming of races has strong support among younger fans especially in Europe and Asia
-

The media landscape and consumer behavior continue to rapidly evolve, with these wider trends clearly reflected in the Global INDYCAR Fan Survey. The rise of digital and social media is highly apparent, as teams and drivers improve their competence in this area and their ability to engage fans. Meanwhile, streaming on direct to consumer platforms is shifting the way that sports fans want to consume their favorite sport.

For now, INDYCAR fans are still most likely to follow the sport through traditional TV platforms with 68% of fans watching 10 or more races live each season. This measurement rises to over 75% for fans in North America, two-thirds of whom watch more than 12 races each season.

As far as the actual content is concerned, INDYCAR fans are avid consumers of content with 90% of fans watching the entire race from green flag to checkered flag. Of this audience two-thirds (60% overall) watch the entire race plus pre-and post-race coverage.

INDYCAR fans are keen to increase their viewing with a high percentage of fans wanting to see official pre-season previews, along with in-season weekly video and digital content. 50% of fans in North America and 64% of fans in South and Central America want to see the race concluding podium celebration after each event.

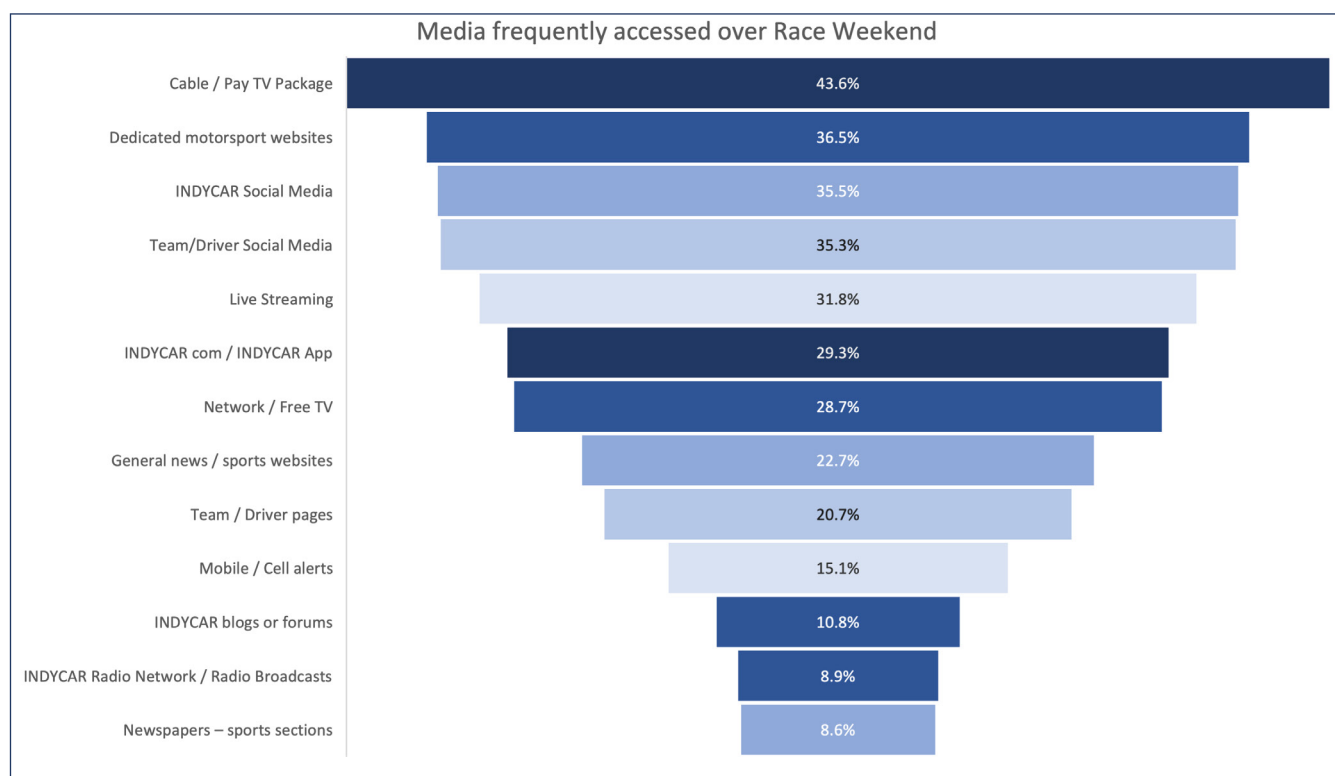
Media Consumption by Platform

Pay/Cable TV, specialist motorsport websites and social media are the leading platforms for fans to access INDYCAR news and information both during and outside of race weekends. The percentage of North American fans accessing INDYCAR races through a streaming service – which includes platforms HULU, SLING and YouTube TV - has now overtaken free-to-air (satellite) television viewing in North America and Europe with the number of fans regularly using free-to-air TV as a source of their INDYCAR content now under 30% globally.

In terms of variances, the study showed that older fans (45+) and those in the Americas were more likely to frequently access free-to-air TV for coverage. Conversely, younger fans (16-34) were significantly more likely to frequently access streaming platforms for racing coverage.

Regular fan usage of Team and Series social media is high, with over a third of fans regularly accessing these both during and outside of a race weekend. For fans in South and Central America social media is their #1 INDYCAR content destination.

While TV, digital and social media thrive, more traditional media platforms like radio and newspapers are increasingly peripheral.



Over the Race Weekend

TV leads the way with 70% of fans frequently accessing the races either via network/free-to-air or Pay TV/Cable for their INDYCAR content. Frequent usage increases to nearly 100% when we include use of streamed content; by way of contrast digital and social media are accessed frequently by 35% and 36% respectively of fans over a race weekend.

Frequent Pay TV usage over a race weekend is highest in North America and Europe at 35% and 36% respectively, while access in South and Central America is lower at 29%.

Network or free-to-air access sits at 34% in South and Central America, while European access is much lower at 12%.

Over 35% fans regularly access specialist motorsport websites and Team and Series social media during a race weekend with usage being highest in South and Central America.

Outside of Race Weekend

Unsurprisingly the usage of all media channels falls outside of race weekends; with specialist websites and social media platforms leading on race weekends.

Specialist motorsport websites enjoy high levels of fan usage with 33% of fans frequently accessing them for INDYCAR content; and while Team and Series social media access declines slightly from race weekend levels they are the second most frequently accessed media by 31% of fans outside of the race weekend.

Future Viewing Preferences

As well as understanding how fans view INDYCAR content today, we sought to understand better how fans wish to consume content in the future.

Reinforcing the findings from other recent motorsport surveys INDYCAR fans displayed a clear preference for viewing races live on TV; with over 95% of fans stating a preference for full race live coverage either via TV or via digital streaming.

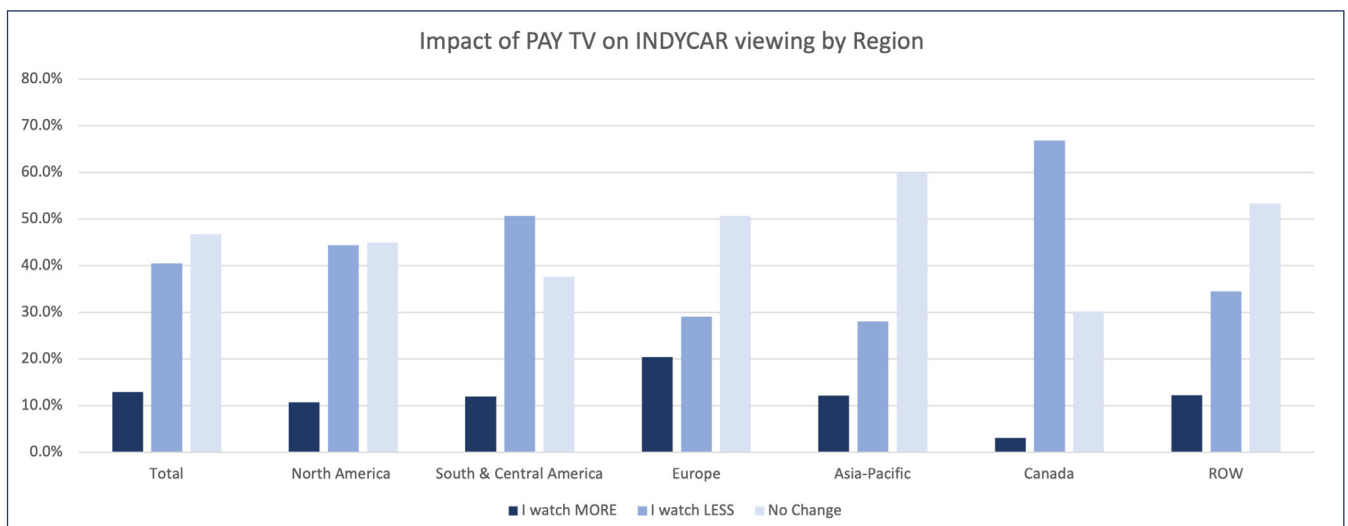
As the space continues to evolve, the survey suggests INDYCAR may need a flexible and diverse strategy ready to meet consumers across multiple technologies and platforms.

The Impact of Pay TV

44% of INDYCAR fans frequently access Pay/Cable TV over a race weekend and viewership is particularly high in North America. Of this audience, 24% frequently access Pay TV for INDYCAR content outside of a race weekend. Pay TV is now accessed more frequently by more fans than traditional Network / free to air coverage.

The move to Pay/Cable TV in some markets has impacted viewing habits. The negative impact of switching to broadcasts only available via Pay TV is most acutely experienced by older fans aged 55+. Of those whose viewing is impacted 70% will miss entire races and not watch highlights; 30% will watch the highlights only.

The experience of INDYCAR fans in Canada reflects that over two-thirds (68%) are now watching less coverage due to the current broadcasts offerings.





Teams and Drivers

INDYCAR fans are non-tribal with over 80% supporting a number of teams and drivers

- North American fans display strong support for both domestic and international drivers
 - Team Penske, Andretti Autosport and Arrow McLaren SP dominate the team rankings, with Penske voted #1 favorite team and Andretti and AMSP tied at #2 for fan favorite team
 - The top 10 driver rankings featured 7 different nationalities – a byproduct of INDYCAR's increasingly diverse field and growing international awareness
 - Romain Grosjean was INDYCAR's most popular driver in the Survey, closely followed by Pato O'Ward and Helio Castroneves
 - Rounding out the top driver results were Scott Dixon in fourth, Alexander Rossi in fifth, Josef Newgarden in sixth and Takuma Sato in seventh
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INDYCAR is non-Tribal

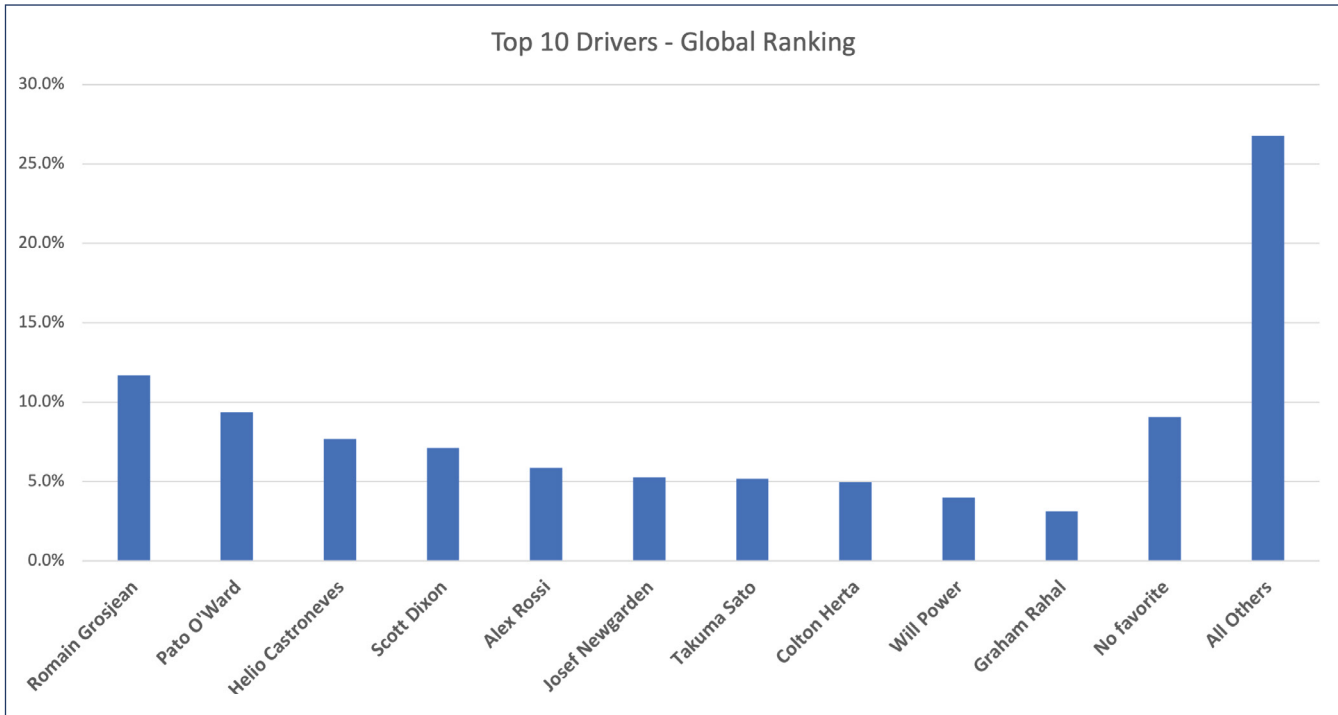
INDYCAR engages fans on a sport-first basis. In sharp contrast to most team-based sports, INDYCAR fans are not overtly tribal in their support.

Nearly 70% of fans follow a number of teams and drivers or are impartial to all. Only 13% of fans support one driver and just 8% of fans follow one team above all others.

Drivers

Within the Survey, we witnessed a very diverse spread of results and a high degree of local support for drivers – with the overall top 3 drivers each ranking #1 across different regions.

Unlike previous studies across other motorsport series, where a small number of competitors have dominated the rankings, support for drivers across INDYCAR is far more expansive. In the Global INDYCAR Fan Survey the top 5 drivers accounted for 42% of the total responses and the top 10 was just 62%. Nearly 10% of fans stated they had no favorite driver and almost a quarter (24%) voted for drivers outside the top 10.



Romain Grosjean emerged at the overall #1 driver in the final tally that was just as close and competitive as INDYCAR's on track action. His popularity was driven by strong support among younger fans (16-24) and those in Europe.

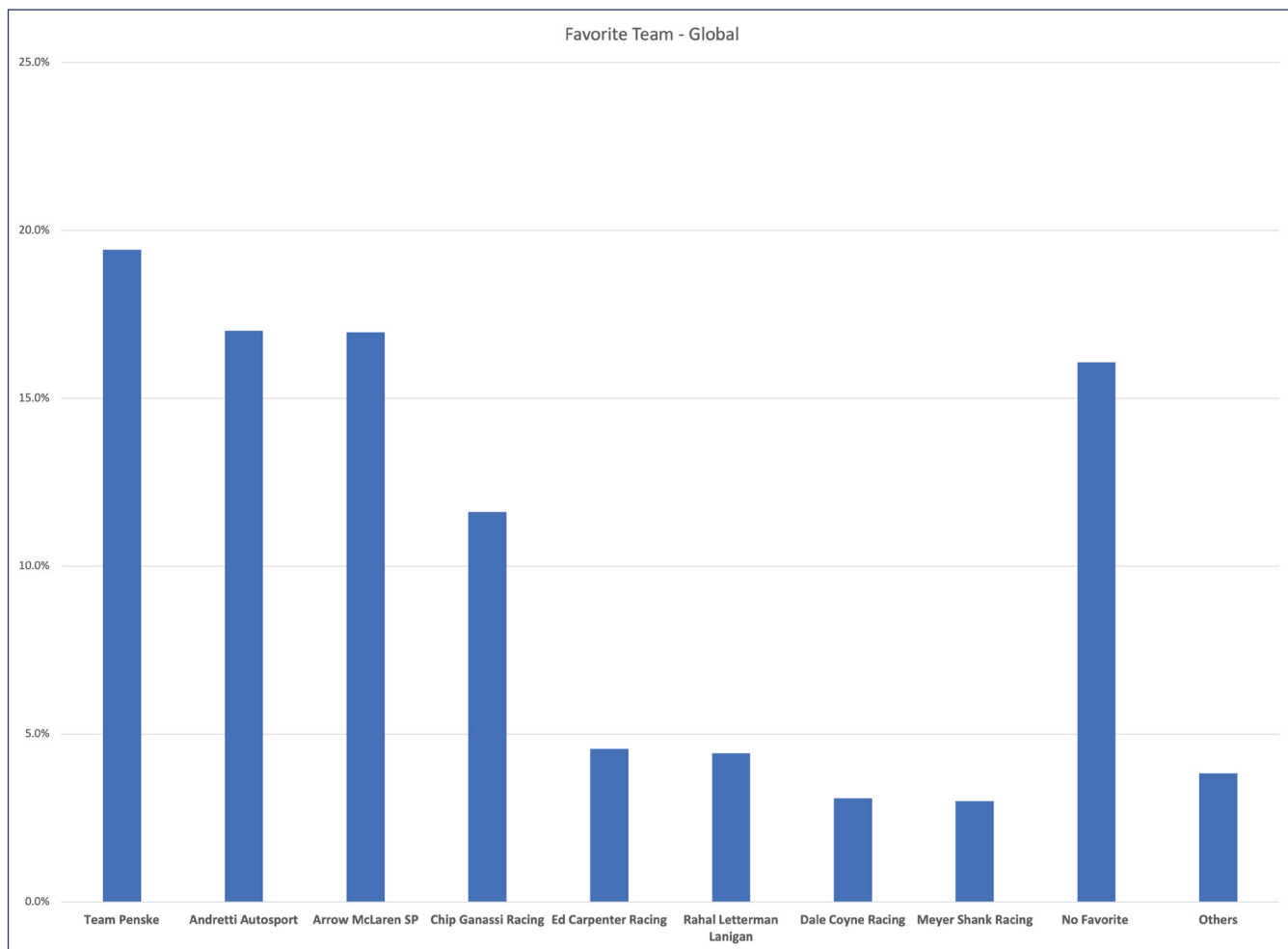
Pato O'Ward finished second in the Survey, with support again driven by younger fans where he and Romain voted #1 and #2, plus strong backing across South and Central America. Another key to his high standing was support among female fans, where he was the #1 voted driver.

Helio Castroneves was next at #3, as a result of strong support in North America, where he was the #1 voted driver. He also had a strong backing from older fans (55+).

Scott Dixon finished #4, with consistent support across all demographics, as did Alexander Rossi and Josef Newgarden, who finished #5 and #6 respectively. Takuma Sato was voted #7 favorite driver, in large part to his incredible support in Asia-Pacific where he was voted #1 driver by nearly 60% of the fans.

Overall, it seems clear that INDYCAR's global field has expanded growth opportunities and North American fans seems well-equipped to cheer for both domestic and international drivers.





Teams

The closely fought Team voting was headed by Team Penske, Andretti Autosport, Arrow McLaren SP and Chip Ganassi Racing, who between them accounted for 65% of all responses. However, the sport-first ethos of INDYCAR was seen again here, with over 16% of fans stating they had 'no favorite team', while the remaining fans split their favoritism across 11 different teams.

Team Penske finished #1 in fan support with 43.3% of fans placing them in their top 3 and 19.4% putting them at #1. Support was particularly strong among older fans (45+) across North, South and Central America.

Andretti Autosport enjoyed the broadest base of support and was listed in the top 3 favorite teams for nearly half of respondents (49.4%). 17% of fans ranked them as their #1 favorite team and support was strong across all ages, genders and geographies.

Tied #2 with Andretti Autosport is Arrow McLaren SP, who 17% of fans also selected as their favorite team. In addition, they were placed in the top 3 by 39% of respondents. However, the team enjoyed very high support among younger fans and those in South and Central America and Europe. Over 60% of fans aged between 16-34 put them in their top 3, with over 30% of the group placing them as #1.

Rounding out the top four is Chip Ganassi Racing who, like Andretti Autosport, appeal to a wide supporter base. 37% of fans placed them in their top 3 Teams, with 11.6% of respondents placing CGR as their favorite.



Race Experience

INDYCAR fans are avid race attendees with 80% planning to attend live races in the future

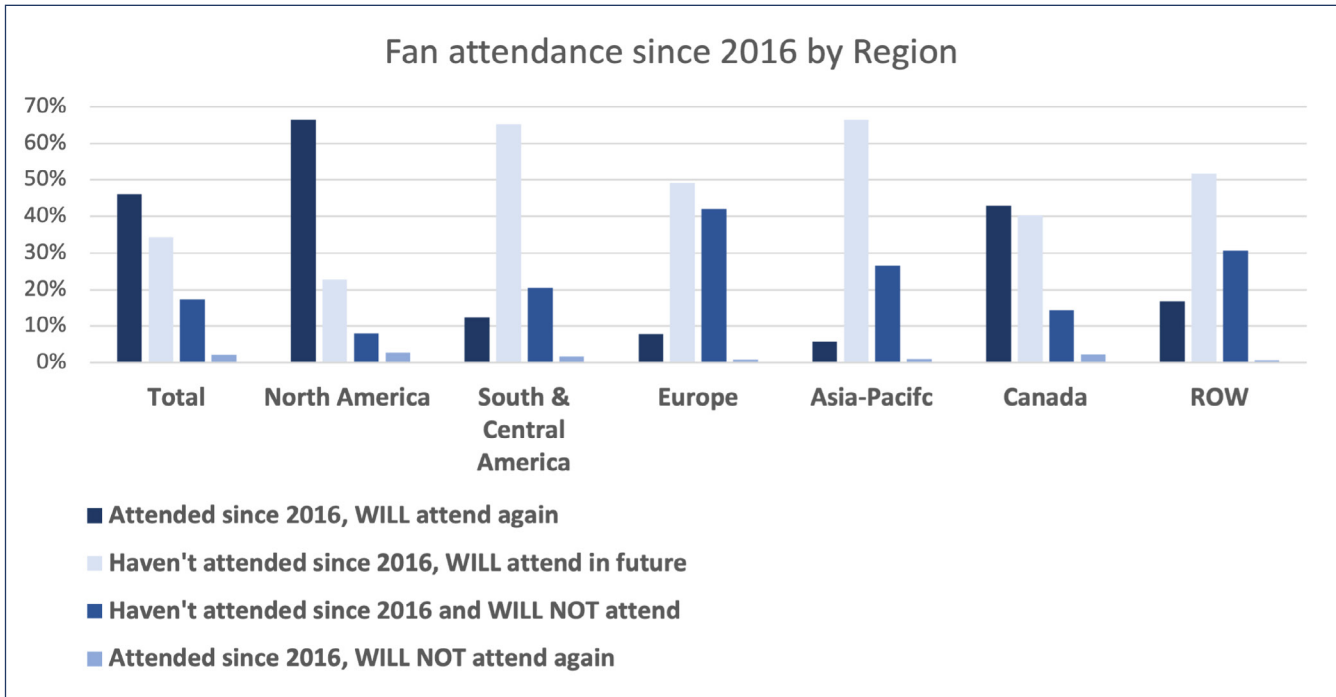
- Nearly 50% of fans have attended a race since 2016, 80% plan to attend a race in the future
 - Female fans are 10% more likely to attend a race
 - Geography is the single biggest obstacle to attending; 75% of non-attendees state lack of local race as the primary reason
 - The Indianapolis 500 is the single most-attended race, with nearly 30% of all respondents and 60% of race-going respondents attending the race in the past 5 years
 - Two-thirds of North American respondents have attended a race in past 5 years
-

INDYCAR fans are far more likely to attend a race than F1 fans, 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%.

The Indianapolis 500 is by far the most popular single event on the calendar. Among fans who have been to a race, nearly 60% have experienced the “Greatest Spectacle in Racing” first-hand.

Of those fans who have attended a race in the past 5 years, approximately two-thirds have attended in the last 12 months. This rises to 70% among 16-24 year olds indicating a very lively and engaged younger fan base.

Critically for INDYCAR, over 80% of fans plan to attend a race in the future and planned future attendance jumps to 89% among fans in North America. INDYCAR's growing audience of international fans also shows a high desire to attend a race in the future, with 77% of South and Central American respondents planning to attend, 57% of Europeans and 72% of fans in Asia-Pacific.



INDYCAR has established itself as a truly international series with a growing number of younger, international fans looking to experience the sport first-hand.

By far the biggest obstacle to fan attendance is geography: not living in the US, or close to a race venue, was cited by 75% of fans as the main reason for not attending a race in the past 5 years. Ticket cost was cited as a barrier to entry by 18% of fans, rising to 26% for fans in North America.

The Perfect Calendar

Based on fan appeal, the ideal INDYCAR track roster is as follows:

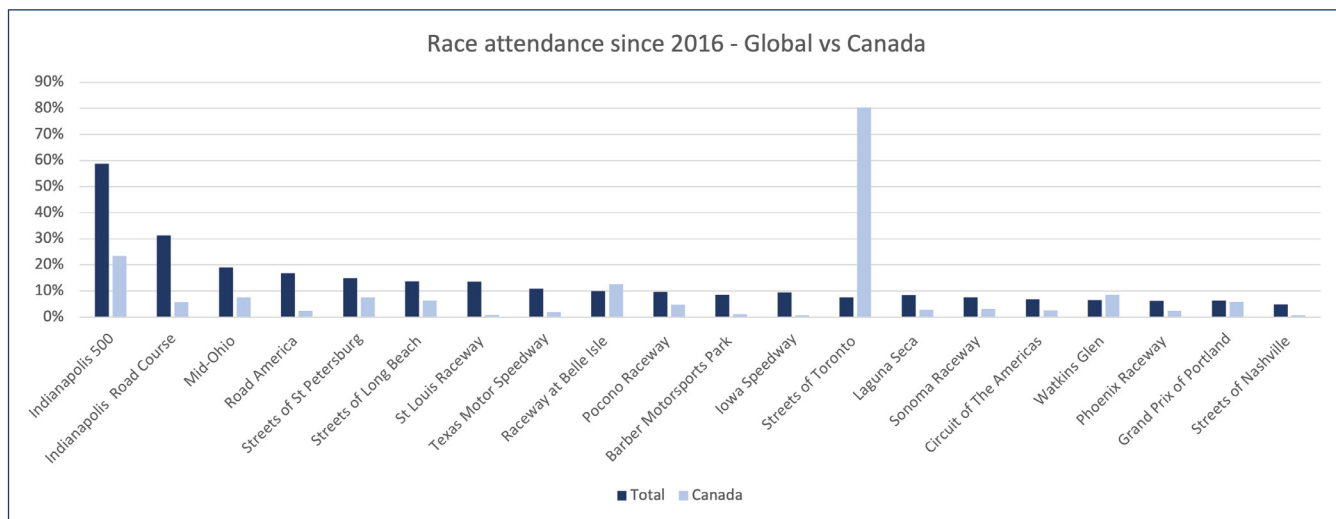
Indianapolis 500, Long Beach, Road America, Laguna Seca, St Petersburg, Texas, Circuit of The Americas (COTA), Indianapolis Road Course, Watkins Glen, Mid-Ohio, Pocono, Toronto, Phoenix, Detroit, St Louis and Barber (Alabama).

Of these, St Petersburg and Indianapolis Road Course scored significantly higher among female fans; with Laguna Seca and Road America scoring lower. Among younger fans (16-24) COTA, Indianapolis Road Course and Laguna Seca were noticeably more popular, with a corresponding fall in the popularity of Texas and Road America.

The response from fans in Canada is particularly noteworthy.

Canadian INDYCAR fans have shown the greatest likelihood to attend a live race; with over 80% of fans attending the Toronto event in the past 5 years and 83% planning to attend a race in the future. Canadian fans view Toronto as a key race, with over 60% of Canadian fans putting the race in the top 5 most important future venues, placing second behind the Indianapolis 500.

Recent Toronto event cancellations and travel restrictions due to COVID-19 have hit the Canadian fan base particularly hard with less than 10% attending a race in the past 12 months; significantly lower than fans from South and Central America, Europe and Asia-Pacific.

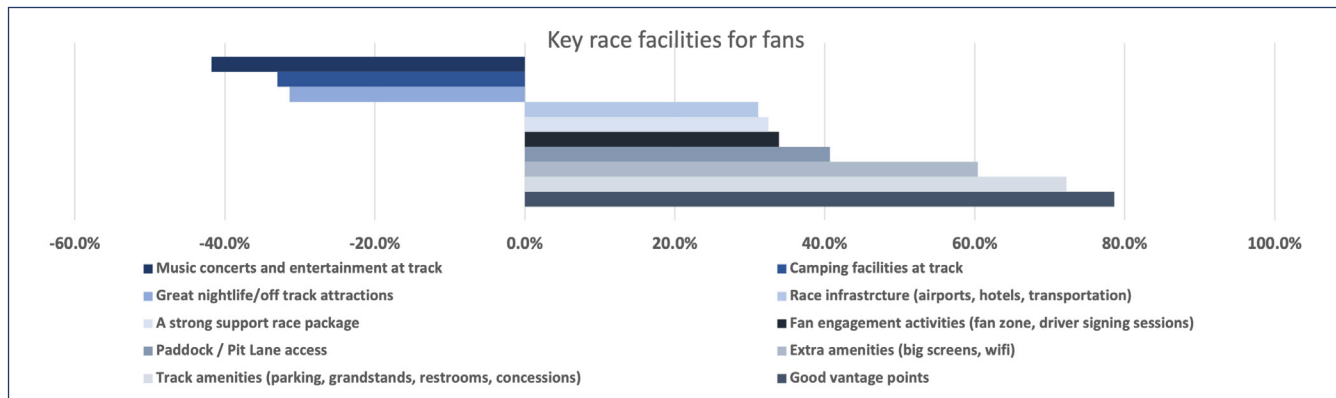


Race Promoters Guide

With such an active attending audience and the growing appeal to a traveling international audience INDYCAR is likely to attract significant event attendees.

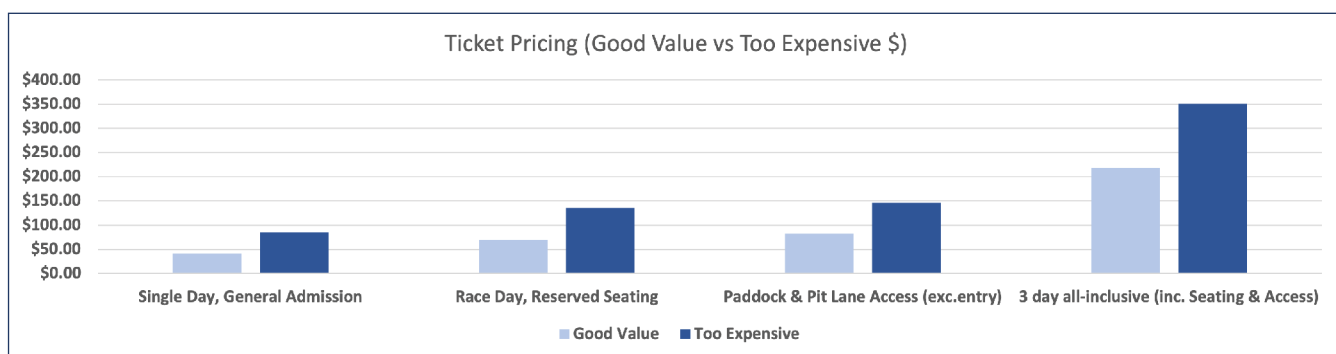
With over 25,000 respondents to the Survey having attended at least one race in the past 5 years, of whom 17,500 have attended in the past year; their feedback provides race promoters with an invaluable insight into key event features as well as pricing information to drive increased attendance for the future.

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



Next to geography and the lack of a local race, cost is the biggest obstacle to fan attendance. In the Global INDYCAR Fan Survey we explored fan attitudes towards ticket pricing. We asked fans to state the price point at which different ticket options were viewed as 'Good Value' and the price at which they became 'Too Expensive'.

This allows us to share a range of pricing from over 53,579 fans regarding ticket pricing as follows:





Sporting Spectacle

INDYCAR fans are very satisfied with the current sporting format

- Fans display very strong support for: multiple suppliers in key categories, double points for the Indy 500 and minimal steward interference
 - Fans indicate strong support for: cost containment for long-term health of the sport, prioritizing close racing over technical innovation, never finishing a race under yellow flag conditions and introduction of hybrid power
 - Fans don't support any modifications to current race format
-

INDYCAR fans were asked about a number of potential sporting changes to enhance the spectacle. The good news for INDYCAR is that fans recorded a very low demand for change.

Very Strong fan support [+40% net approval]

- Allowing multiple suppliers for key component areas including tires and chassis (+49.0%); this was particularly strong among older fans (45+) and those in North America
- Continuing to have the Indy 500 as a double points race (+47.2%); this had particularly strong support with younger fans (16-24) and fans in Asia-Pacific
- Minimizing stewards' interference and allowing drivers to race (+42.8%); this was most strongly supported among older fans (45+) and fans in Asia-Pacific, Europe and South and Central America

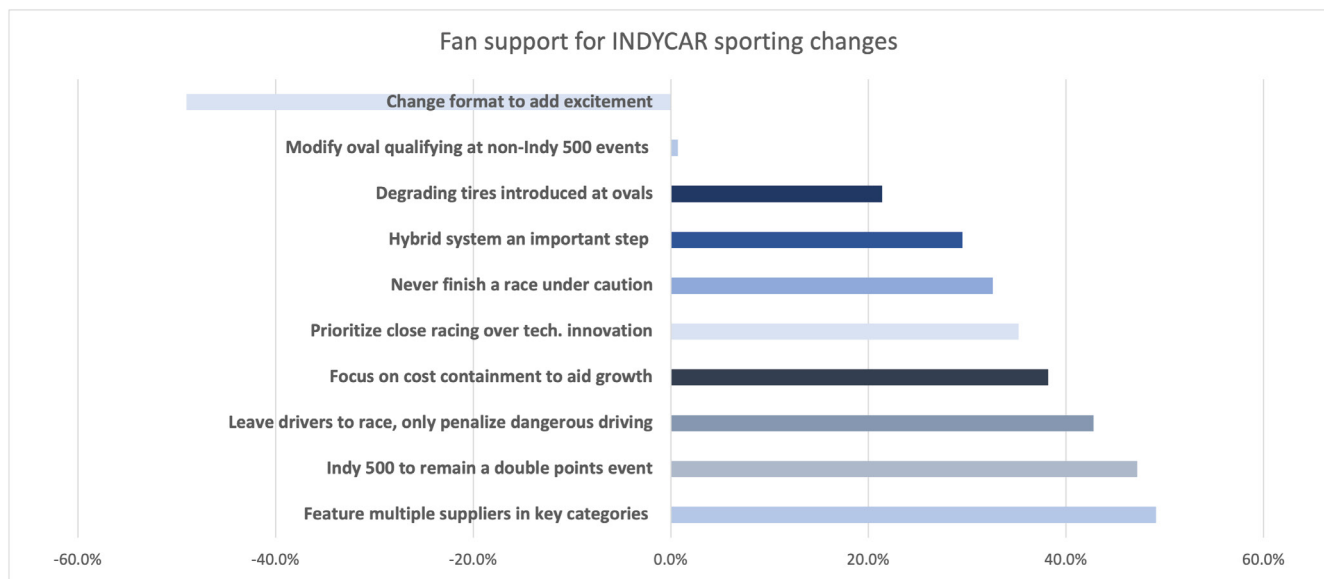
Strong fan support [+20.0% net approval]

- Maintaining a close control on costs to ensure the long-term health of the sport (+38.2% net approval); this was especially well supported in South and Central America
- Reflecting fans' views of INDYCAR as highly competitive; they expressed strong support to prioritize close racing over technical innovation (+35.2% net approval); this had particularly strong support in South, Central America and Europe
- Avoiding INDYCAR races finishing under caution / yellow flag (+32.6% net approval); support for this was particularly strong in South and Central America
- Alongside widespread awareness and acceptance of environmental issues; the introduction of hybrid engines is seen by most to be an important and constructive step (+29.5% net approval); this initiative had particularly strong support among younger fans aged 16-24 and fans in South and Central America

Very Strong Negative fan reaction [-40.0%]

- Fans are strongly opposed to changes to the current race format to “improve excitement” (-49.0% net disapproval); sentiment is particularly strong among younger fans (16-34) and those in North America
- Fans were uncommitted to any changes to oval race qualifying.

Overall, INDYCAR fans are protective of the current product and while they may cautiously embrace some changes, they view ensuring the continued competitive nature of the field as a key priority.



Esports

80% of fans aged 16-34 spending at least 90 minutes each week gaming

- Nearly half (48%) of all respondents are gaming at least once per week
 - Weekly gaming increases to 85% among 16-24 year olds and over 70% among 25-34 year olds
 - Weekly gaming is 25% higher in males than females (49% vs 38%); average game sessions are 1 hour 29 minutes
 - Over 63% of all fans in Europe and 60% fans in the South and Central America are gaming weekly, compared to 41% in North America
-

The Global INDYCAR Fan Survey demonstrates the increasing crossover between motorsport audiences and esports, with very high percentages of younger fans identifying as gamers. This bodes well for the sport, which recently announced a partnership with Motorsport Games to develop the first NTT INDYCAR SERIES video game in more than two decades.

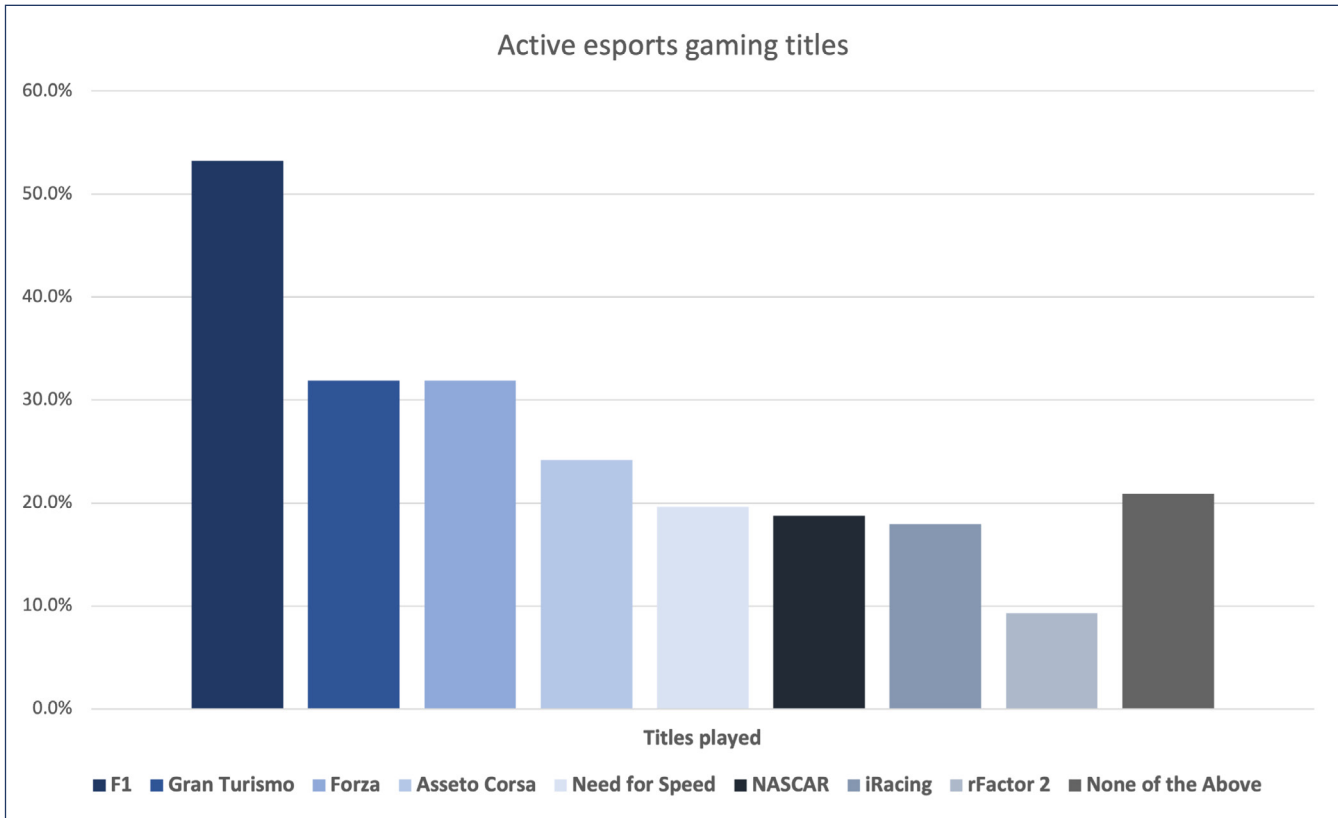
The data shows a remarkable 48% all respondents are playing motorsport themed games each week. The figures for weekly gaming among males are significantly higher than females (49% vs 38%).

Analysis by age highlights that 85% of 16-24 and 71% of 25-34 year olds are gaming at least once per week; regular weekly gaming declines with age, tapering off to 56% among 35-44 year olds, 39% in 45-54 year olds and finally dropping to 20% among fans aged 55+.

The average time spent per gaming session among INDYCAR fans is 1 hour and 29 minutes – this is higher among younger fans (1 hour 40 minutes), particularly those in Europe and South and Central America.

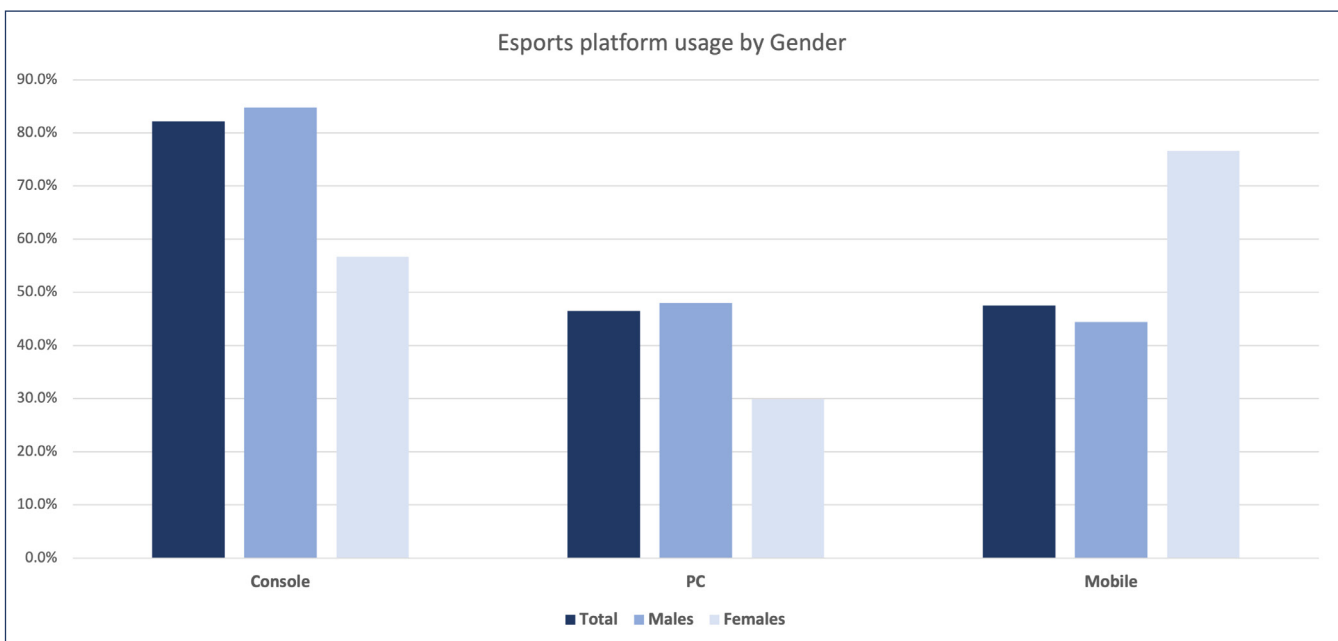
Weekly esports participation is highest among fans in Europe (63%) along with fans in Asia-Pacific (54%) and South and Central America (59%).

The top 3 most played motorsport titles among INDYCAR fans are the Official F1 Game (53.2%) with Gran Turismo and Forza tied on 31.9%.



In terms of non-motorsport titles the most popular and played titles among fans are Grand Theft Auto which is played by 34.2% of all fans and 48% aged 24 years old and under; Mario Kart which is played by 29% of all fans and 35% under 24 and Call of Duty which is played by 27% of all fans and 35% under 24.

We recorded broadly equal utilization of all three major gaming platform technologies. PC based gaming is frequently accessed by 47% of fans as is mobile gaming; console-based gaming is enjoyed by 83% of fans.



In terms of acquiring individual game titles; digital download is far more popular than physical purchase (69% v 39%); this holds true for all regions and age groups.

Partnerships

INDYCAR fans appreciate the positive benefit commercial sponsors bring to the sport

- INDYCAR fans have a strong understanding that sponsorship enhances the sport (+83.3% net approval)
 - INDYCAR fans think more highly of companies and brands sponsoring the Series (+60.4%)
 - INDYCAR fans are more likely to consider products / services from companies sponsoring the Series (+49.8%)
 - All sponsorship platforms have a positive impact on consumer consideration – Team, Driver, Series and Race
 - Brands in the top 5 for unprompted awareness globally are DHL, Firestone, Honda, NTT and Verizon
 - While top brands are recognizable across all demos, strength and order of awareness changes among regions and age groups
-

INDYCAR fans show a clear understanding and appreciation of the positive benefits the sport derives from commercial sponsorships. Older, male fans in North America display the highest support and consideration of sponsor products and services.

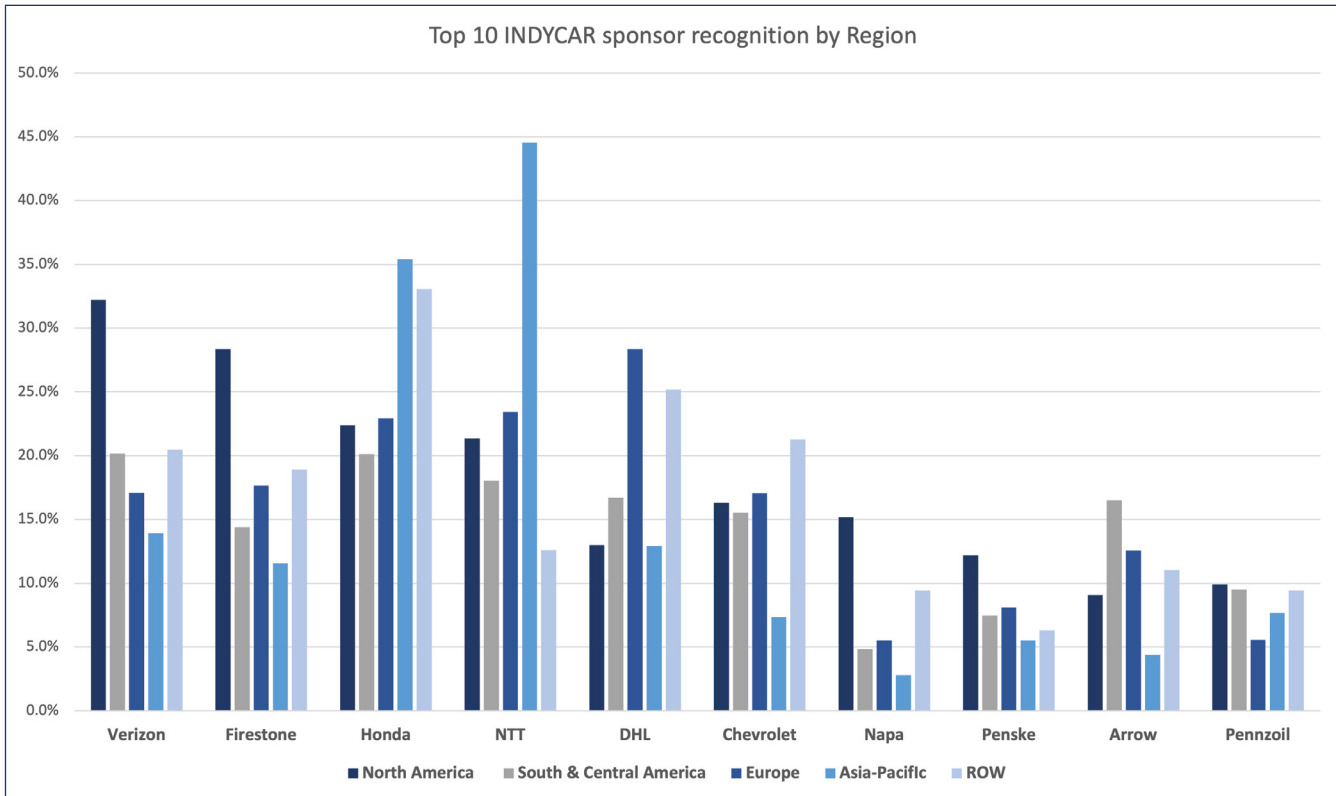
Over 80% of all INDYCAR fans believe that sponsorship contributes positively to the Series, this figure rises to nearly 90% among fans aged 45+.

60% of fans consider sponsors' products and services more favorably and half (49.8%) actively consider sponsors products above those of non-sponsoring brands.

Support for sponsors and their brands is at its highest among older (45+) male fans in North America. Female fans, while showing support for sponsoring companies, do so at a lower level.

All INDYCAR sponsorship platforms (Team, Driver, Series and Race) engage with fans in a positive way. Recognition of brands and the influence on consumer preference is high across all platforms. Typically, older fans (45+) in North, South and Central America are most likely to consider a sponsor's brand above a non-sponsor; European fans claim to be less influenced.

In terms of unprompted brand recall, we asked fans to state the first 5 brands or companies that came to mind when considering INDYCAR sponsorships, we witnessed an interesting spread of results across age ranges and regions.



Overall, the top 10 sponsor brands by spontaneous recall across the full survey sample were: Arrow, Chevrolet, DHL, Firestone, Honda, NAPA, NTT, Pennzoil, Penske, Verizon.

However, this ranking changed significantly by age range; among 16–24-year-olds the top 5 brands were NTT, Honda, DHL, Firestone and Verizon.

In Europe, the top 5 brands by spontaneous recall were DHL, NTT, Honda, Firestone, Verizon; while in Asia-Pacific the ranking was NTT, Honda, Verizon, DHL and Firestone.

With more than 30 brands recording over 1,000 mentions and fans stated inclination to consider sponsor brands above their competitors, it is clear that fans satisfaction of INDYCAR's on track success is being mirrored in the health of Series sponsorship across Teams, Drivers, Races and the Championship.



Survey Key Statistics

The 2022 Global INDYCAR Fan Survey was commissioned, created and delivered by Motorsport Network and INDYCAR between November 2021 and February 2022.

The survey was created and translated into 11 languages and hosted via a single multi-lingual website by motorsport.com. The Study fieldwork period spanned 22 days from Monday 10 January until Monday 31 January 2022.

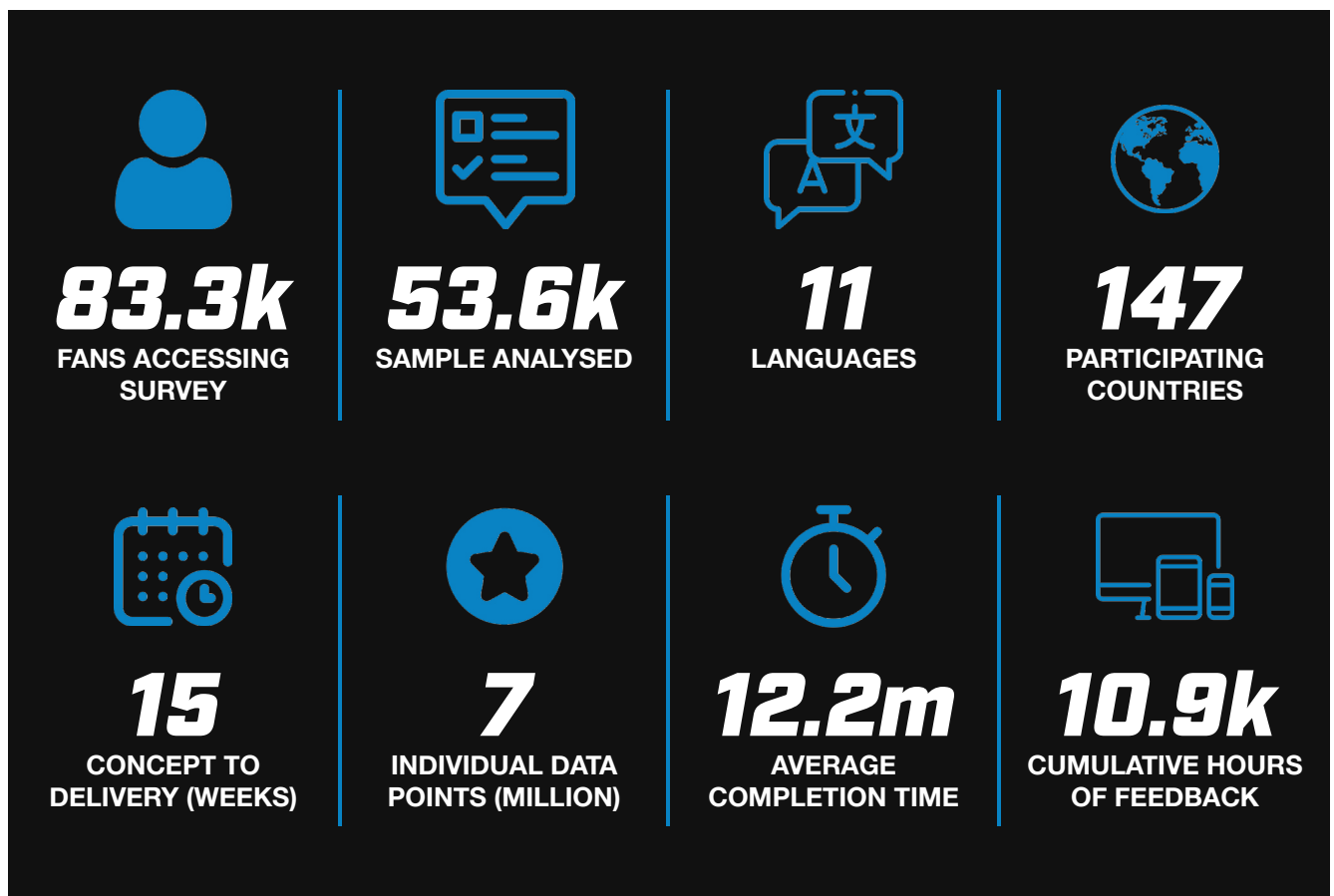
The total response sample submitted for analysis was 53,579; making this study the largest ever conducted in INDYCAR.

Survey questionnaire construction and testing, data analysis and results interpretation were conducted by industry experts, Nielsen Sports, with project management, co-ordination and reporting provided by MPA Commercial.

In addition to be the largest sample ever analysed; the 2022 study is the most diverse ever undertaken.

Thanks to intuitive design the average completion time for each respondent averaged 12 minutes and 12 seconds; culminating in a total investment by fans of an astonishing 10,900 hours of cumulative feedback.

The survey process from initial concept to report delivery was completed by Motorsport Network, INDYCAR and Nielsen Sports in just 15 weeks.



About INDYCAR

INDYCAR is the Indianapolis-based governing body for North America's premier open-wheel auto racing series, the NTT INDYCAR SERIES, and its developmental series, Indy Lights Presented by Cooper Tires. The NTT INDYCAR SERIES features an international field of the world's most versatile drivers – including reigning series champion Alex Palou, six-time series champion Scott Dixon, two-time series champion Josef Newgarden and four-time and defending Indianapolis 500 winner Helio Castroneves - who compete on superspeedways, short ovals, street circuits and permanent road courses. The 2022 season consists of 17 races in the United States and Canada and is highlighted by the historic Indianapolis 500 presented by Gainbridge. The NTT INDYCAR SERIES, Indy Lights, the Indianapolis Motor Speedway and IMS Productions are owned by Penske Corporation, a global transportation, automotive and motorsports leader. For more information on INDYCAR and the NTT INDYCAR SERIES, please visit www.indycar.com. For more information on Indy Lights, please visit www.indylights.com.

About Nielsen

Nielsen Holdings plc (NYSE: NLSN) is a leading global data and analytics company that provides a holistic and objective understanding of the media industry. With offerings spanning audience measurement, audience outcomes and content, Nielsen offers its clients and partners simple solutions to complex questions and optimizes the value of their investments and growth strategies. It is the only company that can offer de-duplicated cross-media audience measurement. Audience is Everything™ to Nielsen and its clients, and Nielsen is committed to ensuring that every voice counts. An S&P 500 company, Nielsen offers measurement and analytics service in nearly 60 countries. Learn more at www.nielsen.com or www.nielsen.com/investors and connect with us on Twitter, LinkedIn, Facebook and Instagram.

About Motorsport Network

62 Million	17 Million	306 Million	101 Million
Unique users monthly	Social media followers	Page views monthly	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.

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