

# 2017 WEC GLOBAL FAN SURVEY

## MEDIA REPORT



BAHRAIN

17th November 2017



FIA WORLD ENDURANCE  
CHAMPIONSHIP  
A PARTNERSHIP



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### Official Partners



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## 2017 WEC GLOBAL FAN SURVEY

# FOREWORD

Gérard Neveu  
CEO, FIA World Endurance Championship

Dear Friends

Endurance racing goes back to the very roots of motorsport, and indeed almost to the beginning of the automobile industry, and we knew that its fans were some of the most passionate and loyal within the sport.

What we didn't know, until we carried out this survey - the largest on endurance racing among motorsport fans with more than 54,000 responses - was exactly what they thought of the FIA World Endurance Championship, the product of a successful partnership between the FIA and the ACO.

It was extremely gratifying, therefore, to get such a positive response to our WEC Global Fan Survey and we want to say a sincere thank you to everyone who participated and who shared with us their passion and commitment to our sport.

It is the fans who inspire us to continue evolving and developing the WEC, and who support the different motor manufacturers and privateer teams, our competitors, in their participation at our events around the world. Endurance racing fans are some of the most knowledgeable in motorsport, as revealed in the survey you now have before you, and they display an interest and dedication to the WEC which should not be ignored.

From their deep desire to see continued close competition between world-class brands, high technology and innovation which can be transferred to the road cars of tomorrow, to the length of races and the famous sporting arenas in which they are held: our fans have spoken.

It was interesting to see a relatively young, digitally-engaged demographic and the fact that endurance racing continues to attract new fans via social media platforms is enormously encouraging. How we watch and engage with endurance races must inherently differ slightly to how we follow shorter, sprint races, and we now have solid data to help us formulate our plans for the future.

We believe we are now in a very positive position to meet the challenge of taking the WEC into the future. Thanks to the feedback from our fans, we will be able to build on the audiences at each round of the championship, grow our viewing figures which will in turn attract more competitors and commercial partners.

There is still much work to do and challenges to meet to satisfy our fans, but the opinions given by them in this survey will contribute greatly in helping us to improve and move forward our championship for the years to come.



## 2017 WEC GLOBAL FAN SURVEY

**EXECUTIVE SUMMARY**

In September 2017, WEC undertook a global fan insight programme in partnership with the world's largest motorsport media company, Motorsport Network.

Over a 25-day fieldwork period, fans from around the world were invited to submit their feedback on a broad range of issues relating to WEC; the survey represents the largest ever study on endurance racing conducted among motorsport fans and provides some clear indicators for future on and off track developments.

The results show that WEC has built an established global fanbase, which is being complemented by a growing audience of younger digitally engaged fans. With an average age of 38, WEC has a good balance of fans with 57% over 35 and 43% under. They are not active followers of other sports, but do follow motorsport, especially F1 closely. They are affluent, active event attendees with higher than average income and car ownership.

WEC fans are motorsport purists, the main focus of their interest is automotive technology and close, exciting, on-track action. Their view of WEC brand health is very positive with strong attributes and the right balance of sport and entertainment. However, they believe that WEC needs to continue to attract new fans and is not as healthy as it was 3 years ago.

The audience are avid fans with 95% viewing WEC as one of their preferred motorsports and crossover with Formula 1 is very high (88.7%). WEC fans are extremely information hungry and are using a broad range of media to consume content. The emergence of WEC's younger audience is driving social and digital media usage to levels not previously witnessed

in other studies. Specialist websites, not TV are fans #1 source for content and over 60% of fans are actively using official WEC social media platforms especially YouTube.

In the future, fans are increasingly looking to online streaming and on demand video to satisfy their viewing needs; among WEC's under 35 fanbase; this demand is now set to overtake traditional TV as the #1 viewing choice. The majority of fans (60%+) show a willingness to pay for additional content in the future.

Much of WEC's appeal stems from its diversity; fans are attracted to WEC for the range of categories, events, race durations and manufacturers; they state a clear preference for an 8-10 event season of races with varying durations (6H, 12H, 24H and 1000kms) including races at Le Mans, Fuji, Sebring, Silverstone and Spa.

WEC fans value to contribution made by sponsors and show a clear preference for considering sponsors products above others.

## 2017 WEC GLOBAL FAN SURVEY

## KEY SURVEY STATISTICS



**88.2k**

Total # of fans  
accessing survey



**54.5k**

Completed  
surveys



**37.2k**

Analysed  
responses



**179**

Participating  
countries



**10**

Languages



**25**

Days of  
fieldwork



**1.1m**

Individual survey  
page views



**6.8m**

Individual data  
points analysed



**10:17**

Average completion  
time (mins:secs)



**9,350**

Hours of fan  
feedback



**66.5%**

Response via mobile  
(57.5%) & tablet (9.0%)



**33.5%**

Response via  
desktop



**26.6%**

Responses via  
social media



**19.4%**

Total responses via  
Facebook

**motorsport**  
NETWORK

**46.1%**

Responses via  
Motorsport Network



**6.4%**

Responses via  
email marketing

## SECTION 1

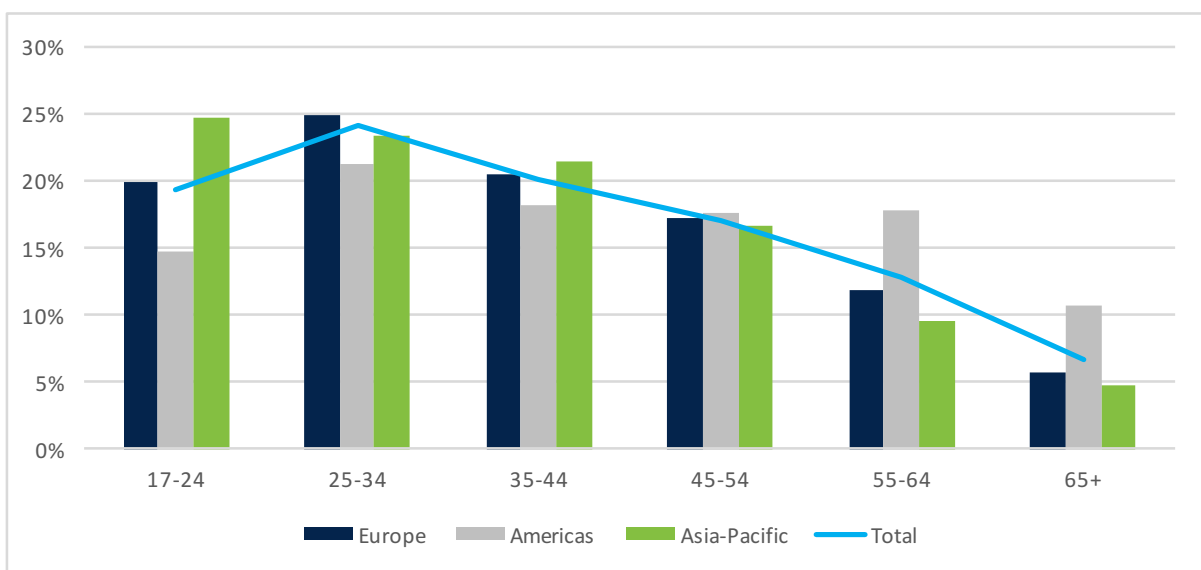
## THE AUDIENCE

## Headlines

- > The largest study ever conducted among sportscar fans
- > Over 54,500 fans took part, taking on average 10m 17s to complete the survey
- > WEC has a loyal, well-established base of fans complemented with an emerging, younger audience
- > WEC fans are motorsport purists who don't actively follow other sports in great numbers
- > WEC attracts an affluent, car-owning, professional audience with an average 1.95 cars per household

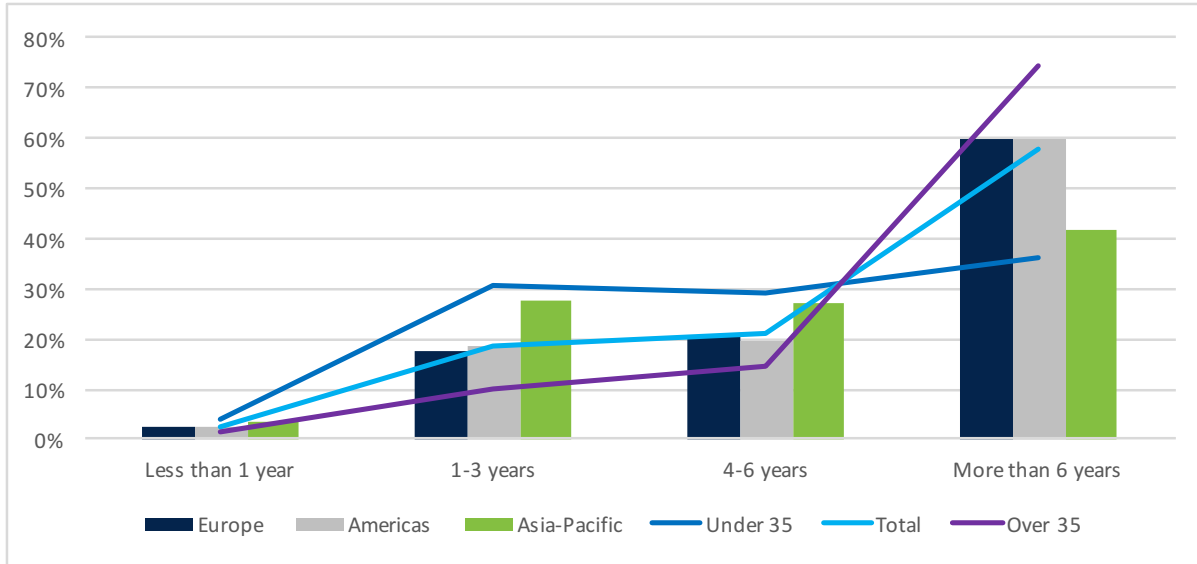
Response was received from fans in 179 countries worldwide (The United Nations officially recognises 203 countries worldwide). European responses accounted for 65% of the overall sample, with 20% from the Americas, 10% from Asia-Pacific and 5% from outside these regions. The age profile of WEC fans shows the broad appeal of the sport, with an average age of 38, there is a very balanced split between under 35 (43%) and over 35 (57%) age groups (Chart 1.1).

Chart 1.1 | Age profile of respondents



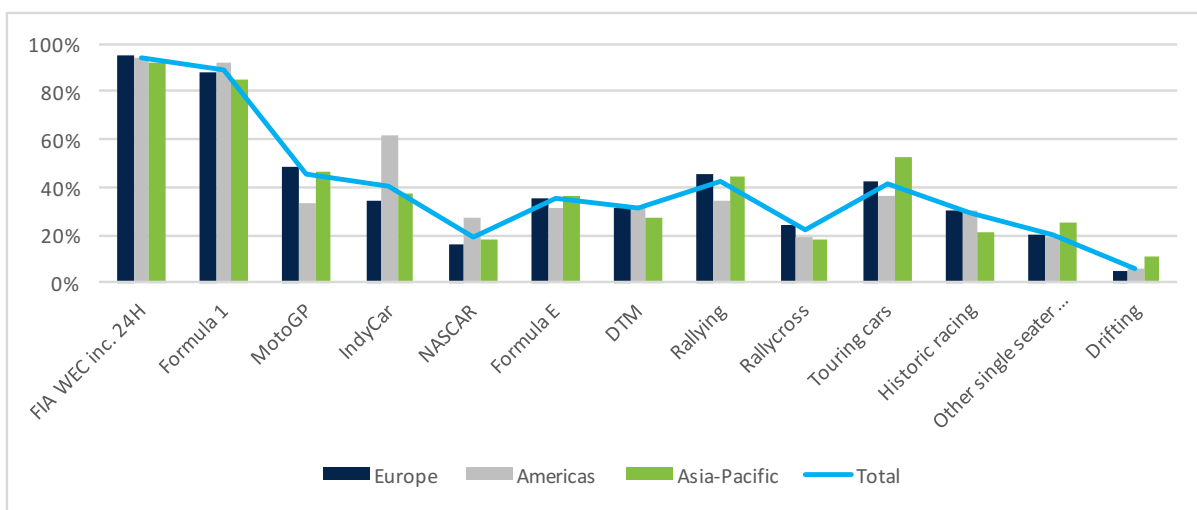
Nearly 80% of the audience have been following Endurance Racing for more than 4 years; however, evidence shows that WEC is appealing to a younger audience, with over 35% of under 35s following the sport for 3 years or less (Chart 1.2).

**Chart 1.2 | Length of following WEC (2017)**



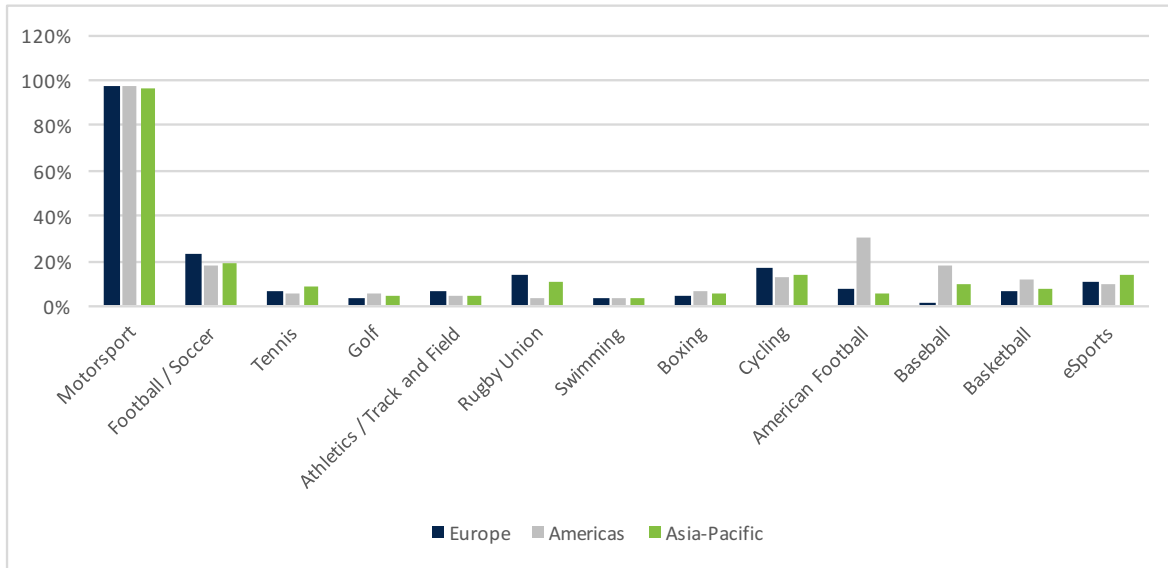
WEC fans are big followers of F1, 87.7% of WEC fans actively follow F1. This mirrors the appeal of WEC among F1 fans, reported in Motorsport Network’s April 2017 F1 Global Fan Survey. Interest in other motorsport series falls dramatically; except in the US where Indycar is well supported (62.0%) (Chart 1.3).

**Chart 1.3 | Motorsport series followed by WEC fans**



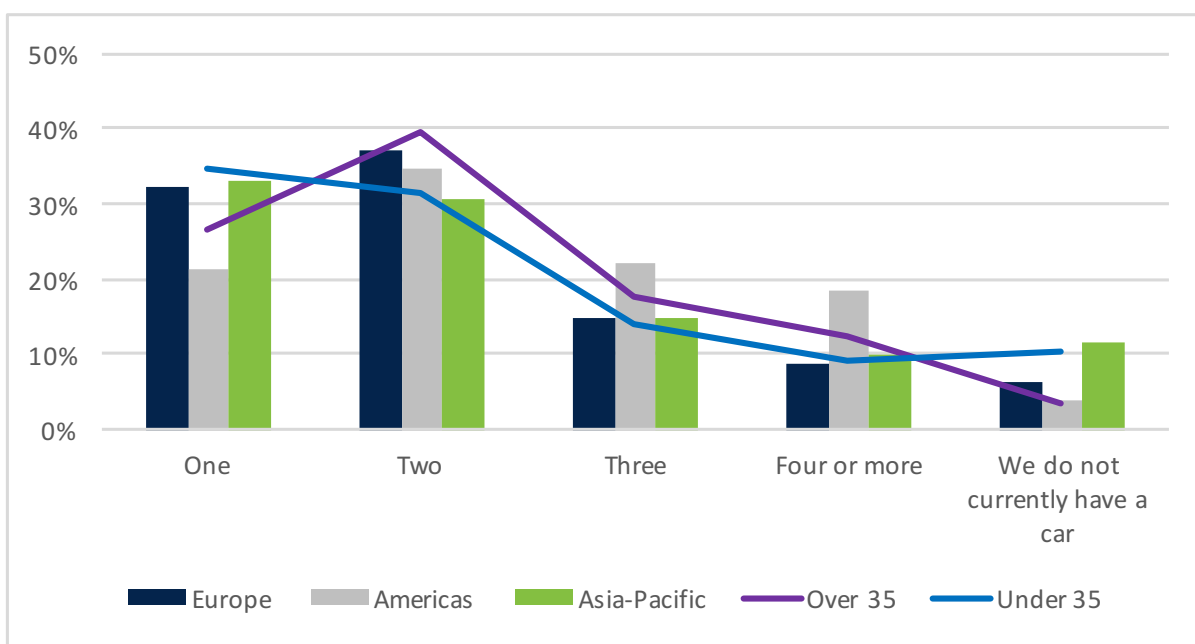
WEC fans do not follow other sports in any great numbers; they are motorsport purists in this regard (Chart 1.4).

**Chart 1.4 | WEC fan interest in other sports**



WEC delivers a highly desirable, affluent audience with 20% of fans being business owners, senior management or professionals. Average annual income stands at \$68.5k, with high household car ownership - 93.5% of WEC fan households owning at least one car, and an average of 1.95 vehicles per household (Chart 1.5).

**Chart 1.5 | WEC fans - Household car ownership**



Ford (17.6%), Volkswagen (16.2%), BMW (12.6%), Toyota (12.2%) and Renault (10.1%) are the most popular brands among WEC fans.



## SECTION 2

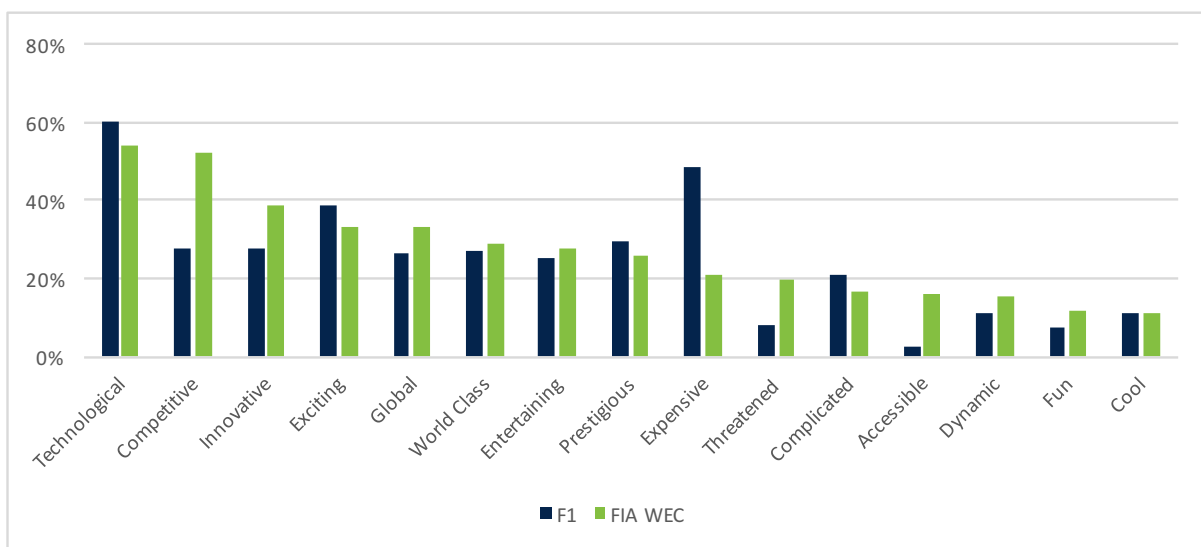
## BRAND HEALTH

## Headlines

- > Overall WEC Brand Health very positive, although only 20% of fans believe the series is healthier than 3 years ago
- > Top 5 WEC attributes – Technological, Competitive, Innovative, Exciting and Global
- > Fans confirm WEC features the best cars, is a proven platform for road car innovation and has the right balance of sport and entertainment
- > Fans want WEC to continue to deliver exciting, close racing in state of the art cars

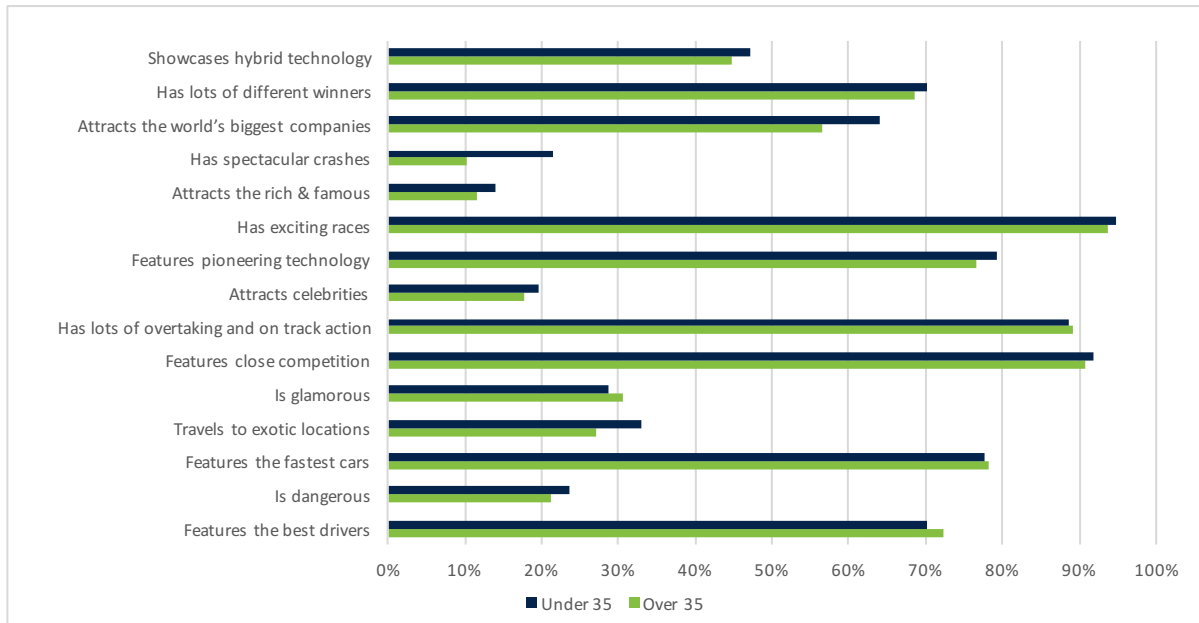
Fans were asked to state the 5 most accurate descriptions of WEC from a list of 37 attributes. WEC fans recorded very positive brand attributes. Included for comparison are results drawn from the 2017 F1 Study; WEC is viewed by fans as more competitive, innovative, international, world class, entertaining, accessible and fun, as well as considerably less expensive than F1 (Chart 2.1).

Chart 2.1 | WEC & F1 brand attributes (2017)



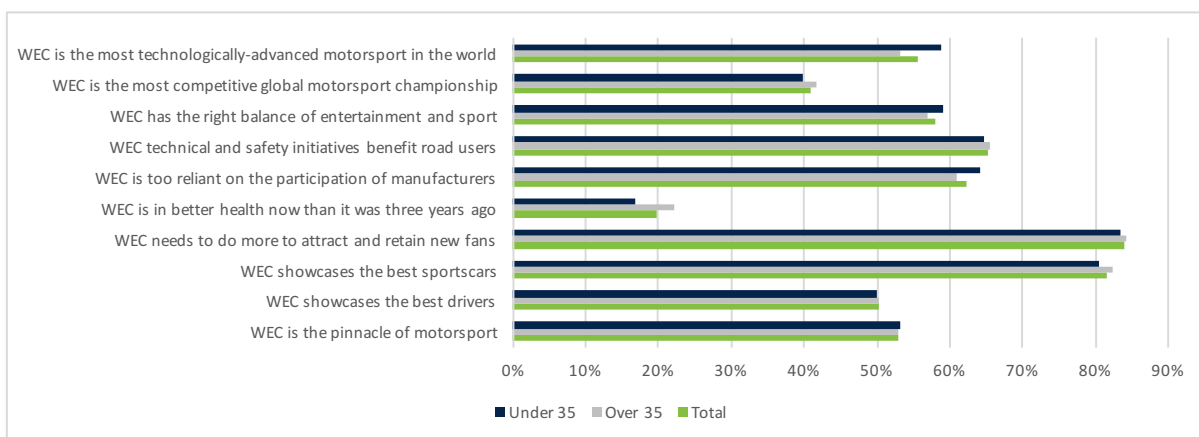
Consistent with the purist approach of WEC fans; their interest is focused on on-track action with the need to maintain exciting, close racing in state of the art machinery with lots of overtaking and on-track action at the top of their wish list. More lifestyle influences like glamour, celebrity, exotic locations are viewed as far less important (Chart 2.2).

Chart 2.2 | WEC key features for fans (2017)



WEC fans believe that the sport is currently delivering against a number of key criteria as both a sporting and entertainment platform, featuring the world's fastest and most technically advanced machinery. However, they reinforce the need for WEC to continue its work in recruiting a newer, younger audience, while sounding a note of caution that the championship is too reliant on manufacturers and is not as healthy as it was 3 years ago (Chart 2.3).

Chart 2.3 | WEC current fan health rating



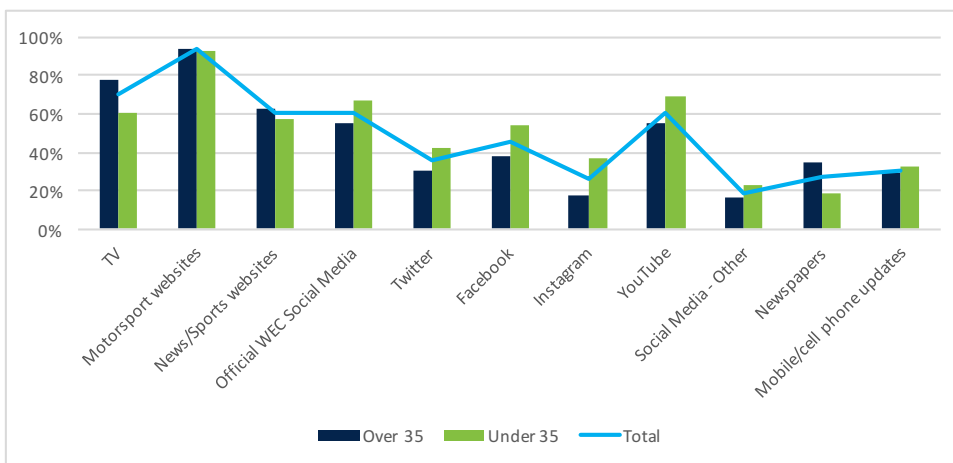
## SECTION 3

## WEC FAN ENGAGEMENT

## Headlines

- > 94% of fans rank WEC as one of their preferred series, ranking it #1 ahead of all other championships (See Chart 1.3)
- > Motorsport websites and Official WEC social media platforms rank above TV as their top sources for news and information.
- > WEC is attracting a highly engaged audience, with 55% attending a live motorsport event in the past 12 months
- > Fans are accessing a broad range of digital and social media to consume WEC content
- > Official WEC channels especially YouTube record high (60%+) levels of usage
- > Among the emerging, younger WEC audience online streaming and on demand coverage overtake TV as preferred future viewing platform
- > Over 60% of WEC fans express a willingness to pay for additional WEC content in the future

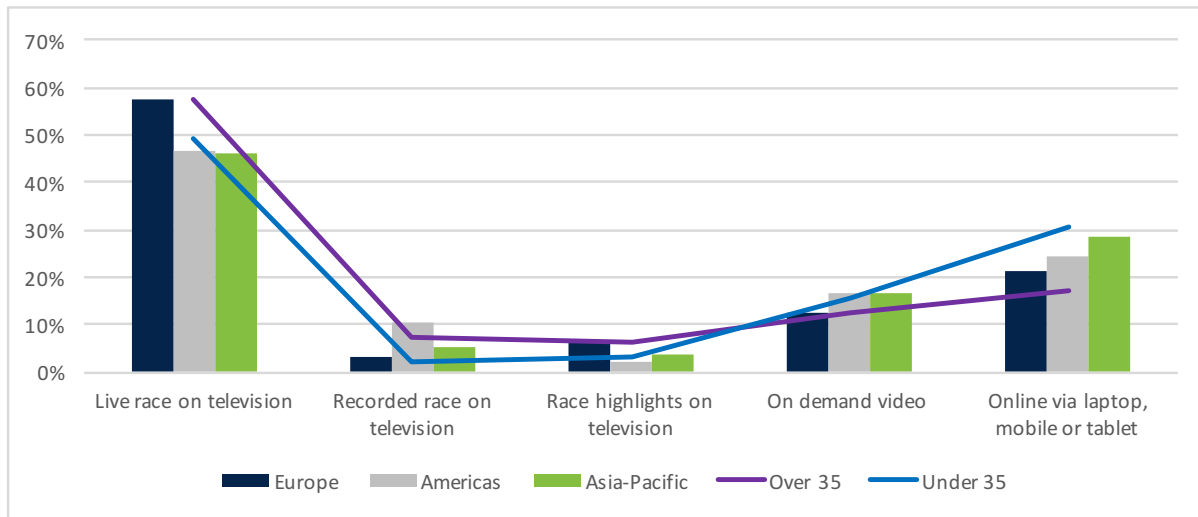
Chart 3.1 | Current WEC media consumption habits



Current media consumption among WEC fans displays a clear age profile divide, the younger, emerging WEC audience is moving away from traditional TV towards digital and social media channels for following the championship (Chart 3.1).

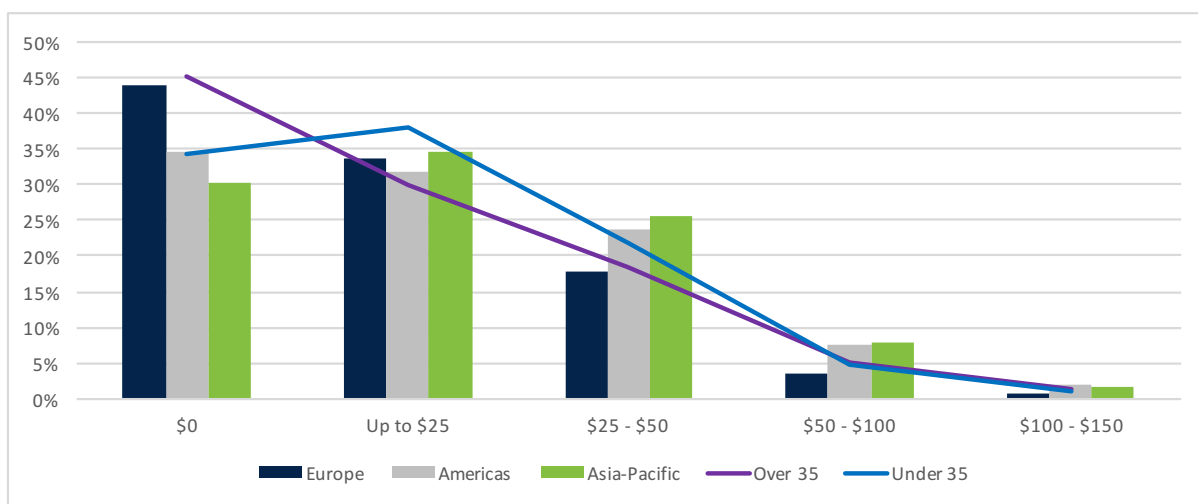
Reflecting changing media consumption habits, the percentage of fans preferring live TV broadcast among under 35s and all fans in America and Asia-Pacific has dropped below 50%. Online streaming and on demand services are set to overtake traditional TV as the preferred viewing platform for WEC fans (Chart 3.2).

**Chart 3.2 | WEC preferred future viewing platform**



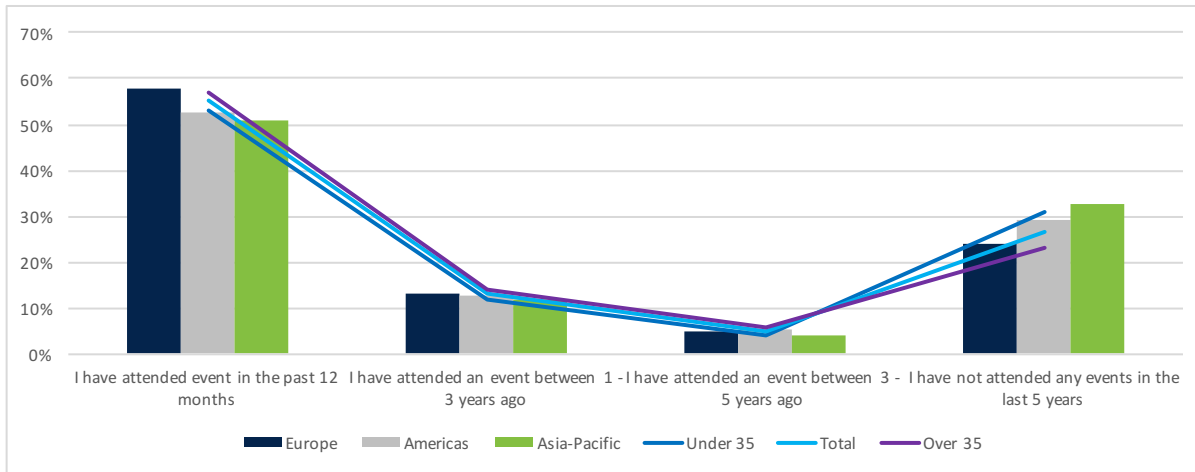
Over 60% of fans indicated they would be prepared to pay additional WEC content, with under 35s (65.7%) and fans in America (65.4%) and Asia-Pacific (69.7%) most likely to pay for content (Chart 3.3).

**Chart 3.3 | Fans willingness to pay for WEC broadcast content**



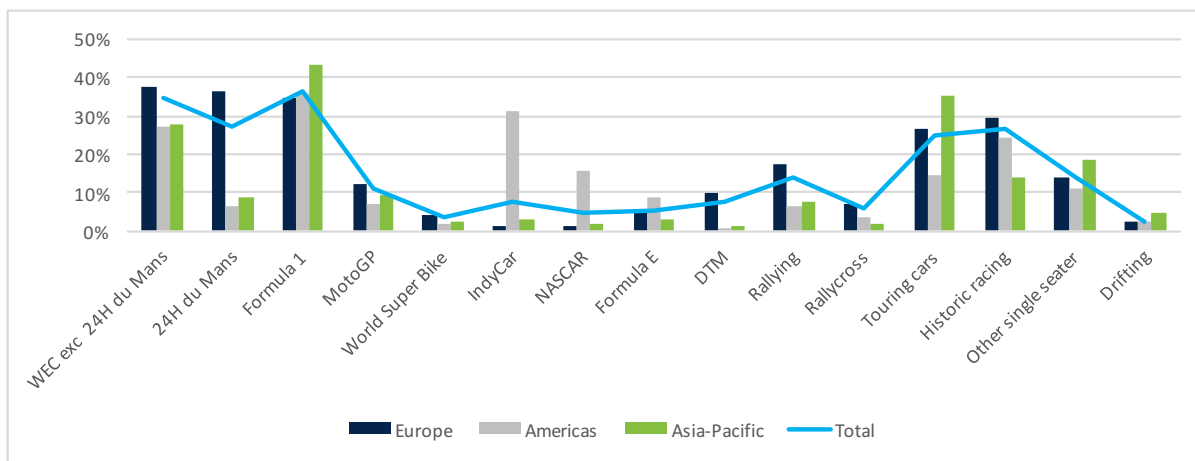
WEC fans are very active; with over half (55%) attending a live event in the past 12 months (Chart 3.4).

**Chart 3.4 | Motorsport event attendance 2016-17**



24 Heures du Mans was the single most attended event in the past year with 27.4% attending, 34.5% of fans attended another WEC event in the past 12 months with 36.2% of the audience attending an F1 race. Historic racing (26.6%) and Touring Cars (25.0%) also proved popular among fans (Chart 3.5).

**Chart 3.5 | WEC fans event attendance 2016-17**



## SECTION 4

## THE SPECTACLE OF WEC

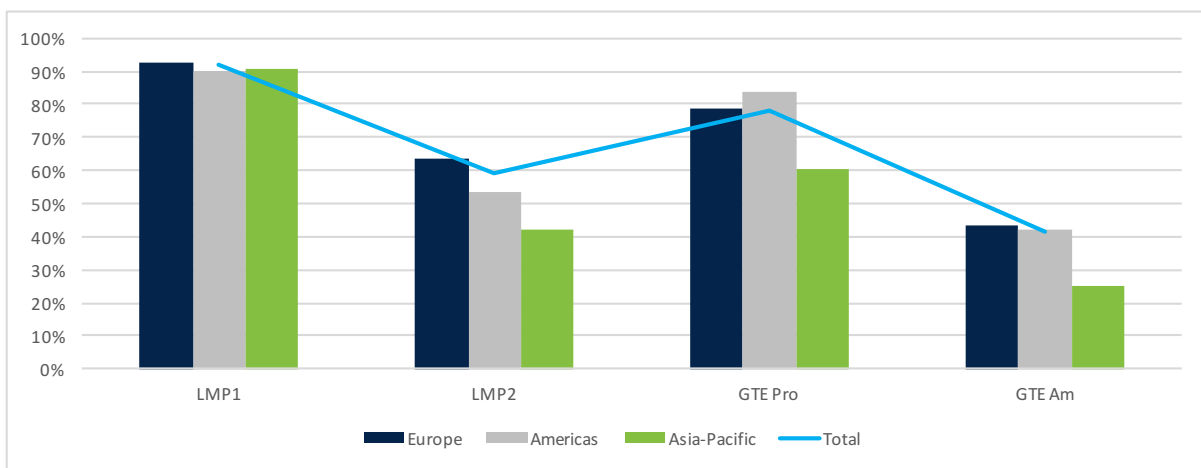
## Headlines

- > WEC's diversity is a key differentiator for fans; the range of categories, formats, manufacturers and events is a major attraction.
- > LMP1 is most followed individual category but nearly 80% of fans actively follow GT classes
- > Fans want an 8 – 10 race WEC season
- > Races at Le Mans, Fuji, Sebring, Silverstone and Spa have global appeal

A key differentiator for WEC and the source of its global appeal for fans is diversity.

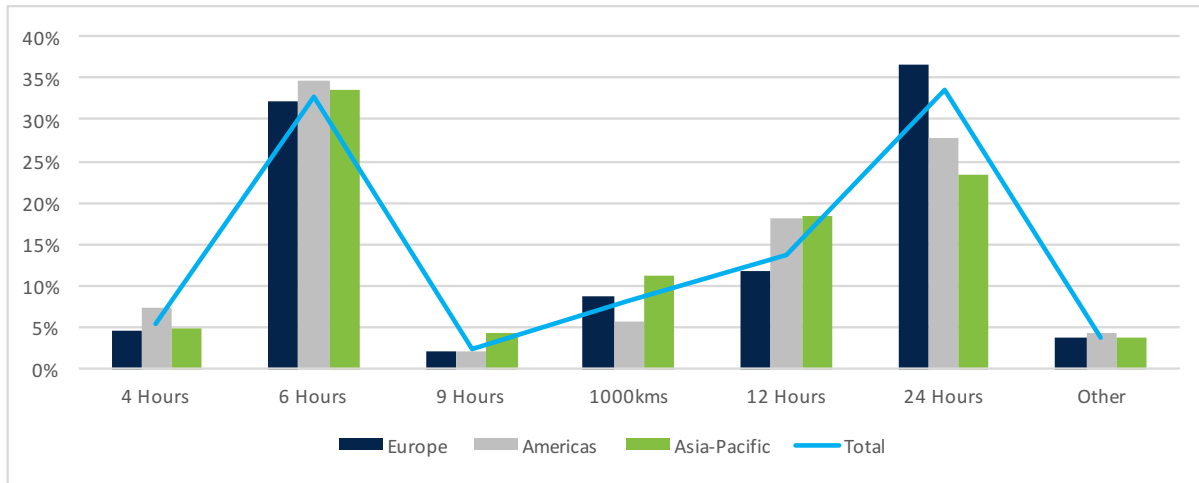
In terms of categories, LMP1 is the most followed (90%) however GTE Pro is actively followed by nearly 80% of all fans (Chart 4.1).

Chart 4.1 | Fan following by WEC category



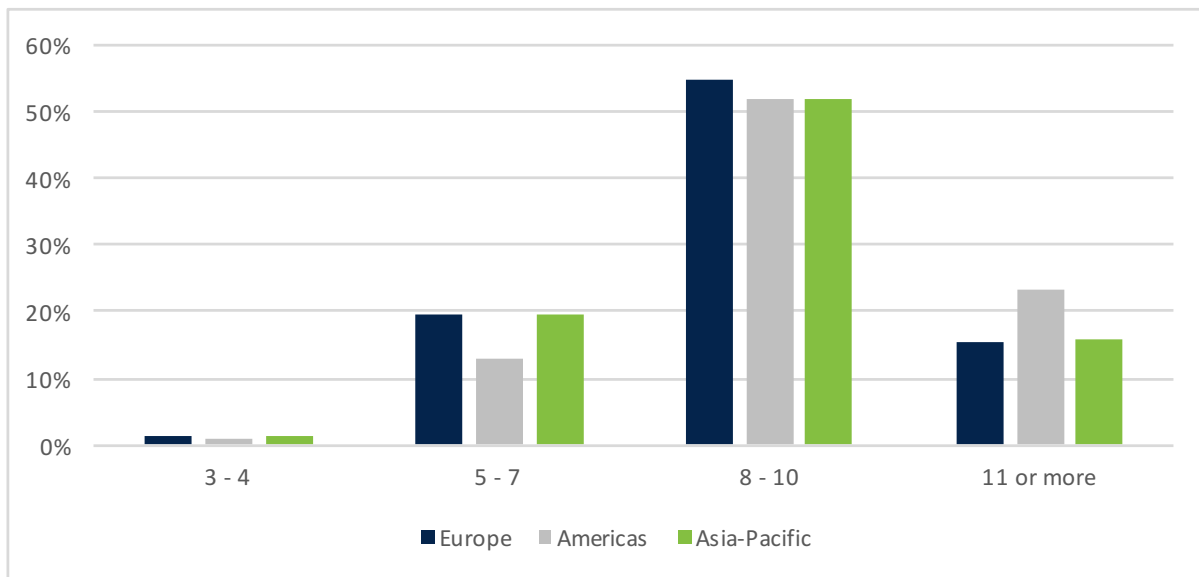
Fans welcome a season with several different race distances / durations (Chart 4.2).

**Chart 4.2 | Fans preferred race duration**



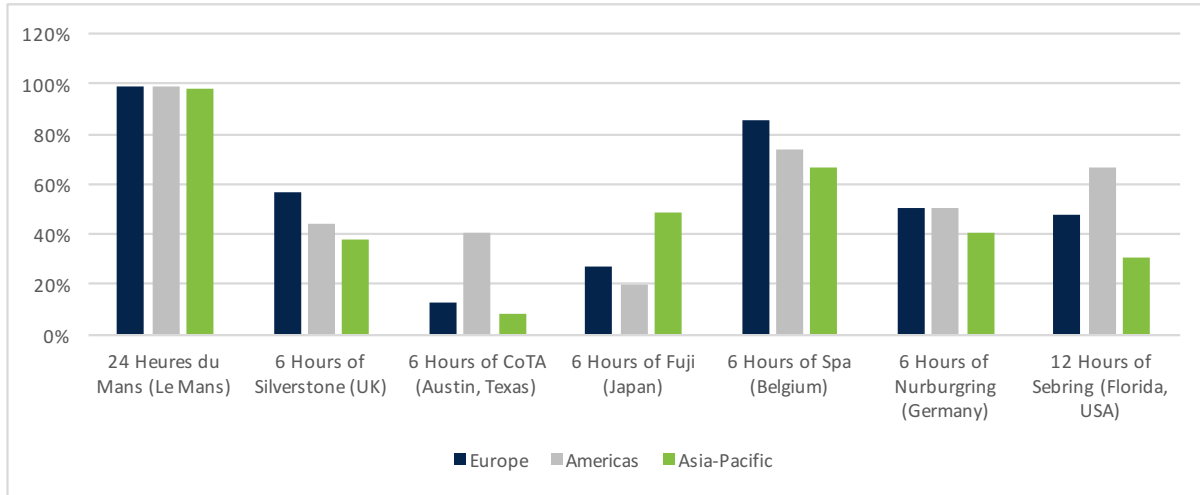
Fans provided a clear indication of their preference for an 8-10 WEC championship season (Chart 4.3).

**Chart 4.3 | Preferred number of races per season**



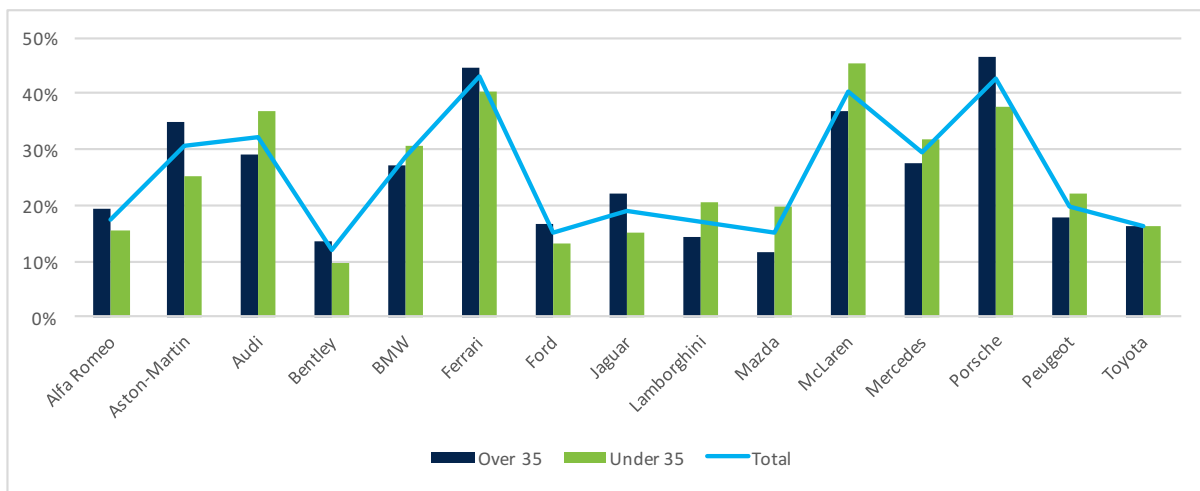
There is a small group of current and historic events that enjoy global support; this is complemented with regional support for events in the Americas and Japan (Chart 4.4).

**Chart 4.4 | Fans ranking of WEC event importance**



Fans were asked to specify the top 5 manufacturers they would like to see compete in WEC in the future. They showed support for a large number of manufacturers. Ferrari, Porsche and McLaren were the top 3 manufacturers highlighted. Younger fans (under 35) placed McLaren as their #1 most wanted manufacturer (Chart 4.5).

**Chart 4.5 | WEC fans preferred future competitors**





## SECTION 5

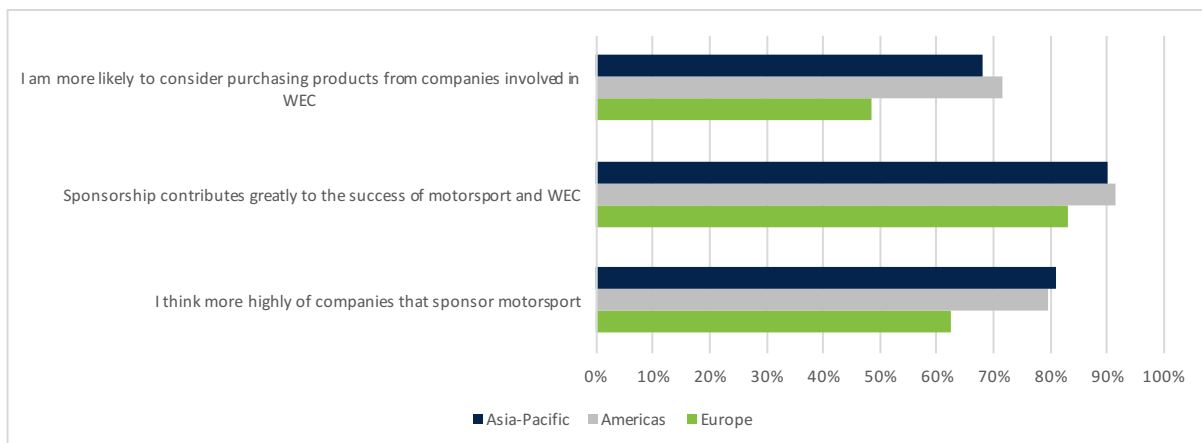
## SPONSORSHIP

## Headlines

- > WEC fanbase recognise the positive contribution made by sponsors
- > WEC fans are more likely to consider sponsors products above others
- > WEC manufacturers enjoy the highest levels of brand recall
- > Official WEC partners also score highly

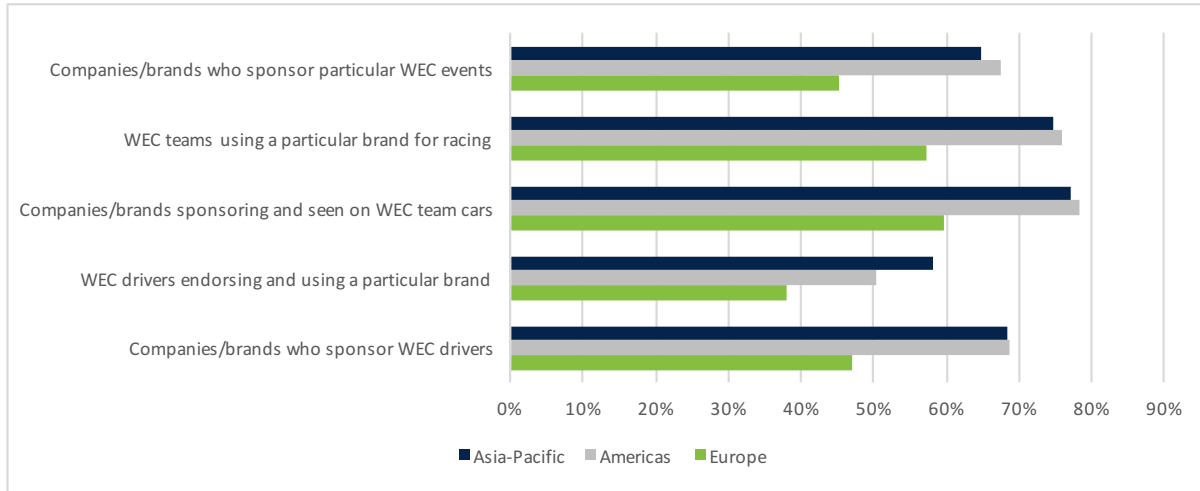
Over 85% of WEC fans believe sponsors contribute to the success of the championship, they also think more highly of sponsors and are more likely to purchase their products. Fans in Europe are less positive to sponsors than those in Americas and Asia-Pacific (Chart 5.1).

Chart 5.1 | Fans attitude to WEC sponsorship



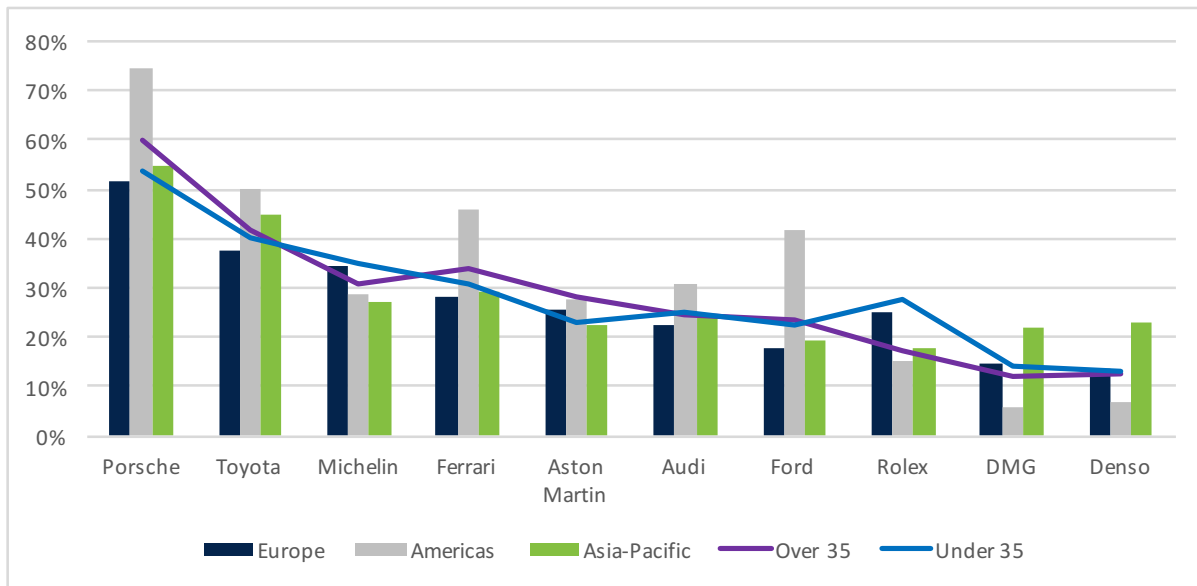
WEC sponsorship has a positive effect on fans purchasing behaviour with fans in Americas and Asia-Pacific most affected. On-car branding has the largest positive impact on behaviour (Chart 5.2).

**Chart 5.2 | Influence of brand positioning on purchasing behaviour**



When asked to name their top 5 WEC-related brands; fans response was dominated by manufacturers and official WEC partners. The Top 10 'most recalled' brands are comprised of 6 WEC competitors; 2 leading LMP1 team sponsors and 2 Official WEC Series partners (Chart 5.3).

**Chart 5.3 | Spontaneous brand recall by region**







**With Thanks:**

FIA WEC would like to thank everybody who took part in creating, delivering and participating in this global fan survey.

This includes all the drivers, teams, officials, circuits, promoters, partners and the 54,510 World Endurance Championship fans worldwide.

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