

2017 WEC GLOBAL FAN SURVEY

FAN REPORT





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 most especially, the 54,510 World Endurance Championship fans worldwide who took the time to give us their feedback.

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2017 WEC GLOBAL FAN SURVEY

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Official Partners



Official Manufacturers

PORSCHE

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2017 WEC GLOBAL FAN SURVEY

FOREWORD

Gérard Neveu
CEO, FIA World Endurance Championship

Dear friends and fellow fans

Endurance racing goes back to the very roots of motorsport, and indeed almost to the beginning of the automobile industry, and we knew that as fans, you are 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 you 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 all of you who participated and who shared with us your passion and commitment to our sport.

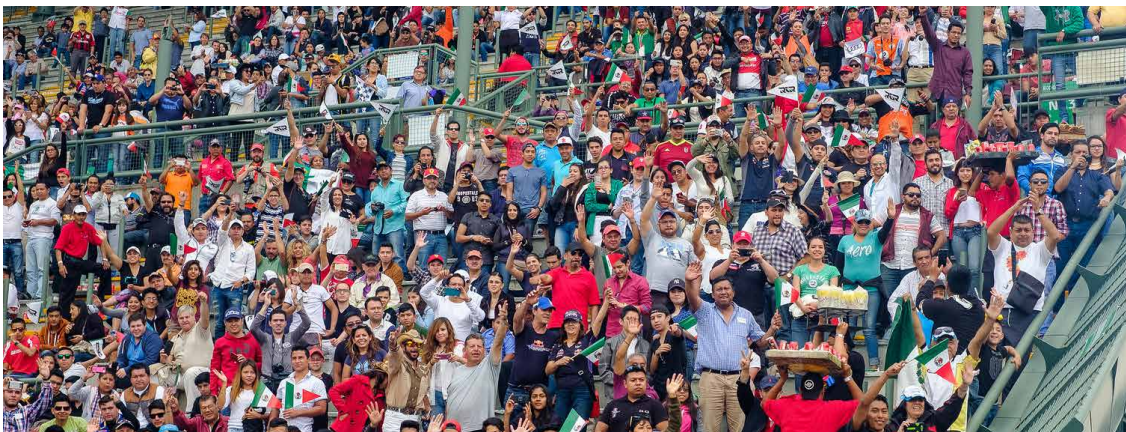
It is you, the fans, who inspire us to continue evolving and developing the WEC, and who support the different motor manufacturers and privateer teams, our competitors, in their participation at our events around the world. Endurance racing fans are some of the most knowledgeable in motorsport and you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

From your 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: you have spoken.

It was interesting to see a new, relatively young, digitally-engaged audience emerging 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 from you 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 your feedback, 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 but the opinions given by you will contribute greatly in helping us to improve and move the championship forward in the years to come.



2017 WEC GLOBAL FAN SURVEY

EXECUTIVE SUMMARY

Charles Bradley

Global Editor in Chief, Motorsport Network

In September 2017, the 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 the 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 the 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. You are not active followers of other sports, but you do follow motorsport, especially F1 closely. You are affluent, active event attendees with higher than average income and car ownership.

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

You are avid fans with 95% viewing the WEC as one of your preferred motorsports; the crossover with Formula 1 is very high (88.7%). You are extremely information hungry and are using a broad range of media to consume content. The emergence of a younger WEC audience is driving social and digital media engagement to previously unseen levels.

Specialist websites, not TV, are your #1 source for content and over 60% of you are actively using official WEC social media platforms especially YouTube, which now rivals traditional TV in its usage.

In the future, you are increasingly looking to online streaming and on demand video to satisfy your viewing needs.

Among the WEC's under 35 fanbase, online demand is set to overtake traditional TV as your #1 viewing choice. The majority of you (60%+) show a willingness to pay for additional content in the future.

Much of the WEC's appeal stems from its diversity; you are attracted to the WEC for the range of categories, events, race durations and manufacturers; you 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.

You value the contribution made by sponsors and show a clear preference for considering sponsors' products above others.

2017 WEC GLOBAL FAN SURVEY

METHODOLOGY

Nigel Geach

Senior Vice President - Motorsport, Nielsen Sports

Nielsen Sports is delighted to have worked with the FIA World Endurance Championship in engaging with the global WEC community, capturing their opinions and providing a platform for them to make their views heard.

The fans are a key part of what makes motorsport and the WEC so special, and understanding their perspectives is crucial in helping to shape the future of the WEC.

The 2017 Global WEC Fan Survey was created and translated into 10 languages and hosted via a common, multilingual website at www.wecsurvey.motorsport.com.

Over 54,000 of you, from 179 countries shared your feedback over a 25-day fieldwork period between the 22nd September and 17th October 2017.

The willingness of the WEC, as a promoter, to open itself up to you and your eagerness to engage and respond, is incredible.

Actively seeking feedback from such a large and diverse fan base, at a time of proposed sporting changes, is a true testament to the Championship promoter's

willingness to put you at the heart of future sporting developments.

As an initial study exercise capturing the views of over 50,000 of you is a remarkable achievement making this the most comprehensive global survey ever conducted among motorsport fans outside of Formula 1.

This approach and your involvement has delivered invaluable insight across a broad range of subjects spanning races, media consumption habits, sponsorship and brand health.

We are delighted to have been involved in the process and applaud the WEC for their openness. These findings provide invaluable, evidence-based insight for future decision-making and will serve to strengthen the sport even further moving forward.

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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

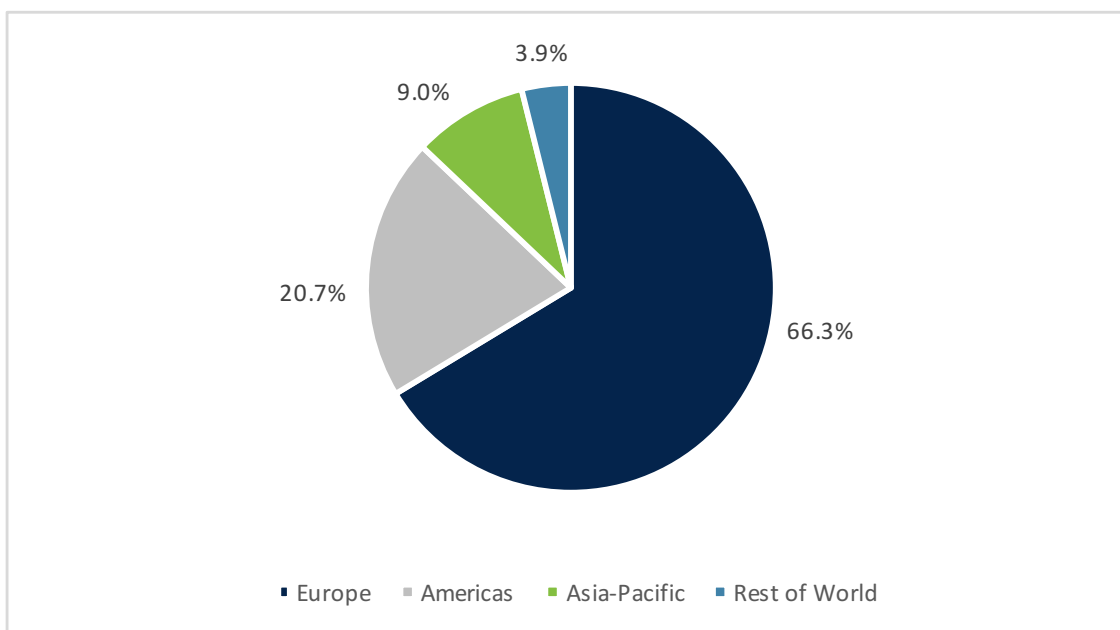
Headlines

- > Over 54,500 fans took part, from 179 countries worldwide
- > Average age of respondent was 38 years and 5 months
- > 43.4% of you are aged under 35 showing WEC's appeal to Millennial audience
- > 20% of you hold Senior Management or professional positions
- > There is a strong cross over between WEC and Formula 1
- > You are an affluent audience with average of 1.95 cars per household

Response was received from fans in 179 countries worldwide (The United Nations officially recognises 203 countries worldwide). The top 5 countries for response were UK, USA, France, Germany and Italy, combined these 5 markets accounted for 58.5% of total response.

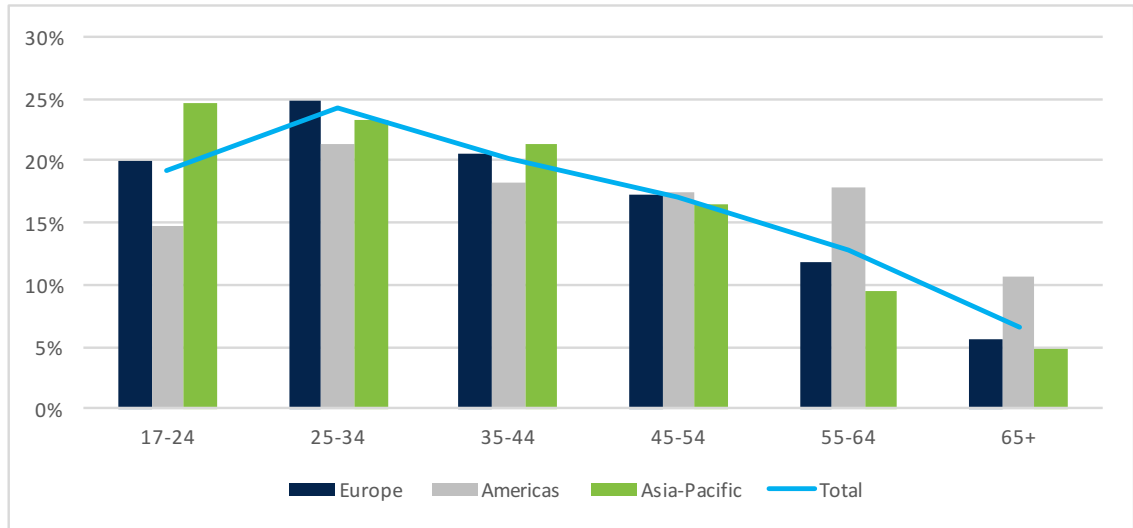
Reflecting WEC's heritage, the response from fans in Europe was the highest at 66% of the total audience. 20% of responses were received from North, Central and South America, with 10% from Asia-Pacific and 5% from outside of these 3 regions (see Chart 1.1).

Chart 1.1 | WEC Global Fan Study regional analysis



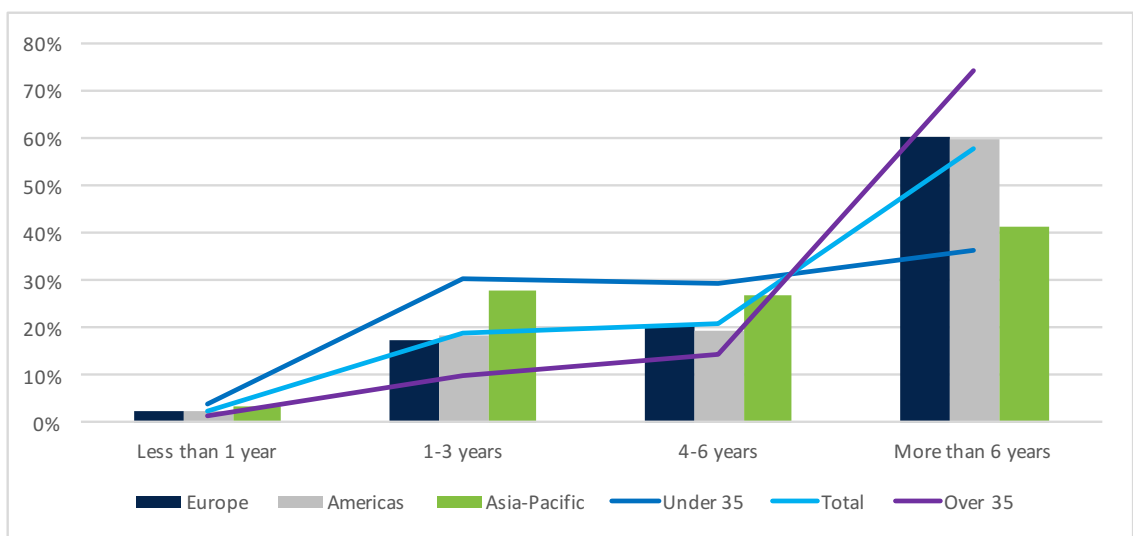
The average age of fans was 38 years and 5 months, with 43% of you aged between 17 and 34. WEC’s ability to appeal to a younger age demographic is one of the highlights of the study. This age group and their future interests provide a major opportunity for the championship and its partners. Asia-Pacific had the highest percentage of younger fans (17-34) at 47.9% with the Americas recording the lowest at 36.0% (see Chart 1.2)

Chart 1.2 | Age profile of WEC survey respondents



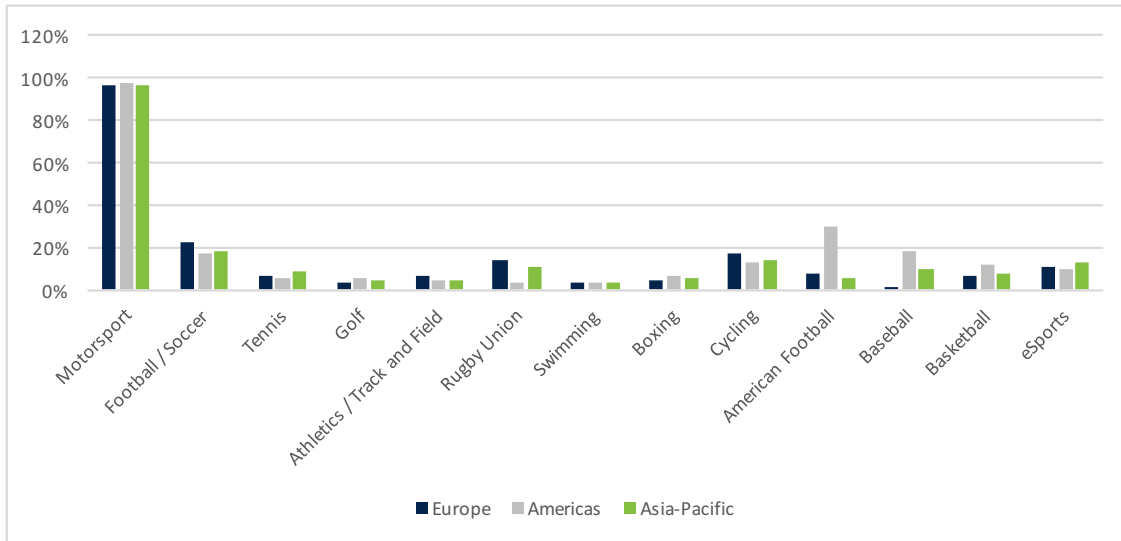
FIA WEC enjoys a very strong, loyal fanbase with over 80% of you following endurance racing for more than 4 years; however the championship’s appeal to a new, younger audience is evidenced by the fact that over 35% of you are aged under 35 and have been following FIA WEC for less than 3 years (see Chart 1.3).

Chart 1.3 | Length of following



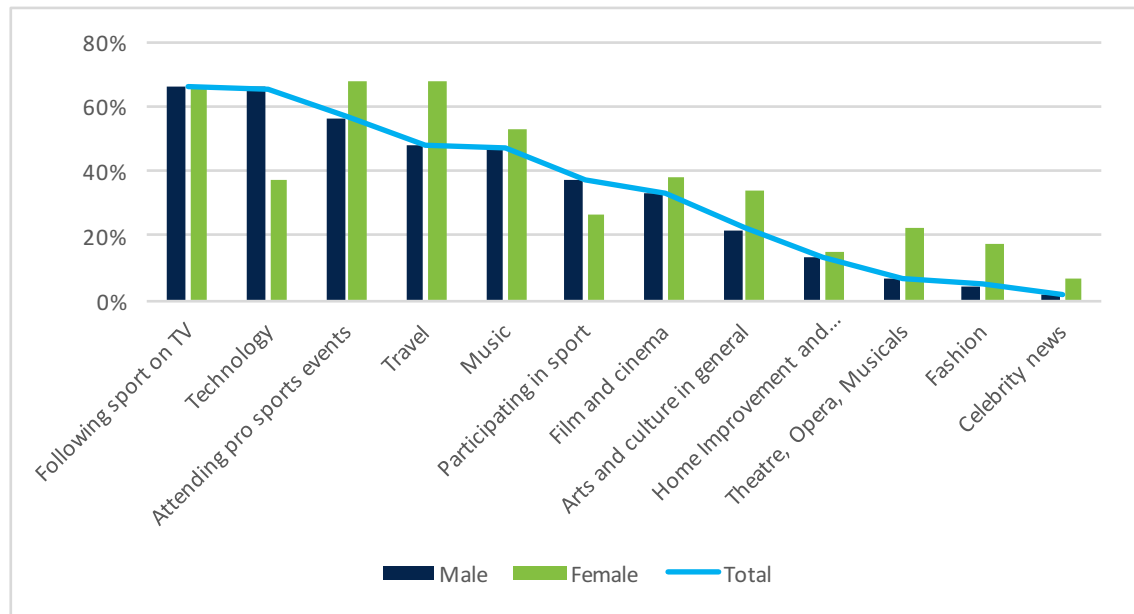
You are dedicated motorsport purists, with little interest in other sports and pastimes. Football is your next most popular sport, but only 21.6% of you actively follow (see Chart 1.4).

Chart 1.4 | WEC Fans - Other sporting interests



Reinforcing the purist nature of your interest, you show the greatest appetite for watching, participating or attending motorsport events. You also show a big interest in Technology, Travel and Music (see Chart 1.5).

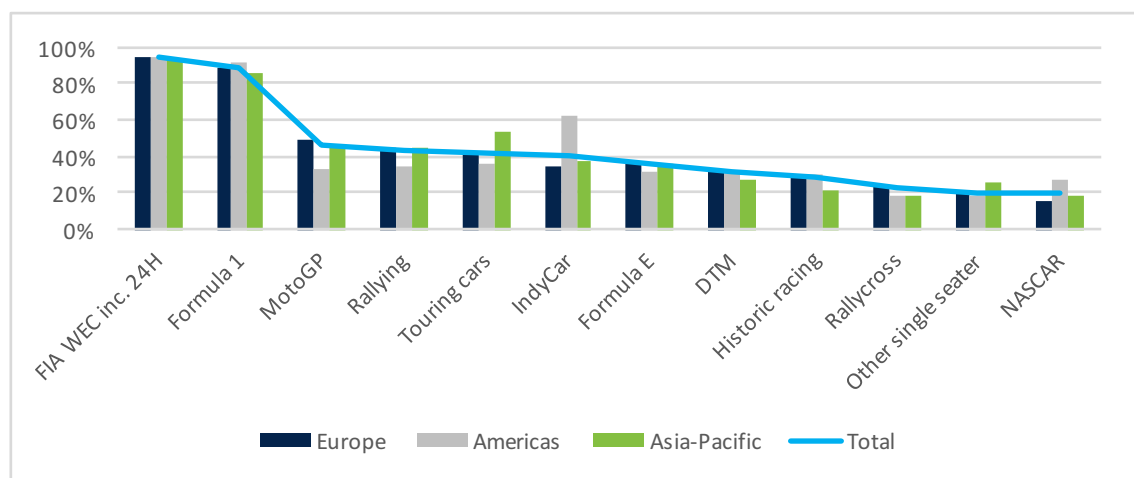
Chart 1.5 | WEC Fans - Other interests



We have seen in previous studies that WEC enjoys a strong following among Formula 1 fans with nearly 40% of F1 fans actively following WEC. This study confirms that the converse is also true; with nearly 9 in 10 of you actively following F1.

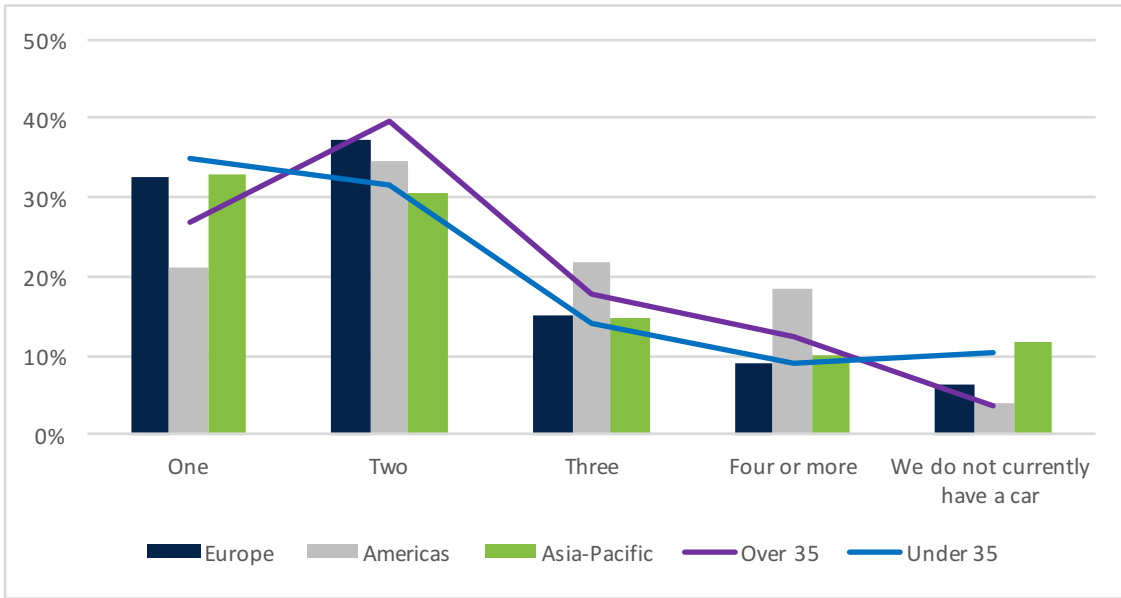
Beyond this, however, your interest in other forms of motorsport falls significantly with MotoGP (45.9%), Rallying (42.6%) and Touring Cars (41.8%) the next most followed. Among the American audience your interest in Indycar is high (62.0%) while NASCAR is considerably lower (27.6%) (see Chart 1.6).

Chart 1.6 | WEC Fans - Motorsport following



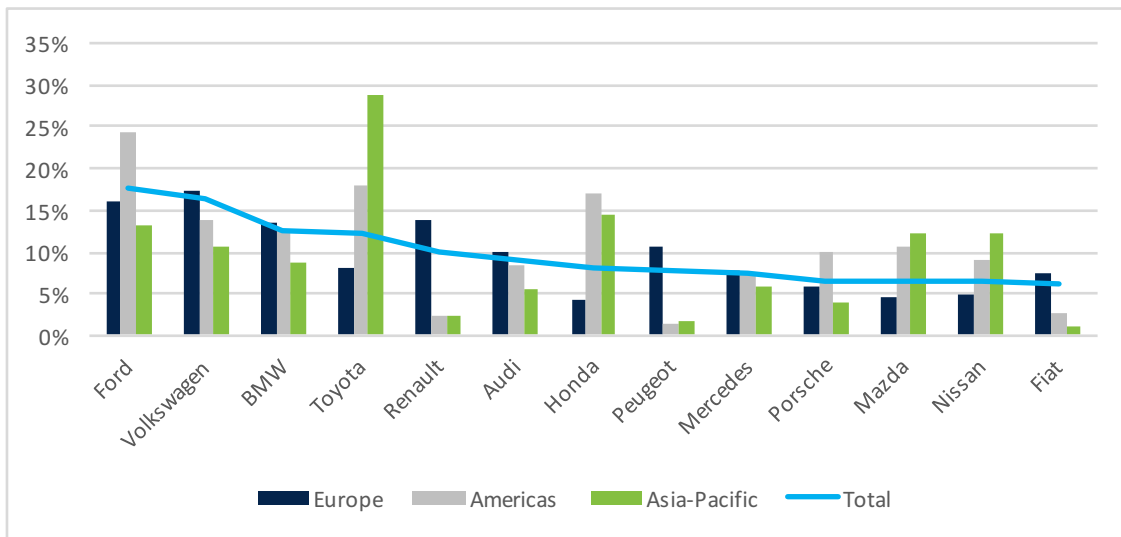
WEC delivers a highly, desirable audience with 20% of fans being business owners, senior managers or professionals. Based on the feedback your average annual income is \$68.5k. Household car ownership is high with 93.5% of you owning at least one car, and globally you have an average of 1.95 vehicles per household. (see Chart 1.7)

Chart 1.7 | WEC Fans - Household car ownership



The leading vehicle brands owned by you are Ford (17.6%), Volkswagen (16.2%), BMW (12.6%), Toyota (12.2%) and Renault (10.1%) (see Chart 1.8).

Chart 1.8 | WEC Fans - Car ownership by brand





SECTION 2

THE MEDIA LANDSCAPE

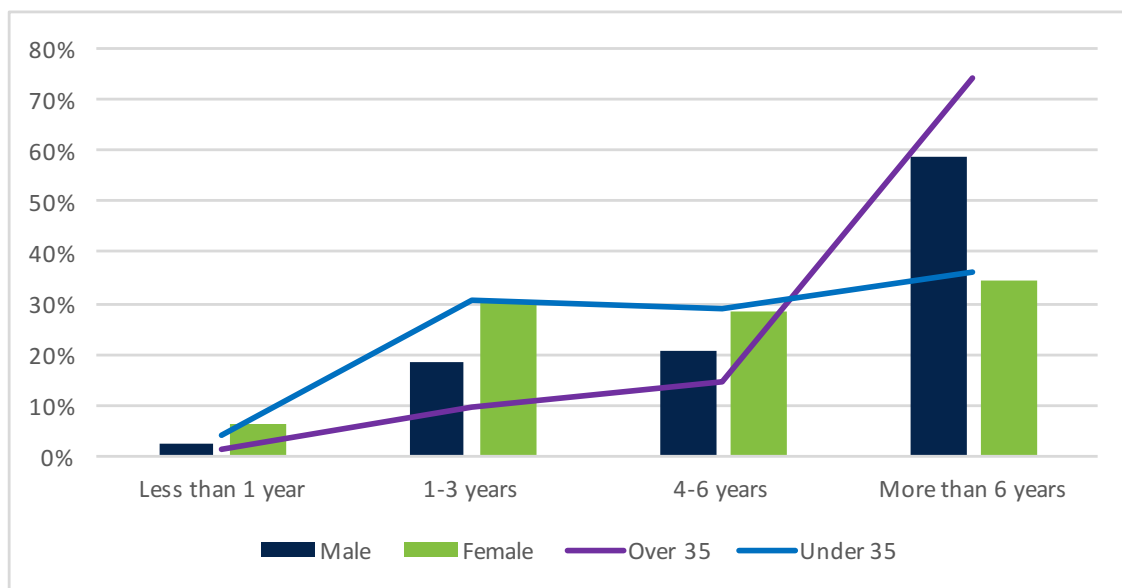
Headlines

- > Over 75% of you have been following the sport for 4 years or more
- > Dedicated Motorsport websites (93.4%), TV (69.9%) and YouTube (61.0%) are your top 3 media channels for content
- > When viewing 50% of you watch the race in full
- > Your demand for online streaming & video is growing rapidly
- > Among the under 35 age group and fans in Asia and Americas your desire for online & on-demand viewing now matches TV
- > Globally 60% of you are prepared to pay for exclusive content in the future

Nearly 80% of you have been following endurance racing for 4 or more years.

This figure falls to 66% and 63% among under 35s and female fans respectively. This provides further evidence on the health of WEC, clearly demonstrating that while the sport has gained a loyal fanbase it is attracting increasing numbers of younger and female fans (see Chart 2.1).

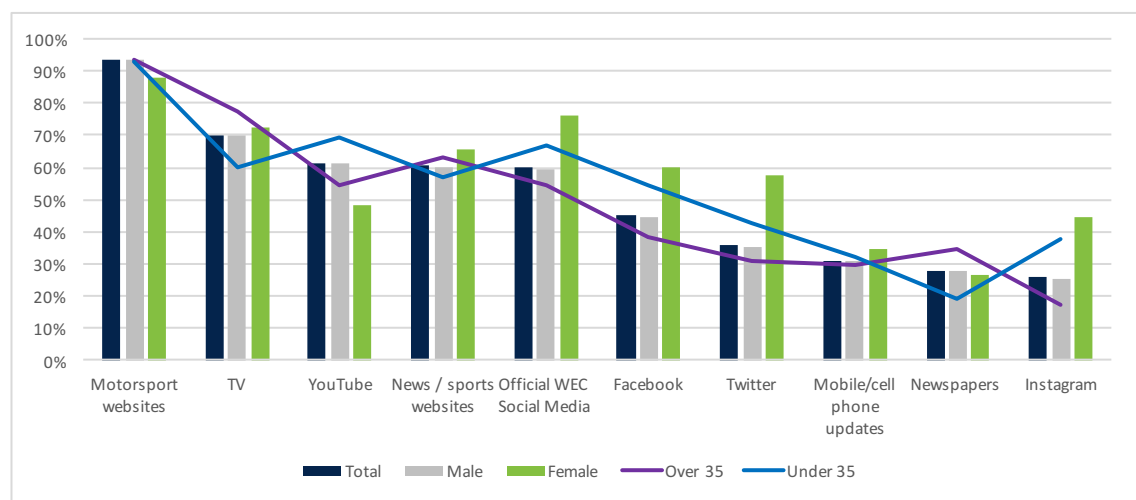
Chart 2.1 | Length of WEC following by age & gender



Television remains an important media channel, with 70% of you following the sport on TV in the past year, this figure increases among the older age group (35+) in Europe and Americas. However, your overall use and preference for TV has been overtaken by dedicated motorsport websites as the #1 most used and preferred source of WEC news and information with 93% of you using specialist digital services for WEC content in the past year.

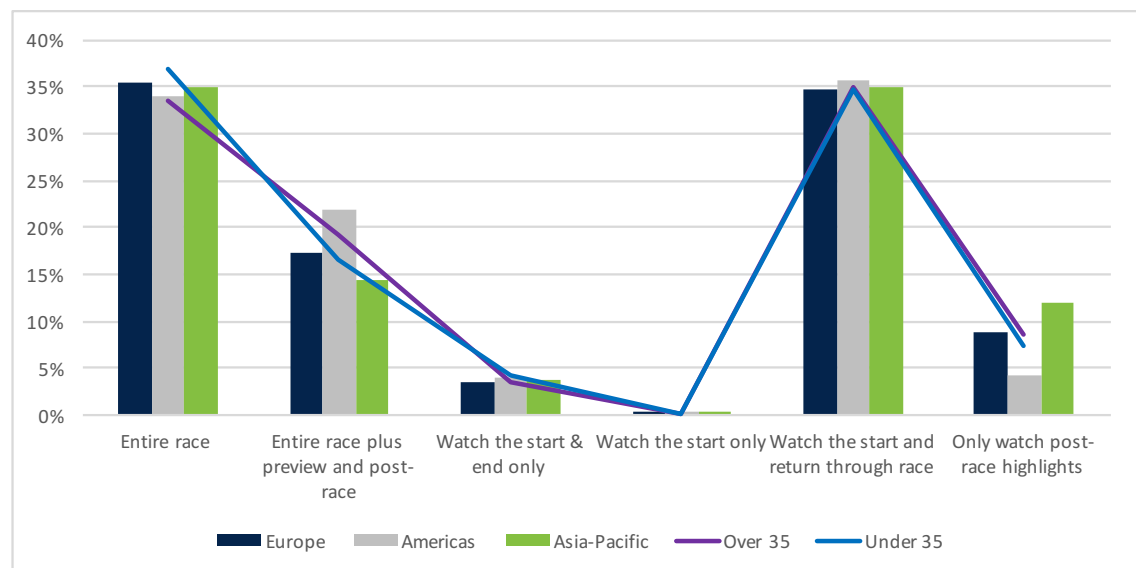
The WEC’s decision to embrace social media and most particularly distribute content via YouTube has been fully endorsed through this study. 61% of you are viewing WEC content via this platform in the past year. The use of WEC official social media platforms is particularly strong among female fans (76%) and those in Asia-Pacific reinforcing the evidence of a new, emerging, younger digitally-engaged WEC audience (see Chart 2.2).

Chart 2.2 | Fan media consumption of WEC content



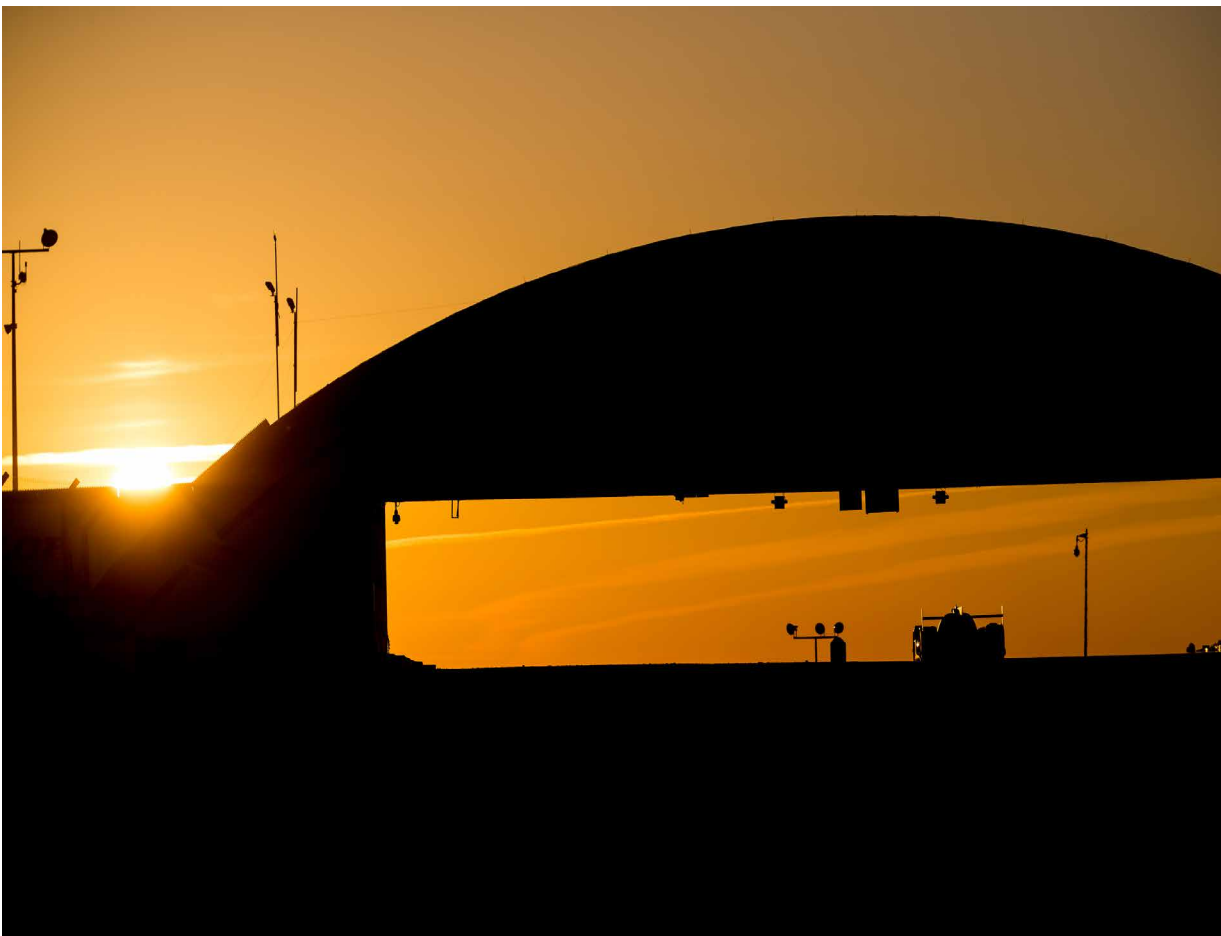
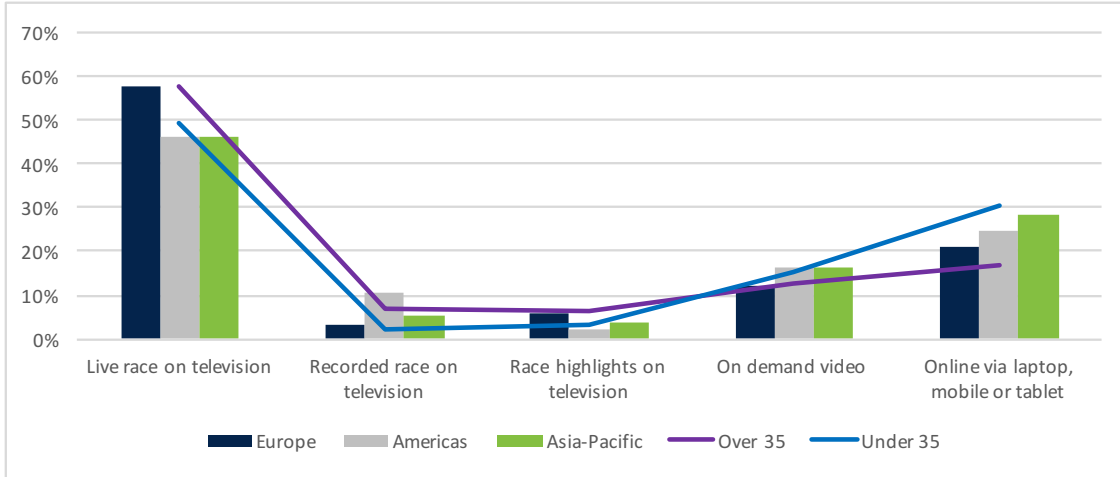
You continue to follow WEC events via broadcast media although, unlike other (motor)sports, the duration of the live WEC event means that viewing habits are different. While 53.1% of you watch the race in full, 34.7% of you watch the start and then return occasionally throughout the race (see Chart 2.3).

Chart 2.3 | Fans viewing of WEC TV broadcast content



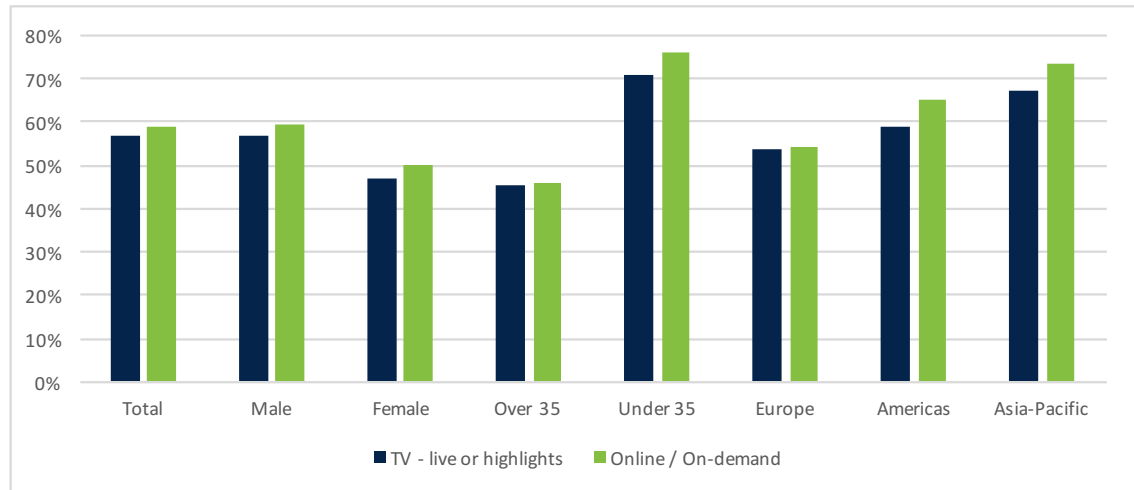
While live TV continues to be your #1 preferred broadcast platform (53.8%), the growing audience of younger, digitally-engaged fans is driving a fundamental shift in your viewing – with online streaming and on-demand video content now overtaking traditional TV as your preferred broadcast distribution platform for the future (see Chart 2.4).

Chart 2.4 | Fans future WEC broadcast viewing preferences



This is a landmark moment in (motor)sport - it is the first time the percentage of fans preferring live TV broadcast has dropped below that of non-TV digital platforms. (see Chart 2.5).

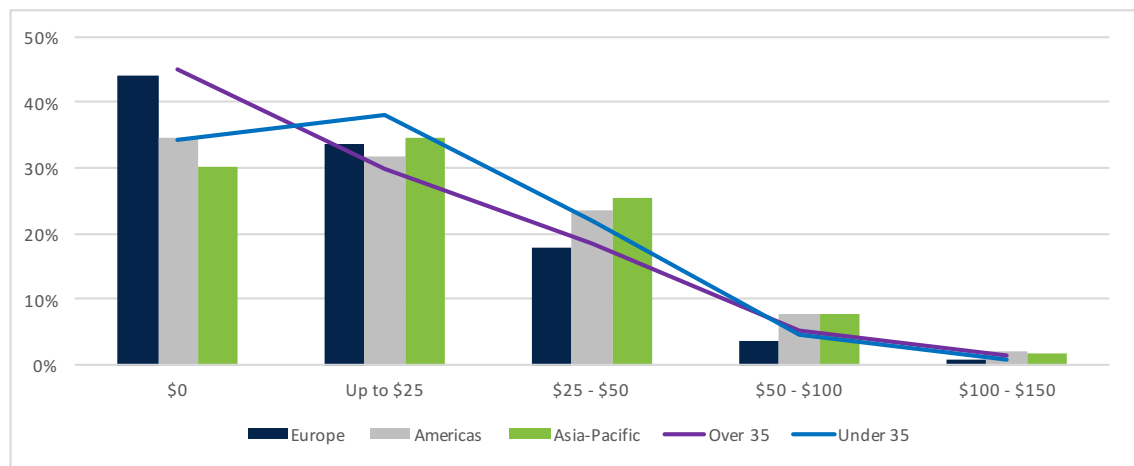
Chart 2.5 | TV vs Online/On-demand future WEC viewing



Alongside this increasing demand for online and on-demand content you show a willingness to pay for exclusive additional content. These two factors provide WEC with a clear opportunity for future content delivery.

Globally 60% of you indicated a willingness to pay for additional content, this was greatest among the under 35 age group (65.7%) and fans in America (65.4%) and Asia-Pacific (69.7%) (see Chart 2.6).

Chart 2.6 | Fans willingness to pay for exclusive WEC broadcast content



SECTION 3

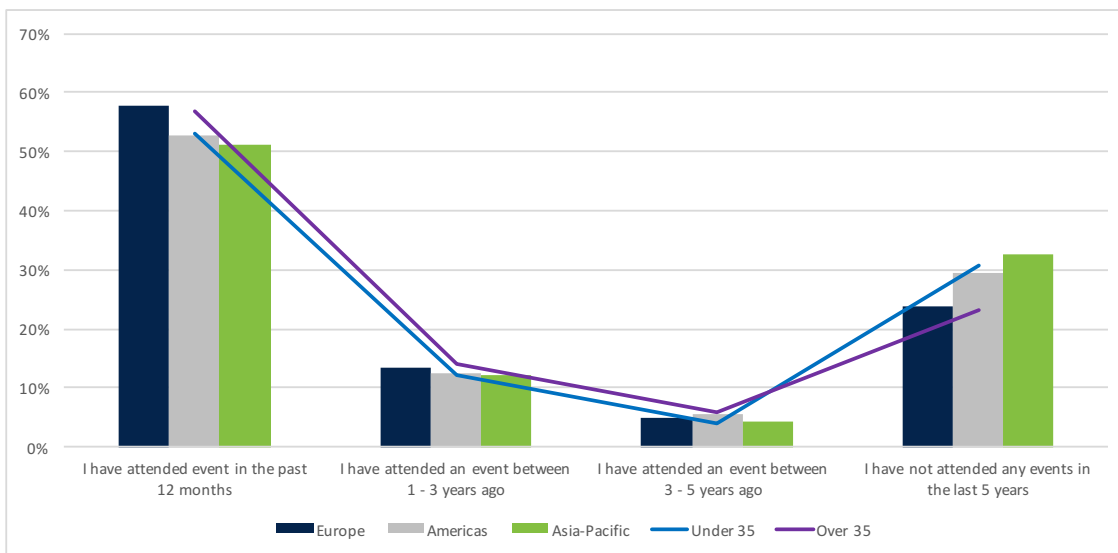
THE CALENDAR

Headlines

- > Over 55% of you attended a motorsport event in the past 12 months and nearly three quarters of you attended in the last 5 years
- > WEC races including 24H du Mans were the most attended events in the past year (61.9%), of which Le Mans accounted for 27.4%
- > 36.2% of you attended a Formula 1 event in past year
- > You want an 8 – 10 WEC race season
- > Six (6) events are critical to you: Le Mans, Fuji, Nürburgring, Sebring, Silverstone and Spa
- > You show a strong support for different race durations each season
- > You don't want changes to the race weekend format

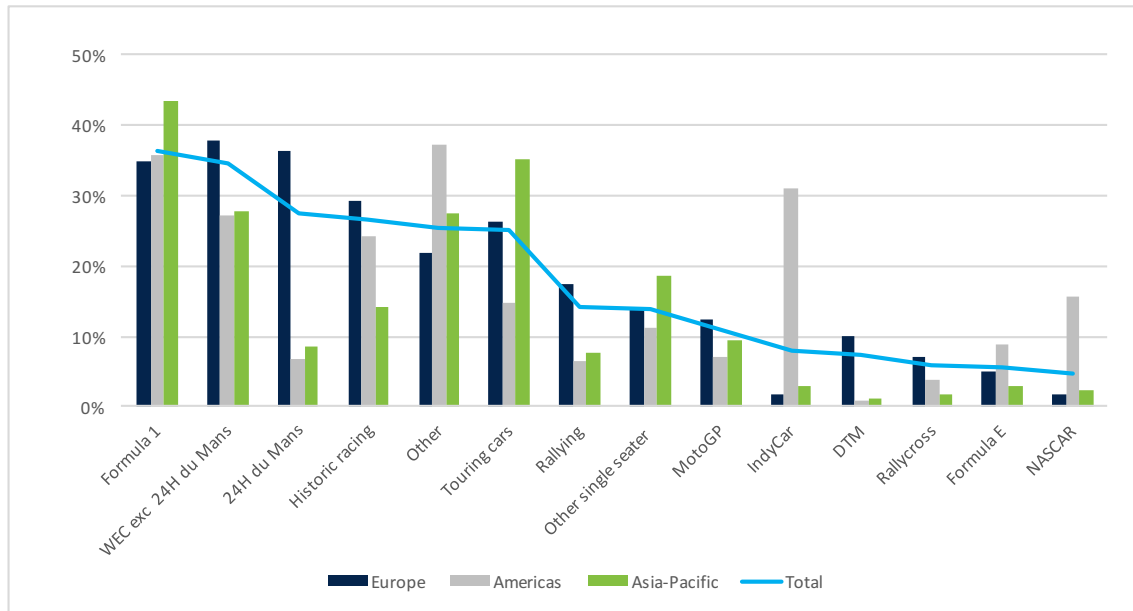
You are more likely to attend motorsport events than fans of other series previously studied; 55.2% of you attended a motorsport event in the past 12 months, of whom over 80% attended a WEC race. Race attendance was higher among female fans (66.7%), over 35s (56.7%) and European fans (57.8%) (see Chart 3.1).

Chart 3.1 | WEC fans motorsport event attendance (2016-17)



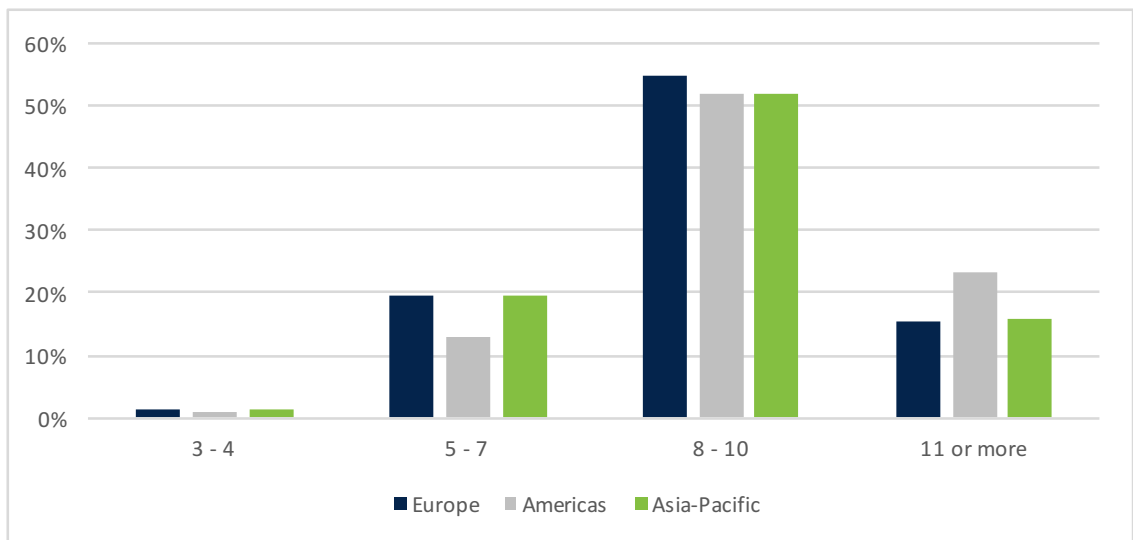
24 Heures du Mans was your single most attended event in the past year with 27.4% of you attending, 34.5% of you attended another WEC event in the past 12 months and 36.2% of you attended an F1 race in the past year. Historic racing (26.6%) and Touring Cars (25.0%) also proved popular (see Chart 3.2).

Chart 3.2 | WEC fans motorsport series attendance (2016-17)



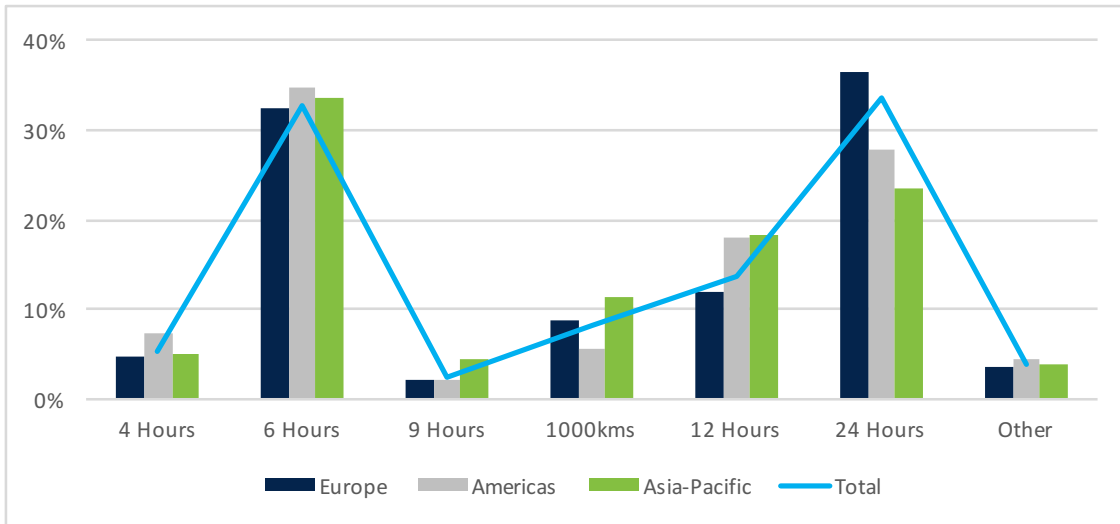
You have shown a clear preference for an annual 8-10 race WEC calendar (see Chart 3.3).

Chart 3.3 | Preferred number of WEC events per season



In addition, we asked you to provide feedback on a number of potential race distance changes, your feedback clearly showed a preference for the WEC season to feature a number of different race formats with 6 Hours (32.8%), 12 Hours (13.8%) and 24 Hours (33.6%) the most popular (see Chart 3.4 overleaf).

Chart 3.4 | Preferred WEC race duration



You were also asked to give your opinion on the most important WEC events.

Your response showed strong regional variances, although one event stood out with universal global support:

Global Le Mans (98.6%)

In addition to those events, regional support was as shown for the following events:

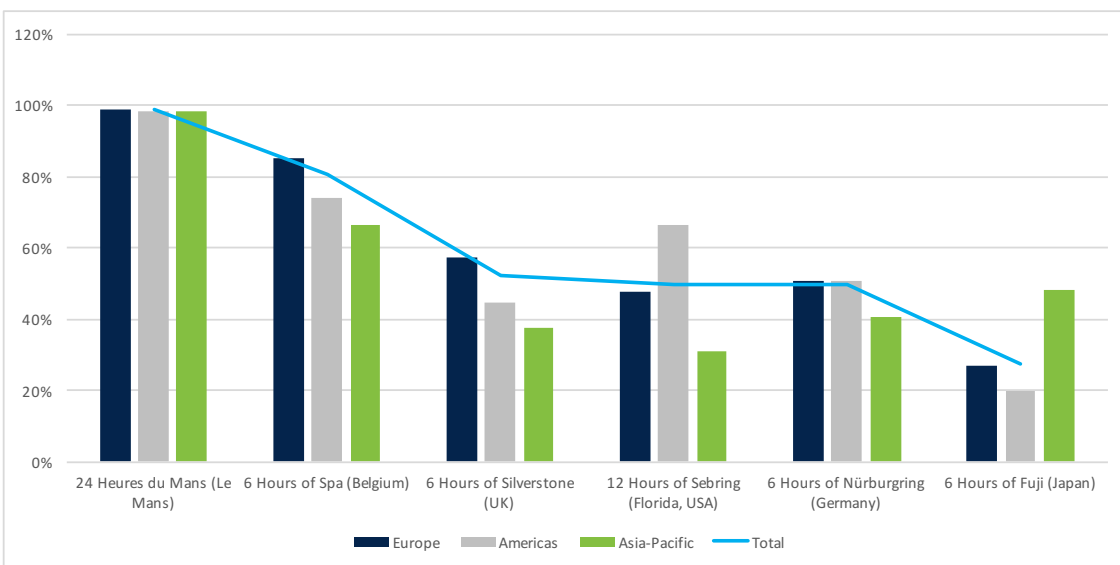
Europe As Global plus Silverstone, Spa and Sebring

Americas As Global plus Sebring, Spa, Silverstone and CoTA

Asia-Pacific As Global plus Fuji and Spa

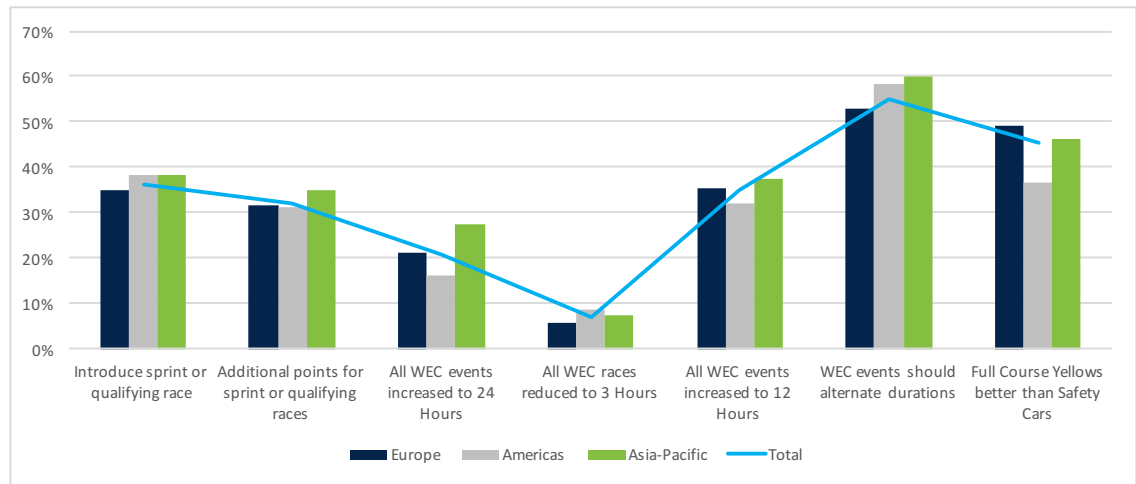
Analysis of your feedback by region is detailed below (see Chart 3.5).

Chart 3.5 | WEC Event importance



We also asked you to provide your feedback on a number of potential event changes; your over-riding response was supportive of the current event formats. You reiterated your desire to see different race distances and showed little interest in additional features like sprint or qualifying races (see Chart 3.6).

Chart 3.6 | Fan feedback on suggested event changes



SECTION 4

BRAND HEALTH

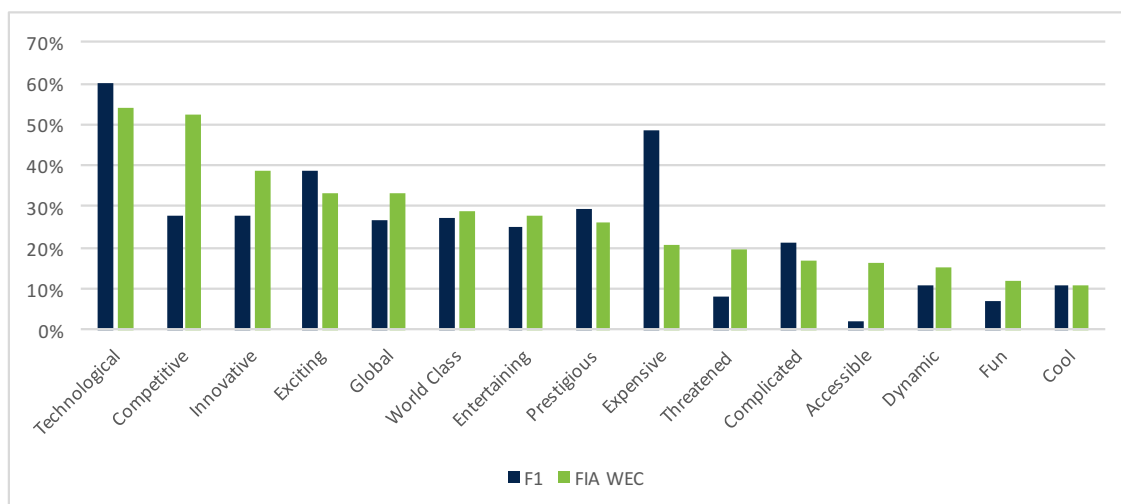
Headlines

- > You record very positive brand health scores for the WEC
- > Top 5 WEC attributes – Technological, Competitive, Innovative, Exciting and Global
- > You believe the WEC features the best cars, has the right balance of sport and business and is a proven testbed for road car development
- > You want the WEC to continue to deliver exciting, close racing in state of the art cars
- > You show some concern that the WEC is not as healthy as three years ago

One of the highlights of the 2017 Global WEC Survey is the very healthy opinion you have of the sport. We asked you to select the 5 most appropriate terms to describe the WEC from a list of 37 possible attributes. For comparison, we have included, the results drawn from the recent 2017 F1 Global Fan Study. The comparison clearly illustrates your current fan positivity around the Championship.

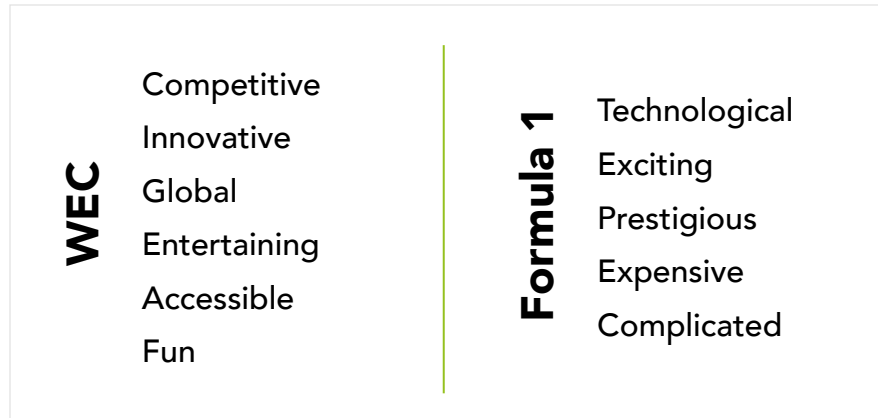
The WEC's top nine (9) brand attributes are all very positive with the only negative attribute in the Top 10 recorded as Threatened, undoubtedly driven by recent withdrawals from LMP1 by Audi & Porsche (see Chart 4.1).

Chart 4.1 | WEC and Formula 1 brand attributes (2017)



In comparison to Formula 1; you perceived WEC as more competitive, innovative, entertaining, accessible and fun (see Chart 4.2).

Chart 4.2 | WEC vs F1 brand health (2017)

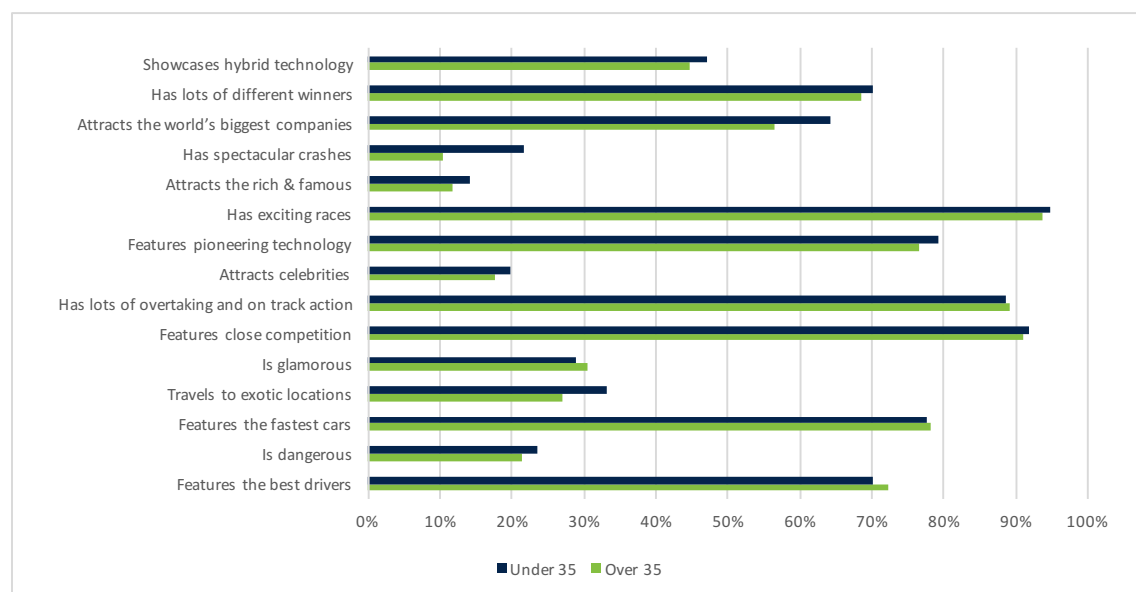


Overall you have a very positive outlook, with the majority of you believing it features the best sportscars (81.6%), introduces innovation to benefit road users (65.1%), is the pinnacle of motorsport (53.0%) and has the right balance of sport and entertainment (57.9%).

In addition, we asked you to rank the relative importance of various WEC attributes. The Top 5 attributes all recorded over 75% importance rating and provide a clear indication of your priorities for future success.

Exciting racing	(94.2%)	
Close competition	(91.3%)	
Overtaking & on track action	(88.9%)	
Features fastest cars	(77.9%)	
Features pioneering technology	(77.7%)	(see Chart 4.3)

Chart 4.3 | WEC health check

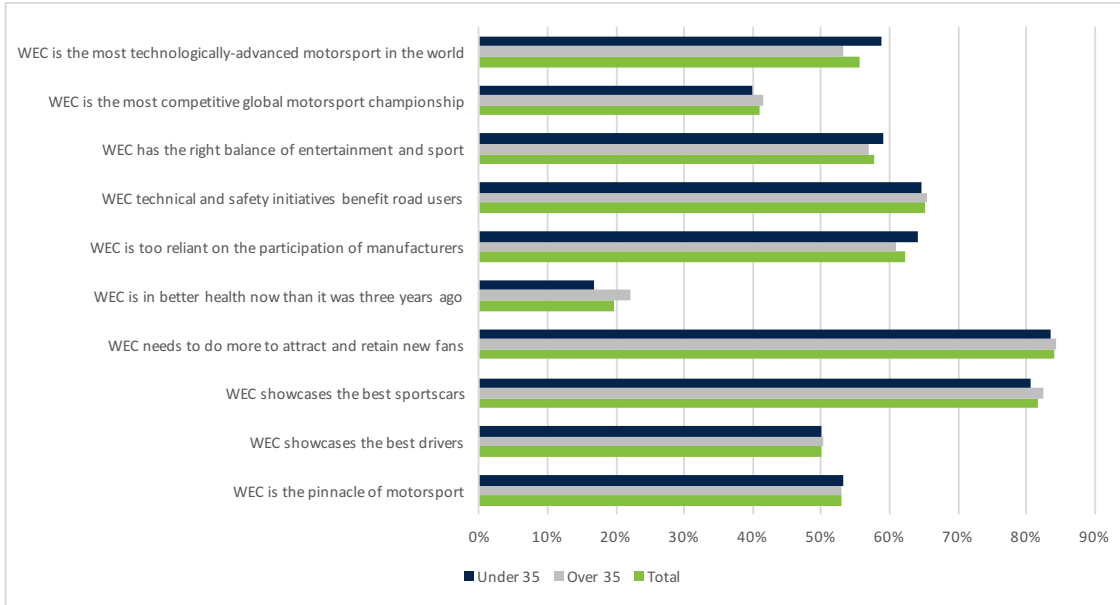


To help secure a healthy future, you urged WEC to be vigilant in a number of key areas including:

- > doing more to attract new fans (84.0%)
- > not become too reliant on major manufacturers (62.4%)

However, in response to recent announcements regarding LMP1 over 80% of you believe the sport is less healthy than it was 3 years ago (see Chart 4.4).

Chart 4.4 | Current WEC health rating





SECTION 5

THE COMPETITORS

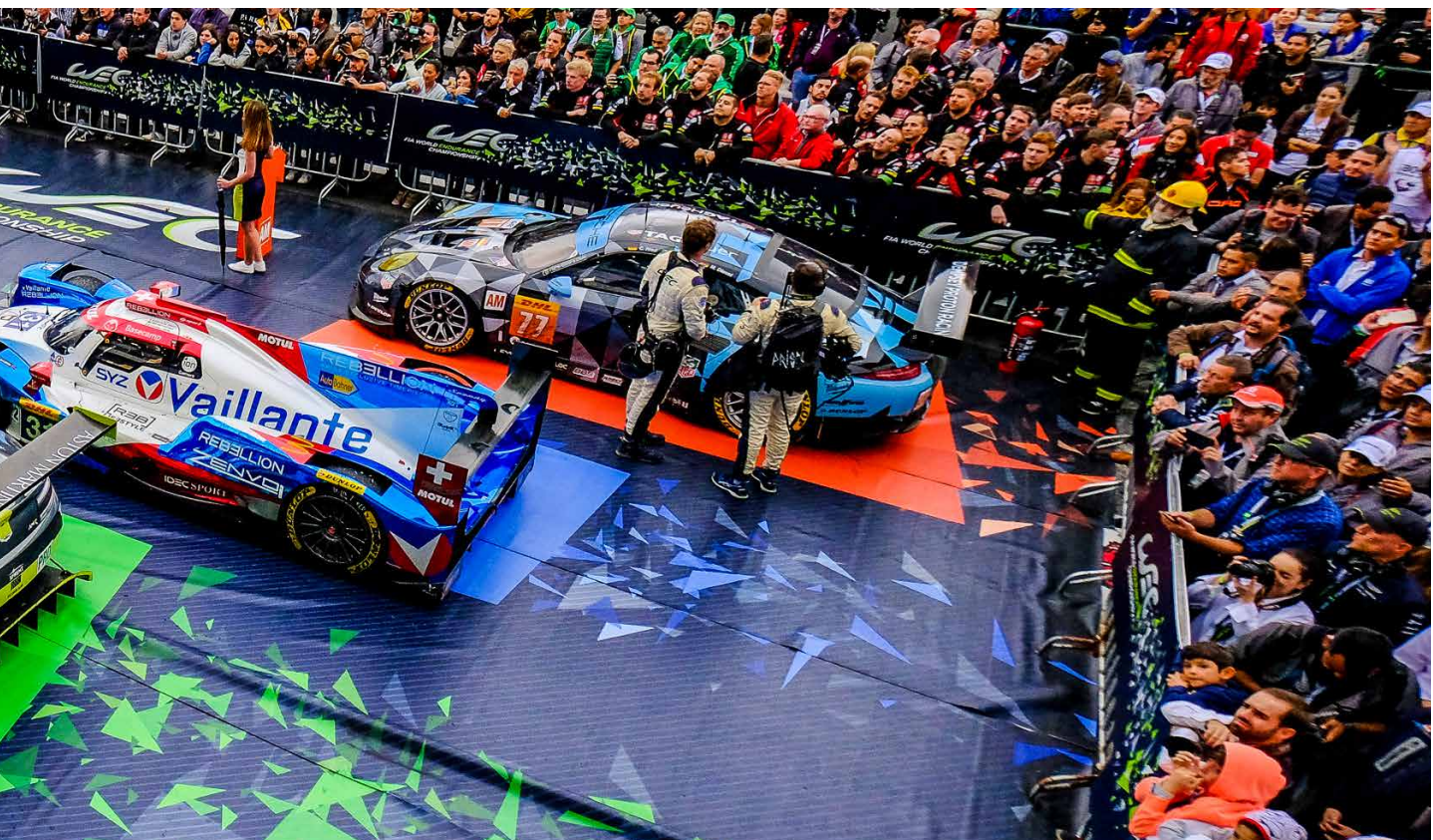
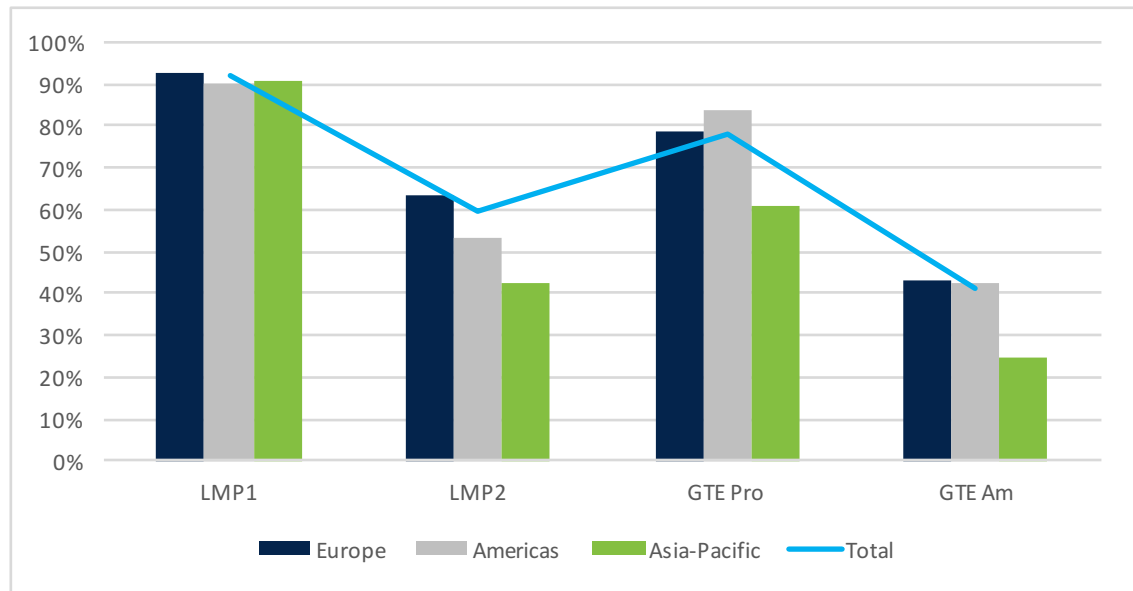
Headlines

- > Diversity is a key differentiator for WEC – races distances, categories and manufacturers
- > LMP1 is the single most followed WEC category, but nearly 80% of you follow both LMP & GT categories
- > You believe LMP1 should continue as the premier class even without manufacturer entries
- > You believe WEC provides a valuable R&D platform for manufacturers
- > 75% of you don't support a particular individual team or driver
- > Ferrari, Porsche, McLaren, Audi and Aston Martin as your Top 5 most appealing WEC manufacturers in the future



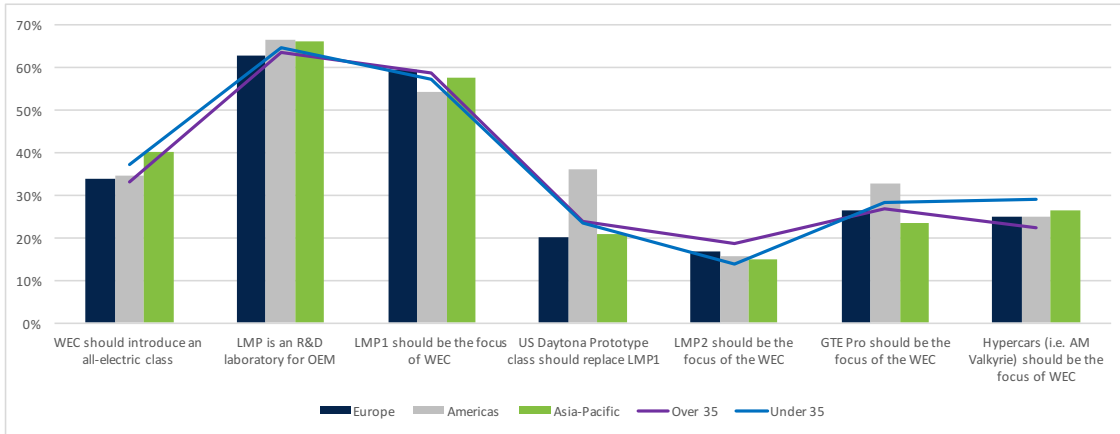
You actively follow all categories, and while LMP1 is your most followed category, nearly 80% of you follow both GT and LMP categories. These findings are consistent across all gender, age groups and geographic regions (see Chart 5.1).

Chart 5.1 | Ranking of fan opinion by WEC category



We asked you to provide your opinion on potential future sporting changes, and the results confirmed that you are satisfied with the current structure and regulation of the championship. You do not want to adopt different rules and regulations from alternative series, nor do you believe the introduction of an electric or hypercar categories would benefit the WEC (see Chart 5.2).

Chart 5.2 | Appeal of future sporting changes

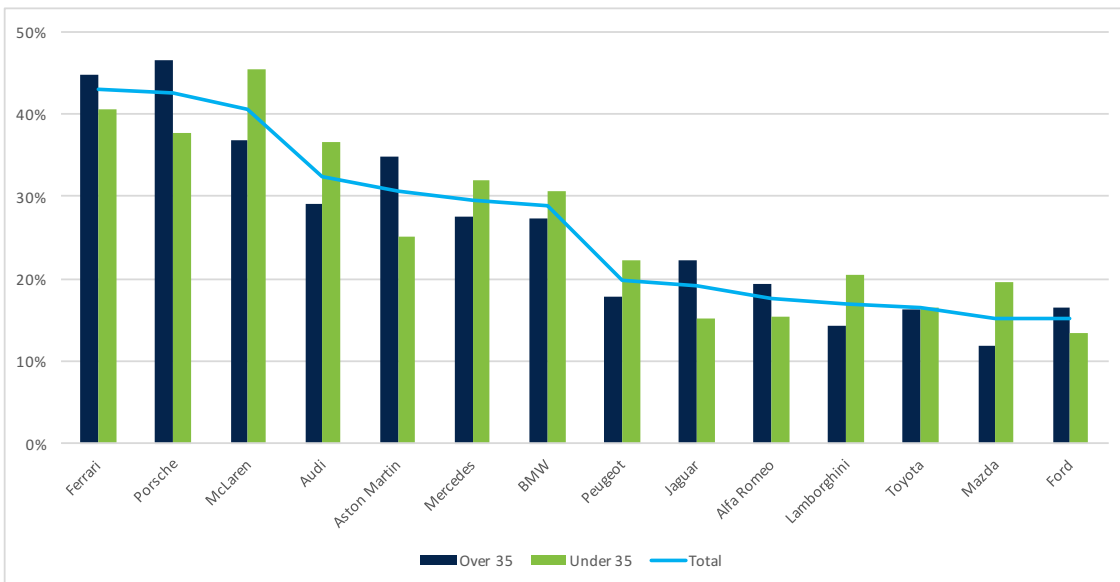


Support of the WEC is markedly non-tribal with the vast majority (74.6%) of you impartial to individual team or driver loyalties. Just 17.9% of you are loyal to a particular manufacturer, with 4.1% of you loyal to a team and 3.5% loyal to a driver regardless who they drive for.

WEC racing is a sport enjoyed by all, regardless of category, team or competitor. Evidencing this non-partisan support is Porsche, as the most popular current manufacturer, with just 33.3% support.

We also asked you to identify your Top 5 most preferred manufacturers to compete in WEC in the future. Ferrari proved the most popular, followed very closely by Porsche and McLaren. However, within the emerging younger WEC audience (under 35), McLaren were your #1 most desired future competitor (see Chart 5.3).

Chart 5.3 | Ranking of manufacturers to compete in future of WEC



SECTION 6

SPONSORSHIP

Headlines

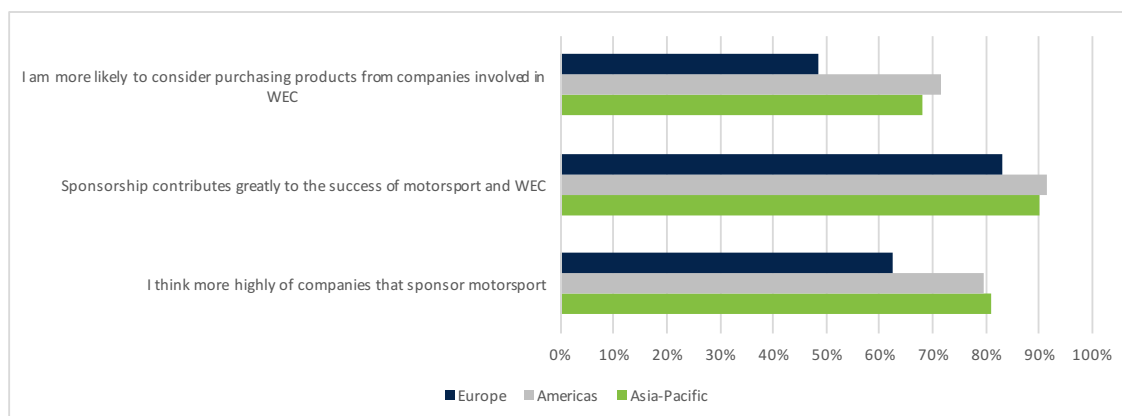
- > You recognise and respect the positive contribution made by sponsors
- > You are more likely to consider sponsors' products above others
- > WEC competitor manufacturers and official series partners enjoy the highest levels of spontaneous brand recall

As a global fanbase you recognise and value the positive contribution made by sponsors to the health of motorsport. Supporting evidence is shown by you being more likely to consider sponsors' products above non-sponsors.

Car manufacturers competing in the WEC enjoy the highest levels of brand recall, with Official WEC series partners also scoring highly with you.

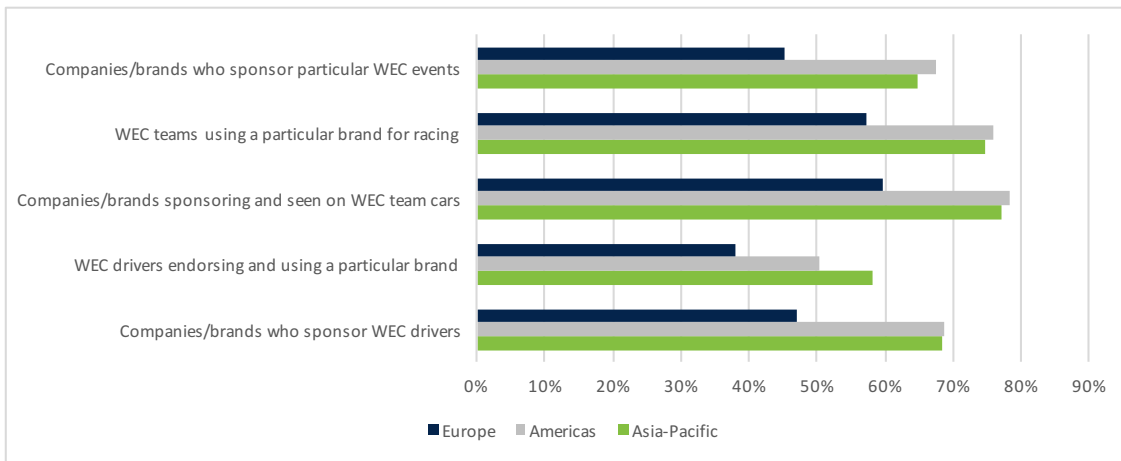
Over 85% of you believe sponsors contribute to the success of the championship, you also think more highly of sponsors and are more likely to purchase their products. Fans in Europe are less positive than those in Americas and Asia-Pacific (see Chart 6.1).

Chart 6.1 | Fans attitude to WEC sponsorship



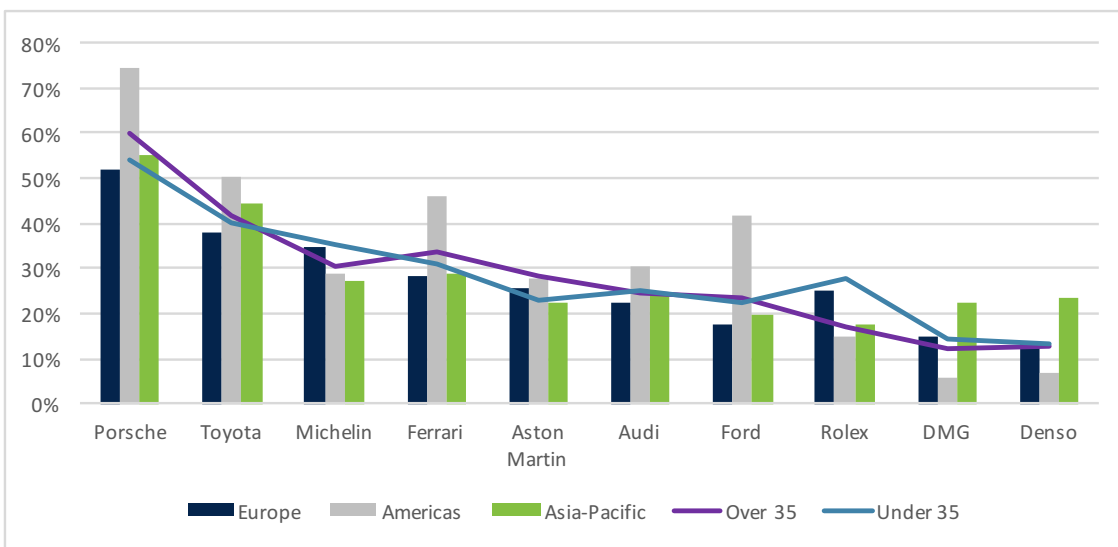
WEC sponsorship has a positive effect on your purchasing behaviour with fans in Americas and Asia-Pacific most positively disposed to sponsors. On-car branding has the largest single positive impact on your purchasing behaviour (see Chart 6.2).

Chart 6.2 | Influence of brand positioning on purchasing behaviour



When we asked you to name your top 5 WEC-related brands, your response was dominated by competing WEC manufacturers and official WEC partners. The Top 10 'most recalled' brands comprised of 6 WEC competitors, 2 leading LMP1 team sponsors and 2 Official WEC Series partners (see Chart 6.3).

Chart 6.3 | Spontaneous brand recall by region and age



2017 WEC GLOBAL FAN SURVEY

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With Thanks



Official Partners



Official Manufacturers

PORSCHE

TOYOTA HYBRID



Survey Partners



FIA WORLD ENDURANCE CHAMPIONSHIP
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