



UNIVERSITY

WRC FAN ENGAGEMENT SURVEY

INTERIM FINDINGS

MARCH 2024





A MESSAGE FROM THE PRESIDENT

The FIA World Rally Championship (WRC) is something that holds a special appeal for me. As such, I am delighted to present to you in the report that follows, interim findings from a comprehensive survey of WRC fans undertaken in recent months.

It is hugely satisfying to see that their love for the Championship remains undiminished. It is the variety of settings in which the WRC is staged, its authenticity in the eyes of its so many drivers and fans, and a sense of nostalgia that it provokes, that ensures its attraction lives on.

The opinions of our fans and stakeholders are extremely important to me and my colleagues at the FIA. I will ensure that collectively we study the findings from this survey as it provides an evidence base upon which we can examine ways to further support the WRC, which remains central to our plans moving forward.

I commend this report to you.

A handwritten signature in blue ink, which appears to be 'محمد بن سليمان' (Mohammed Ben Sulayem).

Mohammed Ben Sulayem
President, FIA

INTRODUCTION

One of the most comprehensive surveys of fan engagement with the FIA World Rally Championship (WRC) has been published.

Drawing upon a sample of greater than 11,000 respondents, of whom more than **8 out of 10 confirmed that they were regular 'viewers' of the WRC** and almost half have attended a WRC event, the appeal of rallying remains undiminished.

Respondents stated that it is the variety offered by the WRC – road surfaces, settings, and climatic conditions – that they found appealing, as well as the 'authenticity' of rallying, through using standard road networks, for example, rather than a man-made circuit. Indeed, when asked to comment on the future direction of the WRC, it was this variety of testing conditions for teams and drivers that fans wanted to see retained.

On the same theme, survey respondents indicated they would wish to see a greater number of endurance rallies, where the competitors covered a minimum of 350 km, being added to the roster. By contrast, there was little appetite for restrictions in terms of the horsepower of competing cars, with only 19% of respondents stating they would back the introduction of a 300 BHP limit, with even less support for a nominal speed limit of 180 km per hour, as only 16% of respondents saw any merit in this proposal.

Respondents do recognise the importance of competing cars using sustainable fuels (59%) and, on a similar theme, increasing the accessibility of teams to the WRC was a recurring point, with two in every three respondents 'strongly agreeing' with the move towards less expensive overheads/ cars as a means of facilitating this outcome.

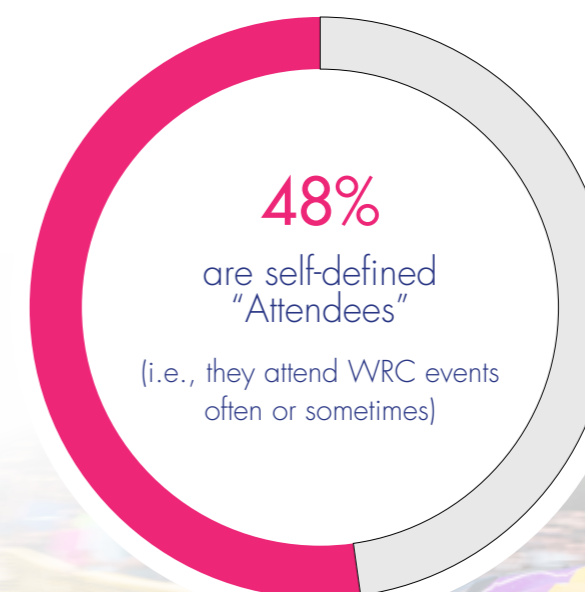
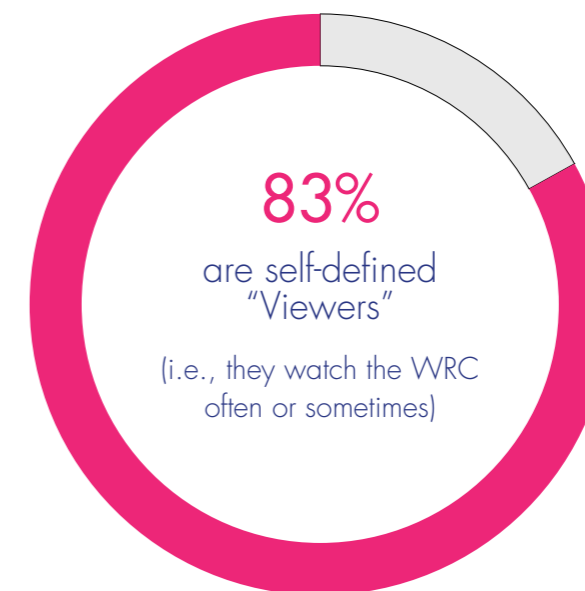
Overall, for WRC fans, the series invokes a sense of nostalgia, with many citing the 'golden era' for the sport being around the turn of the millennium. It is the hallmarks of this period in the championship, combined with the rich variety of settings, and a sense of access to and affiliation with drivers and teams, that respondents identify as being the essence of their affiliation with WRC.

The findings from this survey, which was undertaken with support from **Yonder** and also included dedicated focus group engagement with fans, will serve to inform future decision-making on the part of the FIA and offer a rich insight into the WRC for all stakeholders.

David Hassan
Professor David Hassan

TOPLINE SURVEY FINDINGS

OUT OF 11,198 TOTAL RESPONDENTS:



BELOW, RESPONDENTS WERE ASKED TO STATE THE EXTENT TO WHICH THEY AGREED WITH THE FOLLOWING STATEMENTS ON THE WRC:

ATTRIBUTE

NET AGREE

Unique because it takes place over a variety of road surfaces and in different geographic locations and climatic conditions	98%
Unique because it takes place on every-day roads, instead of more standard artificial circuits	97%
Different from conventional circuit-based motorsport due to the role that nature and the elements play in the outcome of the rallies	95%
Unique because driver skills are as important as the performance of the car to the success of the competitor	94%
Different from conventional circuit-based motorsport due to the unpredictability factor of the events	93%
The WRC should be easily accessible to the public	93%
Unique and exciting because the outcome is all about the teamwork between drivers, co-drivers, and technicians	92%
Unique because amateur competitors can participate and compete on the same course as professional drivers	86%
The cars used in rallying should feel more 'real' and affordable to the audience	76%
Unique because rally events do not all run to the same format	74%
Unique because events happen in countries where other conventional circuit-based motorsport events may not take place	73%

SIMILARLY BELOW, RESPONDENTS WERE ASKED TO STATE THE EXTENT TO WHICH THEY AGREED WITH THE FOLLOWING STATEMENTS ON THE WRC

ATTRIBUTE

NET AGREE

The WRC should continue to host events across the year to ensure a variety of snow, gravel, and asphalt across the globe	98%
All cars should use standardized on-board cameras to enhance TV coverage	87%
I would like to see some 'Endurance' rallies per season where stage distance is over 350 kilometres	80%
I would like to see more freedom of format for event organisers	76%
Technical regulations should be used to ensure equality for larger base model cars	72%
There should be a cap to the sale price of cars to not exceed €300,000 per car	65%
Any B Segment (i.e., supermini cars) / C Segment (i.e., small family cars) / SUV vehicles should be eligible for competing in rallying	58%
All cars should use sustainable fuel by 2025	49%
The total length of the rally should be between 250 and 350 kilometres	46%
In the future there should be technical regulations that will allow electric and hydrogen powered cars to compete on the WRC on equal terms as other cars	34%

WRC STAKEHOLDER INSIGHTS 2024

TECHNOLOGY IN LEADING CARS

- Overall 59% think it's important for cars to be using sustainable fuels.
- 23% think it's important for cars to use hybrid technology
- 9% think it's important for cars to use fully electric power units.

LESS ADVANCED AND EXPENSIVE CARS, BUT MORE ACCESSIBILITY TO PODIUM POSITION:

- Overall, 89% are favourable towards the proposition that less advanced/expensive cars could increase the number of manufacturers and private teams capable of achieving a podium position.
- With 67% being very favourable, and 22% being somewhat favourable.

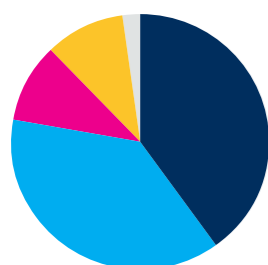
INCREASING THE NUMBER OF CARS

- Overall, 95% of respondents to this survey are in favour of the WRC increasing the number of Priority 1 Drivers from 9.
- Only 2% are not in favour.
- 3% don't know.

MANUFACTURERS;

- Overall, 97% think that there are not enough manufacturers and would like to see more.

RANKING OF WRC CARS ERAS



- Group B -1982 to 1986: 40% ranked this as their favourite era
- World Rally Car -1997 to 2021: 38%
- Group A -1982 onwards: 10%
- Rally 1 Car -2022 to current: 10%
- Group 4 -1973 to 1983: 3%

INTERIM QUALITATIVE FINDINGS FROM THE FOCUS GROUPS

At the time of writing, half the focus groups had been completed – a mix of fan typology (viewers/attendees) and geographic locations (Australia, New Zealand, Canada, USA, UK, Kenya, France, Poland, Mexico).

The makeup of these groups was of extremely engaged WRC fans. They all watched the events frequently. If they haven't attended an event recently, this is because it has not been organised in close geographic proximity to them (e.g., Canada or the USA).

All were very informed and knowledgeable about the WRC, and many of them (especially the older participants), talked confidently about the WRC in the 1980s and 1990s.

Overall, fans agreed that the WRC is a unique form of motorsport, and were very passionate towards it for several reasons:

- The pure thrill and emotional factor of watching a rally, driven by the beautiful sceneries, coupled with the look, feel and sound of the cars.
- The endurance element of the races
- The cars feel more accessible to fans (e.g., more like your "everyday car" than an F1 car)
- The variety of the events and stages. Fans love the different landscapes. Fans love seeing races on snow, in forests, in the desert and on everyday roads.
- The role of nature and the elements.
- The unpredictability factor (i.e., cars breaking down just before reaching the finishing line).
- The teamwork involved between mechanics, drivers, and co-drivers.
- The drivers feel more approachable than those in other forms of motorsports. Fans all have stories of engaging personally with drivers during a race, and they love this element of the sport.
- The fact that amateur competitors can compete in the same rally as the professional ones.

CONCLUSION

When talking about the current state of the WRC, as well as its future, there was an overall feeling (among both younger and older fans) of nostalgia towards the WRC from the late 1990s and early 2000s. All agreed that this era was the “golden age” of rally.

Fans compared this era to the WRC of today and thought that the events were more exciting two decades ago for several reasons: more manufacturers; more drivers capable of reaching podium position (and thus more competition); less technologically advanced cars that felt more approachable / accessible to fans; the rallies feeling more exciting overall; the drivers’ personalities being more captivating. This is not to say that fans do not enjoy the WRC of today, but when asked about the best era of the WRC most agreed that this was about twenty years ago and urge the FIA to look back and try to follow its success from that period.

As a result, most would like to see more manufacturers, teams and drivers involved in the WRC today. This is backed solidly by the survey findings outlined in this report.

When talking about the current state of Rally 1 cars, there was a strong feeling that these feel too advanced and particularly, too expensive. This was felt to be a barrier to entry to car manufacturers. Fans thought that many manufacturers simply could not afford to invest in expensive rally cars, especially with the risk of these being damaged frequently throughout the course of the Championship. As such, fans are broadly in favour of capping the cost of cars as they think it will enable more manufacturers to take part—this is also backed by survey findings with 65% agreeing overall. They see this as a potential opportunity to increase engagement and reach of the WRC.

More manufacturers = more teams = more drivers = potentially more nationalities competing.

Some fans thought that if the number of drivers’ nationalities increases, this could have a knock-on effect on the appeal of the WRC, as it could reach a wider range of nations/ fans.

Finally, some spoke of Rally 2 events, and how these appear more like the WRC events from twenty years ago. Some, among the more engaged, actually felt it was a better product.