



Insight into NASCAR Fans

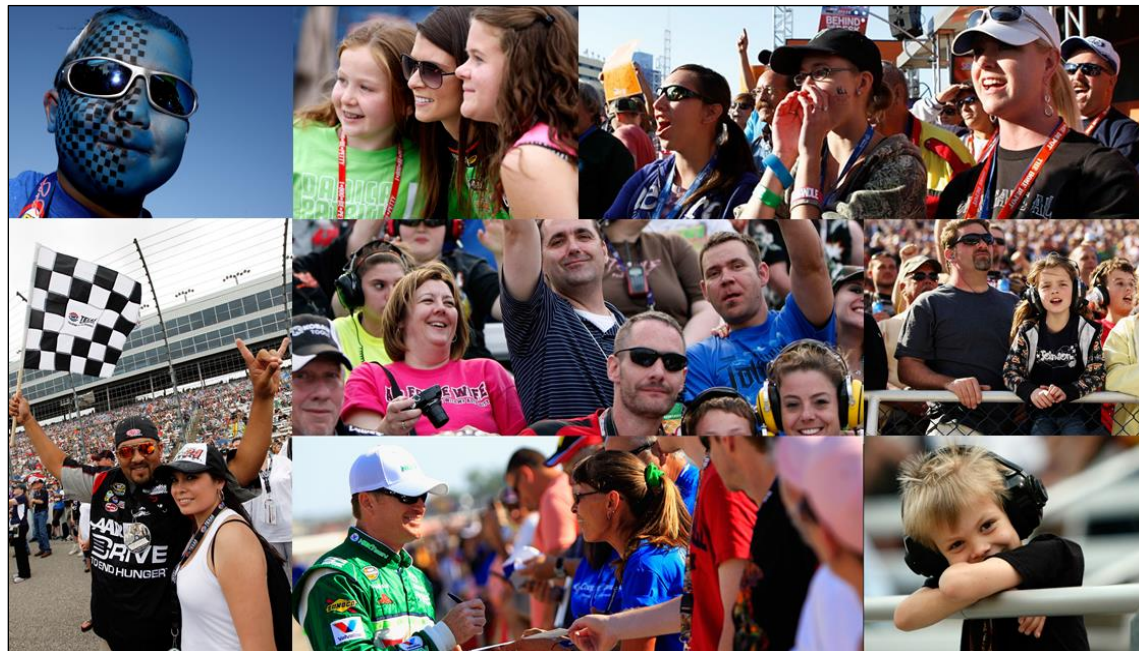
Prepared by NASCAR Market and Media Research



The Most Loyal, Active, and Engaged Fans



- **Audience of millions**
- **Heart and soul** of the sport, a cross-section of America
- **A lot like all of us:** neighbors, co-workers, hardworking, involved in the community
- **Emotional connection** to the sport, having favorite drivers, favorite auto manufacturers, etc.
- **Loyal to sponsors!**

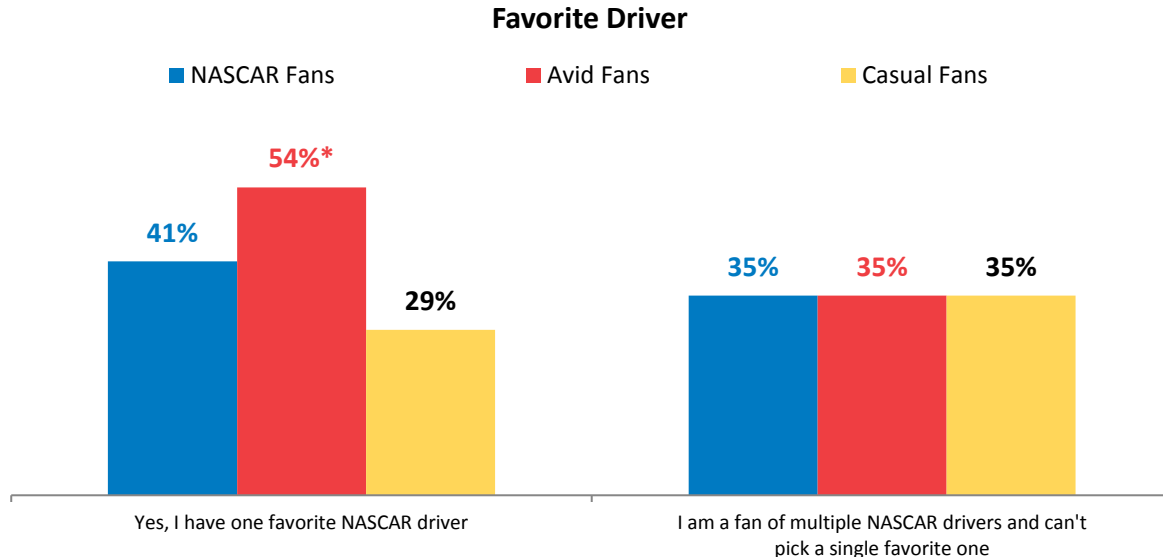


No other major sport in the U.S. delivers a higher quality of fan when it comes to supporting sponsors.

Drivers: Having a Favorite Impacts Consumption



NASCAR drivers are an important connection to the sport



Read: 41% of NASCAR fans have a single favorite driver.
Question: Do you have a favorite NASCAR driver?

Source: NASCAR Fan Engagement Tracker (commissioned by NASCAR and conducted by Toluna, 2015), n=2,500 NASCAR Fans
NASCAR fandom is determined by using a 7-point interest question: Using a scale of 1 to 7 where 1 is "not at all interested", 4 is "moderately interested", and 7 is "extremely interested", please rate how interested you are in NASCAR. NASCAR fans are 4-7, Avid NASCAR Fans are 6-7, Casual NASCAR Fans are 4-5.
*Indicates results are statistically significant at a 95% confidence level.

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Impact on Consumption

(Having a single favorite driver vs. no favorite)

+7 hours

more **NASCAR media**
consumed per week

2.5x

as likely to claim to
attend NASCAR Sprint Cup Series
races

+63%

more likely to have a
favorite auto manufacturer

NASCAR fans have a strong connection with cars



Consume More Auto-Related Content

+86%

more likely than
non-fans visit
auto-related websites



2.5x

As likely as non-fans to
read auto-related
magazines



+40%

more likely than
non-fans to **own** a
pick-up truck



+24%

more likely than
non-fans to **change** their
own oil

Positive Attitudes Toward Car Maintenance & Technology

% Who Agree

Index vs. non-fans

"I am interested in what goes on under the hood of a car"

62% / 135*

"I perform the routine maintenance on some or all of the cars in my household"

46% / 131*

"I keep up on the latest advances in automobile technology"

29% / 171*

"Friends and family always ask my advice on what car they should buy"

21% / 150*

Source: Experian Marketing Services (Simmons National Consumer Survey, Fall Full Year 2014) n=27,446. Based on NASCAR fans compared to non-fans.

Fandom is determined by using the following question: "How interested are you in [NASCAR]?" ["very", "somewhat", "a little bit", or "not at all"].

NASCAR fans are those respondents who indicate they are at least a little bit interested in NASCAR.

Claimed auto websites visited in the last 30 days, including: autotrader.com, cars.com, edmunds.com and kbb.com. Auto magazines based off of claimed net readers.*Indicates results are statistically significant at a 95% confidence level.

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NASCAR Fan Base Demographics



62%
Male



38%
Female



18-44 Years Old



23%

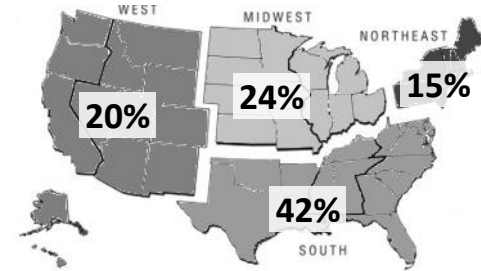
Multicultural



3 OUT OF 5

Employed
(full or part-time)

Geographic Distribution



\$71,000

Average
Household Income



1 OUT OF 3

Households
with Children



1 OUT OF 2

Some College
or Beyond



2 OUT OF 3

Homeowners

Top 5 NASCAR Markets

(by number of people interested in the sport)

1. Los Angeles
2. New York
3. Chicago
4. Dallas
5. Atlanta

Source: Nielsen Scarborough (USA+ Release 1, 2015). Field dates: February 2014-March 2015. Sample size is approximately 47,000 NASCAR fans.

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NASCAR fans are those respondents who indicate they are at least a little bit interested in NASCAR.

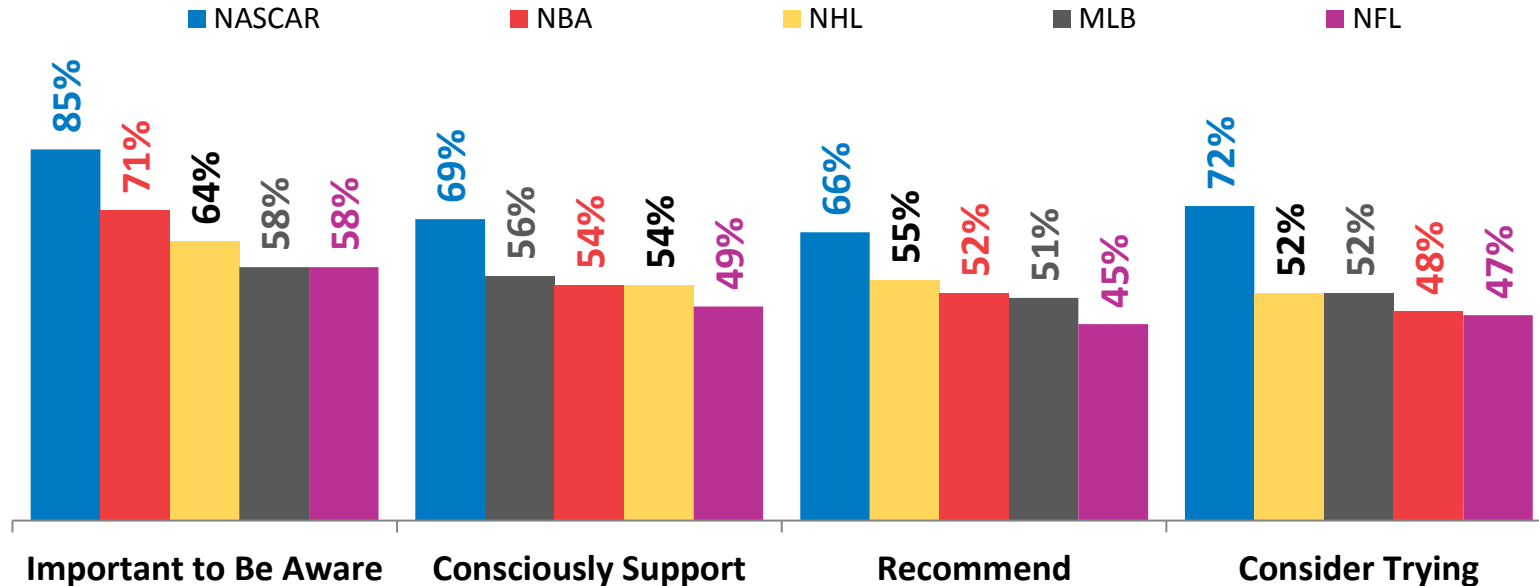
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Independent Research: NASCAR is #1 in Fan Loyalty to Sponsors



Proportion of Each Sport's Avid Fans who Are More Likely to Support the Sport's Official Sponsors in the Following Ways



Q: Is it important to you to be aware of which companies are official sponsors of [INSERT SPORT]? [YES / NO]

Q: Are you more or less likely to [INSERT LOYALTY METRIC] a product / service if that product / service is an official sponsor of [INSERT SPORT]?

Source: Turnkey Sports & Entertainment, results published in SBJ, n=400 for each sport's entire study

Note: Data reflects latest results for each sports property as of December 2015

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STREET & SMITH'S
**SportsBusiness
JOURNAL**



According to independent research conducted by Repucom:

- NASCAR ranks #1 among major sports in sponsor consideration
3 out of 4 NASCAR fans would consider a sponsor's brand
- NASCAR ranks #1 among major sports in sponsor loyalty
7 out of 10 NASCAR fans said they are loyal to a sponsor's brand when the brand supports their sport
 - Higher than NFL, NHL, MLB, and NBA fans
 - Nearly 20% higher than a typical sports fan

Source: Repucom SponsorLink (January 2014 – February 2015). n=~14,000

Questions: When a company sponsors an event or sport that you follow, how likely would you be to consider that company's brand, product(s) or service(s) for the first time? Generally, how loyal do you feel towards a company that sponsors an event or sport you follow?

Note: The questions were asked of everyone in the study and then segmented by major sports league fan bases.

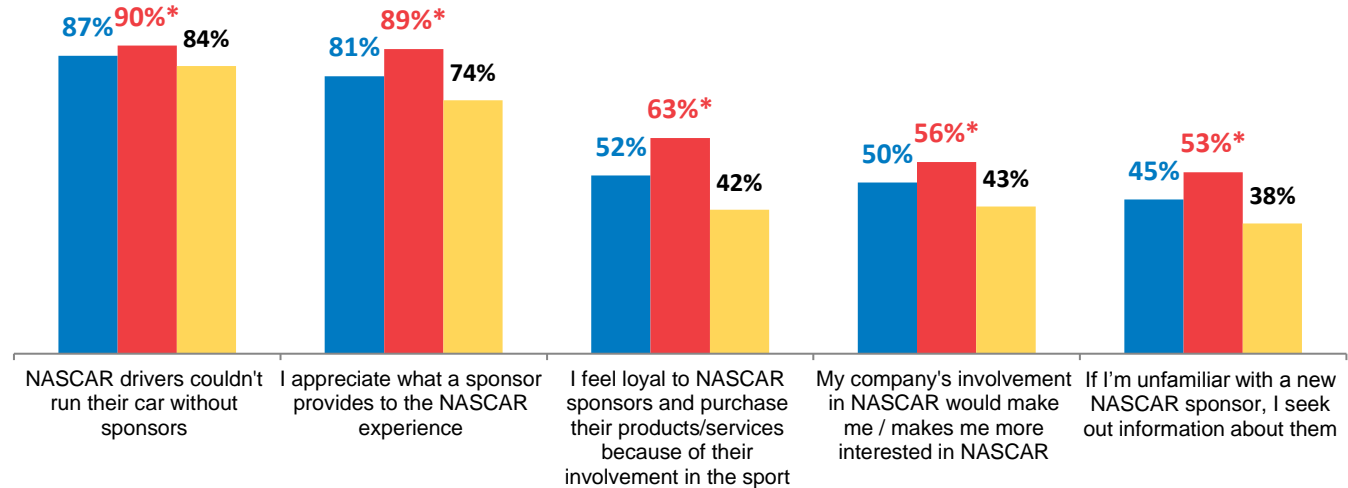
Fans Appreciate Sponsors in NASCAR



Proportion who Agree with Each Statement

(Top 5 Box % Agree, 6, 7, 8, 9, or 10 on 10-pt. scale, sorted by NASCAR fans)

■ NASCAR Fan ■ Avid NASCAR Fan ■ Casual NASCAR Fan



Read: 87% of NASCAR fans agree NASCAR drivers couldn't run their car without sponsors.

Source: NASCAR Fan Engagement Tracker (commissioned by NASCAR and conducted by Toluna, 2015), n=2,500 NASCAR Fans

Note: The asterisk (*) indicates statistical significance between avid & casual NASCAR fans at the 95% confidence level.

NASCAR fandom is determined by using a 7-point interest question: Using a scale of 1 to 7 where 1 is "not at all interested", 4 is "moderately interested", and 7 is "extremely interested", please rate how interested you are in NASCAR. NASCAR fans are 4-7, Avid NASCAR Fans are 6-7, Casual NASCAR Fans are 4-5.

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Avid NASCAR Fans Support NASCAR Sponsors



Attitudes Toward NASCAR Sponsors	% Who Agree <small>Top 5 Box, 6, 7, 8, 9, or 10 on 10 pt.-scale</small>
"Brands I like are sponsors in NASCAR"	82%
"I talk positively about brands that are sponsors in NASCAR"	68%
"I support NASCAR sponsors more than sponsors of other sports"	61%
"I'm supporting NASCAR sponsors more than ever before"	57%

Source: NASCAR Fan Engagement Tracker (commissioned by NASCAR and conducted by Toluna, 2015), n=1,171 Avid NASCAR Fans
NASCAR fandom is determined by using a 7-point interest question: Using a scale of 1 to 7 where 1 is "not at all interested", 4 is "moderately interested", and 7 is "extremely interested", please rate how interested you are in NASCAR. Avid NASCAR Fans are 6-7.

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Professional and Financially Responsible



NASCAR fans are business leaders and purchase decision makers



+20%

more likely to be
business leaders
(business executives
and / or small
business owners)

+60%

more likely to **work**
for **Fortune 500**
companies

FORTUNE
500

18%



**Are business purchase
decision makers**

Nearly **+40%** more likely than non-fans

24%

Consume business-related media



+36%

more likely
to **read the business**
section of the
newspaper

+25%

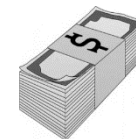
more likely to **research**
financial information
on the internet

+22%

more likely to
watch CNBC



36%



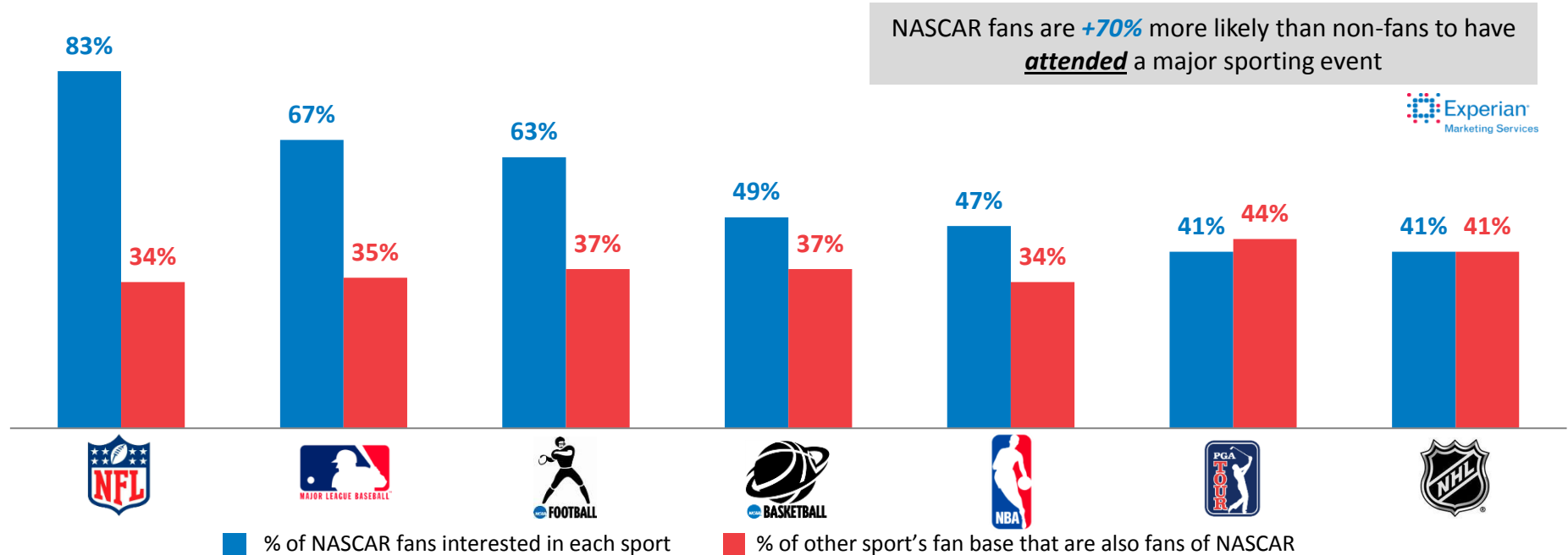
Of business purchase decision
makers are involved in **decisions**
of **\$100,000 or more** a year

Source: Experian Marketing Services (Simmons National Consumer Survey, Fall Full Year 2014). Based on NASCAR fans compared to non-fans. Fandom is determined by using the following question: "How interested are you in [NASCAR]?" ["very", "somewhat", "a little bit", or "not at all"]. NASCAR fans are those respondents who indicate they are at least a little bit interested in NASCAR.

Business-related media is defined as: reading the Wall Street Journal, Bloomberg Businessweek, Forbes, Fortune, Kiplinger's Personal Finance, Money, and / or watching CNBC.

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NASCAR fans are passionate about various sports



Sources: Nielsen Scarborough Research (USA+ Release 1, 2015), n=203,988 and Experian Marketing Services (Simmons National Consumer Survey, Fall Full Year 2014), n=27,446
Fandom is determined through the use of the following question: "How interested are you in [sport]?" ["very", "somewhat", "a little bit", or "not at all" interested].
Fans are those respondents who are a little bit, somewhat, or very interested in [sport].

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NASCAR fans love all things sports



61% Enjoy playing sports

+17% more likely than non-fans

30% Play sports every chance they get

+20% more likely than non-fans

+40%

more likely than non-fans to own sports equipment



+44%

more likely than non-fans to watch, listen or attend live sporting events

TWICE

as likely as non-fans to read sports-related magazines

+80% more likely than non-fans to play fantasy sports

Source: Experian Marketing Services (Simmons National Consumer Survey, Fall Full Year 2014) n=27,446. Based on NASCAR fans compared to non-fans. Fandom is determined by using the following question: "How interested are you in [NASCAR]?" ["very", "somewhat", "a little bit", or "not at all"].

NASCAR fans are those respondents who indicate they are at least a little bit interested in NASCAR.

Sport participation claimed within the last 12 months, except for "play sports every chance they get." Sports defined as:

auto racing, baseball, basketball, bowling, boxing, football, golf, hockey, racquetball, skiing, snowboarding, soccer, softball, swimming, tennis, and volleyball.

Play in fantasy sports leagues claimed within the last 12 months. *Indicates results are statistically significant at a 95% confidence level.

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Favorite Sports to Play

Percent that participate / Index vs. non-fans



Swimming

35% / 109*



Bowling

24% / 120*



Golf

18% / 164*



Basketball

17% / 113*



Baseball

15% / 150*

Outdoor Enthusiasts




NASCAR fans are outdoor enthusiasts



54% Enjoy outdoor activities
Nearly +40% more likely than non-fans

2.5x
as likely as non-fans to
read fishing, hunting &
outdoor recreation
magazines

+50%
more likely than non-fans to
own outdoor-related
equipment


+55%
more likely than
non-fans to
own a boat


+90%
more likely than
non-fans to
own an ATV


TWICE
as likely as non-fans to
own a motorcycle

Favorite Activities to Participate In

Percent that participate /
Index vs. non-fans



Fishing
27% / 180*



Camping
20% / 154*



Target Shooting
18% / 200*



Hunting
17% / 243*



Biking
17% / 131*

Source: Experian Marketing Services (Simmons National Consumer Survey, Fall Full Year 2014) n=27,446. Based on NASCAR fans compared to non-fans.

Fandom is determined by using the following question: "How interested are you in [NASCAR]?" ["very", "somewhat", "a little bit", or "not at all"].

NASCAR fans are those respondents who indicate they are at least a little bit interested in NASCAR.

Outdoor activities participated in the last 12 months, including: archery, backpacking/hiking, boating, biking, camping, canoeing/kayaking, fishing, horseback riding, hunting, motorcycling, mountain/rock climbing, skin diving / snorkeling and target shooting. *Indicates results are statistically significant at a 95% confidence level.

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Homeowners and DIY Home Improvement



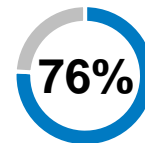
NASCAR fans are do-it-yourselfers



72%

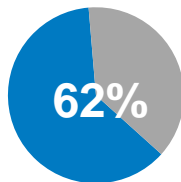
Are homeowners

Nearly +10% more likely than non-fans



Consider their households to be green[^]

Nearly +30% more likely than non-fans



Shop at home improvement stores

+38% more likely than non-fans

+17%

more likely than non-fans to
engage in home improvements



+25%

more likely than non-fans to
own workshop equipment



+17%

more likely than non-fans to
own lawn care equipment

Source: Experian Marketing Services (Simmons National Consumer Survey, Fall Full Year 2014) n=27,446 and Custom Growth Energy Tracker (commissioned by NASCAR and conducted by Toluna, 2015), n=2,000.

Based on NASCAR fans compared to non-fans.

Fandom is determined by using the following question: "How interested are you in [NASCAR]?" ["very", "somewhat", "a little bit", or "not at all"]. NASCAR fans are those respondents who indicate they are at least a little bit interested in NASCAR. *NASCAR fandom is determined by using a 7-point interest question: Using a scale of 1 to 7 where 1 is "not at all interested", 4 is "moderately interested", and 7 is "extremely interested", please rate how interested you are in NASCAR. NASCAR fans are respondents who choose 4, 5, 6, or 7.

Shop at home improvement stores claimed within the last 4 weeks.

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NASCAR fans shop multiple retail outlets and notice various promotions



Where They Shop (Percent / Index vs. non-fans)			
Supermarkets	Drug Stores	Convenience Stores	Mass Retailers
95% / 103*	72% / 101	70% / 132*	64% / 116*
Home Improvement Stores	Automotive Retail Stores	Department Stores	Sporting Goods Stores
62% / 138*	61% / 124*	43% / 116*	14% / 156*
Notice Promotions (Percent / Index vs. non-fans)			
Messages / Offers on Shelf	Free Standing Displays	Advertising on Floor	Overhead Aisle Markers
56% / 127*	68% / 119*	54% / 120*	68% / 119*

Source: Experian Marketing Services (Simmons National Consumer Survey, Fall Full Year 2014) n=27,446. Based on NASCAR fans compared to non-fans.

Fandom is determined by using the following question: "How interested are you in [NASCAR]?" ["very", "somewhat", "a little bit", or "not at all"].

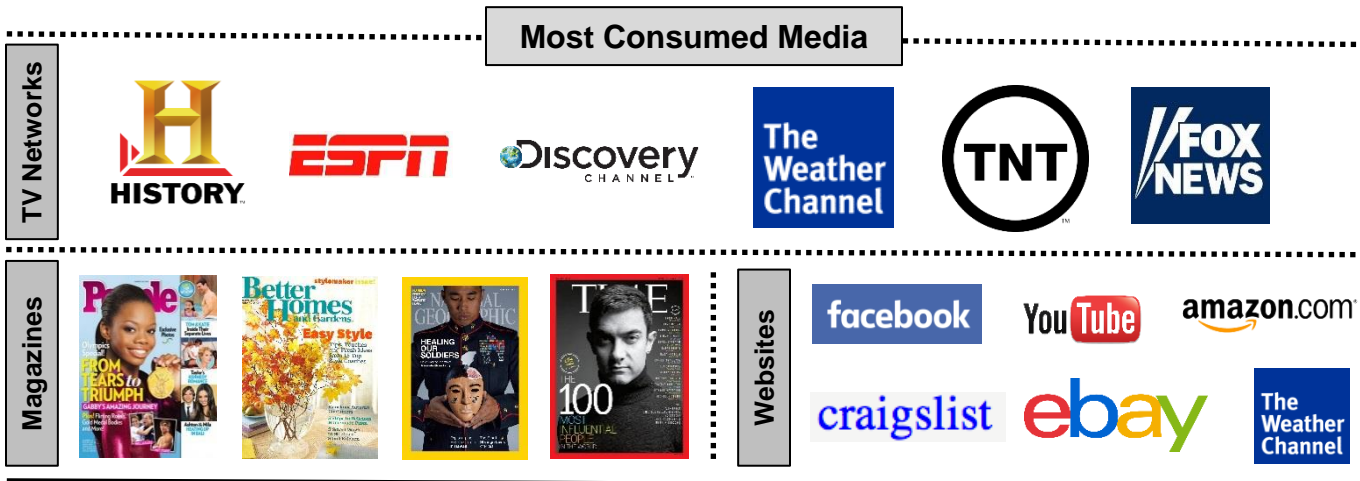
NASCAR fans are those respondents who indicate they are at least a little bit interested in NASCAR.

'Where They Shop' claimed within the last 4 weeks, except automotive retail stores within the last 12 months. *Indicates results are statistically significant at a 95% confidence level.

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NASCAR fans enjoy a wide range of activities



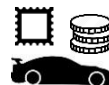
+12%

More likely than non-fans to own / play video games



60%

enjoy going to the movies



+27%

More likely than non-fans to collect

Source: Experian Marketing Services (Simmons National Consumer Survey, Fall Full Year 2014) n=27,446. Based on NASCAR fans compared to non-fans.

Fandom is determined by using the following question: "How interested are you in [NASCAR]?" ["very", "somewhat", "a little bit", or "not at all"].

NASCAR fans are those respondents who indicate they are at least a little bit interested in NASCAR.

TV, magazines and websites based off of the percentage of visitors who claim to watch, read or visit. Claimed TV network viewership within the last week. Claimed magazine readership within the last 6 months. Claimed website visitation within last 30 days and excludes search engines. *Indicates results are statistically significant at a 95% confidence level.

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V9 (Updated 01/22/16)

Favorite Hobbies

Percent that participate / Index vs. non-fans



Listen to Music

69% / 100



Dining Out

58% / 97



Barbequing

56% / 137*



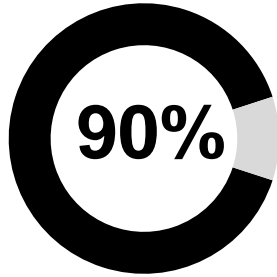
Reading Books

46% / 85*



Visit the Beach

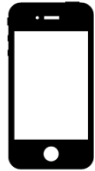
44% / 113*



of NASCAR fans are **digitally enabled**

(use the Internet, a smartphone or a tablet device)

just as likely as the U.S. population



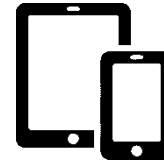
66%

of NASCAR fans
use smartphones



32%

of NASCAR fans
own tablets



58%

of NASCAR fans
use mobile apps

3 OUT OF 5

NASCAR fans
visit social media websites

just as likely as the U.S. population

1 OUT OF 7

NASCAR fans
visit **NASCAR.com**

similar to other sports leagues

Source: Experian Marketing Services (Simmons National Consumer Survey, Fall Full Year 2014) n=27,446. Based on claimed digital usage.

Random is determined by using the following question: "How interested are you in [NASCAR]?" ["very", "somewhat", "a little bit", or "not at all"].

NASCAR fans are those respondents who indicate they are at least a little bit interested in NASCAR.

Mobile apps on either a smartphone or tablet. Visit social media websites and visit NASCAR.com are claimed among NASCAR fans within the last 30 days.

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Fans Support the U.S. and Military



NASCAR fans are patriotic and strongly support U.S. military personnel



80%

Are registered to vote

+4% more likely than non-fans

+30%

More likely than non-fans to agree
"I buy **goods produced by my own**
country whenever I can"



+67%

More likely than non-fans to currently
serve or have served in the **armed**
forces / military reserves



Positive Attitudes about "NASCAR: An American Salute"

**% Avid NASCAR
Fans Who Agree**

"Patriotism is important to me"

95%

"I'm proud to see the NASCAR community support the military and their families"

94%

"Feels like the whole sport is united in supporting our troops"

91%



Source: Experian Marketing Services (Simmons National Consumer Survey, Fall Full Year 2014) n=27,446 and Official NASCAR Fan Council Weekly Post Race Survey Fielded July 6-7, 2015 n=2,106 avid NASCAR fans. Fandom is determined by using the following question: "How interested are you in [NASCAR]?" ["very", "somewhat", "a little bit", or "not at all"].

NASCAR fans are those respondents who indicate they are at least a little bit interested in NASCAR.

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Thank You

For more information, please contact Marketing Director
Eric McClure

