



Insight into NASCAR Fans

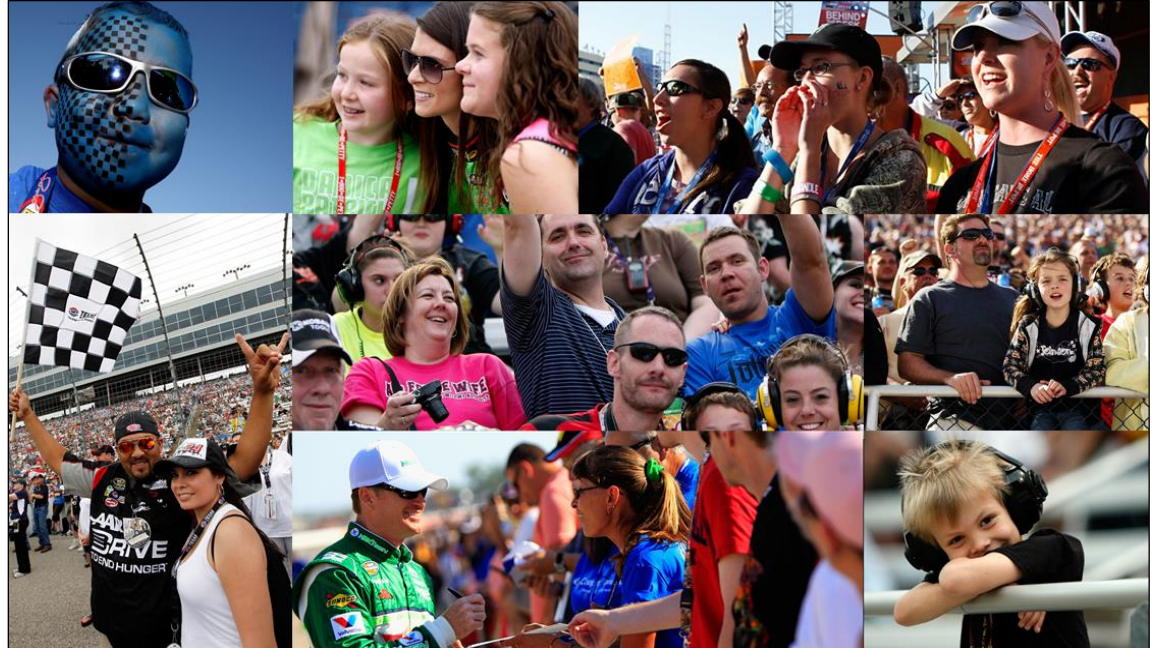
Prepared by NASCAR Market and Media Research



The Most Loyal, Active, and Engaged Fans

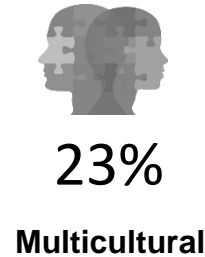
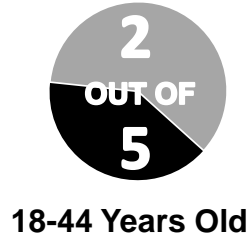
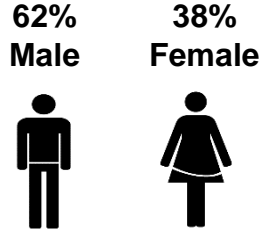


- **Audience of millions**
- **Heart and soul** of the sport, a cross-section of America
- **A lot like all of us:** neighbors, co-workers, hardworking, involved in the community
- **Emotional connection** to the sport, having favorite drivers, favorite auto manufacturers, etc.
- **Loyal to sponsors!**

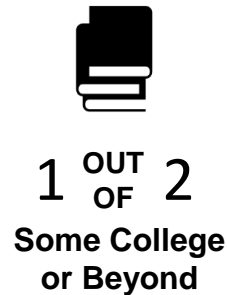
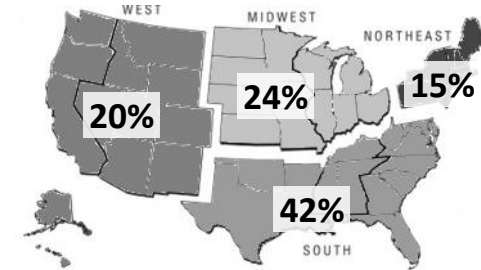


No other major sport in the U.S. delivers a higher quality of fan when it comes to supporting sponsors.

NASCAR Fan Base Demographics



Geographic Distribution



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. 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.

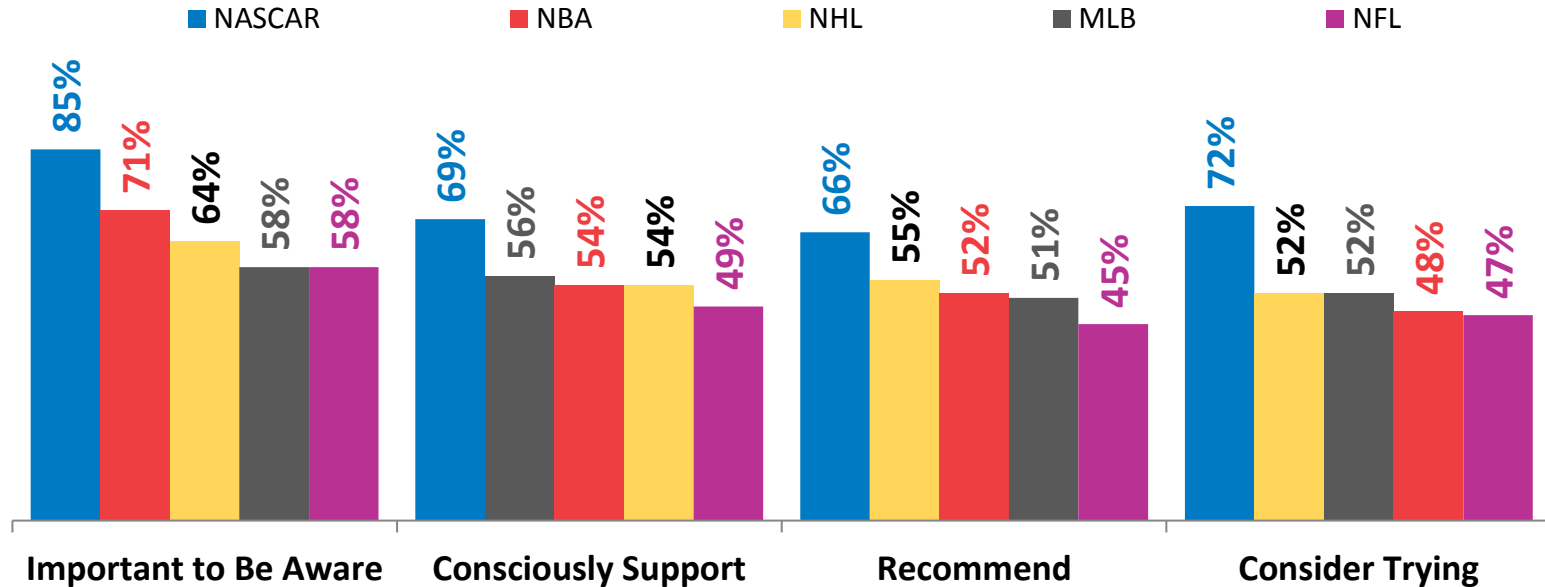
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V9 (Updated 01/22/16)

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

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?

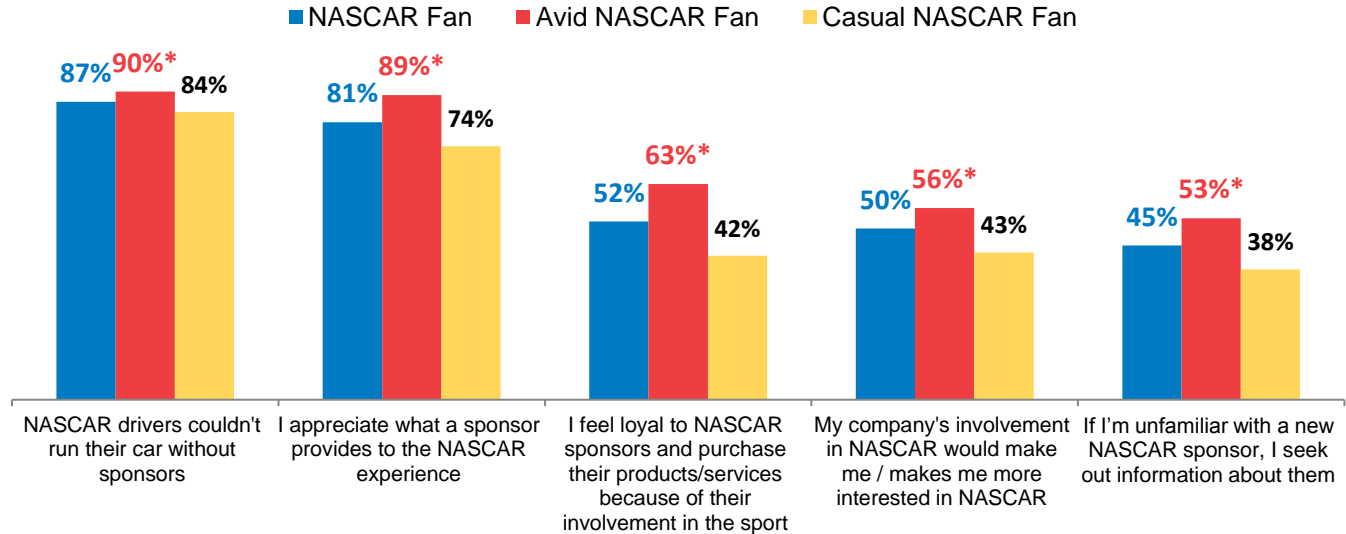
Note: The questions were asked of everyone in the study and then segmented by major sports league fan bases.

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)



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
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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



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%



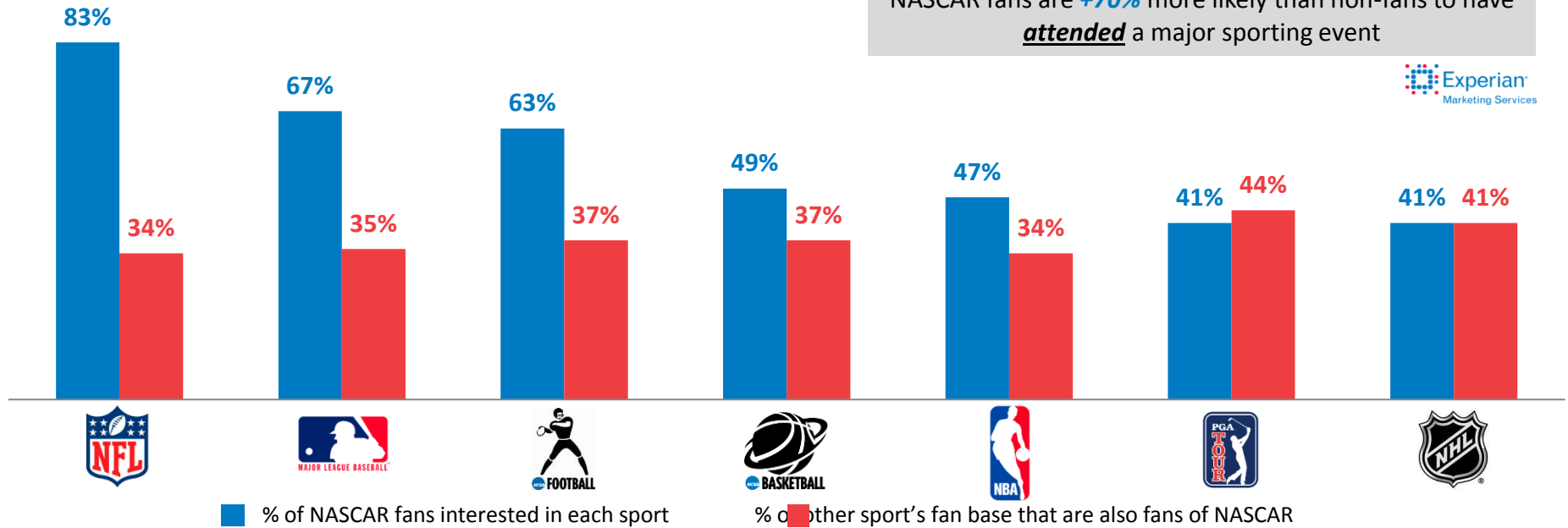
Of business purchase decision makers are involved in **decisions of \$100,000 or more** a year

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.

NASCAR fans are passionate about various sports

NASCAR fans are **+70%** more likely than non-fans to have **attended** a major sporting event



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].



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



+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

+40%

more likely than non-fans to own sports equipment

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*

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.


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



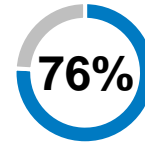
NASCAR fans are do-it-yourselfers



72%

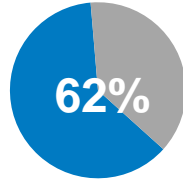
Are homeowners

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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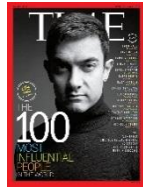
NASCAR fans enjoy a wide range of activities

Most Consumed Media

TV Networks



Magazines



Websites



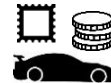
+12%

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



60%

enjoy going to the movies



+27%

More likely than non-fans to collect

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*

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

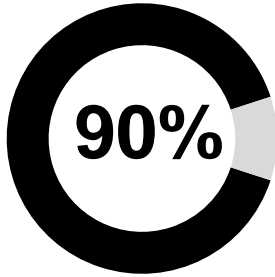
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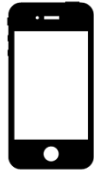
TV, magazines and websites based off of the percentage of visitors who claim to watch, read or visit. Claimed TV network viewership within the last week. Claimed magazine readership within the last 6 months. Claimed website visitation within last 30 days and excludes search engines. *Indicates results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

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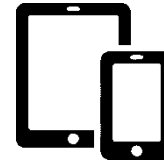
of NASCAR fans are **digitally enabled**
(use the Internet, a smartphone or a tablet device)
just as likely as the U.S. population



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.

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.

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.

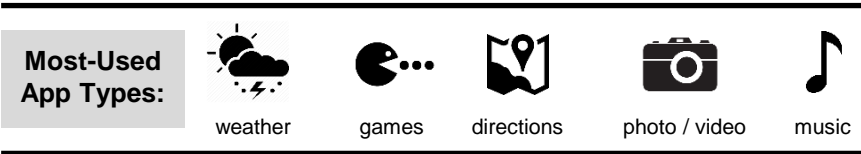
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NASCAR fans are just as likely to be mobile users



70% Use a mobile device (i.e. smartphone / tablet)
Just as likely as non-fans



Positive Attitudes Toward Technology	% Who Agree Index vs. non-fans
"I like to be connected to my friends and family wherever I am"	59% / 100
"I try to keep up with developments in technology"	42% / 105*
"I rely on my cell phone to keep up with news or sports"	27% / 108*
"I love to buy new gadgets and appliances"	27% / 108*

Top-5 Online Activities

Percent that use /
Index vs. non-fans



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

Sports apps ranked 10th as the most-used app type (16% / 145*). Top-5 online activities claimed within last 30 days and excludes e-mail (66% / 100) and search engines (36% / 109*); News activity includes both current events (31% / 107*) and sports news (26% / 263*), which is the only sports-related activity measured. *Indicates results are statistically significant at a 95% confidence level.

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%

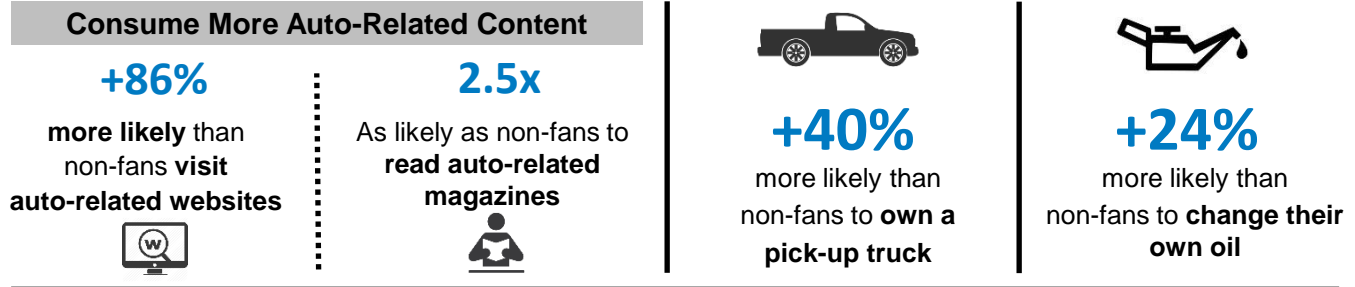
"Feels like the whole sport is united in supporting our troops"

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.

NASCAR fans have a strong connection with cars



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.

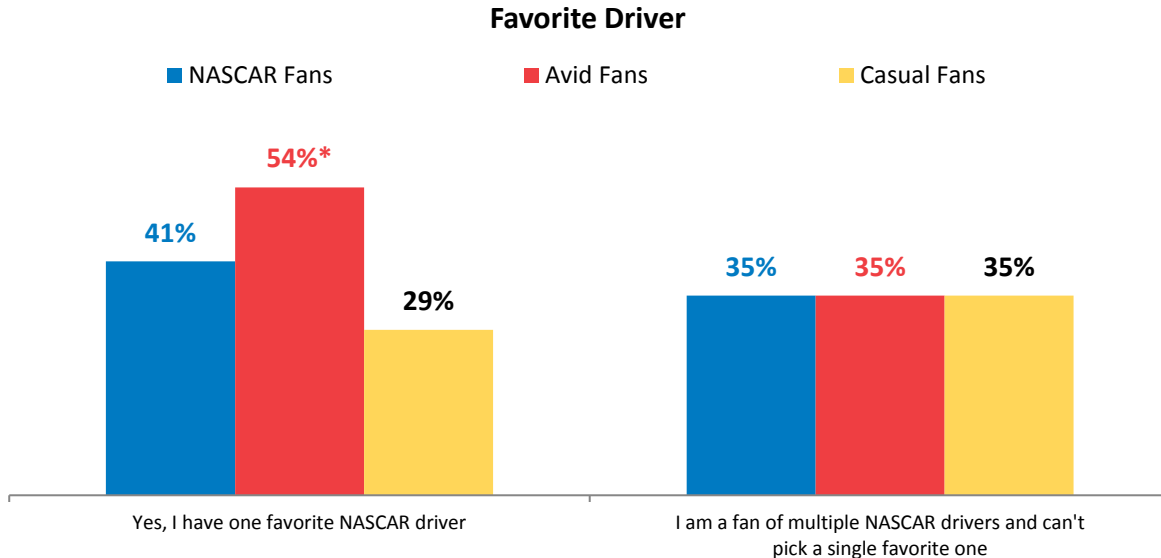
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Drivers: Having a Favorite Impacts Consumption



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?

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%

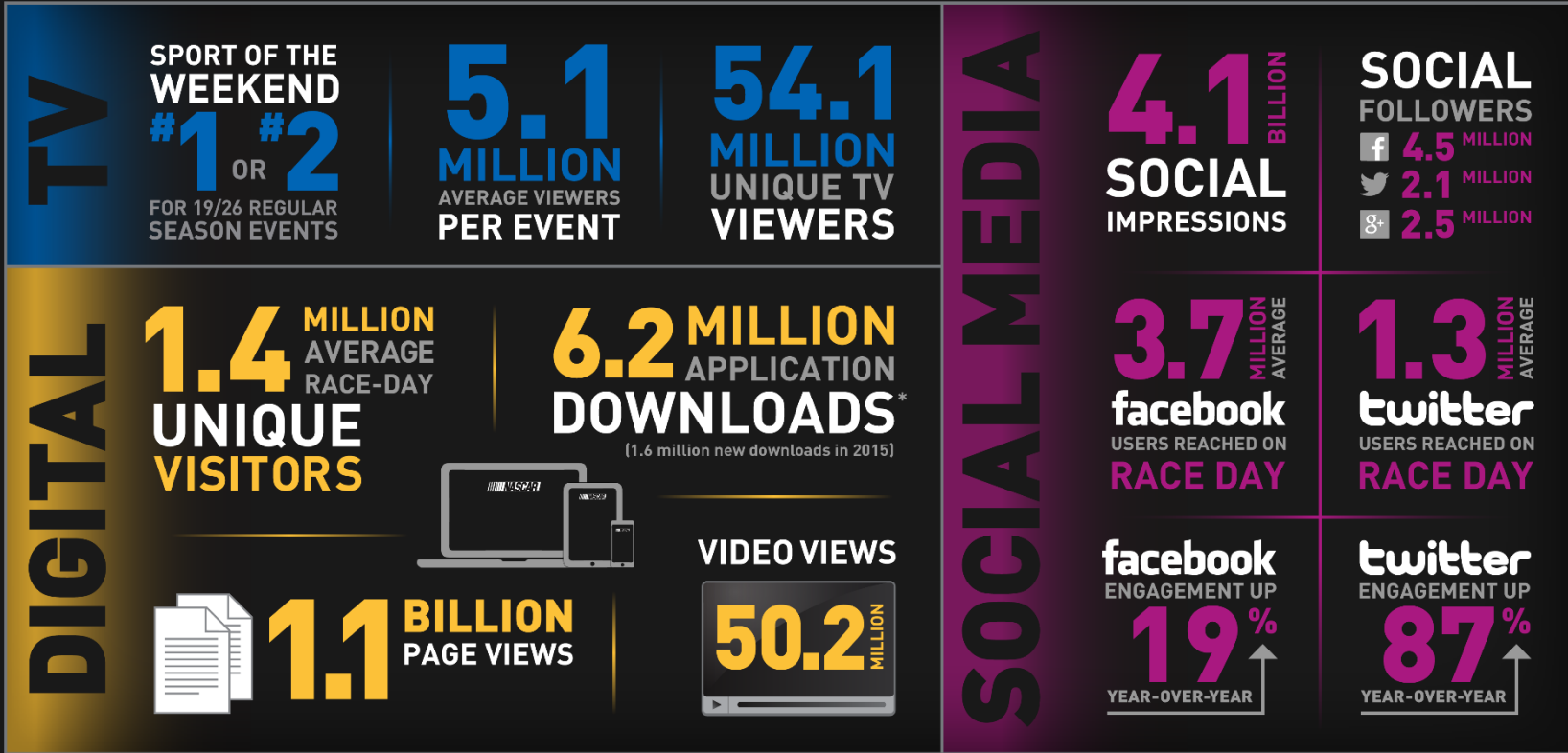
more likely to have a
favorite auto manufacturer

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.
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2015 Year-End Key Consumption Metrics

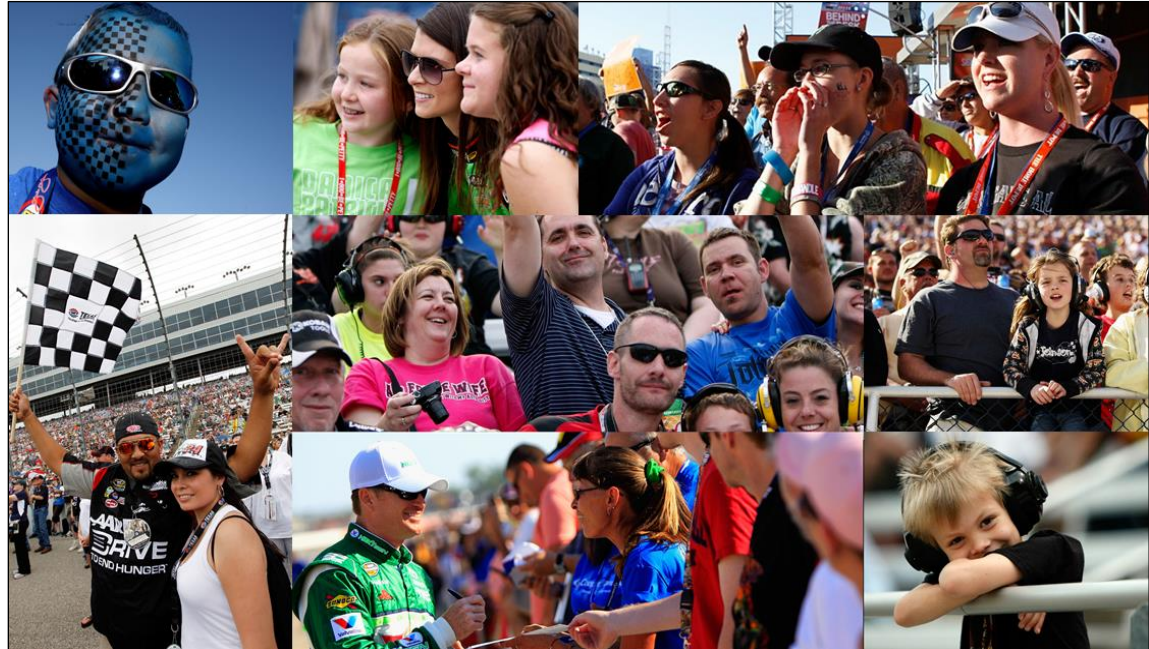


Race-day YTD averages exclude non-points events. Sources – TV: The Nielsen Company. Data based on Live + SD data stream. TV average viewership excludes Races 8 (Bristol), 11 (Kansas), 30 (Charlotte), and 35 (Phoenix) due to rain. #1 or #2 sport of weekend ranked on viewers. Digital: Adobe Omniture SiteCatalyst; Microsoft/Apple/Google. Digital metrics represent all platforms (NASCAR.com, NASCAR Mobile Web, NASCAR Mobile Apps). *App downloads since launch. Social: Facebook Insights; Twitter Analytics; Nielsen Social. Social impressions based on content served from the NASCAR Facebook page and the @NASCAR Twitter account combined year-to-date. Facebook reach based on content published on NASCAR Facebook page on race day. Twitter reach based on all conversation related to the race on the platform during the hours aired +/- 3 hours. Social engagement is defined by taking action on NASCAR's social content (e.g. sharing, likes, comments, favorite, retweets). All data through November 22, 2015.

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.



Thank You

For more information, please contact your account manager

