

The Power of NASCAR

A Compilation of Insights and Supporting Data from Multiple Sources

Prepared by **NASCAR Analytics & Insights**



Point of View: Insights Based on What the Data Tells Us

NASCAR delivers a massive audience – one of the largest among all major sports in the U.S. today. With millions of sponsor-loyal consumers engaged in the sport across television, digital, and social media platforms, it's no surprise that more than 125 companies in the Fortune 500 invest in NASCAR to build their brands.

Compared to other major sports, NASCAR is a leader in key media consumption metrics. NASCAR surpasses all other major sports in the U.S. when it comes to proportion of event viewed on television and digital consumption on the league website. More than half of all followers of NASCAR-owned social media accounts are 18-34.

Research by multiple independent sources show NASCAR is #1 in fan loyalty to sponsor brands – an important insight into the quality of the NASCAR audience and key competitive advantage of the sport.





MASSIVE REACH. HIGH ENGAGEMENT. MULTIPLE PLATFORMS.

2018 SEASON END



TELEVISION



48
MILLION
UNIQUE VIEWERS

DIGITAL




202
MILLION
VISITS


SOCIAL




2.6
BILLION
IMPRESSIONS


#1 OR 2
SPORT
OF THE
WEEKEND
(14 Times)


3.3
MILLION
VIEWERS TUNED
IN PER MINUTE
(MENCs)


98%
OF EVENT WATCHED
LIVE OR SAME DAY
(MENCs)


953
MILLION
PAGE
VIEWS


1.6
MILLION
AVERAGE RACE
DAY VISITS


2/3
OF ALL NASCAR
CONTENT CONSUMED
ONLINE IS VIA NASCAR
DIGITAL PLATFORMS


326
MILLION
VIDEO VIEWS


62
MILLION
TOTAL
ENGAGEMENTS


19
MILLION
AVG. RACE DAY
IMPRESSIONS
(MENCs)

What the Data Tells Us about the NASCAR Audience

National Reach

Largest fan base markets (LA, NY, Atlanta, Philadelphia, Chicago, Dallas, Tampa, Orlando, Wash DC, and Phoenix) each have approximately **1 million+** NASCAR fans

Sources: Nielsen Scarborough (USA+ Release 1 2018)

Highly Engaged

On average, NASCAR fans consume nearly **10 hours** per week of NASCAR content across all media channels

Source: NASCAR Fan Engagement Tracker, Toluna, 2015

Increasing Diversity

The proportion of NASCAR fans who are multicultural has **increased from 20% to 25%** since 2011

Source: Nielsen Scarborough (USA+ Release 1 2018)

Digital Technology Users

4/5 NASCAR fans use smartphones (**81%**) and/or use mobile apps (**78%**)

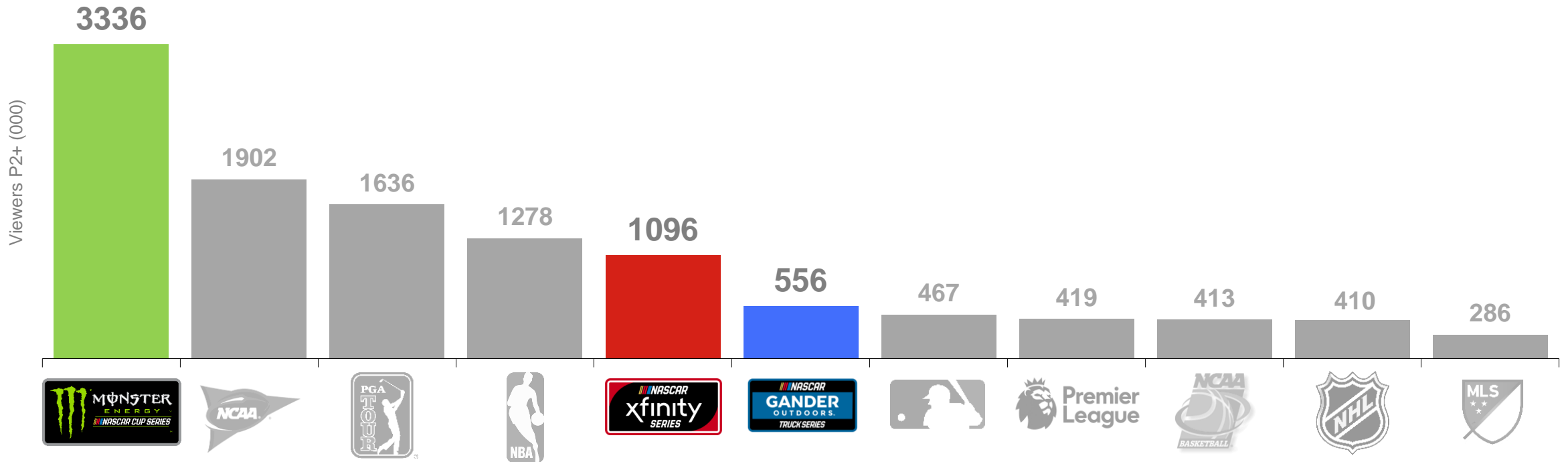
Source: Simmons Research (Nat'l Consumer Survey, Fall FY 2017)



NASCAR: An Efficient Audience to Reach

Major Sports Television Viewership (Most Recently Completed Regular Season)

When looking at viewers per minute, NASCAR's scale is often 2-5x other major sports on average.



Source: The Nielsen Company. Ranked based on the number of Viewers (P2+) tuned in. Results reflect the following completed regular seasons: MENCS (2018), NCAA Football (2017), PGA (2018), NBA (2017-18), NXS (2018), NGOTS (2018), MLB (2018), EPL (2017-18), NCAA Basketball (2017-18), NHL (2017-2018) and MLS (2018). MENCS results include the NASCAR Playoffs, PGA results include PGA FedEx Cup. Results exclude NFL (avg. of 15.7 million viewers P2+ tuned in per event in 2018). Based on Live + Same Day data stream.

NASCAR: An Engaged Television Audience

98%

NASCAR racing is watched within the same day with very little DVR time-shifting, a clear indication that NASCAR is a must-watch programming.

#1

In Percentage of Event Viewed among major sports (average of 48.5% of event viewed).

#1

In Most Average Minutes Watched among major sports (average of 94.5 minutes watched).

#1

In Co-Viewing Among Adults 18+ among major sports.



A Changing Audience Landscape

2nd Largest Sports Audience of Female Viewers (only behind NFL)



1.1
MILLION

**Female TV Audience
Per Event**

(34% of total NASCAR audience)



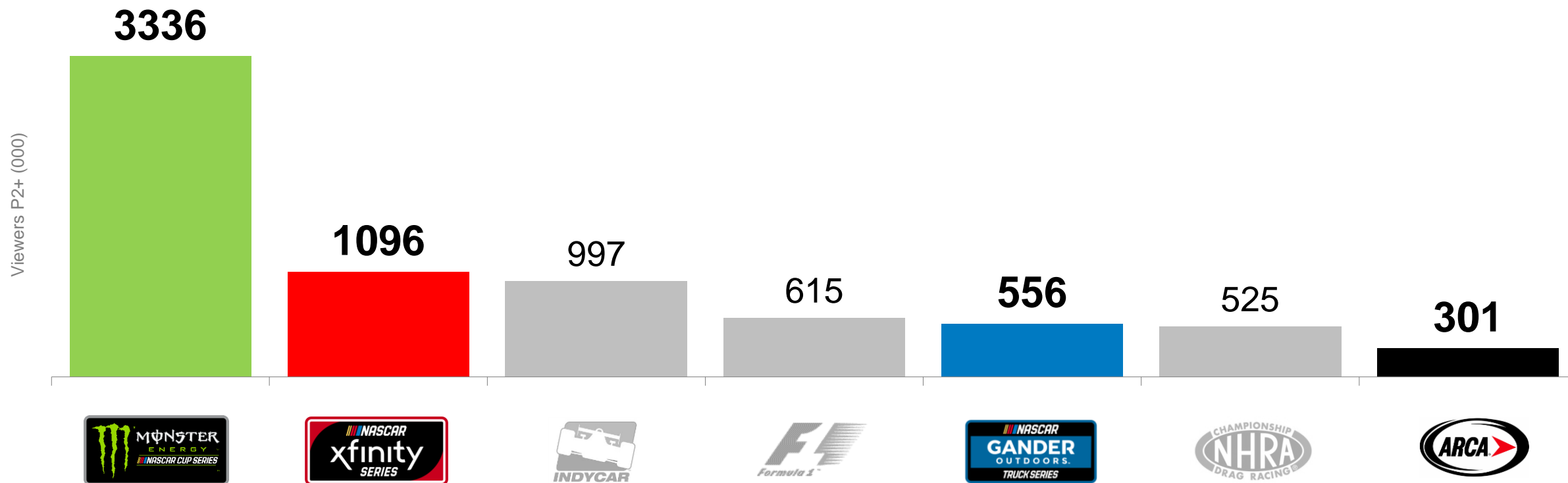
2nd Largest Sports Audience of Key 18-49 Demo (only behind NFL)



761
THOUSAND

**18-49 Year-old
TV Audience
Per Event**

2018 Motorsports Television Viewership



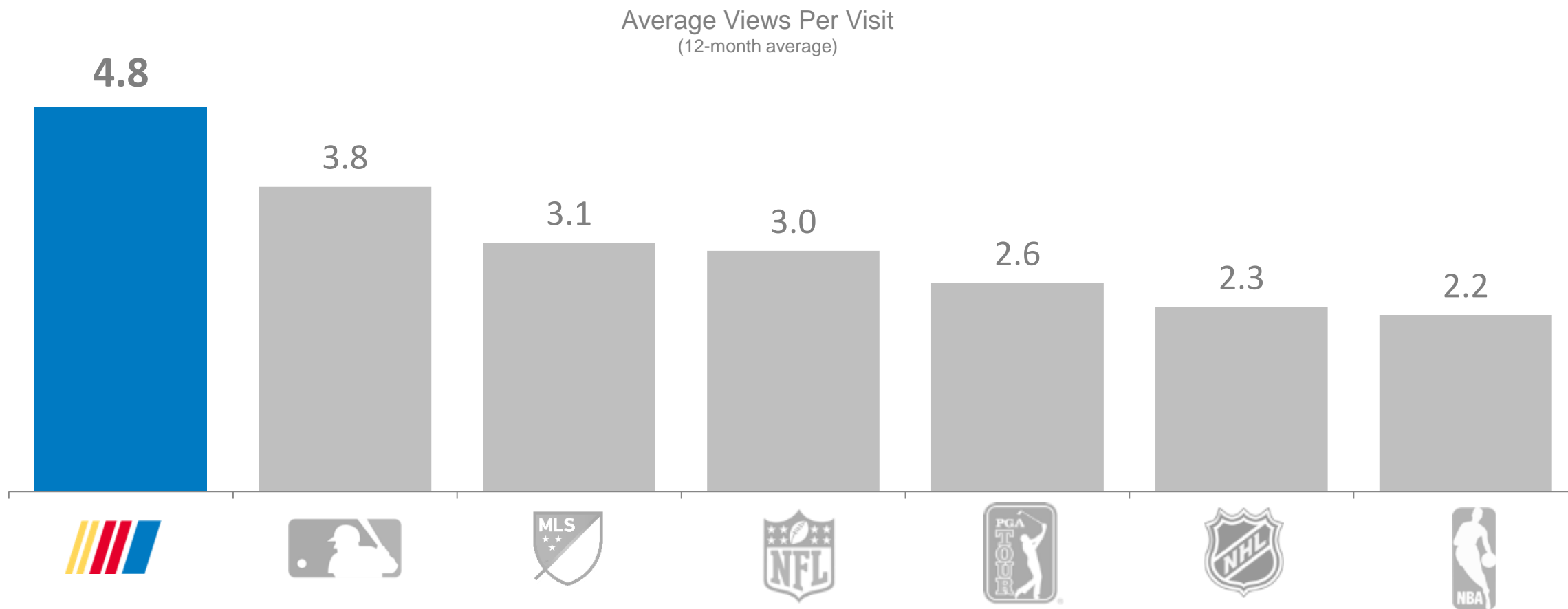
Source: The Nielsen Company, Nielsen National TV View. Based on Live + Same Day data stream.

Ranked based on the number of Viewers (P2+) tuned in. Results reflect the following completed regular seasons: MENCS (2018), NXS (2018), IndyCar (2018), F1 (2018), NCWTS (2018), NHRA (2018) and ARCA (201).

IndyCar includes the Indy 500 and F1 includes the Monaco Grand Prix.

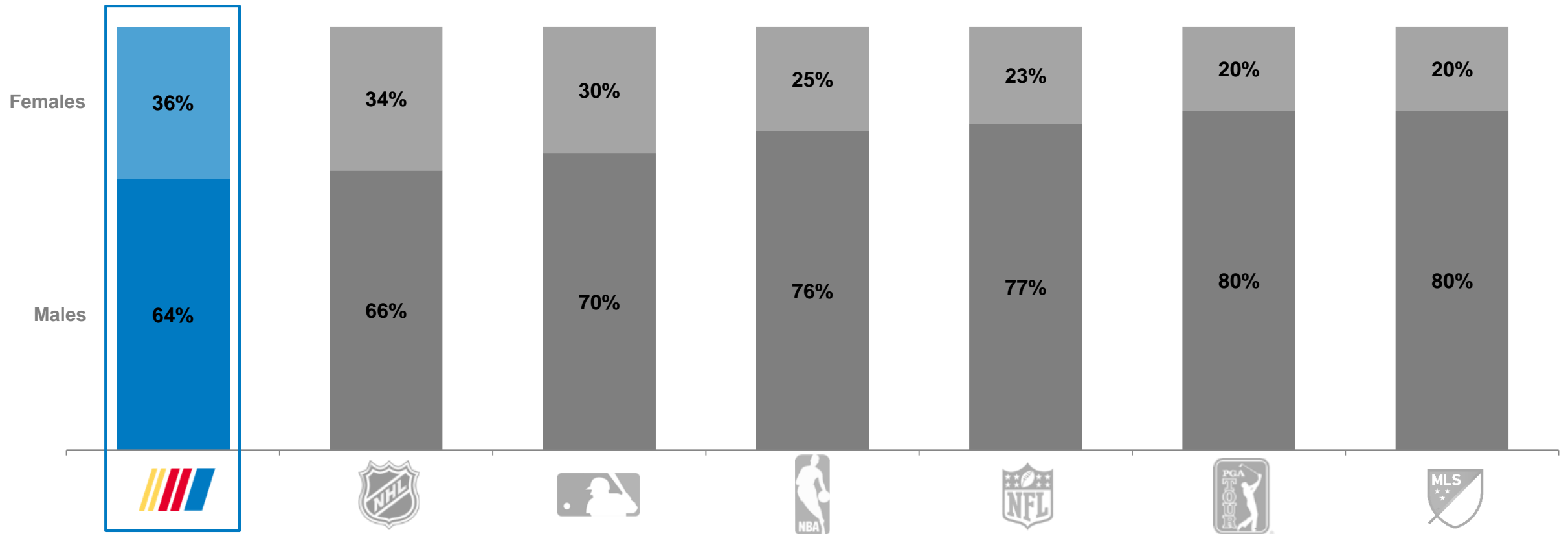
Digital Audience Consumption

NASCAR ranks as the #1 site for digital consumption among all major sports league websites, with visitors viewing 4.8 pages per visit (on average)



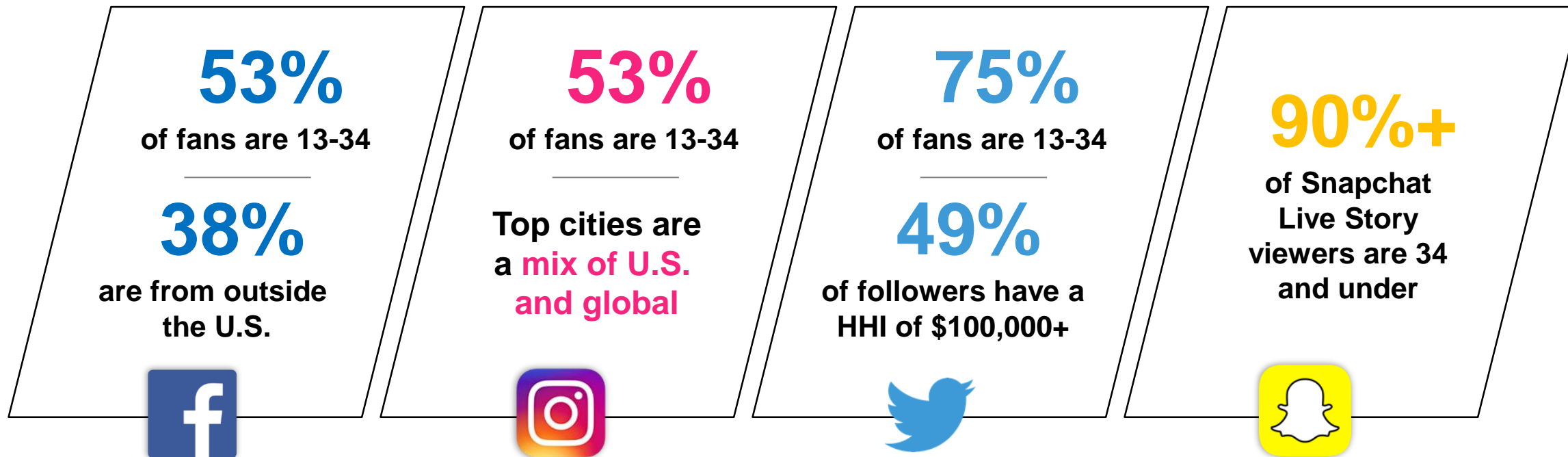
Male / Female Audience

NASCAR continues to rank as the #1 site for female concentration of visitors (36%) when compared to all major Sports League websites.



Social Media Audiences of NASCAR-owned Accounts

NASCAR social media efforts center around attracting, and engaging with, a younger, more diverse audience



NASCAR Fan Base Demographics

61% Male

39% Female



18-44 Years Old



1 OUT OF 3

Households with Children



\$71,000

Average Household Income



2 OUT OF 3

Home Owners



1 OUT OF 2

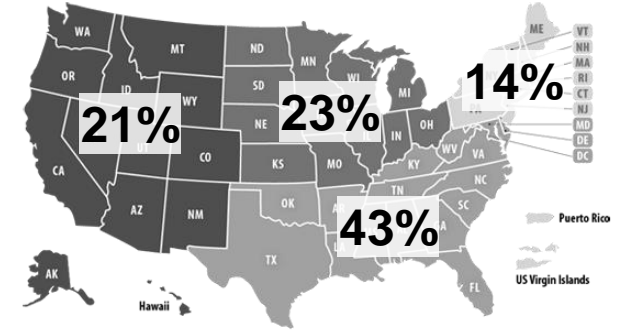
Some College or Beyond



25%

Multicultural

Geographic Distribution



Top 5 NASCAR Markets

(by number of people interested in the sport)

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

Fan Loyalty to Sponsors

Best-In-Class-Sponsors

More than **25%** of Fortune 500 companies

Nearly **50%** of Fortune 100 companies

Source: NASCAR Industry, 2018

Sponsor Loyal Fans

86% of NASCAR fans agree that NASCAR drivers couldn't run their car without sponsors

81% of NASCAR fans agree with the statement "I appreciate what a sponsor provides to the NASCAR experience"

Source: NASCAR Fan Engagement Tracker, Toluna, 2015

#1 in Fan Loyalty to Sponsors

NASCAR surpasses all other major US sports

#1 in avid fans who consider trying, consciously support, and recommend sponsors

#1 in advocacy for sponsor brands via social media

Sources: Turnkey Sports (results published in SBJ); Repucom (now Nielsen) on behalf of WME-IMG (results published in SBJ)

Millennial Fans

73% talk positively about brands that sponsor NASCAR, **63%** always buy products or services from NASCAR sponsors, **55%** switch brands specifically due to a NASCAR sponsorship

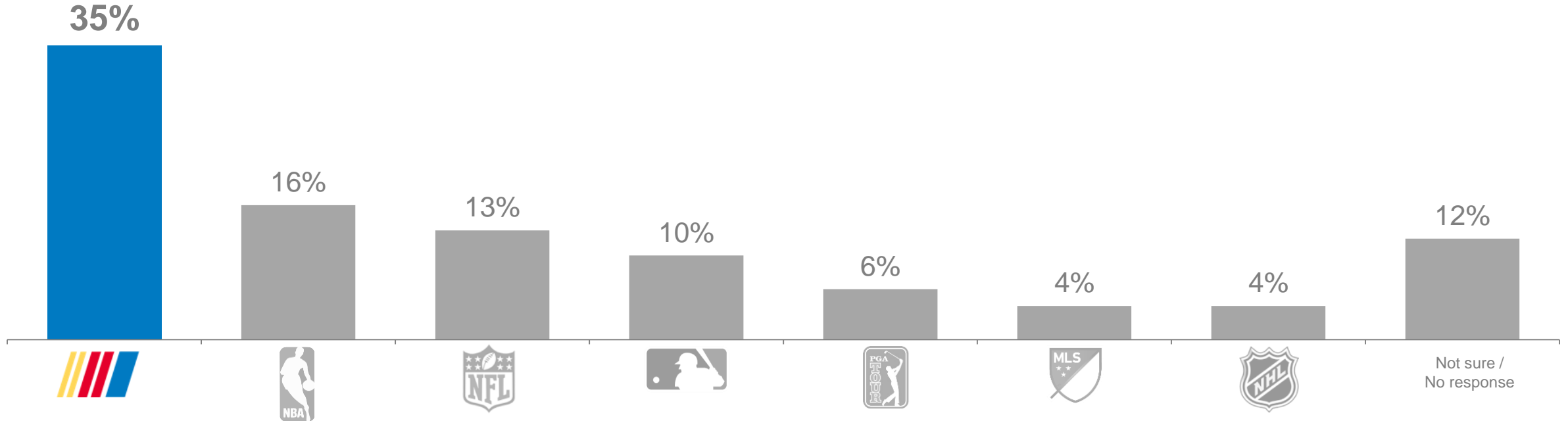
Source: NASCAR Fan Engagement Tracker, Toluna, 2015



Independent Research: NASCAR Is #1 in Opportunities for Sponsors

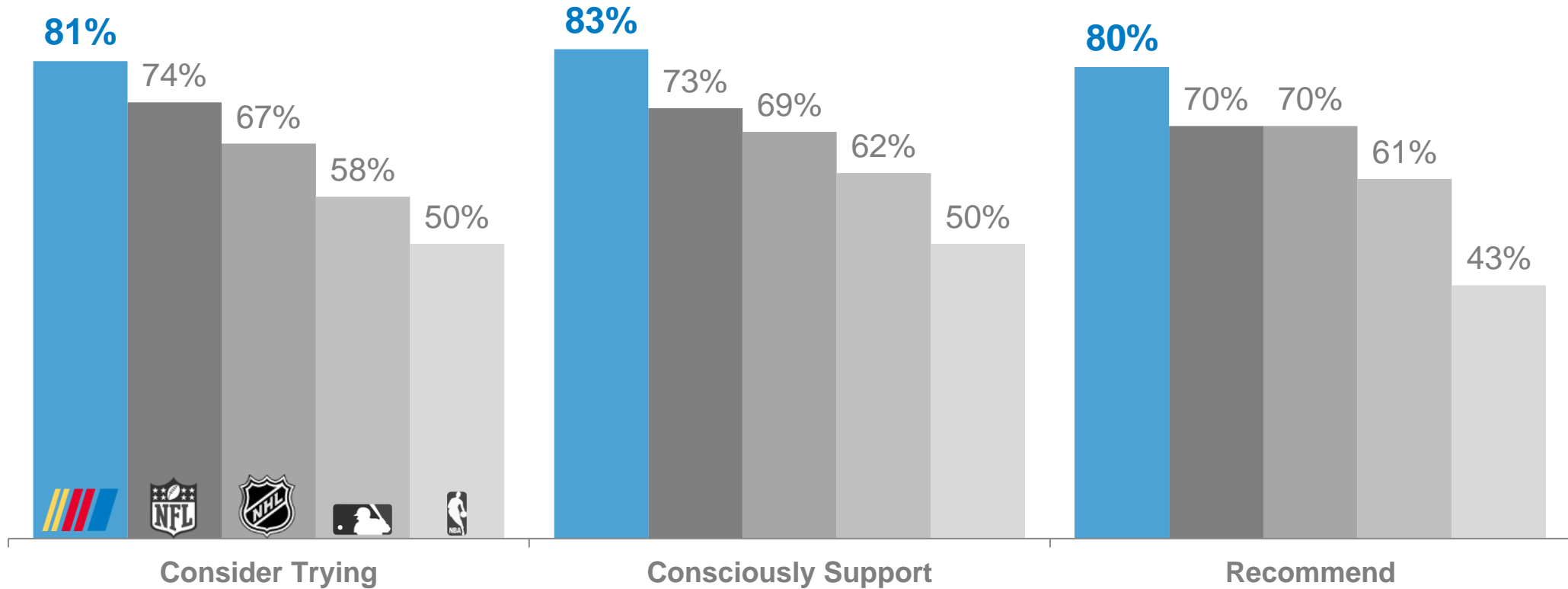
KEY INSIGHT: Independent research conducted by Turnkey Intelligence shows that NASCAR ranks #1 among sports industry executives when it comes to doing the best job of developing opportunities for brand engagement for sponsors.

Proportion of Sports Industry Executives who Indicate Each League Does the Best Job in Developing Opportunities for Brand Engagement for Sponsors



Independent Research: NASCAR Ranks #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



Independent Research: NASCAR Fans Are Responsive to Sponsors

KEY INSIGHT: NASCAR fans are more responsive to sponsorship than the Gen Pop.

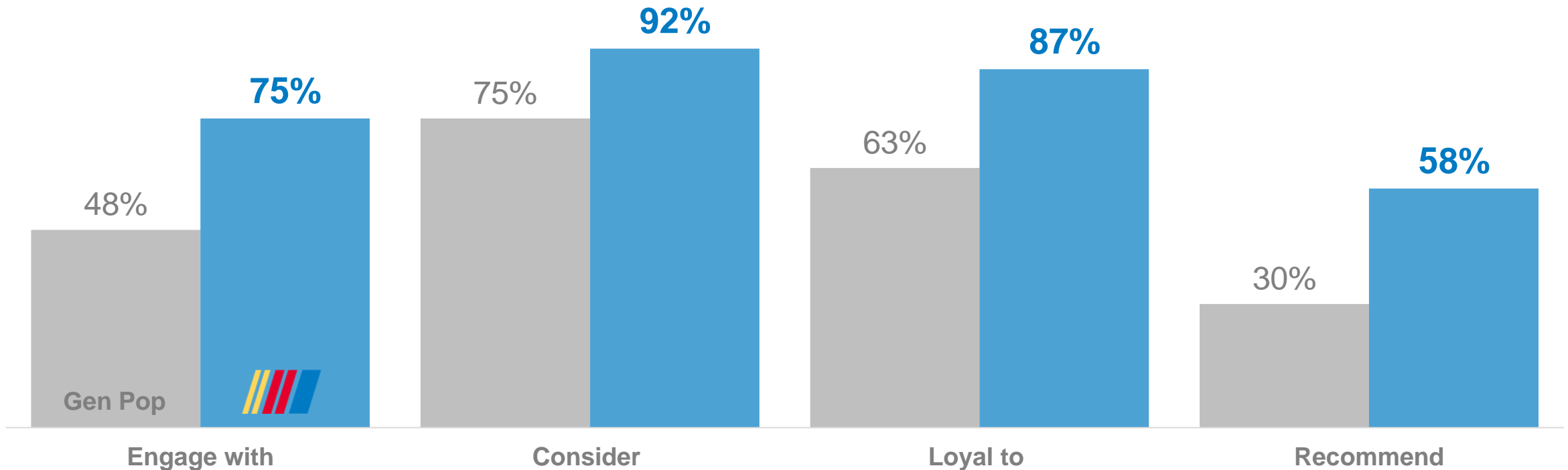
Compared to the Gen Pop, NASCAR fans are...

+56% more likely to **engage** with a sponsor brand

+23% more likely to **consider** a sponsor brand

+39% more likely to be **loyal** to a sponsor brand

+23% more likely to **recommend** a sponsor brand



Insight into Fan Connection with Sponsor Brands in NASCAR

Proportion of Avid NASCAR Fans who Agree with Each Statement about Sponsors

(Top 5 Box % Agree, 6, 7, 8, 9, or 10 on 10-pt scale)

