verizon indycar series

INDYCAR. THE HEART OF RACING.

Brand Demographics

FOUR KEYS TO THE AUDIENCE

1. **INDYCAR fans are a coveted demographic**
2. **INDYCAR fans move the needle for sponsors**
3. **The INDYCAR fan base is poised for growth**
4. **INDYCAR fans are active consumers**

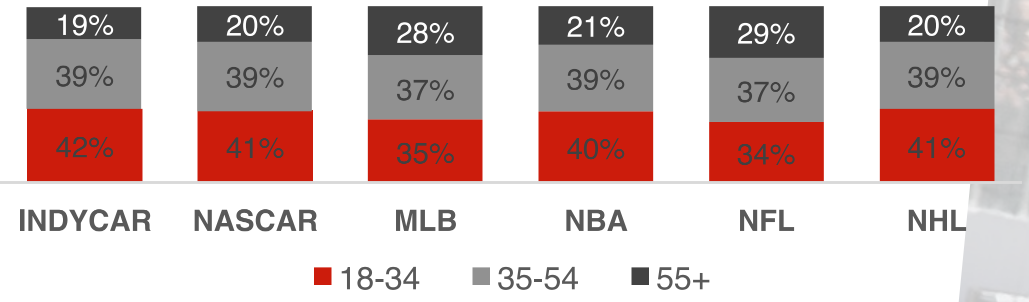
INDYCAR FANS ARE A COVETED DEMOGRAPHIC

There are
69million
INDYCAR fans in the US

66% of fans are male

INDYCAR fans have an average
HH Income of **$88,500+**

42% **of INDYCAR fans are Millennials, a higher share than NASCAR, or the Big 4 Sports**



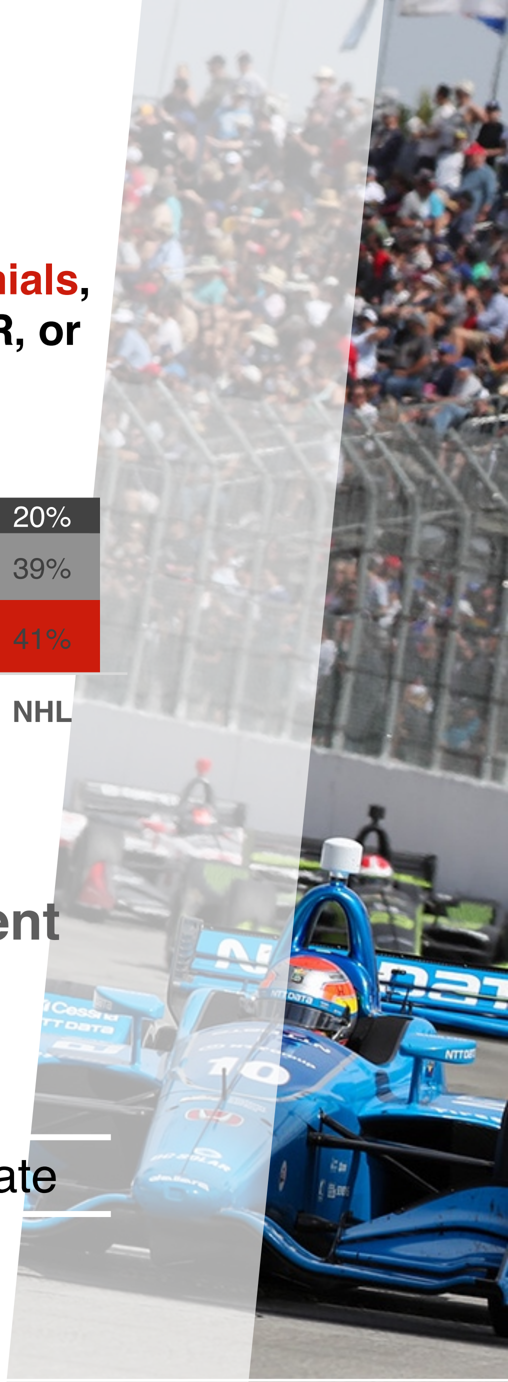
INDYCAR fans are also more affluent

…when compared to the general population

37% More likely to earn $75k+

22% More likely to be a college graduate

31% More likely to be employed



Sources: Nielsen Sports Sponsorlink 2017

INDYCAR FANS ARE RESPONSIVE TO SPONSORSHIP

What sponsors want to know about INDYCAR Fans…

"Will an INDYCAR sponsorship **change the behavior** of INDYCAR fans?"

YES – INDYCAR fans are very likely to **respond to sponsorship**

After seeing a sponsorship while watching a game/event in person or on TV…

80% of INDYCAR fans engaged* with a brand seen. That is higher than…

General Population	47%
NASCAR	75%
NHL	72%
NBA	69%
MLB	63%
NFL	59%

Source: Nielsen Sports Sponsorlink 2017. Fans defined as self identifying between 6-10 on Fan Avidity Scale of 0-10.
*Engagement refers to visiting the brands website, researched reviews of the brand, bought the brand, talked to friends/family about the brand, connected with the brand on social media, blogged about the brand, tweeted about the brand or posted on Facebook about the brand.

INDYCAR FANS CHANGE THEIR BEHAVIOR BASED ON SPONSORSHIP

30%

engaged with brands after seeing sponsorship on television

80%

more likely to **buy** a sponsor's product than the general population

94%

are somewhat or very likely to **consider** a brand after seeing a sponsor

90%

are very or somewhat **loyal** towards a brand that sponsors their sport

Source: Nielsen Sports Sponsorlink 2017.

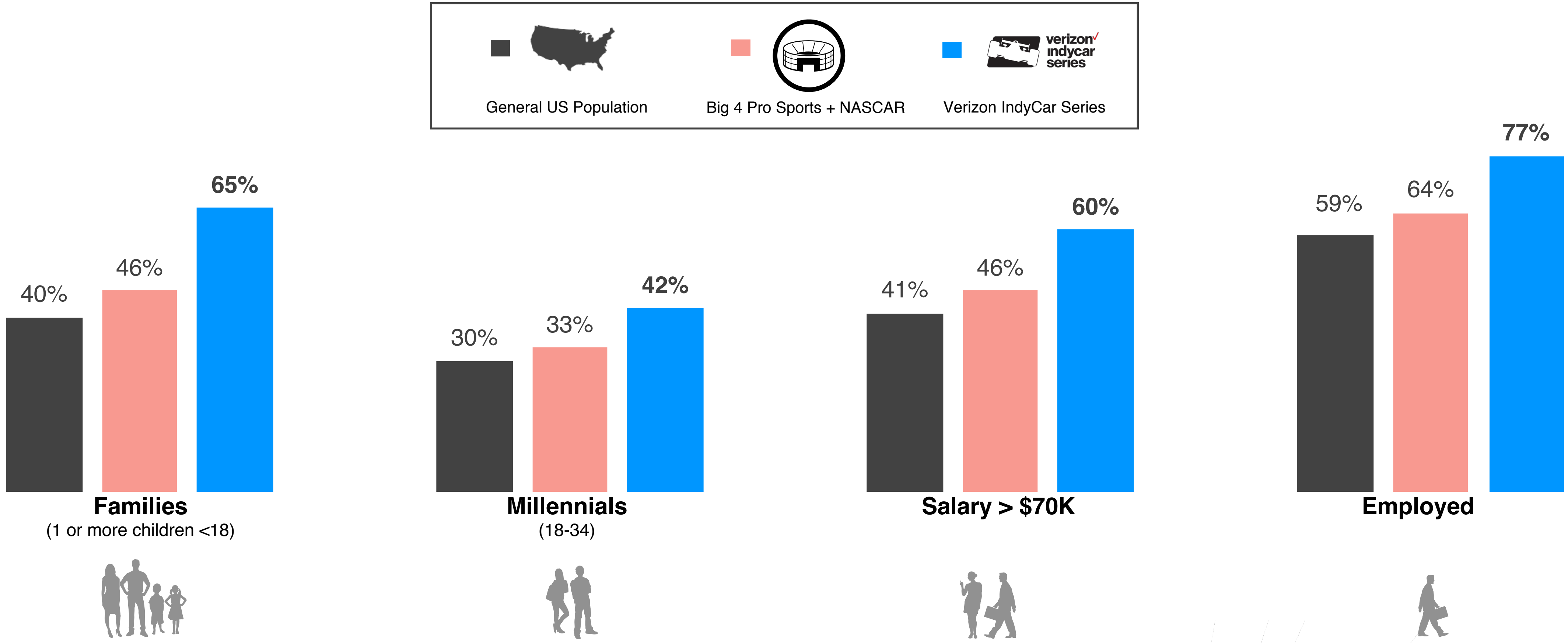
INDYCAR FANS ARE MORE RECEPTIVE THAN FANS OF THE BIG 4 AND NASCAR

	General Population	Verizon IndyCar Series	NASCAR	Major League Baseball	NBA	NFL	NHL
I feel **loyal** towards companies that sponsor an event or sport I follow.*	63%	90%	87%	77%	82%	74%	83%
When a company sponsors an event or sport that I follow, I am likely to **consider** that company's brand, product(s), or service(s) for the first time.*	75%	94%	92%	85%	89%	84%	89%
After seeing a sponsorship while watching a game/event in-person or on TV, I **bought** the brand.	16%	30%	28%	23%	25%	22%	27%
After seeing a sponsorship while watching a game/event in-person or on TV, I **talked about** the brand to friends and family.	21%	36%	35%	29%	32%	27%	32%

Source: Nielsen Sports Sponsorlink 2017. Fans defined as self identifying between 6-10 on Fan Avidity Scale of 0-10.
*Percentages reflect percent of fans who are very or somewhat loyal and are somewhat likely or very likely to consider.

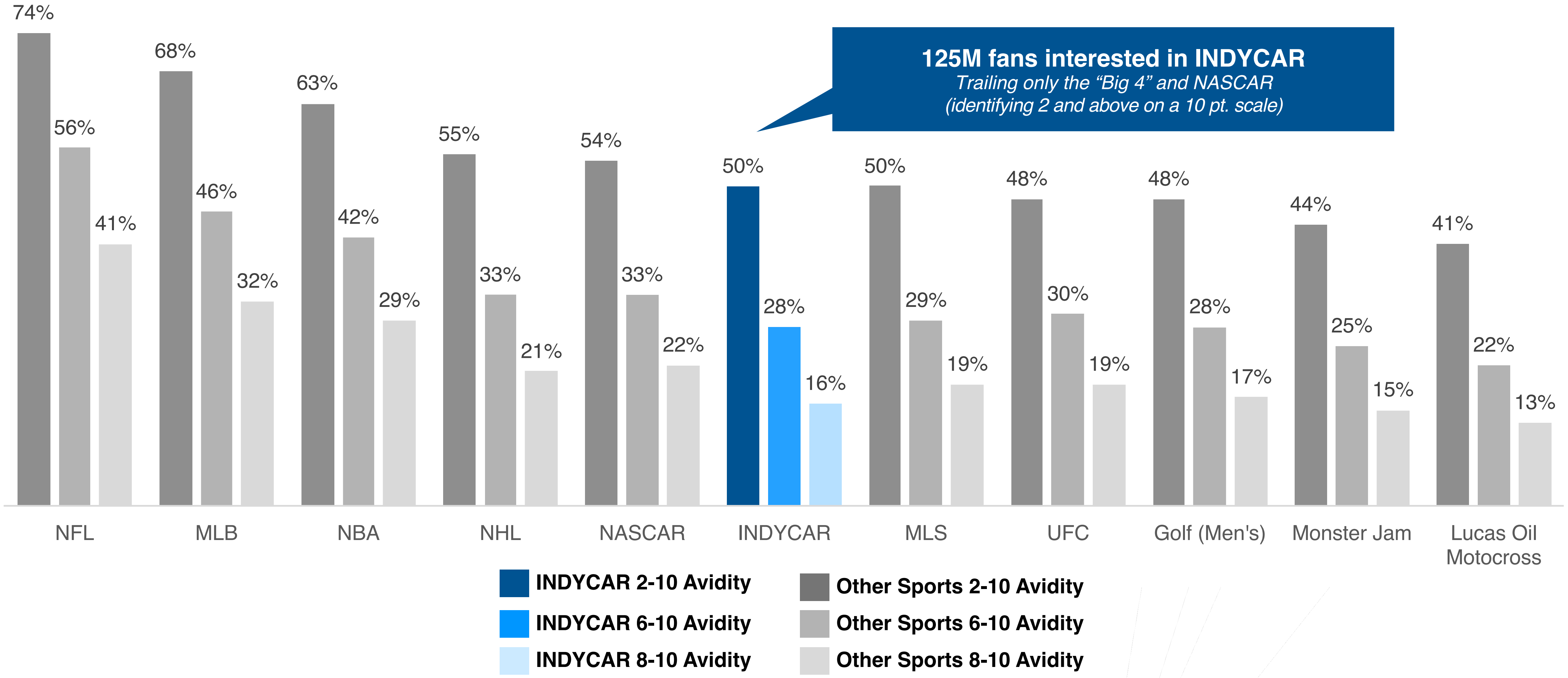
INDYCAR DELIVERS A MORE ATTRACTIVE FAN

Versus fans of other sports…
INDYCAR fans are more likely to be **young**, with **families** and **employed** earning **$70,000+**



Source: Nielsen Sports Sponsorlink 2017 (Total size based on 250M adults 18+)
Fans defined as self identifying between 6-10 on Fan Avidity Scale of 0-10. Other sports reflects the average of NBA, NFL, MLB, NHL, and NASCAR.
Among those INDYCAR fans who are not employed: 9.8% are not employed/disabled/unable to work; 11.0% are retired; 2.1% are full-time students.

HALF OF THE U.S. HAS SOME INTEREST IN INDYCAR



Source: Nielsen Sports Sponsorlink 2017. Fan = 2-10 and 6-10 on Fan Avidity Scale of 0-10; Fan sizing based on 250M Adults 18+.

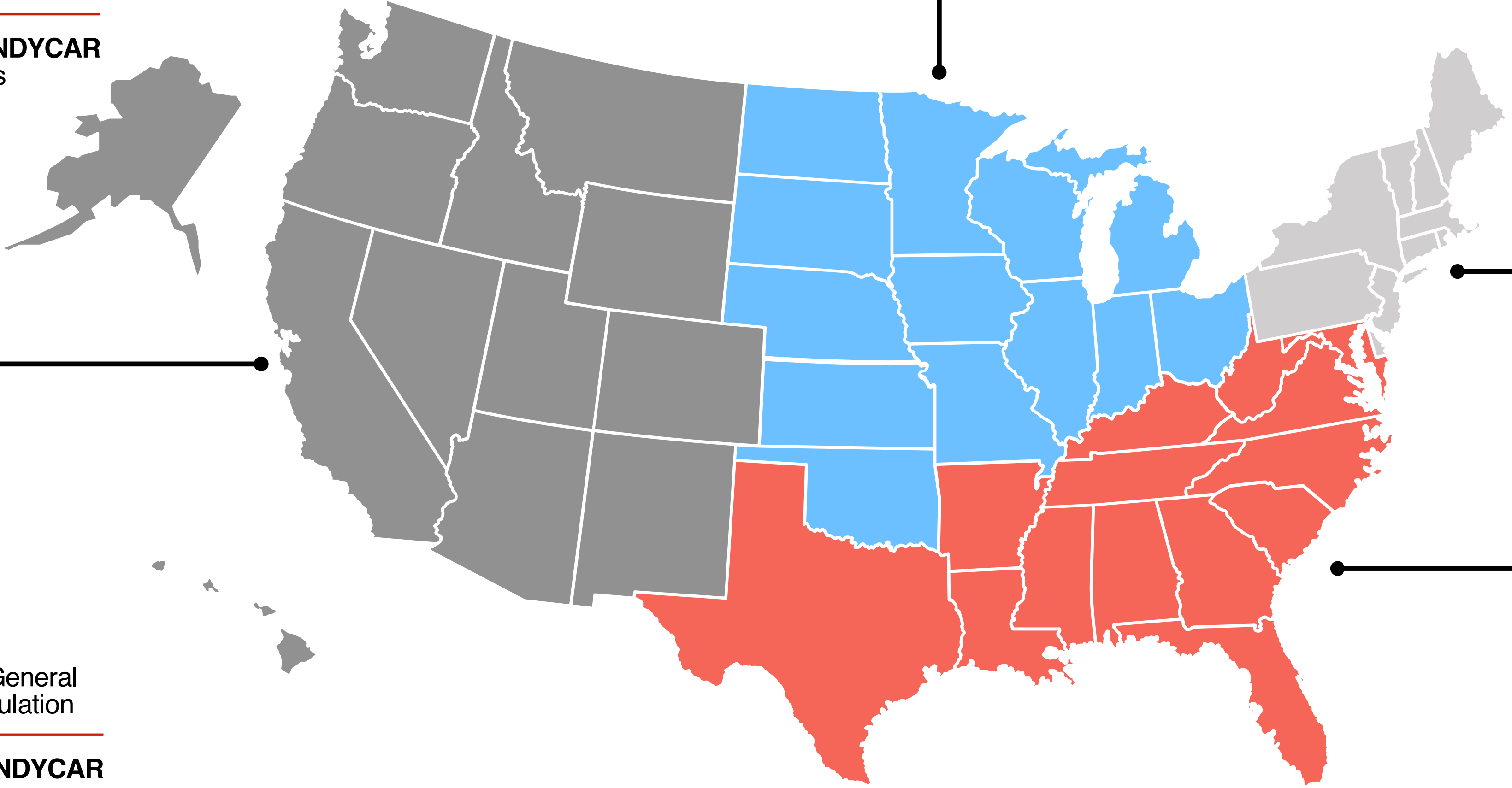
INDYCAR OFFERS A NATIONAL FAN BASE

18% Of General Population

25% Of **INDYCAR** Fans

20% Of General Population

15% Of **INDYCAR** Fans



26% Of General Population

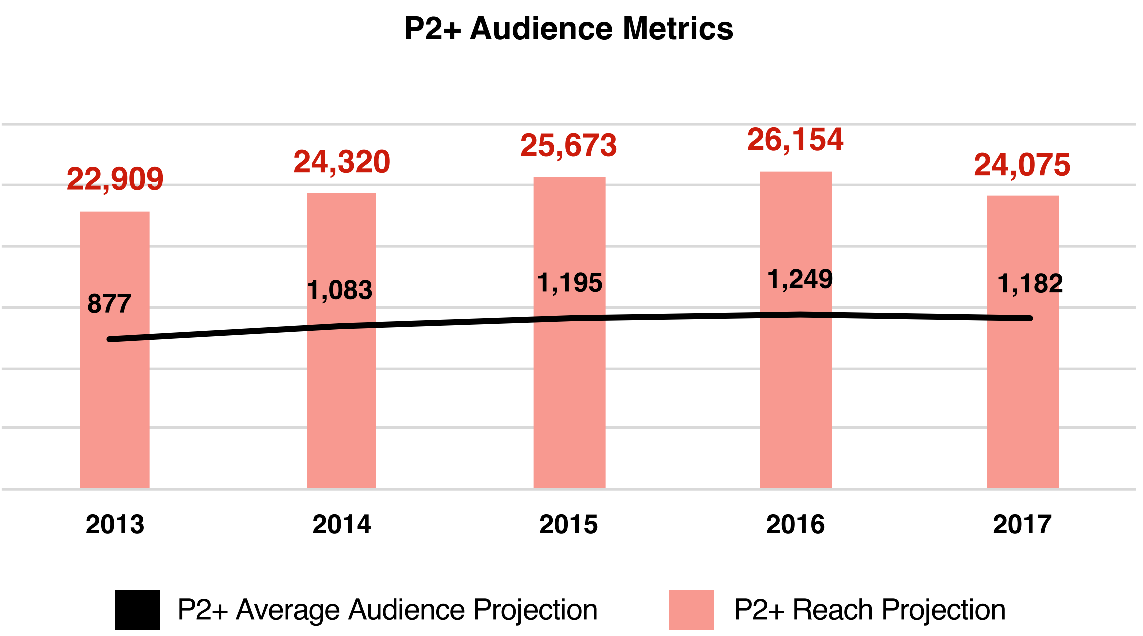
25% Of **INDYCAR** Fans

36% Of General Population

35% Of **INDYCAR** Fans

Source: Nielsen Sports Scarborough Multi-Market 2017 Release 2 (June 2017 – November 2017),
Fans defined as having Watched, Attended or Listened to an INDYCAR event over the past 12 months.
Percentages based on interest level (Very and Somewhat) are as follows: Northeast (15%), South (36%), Midwest (20%) and West (29%).

TV AUDIENCE HAVE GROWN OVER THE PAST 5 YEARS



Fan Base Size (8-10) to Viewership (P2+) Ratio			
Sport	Fan Base Size	Average Audience (P2+)	Percentage of Fan Base Watching
NFL	103,212,102	15,276,000	14.80%
NASCAR*	53,780,891	3,646,000	6.78%
NBA	72,438,022	1,833,000	2.53%
INDYCAR	40,681,342	981,000	2.41%
NHL	52,158,207	842,000	1.61%
MLB	78,645,969	1,075,000	1.37%

+5.5% higher P2+ Average Audience than previous 5-year average

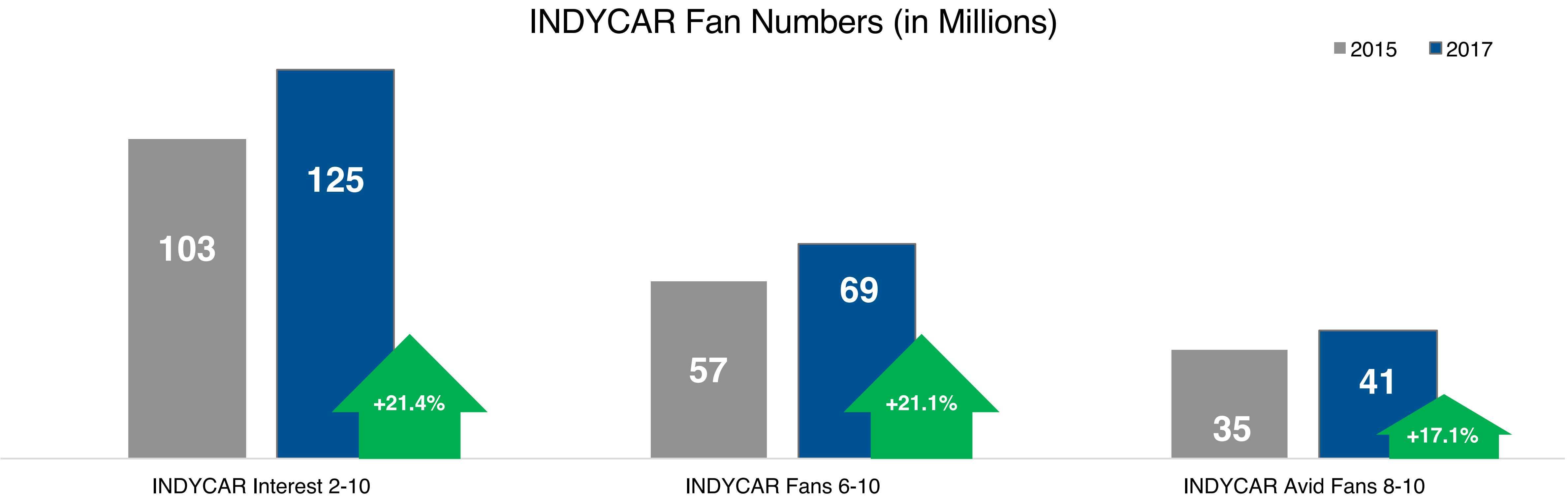
+4.3% increase in the average # of telecasts watched vs 2016

+12.1% increase in the average minutes watched vs 2016

2.41% of INDYCAR fans are watching during the average TV broadcast minute – a similar ration to NBA and a higher ratio than the NHL or MLB

Source: Nielsen National Toolbox. Ratings & Reach Analyses. All Live Race Events, Indianapolis 500 Qualifying and Indianapolis Pre-Race Included.
Nielsen Sports Sponsorlink 2017, Fandom provided at 8-10. Average Audience pulled from Nielsen Sports Rates and Ratings file.
*Viewership reflects Monster Energy NASCAR Cup Series

INDYCAR FANS HAVE GROWN ACROSS ALL AVIDITY LEVELS



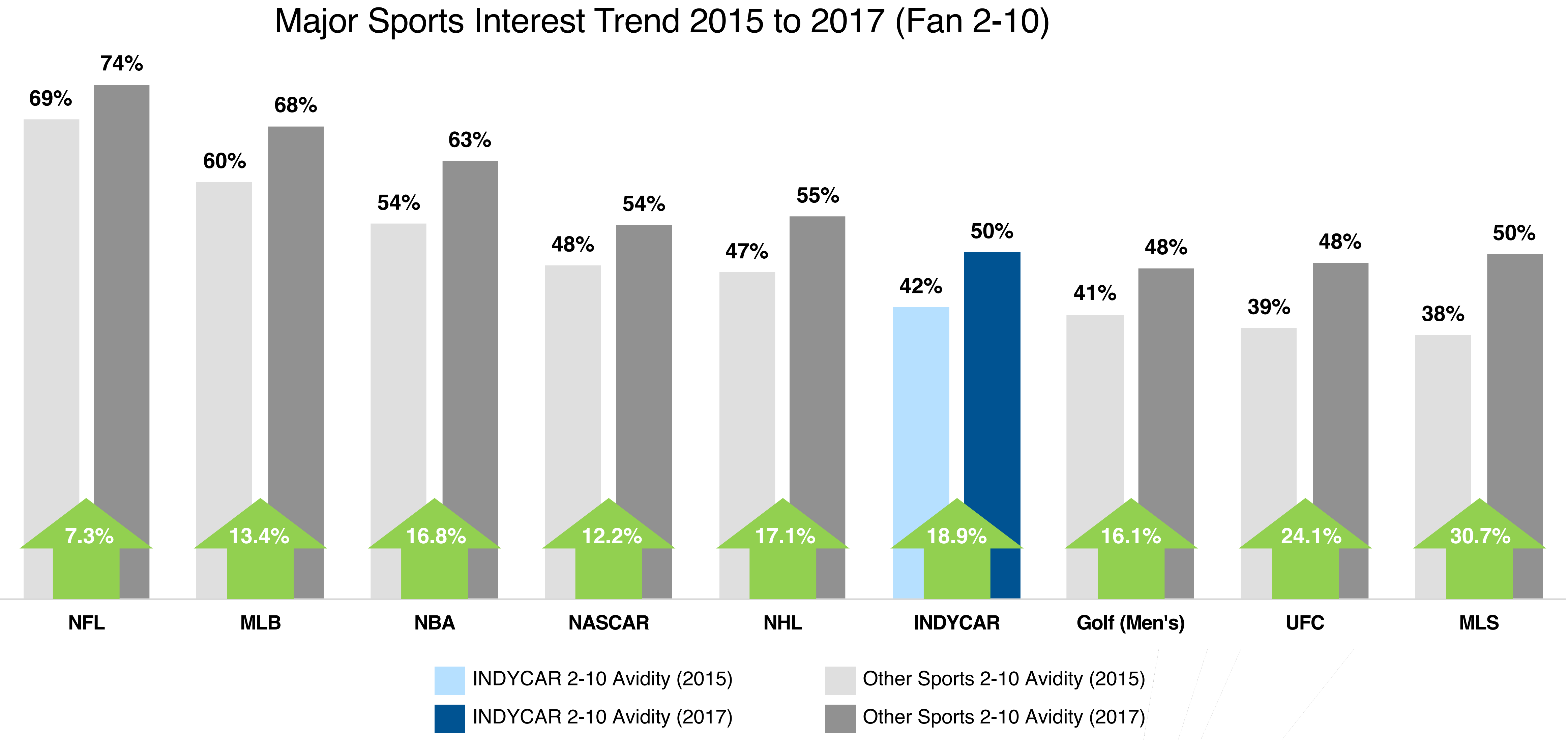
Includes core fans plus those with more casual interest in the sport

Moderate to avid fan base defined for the purposes of this exercise

Avid fan base defined for the purposes of this exercise

Source: Nielsen Sports Sponsorlink 2015 & 2017.
Note: The method of defining fans as 6-10 on a 10-point scale compares to the often communicated 75 million NASCAR fan base size.

INDYCAR INTEREST IS GROWING MORE THAN OTHER SPORTS



Source: Nielsen Sports Sponsorlink 2015 & 2017 . Fan = 2-10 on Fan Avidity Scale of 0-10; 2015 Fan sizing based on 245M Adults 18+, 2017 Fan sizing based on 250M Adults 18+. Monster Jam 2-10 Avidity (2017) 44%, Lucas Oil Motocross 2-10 Avidity (2017) 41%.

INDYCAR FANS ARE ACTIVE CONSUMERS

Car Fanatics

- **38% of fans** say they are "pumped up about cars"
- **31% of fans** consider themselves automotive enthusiasts
- **35% more likely** to purchase a new car in the next year

Active

- **19% more likely** to visit a casino
- **21% more likely** to go on a cruise
- **73% more likely** to go on a golf/tennis vacation
- **29% more likely** to have shopped at a sporting goods store

DIYers

- **16% more likely** to have shopped at a large appliance store
- **24% more likely** to have performed any labor on a household car
- **14% more likely** to have done an addition to their home

Business Minded

- **13% more likely** to be involved in a company purchasing decision
- **19% of fans** are self-employed or own a small business

Outdoor Enthusiasts

- **15% more likely** to go boating
- **11% more likely** to go camping
- **51% more likely** to go hunting
- **5% more likely** to go skiing/snowboarding

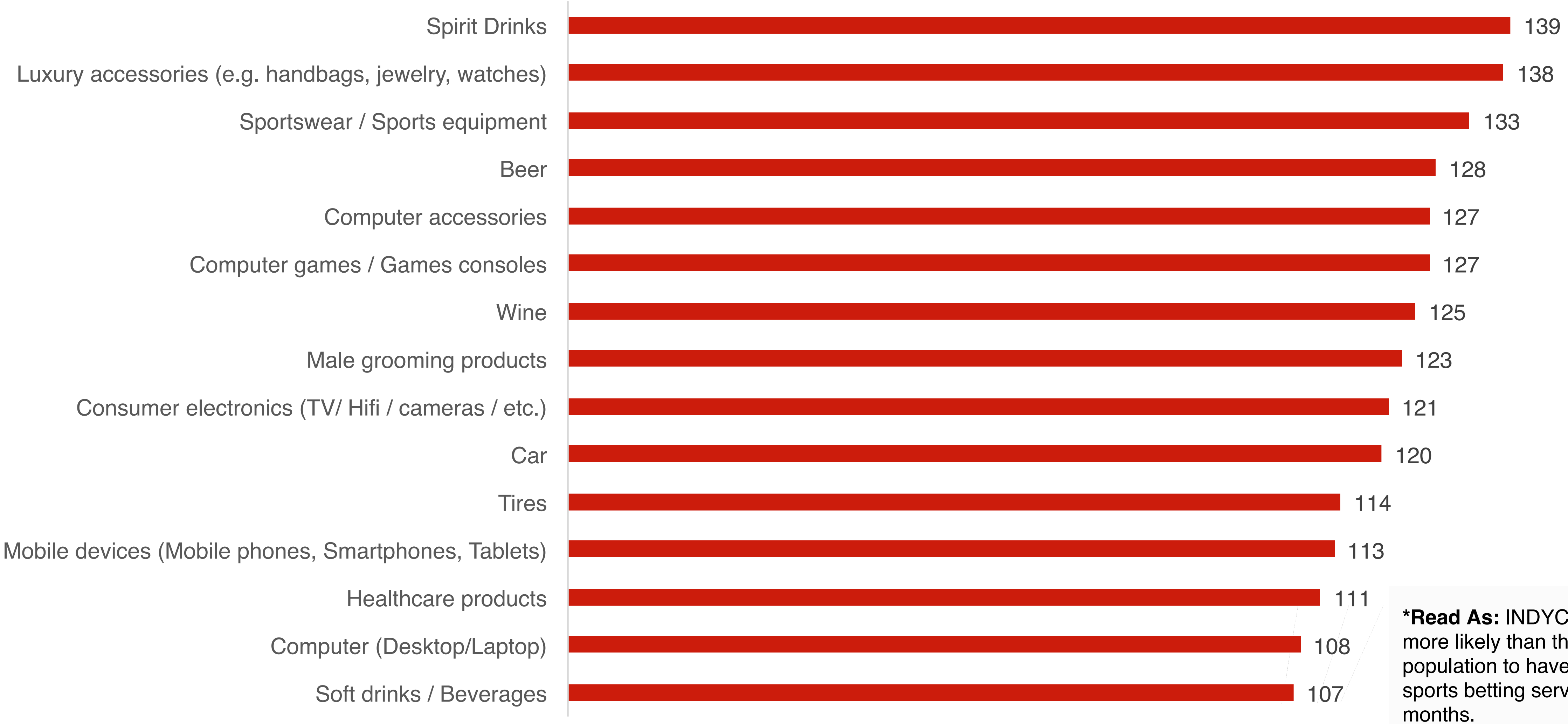
Food & Beverage

- **42% more likely** to attend a food/wine festival
- **47% more likely** to drink bourbon
- **25% more likely** to drink beer

Sources: Nielsen Scarborough November 2017
more likely in reference to the average US population

INDYCAR FAN CONSUMPTION HABITS

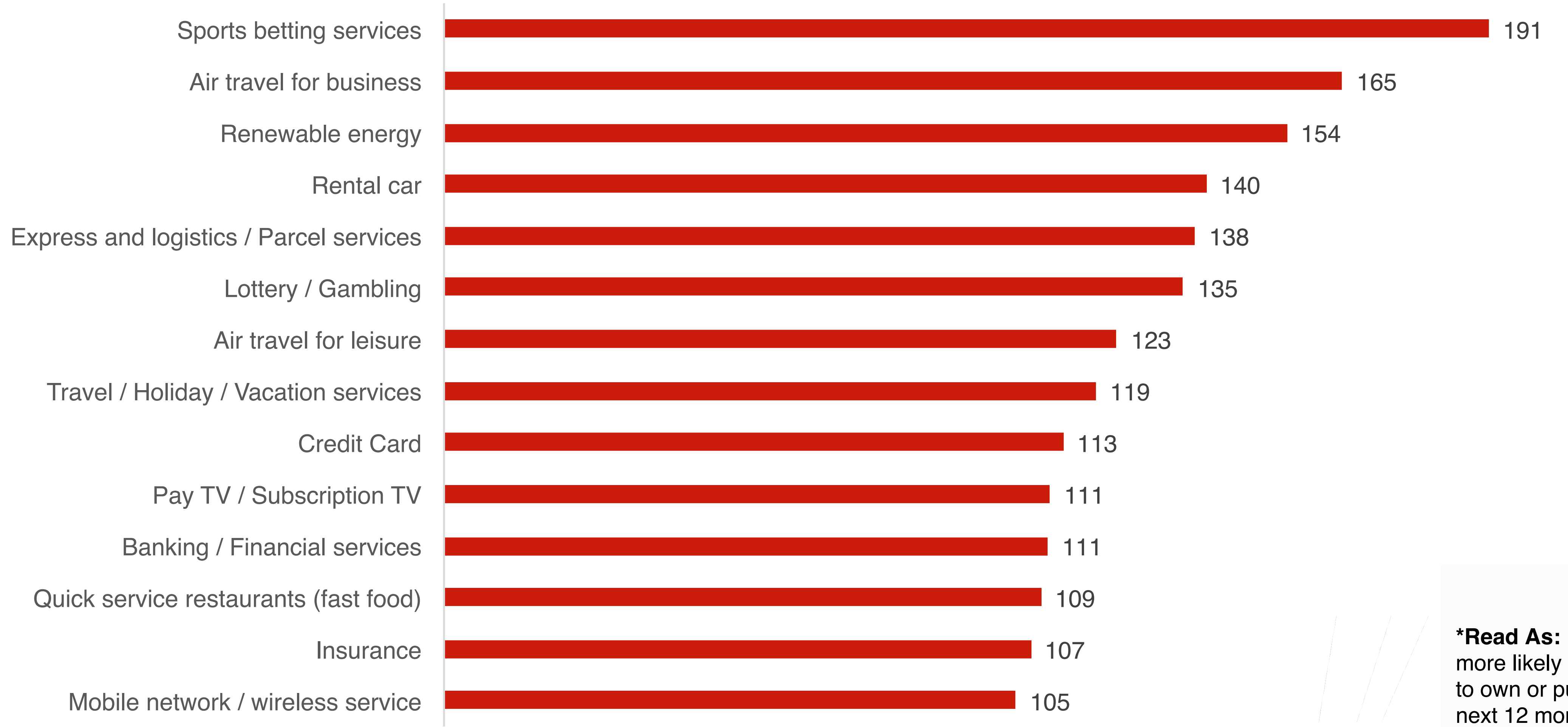
Category Purchase Behavior Among INDYCAR Fans



***Read As:** INDYCAR Fans are 91% more likely than the general population to have use or plan to use sports betting services in the next 12 months.

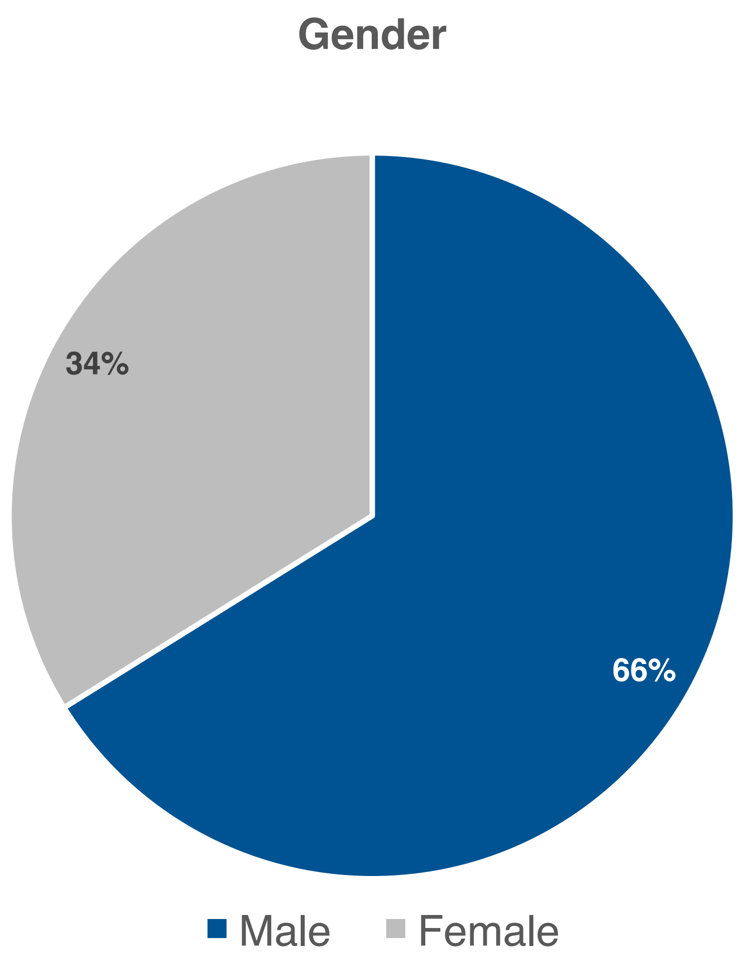
INDYCAR FAN CONSUMPTION HABITS

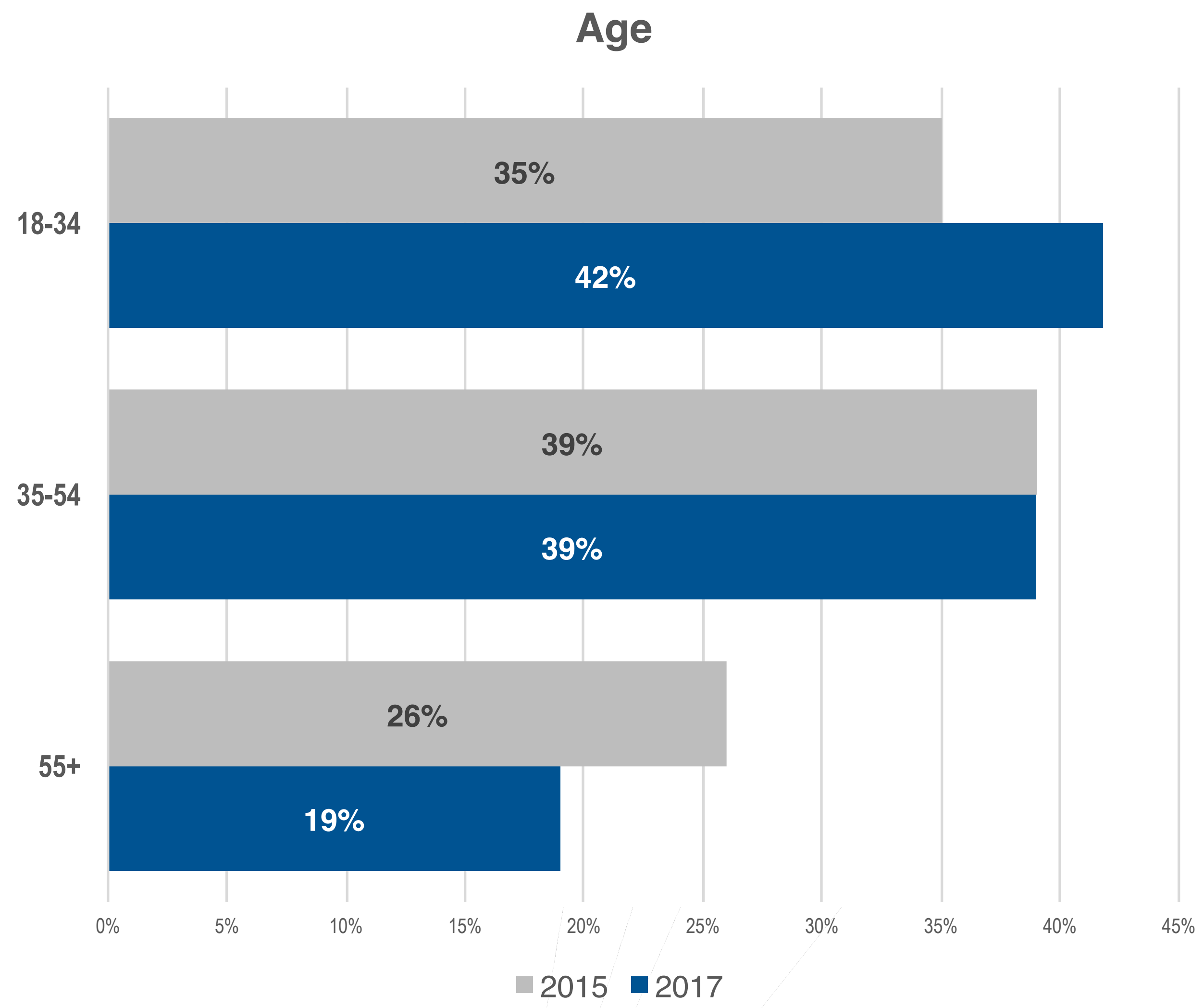
Category Services Behavior Among INDYCAR Fans



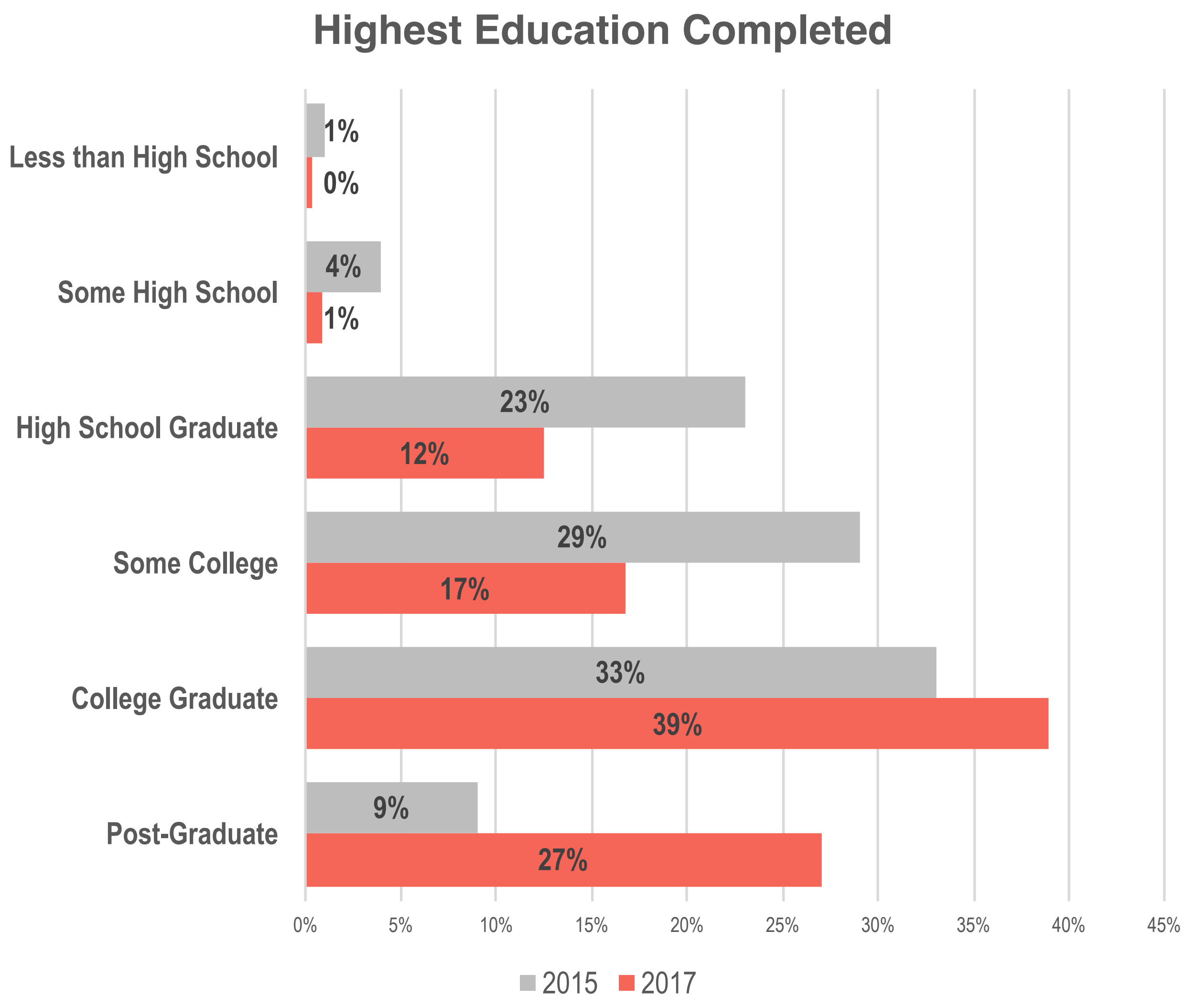
***Read As:** INDYCAR Fans are 39% more likely than the general population to own or purchase Spirit Drinks in the next 12 months.

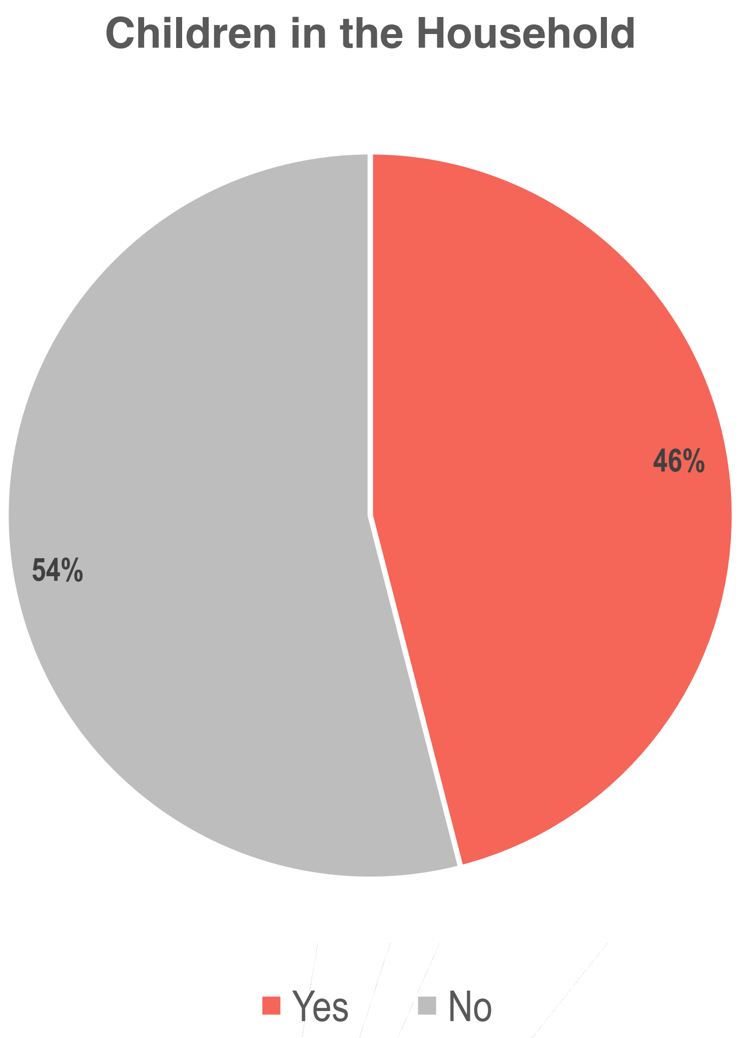
DEMOGRAPHIC BREAKDOWN



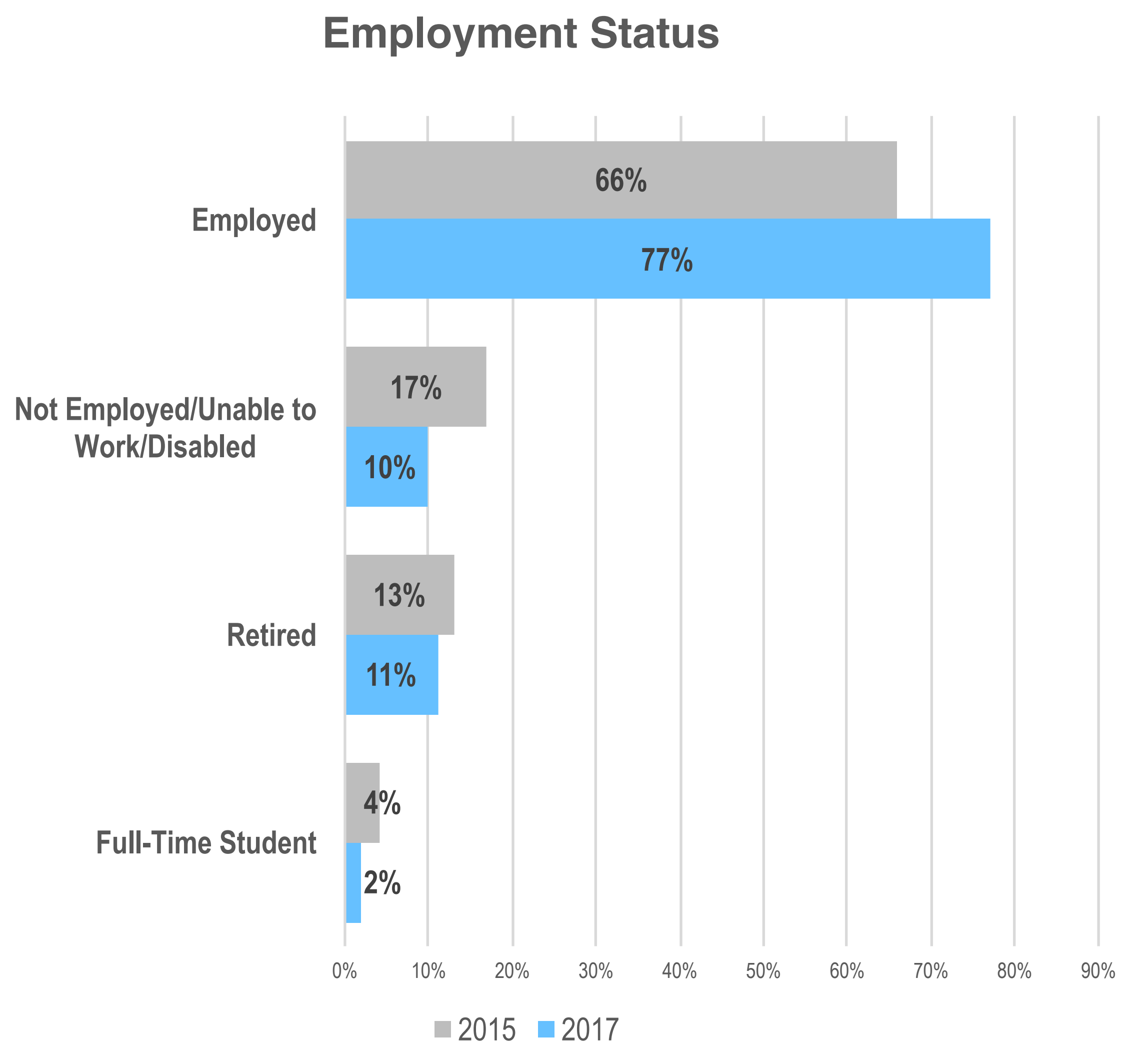


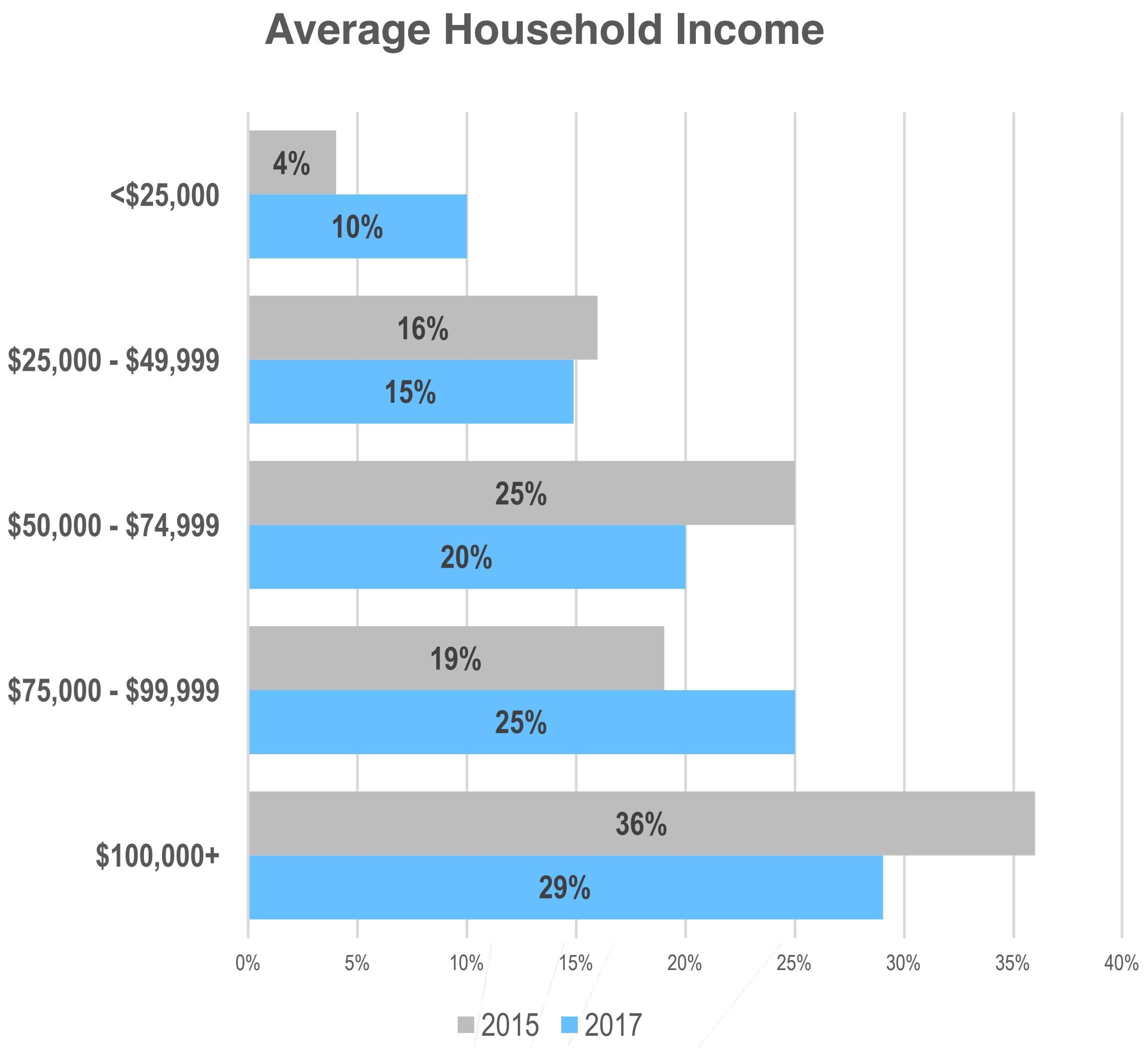
DEMOGRAPHIC BREAKDOWN



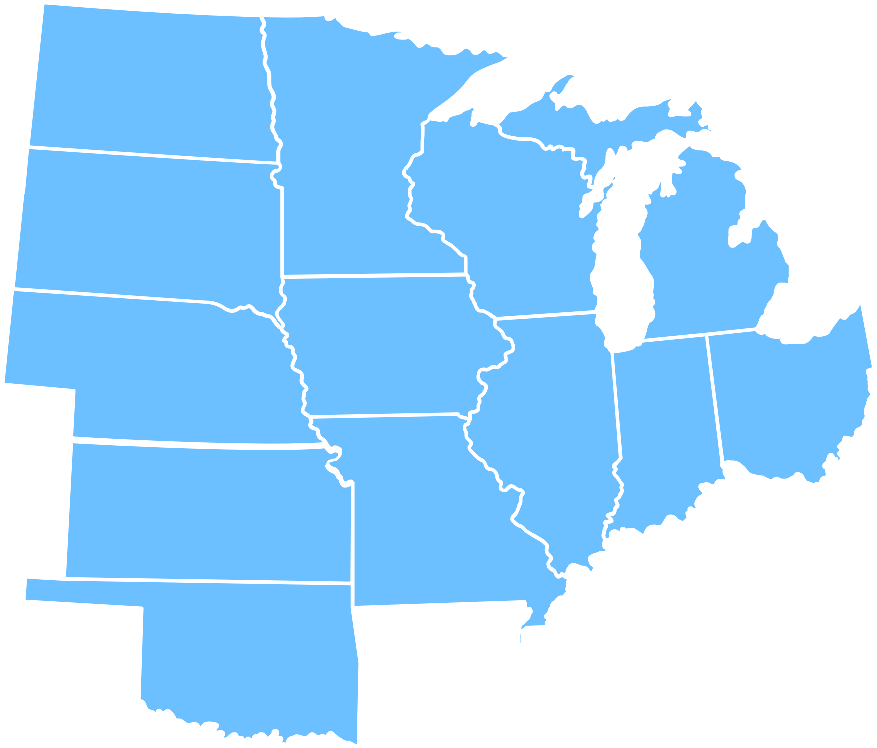


DEMOGRAPHIC BREAKDOWN





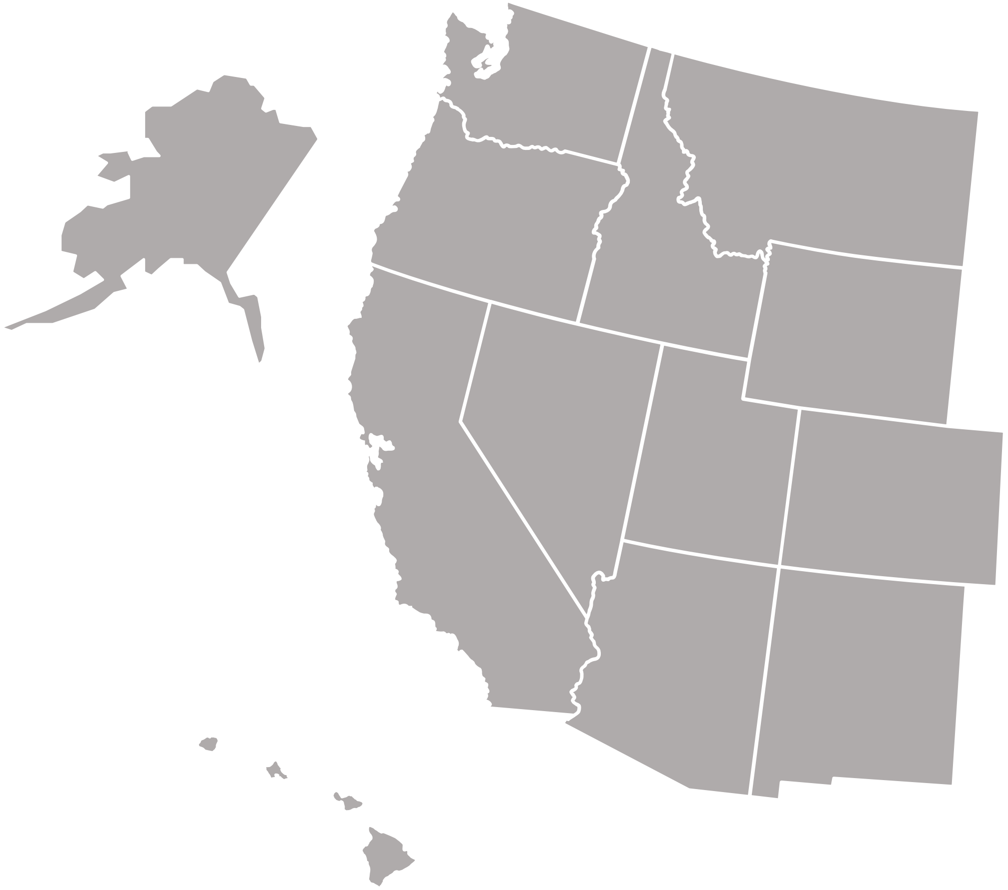
TOP MARKETS BY REGION



MIDWEST – TOP 5 MARKETS (WAL)				
Rank	Market	Total WAL	WAL % (US)	WAL % (Region)
1	Indianapolis, IN	837,005	7.3%	29.2%
2	Chicago, IL	519,913	4.5%	18.2%
3	Detroit, MI	192,051	1.7%	6.7%
4	Cleveland, OH	190,112	1.7%	6.6%
5	Minneapolis, MN	163,597	1.4%	5.7%

MIDWEST – TOP 5 MARKETS (AVG HH)			
Rank	Market	Average HH	Avg Rtg %
1	Indianapolis, IN	32,000	2.9%
2	Chicago, IL	19,000	0.6%
3	Detroit, MI	11,000	0.6%
4	Cleveland, OH	11,000	0.7%
5	Milwaukee, WI	9,000	1.0%

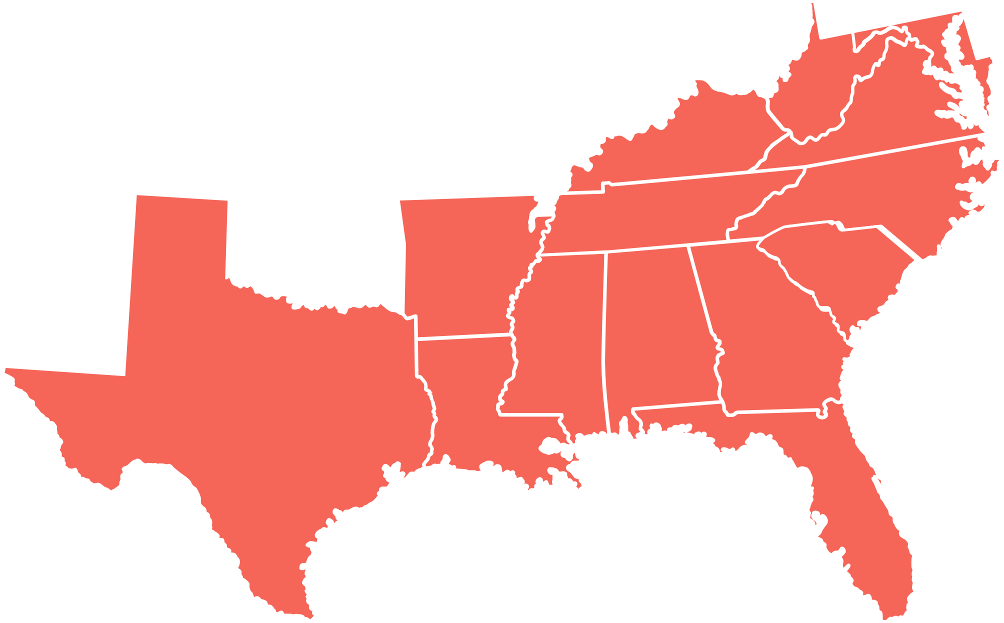
TOP MARKETS BY REGION



WEST – TOP 5 MARKETS (WAL)				
Rank	Market	Total WAL	WAL % (US)	WAL % (Region)
1	Los Angeles, CA	658,257	5.7%	23.1%
2	San Francisco, CA	325,578	2.8%	11.4%
3	Phoenix, AZ	278,657	2.4%	9.8%
4	Sacramento, CA	266,964	2.3%	9.4%
5	Denver, CO	248,401	2.2%	8.7%

WEST – TOP 5 MARKETS (AVG HH)			
Rank	Market	Average HH	Avg Rtg %
1	Los Angeles, CA	32,000	0.6%
2	Phoenix, AZ	18,000	1.0%
3	San Francisco, CA	13,000	0.5%
4	Seattle, WA	10,000	0.6%
5	Denver, CO	9,000	0.5%

TOP MARKETS BY REGION



SOUTH – TOP 5 MARKETS (WAL)				
Rank	Market	Total WAL	WAL % (US)	WAL % (Region)
1	Atlanta, GA	342,440	3.0%	8.4%
2	Dallas, TX	341,655	3.0%	8.4%
3	Houston, TX	320,561	2.8%	7.9%
4	Tampa, FL	319,447	2.8%	7.9%
5	Orlando, FL	197,343	1.7%	4.9%

SOUTH – TOP 5 MARKETS (AVG HH)			
Rank	Market	Average HH	Avg Rtg %
1	Dallas, TX	16,000	0.6%
2	Nashville, TN	12,000	1.2%
3	Houston, TX	11,000	0.5%
4	Orlando, FL	10,000	0.7%
5	Tampa, FL	10,000	0.5%

TOP MARKETS BY REGION

NORTHEAST – TOP 5 MARKETS (WAL)				
Rank	Market	Total WAL	WAL % (US)	WAL % (Region)
1	New York, NY	670,833	5.8%	39.4%
2	Philadelphia, PA	319,544	2.9%	18.7%
3	Boston, MA	149,475	1.3%	8.8%
4	Hartford, CT	113,505	1.0%	6.7%
5	Pittsburgh, PA	105,480	1.0%	6.2%

NORTHEAST – TOP 5 MARKETS (AVG HH)			
Rank	Market	Average HH	Avg Rtg %
1	New York, NY	18,000	0.3%
2	Philadelphia, PA	18,000	0.6%
3	Pittsburgh, PA	7,000	0.6%
4	Boston, MA	5,000	0.2%
5	Hartford, CT	5,000	0.5%