

Sponsorship Research Final Report

Presented to



May 16, 2013

Research Objectives

In February 2013, a national research study was commissioned to be conducted among three specific constituencies: consumers, NASCAR fans, and members of the United States Army National Guard. Specific objectives of this research included measurement of the following key objectives:

- Interest in various types of professional sports, including NASCAR and other professional motorsports
- Impact of perceived patriotism and sports/athlete affiliations on product or service consideration
- Awareness of the National Guard sponsorship of Dale Earnhardt, Jr.'s #88 NASCAR Sprint Cup race team
- Favorability towards the association of the National Guard with the 88 team
- Attitudes and opinions regarding the association of the military with professional sports, specifically related to recruitment

The research results contained within this report focus primarily on the following segment types: National Guard members, a national consumer sample in which NASCAR fans naturally occur and are included, and consumer sub-samples defined by whether or not the respondent is a fan of (a) professional sports in general, or (b) NASCAR.

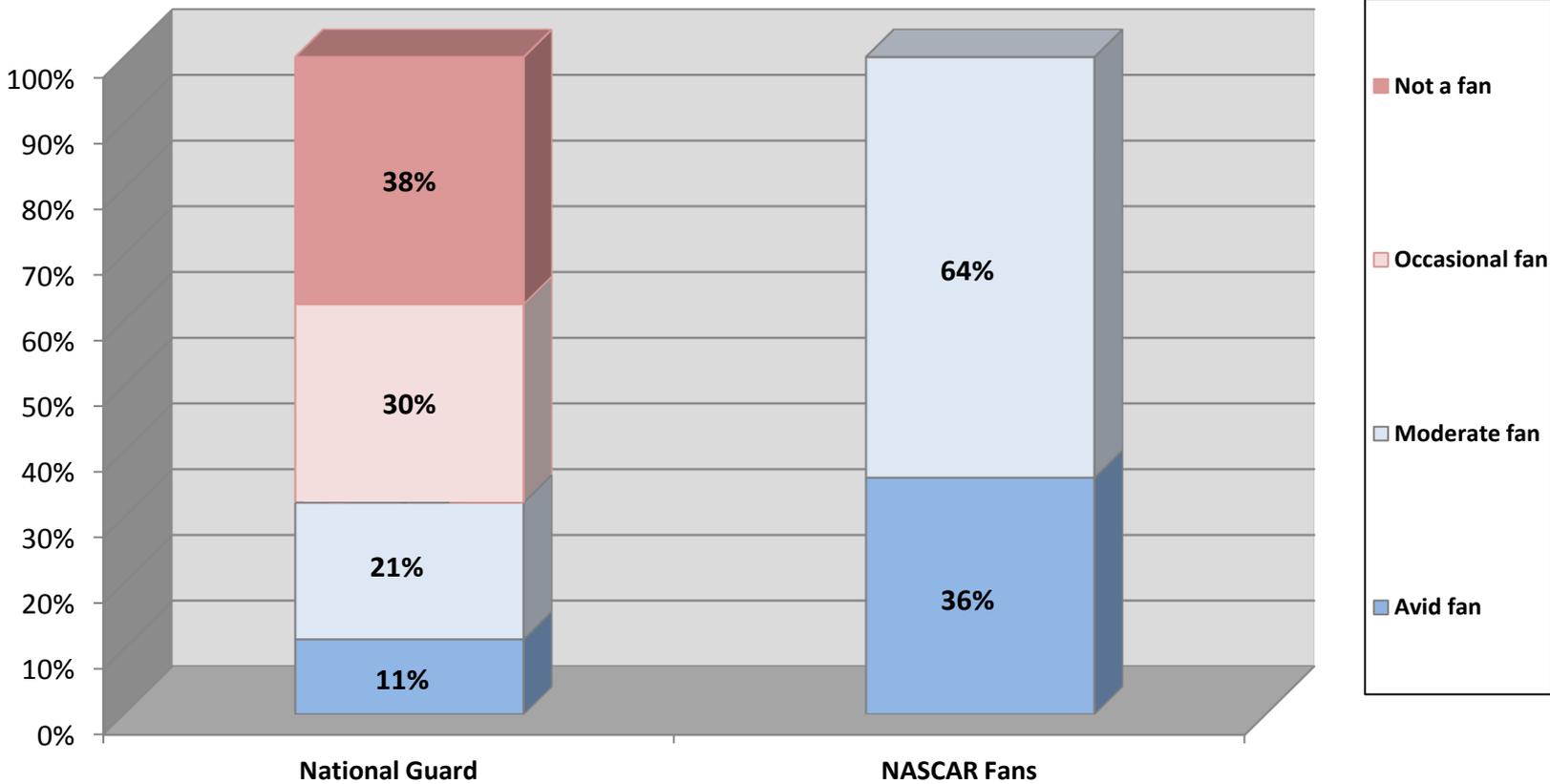
National Guard Phase:

- **Over 1,350 interviews conducted with National Guard members who either enlisted or re-enlisted between 2007-2013**
- **Combination of web-based and telephone surveys**
- **National in scope, using National Guard association member listings**
- **All classes of Guard members represented in survey**

Consumer/NASCAR Fan Phase:

- **Consumer Segment**
 - **Web survey of 1,252 consumers**
 - **National in scope**
 - **Basic demographics of survey sample consistent with census statistics**
- **NASCAR Fan Segment**
 - **750 additional interviews with consumers who self-describe as *avid* or *moderate* fans of NASCAR ; combined with NASCAR fans in base consumer segment, for a total of 901**
 - **National in scope**
- **Surveys fielded between April 3-27, 2013 (National Guard survey) and April 19-May 3, 2013 (consumer/NASCAR fan survey).**

NASCAR Fan Identification



Would you consider yourself a NASCAR fan?
All respondents

PERCEPTION OF NASCAR, OTHER PROFESSIONAL SPORTS, AND SELECTED PROFESSIONAL ATHLETES



Interest in NASCAR and Other Prof

<i>How interested are you in each of the following sports? (Percent "Very Interested")</i>	Guard Members	NASCAR Fans
FOOTBALL	53%	65%
MAJOR LEAGUE BASEBALL	32%	40%
NASCAR OR OTHER PROFESSIONAL MOTORSPORTS	23%	57%
LOCAL PRO SPORTS SUCH AS MINOR LEAGUE BASEBALL/ HOCKEY, ARENA FOOTBALL, OR SHORT-TRACK RACING	23%	16%
NATIONAL HOCKEY LEAGUE	14%	20%
NBA	12%	20%
PROFESSIONAL GOLF	12%	18%
EXTREME SPORTS LIKE ESPN'S X-GAMES	10%	11%
PROFESSIONAL TENNIS	3%	7%

Professional Sports: Attendance a

<i>Have you attended <u>any of the following in person/watched on TV</u> during the past year or so? (Percent "Yes" for each)</i>	Guard Members	NASCAR Fans
NFL FOOTBALL GAME	28%/87%	33%/95%
MAJOR LEAGUE BASEBALL GAME	34%/64%	47%/79%
NASCAR OR OTHER PROFESSIONAL MOTORSPORTS	16%/52%	34%/98%
LOCAL PRO SPORTS SUCH AS MINOR LEAGUE BASEBALL/ HOCKEY, ARENA FOOTBALL, OR SHORT-TRACK RACING	45%/36%	42%/40%
NATIONAL HOCKEY LEAGUE GAME	13%/35%	23%/54%
NBA GAME	13%/42%	19%/60%
PROFESSIONAL GOLF TOURNAMENT	6%/40%	9%/59%
EXTREME SPORTS LIKE ESPN'S X-GAMES	3%/35%	3%/43%
PROFESSIONAL TENNIS	1%/19%	3%/35%

Perception of Professional Sports

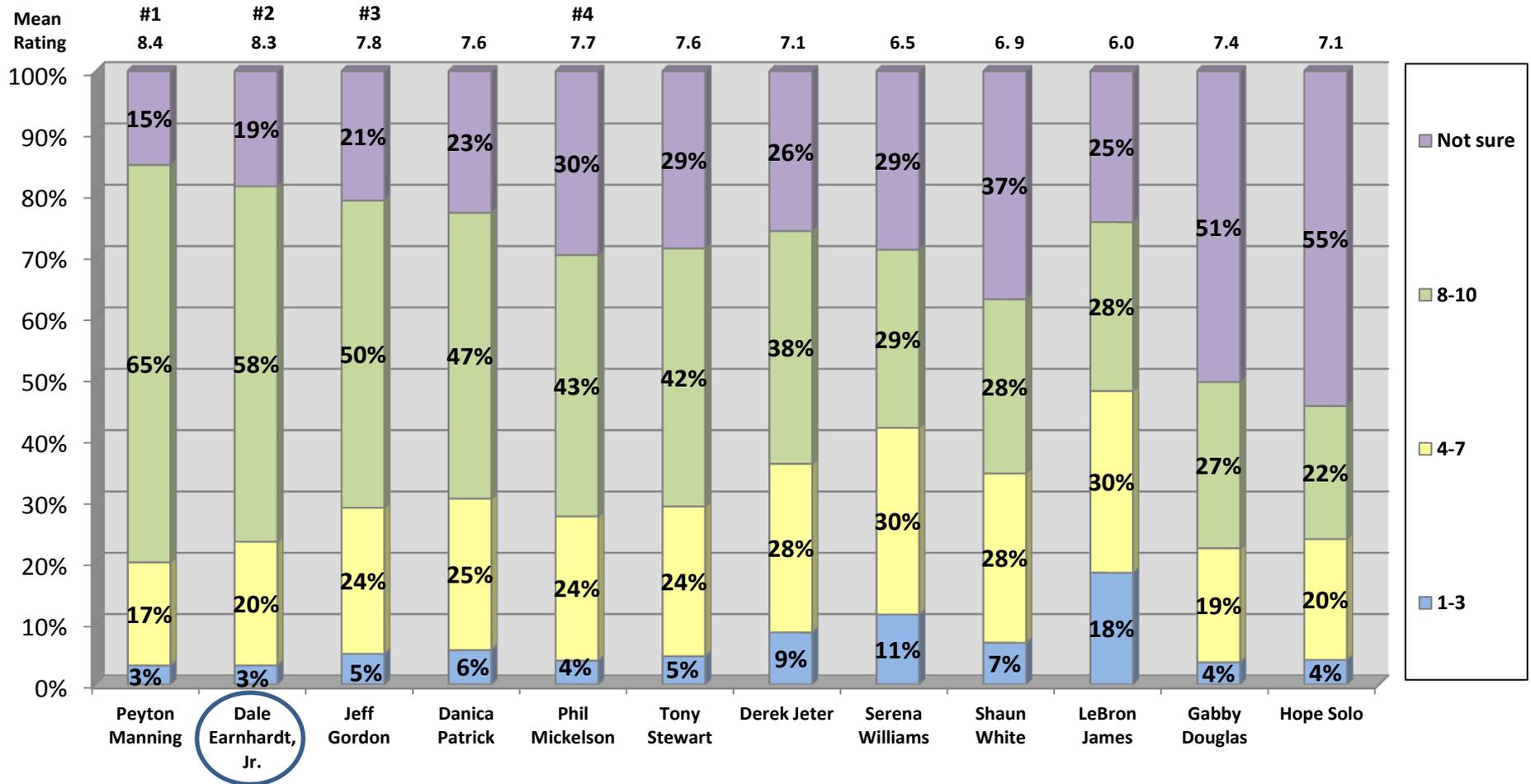
<i>To what degree* do you consider each of the following organizations to be <u>patriotic/supportive of the U.S. military</u>**</i>	Guard Members	Consumers	NASCAR Fans
NFL	8.2/8.4	7.9	8.5
MAJOR LEAGUE BASEBALL	8.3/8.3	8.2	8.6
NASCAR	8.6/8.9	7.5	9.2
NATIONAL HOCKEY LEAGUE	6.7/7.0	6.8	7.1
NBA	6.0/6.3	6.8	6.8
PGA	5.7/6.2	6.3	6.6

74%
ratings
of 8-10

87%
ratings
of 8-10

*Mean rating, using a scale of 1-10 where 1 means *not at all patriotic* and 10 means *very patriotic*.

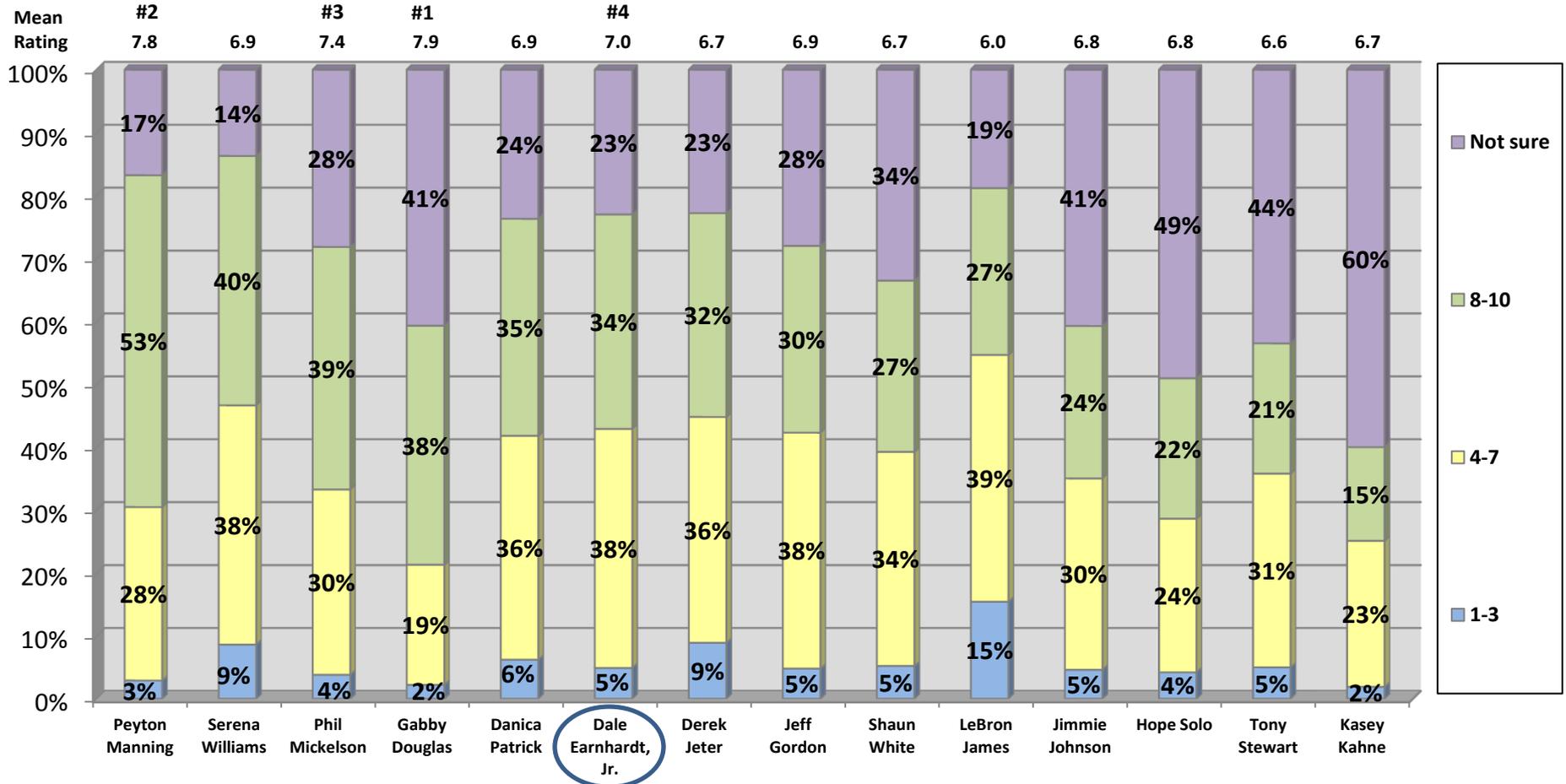
**"Supportive of the U.S. military" asked only in the National Guard survey.



In general, what is your feeling about each of the following individuals involved in professional sports?
National Guard survey respondents

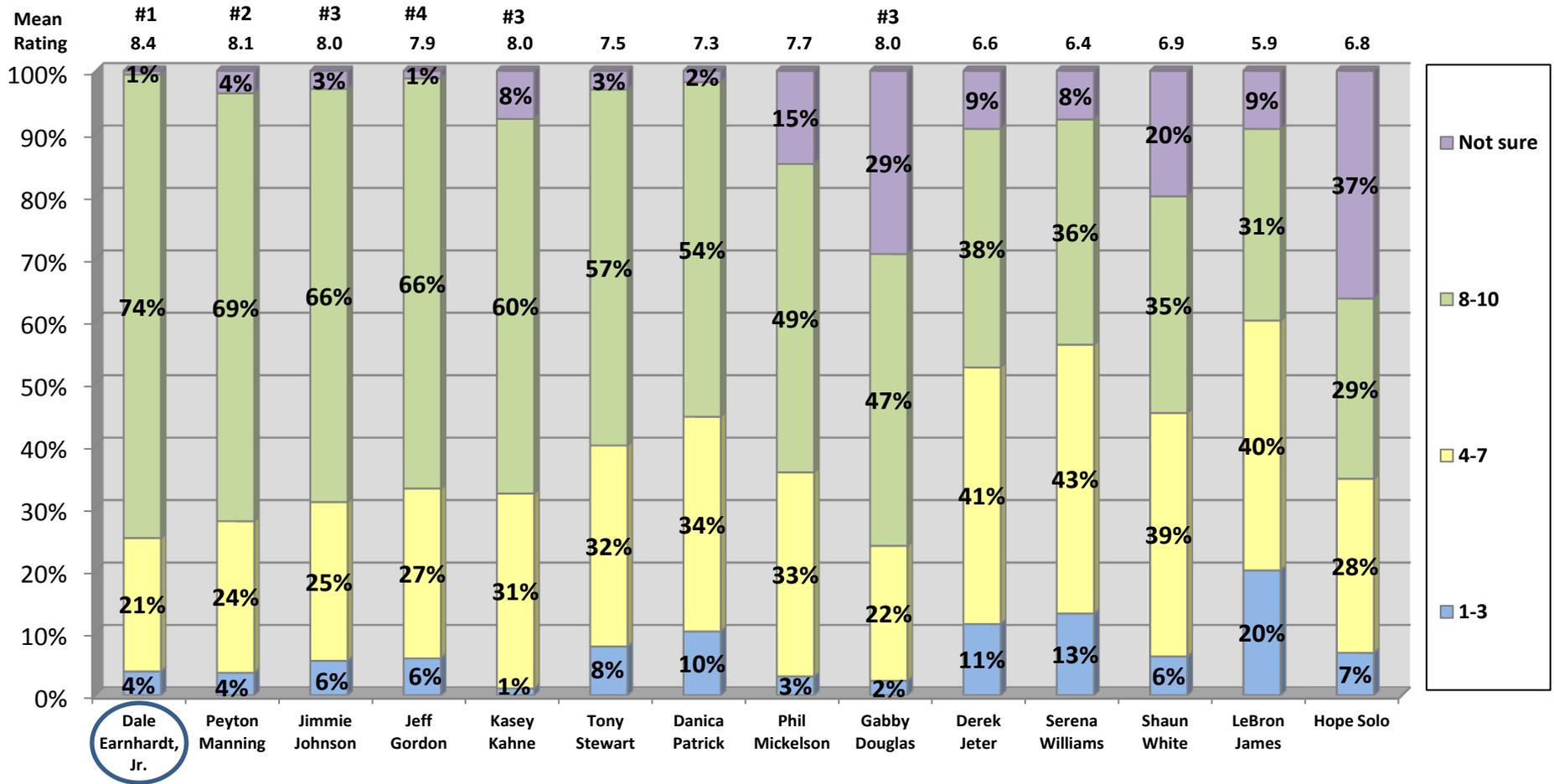
Distribution of ratings, using a scale of 1-10 where 1 means very negative and 10 means very positive
 Mean ratings exclude responses of "Not Sure"

Perception of Individual Athletes:



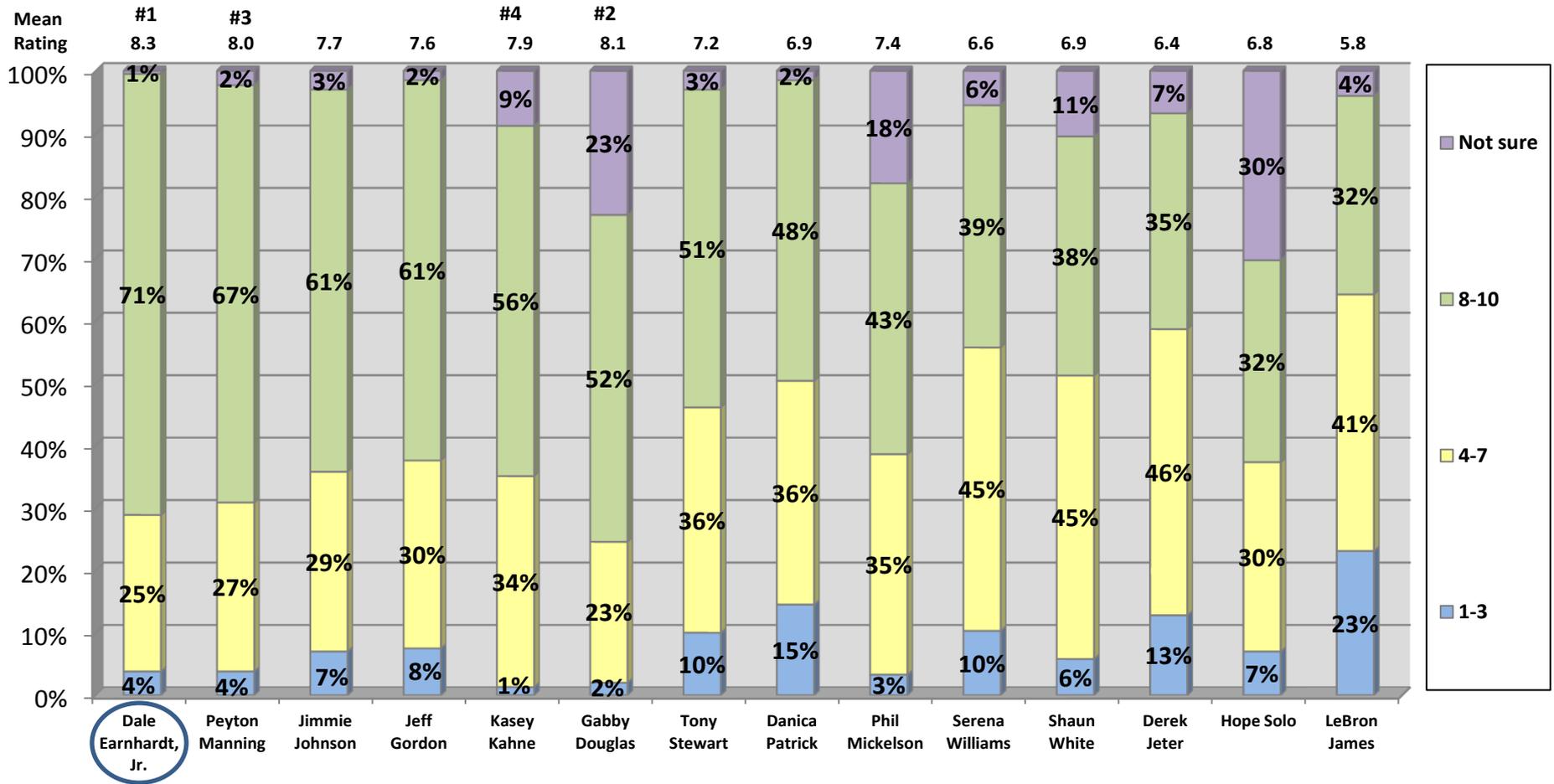
In general, what is your feeling about each of the following individuals involved in professional sports?
 Consumer survey respondents

Distribution of ratings, using a scale of 1-10 where 1 means very negative and 10 means very positive



In general, what is your feeling about each of the following individuals involved in professional sports?
NASCAR Fan respondents

Distribution of ratings, using a scale of 1-10 where 1 means very negative and 10 means very positive



In general, what is your feeling about each of the following individuals involved in professional sports?
NASCAR Fan respondents (Age 18-34)

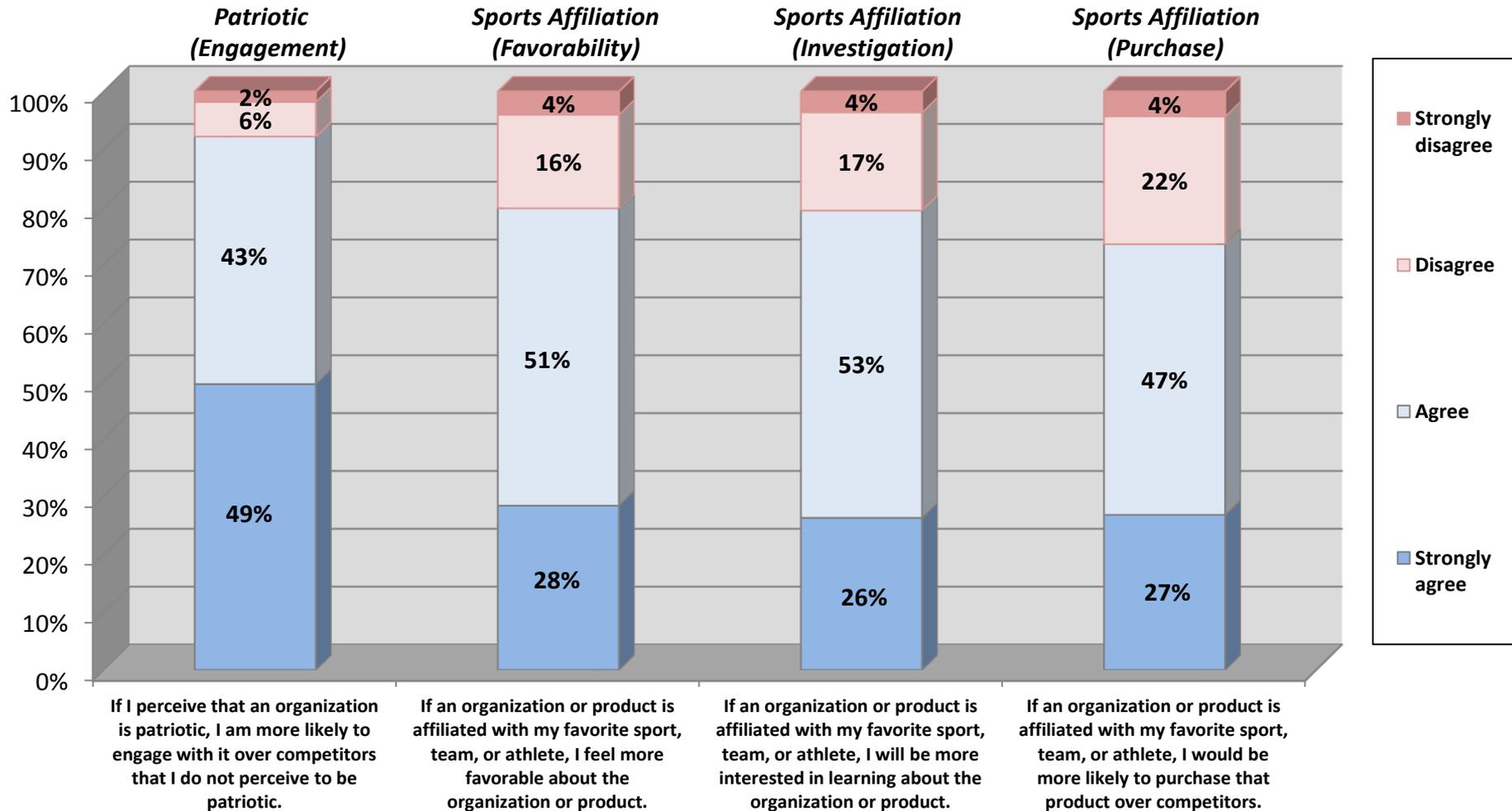
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PROFESSIONAL SPORTS AFFILIATIONS AND SPONSORSHIPS



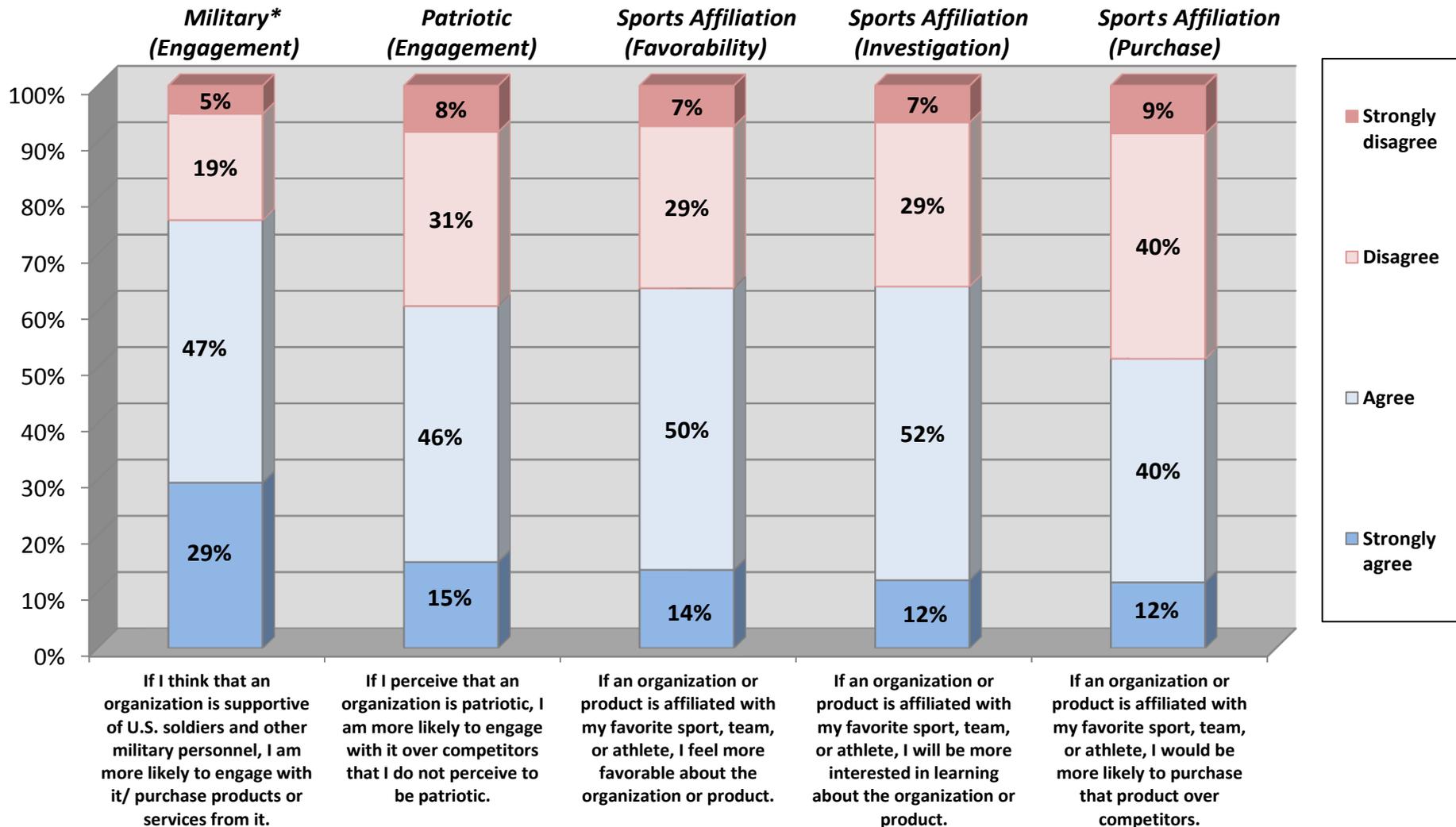
Organizations:

Perceptions and Engagement with National Guard Respondents



**How much do you agree or disagree with each of the following statements?
National Guard survey respondents**

Perceptions and Engagement with Patriotic/Sports-Affiliated Organizations: Consumer Respondents

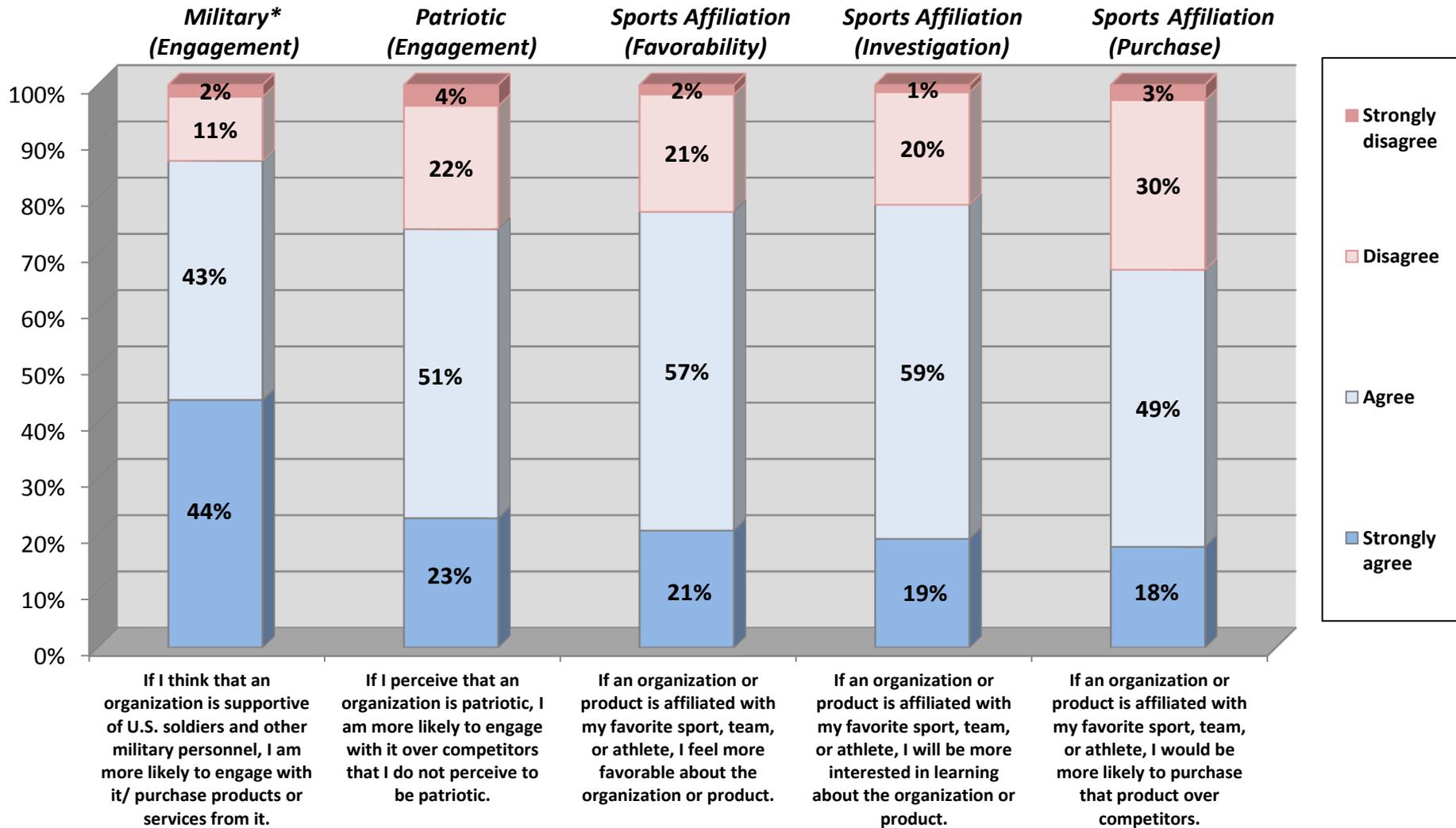


**How much do you agree or disagree with each of the following statements?
Consumer survey respondents**

*Question not asked in National Guard survey

Perceptions and Engagement with NASCAR Fan Respondents

Organizations:

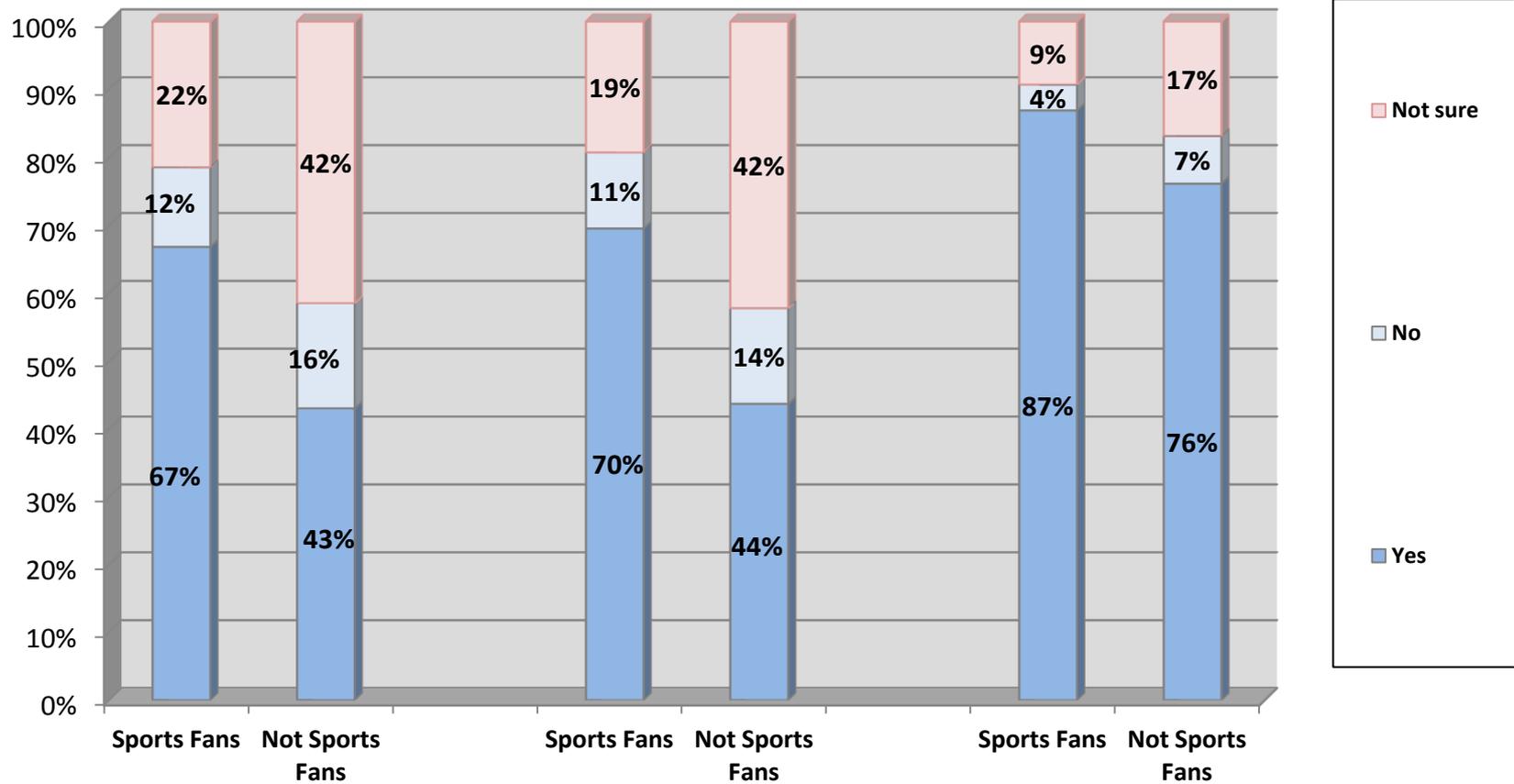


How much do you agree or disagree with each of the following statements?

NASCAR Fan respondents

*Question not asked in National Guard survey

Consumer Perceptions of Sponsorships and Recruitment: Sports Fans vs. Non-Fans*



Do you feel that marketing and sponsorships around professional sports could be an effective way to promote career opportunities in the U.S. military?

Do you feel that fans of professional sports represent a reasonable target audience for information regarding career opportunities in the U.S. military?

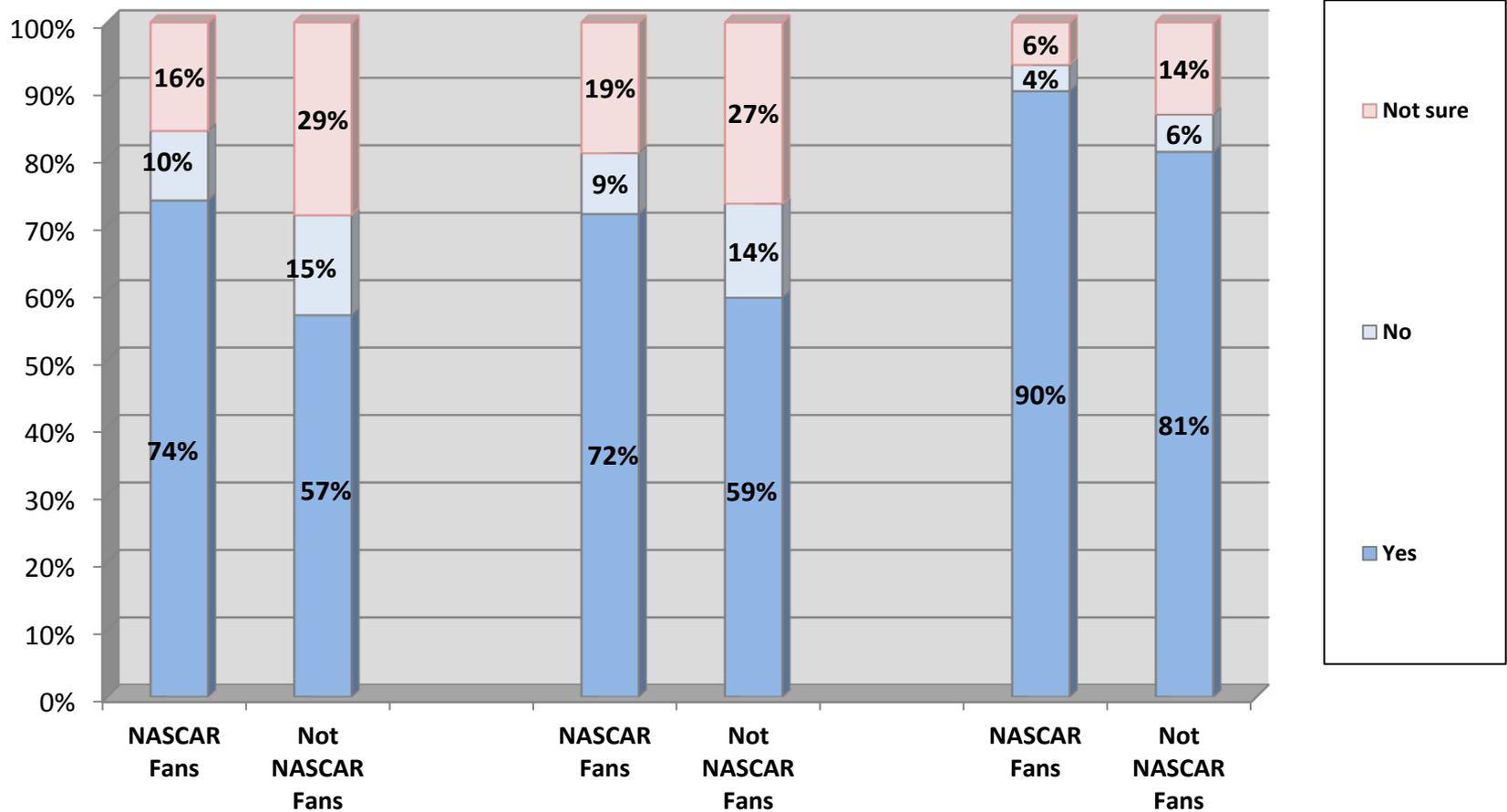
Should the U.S. military be able to promote its career opportunities where it believes it will find a receptive audience?

*Sports Fans: 'Very interested' in at least one of the professional sports measured in the survey (n=794)

Non-Fans: 'Not interested' in ALL of the professional sports measured in the survey (n=142)

Question not asked in National Guard survey.

Consumer Perceptions of Sponsorships and Recruitment: Sports Fans vs. Non-Fans*



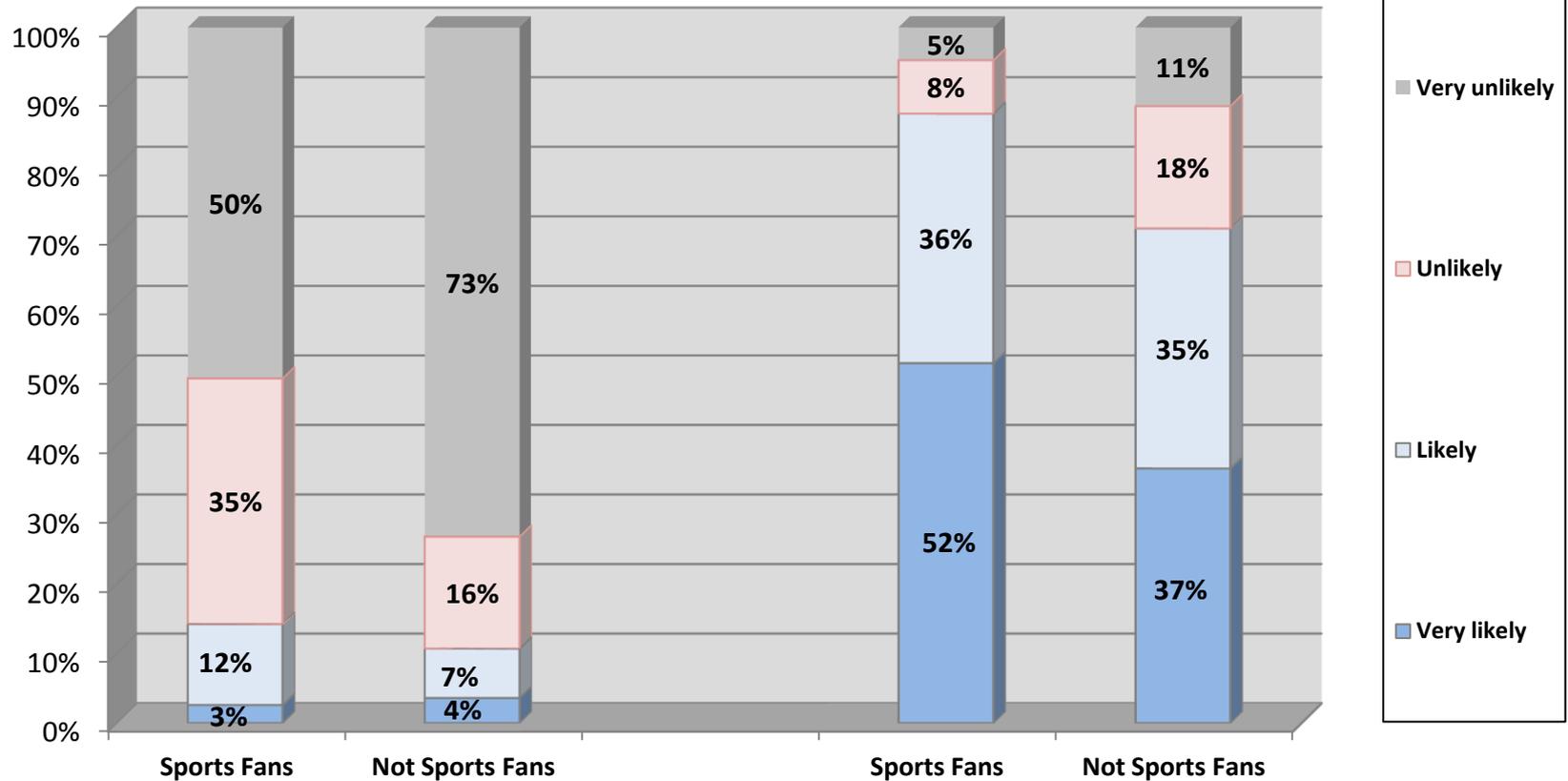
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Do you feel that fans of professional sports represent a reasonable target audience for information regarding career opportunities in the U.S. military?

Should the U.S. military be able to promote its career opportunities where it believes it will find a receptive audience?

*NASCAR Fans: Avid or Moderate fan of NASCAR (n=901)
 Non-Fans: 'Not a fan' of NASCAR (n=839)
 Question not asked in National Guard survey.

Military as a Career: Sports Fans vs. Non-Fans*

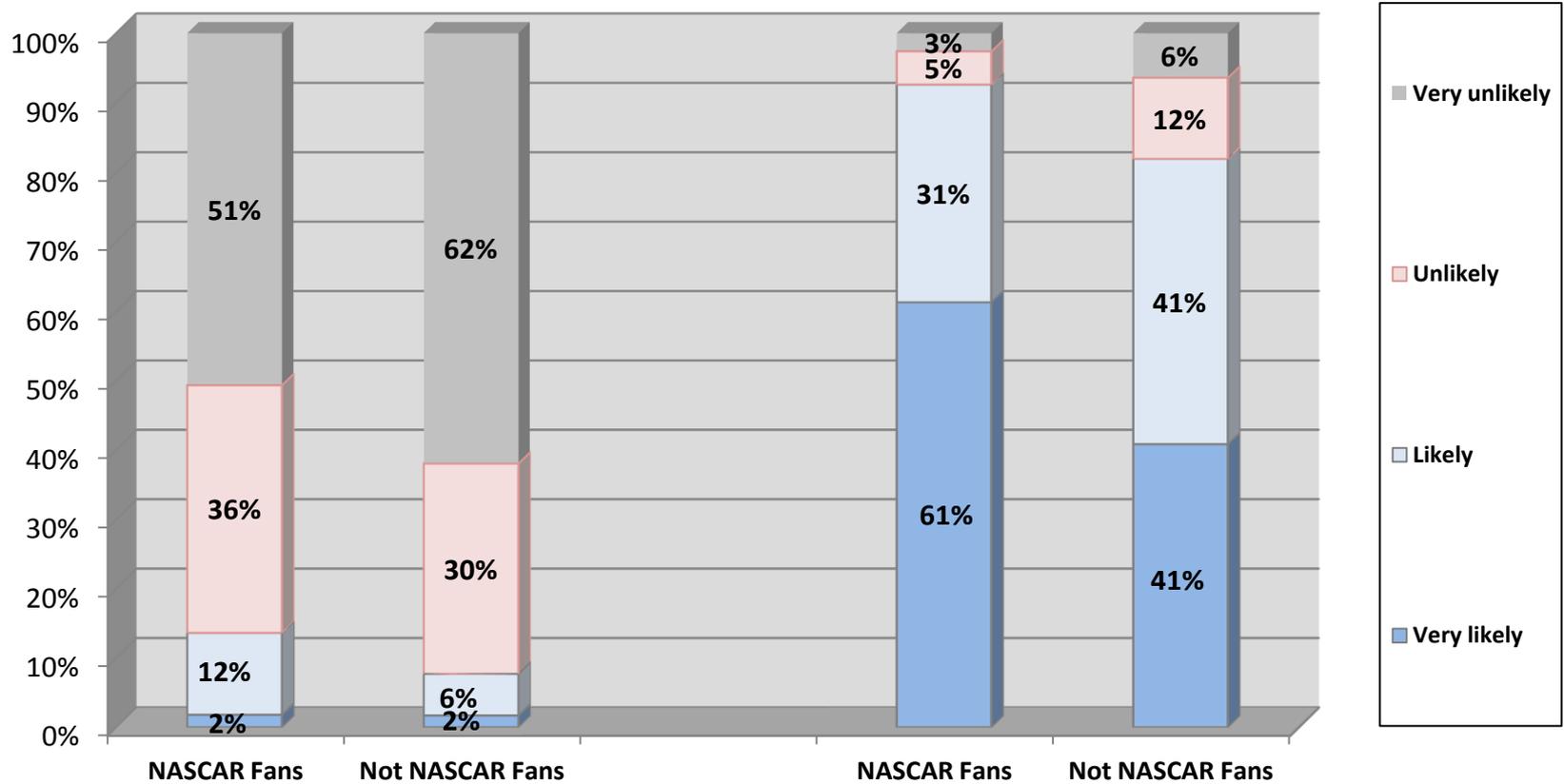


*How likely would you be to consider the U.S. military as a career option?
(Respondents age 18-34 who are not currently in the military)*

*If a friend or family member were to choose the U.S. military as a career option, how likely are you to be supportive of that choice?
(All respondents)*

*Sports Fans: 'Very interested' in at least one of the professional sports measured in the survey (n=794)
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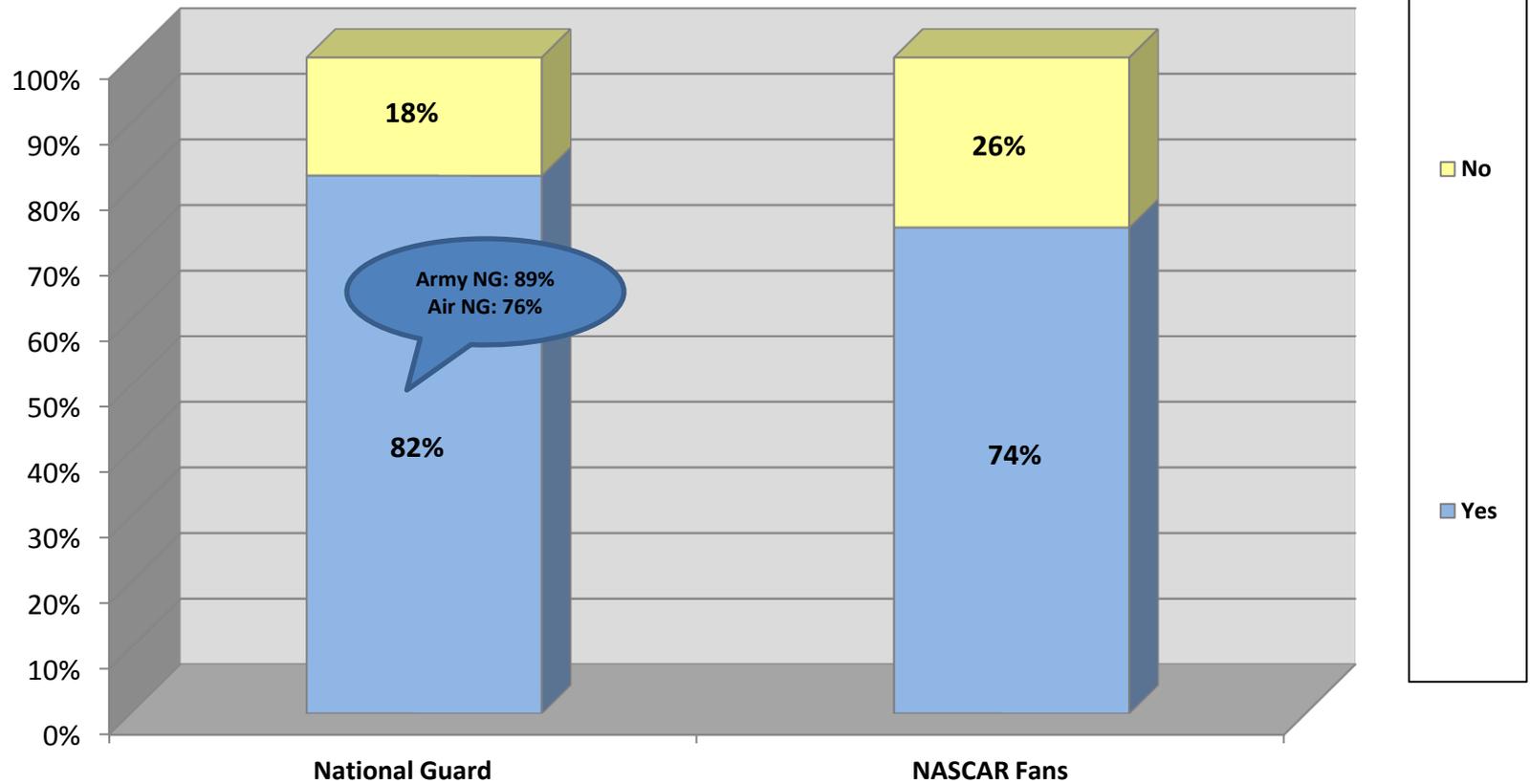
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NATIONAL GUARD SPONSORSHIP OF THE 88 TEAM

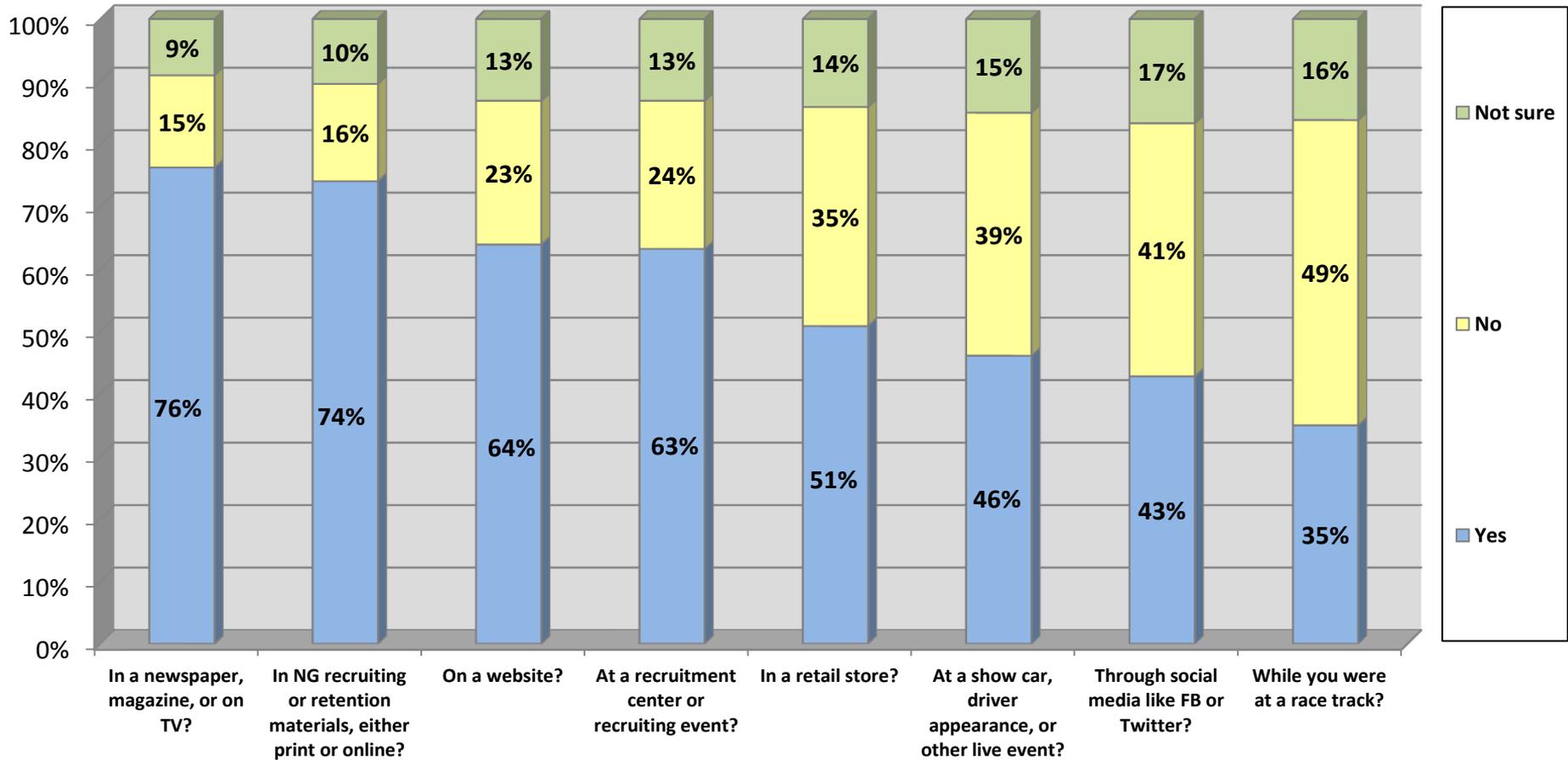


Awareness of National Guard/88 T



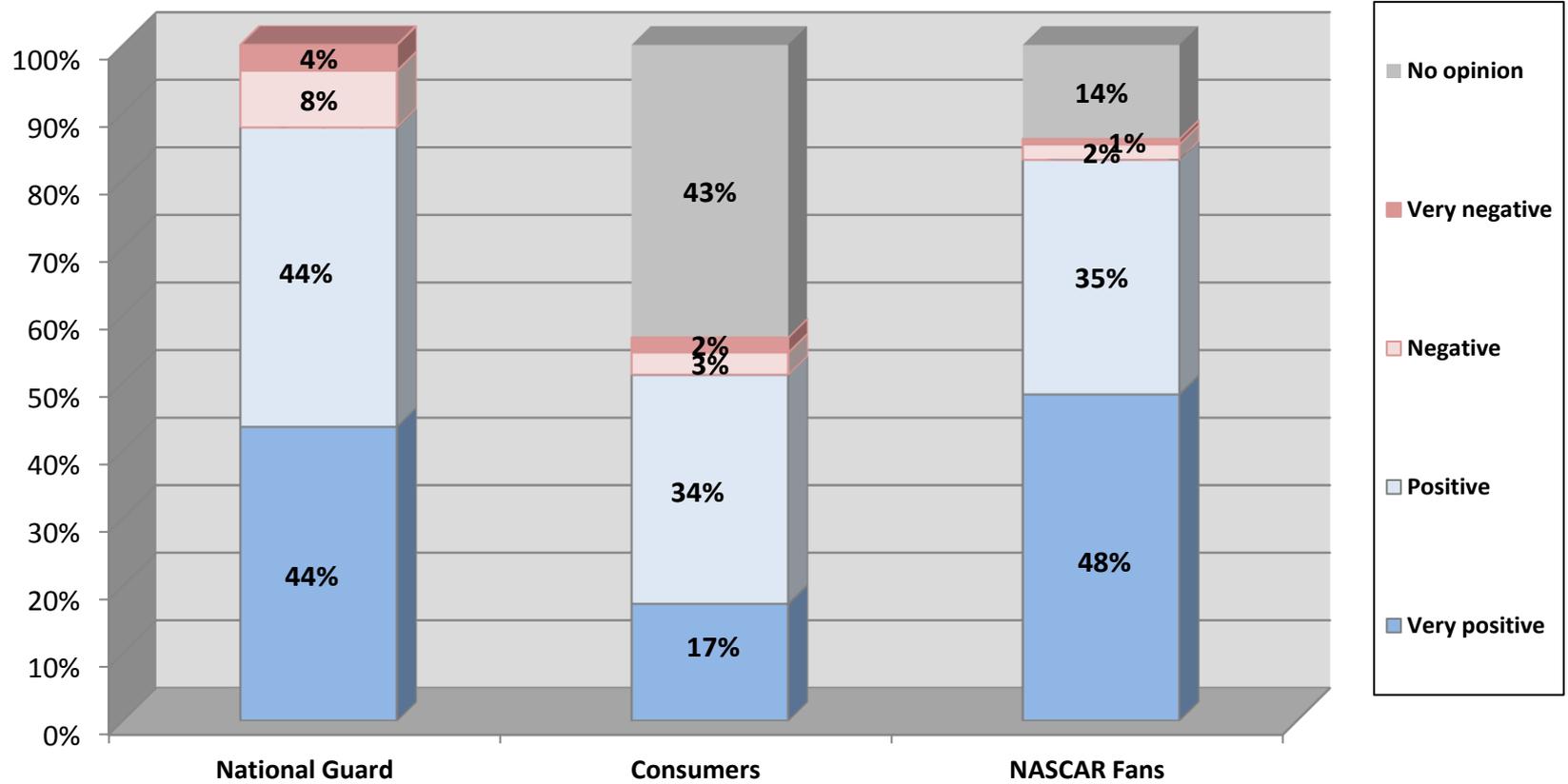
Did you know that the National Guard is a sponsor of NASCAR driver Dale Earnhardt, Jr.?

National Guard Member Awareness of 88 Team P Material



***Have you ever seen the National Guard logo on a race car, driver apparel, or other themed merchandise...
National Guard survey respondents****

Opinion of National Guard/88 Tea



What is your feeling about the affiliation of the National Guard with Dale Earnhardt, Jr. and NASCAR?
All respondents

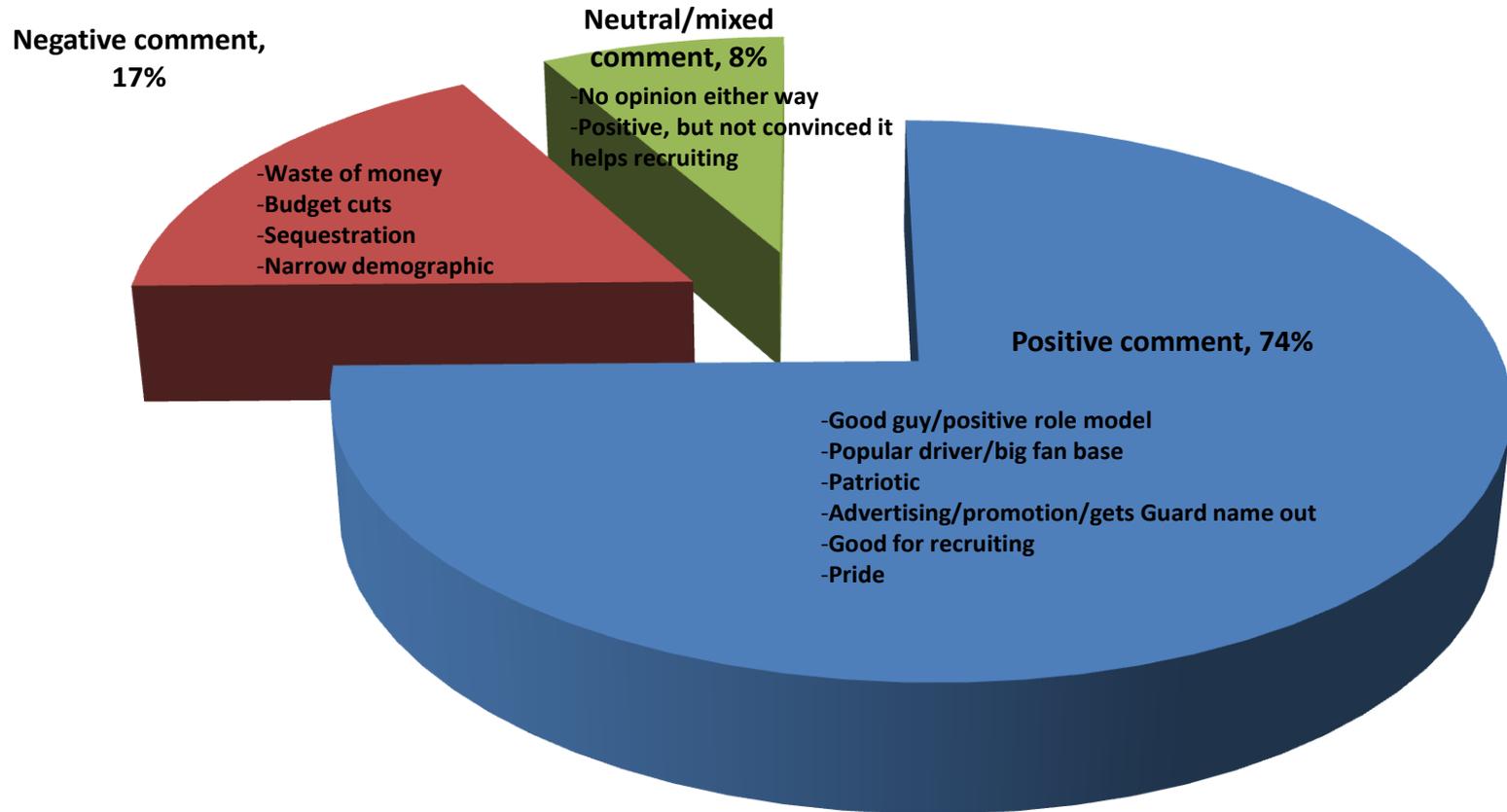
Positive Opinions of National Guard Sponsorship: Consumer Respondent Comments

- **(Recruiting)** I think this is a good place to advertise the National Guard. The audience would be more receptive at a NASCAR event than other professional sporting events.
- **(Good Reputation)** I feel that NASCAR is a very family-friendly organization, I believe that the US military, including the National Guard, is a positive force in our country, and I believe the matchup between those two organizations is good. Dale has a good reputation, and I hope that potential service members will see his sponsorship and react positively from it.
- **(Patriotic)** As a non-fan of NASCAR, I personally would be more supportive of (driver) because I would like the military affiliated car to perform well regardless of who drives it.
- **(Patriotic)** Prior to this survey, I had no idea that Earnhardt was sponsored by the National Guard. After learning this, I think it is a good thing. I like the fact that pro sports are supportive of the military, and that the military supports pro sports.
- **(Role Model)** I find Dale Earnhardt, Jr. to be very good role model for his followers and the National Guard is doing a positive thing by sponsoring him.
- **(Good Representation)** Dale Earnhardt, Jr. is the most popular driver in NASCAR. He wins that title every year. He has a very large fan base (probably the largest). What ever is on that car people will notice. Whatever Dale promotes or takes about during an interview people listen and will talk about it. I know he is a strong supporter of our armed forces and proud to carry the National Guard colors on his #88 Hendrick Chevy.
- **(Promotion)** It gives National Guard a more public face, giving the average American the opportunity to connect with it.
- **(Good Fit)** It goes two ways. 1) It shows that the US Military at least has a notion of popular leisure activities in the country, which allows it to target specific audiences for specific job types. 2) It shows the American people that the US Military has an interest in their activities.

Positive Opinions of National Guard Sponsorship: Consumer Respondent Comments

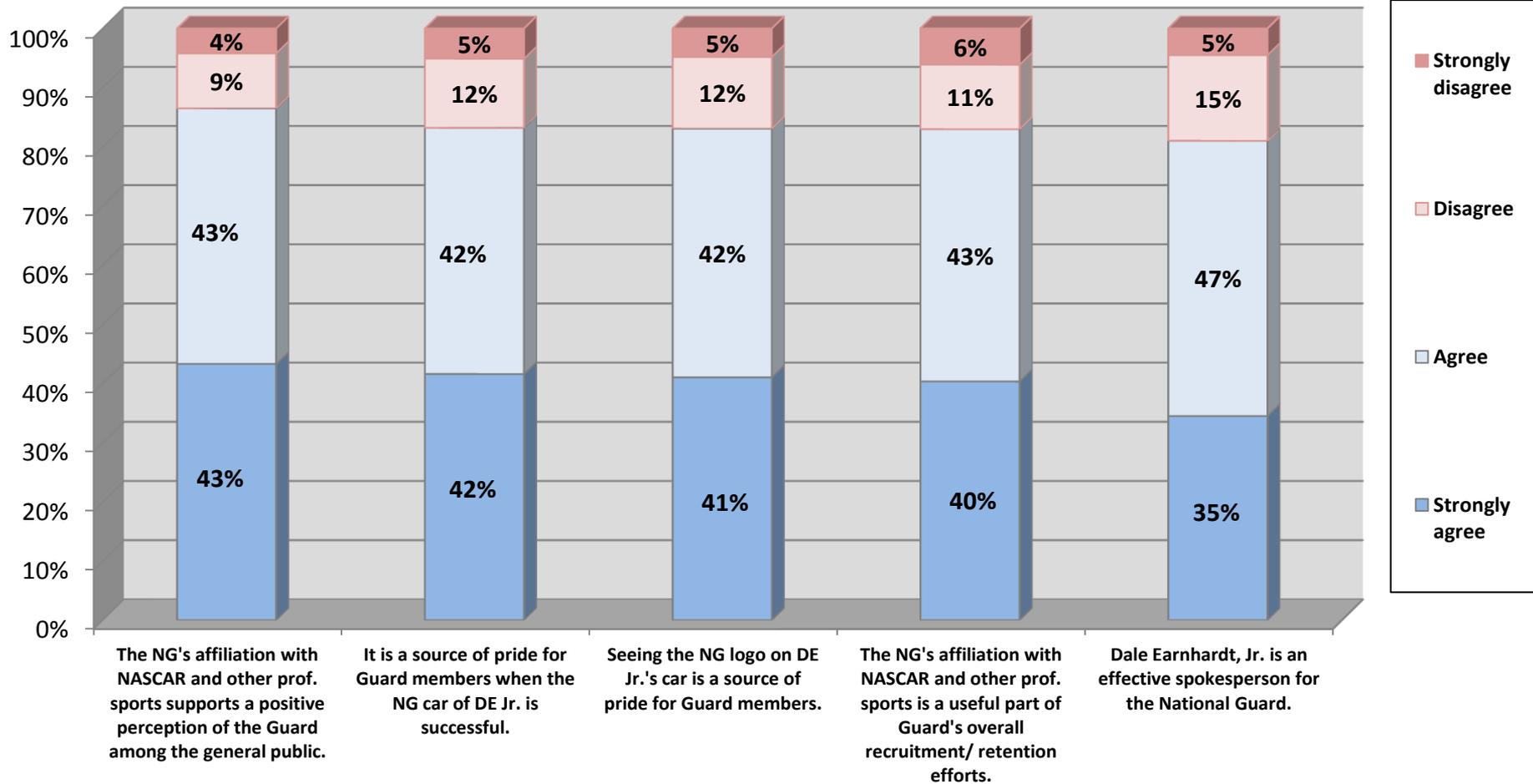
- **(Image)** It is a way to get the positive image out for what we do and help recruiting. When a major sporting event is broadcast with the guard represented the media also feels inclined to keep the fans interested in supporting our mission. The fans of that sport may not necessarily watch news, per say, but will follow that broadcast, therefore gaining that positive perspective on what we are about. Dale Jr. is very supportive of the service and is a good conduit in this.
- **(Supportive of National Guard)** Earnhardt will bend over backwards to please the Guardsman who attend NASCAR events. He has always appeared humble and seems to like the Guard. NASCAR has a large fan base with great national exposure.
- **(Publicity)** Great publicity for the Guard, especially with the regular Army dropping sponsorship of Ryan Newman. NASCAR fans are patriotic and an excellent recruiting pool.
- **(Patriotic)** He has a big fan base with the military. He seems to me that he has more of a patriotic spirit than many other athletes. It seems that the only athletes these days who are patriotic are in the Olympics.
- **(Recruiting)** We use this type advertising for public affairs/recruiting. If we can't get a sportsman who was a veteran, then it is important to have someone that is a 'leader' in sports. To effectively recruit you have to win the parent(s) over with leadership characteristics. To be effective in recruiting today, you need to 'recruit' the parent(s), Not just a well known name. I say this as I was a Recruiting and Retention Program Manager and developed successful recruiting and retention plans.
- **(Role Model)** NASCAR has a very loyal following, mostly Southerners, that believe in freedom, the Constitution and the United States. I am not a NASCAR fan, nor am I a Southerner (New Englander), but Junior is a positive role model for young boys and girls. I cannot recall an instance where I've heard something on a sports show that portrayed him in a negative light. When sponsoring sports and individuals, it is important to choose ones that can be good role models for our youth and contribute to the community. Yes, these are businesses and business men, but they will be representing the citizen-Airmen and citizen-Soldiers of the USA.
- **(Good Representation)** He is a patriotic, well rounded individual who has a way of connecting with the public. He is a great representative of the National Guard, I think he has a lot of the same qualities that we look for in soldiers, he is humble, grateful, down to earth and respectful.

Why do you feel (positive/negative) about the National Guard's sponsorship of Dale Earnhardt, Jr.'s NASCAR race team? (National Guard respondents)



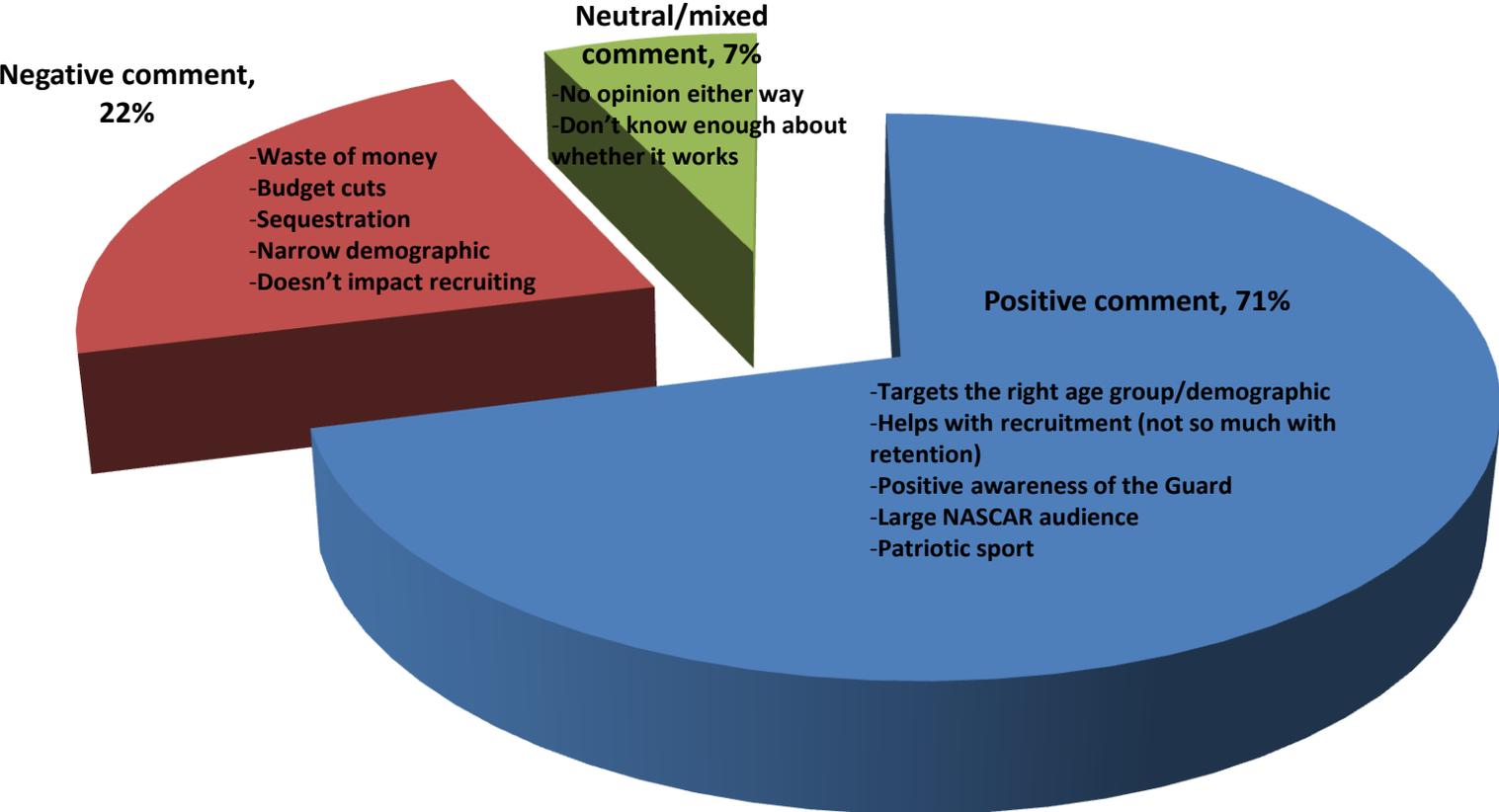
Feelings about the National Guard's sponsorship of Dale Earnhardt, Jr.'s race team
National Guard survey respondents: Categorization of 1,170 open-ended question responses

National Guard Member Perceptions of 88 Team Affiliation



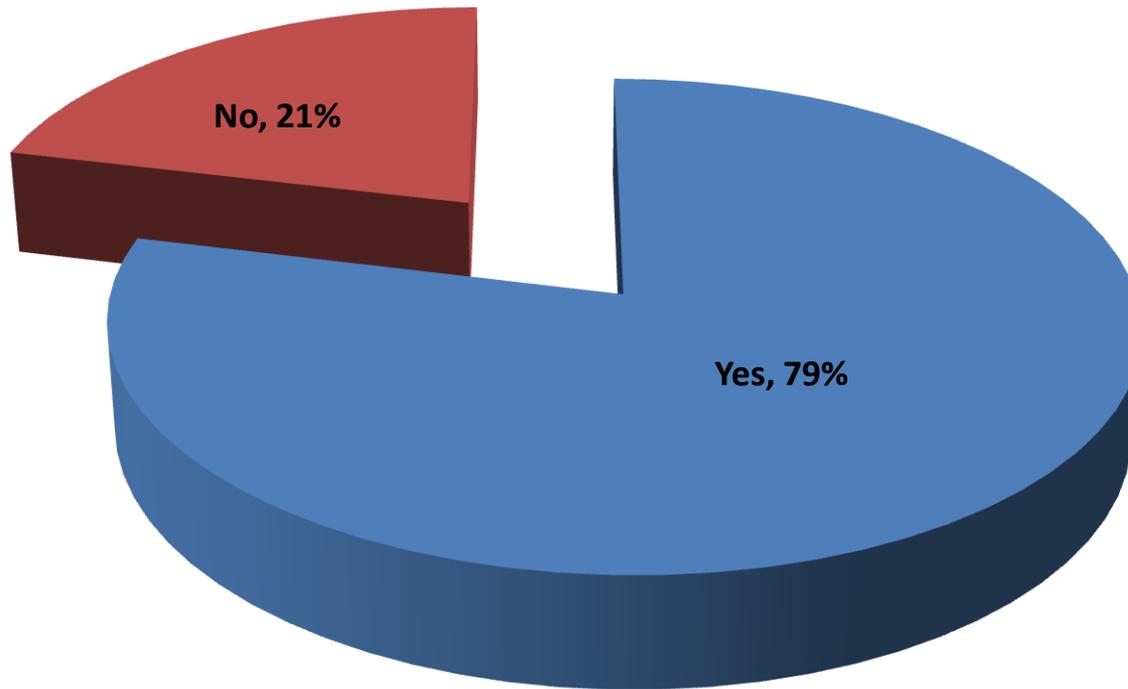
**How much do you agree or disagree with each of the following statements?
National Guard survey respondents***

Why do you (agree/disagree) that the National Guard sponsorship of Dale Earnhardt, Jr.'s NASCAR race team is a useful part of recruitment and retention efforts? (National Guard respondents)



Feelings about the 88 team sponsorship's impact on recruitment
National Guard survey respondents: Categorization of 1,046 open-ended question responses

National Guard Perceptions of Sponsorship and Recruitment



If you knew that the leadership at National Guard Bureau had determined that sponsorship of professional sports was an effective use of its marketing budget, would you be supportive of NGB continuing to allocate a portion of its recruiting and retention budget towards these sponsorships?

National Guard survey respondents*

Conclusions

- **Nearly three-fourths of Guard members surveyed perceive NASCAR to be *patriotic*, higher than any other sport. Even among non-fans, over half (53%) of National Guard respondents rate NASCAR as *patriotic*.**
- **Dale Earnhardt, Jr. is perceived very favorably among most National Guard respondents, second only to Peyton Manning on a list of fourteen athletes across multiple professional sports. He is the highest-rated athlete on the same list among NASCAR fans.**
- **Consumer favorability regarding Dale Earnhardt, Jr. and the association with the National Guard is largely favorable; very few are unfavorable, and 40% or more have no strong opinion. NASCAR fans view the association very favorably, with over 80% describing it as positive or very positive.**
- **Among National Guard members, strong positive feeling about the Guard's affiliation with the 88 team is highly correlated with affinity for NASCAR; however, even among non-fans, two-thirds or more NG respondents express favorable opinions about the association.**
- **Respondents in both consumer segments (especially NASCAR fans) express a high level of favorability towards organizations that are perceived to be supportive of U.S. soldiers and military personnel.**
- **Respondents in all three segments express positive views about the U.S. military using sports sponsorships to reach potential recruits, assuming the military has deemed this a fruitful use of those budget funds. Negative perceptions primarily involve concerns about appropriating funding in this direction when other areas have experienced budget cuts, lack of enthusiasm for NASCAR specifically, and lack of information regarding the specific benefits and impact upon recruiting.**
- **Among consumer respondents aged 18-34 who are not currently in the U.S. military, those who are NASCAR fans are significantly more likely to say they would consider the military as a career than those who are not NASCAR fans.**



Alan Newman Research
MARKET RESEARCH CONSULTANTS