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2008 NASCAR Brand Leaderboard

Exposure value nearly \$1.7 billion

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NASCAR sponsors received almost \$1.7 billion in exposure for their brands this year, according to the results of custom research for the recently concluded season.

For the second straight year, SportsBusiness Journal/Daily teamed with Kansas City-based sponsorship measurement firm Image Impact to measure the exposure received by companies doing business with NASCAR. This year, we captured and assessed more than 138,000 sponsor impressions, 44 percent more than last year's study, through NASCAR's 37-race Sprint Cup Series schedule, which includes the Sprint All-Star Race.

Nearly 600 sponsors were tracked. Primary and secondary car and driver partners were analyzed, along with all race venue signage, and the myriad graphics and audio mentions from the races' TV broadcasts. Six additional sponsored locations were measured this year, including exposure a sponsor may have received by having its logo on a trophy. Tertiary sponsors on driver and pit crew uniforms and on the quarter panels of the race cars were not reported.

Image Impact's proprietary software provided analysis of the video feeds from each race. Each race broadcast was broken down and evaluated for all brand detections that occurred on screen and were clear and in-focus for at least one full second. Each of those individual detections was then evaluated based on its duration, average size, location and relative isolation (or lack thereof) from competing brands: Was the logo a featured image on the screen or was it shown among other sponsors?

Nearly one-third of all monetary value calculated came via exposure on the on-screen leaderboard.

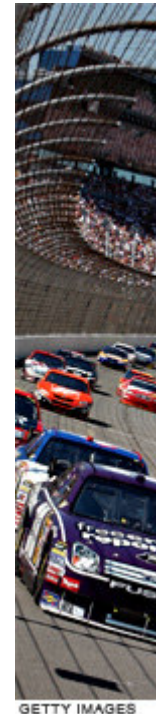
Because location and clarity significantly affected the measured value of each detection, quantity did not always translate into increased value. Also, for the purpose of summary calculations, each audio mention was assigned a duration of five seconds.

For example, Allstate's 702 detections generated \$32.9 million in exposure over the course of the season, putting Allstate No. 9 overall among the nearly 600 companies tracked. Home Depot, No. 10 overall, had almost three times as many detections, but because many of those detections were less prominently displayed, the company received \$29.6 million in value.

A monetary value for each sponsor detection was calculated based on a formula combining all these factors and the network-provided rate-card price of a 30-second spot for each specific race. Ad rates increased by an average of \$10,000 this season over 2007. Although most of the impressions did not come about as a result of a direct media buy, using rate-card prices creates a level playing field. For example, three companies have naming-rights deals at a track: Lowe's, Infineon and Auto Club of California. These companies received credit for brand exposure even if they did not necessarily sponsor a driver or telecast.

Among the findings:

■ In 12 of the 37 races tracked, the driver who delivered the most value for his sponsors was not the winner of the race.



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PROJECT SUMMARY

- One of every five dollars in exposure went to Sprint.
- AT&T, in its final year as a NASCAR sponsor, ranked No. 5 overall and more than doubled its exposure value.
- Kyle Busch's eight-win season helped M&M's, his primary sponsor, rise from No. 61 last year to No. 17 this season. The candy brand's exposure value increased fivefold, to \$22.3 million.

- Total detections measured: 138,152
- Avg. detections per race: 3,734
- No. of sponsors tracked: 594 companies/brands
- Total sponsor exposure time: 248 hours, 10 minutes, 35 seconds
- Total monetary value: \$1.69 billion
- Avg. exposure value for sponsors per race: \$45.69 million

Further results, including leaders by sponsor and driver, can be seen below and on the pages that follow.

DRIVER SNAPSHOT

Dale Earnhardt Jr.'s team change was one of NASCAR's top stories entering 2008. How did things turn out? For the year, Earnhardt generated \$26.15 million in value for Amp, the National Guard and Mountain Dew, his tri-primary sponsors. That's 5 percent more than what he delivered in 2007 for his former primary marketing partner, Budweiser. With Earnhardt's move, Budweiser put its support (and dollars) behind Kasey Kahne this season. It ended up with only \$11.75 million in exposure value, less than half what the beer brand got with Earnhardt in 2007. Helping the exposure for Earnhardt's backers this year was the fact that he had a better year on the track. In 2007, he finished 16th in the Sprint Cup standings, with no victories and seven top-5 finishes. This year, he finished 12th, won one race and had 10 top-5 finishes.



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Earnhardt delivered \$13.8M in exposure for Amp and \$10.5M for the National Guard.

Dale Earnhardt Jr.'s 2008 exposures

Brand	No. of detections	Duration (h:min:sec)	Value
Amp	2,045	36:53.7	\$13,806,501
National Guard	1,654	11:57.0	\$10,494,189
Mountain Dew	330	23:45.3	\$1,845,448

Budweiser's driver-based exposures

Placement	No. of detections	Duration (h:min:sec)	Value
2008: K. Kahne	1,522	59:41.7	\$11,749,224
2007: D. Earnhardt Jr.	2,826	51:35.0	\$24,845,048

TOP BRANDS

Ranked by monetary value

Rank (2007 rank)	Brand	Value (change from 2007)
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1 (1)	Sprint	\$340,528,414 (+39.6%)
2 (2)	Chevrolet	\$126,602,001 (-30.2%)
3 (5)	Toyota	\$73,713,370 (+61.6%)
4 (3)	Ford	\$73,488,688 (+10.3%)
5 (9)	AT&T	\$63,507,454 (+113.3%)



Ranked by total detections

Rank (2007 rank)	Brand	No. of detections (change from 2007)
1 (1)	Chevrolet	14,379 (-8.4%)
2 (2)	Sprint	9,570 (+51.5%)
3 (3)	Lowe's	7,720 (+50.5%)
4 (10)	Toyota	4,285 (+136.2%)
5 (40)	M&M's	4,106 (+610.4%)



Ranked by total duration

Rank (2007 rank)	Brand	Duration (h:min:sec) (change from 2007)
1 (1)	Sprint	46:23:47 (+15 hours, 22 min.)
2 (2)	Chevrolet	18:37:23 (-5 hours, 35 min.)
3 (5)	Lowe's	09:25:44 (+2 hours, 50 min.)
4 (7)	Toyota	08:29:12 (+8 hours, 16 min.)
5 (3)	Ford	08:05:01 (+56 min.)



ON THE CAR

HOOD

Total detections: 34,427
 Avg. duration per detection: 3.46 seconds
 Total value (% of overall): \$141.6 million (8.4%)

Rank	Brand	Value
1	Chevrolet	\$23,932,224
2	Lowe's	\$12,178,930
3	M&M's	\$11,072,113
4	3M	\$5,126,982
5	AAA	\$3,948,618

2007 leader: Chevrolet (\$28,994,570)

FRONT ON-BOARD CAMERA

Total detections: 2,531
 Avg. duration per detection: 7.02 seconds
 Total value (% of overall): \$52.2 million (3.1%)

Rank	Brand	Value
1	AT&T	\$7,451,861
2	Ford	\$4,394,151
3	Home Depot	\$4,260,839
4	Budweiser	\$3,241,431
5	DuPont	\$2,464,381

Comparable information for 2007 not available



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Chevy's hood placement value nearly doubled No. 2 Lowe's.

OTHER INTERIOR

Total detections: 3,351
 Avg. duration per detection: 10.76 seconds
 Total value (% of overall): \$43.0 million (2.5%)

Rank	Brand	Value
1	AT&T	\$5,640,048
2	Lowe's	\$3,164,036
3	Office Depot	\$2,992,519
4	Amp	\$2,926,537
5	Ford	\$2,764,348

2007 leader: Budweiser (\$3,456,478)

REAR QUARTER PANEL

Total detections: 17,716
 Avg. duration per detection: 3.64 seconds
 Total value (% of overall): \$70.9 million (4.2%)

Rank	Brand	Value
1	Lowe's	\$5,193,248
2	Quaker State	\$3,763,198
3	M&M's	\$3,526,953
4	Red Bull	\$3,460,809
5	AT&T	\$2,883,630

2007 leader: Lowe's (\$4,720,060)

BACK PANEL/BUMPER

Total detections: 8,847
 Avg. duration per detection: 3.33 seconds
 Total value (% of overall): \$31.7 million (1.9%)

Rank	Brand	Value
1	Chevrolet	\$8,566,170
2	Lowe's	\$2,160,045
3	Ford	\$1,994,359
4	Dodge Charger	\$1,337,667
5	Amp	\$924,234

2007 leader: Chevrolet (\$12,713,573)

ON THE DRIVER**UNIFORM FRONT**

Total detections: 7,139
 Avg. duration per detection: 6.03 seconds
 Total value (% of overall): \$46.7 million (2.8%)

Rank	Brand	Value
1	Sprint	\$7,224,101
2	Chevrolet	\$3,774,927
3	Toyota	\$2,178,413
4	Quaker State	\$1,762,513
5	Dish Network	\$1,682,871

2007 leader: Nextel (\$6,221,596)

WITH THE PIT CREW**SIGNAGE**

Total detections: 3,515
 Avg. duration per detection: 4.96 seconds
 Total value (% of overall): \$21.1 million (1.2%)

Rank	Brand	Value
1	Target	\$2,360,499
2	Lowe's	\$1,606,924
3	Red Bull	\$1,364,998
4	AT&T	\$1,262,320
5	M&M's	\$1,108,847

2007 leader: Target (\$1,629,438)

UNIFORM COLLAR

Total detections: 851
 Avg. duration per detection: 7.60 seconds
 Total value (% of overall): \$6.6 million (0.4%)

Rank	Brand	Value
1	Lowe's	\$991,557
2	DuPont	\$664,346
3	Office Depot	\$614,766
4	Amp	\$432,110
5	FedEx	\$377,231

2007 leader: DuPont (\$978,293)

UNIFORM BACK

Total detections: 2,378
 Avg. duration per detection: 3.64 seconds
 Total value (% of overall): \$10.7 million (0.6%)

Rank	Brand	Value
1	M&M's	\$1,010,250
2	Lowe's	\$871,093
3	3M	\$755,941
4	AT&T	\$737,066
5	FedEx	\$636,711

2007 leader: Lowe's (\$1,115,198)

HAT/HELMET

Total detections: 760
 Avg. duration per detection: 7.30 seconds
 Total value (% of overall): \$6.1 million (0.4%)

Rank	Brand	Value
1	AT&T	\$622,945
2	Office Depot	\$590,399
3	Lowe's	\$410,927
4	Shell Gas	\$363,609
5	DuPont	\$316,700

2007 leader: Shell Gas (\$551,675)

UNIFORM FRONT

Total detections: 1,793
 Avg. duration per detection: 5.05 seconds
 Total value (% of overall): \$9.9 million (0.6%)

Rank	Brand	Value
1	Sprint	\$912,605
2	Quaker State	\$822,897
3	Chevrolet	\$703,417
4	Kobalt Tools	\$522,244
5	Dish Network	\$500,565

2007 leader: Chevrolet (\$604,647)

BY INDUSTRY SEGMENT

Brand	No. of detections	Duration (h:min:sec)	Value
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AUTO

Ford Fusion*	2,322	09:56.3	\$9,054,613
Chevrolet Impala*	1,743	42:46.3	\$7,298,669
Dodge Charger*	1,162	10:30.0	\$4,366,605
Toyota Camry*	692	39:08.7	\$2,796,435

Note: Impala was No. 1 last year, with 1,115 detections worth \$6.0 million.

BEER

Budweiser	1,706	54:16.3	\$36,580,560
Miller Lite	1,343	21:26.7	\$10,588,993
Coors Light*	136	58:47.0	\$7,118,182

Note: Budweiser was No. 1 last year, with 3,024 detections worth \$45.5 million. Budweiser had been NASCAR's official beer since 1987 before ending that relationship prior to this season. The value of Coors Light's exposure, meanwhile, was nearly triple that of last season. The 2008 season marked Coors Light's first year as NASCAR's official beer.

ENERGY DRINK

Amp	2,384	30:07.0	\$25,844,083
Red Bull	2,143	20:25.0	\$11,100,792

Note: Red Bull was No. 1 last season, delivering \$4.7 million in exposure via 582 detections. Amp was mentioned only four times in 2007, generating \$60,000 in value.

HOME IMP.

Lowe's	7,720	25:43.7	\$49,568,850
Home Depot*	2,036	22:44.3	\$29,594,600

Note: Lowe's was No. 1 last year, with 5,131 detections worth \$42.6 million.

QSR

Subway	640	26:46.0	\$28,371,904
McDonald's	571	43:25.3	\$11,821,289

Note: Subway was No. 1 last year as well, with 547 detections worth \$22.2 million. Domino's Pizza, the official pizza of NASCAR, had 10 detections this year valued at \$775,111.

SODA

Coca-Cola*	919	17:08.7	\$18,807,290
Pepsi	1,806	24:37.7	\$14,911,355
Coke Zero	428	02:31.0	\$14,172,697

Note: Coca-Cola repeats as No. 1, with more detections this year than in 2007 but comparable value: 494 detections worth \$18.6 million last year.

INSURANCE

Allstate	702	54:35.3	\$32,854,950
State Farm	122	58:11.0	\$11,914,311
Aflac*	1,089	04:24.7	\$11,788,987
Nationwide*	510	41:09.0	\$11,781,350

Note: Allstate also ranked No. 1 in 2007, its last year as NASCAR's official insurance company, with 360 detections worth \$24.8 million.

* Official sponsor of NASCAR



GETTY IMAGES (3)

Jimmie Johnson (left) was high man for Lowe's, Kasey Kahne (center) made the list but not the Chase, and M&M's enjoyed a sweet jump in exposure thanks to Kyle Busch.

TOP DRIVERS

For the year, 101 drivers received at least one detection for a sponsor placement. Following are the leaders, which sees the 12 Chase drivers among the top 13.

Rank (final Sprint Cup rank)	Driver	No. of detections	Duration (h:min:sec)	Value
1 (1)	Jimmie Johnson	12,541	56:10.7	\$69,008,051
2 (2)	Carl Edwards	6,991	43:06.3	\$49,820,866
3 (12)	Dale Earnhardt Jr.	7,336	10:29.0	\$47,596,358
4 (10)	Kyle Busch	6,696	04:48.7	\$43,649,041
5 (7)	Jeff Gordon	6,238	32:22.3	\$39,491,212
6 (6)	Jeff Burton	4,068	55:58.7	\$33,853,168
7 (3)	Greg Biffle	4,650	33:09.7	\$26,182,155
8 (11)	Matt Kenseth	3,751	34:03.7	\$21,831,356
9 (9)	Tony Stewart	2,853	07:12.0	\$26,959,091
10 (5)	Clint Bowyer	3,320	02:25.3	\$19,424,068
11 (14)	Kasey Kahne*	2,883	56:55.0	\$22,058,373
12 (4)	Kevin Harvick	2,972	49:19.7	\$20,677,468
13 (8)	Denny Hamlin	3,075	46:15.7	\$22,243,810

* Did not qualify for the Chase for the Sprint Cup

AT THE TRACK

Races that generated the most value for on-site billboard sponsors

Rank	Race (date)	Track	Value
1	Toyota/Save Mart 350 (June 22)	Infineon Raceway (Sonoma, Calif.)	\$4,265,118
2	Best Buy 400 (June 1)	Dover (Del.) Int'l Speedway	\$3,885,542
3	Food City 500 (March 16)	Bristol (Tenn.) Motor Speedway	\$3,468,758
4	Auto Club 500 (Feb. 24*)	Auto Club Speedway (Fontana, Calif.)	\$3,455,670
5	Centurion Boats at The Glen (Aug. 10)	Watkins Glen (N.Y.) Int'l Raceway	\$3,135,189

* Rain-suspended race concluded on Monday, Feb. 25