SportsPro

# NASCAR 2025 BUSINESS REPORT




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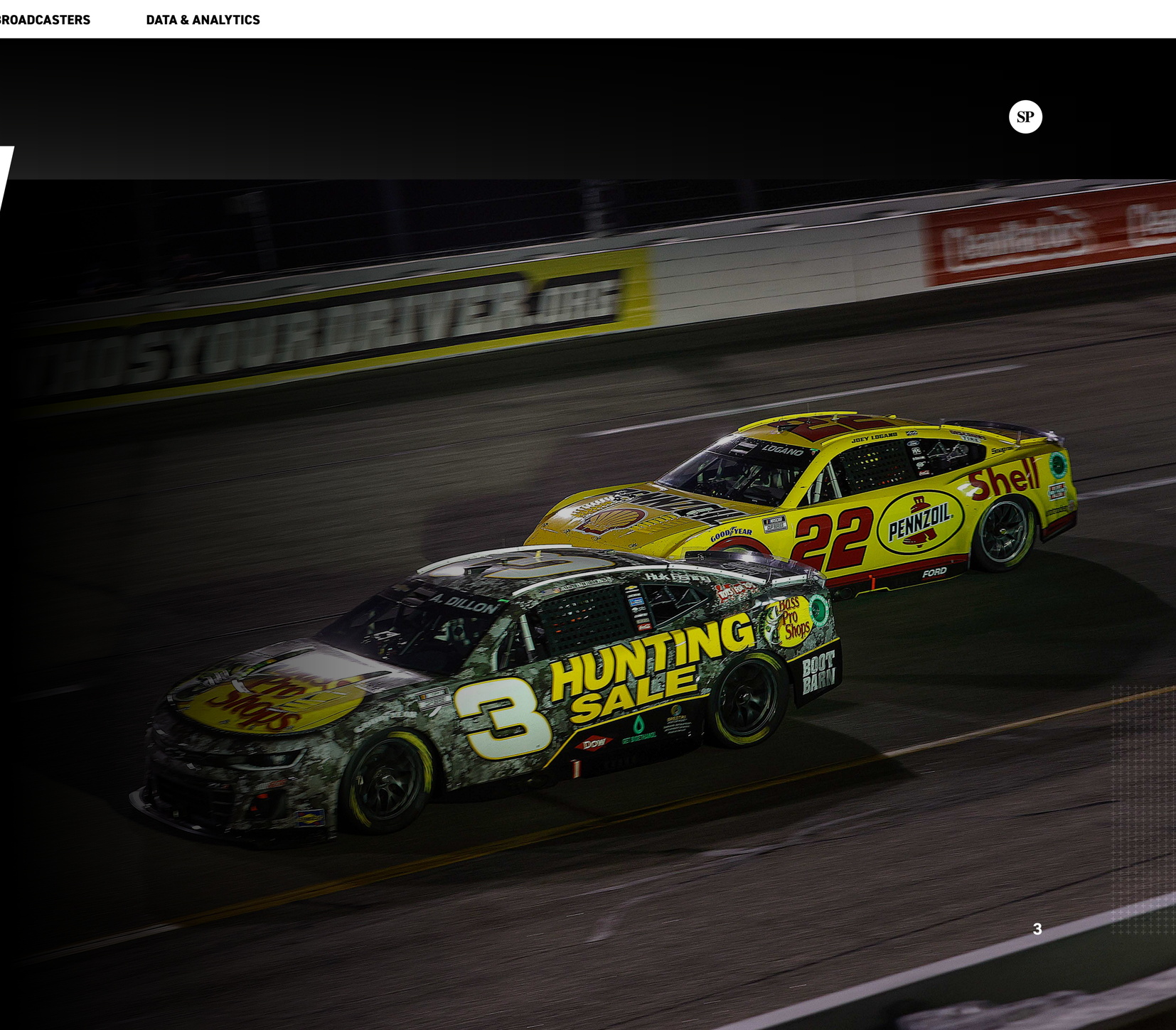

# OVERVIEW

**This could prove to be a tumultuous year for Nascar, which would be unwelcome news for a series in need of certainty.**

Nascar steps into the first season of its landmark broadcast deal with Fox, NBC, Warner Bros Discovery (WBD) and Amazon on unsteady ground, with a lawsuit hanging over the series after months of wrangling regarding the new charter agreement. The majority of teams may have eventually been convinced to sign the deal, but the coalition of Front Row Motorsports and 23XI Racing is taking a stand.

Thanks to a preliminary injunction delivered in December, the two teams are competing as chartered entries in 2025 despite ongoing legal action against the series, a scenario that looked unlikely a few months ago. Nascar's motions to dismiss the antitrust lawsuit were denied by a judge earlier this month.

On the sponsorship front, Nascar has secured much-needed extensions with primary partners Xfinity and Anheuser-Busch, although the former will be dropping its naming rights deal with the second-tier National Series at the end of this year. Crucially, there is no replacement for Geico in the partnership model as of yet, meaning the series enters 2025 with just three premier partners.



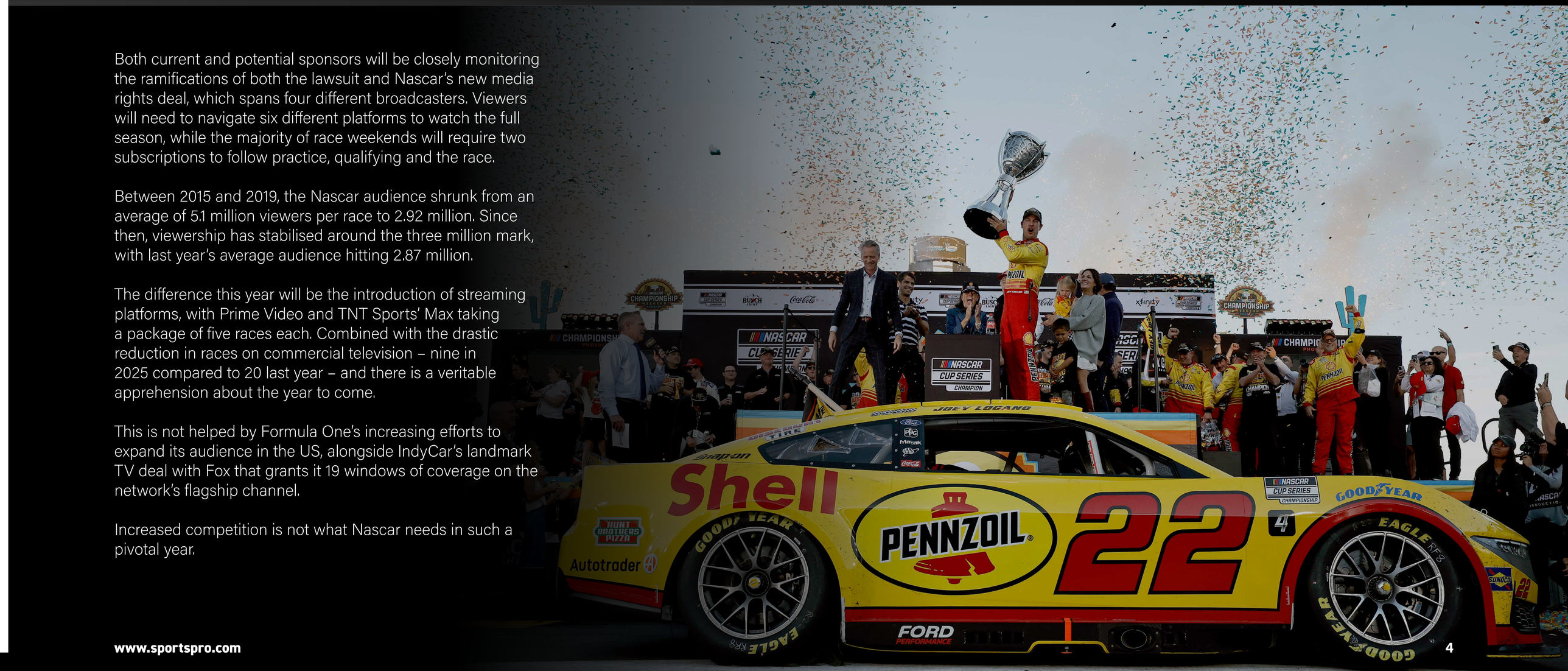
Both current and potential sponsors will be closely monitoring the ramifications of both the lawsuit and Nascar's new media rights deal, which spans four different broadcasters. Viewers will need to navigate six different platforms to watch the full season, while the majority of race weekends will require two subscriptions to follow practice, qualifying and the race.

Between 2015 and 2019, the Nascar audience shrunk from an average of 5.1 million viewers per race to 2.92 million. Since then, viewership has stabilised around the three million mark, with last year's average audience hitting 2.87 million.

The difference this year will be the introduction of streaming platforms, with Prime Video and TNT Sports' Max taking a package of five races each. Combined with the drastic reduction in races on commercial television – nine in 2025 compared to 20 last year – and there is a veritable apprehension about the year to come.

This is not helped by Formula One's increasing efforts to expand its audience in the US, alongside IndyCar's landmark TV deal with Fox that grants it 19 windows of coverage on the network's flagship channel.

Increased competition is not what Nascar needs in such a pivotal year.



# TEAMS



# 23XI RACING



#23 Bubba Wallace



#35 Riley Herbst



#45 Tyler Reddick

OWNERS
**Denny Hamlin, Michael Jordan and Curtis Polk**

PRESIDENT
**Steve Lauletta**

MANUFACTURER
**Toyota**

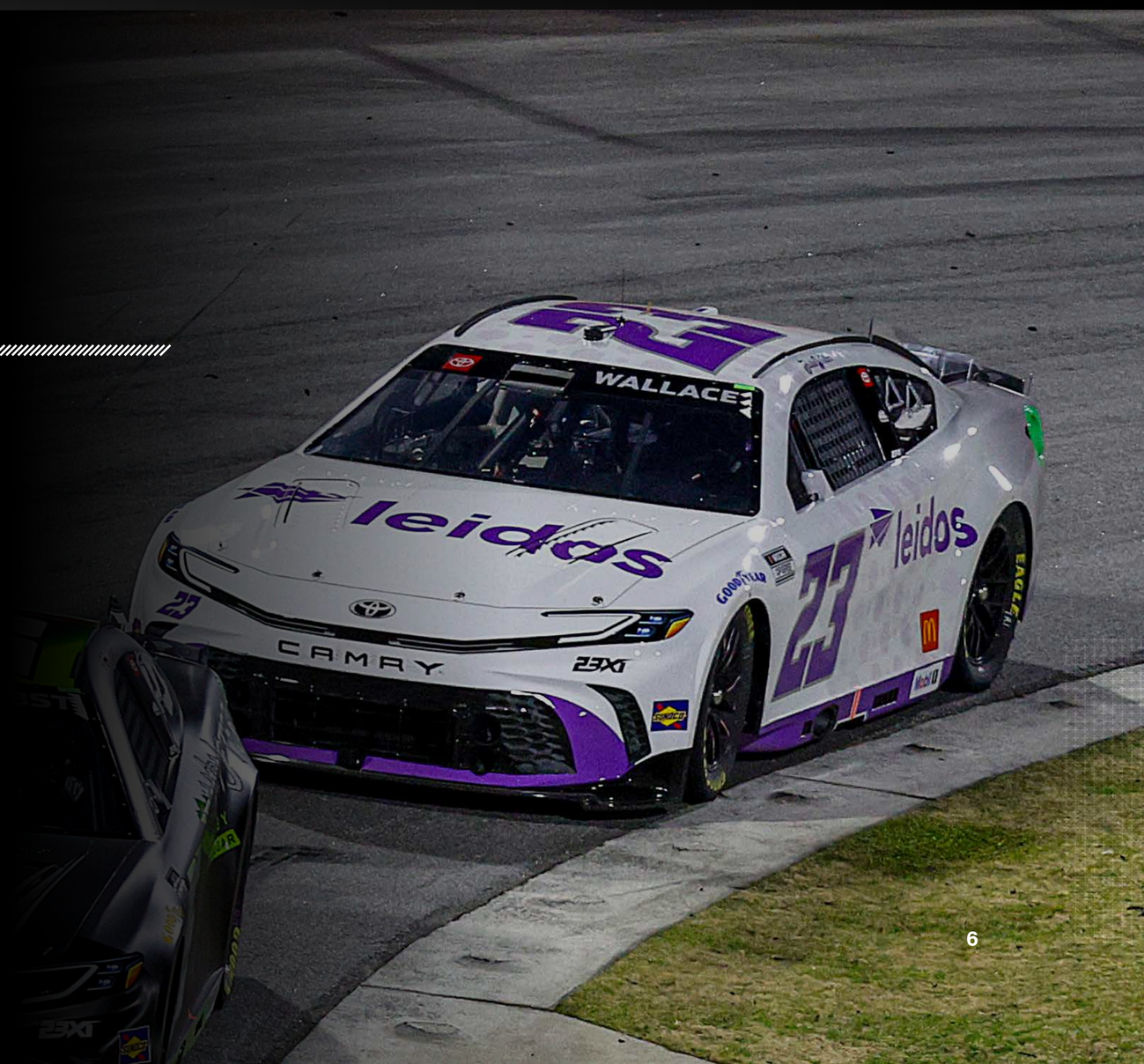
DRIVERS
**#23 Bubba Wallace**
**#35 Riley Herbst**
**#45 Tyler Reddick**

BASE
**Huntersville, North Carolina**

FOUNDED
**2020**

PRIMARY PARTNERS
**Chumba Casino, Columbia, Jordan Brand, Leidos, McDonald's, Monster Energy, Virtual Gaming Worlds, Xfinity**

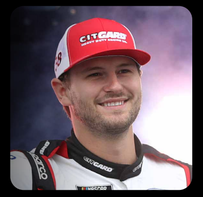
OTHER PARTNERS
**DraftKings, Mack Trucks, Melin, Mobil 1, NBA 2K25, Shady Rays, Terrible's, Toyota, US Air Force, Walmart**



# FRONT ROW MOTORSPORTS



#4 Noah Gragson



#34 Todd Gilliland



#38 Zane Smith

OWNER
**Bob Jenkins**

PRESIDENT
**Jerry Freeze**

MANUFACTURER
**Ford**

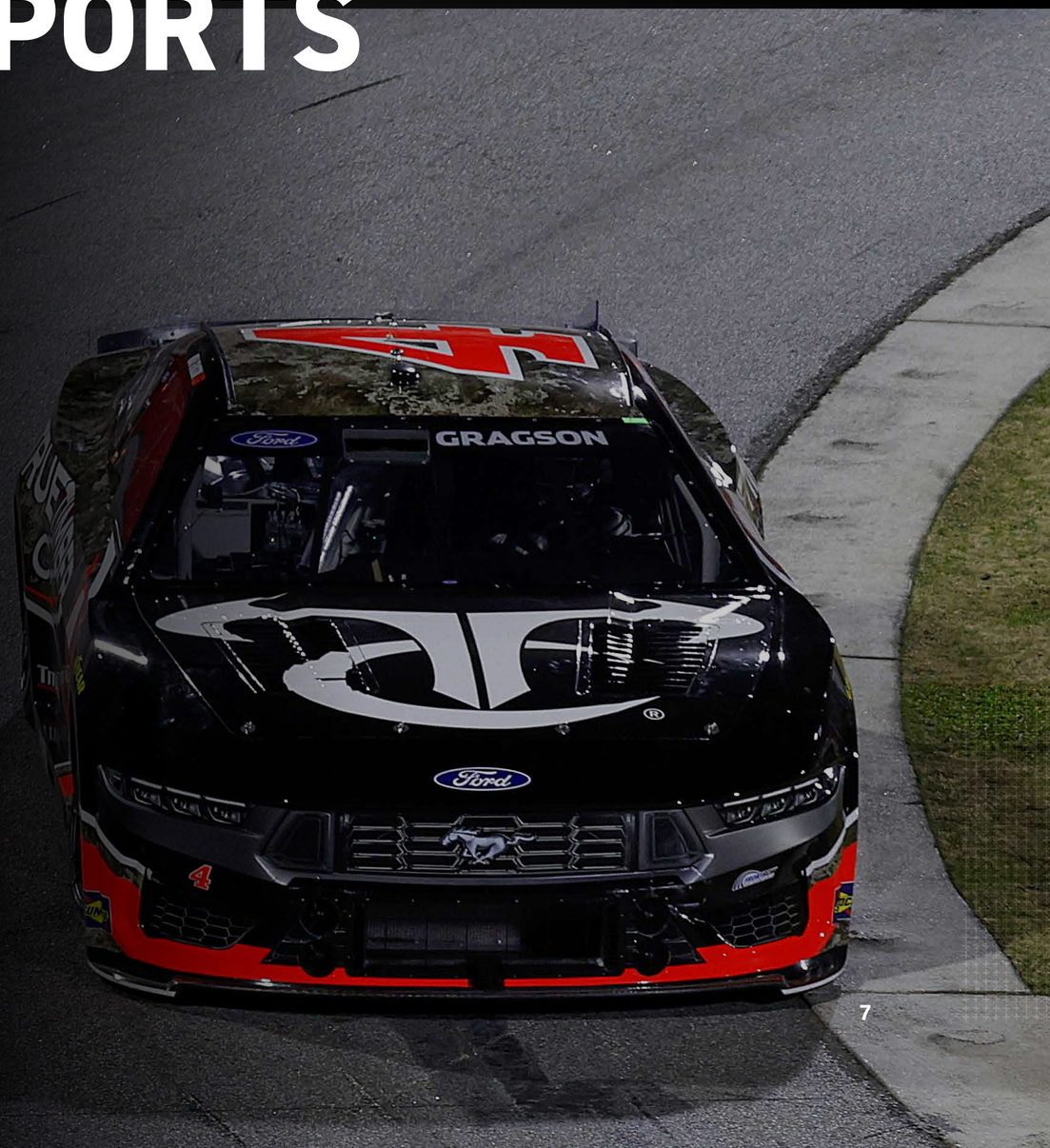
DRIVERS
**#4 Noah Gragson**
**#34 Todd Gilliland**
**#38 Zane Smith**

BASE
**Mooresville, North Carolina**

FOUNDED
**2004**

PRIMARY PARTNERS
**Aaron's, Benebone, B'laster, Charlotte Knights, Chicago White Sox, Citgard, Frontline Enterprises, Gener8tor, Georgia Peanuts, Grillo's Pickles, Horizon Hobby, Infinity Communications Group, Losi, Love's Travel Stops, Margaritaville at Sea, MillerTech, Northside Hospital, Quincy Compressor, Ruedebusch, Siteman Cancer Center, Speedco, Speedy Cash, TitleMax, Walmart, Zep**

OTHER PARTNERS
**Dr. Pepper, K&N Filters, Lincoln Welders, Mac Tools, Racing Electronics, Safety-Kleen, SEM, Sherwin-Williams, Wiley X**



# HAAS FACTORY TEAM



#41 Cole Custer

OWNER
**Gene Haas**

PRESIDENT
**Joe Custer**

MANUFACTURER
**Ford**

DRIVERS
**#41 Cole Custer**

BASE
**Kannapolis, North Carolina**

FOUNDED
**2025**

PRIMARY PARTNERS
**HaasTooling.com**

OTHER PARTNERS
**3D Systems, Andy's Frozen Custard, Audibel, Autodesk, Caymus Vineyards, Friends of Jaclyn Foundation, Johnsen's, Lincoln Electric, Mobil 1, SEM, Simpson**



# HENDRICK MOTORSPORTS



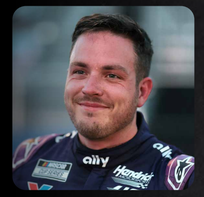
#5 Kyle Larson



#9 Chase Elliott



#24 William Byron



#48 Alex Bowman

OWNER
**Jeff Gordon and Rick Hendrick**

PRESIDENT
**Jeff Andrews**

MANUFACTURER
**Chevrolet**

DRIVERS
**#5 Kyle Larson**
**#9 Chase Elliott**
**#24 William Byron**
**#48 Alex Bowman**

BASE
**Concord, North Carolina**

FOUNDED
**1984**

PRIMARY PARTNERS
**Ally, Axalta, Chevrolet, Hendrick Cars, Hewlett Packard, Kelley Blue Book, Liberty University, Llumar, Napa, Prime Video, Relay Payments, UniFirst, Valvoline**

OTHER PARTNERS
**Acronis, All-Pro Reconditioning, Amper, Castore, Cincinnati, Club Car, Coca-Cola, Constructor, Freightliner, Grob Group, Hexagon, Island, LoJack, Lord Corporation, Mac Tools, Mechanix Wear, Miller Welders, Ricoh, Siemens, Sunnen, Veriti, Wix Filters**



# HYAK MOTORSPORTS



#47 Ricky Stenhouse Jr.

OWNER
**Gordon Smith, Brad Daugherty, Mark Hughes and Ernie Cope**

CHIEF EXECUTIVE
**Gordon Smith**

MANUFACTURER
**Chevrolet**

DRIVER
**#47 Ricky Stenhouse Jr.**

BASE
**Harrisburg, North Carolina**

FOUNDED
**1995**

PRIMARY PARTNERS
**Chevrolet, Martin's Potato Rolls, SunnyD**

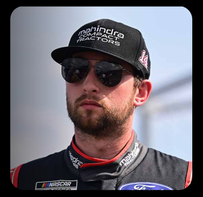
OTHER PARTNERS
**Hungry Jack, Nos Energy Drink**



# JOE GIBBS RACING



#11 Denny Hamlin



#19 Chase Briscoe



#20 Christopher Bell



#54 Ty Gibbs

OWNER
**Joe Gibbs, Harris Blitzer Sports & Entertainment and Arctos Partners (minority stake)**

PRESIDENT
**Dave Alpern**

MANUFACTURER
**Toyota**

DRIVERS
**#11 Denny Hamlin**
**#19 Chase Briscoe**
**#20 Christopher Bell**
**#54 Ty Gibbs**

BASE
**Huntersville, North Carolina**

FOUNDED
**1992**

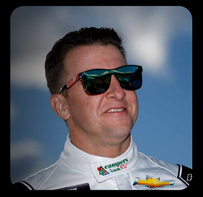
PRIMARY PARTNERS
**Bass Pro Shops, Craftsman, DeWalt, Interstate Batteries, King's Hawaiian, Menards, Mobil 1, Monster Energy, National Debt Relief, Reser's Fine Foods, Rheem, Saia, SiriusXM, SoundGear, SportClips, Toyota, Yahoo**

OTHER PARTNERS
**Bosch Plugs, Coca-Cola, Corvid HPC, DN Solutions, Flow International Corporation, JobBoss, Joe Gibbs Manufacturing Solutions, Lance, Lincoln Electric, Mac Tools, Mahr, Mitsubishi EDM/Laser, MSC Industrial Supply, MSI-Viking Gage, National Air Traffic Controllers Association, Sandvik Coromant, Schunk, Sherwin-Williams, Siemens, Stratasys, Strategic Education Inc, Telesis**

# KAULIG RACING



#10 Ty Dillon



#16 A.J. Allmendinger

OWNER
**Matt Kaulig**

PRESIDENT
**Chris Rice**

MANUFACTURER
**Chevrolet**

DRIVERS
**#10 Ty Dillon**
**#16 A.J. Allmendinger**

BASE
**Welcome, North Carolina**

FOUNDED
**2016**

PRIMARY PARTNERS
**American Snuff Company, Campers Inn RV, Chevrolet, Sea Best**

OTHER PARTNERS
**Acceptance Insurance, Action Industries, AG1, Alloy Employer Services, Amarr, Barger Precast, BathPlanet, Benesch, Black's Tire, Black Wdow Call 811, CarBravo, Champion Container, Cheetos, Cirkul, Celsius, Ellsworth Advisors, Fallen Outdoors, Fit-RX, Focused Health, Gabriel-Glas, Hyperice, K1 Race Gear, Kafka Conveyors, Kaulig Companies, Kaulig Media, Kubotausa, LA Golf, LeafFilter, Leaf Home, Lincoln Electric, Modern Day Garage, Morris-Shea, Mountain Dew, Poppy Bank, Project Wyoming, Quad Lock, Race to Stop Suicide, South Point Casino, Starbrite, WeatherTech, Western States Flooring, Wix Filters**



# LEGACY MOTOR CLUB



#42 John Hunter Nemechek



#43 Erik Jones

OWNER
**Maury Gallagher, Jimmie Johnson, and Richard Petty**

PRESIDENT
**Mike Beam**

MANUFACTURER
**Toyota**

DRIVERS
**#42 John Hunter Nemechek**
**#43 Erik Jones**

BASE
**Statesville, North Carolina**

FOUNDED
**2021**

PRIMARY PARTNERS
**Advent Health, Carvana, Dollar Tree, DriveValue, Family Dollar, Massey Motor Freight, Mobil 1, Pye-Barker Fire & Safety, Toyota, Toyota Gazoo Racing**

OTHER PARTNERS
**5-Hour Energy, Aeon Laser USA, Arlon, Bic, Chips Ahoy!, Club Wyndham, Coca-Cola, Colgate, D30, Dixie, Dove, Energizer, Fritos, Gear Wrench, Henkel, Jack Link's, Kraft Heinz, Lincoln Welders, Newmar, Olipop, Oreo, Purina, Reese's, Ritz, Rollover, Safety-Kleen, SEM, Sour Patch Kids, Tyson Foods**



# RFK RACING



#6 Brad Keselowski



#17 Chris Buescher



#60 Ryan Preece

OWNER
**Jack Roush, John Henry, and Brad Keselowski**

PRESIDENT
**Steve Newmark**

MANUFACTURER
**Ford**

DRIVERS
**#6 Brad Keselowski**
**#17 Chris Buescher**
**#60 Ryan Preece**

BASE
**Concord, North Carolina**

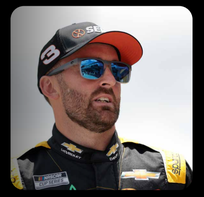
FOUNDED
**1988**

PRIMARY PARTNERS
**Build Submarines, Castrol, Consumer Cellular, Esperion Therapeutics, Fastenal, Fifth Third Bank, Ford, Kroger, Mohawk Northeast, Solomon Plumbing, Travel Centers of America**

OTHER PARTNERS
**Bell Helmets, Constructor, Faro, Flow Software, Ford Performance, Hoist, International Trucks, K&N Filters, Lumafield, OMP, Raybestos, Siemens, SysPro, Tulip**



# RICHARD CHILDRESS RACING



#3 Austin Dillon



#8 Kyle Busch

OWNER
**Richard Childress**

PRESIDENT
**Mike Verlander**

MANUFACTURER
**Chevrolet**

DRIVERS
**#3 Austin Dillon**
**#8 Kyle Busch**

BASE
**Welcome, North Carolina**

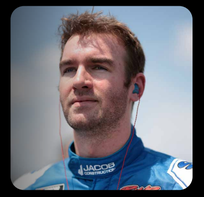
FOUNDED
**1969**

PRIMARY PARTNERS
**Bass Pro Shops, Bank OZK, Chevrolet, Dow, Lucas Oil, Rebel Bourbon, Titan Risk Solutions, Winchester, Zone**

OTHER PARTNERS
**Alsco Uniforms, Ansys, ARP, Bennett Transportation & Logistics, BetMGM, Boot Barn, Breztri, Campers Inn RV, Cheddar's, Coca-Cola, Cometic, Get Bioethanol, Global Industrial, Huk, JobBoss, Kalahari Resorts & Conventions, Lenovo, Mack Trucks, Mahle, Mechanix Wear, Miller Welding, Morgan & Morgan, Okuma, Omax, PTC, Roland, Samsara, Senix, Sherwin-Williams, Smith Bros Push Rods, Sodick, Sparco, Toys for Tots, United Rentals, Whelen Engineering, Zeiss**



# RICK WARE RACING



#51 Cody Ware

OWNER
**Rick Ware**

PRESIDENT
**Robby Benton**

MANUFACTURER
**Ford**

DRIVERS
**#51 Cody Ware**

BASE
**Concord, North Carolina**

FOUNDED
**1998**

PRIMARY PARTNERS
**American Red Cross, Arby's, Jacobs Construction, Mighty Fire Breakers, Parts Plus**

OTHER PARTNERS
**CRC Industries, Get Bioethanol, Lincoln Welders, Mac Tools, Sunoco**



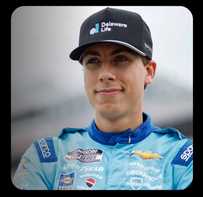
# SPIRE MOTORSPORTS



#7 Justin Haley



#71 Michael McDowell



#77 Carson Hocevar

OWNER
**Jeff Dickerson, TJ Puchyr and TWG Global**

PRESIDENT
**Doug Duchardt**

MANUFACTURER
**Chevrolet**

DRIVERS
**#7 Justin Haley**
**#71 Michael McDowell**
**#77 Carson Hocevar**

BASE
**Mooresville, North Carolina**

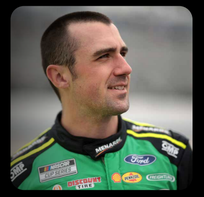
FOUNDED
**2018**

PRIMARY PARTNERS
**B'laster, Chevrolet, Delaware Life, Fraternal Order of Eagles, Gainbridge, Miner, Workforce, Zeigler Auto Group**

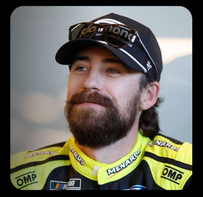
OTHER PARTNERS
**Bon Secours, Chili's, Cometic Gasket, Dorman, Garner Trucking, GGT Energy Solutions, Group 1001, HendrickCars.com, Katz Coffee, Kennametal, Lincoln Welders, Mattress Warehouse, Mechanix Wear, Mobil 1, Molecule, Nations Guard, Parity, Safety-Kleen, SEM, Sherwin-Williams, Sparco, Usana, Wix Filters**



# TEAM PENSKE



#2 Austin Cindric



#12 Ryan Blaney



#22 Joey Logano

OWNERS
**Roger Penske**

PRESIDENT
**Michael Nelson**

MANUFACTURER
**Ford**

DRIVERS
**#2 Austin Cindric**
**#12 Ryan Blaney**
**#22 Joey Logano**

BASE
**Mooresville, North Carolina**

FOUNDED
**1972**

PRIMARY PARTNERS
**Advance Auto Parts, Autotrader, Discount Tire, Ford, Freightliner, Hunt Brothers Pizza, Menards, Pennzoil, Wabash, Wurth**

OTHER PARTNERS
**AAA, Astemo, Big Daishowa, BodyArmor, Capgemini, CarShop, Cintas, Coca-Cola, Dent Wizard, Dex Imaging, EnerSys, FlightSafety International, Good Ranchers, Gulfstream, Lincoln Welders, Mazak, Molson Coors, Nikon Metrology, Penske Transportation Solutions, PPG, PVA, Racing Force Group, Safety-Kleen, Siemens, Snap-on, Stratasys, Thorne, Tungaloy**



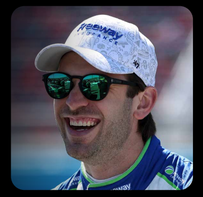
# TRACKHOUSE RACING



#1 Ross Chastain



#88 Shane van Gisbergen



#99 Daniel Suárez

OWNERS
**Justin Marks**

PRESIDENT
**Ty Norris**

MANUFACTURER
**Chevrolet**

DRIVERS
**#1 Ross Chastain**
**#88 Shane van Gisbergen**
**#99 Daniel Suárez**

BASE
**Concord, North Carolina**

FOUNDED
**2020**

PRIMARY PARTNERS
**Busch Light, Choice Privileges, Freeway Insurance, Moose Fraternity, Worldwide Express, Red Bull**

OTHER PARTNERS
**Chevrolet, Coca-Cola, Focused Health, GoPro, Jockey, Kubota, Quaker State, Siemens, Tootsies, Renu, Wendy's, Workforce**



# WOOD BROTHERS RACING



#21 Josh Berry

OWNERS
**The Wood family**

PRESIDENT
**Jon Wood**

MANUFACTURER
**Ford**

DRIVER
**#21 Josh Berry**

BASE
**Stuart, Virginia**

FOUNDED
**1950**

PRIMARY PARTNERS
**Dex Imaging, Ford, Menards, Motorcraft, Quick Lane**

OTHER PARTNERS
**ARP, Goodyear, Lincoln Welders, Safety-Kleen, Sunoco, University of Racing**



# INSIGHT

## NASCAR 2024 SEASON REVIEW: OFF-TRACK POLITICS THREATEN TO DERAIL POSITIVE MOMENTUM

**It was far from smooth sailing for Nascar in 2024, but there were signs of progress amid escalating issues away from the circuit. BlackBook Motorsport analyses why last year's viewership figures were particularly promising, how the series has placed a particular focus on the younger generation, and the potential for international expansion in the future.**

Joey Logano became the tenth driver in Nascar Cup Series history to win three or more championships after his victory at Phoenix Raceway, taking home Team Penske's fifth title.



The buildup to the championship race was anything but smooth with a controversial outing at Martinsville that saw nine race manipulation penalties handed out in the aftermath. If anything, this was a microcosm of the season at large – and specifically the charters.

Nascar and its teams have not exactly seen eye to eye throughout the prolonged negotiations over the new charter agreement, with the contract eventually signed after two years of disagreements and more than six months on from the original hard deadline.

Even then, Front Row Motorsports (FRM) and Michael Jordan's 23XI Racing refused the proposal, which has now blown up into a lawsuit alleging monopolistic practices and anticompetitive behaviour by Nascar.

Those on both sides of this deepening divide will hope it doesn't spill over too far into next year, especially with a landmark TV deal getting underway across four broadcasters.

Nascar is also attempting to market itself as more of an international product, so the in-fighting is hardly contributing to that goal. With a global icon like Michael Jordan lining up against Nascar, it just exacerbates the potential damage for the stock car racing series.

In light of these off-track issues, BlackBook Motorsport analyses the current health of Nascar and looks at how the series is set up for future success if all sides can begin working towards a common goal.

## Dented Daytona hides viewership gains

While there may have been various off-track complications, analysing viewership trends remains a comparatively simple way to assess the overall health and direction of Nascar.

On the whole, 2024 appears to emphasise consistency. Regular season viewership rose one per cent year-over-year (YoY) to an average of 3.13 million and playoffs viewership was up five per cent YoY to 2.3 million, but neither figure quite matched the 2022 results (3.28 million and 2.38 million, respectively).

But there is some important wider context to these numbers.

Firstly, and most crucially, the Daytona 500 was severely affected by rain, which meant viewership suffered greatly. This year's audience of 5.96 million was the second lowest of all time for the iconic race, yet overall viewership for Nascar this season didn't dip.

The preseason Clash event suffered a similar fate with the race being moved to Saturday due to inclement weather, and just 1.51 million viewers tuned in as a result. Compare that to audiences of 3.65 million in 2023 and 4.28 million in 2022 and the downturn is stark.

Indeed, weather was a particular challenge for the series this season, as Nascar president Steve Phelps pointed out in his State of the Sport press conference prior to the championship finale.

"We had an event, the Clash at The Coliseum, and we were looking at a historic atmospheric river for our event – that's what they called it – just a lot of rain," said Phelps. "I think we'll go with that. So, we did something we had never done before. We pulled a race up a day, and we raced on Saturday night.

"Got crushed in the ratings. Fans didn't know when it was, how they were going to get there … Saturday's the lowest-rated day of the week. But it was the right thing to do. It was a financial bath for us, but it was the right thing to do for the industry.

"Go two weeks down the road, and we had more rain. So, we delayed the start of the [Daytona 500] a full day, and we took a ratings bath. So, we were down minus-27. Then we had a rain-shortened race at the Coca-Cola 600, a rain-interrupted event at the Chicago Street Race, so three of your biggest races – down double digits."

For Nascar's full season viewership to have matched last year's figure considering the dramatic drop off in its biggest races is a notable achievement – and particularly promising ahead of a new broadcast deal.

## Charting an uncertain course

Nascar steps into its landmark broadcast deal with Fox, NBC, Warner Bros Discovery (WBD) and Amazon on unsteady ground, with a lawsuit hanging over the series after months of wrangling over the new charter agreement.

The majority of teams may have eventually been convinced to sign the deal, but the coalition of FRM and 23XI Racing is taking a stand.

The fact that this involves National Basketball Association (NBA) legend Michael Jordan means that Nascar has to take this particularly seriously, and the rebel teams initially took a hit in their quest to change the financial landscape in the sport.

A request from FRM and 23XI Racing for an injunction that would allow them to continue competing as chartered entries this season while their lawsuit with Nascar proceeds was initially rejected by a federal judge on 8th November.



At the time, Phelps would not be pressed on the ongoing court case, but pointed out that the deal offered to the teams provided a big financial uptick.

"We are not going to negotiate in the media about charters, ever," he said. "And we are very happy that 32 of the 36 charters were extended because those were race teams that where the deal that was put on the table for them, the primary big win for the race teams was money.

"I won't go into what the money split looks like, but what I will say is that the amount of money, it now puts the race teams, starting in [2025], as the single largest beneficiary of our media deal. And we did that because the race teams were upside down financially."

Nascar was bullish until a preliminary injunction was granted to 23XI Racing and FRM, which means the two rebel outfits can compete as chartered entries for the 2025 season while the lawsuit continues.

Both teams were also granted permission to purchase charters from Stewart-Haas Racing, which closed its Nascar operation at the end of the 2024 season.

FRM owner Bob Jenkins had told the Associated Press that the two teams stood to miss out on US$45 million in combined revenue if they competed as 'open' entries without charters.

Nascar moved to get the motion dismissed in January 2025 but the request was denied. Most recently, on the eve of Daytona 500 qualifying, the series submitted a 68-page appeal against the decision to award the two teams with charters.

## Focusing on the future

Though uncertainty continues off track, Nascar is doing what it can to futureproof itself.

Nascar may not be the first sport that comes to mind when thinking about future-facing properties, but a particular focus on digital and gaming strategies this year could see that change.

The series' digital platforms averaged nearly six million unique visitors per month in 2024, which marks the sixth consecutive year of growth.

This translated across to Nascar's gaming ventures as the series saw record-high engagement this year with multiple touchpoints for younger audiences to get involved.

Nascar's long-running partnership with iRacing is going from strength to strength after 15 years, and the upcoming video game on console should give the series wider reach. Nascar and iRacing also partnered with Playfly Sports this year for the return of a grassroots esports series featuring 300 colleges and universities competing for US$60,000 in prizes.

A collaboration with Roblox on 'Nascar Tycoon', which lets players dive into the management and racing aspects of the series, was the most-visited sports brand experience on the online game platform in August, with seven million visits, 40 per cent of which were users under the age of 18.

The series also launched a mobile game with Hutch called 'Nascar Manager' that has seen 1.75 million downloads and 23,000 daily active users after launching at the end of last year.

Additionally, Nascar partnered with esports organisation Blast to sponsor both the 2024 Fortnite Championship Series (FNCS) Global Championship and Rocket League World Championship, and became the first sports brand to launch three custom Rocket Racing tracks (Chicago, Daytona, Talladega) in Fortnite ahead of the real-world events.

Most recently, Nascar made its first step into Forza Motorsport, with the Ford, Chevrolet and Toyota cars from this season now all available to drive in the game.

# 2025 NASCAR CUP SERIES CALENDAR

| | Race | Track | Location | Date | Broadcaster |
|---|---|---|---|---|---|
| | **Cook Out Clash** | Bowman Gray Stadium | Winston-Salem, North Carolina | 2nd February | Fox |
| | **Daytona Duel** | Daytona International Speedway | Daytona Beach, Florida | 13th February | Fox |
| 1 | **Daytona 500** | Daytona International Speedway | Daytona Beach, Florida | 16th February | Fox |
| 2 | **Ambetter Health 400** | Atlanta Motor Speedway | Hampton, Georgia | 23rd February | Fox |
| 3 | **EchoPark Automotive Grand Prix** | Circuit of The Americas | Austin, Texas | 2nd March | Fox |
| 4 | **Shriners Children's 500** | Phoenix Raceway | Avondale, Arizona | 9th March | FS1 |
| 5 | **Pennzoil 400** | Las Vegas Motor Speedway | Las Vegas, Nevada | 16th March | FS1 |
| 6 | **Straight Talk Wireless 400** | Homestead-Miami Speedway | Homestead, Florida | 23rd March | FS1 |
| 7 | **Cook Out 400** | Martinsville Speedway | Martinsville, Virginia | 30th March | FS1 |
| 8 | **Goodyear 400** | Darlington Raceway | Darlington, South Carolina | 6th April | FS1 |
| 9 | **Food City 500** | Bristol Motor Speedway | Bristol, Tennessee | 13th April | FS1 |
| 10 | **Jack Link's 500** | Talladega Superspeedway | Talladega, Alabama | 27th April | Fox |
| 11 | **Würth 400 presented by Liqui Moly** | Texas Motor Speedway | Fort Worth, Texas | 4th May | FS1 |
| 12 | **AdventHealth 400** | Kansas Speedway | Kansas City, Kansas | 11th May | FS1 |
| | **All-Star Race** | North Wilkesboro Speedway | North Wilkesboro, North Carolina | 18th May | FS1 |
| 13 | **Coca-Cola 600** | Charlotte Motor Speedway | Concord, North Carolina | 25th May | Prime Video |
| 14 | **Nascar Cup Series Race at Nashville** | Nashville Superspeedway | Lebanon, Tennessee | 1st June | Prime Video |
| 15 | **FireKeepers Casino 400** | Michigan International Speedway | Brooklyn, Michigan | 8th June | Prime Video |
| 16 | **Nascar Cup Series Race at Mexico City** | Autódromo Hermanos Rodríguez | Mexico City, Mexico | 15th June | Prime Video |
| 17 | **Nascar Cup Series Race at Pocono** | Pocono Raceway | Long Pond, Pennsylvania | 22nd June | Prime Video |

# 2025 NASCAR CUP SERIES CALENDAR CONTINUED...

| | Race | Track | Location | Date | Broadcaster |
|---|---|---|---|---|---|
| 18 | **Quaker State 400 available at Walmart** | Atlanta Motor Speedway | Hampton, Georgia | 28th June | TNT |
| 19 | **Grant Park 165** | Chicago Street Race | Chicago, Illinois | 6th July | TNT |
| 20 | **Toyota / Save Mart 350** | Sonoma Raceway | Sonoma, California | 13th July | TNT |
| 21 | **Autotrader EchoPark Automotive 400** | Dover Motor Speedway | Dover, Delaware | 20th July | TNT |
| 22 | **Brickyard 400 presented by PPG** | Indianapolis Motor Speedway | Speedway, Indiana | 27th July | TNT |
| 23 | **Iowa Corn 350 powered by Ethanol** | Iowa Speedway | Newton, Iowa | 3rd August | USA Network |
| 24 | **Go Bowling at The Glen** | Waktins Glen International | Watkins Glen, New York | 10th August | USA Network |
| 25 | **Cook Out 400** | Richmond Raceway | Richmond, Virginia | 16th August | USA Network |
| 26 | **Coke Zero Sugar 400** | Daytona International Speedway | Daytona Beach, Florida | 23rd August | NBC |
| | **Playoffs** | | | | |
| 27 | **Southern 500** | Darlington Raceway | Darlington, South Carolina | 31st August | USA Network |
| 28 | **Enjoy Illinois 300** | World Wide Technology Raceway | Madison, Illinois | 7th September | USA Network |
| 29 | **Bass Pro Shops Night Race** | Bristol Motor Speedway | Bristol, Tennessee | 13th September | USA Network |
| 30 | **Nascar Cup Series Race at New Hampshire** | New Hampshire Motor Speedway | Loudon, New Hampshire | 21st September | USA Network |
| 31 | **Hollywood Casino 400** | Kansas Speedway | Kansas City, Kansas | 28th September | USA Network |
| 32 | **Bank of America Roval 400** | Charlotte Motor Speedway Road Course | Concord, North Carolina | 5th October | USA Network |
| 33 | **South Point 400** | Las Vegas Motor Speedway | Las Vegas, Nevada | 12th October | USA Network |
| 34 | **Nascar Cup Series Race at Talladega** | Talladega Superspeedway | Talladega, Alabama | 19th October | NBC |
| 35 | **Nascar Cup Series Race at Martinsville** | Martinsville Speedway | Martinsville, Virginia | 26th October | NBC |
| 36 | **Championshp Race** | Phoenix Raceway | Avondale, Arizona | 2nd November | NBC |

# OFFICIAL PARTNERS

## NASCAR PREMIER PARTNERS

| Company | Official designation | Partner since | Latest extension | Duration |
|---|---|---|---|---|
| **Busch Light** | Official beer | 2018 | 2025 | Multi-year |
| **Coca-Cola** | Official fan refreshment | 1998 | 2020 | Multi-year |
| **Xfinity** | Official cable service provider, National Series sponsor | 2015 | 2025 | Multi-year |

# OFFICIAL PARTNERS

## NASCAR PARTNERS

| Company | Official designation | Partner since | Latest extension | Duration |
|---|---|---|---|---|
| ABB | Official electrification partner | 2024 | | Multi-year |
| Advance Auto Parts | Official auto parts retailer | 2020 | | Multi-year |
| Ally Financial | Official consumer bank | 2023 | | Multi-year |
| American Express | Official credit card payment network | 2022 | | Multi-year |
| AMR | Official emergency medical services partner | 2017 | 2021 | Multi-year |
| BetMGM | Authorised gaming partner | 2020 | | Multi-year |
| Boys & Girls Clubs of America | Official youth community partner | 2021 | | Multi-year |
| Cabo Wabo | Official tequila | 2023 | | Multi-year |
| Chevrolet | Official partner | 2000 | 2022 | Multi-year |
| Cometic | Official performance partner | 2020 | | Multi-year |
| Credit One Bank | Official credit card | 2016 | 2022 | Multi-year |
| DraftKings | Official daily fantasy sports game | 2021 | | Multi-year |
| Elgin Sweeper | Official Nascar Green partner | 2014 | 2020 | Multi-year |
| Fanatics | Official online retailer | 2015 | | Multi-year |

| Company | Official designation | Partner since | Latest extension | Duration |
|---|---|---|---|---|
| FanDuel | Authorised gaming partner | 2023 | | Multi-year |
| Featherlite | Official trailer | 2001 | 2025 | Multi-year |
| FloRacing | Official grassroots racing partner | 2022 | | Multi-year |
| Ford | Official partner | 2001 | 2022 | Multi-year |
| Goodyear | Official tyre | 2000 | 2022 | Multi-year |
| GovX | Official military discount provider | 2024 | | Multi-year |
| Growth Energy | Official partner | 2011 | 2016 | Multi-year |
| Hard Rock Bet | Authorised gaming partner | 2024 | | Multi-year |
| Hilton Grand Vacations | Official vacation ownership provider | 2018 | 2023 | Until 2028 |
| iRacing | Official simulation partner | 2021 | | Multi-year |
| Jack Link's | Official meat snack | 2025 | | Multi-year |
| Liquid Death | Official iced tea partner | 2024 | | Multi-year |
| Mack Trucks | Official haulier | 2016 | 2020 | Multi-year |
| Mechanix Wear | Official high performance glove | 2020 | | Multi-year |
| Mobil 1 | Official motor oil | 2003 | 2017 | Multi-year |
| Monster Energy | Official energy drink | 2017 | 2019 | Multi-year |
| National Debt Relief | Official debt relief partner | 2024 | | Multi-year |
| NetJets | Official private aviation partner | 2017 | | Multi-year |
| Penn Entertainment | Authorised gaming partner | 2020 | 2021 | Multi-year |
| PNC | Official bank | 2018 | 2023 | Multi-year |

| Company | Official designation | Partner since | Latest extension | Duration |
|---|---|---|---|---|
| **Powerball** | Official lottery game | 2023 | | Multi-year |
| **Prevost** | Official luxury motorcoach | 2013 | | Multi-year |
| **Ruoff Mortgage** | Official mortgage partner | 2021 | | Multi-year |
| **Safety-Kleen** | Official supplier | 2004 | 2014 | Multi-year |
| **SiriusXM** | Official satellite radio partner | 2007 | 2023 | Multi-year |
| **Sportradar** | Official data partner, official betting data provider | 2015 | 2023 | Until 2027 |
| **Stratasys** | Official 3D printing partner | 2024 | | Multi-year |
| **Stanley Black and Decker** | Official tool | 2023 | | Multi-year |
| **Straight Talk Wireless** | Official wireless partner | 2024 | | Multi-year |
| **Suburban Propane** | Official propane | 2025 | | Multi-year |
| **Sunoco** | Official fuel | 2004 | 2014 | Ten years |
| **Ticketmaster** | Official technology partner | 2024 | | Multi-year |
| **Toyota** | Official partner | 2003 | 2022 | Multi-year |
| **United Rentals** | Official rental equipment | 2021 | | Multi-year |
| **Universal Technical Institute** | Official partner | 2015 | | Multi-year |
| **Verizon** | Official telecommunications partner | 2020 | | Multi-year |
| **Whelen** | Official vehicle illumination lights | 2004 | 2014 | Multi-year |
| **Xfinity Mobile** | Official wireless partner | 2025 | | Multi-year |
| **Xumo** | Official video and streaming partner | 2025 | | Multi-year |

# BROADCASTERS

## DOMESTIC

| Broadcaster | Territories | Partner since | Latest extension signed | Expiry date |
|---|---|---|---|---|
| Fox | US | 2001 | 2025 | 2031 |
| NBC | US | 2015 | 2025 | 2031 |
| Prime Video | US | 2025 | | 2031 |
| TNT Sports | US | 2025 | | 2031 |

# INTERNATIONAL BROADCAST PARTNERS

| Broadcaster | Territories | Partner since | Latest extension signed | Expiry date |
|---|---|---|---|---|
| **Fox Sports Australia** | Australia | 2024 | | 2025 |
| **SportKlub** | Balkans | 2025 | | Multi-year deal |
| **A1** | Bulgaria | 2025 | | Multi-year deal |
| **Ziggo Sport** | Netherlands | 2022 | | 2025 |
| **TSN** | Canada | 1984 | 2025 | Multi-year deal |
| **Huya** | China | 2024 | | 2025 |
| **iQiyi** | China | 2024 | | 2025 |
| **Saran Media International** | Czechia, Slovakia, Turkey | 2023 | 2024 | 2025 |
| **ArenaTV** | Czechia, Slovakia | 2025 | | 2025 |
| **Mediawan (AB Moteurs/Automoto)** | France | 2023 | | 2025 |
| **SportDigital** | Germany, Austria, Switzerland | 2023 | | 2025 |
| **PCCW** | Hong Kong | 2024 | | 2025 |
| **Arena 4** | Hungary | 2023 | | 2025 |
| **Eurosport** | India | 2025 | | 2025 |
| **Viaplay** | Denmark, Finland, Iceland, Norway, Sweden | 2019 | 2020 | 2025 |
| **Mola TV** | Indonesia, Singapore, Italy | 2023 | | 2025 |
| **Charlton (Sport 1)** | Israel | 2022 | | 2025 |
| **Gaora** | Japan | 2023 | | 2025 |
| **Abema** | Japan | 2025 | | 2025 |

# INTERNATIONAL BROADCAST PARTNERS

| Broadcaster | Territories | Partner since | Latest extension signed | Expiry date |
|---|---|---|---|---|
| **Astro** | Malaysia | 2024 | | 2025 |
| **Dubai Sports** | MENA | 2025 | | 2025 |
| **Fox Sports Mexico** | Mexico | 2022 | | 2025 |
| **Discovery** | New Zealand | 2024 | | 2025 |
| **Tap Media Ventures** | Philippines | 2024 | | 2025 |
| **Motowizja** | Poland | 2023 | | 2025 |
| **Sport TV** | Portugal | 2023 | | 2025 |
| **DAZN** | Spain | 2024 | | 2026 |
| **SuperSport** | Sub-Saharan Africa | 2024 | | 2025 |
| **Sportcast** | Taiwan | 2024 | | 2025 |
| **Mono** | Thailand | 2025 | | 2025 |
| **Premier Sports** | United Kingdom | 2023 | | 2025 |

# INSIGHT

## NASCAR'S US$7.7BN TV DEAL: WHY THE ANNUAL VALUE WENT UP, WHO GETS WHAT, AND THE IMPACT ON FANS




**NBC, Fox, Amazon, and Warner Bros Discovery will split domestic coverage of Nascar between 2025 and 2031 in the stock car racing series' most lucrative media rights deal by annual value in its history. BlackBook Motorsport analyses the key points from the stock car racing series' latest TV contract.**

As the 90s were coming to a close, and Y2K was thought to be on the verge of bringing global economies to their knees, Nascar was beginning to notice the increasing popularity of its races on television.

US viewers have been able to watch every Cup Series race live on TV since 1985, but broadcasters carried out negotiations with track owners for the rights to each event, rather than with Nascar itself.

By the turn of the century – as computers didn't wreak the anticipated havoc – races were split between Paramount's CBS and TNN, Disney-owned ABC and ESPN, Warner Bros Discovery's (WBD) TBS, and Comcast's NBC.

Seeking to capitalise on its new-found popularity, Nascar opted to create a centralised media rights offering in 2001. The new strategy yielded a six-year, US$2.4




billion deal with Comcast, WBD and the then-independent Fox.

Since then, the media rights landscape has evolved rapidly, as evidenced by Nascar's new broadcast deal announced in November 2023, which will generate US$7.7 billion for the series over seven years.

But what does the deal mean for Nascar, its teams, the broadcasters, and fans of the series? BlackBook Motorsport digs into the details of the latest contracts to give its verdict.

## What has been agreed?

NBC, Fox, Amazon and WBD have agreed to split the Cup Series schedule in a seven-year deal running between 2025 and 2031. This means the series not only increases its number of broadcast partners, but it is also set to generate the most annual income from a media rights deal in its history.

The financial terms were not made public, but the new deal is widely reported to be worth US$7.7 billion, working out to an annual fee of US$1.1 billion. This figure includes the US$800 million generated from carving out the second-tier Xfinity Series in a standalone package, which was sold to The CW Network, also for a seven-year period.

For context, the deal with Fox and NBC that expired at the end of the 2024 campaign was worth a combined US$820 million per season over ten years.

From this season, all 38 Nascar Cup Series races will be split between four broadcasters, inclusive of the 2031 season, although this number could fluctuate depending on future calendar changes.

## Who gets what?

### Fox

Nascar's long-time broadcast partner will show 14 Cup Series events from 2025, down from 18 in the previous deal. Events will be available across both Fox and FS1, with the entire 23-race Craftsman Truck Series available exclusively on the latter pay-TV channel.

The deal also includes coverage of practice and qualifying sessions for the Busch Light Clash, the Daytona 500, and the All-Star Race.

## NBC

The Comcast-owned network also receives 14 Cup Series events, down from 20 under its expired contract. However, this deal still includes the postseason schedule, ensuring the Championship Race at Phoenix Raceway remains on NBC for another seven years.

NBC loses the Xfinity Series, which is moving over to The CW Network. The network's multi-platform approach for its Nascar coverage continues, though, with live races and other content available across its flagship NBC channel, USA Network, and the Peacock streaming service.

## Amazon

In a deal that represents Amazon's first foray into live motorsport, as well as Nascar's first partnership with a streaming platform, Prime Video gains the exclusive rights to five Cup Series races from 2025.




Prime Video's contract also includes exclusive coverage of all practice and qualifying sessions from the first half of the Cup Series season, excluding the sessions secured by Fox. All of this content will be available to Prime members in the US, which will sit alongside the upcoming Garage 56 documentary being produced in collaboration with Nascar Studios.

## WBD

TNT Sports also receives five midseason Cup Series races after securing Nascar coverage for the first time since 2014, when it carried a similar six-race package. All races on TNT Sports will also stream live on the B/R Sports add-on on WBD's Max service.

This package also includes all practice and qualifying sessions from the second-half of the season, which will be simulcast on Max and TruTV. It is planned for Bleacher Report to feature Nascar content across its social, digital and mobile platforms.

## Nexstar

The CW Network has not been known for its sports coverage in the past, but new majority owner Nexstar has started to build a small rights portfolio, including LIV Golf and a package of 50 college football and basketball games from the Atlantic Coast Conference (ACC).

The commercial broadcaster's Xfinity Series deal, which was announced prior to sale of the main Cup Series rights, will see the network broadcast 33 live races each year, including all practice and qualifying sessions. All content will be wholly produced by Nascar Productions in close collaboration with The CW Network, and it will include additional viewing opportunities on its digital platforms.

## How has the value increased despite viewership falling?

Interestingly, despite Nascar viewership falling five per cent to 2.86 million viewers in 2023, compared to 3.03 million the previous year, series executives have secured a reported 40 per cent increase in the annual rights fee. This should be viewed as a success, especially

given how much the US media landscape has changed since the previous deal was agreed in 2013.

## So how has it done it?

The number of pay-TV households in the market has dropped from just under 100 million in 2016 to 68.5 million in 2022. As the number of people consuming content via linear platforms shrinks, demand for top-tier live sports that can drive audiences for advertisers is soaring, which is a contributing factor to the price increase in this deal.

Yet Nascar's new agreement also speaks to a wider trend that has seen other US sports properties secure handsome increases for their media rights. Indeed, the series hasn't only added more broadcast partners, but is allowing those networks to air coverage across both their linear and streaming services for a higher price. That means it could potentially broaden the reach of its races while getting paid more in the process.

And even with its falling audience figures, Nascar can still boast strong viewership, especially around marquee events like the Daytona 500. Plus, for all the talk of Formula One's growth in the US, Nascar still has a dedicated following and remains the most-watched motorsport series in the market.

All things considered, despite some concerns, Nascar has secured a good outcome for itself in the current climate.

## Are there any concerns around the deal?

There will be fewer races on network TV, something that will likely be concerning for teams even with the increased revenue they should receive from the deal. Furthermore, the midseason packages carved out for WBD and Amazon will both be locked behind a pay wall, which will be a point of contention for fans.

As greater media rights income is pursued by properties like Nascar, the unfortunate side effect is that this cost will be passed onto consumers. It is now commonplace for rights to be fragmented in this way, but the impact this will have on audience attention is not yet realised.

From the start of this new deal, Nascar fans will need to navigate five broadcasters and up to ten different platforms – whether linear or digital – to watch the entire Cup Series and Xfinity Series seasons. What's more, viewers looking to watch practice and qualifying followed by the race will need to switch between broadcasters for all but three races.

One concern is that casual viewers will lose track of which channels are showing what, while the gap in coverage on Fox and NBC risks inducing a midseason lull from traditional viewers.

## What does the structure of this deal indicate about future developments?

Making predictions about the future of media rights is far from easy, and Nascar's decision to cover all the bases emphasises that rights holders are still trying to strike the right balance between linear and streaming.

The introduction of a company like Amazon may reap rewards, especially since the platform provides an arguably ageing series the chance to market itself to an audience of younger, tech-savvy Prime Video subscribers. But Nascar will need to rely on more than just the five races that will be streamed on the platform to diversify its audience.

Cross-promotion between its new group of partners will be essential, while the marketing campaign that will be built through Bleacher Report will be another crucial aspect for engaging with younger viewers.

It should be noted, though, that Nascar was targeting a single streaming partner for the mid-season package of races. Instead, that ten-race bundle has been split between Amazon and WBD, and falling just short of its target in that regard highlights that the series still had to adapt to secure the financial package it wanted.

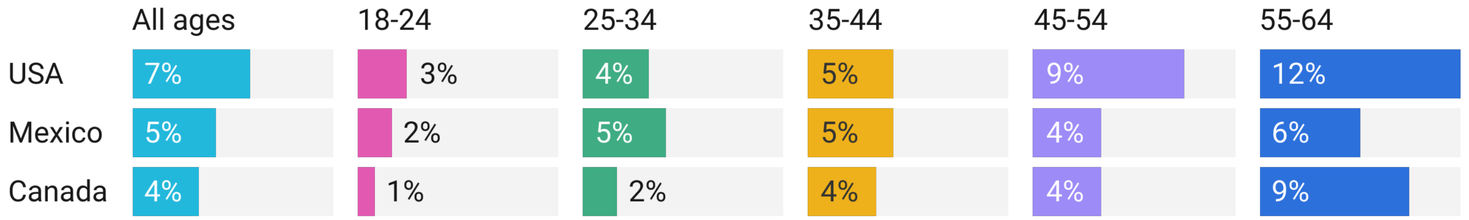
Ultimately, though, it's hard to argue that, for right now, this isn't a good deal for Nascar.




# DATA & ANALYTICS

# CONSUMER

## % OF SPORTS FANS WHO FOLLOW NASCAR BY AGE & COUNTRY




## RANK OF INTEREST AND WILLINGNESS TO PAY (USD) IN NASCAR

| Country | Rank of interest | WTP (US$) | WTP n |
|---|---|---|---|
| **USA** | 23 | 9.41 | 81 |
| **Canada** | 36 | 5.79 | 25 |
| **Mexico** | 39 | 3.08 | 30 |

Source: Ampere Analysis - Sport Consumer Q4 2024

Brought to you by

AMPERE | ANALYSIS

AMPERE ANALYSIS INSIGHT

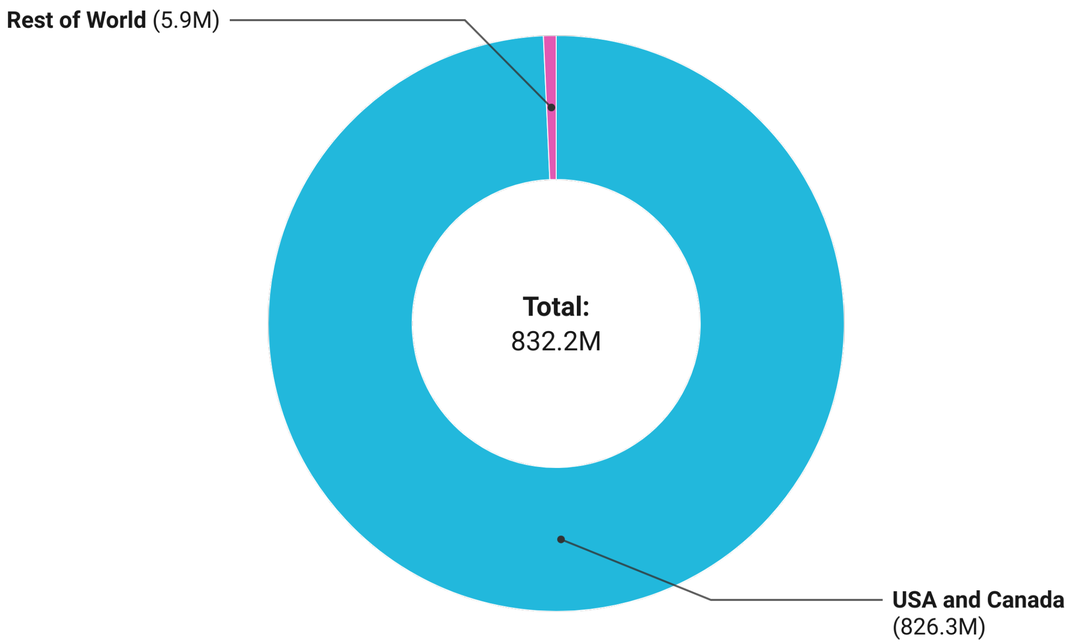
**Nascar is the most popular motorsport in the US and ranks second among motorsports in Canada and Mexico.**

**Willingness to pay to watch Nascar is relatively high in the US (3% of sports fans), with around double the proportion of sports fans willing to pay to watch compared with F1 (1.5%).**

# MEDIA

## GLOBAL VALUE OF TV RIGHTS

All values in US dollars.




Source: Ampere Analysis

Brought to you by

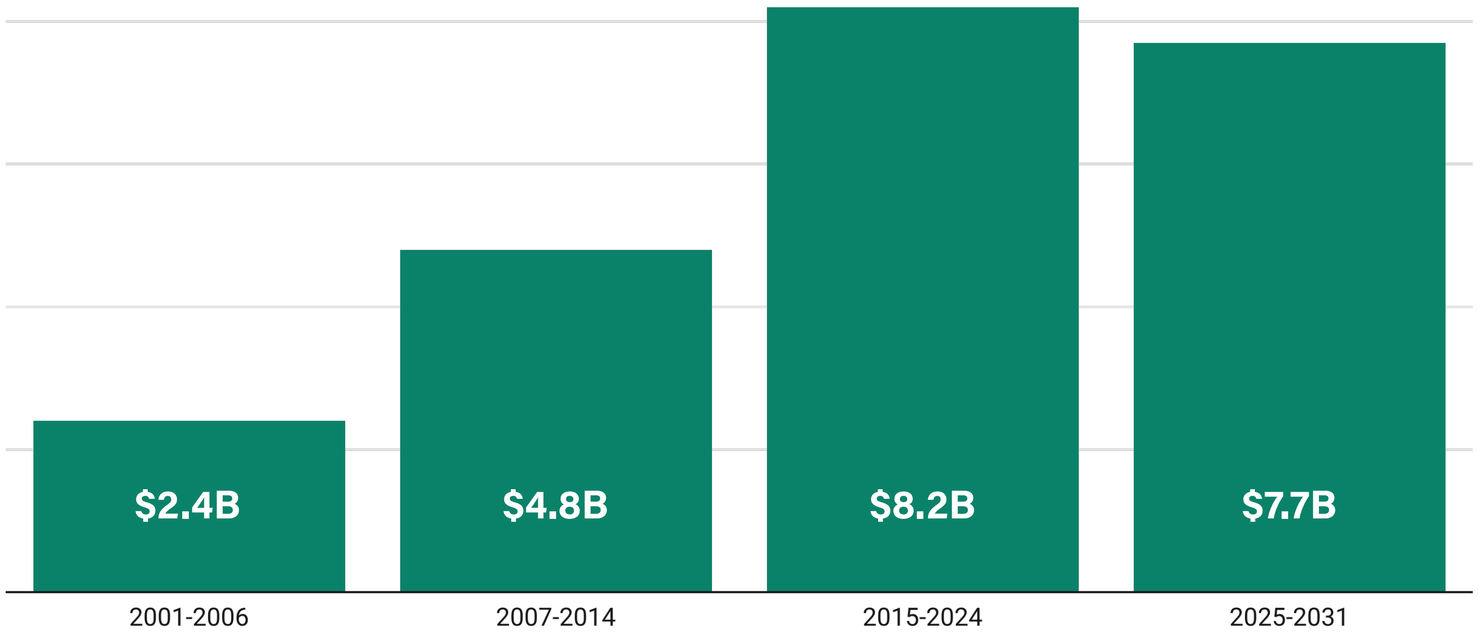
AMPERE | ANALYSIS

AMPERE ANALYSIS INSIGHT

**Nascar is the most popular motorsport competition in the US and the second most valuable series globally in terms of media rights. The value of Nascar is driven almost solely by domestic fandom, with the US being the only market where the proportion of fans willing to pay to watch Nascar (3%) surpassses that of F1 (1.5%).**

# VALUE OF NASCAR MEDIA RIGHTS SINCE 2001

Total value (US$)



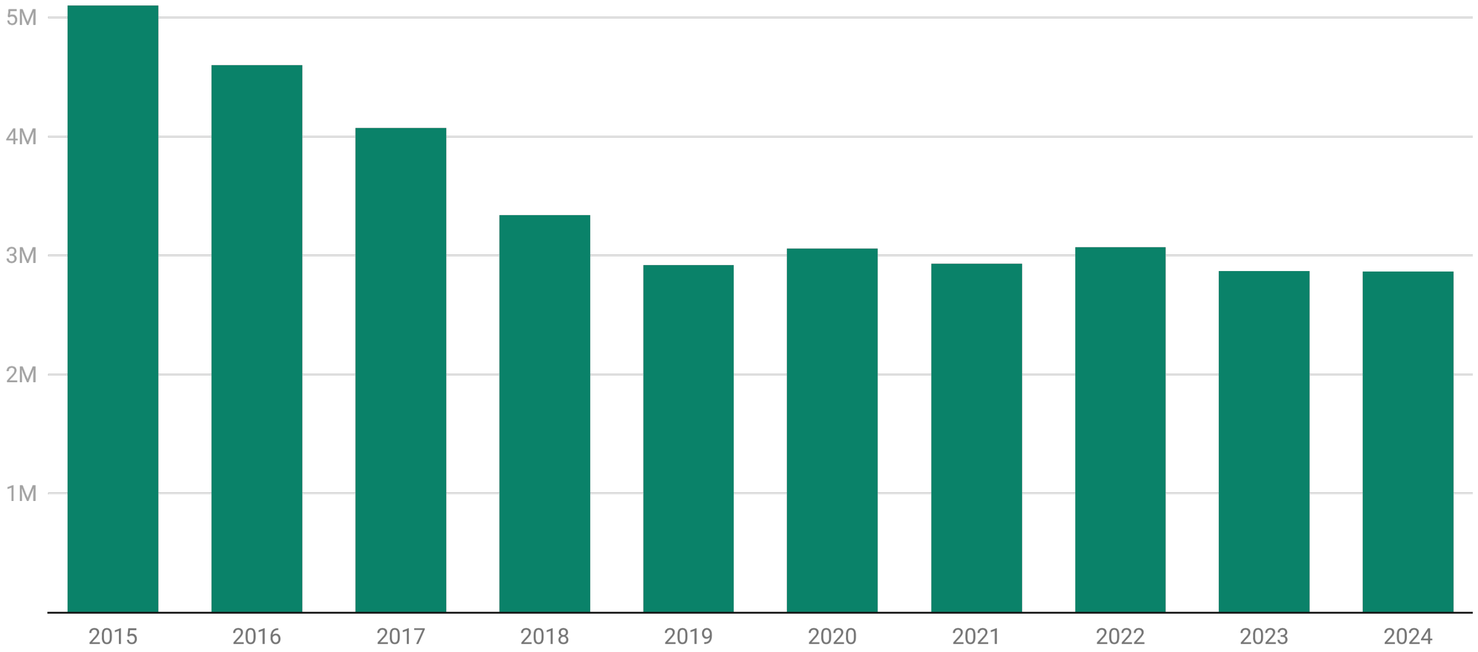

Source: Various

INSIGHT

**The total value of Nascar's new media rights deal may be less than the previous US$8.2 billion contract, but it's spread over fewer years. Until 2031, the stock car racing series has managed to secure over US$1 billion per season.**

# VIEWERSHIP

## NASCAR AVERAGE VIEWERSHIP SINCE 2015



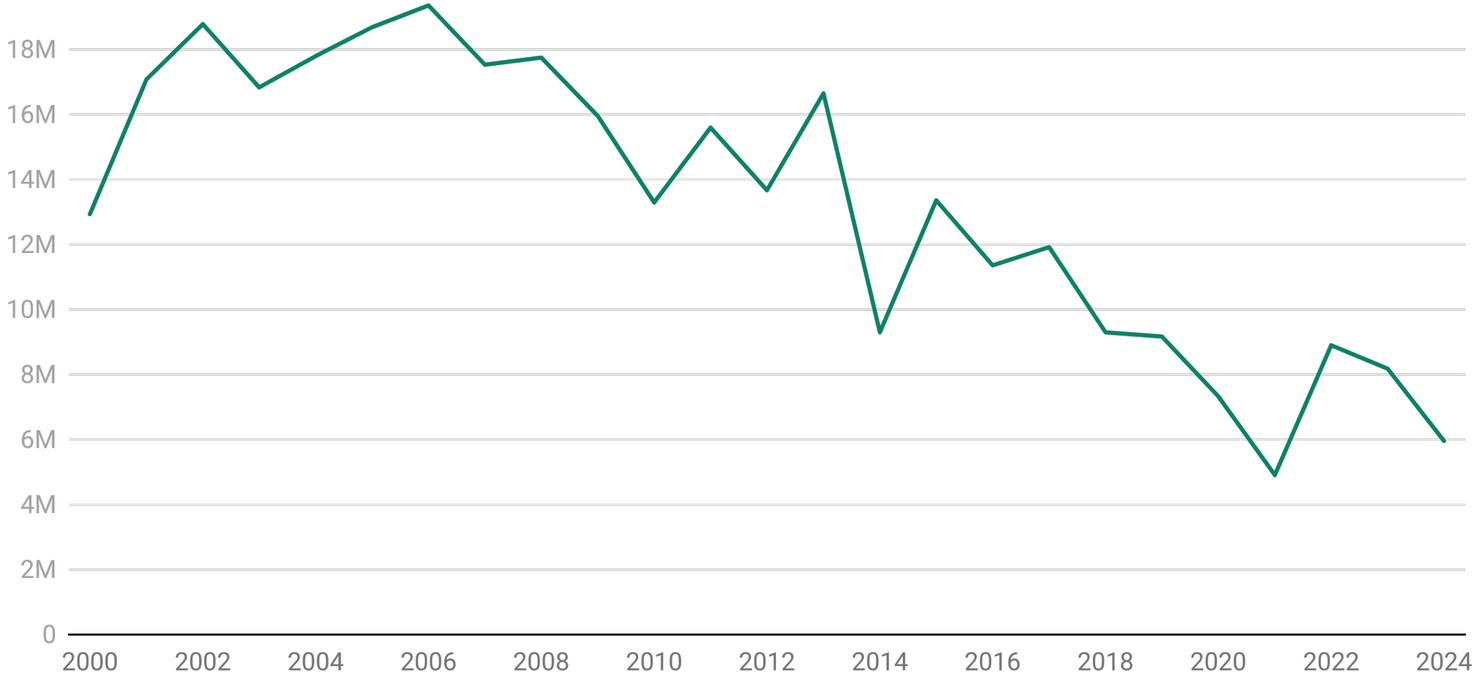

Source: Various

INSIGHT

**2025 is the first year of Nascar's new broadcast contract, which sees coverage split between NBC, Fox, Amazon, WBD, and The CW Network for a total of US$7.7 billion until 2031. But will fans be able to follow easily?**

**After all, Nascar viewers will need to navigate five broadcasters and up to ten different platforms - whether linear or digital - to watch the entire Cup Series and Xfinity Series seasons.**

# DAYTONA 500 VIEWERSHIP SINCE 2000



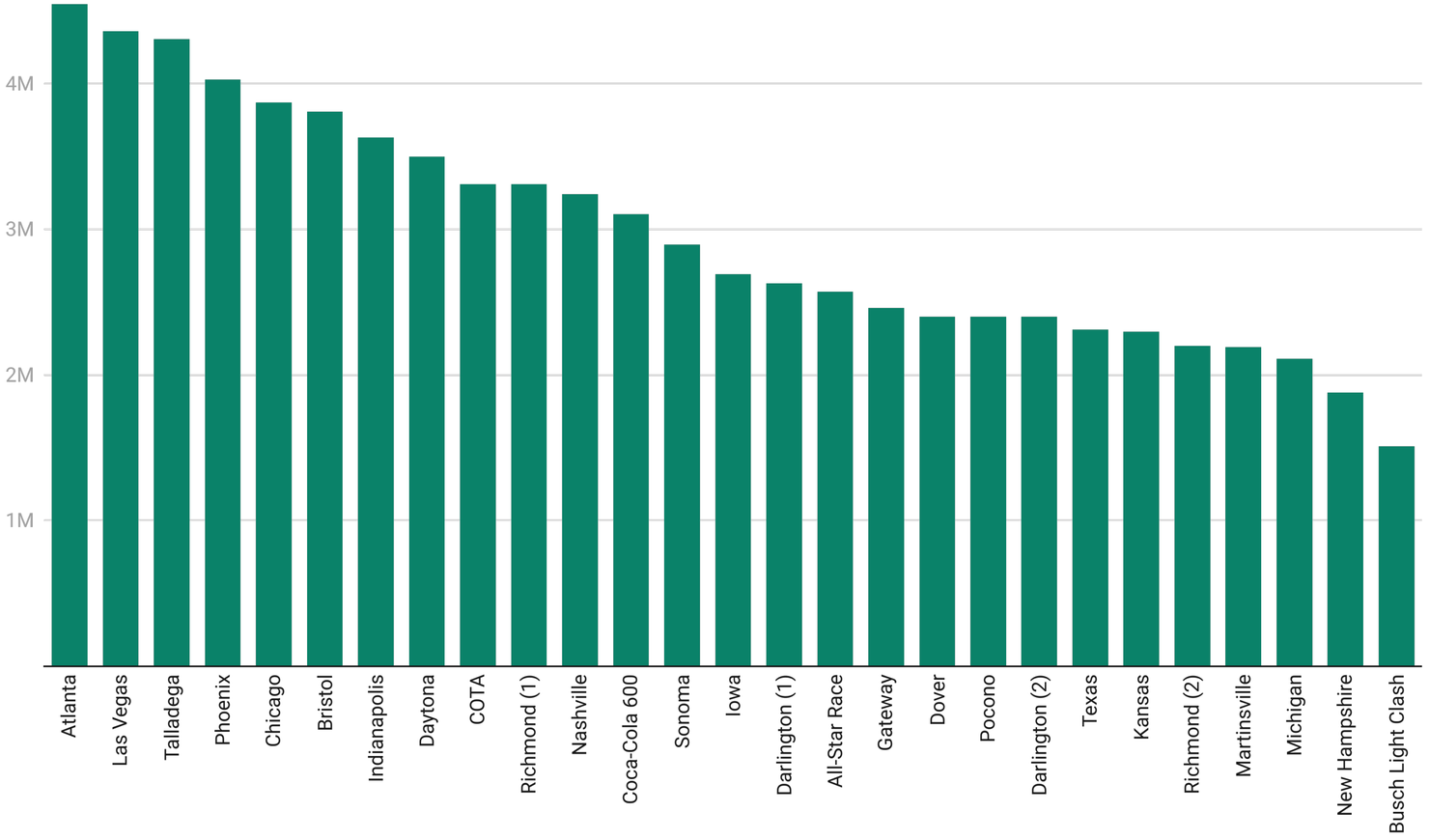

INSIGHT

**Viewership for Nascar's flagship event has steadily declined over the years, but there is important context to last season's poor figures.**

**The 2024 Daytona 500 was severely affected by rain, so viewership suffered greatly. The average audience of 5.96 million was the second-lowest of all time, but overall viewership for the season didn't fall.**

Source: Various

# NASCAR REGULAR 2024 SEASON VIEWERSHIP



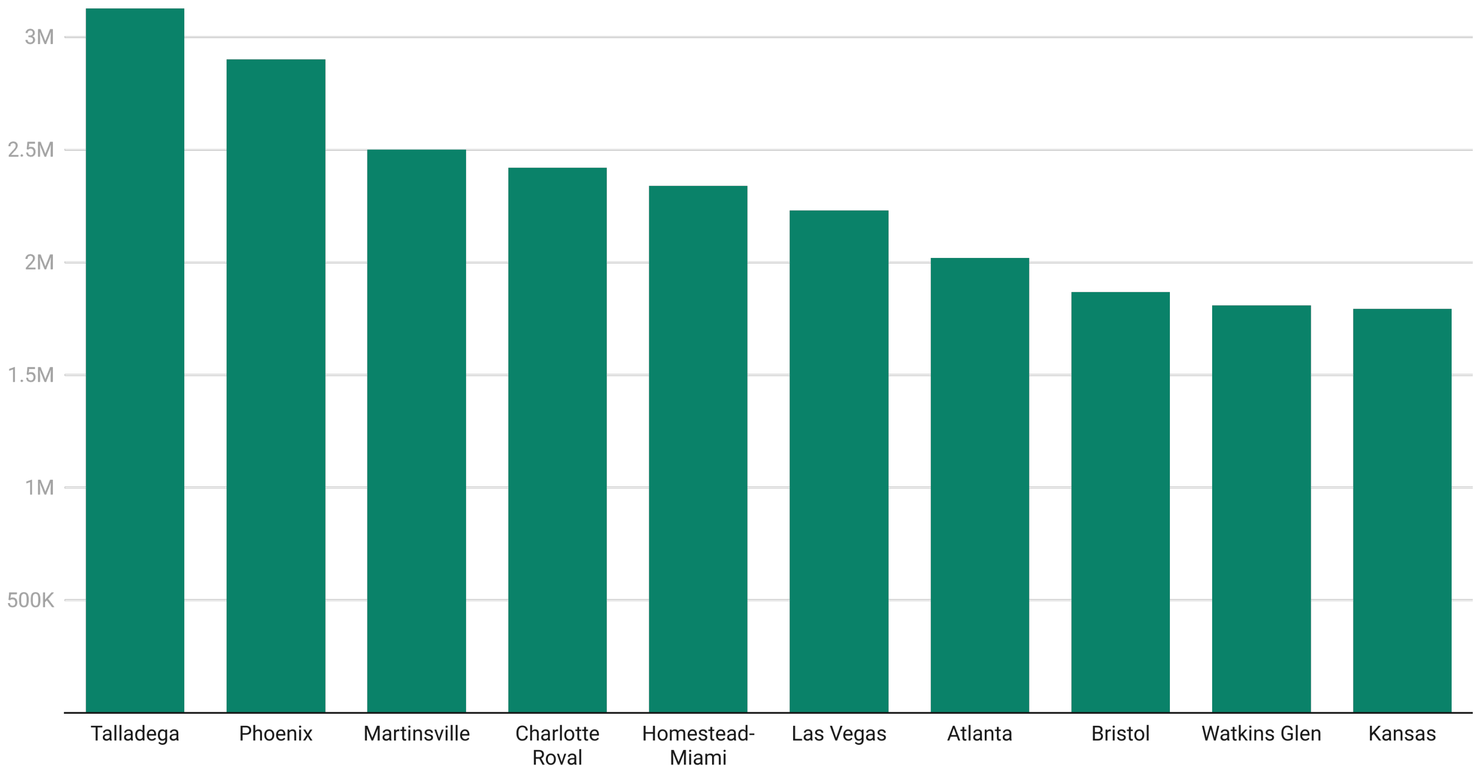

Source: Various

INSIGHT

**Regular season audiences actually increased compared to last season (3.13 million vs. 3.09 million), but the poor performance of the preseason Clash event saw 2024 viewership level with 2023.**

**Highlights included Atlanta (4.55 million), Las Vegas (4.36 million), and Talladega (4.31 million), but the Clash at the LA Coliseum struggled to 1.55 million viewers amid inclement weather.**

# NASCAR PLAYOFFS VIEWERSHIP 2024




Source: Various

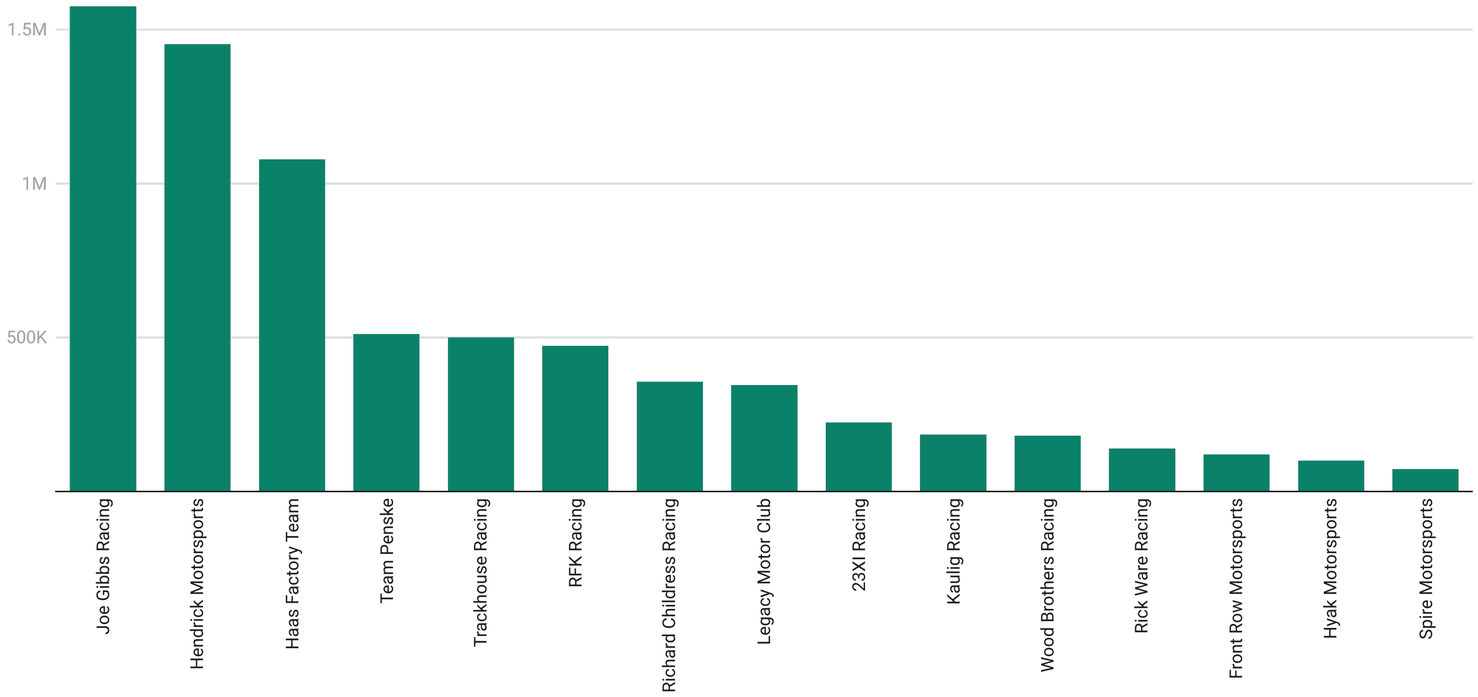
INSIGHT

**The playoffs will continue to be divisive among fans, but postseason viewership increased year-over-year. An average of 2.3 million watched Joey Logano win one of the more controversial Cup Series championships of all time compared to last season's audience of 2.19 million.**

**Notably, Talladega became the most-watched playoffs race since the 2022 championship finale with an average of 3.13 million viewers.**

# SOCIAL

## NASCAR SOCIAL FOLLOWINGS




Source: Various Data collected on 21st January 2025

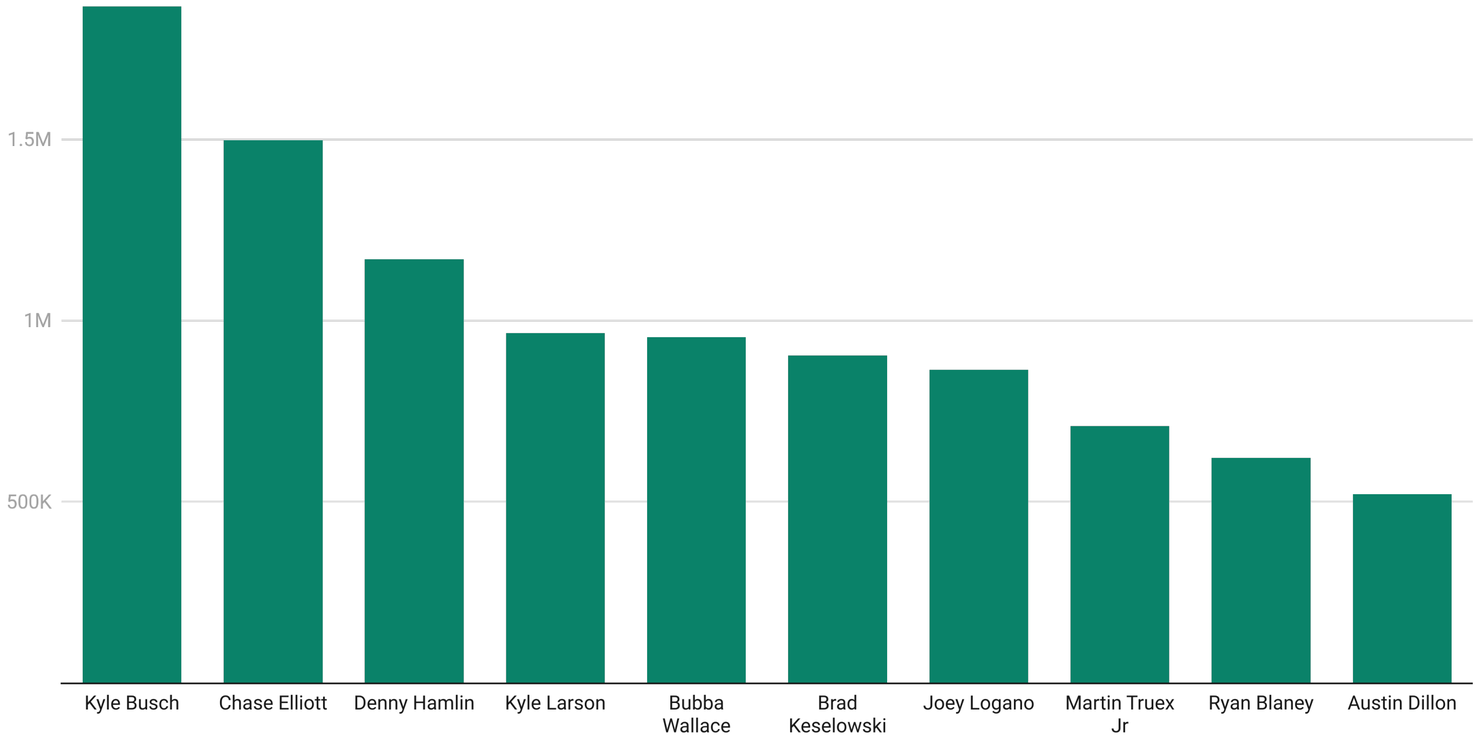
INSIGHT

**Joe Gibbs Racing, Hendrick Motorsports, and the Haas Factory Team are far and away the most popular teams on social media, with over one million followers across X, Instagram and TikTok.**

**Although, the latter benefits from taking over the old Stewart-Haas Racing accounts after the team ceased operations at the end of 2024.**

**Trackhouse Racing, one of Nascar's newest teams, has embraced a fresh approach to the series, and has been rewarded with the second-largest overall following on TikTok.**

# TOP TEN DRIVERS ACROSS SOCIAL MEDIA PLATFORMS




Source: Various

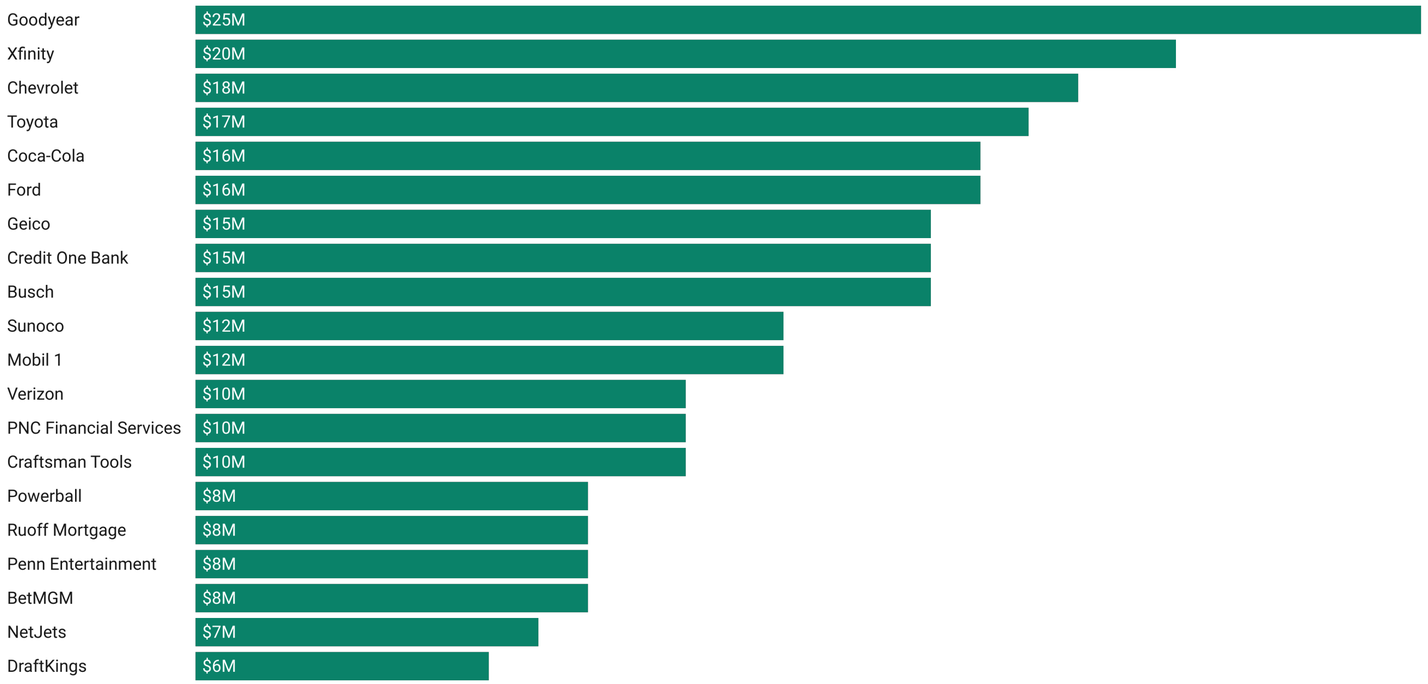
INSIGHT

**Arguably one of the greatest Nascar drivers of all time, it's no surprise to see Kyle Busch with a bigger following than any Nascar team.**

**But this is despite the second-placed Chase Elliott being the winner of Nascar's Most Popular Driver Award for the last seven years running. What's more, Busch didn't finish in the top three in voting last year, with Kyle Larson and Ryan Blaney receiving more votes.**

# SPONSORSHIP

## TOP 20 NASCAR PARTNERS BY SPONSORSHIP DEAL VALUE IN 2024




Source: Forbes

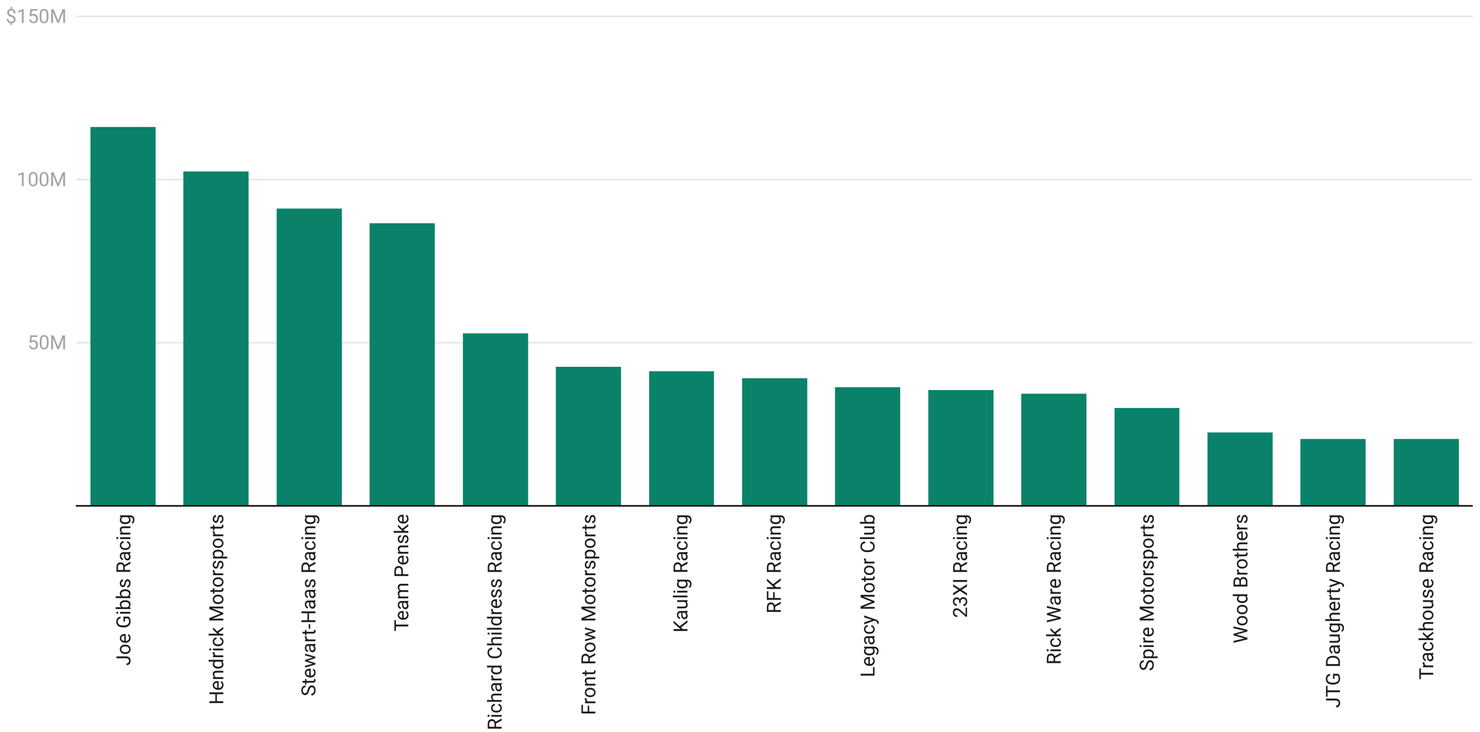
INSIGHT

**Across its 2024 portfolio of sponsors, Nascar was estimated to bring in US$362.34 million in revenue. This is a drop of nearly 16 per cent compared to 2023's figure of US$425.06 million.**

**In 2023, Sunoco contributed the most of any sponsor with an investment of US$26.25 million. Last year, Goodyear led the way with US$25 million and Sunoco dropped all the way to tenth overall (US$10 million).**

# NASCAR TEAM SPONSORSHIP REVENUE COMPARISON

2024 season




Source: Forbes These figures are estimated

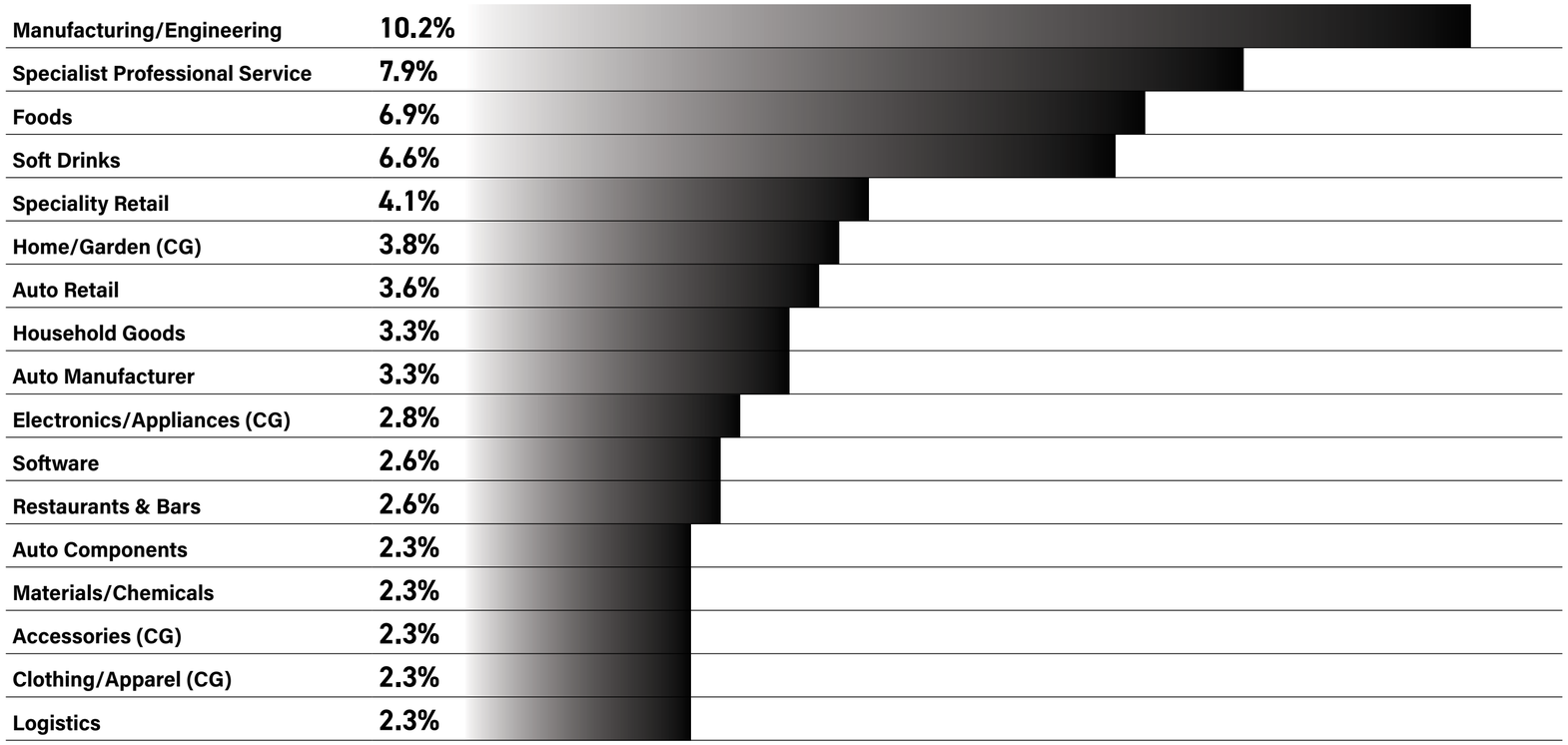
INSIGHT

**In 2023, Team Penske generated the most estimated sponsorship revenue at US$140.94 million, but this fell dramatically last year to US$86.63 million, a drop of nearly 39 per cent.**

**2024 saw Joe Gibbs Racing become the most commercially successful team, generating US$116.09 million in revenue.**

# MOST PREVALENT SPONSORS BY CATEGORY

The chart below shows which categories account for the largest share of sponsors among Nascar teams. E.g. Manufacturing/Engineering firms account for 10.2% of Nascar team sponsors.




Source: Caytooo CG = consumer goods manufacturer

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CAYTOO INSIGHT

**The two most prevalent categories are very much B2B – Manufacturing/ Engineering and Specialist Professional Services – followed by two classic B2C categories, Foods and Soft Drin¹ks.**

**The B2B sponsors are very much 'use-case' partnerships in which the teams use the sponsor's product or service in the running of their organisation. These include the likes of Lincoln Electric, who provide welding equipment to seven teams, and Safety-Kleen, who provide waste management services to six teams.**

**On the other side of the coin, the consumer-focused Soft Drinks category is led by Coca-Cola who sponsor seven of the teams, while Foods is driven by a wide range of snack brands.**

# GAP ANALYSIS OF MOST PREVALENT SPONSORS BY CATEGORY

The chart below shows which categories account for the largest share of sponsors among Nascar teams.
This  table shows which teams do (in red) and don't (in grey) have a sponsor in the most prevalent categories sponsoring Nascar teams.
E.g. 23XI Racing doesn't have a Specialist Professional Services sponsor.



| | Manufacturing/ Engineering | Specialist Professional Service | Foods | Soft Drinks | Speciality Retail |
|---|---|---|---|---|---|
| 23XI Racing | | | | | |
| Front Row Motorsports | | | | | |
| Haas Factory Team | | | | | |
| Hendrick Motorsports | | | | | |
| Joe Gibbs Racing | | | | | |
| JR Motorsports | | | | | |
| JTG Daugherty Racing | | | | | |
| Kaulig Racing | | | | | |
| Legacy Motor Club | | | | | |
| Niece Motorsports | | | | | |
| RFK Racing | | | | | |
| Richard Childress Racing | | | | | |
| Rick Ware Racing | | | | | |
| Spire Motorsports | | | | | |
| Team Penske | | | | | |
| ThorSport Racing | | | | | |
| Trackhouse Racing | | | | | |
| Wood Brothers Racing | | | | | |

Source: Caytoo

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CAYTOO INSIGHT

**The point of a gap analysis is to identify the most prevalent categories among a team's competitive set in which the team doesn't have a sponsor.**

**The idea being that the category overall deems Nascar sponsorship to be an effective marketing channel so it should be easier for any teams missing a sponsor in that category to convince them to come on board.**

**For example, Manufacturing/Engineering firms are the most prevalent sponsors in Nascar. However, Front Row Motorsports, JTG Daugherty, Richard Childress Racing, and Rick Ware Racing don't have a sponsor in this category, so that's where they should prioritise targeting new sponsors.**

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