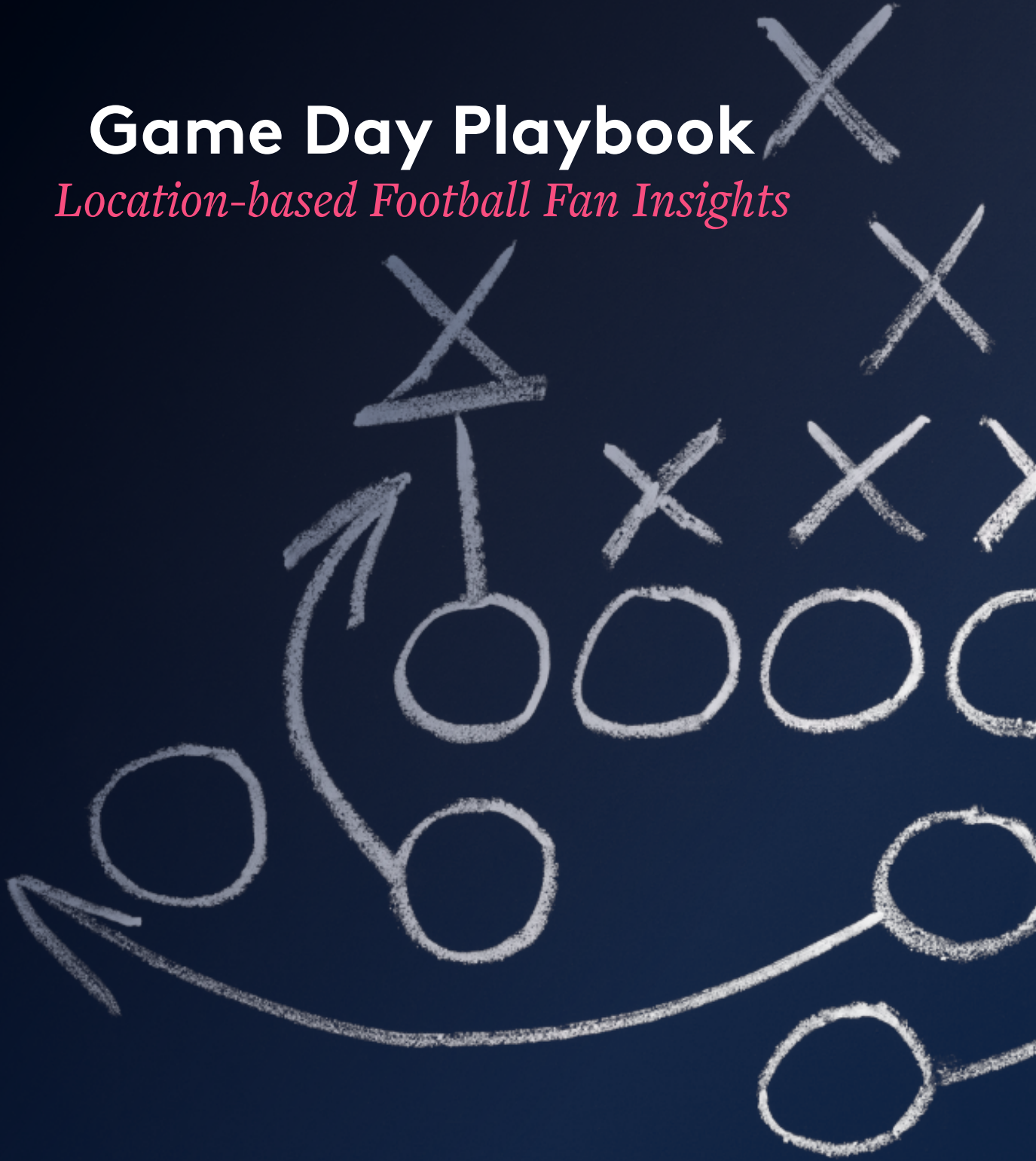


Game Day Playbook

Location-based Football Fan Insights



FOURSQUARE

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Kick Off



Good old, American football. The national pastime engages millions of Americans throughout the fall and winter months, culminating in “The Big Game”, a pivotal cultural moment year after year. Game day also provides a major opportunity for brands and marketers to connect with consumers—according to Nielsen, 113.3M viewers watched the live broadcast in 2017. The competition for audience attention is fierce, with AdAge estimating companies invested \$385M in 2017 game day commercials, and Sports Illustrated affirming even 30-second spots went for as much as \$5.5M a pop.

Nonetheless, as viewer habits change and fans increasingly access content from their mobile devices, broadcast advertising should be seen as one part of a larger omnichannel strategy, rather than the entire play. Whether you’re looking to reach die-hard football lovers or just bandwagon fans, location-based insights can help run your 2018 strategy ahead of the competition.

In this report, you’ll find...

- Behaviors of championship team fans, at-home party hosts, and underdog fans
- The tastes and affinities of game day ticket holders
- Our 2018 Minneapolis city guide
- How tastes differ across NFL team fanbases

Editor’s Note: Throughout this report, we will refer to the NFL’s annual championship game as both the “Big Game” and “game day” interchangeably. **Sources:** Nielsen, AdAge, Sports Illustrated

From the Sidelines

Okay, so we know America is celebrating with football festivities—but how are they doing it? For the full sweep, we dug into our data from the Big Game in 2017, breaking our audience down into three typical profiles: “*Hometown Heroes*” of the featured championship game teams, “*At-Home Hosts*” throwing a party, and “*Underdog Fans*” of teams who didn’t do so well last season.

HOMETOWN HEROES

In 2017, the New England Patriots and the Atlanta Falcons faced off in Houston, Texas. The key takeaway here is playoff excitement + game day thrill = major camaraderie. Hometown Heroes like to celebrate with a ton of bar hopping and viewing parties to support their local superstars.

The Patriots Fan in Boston

Fan Food: Visits to grocery stores were up 14% on the Saturday before the Big Game, compared to a typical Saturday. On the day of the Big Game, they were up 16% over a typical Sunday.

Celebration Station: Foot traffic to liquor stores increased leading up to the Big Game as well. Visits were up 10% on the Saturday prior as compared to a typical Saturday, and up 50% on game day over an average Sunday, marking a 20% average lift for the overall weekend.

Bar Bound: While many fans likely tuned into the game at home, foot traffic to Boston sports bars was also up 24% relative to an average Sunday.

The Falcons Fan in Atlanta

Atlanta Appetite: Visits to grocery stores were up 26% on the Saturday before the Big Game over a typical Saturday. They also jumped 12% for that Sunday, marking an 18% overall lift for the entire weekend.

Falcon Frenzy: Liquor store traffic was also up 27% over a typical Saturday. On the day of the Big Game, liquor store traffic jumped 42% over an average Sunday, and during the overall weekend, visits to liquor stores increased by 30%.

Toss it Back: Foot traffic to Atlanta sports bars was up 20% for game day, relative to an average Sunday. The weekend overall had a 5% lift, due to a low performance on Saturday, potentially as fans started to party prep.

WINNING PLANS

According to the NRF, 43.3 million fans planned to throw a party for the Big Game in 2017, while another 70 million planned to attend a viewing party hosted by friends or relatives. Total party spending in 2017 was estimated at \$15.5 billion.

AT-HOME HOSTS

Consumers love entertaining for the Big Game, often stocking up on food and drinks in advance. We examined game day foot traffic to various categories as well as the “prep” day before to see how hosts prepare—and let’s just say they don’t like hungry (or thirsty) guests

Cheers for Comfort: Most viewers across the nation may prefer to watch at home. Visits to sports bars across the nation were down by an average of 2% on game day compared to the average Sunday.

Hostess Hustling: Across the nation, foot traffic to grocery stores (and supermarkets) increased by an average of 14% on the Saturday before game day, compared to an average 2017 winter Saturday.

Popping Bottles: As for At-Home drinks, we saw national foot traffic to liquor stores on game day increase by an average of 16%.

THE UNDERDOG FANS

We looked at cities with worst performing teams in the league last season, the Chicago Bears, the San Francisco 49ers, and the Cleveland Browns—to see what their fans did on game day. While they still celebrated the Big Game, it was with less fervor.

Just a Snack: Grocery store foot traffic in these cities was up only about 11%, compared to the cities average of a 14% lift on the Saturday before the Big Game over the average 2017 winter Saturday.

Gonna Pass: Game day visits to liquor stores in these cities were down 2% compared to the cities average for a 2017 winter Sunday, and visits sports bars were down 7%, respectively.

Editor’s Note: For our “Hometown Heroes” analysis, we examined venues in the cities of each playing team and identified performance per category on the Saturday before the Big Game as well as on game day, relative to a benchmark Saturday or Sunday in Q1 2017. For our “At-Home Hosts” analysis, we examined foot traffic to each category across the nation on game day as well as the day prior, comparing it to an average Saturday or Sunday in Q1 2017. For our “Underdog Fans” analysis, we examined foot traffic to each category in Chicago, San Francisco, and Cleveland on game day as well as the day before, compared to an average Saturday or Sunday in Q1 2017. Our mention of “fan” or “fans” refers to users in those markets. **Source:** NRF

Throw a Hail Mary

For those fortunate enough to score tickets to the Big Game, there's a ton of fun to be had in addition to watching the ball. We dived head first into last year's game day in Houston, Texas on February 5th; to inform you of what attendees typically like to do during their trip.

ASK THE FOURSQUARE PRESS: THE 101 ON GAME DAY ATTENDEES

Q: Who attended the Big Game?

A: Besides being football fans, tourists who traveled to Houston for the Big Game were also **general sports fans**, 3x more likely than the average consumer to frequent basketball stadiums, 5.5x more likely to visit soccer stadiums, 2.3x more likely to visit baseball stadiums, and 1.9x more likely to visit hockey arenas. They're also **frequent travelers** both for business and pleasure—and are 2.3x more likely to be found at airports, 2.4x more likely to be at hotels, and 2.2x more likely to be found at convention centers.

Q: When did game day attendees arrive and leave?

A: Tourists for the Big Game began trickling in as **early as Monday and Tuesday** before showtime, but the majority flooded into the host city on Thursday and Friday, when visits to Houston hotels began to climb. Houston airports also saw a **noticeable bump on Friday**, as fans flew in for the exciting weekend.

Q: What happened the morning after the Big Game?

A: The Monday morning after the Big Game, most attendees grabbed a bite at a **coffee shop or breakfast spot** before heading to the **train stations or airports** to head home. Visits to Houston airports spiked on that day as well with so many exits, as compared to the rest of the game day week.

Editor's Note: We examined the behavior of consumers who traveled over 150 miles from home to Houston and checked in at NRG Stadium at the time of the Big Game, to analyze the times and types of venues they visited while in town.

Q: What else did they do while in town?

A: Saturday is by far the biggest drinking night, with visits peaking to **bars, lounges, and nightclubs** as fans loosened up the night before. On Sunday, the 6:30PM kickoff time still leaves plenty of time to check out some local events heading into the stadium. Before the game, we saw an increase in visits to **convention centers, event spaces, and concert halls** for the many sponsored events during the day leading up to kickoff. We also noticed a lift in foot traffic to barbeque joints, as fans got a taste of the **local flavor**. After the Big Game, some folks headed straight back to their hotels for the night, while others headed out to the bars to celebrate.

Q: Where did the attendees mostly come from?

A: The top cities attendees traveled from are:

New York, NY
Atlanta, GA
Los Angeles, CA
Boston, MA
Dallas, TX
San Francisco, CA
Tampa, FL
Washington, DC
Chicago, IL
Miami, FL



2018 Minneapolis City Guide

Time to gear up for *Minnesota nice*. This year's game day will be in Minneapolis, Minnesota on February 4th, 2018. **Foursquare City Guide** can help users discover the best places in town, whether visiting for the Big Game or just a weekend trip—take a look at the top spots below.

TO EAT AND DRINK:

Al's Breakfast
Peace Coffee Shop
Pizzeria Lola
Matt's Bar
Patisserie 46
Tattersall Distilling
Butcher & the Boar
Sun Street Breads
Zen Box Izakaya
Revival
Bar La Grassa
Izzy's Ice Cream
Marvel Bar

TO SEE AND DO:

Stone Arch Bridge
Mill City Museum
Minnehaha Falls
Riverview Theater
Loring Park
Walker Art Center

MINNEAPOLIS TOP FOOD & DRINK TASTES

"Juicy Lucy" burgers, bison burgers, cheese curds, walleye sandwiches, tater tots, cheese wontons, bratwurst, pho, banh mi, dark beers, craft beer, stout beer, milk stout, local beer, pale ales, cider, IPAs, PBRs, speakeasy cocktails, whiskey, scotch, brunch cocktails, and bloody marys.

Editor's Note: Categories, chains, visits, and tastes are based on local foot traffic patterns as well as user generated data from consumers in Minneapolis.

Special Teams

When it comes to targeting, regional differences matter. Our extensive taste database allows us to home in on exactly what fans of each NFL team like to eat and drink, priming businesses to truly understand audiences near or far.

AFC

NEW ENGLAND PATRIOTS
Lobster rolls, beef tips, harpoon IPA, blueberry beer, steak tips, clam chowder, sticky buns, and poutine

BALTIMORE RAVENS
Crab cakes, shrimp, steak subs, oysters, tater tots, pizza subs, fried oysters, and draft beer

BUFFALO BILLS
Fish fry, buffalo wings, hoagies, pizza subs, stuffed peppers, roast beef, italian sausage, martinis, and stout beers

MIAMI DOLPHINS
Cuban food, fried plantains, arepas, rum cocktails, skirt steak, yucca fries, stone crabs, ceviche, serrano ham, and chorizo

KANSAS CITY CHIEFS
Barbeque, nachos, whiskey, dark beer, burnt ends, cheesy corn, and baked beans

CLEVELAND BROWNS
Corned beef, dark beers, hot dogs, pretzels, stout beers, tater tots, brownies, bratwurst, reuben sandwiches, and pale ales

CINCINNATI BENGALS
Steak hoagies, turkey clubs, pretzels, bourbon, craft beer, chili, draft beer, club sandwiches, macaroni & cheese, and waffles

INDIANAPOLIS COLTS
Shrimp cocktail, pork tenderloin, local beer, pulled pork, craft beer, dark beer, nachos, tamales, and biscuits

DENVER BRONCOS
Bison beer, infused vodka, PBR, green chili, mimosas, dark beers, burritos, chili, pale ales, and milk stout

HOUSTON TEXANS
Crawfish, tacos, margaritas, shiner beer, crawfish, fajitas, gumbo, migas, enchiladas, tacos, po'boys, and seafood gumbo

NFC

PHILADELPHIA EAGLES
Buffalo chicken cheesesteaks, tomato pie, cheesesteak pizza, Italian hoagies, double IPA, pizza fries, and craft beer

WASHINGTON REDSKINS
Crab dip, pretzels, Irish beer, bloody marys, crab cakes, bourbon, oysters, and steak frites

DETROIT LIONS
Corned beef sandwiches, catfish, chili fries, rib tips, steak bites, chili cheese fries, chicken gyros, and coleslaw

GREEN BAY PACKERS
Cheese curds, bratwurst, porter, Scotch ale, fried fish, and bloody marys

ATLANTA FALCONS
Cheese grits, fried green tomatoes, jerk chicken, PBR, margaritas, biscuits, turkey burgers, chicken & waffles, and mimosas

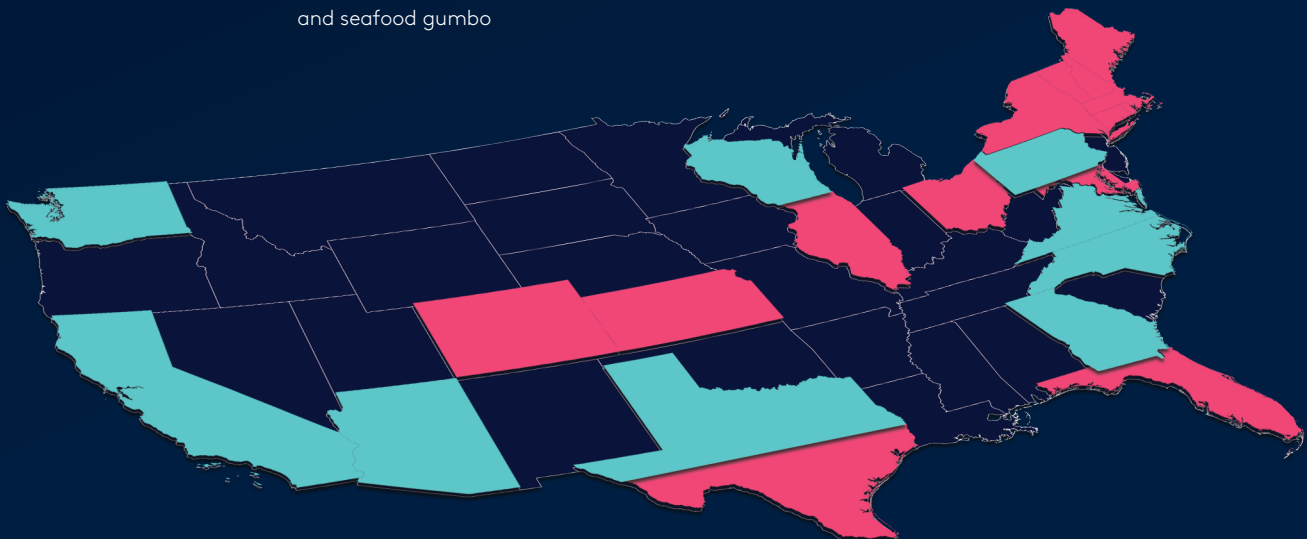
CAROLINA PANTHERS
Fried pickles, draft beer, grits, chicken wings, country ham, barbeque sandwiches, biscuits, and cornbread

SEATTLE SEAHAWKS
Dungeness crab, wheat beer, seafood chowder, oysters, cider, and whiskey

SAN FRANCISCO 49ERS
Irish coffee, garlic fries, burritos, seafood chowder, oysters, whiskey, deviled eggs, catfish, and braised pork

ARIZONA CARDINALS
Quesadillas, macaroni & cheese, margaritas, burritos, crab puffs, horchata, enchiladas, and carne asada

DALLAS COWBOYS
Brisket tacos, shiner beers, migas, chicken fried steak, tacos, tex-mex, mimosas, margaritas, and crawfish



Editor's Note: Taste affinities were determined by self-selected and machine-learned tastes from Foursquare City Guide users in select markets.

Let's See the Replay



Whether you're a brand targeting fans en route to the game, a retailer looking to drive store visits, a restaurant tailoring menu offerings, or a financial services company providing sporting event rewards—Foursquare can help your business succeed with a media strategy based on location-based insights.

How can my business best target desired audiences?

AUDIENCE SEGMENTATION: Identify fans who attend the game, those who watch at bars or restaurants, and those who host parties at home. Tailor messaging to viewers' behaviors and affinities.

How can my business connect with sports fans?

MOMENT-BASED MESSAGING: Connect with fans in real-time at the places they visit before, during, and after the game—and stay with them long after they leave the bar or party.

How can location insights impact my business offerings?

UNDERSTAND REGIONAL NUANCES: Our 100K+ global tastes provides us access to what fans like in different cities, informing enticing menu offerings or relevant messaging.

How can my business make the most impactful advertising decisions?

MEASURE IMPACT: Monitor how sponsorships and cross-platform advertising are driving visits (and from what type of consumers), optimizing campaign performance.

LEARN MORE

Dive deeper into the patterns and preferences of fans of a specific team with our NEW Sports Fan Insights Package.



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