



FSQ x Inscape Understanding COVID-19's Impact On NFL Fans

Overview

The 2020-2021 football season was a season like no other. COVID-19 restrictions around stadium attendance change day-by-day, team-by-team. Meanwhile, sports bars have been limited to outdoor dining and delivery, preventing fans from gathering at local watering holes to cheer on their teams. While fans can still catch the game from the comfort of their own homes, NFL ratings are down.

TV viewership trends can tell marketers a lot about consumer behavior. Indeed, by combining TV viewership data with location data, it's possible to quantify the relationship between TV viewership and foot traffic to physical locations (for example, people who watched football on TV between September - November 2020 are 43% more likely to have visited an Albertsons grocery store since the pandemic began).



Overview & Methodology

Foursquare analyzes foot traffic data from millions of Americans who make up our first party panel.

For this analysis, we combined visitation data with TV viewership data from Inscope, VIZIO's data product with insights from 16+ million opt-in TVs across America.

All data is either anonymized, pseudonymized or aggregated, and is normalized against U.S. Census data to remove age, gender and geographical bias.

We focused on the top 20% of viewers for NFL programming, to remove more occasional or casual viewers, focusing on behaviors from March through December 2020.



How can we use these two types of data to learn about the relationship between football fan viewing habits in real world activity?

Here's What We Learned

1

Surprisingly, football fans who frequently watched NFL games on TV were actually **more 'out and about'** than those attending games 'IRL'.

2

Football fans are less likely to **travel** to away games since the pandemic began.

3

Both NFL game attendees and at-home viewers are more likely to engage in **nightlife activities** than the average American since the Pandemic began.

4

2020 Football stadium-goers are skewing **younger** to 2019 fans.

Football fans who frequently watched games at home were actually more 'out and about' than those attending games 'IRL'.

Foot Traffic To **Shops & Services** Has Continued To Pick Up More Amongst NFL TV Viewers Compared To The General Population Since the Pandemic Began

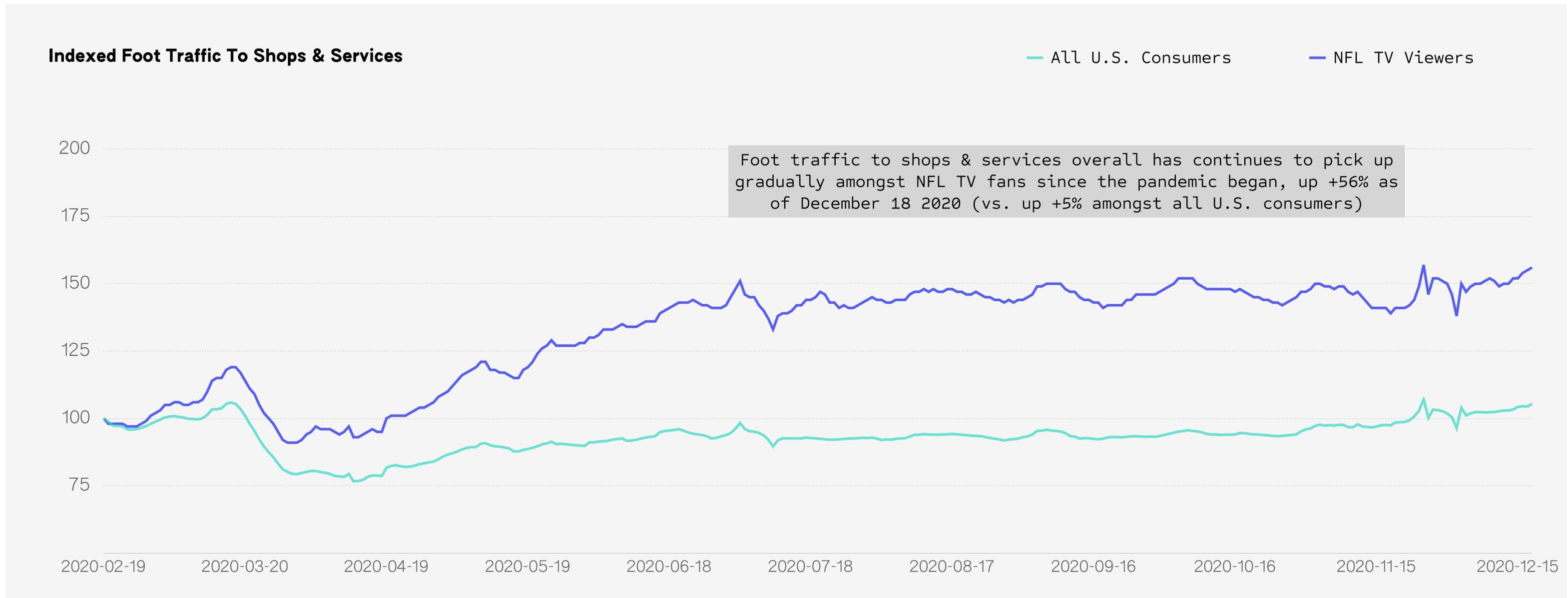


Chart illustrates indexed foot traffic to shops & services, where visits on February 19, 2020 is 100. We've used rolling 7 day averages to account for fluctuations by day of the week.

Foot traffic To **Non-Essential Businesses** Remains Elevated Amongst 2020 NFL TV Viewers Since The Pandemic Began

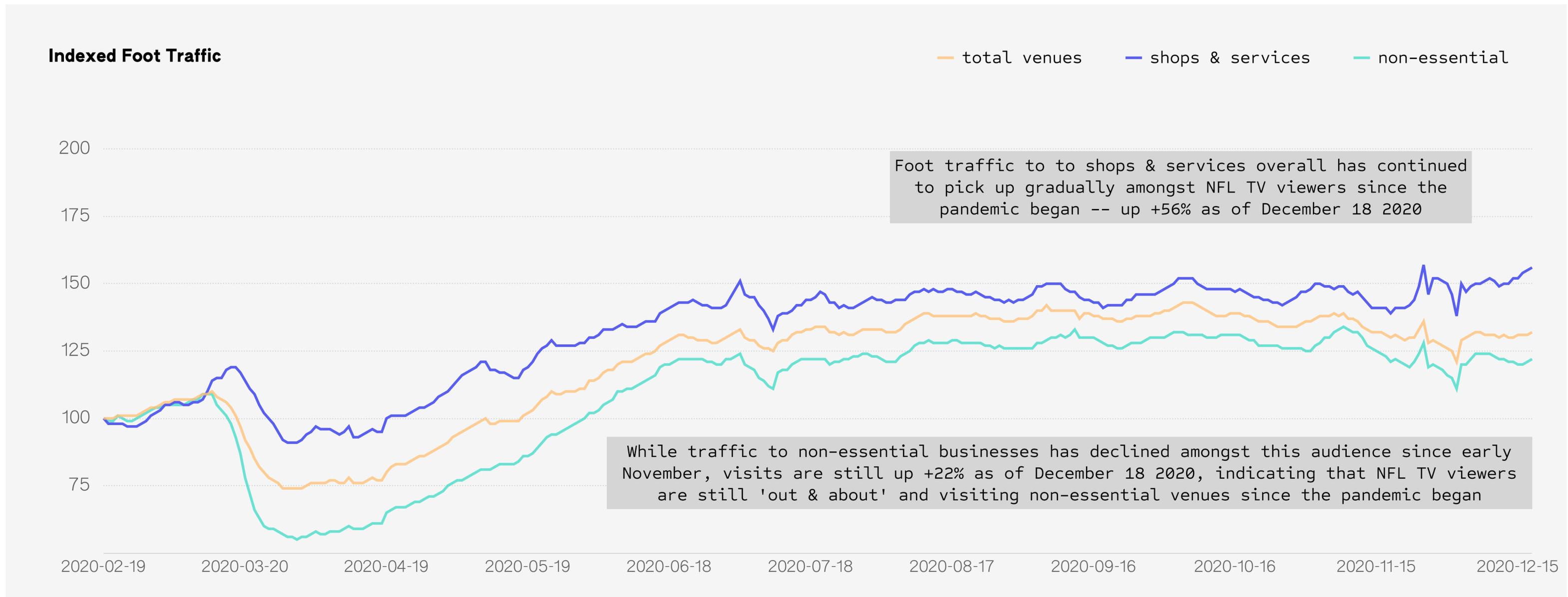
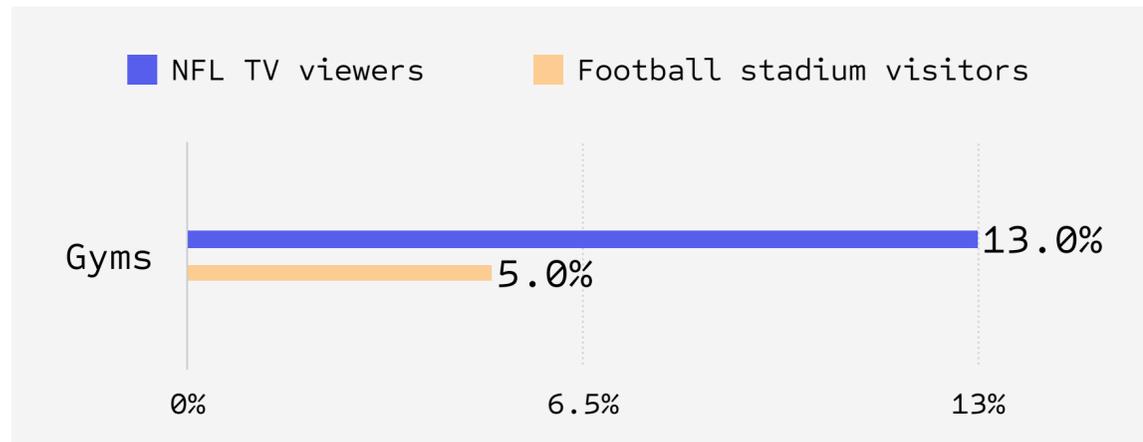


Chart illustrates indexed foot traffic amongst NFL TV Viewers, where visits on February 19, 2020 is 100. We've used rolling 7 day averages to account for fluctuations by day of the week.

At-Home Football Fans Are Still Keeping Fit At The Gym

In fact, these fans are even more likely to visit gyms & fitness centers than those attending football games 'IRL' since the pandemic began.

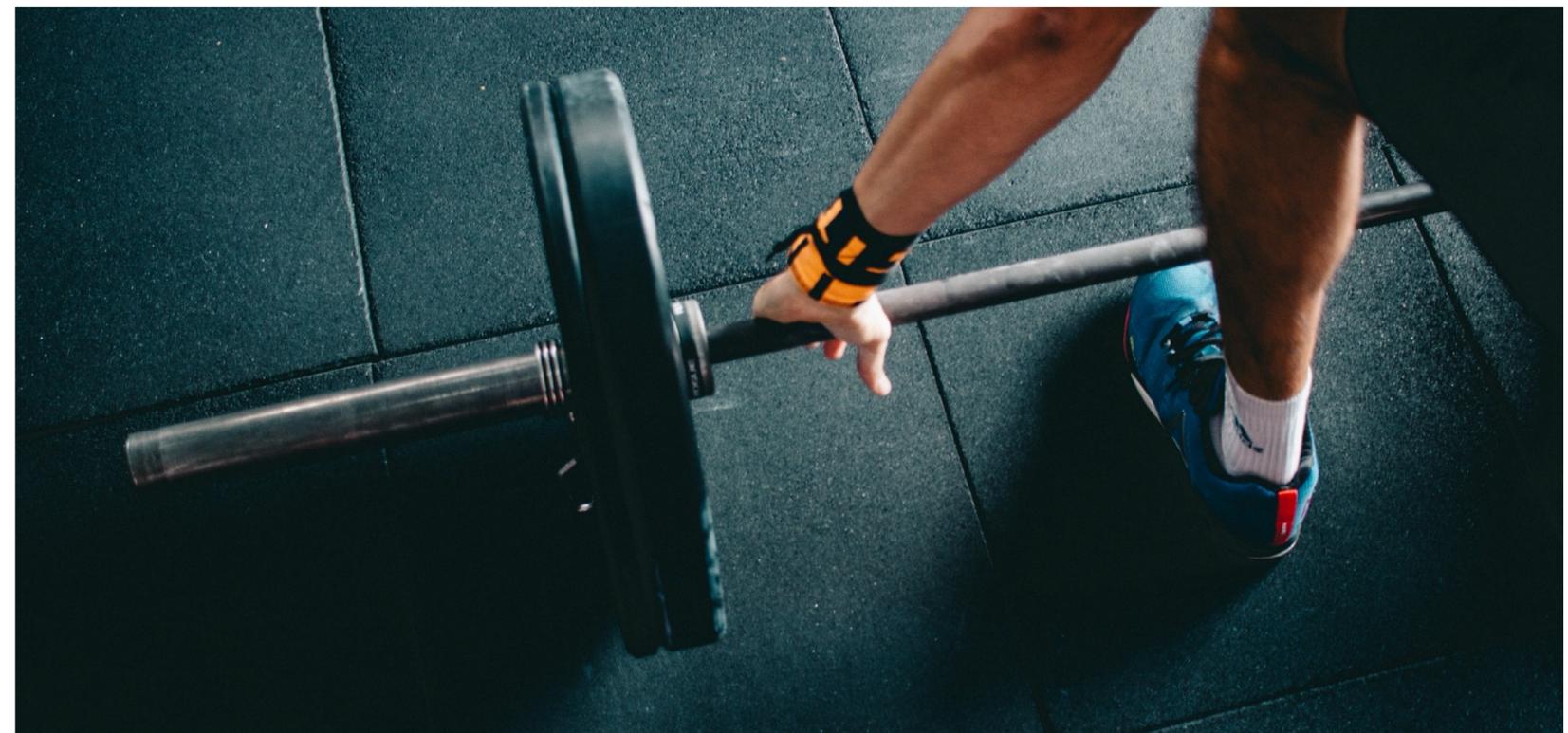


Compared to the average American, these consumers are more likely to visit gym & fitness center chain like:

24 HOUR FITNESS +40%

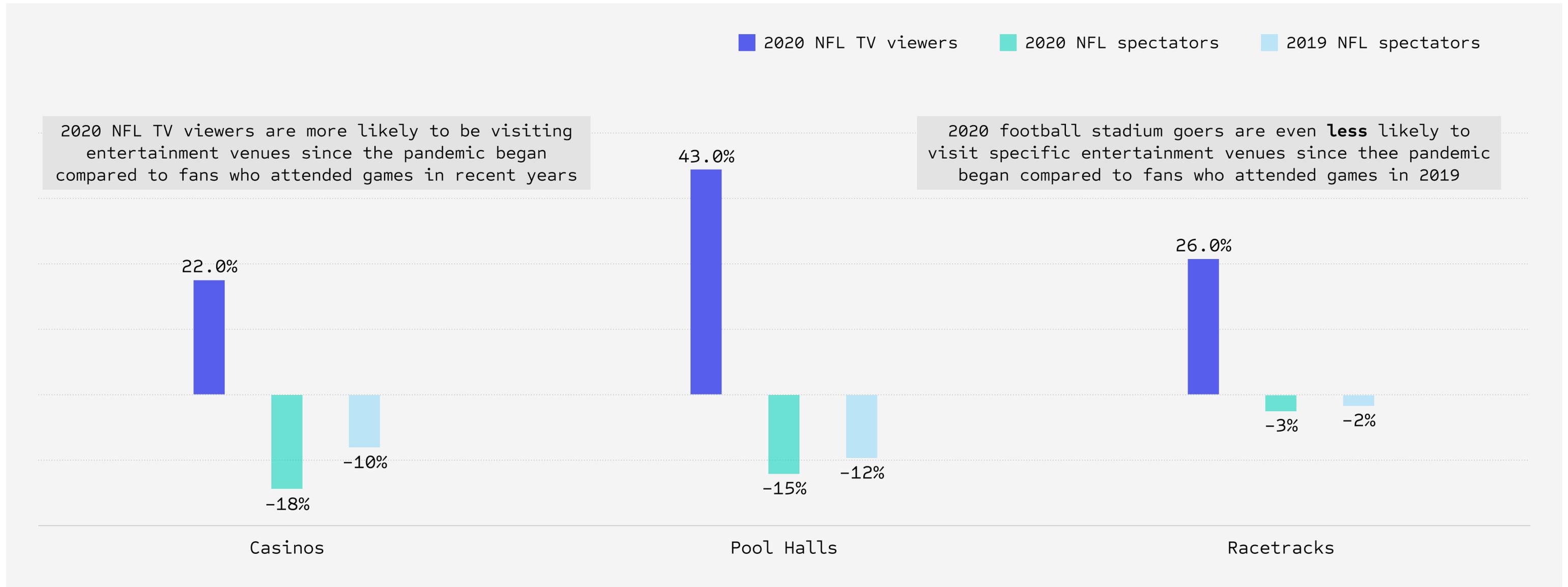
LA Fitness +19%

YMCA +11%



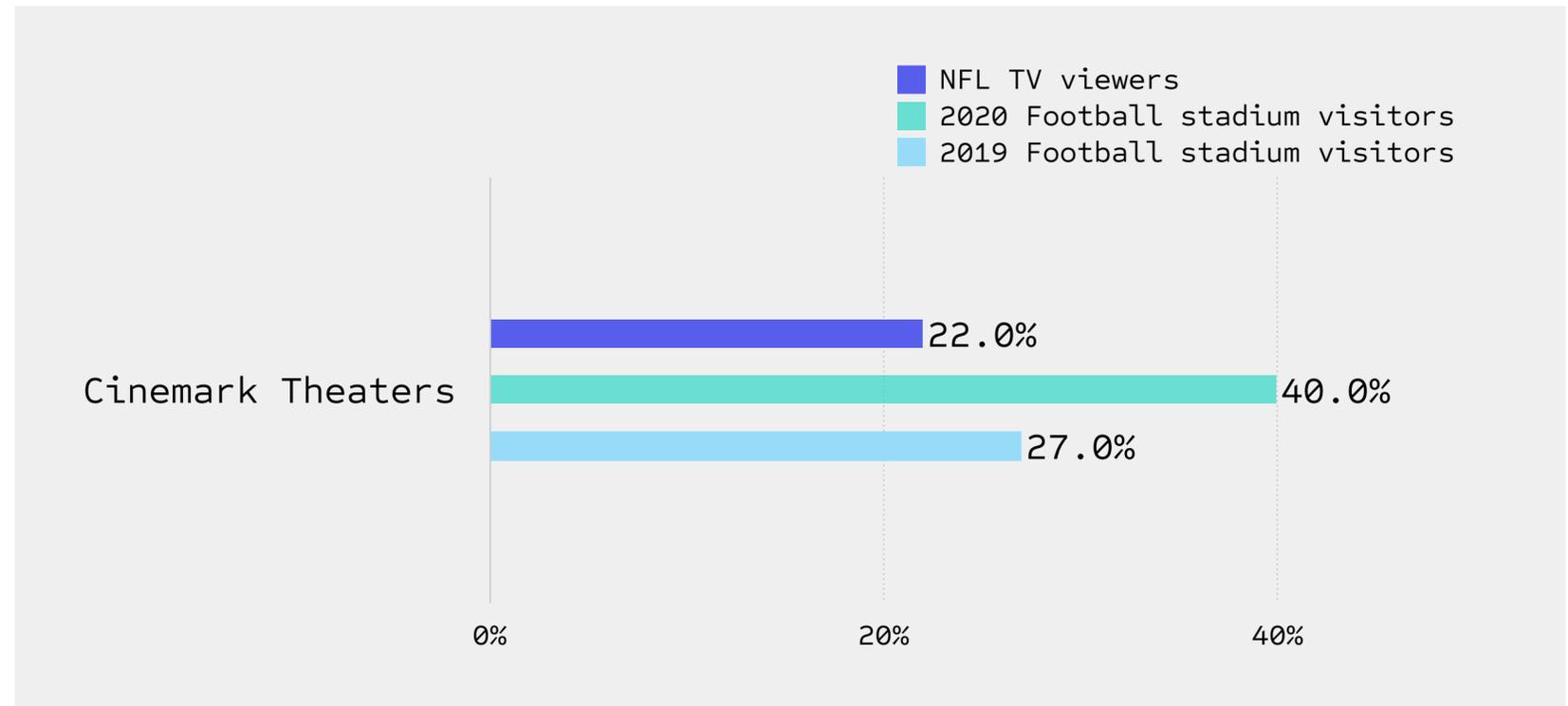
Foursquare data from 2019; indexes indicates % more likely to visit a given place after Brand A location than the average US consumer

At-Home Football Fans Are More Likely to Frequent **Entertainment Venues**



All Football Fans Are Still Visiting Movie Theaters

While streaming services continue to thrive throughout the pandemic, all football fans (including both game attendees and TV viewers) are still more likely to catch the latest releases on the big screen vs. watching at home.

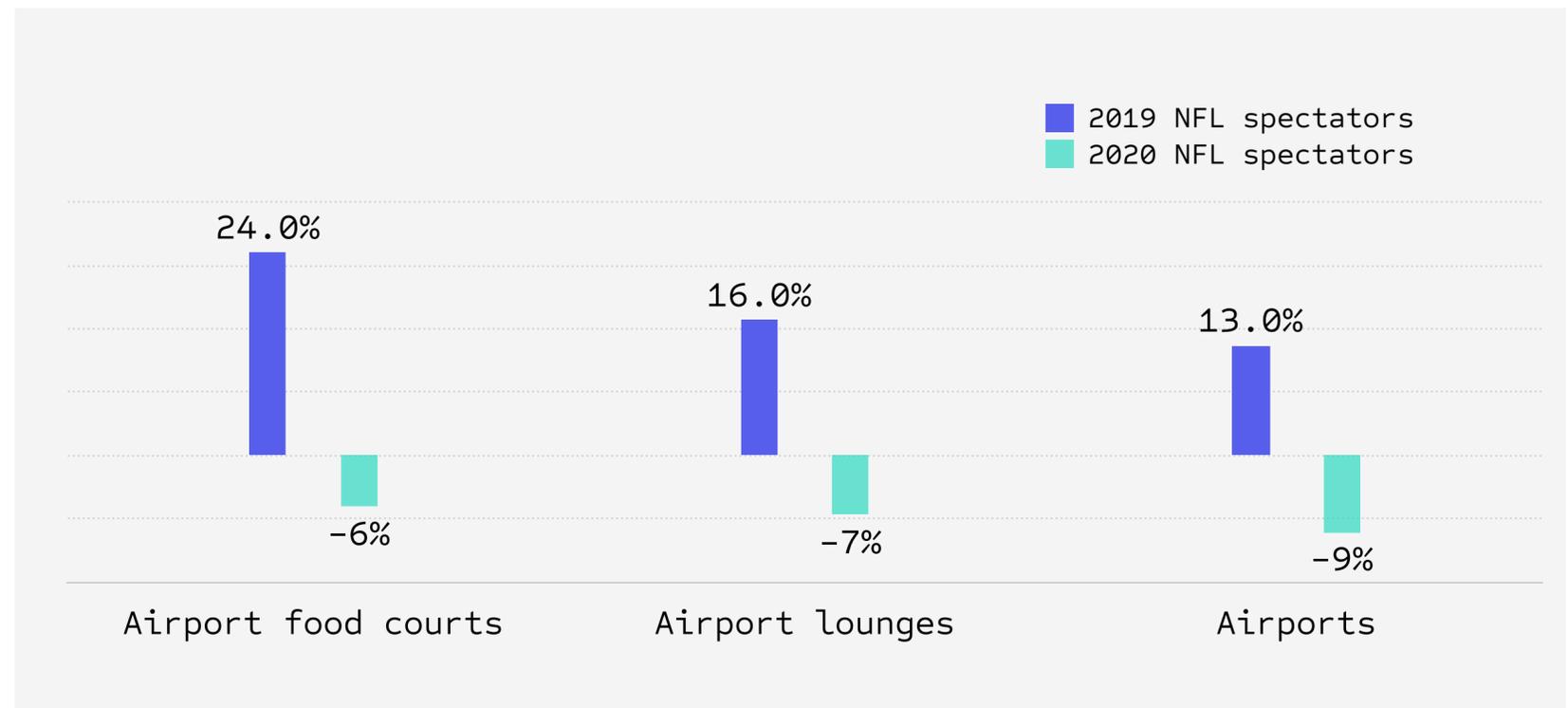


Football fans are less likely to travel to away games since the pandemic began.

2020 Football Fans Are Less Likely To Travel To Away Games Since The Pandemic Began

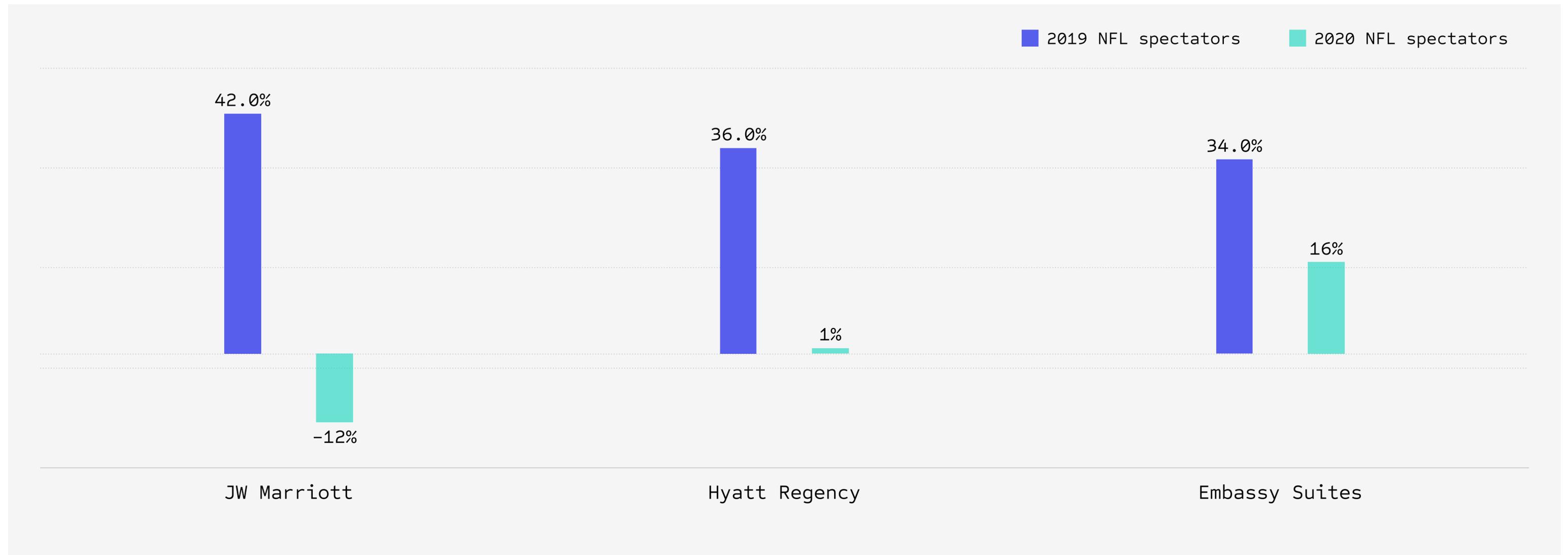
The pandemic has undoubtedly impacted consumers' willingness to travel in general. Unsurprisingly, 2020 football game attendees are less likely to visit travel spots compared to 2019 football game attendees.

So while 2020 football fans may be willing to attend a game 'IRL' in their hometown to cheer on their team, they're reluctant to travel to away games.



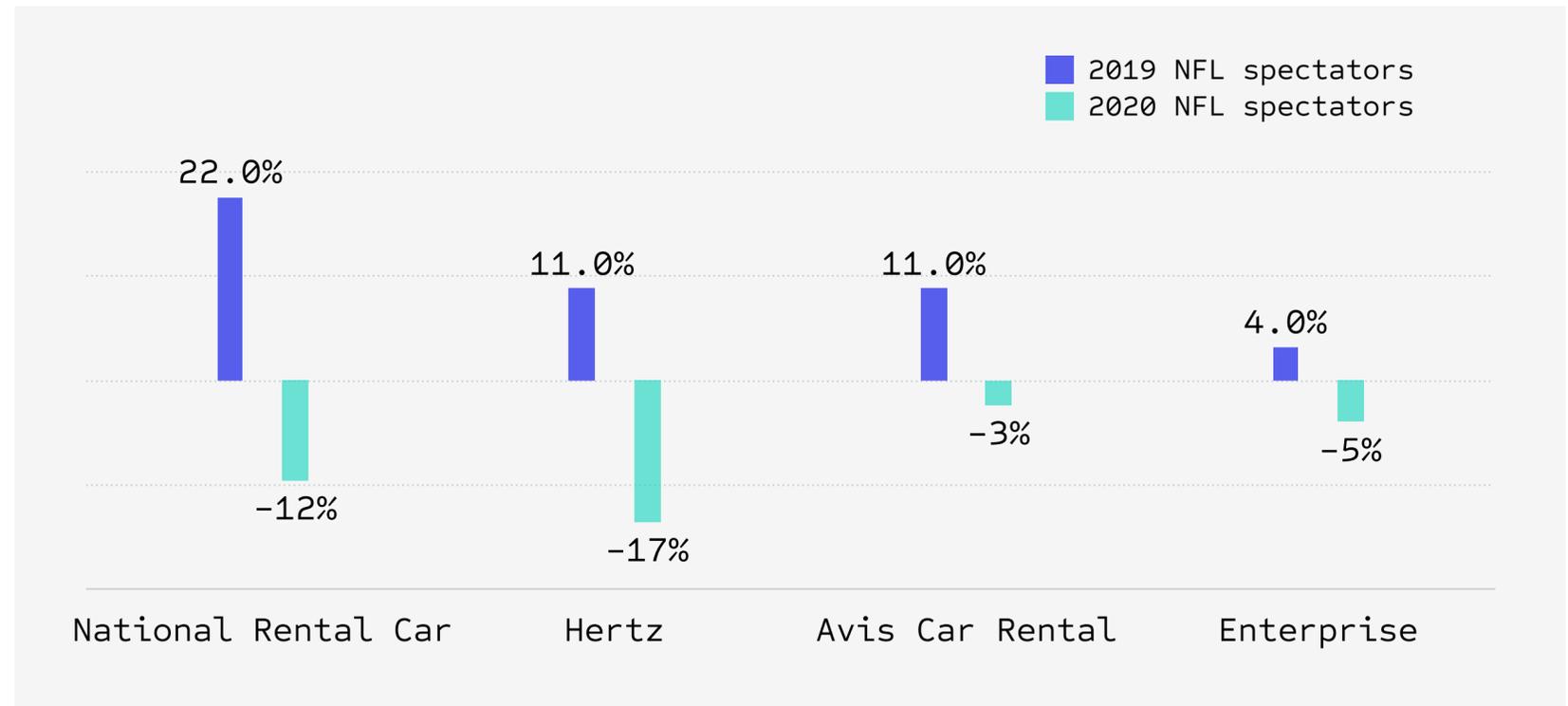
2020 Football Fans Are Also Less Likely To Book **Overnight Accommodations**

2020 NFL game attendees are even less likely than the average American to visit **hotels** (-13%) since the pandemic began.



2020 Football Fans Are Less Likely To Rent A Car

2020 NFL game attendees are less likely than the average American to visit **rental car locations** (-10%) since the pandemic began.



However, 2020 NFL TV Viewers Are More Likely To **Travel** Since The Pandemic Began

Unsurprisingly, 2020 football stadium goers are **less** likely to visit airports, rental car locations and hotels compared to fans who attended games last year. However, fans who watched NFL games on TV are more likely to travel since the pandemic began compared to the average American (and more likely compared to those attending games since the pandemic began)

- 2020 NFL TV viewers
- 2020 NFL spectators
- 2019 NFL spectators

16.0%

-9%

13%

Aiports

7.0%



-10%

7%

Rental Car Locations

4.0%



-13%

0%

Hotels

Both NFL game attendees and at-home viewers are more likely to engage in nightlife activities than the average American since the Pandemic began.

NFL TV Viewers Still Enjoy Socializing & Partaking In **Nightlife Activities**

While NFL TV viewers are likely to cheer on their favorite team from home, they may be watching some games at the bar from time to time.

However, they may be just as likely to enjoy nightlife activities at home since the pandemic began.



Compared to the average American, these fans are more likely to visit:

SPORTS BARS **+30%**
BEER GARDENS **+14%**
BEER BARS **+14%**

MARIJUANA DISPENSARIES **+38%**
BEER STORES **+14%**
TOTAL WINE **+33%**

2020 Football Game Attendees Also Enjoy Nightlife, **But Not At Home**

Similar to 2020 TV NFL fans, 2020 football game attendees are still enjoying nightlife activities - they're more likely to visit sports bars (+3%) and beer gardens (+7%) compared to the average American, though slightly less likely compared to TV fans.

However, unlike 2020 TV NFL fans, these consumers may be less likely to enjoy nightlife at home since the pandemic began.



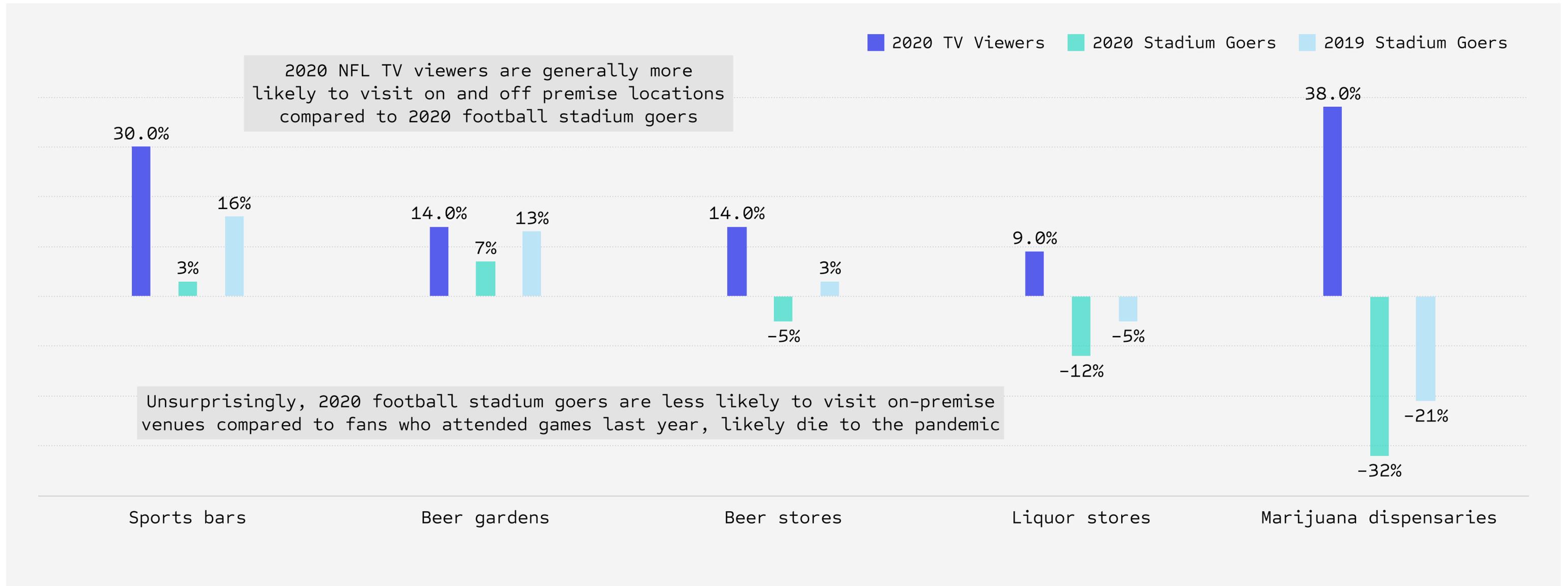
Compared to the average U.S. consumer, 2020 football stadium visitors are less likely to visit:

LIQUOR STORES **-12%**

BEER STORES **-5%**

MARIJUANA DISPENSARIES **-32%**

TV Fans Are More Likely to Enjoy Nightlife Compared To Stadium Visitors

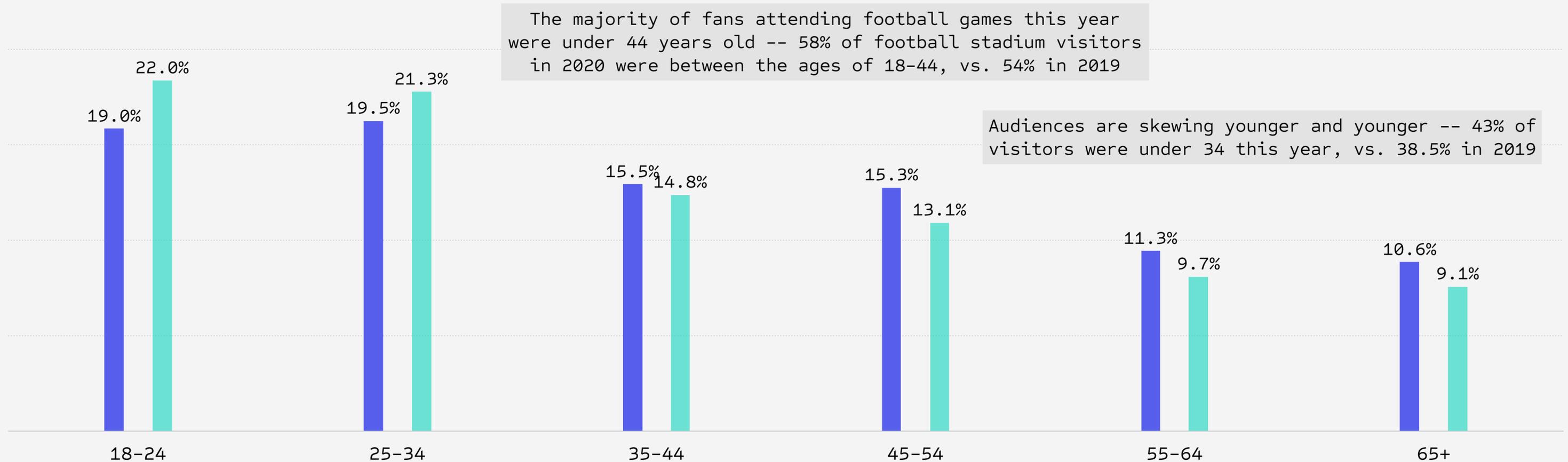


2020 football
stadium goers are
skewing younger
compared to 2019.

2020 Football Fans Are Skewing Slightly Younger Compared To 2019 Fans

Share of Football Stadium Visits By Age

■ 2019 ■ 2020



Football Stadium Visitors In 2020 Are Likely **College Students**

2020 football stadium goers were more likely to visit fraternity houses, college classrooms and medical schools compared to the average U.S. consumer.

In fact, football stadiums may be seeing an uptick in attendance amongst college students this year.

Compared to the average American, these consumers are more likely to visit college sporting venues such as:

COLLEGE BASKETBALL COURTS **+91%**
COLLEGE BASEBALL FEILDS **+84%**
COLLEGE HOCKEY RINKS **+79%**

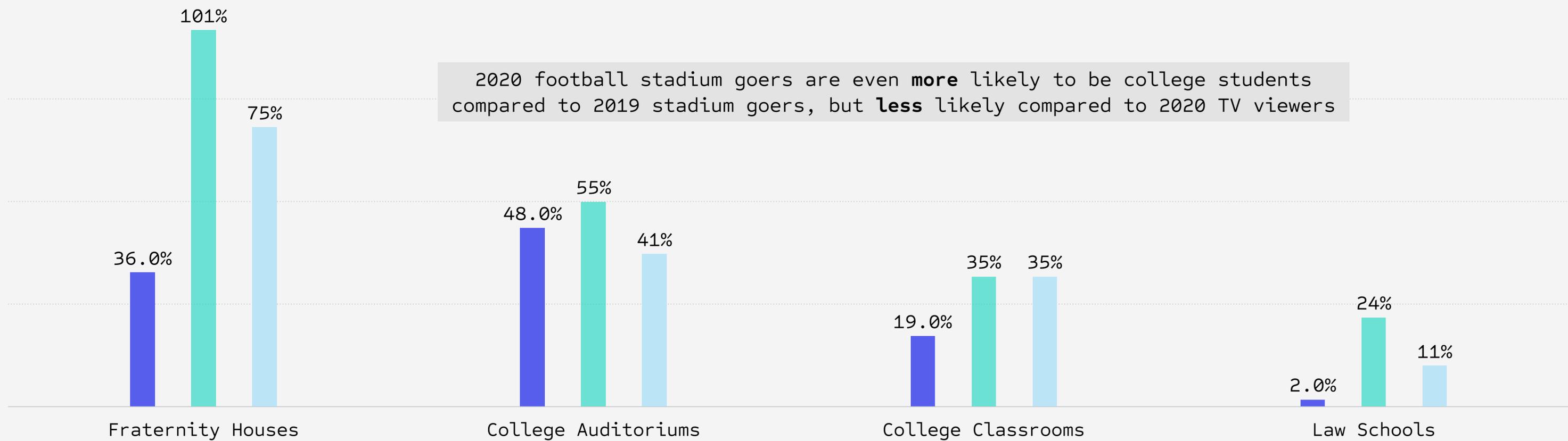
Compared to the average American, these consumers are more likely to visit various college campus venues, such as:

FRATERNITY HOUSES **+102%**
COLLEGE GYMS **+74%**
RESIDENCE HALLS **+79%**

2020 Game Attendees Are Even More Likely To Be College Students

■ 2020 Football TV viewers ■ 2020 Football stadium visitors ■ 2019 Football stadium visitors

2020 football stadium goers are even **more** likely to be college students compared to 2019 stadium goers, but **less** likely compared to 2020 TV viewers



The Takeaway

Here's What We Learned

1

Surprisingly, football fans who frequently watched NFL games on TV were actually **more 'out and about'** than those attending games 'IRL'.

OPPORTUNITY:

Target football fans in the places they're most likely to visit 'IRL'.

2

Stadium goers are less likely to **travel** to away games since the pandemic began. However, fans watching at home are more likely to travel since the pandemic began.

OPPORTUNITY:

Reach at-home football fans as they're planning their next trip.

3

Both NFL game attendees and at-home viewers are more likely to engage in **nightlife activities** than the average American since the Pandemic began.

OPPORTUNITY:

Tailor targeting to reach football fans along their path to on & off premise locations.

4

2020 Football stadium-goers are skewing **younger** to 2019 fans.

OPPORTUNITY:

Tailor messaging & positioning to address distinct audiences.

Identify & Reach Football Fans

Sports Fans



Where they go:

- Sports bars
- Pubs
- Football stadiums
- Basketball stadiums
- Football fields
- Tennis courts
- Sports clubs

Post-Pandemic Travelers



Where they eat:

- Gas stations
- Rental car locations
- Airports
- Train stations
- Rest areas
- Hotels
- Motels

Nightlife & Entertainment Enthusiasts



Where they eat:

- Sports bars
- Pubs
- Pool halls
- Casinos
- Liquor stores
- Beer gardens
- Hotel bars

College Students



Where they go:

- College gyms
- College bookstores
- College residence halls
- Fraternity houses
- College classrooms
- College football stadiums
- Colleges & universities

/audience & proximity

Sports Fan Audiences

NFL Enthusiasts

Reach consumers whose location history indicates they have previously been to an NFL stadium during the football season to generate awareness among NFL enthusiasts for the client.

Sports Bar Visitors

Reach consumers whose location history indicates they have previously been to a sports bar during the NFL season to generate awareness and increase interest for the client among NFL Enthusiasts.

Live Sports Fans

Reach consumers whose location history indicates they enjoy attending live sports events in general not just as it relates to a given event to generate awareness among relevant consumers on behalf of the client. These consumers are known as having frequently attended large-scale sporting venues such as stadiums and arenas. Locations include Oracle Arena, Madison Square Garden, The Staples Center, Wrigley Field, Lambeau Field, Yankee Stadium, Fenway Park, etc.

NFL Playoffs Enthusiasts

Reach consumers in real-time while they are at NFL stadiums during the NFL playoffs to generate awareness among NFL enthusiasts on behalf of the client.

How To Mimic This Research To Inform Your Own Marketing Strategies

Location data allows you to identify those who are still staying home versus those who are out and about, enriching first party customer data and tailoring messaging to their mindset. Here are three ways to put this technology to work:

While this analysis focuses on how TV programming influences people's behavior, marketers can leverage this same technology to measure their TV ads' effect on store visitation with Foursquare **Attribution**.

Marketers can also target specific location-based audiences with TV ads, tapping into our **Audience** integrations with TV buying platforms such as Amazon Advertising Platform.

Researchers can also conduct this type of trend analysis themselves by licensing Foursquare **Visits**. To explore the different location datasets available, please visit us on **Amazon Data Exchange** today.

Thank You

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