



Numerator

NEW FRONTIERS

Calling an Audible for the 2020 Football Season

Engaging Football Fans Away from the Stadium

Football is wildly popular among Americans



1 in 3 US Households
are NFL or College Football Fans



22%

Consider themselves
Avid or Committed
Sports Fans



15%

Attended an NFL or
College Football game
last season

In fact, during the 2019 seasons NFL and college fans spent over **\$55 Billion** on game day food & beverages, including:

Top Categories, Projected Sales and Average Spend per Household

2019 Football Season, 9/1/2019 – 2/2/2020

Traditional
Tailgate Meats

\$8.5B

Alcohol
Beverages

\$7.2B

Packaged Salty
Snacks

\$6.6B

Avg \$/HH:

\$207

\$215

\$159

categories
include:

beef, hot dogs, pork,
poultry and sausage

beer, wine, spirits and
all other alcoholic beverages

chips, pretzels, crackers,
popcorn and snack mix

While fans usually spend game days at tailgates and stadiums, COVID-19 restrictions have limited social options for this season.

As week 8 of the NFL kicked off, *only about half of teams allow fans to attend*, meaning fans won't be spending nearly as much on tickets or normal game day activities.

Which brings up an important question: **What will they be doing instead? And how will they be shopping for game day?**



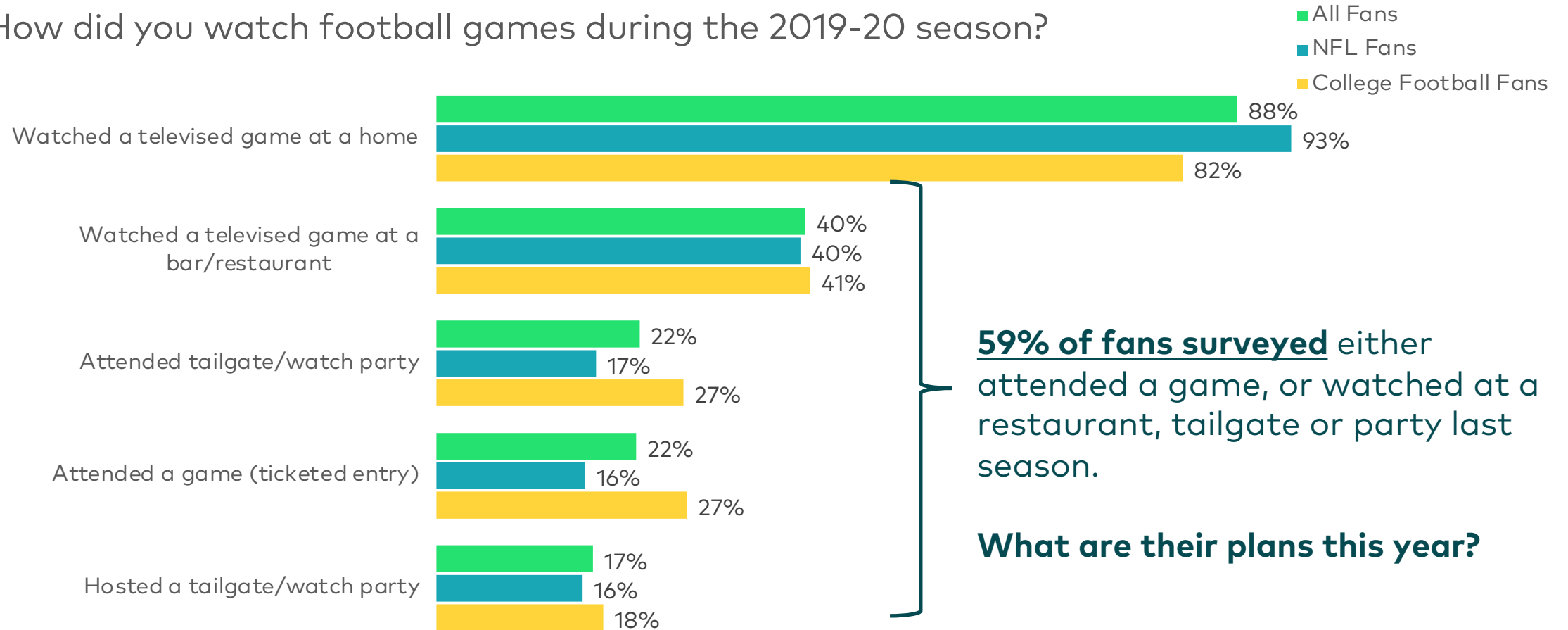
Using the Numerator panel, we asked over 2,000 NFL and college football fans about their plans this season

- How did you watch football games last season?
- What are your plans for watching games this season?
- Will you buy food and groceries specifically for game days?
- Do you expect teams to expand attendance limits this season?



Last season, most fans enjoyed watching games in social settings, including bars, restaurants and at watch parties

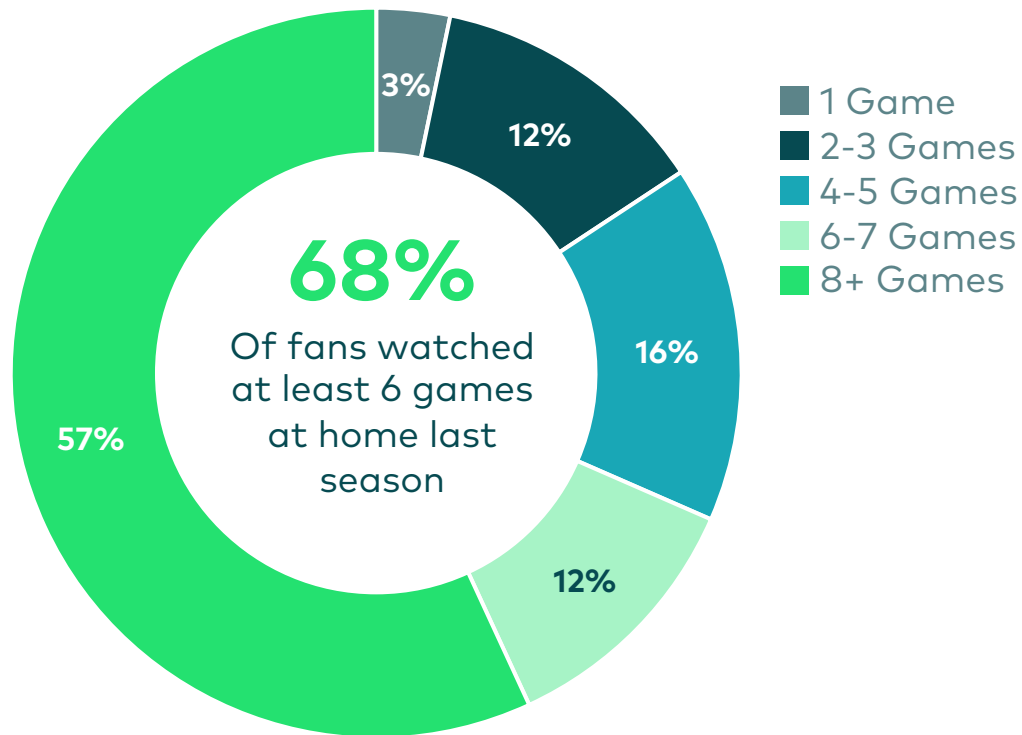
How did you watch football games during the 2019-20 season?



2/3 of fans watched 6+ games at home last season, with even more planning to increase home viewership this year

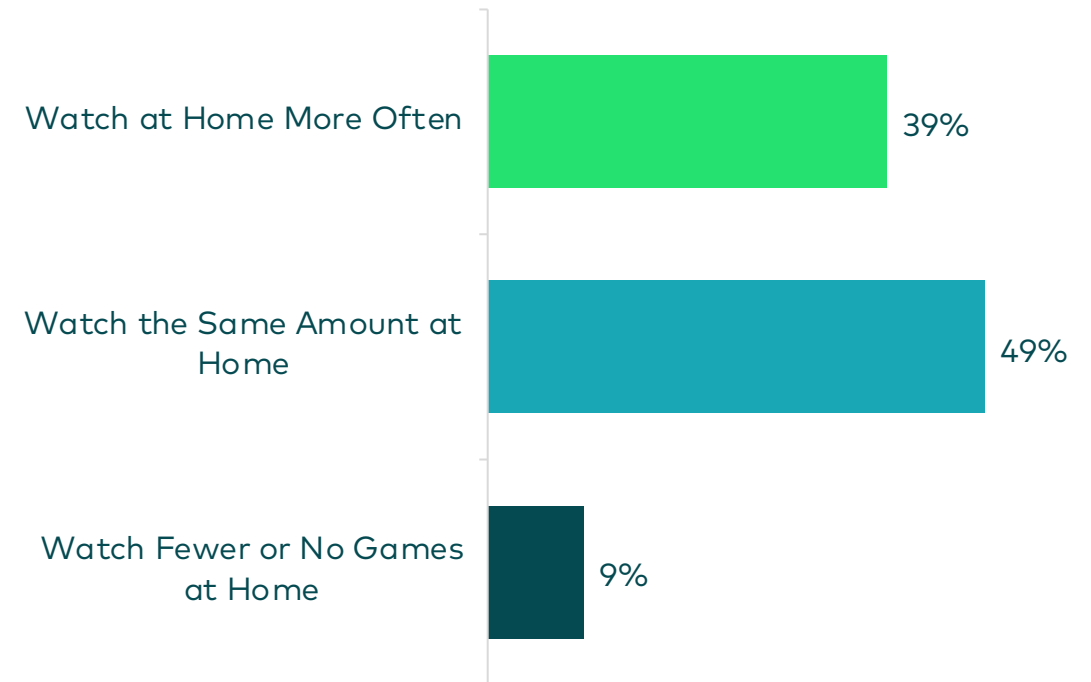
Games Watched at Home Last Season

2019-20 Season



Plans for Watching at Home This Year

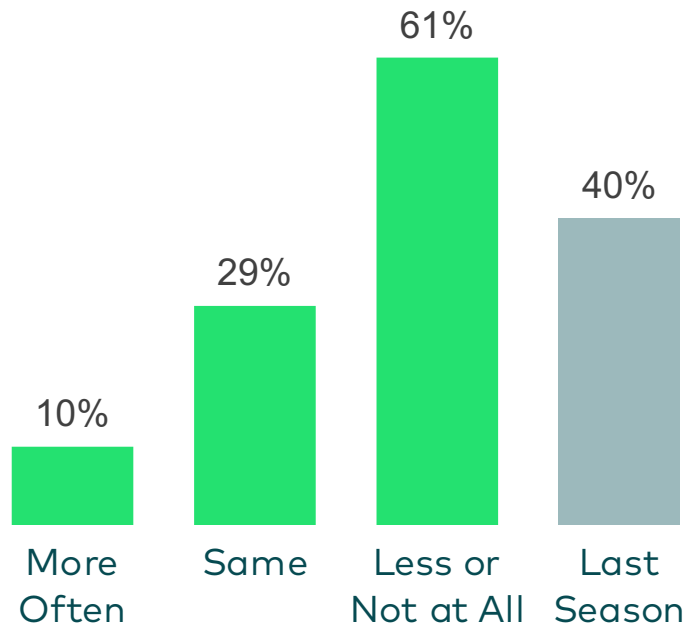
2020-21 Season



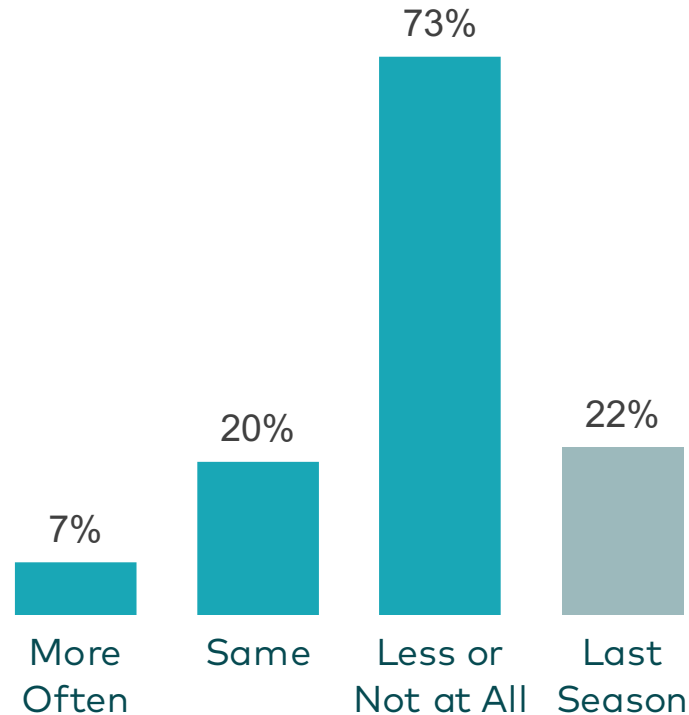
Overall, most fans have modified plans this season, with many expecting to watch fewer or no games in public spaces

Among NFL & College fans, how do they expect to spend their game days this year compared to previous years?

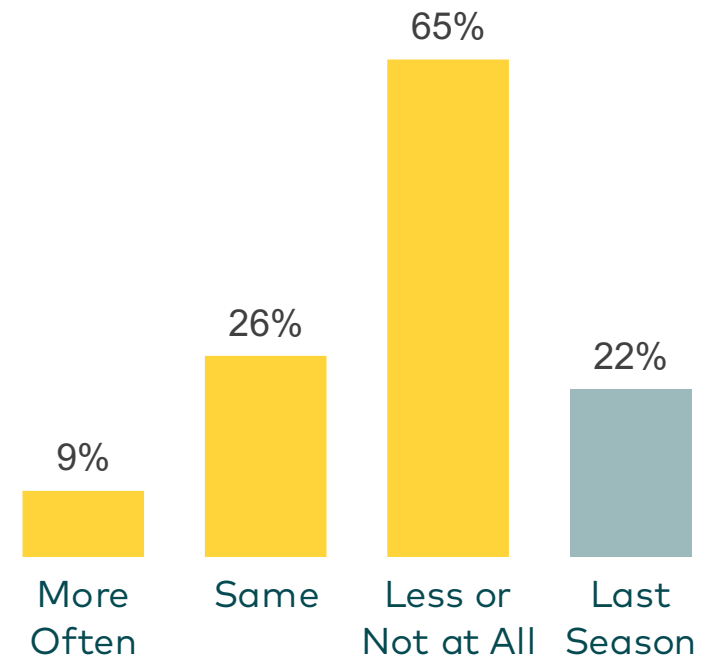
Watch at Bar or Restaurant
All Football Fans



Attend a Game
All Football Fans

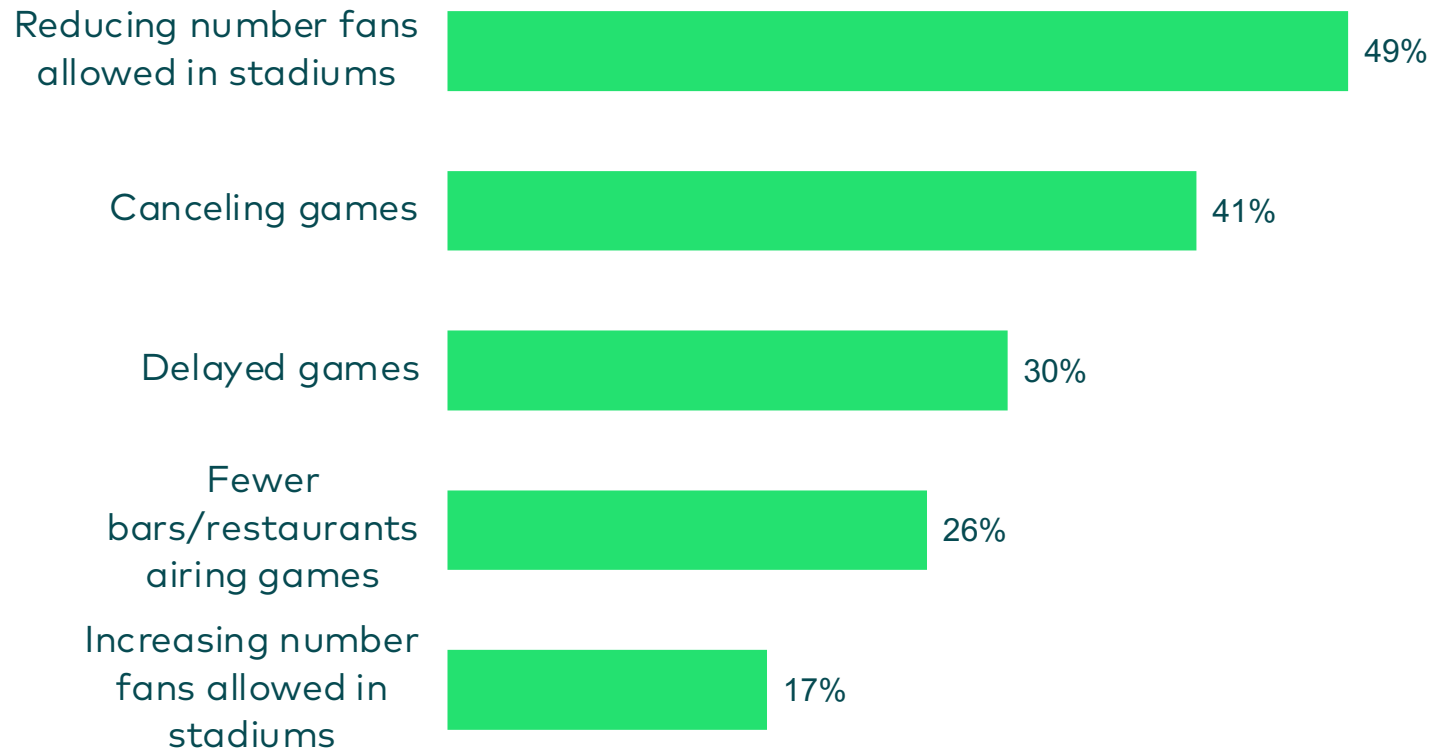


Tailgate or Watch Party
All Football Fans



Fans are not very optimistic about stadiums expanding fan capacity, and many expect games to be cancelled or delayed

Do you anticipate any of the following occurring during the 2020-2021 season?



And when asked about expectations for stadium capacity...

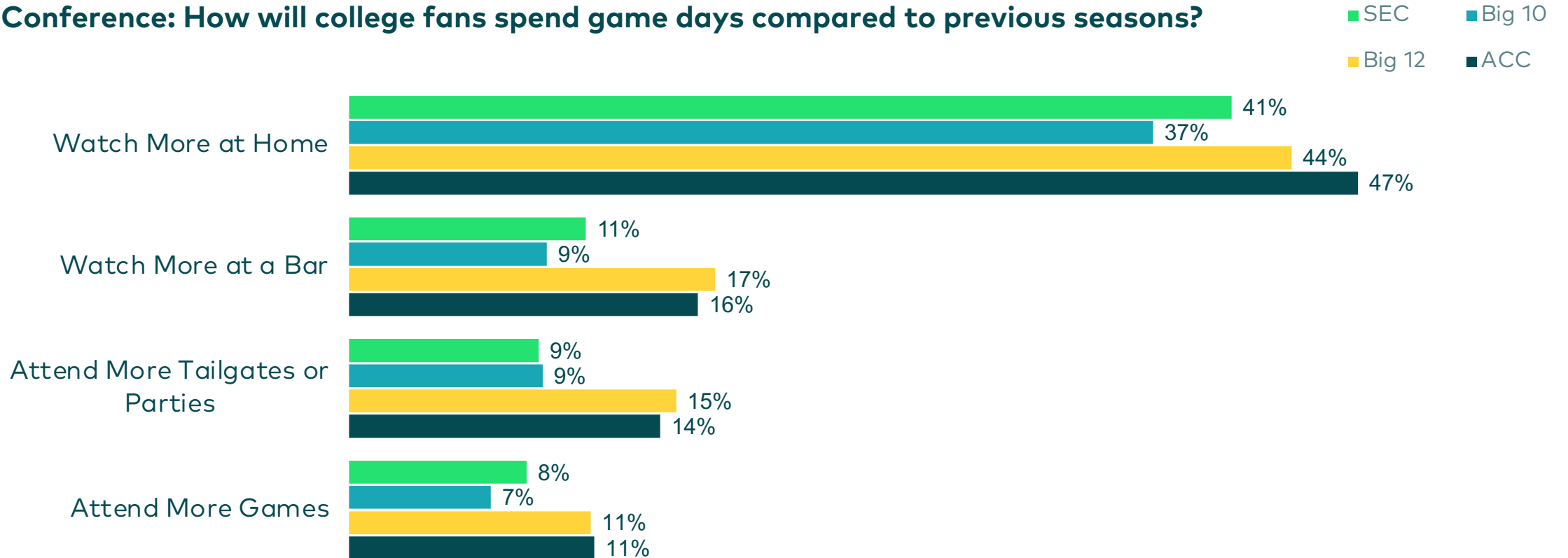
71%

of fans do not expect stadium capacities to exceed 50% this season

Among college fans, many plan to watch more at home, but some still have plans to watch at bars and tailgates

Across Midwest and Southeastern states, Big 12 & ACC fans are much more likely to visit bars, parties and stadiums on game days

By Conference: How will college fans spend game days compared to previous seasons?



Although NFL and college football fans won't be tailgating and going to games every week, they still plan to continue watching games every week at home.

So what are their shopping plans this season? Will they continue to stock up on hot dogs, chips and beer to cheer on their team each weekend? Or will the effect of the pandemic result in reduced spending for game day?

Let's see what the Numerator panel has to say!

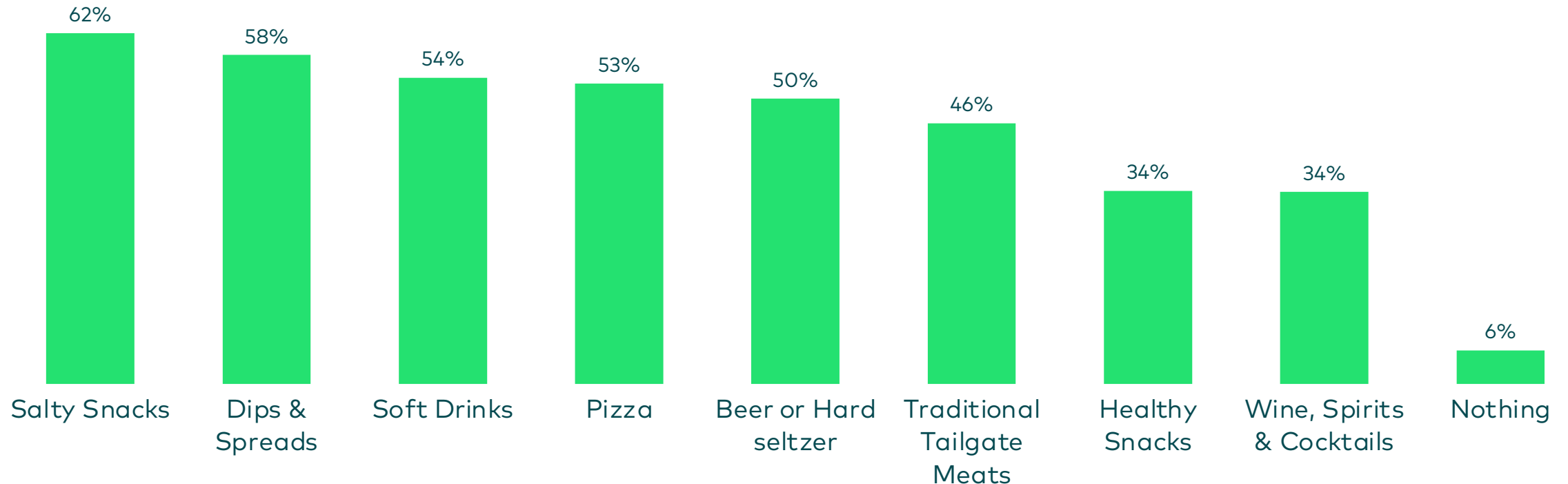


Traditional football and party foods are still popular among fans this year, and most plan to shop for game days

Over half of fans plan to buy snacks, dips, drinks, pizza and beer to enjoy on game day

What foods will you purchase for Game Days at Home this Season?

Grocery Purchases Only – Not Including Carry-Out or Delivery



With more fans opting to watch at home instead of restaurants, tailgates or games, *has there been a positive impact on grocery sales so far this season?*

Through the first five weeks of the football season, grocery spending has increased significantly among football fans

+8.7%

Increase in Total Grocery Spending

*Projected Sales
9/7/20 to 10/11/20 vs Year Ago*

Projected Sales Increase by Category

+11%

Meat



+11%

Alcohol Beverages



+17%

Condiments



+13%

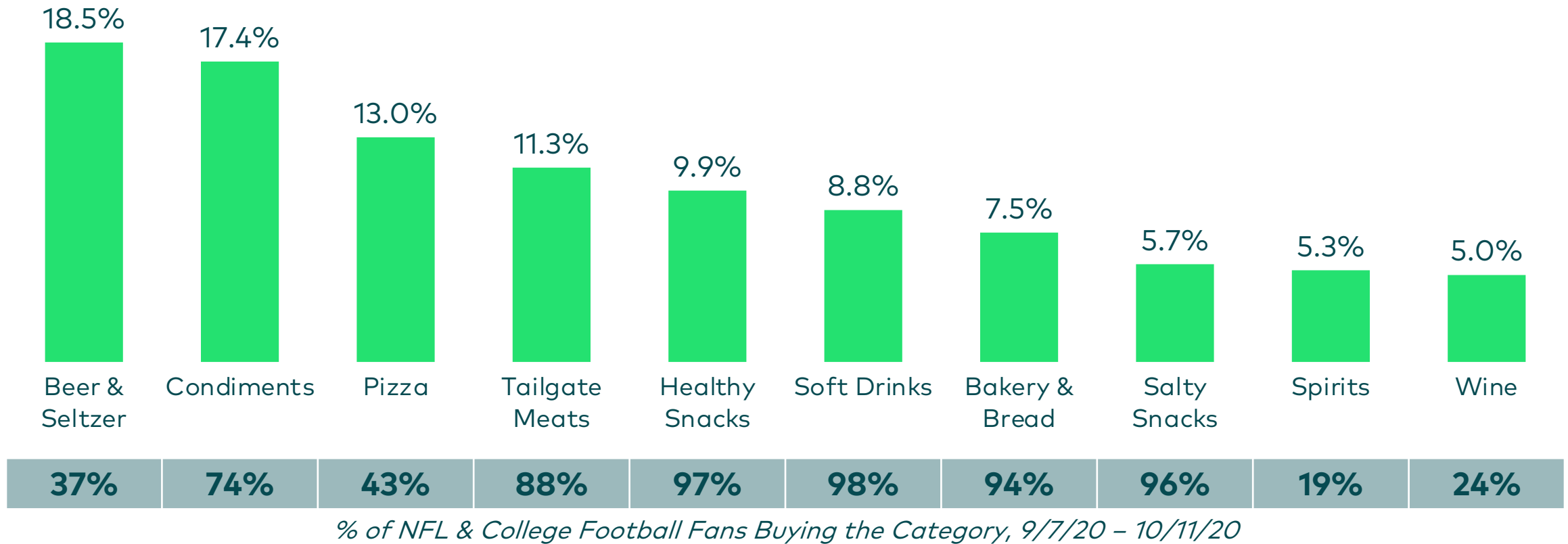
Pizza



And as fans opt to watch more games at home, food and beverage sales have been on the rise this fall

Projected Sales Increase by Category

NFL & College Football Fans, 9/7/20 – 10/11/20 vs Year Ago



Among the brands enjoying the strongest sales growth among football fans are...

Top Brands, Projected Sales Increase vs Year Ago

NFL & College Football Fans, 9/7/20 – 10/11/20

Alcohol Beverages

 **+57%**

 **+31%**

 **+29%**

 **+23%**

Meat, Pizza, Snacks

 **+37%**

 **+33%**

 **+20%**

 **+16%**

Soft Drinks

 **+27%**

 **+21%**

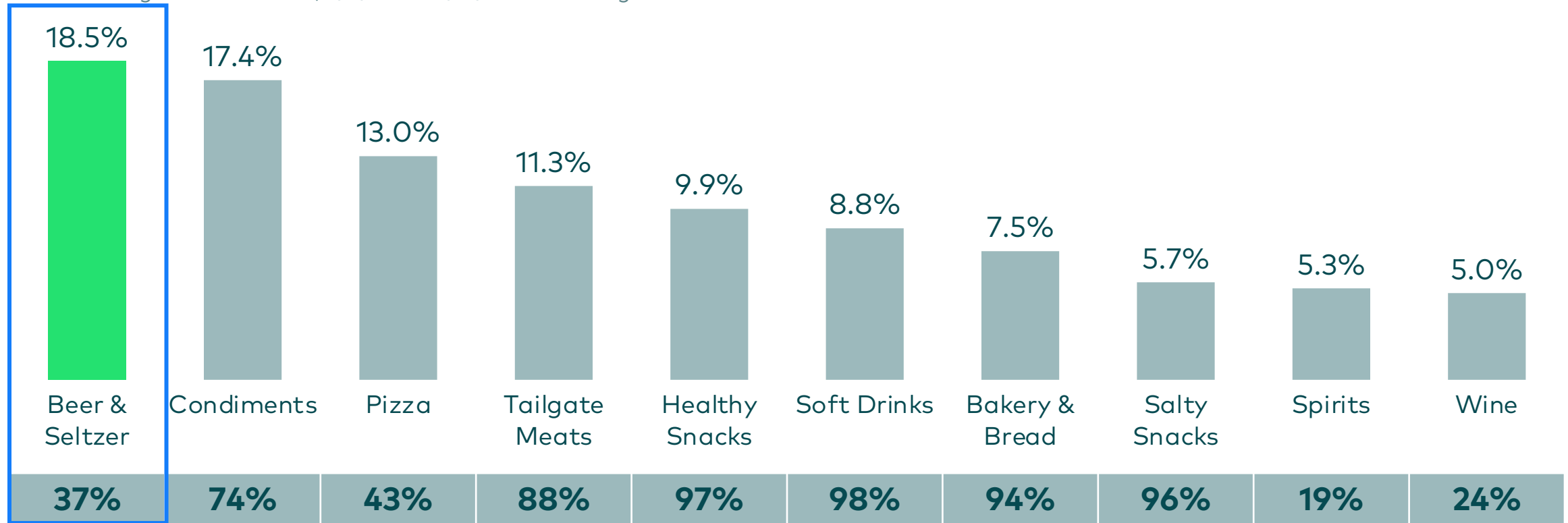
 **+18%**

 **+14%**

The beer category has been particularly strong this season as fans shift from bars and tailgates to in-home viewing

Projected Sales Increase by Category

NFL & College Football Fans, 9/7/20 – 10/11/20 vs Year Ago

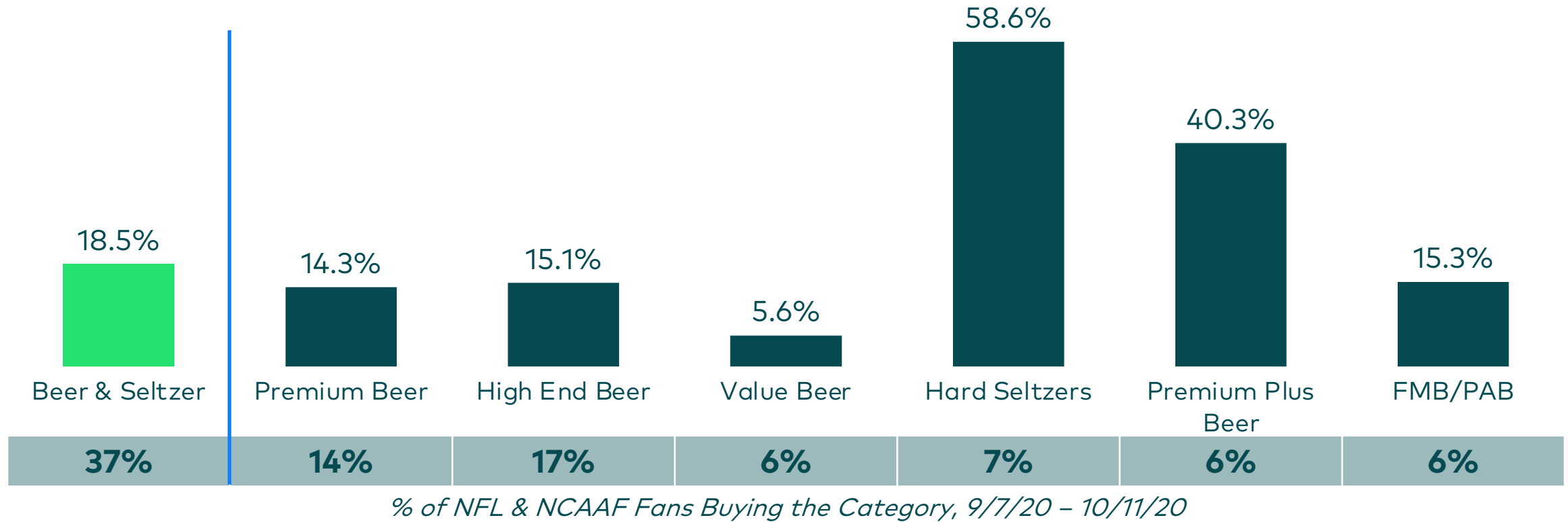


% of NFL & NCAAF Fans Buying the Category, 9/7/20 – 10/11/20

Seltzers have been a primary growth driver, but fans have also been shopping more premium and high end beer

Projected Sales Increase by Beer Category

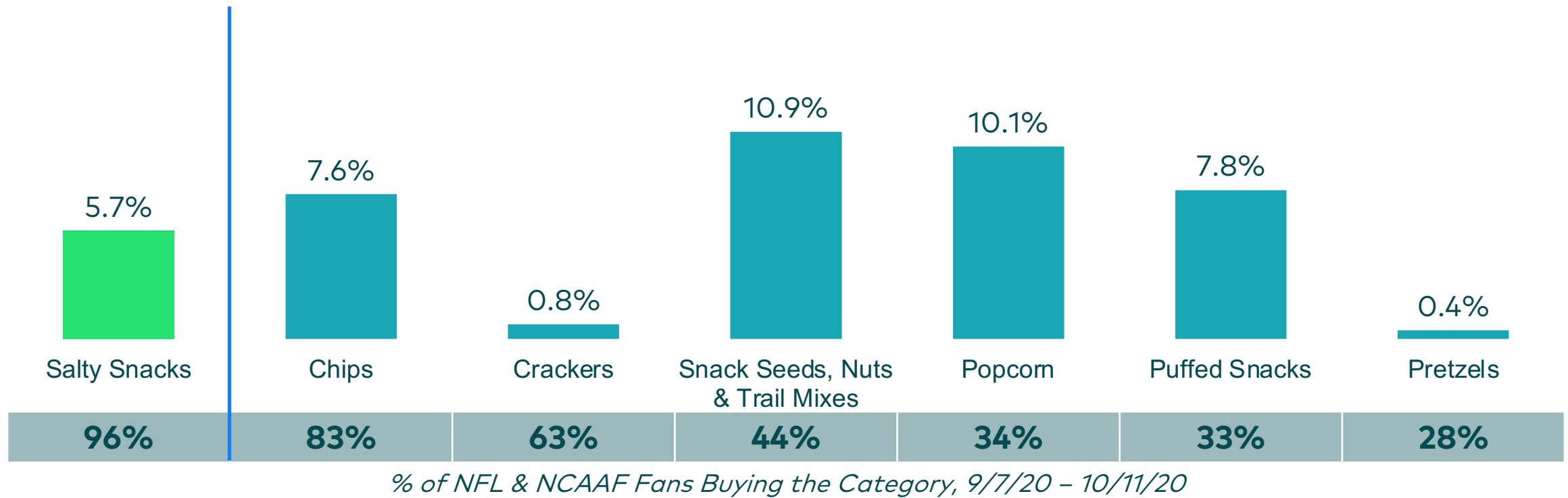
NFL & College Football Fans, 9/7/20 – 10/11/20 vs Year Ago



Chips, one of the largest snack categories, have also enjoyed fantastic growth among football fans this season

Projected Sales Increase by Snack Category

NFL & College Football Fans, 9/7/20 – 10/11/20 vs Year Ago

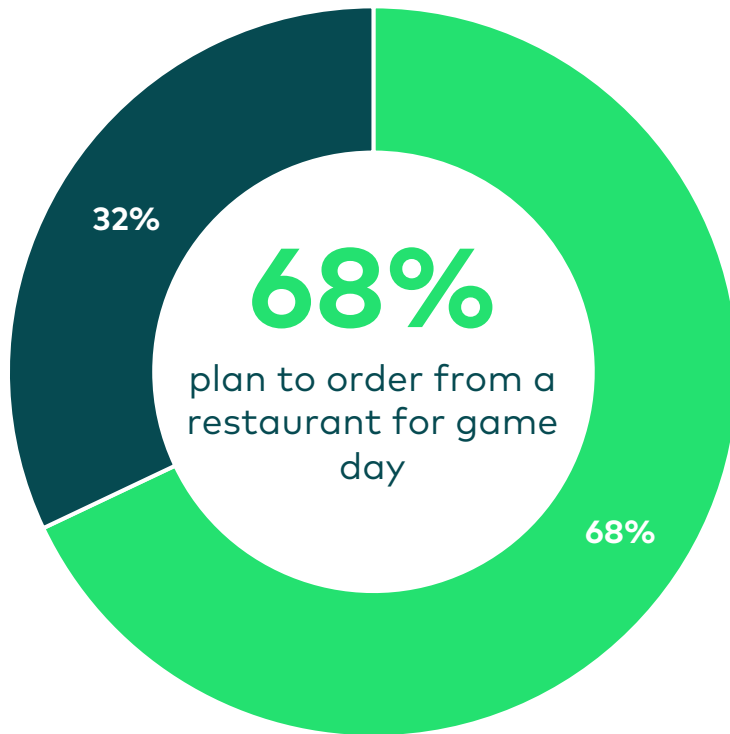


But fans are also planning restaurant food on game days

Although many aren't prepared to visit restaurants, fans are still planning to order delivery and carry-out food for their in-home game day experience

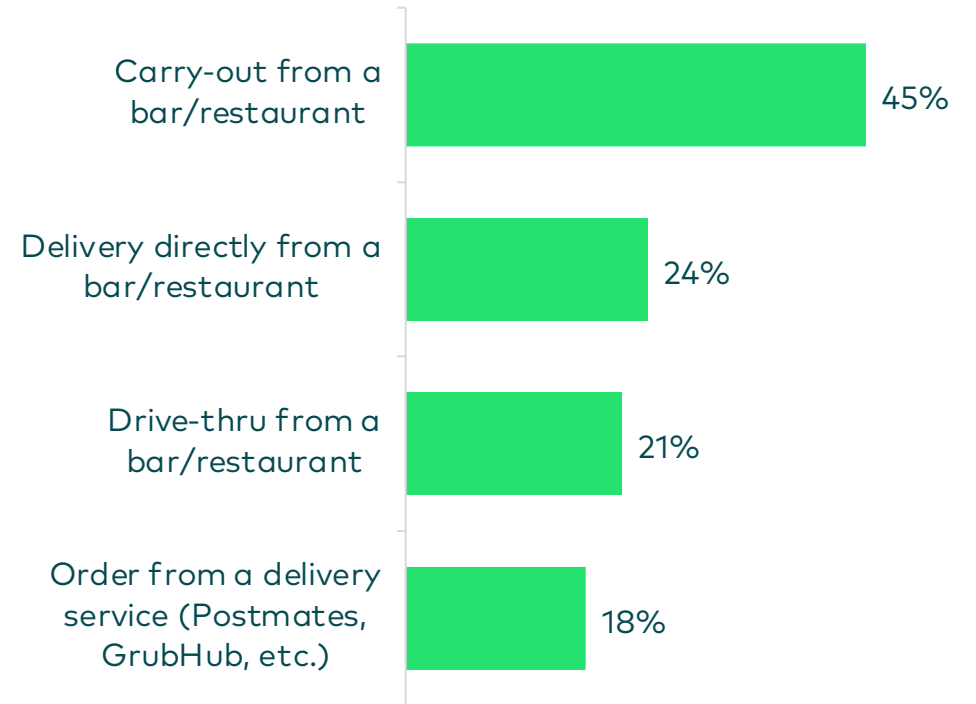
Plans to Order from a Restaurant

All NFL & College Football Fans



Planned Restaurant Order Type

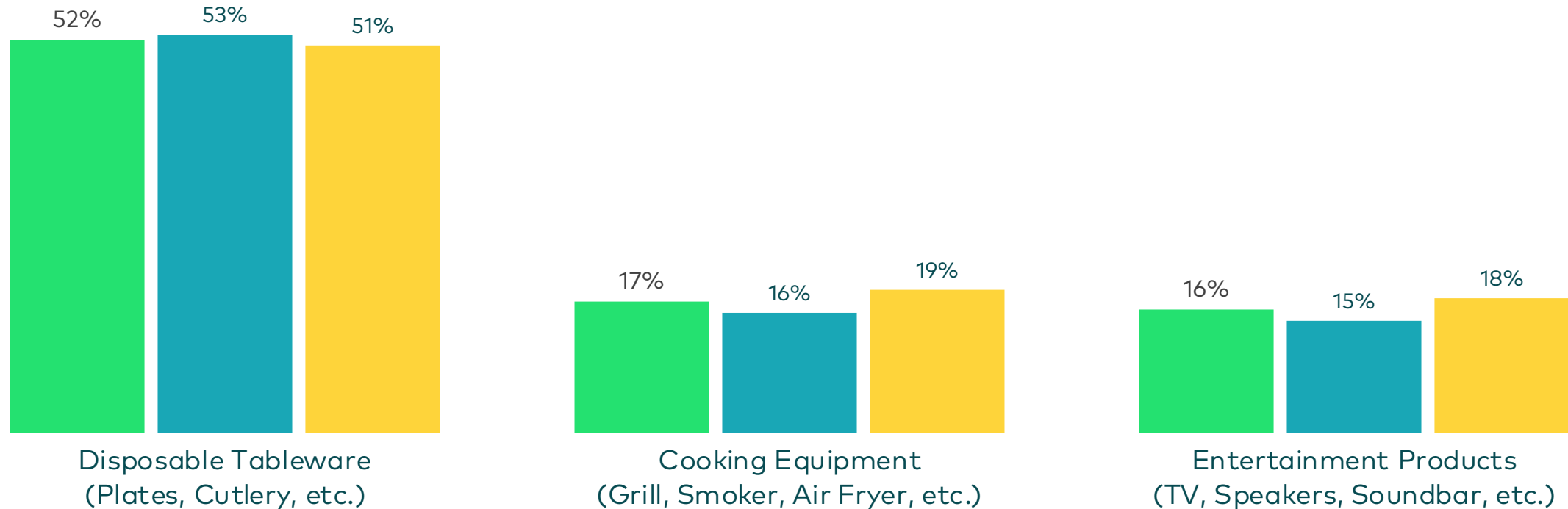
All NFL & College Football Fans



Fans also plan to buy disposable tableware, and about 16% will be making entertainment purchases for the season

Which of the following non-edible items do you anticipate purchasing for games?

■ Total ■ NFL Fans ■ College Football Fans



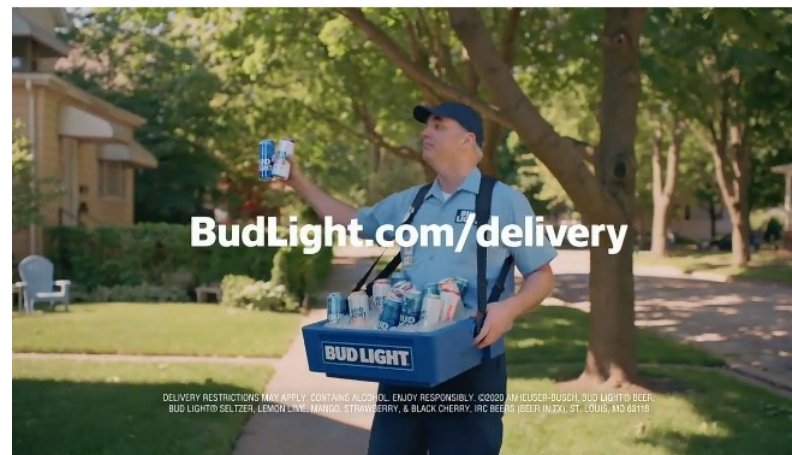
However, despite increased spending from fans, ad spend has declined significantly for some game day food + beverage categories

YOY Change in Estimated Ad Spend



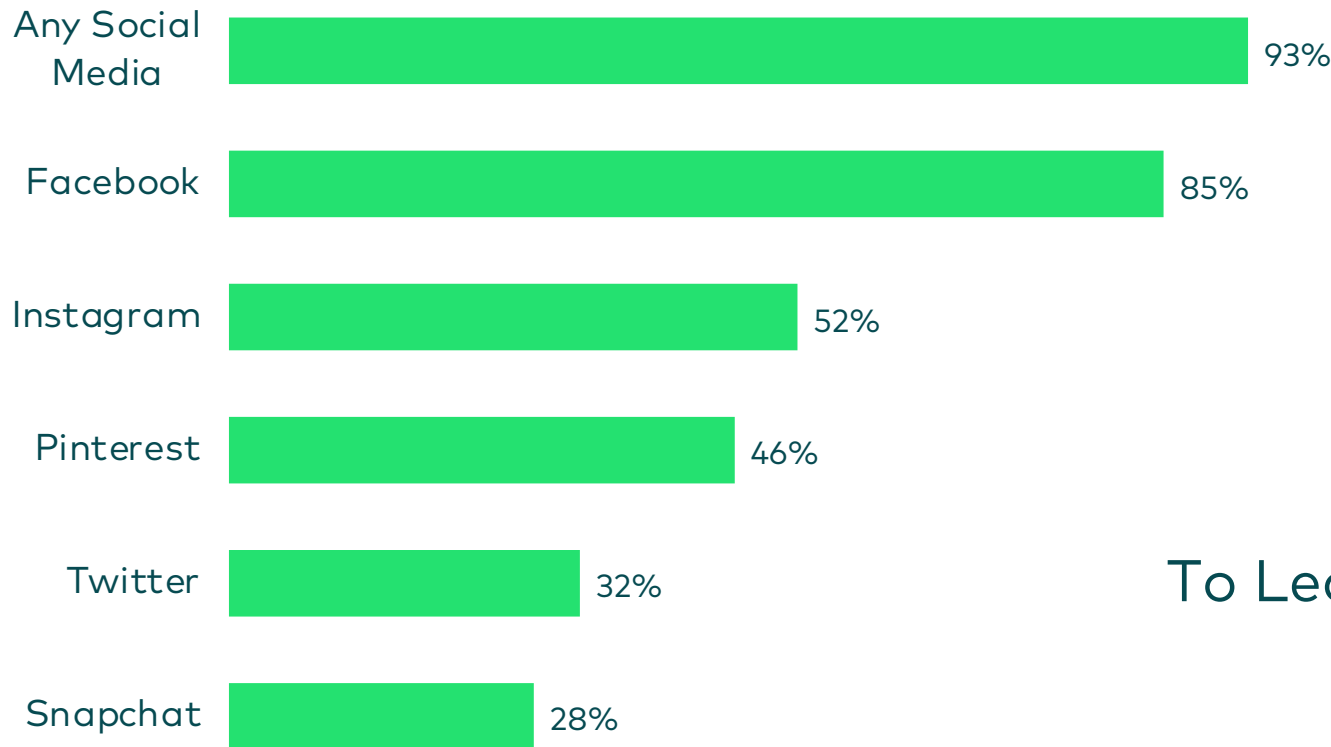
Those brands continuing to spend on advertising have adjusted their messaging

Beverage brands in particular adjusted their messaging to emphasize delivery, masks, and the at-home experience.



And online ad spend should be an important consideration for brands, as fans are highly engaged with social media

Social Media Platforms Used, % of Football Fans



65%

Use Social Media
Several Times a Day

25%

Use Social Media
To Learn About Products & Services

Football Fans are Staying Home this Year

While over half of football fans watched games away from home last year, most are planning to increase the amount of games they watch from home this season.

They're Still Enjoying Game Day Though!

Just because they're staying home doesn't mean they aren't shopping. Almost all football fans are still buying food and drinks specifically for game days.

Grocery Sales are Increasing

As more fans stay home to watch games, sales of beer, snacks, meat and other grocery categories are on the rise, with sales up double-digits among football fans.

Ad Spending for Game Day Goods is Down

Although fans are spending far more on grocery goods this season, many categories are showing significant declines in advertising spending.

What's next for brands?

- **Optimize your advertising messaging** to better connect with college football and NFL fans to take advantage of this unique growth opportunity
- Ensure your brands are **actively engaging fans on social media** on and leading up to game day to maximize brand awareness and consideration
- As different areas move through the season with varying degrees of COVID-related restrictions, consider implementing more **localized advertising strategies**.
- Continue to **increase brand awareness through targeted advertising strategies** geared to football fans as they stock up for game day each week.

What's next for retailers?

- Optimize ad and promo strategies to **take advantage of this surge in game day grocery shopping**
- Consider additions or improvements to **Prepared Foods or Catering Offerings** to better compete with restaurant and delivery options.
- Re-visit fall marketing strategies as football season presents an **opportunity to capture additional unique shopping trips** as fans transition their game days from the stadium to the couch.



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Get the insights you need to engage fans away from
the stadium.

hello@numerator.com