

# FOOTBALL FANS AS CUSTOMERS

*An In-Depth Profile of the Shopping Attitudes,  
Behaviors of Over 500 Football Fans*

2016

# A LETTER FROM RICK WEST, *CEO & Co-Founder, Field Agent*

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Football is a game of inches. So is selling to—and winning—football fans as customers. Victory goes to brands and retailers that are attentive to details: about customers, competitors, and partners.

This report, “**Football Fans as Customers 2016,**” will help you prepare for the oncoming blitz of football fans—as they hit stores this fall to buy snacks, beverages, and all the other kit that makes watching football more enjoyable.

We surveyed over 500 football fans about their shopping behaviors and preferences: Where do they buy gameday groceries, fast food, and fan gear? Which soda, beer, liquor, and salty snack brands do they favor when taking in a little gridiron action? And much more.

This is the first of two studies we’ll conduct with football fans about their shopping attitudes and behaviors. Later in the season, Field Agent will follow-up this pre-test with a post-test, to compare what fans said they’ll do against what they actually did.

In a game of inches, every detail matters.

**Our expectation is that this report will equip you with timely and relevant details to score touchdowns with football customers.**

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Acutal Agent Photos from Super Bowl 50

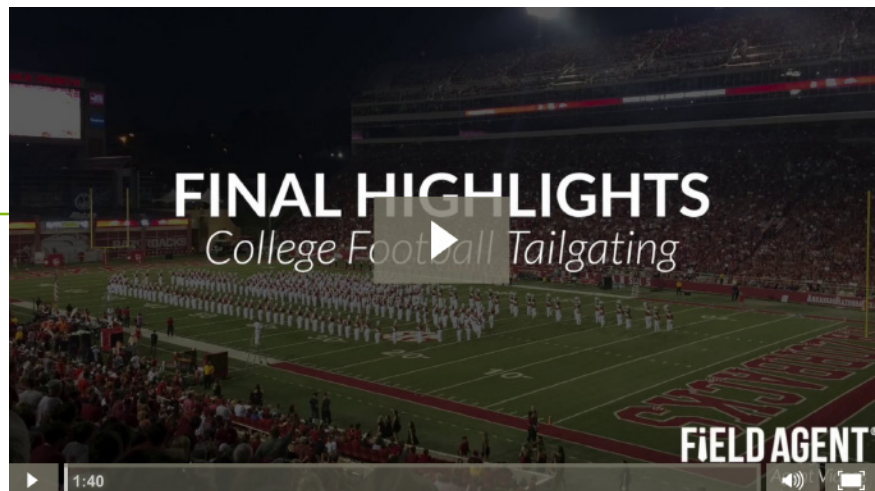
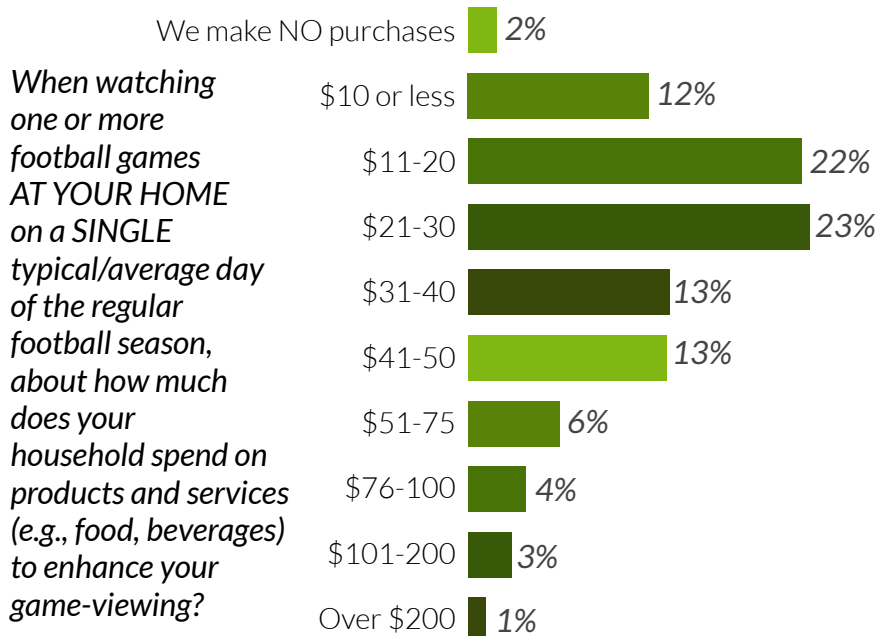


Locations of the 520 male and female football fans who participated in this study.



## GAMEDAY SPENDING

How much do football fans spend to enhance the at-home game-viewing experience? In our survey, half said they'll spend between \$20-50 per gameday on snacks, beverages, grill supplies, and other items to better enjoy watching games at their homes, while 14% expect to spend over \$50 on the average gameday this season.



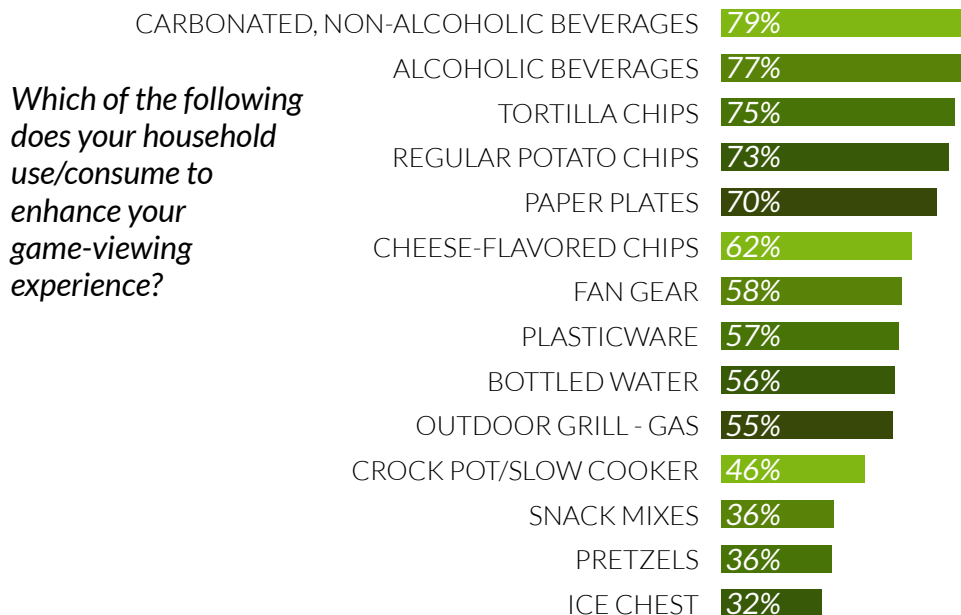
Actual Agent videos of college football tailgating



Actual Agent photos of gameday food spreads

## AT-HOME GAMEDAY | Products and Activities

What products do football fans consume or use when watching football at their homes those crisp autumn days? Not surprisingly, non-alcoholic carbonated beverages (79%) like soda are very common on gameday, as are alcoholic beverages (77%). Chips—first tortilla chips (75%), then regular potato chips (73%)—are also fan favorites. Non-edibles like paper plates (70%), fan gear (58%), plasticware (57%), gas grills (55%), and crock pots/slow cookers (46%) are also prevalent. And speaking of grills, outdoor grilling was easily the most popular at-home gameday activity in our survey, with a whopping 83% saying they fire up the barbie to better enjoy football.



## GAMEDAY APPETITES | Eating and Drinking Habits

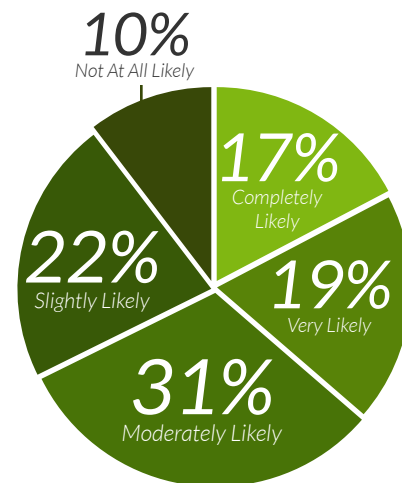
Football is an occasion for indulgence. Consider how many *completely* agreed with the following statements: I eat more frequently on gamedays (43%); I eat more calories on gamedays (51%); I eat less healthy on gameday (48%). And the majority at least somewhat agrees they drink more soda and alcohol on Saturdays and Sundays during the football season. Moreover, for 36% of fans in our survey, fast food is completely or very likely to play a role in their 2016 football-viewing.

*To what extent do the following statements describe YOU on a typical or average gameday AT YOUR HOME?*

Comparison of Eating and Drinking Habits on Gameday Compared to a Regular Day

	I eat more FREQUENTLY	I eat more CALORIES	I eat less HEALTHY	I drink more SODA	I drink more ALCOHOL
Completely agree	43%	51%	48%	23%	34%
Agree	29%	27%	28%	19%	28%
Somewhat agree	15%	16%	16%	18%	15%
Neutral	8%	4%	3%	19%	10%
Somewhat disagree	2%	1%	2%	6%	1%
Disagree	3%	1%	2%	8%	5%
Completely disagree	0%	0%	1%	6%	7%

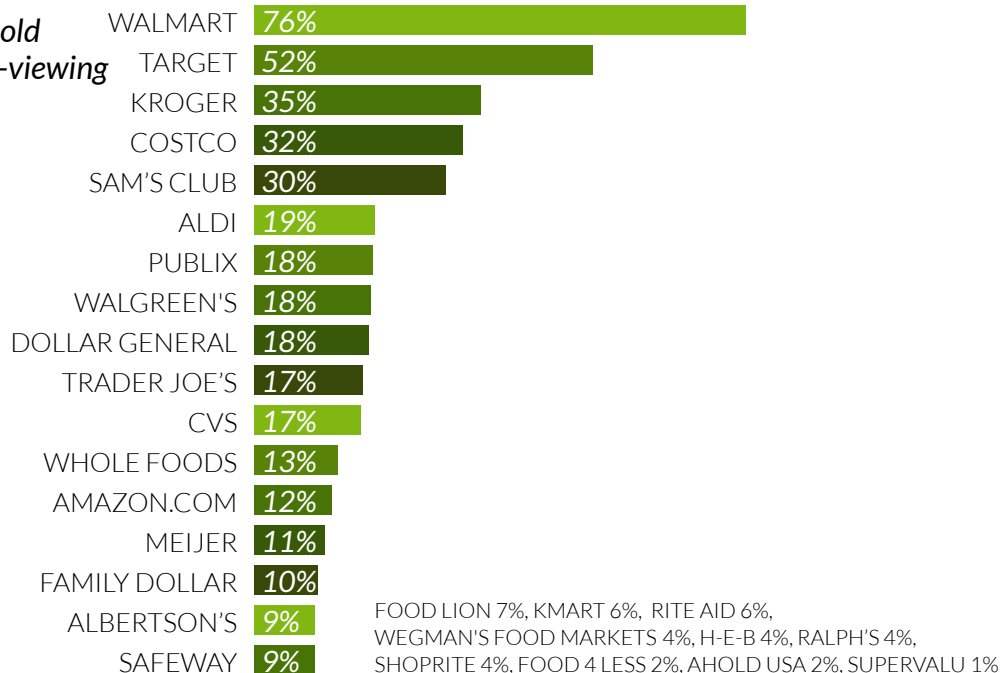
*What is the likelihood your household will purchase FAST FOOD to enhance your game-viewing experiences (for consumption at-home or at the game) this upcoming football season?*



## GAMEDAY FOOD & BEVERAGE | Retailers

Which retailers are go-to destinations for gameday food, snacks, and beverages? Three of four fans said they'll likely visit their neighborhood Walmart to stock up on gameday eats and drinks this season, while 52% said they'll patronize Target. Kroger (35%), Costco (32%), and Sam's Club (30%) rounded out the top 5.

*From which of the following RETAILERS will your household LIKELY purchase foods/beverages to enhance your game-viewing during the football season THIS YEAR.*



## GAMEDAY FAST FOOD & FAN GEAR | Retailers

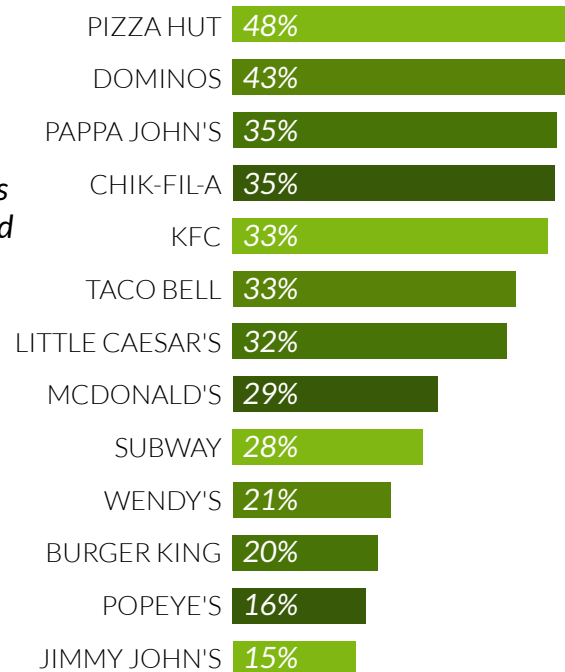
In our survey, 91% indicated they're at least a little likely to purchase fan gear for the approaching season. Among these (n = 474), Amazon, Walmart, Dick's Sporting Goods, Target, and Kohl's were the most popular shopping destinations for team-blazoned clothing.

Pizza purveyors—like Pizza Hut, Domino's, Papa John's, and Little Caesar's—are primed for a championship football season, among those who said they're at least a little likely to purchase fast food for their football-watching enjoyment (n = 474).

*From which retailers will your household LIKELY purchase FAN GEAR for the upcoming football season?*



*Which of the following FAST FOOD venues will one or more members of your household LIKELY buy food from to enhance game-viewing during the football season?*





# WILL YOUR IN-STORE DISPLAYS WIN FOOTBALL FANS?

59% of football fans in a Field Agent survey said they're *completely* or *very likely* to purchase items from a football-themed in-store display this season. Another 25% indicated they're moderately likely.

Yes, displays win shoppers.

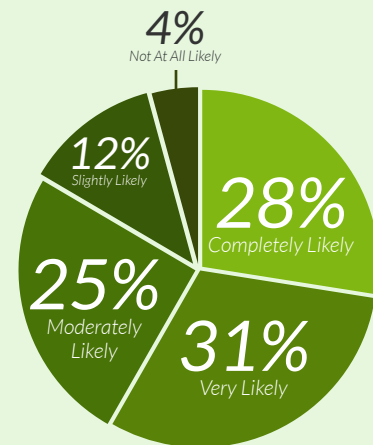
But will your displays and other POP materials rise to the occasion when football fans hit stores this fall? [There are several reasons in-store displays don't convert shoppers.](#)

As the images suggest, **Field Agent specializes in capturing in-store information about displays, signage, prices, planograms, and**

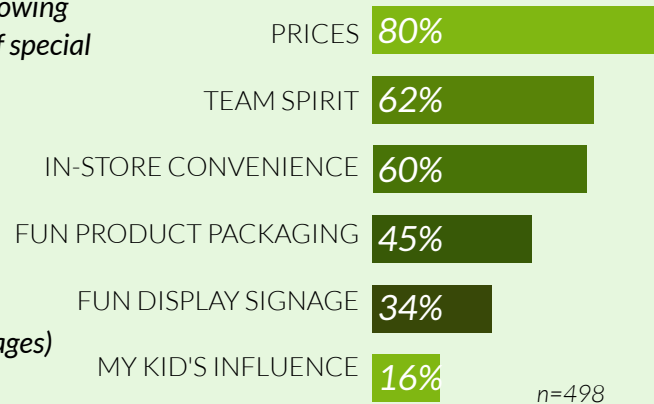
practically anything that matters to your retail execution.

From the opening kickoff to the Super Bowl, we're on standby to help you win points with football shoppers.

Based on your past experiences, what is the likelihood you will purchase products (e.g., food, beverages) from a **SPECIAL FOOTBALL-THEMED STORE DISPLAY** this season?



Which of the following characteristics of special football-themed **PRODUCT DISPLAYS** make you most likely to purchase products (e.g., food, beverages) from them?



n=498



Walmart - Mechanicsburg, PA

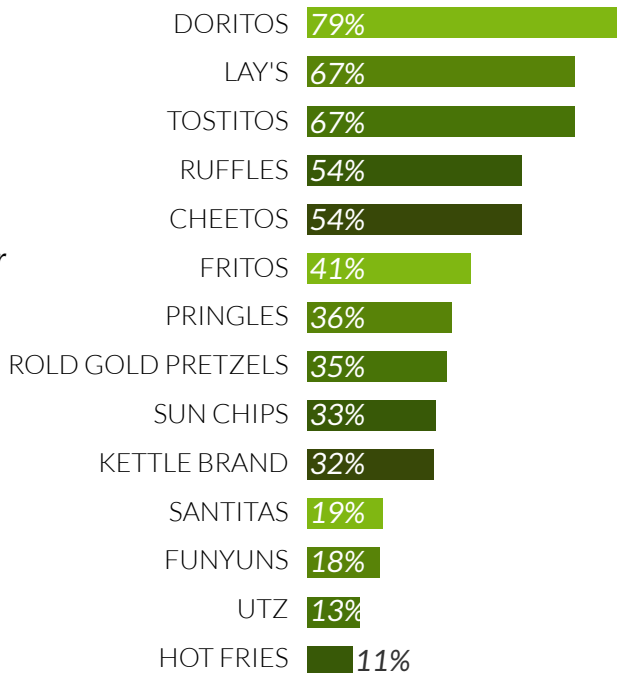


Walmart - Columbia, SC

## THE SALTY SNACKS & MEATS OF GAMEDAY

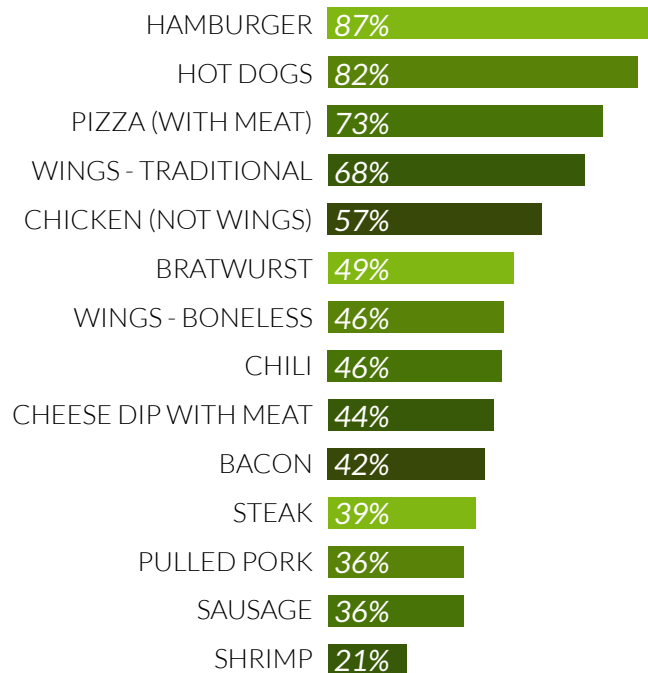
Which chip, pretzel, and, in general, salty snack brands are MVPs among football fans? Virtually the whole sample (n = 516) will buy salty snacks this season, with Doritos leading the way.

*Which of the following PACKAGED SALTY SNACKS will one or more members of your household LIKELY eat to enhance game-viewing during the football season?*



And what main courses will these snacks be served alongside? Most commonly, hamburgers (87%) and hot dogs (82%). Though, among those likely to serve meat or meat-based foods (n = 515) this football season, pizza (with meat), traditional wings (not boneless), and chicken (not wings) also put big numbers on the scoreboard.

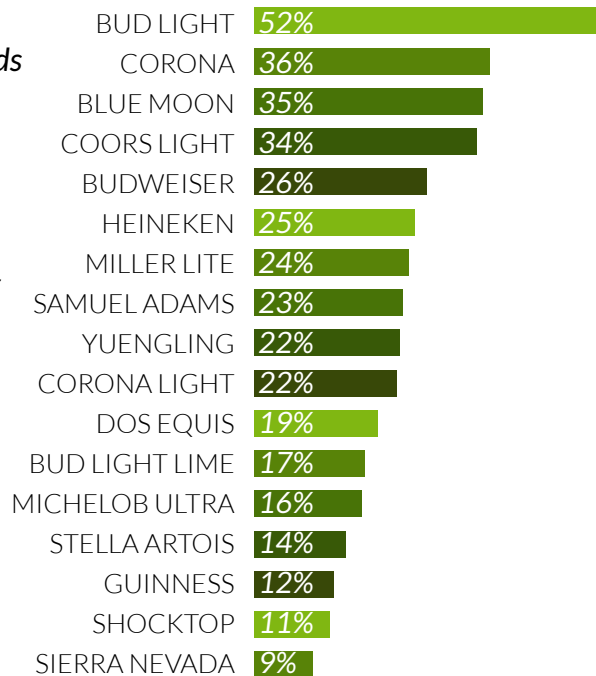
*Which of the following MEATS or MEAT-BASED products will one or more members of your household LIKELY eat to enhance game-viewing during the football season?*



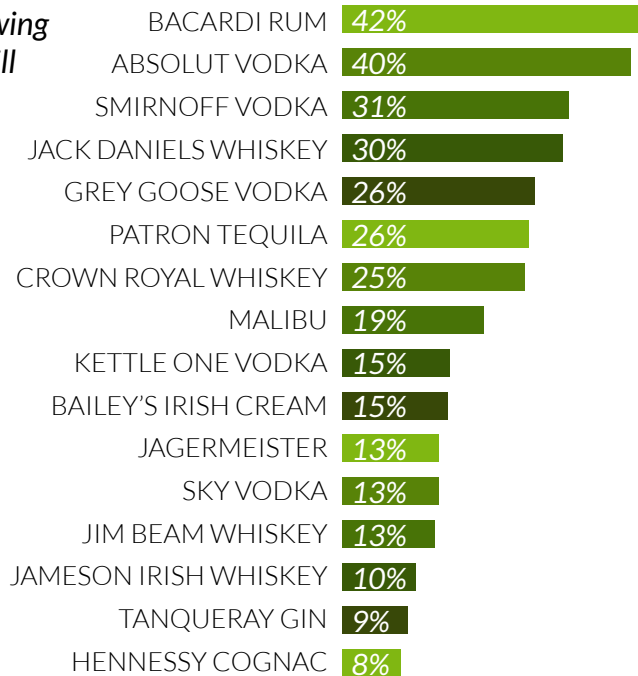
## THE BEER AND LIQUOR BRANDS OF GAMEDAY

In all, 85% of those surveyed said one or more members of their household will partake in beer (n = 444), and 74% in liquor (n = 386), to enhance the gameday experience. Of 50 beer brands, fans said they most prefer to wash down a game of football with Bud Light (52%), Corona (36%), Blue Moon (35%), Coors Light (34%), and Budweiser (26%). And among liquor brands, Bacardi Rum (42%), Absolut Vodka (40%), Smirnoff Vodka (31%), and Jack Daniels Whiskey (30%) took top honors.

*Which of the following BEER brands will one or more members of your household LIKELY drink to enhance game-viewing during the football season?*



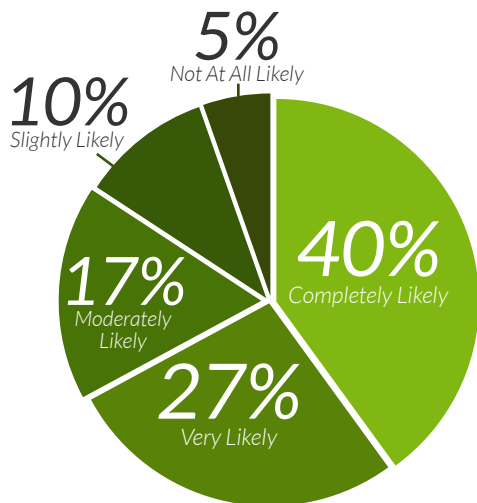
*Which of the following LIQUOR brands will one or more members of your household LIKELY drink to enhance game-viewing during the football season?*



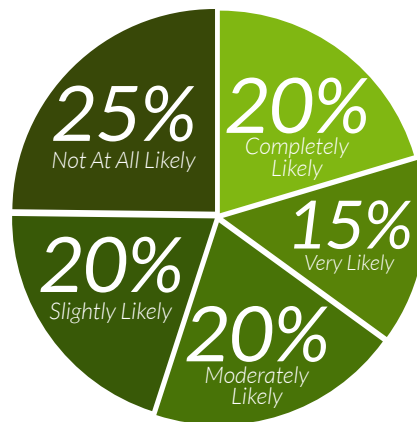
## THE GAMEDAY PARTY SCENE

For many, football is something to celebrate—with friends, family, and neighbors. In fact, in our survey, 67% said they're either completely or very likely to host a gameday viewing party this season, in which one or more individuals outside the household are invited. Moreover, 35% indicated they're completely or very likely to host a tailgating party at one or more football venues.

*What is the likelihood your household will host a gameday viewing party (i.e., watching one or more games) AT YOUR HOME this upcoming football season?*



*What is the likelihood your household will host a TAILGATING PARTY at a FOOTBALL VENUE this upcoming football season?*



## TAILGATING EATS & DRINKS

What are the food and beverage “must-haves” of a good tailgating party? We asked those at least slightly likely to host a tailgating party this season (n = 390). As the word cloud shows, beer, chips, dip, and wings are common tailgating fare. Very common.

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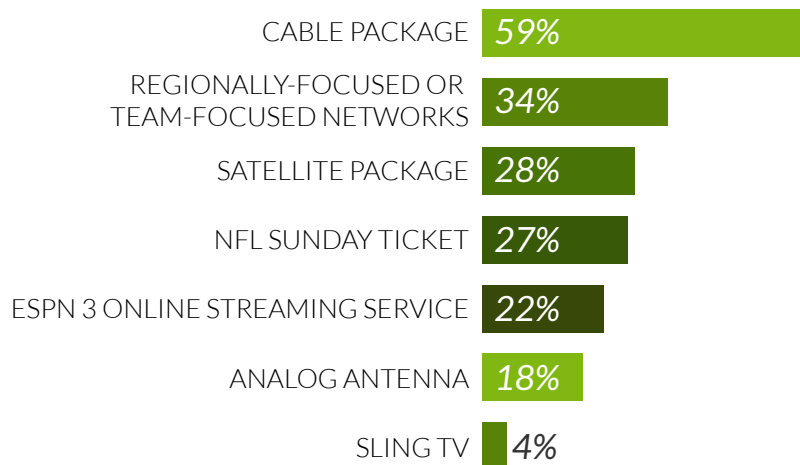




## GAMEDAY TV AND COMMERCIALS

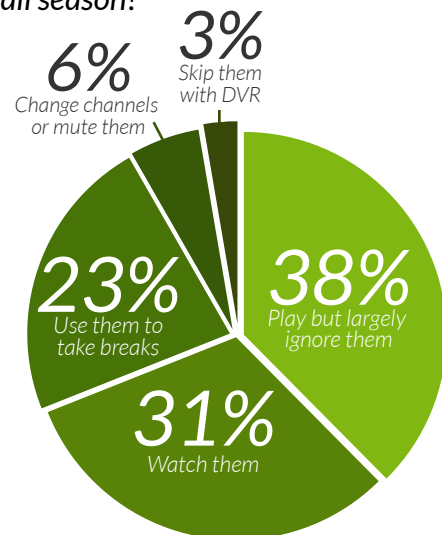
The game's on the TV, but how are football fans watching it? In our survey, cable (59%) beat satellite (28%); 27% will subscribe to NFL Sunday Ticket; and, 23% will root on their favorite teams through ESPN's online streaming service, ESPN3.

*By which of these means will one or more members of your household at least occasionally watch football games at your home during the upcoming season?*



Of course, TV commercials are part and parcel of most any football broadcast. We asked football fans which one statement best describes their behavior toward in-game commercials. 38% said they'll let them play but largely ignore them, while 23% said they'll use them to take breaks (e.g., restroom, snack).

*Which statement BEST describes how your household or party will treat TV commercials aired during the typical game during the upcoming football season?*



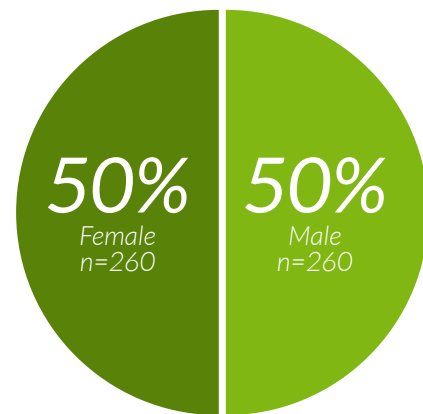
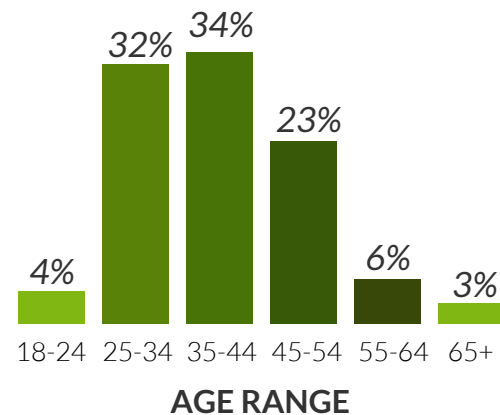
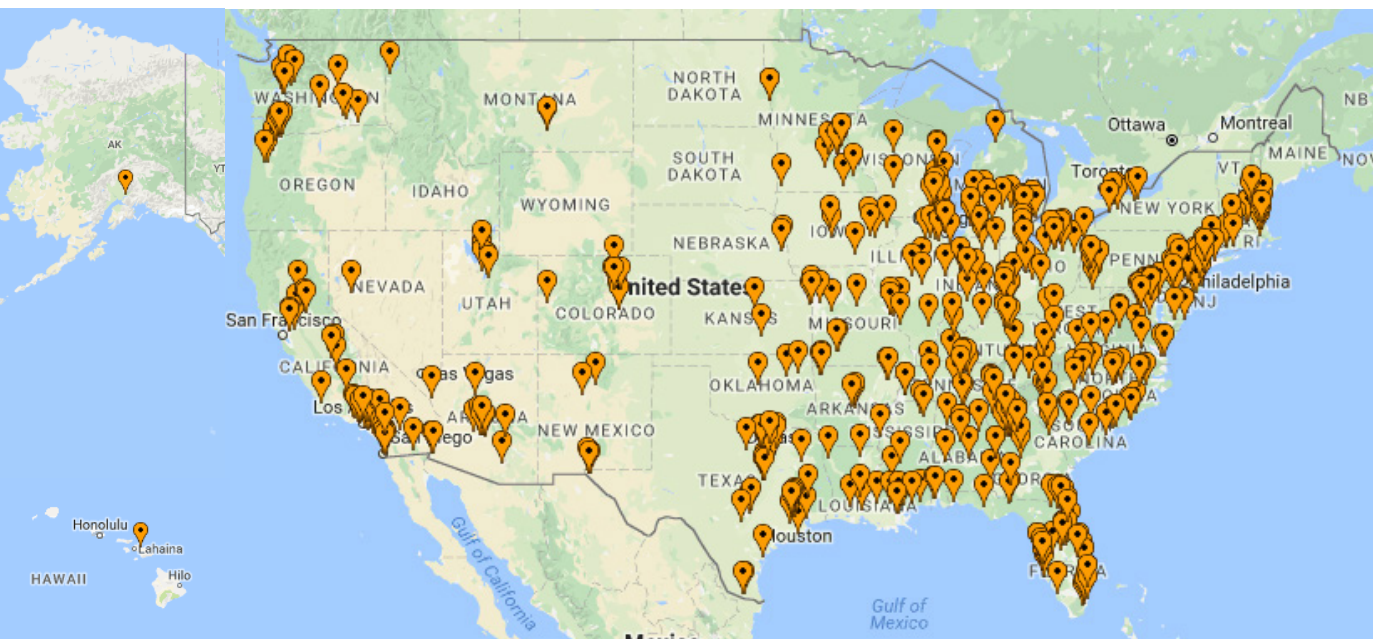
## OMNICHANNEL SERVICES

Omnichannel is all the rage right now, as retailers continue to adopt customer-focused digital services like curbside pickup, in-store pickup, and in-town, same-day delivery. Will such services get a boost from purchase-minded fans this football season? “Neutral,” neither more nor less likely, was the top response for each of the three omnichannel services presented. If these results are an indication, in-store pickup might get a bump from time-crunched football fans. Whereas 45% said they’re more likely to use this service when preparing for a gameday party, only 26% said they’re less likely.

Likeliness to Use Omnichannel Services for a GameDay Party			
	Curbside pickup services	In-store pickup services	Same-day, in-town grocery delivery
Much more likely	6%	6%	9%
More likely	13%	13%	13%
A little more likely	20%	25%	16%
Neutral	31%	30%	29%
A little less likely	8%	7%	5%
Less likely	7%	6%	8%
Much less likely	15%	13%	21%

# METHODOLOGY & DEMOGRAPHICS

Field Agent ran a screener to locate individuals who watch at least one college and NFL game each week of the football season. We then targeted 520 individuals, split evenly between men and women, with a 20-question mobile survey. It took 7 hours and 4 minutes to collect all responses, which streamed in from 46 different states.



# Field Agent Goes the Whole Nine Yards

Throughout the 2016-17 football season, Field Agent is on standby to capture location-specific information and insights from stores, stadiums, and practically anywhere else.

**From in-store display audits to in-home surveys, we have the plays to help your team win the championship.**

*Fast, Affordable, Far-Reaching Mobile Audits & Research*

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