

SCORE A TOUCHDOWN WITH FOOTBALL FANS:

What You Need to Know This NFL Season

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THE **RUNDOWN**

As the NFL season starts, brands from insurance companies to fast food chains are kicking off campaigns to reach football fans.

It's a huge marketing opportunity, and it's bigger than ever.

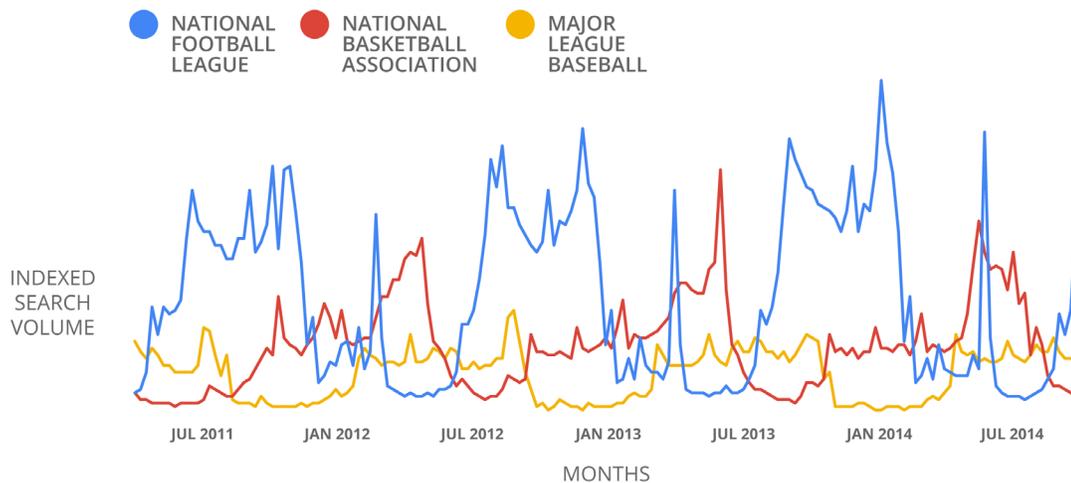
Worldwide, the NFL's popularity is at an all-time high. New audiences are tuning in, especially women and Hispanics, and fans are getting their fix across screens and platforms. Here, we tackle the trends that marketers should know to score with fans all season—and all year—long.

think with **Google**[™]

Searches for [HDTVs](#), [tailgating](#) and [buffalo wings](#) are up. That can only mean one thing: America is ready for some football. This year, the NFL is more popular than ever. It's now the most popular sports league worldwide—bigger than the NBA, MLB and any other international leagues.

- U.S. interest in the NFL is 65% higher than in the NBA and 152% higher than in the MLB, and it's on the rise (Chart 1).
- Even preseason events drew massive interest. The NFL Draft had [3x as many searches](#) as the Emmy Awards at their respective peaks.
- In 2012, the NFL [overtook the NBA](#) in global popularity, becoming the top American league in the world.
- It's also the [top sports organization globally](#), surpassing F1, Premier League and the India Premier League in searches on Google.

Chart 1: U.S. Searches for Top 3 American Sports Leagues



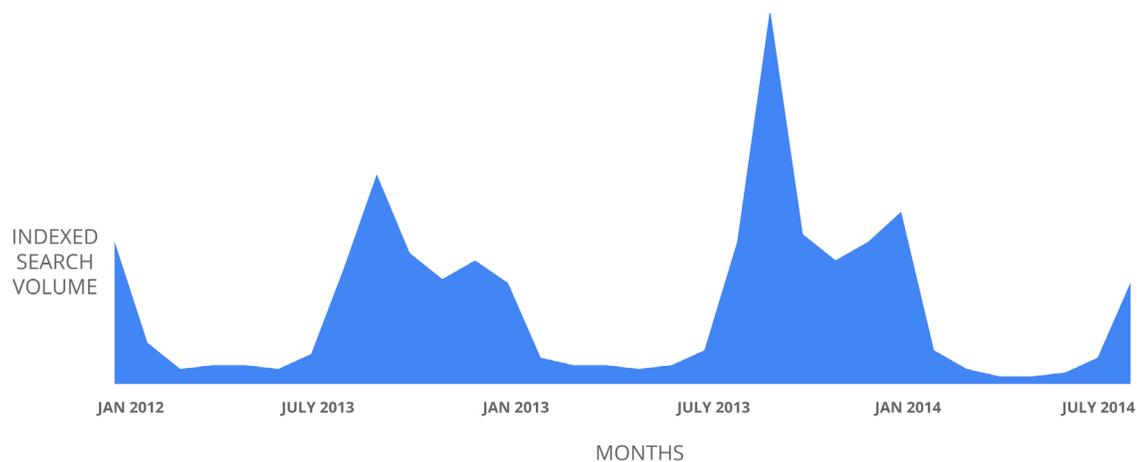
Source: Google Data, July 2011–September 2014, Indexed Search Query Volume, United States.

Football is winning over new audiences

The most watched TV event among women this year was the Super Bowl, according to [AdWeek](#). It's a sign of the NFL's increasingly diverse fanbase, now made up of more women and Hispanics than ever.

- During the 2013 season, searches for women's NFL apparel were 35% higher than the year before (Chart 2).
- Women make up nearly half of all NFL fans, and 63% of women 12 and older classify themselves as fans, per [AdWeek](#).
- In August, [searches for "futbol americano"](#) were 32% higher than they were the year before, outpacing the growth of overall football searches by 3.6x.
- Nearly half of Hispanics said they were interested or very interested in football (Google Consumer Survey, August 2014).

Chart 2: Google Searches for Women's NFL Apparel



Source: Google Data, January 2012–August 2014, Indexed Search Query Volume, United States.

Despite this, most marketing campaigns still cater to the (stereo)typical football fan. But there's massive opportunity to reach these new audiences. For its part, the NFL has answered and fueled demand among both of these demographics. Its Hispanic Heritage campaign celebrates Hispanic players in the league. Among efforts to reach female fans

are a line of women's apparel and a campaign to raise breast cancer awareness.

The needle is moving:

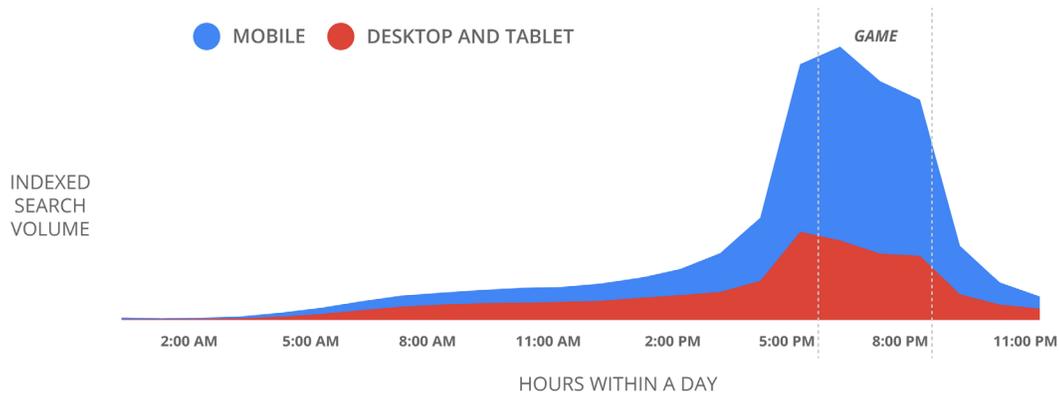
- In August, searches for women's NFL apparel grew 20% over the same period last year (Chart 2).
- At their respective highs, "NFL breast cancer" was [searched more](#) than "NFL concussions," a massively popular and controversial topic.
- People searched for the NFL and breast cancer twice as much as for any other major American sports league (Google Data).

Fans are glued to the second screen

On any given Sunday, fans all over the country are glued to their screen—the screen in their hand, that is. Smartphone use surges during the games as fans share the rush, talk trash and gather facts in the moment. Throughout the season, more people than ever are using mobile devices to find scores and schedules, even to stream games.

- Mobile queries related to football were up 33% in this year's preseason as compared with last year (Google Data).
- Top mobile searches include players, teams, schedules and scores, and they are all growing annually (Google Data).
- During games, there's a big surge in mobile searches. During last Thursday's Seahawks versus Packers game, for example, 74% of game-related searches came from smartphones (Chart 3).
- Searches are [spiking](#) for "NFL Now," the league's new mobile app that features highlights, clips and original programming.
- 1 in 3 searches about streaming the games comes from a mobile device (Google Data).

**Chart 3: Game-Related Searches During NFL Kickoff Game
(Seahawks vs. Packers, 9/4/14)**



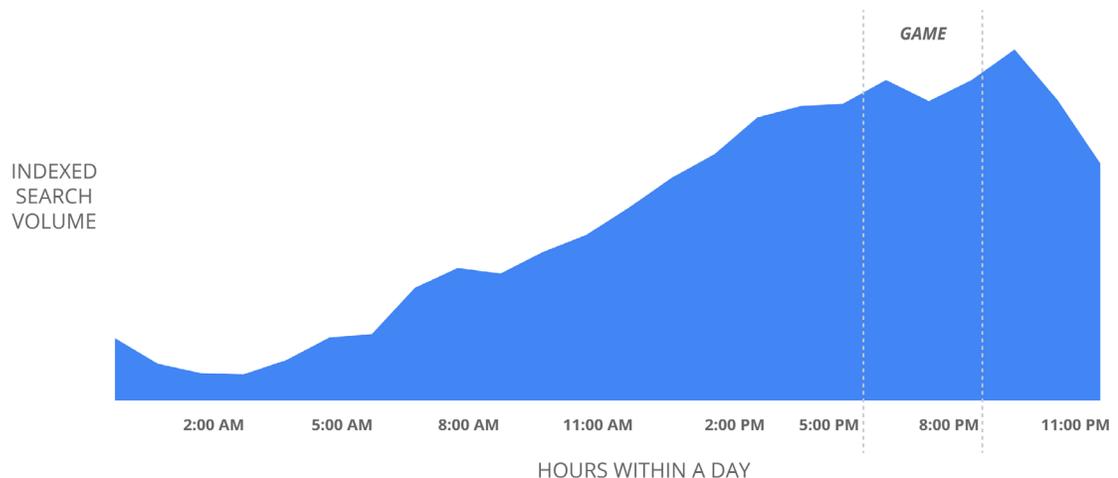
Source: Google Data, September 4, 2014, Indexed Search Query Volume, United States.

The implications are obvious: To reach fans, brands need to make mobile a key part of their playbook. Those that don't are putting themselves on the sidelines.

Searching for highlights, smack talking with GIFs

To catch up on “did you see that?!” moments, fans hop on YouTube immediately after the games end. For example, right after the Seahawks won this year’s kickoff game, searches for “highlights” spiked (Chart 4). In addition to video clips, people look for memes to share in the form of annotated GIFs. Just look at the sharp rise in searches for “NFL GIF” in the past few years.

Chart 4: YouTube Searches Related to “Highlights” After the NFL Kickoff Game (Seahawks vs. Packers, 9/4/14)



Source: Google Data, September 4, 2014, Indexed Search Query Volume, United States.

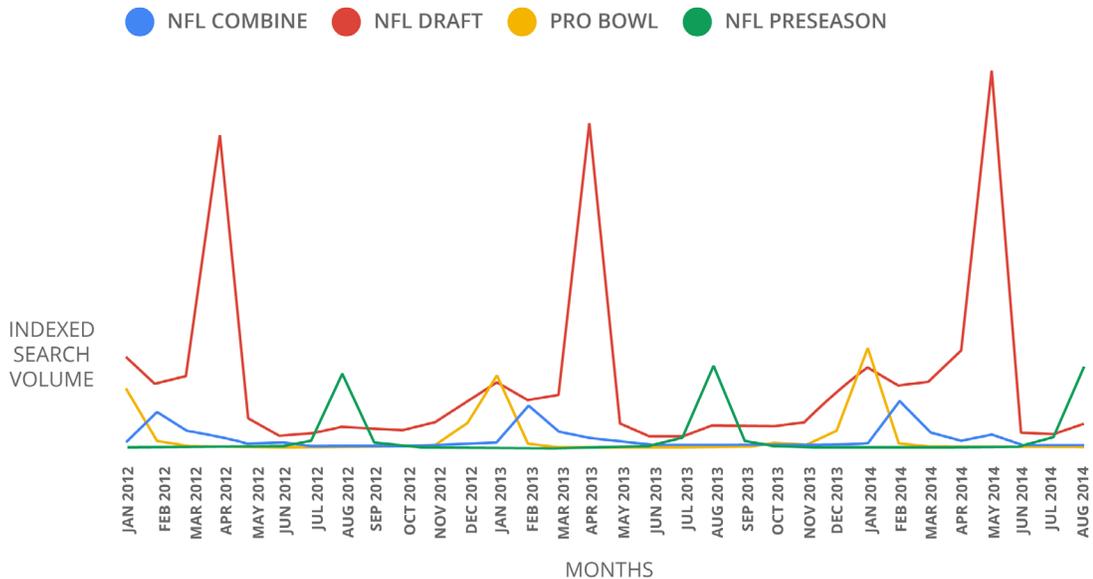
Video game content is also [hugely popular on YouTube](#), and when it comes to sports games, EA Sports' Madden NFL 15 is the reigning champ. The official ad for Madden NFL 15 topped the [August YouTube Ads Leaderboard](#)—it currently has over 10M views—beating out a new spot for FIFA 15.

To promote the game this season, EA Sports is reaching second-screening, meme-loving fans with the Madden GIFERATOR. For every NFL game, the Madden GIFERATOR's live stream of animated GIF's, which uses Madden NFL 15 imagery, updates in real-time based on actual NFL game action. With each big play, the GIFERATOR will generate a tailor-made set of GIFs to be customized and shared with friends. The GIFs will also appear in ads on sites and apps across the Google Display Network. Fans can even make and share their own.

More reasons for fans (and marketers) to cheer

The football season is longer than ever. While it peaks during the regular season, interest in football doesn't stop after the Super Bowl. There's now fan engagement (and marketer opportunity) in the off-season with the rise of "tentpole" events. The NFL Draft, Pro Bowl, NFL Preseason and NFL Combine all had their biggest year yet in searches on Google (Chart 5). Marketers can ride this rising tide of interest through year-round campaigns aimed at fans.

Chart 5: Google Searches for NFL Events During the Off Season



Source: Google Data, January 2012–August 2014, Indexed Search Query Volume, United States.

Meanwhile, CBS is doing a big push around Thursday Night Football, looking to make the game a primetime event. “I don’t think the CBS Corporation has ever mounted a larger promotional campaign,” says Sean McManus, chairman of CBS Sports, in the [New York Times](#). “We’re determined to work with the NFL to make sure this is a success.” It certainly seems to be driving interest online; Google [searches for “Thursday Night Football”](#) were up 50% year-over-year in August.

Then there’s fantasy football, which creates a whole new layer of engagement during the season itself. The once-niche pastime has become mainstream—[searches for “fantasy football”](#) are at an all-time high, and 1 in 3 people say they play, according to an August Google Consumer Survey. The typical fantasy player is a [marketer’s dream](#): a middle-aged, college-educated professional with an average household income over \$90,000, according to the Fantasy Sports Trade Association.

Fantasy players don’t just care about local teams; they’re obsessively tracking players across the league. This has essentially expanded players’ popularity beyond their home turf. For example, while the most-searched-for team around Kansas City is the Chiefs, searches for their star player, Jamaal Charles, are happening across the country.

In business terms, fantasy football attracts new audiences for many NFL “products” (players). No wonder it’s changed the NFL’s marketing. The league runs fantasy ads that appeal to non-experts with a proposition that “it’s fast and easy, and you can do it on a mobile phone”—a winning play in today’s constantly connected world.



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