



Insights exchange for the model-driven economy

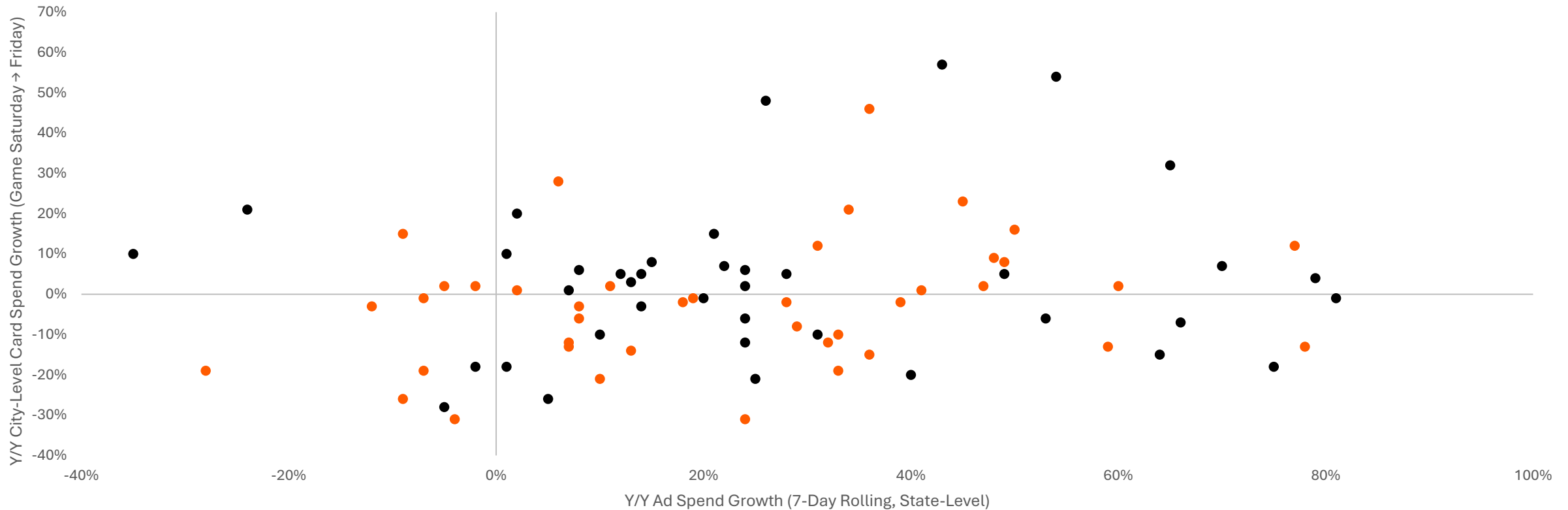
Football Kickoff Events Drive Category-Specific Consumer Response

- **Buffalo Wild Wings and Dunkin' see targeted spend lift; Arby's gains remain muted despite heavy ad investment**, highlighting the importance of brand–occasion alignment
- **FOX Big Noon Kickoff's product-centric Wendy's partnership drives stronger localized spend impact** than ESPN College GameDay's broadcast-focused Inspire Brands sponsorships
- **Chips, Pretzels, Crackers & Popcorns consistently show Y/Y spend lift around kickoff events**, reflecting strong alignment with football-driven demand and tailgating behavior
- **Coors Light (GameDay) outperforms Dos Equis (Big Noon Kickoff)**, highlighting the power of in-show and tailgate activations over broadcast/digital visibility alone
- **Markets with robust on-site activations, pre-game gatherings, and tailored sponsorships see the largest incremental POS gains**, underscoring that sponsorship success is context- and category-specific

QSR Ad Spend Spikes Don't Consistently Translate to Local Spend Lift

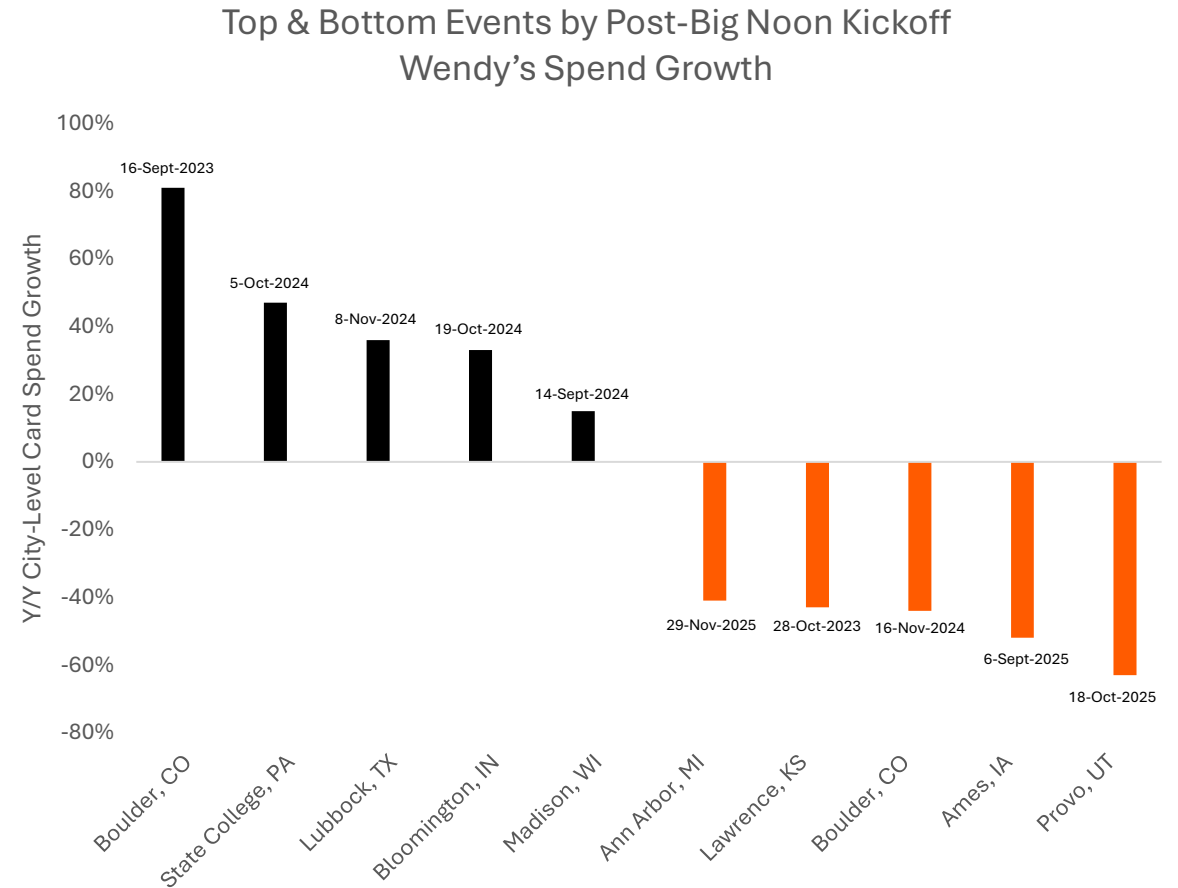
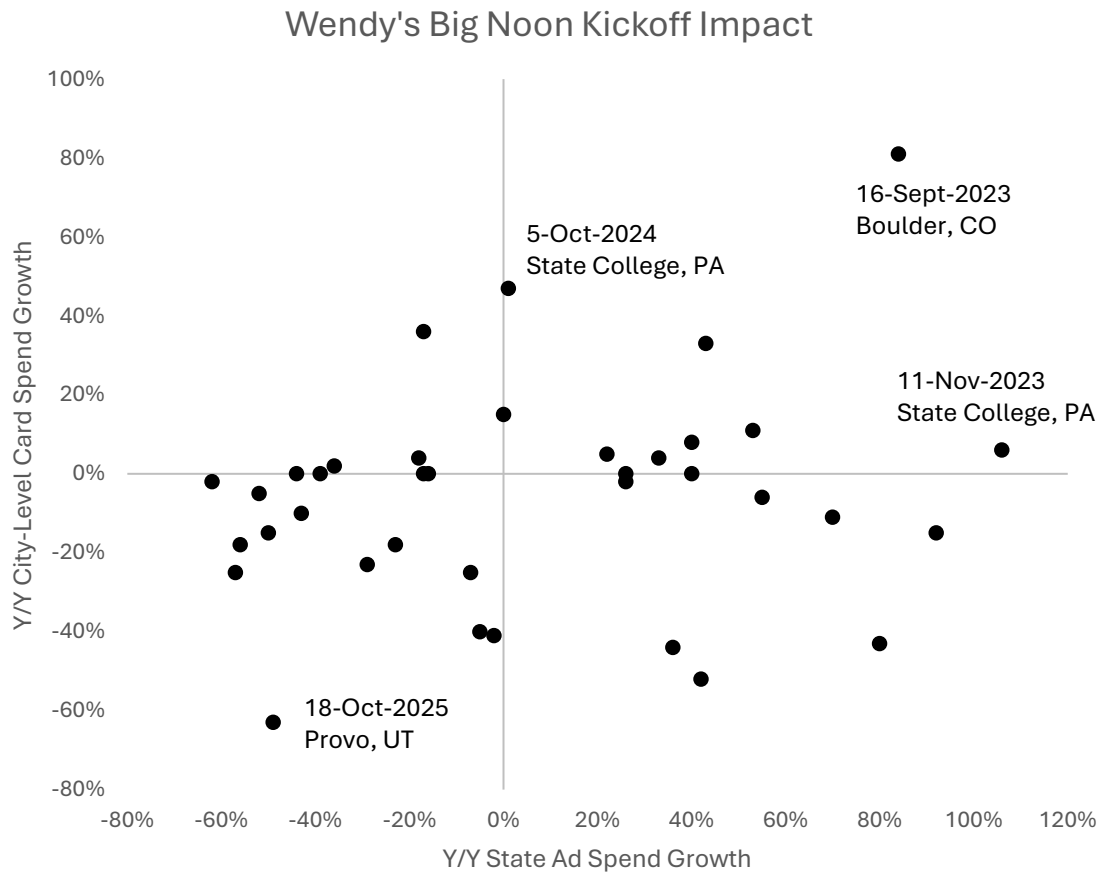
QSR ad spend surrounding College GameDay and Big Noon Kickoff events does not consistently translate into higher local consumer spending. The wide dispersion of outcomes, particularly among high ad-spend week, highlights meaningful variability by market, execution, and competitive context.

QSR Ad Spend vs. Local Spend Growth Around College Football Kickoff Events



Wendy's Big Noon Kickoff Sponsorship: Advertising vs. Local Spend Response

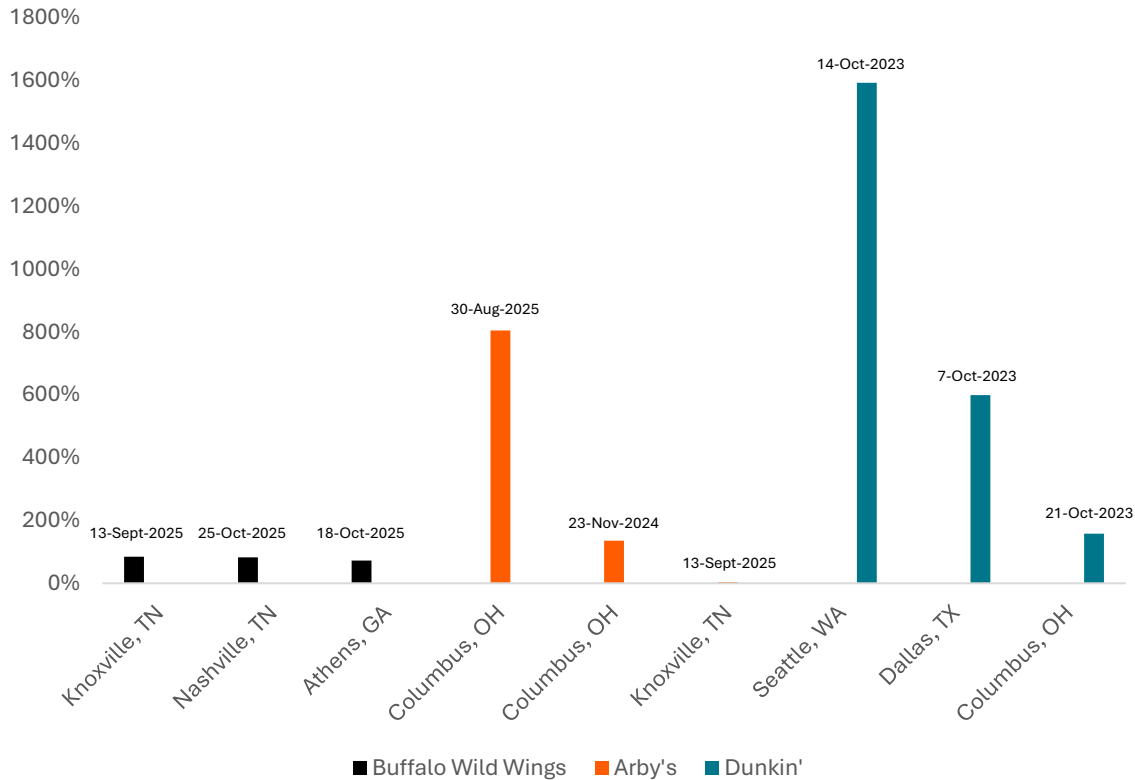
Wendy's Big Noon Kickoff partnership (launched 2023) shows strong but variable local impact: Boulder, CO (+81%) and State College, PA (+47%) led spend growth, while Provo, UT (-63%) and Ames, IA (-52%) lagged. Differences reflect fan engagement, market density, and the effectiveness of product-focused in-market activations.



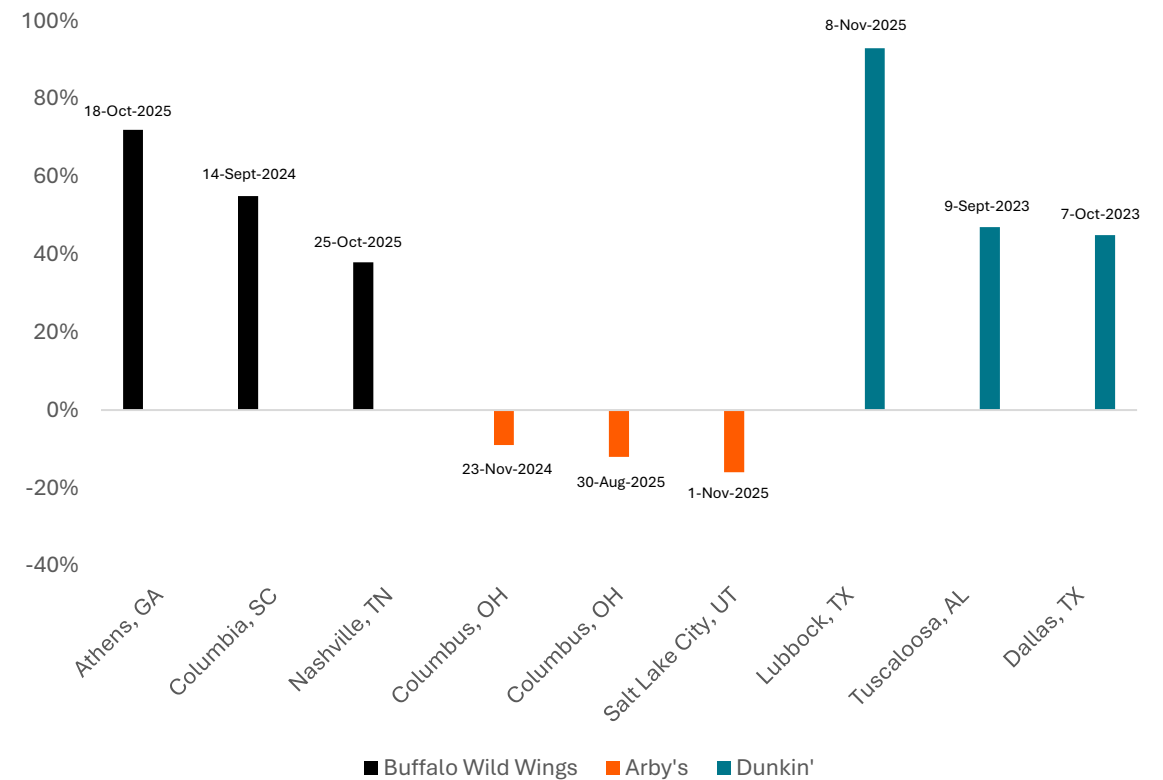
Why ESPN College GameDay Ads Don't Always Show Up at the Register

Unlike FOX Big Noon Kickoff's product-driven Wendy's partnership, ESPN College GameDay sponsorships prioritize broadcast integration and fan experience over direct consumer promotions. As a result, even large localized ad spikes, especially for Arby's, do not consistently convert to spend lift, while more game-day-aligned brands like Buffalo Wild Wings and Dunkin' see selective upside.

Top College GameDay Events by Y/Y QSR Ad Spend Growth



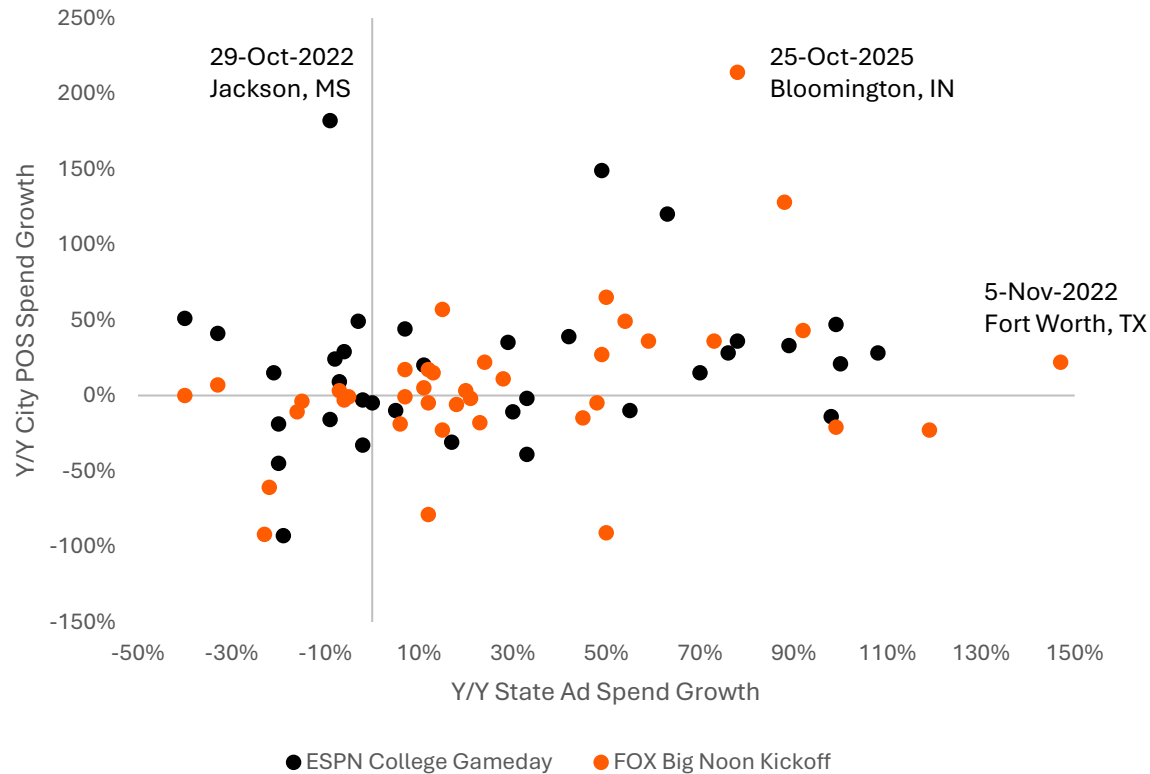
Top College GameDay Events by Y/Y QSR Card Spend Growth



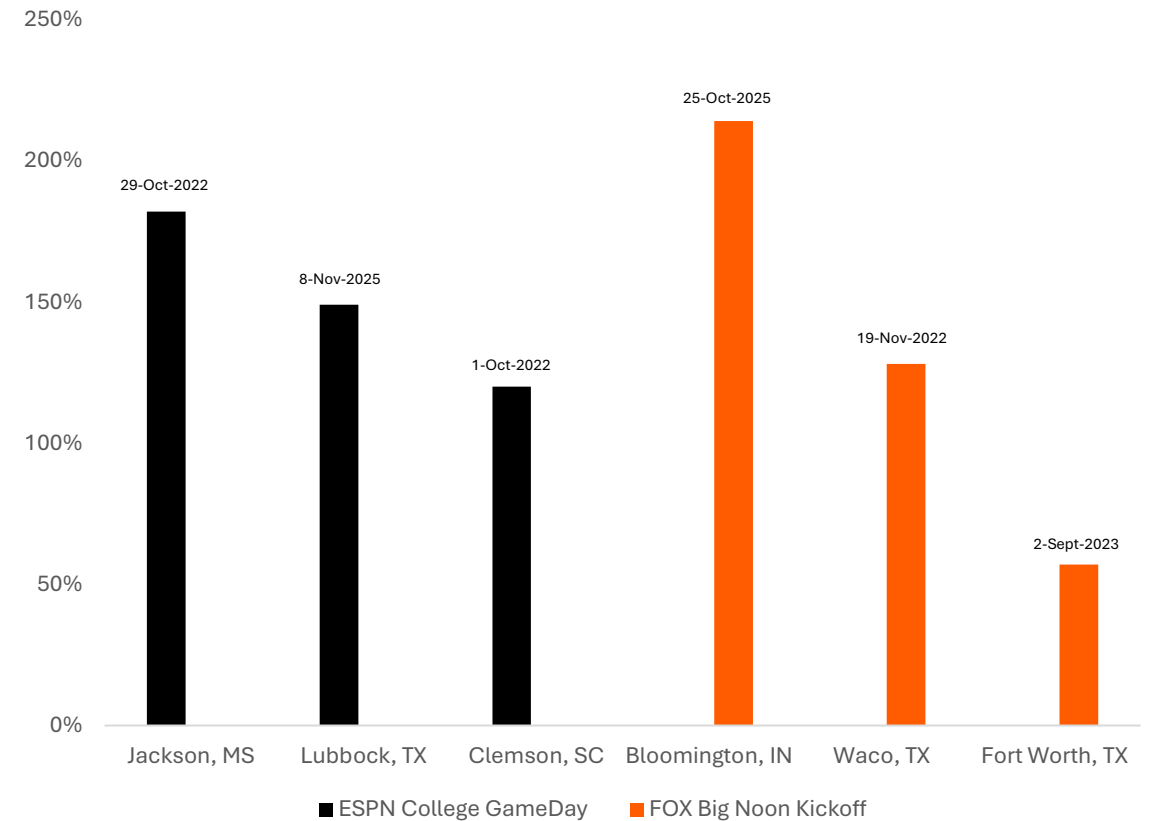
Unlike QSR, Tailgating Snacks See Clearer GameDay Spend Upside

Because Y/Y comparisons benchmark against the same football Saturday in the prior year, elevated POS spend around College GameDay and Big Noon Kickoff reflects incremental lift relative to historical game-day norms rather than broader seasonality alone.

Chips, Pretzels, Crackers & Popcorn POS Spend Impact:
GameDay vs Big Noon Kickoff



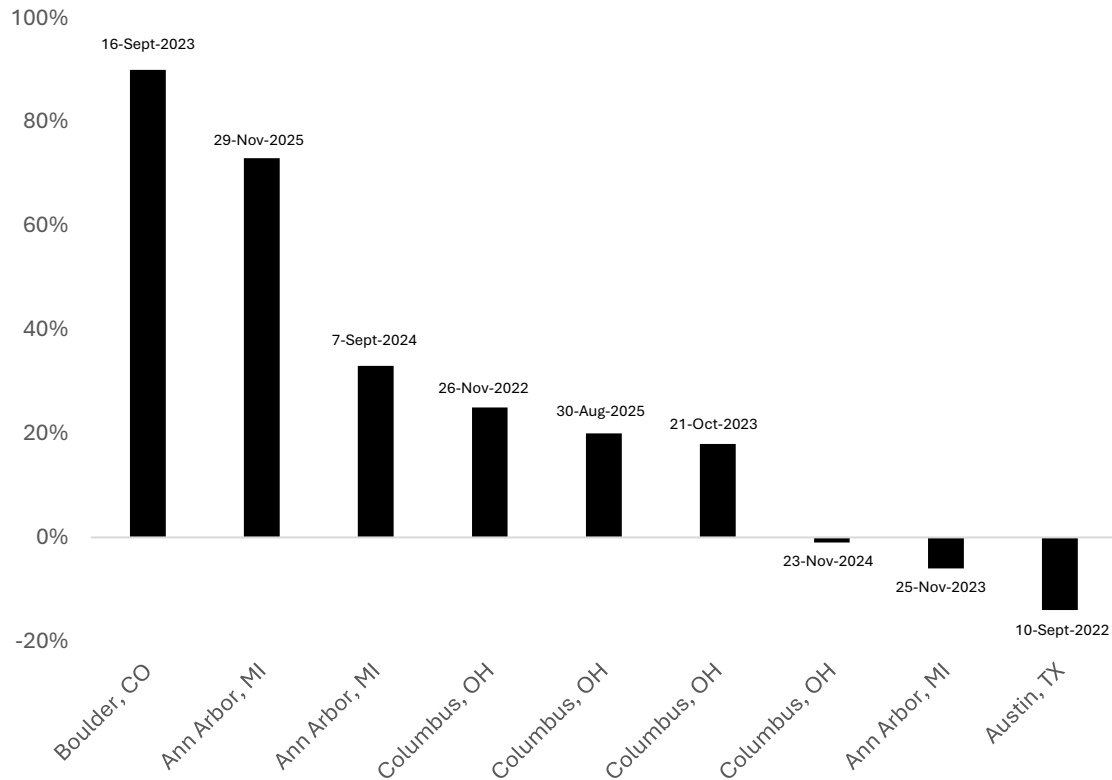
Top Kickoff Events by Y/Y POS Spend Growth



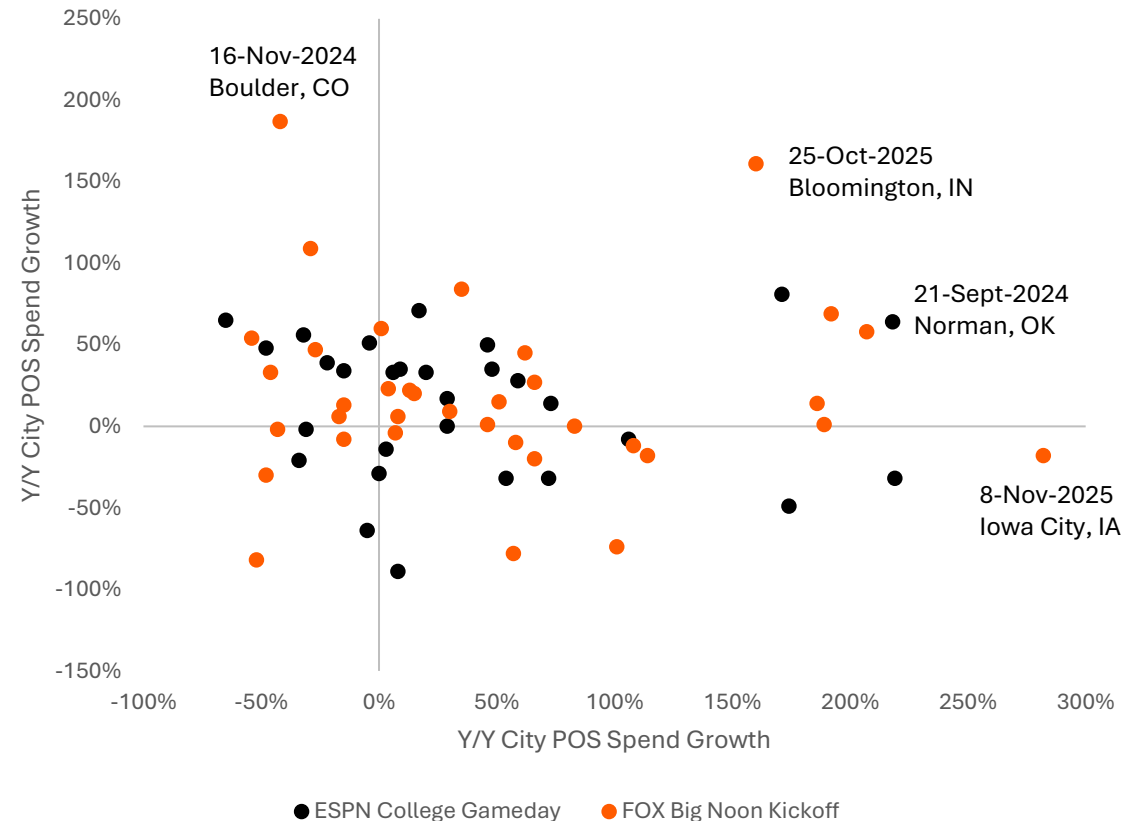
Kickoff Events Drive Beer Sales, but Impact Varies by Market

Beer convenience POS shows clear lift around kickoff events. When College GameDay and Big Noon Kickoff share a city, most markets see strong Y/Y gains, highlighting how local fan engagement and nationally amplified tailgating shape pre-game and game-day purchasing.

Y/Y Beer Convenience POS Spend Growth When Kickoff Events Share a Location



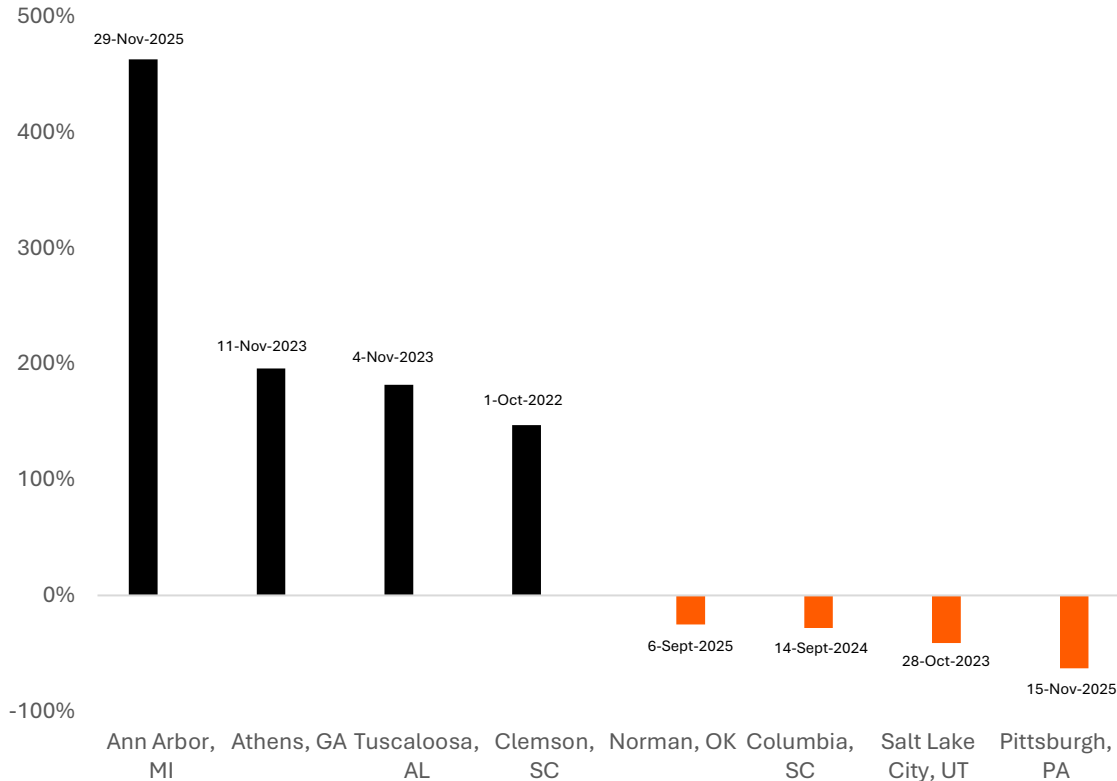
Beer POS Spend Impact: GameDay vs Big Noon Kickoff



Beer Sponsorships and Game Day Dynamics: Coors Light vs. Dos Equis

Coors Light (ESPN College GameDay) and Dos Equis (FOX Big Noon Kickoff) anchor official beer sponsorships with distinct styles: Coors Light leverages in-show integration and tailgating engagement, while Dos Equis emphasizes broadcast and digital visibility. Coors Light drives stronger, more consistent Y/Y convenience POS spend, whereas Dos Equis shows muted, variable gains, highlighting how activation style shapes local consumer response.

Top and Bottom GameDay Events by Y/Y Coors Light Convenience POS Spend Growth



Top and Bottom Big Noon Kickoff Events by Y/Y Dos Equis Convenience POS Spend Growth

