

# inMarket insights

## Casual Dining Chains are the Real Winners of Spring Training in AZ, FL

Spring Training is big business for many cities in Florida and Arizona, as teams and their fans make the annual pilgrimage out of the cold to celebrate baseball and sunshine. The Baltimore Orioles, for example, [generated over \\$89MM](#) in economic output for their winter home of Sarasota, FL. The state as a whole drew over 1.5MM fans in 2016 — setting [a 100-year high](#), according to Gov. Rick Scott.

While teams like the Orioles measure their economic output through official sporting + cultural events and its promotion of Sarasota tourism, they (and other teams) might actually be selling themselves short. There's a nice side effect that happens when you're drawing tourists from all over the U.S.: They spend lots of money at in-state and in-city businesses — specifically restaurants.



At inMarket, we use first-party, always-on location data from over 50MM unique devices and 700+ apps to understand foot traffic patterns at retail, restaurants, bars, salons and more. Based on that data, we've ranked all of the Florida and Arizona restaurant chains based on their **share of visits (SOV)** during spring training. A positive (+) number indicates the SOV is higher than average, while a negative (-) number indicates that the SOV is below average. This helps us to understand how restaurants are performing relative to their size and number of locations.

Here's a look at how FL and AZ restaurants performed during spring training 2017:

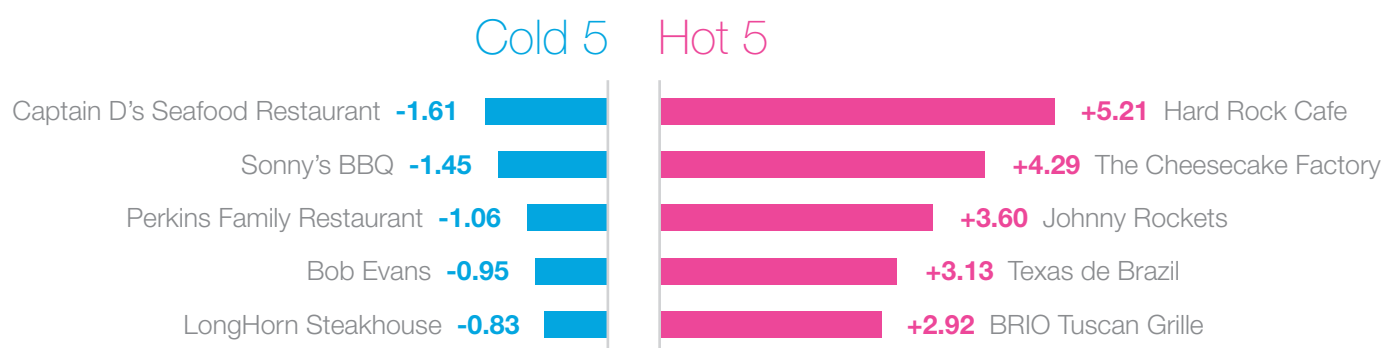
\*inMarket uses first-party location data from an audience of 50MM monthly active app users in the U.S., as verified by comScore.



# Who Won the Grapefruit League?

Spring training revelers in Florida appear to be looking for fast, casual, family-friendly places to dine. In March 2017, the **Hard Rock Cafe** outpaced all casual dining restaurants in Florida with a SOV of +5.21 over the average. **The Cheesecake Factory** followed up with a +4.29 SOV, while **Johnny Rockets** placed third with a +3.60 SOV. Rounding out the top five casual dining establishments were **Texas de Brazil (+3.13)** and **BRIO Tuscan Grille (+2.92)**. On the opposite end of the spectrum, Captain D's Seafood Restaurant struggled to a -1.61 SOV, while Sonny's BBQ checked in with a -1.45 SOV.

**Bonus:** With one Florida location, **Bobby's Burger Palace** is thriving with a whopping +12.95 SOV in March — outperforming “better burger” chains like Smashburger (-1.15) and Five Guys (-0.66) by a wide margin. Based on that performance, we expect they'll expand in Florida in the near future.



# Who Won the Cactus League?

In Arizona, Scottsdale-based **Kona Grill** led all casual dining restaurants with a +4.08 SOV. The Asian/American eatery was followed by burger throwback **Johnny Rockets** (+4.04) and draft beer-centric sports bar **Yard House** (+4.02). Johnny Rockets is the only restaurant chain to place on both Florida and Arizona rankings. **RA Sushi** (+1.13) and coastal-inspired fresh Mexican chain **Rubio's** (+0.56) round out the top five for SOV. Casual chains LongHorn Steakhouse and Cracker Barrel both struggled, netting -1.05 and -0.90 SOV respectively.

**Bonus:** The lone **Tim Hortons** location in Arizona (yes, you read that right) appears to be incredibly popular, achieving a +3.88 SOV.

