Executive Summary

In 2020, LEARFIELD began compiling the largest data and analytics platform in college sports, Fanbase™. Analyzing first-party fan data along with syndicated data from partners, we have developed new insights into the college sports fan landscape and the characteristics shared by the most engaged fans and have compiled them in this inaugural LEARFIELD Intercollegiate Fan Report™.

Research reveals there are more college sports fans in the US than there are fans for any professional league. Over 182 million individuals across all 50 states have a favorite college team or teams that they follow regularly, with 65.5% of the teen and adult population (age 12 and older) identifying as college sports fans.

Specifically, the Known Fans™ in LEARFIELD’s Fanbase data platform shed new light on the most enthusiastic and engaged fans. The analysis reveals a few key themes:

1. College sports fans are the largest and most affluent fan base.

2. The college sports fan is well-represented across genders and ages.

3. The college sports fan is demonstrably avid and loyal across all Designated Market Areas (DMAs) that brands can target.

For brands and marketing companies, the implications of this research are significant, as college sports fans have proven spending power and an unrivaled affinity for their teams. These fans are 1.6 times more likely to have incomes higher than $100K compared to the overall US population.

In addition, 42% of fans identify as female and make up more than half of social media followings of colleges and universities. The economic spending power of Female Known Fan households is upward of $530 billion per year. Across both men and women, fans spend approximately $3.5 billion annually on college licensed apparel and merchandise alone—representing an enormous market.
Report Highlights

1. **College sports fans are the largest and most affluent fan base.**

   Known fans have significantly higher incomes compared to the US population. Brands can reach a population that is 1.6x more likely to have incomes greater than $100K compared to the US population - providing an opportunity to reach fans with more disposable income. By engaging in college sports marketing, marketers can reach a sizable high-income fan audience.

2. **The college sports fan is well-represented across genders and ages.**

   42% of fans are women. The high-value age groups between 35-to-54-year-old are well represented. Female fans are more likely to be engaged on social media, providing a great avenue to reach fans who wield $530 billion in economic spending power annually. More than 31% of female Known Fans have incomes greater than $150K.

3. **The college sports fan is #1 Most Avid Fan base across every part of the US.**

   From large metro areas to rural counties, their fandom lives wherever they live. In 2020-2021, over 538 million households (unduplicated) viewed NCAA college football and men's basketball, along with a combined 69 million fans who attended games in 2019. Fans spend over $3.5 billion a year on collegiate licensed merchandise. The passion of college fans can translate directly to affinity for brand sponsors and licensees.

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Introduction

The college sports fan is a figure of legend. Many imagine a middle-aged man traveling across town to attend a game of their alma mater, decked out in college gear, or listening to the game on the radio. The actual characteristics of college sports fans are both surprising and significantly more interesting for brands. This report provides a never-before-seen analysis that reframes the picture of college athletics fandom.

Just like in other industries, the college sports marketing industry has undergone a significant transformation in the past few years. Driven by technology advancements and accelerated by the pandemic, the digital transformation of college sports marketing has become a reality. The data supports the growing need for an omnichannel media approach to reaching fans with relevant and compelling brand messages.

While much has changed, the loyalty and affinity that college fans have for their favorite teams has not wavered. It’s nothing short of passion. It’s nearly impossible to walk a block in a major city without seeing evidence of fan loyalty in the form of licensed gear and apparel. This represents extreme brand preference, and what brands in all categories aspire to: sticky loyalty, passed through generations and built on rich traditions, memories, experiences, and authentic relationships. College sports are a true community and brands that engage with fans can experience the glow of that halo in their marketing efforts.

This report is the first of its kind and the first time that tens of millions of college fan data records have been aggregated and analyzed. It is the first and most complete picture of what constitutes a college fan and how brand marketers and business leaders should think about engaging this audience as part of their marketing strategy.
LEARFIELD has assembled first-party fan data that reveals in-depth insights about the overall US college fan base of 182 million. In order to better understand the College Sports Fan, we’ve completed a number of demographic analyses, including population size compared to professional sports, age, gender, income, location, and social media presence.

Behind this analysis are over 20 million Known Fans™ from Fanbase™, LEARFIELD’s preeminent data and analytics platform for college athletics. These are the most enthusiastic and engaged fans who have a direct relationship with the school through ticket purchases, donations, sign-ups, and other transactions. In addition to the 20 million Known Fans that comprise LEARFIELD’s first-party fan data, Fanbase also includes 130+ million ‘digital’ or ‘anonymized’ fans, who are reachable based on their official athletic website engagement. In this report, these 150+ million records are supplemented with general information about the college sports fan (through syndicated research) and, for a comparison baseline, US population statistics. This inaugural report primarily focuses on the Known Fan and is a foundation for future inquiry.
College Sports Fans Are the Largest Group of Sports Fans in the US

College sports fans are the largest fan population in the US. The figure below shows the percentage of individuals in the US that are 12 years and older, and whether they identify as “fans” of major sports, and “avid fans” of major sports. Those identifying as College sports fans (overall) rank the highest in both categories—both in terms of absolute numbers and as a percentage who are “avid” fans.

Estimates put the audience for college sports at upward of 182 million, including 155 million for football, 130 million for basketball, and 105 million for other college sports. This population size translates into real opportunity for brands that can engage the largest fan audience of any sports organization or league, leveraging highly personal marketing campaigns to reach fans of particular schools to build affinity between the college brand and that of the sponsor.

The chart below indicates the percentage of US individuals over 12-years-old who identify as a fan of the following teams or leagues and the percentage who identify as avid fans. College sports fans top the ranking.

<table>
<thead>
<tr>
<th>Identified Fans by Major Sports</th>
<th>Fans</th>
<th>Avid Fans</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>College Sports (overall)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NFL</td>
<td>26.3%</td>
<td>64.6%</td>
</tr>
<tr>
<td>MLB</td>
<td>24.3%</td>
<td>57.7%</td>
</tr>
<tr>
<td>College Football</td>
<td>20.7%</td>
<td>51.6%</td>
</tr>
<tr>
<td>NBA</td>
<td>16.2%</td>
<td>47.5%</td>
</tr>
<tr>
<td>College Basketball</td>
<td>13.6%</td>
<td>40.1%</td>
</tr>
<tr>
<td>NHL</td>
<td>8.0%</td>
<td>39.2%</td>
</tr>
<tr>
<td>UFC</td>
<td>6.4%</td>
<td>38.2%</td>
</tr>
<tr>
<td>Other College Sports</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NASCAR</td>
<td>7.2%</td>
<td>34.9%</td>
</tr>
<tr>
<td>MLS</td>
<td>6.1%</td>
<td>34.5%</td>
</tr>
<tr>
<td>PGA</td>
<td>6.0%</td>
<td>30.2%</td>
</tr>
</tbody>
</table>

INSIGHT Brands can leverage highly-personalized marketing campaigns to reach fans of particular schools to build affinity between the college brand and that of the sponsor.
College Sports Fans Span Key Age Demographics

Assessing the ages of Fanbase Known Fans provides a helpful perspective on the demographics of the college sports fan. Based on first-party data, Known Fans are much more likely to be in the 35-64 year-old age range than the general population.

**Note:** We understand anecdotally that the 18-25 year-old audience is attractive and well-represented among college fans, but have excluded them from this report. There are difficulties collecting reliable data for this age group, many of whom are college students. Due to student data privacy and varying methodologies by which universities retain robust ticketing data for their students, we chose to omit this age group to ensure the integrity of the report data, except for social media reporting (where more reliable age information is available).

The figure below reveals what percentage of Known Fans fall into age brackets and compares those percentages with the US population in the same age ranges.

An index number represents the value of one number compared to another. It’s calculated by adding 100 (the baseline value) to the percentage change between the two figures. For instance, a 31% difference equates to an index of 131. An index of 86 equates to a negative 14% difference.

Known Fans are approximately 1.3x more likely (represented by an index of 131) to be 45-54 years old compared to the US population (21% versus 16%). This age group, disproportionately represented among college sports fans, has the highest per-capita discretionary income, making them more likely to spend on college sports events, donations, and merchandise, as well as with corporate partners.
Statistically, this age group has children of middle-school and high-school age living at home, with influence over their children’s purchasing behavior and brand preferences.

Overall, 38% of Known Fans have children under age 18, which is slightly under the US population percentage of 40%, per the 2020 US Census data. In the age bracket of 45-54 years, 56% of Known Fans have children at home.

Fans in these age brackets are at their peak income earning years and have started to shift their spending from basic necessities to luxuries, goods, and services that express their unique interests and identities.

**35-to-54 Age Group Comparison of Known Fans to US Population**

<table>
<thead>
<tr>
<th>Ages 35-54</th>
<th>All Other Ages</th>
</tr>
</thead>
<tbody>
<tr>
<td>33%</td>
<td>67%</td>
</tr>
<tr>
<td>39%</td>
<td>61%</td>
</tr>
</tbody>
</table>

In the 35-54 age bracket, the percentage of Known Fans is 6% higher than the total US population.
Social media engagement among official athletic social channels reveals that the audience skews younger, as shown in the figure below.

Social Media Engagement by Age Group

![Social Media Engagement by Age Group](image)

Approximately 65% of Social Followers are aged 18-44 compared to 33% of Known Fans. This means that social media followers are 1.97x more likely to be aged 18-44 than the overall Known Fans. This reinforces the notion that social media is a compelling way for brands to engage with this specific age range of fans.

Isolating the fans that are also social media followers reveals overrepresentation among the younger fan demographics compared to the US population—meaning that younger college sports fans are more likely to follow their favorite teams on social media.

While there is relative skew toward younger fans, it’s important for brands to recognize that fans of all ages engage on social media (19.1% of followers are over 55). Engaging the college sports fan across multiple generations is possible through official social account content and social activations of omnichannel campaigns.

**INSIGHT**

Very few marketing channels offer true multi-generational reach to brands, while still allowing unique messaging and targeting to different personas.
College Sports Attracts All Genders

42% of Known Fans are female, compared to 51% of the US population overall.

This population of Female Known Fans is significant and there is additional opportunity to grow the fan base. This could also translate into growing sponsorship opportunities for women’s athletics at the college level.

Interestingly, 48% of social media followers for college sports teams are female, which outpaces the percentage of female Known Fans overall. The figure below shows that female Known Fans over-index (114) compared to their male counterparts in terms of social media engagement. Female fans on social media provide an opportunity for brands to focus on female-centric digital content as an increasingly effective means of engagement.

This data is consistent with what Pew Research has found for female engagement on social media overall, with women engaging 12% more than men across social platforms.

**INSIGHT**

Female fans on social media provide a clear opportunity for brands to focus on female-centric content as an increasingly effective means of engagement.
In addition, college sports fans significantly over-index compared to professional sports leagues with the percentage of female social followers by sport. This differentiates collegiate athletics from other sports leagues. Given the close ties (potentially due to individual or personal family relationships with universities, where student populations have been trending female), women are much more likely to follow their favorite college sports teams than professional teams.

According to the NYU Female Sport Fandom report of 2020, women purchase 46% of official NFL merchandise and spend 80% of all sports apparel dollars. Moreover, women control 60% of all money spent on men’s clothing. There’s valid reason to believe this pattern of women’s influence on household spending extends to the collegiate level, further showcasing the important influence of the female college sports fan.

There are also reasons to believe that the percentage of female college sports fans is actually understated, due to the fact that many women’s sports at the college level are unticketed—which leads to less fan data collection and fewer opportunities to cultivate meaningful sponsorships. This could be a significant opportunity for schools and brands to explore in the near future.
College Sports Fans Wield Spending Power

College sports fans have significantly higher income levels compared to the general US population.

Almost 50% of Known Fans have incomes over $100K, compared to only 31% of the US population, an index of 159. Given the size of the fan audience across college sports, this represents more spending power than professional sports fans.

INSIGHT

Almost 50% of Known Fans have incomes over $100K, compared to only 31% of the US population, an index of 159.

Income Comparison of Known Fans to US Population

<table>
<thead>
<tr>
<th></th>
<th>Income &lt; $100K</th>
<th>Income &gt; $100K</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. Population</td>
<td>50.1%</td>
<td>49.9%</td>
</tr>
<tr>
<td>Known Fans</td>
<td>68.6%</td>
<td>31.4%</td>
</tr>
</tbody>
</table>

SOURCE: US Census 2019, LEARFIELD Fanbase
The chart below shows different income brackets for Known Fans compared to the general US population. Unsurprisingly, the Known Fan is significantly more likely to earn more than $50K compared to the US population, and significantly more likely (200 index) to earn above $200K compared to the general US population.

This proves that while the college sports fan is more likely to have higher incomes, the difference continues to grow disproportionately among the top earners (the index grows from 131 to 157 to 200 when moving from $100K-$150K, $150K-$200K, and $200K+). Given the size of the fan audience and the proportion of fans with incomes over $100K, there’s simply no other fan audience that matches the breadth of the college sports fan. As a result, college sports fans should be a primary target audience for brands that focus on higher-income consumers in categories like luxury goods, the automotive industry, and travel.

**Income Bracket Comparison of Known Fans vs US Population**

<table>
<thead>
<tr>
<th>Bracket</th>
<th>US Population</th>
<th>Known Fans</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0-$50K</td>
<td>38%</td>
<td>20%</td>
</tr>
<tr>
<td>$50-$100K</td>
<td>30%</td>
<td>31%</td>
</tr>
<tr>
<td>$100-$150K</td>
<td>16%</td>
<td>21%</td>
</tr>
<tr>
<td>$150-$200K</td>
<td>7%</td>
<td>11%</td>
</tr>
<tr>
<td>$200K+</td>
<td>9%</td>
<td>18%</td>
</tr>
</tbody>
</table>

*Source: US Census 2019, LEARFIELD Fanbase*
A deeper analysis compares the US population of high-income earners with Known Fans, revealing that college sports fans are 1.81x more likely to have incomes over $150K.

**High-Income Comparison**

![Graph showing high-income comparison](image)

**INSIGHT** Known Fans are 81% more likely to have incomes over $150,000 a year.

**College Sports Fan Monthly Disposable Income Comparison**

![Graph showing monthly disposable income comparison](image)

College fans are 59% more likely to have monthly disposable incomes of $7,500 to $10,000 when compared to the US adult population.
Diving deeper into this income analysis reveals more information about the income distribution of Known Fans, as the chart below shows the percentage of Known Fans for different income and age brackets. For example, the bars indicate that among Known Fans between the ages of 25-34, 32% earn between $50K and $100K.

The chart to the left reveals the average and median income for Known Fans compared to the US population for each age bracket.

The analysis shows that for each age group, Known Fan average household income and median household income exceed that of the US population, with peak differences among ages 25-34 and 55-64. This highlights the relative income difference in the 25-34 range. This is critical insight for brands that want to engage in the college sports landscape: at all ages, college sports Known Fans have higher incomes than the US population. Regardless of target age, the college sports fan is an attractive demographic to engage, particularly for products and services that rely on average to high disposable income levels.
College Sports Fans Can Be Reached Across the Country

There are college sports fans in 50 states, all 210 DMAs, and Known Fans in 93% of all US counties. While nearly 40% of college fans live within 30 miles of their favorite school, that does not paint the full picture. 19.9% live between 30-79 miles away. And 41.1% of college fans live more than 80 miles away, with 36% living more than 100 miles from the school for which they have an affinity.

This is another critical insight for brands. For the 53% that live within 50 miles to campus, in-person, local engagement may be the most effective method for both game day and non-game day activations. Alternatively, digital engagement strategies may be more valuable for fans who don’t live close to campus. As previously noted, there are millions of fans that do not live near their favorite school which do engage with their teams and brand sponsors digitally. These are represented in the over 130 million anonymized fans that can be reached through digital strategies.

Whether fans live in the shadow of the stadium or across the country, they take their affinity for their team with them and can be engaged through interest in their school and sport. The chart below leverages ticket buying information, in addition to location data, to understand the nuances and differences between football ticket buyers and men’s basketball ticket buyers. For instance, men’s basketball fans are more likely to live within 50 miles of campus compared to football fans.

This may seem intuitive as men’s basketball games are more likely to be played midweek and occur more frequently, but it is still a valuable factor for brands to understand when engaging with these fans. As brands consider how to engage with specific audiences, they should be strategic on the assets they deploy based on fan location.

Brands with a regional or national offering that want to reach fans of a particular school have to look beyond local marketing assets toward additional elements to reach the entire fanbase.

Deploying IP-branded assets (for instance, licensed school marks) in digital advertising and activation with first-party data targeting can deliver more fan engagement and conversion.

A deeper analysis of the geographic differences addresses the percentage of Known Fans that are in-state vs out-of-state. On average, approximately 70% of Known Fans are in-state. There are wide variations by school, however, with some having a majority of fans out of state. Knowing where fans are located is pivotal to effective brand marketing and other efforts to engage them, which leads to a deeper analysis on fan concentration versus dispersion.
Out-of-state average and median income both exceed in-state average and median incomes by approximately $17K. This in-state and out-of-state comparison is a valuable layer of income analysis for marketers. These fans, some of whom may travel to attend a game or event, should be engaged with a marketing mix that includes digital and social media to supplement in-stadium and game day activations.

In summary, the geographic and location-based analysis reveals that Known Fans are located both near and far from the school they support, with almost a 50/50 split at 50 miles from campus. A significant number of Known Fans reside in large DMAs at an even higher percentage than the US population, and a large portion of these Known Fans support a non-local school. Furthermore, In-state and out-of-state fans have higher incomes compared to the US population, although out-of-state fans earn more than in-state fans by more than 15% on average.
Fan Engagement Is Year-Round

College sports marketing has the reputation of being a seasonal marketing strategy, available only on game days at certain times of the year. Although there are certainly more touchpoints with fans while games are being played and while school is in session, fans don’t stop caring when the season ends. This was evidenced in the analysis of the impressions for official athletics social accounts and official athletics websites.

Based on an analysis of the impressions for official athletics social accounts and websites, there is a growing baseline of engagement throughout the entire year (despite disruptions due to the pandemic).

**Social Impressions from Official Athletic Social Accounts**

During the research period, the onset of COVID-19 in March 2020 led to a small, temporary dip in impressions of Official Athletics Social Account content. However, impression counts increased significantly during the 2020-2021 college basketball season, indicating pent-up demand for college sports coming out of the early phases of the pandemic.

While social media and official athletic website engagement is 23% higher than the average on Saturdays, we see consistent engagement throughout the week. This is significant and confirms that college fans think about and engage with their favorite school every day - not just on game day.
Summary of Key Insights

Based on the detailed analysis reflected in this report, brands and marketers should understand the following key takeaways:

- Known Fans over-index in the 35-to-54 age range, a group which has high disposable incomes
- Known Female Fans are more engaged on social media compared to professional sports, and represent disproportionate spending power
- Known Fans are 1.8x more likely to earn $150K or more compared to the US population
- Known Fans are increasingly mobile, with 41.1% living beyond 80 miles from campus
- Known Fans are engaged on both social and digital media throughout the year, showcasing the enduring power of fandom
- Known Fans are located in all major DMAs and have high engagement percentages in the top 10 DMAs that many brands target

Conclusion

This inaugural LEARFIELD Intercollegiate Fan Report provides a first-ever analysis of the college sports fan, resulting in a number of key observations and insights for brands and marketers. First, the college sports fan population of 182 million makes it the largest among all sports fans, including professional leagues in the US. As a group, across all ages and segments, the college sports fan is affluent with more spending power than the average American.

Split between genders and ages, college sports fans represent coveted blocks of adults with disposable income. Whether in the same town as their school or living across the country, every pocket of the US has college sports fans who want to hear from their schools and brands that support their athletic programs.

For more information on LEARFIELD or how to use this data to inform marketing plans, see www.LEARFIELD.com.
Report Methodology, Definitions, and Sources

The LEARFIELD College Fan Report has leveraged a variety of data sources available to LEARFIELD. The principal data source for analysis is Fanbase, LEARFIELD’s proprietary, first-party data and analytics platform. Fanbase powers strategic fan insights across the enterprise, leveraging best-in-class analytics to unlock the next wave of growth in intercollegiate sports. By aggregating data across ticketing, sponsorship, digital and social channels, commerce, and more, Fanbase helps LEARFIELD and our school partners to better understand how fans engage with college athletics.
LEARFIELD launched Fanbase in May 2020, with the goal of leveraging the power of data to drive the performance of our university partners and our brand sponsors. Just 15 months later, Fanbase has become the largest first-party data and analytics platform in college athletics, helping our partners and teams better articulate the passion and influence of the college sports fan.

To our past, present, and future college and university partners: **Thank you for trusting LEARFIELD to help support your goals and objectives.** It is our privilege to help connect brands with your fans.

The report analyzed data available in the Fanbase platform as of June 21, 2021, leveraging data from approximately 70 LEARFIELD Fanbase partner schools. Fanbase’s first-party records are called Known Fans, which are individual consumer records associated with a particular partner school based on direct fan engagement. That data is then appended with commercially available first-party data, which provides the opportunity for analysis on age, income, gender, etc.

Our inaugural report analyzed 20,049,350 Known Fans, with a subset of those fans being identified as Football Buyers or Men’s Basketball Buyers based on ticket purchase transactions from both primary and secondary ticketing systems.

We derived Fanbase Known Fan average income using household income brackets $0-$50K, $50K-$100K, etc. From these ranges, we assumed the average income to be the midpoint, such as $75K for a household in the $50K-$100K bracket. For the top income bracket of $250K and over, we used $250K as a conservative estimate. We then calculated the average based on the number of fans that were in each band. We derived Fanbase Known Fan median income assuming a normal distribution index based on the total population in each income band. For instance, we assume one Known Fan earns the lowest income in a range (for example, $50K), and the last Known Fan in that range earns the top ($100K). Each fan between the top and bottom makes incrementally more to fill the range, per a normal distribution.
In addition to Fanbase data, this report also leverages additional research from independent market research partners cited throughout the report. Many of these data sources are composed of syndicated data, which consists of a statistically significant sample size that is then extrapolated to represent a larger audience. We also leveraged data from the US Census Bureau, specifically to gather information on the average/median US population to compare against Fanbase data. In particular:

1) Age data: https://data.census.gov/cedsci/, AGE AND SEX, Survey/Program: American Community Survey, TableID: S0101


We also referenced and analyzed syndicated research and other sources including the following:
- BLS; “CONSUMER EXPENDITURES—2019”; https://www.bls.gov/news.release/cesan.nr0.htm
- Collegiate Licensing Company (CLC), 2019 Annual Report
- Fan365, LEARFIELD’s digital sponsorship offering
- Nielsen Scarborough Research 2020
- Nielsen TV, 2020-21 Report
- SSRS/Luker on Trends; College Sports Fans, 12+; Fall 2020 Report
- YouGov Profiles+, 6.13.2021