



PLAYFLY

FANSCORE

POWERED BY  VISION INSIGHTS



COLLEGE FOOTBALL
EDITION

2023

MEET PLAYFLY INSIGHTS

Playfly Insights is a leading provider of thought leadership, fan data, and insights in the sports, technology and media industries. We utilize a consultative data-driven approach to reach, engage, monetize, and measure fandom to give our partners a competitive advantage. We compile and produce full-scope analytics and studies, as brands and partners alike seek to share their stories. Both inside and outside the sports industry, clients look to Playfly to understand what makes fans tick. From consumer buying habits to value and motivators, **we know fandom.**

Decision-makers in clubhouses, boardrooms, and newsrooms leverage our data insights to uncover fan trends, preferences, and behaviors. Our data and analysis help them better understand the sports fandom landscape and deliver on business objectives. Increase brand awareness, maximize ROAS, activate new audiences, and more with custom research and studies from Playfly Insights.

Reach out to Playfly Insights today at playflyinsights@playfly.com to get your own custom study.

FANDOM AS A SERVICE



WE BELIEVE

...THAT FANS ARE AT THE CENTER OF EVERYTHING WE DO

AND THAT THE ONLY WAY TO UNDERSTAND THE CONSTANT EVOLUTION IS THROUGH DATA EXPERTISE

MOST COMMONLY REQUESTED STUDIES

Want to learn more about your fans with actionable data? Reach out to Playfly Insights today!

CUSTOM RESEARCH STUDIES

- Fan Satisfaction Study
- Pricing Analysis (e.g., Yield Management, Venue Rescaling, New Inventory)
- Donor, Premium, and Season Ticket Analysis
- TV Visible Signage Assessment
- Recruiting & Retention Study
- Custom Forever Fan Study

FAN SEGMENTATION STUDY

Playfly Insights will help you identify your specific and custom fan segments based on fan behavior and preferences, allowing you to target and activate these segments differently (e.g., ticketing, donations, marketing).

ALWAYS-ON™ FAN INSIGHTS

Take a deeper dive into fan profiles with your own annual license to Vision Insights' Decoder media valuation product, plus get actionable data analysis and reporting from Playfly Insights.



TABLE OF CONTENTS

- 01** COLLEGE FOOTBALL OVERVIEW
- 02** INTRODUCING THE COLLEGE FOOTBALL FOREVER FAN
- 03** COLLEGE FOOTBALL SPONSOR RECEPTIVITY ANALYSIS
- 04** CONFERENCE REALIGNMENT STUDIES
- 05** COLLEGE GAMEDAY FAN STUDIES
- 06** RECRUITING AND RETENTION ANALYSIS
- 07** PLAYFLY FANSCORE: COLLEGE FOOTBALL

1. COLLEGE FOOTBALL OVERVIEW

When it comes to college sports in America, football reigns supreme. NCAA college football has a dedicated, widespread following and remains one of the biggest sports in the country based on attendance, viewership, fandom, and cultural relevance. This popularity spans small towns and major media markets, creating local fandom at a national and international level.

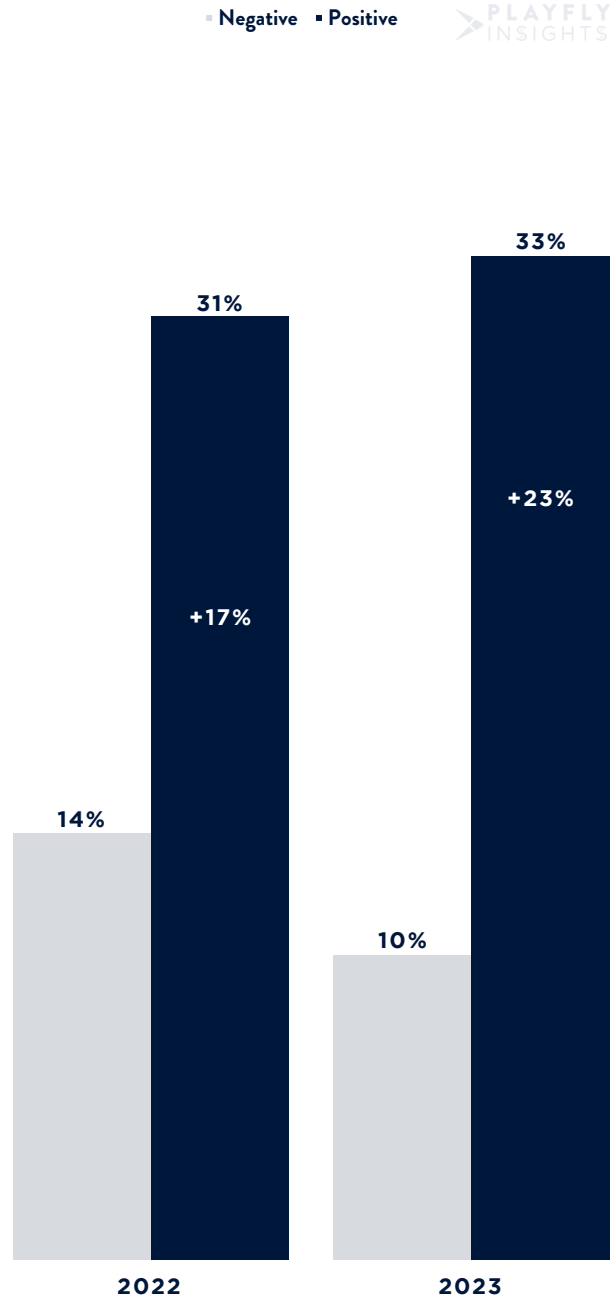
FAN SENTIMENT ON THE DIRECTION OF COLLEGE FOOTBALL

There is no denying that college football is in the midst of a historic transition. Student-athletes won the right to monetize their name, image and likeness (NIL), and new transfer portal rules offer the flexibility to transfer to a new school and play immediately. Combining these rule changes with unprecedented conference realignment makes this transformation more significant than any other that a sports league has ever experienced.

So, how do fans feel about the overall direction of the sport?

Very positive, and growing.

FAN SENTIMENT ON THE DIRECTION OF COLLEGE FOOTBALL



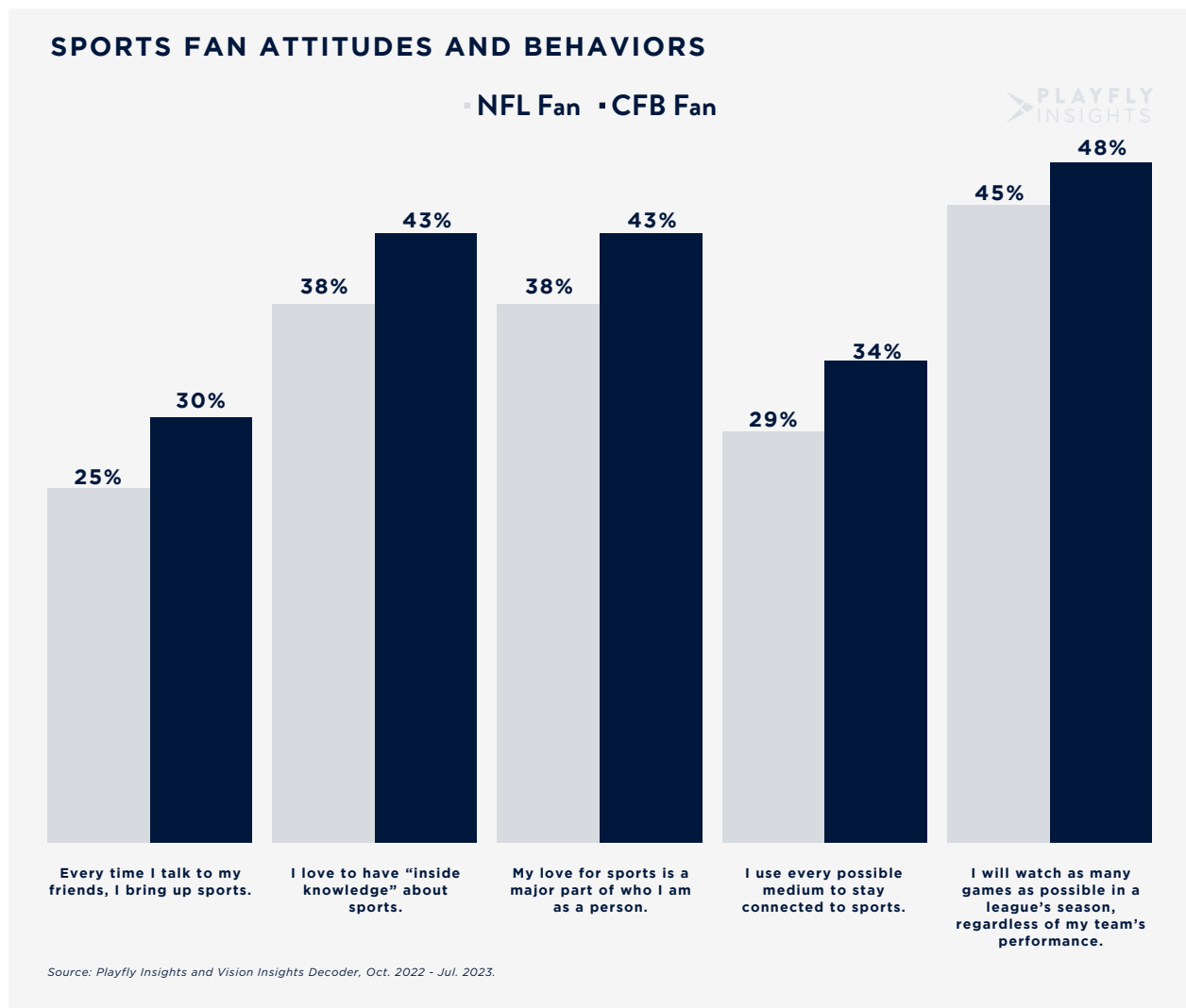
Source: Playfly Insights and Vision Insights Custom Study, Aug. 2022 and Sept. 2023.

COLLEGE FOOTBALL FANS - THE BEST IN SPORTS

No fans are more passionate, connected, or opinionated than college football fans. Their hearts beat with their team, following winners and losers through thick and thin every season. From big Power 5 brands with national followings to small schools in Appalachia that are at the center of their communities, these fans feel deeply rooted to their school through generations of

rivalries, tailgates, and traditions. Across college football, these fans closely track recruits, devour content, and endlessly debate anything related to their favorite program. Their lifelong dedication and incredible engagement set them apart as the best fanbase in sports.

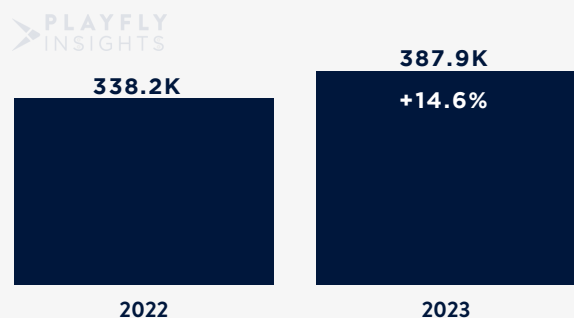
We identified the fan characteristics that set college football fans apart.



COLLEGE FOOTBALL TV VIEWERSHIP IS GROWING

The 2023-24 college football season is off to an exciting start, with viewership up nearly 15% over the first seven weeks compared to the same period last year. Several factors contribute to this increase, including big-brand matchups, star power, and the transfer portal creating parity and year-round media attention to the sport.

NATIONAL TV TOTALS THRU WEEK 7 P2+ VIEWERSHIP



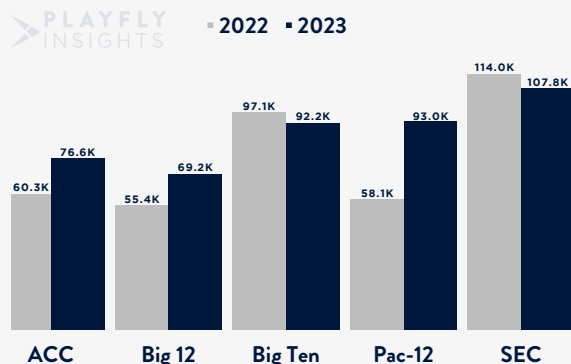
Source: Nielsen NTI, Live+SD; Weeks 0 thru 7 of 2022, 2023 seasons

Marquee matchups are always bound to generate high viewership numbers due to large team followings and collective interest of fans around the country. This season is no different, as Notre Dame vs. Ohio State became NBC's most-watched college football game in 30 years, averaging 10.5M across all channels.

The ACC (+27%) and Big 12 (+25%) Conferences are reaping the benefits of their premier teams having

successful on-field performance, with games featuring Florida State up 51% and Texas up 14%.

CONFERENCE TV TOTALS THRU WEEK 7 P2+ (000) VIEWERSHIP



Source: Nielsen NTI, Live+SD; Weeks 0 thru 7 of 2022, 2023 seasons

Meanwhile, the Pac-12's resurgence (+60%) is led by several transfer quarterbacks that are Heisman contenders and are prominently featured in national NIL campaigns. But one dominant reason for increased Pac-12 viewership is Deion Sanders and the Colorado Buffaloes.

Beyond the celebrity, fans and college administrators were drawn to see what Coach Prime's transformed Colorado roster of 86 new players, including 51 from the transfer portal, was capable of in this new of era of the sport.

As we will see later in the report, big-game matchups are something college football fans look forward to with future realignment. Combined

with the star power of top players, the transfer portal, and increased year-round media attention – one can expect viewership to continue its rise.

Custom property and conference reports are available - contact playflyinsights@playfly.com.

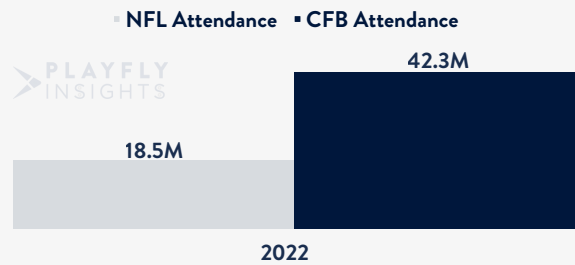
COLLEGE FOOTBALL - MORE THAN 2X NFL ANNUAL ATTENDANCE

Last season saw the highest overall college football attendance across FBS, FCS, and DII since 2016, and a 5% increase from 2021. With more

games and larger venues, college football easily draws more fans than the NFL.

For perspective, 42.3 million fans turned out for the 2022 regular season – more than double the annual attendance of the NFL (18.5 million).

HOME ATTENDANCE TOTALS (BY REGULAR SEASON)



Source: Official NCAA Statistics, Statista



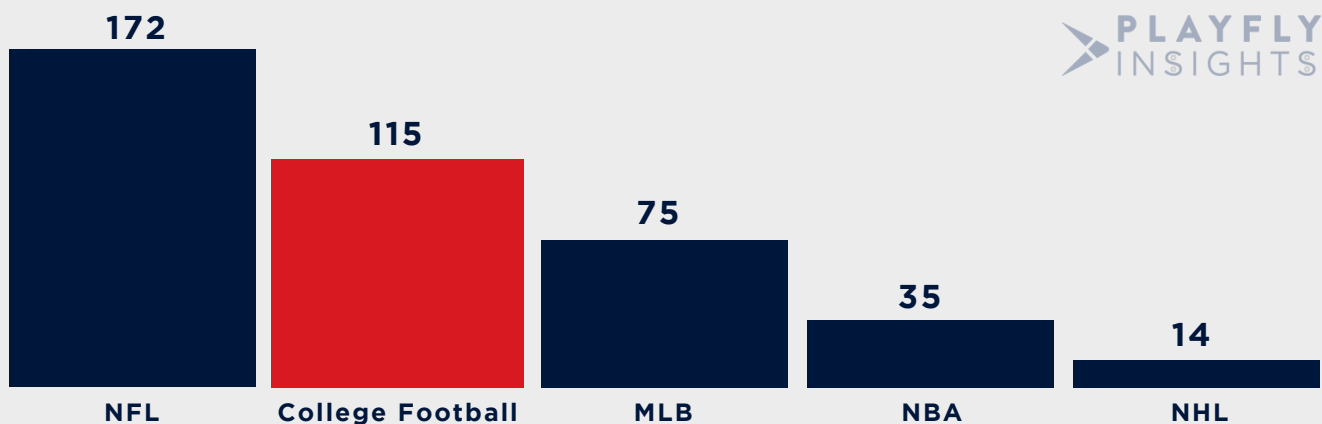
A LIGHT ON COLLEGE FOOTBALL REGULAR SEASON DOMINANCE

To normalize college football against professional sports with varying season lengths, we calculated total sport Nielsen viewership on an average weekly basis (regular season only). Through this lens, the strength and popularity of college football crystallizes.



College football has a significantly larger weekly TV audience than MLB (+53%) and more than 2x NBA and NHL weekly viewership combined.

TV AUDIENCE: PERSONS 2+ AVERAGE WEEKLY GROSS RATING POINTS



Source: Nielsen, Live + SD, Persons 2+ Gross Rating Points, 10/01/21 - 09/11/23

16 TV NETWORKS AIRING COLLEGE FOOTBALL IN 2023



*Network not measured and not included in Nielsen viewership Gross Rating Points.



Reach out to Playfly Insights at playflyinsights@playfly.com to go beyond your rating to understand your true fan reach and engagement!



2. INTRODUCING THE COLLEGE FOOTBALL FOREVER FAN

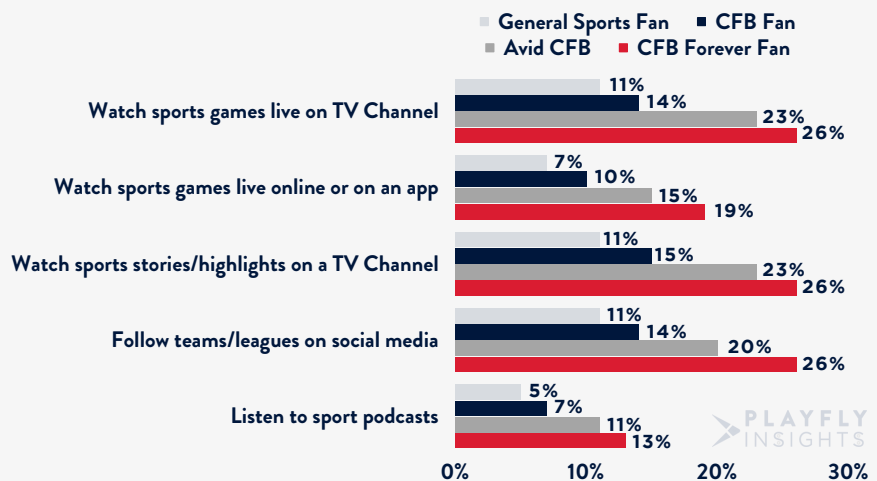
At Playfly Insights, we developed a proprietary tool, in partnership with Vision Insights, that uncovers a new way of looking at the most avid college football fan.

We identified a segment called the “Forever Fan.”

The Forever Fan’s lifelong allegiance to their team and the significant role sports contribute to their identity make them essential fans for both marketers and athletic directors to reach, nurture, and activate.

Unlike traditional definitions of avid fandom, Forever Fans immerse themselves in college sports daily, not just on game day. They follow news, scores, and storylines across multiple platforms with genuine passion. These fans feel a deeper personal connection to their teams, forging identities and community around their allegiance. They bleed team colors, pass their fandom to the next generation, and are vocal advocates for the sport to friends and strangers alike.

FOREVER FAN SPORTS MEDIA CONSUMPTION (DAILY)



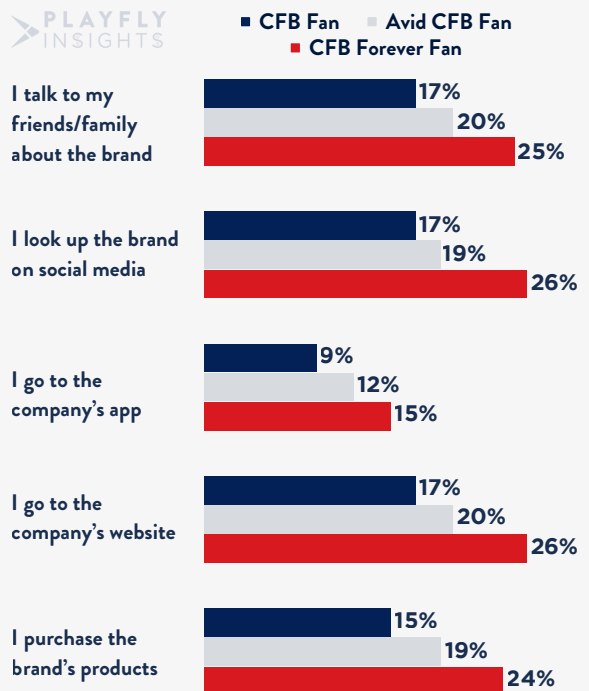
Source: Playfly Insights and Vision Insights Decoder, Oct. 2022 - Jul. 2023



Forever Fans don't just consume team-based content, they welcome relevant brand activations as value-adds that enhance their viewing experience. They readily act after seeing a brand's sponsorship with a league, team, or individual, whether on TV, online, over social media, or other channels.

Significantly more Forever Fans talk to friends and family about the sponsor brand, look the brand up on social media, and go to the company's website. Forever Fans represent the most devoted and engaged fanbase and serve as effective brand ambassadors for both the team and sponsor brands.

FOREVER FAN POSITIVE SPONSORSHIP REACTIONS



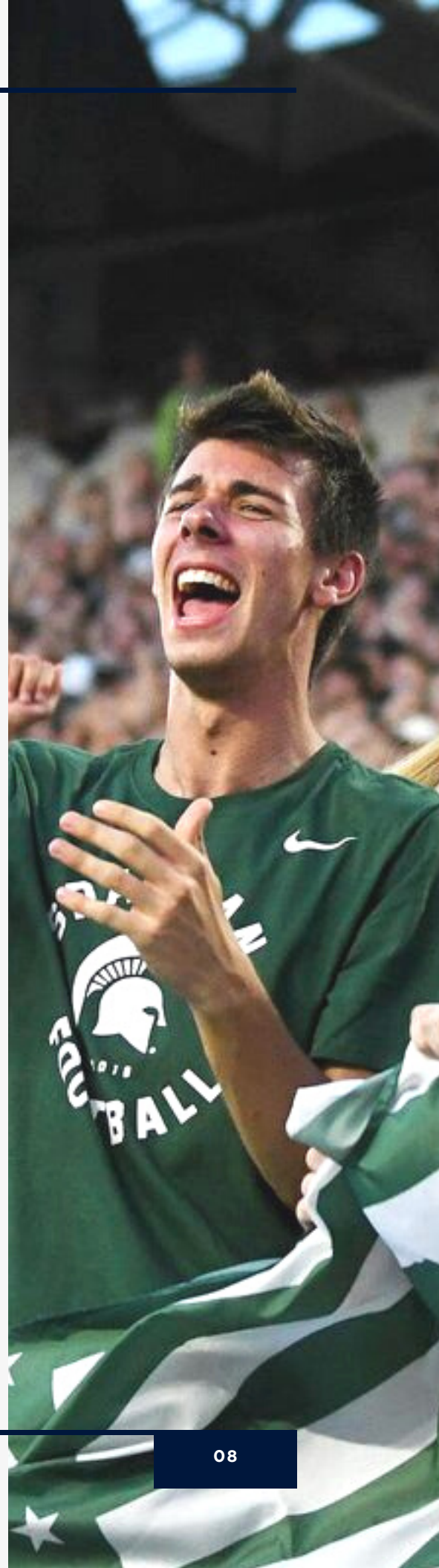
Source: Playfly Insights and Vision Insights Decoder, Oct. 2022 - Jul. 2023

FOREVER FAN CONCENTRATION BY GEOGRAPHY

College football fandom runs deep in communities across America. More than pro sports, college football loyalty is uniquely tied to geography; both where fans live now and where they came from. In our survey, 32% of fans said their region of current residence drove their team choice. Another 25% point to previous residence. By sheer fan count, the South leads the way, with 40% of college football fans residing below the Mason-Dixon line and 22% living in the Midwest.

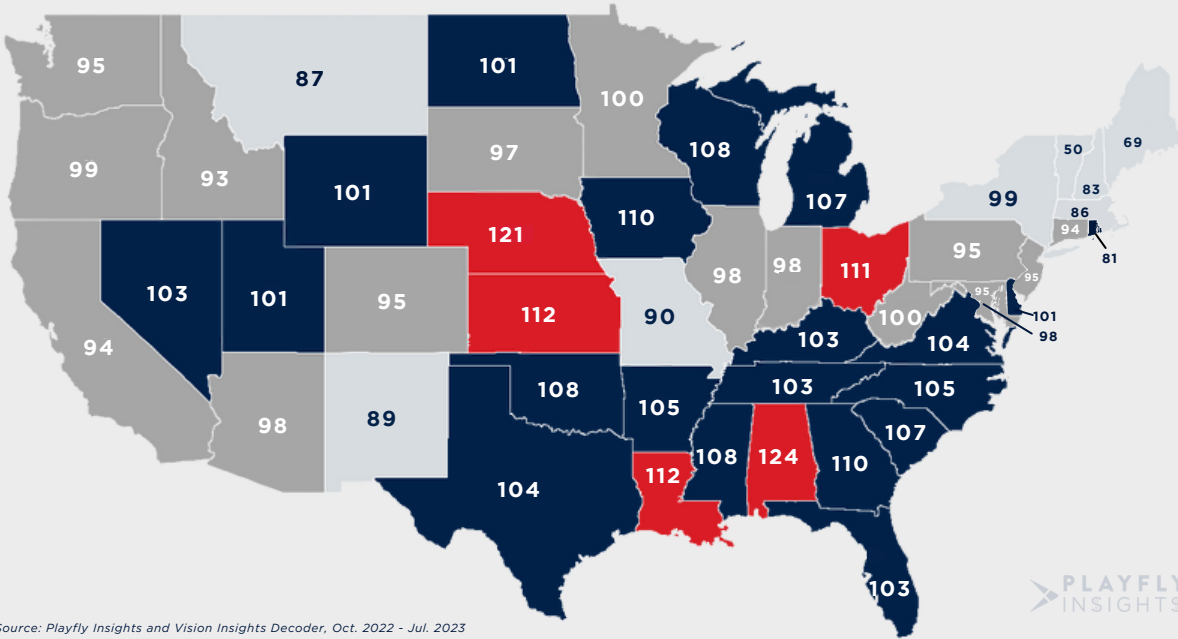
However, the size of the fanbase does not necessarily equate to greater fandom and engagement. States with fewer total college football fans often exhibit a higher concentration of Forever Fans.

Florida, Pennsylvania, and Washington stand out for their high concentration of Forever Fans, compared to total college football fans. In states like these, you may not find as many college football fans as in the South, but the value behind the fan bases is unmatched.

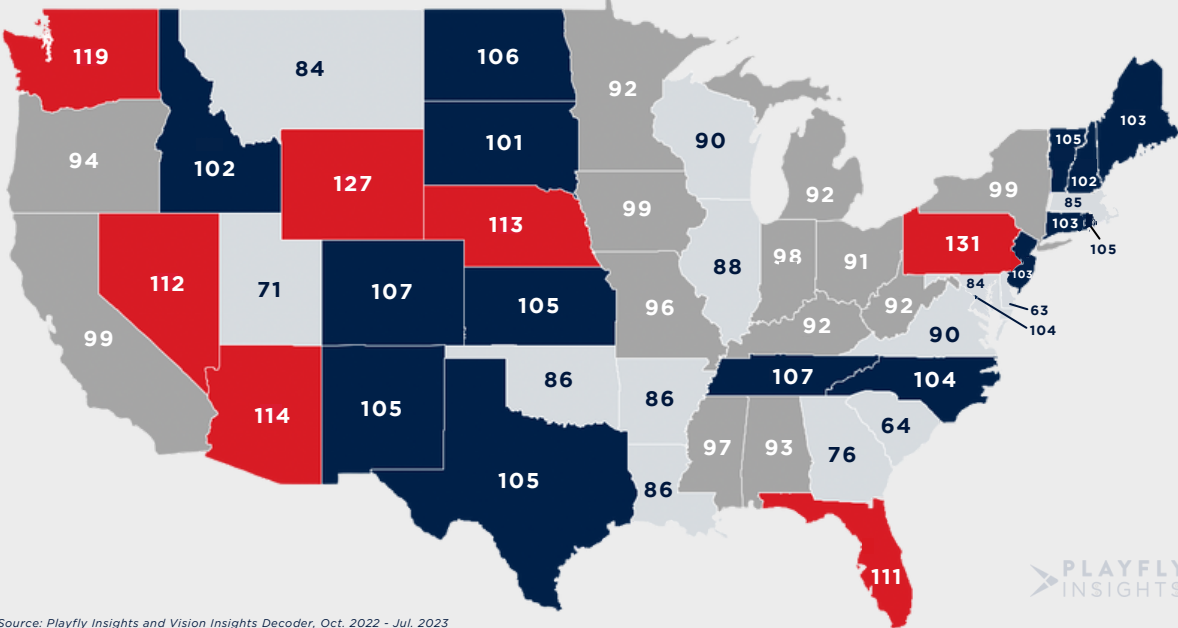


Savvy marketers need to balance fan base size and fan engagement when looking to maximize their investment in college football.

INDEX OF COLLEGE FOOTBALL FANS TO THE GENERAL POPULATION



INDEX OF FOREVER FANS TO COLLEGE FOOTBALL FANS

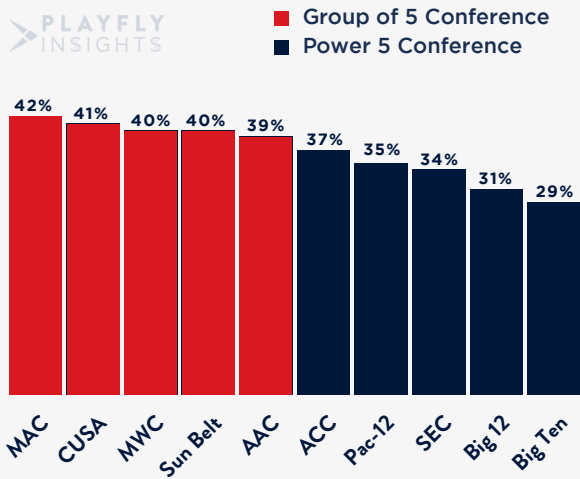


FOREVER FAN CONCENTRATION BY CONFERENCE

You might expect Power 5 conferences like the Big Ten and the SEC to draw a greater concentration of Forever Fans. These conferences are home to big brands with perennial National Championship contenders.

But, the distribution of Forever Fans by conference bucks expectations. Group of 5 conferences out rank all Power 5 conferences in Forever Fan concentration.

PERCENT OF COLLEGE FOOTBALL FOREVER FANS BY CONFERENCE



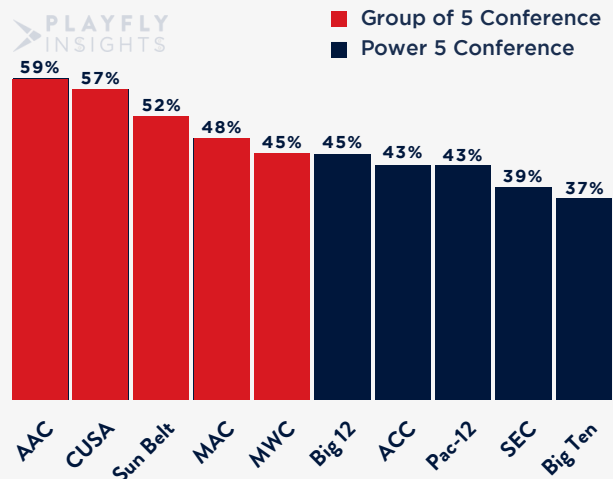
Source: Playfly Insights and Vision Insights Decoder, Oct. 2022 - Jul. 2023

What's more, every Group of 5 conference outperforms the Power 5 in sponsorship receptivity, especially compared to the SEC and Big Ten.

Why?

Fans of Group of 5 colleges and universities have fervent passion for their team because they have a direct relationship with the school. These fans grew up near the school or became fans because of their parents, often attending games growing up. They are indoctrinated into the traditions and rivalries early and become die hard fans.

INCREASED CONSIDERATION DUE TO A BRAND SPONSORING SPORTS BY CONFERENCE



Source: Playfly Insights and Vision Insights Decoder, Oct. 2022 - Jul. 2023





3. COLLEGE FOOTBALL SPONSOR RECEPTIVITY ANALYSIS

Strategic partnerships between brands and college football teams can win over the most diehard, tradition-loving fans. College football fans, general, and Forever Fans are open and responsive to brand sponsorships associated with their favorite teams. College football Forever Fans show a significantly stronger affinity for sponsor brands compared to fans of any major league.

KNOWING THAT A COMPANY/BRAND IS ASSOCIATED WITH THE FOLLOWING EVENT TYPES [SPORTS TEAMS/LEAGUES] THROUGH SPONSORSHIP, HOW DOES THAT MAKE YOU FEEL TOWARDS THAT COMPANY/BRAND?

	CFB Forever Fan	CFB Fan	NFL Fan	MLB Fan	NBA Fan	NHL Fan
More Positive	61%	44%	40%	40%	43%	43%
Indifferent	33%	50%	54%	53%	50%	50%

Source: Playfly Insights and Vision Insights Decoder, Oct. 2022 - Jul. 2023



DO YOU EXPERIENCE ANY OF THE FOLLOWING EMOTIONS WHEN SEEING A SPONSOR AFFILIATED WITH A SPORT AND/OR ENTERTAINMENT EVENT THAT YOU FOLLOW?

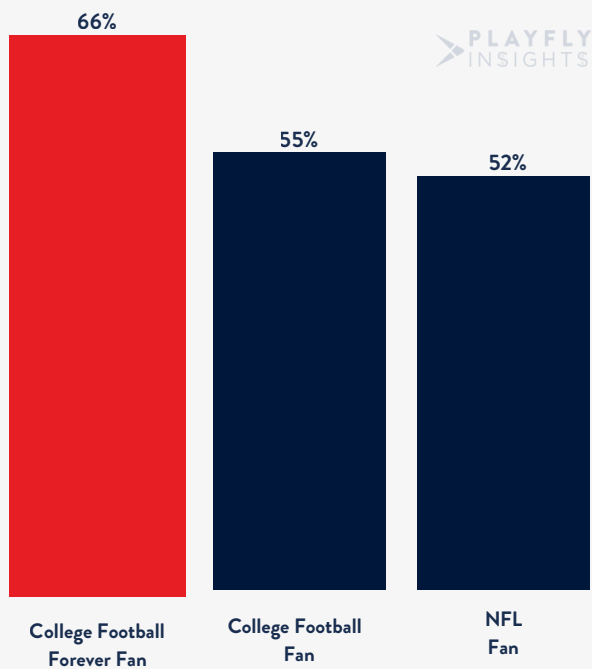
	CFB Forever Fan	CFB Fan	NFL Fan	MLB Fan	NBA Fan	NHL Fan
Excitement	37%	26%	25%	25%	27%	26%
Joy	30%	20%	19%	19%	21%	20%
Confidence	30%	19%	17%	18%	19%	19%
Trust	30%	19%	17%	17%	19%	19%
Goodwill	24%	17%	15%	16%	17%	17%
Surprise	21%	15%	14%	15%	16%	16%

Source: Playfly Insights and Vision Insights Decoder, Oct. 2022 - Jul. 2023



Whether going to the sponsor brand's website or purchasing the brand's products, college football fans are more likely than NFL fans to take action after seeing a brand's sponsorship with a team or league.

PERCENT OF FANS THAT TAKE ANY KIND OF ACTION AFTER SEEING A BRAND'S SPONSORSHIP WITH A LEAGUE, TEAM, OR INDIVIDUAL, WHETHER ON TV, ONLINE, THROUGH SOCIAL MEDIA OR OTHER CHANNELS

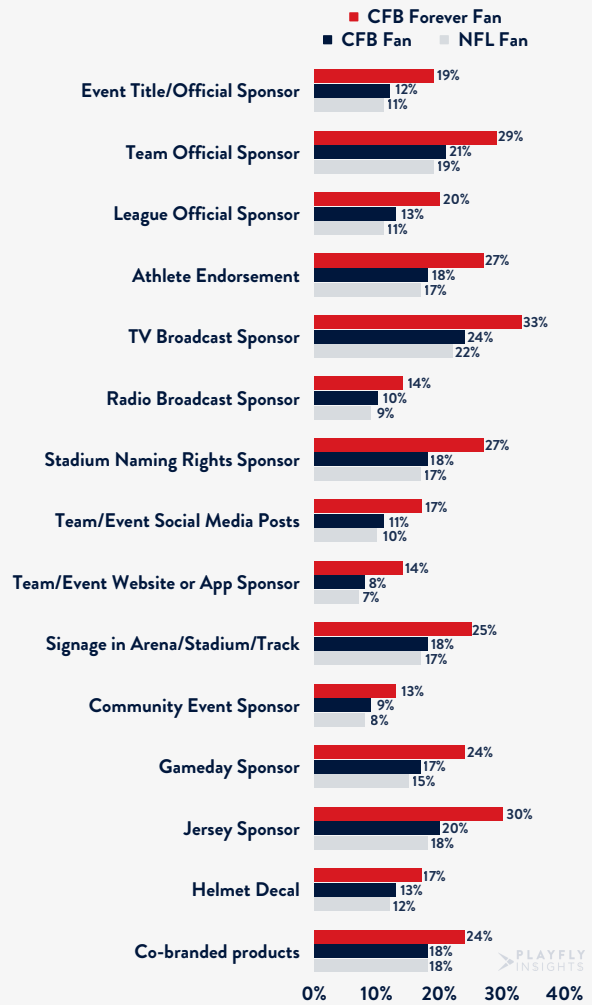


Source: Playfly Insights and Vision Insights Decoder, Oct. 2022 - Jul. 2023

College football Forever Fans are also the most receptive to various sponsorship assets. Predictably, they exhibit the highest level of engagement and attentiveness for every sponsorship asset measured.

Custom property and conference reports are available - contact playflyinsights@playfly.com.

WHAT TYPES OF SPONSORSHIPS ARE THE MOST MEMORABLE AND TEND TO RESONATE WITH YOU AS A FAN?



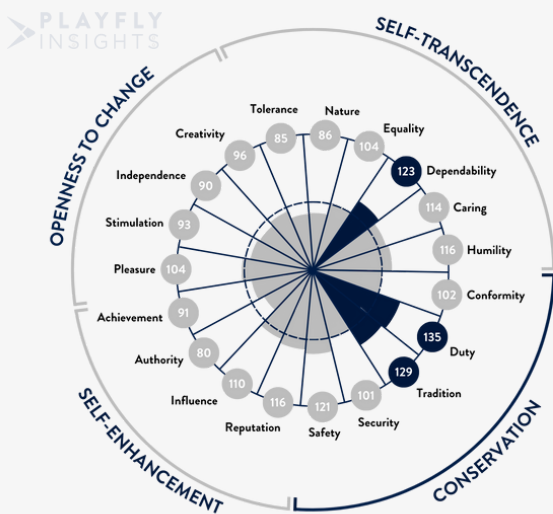
Source: Playfly Insights and Vision Insights Decoder, Oct. 2022 - Jul. 2023



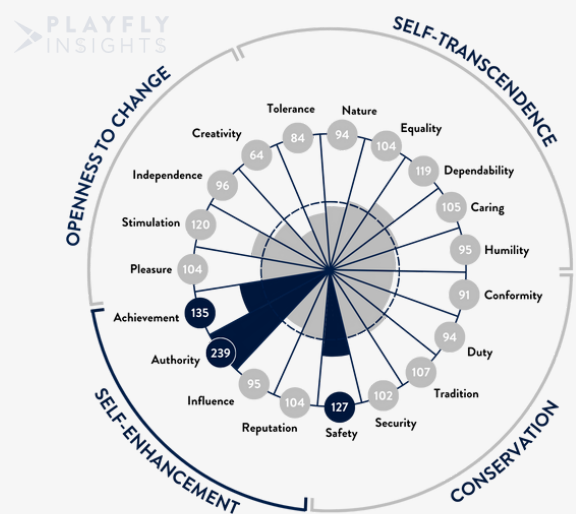
UNLOCKING FAN VALUES AND MOTIVATIONS ENABLES A DEEPER CONNECTION WITH THE FANBASE

With a more balanced distribution of fans across the country, it's particularly important to pay attention to the diversity of fan values in order to tailor marketing strategies to increase impact.

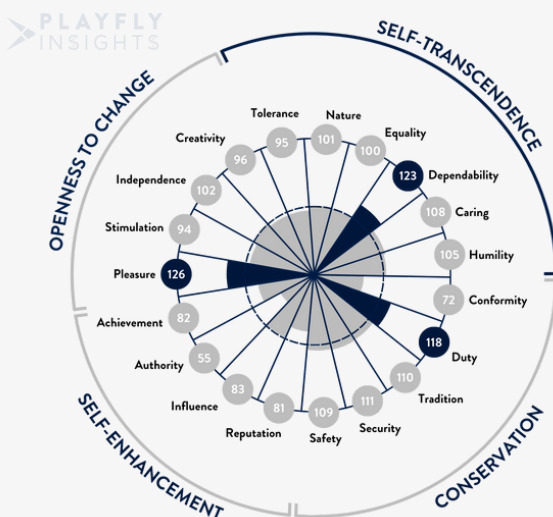
SOUTH CFB FAN



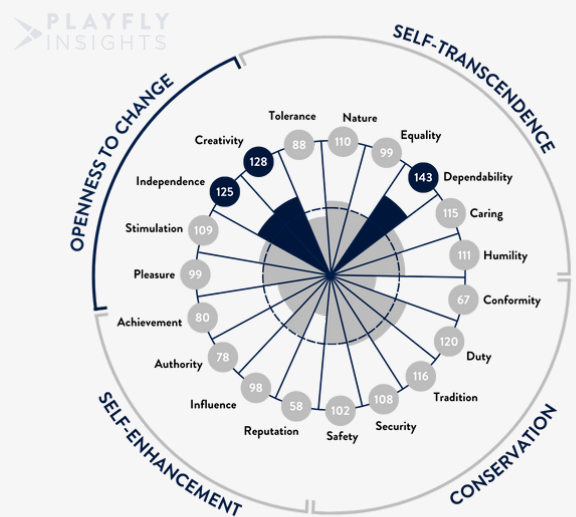
NORTHEAST CFB FAN



MIDWEST CFB FAN



WEST CFB FAN



Source: Resonate



Understand your fans like never before. Connect with the Playfly Insights team at playflyinsights@playfly.com to leverage our data and connect with fans in more meaningful ways.



4. CONFERENCE REALIGNMENT STUDIES

CONFERENCE REALIGNMENT

Conference realignment is woven into the fabric of college sports. For over 120 years, conferences have been swelling and shrinking as rules disputes, revenue sharing, and TV deals drove universities to switch allegiances. The latest round is arguably the biggest conference shakeup since 1990 when South Carolina and Arkansas joined the SEC, Penn State joined the Big Ten, Florida State joined the ACC, and the Big East dove into football by inviting Miami to the conference.

That's not to say the latest shift to 'Super Conferences' came out of nowhere. Over a decade ago, the Big Ten Network set the stage for how media deals could shift the balance of conference power. Nebraska joined the Big Ten to bring big brand power into the ranks, while Maryland and Rutgers joined shortly after to expand the Big Ten's geographic footprint to the East Coast to tap into larger media markets.

Fast forward to 2023. With the expiration of numerous media deals, the migrations of dozens of schools should be no surprise. And, it's easy to say increased revenue is the main driver behind the latest round of conference realignment. But, fan sentiment can influence college decision makers on major issues that impact traditions, rivalries, and the competitiveness that fans value.

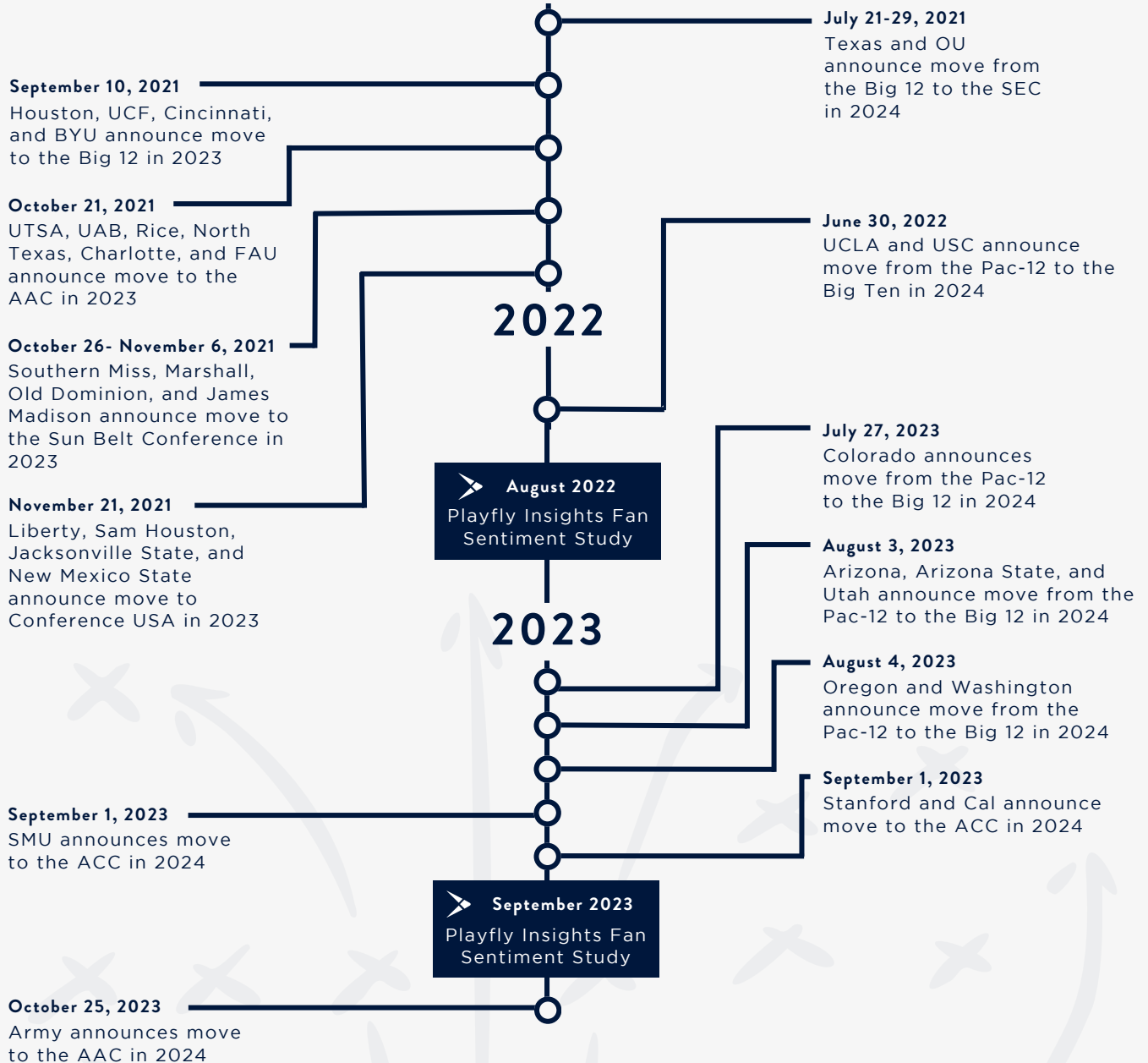
Where does fan sentiment lie on conference realignment? Playfly Insights has the answer.

CONFERENCE REALIGNMENT TIMELINE

GROUP OF 5

2021

POWER 5



2024 SEASON ADDITIONS



Stanford
Cal
SMU



Texas
Oklahoma



UCLA
USC
Oregon
Washington



Colorado
Arizona
Arizona State
Utah



Liberty
Jacksonville State
Sam Houston
New Mexico State



Marshall
Old Dominion
James Madison
Southern Miss



UTSA
UAB
North Texas
Charlotte
FAU
Army

CONFERENCE REALIGNMENT SENTIMENT

At Playfly Insights, we have our finger on the pulse of fan sentiment. In **August 2022**, we conducted a one-of-a-kind, custom fan sentiment study with Vision Insights to gauge opinions following significant realignment announcements in both the Power 5 and Group of 5. Respondents were very positive about the upcoming changes, feeling the conference shifts will have a positive impact on the game.

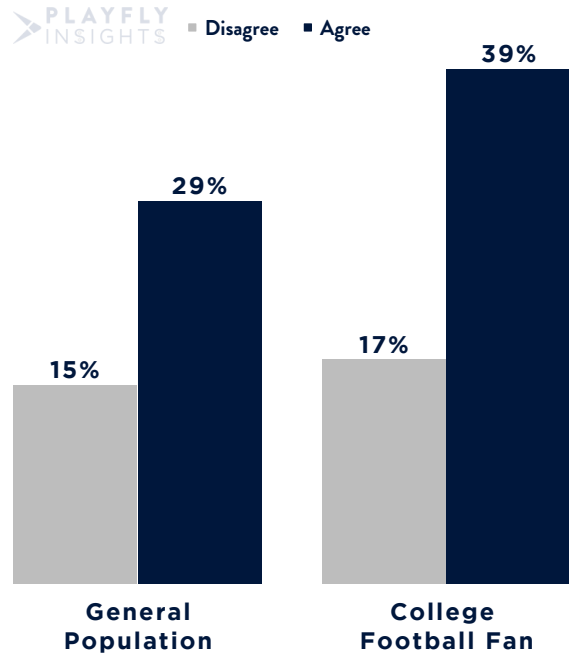
A year later, with considerable moves throughout the Power 5, we were curious to see if sentiment changed.

The results from our **September 2023** study show that net positive fan sentiment among the general population and college football fans remains unchanged.



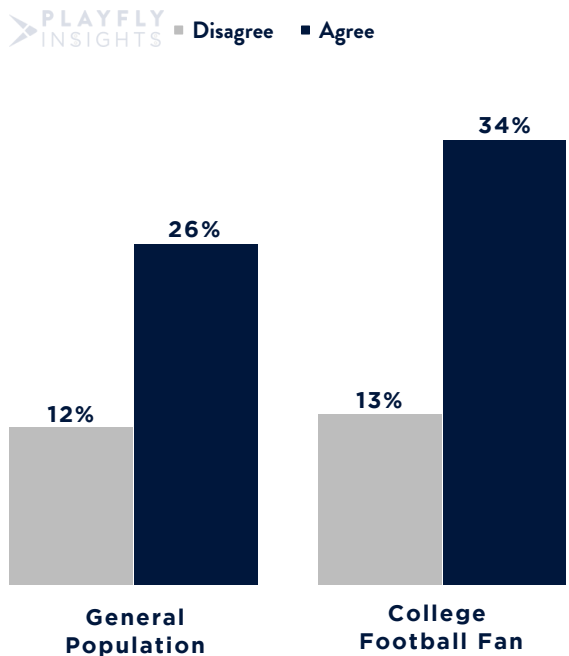
RESPONSE TO “THIS IS A POSITIVE MOVE FOR THE FUTURE OF COLLEGE ATHLETICS” BY FANDOM

2022

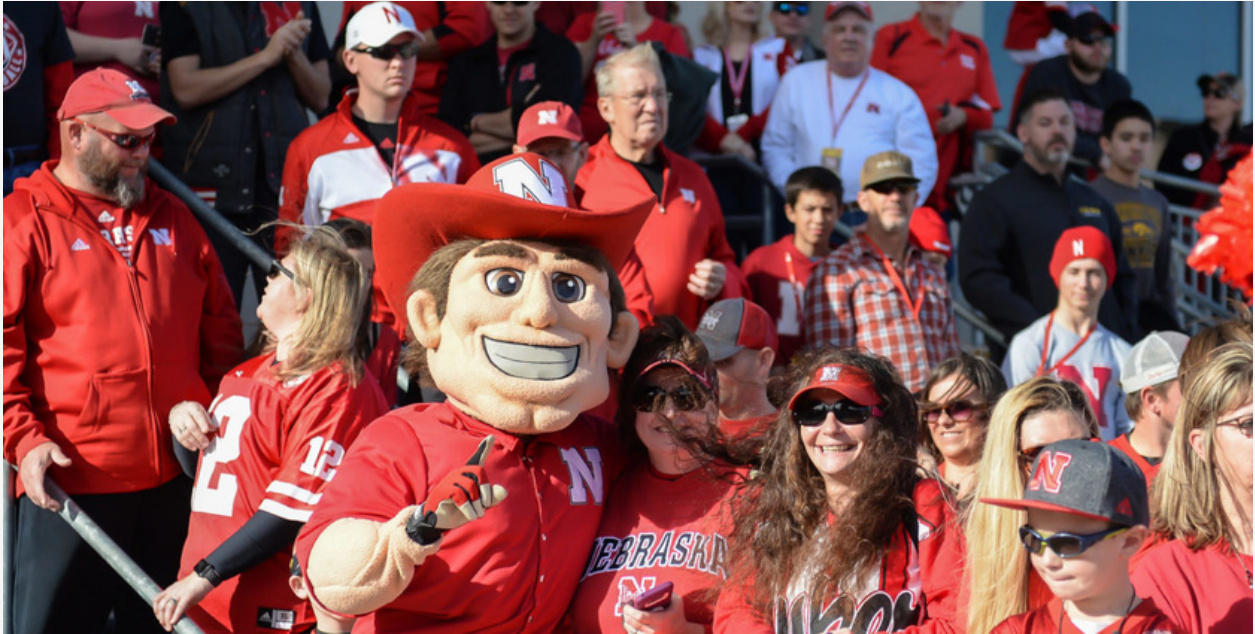


Source: Vision Insights Custom Study, Aug. 2022

2023



Source: Vision Insights Custom Study, Sept. 2023

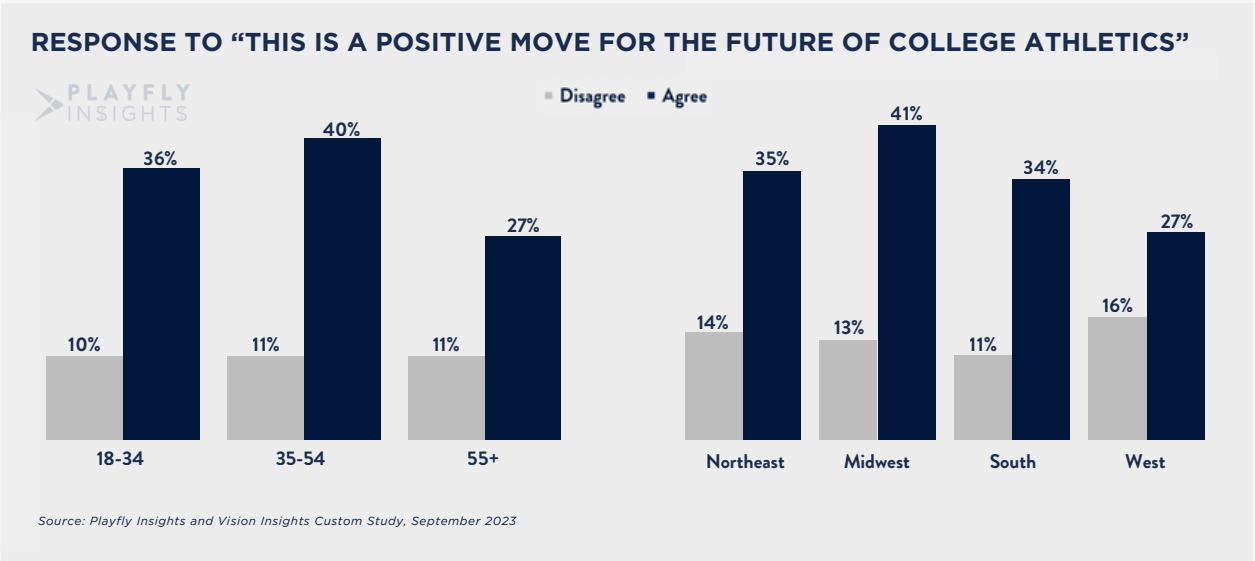


But there is a generational divide in these opinions. 36% of respondents aged 18-34 and 40% of respondents aged 35-54 believe realignment is a positive move for college athletics, while only 27% of respondents aged 55+ agreed with the direction.

Broken down regionally, the Midwest

and South are much more positive, likely driven by the way realignment benefits the SEC (South) and Big Ten (Midwest).

Across ages and the nation, fans are positive, and while youth drive the trend, older fans are surprisingly in favor of realignment.



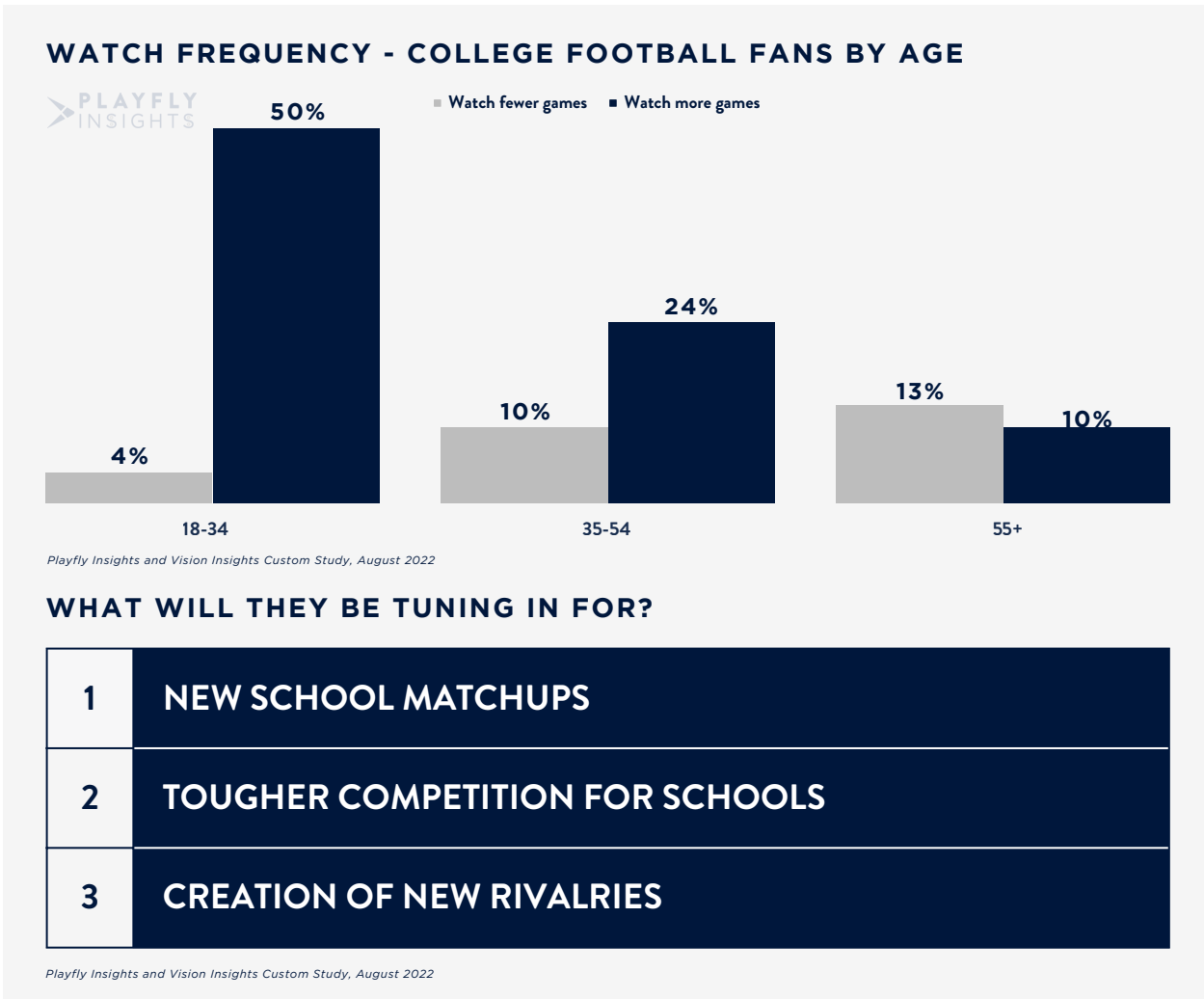
Will realignment lead to increased ratings? Absolutely, yes, and we're already seeing it play out.

The prized 18-34-year-old demographic overwhelmingly agree they will watch more games after realignment. The slight decrease with 55+ fans is more than made up for by the younger demographic. These young fans want new, better matchups and tougher competition. Their positive sentiment for these

changes bodes well for the long-term future of the sport.

Our previous measurement of fan sentiment has proven prophetic, aligning with meaningful shifts in real-time fan behavior.

Just look at 2023's early viewership. The 15% increase we've seen through the first seven weeks is a likely precursor to increasing viewership as conferences expand again in 2024.



COLLEGE FOOTBALL 2022 TV VISIBLE SIGNAGE STUDY

In 2022, Playfly Insights partnered with Vision Insights for a “never been done before” comprehensive fair-market valuation of college football TV visible assets for our partner properties and their sponsors.

STUDY OVERVIEW

57 games
220 brands
23,859 brand exposures
67,685 seconds of brand exposure (1,145 min.)
\$126.6M in 100% media value (based on :30)

INSIGHTS

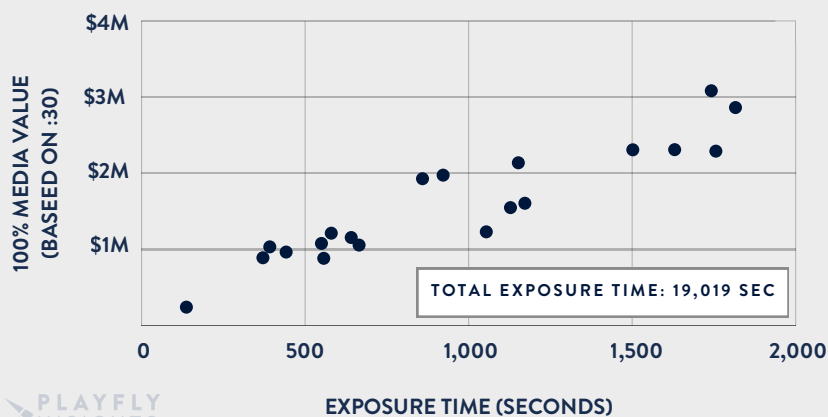
Every property/stadium in College Football is unique.

For example, Playfly Property (A)'s top 20 CFB sponsors received 2.5x more TV exposure time than at Playfly Property (B).

OPPORTUNITY

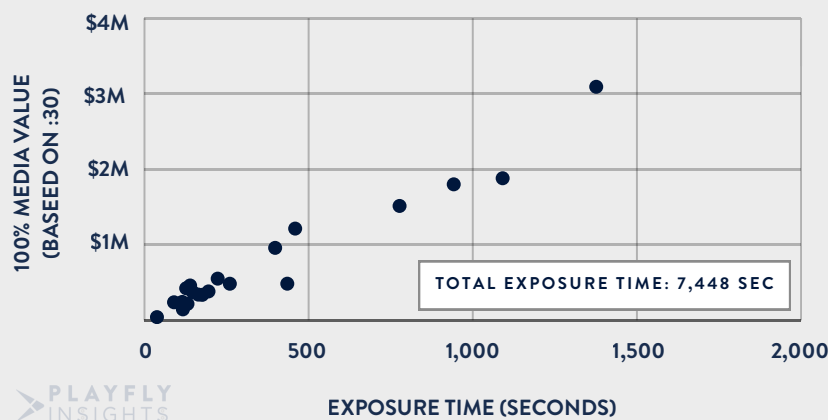
Data used to maximize sponsor value by Playfly properties through better placement and white space analysis.

PLAYFLY PROPERTY (A): TOP 20 SPONSOR CFB GROSS VALUE



● = sponsor

PLAYFLY PROPERTY (B): TOP 20 SPONSOR CFB GROSS VALUE



Interested in more data about brand exposure and impact? Connect with our Playfly Insights team at playflyinsights@playfly.com.



5. COLLEGE GAMEDAY FAN STUDIES

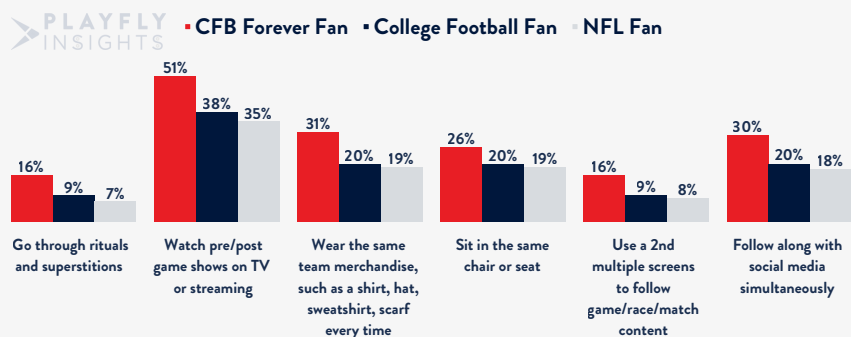
Time-tested rivalries and sometimes whacky traditions set college football apart from its professional counterpart. Epic rivalry games like Alabama vs. Auburn, Army vs. Navy, and Oklahoma vs. Texas trace their origins back 100 years. The bad blood runs deep. For fans, defeating a hated rival brings unmatched joy.

These rivalries and traditions tap into regional, cultural, and institutional identities, fueling college football’s passionate following.

That energy and passion is palpable on game day, uniting fans throughout the season. For college football fans, few other sensations match hearing the band start playing and watching their team run onto the field.

The game day experience in college football is unlike anything else. Whether at home or at the stadium, college football fans are more likely to buy into superstitions, don their favorite jersey, and tune in to the game across mediums.

ON THE DAY OF A GAME/RACE/MATCH, WHETHER IN-PERSON AT THE EVENT, AT HOME, OR AT A WATCH PARTY, DO YOU...?



Source: Playfly Insights and Vision Insights Decoder, Oct. 2022 - Jul. 2023

FAN SATISFACTION CASE STUDY: MEASURING GAME DAY PERCEPTIONS

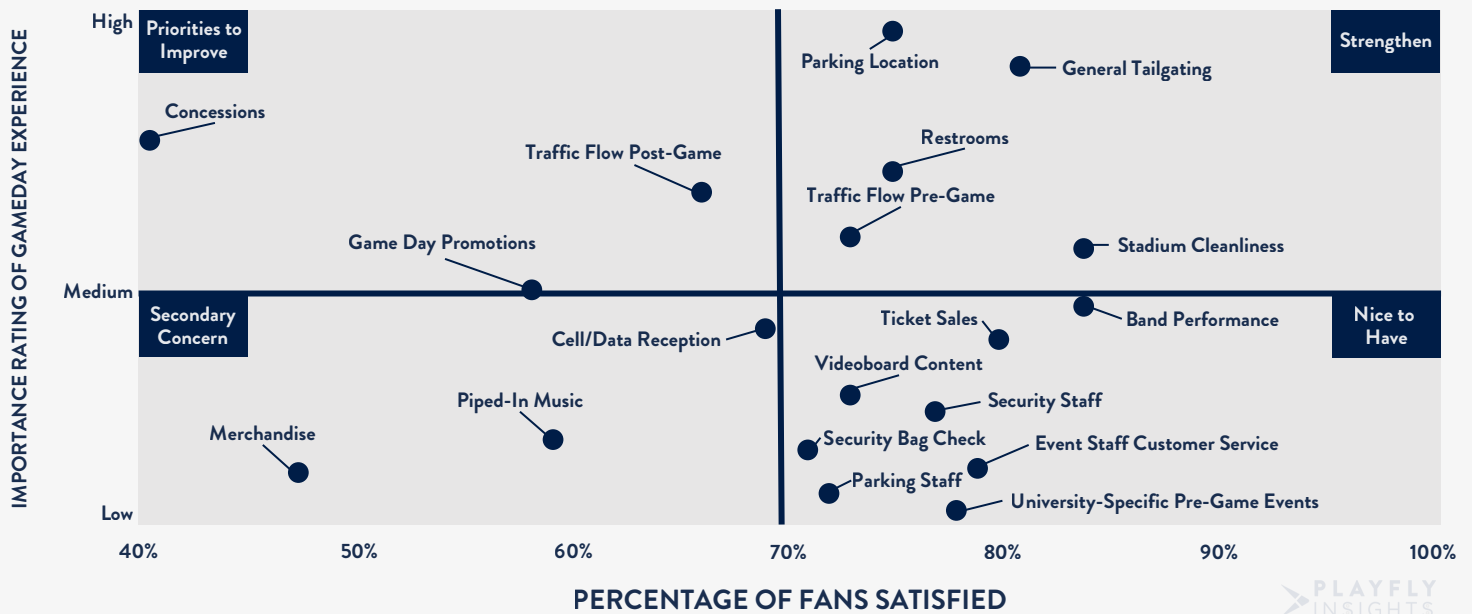
To give our clients a better understanding of how fans are feeling at and around their stadium, Playfly Insights conducted a study to further enhance our knowledge of fan satisfaction through different game day experiences.

CLIENT OBJECTIVE

Identify areas for universities to capitalize on in the form of off-season improvements to the game day experience and season ticket benefit optimization.

THE PLAYFLY APPROACH

Create and analyze a fan experience survey which gathers the strength of fan relationships with the university, attendance motivations and hurdles, ticket purchase and usage trends, satisfaction with various game day elements, and intentions around future seasons.



INSIGHTS AND OPPORTUNITY

Parking and tailgating opportunities are more important than stadium amenities (videoboard content, piped-in music).

Concessions, post-game traffic congestion, and a lack of exciting game day promotional items offered the most room for improvement as the university headed into the 2023 season.



Interested in learning the key game day experiences that your university can improve on? Get started with the Playfly Insights team today!

FAN ACTIVATION CASE STUDY: GAME DAY SPATIAL ANALYTICS

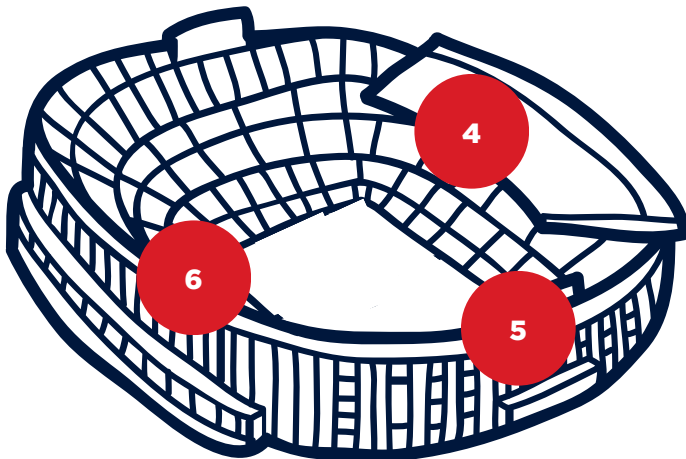
CLIENT OBJECTIVE

Gain deeper insight into consumer behavior and effectiveness around brand activations within the stadium and fan fest areas.

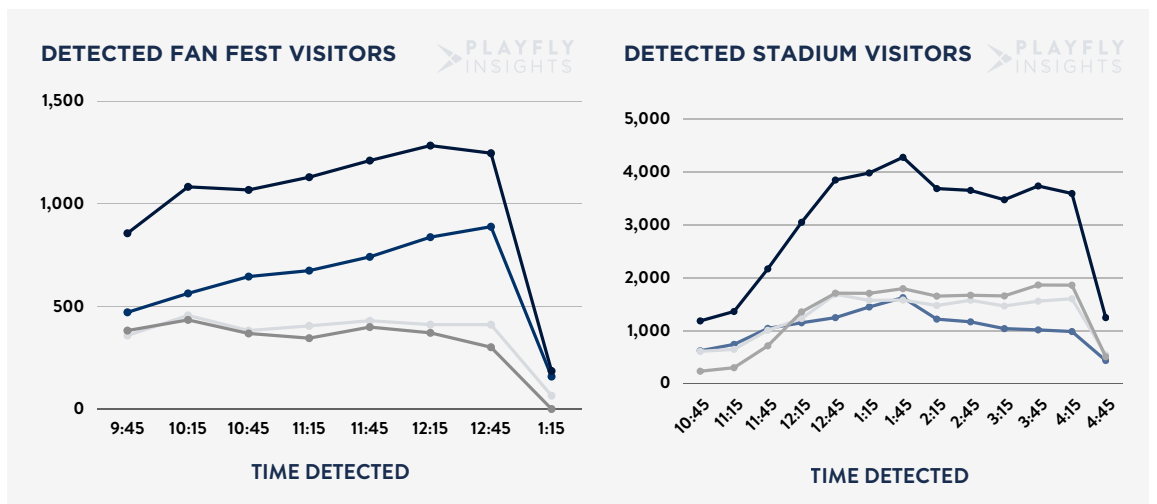
THE PLAYFLY APPROACH

Deployed sensors at different activation sites:

- (3) Fan Fest Sensors
- (3) Stadium Sensors



INSIGHTS



Reach out to playflyinsights@playfly.com to develop a custom study with the Playfly Insights team and better understand your fans' total exposure, average dwell time, conversion rates, peak times, and more!



6. RECRUITING AND RETENTION ANALYSIS

NAME, IMAGE AND LIKENESS

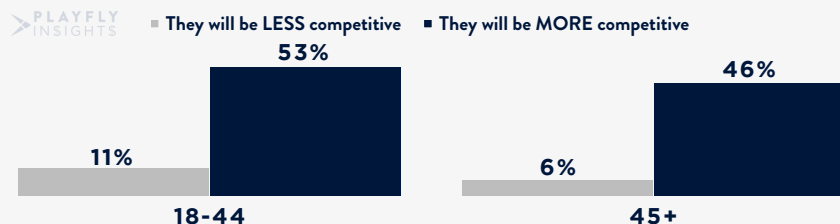
Name, image and likeness (NIL) in the NCAA is still in its infancy. But, it changes everything. In the summer of 2021 student-athletes won the right to sign endorsement deals and earn income through NIL. Never before have student-athletes been compensated for their efforts, and now that transfer athletes can play immediately, we might as well consider this the era of ‘free agency.’

NIL IS TRANSFORMING THE WAY SCHOOLS COMPETE.

NIL adds a new wrinkle to the balance of power across conferences. Whether recruiting high school athletes or attracting college players through the transfer portal, NIL will influence a student-athletes decision on where to play. Universities and colleges need to create robust NIL strategies and align with and promote their Collectives to attract and retain top talent.

Fans overwhelmingly agree that universities that publicize their NIL opportunities will be more competitive with recruitments.

COLLEGE FOOTBALL FANS’ BELIEF OF HOW UNIVERSITIES PUBLICIZING NIL CAPABILITIES WILL EFFECT RECRUITING, BY AGE SEGMENT



Q: Do you believe universities that publicize their student-athletes ability to earn compensation for NIL will be more competitive or less competitive when it comes to recruitment?

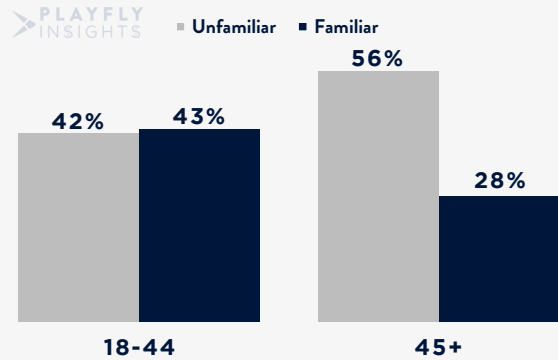
Source: Playfly Insights and Vision Insights Decoder, Oct. 2022 - Jul. 2023

GENERATIONAL AWARENESS ABOUT NIL

Our Playfly Insights team surveyed college football fans about their familiarity with NIL. Our results show

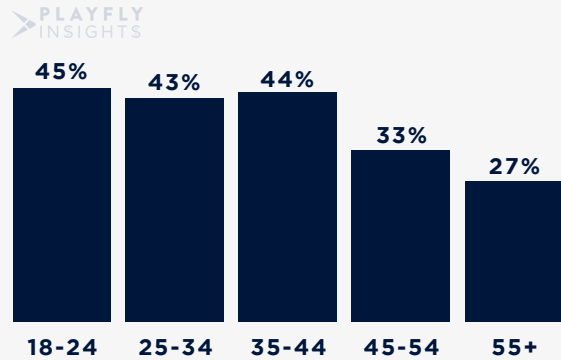
that there is a clear generational divide among college football fans (P18-44 vs. P45+). Younger fans, from college age to mid-40s, are much more knowledgeable about NIL and college sports.

COLLEGE FOOTBALL FANS' FAMILIARITY WITH NIL BY AGE SEGMENT



Q: Are you familiar with what Name, Image, and Likeness stand for in relationship to amateur sports?
Playfly Insights and Vision Insights Decoder, Oct. 2022 - Jul. 2023

COLLEGE FOOTBALL FANS' FAMILIARITY WITH NIL BY AGE SEGMENT - "YES, FAMILIAR"



Q: Are you familiar with what Name, Image, and Likeness stand for in relationship to amateur sports?
Playfly Insights and Vision Insights Decoder, Oct. 2022 - Jul. 2023



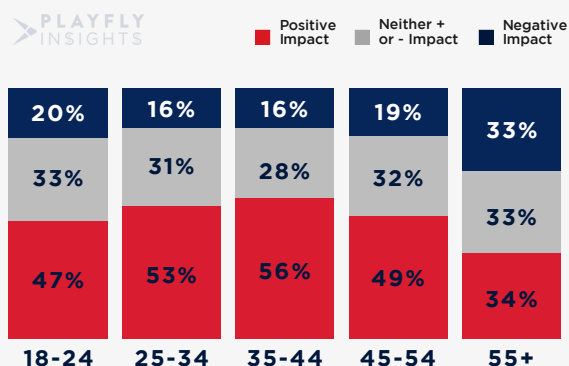
NIL IMPACT ON COLLEGE SPORTS AND COLLEGE ATHLETES

How do fans feel NIL impacts college athletes and the sports they play? Before 2021, the NCAA argued that any form of payment to amateur athletes, from NIL and revenue sharing to employment status, would have a negative impact on fan interest in college athletics.

Since athletes started earning off their name and image, viewership and attendance data for several sports have proven that assumption is incorrect. At Playfly Insights, we have data that supports a positive sentiment for NIL, especially among the younger demographics.

Further, positive sentiments around NIL’s impact on college sports and athletes exceed negative sentiments for all ages, with younger demos being even more positive.

COLLEGE FOOTBALL FAN SENTIMENT: NIL IMPACT ON COLLEGE SPORTS, BY AGE SEGMENT



Source: Playfly Insights and Vision Insights Decoder, Oct. 2022 - Jul. 2023

Positive sentiments are much higher for younger college football fans (P18-44), while seriously dropping for older fans (P55+). The older generations of college football are more resistant to change, a trend we notice in sentiments around realignment as well.

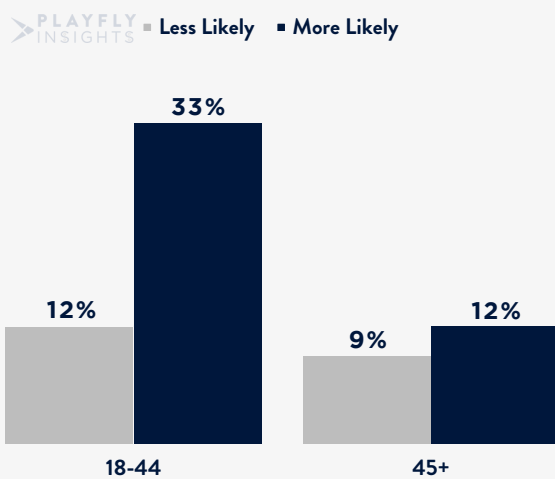
But why? For one, younger fans are more knowledgeable about NIL (see above) and are closer to it through social media activations. This leads to their understanding of the demands that today’s sports environment puts on college athletes; with 30+ hours of practice and travel each week, student-athletes dedicate their lives to their performance. Younger fans seem to recognize the equity in athletes profiting from their efforts and public personas.

The enthusiasm for NIL from young fans presents intriguing opportunities for both athletic programs and brand sponsors looking to engage with younger audiences who are significantly more receptive to brand partnerships with student-athletes.

BRAND OPPORTUNITIES

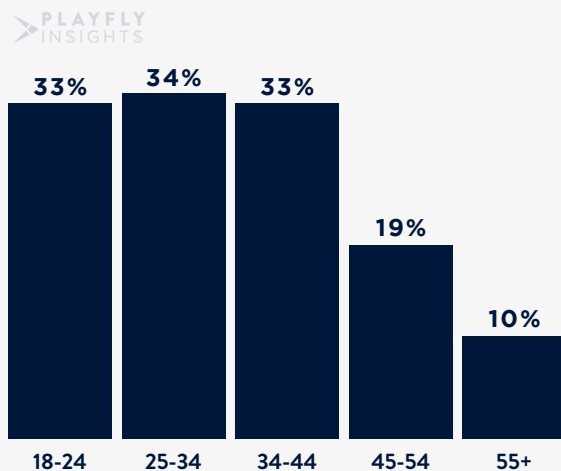
Young college football fans (P18-44) are significantly more likely to consider and buy a brand's product or service when that brand partners with and compensates a student athlete.

COLLEGE FOOTBALL FANS' PERCEIVED IMPACT ON BRAND CONSIDERATION DUE TO A BRAND'S NIL DEAL, BY AGE SEGMENT



Playfly Insights and Vision Insights Decoder, Oct. 2022 - Jul. 2023

COLLEGE FOOTBALL FANS WHO PERCEIVE POSITIVE IMPACT ON BRAND CONSIDERATION DUE TO A BRAND'S NIL DEAL, BY AGE SEGMENT



Playfly Insights and Vision Insights Decoder, Oct. 2022 - Jul. 2023

But where should they start? Since the NIL policy was enacted, the March Madness Tournament and the opening of the college football season have emerged as the dates for brands to circle on the calendar.

Each year, we see increasing numbers of brands, many of which are national, entering the NIL space. Several of these brands have proven the viability of their NIL marketing strategies, evidenced by signing new 'classes' of athletes around each event, [see Dr. Pepper Fansville](#). This release of new NIL deals in August and March hints at a cyclical nature in the NIL space, and brands should look for opportunities to leverage these inflection points in their marketing strategies.





7. PLAYFLY FAN SCORE

Marketers, brands, and athletic departments that are looking to tap into the passion and kinship of college football fandom must activate the audiences that bring the most value.

INTRODUCING THE PLAYFLY FAN SCORE

The Playfly Fan Score (PFS) is the first actionable and insightful sports ranking index geared to marketers and sports business leaders. PFS is a fresh perspective to understanding fan value based on our proprietary factors:

- **Fan Passion**
- **Fan Receptivity**
- **Fan Marketplace**

Rankings shouldn't be up for debate when it comes to business analytics. That's why we partnered with [Vision Insights](#), leaders in sports sponsorship measurement, to develop a custom algorithm to quantify fandom and sponsor performance.

Dig into our Playfly Fan Score: College Football Edition and see who comes out on top.

HOW WE TALLY THE SCORE

The Playfly Fan Score is a composite of three proprietary metrics measuring passion, receptivity, and demand. The index includes public

data, and Vision Insights sponsor data. Contact us for more information about our methodology.

FAN PASSION

Our Fan Passion Score measures enrollment and fan base size, attendance and viewership, team performance, fan engagement and participation, and fan commitment. How do we measure intangibles like fan commitment? We use Vision Insights data to measure loyalty based on fan resiliency.

FAN RECEPTIVITY











Fan Receptivity Score is the measure of a fan's responsiveness to advertising. We measure sponsor recall against actions taken as a result of team sponsorship, positive impressions, consideration, and Forever Fan concentration. Fan Receptivity is powered by our teammates at Vision Insights.

FAN MARKETPLACE

Fan Marketplace Score is a mix of media and advertiser demand and athletic department revenue. It provides an industry first look at how teams are 'valued' by marketers and investors.



PLAYFLY FAN SCORE: COLLEGE FOOTBALL TOP 10 FOR POWER 5


RANKING		SCHOOL	INDEX	SCORE
# 1		ALABAMA CRIMSON TIDE	155	4.43
# 2		OHIO STATE BUCKEYES	153	4.38
# 3		GEORGIA BULLDOGS	148	4.25
# 4		MICHIGAN WOLVERINES	146	4.20
# 5		FLORIDA GATORS	138	3.95
# 6		LSU TIGERS	137	3.93
# 7		TEXAS LONGHORNS	135	3.87
# 8		TEXAS A&M AGGIES	135	3.86
# 9		PENN STATE NITTANY LIONS	132	3.79
# 10		NOTRE DAME FIGHTING IRISH	132	3.79
		POWER 5 AVERAGE	100	2.87
















In order to differentiate teams at the Power 5 and Group of 5 levels, our scores are based on a relative competitive set – all P5 schools vs P5 schools and all G5 schools vs G5 Schools.

RANKINGS DIFFER BY METRIC


We ranked the top five fan bases in each category and were surprised by the results.
















TOP FIVE POWER 5 SCHOOL RANKING



FAN PASSION		FAN RECEPTIVITY		FAN MARKETPLACE	
	OHIO STATE BUCKEYES		CLEMSON TIGERS		OHIO STATE BUCKEYES
	MICHIGAN WOLVERINES		MIAMI HURRICANES		MICHIGAN WOLVERINES
	ALABAMA CRIMSON TIDE		FLORIDA STATE SEMINOLES		ALABAMA CRIMSON TIDE
	GEORGIA BULLDOGS		CINCINNATI BEARCATS		GEORGIA BULLDOGS
	PENN STATE NITTANY LIONS		LSU TIGERS		NOTRE DAME FIGHTING IRISH

POWER 5 CONFERENCE RANKING



FAN PASSION		FAN RECEPTIVITY		FAN MARKETPLACE	
	SEC		SEC		SEC
	BIG TEN		ACC		BIG TEN
	BIG 12		BIG 12		PAC-12
	ACC		PAC-12		BIG 12
	PAC-12		BIG TEN		ACC

CONFERENCE TOP FIVE FOR POWER 5 SCHOOLS

ACC		
# 1		CLEMSON
# 2		FLORIDA STATE
# 3		MIAMI
# 4		NORTH CAROLINA
# 5		PITTSBURGH

BIG 12		
# 1		TEXAS
# 2		OKLAHOMA
# 3		TCU
# 4		OKLAHOMA STATE
# 5		BAYLOR

BIG TEN		
# 1		OHIO STATE
# 2		MICHIGAN
# 3		PENN STATE
# 4		NEBRASKA
# 5		WISCONSIN

PAC-12		
# 1		USC
# 2		OREGON
# 3		UCLA
# 4		WASHINGTON
# 5		UTAH

SEC		
# 1		ALABAMA
# 2		GEORGIA
# 3		FLORIDA
# 4		LSU
# 5		TEXAS A&M

PLAYFLY
INSIGHTS

PLAYFLY FAN SCORE: COLLEGE FOOTBALL TOP 10 FOR GROUP OF 5

RANKING		SCHOOL	INDEX	SCORE
# 1		BOISE STATE BRONCOS	140	3.91
# 2		SAN DIEGO STATE AZTECS	140	3.91
# 3		AIR FORCE FALCONS	131	3.66
# 4		FRESNO STATE BULLDOGS	130	3.63
# 5		NAVY MIDSHIPMEN	130	3.63
# 6		APPALACHIAN STATE MOUNTAINEERS	126	3.51
# 7		SMU MUSTANGS	125	3.48
# 8		UAB BLAZERS	121	3.39
# 9		EAST CAROLINA PIRATES	121	3.37
# 10		MARSHALL THUNDERING HERD	119	3.32
		GROUP OF 5 AVERAGE	100	2.79

In order to differentiate teams at the Power 5 and Group of 5 levels, our scores are based on a relative competitive set – all P5 schools vs P5 schools and all G5 schools vs G5 Schools.

TOP FIVE GROUP OF 5 RANKINGS



FAN PASSION	
	BOISE STATE BRONCOS
	APPALACHIAN STATE MOUNTAINEERS
	SAN DIEGO STATE AZTECS
	EAST CAROLINA PIRATES
	UTSA ROADRUNNERS






FAN RECEPTIVITY	
	NEVADA WOLFPACK
	FLORIDA ATLANTIC OWLS
	NORTH TEXAS MEAN GREEN
	CENTRAL MICHIGAN CHIPPEWAS
	BALL STATE CARDINALS






FAN MARKETPLACE	
	AIR FORCE FALCONS
	SAN DIEGO STATE AZTECS
	UCONN HUSKIES
	NAVY MIDSHIPMEN
	BOISE STATE BRONCOS

GROUP OF 5 CONFERENCE RANKINGS






FAN PASSION	
	MOUNTAIN WEST
	AMERICAN ATHLETIC
	SUN BELT
	MAC
	CONFERENCE USA



FAN RECEPTIVITY	
	MAC
	AMERICAN ATHLETIC
	SUN BELT
	CONFERENCE USA
	MOUNTAIN WEST




FAN MARKETPLACE	
	MOUNTAIN WEST
	AMERICAN ATHLETIC
	MAC
	SUN BELT
	CONFERENCE USA

CONFERENCE TOP THREE FOR GROUP OF 5 SCHOOLS

AAC		
# 1		NAVY
# 2		SMU
# 3		UAB

CUSA		
# 1		UTEP
# 2		JACKSONVILLE STATE
# 3		FIU

MAC		
# 1		TOLEDO
# 2		WESTERN MICHIGAN
# 3		CENTRAL MICHIGAN

MWC		
# 1		BOISE STATE
# 2		SAN DIEGO STATE
# 3		AIR FORCE

SUN BELT		
# 1		APPALACHIAN STATE
# 2		MARSHALL
# 3		LOUISIANA



WANT TO DIG DEEPER?

Our Playfly Fan Score only scratches the surface. Reach out to Playfly Insights today at playflyinsights@playfly.com to learn more about your fans and discover actionable data.

CUSTOM RESEARCH STUDIES

- Fan Satisfaction Study
- Pricing Analysis (e.g., Yield Management, Venue Rescaling, New Inventory)
- Donor, Premium, and Season Ticket Analysis
- TV Visible Signage Assessment
- Recruiting & Retention Study
- Custom Forever Fan Study

FAN SEGMENTATION STUDY

Playfly Insights will help you identify your specific and custom fan segments based on fan behavior and preferences, allowing you to target and activate these segments differently (e.g., ticketing, donations, marketing).

“ALWAYS ON” FAN INSIGHTS

Take a deeper dive into fan profiles with your own annual license to Vision Insights' Decoder media valuation product, plus get actionable data analysis and reporting from Playfly Insights.



FAN FOCUSED, DATA DRIVEN

Playfly Sports is a sports media, marketing and technology business centered around the team, league, brand, and network. Believing in 'Fandom as a Service' and focusing on a consultative, data driven approach to REACH, ENGAGE, MONETIZE AND MEASURE FANDOM gives the company's partners and brands a competitive advantage. Playfly connects more than 2,000 brand partners with approximately 83% of all U.S. sports fans. Through the proprietary platform the business delivers scalable, data-oriented marketing, technology, and media solutions with capabilities including exclusive MMR management, sponsorship sales and activation, streaming, consulting, ticket/premium sales, all along with new revenue-driving platforms and technologies.

Founded in September of 2020, Playfly Sports is now home to approximately 1,000 team members located across 43 U.S. states dedicated to maximizing the impact of highly passionate local sports fans.

Follow Playfly Sports on social media @PlayflySports or visit www.playfly.com



BRINGING FAN INSIGHTS INTO FOCUS

Vision Insights is a congregation of some of the most experienced sponsorship measurement professionals in the world. Their vision is to provide every marketer, rights holder and agency with the most complete resource for fan insights, consumer intelligence and sponsorship performance.