



Sports
Innovation
Lab



HOW WILL YOU KNOW THEY ARE

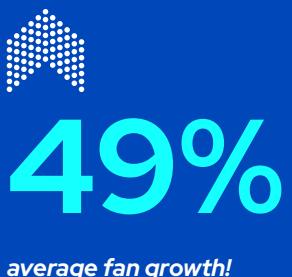
The One

ARE YOU READY TO ENGAGE WITH YOUR COLLEGE SPORTS FAN?

College Sports Brands... Prepare to Meet Your Match!

College Sports is a multi billion-dollar business, and the Community is active and on the go. Live attendance and digital viewership—streaming and social media—have rebounded and surpassed pre-pandemic levels. They are affluent and on the hunt for entertainment, but their profile doesn't end there.

Year over year, we've seen the average fan growth in the College Sports Community increase 49% since 2021. Spending amongst this audience also has grown, with 2024 spend already outpacing that of 2023 by over 20%.



average fan growth!

After making a billion dollars in 2022 ², the NCAA erupted in 2024 with a Caitlin Clark moment that captured the attention of College Sports Fans (and non-fans alike) as they tuned-in to watch records shatter. And it is not just basketball.

According to WBIR Sports, the College World Series National Championship saw the highest viewership in all of college and MLB in 2024 ³, which broke the 2023 record for the event on ESPN the year prior. 2023 was also the year that more than 92,000 fans filled the University of Nebraska football stadium to watch a women's

collegiate volleyball match.

Viewership opportunities are all around, and smart marketers are taking note. Even United Airlines is jumping into the game in 2024, adding 20 nonstop flights and flying larger planes on 115 flights to 30 of the most anticipated college football matchups for the College Football season.

¹<https://biz.opendorse.com/blog/nil-3-opendorse-report/>

²<https://business-law-review.law.miami.edu/the-ncaas-struggle-to-adapt-collegiate-sports-as-a-multibillion-dollar-business/>

³<https://www.wbir.com/article/sports/game-3-cws-national-championship-highest-viewership-college-mlb-2024/51-c5e8ad86-b53d-4361-9135-4b62fda98df2>

At Sports Innovation Lab, we know the College Sports Audience is valuable for two main reasons:

First, a significant portion of this audience has a relatively high income, with 71% earning more than \$100,000 annually, with the largest portion (50%) earning more than \$150,000. The majority of the audience consists of adults between 40 and 60 years old, and 95% of the audience are homeowners, indicating financial stability. For instance, the average College Sports consumer is 5x more likely to spend at Ticketmaster, and they are spending 20% more than the general population at over \$500 per year on average. They are also 2.5x more likely to spend on luxury goods and apparel, as well as splurge on higher-priced retailers, such as Lululemon. This demographic suggests that College Sports Fans typically have high spending power due to their substantial disposable income and stable financial situation.



2.5 TIMES

*more likely to spend
on luxury goods*

Why are College Sports Fans **valuable?**

Why would clients and brands want to acquire this audience?

Second, the College Sports Audience engages with various categories, such as entertainment, active lifestyle, outdoor, and traveling. Due to their engagement with diverse categories, including movies, athletic goods, professional sports, and lodging, we get multiple cross-sections of their lives to peer into. From the Sports Innovation Lab (SIL) Data Cloud, we observe they frequent high-end theaters and MLB games. They are shopping at Dick's and wearing Athleta, traveling on major airlines, and staying at Omni hotels. SIL data provides brands multiple touch points to connect with the College Sports Audience.

Sports Innovation Lab helps the world's leading brands, sports leagues, and teams acquire their ideal match: their **current fan** and their **future fan**—the **Fluid Fan™**. Through our unique Sports Data Cloud, we provide the full picture of the College Sports Audience by analyzing their spending behavior across a variety of interests based on their near real-time transactions. This AI-driven analysis of their consumer behaviors—including media subscriptions, ticket purchases, merchandise sales and other key activities—gives us comprehensive insights. These insights enable us to identify and accurately classify consumers who make up our College Sports Fan Communities. Your perfect match is out there, and it is just a matter of connecting with them at the opportune moment using the Sports Innovation Lab Audience.

Ditch the DISTRACTION

A decoy may "like" or "follow" your sport or your team, making two very different neighbors appear the same on demo data. How will you know your **ideal fan** and identify your **Fluid Fan**? If you want to really know someone, look at where and how they spend their money!

Sports Innovation Lab overcomes the decoy data by integrating a 360-degree view of your audience, including passively collected purchase data—a superior method of predicting future behavior and connecting your brand to the real College Sports Audience at the precise moment they are obtainable. Analyzing their actual engagement across several categories—including entertainment, active lifestyle, outdoor activities, and travel—we observe their diverse interests span professional sports, news, movies, athletic goods, and athleisure-activewear. They shop at specialty retailers and frequently stay at upscale hotels, all while traveling with major airlines. This broad engagement offers brands numerous touchpoints to connect with your **ideal fan** and identify your **Fluid Fan**? Leveraging the SIL College Sports Audience, brands can effectively tailor their marketing strategies to resonate with this multifaceted demographic where they gather.

**WHAT ARE THEY COLLECTING?
WHAT ARE THEY STREAMING?
WITH WHOM ARE THEY
BETTING?
FROM WHAT TEAMS
ARE THEY PURCHASING
AND HOW OFTEN?**

Get Ready to Meet Your **Ideal** Match!

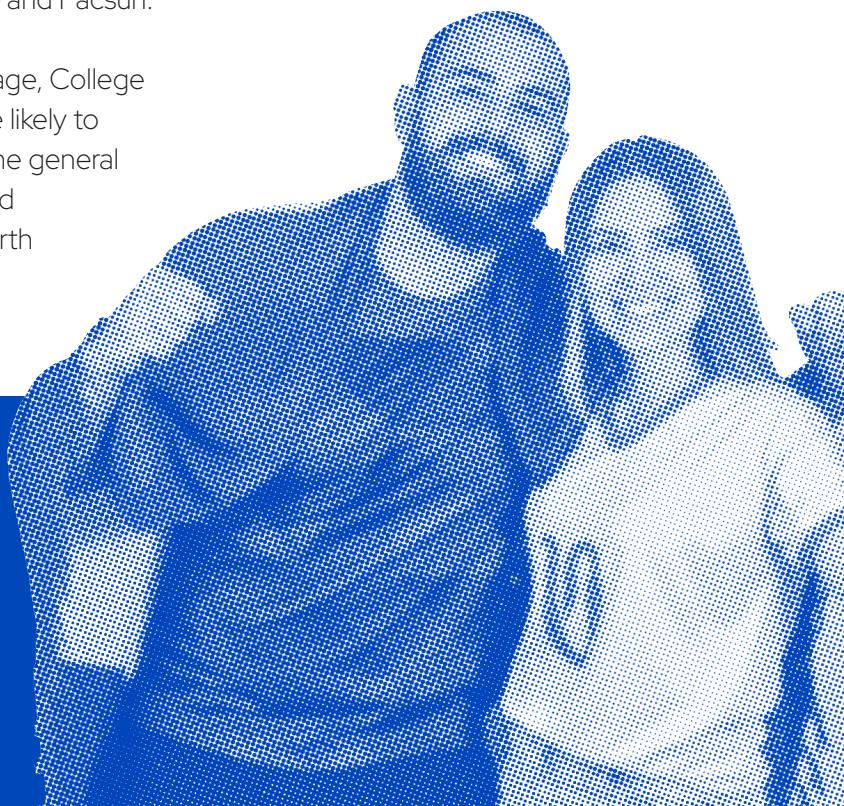
➤ Presenting Joe & Anne

Using our scaled, deterministic audience approach, Sports Innovation Lab presents the symbolic characters Joe & Anne who characterize the ideal College Sports Fans. Joe & Anne are middle-age (median age of 59) with two children in the home. They are financially secure, and they are entertainment-oriented. Dressed in their athleisure, they live an active lifestyle and love to travel. They are waiting to be marketed-to in their home-state of Utah—or Mississippi, Nebraska, South Carolina, or Iowa. Joe & Anne prefer the tried-and-true vehicles from Toyota, Ford, and Honda, but may splurge on a BMW or Tesla. They tend to shop at Publix or Trader Joe's, but also frequent Walmart and Target. They'll stop at Starbucks (over Dunkin') for their morning latte, and they're taking their kids to shop at American Eagle and Pacsun.

Sports Innovation Lab knows that on average, College Sports Fans like Joe & Anne are 2.9x more likely to spend on outdoor retailers compared to the general population. They are **The One** in the crowd waiting to be found by you. Patagonia, North Face, and Alo ... make your move to acquire new consumers, trade up and sell across!

Community Culture:

College Sports are an integral part of American culture, with many universities having a long history of successful athletic programs. Not every big city has their own professional sports team, so you'll find that instead, the community will follow their local college team.



Get ready to meet your **ideal** match!

Locating Joe & Anne

With an abundance of teams across the country that have engaged super fans and casual fans, SIL took an in-depth look at the highest concentration of only College Sports Fans versus the general population. What we found suggests that states with a higher concentration of College Sports Fans, like Joe & Anne, tend to have a lack of major professional sports teams, but have strong college sports programs that may be leading people to engage with college sports more.

States with the highest concentration of college sports fans based on audience per 100k.*

South Carolina (276.5) has no professional franchise from the big five leagues/ strong college sports culture with Clemson Tigers and South Carolina Gamecocks.

Iowa (261.6) has no professional teams/ University of Iowa and Iowa State University with strong sports programs.

Nebraska (226) has no major professional franchise from the big five leagues and few professional sports teams.

Utah (183.5) Prominent college teams, like the University of Utah and BYU. Active participation and interest in college sports events. Cultural and community support for college athletics.

Mississippi (166) has no professional sports teams/major college teams, such as Ole Miss Rebels and Mississippi State Bulldogs.

*Numbers indicate the index of the percent of the College Sports Fan Audience vs the general population.

- Get ready to meet your **ideal** match!

Illuminating Joe & Anne

To identify the top categories that College Sports Fans, like Joe & Anne, engage with and spend relatively more compared to the general population, we set a threshold and ran our insights using our Sports Innovation Lab AI-driven Data Cloud. Note, our threshold was intentionally set to provide a good balance between capturing a significant portion of the audience and maintaining an accurate statistical range.

As a result, we identified seven primary categories with high engagement and spending indices:
(Note: the audience and indices are averages calculated from 2021 through Q2 2024)

- » **1 Professional Sports - Teams**
(Percent of Audience = 22% and Percent of Audience Index = 548)
- » **2 Athletic Goods**
(Percent of Audience = 39% and Percent of Audience Index = 306)
- » **3 Athleisure - Activewear**
(Percent of Audience = 15% and Percent of Audience Index = 421)
- » **4 Entertainment & News - Movies**
(Percent of Audience = 25% and Percent of Audience Index = 270)
- » **5 Specialty Retailers - Outdoors**
(Percent of Audience = 19% and Percent of Audience Index = 292)
- » **6 Lodging & Accommodations - Hotels**
(Percent of Audience = 33% and Percent of Audience Index = 253)
- » **7 Travel - Airlines**
(Percent of Audience = 23% and Percent of Audience Index = 240)

*From these **seven key** categories,*
we were able to better understand the actual data-driven behaviors of your target
College Sports Audience, Joe & Anne.



Joe & Anne are entertainment oriented!



By including passive household spend on professional sports teams, entertainment, and movies, it illuminates that this audience enjoys various forms of entertainment beyond college sports and that they have time for entertainment in their lives. On average, college sports fans are **5.5x more** likely to spend on professional sports teams and **2.7x more** likely to go to the theaters compared to the general population. The College Sports Fan is characterized by their dedication to professional baseball, frequently following teams such as the **Minnesota Twins**, **Atlanta Braves**, and **Houston Astros**. Beyond their passion for sports, they enjoy spending time at Alamo Drafthouse and Cinemark theaters, where they appreciate a premium movie-going experience.



Joe & Anne are outdoor enthusiasts that live an active lifestyle!



This blend of interests highlights their commitment to both active lifestyles and premium, enjoyable experiences, making them a well-rounded and engaged demographic. On average, College Sports Fans like Joe & Anne are **2.9x more** likely to spend on outdoor retailers compared to the general population. Additionally, the SIL Sports Data Cloud demonstrates they gravitate towards stores like **Ron Jon**, **The North Face**, **Columbia**, and **REI**.

When shopping, they can often be found at **BSN Sports**, **Dick's Sporting Goods**, and **Scheels**, where they seek high-quality sports gear and apparel. On average, SIL College Sports Fans are **3.1x more** likely to spend on athletic goods and **4.2x more** likely to spend on athleisure/activewear. Their personal style is reflected in their choice of clothing brands like **Vuori**, **Lululemon**, and **Athleta**. For example, College Sports fans are spending nearly \$350 on Vuori an average of **2x per year** and are **6x more** likely to be spending on Vuori than the general population, making for very powerful insights into this target audience.



Joe & Anne are Travelers!



This College Sports Fan demographic values both the excitement of live sports and the comforts of premium travel and accommodation, reflecting their commitment to a sophisticated and active lifestyle that spans both their leisure and travel preferences. On average, College Sports fans are **2.5x more** likely to spend on hotels and **2.4x more likely** to spend on airlines compared to the general population.

They frequently travel by air, preferring Delta and United Airlines, with an average annual expenditure of over \$1,000 USD on these airlines, making between two and four purchases per year. Their travel experience is complemented by stays at upmarket hotels like **Omni**, **Hyatt**, **Westin**, and **Marriott**, where they stay about two times per year.

There is little margin for error, and the precise manner in which Sports Innovation Lab understands this demographic, makes your marketing window of opportunity incredibly unambiguous.

RECOMMENDATIONS

Brands focused on entertainment, active lifestyles, outdoor enthusiasts, and travelers can focus on College Sports sponsorships, as well as using **Sports Innovation Lab Audiences** to attach to any addressable and programmatic campaign.

Extending your brand's reach in a unique manner by implementing marketing campaigns in states with the highest concentration of College Sports Fans will further increase the effectiveness of these campaigns.

Sports Innovation Lab and **Retail Innovation Lab Audiences** can be found in syndication in all major platforms:

- *Amazon Ads*
- *Google DV 360*
- *LiveRamp*
- *Pubmatic*
- *The Trade Desk*
- *Viant*
- *Xandr*

And can be pushed to social platforms like **Meta**, **TikTok**, and **Snap**.

Additionally, our Audience Desk can create custom audiences to holistically combine all the needed attributes of your target audience through our unified, deterministic data set.

Reach out at audiences@sportsilab.com



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