



LEARFIELD

INTERCOLLEGIATE FAN PULSE REPORT

Empowering the Influence of the **Female Fan**

March 2022



Imagine a typical sports fan.

Did you picture someone enjoying a game with friends?

Is it a person who proudly wears their team's colors?

What's the gender of the fan you imagined?

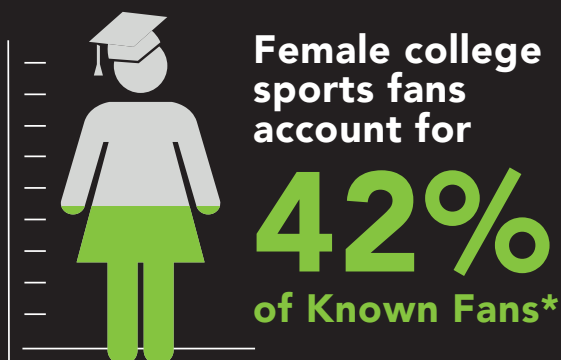
Many people envision a man as the typical sports fan.

But it may surprise you to know that **the face of fandom is changing.**

The **influence and presence of women** within college athletics is strong and gaining momentum.

Schools and brand marketers who understand the female fan and know how to reach her can help build a new community of loyal supporters. Those who don't are missing an important opportunity to engage this increasingly powerful and influential segment of fans.

With the inaugural Intercollegiate Fan Report™ released in 2021, LEARFIELD provided an in-depth analysis of college sports fans by leveraging tens of millions of data points across our newly developed Fanbase™ data and analytics platform.



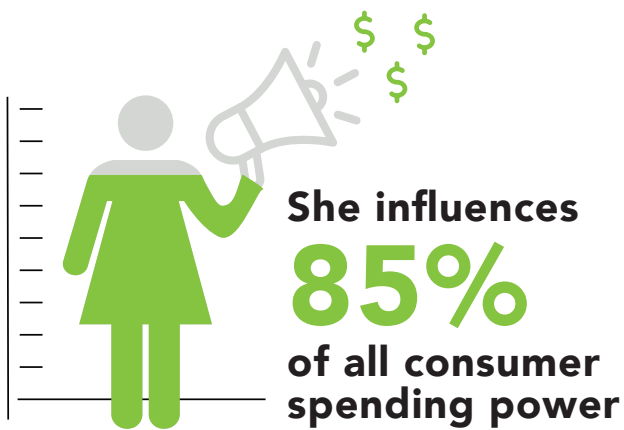
As the initial Fan Report demonstrated, **female college sports fans** account for **42% of Known Fans*** and roughly **48% of social media followers** for college sports. These numbers are likely underreported, considering the lack of ticketing data and information collected for women's sports.



* Known Fans™ have been identified by LEARFIELD's Fanbase as having a direct relationship with a school through ticket purchases, donations, sign-ups, and other transactions.

Consumer Spending Power

Because women influence an estimated **85% of ALL consumer spending**¹, it is critical for brands to better understand and connect with female college sports fans. Yet, research suggests approximately **80-90% of women report feeling that advertisers and marketers do not seem to understand or cater to them.**²



¹Marketing to Women Quick Facts. She-Economy. Retrieved from: <http://she-economy.com/report/marketing-to-women-quick-facts>

²Fast Facts: Marketing to Women. (2019). M2W Marketing to Millennial Women. Retrieved from: <https://m2w.biz/fast-facts/>



Summary of Findings

This Pulse report examines the behavior and influence of female college sport fans. Informed by our in-depth analysis of more than **9 million Female Known Fans**, we will identify distinct segments within the female fan base and how they engage with college sports. We also will illustrate important demographic, engagement, and spending behavior differences in female sports fans—critical information that can help schools and brand marketers improve their outreach and engagement efforts toward these fans.



What do we know about female college sports fans?

Female Known Fans are younger on average than Male Known Fans. Younger female fans also are more likely to have a college education than their male counterparts.



How do women show up as fans?

Female fans make up more than 33% of football and men's basketball tickets, viewership, and social media followers. Women also represent even larger percentages of women's and Olympic sports fans across those three metrics. The number of female followers for college athletics social media accounts continues to grow across most sports and represents a significant majority of followers for women's sports.



Where do women engage more with college sports?

Women's college sports continue to show higher social media growth rates for both male and female followers. Women's athletics record higher engagement rates and a higher percentage of female followers. Brand marketers and schools should increase their focus on women's athletics and social media for both men's and women's college sports to reach female fans.



How can we reach female college sports fans?

A segmentation analysis of female ticket-buying Known Fans suggests that different buying behaviors can be combined with demographic information to identify specific segments of female fans. This insight can help schools and brand marketers better reach these audiences with the right messaging, at the right time, and in the right place.

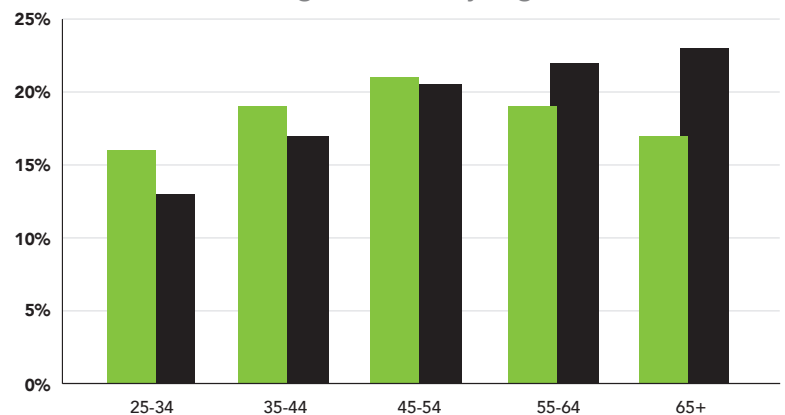
Understanding the Female Fan

Who is she? How does she engage with sports? What can we do better to reach her?

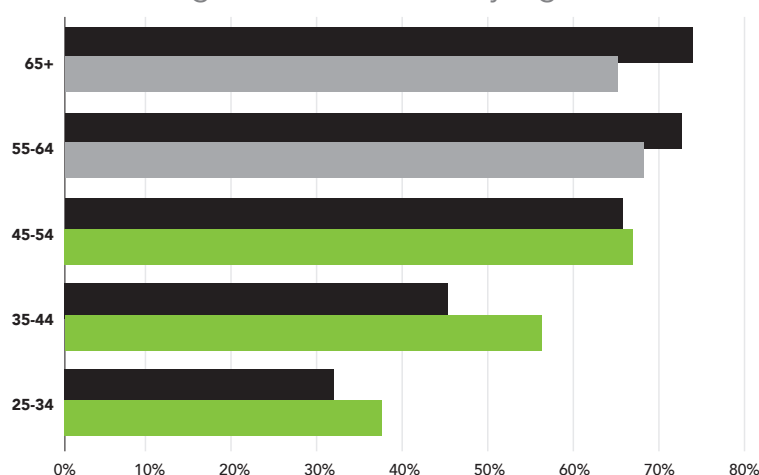
LEARFIELD Fanbase, the industry's leading data and analytics platform, contains more than 9 million Female Known Fans. These female fans make up 42% of all Known Fans with gender information available. This percentage is largely consistent across all regions of the United States. Previous analyses suggest that female fans are a growing segment of college sports fandom with notable differences from male fans.

Female fans are younger Female Known Fans are younger (48.8) on average than Male Known Fans (51.8). These findings are consistent with previous studies, which suggest that younger female fans reported stronger fan sentiment and behaviors such as attending games.³ As the chart to the right illustrates, female fans are more likely to fit into younger age brackets than male fans.

Percentage of Fan by Age Bracket



College Educated Fans by Age Bracket



Younger female fans are more educated

Among Known Fans, **younger female fans (ages 25–44) are more likely to be college educated** than their male counterparts. This difference dissipates within the 45–54 age bracket and then shifts to older males (ages 55+) having the higher proportion of college-educated fans. From 1982 to 2012, women earned an estimated 9.1 million more college degrees than men.⁴

This growing number of female students and alumni are more likely to become fans of the institutions they attended and the athletic teams that represent those schools.

³Newland B., & Hayduk, T. (2020). *Female Sport Fandom: Insights from the Growing Female Market*. New York: Preston Robert Tisch Institute for Global Sport.

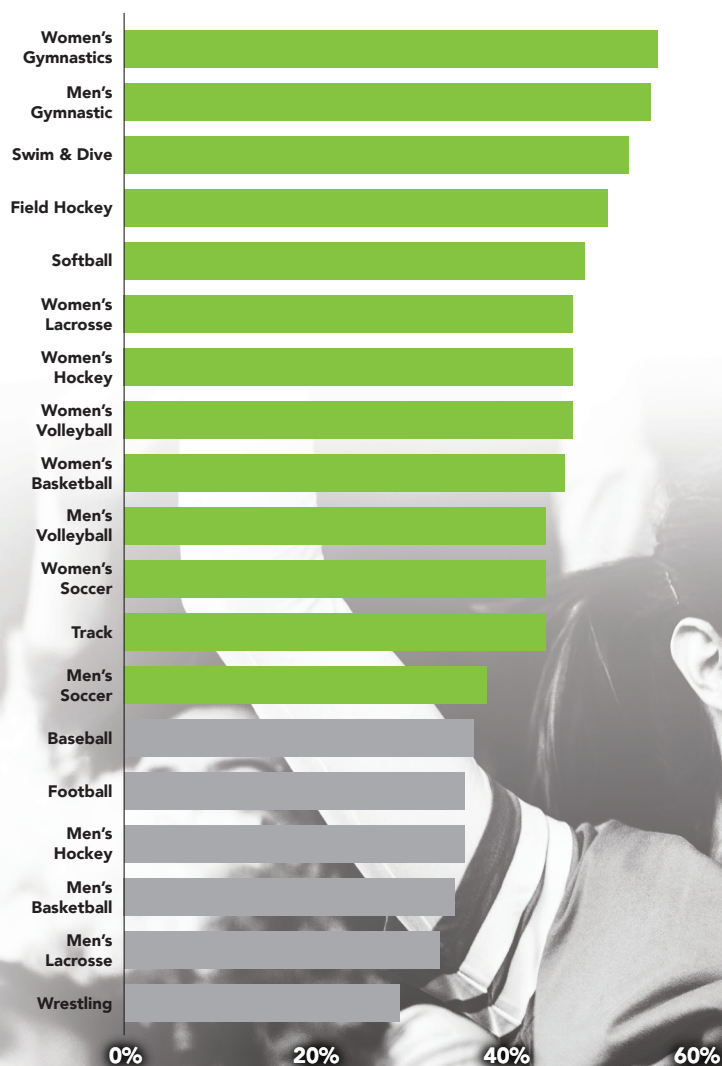
⁴Perry, M. (2013). "Staggering college degree gap favoring women, who have earned 9 million more college degrees than men since 1982." American Enterprise Institute. Retrieved from: <https://www.aei.org/carpe-diem/staggering-college-degree-gap-favoring-women-who-have-earned-9-million-more-college-degrees-than-men-since-1982/>

Female Ticket Buyers

Women are attending games—but what do their purchasing patterns mean in terms of engagement?

Female fans represent more than 1/3 of football & men's basketball ticket buyers.

Percent of Consumers that are Female



These percentages are even higher in southern conferences in terms of ticket purchasing and donations. Female fans tend to have even larger ticket buying representation in women's and Olympic sports. As the chart shows, other men's sports that have higher female fan representation include men's gymnastics and men's volleyball.

Identifying Different Segments of **Female Fans** Based on Ticket Buying Behaviors

To help schools and brands find new ways to connect with female fans, we hope to provide a better understanding of how these fans engage with college sports—particularly through ticket purchasing. A segmentation analysis was performed to identify different groups of female fans based on their ticket buying behaviors among Known Fans within the Fanbase dataset. It is important to note that Known Fans within this dataset are limited to the primary holder of accounts used for ticketing, donations, or other forms of engagement with university athletics. By extension, Known Fans would not include younger fans, student ticket holders, or every member of a household. This segmentation analysis combined demographic characteristics with ticket buying behaviors to help identify specific groupings of female fans. The following analysis looks at four different types of ticket buyers: **Football buyers, Basketball buyers, Average buyers, and Below Average buyers.**

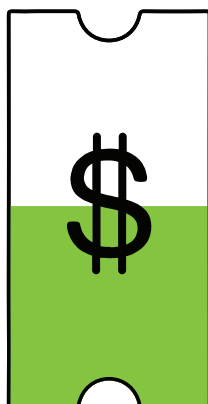
Football Buyers



Basketball Buyers



Average Buyers



Below Average Buyers





Football Ticket Buyers

Female Known Fans who purchase football tickets at above-average rates are college educated and have higher household incomes. These buyers are made up of two primary segments:

1

The first consists of **women who live in big cities**—one of the Top 25 US metro areas. These fans also purchase tickets at the highest rates for Olympic sports, including gymnastics, soccer, volleyball, tennis, lacrosse, and hockey. This finding suggests the opportunity for cross-promotion across different sports.

2

The second segment represents **women who are more likely to live in suburbs**. These women are more likely to be mothers of children 18 and under. They also buy tickets to men's basketball, women's basketball, and baseball at higher rates. This group makes up the largest segment of Female Known Fans at more than 20%.





Basketball Ticket Buyers

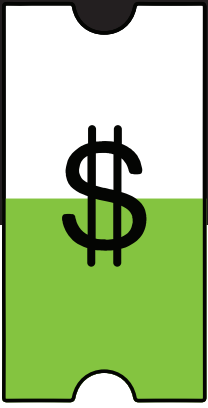
Female Known Fans that buy basketball tickets tend to be older, have fewer children in the household, and live in moderately populated—or suburban—areas. Two segments make up this portion of female fans, and, interestingly, both also purchase baseball tickets at higher rates.

1

The first segment is the most **highly educated**. These fans hold graduate degrees and have an above average household income. They support men's and women's basketball but gravitate a bit more toward the women's game. Given this group's age and income, collaboration with brands targeting older or higher income consumers could be beneficial for schools and brands.

2

Besides having a strong interest in both men's and women's basketball, the second segment of fans also **buys tickets at higher rates for baseball and softball**. This group does not hold college degrees and their household income is below average. One potential way to reach this fan base would include investing in multi-sport content and sponsorships.



Average Ticket Buyers

These fans buy tickets at about average rates across almost all sports among **Female Known Fans**. The only exception is that men's basketball purchases are below average for both segments that make up this group.

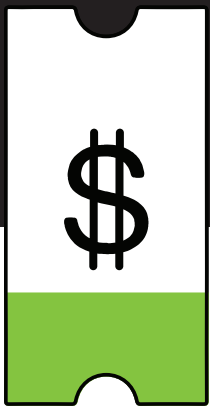
1

The first segment consists of women who hold **graduate degrees** and have the **highest household income** of any female group in Fanbase. They are also older and live in large cities.

2

Women in the second segment of this group have college degrees but tend to live in rural areas and have **below average household income**. They are also more likely to be mothers with children under the age of 18 in their home and in charge of household activities and spending. Offering family or discounted ticket packages may encourage this group to attend more games.





Below Average Ticket Buyers

The final group of **female ticket buyers** generally makes purchases at below average rates across all sports. They are less likely to be college educated, and the two segments in this group are the two youngest female segments across the Fanbase dataset. These are the next generation fans who will influence household decision making as it relates to brand affinity and consumer spending.

1

Women in the first segment **live in big cities** and have **average household income**. Although less common than other segments, they tend to purchase football or men's Olympic sport tickets.

2

Fans in the second segment are **mothers who live in the suburbs** with **below average household income**. This group represents the lowest rates of ticket buying across nearly every sport.



Understanding female college sports fans at this level of detail is critically important for schools and brands looking to optimize their marketing efforts.

Knowing how the different segments tend to buy tickets across sports provides opportunities for schools to better cross-promote ticket or donation opportunities to a particular group. Brand marketers can benefit by ensuring that their messaging and activation is well suited for the specific demographics of the type of female fan that purchases tickets for a given sport.

Female Fan Engagement

How do we create more authentic and meaningful connections—meeting female fans where they are?

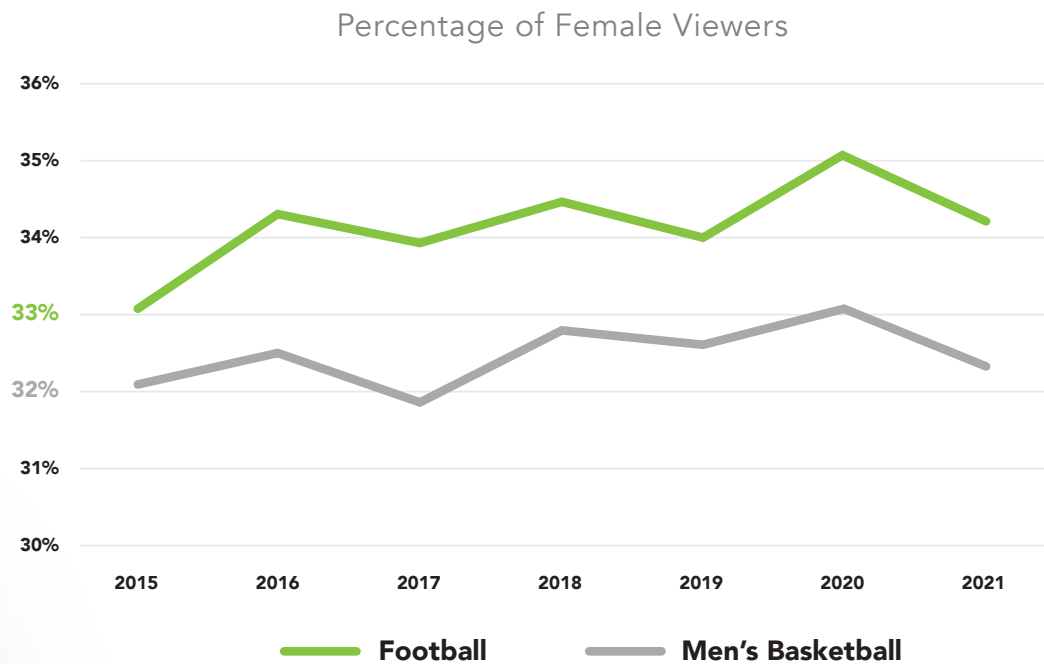
Television Viewership

There is no doubt that television coverage helps build and reinforce fan affinities, making the medium a key component in engaging all fans. When it comes to female fans, the importance of investing in sponsorship and media rights has an impact on the overall brand impressions via TV, streaming digital video, and social media engagement.



TV Viewership: Football and Men's Basketball

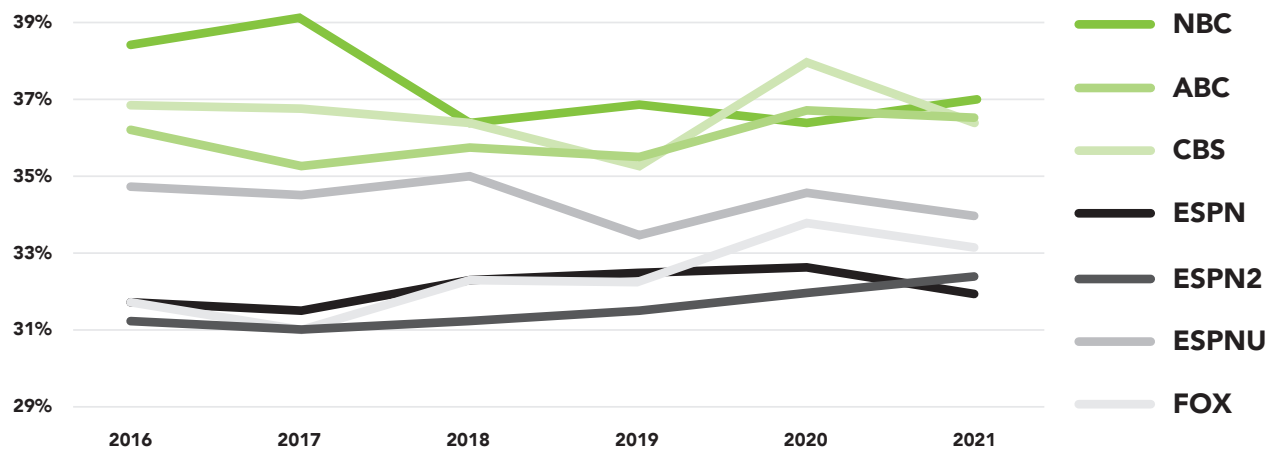
The chart below shows the percentage of female viewers for both football and men's basketball since 2015. These percentages reveal that approximately **32% of basketball viewers and 34% of football viewers are women**. While football viewership percentage spiked in 2020, the trend of increasing female viewership continues.



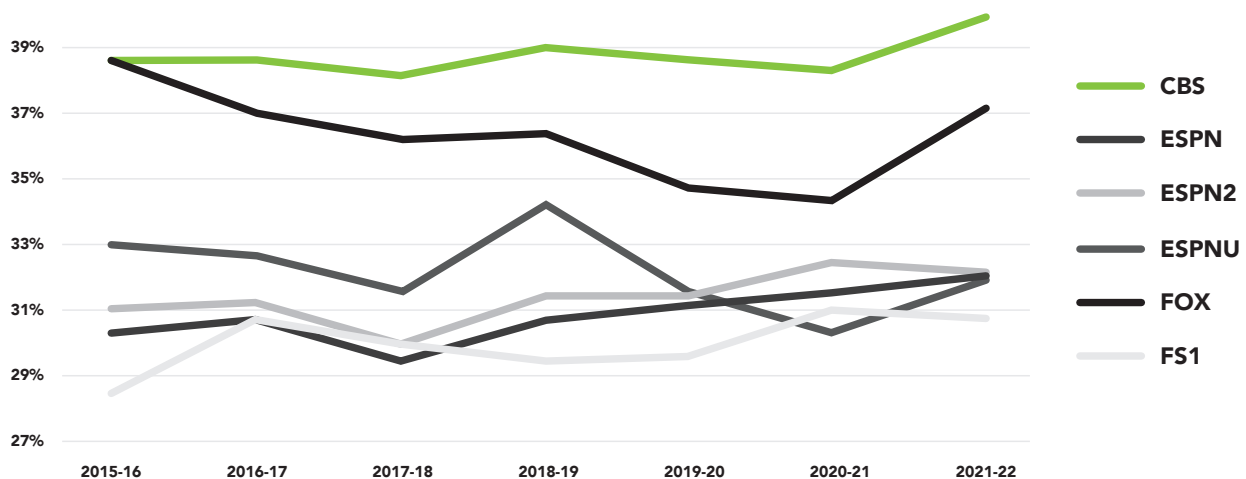
TV Viewership: by Network

A closer look at **female viewership** of these sports across **major networks** suggests that female fans are more likely to watch major networks (CBS) over cable (ESPN). The charts below show a higher percentage of female viewers across major networks for both sports.

Football: Percentage of Female Viewers by Network



Men's Basketball: Percentage of Female Viewers by Network



This data suggests two possible trends for female fan viewership:

1

These networks carry games that appeal to female fans (Ex. female fans make up a larger percentage of SEC fans, and therefore watch CBS, which holds the broadcast rights with the conference).

2

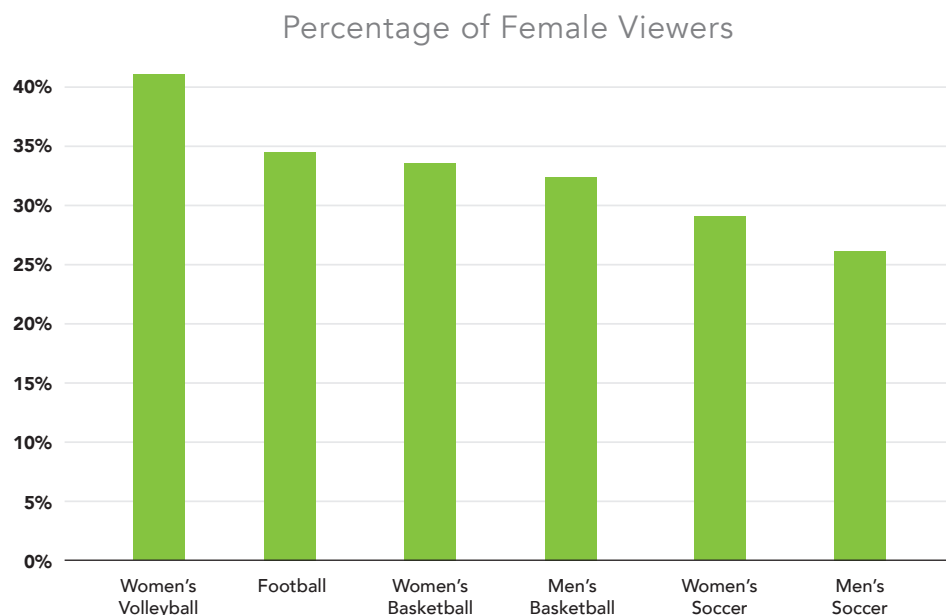
Given that **female fans are younger** on average, they are more likely to be part of the “cord-cutting” or “cord never” generations that are much less likely to pay for cable television packages. According to Pew Research, women have shown a 21% decrease in cable/satellite usage overall since 2015.⁵ Therefore, they are more likely to watch games on streaming services and free over-the-air channels or look for audio programming that allows them to follow the games and multi-task.



⁵Rainie, L. (2021). “Cable and satellite TV use has dropped dramatically in the U.S. since 2015.” Pew Research Center. Retrieved from: <https://www.pewresearch.org/fact-tank/2021/03/17/cable-and-satellite-tv-use-has-dropped-dramatically-in-the-u-s-since-2015/>

TV Viewership: Across College Sports

Football and men's basketball are the most televised college sports in both viewership and coverage. Many other college sports, including most women's sports, still receive some broadcast coverage across regional networks and secondary channels. The chart below illustrates the percentage of female viewers across a variety of college sports.



Viewership from Sept. 1, 2001–Feb. 10, 2022

Not surprisingly, women's sports also report a high percentage of female viewers. Women's volleyball in particular carries the largest percentage of female viewers with 41%. It is evident from these numbers that female fans represent a significant portion of fans tuning in to watch all forms of college sports. Female fans' increased representation in sports like gymnastics and

volleyball also suggests that they are likely turning to streaming services and other digital methods to follow these sports which are often not broadcast on traditional or cable networks. Human interest content about college athletics programs and the athletes who participate in them and other related storytelling vehicles can be an important way to reach female college sports fans.

Digital Engagement via Social Media

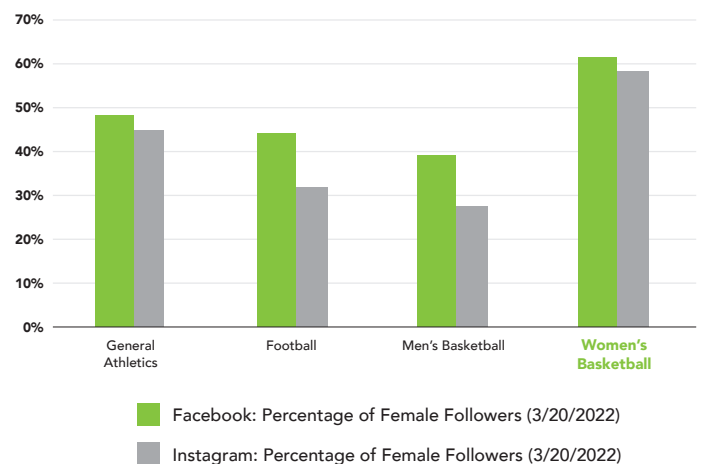
Female fan engagement continues to grow and is largely taking place via digital outlets, specifically social media. Women make up the majority of social media users across the US and, as demonstrated by our initial analysis of Known Fans in the 2021 Intercollegiate Fan Report, **female fans account for an estimated 48% of college sports followers across social media**. By contrast, official athletics' websites see less traffic (31.6%) from female fans—a significant under index compared to female representation among Known Fans and social media followers. This indicates that women prefer getting their news and information about their college sports via social media due to their multi-tasking and “on-the-go” lifestyle.

Social Media: Female Followers

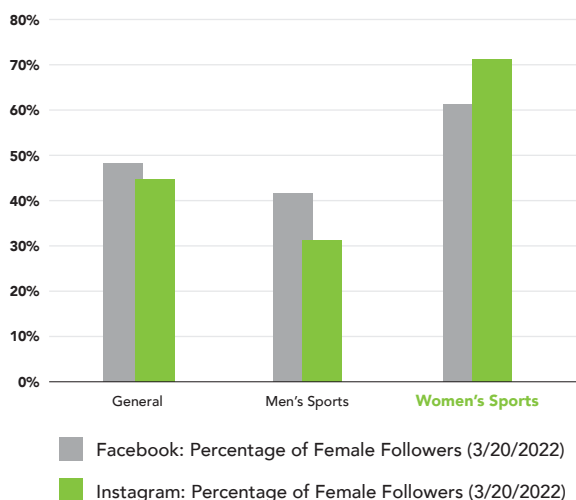
For this report, further analysis was limited to data collected from a sampling of Facebook and Instagram college athletic social media handles. Facebook and Instagram both maintain a strong female presence; **54% of Facebook users⁶ and 56% of Instagram users within the United States are women.⁷** Additionally, among followers of these college athletic handles, female fans make up 48% of Facebook users and 40% of Instagram users.

When compared to the percentage of Female Known Fans, the chart to the right shows a similar percentage of female followers for general college athletic accounts. Football also maintains a large percentage of female followers across Facebook and Instagram (44% and 32%, respectively), but the **largest percentage of female fans were found among women's basketball.**

Female Followers by Sport



Female Followers by Sport (Gender)



Analyzing the differences between gendered sports reveals that women make up an overwhelming majority of followers for women's sports, representing 71% of Instagram followers and 61% of Facebook followers. The chart to the left shows a similar breakdown when grouping sports by gender. These differences are particularly evident **on Instagram, where female fans make up 71% of women's sports** followers but only 31% of men's sports.

⁶Statista Research Department (2022). "Share of Facebook users in the United States as of December 2021, by gender." Statista. Retrieved from: <https://www.statista.com/statistics/266879/facebook-users-in-the-us-by-gender/>

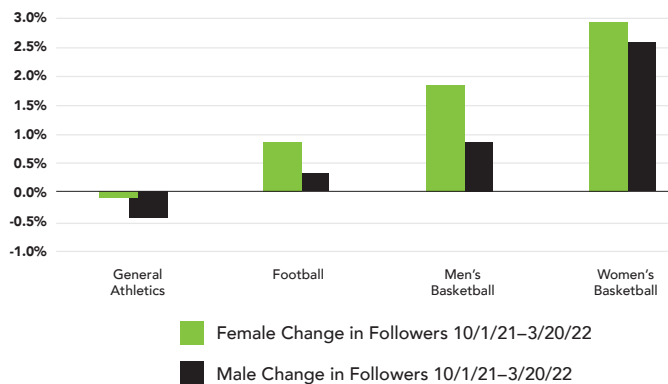
⁷Statista Research Department (2022). "Distribution of Instagram users in the United States as of December 2021, by gender." Statista. Retrieved from: <https://www.statista.com/statistics/530498/instagram-users-in-the-us-by-gender/>

Social Media: Growth

To further investigate the impact of female fans on social media, shifts in followers were analyzed for college sports accounts across Facebook and Instagram from October 1, 2021–March 20, 2022.

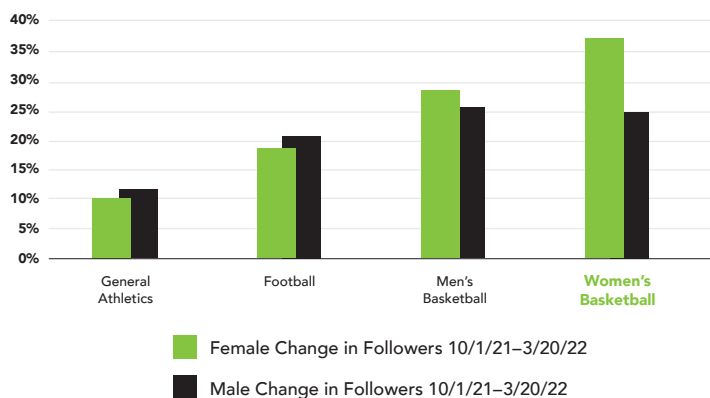
During this time, Facebook growth was largely stagnant across each sport although **female followers outpaced male followers**.

Facebook: Percentage Change in Followers



Instagram followers grew at significantly higher rates across each category. As the chart below illustrates, female followers showed substantial growth rates across football (18%) and men's basketball (28%) like their male counterparts (26%). This continued growth across all sports suggests that brands can and should be reaching out to women as fans of both men's and women's sports.

Instagram: Percentage Change in Followers



Women's basketball saw the highest increase in followers across both genders, increasing male followers by 25% and female by 37%.

With the ongoing growth of women's college sports, brands should be engaging more with fans of women's sports and leaning heavily into social media as the key to reaching them.

Social Media: Engagement Rates

Social media accounts for women's sports typically have fewer followers, posts, and impressions across social media platforms. However, they typically show similar or **higher engagement rates** than men's sports or general athletic accounts. While the potential audience may be smaller, this higher level of interaction can serve as a useful indicator of fan passion and reach.

For an analysis of engagement rates^c across college sports accounts, data was collected from Facebook, Instagram, and Twitter^d handles from June 2021–March 2022. Women's basketball maintained the highest engagement rate on Facebook after an initial surge in the summer.

During this same period, Instagram demonstrated higher engagement rates overall. Both football and men's basketball maintained strong engagement rates alongside women's basketball. By January 2022, women's basketball surpassed both football and men's basketball with the season well underway.

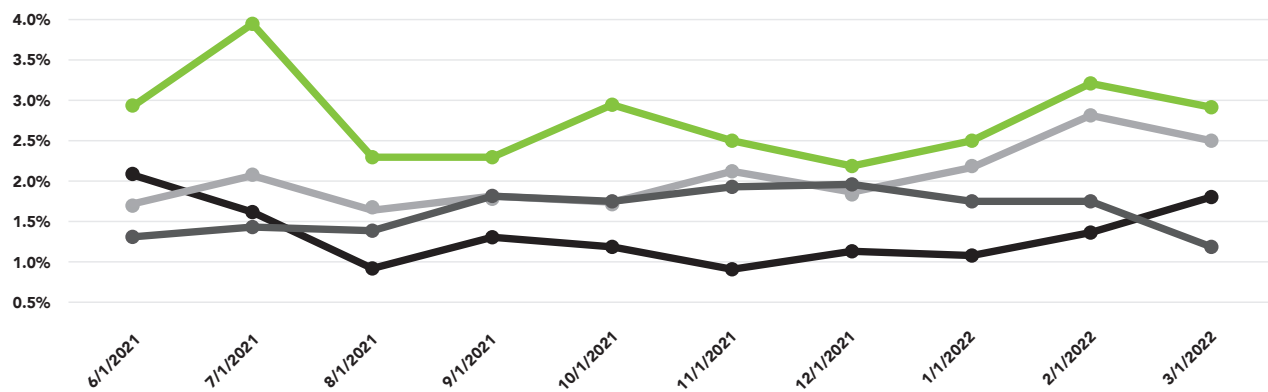
On Twitter, engagement rates were significantly lower but also showed women's basketball with a higher initial engagement rate during this time. The start of football season coincides with an increase for both football and general accounts, yet January shows women's basketball engagement rates increasing with basketball seasons underway.

Strong engagement rates are essential for distributing content across social media. **With women's sports showing a larger percentage of female followers and high engagement rates, the potential for brands and schools to reach these audiences through social media is apparent.**

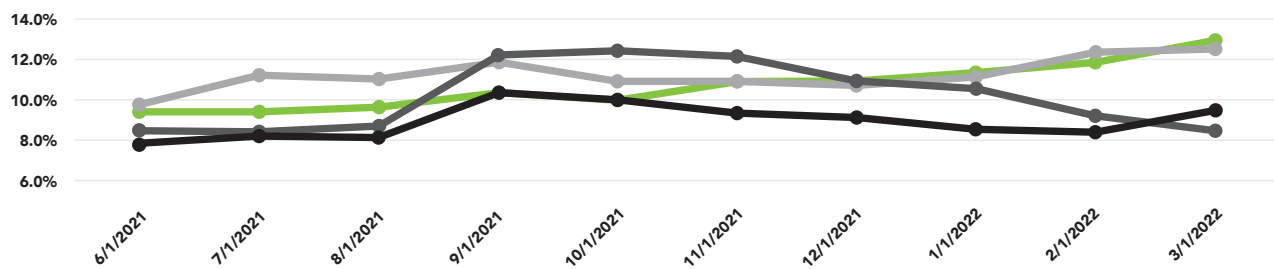
^cEngagement rates are defined for each platform as follows:
Facebook & Twitter: (Likes + Comments + Shares) / Impressions
Instagram: (Likes + Comments) / Impressions

^dTwitter data was not included in previous social media analysis due to a lack of data on gender representation.

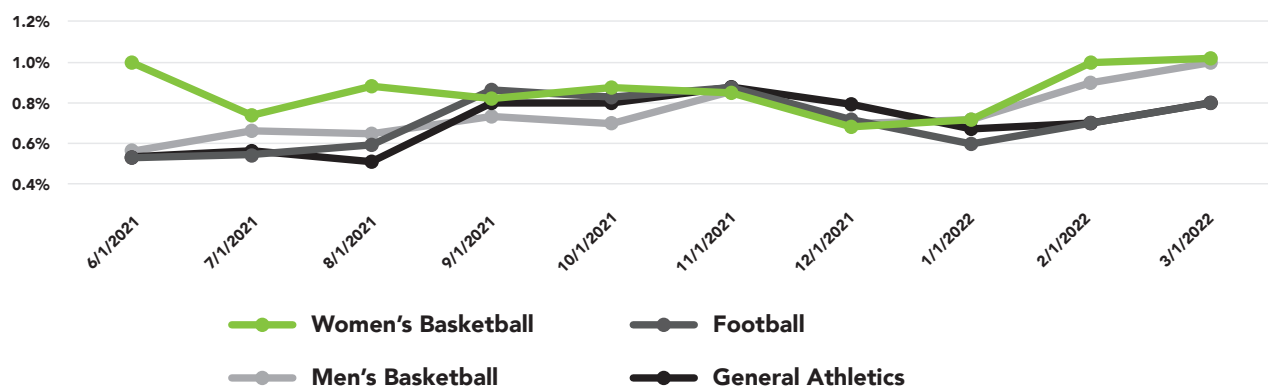
Facebook Engagement Rates by Sport



Instagram Engagement Rates by Sport



Twitter Engagement Rates by Sport



The Spending Power of **Female Fans**

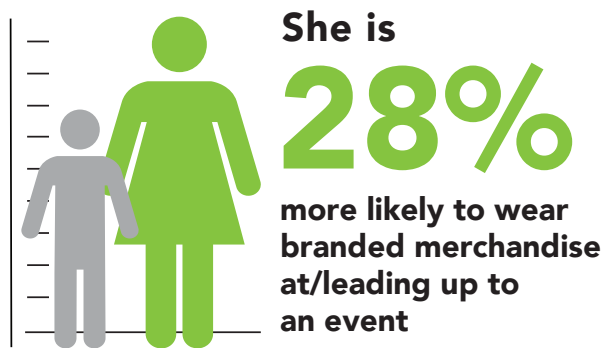
We know that women are engaging with college sports, but how do brands harness/influence their spending behavior?



Female Known Fans account for \$530 billion in household spending power, with 31% earning incomes of more than \$150k. It is estimated that 80% of all sports apparel dollars are directly influenced by women.⁸

Recently, LEARFIELD's Collegiate Licensing Company (CLC) reported a \$14 million increase in women's apparel spending from October 2020 to September 2021. Five out of seven women's apparel categories have shown positive yearly growth while equaling 16.28% of all apparel sold. The fastest growing category, athleisure, has grown 87% in the past year. Apparel companies such as Lululemon are not only entering the collegiate space by offering licensed apparel, but also expanding their other offerings due to high demand. **The tremendous growth of the women's college apparel market, along with female fans' overall spending power makes them a crucial demographic that marketers must reach.**

Market research has shown that female fans are largely motivated to buy college athletics apparel due to gameday events, school affinity, and supporting family members or friends who are enrolled or alumni of the school.⁹ Analysis



of female college sports fans suggests that they are 28% more likely than the rest of the US population to wear branded merchandise while attending or in preparation for an event.¹⁰ There is also a difference in consumer behavior between mothers and those who do not have children, with moms being 18% more likely to purchase branded merchandise and reporting higher amounts spent on collegiate apparel.¹¹

Higher spending for moms is consistent with earlier segmentation analysis related to ticket buying, which found that the largest and most actively engaged group of female ticket buyers was suburban mothers. This suggests that these fans are not only active, but also including members of their family in their fan activities and that their increased spending is likely attributed to buying for others. A 2016 collegiate purchasing study found that **3 in 10 of all college merchandise purchases included gifts for others**, most commonly children or a spouse.¹²

With the convenience of online shopping and limited selections in traditional brick-and-mortar stores, female fans largely report a preference for shopping and making purchases online. As women are the most active users of social media, their potential spending influence should be recognized. Additionally, **female fans who are mothers are 68% more likely to trust product recommendations from celebrities or online influencers.**¹³

The growth of the female fan base across social media platforms (reflecting increased affinity) combined with known shopping and engagement patterns (often guided by influencers) can be leveraged by brands to further increase their own reach.

⁸Watson, C. (2015). *Fanbase Economics: Engaging female fanbases*. Futureof.org
Retrieved from: <http://futureof.org/sports-2015/fanbase-economics/>

⁹What Women Want: Maximizing the Female Fan Apparel Opportunity. IMG College Licensing.

¹⁰YouGov, 1.16.22

¹¹YouGov, 1.16.22

¹²Collegiate Purchasing Study (May 2016). Collegiate Licensing Company.

¹³YouGov, 1.16.22

Conclusions

Female college sports fans represent a significant and growing population within college athletics. This group is particularly important for brand marketers and schools given the tremendous influence that women have over consumer spending (approximately 85%). Through an in-depth analysis of female fans, this report has shown that **Female Known Fans engage with every sport**—from male-dominated games like football to Olympic sports such as gymnastics. Schools and brand marketers should focus their efforts online to reach female fans, as their behavior demonstrates a preference for social media, shopping online, and using streaming platforms and attending live events to engage with sports that are less likely to be broadcast on television.

QUICK GUIDE: How to Focus Your Efforts to Leverage Her Influence

For **schools**, this means:

- Creating targeted and engaging content based on the demographics and purchasing behaviors outlined throughout this report
- Pursuing sponsorship and marketing brand partnerships to include women's teams and other sports beyond football and basketball
- Developing a strong social media presence for both men's and women's sports teams
- Ensuring it's easy to shop online for tickets, merchandise, and memorabilia
- Developing a robust content strategy for popular sports like gymnastics, softball, field hockey, and other sports beyond football and basketball that incorporates streaming opportunities

For **brands**, this means:

- Creating targeted and engaging content based on the demographics and purchasing behaviors outlined throughout this report
- Pursuing sponsorship and marketing opportunities beyond football and basketball to include women's teams and other sports such as gymnastics, field hockey, and volleyball to reach more household decision makers
- Leveraging both digital and social media opportunities to reach female fans where they're already consuming content
- Tailoring marketing messages to speak to a female audience in an authentic and trustworthy way
- Leveraging collegiate sports influencers, together with school intellectual property and marks to build trust
- Ensuring easy access to shop for your products online

For more information on how LEARFIELD can help improve your fan engagement strategy, contact us at: www.learfield.com/contact-us

Data & Methodology

Data for this analysis was gathered from a variety of sources within LEARFIELD, leveraging information from across the largest media and technology company in college sports. To examine the shifts in demographics (age, income, distance, etc.) for Female Known Fans, the report relied on LEARFIELD's proprietary Fanbase data. The Fanbase data platform now includes data from more than 120 universities, consisting of more than 33 million individual, de-duplicated fan records and over 3 billion data points.

Ticketing and donation data from 30 properties and more than 23 million customers was sourced from Fanbase using Ticketmaster and Paciolan Powered by LEARFIELD, the most popular ticketing software platform used in collegiate athletics. Segmentation analysis on Female Known Fans was produced using Python and a K-Medoid Clustering package.

Apparel data and insights were provided by the Collegiate Licensing Company (CLC), the largest collegiate licensing company in the industry.

Analysis and development of the report was completed by LEARFIELD's Fanbase™ team.



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