

March 2025

# PLAYFLY SPORTS FANSCORE:

## College Basketball Edition



*Powered by Vision Insights*

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# 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.

**FanScore is our branded series of thought leadership reports and white papers that provide in-depth analysis on a wide range of sports-related topics.** Whether exploring the behaviors and preferences of specific sports fanbases or examining key trends shaping the business of sports, FanScore delivers data-driven insights that help industry professionals stay ahead of the game.

Each report is meticulously crafted to offer valuable takeaways, from fan engagement metrics to emerging market opportunities, making FanScore an essential resource for brands, teams, and stakeholders looking to navigate the evolving sports landscape.

**Decision-makers in clubhouses, boardrooms, and newsrooms leverage our data insights to uncover fan trends, preferences, and behaviors.** Our data and analyses 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.

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# Executive Summary

***College basketball occupies a unique and cherished position in American sports culture, with its significance reaching a peak during March Madness.*** The Men's and Women's NCAA Basketball Tournaments captivate millions of fans each year. People come together to cheer for Cinderella upsets, long-standing rivalries, and the inspiring stories behind the student-athletes. And of course, they take part in the exciting annual tradition of bracket competitions—whether in workplaces, social circles, or online communities. This widespread engagement underscores the tournament's impact beyond the court, making it not just a collection of live basketball games but a cultural phenomenon.

***The popularity of men's college basketball is further driven by storied programs with deep-rooted rivalries and passionate fan bases.*** Universities like Duke, Kentucky, North Carolina, Kansas, Villanova, Michigan State and many more have built reputations on sustained success, iconic coaches, and a proven track record of producing NBA talent. Its popularity is also undeniably fueled by the personalities of student athletes and even the unique stories of teams, current or historical, such as the University of Michigan's "Fab Five," the first team in NCAA history to compete in the men's championship game with all-freshman starters in the early 1990s.

***On the women's side, the NCAA Women's Basketball Tournament has experienced unprecedented growth,*** propelled by increased media coverage, elite talent, and heightened fan engagement. The D1 Women's Basketball Championship game last year between University of South Carolina and University of Iowa shattered viewership records as it became the most-watched game in women's college basketball history and, furthermore, the most-watched basketball game - at any level - since 2019 <sup>1</sup>. Attendance records for the NCAA Women's Basketball Tournament have been broken over the past two years, achieving an all-time attendance record of 436,055 fans <sup>2</sup>. ***Players like Caitlin Clark and Angel Reese have become transformative figures, elevating the visibility and marketability of the women's game while also inspiring future generations.***

Overall, basketball's accessibility and community presence make it one of the most widely played sports across the United States, contributing to its enduring popularity. Furthermore, basketball is the only sport played by every Division I program. ***Whether played in school gymnasiums, community courts, or local parks, the sport resonates with people of all ages, making it a vital part of American life and culture.***

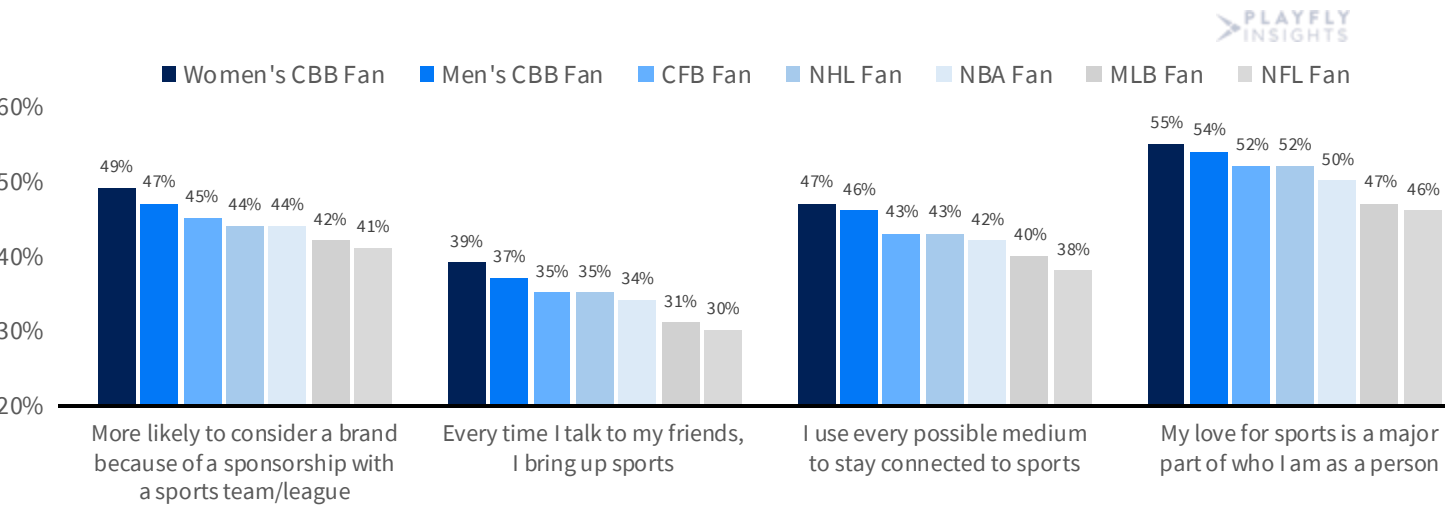


# 1. Demographics and Fan Avidity

The college basketball fan demographic is youthful and diverse. Men's college basketball attracts approximately 88 million male fans and 58 million female fans, while women's college basketball engages around 70 million male fans and 56 million female fans. *This widespread appeal across genders highlights the sport's broad and balanced reach.*

DEMOGRAPHICS	GENERAL POPULATION %	MEN'S COLLEGE BASKETBALL FAN %	WOMEN'S COLLEGE BASKETBALL FAN %	MEN'S COLLEGE BASKETBALL FAN INDEX	WOMEN'S COLLEGE BASKETBALL FAN INDEX
<b>GENDER:</b> Male	49%	60%	56%	123	114
<b>GENDER:</b> Female	51%	40%	44%	78	86
<b>HOUSEHOLD INCOME:</b> \$100K+	25%	30%	30%	121	119
<b>AGE:</b> 18-54	59%	64%	65%	108	110
<b>RACE:</b> African American, African, or Black	13%	15%	16%	113	124
<b>RACE:</b> Hispanic, Latinx, Central American, or Spanish Origin	14%	14%	15%	99	103
<b>RACE:</b> Asian American, Hawaiian Native, or other Pacific Islander	6%	7%	7%	105	106
<b>RACE:</b> Caucasian or White	69%	67%	66%	98	95

*The emotional connection fans have with college basketball is profound.* More than 50% of basketball fans consider their passion for sports an integral part of their identity<sup>3</sup>, highlighting the sport's influence on personal and social connections. This strong attachment also fosters heightened loyalty, making fans more likely to engage with and support brands that sponsor college athletic programs.





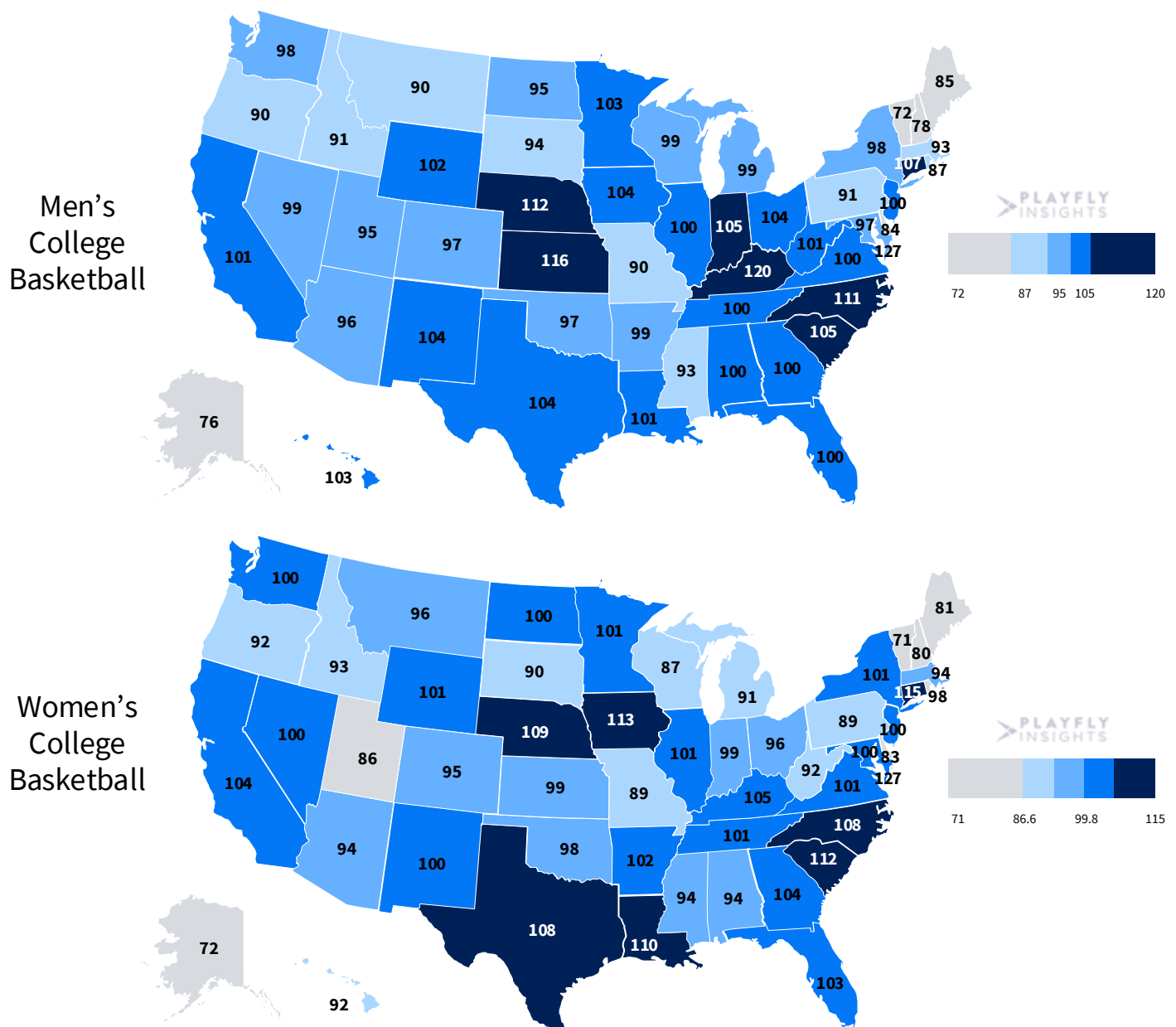
*The demographic and behavioral traits of college basketball fans set them apart from fans of other sports in the United States.* Their youthful energy, racial and gender diversity, deep emotional investment, and strong sense of community enrich the sport's culture while also offering valuable opportunities for brands and marketers to engage with a highly passionate audience.

## REGIONALITY

Men's and women's college basketball fandom is widely distributed across the United States, but certain states exhibit higher concentrations of fans. *College basketball plays an especially prominent role in the sports culture in certain regions*, driven by historical dominance, powerhouse programs, and deeply ingrained traditions.

Index to General Population

### INDEX OF MEN'S & WOMEN'S COLLEGE BASKETBALL FANS BY STATE



## HERE'S WHAT WE SEE:

**Southeastern Hotbed:** States such as Kentucky, North Carolina, and Indiana show particularly high engagement in both men's and women's college basketball. This is largely due to legendary programs like Kentucky, Duke, North Carolina, and Indiana, which have long-standing traditions, intense rivalries, and devoted fan bases.

**Midwestern Strongholds:** The Midwest, including states like Kansas, Iowa, and Nebraska, demonstrates significant support for both men's and women's basketball. These states also house powerhouse programs like Kansas, Iowa, Iowa State, and Nebraska where basketball serves as a central part of local sports culture.

**Southern Enthusiasm:** The Southern states, particularly Tennessee, South Carolina, and Louisiana, show strong engagement, especially in women's basketball. Programs such as South Carolina and LSU have gained national prominence thanks to recent NCAA titles and game-changing personalities from coaches, Dawn Staley and Kim Mulkey, drawing in massive fan bases and increasing the sport's visibility.

**Western & Mountain Region Growth:** While historically dominated by football, states like Arizona and Colorado exhibit increasing engagement in college basketball, fueled by successful programs and growing media exposure.

**Coastal Variations:** The Northeast exhibits varied levels of engagement in college basketball. Connecticut stands out due to the dominance of Uconn's women's and men's basketball programs. The UConn women's team has secured a record 11 national championships, solidifying their status as a powerhouse in women's college basketball, while the men's team is in search of a threepeat in this year's March Madness.

### 2025 NCAA Tournament

#### CLOSEST 2025 NCAA TOURNAMENT TEAM TO EACH US COUNTY



## 2. College BB Viewing Trends

### MONTHLY REGULAR SEASON VIEWING PAST 3 SEASONS

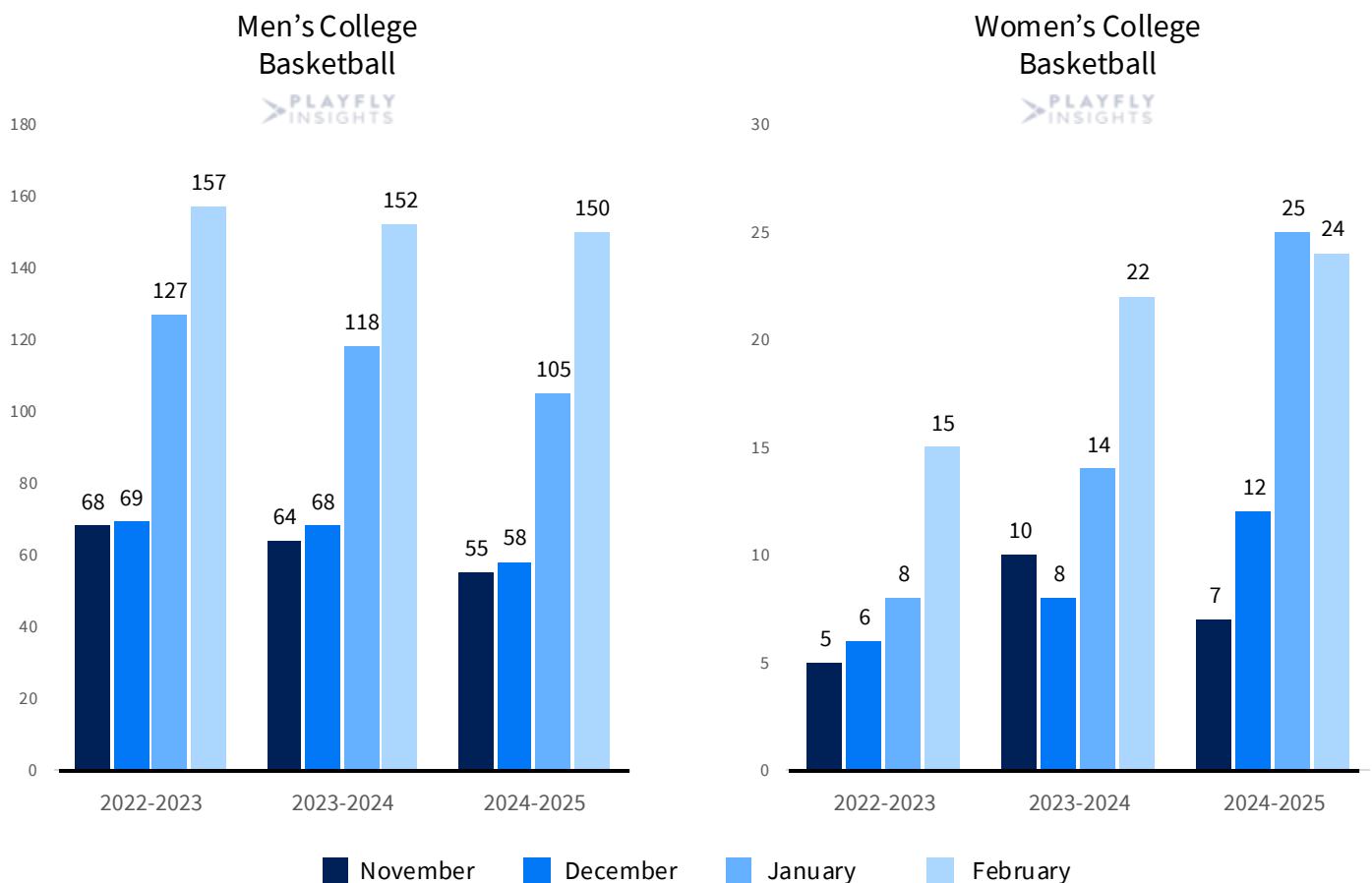
Viewership for the 2024-25 *men's regular season has seen a decline of about 9%, likely influenced by the absence of traditional powerhouses* such as Kansas, North Carolina, and Syracuse from the top 25 rankings. Collectively, these three programs have experienced a **22%** drop in viewership through the end of the regular season<sup>4</sup>.

*On the women's side, viewership continues to shine, even in a post-Caitlin Clark era.* Ratings are flat **0%** from last season, but up an astounding **73%** from two seasons ago<sup>4</sup>. Rising stars like Flau'jae Johnson, Paige Bueckers, and Juju Watkins are propelling the sport's momentum, setting the stage for what promises to be an electrifying 2025 NCAA Tournament.

### HERE IS A LOOK AT MONTHLY VIEWING OVER A 3-YEAR PERIOD FOR MEN'S AND WOMEN COLLEGE BASKETBALL:

*Note: Men's viewing consistently see viewing levels double in January vs. Nov/Dec. Women's viewing steadily rises by month, culminating with strong viewership in February.*

#### MEN'S & WOMEN'S COLLEGE BASKETBALL VIEWERSHIP BY SEASON





## 2024 -25 REGULAR SEASON VIEWING BY MATCHUP – MEN’S

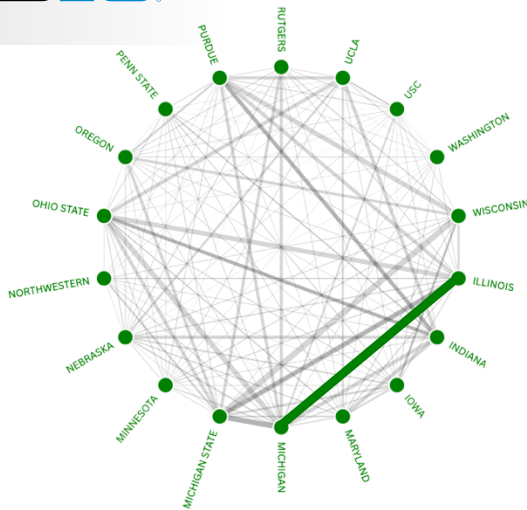
The graphs below clearly illustrate how pivotal certain teams were to the overall success of their respective conferences this past season. *How to read: Each circle represents a men’s conference. Each line represents a matchup within that conference. The size of the line is the size of the persons 2+ Nielsen tracked tv audience for that game.*

2024/25 Season

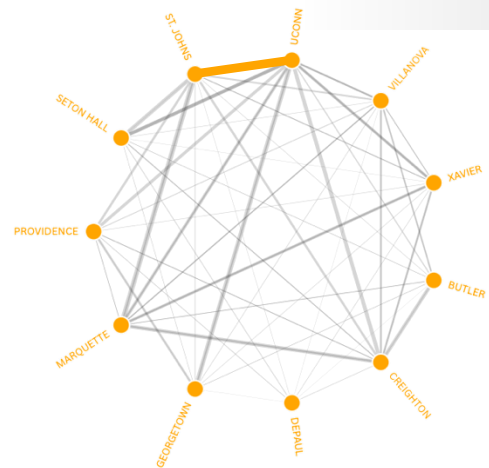
### MATCHUPS BY MEN’S COLLEGE BASKETBALL TEAM

*Highlighted lines denote most watched regular season games within conference*

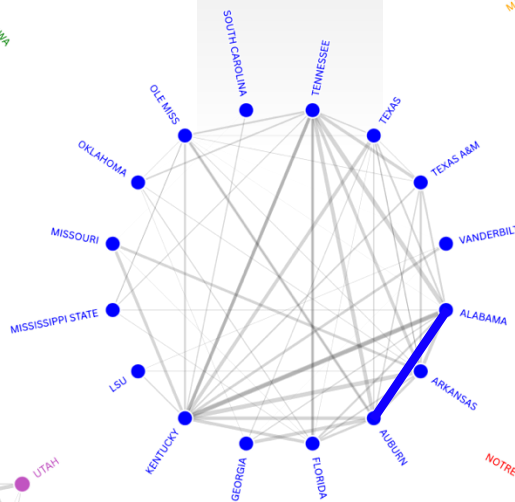
**BIG**



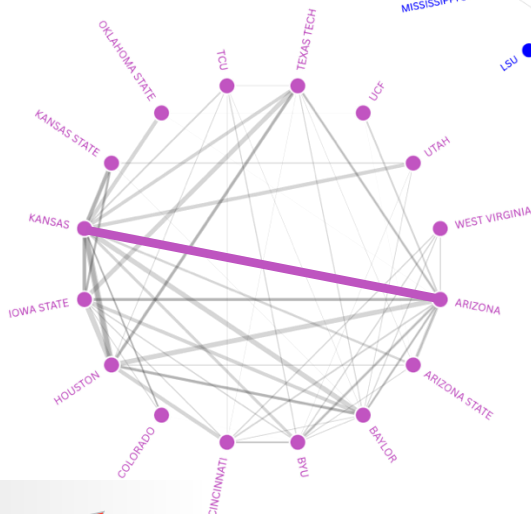
**BIG  
EAST**  
CONFERENCE



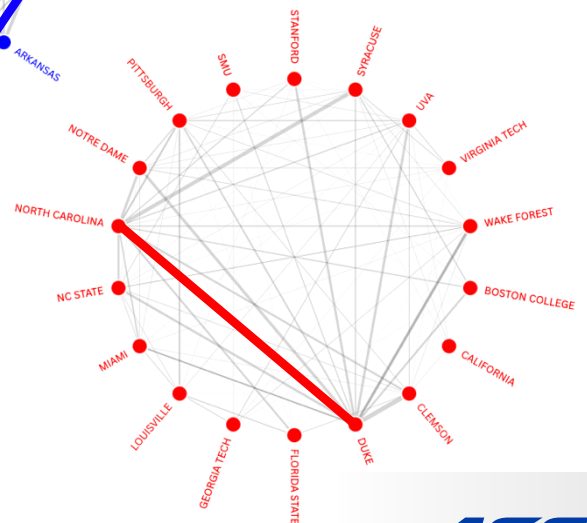
**SEC**



**XII**



**ACC**



## 2024 -25 REGULAR SEASON VIEWING BY MATCHUP – WOMEN’S

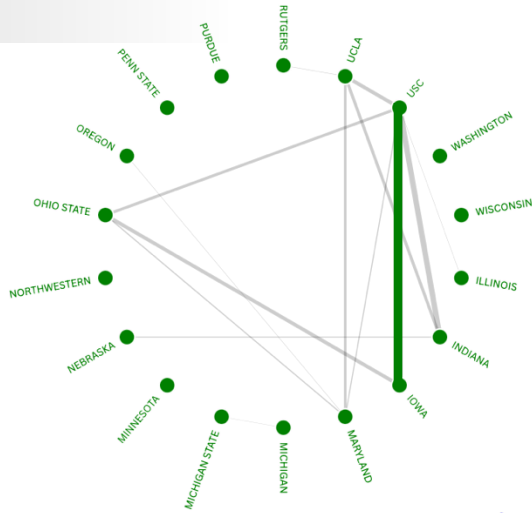
The graphs below clearly illustrate how pivotal certain teams were to the overall success of their respective conferences this past season. *How to read: Each circle represents a women’s conference. Each line represents a matchup within that conference. The size of the line is the size of the persons 2+ Nielsen tracked tv audience for that game.*

2024/25 Season

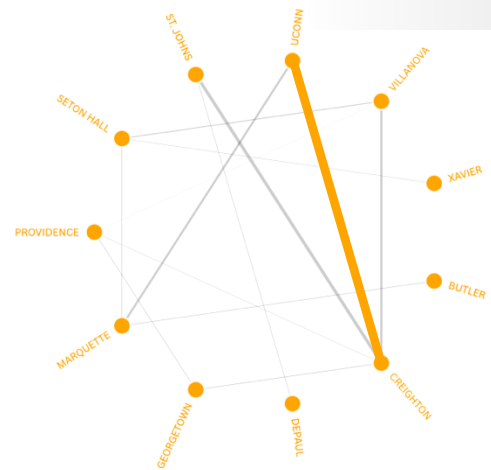
### MATCHUPS BY WOMEN’S COLLEGE BASKETBALL TEAM

Highlighted lines denote most watched regular season games within conference

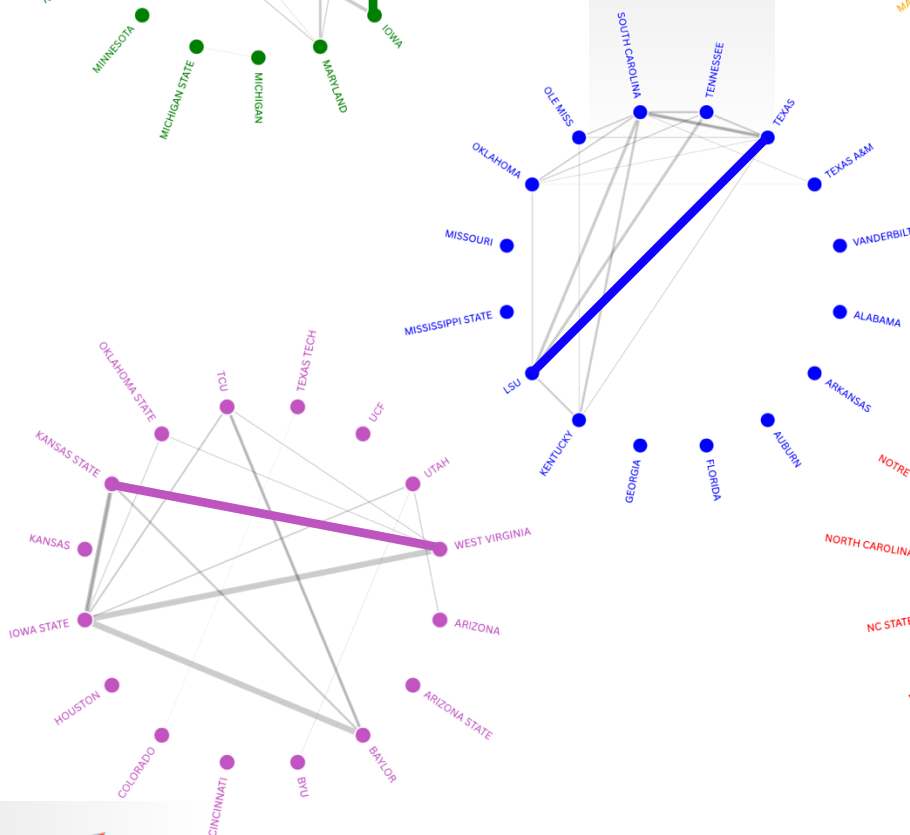
**BIG**



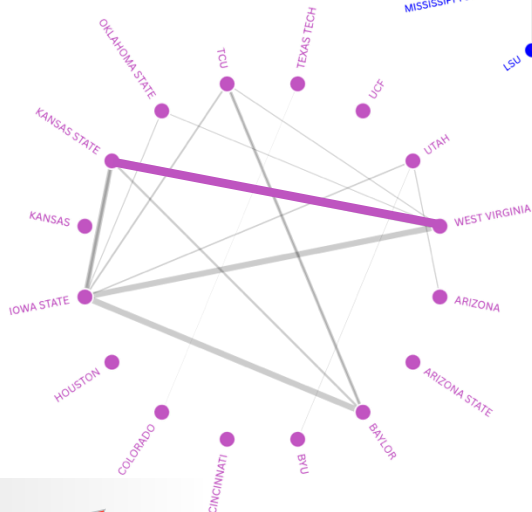
**BIG EAST**  
CONFERENCE



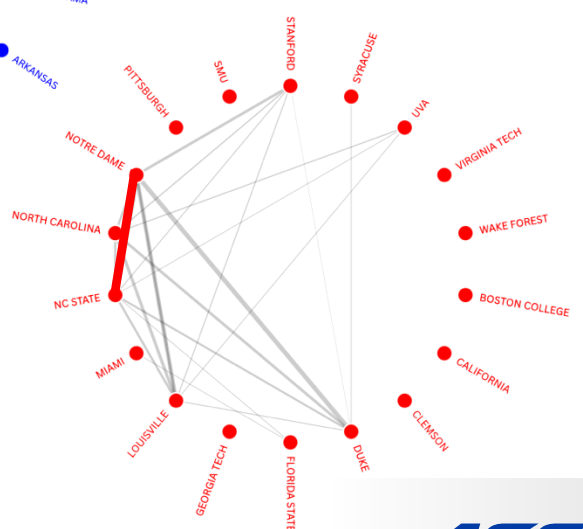
**SEC**



**XII**



**ACC**

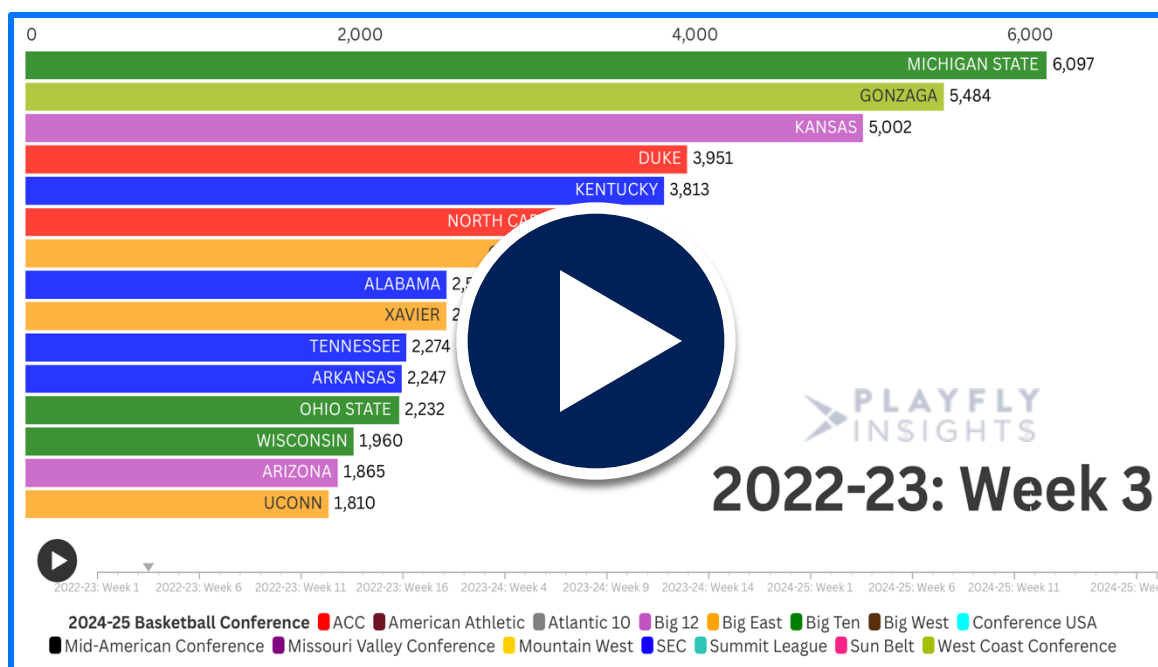


## WHICH TEAMS ATTRACT THE MOST VIEWERS – A 3 YEAR HISTORY

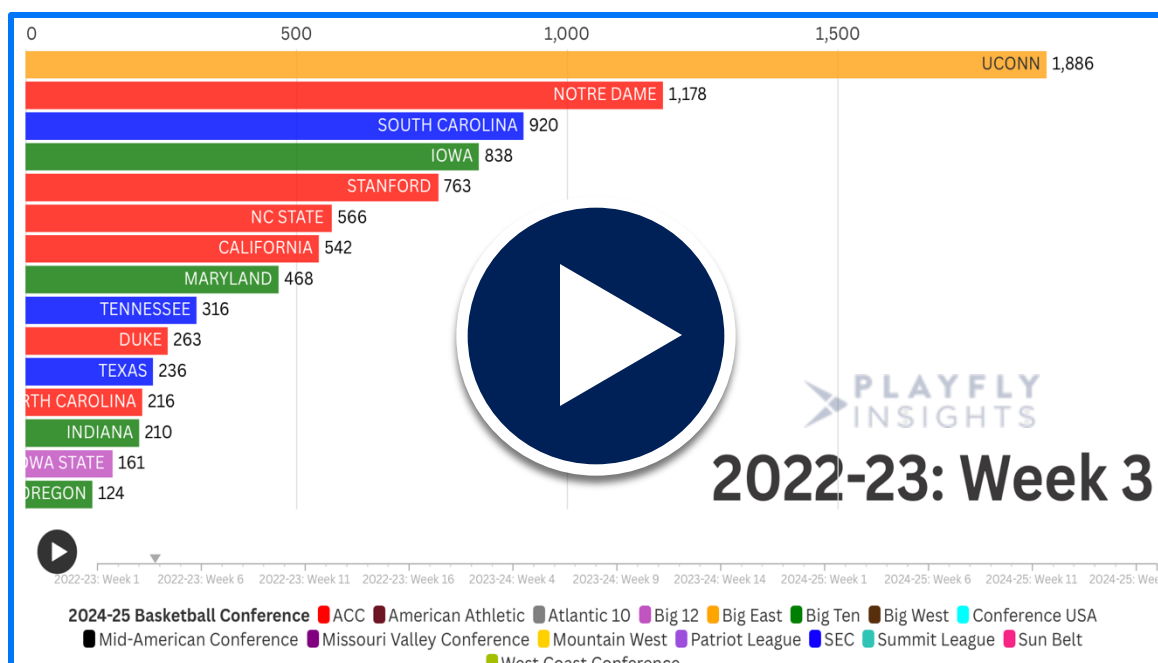
The charts below show a three year weekly aggregated viewing analysis.

(Aggregated Persons 2+ Impressions By School: 2022/23 – 2024/25 Seasons)

**ON THE MEN'S SIDE**, it's a four- way competition for the top spot between Duke, Kansas, North Carolina and Kentucky. *The below shows week 3 of 53 total weeks. Click play to see the final results.*



**ON THE WOMEN'S SIDE**, it's a three-team race for the top spot between Iowa, UCONN and South Carolina... *The below shows week 3 of 52 total weeks. Click play to see the final results.*

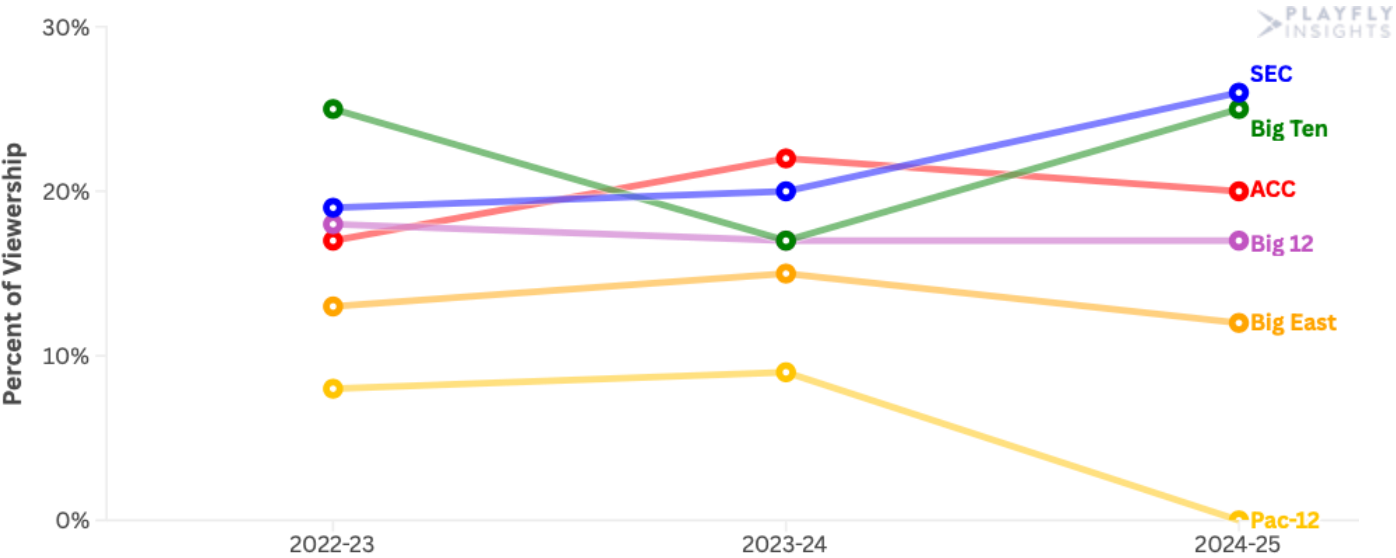


Trends in college basketball conference viewership over the past three seasons highlight key insights into audience engagement and the evolving competitive landscape. *The SEC has risen to the top in both men's and women's basketball*, marking the first time it has led in both divisions.

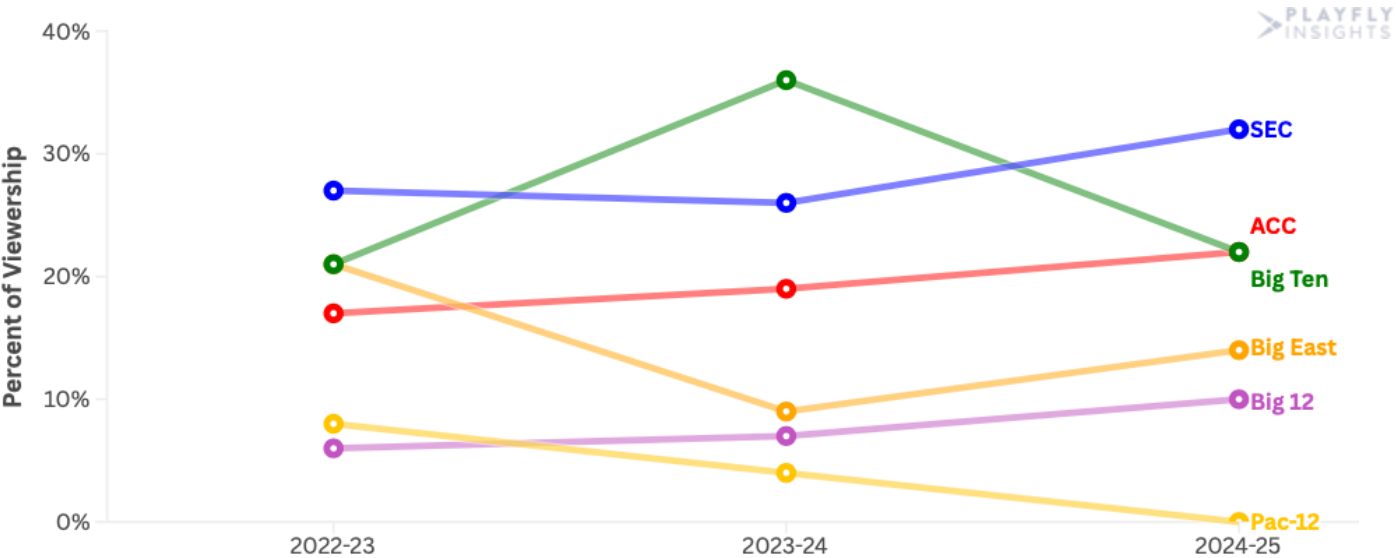
*The SEC made history in 2025 with 14 teams making the 2025 NCAA Tournament*<sup>5</sup>. The previous record for the most teams a conference sent to the NCAA Tournament was 11, set by the Big East in 2011. UConn won the national championship that season.

Among the Top Viewed Conferences

MEN'S COLLEGE BASKETBALL SHARE OF VIEWERSHIP



WOMEN'S COLLEGE BASKETBALL SHARE OF VIEWERSHIP



### 3. Attendance

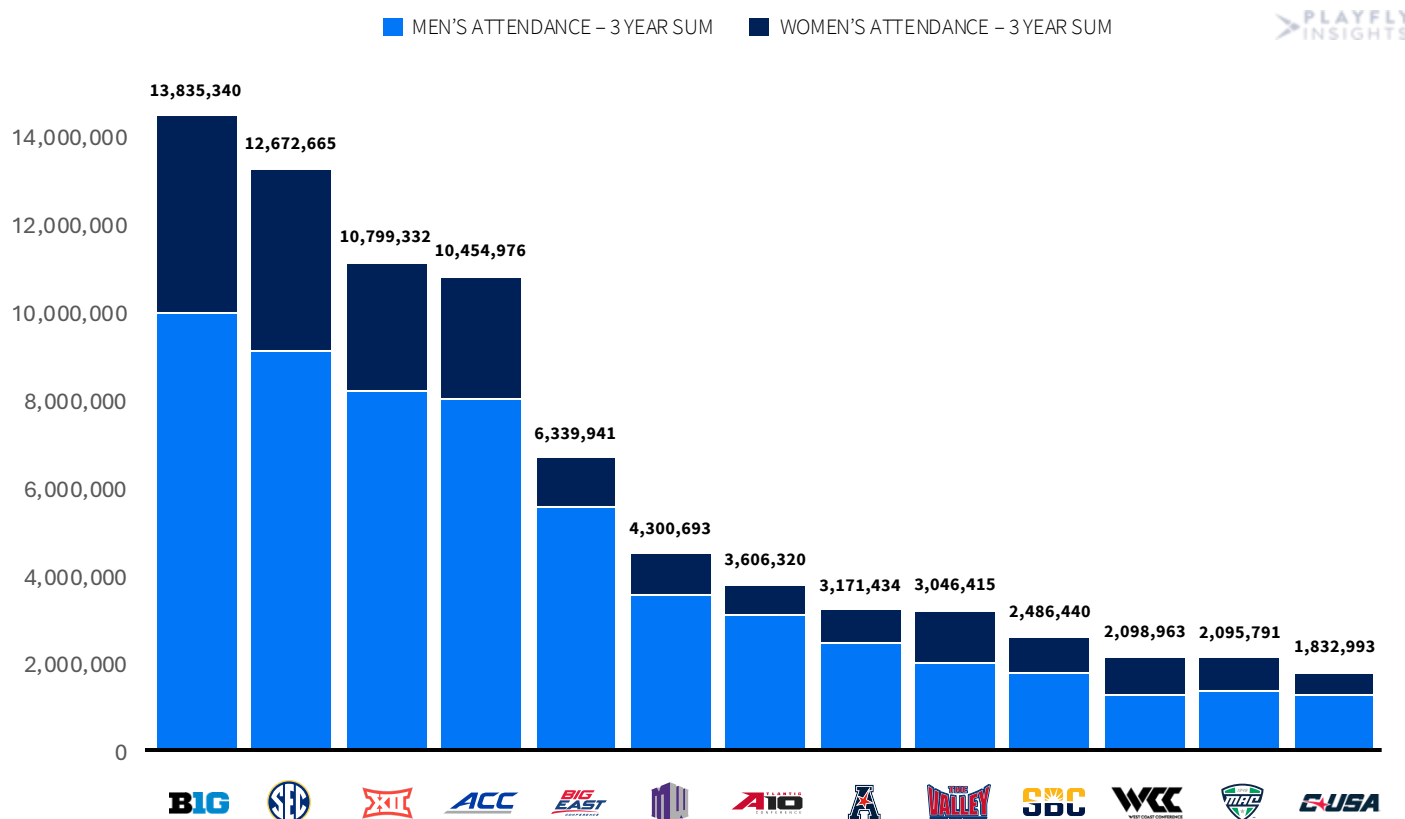
College basketball commands a massive national audience, creating an electrifying atmosphere each season. During the 2023-24 season, *five women's programs and 44 men's programs* consistently filled their home stadiums to at least *90% capacity*<sup>6</sup>, highlighting the sport's passionate fan engagement.

A comparison of total attendance from the 2023-24 season underscores its breadth of popularity—*men's college basketball drew 8% more fans than the NBA, while women's college basketball attracted an astonishing 311% more attendees than the WNBA*<sup>7</sup>.

Total attendance by conference over the past three seasons closely aligns with viewership trends. In both men's and women's college basketball, the *Big Ten and SEC consistently lead in total attendance*, mirroring their dominance in television ratings. Notably, these two conferences also have the highest percentage of total attendance at women's games, underscoring the *growing interest in women's college basketball*.

*Last 3 Completed Seasons (2021/22 – 2023/24)*

#### MEN'S & WOMEN'S ATTENDANCE BY CONFERENCE



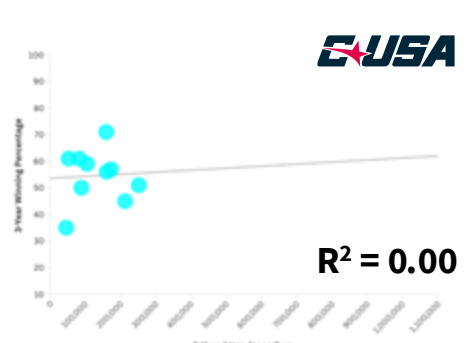
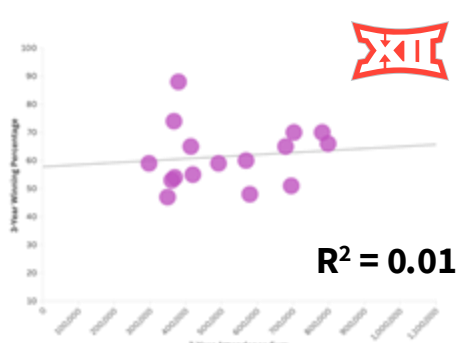
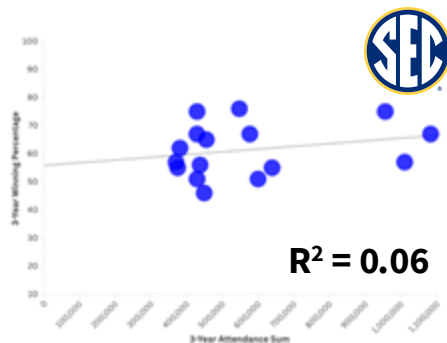
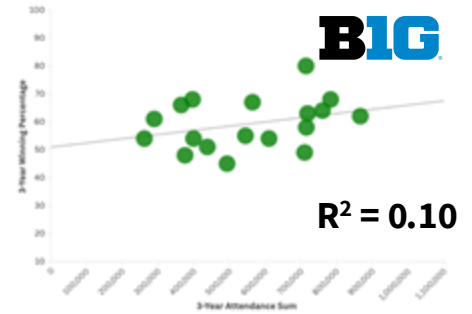
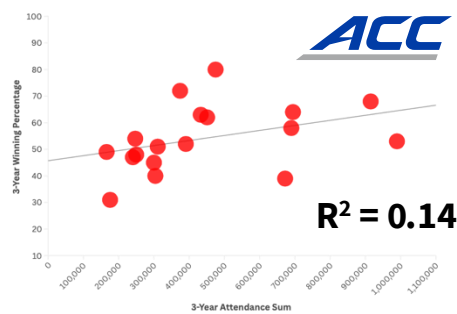
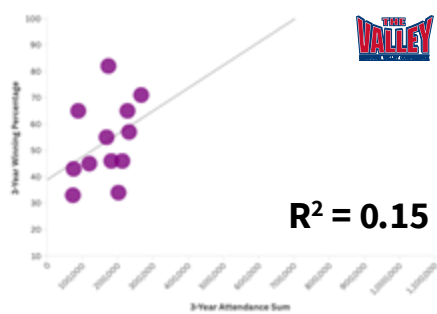
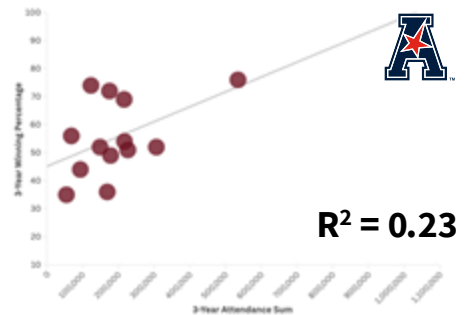
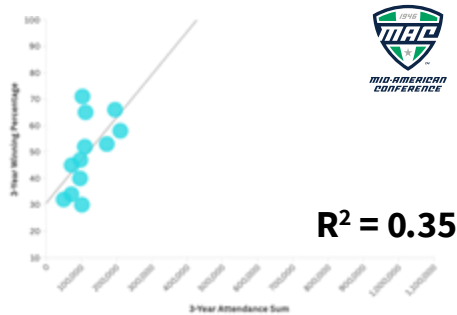
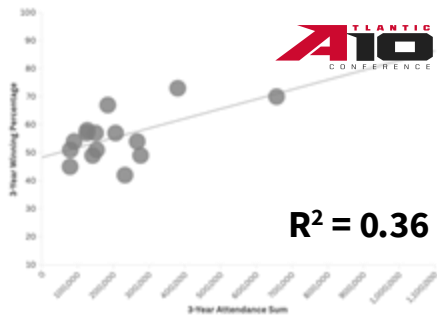
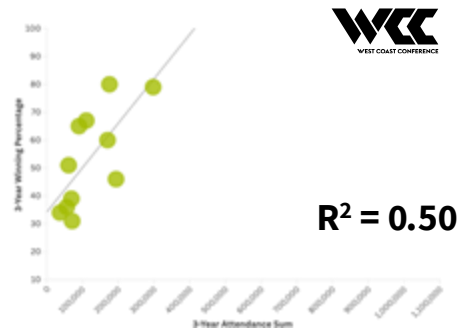
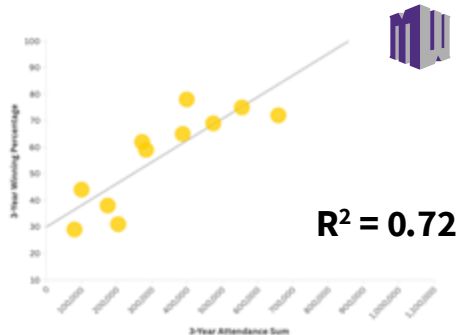
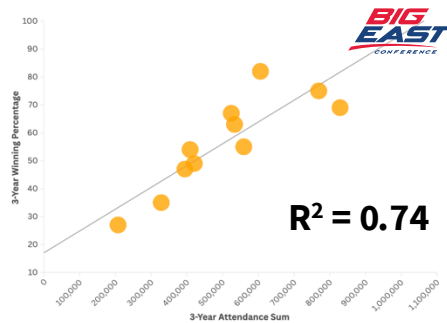


Winning records have a clear impact on attendance in men's college basketball. This effect is even more pronounced in the non-Power 4 conferences, where on-court success can significantly boost fan turnout and engagement.

A higher  $R^2$  indicates that attendance is more influenced by team performance. Conferences with lower  $R^2$  values have more resilient fan bases, who are willing to attend games regardless of whether their team is winning or losing.

### Statistical Analysis

#### W/L RECORD VS. ATTENDANCE BY CONFERENCE: MEN'S

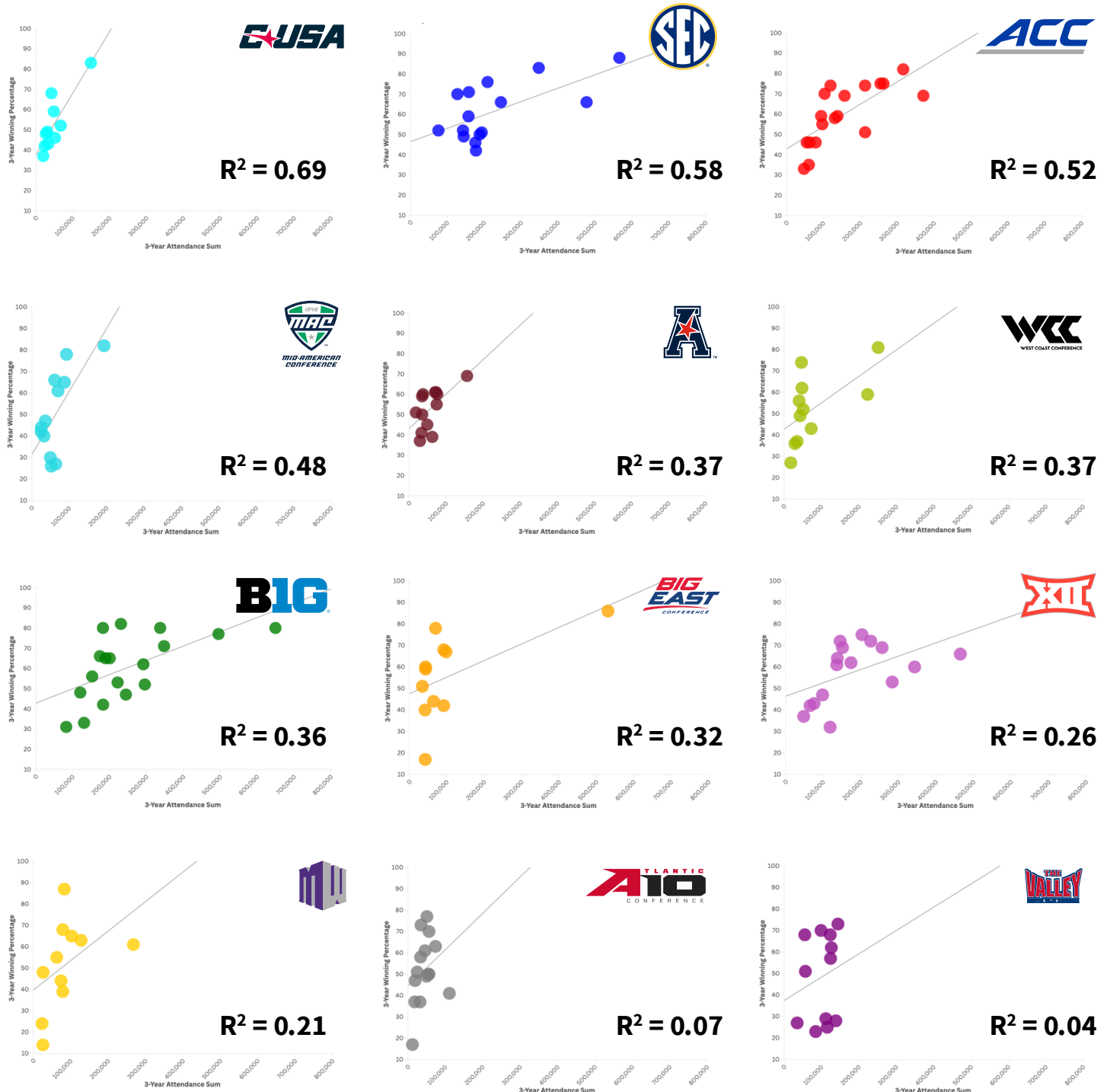


Winning records have an even greater impact on attendance in women's college basketball, as compared with men's.

A higher  $R^2$  indicates that attendance is more influenced by team performance. Conferences with lower  $R^2$  values have more resilient fan bases, who are willing to attend games regardless of whether their team is winning or losing.

## Statistical Analysis

### W/L RECORD VS. ATTENDANCE BY CONFERENCE: WOMEN'S



## 4. Marketing to College BB Fans

### POWER OF THE REGULAR SEASON

March Madness is a cultural phenomenon, drawing massive audiences and captivating both casual and dedicated sports fans. Its win-or-go-home format, Cinderella stories, and high-stakes matchups make it one of the most-watched events in American sports.

However, despite the excitement surrounding March Madness, the majority of college basketball viewership occurs during the regular season. In the **2023-24 men's basketball season, 57% of total viewership** came from regular-season and conference tournament games, compared to **43% from March Madness**. **By contrast**, women's basketball has **March Madness dominating 67% of total viewership**, leaving just **33% for the regular season**.

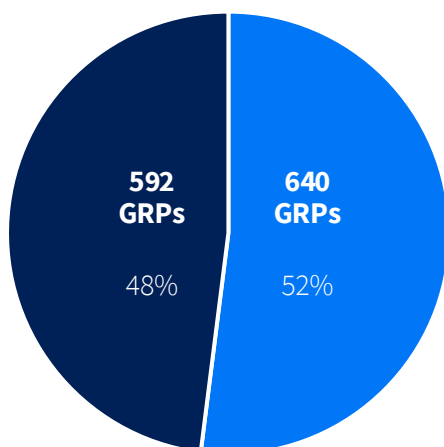
Aggregating both men's and women's college basketball viewership, regular-season and conference tournament games accounted for **52% of all college basketball viewership**, narrowly surpassing the **48% share of March Madness**, underscoring the sustained engagement college basketball generates throughout the season.

Furthermore, marketers appear to **undervalue the impact of regular-season games**. In men's basketball, a staggering **82% of the more than \$2 billion** spent on TV advertising was concentrated within the three weeks of March Madness. A similar pattern emerged in women's basketball, where **78% of the \$150 million** in total ad spending for the season was allocated to the tournament<sup>8</sup>.

#### 2023/24 Season: Men's & Women's Combined

##### P2+ COLLEGE BASKETBALL GRPS

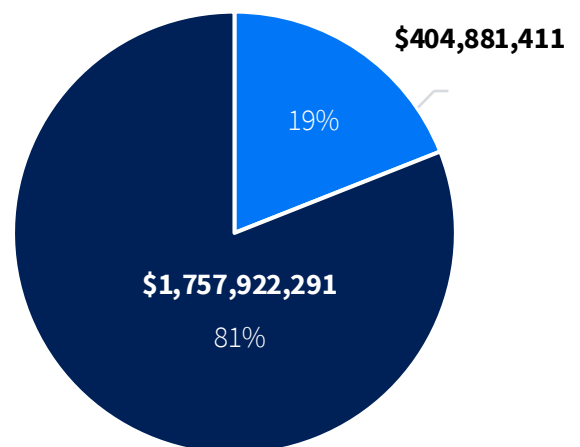
■ REGULAR SEASON + CONFERENCE TOURNAMENTS ■ MARCH MADNESS



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##### ADVERTISER NATIONAL LINEAR AD SPEND

■ REGULAR SEASON + CONFERENCE TOURNAMENTS ■ MARCH MADNESS



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INSIGHTS

### SURPRISING BUT TRUE FACT:

Almost half of March Madness viewers are NOT college basketball fans.

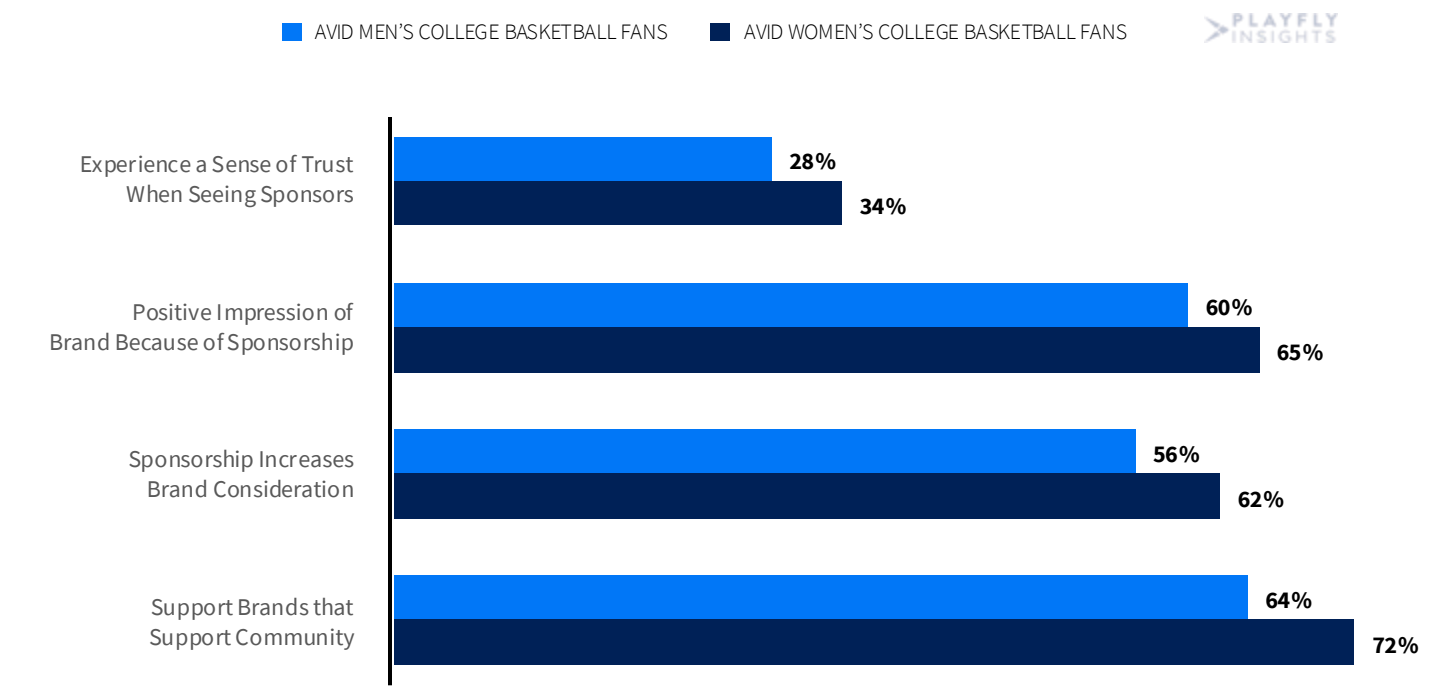
*\*Nielsen viewing data shows that ONLY 55% of March Madness viewers watched ANY college basketball telecasts during the regular season<sup>4</sup>.*

### REACHING THE AVID COLLEGE BASKETBALL FAN THROUGH SPONSORSHIP

Marketers looking to capitalize on college basketball’s passionate and highly engaged fan base should *consider increasing their investment in regular-season broadcasts and direct team sponsorships*. These opportunities target the sport’s most dedicated fans, who follow their teams throughout the season—not just during March Madness.

The current trend underscores the need for a *balanced and diversified approach*, one that values both the *intense excitement of the NCAA Tournament and the strong, sustained engagement of the regular season*. By adopting a more comprehensive promotional strategy, marketers can maximize their reach and impact across the entire college basketball calendar.

The deep emotional connection these fans have with their favorite teams creates a sense of trust when they see brands supporting those programs. This dynamic gives sponsors a valuable opportunity to build brand equity, as the positive feelings fans associate with their team can transfer to the partners who visibly support them. In this way, *sponsorships go beyond simple advertising—they foster meaningful connections that can drive long-term brand loyalty among passionate college basketball audiences*.



## NIL IN WOMEN'S COLLEGE BASKETBALL

The rise of [women's college basketball](#) has captured the attention of Madison Avenue, with star athletes becoming major marketing powerhouses. [LSU's Angel Reese](#) and [Iowa's Caitlin Clark](#) have transcended the sport, becoming household names with high-profile endorsement deals back when they were collegiate athletes.

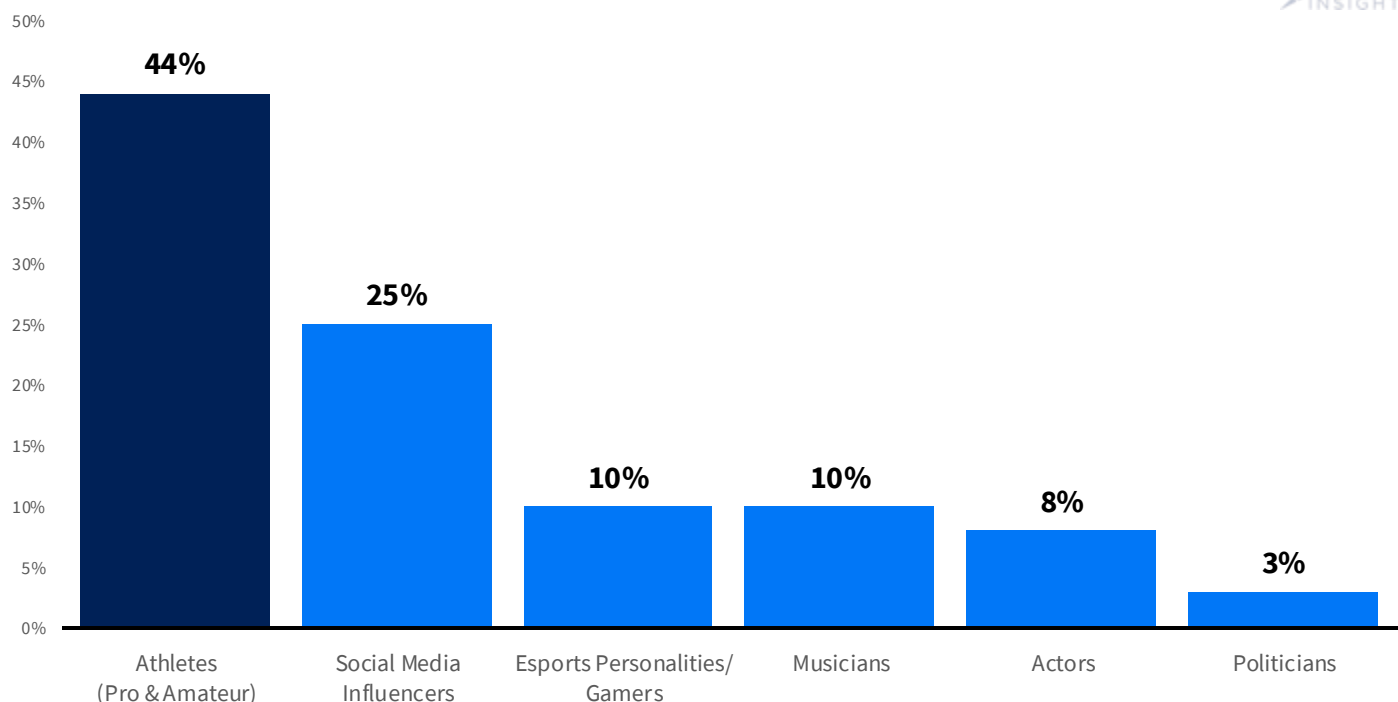
Reese, known as the '[Bayou Barbie](#)', has leveraged her charisma and deep connection with fans to secure partnerships with brands like [Reebok and Coach](#). Meanwhile, Clark's electrifying on-court performances have made her one of the most sought-after endorsers, landing deals with [Gatorade, Nike, State Farm, and more](#), solidifying her status as a premier ambassador for women's sports.

College basketball fans look to athletes and social media influencers for brand recommendations, and women's college basketball NIL partnerships are a prime example of bringing those together, as the stars are influencers both on and off the court. [College basketball fans are also 2x more likely to trust female influencers than male influencers](#)<sup>3</sup>.

Players are using their platforms to connect with fans through social media, collaborating with local businesses, national brands, and nonprofit organizations. They bring to the table a large online presence, with the [top players having a larger social media presence than the accounts of the teams they play for](#).

When Looking for Brand Recommendations:

### COLLEGE BASKETBALL FANS TRUST





The top 6 women’s basketball players according to ON3’s NIL rankings have double to nearly 20x the social media following of their women’s basketball team accounts<sup>9</sup>.

**ON3’S 2025 COLLEGE WOMEN’S BASKETBALL NIL RANKINGS:**

		ON3’S NIL VALUATION	PLAYER SOCIAL MEDIA FOLLOWING	WBB TEAM SOCIA MEDIA FOLLOWING
	Flau’jae Johnson	\$1.5 Million	2.14M	472K
	Paige Bueckers	\$1.4 Million	2.29M	974K
	Haley Cavinder	\$889,000	1.04M	67K
	Hanna Cavinder	\$863,000	1.03M	67K
	Hailey Van Lith	\$779,000	1.31M	63K
	JuJu Watkins	\$576,000	1M	100K



**FINALLY – WOMEN RECEIVE “UNITS” FOR MARCH MADNESS PARTICIPATION**

The 2025 Division I Women’s Basketball Tournament will implement a version of the “units” system that has long been in place for the men’s tournament. *The initial prize pool will start at \$15 million for the 2025 tournament, increasing to \$20 million in 2026 and \$25 million in 2027.*

Although the total prize pool is significantly lower than the men’s (\$226 million in 2024), it represents roughly the same percentage of the women’s tournament media deal, which is valued at \$870 million annually. The value of the prize pool is also set to increase by 2.9% each year, in line with standard NCAA practices<sup>10</sup>. *This long-awaited move is a major milestone for women’s college basketball, signaling progress toward greater equity and investment in the sport’s continued growth.*



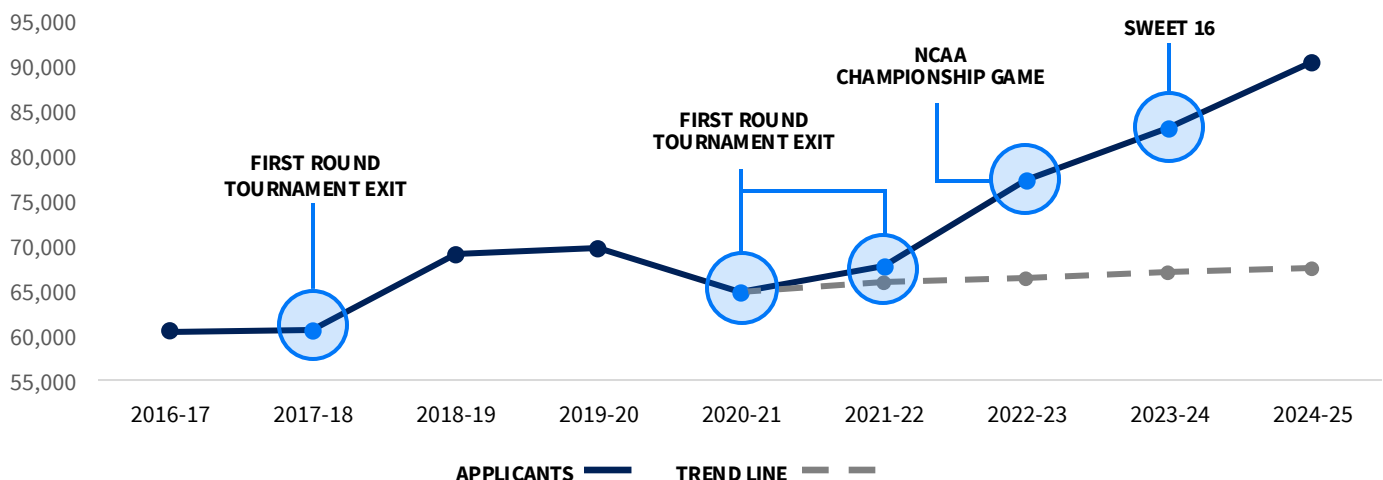
## 5. On Court Success Drives Enrollment

Success on the court not only leads to more national TV appearances, but also enhances a university's visibility, often driving an increase in enrollment. Universities with strong basketball programs frequently experience a surge in applications, a phenomenon known as the *"Flutie Effect"* — named after quarterback Doug Flutie's legendary 1984 performance, which led to a spike in *Boston College* applications.

In college basketball, *deep tournament runs, and high-profile regular-season performances* can significantly elevate a university's national profile, attracting more prospective students and strengthening the school's overall brand.



SAN DIEGO STATE APPLICANTS BY SCHOOL YEAR



## 6. The CBB Fanscore Rankings

*The Playfly Fan Score is the first actionable and insightful sports ranking index geared to marketers and sports business leaders.* It is a fresh perspective to understanding fan value based on Playfly proprietary factors. Rankings shouldn't be up for debate when it comes to business analytics. As such, we partnered with Vision Insights, leaders in sports sponsorship measurement, to develop a custom algorithm to quantify fandom and sponsor performance.

### HOW WE TALLY THE SCORE:

The Playfly Fan Score is a comprehensive metric that integrates various factors, including fandom engagement, team performance, and sponsorship impact. The college basketball fan score specifically combines data from the 2024-25 season with the average performance of the previous three seasons, alongside sponsorship and fandom insights derived from Vision Insights Decoder. *Factors such as fan base size, viewership, attendance, and sponsorship recognition contribute* to the final score for each men's and women's team.

#### MEN'S TEAM & RANK

1	Kentucky	
2	North Carolina	
3	Duke	
4	UConn	
5	Indiana	
6	Kansas	
7	Arizona	
8	UCLA	
9	Florida	
10	Tennessee	
11	Illinois	
12	Michigan State	
13	Houston	
14	Villanova	
15	Alabama	
16	Marquette	
17	Texas	
18	Texas A&M	
19	Purdue	
20	Arkansas	

#### WOMEN'S TEAM & RANK

1	UConn	
2	South Carolina	
3	LSU	
4	Texas	
5	Tennessee	
6	Notre Dame	
7	USC	
8	NC State	
9	Baylor	
10	Ohio State	
11	North Carolina	
12	Stanford	
13	Louisville	
14	Virginia Tech	
15	Maryland	
16	Iowa	
17	Indiana	
18	UCLA	
19	Iowa State	
20	Kansas State	

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# MEET OUR BUSINESS LEADERS



**CRAIG SLOAN**

CEO of Playfly Sports  
Email: [craig.sloan@playfly.com](mailto:craig.sloan@playfly.com)



**CHRISTY HEDGPETH**

President of Playfly Sports Properties  
Email: [christy.b.hedgpeth@playfly.com](mailto:christy.b.hedgpeth@playfly.com)



**GREGG LIEBMAN**

SVP of Playfly Insights  
Email: [gregg.liebman@playfly.com](mailto:gregg.liebman@playfly.com)



Playfly Sports, the sports industry's leading revenue maximization company drives growth for its partners across the sports ecosystem – including 2,000+ brands, 100+ professional teams, 65+ college athletic departments, all U.S. local sports networks and associated streaming platforms, and other marquee properties. The company uses its comprehensive and proprietary fan engagement platform to help its partners reach and engage over 85% of all U.S sports fans. Playfly builds and implements custom strategies across media, sponsorship and experiential for each of its partners by utilizing its own proprietary data, technology and storytelling.

Playfly operates an expansive portfolio of services with a data-driven and fan-focused approach to maximize revenue yield in key growth areas, such as media, sponsorship, ticketing, premium experiences and fan engagement offerings. Founded in September of 2020, Playfly Sports is now home to approximately 1,000 team members located across 43 U.S. states and internationally dedicated to maximizing the impact of highly passionate local sports fans. The company has been named a Best Place To Work In Sports by Sports Business Journal, Front Office Sports, and Newsweek.

To learn more, follow Playfly Sports on social media platforms or visit [www.Playfly.com](http://www.Playfly.com).