

# BEYOND THE BLUE BLOODS

Why the CFP Final Marked a Turning Point for College Football, Media, and Brand Investment



# COLLEGE FOOTBALL, REBUILT

## How the CFP Final Proved the Sport Is Now Built for Scale

The 2026 College Football Playoff National Championship delivered more than 30 million viewers across ESPN platforms, making it the most-watched non-NFL sporting event since 2016 and a 36 percent increase year over year.

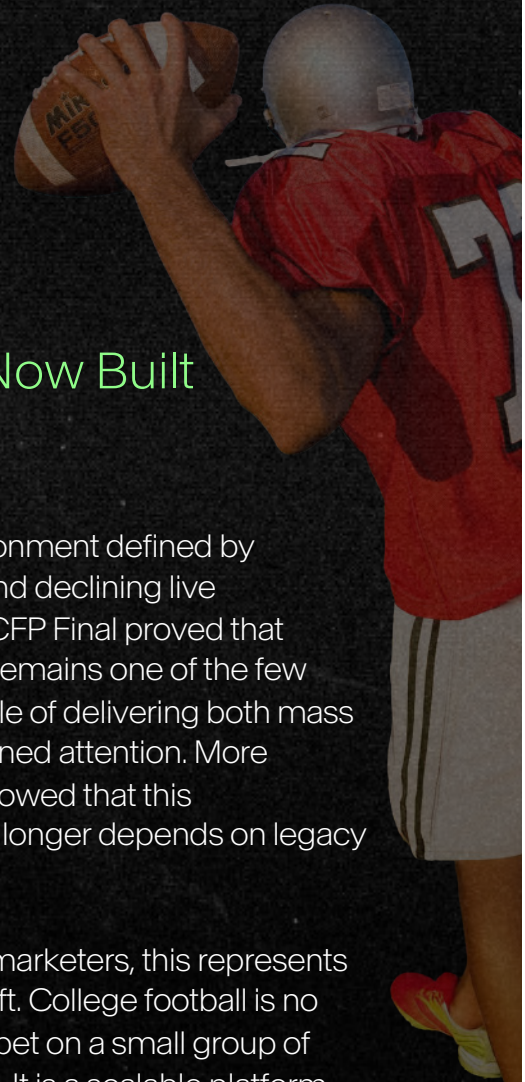
On the surface, the matchup itself looked unconventional. Two programs outside the usual group of college football powerhouses reached the sport's biggest stage. In past eras, that might have raised concerns about reach or relevance. Instead, the opposite happened.

This was not simply the result of an underdog story catching fire. It was the outcome of a sport that has been fundamentally rebuilt. Expanded playoff access, revenue sharing, the maturation of NIL, and more business oriented athletic operations have reshaped how college football functions at the top. The system now supports competitive balance, sustained fan engagement, and the emergence of new narratives at scale.

In a media environment defined by fragmentation and declining live viewership, the CFP Final proved that college football remains one of the few platforms capable of delivering both mass reach and sustained attention. More importantly, it showed that this performance no longer depends on legacy programs alone.

For brands and marketers, this represents a meaningful shift. College football is no longer a narrow bet on a small group of dominant teams. It is a scalable platform designed to generate momentum across a broader set of programs, athletes, and fan bases. The opportunity is expanding earlier in the season, deeper into the playoffs, and across a wider range of brand entry points.

The CFP Final did not just crown a champion. It confirmed that the sport has entered a new phase, one built to grow, adapt, and deliver value well beyond a single game.



# THE VIEWERSHIP

## Mass Reach, Broader Appeal, Sustained Attention

The expanded playoff format has changed fan behavior by keeping more programs and fan bases invested deeper into the season. That broader engagement now carries into the championship moment, even when familiar brands are absent.

What matters most in the data is not just audience size, but audience quality. The CFP Final attracted a broader mix of viewers and sustained attention across the full broadcast, rather than relying on short-lived peaks.

# 30.1 MM

Total Viewers  
Averaged Across  
ESPN Networks

# +36%

Viewership surpassed  
last year's previous  
record coverage

# THE VIEWERSHIP

Mass Reach, Broader Appeal, Sustained Attention

## FEMALE / MALE SKEW

■ FEMALES 2+ ■ MALES 2+



## AGE BREAK SKEW

■ V2-17 ■ A18-34 ■ A35-54 ■ A55+



- While ESPN's coverage of the CFP Championship skews heavily Male, Women accounted for almost 40% of the viewership (+7% YoY)
- A55+ accounted for over half of the Total Viewers, up 10% YoY

ESPN  
**28.8**  
MILLION

ESPN 2  
**1.2**  
MILLION

ESPN DEPORTES  
**124K**

PLATFORM CONTRIBUTION	
Traditional TV / Set Top Box	54 %
Smart TV	24 %
Internet Connect Device	19 %
Video Game Console / DVD	2 %
Digital	2 %

The CFP Championship saw gains across all key demos. While viewership peaked during the 8:30PM half hour, the game delivered consistent viewership thru all 4 quarters – a win for advertisers across the full telecast

TOTAL VIEWERS (000)		
7:52 PM	7:59 PM	25,164
8:00 PM	8:29 PM	28,926
<b>8:30 PM</b>	<b>8:59 PM</b>	<b>31,222</b>
9:00 PM	9:29 PM	28,935
9:30 PM	9:59 PM	27,837
10:00 PM	10:29 PM	28,983
10:30 PM	10:59 PM	28,568
11:00 PM	11:21 PM	27,699

Traditional TV/Set top box still accounts for the majority eyeballs tuning to ESPN's coverage, with 54% of the total audience viewing the game through this outlet. 24% viewed via a Smart TV and 19% via an Internet Connected Device

While tune in via connected TV and devices are significantly increasing, viewing through the TV glass is still the preferred method for marquee broadcast events

Source: Havas analysis of Nielsen, Live + Same Day Big Data + Panel; [ESPN Press Release](#)

In a fragmented media environment, this level of consistent live viewership is increasingly rare. The CFP Final shows that when competition and stakes are designed correctly, mass attention is still achievable.

# SPONSORS AND RETURNS

## Relevance Is Driving Sponsorship Value

The CFP Final made clear that sponsorship value is no longer driven by volume of assets, but by relevance within the game environment. In a cleaner broadcast setting, brands that were integrated into the experience itself consistently outperformed those relying on perimeter visibility.



Both teams used **Adidas** uniforms leading to 35 minutes on screen



Stadium sponsor **Hard Rock's** roof logos drove a 29.37 CS score



**Gatorade's** utility led to significant time on screen and overall value

## CENTERSTAGE

BRAND	CENTERSTAGE SCORE	MINUTES ON SCREEN	SPONSORSHIP VALUE
AT&T	16.98	105.00	\$23.5M
<b>Adidas</b>	<b>16.01</b>	<b>35.02</b>	<b>\$7.4M</b>
<b>Hard Rock</b>	<b>29.37</b>	<b>7.63</b>	<b>\$2.9M</b>
<b>Gatorade</b>	<b>18.29</b>	<b>6.48</b>	<b>\$1.5M</b>
Mercedes	28.43	3.07	\$1.2M
Allstate	43.94	1.93	\$1.1M
Nike	12.25	3.95	\$0.6M
Goodyear	51.66	0.42	\$0.3M
Dr Pepper	36.57	0.35	\$0.2M

### Havas Play's CenterStage tool identifies which brands showed up best in the actual game itself, quantifying returns on these marquee sponsorships:

- **AT&T**, the title sponsor of the game, received far and away the most exposure, reaching more than \$23M in Equivalent Media Value
- **Adidas** sponsored both teams and as a result dominated all apparel brands with **\$7.4M** in sponsorship value, with only **Nike** breaking the **\$500K** mark otherwise
- **Hard Rock** saw more than 7 minutes of exposure, despite many of their field level assets being covered up by the clean CFP environment
- **Gatorade's** highly relevant product placements paid off huge, with over **\$1.5M** in exposure
- Other CFP sponsors **Mercedes, Allstate, Goodyear and Dr Pepper** had brief exposures via different sponsorship formats

# SPONSORS AND RETURNS

## Relevance Is Driving Sponsorship Value

### KEY OBSERVATIONS:

- Title sponsorship delivered the highest overall exposure and media value
- Apparel sponsorship benefitted disproportionately when brands aligned with both teams
- Utility-driven integrations outperformed static signage on a value-per-second basis
- Clean broadcast environments increased the impact of every brand moment that appeared

What stood out was efficiency of exposure. With fewer assets competing for attention, brands embedded into gameplay, routines, or infrastructure delivered stronger returns than traditional logo placement.

This signals a broader shift in sports marketing. The most effective partnerships are built around how fans experience the sport, not how many logos appear on screen.



# HOW BRANDS WIN IN COLLEGE FOOTBALL'S REBUILT ERA

College football now trails only the NFL as the largest reach opportunity in US sports. As the business model for programs evolves, the way brands show up must evolve with it. What worked five years ago is no longer enough. Here is how brands win in the current college football landscape.



HAVAS Play

## 01

### **Invest in the System, Not Just the Favorites**

The CFP Final reinforced that national reach is no longer limited to perennial power programs. Expanded playoffs, revenue sharing, and NIL have created a more competitive field. Brands can now find scale by backing momentum and leadership, not just history.

## 02

### **Treat Revenue Sharing as a Strategic Entry Point**

We are firmly in the revenue share era. Programs are sharing team revenues directly with players, and the most competitive schools are operating like professional organizations. Sponsors are not peripheral. They are part of how teams fund competitiveness and growth.

## 03

### **Use NIL to Capture Value at Peak Visibility**

Student athletes who reach the National Championship stage are thrust into the national spotlight, accelerating their marketability overnight. NIL is most effective when it amplifies team sponsorship and media exposure, rather than functioning as a standalone endorsement play.

## 04

### **Design Around New Sponsorable Assets**

On-field branding, uniform patches, and deeper access to players are expanding the sponsorship toolkit. These assets create both media value and earned impact, allowing brands to integrate into the game environment rather than sit outside it.

## 05

### **Extend Beyond Football**

As football programs scale, momentum carries across the broader college sports ecosystem. Baseball, softball, volleyball, and golf are seeing audience growth as the overall stage expands. For brands, this creates efficient entry points with highly engaged fan bases and lower cost of entry.

# HAVAS Play

We help brands play meaningfully in culture.

To explore how these shifts can translate into real brand opportunities, contact us at [havasplayNA@havasmedia.com](mailto:havasplayNA@havasmedia.com)

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