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## News Release

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### THE NIELSEN COMPANY'S GUIDE TO THE 2009 NCAA BASKETBALL TOURNAMENT

NEW YORK, NY March, 16, 2009 – The Nielsen Company today released its first annual Guide to March Madness, which showcases a full range of consumer and media information surrounding one of the most celebrated sporting events in America – the NCAA Tournament. This year's Final Four takes place April 4-6 at Ford Field in Detroit, MI.

Among the key findings from Nielsen:

**Television:** The 2008 NCAA tournament reached a total of 136.8 million TV viewers. Louisville delivered the highest-rated local market over the last five years. African-American households are more drawn to the tournament compared to the national composite.

**Advertising:** TV ad revenue generated by the tournament has climbed 34% over the last five years. General Motors was the biggest advertiser during each of the last five tournaments. The cost of a 30-second commercial in last year's championship game cost over \$1 million.

**Online:** ESPN and Yahoo! were the two most-visited sports sites last March with 19.8 and 19.4 million unique users, respectively. Traffic on the CBS Sports web brand shot up 59 percent in March 2008 over the previous month. Online buzz spiked dramatically in March for last year's Cinderella team, Davidson College.

**Demographics:** According to Scarborough Sports Marketing, a joint venture between Nielsen and Arbitron, NCAA men's tournament fans enjoy a variety of outdoor activities, especially gardening. They are also above-average consumers of automotives, financial services, beer, and fast food.

The Nielsen Company will be monitoring media and viewer behavior throughout this year's NCAA tournament. Data and insights will be added and updated after each round on the Nielsen Wire at <http://blog.nielsen.com/nielsenwire/>.

#### **TELEVISION**

Last year, 136.8 million unique TV viewers tuned in to at least one minute of NCAA Tournament coverage on CBS. As the tournament progressed, an increasing amount of households tuned in to the games. During the first round of tournament coverage, 24.6 million households watched at least a portion of the games. By the time Kansas emerged as the Final Four champion, 56 million had caught a few minutes of at least one March Madness game.



The most-watched NCAA championship game ever was in 1979, when an average 35.1 million viewers watched Magic Johnson and Michigan State defeat Larry Bird and Indiana State. The second, third, and fourth most-watched championship games were played in 1992-94. Each of those matchups featured highly-touted squads from the University of Michigan and/or Duke University

Nielsen found that the Louisville market generates the highest average household tournament ratings in America. Over the last five NCAA Tournaments, Louisville averaged a 19.0 rating, a full six points higher than the college hoops Mecca of Raleigh-Durham (13.0 rating). Memphis, Cincinnati, and Columbus, OH round out the top-5.

The tournament holds a particular appeal with African-Americans. Since 2004, African-American households had a 28% higher rating for March Madness games than the national composite. Ratings for last year's tournament were 35% higher in African-American homes compared to the national average.

<b>Most Avg. Viewers, NCAA Championship Game (millions)</b>	
1979	– Mich St. vs. Ind. St. – 35.1
1992	– Duke vs. Michigan – 34.3
1993	– UNC vs. Michigan – 32.9
1994	– Arkansas vs Duke – 32.7
1983	– NC St. vs. Houston – 32.1
<b>Top Local Market Rating, NCAA Tournament 5-year Avg.</b>	
Louisville	– 19.0%
Raleigh-Durham	– 13.0%
Memphis	– 12.9%
Cincinnati	– 12.9%
Columbus	– 12.7%

**ADVERTISING**

Ad buys for CBS's TV coverage of the NCAA Tournament have risen steadily in the last five years, from \$434 million in 2004 to \$580 million in 2008 – a surge of almost 34%.

Similarly, spending for the NCAA Final Four Championship Game has climbed 47% over the last five years. Last year's final game saw \$97.5 million in total advertising spending, with the cost of a 30-second commercial over \$1 million.

<b>CBS NCAA Basketball Championship Final Game</b>		
<b>Year</b>	<b>Network TV (\$ millions)</b>	<b>Cost of 30-second Commercial</b>
2004	\$ 66.3	\$766,893
2005	\$ 70.5	\$846,427
2006	\$80.6	\$915,402
2007	\$86.9	\$1,034,190
2008	\$97.5	\$1,060,174

Source: The Nielsen Company

The top 10 advertisers of the NCAA Tournament spent \$245.9 million in 2008. General Motors spent the most on commercials in each of the last five years, for a total of \$317 million. The auto giant's spending has declined since 2006, when it peaked at \$67 million. Nike and Toyota were new additions to the top 10 list in 2008.



<b>Top 10 Advertisers 2008 NCAA Games</b>	<b>\$ mil</b>
General Motors Corp.	\$ 64.7
AT&T Inc.	\$ 36.5
National Collegiate Athletic Association	\$ 24.1
Coca-Cola Co.	\$ 23.2
U.S. Government	\$ 21.7
Stichting Inbev	\$ 17.4
Nike Inc.	\$ 17.0
SAB Miller Plc	\$ 16.2
Lowe's Cos. Inc.	\$ 13.7
Toyota Motor Corp.	\$ 11.5
<b>Total Top 10 Advertisers</b>	<b>\$ 245.9</b>

*Source: The Nielsen Company*

The Automotive category was the top-spending category for each of the last five years. Its spending has fluctuated, reaching \$101.3 million in 2006, dropping to \$86.3 million, and climbing back to \$99 million last year.

<b>Year</b>	<b>Automotive Spending NCAA Games (\$ mil)</b>
2004	\$ 82.7
2005	\$ 89.9
2006	\$ 101.3
2007	\$ 86.3
2008	\$ 99.0

*Source: The Nielsen Company*

Spending for the top categories ranged from \$100,000 for Mouthwashes, to almost \$100 million for Automotive. As the top-ranked category, Automotive spent more than double that of the second-ranked category, Financial-Investment Services.

<b>Top Product Categories 2008 NCAA Games</b>	<b>\$ mil</b>
Automotive	\$ 99.0
Financial-Investment Services	\$ 40.8
Quick Service Restaurant	\$ 37.8
Wireless Telephone Services	\$ 35.7
Beer	\$ 32.2
Sporting Footwear	\$ 22.6
Insurance	\$ 20.4
Regular & Diet Soft Drinks	\$ 19.4
Restaurant	\$ 16.2
Military Recruitment	\$ 16.2

*Source: The Nielsen Co.*



**ONLINE**

Basketball fans look forward to March Madness all year, and so do the Web sites that cater to their increased media appetites. In March 2008, ESPN ranked No. 1 in the sports category with 19.8 million unique visitors, followed closely by Yahoo! Sports with 19.4 million. March Madness hub CBS Sports ranked No. 3 in the category with 15.1 million unique visitors and saw the largest month-over-month increase in traffic among the top three sports sites, growing 59 percent from February to March.

ESPN saw an 11 percent bump in the same time period while Yahoo! Sports increased 1 percent.

**Top 3 Sports Sites for March 2008 (U.S., Home and Work)**

Site	Feb-08 UA (000)	March-08 UA (000)	% Change
ESPN	17,817	19,844	11%
Yahoo! Sports	19,146	19,432	1%
CBS Sports	9,478	15,106	59%

*Source: The Nielsen Company*

CBS Sports' surge was even more pronounced by users logging on from work, where the brand's visitors increased 82 percent month-over-month, compared to 5 percent and 6 percent for ESPN and Yahoo! Sports, respectively.

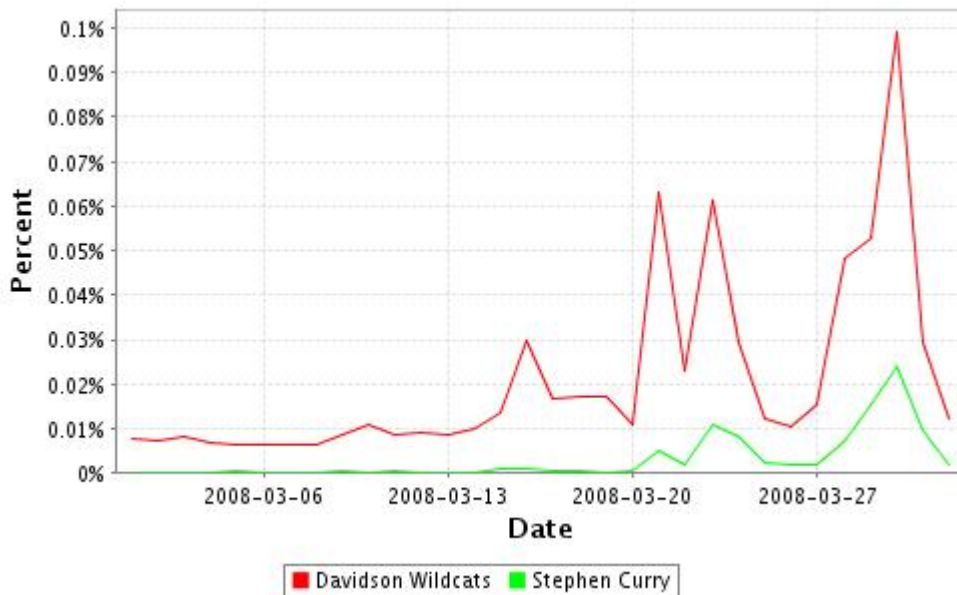
Part of CBS Sports' lift in March is due to increased overlap with the larger audiences of ESPN and Yahoo! Sports. In February 2008, 24 percent of ESPN's audience and 21 percent of Yahoo! Sports audience also visited CBS Sports. In March, the overlap increased to 34 percent and 31 percent for ESPN and Yahoo! Sports, respectively.

**Percent of Audience Overlap with CBS Sports**

Site	Feb-08	Mar-08
ESPN	24%	34%
Yahoo! Sports	21%	31%

*Source: The Nielsen Company*

One of the biggest appeals of March Madness is that any team can catch fire, thrusting schools and players out of obscurity and creating buzz among college hoops fans across the country. Last year's "Cinderella" team was Davidson College. The Nielsen Company conducted an analysis of the online buzz surrounding Davidson by tracking references to the university and its star player, Stephen Curry, on Internet message boards.



Davidson's popularity first spiked on March 21, 2008, after it beat Gonzaga 82-79. Curry dominated the game with 40 points, driving buzz about the team and his exceptional performance. Buzz spiked again on March 23<sup>rd</sup> when the Wildcats upset Georgetown, and then soared in anticipation of the Davidson vs. Kansas game. Although Davidson lost to Kansas, fans praised Curry for his efforts.

**DEMOGRAPHICS**

According to Scarborough Sports Marketing, a joint venture between Nielsen and Arbitron, NCAA Men's Tournament fans (defined as adults who watched the NCAA Men's Tournament on broadcast television or listened to it on the radio during the past year) are more likely to be male, educated, and married. They have higher than average annual household incomes, and the tournament appeals to adults across all age groups. Scarborough found that NCAA tournament fans also have a wide range of interests, hobbies, and consumer preferences:

- In their free time, NCAA tournament fans enjoy participating in outdoor sports like swimming, golf, and fishing. But the top personal activity for March Madness fans is gardening. Forty-eight percent of NCAA fans surveyed reported that they engaged in gardening activities within the last 12 months.

Leisure activities enjoyed by NCAA Tournament fans in last 12 months	National %	NCAA Fans %	Index
Gardening	46%	48%	105
Swimming	32%	40%	123
Volunteer Work	27%	33%	121
Golf	13%	29%	231
Fishing	21%	29%	136

Source: Scarborough Sports Marketing, a joint venture between The Nielsen Company and Arbitron, Inc.  
 How to Read: 13% of all U.S. adults golfed in the last 7 days. 29% of NCAA Men's Tournament fans golfed over the same period. NCAA Tournament fans were 131% more likely to golf within the last 7 days

- NCAA tournament fans are 10% more likely to have visited a casino within the last year, and 26% more likely than the average adult to have visited Las Vegas in the last year.



- Tournament fans are 17% more likely than the average adult to own three or more vehicles in their household. They account for more than one-quarter (26%) of all adults planning to buy or lease a new SUV during the next year.
- Men's Tournament fans are more likely to use all types of financial services in their household - from checking and savings accounts, to mortgage refinancing and 401k plans. They are 40% more likely to hold stocks or stock options than the average American, and 67% more likely to invest or trade stocks online.
- NCAA Men's Tournament Fans are avid fast food consumers. They are 34% more likely than the average adult to have frequented a fast food joint ten or more times during the past week. Their fast food destinations of choice are McDonald's, Subway, Burger King, and Wendy's.

Fast food restaurants enjoyed by NCAA Tournament fans in last 7 days	National %	NCAA Fans %	Index
McDonald's	24%	28%	117
Subway	10%	12%	125
Burger King	10%	12%	115
Wendy's	9%	12%	130
Taco Bell	9%	10%	114

*Source: Scarborough Sports Marketing, a joint venture between The Nielsen Company and Arbitron, Inc.*  
How to Read: 24% of all U.S. adults ate McDonald's in the last 7 days. 28% of NCAA Men's Tournament fans ate at McDonald's over the same period. NCAA Tournament fans were 17% more likely to eat at McDonald's within the last 7 days.

- NCAA Men's Tournament fans enjoy beer - they are 33% more likely than other adults to have consumed any beer during the past month. Bud Lite (in the light domestic category), Budweiser (regular domestic) and Corona (imported) are three leading beer brands for these fans.

### **About The Nielsen Company**

The Nielsen Company is a global information and media company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence, mobile measurement, trade shows and business publications (Billboard, The Hollywood Reporter, Adweek). The privately held company is active in approximately 100 countries, with headquarters in New York, USA. For more information, please visit, [www.nielsen.com](http://www.nielsen.com).