

MARCH MADNESS SCORES BIG WITH BRACKET PLAYERS



THE STUDY DETAILS

GOAL: Quantify the relationship between participating in brackets for March Madness and watching games on television

CHANNEL: NCAA Men's Basketball Tournament; Online Bracket Sites and Mobile Apps

SUMMARY: Nielsen analyzed viewership of the 2015 NCAA Men's Basketball Tournament by leveraging TV/Digital Fusion, which uses Nielsen's behavioral panels (National TV Panel and Online/Mobile Panels). Nielsen segmented bracket/fantasy gamers and then crossed those segments with TV viewership of the 2015 NCAA Tournament. Their viewership was then compared to non-bracket/fantasy gamers and the general population.

RESULTS: The AGA were able to determine that consumers who use online sites and apps to play March Madness brackets watched more of the games on television, watched for longer, were overall more engaged and therefore more valuable to the league and its advertisers.

MEASURING NCAA ENGAGEMENT OF BRACKET PLAYERS

When it comes to the NCAA Men's Basketball Tournament, more people are filling out brackets than ever before. According to the American Gaming Association (AGA), 40 million people filled out approximately 70 million brackets last year, and waged \$9.2 billion on March Madness through office pools, Nevada sports books, offshore sites and bookmakers. The AGA knew that people who fill out brackets, either online at a fantasy sports site or via a mobile app, would watch more of the NCAA Tournament on linear television than those who don't. To prove this hypothesis and better understand the relationship between participating with brackets and engagement, they turned to the Sports group at Nielsen.

Nielsen's analysis showed that fans who participate in a brackets pool through an online site or mobile app meant watched more of the tournament on television, particularly the early rounds. In fact, the research found that bracket players viewed 20% more games than non-players during the 2015 NCAA Tournament and spent 21% more minutes watching games than people who didn't participate. The AGA were able to make the point that because fans who visit bracket sites or apps were more engaged, they provided extra value to the league and its advertisers.

WHAT DID THE STUDY TELL US?

The 2015 NCAA Men's Basketball Tournament reached a **larger concentration** of Bracket/Fantasy Gamers compared to the Total Population; this was consistent across each round of the tournament.

KEY FINDINGS



BRACKET PLAYERS SPENT **21% MORE** MINUTES WATCHING GAMES THAN NON-PLAYERS.



BRACKET PLAYERS WATCHED **20% MORE NCAA TOURNAMENT** GAMES THAN NON-PLAYERS.



MOBILE BRACKET PLAYERS WERE THE MOST AVID VIEWERS, AVERAGING **36% MORE MINUTES** WATCHING THE TOTAL TOURNAMENT.

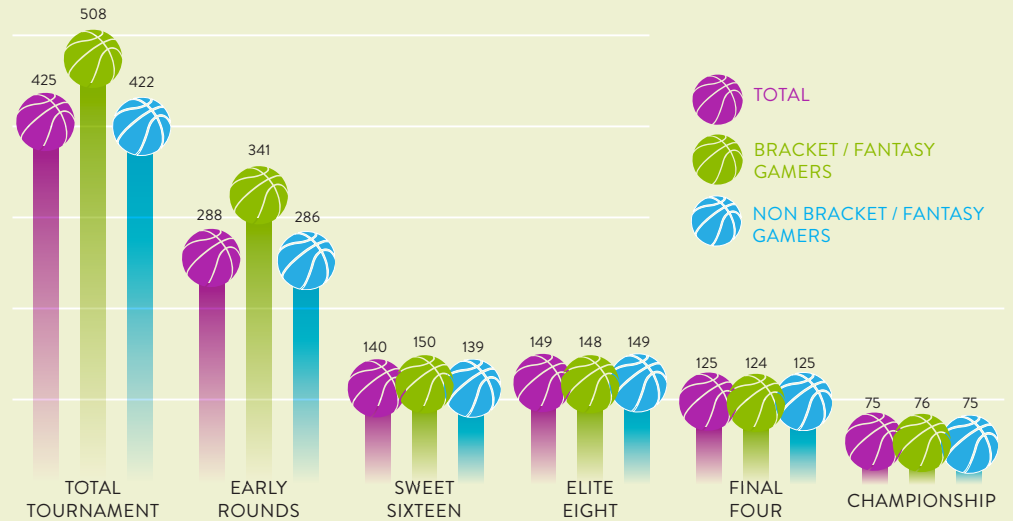


THE KEY ROUNDS DRIVING HEAVY MOBILE GAMERS WERE THE **ELITE EIGHT** AND THE **FINAL FOUR**, WHICH PRODUCED A **69% AND 47% INCREASE** OVER NON-GAMERS.

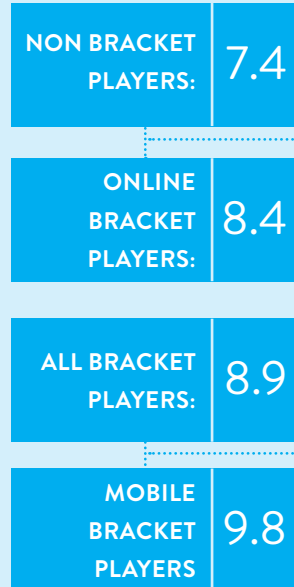


THE KEY ROUNDS DRIVING LIGHT MOBILE GAMERS WERE THE **EARLY ROUNDS OF 64 AND 32**, WHICH CREATED A **39% INCREASE** OVER NON-GAMERS

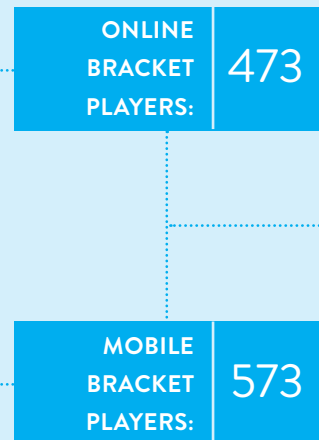
AVERAGE MINUTES WATCHED - 2015 NCAA MEN'S BASKETBALL TOURNAMENT



AVERAGE # GAMES WATCHED



AVERAGE # MINUTES WATCHED



MOST AVID NCAA VIEWERS!

MOBILE BRACKET PLAYERS

"GREATER ENGAGEMENT IN MARCH MADNESS - ON WHICH AMERICANS BET BILLIONS OF DOLLARS - SIGNIFICANTLY INCREASES VIEWERSHIP OF THE NCAA TOURNAMENT," SAID GEOFF FREEMAN, AGA PRESIDENT AND CEO. "THE MORE INVESTED, THE MORE VIEWERSHIP, CREATING LUCRATIVE OPPORTUNITIES FOR ADVERTISERS AND BROADCASTERS ALIKE."