

UNIDCAST

2010 NCAA Basketball Tournament Fever Report

March 10, 2010

Introduction

March Madness, the moniker for the annual competition between the top collegiate teams in basketball, is a sports event that grips the national sports psyche, evoking a frenzy of fan support across the country. With 65 teams playing in intense single-elimination games, the NCAA Tournament demands a constant flow of information for fans, and inspires rivalries between friends and connections between strangers.

As Americans bring more of their daily tasks and media consumption online, it follows that sports fans will appreciate and utilize the up-to-the-minute nature of the Internet and its availability on mobile devices to feed their tournament “madness” in 2010.

What’s more, the engagement of NCAA Tournament fans online presents valuable opportunities to publishers and brand marketers looking to reach the primary March Madness audience – male sports fans aged 18-35.

Key Findings

- 83% of March Madness fans will watch coverage on TV, 44% will go online and 10% will use a mobile device
- ESPN.com dominates site preference with 69%, while Yahoo! Sports gets 42% and CBSsports.com (the official broadcaster) 29%
- 54% of fans plan to watch games live online

Analysis of Findings

TV and Tech Earns Top Points from Americans for March Madness Coverage¹

While a slight majority of Americans (51%) will not be game for March Madness, the remaining 49% who are interested in the tournament this year will use a variety of media to track their favorite teams. The 51% of respondents who will not be following the coverage of March Madness this year were excluded from the results presented at right.²

In which of the following ways, if any, do you plan to follow coverage of March Madness this year? Select all that apply. (N=522)

83%	On television
44%	Online
36%	Print newspaper
11%	Print magazine
10%	On a mobile device
4%	Another way

More than four-in-five adults following March Madness this year (83%) will tune into the tube to watch the games or reporting on the basketball tournament this year. Forty-four percent of March Madness fans will point-and-click online to catch coverage of the games, watch a match, or follow players and teams, and 10% of March Madness viewers will complete a similar exercise on a mobile device.

Other Americans who plan to follow March Madness this year will keep track of wins and losses in a more traditional method through print media including newspapers (36%) or magazines (11%).

Women were nearly twice as likely as men to report that they would refrain from following the reporting on the NCAA tournament in 2010 (66% vs. 34%, all respondents – N=1,062). Male March Madness fans differed from their female counterparts in consulting the varying types of media for information on the tournament, as demonstrated in the nearby chart.

Medium	March Madness Fans	
	Male (N=339)	Female (N=183)
On television	85%	80%
Online	46%	40%
Print newspaper	36%	34%
Print magazine	11%	10%
On a mobile device	11%	7%

As age increased among March Madness watchers, so did likelihood to check the newspaper for scores, stories, or shake-ups (26% of 18-24 year old fans; 30%, 25-34; 32%, 35-44; 43%, 45-54; and 45% for those 55+).

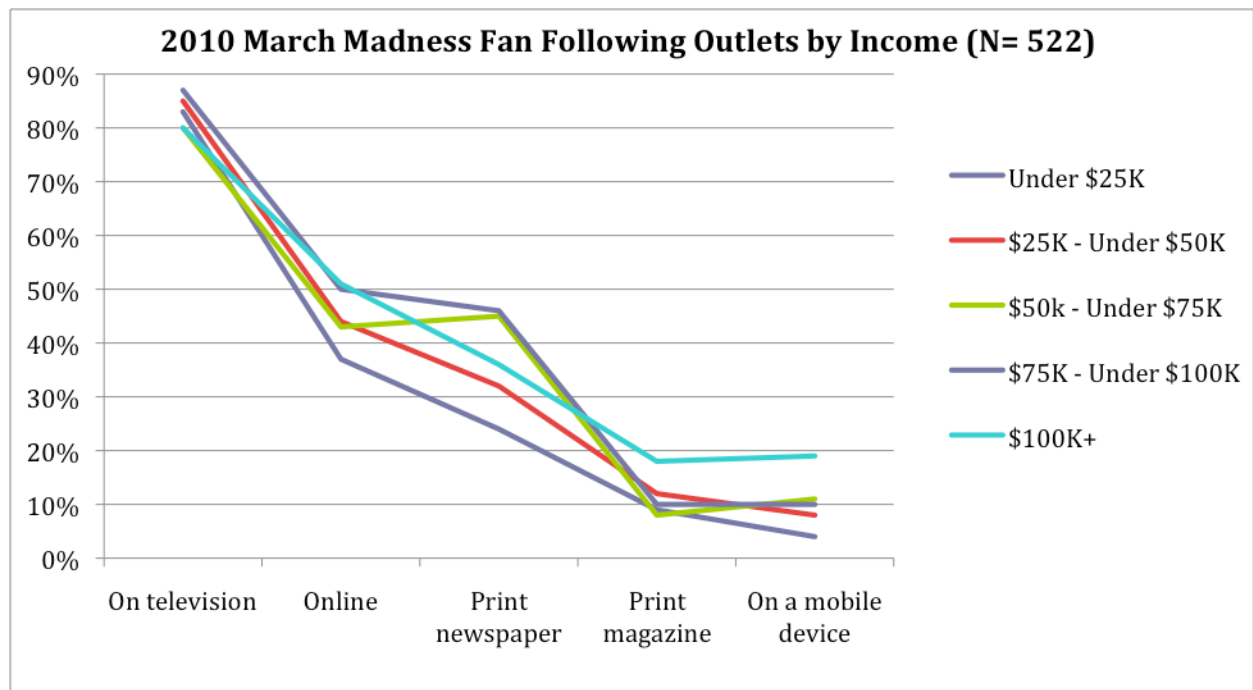
March Madness followers with children age 17 or younger in the household were more inclined to use tech to check the latest info on the games than those without youngsters at home, including online (50% vs. 41%) or on a mobile device (15% vs. 6%).

¹ Not included in the presentation of results is the answer category “By talking about it with friends, co-workers, or family members” which was selected by 18% of respondents overall.

² These respondents selected “Not applicable: I do not plan to follow coverage of March Madness this year.”

There were no statistically significant differences in responses according to the marital status of March Madness viewers.

As the below table demonstrates, March Madness watchers in the higher income segments were more apt than those with lower household incomes to catch the tournament action on the tube, on the computer, in a magazine or newspaper, or on a smart or mobile phone.



Americans Give Their Best Shot Searching for March Madness Coverage on Branded Websites

Of those planning to follow March Madness online or on a mobile device this year (231 respondents), a majority will visit ESPN.com (69%). Other branded sports website popular with Americans to check scores or stats include offerings from Yahoo! (42%), Fox (24%), CBS (29%), and AOL (17%).



More than one-quarter of Americans following the tournament (26%) will go directly to the source at NCAA.com, while 17% will type in the URL for their favorite team on the court.

A number of Americans will also gather the latest on their teams and bracket-dreams, not through a direct link to a website, but via search engines (22%), social networks (18%), or newspaper / magazine sites (20%). The plethora of responses among basketball-watchers demonstrates that individuals may select a “final four” or “final five” sources to stay up-to-date on the action.

Fully seven-in-ten Americans who are planning on following March Madness online or on a mobile device (70%) selected more than one destination online (including the branded website and other online information sources). This means that the majority of March Madness online fans will visit more than one web-based source for tournament information this season.

You mentioned you plan to follow coverage of March Madness online and mobile this year. On which of the following sites do you plan to follow coverage? Please select all that apply. (N=231)

69%	ESPN.com
42%	Yahoo! Sports (Sports.yahoo.com or Rivals.com)
34%	FOXSports.com
29%	CBSSports.com
26%	NCAA.com
22%	A search engine like Google.com or Yahoo.com
20%	Website of newspaper or magazine
18%	Online social network like Facebook, Twitter, or MySpace
17%	AOL Sports (Fanhouse.com)
17%	A specific team's website
6%	Other site(s)

Also prevalent is the switching of March Madness fans between the major branded sports websites. A majority of tournament fans following coverage online or on a mobile device (60%) selected more than one branded website (including ESPN, Yahoo!, Fox, CBS, AOL, or the NCAA sports websites). When it comes to the online content for March Madness it seems like fans are brand loyal, but not necessary brand monogamous.

19% of fans (or 44 respondents) who visit a newspaper or magazine website will also visit at least one of the other branded websites included in the survey (ESPN, Yahoo!, Fox, CBS, AOL, or the NCAA sports websites).

If They are on the Court, They're in the Game

March Madness fans are planning on engaging in a number of activities online and on mobile devices this year to catch all of the tournament action. The table at right includes the responses of those individuals who are planning on following March Madness online this year.³

A number of sports fans following March Madness online this year will be watching the game from their computer – rather than their couch – either at game time (54%) or after it airs (19%). And, if the web-focused basketball fans can't be in front of the TV during the game, 58% will monitoring scores and 49% will watch game highlights online or on their mobile gadget.

Other online tournament followers will be trying their luck and supporting their favorite team by filling out brackets online (42%) or checking on the status of their bracket throughout the tournament (53%).

³ This question was asked of all respondents in the survey (N=1,062), but responses were filtered by those who said they will be following March Madness online in 2010.

Highlighting the social scene for March Madness, and the growing trend of online communities, 26% of March Madness fans following it online will chat with their friends online after a major match-up, 17% will head to chat groups or social networking sites to discuss the latest, and 13% will make plans for tournament viewing-parties or events online.

Methodology

On behalf of Unicast, the polling company™, inc. conducted an online omnibus survey of 1,062 adults (aged 18+) nationwide. The survey was fielded March 4-7, 2010.

Respondents for this survey were selected from an opt-in panel, and had expressed prior consent to participate in online surveys such as this. The demographics of this audience closely match the nationwide population of adults (age 18+) with respect to gender, age, and region.

When sample is based on a self-selected population and not a probability sample (in which everyone in the population has a non-zero chance of being selected), no conclusions can be drawn with respect to sampling error.

About Unicast:

Unicast has been providing state-of-the-art rich media solutions for publishers, agencies and advertisers since 1998. Integrating creative support with campaign management and detailed analytics, Unicast technologies empower customers to manage the complex process of deploying online advertising campaigns. Unicast is a proud member of the DG FastChannel (NASDAQ: DGIT) family of companies - a multichannel distribution network of thousands of advertisers and media publishers worldwide. Today, our solutions are leveraged globally by some of the world's most esteemed brands, including AOL, Fox Interactive Media, MSN, MindShare, NBC Universal, ABC, CBS, and Initiative Media. For more information visit www.unicast.com and visit our blog, www.unicast.com/blog/.

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Which of the following, if any, do you plan to do online or mobile in relation to March Madness?

Select all that apply. (N=231)

58%	Monitor scores
54%	Watch games live
53%	Check status of brackets
49%	Watch game highlights
42%	Fill out brackets/participate in a pool
26%	Discuss games online with friends
22%	Research teams/players
19%	Watch games after they air
17%	Discuss games online with chat groups/social network sites
13%	Plan parties/events to watch games
3%	Other