

nielsen

# A.G.A. NCAA TOURNAMENT VIEWERSHIP ANALYSIS

BRACKET/FANTASY SPORTS GAMERS AND 2015  
NCAA MEN'S BASKETBALL TOURNAMENT

03/21/2016

# ANALYSIS DETAILS

**Report Type:** Reach & Frequency

**Playback Period:** Live + Same Day

**Programs:** 2015 NCAA Men's Basketball Tournament

Total Tournament

Early Rounds (64 & 32)

Sweet Sixteen

Elite Eight

Final Four

Championship Game

**Demographics:** Persons, Males, Females 18+

Composite (Total)

Bracket/Fantasy Gamers

Non-Bracket/Fantasy Gamers

**Bracket/Fantasy Gamers are any individual who went to a fantasy/bracket site or mobile app**

**Bracket Sites:**

- [sports.yahoo.com/college-basketball/bracket/tournament.fantasysports.yahoo.com](http://sports.yahoo.com/college-basketball/bracket/tournament.fantasysports.yahoo.com)
- [cbssports.com/collegebasketball/ncaa-tournament/brackets/games](http://cbssports.com/collegebasketball/ncaa-tournament/brackets/games)
- [ncaa.com/bracketchallenge](http://ncaa.com/bracketchallenge)
- [games.espn.go.com/tournament-challenge-bracket/2016/en/bracket](http://games.espn.go.com/tournament-challenge-bracket/2016/en/bracket)
- [dailybracket.com/](http://dailybracket.com/)
- [teamrankings.com/ncaa-tournament/bracketology/](http://teamrankings.com/ncaa-tournament/bracketology/)
- [runyourpool.com/march-madness-pools.cfm](http://runyourpool.com/march-madness-pools.cfm)

**Mobile Apps:**

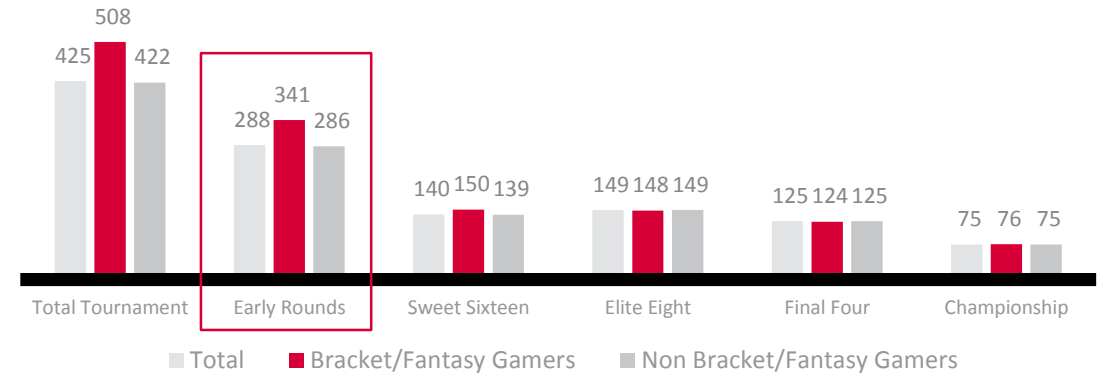
- ESPN Tournament challenge
- NCAA March Madness Live
- Yahoo Fantasy App
- Daily Bracket

Nielsen's viewership analysis of bracket/fantasy gamers and the 2015 NCAA Men's Basketball Tournament leveraged Nielsen's TV/Digital Fusion, which uses Nielsen's behavioral panels (Nielsen's National TV Panel and Nielsen's Online and Mobile Panels). Nielsen segmented out bracket/fantasy gamers, and then crossed that segment with TV viewership of the 2015 NCAA Tournament. Their viewership was then compared to non-bracket/fantasy gamers and the general population.

# American Gaming Association | Key Insights

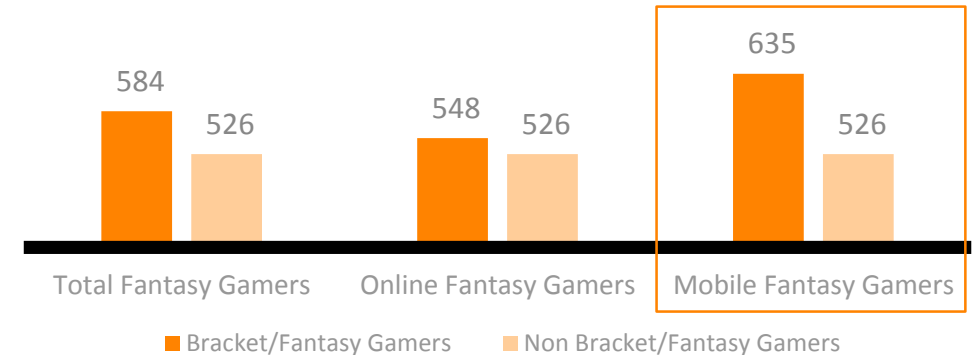
- The 2015 NCAA Men's Basketball Tournament reached a **larger concentration** of Bracket/Fantasy Gamers, compared to the Total Population; this was consistent across each round of the tournament.
- Bracket/Fantasy Gamers spent **21% more minutes** and watched **20% more NCAA Tournament Games** than Non-Gamers. This was especially true for the Early Round Games.

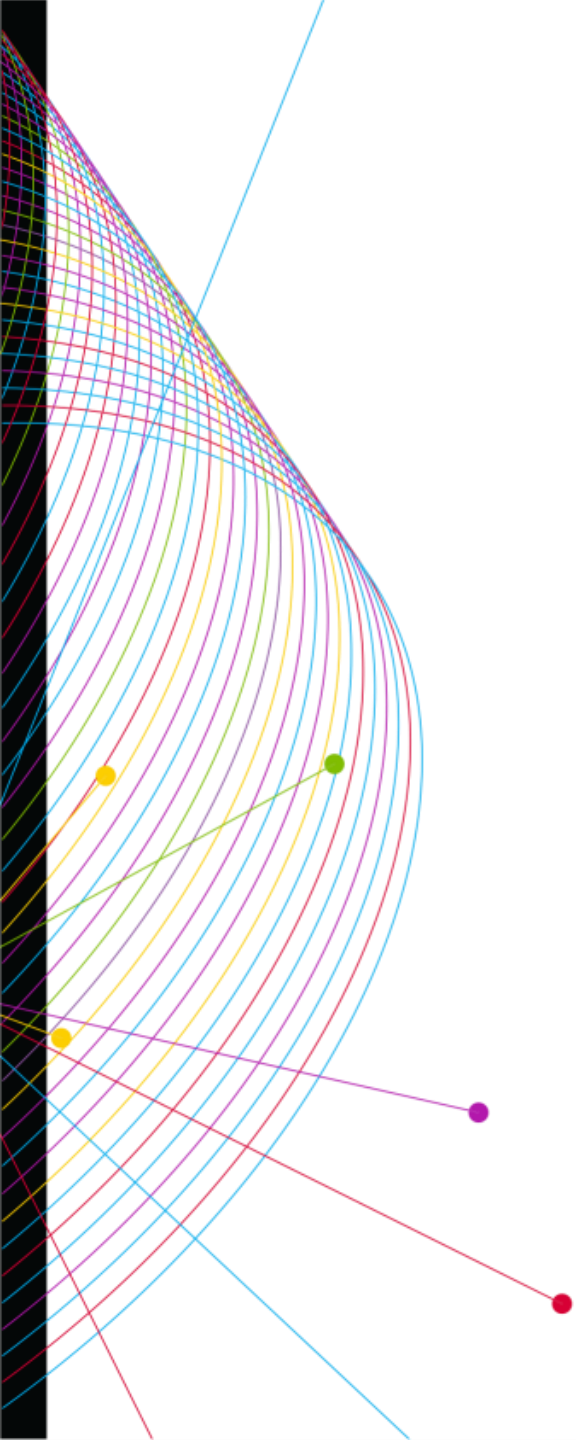
Average Minutes | P18+ | 2015 NCAA Men's Basketball Tournament



- Overall Bracket/Fantasy Gamers watch more NCAA Tournament basketball than Non-Gamers, but Mobile Bracket/Fantasy Gamers are the most avid viewers. Mobile Gamers averaged **36% more minutes** watching the Total Tournament.

Avg. Minutes | M18+ | Total NCAA Tournament '15

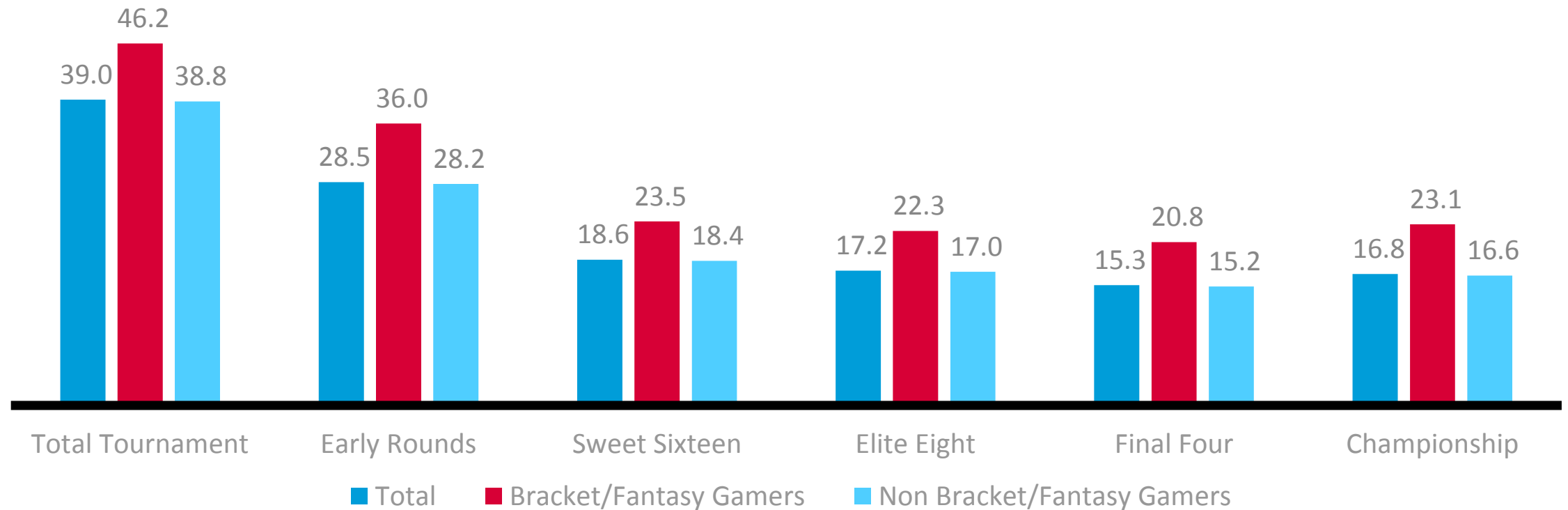




# PERSONS 18+

# THE HIGHER CONCENTRATION OF BRACKET/FANTASY GAMERS HOVERS AROUND A 20% LIFT IN REACH PERCENT COMPARED TO NON-USERS ACROSS EVERY ROUND OF THE TOURNEY

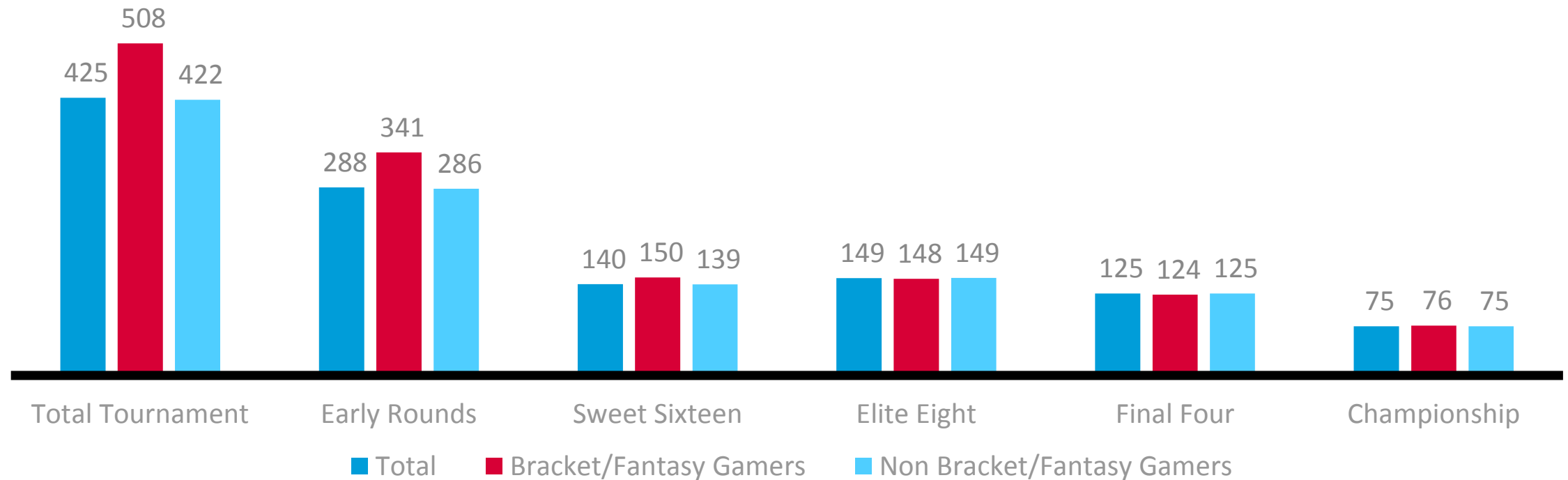
Reach Percent | P18+ | 2015 NCAA Men's Basketball Tournament



SOURCE: Nielsen National TV Toolbox, Reach & Frequency Report, American Gaming Association Users, Non-Users, and Total Audience of 2015 NCAA Men's Basketball Tournament, 6 Minute Qualifier, Live+SD Viewing

# BRACKET/FANTASY GAMERS SPEND ABOUT 21% MORE MINUTES WATCHING THE NCAA TOURNEY, MOSTLY DURING THE EARLY ROUNDS OF THE TOURNAMENT

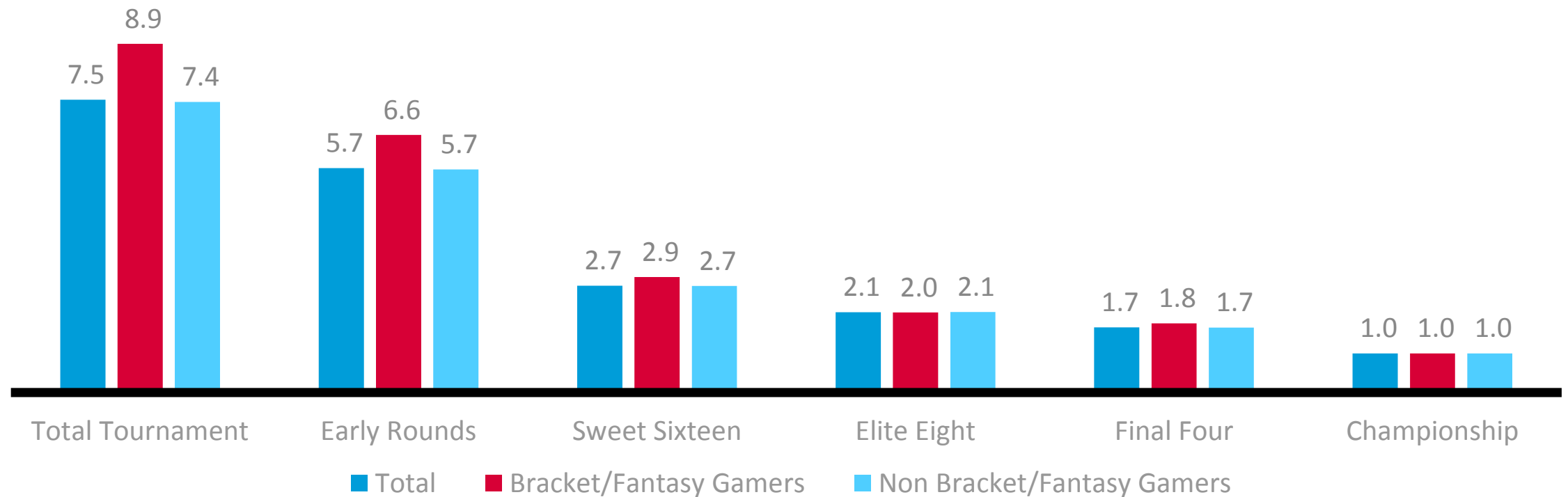
Average Minutes | P18+ | 2015 NCAA Men's Basketball Tournament



SOURCE: Nielsen National TV Toolbox, Reach & Frequency Report, American Gaming Association Users, Non-Users, and Total Audience of 2015 NCAA Men's Basketball Tournament, 6 Minute Qualifier, Live+SD Viewing

# BRACKET/FANTASY GAMERS ALSO AVERAGE ABOUT 20% MORE GAMES WATCHED, DUE IN LARGE PART TO THE EARLY ROUNDS

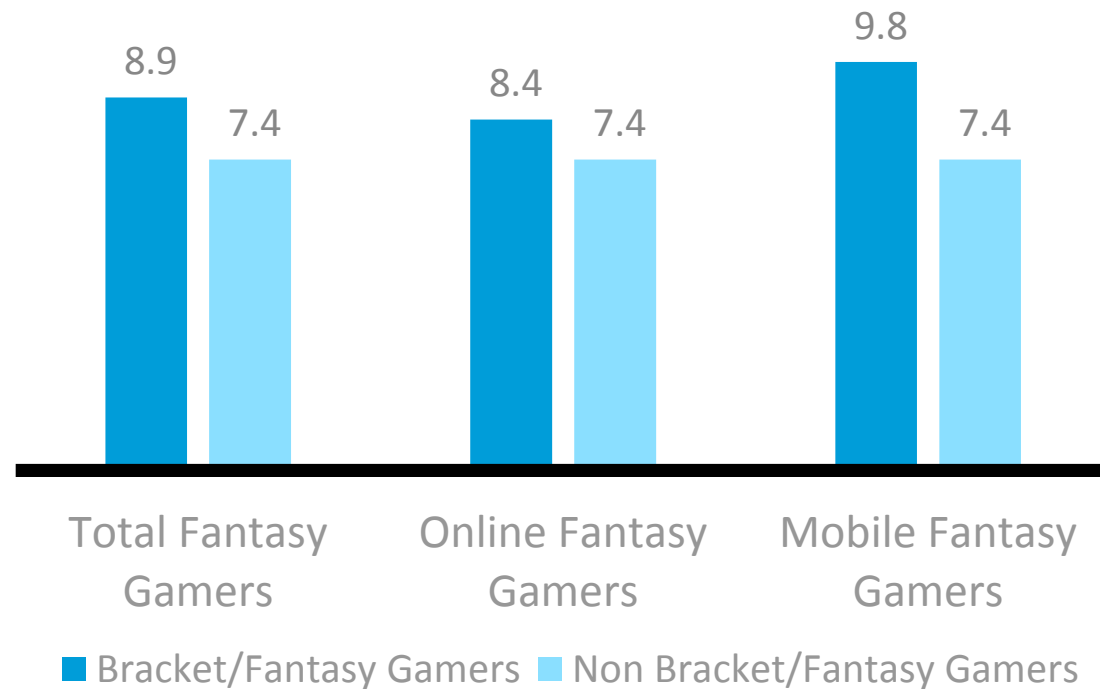
Avg. Games Watched | P18+ | 2015 NCAA Men's Basketball Tournament



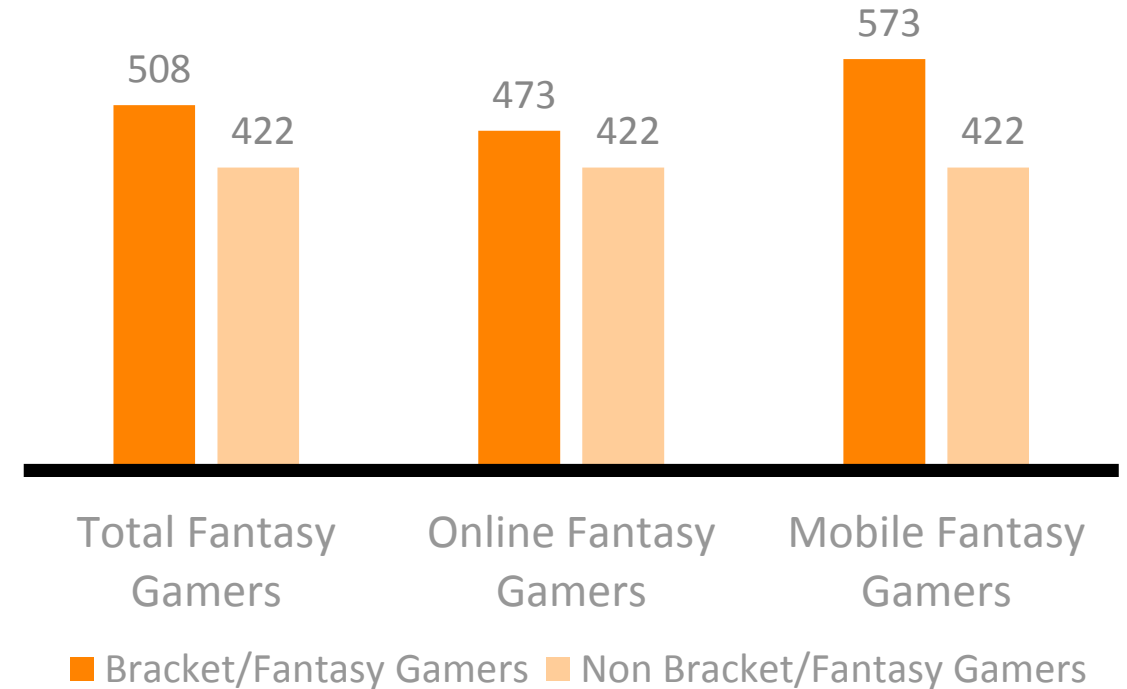
SOURCE: Nielsen National TV Toolbox, Reach & Frequency Report, American Gaming Association Users, Non-Users, and Total Audience of 2015 NCAA Men's Basketball Tournament, 6 Minute Qualifier, Live+SD Viewing

# OVERALL BRACKET/FANTASY GAMERS WATCH MORE NCAA TOURNAMENT BASKETBALL THAN NON GAMERS, BUT MOBILE BRACKET/FANTASY GAMERS ARE THE MOST AVID VIEWERS

Avg. # Games | P18+ | Total NCAA Tournament '15

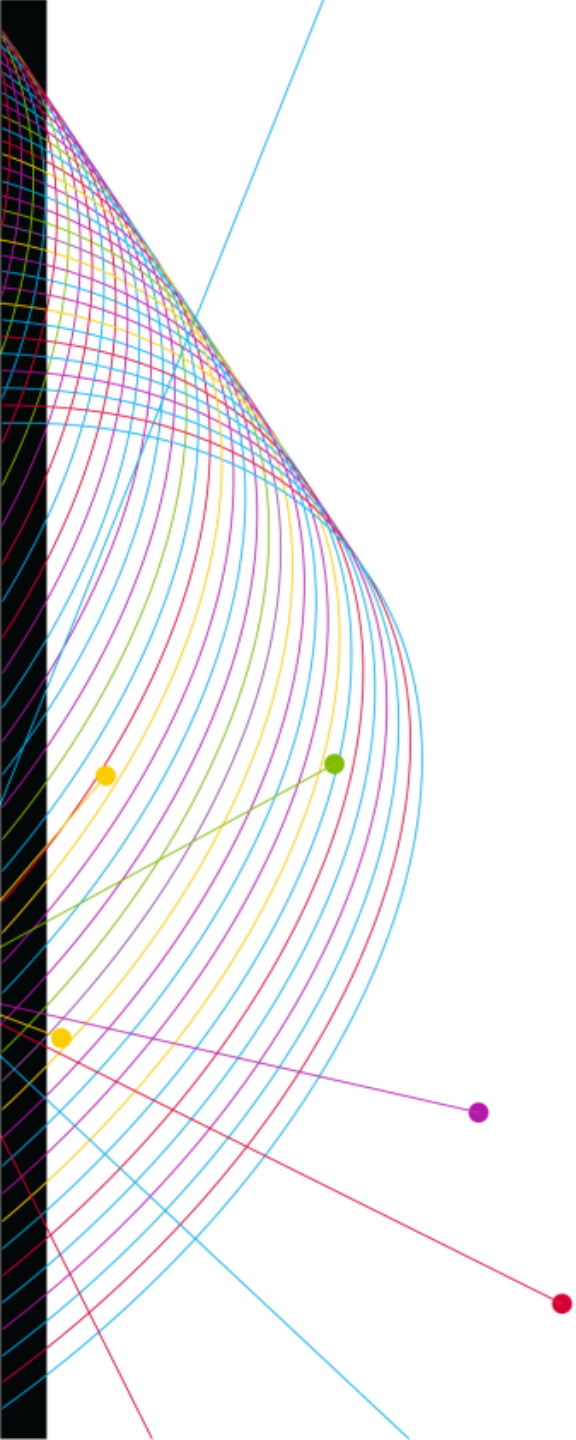


Avg. Minutes | P18+ | Total NCAA Tournament '15



SOURCE: Nielsen National TV Toolbox, Reach & Frequency Report, American Gaming Association Users, Non-Users, and Total Audience of 2015 NCAA Men's Basketball Tournament, 6 Minute Qualifier, Live+SD Viewing

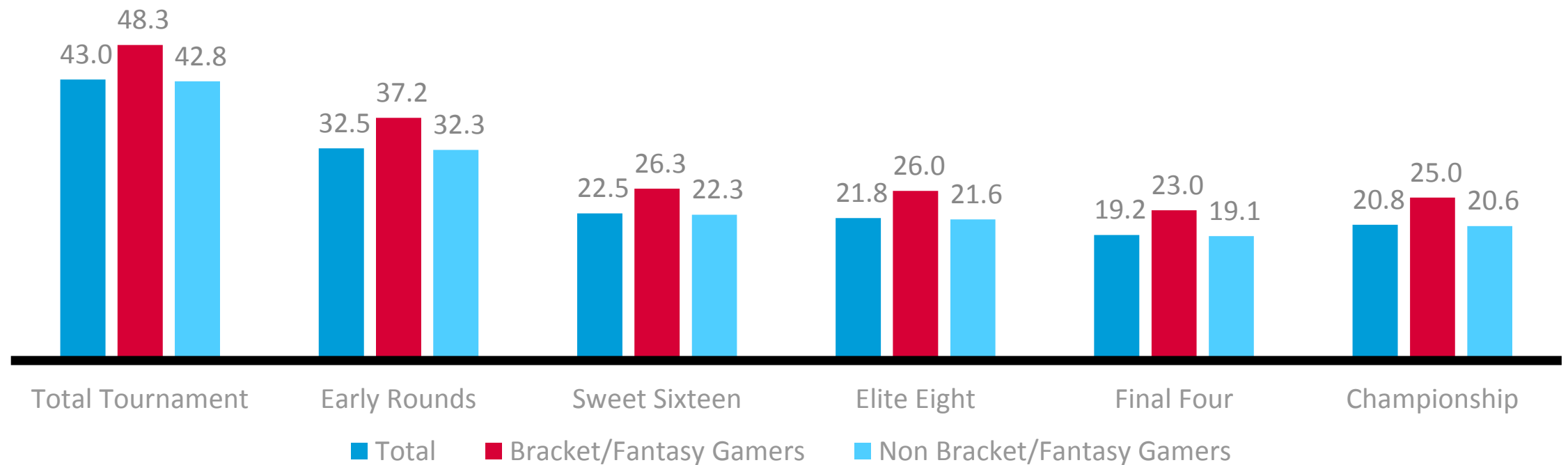




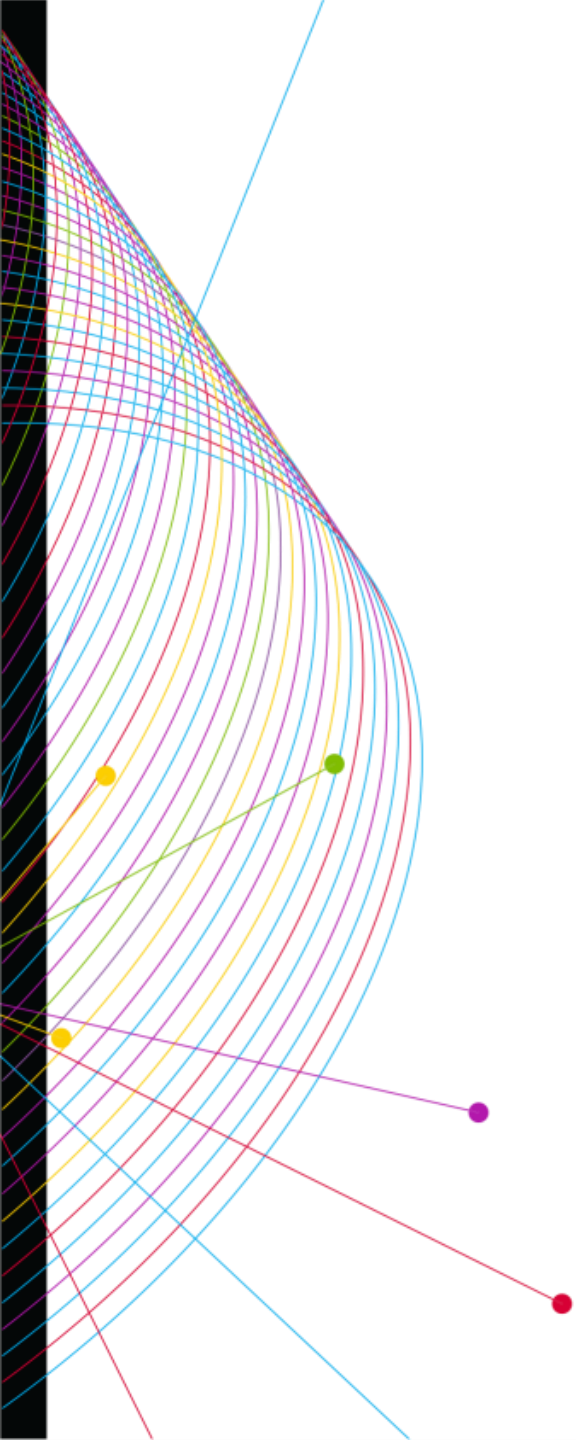
# MALES 18+

# THE HIGHER CONCENTRATION OF GAMERS CONTINUES TO GROW AS THE TOURNAMENT PROGRESSES, STARTING WITH ABOUT 13% AND ENDING AT 21%

Reach Percent | M18+ | 2015 NCAA Men's Basketball Tournament



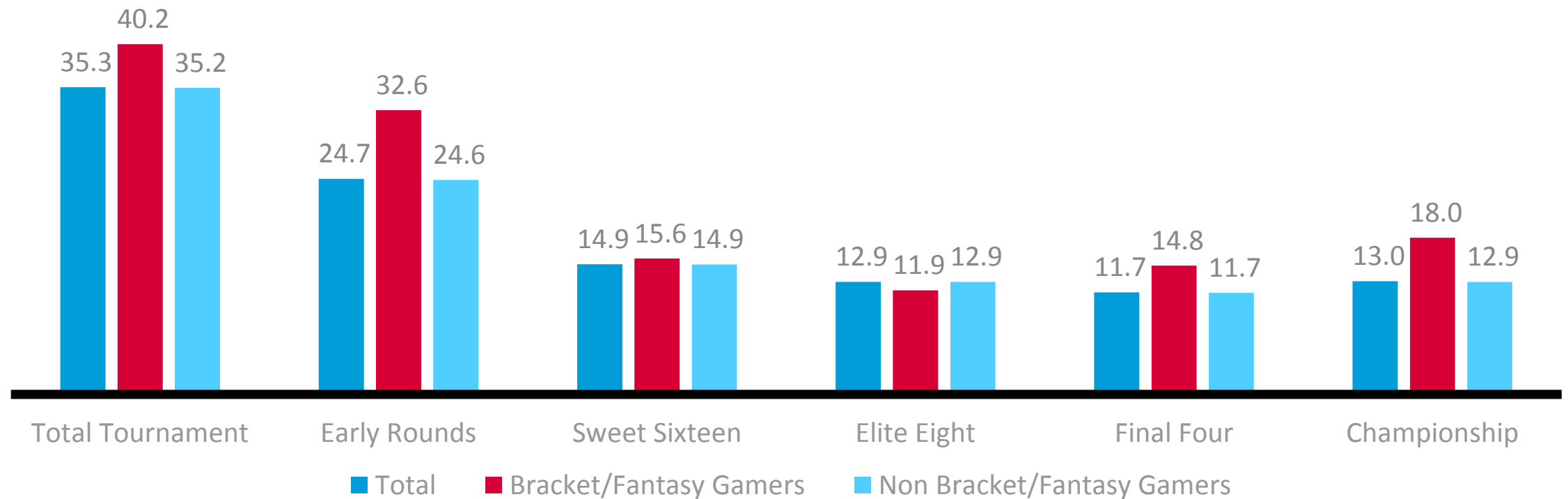
SOURCE: Nielsen National TV Toolbox, Reach & Frequency Report, American Gaming Association Users, Non-Users, and Total Audience of 2015 NCAA Men's Basketball Tournament, 6 Minute Qualifier, Live+SD Viewing



# FEMALES 18+

# THE HIGHER CONCENTRATION OF BRACKET/FANTASY GAMERS STARTS OFF VERY STRONGLY, DROPS IN THE MIDDLE, BUT THEN PICKS UP AGAIN FOR THE FINAL FOUR AND CHAMPIONSHIP GAME

Reach Percent | F18+ | 2015 NCAA Men's Basketball Tournament



SOURCE: Nielsen National TV Toolbox, Reach & Frequency Report, American Gaming Association Users, Non-Users, and Total Audience of 2015 NCAA Men's Basketball Tournament, 6 Minute Qualifier, Live+SD Viewing