



For interview requests and queries:

Bill Daddi
Daddi Brand Communications
212-404-6619
917-620-3717
Bill@DaddiBrand.com

TNS MEDIA INTELLIGENCE RELEASES MARCH MADNESS ADVERTISING TRENDS REPORT

Analysis Highlights Revenue Growth, Top Spenders and Advertising Revenue Rank Relative To Other Leading Sporting Events

New York, NY, March 10, 2009 - As sports fans across the country get ready to fill out brackets predicting the outcome of the NCAA Men's Division I Basketball Tournament, advertisers are also eagerly anticipating the 19-day event known simply as "March Madness."

"As a sports marketing event, the collegiate basketball tournament is part of a Final Four alongside the Super Bowl and the Summer and Winter Olympics," said Dean DeBiase, CEO, TNS Media. "The Tournament is a powerful property for both advertisers and CBS. Its popularity extends to a broad, diverse cross-section of the population and provides marketers with an important opportunity to connect with consumers over a three week period via multiple platforms including TV, online, social media and in-store. It's an ideal event for utilizing an integrated media mix and interest in the tournament this year should be high. Leveraged correctly, this is a great vehicle for traditional powerhouses and Cinderella brands alike."

For many of the companies linking themselves to the tournament, the focal point will be commercial spots airing during the 65+ hours of game telecasts on CBS. The financial stakes are certainly high for the network, which this year is paying the NCAA a base **license fee of approximately \$571 million** covering exclusive TV, digital, radio, publishing and merchandising rights for the tournament.

TNS Media Intelligence has once again drawn upon its extensive database to provide the most current statistics and trends on March Madness advertising.

1. March Madness: An Advertising Bonanza

Over the past 10 years (1999-2008), advertising during the Tournament has translated into \$4.2 billion of network TV spending from nearly 300 different marketers. In 2008, ad spending reached an all-time high of \$643 million, a 24 percent increase from the prior year.

**NCAA Men's Division I Basketball Tournament
Network TV Advertising*: 1999-2008**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	Total
Spend (\$ million)	270	319	318	358	380	451	475	500	520	643	4,234
# of Advertisers	83	75	113	125	95	99	92	104	126	102	291
<i>* Includes pre-game, game and post-game programming</i>											
<i>Source: TNS Media Intelligence</i>											

2. Outpacing The Competition

The post-season **NCAA Tournament brings in more national TV ad revenue than the post-season playoffs for professional baseball, professional basketball or college football.** Only the National Football League playoffs, which includes the Super Bowl, is more lucrative.

**2008 Post-Season Sports:
National TV Ad Spend (\$ millions)***

Pro Football (Jan-Feb '08)	748
NCAA Men's Basketball (Mar-Apr '08)	643
Pro Basketball (Apr-Jun '08)	330
Pro Baseball (Oct '08)	326
College Football Bowls (Dec '07-Jan '08)	250
<i>* includes Pre-Game, Game & Post-Game Programming</i>	
<i>Source: TNS Media Intelligence</i>	

3. The Price of Advertising

Among the major televised sporting championships, **only the Super Bowl commands a higher advertising unit rate than the NCAA Men’s Basketball championship game**. College hoops has higher unit ad pricing than the major college football bowl games; the NBA championship; and the MLB World Series.

In terms of cost-per-thousand viewers, the NCAA Final Four games are far more expensive than any of the other annual blue-chip sporting events.

Average Network TV Ad Pricing for Major Sporting Events

	Avg :30 Rate (\$000)	Estimated CPM (HHs)
NCAA Men’s Division 1 Basketball Tournament (2008)		
Championship Game	1,241	\$93
Semi-Final Games	800	\$75
NATIONAL FOOTBALL LEAGUE (2008)		
Super Bowl	2,700	\$55
AFC & NFC Championship Games	1,080	\$34
OTHER EVENTS (2008)		
College Football – BCS Championship Game	900	\$56
College Football – BCS Bowl Games	510	\$55
MLB World Series	400	\$42
NBA Championship Series	341	\$32

Source: TNS Media Intelligence

4. Top Spending Advertisers in March Madness

March Madness has a core group of TV sponsors that invest heavily in the broadcasts year after year. On average, more than **80% of the tournament’s network TV ad revenue has come from returning advertisers**, an above-average retention rate versus other top sporting events.

General Motors, AT&T and Coca Cola have consistently been the leading TV advertisers and in 2008, they spent a combined \$140.6 million and accounted for 22 percent of the total ad revenue. Although GM bowed out of both the Super Bowl and the Academy Awards earlier this year, its participation with March Madness continues.

**Top 10 TV Advertisers
NCAA Men's Division 1 Basketball Tournament: 2008**

Rank	Company	2008 Ad Spend (\$ Millions)
1	General Motors Corp	79.7
2	AT&T Inc	35.1
3	Coca-Cola Co	25.8
4	Anheuser-Busch InBev	22.0
5	Lowe's Cos Inc	21.9
6	Nike Inc	21.7
7	US Government	21.2
8	SABMiller Plc	20.8
9	State Farm Mutual Auto Insurance	15.0
10	Daimler Ag	13.6

Figures reflect Network TV only and include all pre-game, game and post-game programming

Source: TNS Media Intelligence

General Motors, Coca-Cola; and AT&T pay additional fees into the NCAA's "Corporate Champions" program, the organization's top sponsorship level. This gives them additional opportunities to build marketing programs around March Madness and other NCAA sports.

5. On Demand Video Streaming

In 2009, CBSSports.com will again stream live tournament games over the Internet, making them available on demand and free of charge to PC users with a broadband connection. The ad-supported webcasts offer presenting sponsors another way to get their commercial messages in front of viewers.

Online viewership is heavily concentrated in the first two rounds of the tournament when multiple games are taking place simultaneously and fans are seeking the flexibility to view the action from out-of-home locations or watch games not being telecast on their local CBS affiliate.

Though growing rapidly from a small base, the **digital ad revenue is still a fraction of that generated by the traditional TV broadcasts.**

**NCAA Men's Division 1 Basketball Tournament:
Offline vs. Online Ad Revenue**

Ad Revenue in \$ Millions			
<u>Year</u>	<u>Total</u>	<u>CBS TV Broadcasts</u>	<u>CBS Internet On Demand</u>
2006	\$504	\$500	\$4
2007	\$529	\$520	\$9
2008	\$666	\$643	\$23
<i>Sources: TV revenue estimates from TNS Media Intelligence; On Demand ad revenue estimates from CBS</i>			

About TNS Media

Established in more than 30 countries, TNS Media explores all media - print, radio, TV, Internet, social media, cinema and outdoor worldwide, 24 hours a day, seven days a week, and offers a full range of insights, analyses and audience measurement services.

TNS Media combines the deepest expertise in the industry to provide media and marketing intelligence including advertising expenditure monitoring, advertising creation monitoring, audience measurement, market influence analytics, online consumer behavior tracking, news monitoring, sports sponsorship evaluation and more. The TNS Media companies track more than 3 million brands and provide vital market intelligence to 16,000 customers around the world. For further information, please visit www.tnsmediagroup.com

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