

Instead of "cherry-picking our schedule to find good games," said Matthews, "people now know that on Monday night they will get two quality games." And, concurring with the NBA's John Kosner that making each broadcast "special" is the first antidote to a "glut," he added: "Monday has become special, and we want to extend that success to other nights of the week." Noting that Saturday has been the lowest rated segment of ESPN's basketball schedule, Matthews conceded that the strategy could also minimize ESPN's losses amid the strong weekend college and professional basketball schedules on other networks and local TV.

Despite the "more and better competition," he said, ESPN saw its average prime time rating and household totals increase for a fifth season in a row, from a 1.4 rating and 423,000 households in 1983-84, to a 2.0 rating and just more than one million homes in 1988-89. Its coverage of the first half of the NCAA tournament has also risen from 2.8% and 850,000 homes in 1983-84 to 3.1% and 1.55 million homes last season.

Of ESPN's having "limited ourselves to four nights a week," Matthews observed that the schedule works to "assure our niche on weeknights" within the larger television market, but also allows ESPN to schedule programming for its various nonbasketball niche audiences. "We are a total sports network, and we try to bring the national collegiate basketball picture to the nation," he said of a schedule that will again include several early season tournaments (including the Dodge NIT, Great Alaska Shootout and Maui Classic), "Championship Week," March 3-11, featuring 23 conference title games, and 19 games picked from the first 32 of 64 NCAA tournament games.

By virtue of a four-year agreement signed last April, that schedule will now also include the newly created "The ACC-Big East Challenge Week," a regular season series matching up eight teams from each conference in four doubleheaders, Monday through Thursday, the first week of each December.

The USA Network has cut back considerably on its college basketball schedule, from 32 games two years ago, to 20 last year, to one tournament this year. USA will carry the Diet Pepsi Tournament of Champions from Charlotte, N.C., Dec. 1 and Dec. 2. The tournament will feature Pittsburgh vs. Oklahoma State, and Ohio State vs. North Carolina State.

SportsChannel America will carry 19 Notre Dame games this year, including all home games not on network television. Included in the schedule is the UCLA at Notre Dame game Dec. 17. SCA will also carry five games of UNLV against Big West opponents and 11 Atlantic 10 games, including 10 Saturday game-of-the-week contests, beginning Jan. 17, plus the Atlantic 10 semifinals. A hodgepodge of other games and tournaments will give SCA 80 games this season.

WGN-TV Chicago, which lost Notre Dame to SCA this year, has picked up a package of Illinois games, to complement its package of DePaul contests. Both schools will appear 14 times in a schedule beginning in December.

Black Entertainment Network will carry between 20 and 25 games, depending on the number of games from several tournaments it will feature. The schedule of black conference games begins Dec. 2 with a women's invitational tournament.

Syndication: Local interest, national reach

Once again, 10-year-old Raycom Sports and Entertainment, based in Charlotte, N.C., retains regional syndication rights to six major college basketball conferences: the Atlantic Coast (ACC), Big Eight, Big Ten, Metro, Pacific 10 (Pac-10) and Southwest (SWC). All told, Raycom will produce and distribute 170 games from those conferences, and although in each case over-the-air distribution is limited to the conference region, Raycom continues to successfully sell advertising across its schedules, reaching 75% of the nation, 5% more than it was able to claim last year.

Indeed, Raycom has been able to present to those advertisers impressive numbers from the 1988-89 season. All six conferences saw increases over the previous season in households delivered: ACC up 31.5% in prime time; Metro up 18.4% in prime time; Big Eight up 39.5%; SWC up 12.2%; Pac-10 up 8.3%, and Big Ten up 23.5% on Saturday afternoons. "Naturally, any time you increase household delivery and national reach, it puts you in a better

position with national advertisers," said Ken Haines, executive vice president, Raycom.

Last November, Raycom and the Pac-10 signed a new three-year agreement through the 1991-92 season, and last March, Raycom and the Big Ten signed a new six-year pact running through 1994-95. New deals have also been made with the ACC and Big Eight. College basketball, said Haines, "is more conducive to regionalization" than college football, since with football there are fewer games and more limited windows that force local broadcasters to compete with national schedules, and the cost of production is considerably higher; therefore, national networks appear to be strengthening their hold on football rights.

Raycom will distribute 27 Pac-10 conference games and seven tournament contests to 14 markets in four western states this season. The 22-game Big Ten schedule will go to 38 markets in seven states where Raycom also packages for individual schools that include Michigan and Michigan State, Indiana, Purdue and Northwestern (via cable in Wisconsin).

Stations in 18 markets in five Atlantic Coast states will carry Raycom-Jefferson-Pilot-Telecommunications' 38-game ACC package, which will also be carried nationally on NBC. Raycom's 29-game Big Eight package (including seven Phillips 66-sponsored tournament games) will reach 18 markets in five Midwestern states. Its 26-game Metro Conference package (including two tournament games) has been cleared in 20 markets in eight Tennessee Valley and other southern states. And stations in 19 markets in Texas and Arkansas will carry Raycom's 18-game SWC schedule, which includes three tournament games.

Regional reach

Thanks to a two-month-old agreement between Raycom and Prime Network, many teams in the conferences to which Raycom holds rights—ACC, Big Eight, Big Ten, Metro, Pac-10 and Southwest—will experience extended national exposure. Prime Network is a program-sharing consortium of regional cable sports channels including Home Sports Entertainment (Houston and Dallas), Prime Sports Network (Denver), Prime Ticket (Los Angeles) and Prime Sports Network Midwest (Indianapolis), as well as affiliates in Washington-Baltimore, Detroit and New York.

Within several weeks after Raycom and Prime announced a joint bid for rights to Southwest Conference football, basketball and other sports (BROADCASTING, Aug. 14), the two announced the larger cooperative venture. Through it, as Raycom delivers dozens of conference games to broadcast stations in dozens of markets in each conference region, Prime affiliates outside that region will have access to those games, except where the contract prohibits it or where a shared rights agreement with ESPN or one of the broadcast networks already exists. With the ACC, for example, ESPN carries Raycom games in all regions except the Atlantic Coast.

Most of the Prime affiliates hold rights to one or more local college schedules. Denver-based Prime Sports Network, for example, will carry 12 Colorado State games and also the "Mile High Classic," featuring Colorado State, Colorado, Massachusetts and North Carolina. And Detroit-based Pro Am Sports System will carry 11 Mid-America Conference games between Dec. 2 and March 3.

The extended reach via cable—Prime claims 11 million subscribers total—will undoubtedly improve Raycom's ability to sell spots across its schedule to advertisers that want to reach 70%, and more, of the nation. Prime and Raycom have also made clear their intention to consider joint bids for other properties in the future.

Among partners in the Prime Network program sharing affiliation, Dallas-based Home Sports Entertainment will carry 100 college games, including games from the Southwest Conference and from the Big Eight, Western Athletic, Pac-10 and Metro conferences. HSE contracts with individual schools include Florida State, Louisiana State, Southern Methodist and Houston. And Seattle-based Prime Sports Northwest will carry 15 games encompassing the University of Washington, Washington State and Oregon State. That schedule will also be supplemented by another 15 Pac-10 games from Raycom (via Prime Network). Prime General Manager Clayton said that Raycom telecasts include a revenue-

There's Life After Overkill

Despite a Games Glut, College Hoops Packs In the Advertisers

BY WAYNE FRIEDMAN

No matter which way you turn the knob, the picture just doesn't get any clearer for college basketball. Every year, it seems, there's more carping about clutter and the erosion it causes in TV ratings for individual games. Yet there will be even more games televised this season, in spite of generally mixed ratings both regionally and nationally in the '87-'88 season. And there will probably be more advertising on those games as well.

That's not as incongruous as it may sound. While advertisers continually express concern over the glut of college hoops on the tube, they probably won't change their habits. College basketball delivers an audience they need, so they buy it.

"The advertising demand is there," says Marc Goldstein, senior vp-national broadcast and programming for Lin-tas: USA.

Approximately 600 games will be seen this season against about 580 last year, says Rick Ray, CEO at Raycom, the biggest syndicator of college basketball. This will continue to give viewers a college dense-pack of games with a choice of a half-dozen or more contests on any particular weekend during the first quarter of the year, when the majority of games are aired.

"It's no surprise that ratings have suffered," says Richard Hamilton, senior vp/media director for D'Arcy Masius Benton & Bowles. "But we don't view that as a negative. You can find the audience. You just have to be smarter."

Wayne Friedman is a senior editor for Cablevision magazine in New York.

College basketball will likely continue to be a darling of Madison Avenue because it is the only big-time sport in the first quarter that consistently delivers an audience of upscale, educated men. General Motors thinks so highly of it this year that it recently snapped up exclusive arrangements with ABC-TV and NBC-TV. GM also increased its syndication budget 300% for the various syndicated packages offered by Raycom Sports, which says it is nearly sold out in both the Big Eight and the Big Ten.

That upscale male appears to be at-

The NCAA tournament on CBS is 'the honey they use to lure advertisers.'

—Steve Grubbs
BBDO

tracting incremental advertising. Steve Grubbs, senior vp/director-national television for BBDO, says, "We do see some new people [advertisers] coming in who haven't been there before."

This season, Raycom has added the Big Ten Conference to its array of powerful leagues, which include, among others, the Atlantic Coast Conference, in which it is an equal partner with Jefferson-Pilot Teleproductions, and the Pac-10 Conference. With this addition, Raycom can now reach 75% of U.S.

households with its syndicated packages. In syndicated television, 75% potential coverage is something of a magic number. It represents the point at which advertisers can consider syndicated TV a national buy.

"It makes it easier to buy from one packager," says Grubbs.

Other regional distributors, such as Jefferson-Pilot, are also doing a brisk business. Dan Duvall, the group's general sales manager, says the Southeastern Conference is 95% sold out.

Regional conferences are an efficient way for advertisers to target specific products and services. An indication of their strength can be found from an aggregate rating of the top conferences. The total household coverage among the ACC, Big Eight, Big Ten, SEC, Metro, Southwest Conference, Big East, and the Pac-10, is 86.8% of U.S. TV households. Using data from Arbitron and A.C. Nielsen, these conferences pulled a 4.7 rating in the February '88 sweep period, according to John Reilly, research director, for Jefferson-Pilot Teleproductions. That compares favorably with the highest rated regular season schedule of

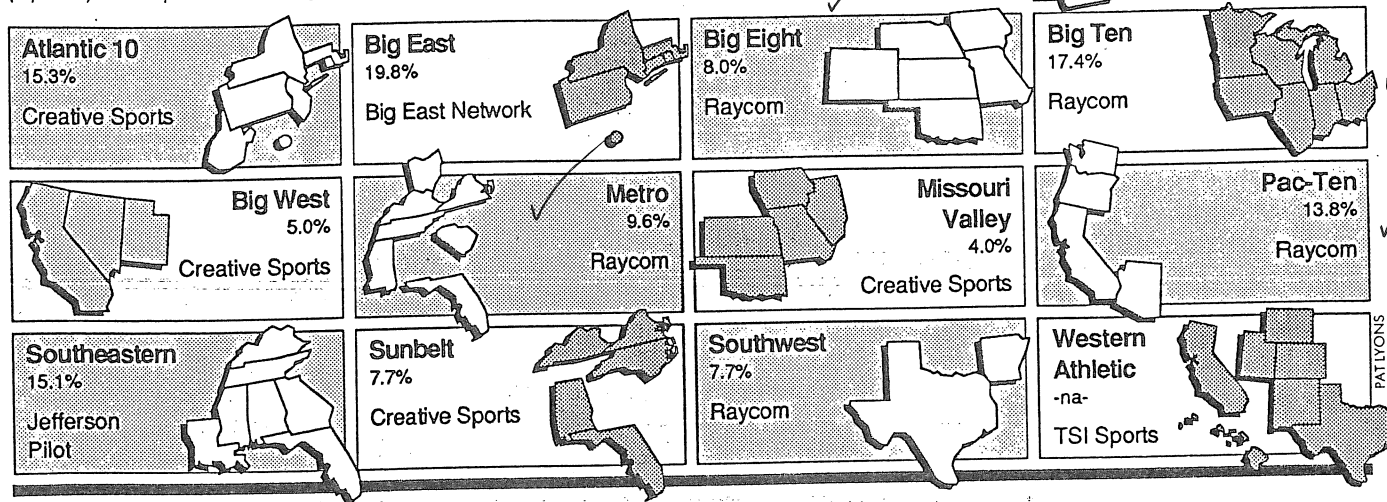


games on a broadcast network, those on CBS, which netted a 4.2 average.

While syndication may seem to be gaining, the broadcast networks aren't just rolling over. They are just now starting to knock on doors, and in CBS's case, asking for increases of 15% to 20% across the board for their regular season spots and for the NCAA tournament, according to ad agency sources. From an approximate \$30,000 spot cost on the average net-

Conferences and Syndication

For each conference, the box contains the name of the syndicator, the fraction of the total U.S. market reached by the syndicate (in percent) and a map of states containing member schools



work rate card last year, that computes to \$34,500 to \$36,000. In some cases spots can go as high as \$40,000, according to one ad executive, depending on the game and time of year.

The NCAA tournament will be priced from a hefty \$115,000 for an early round match to a cool \$450,000 for a :30 in the championship game.

Though NBC-TV and ABC-TV aren't likely to get such huge rate increases, they're still seeking a hike of 5% to 10% over last season, says one advertising source. These networks don't have the selling leverage of the NCAA tournament, which CBS sells in combination with regular season games. "That's the honey they use to lure advertisers," says BBDO's Grubbs.

Still, the fact is that the honey wasn't so sweet last year. The NCAA tournament posted a Nielsen National Television Index of 9.2, down from a 9.4 the year before. For the regular season, CBS's numbers dropped 7% to a 4.2 from a 4.5 average rating. NBC-TV also slowed down to a 3.3 from a 3.6, a 9% loss. ABC, on the other hand, made a major gain, up 50% to a 3.6 from a 2.4, largely due to improved clearances among affiliates and the addition of Big Ten games.

Except for ABC, the networks aren't adding games to last year's schedule. ABC will boost its schedule from 13 games last year to 20 this year in order to "create a network level number of games," says Jack O'Hara, director-programming for ABC. Both CBS and NBC are already at or above the 20-game level, with NBC at 20 and CBS at 23 this season. According to Jerry Dominus, vp-television network sales for

CBS, this level of spot inventory is just right for the marketplace: "It's not a glut, [but] neither is it 100% sold out overnight."

Though a network can partially control its fate by holding the line on the number of games, there is little it can do about preemptions by affiliates who run syndicated games. Last year NBC averaged low 80% clearances of affiliates for Saturday afternoons but mid-90% clearances for Sunday games. Richard Hussey, director-programming for NBC Sports, says the low Saturday numbers are due to early network start times to make room for late afternoon golf commitments.

ABC improved its clearance levels to an average 92% from a 86% the year before, one of the significant reasons for its overall ratings increase. CBS has remained in the mid-90% clearance range for the past few years.

Two major national cable networks, ESPN and USA, are going in different directions with college basketball. ESPN is adding 25 games to its total from last year. It'll now play 211 games, 173 of them live. This is in order to add more prime-time West Coast games and to fill the hole in its schedule that resulted from its loss of the National Hockey League package to SportsChannel America.

USA Network, which had run 29 games last year, is cutting back to 20. Rob Correa, manager-program acquisitions for the network, says the additions of expensive prime-time entertainment program reruns, including *Murder, She Wrote* and *Miami Vice*, forced the cutback.

ESPN posted a Nielsen Homevideo

Index 1.7 average rating for the past two seasons with college basketball. This year, the sports network is charging anywhere from \$5,000 to \$7,000 a spot, representing increases of 5% to 10%, depending on the game and the time of year.

USA Network notched a 0.9 number over the last two seasons. Its rates are a slim \$2,500 a spot for this season. One ad agency buyer says USA hasn't been very aggressive when it comes to college basketball, but this year the network is adding a new wrinkle in hopes of stirring advertisers by scheduling a Sunday night series of games.

The conferences with the most interest, such as the Big East, Big Ten, ACC, and SEC, lure ad dollars because they have many of the top rated teams in the country every year. But even these market leaders aren't always able to keep their edge.

The powerful ACC, for instance, last season dropped 17% in audience delivery from the '86-'87 season. The SEC slipped 2%. The Big Ten, however, was up 9%.

Jefferson-Pilot's DuVall says predicting performance levels are never easy: "We are not [traditional] syndication. Everybody knows how *Gilligan's Island* turns out. We are live-event programming, and no one knows what the outcome will be. When teams are doing better, the number are going to grow, pure and simple."

Ratings are also dependent on the number of games. And even the best conferences will be affected by any more expansion. Says CBS's Dominus, "There's a limit as to how far to stretch the rubber band." □

Then come the national cable services (including ESPN, USA Network, FNN-SCORE, superstations and, next year, possibly, NBC). Many, and in ESPN's case most, of those games are cable exclusive, except in the local markets of the two teams, where local broadcasters retain the exclusive rights to the game. Regional cable sports, said the syndicators, generally get last pick.

College on cable: An equal share

The cable king of college basketball carriage continues to be ESPN, which will carry 211 games this season, including 173 regular season contests plus tournament action that includes NCAA regional men's matchups and regional and semi-final women's action. Most of the games will be cable exclusive, except for local blackouts, with ESPN estimating that between 75% and 80% aren't in other syndication packages or blacked out locally.

The season begins with Tennessee-Chattanooga vs. North Carolina on Nov. 18 as part of the Big Apple NIT tripleheader. ESPN will also carry the Hall of Fame Tipoff Classic (Kentucky vs. Duke), the Great Alaska Shootout and the Big Maui Classic in November.

During the regular season, ESPN will feature teams from 29 conferences including more games from western conferences for prime time on the West Coast.

The keystone of the schedule will be ESPN's Monday doubleheader, featuring the Big East and Big Ten. In January and February, ESPN will carry double or tripleheaders on Monday, Wednesday, Thursday and Saturday.

The network will carry selected conference tournament games through March. On March 17, for instance, ESPN will carry nine games, five live and four tape delayed from the NCAA men's first round action. The season ends with the NCAA women's semi-finals on March 31.

Jack Bonanni, senior vice president, of advertising sales for ESPN, said interest in basketball has been "incredible...More and more advertisers want basketball," he said. ESPN is "basically sold out" for the fourth quarter, he said, with double digit increases. That is compounded by a small but still increasing household reach, giving ESPN an even greater increase in ad dollars. The mainstays, such as the automobile dealers, are back this year, said Bonanni, along with Nike and Paine Webber, among others.

Last season, ESPN scored a 1.7 overall rating, and a 1.9 rating in prime time, the fourth consecutive year its prime time ratings rose. "The Big Ten really helped our numbers," said Bonanni.

Mike Patrick, Bob Carpenter, Tim Brando, Roger Twibell, Jim Kelly and Mike Gorman will handle the play-by-play, while Dick Vitale, Larry Conley and Bill Raftery will provide color.

USA Network will carry 20 college games this year, down from the 32 it carried last year. Its season begins with the tournament of

champions the weekend of Dec. 2-3, which will feature Temple, Missouri, Arizona and North Carolina. USA will carry the semi-finals and finals. USA's seven-game December schedule runs on weeknights. Starting in January, the games are scheduled for Sunday night.

FNN/Score will carry 35 regular season college basketball games this season plus the Big South finals, the semi-finals of the Southern Conference and the quarter finals of the ACC. Since FNN has extended its programming into weeknight prime time, Score will only be seen on Friday night, through year's end, and on Saturday and Sunday in 1989. Score carried 56 games last season.

WGN-TV Chicago will carry 26 college basketball games featuring DePaul (16) and Notre Dame (10) games this season. WGN-TV carries the games not picked by NBC-TV.

Black Entertainment Television carries college basketball on Saturday beginning in January. In addition to seven regular season games of black schools, BET will carry games from tournaments and post season action of several black conferences.

The national cable college basketball field may even grow by one. CNBC is scheduled to launch in the first quarter and the service plans to carry sports on the weekends. Several sources among the syndicators report ongoing negotiations with CNBC to carry basketball. CNBC said if basketball is carried, it will only be one of many events, along with interviews, profiles and analysis of all sports. And a spokesman said it was unlikely any current NBC games under contract would appear on CNBC this season.

Syndication: Scarcity vs. exposure

As in college football, there is a concern among syndicators about the overexposure of college basketball, which is affecting the ratings. "There are a lot of paradoxes," said Raycom Sports Inc. Executive Vice President Ken Haines. "The more games out there, the more risk there is of ratings drops and of [carriers] stepping on each other. But the colleges want exposure for recruiting, alumni support and the fans... Lay on top of that dilemma another question: Does TV affect the gate?"

The trend has been toward fewer syndicators, and the consolidation among those remaining continues this fall with a new joint venture between Raycom Sports Inc. and Rasmussen Communications. They will carry a package of Big Ten Conference games, to which Rasmussen holds the broadcast rights. Raycom, holding the rights to ACC, Big Eight, PAC-10 and Metro Conference basketball, has extended by three years its joint venture with Jefferson-Pilot Teleproductions to carry the ACC through the 1993-1994 season.

Raycom and J-P are in the third year of a five-year \$35-million deal for the ACC, which averages out to \$875,000 in rights fees paid

10-24-88

Broadcasting

Coast to coast hoops

ABC Radio Network

NBA: All-Star game and best-of-seven-game NBA championship finals.

ABC-TV

College: 20 regular season games featuring exclusive Big Ten games and championship games from three other major conferences—Southeastern, Pacific-10 and Big Eight.

BET

College: Seven regular season games and tournament action from black college conferences.

CBS-TV

NBA: 15 regular season games and approximately 20 play-off games, depending on how long each best-of-series lasts. **College:** 23 regular season

games including 10 exclusive Big East conference games. Final 33 NCAA tournament games through Final Four and championship.

ESPN

College: 211 games including 173 regular season games featuring teams from 29 conferences and 20 first-round NCAA tournament games.

NBC-TV

College: 19 games including three regular season ACC games and ACC championship, five Notre Dame and four DePaul games.

FNN-SCORE

College: 35 regular season games and

Big South conference tournament finals.

WTBS(TV) Atlanta

NBA: 50 regular season games and 26 playoff games; preseason tournament in Madrid featuring Boston Celtics and three European teams and All-Star Saturday, with Slam Dunk and Long Distance Shootout contests.

USA Network

College: 20 games, featuring December Tournament of Champions hosted by University of North Carolina, Charlotte.

WGN-TV Chicago

College: 26 regular season games from independents DePaul (16 games) and Notre Dame (10 games).

each year to each of the eight ACC teams. That figure is on par with some NBA teams.

But rights figures are not always a good indication of the sport's health on the college level, said Haines, because in the majority of cases, the syndicators have made revenue-sharing agreements with the conferences. And in most cases, Raycom barter advertising time with stations, leaving themselves able to sell time to advertisers in multiple regions. With everyone sharing time and revenue, the fees paid by the broadcasters and cable services do not translate to the whole worth of the product, said Haines. The fees, however, said Haines, are in a "slow rise, maybe a little ahead of inflation."

On the advertising front, teams are joining forces to focus control at the conference level. By selling entire conference broadcast rights to syndicators like Raycom and Creative Sports Marketing, the individual teams assure themselves wider exposure, not only to all the markets in the conference region, but to national broadcast and cable television network audiences—a boon to recruiting, alumni support and fan attendance.

Some conferences control the scarcity themselves. Mike Tranghese, associate commissioner, the Big East conference, which retains its rights, said that if the Big East Television Network were to produce only 10 Syracuse games for the Syracuse market, the result would likely be ratings around 27; on the other hand, producing 20 games for that market, including nonSyracuse conference games, would produce ratings of only nine or 10.

For syndicators, it is the combination of reach and ratings that is attractive to advertisers, said Haines. Because Raycom may be producing several games at one time, advertisers can reach 70% of U.S. homes by purchasing spots across all Raycom's games. "You put a local game on in the local area, and it is almost always going to beat the national game. That is where our success lies. We're able to sell to national advertisers as easily as the networks," he said. To date, Raycom is 75% sold out, with advertisers including Anheuser Busch, General Motors, Apple Computers, Piedmont Airlines, Ford Motor Co. and Pepsi.

Radio: Team exposure

ABC Radio's new two-year contract to carry the NBA All Star Game and the championship series is the only radio network carrying the NBA. It will be the third year ABC has carried the All Star game and the fifth time it has carried the finals. On the local level, most teams will get full season carriage but no rights fee for their games.

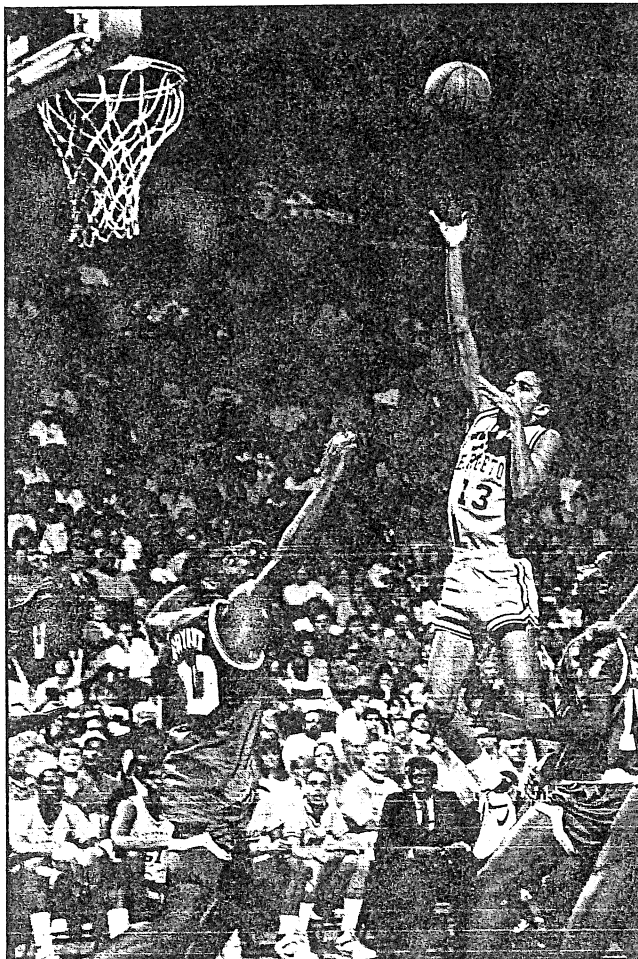
For the eighth consecutive year, CBS Radio will broadcast the NCAA regional semifinals and finals, the "Final Four" and the championship game. The network's NCAA coverage, which begins on March 23, is produced in conjunction with Host Communications, Lexington, Ky. Tentatively scheduled announcers for this year's games include Marty Brennaman, Quinn Buckner, Ted Davis, Ron Franklin, Caywood Ledford, Ted Robinson and John Rooney. The national championship will be broadcast live on April 3 from the Kingdome in Seattle. CBS coverage will also include three women's games: two national semi-finals on March 31 and the national championship on April 2.

In addition to the games, CBS will present two call-in talk shows: Selection Sunday, an NCAA playoff preview scheduled to air on March 12, and the Eve of the Final Four, set for March 31.

Mutual Broadcasting will provide 12 major college basketball games over nine weeks, with doubleheaders making up the last three weeks. The network's broadcasts, which are scheduled to begin Jan. 8, are negotiated in agreements with the individual colleges and not with the NCAA. Coverage will include Tony Roberts doing play-by-play and former NBA player Bob Lanier providing color.

College basketball on local radio and on regional radio networks, however, is healthy. A total of 243 games played by teams in the Missouri Valley conference, for example, will be heard on local radio stations this season; local radio will carry 240 Sunbelt Conference games and 187 Big West (formerly the Pacific Coast Athletic Association) games.

This "Special Report" was written by Peter Lambert, Matt Stump and Rich Brown.



Georgetown University's Charles Smith puts one up against Seton Hall.