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FIS SNOWBOARD WORLD CUP 2017/18

TV Media Evaluation – Event Summary



Expertise by Nielsen Sports

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INTRODUCTION

STUDY BRIEF

SPONSORS	---
ANALYSIS PERIOD	2017/18 Season
EVENT	FIS Snowboard World Cup 2017/18 (M/L)
MARKETS	Austria, Canada, China, Finland, France, Germany, Italy, Japan, Netherlands, Norway, Russia, Slovenia, South Korea, Spain, Sweden, Switzerland, United Kingdom, USA
TV PROGRAMME TYPES	Live, Delayed, Relive, Highlights, Sport Magazines, Magazines, News
AUDIENCE SOURCES	Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup Adults 3+ Estimations by Nielsen Sports



MANAGEMENT SUMMARY

MANAGEMENT SUMMARY

FIS Snowboard World Cup

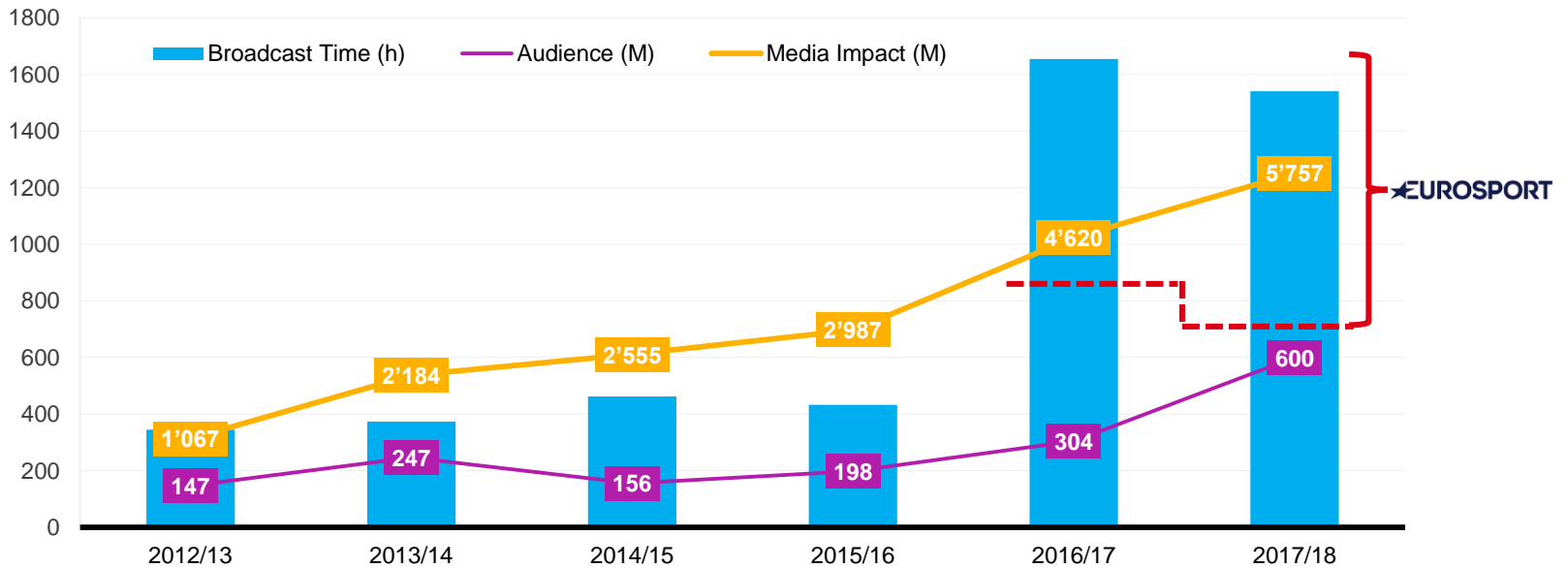
**SNOWBOARD
WORLD CUP**

FIS SNOWBOARD
WORLD CUP 2017/18

	LIVE	NON-LIVE	TOTAL
CUMULATIVE AUDIENCE* (M)	17,85	581,94	599,80
BROADCAST TIME (hh:mm:ss)	342:26:40	1198:26:33	1540:53:14
NUMBER OF BROADCASTS (#)	391	3.990	4.381
EVENT IMPRESSIONS (M)	1.512,43	4.245,01	5.757,44
VISIBILITY (hh:mm:ss)	---	---	---
NUMBER OF SEQUENCES (#)	---	---	---
SPONSORSHIP IMPRESSIONS (M)	---	---	---
100% MEDIA EQUIVALENCY (€)	---	---	---
QI MEDIA VALUE (€)	---	---	---
AVERAGE SEQUENCE DURATION (s)	---	---	---

MANAGEMENT SUMMARY

Broadcast coverage trend (broadcast hours, cumulative audience and media impact)



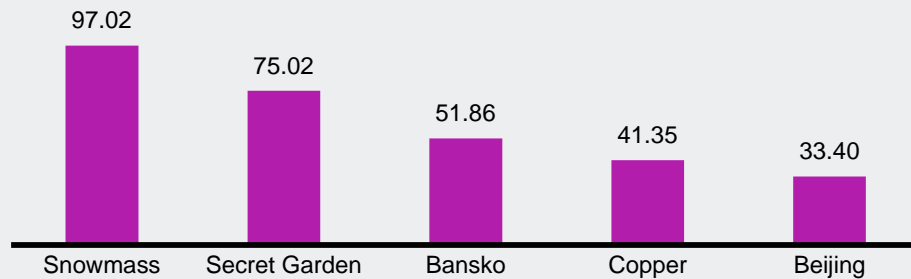
- FIS Snowboard World Cup 2017/18 reports a slight drop in the 18 countries that were monitored for broadcast coverage compared to the 2016/17 season. Notable markets responsible for the decline are Austria, Italy and Spain, whereas countries such as the USA, Sweden and Finland report growing broadcast coverage.
- Eurosport increased its overall broadcasting time and thus features a greater share of total broadcast coverage compared to other channels.
- It is important to note that although overall broadcast coverage time declined, the cumulative audience, and with it media impact increased considerably, growing by 97% and 25% respectively.

MANAGEMENT SUMMARY

Media Monitoring

LIVE AUDIENCE BY VENUE (TOP 5) – CUMULATIVE AUDIENCE

(M)



- The Halfpipe and Slopestyle races in Snowmass lifted the venue to top rank for cumulative live audience with over 97M viewers. Other notable events were the Secret Garden Halfpipe competitions and the Parallel GS and Snowboardcross competitions in Bansko.
- The Top 5 venues in terms of live (cumulative) audience for the FIS Snowboard World Cup 2017/18 accumulate for over 40% of total audience.
- China and Germany remain top-ranked (1st and 2nd) in event coverage. Coverage in Japan made a huge leap forward, moving the country from 16th to 3rd overall position in total event impressions. To a large extent, this growth can be explained by extended broadcast coverage on NHK and TBS.
- Halfpipe in Secret Garden and the Big Air event in Beijing generated the greatest media impact for single events with 721M and 641M event impressions. This represents almost 24% of the global impact. By comparison, all Parallel Slalom/GS competitions together generated a similar share of total media impact this season.

*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+/Estimations by Nielsen Sports TV Media Evaluation - FIS Snowboard World Cup 2017/18

MARKET RANKING – EVENT IMPRESSIONS

(M)

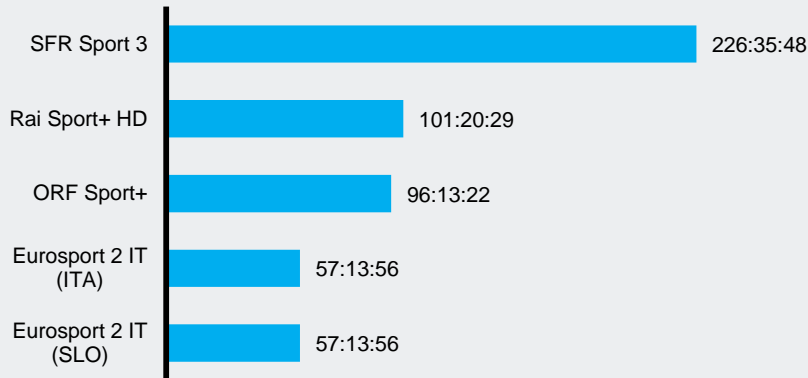
	NUMBER OF BROADCASTS	
China	1'587	292
Germany	1'542	364
Japan	564	139
Austria	438	508
USA	365	72
Italy	293	237
Slovenia	159	242
France	143	605
Spain	128	158
Netherlands	98	357
South Korea	93	46
Switzerland	83	449
Russia	81	152
United Kingdom	61	118
Canada	46	60
Sweden	44	156
Finland	19	152
Norway	14	274

MANAGEMENT SUMMARY

Media Monitoring

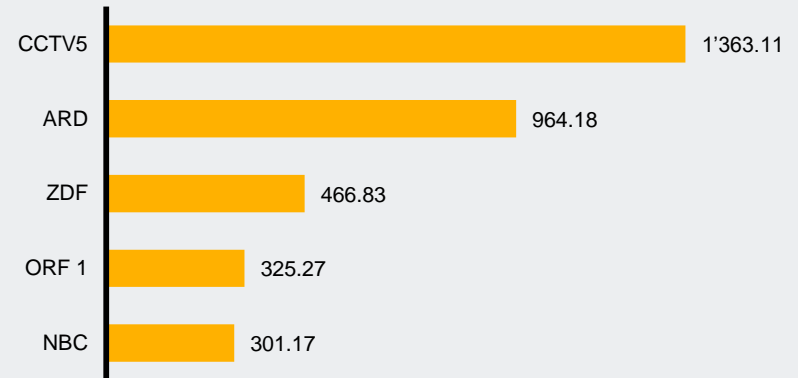
CHANNEL RANKING BY BROADCAST TIME (TOP 5)

(hh:mm:ss)



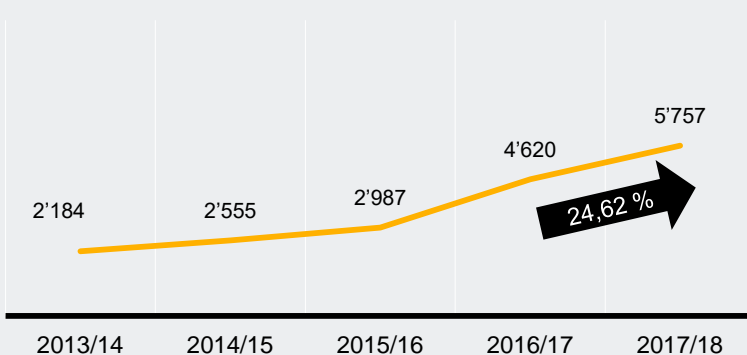
CHANNEL RANKING BY EVENT IMPRESSIONS (TOP 5)

(M)



WORLD CUP EVENT IMPRESSIONS TREND

(M)



- As in the 2016/17 season, China again contributes a huge portion of media impact and audience, for the major part by CCTV5, which aired over 27h (10h more than 2016/17) of Snowboard broadcasting, generating 1,36bn event impressions and over 73M cumulated viewers.
- 60% of the media impact was generated by the top 5 channels: CCTV5, ARD, ZDF, ORF1 and NBC, by order of importance.
- These top 5 channels also contributed 35% of the cumulative audience. This is 13% less than what the top 5 Channels contributed last season.
- In the 2017/18 season, cumulative audience and media impact of live coverage increased by 256% and 246%. As a result, delayed coverage no longer carries more weight than live coverage.



RESULT PRESENTATION

- Media Monitoring

MEDIA MONITORING

By Country

**SNOWBOARD
WORLD CUP**

COUNTRY	NUMBER OF BROADCASTS (#)	CUMULATIVE AUDIENCE* (M)	BROADCAST TIME (hh:mm:ss)	ACTUAL PLAYING TIME (hh:mm:ss)	EVENT IMPRESSIONS (M)
Austria	508	43,56	173:39:16	143:22:00	438,46
Canada	60	1,80	5:00:09	3:38:25	46,41
China	292	100,48	65:39:56	61:19:11	1.587,00
Finland	152	6,05	77:28:21	73:09:42	18,65
France	605	25,20	279:52:57	260:31:47	142,83
Germany	364	121,12	75:22:56	66:21:24	1.541,81
Italy	237	12,90	173:29:53	160:00:57	292,78
Japan	139	154,78	7:17:04	4:56:01	563,65
Netherlands	357	13,50	111:31:27	104:52:49	97,98
Norway	274	4,02	60:13:45	54:39:37	14,46
Russia	152	14,89	68:56:20	65:05:12	81,41
Slovenia	242	9,27	89:16:36	83:28:34	158,95

MEDIA MONITORING

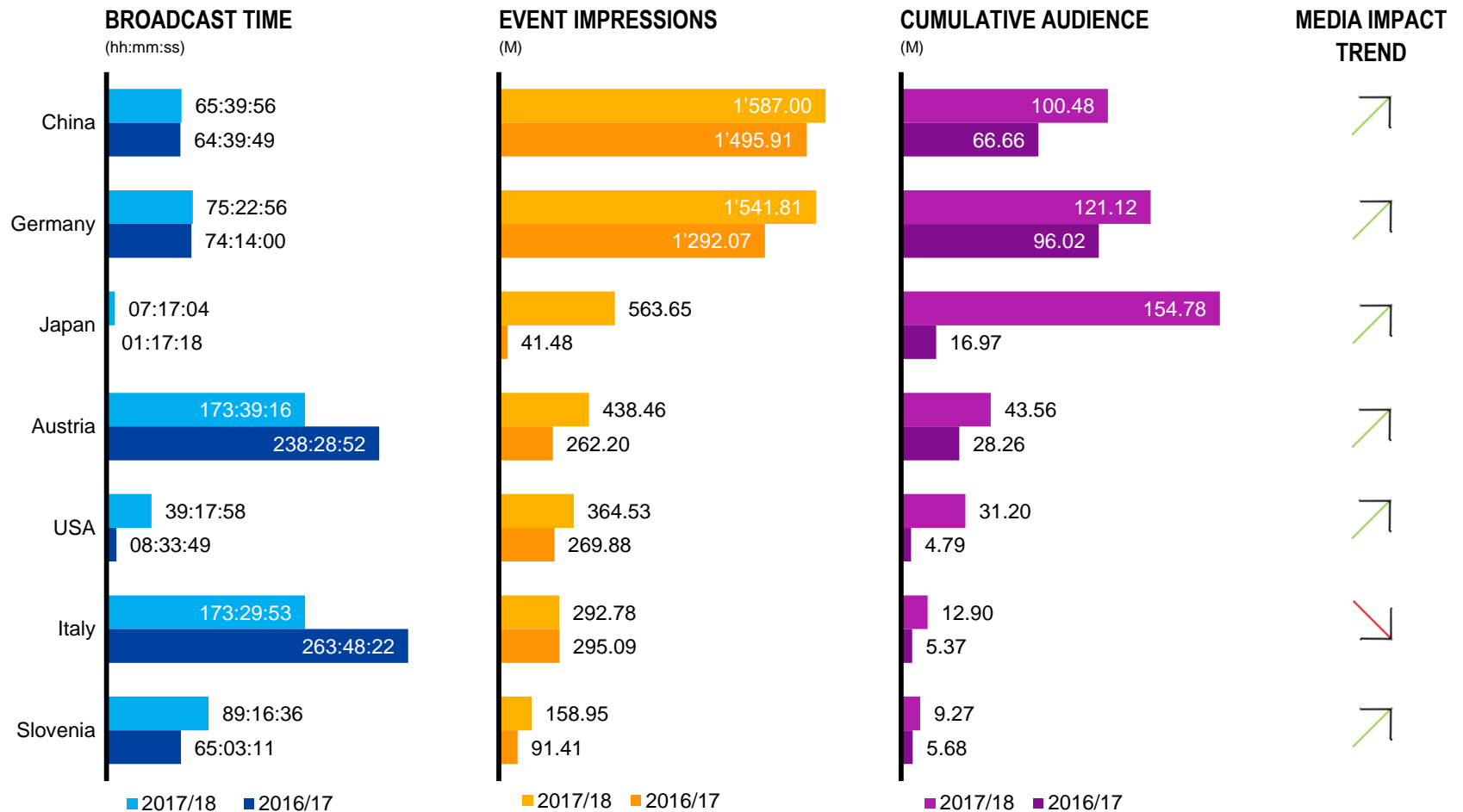
By Country

**SNOWBOARD
WORLD CUP**

COUNTRY	NUMBER OF BROADCASTS (#)	CUMULATIVE AUDIENCE* (M)	BROADCAST TIME (hh:mm:ss)	ACTUAL PLAYING TIME (hh:mm:ss)	EVENT IMPRESSIONS (M)
South Korea	46	12,51	14:41:01	13:01:43	92,55
Spain	158	28,11	92:40:10	86:28:16	128,04
Sweden	156	1,71	79:56:26	73:44:15	44,41
Switzerland	449	8,27	61:27:38	51:52:33	82,89
United Kingdom	118	10,43	65:01:21	61:32:25	60,63
USA	72	31,20	39:17:58	31:25:39	364,53
TOTAL	4.381	599,80	1540:53:14	1399:30:32	5.757,44

MEDIA MONITORING

By Country Trend (Top 7 by Event Impressions 2017/18)



*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+/Estimations by Nielsen Sports
TV Media Evaluation - FIS Snowboard World Cup 2017/18

MEDIA MONITORING

By Country Trend

**SNOWBOARD
WORLD CUP**

COUNTRY	2017/18			2016/17		
	CUMULATIVE AUDIENCE*	BROADCAST TIME	EVENT IMPRESSIONS	CUMULATIVE AUDIENCE*	BROADCAST TIME	EVENT IMPRESSIONS
	(M)	(hh:mm:ss)	(M)	(M)	(hh:mm:ss)	(M)
Austria	43,56	173:39:16	438,46	28,26	238:28:52	262,20
Canada	1,80	5:00:09	46,41	5,16	12:18:27	115,27
China	100,48	65:39:56	1.587,00	66,66	64:39:49	1.495,91
Finland	6,05	77:28:21	18,65	1,00	56:36:51	7,77
France	25,20	279:52:57	142,83	14,76	270:48:37	146,16
Germany	121,12	75:22:56	1.541,81	96,02	74:14:00	1.292,07
Italy	12,90	173:29:53	292,78	5,37	263:48:23	295,09
Japan	154,78	7:17:04	563,65	16,97	1:17:18	41,48
Netherlands	13,50	111:31:27	97,98	5,83	114:53:55	49,06
Norway	4,02	60:13:45	14,46	12,26	52:57:08	41,93
Russia	14,89	68:56:20	81,41	11,19	94:11:51	109,33
Slovenia	9,27	89:16:36	158,95	5,68	65:03:11	91,41
South Korea	12,51	14:41:01	92,55	-	-	-

*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+/Estimations by Nielsen Sports
TV Media Evaluation - FIS Snowboard World Cup 2017/18

MEDIA MONITORING

By Country Trend

**SNOWBOARD
WORLD CUP**

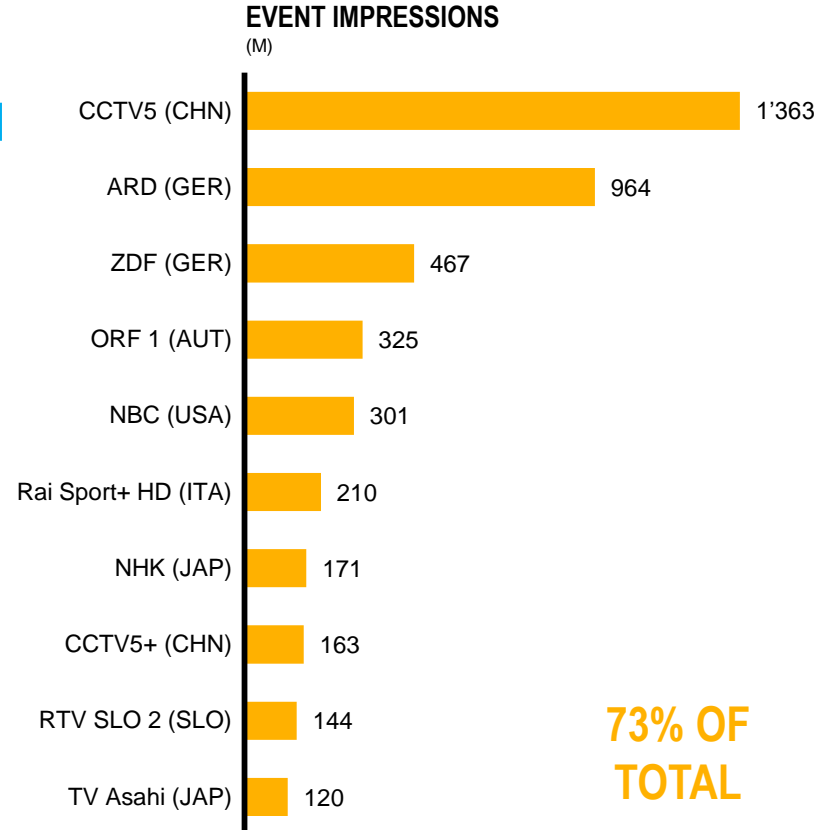
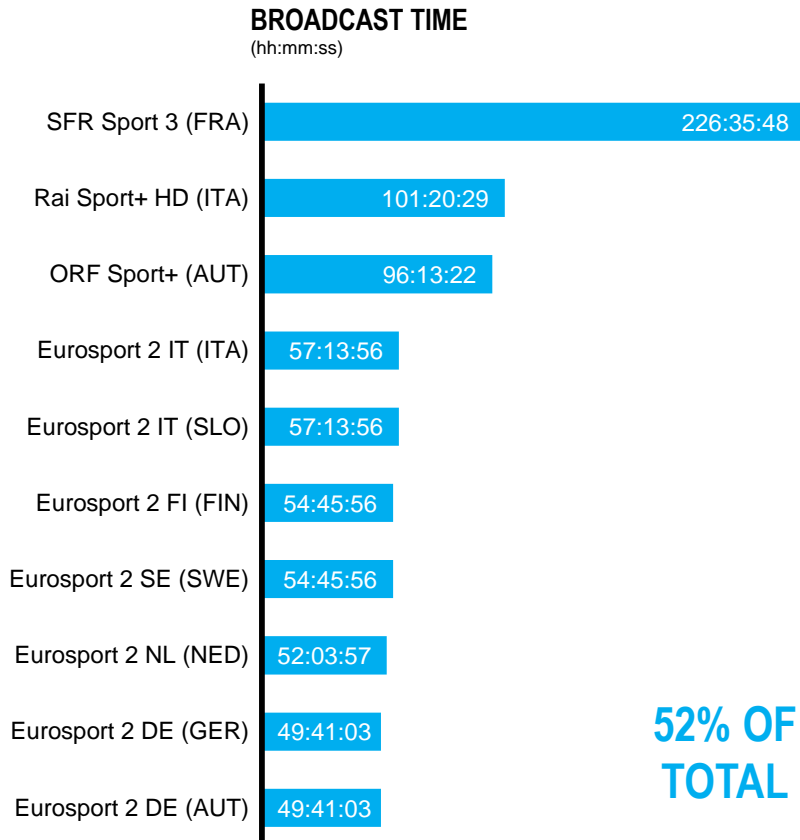
COUNTRY	2017/18			2016/17		
	CUMULATIVE AUDIENCE*	BROADCAST TIME	EVENT IMPRESSIONS	CUMULATIVE AUDIENCE*	BROADCAST TIME	EVENT IMPRESSIONS
	(M)	(hh:mm:ss)	(M)	(M)	(hh:mm:ss)	(M)
Spain	28,11	92:40:10	128,04	13,46	156:39:12	212,18
Sweden	1,71	79:56:26	44,41	3,83	54:25:53	43,75
Switzerland	8,27	61:27:38	82,89	7,95	76:34:11	81,62
United Kingdom	10,43	65:01:21	60,63	5,08	49:51:52	64,73
USA	31,20	39:17:58	364,53	4,79	8:33:50	269,88
TOTAL	599,80	1540:53:14	5.757,44	304,25	1655:23:21	4.619,84

*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+/Estimations by Nielsen Sports
TV Media Evaluation - FIS Snowboard World Cup 2017/18

MEDIA MONITORING

By Channel (Top 10)

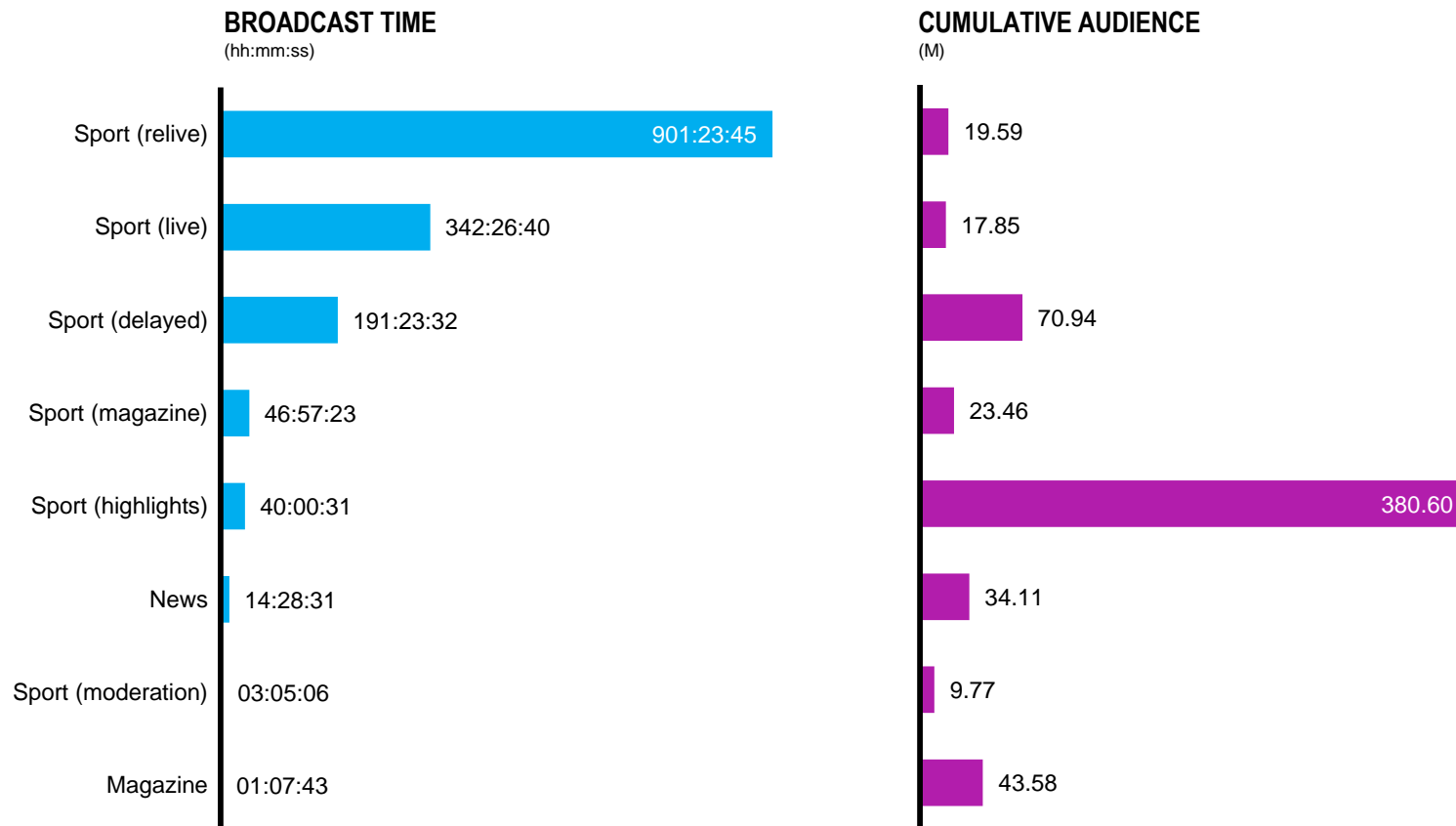
**SNOWBOARD
WORLD CUP**



MEDIA MONITORING

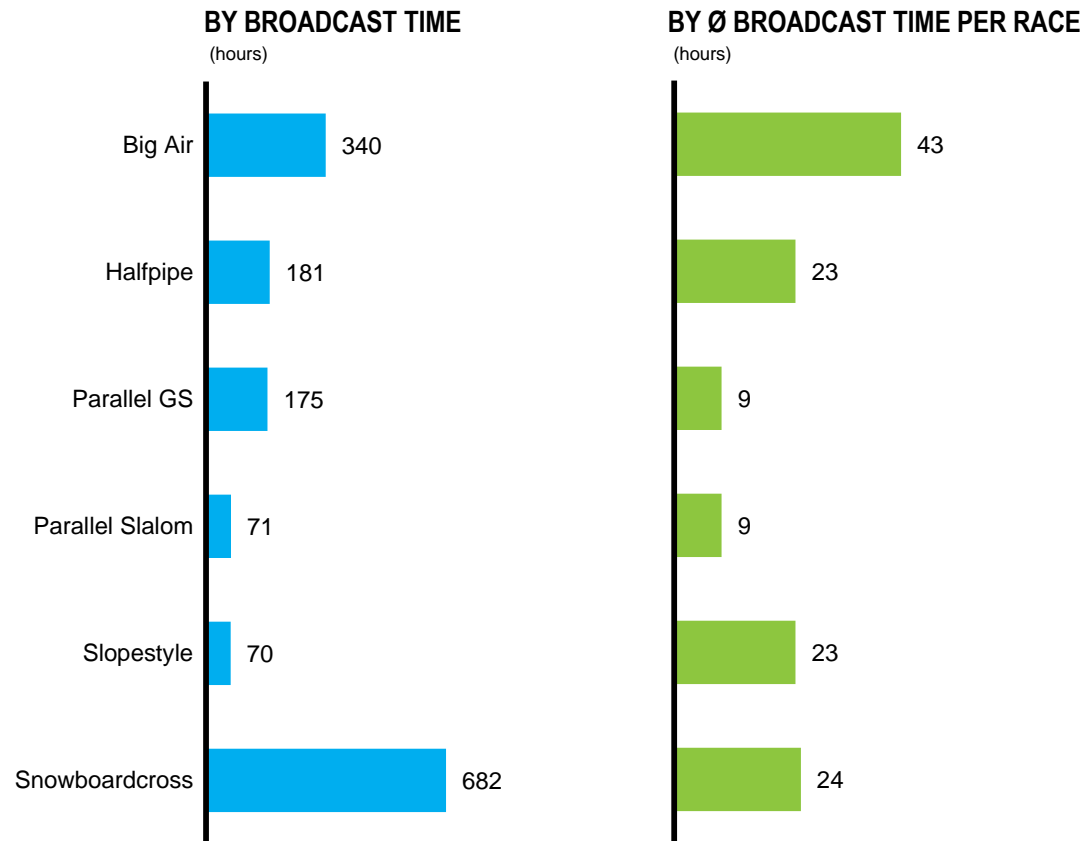
By Programme Type

**SNOWBOARD
WORLD CUP**



MEDIA MONITORING

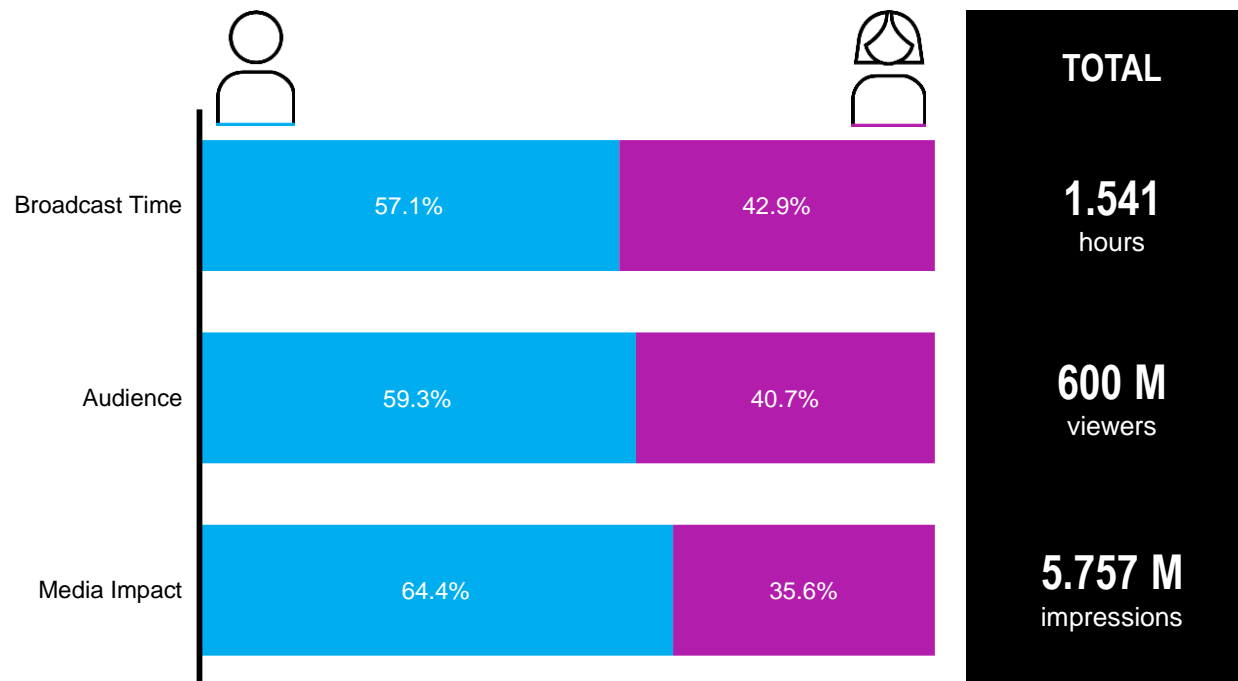
Event Ranking: Slalom and Giant Slalom are once again the dominating disciplines regarding broadcast time.



MEDIA MONITORING

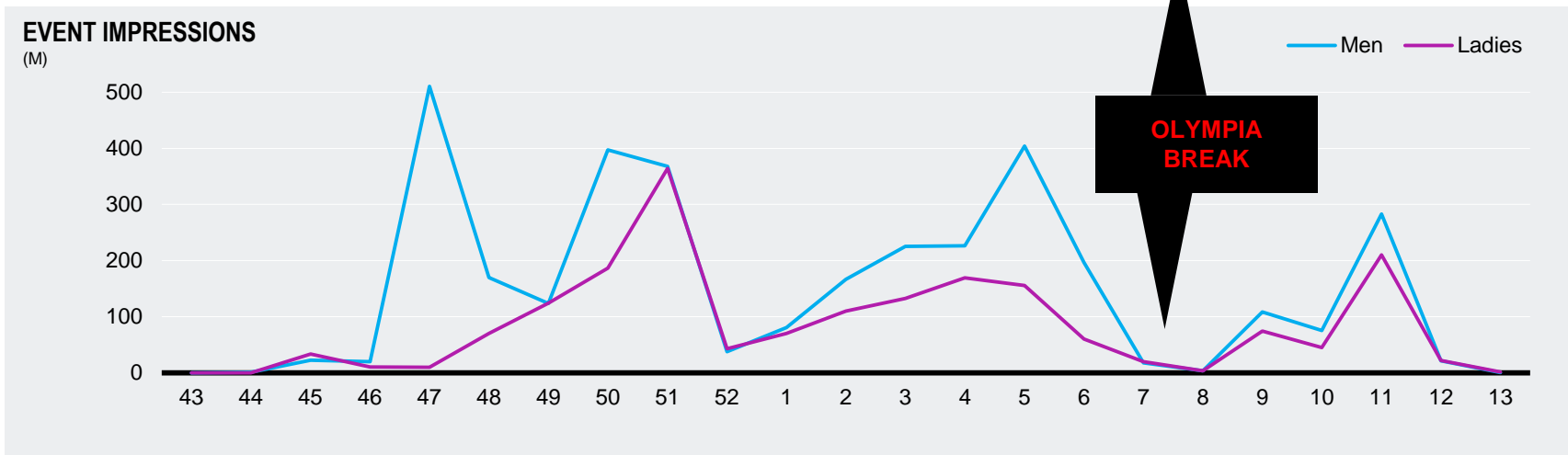
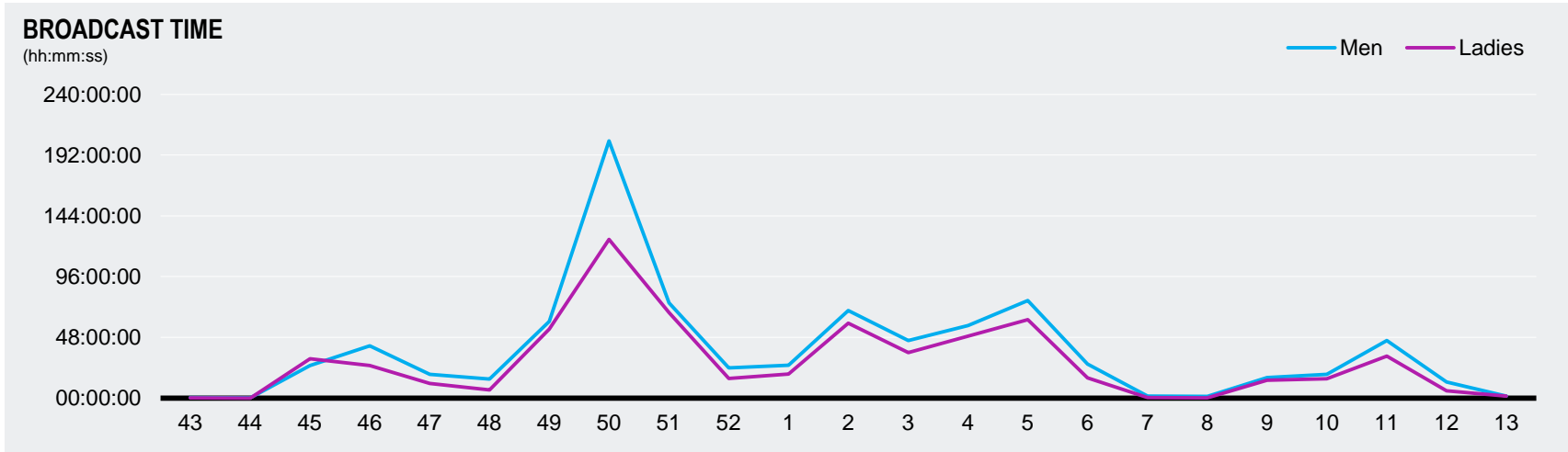
Comparison of Genders

**SNOWBOARD
WORLD CUP**



MEDIA MONITORING

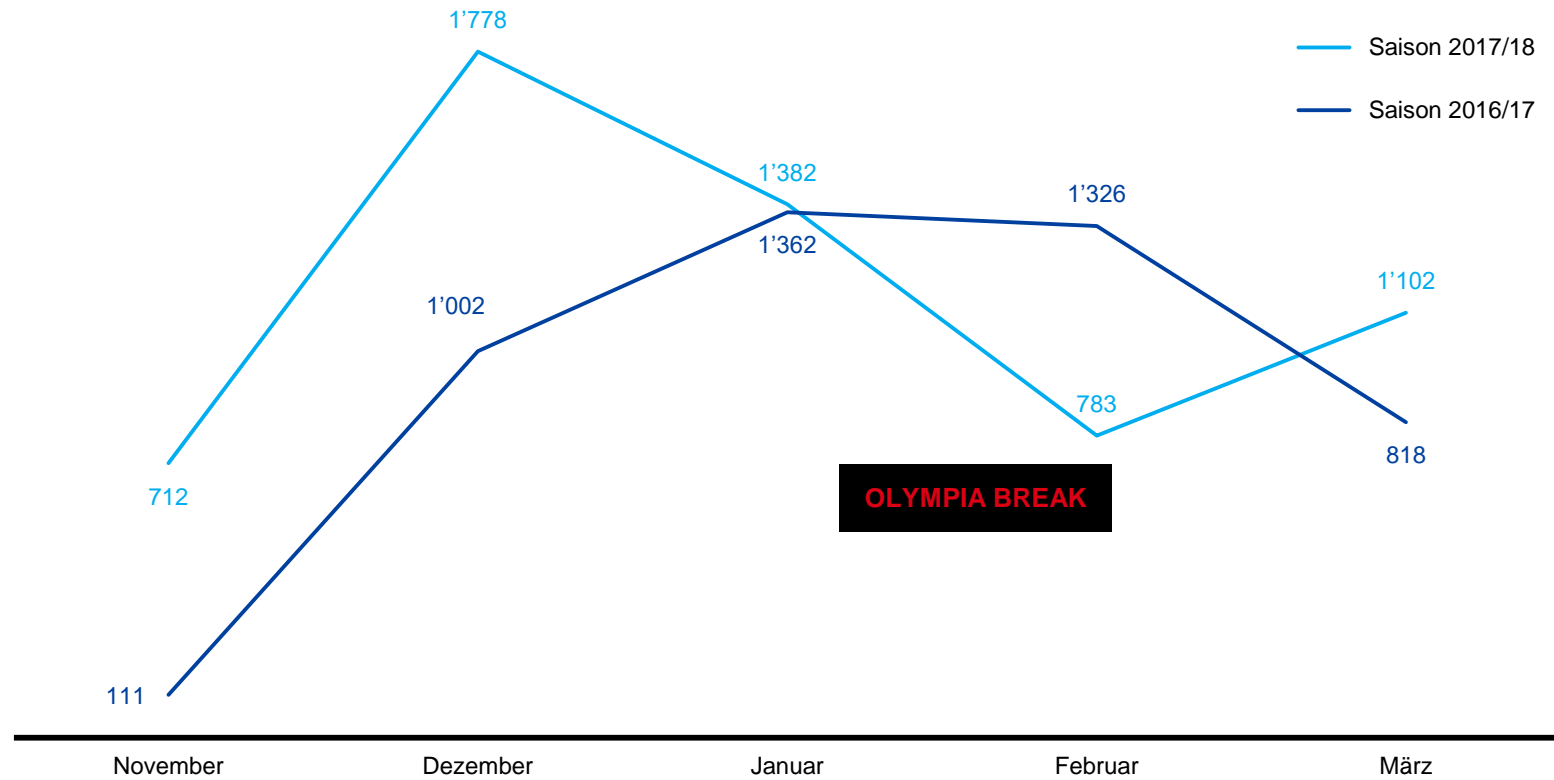
Coverage Trend by Week



MEDIA MONITORING

Season Comparison by Event Impression

**SNOWBOARD
WORLD CUP**



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