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FIS FREESTYLE SKI WORLD CUP 2017/18

TV Media Evaluation – Event Summary



**FREESTYLE SKI
WORLD CUP**



Audi FIS Ski Cross
World Cup



Expertise by Nielsen Sports

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INTRODUCTION

STUDY BRIEF

SPONSORS

Audi

ANALYSIS PERIOD

2017/18 Season

EVENT

FIS Freestyle Ski World Cup 2017/18 (M/L)

MARKETS

Austria, Canada, China, Finland, France, Germany, Italy, Norway, Russia, Slovenia, South Korea, Spain, Sweden, Switzerland, United Kingdom, USA

TV PROGRAMME TYPES

Live, Delayed, Relive, Highlights, Sport Magazines, Magazines, News

AUDIENCE SOURCES

Médiametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup | Adults 3+ | Estimations by Nielsen Sports



MANAGEMENT SUMMARY

MANAGEMENT SUMMARY

FIS Freestyle Ski World Cup

**FREESTYLE SKI
WORLD CUP**

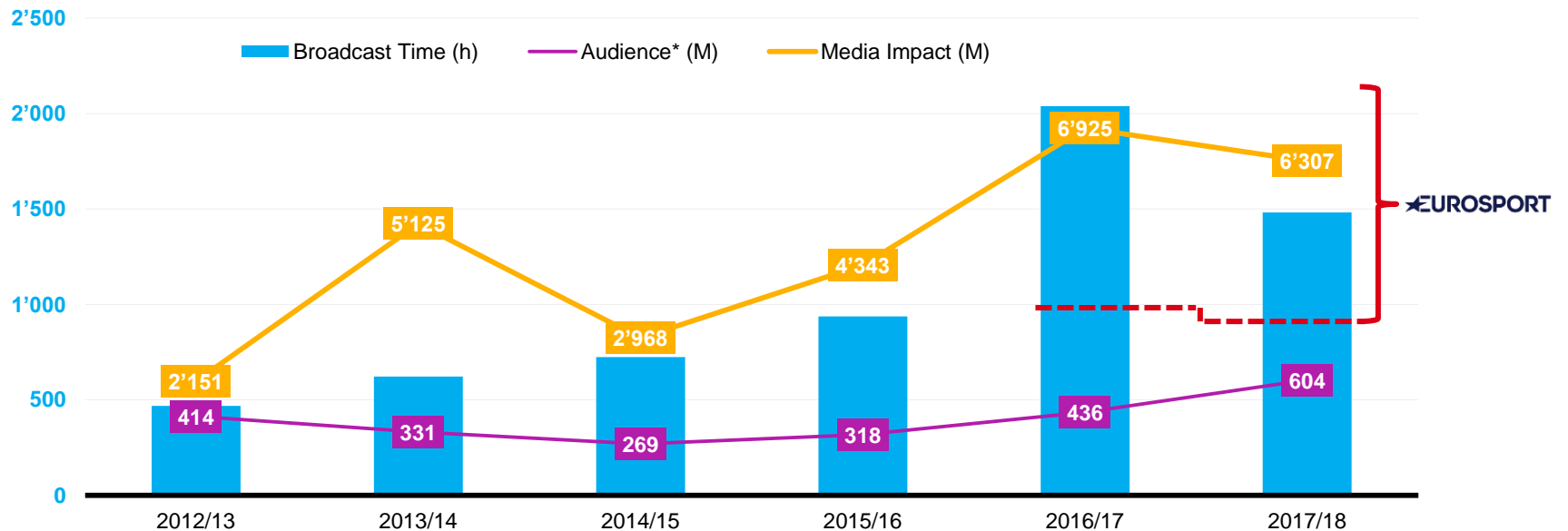
FIS FREESTYLE SKI
WORLD CUP 2017/18



	LIVE	NON-LIVE	TOTAL
CUMULATIVE AUDIENCE* (M)	16,98	587,15	604,12
BROADCAST TIME (hh:mm:ss)	321:21:44	1160:51:15	1482:13:00
NUMBER OF BROADCASTS (#)	364	3.749	4.113
EVENT IMPRESSIONS (M)	1.372,37	4.934,83	6.307,20
VISIBILITY (hh:mm:ss)	79:10:33	178:17:42	257:28:14
NUMBER OF SEQUENCES (#)	47.879	108.016	155.895
SPONSORSHIP IMPRESSIONS (M)	252,50	297,75	550,25
100% MEDIA EQUIVALENCY (€)	6.052.079	3.689.871	9.741.950
QI MEDIA VALUE (€)	1.337.437	830.428	2.167.864
AVERAGE SEQUENCE DURATION (s)	5,95	5,94	5,95

MANAGEMENT SUMMARY

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



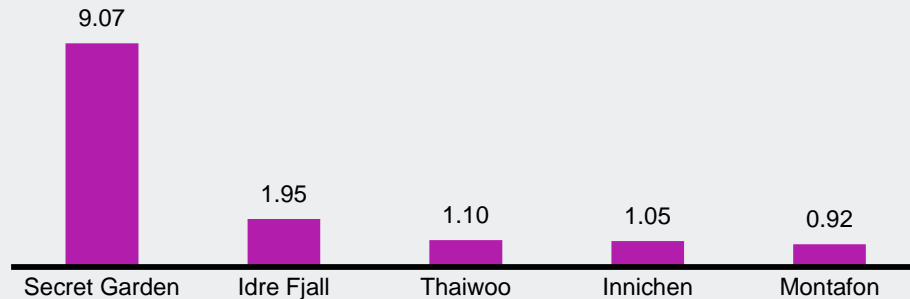
- Total coverage of the FIS SKI Freestyle World Cup 2017/18 amounts to almost 1.500 broadcast hours within the 16 analysed markets, achieving a record cumulative audience of over 600M viewers, most of which were reached in China (32%) and Japan (19%).
- Compared to previous years, the World Cup shows contradicting developments at first sight, since the rapidly increasing audience comes in parallel with a decrease in both broadcast time and event impressions.
- Analysing more in detail, the audience development is almost exclusively to be attributed to China (+88M), Japan (+98M) and Russia (+31M), leading to a 39% increase in cumulative audience despite losing 60M in Germany. Since most of the additional audience was reached through short news and magazine features, media impact could not profit proportionally from this positive development.
- The decrease in broadcast time is distributed rather equally among the European countries, showing that Pan-European broadcaster Eurosport is responsible for that development. Broadcast time on this network decreased by over 500 hours, luckily without a significant impact on the event's media impact.

MANAGEMENT SUMMARY

Media Monitoring

VENUE RANKING (TOP 5) BY CUMULATIVE AUDIENCE* LIVE COVERAGE

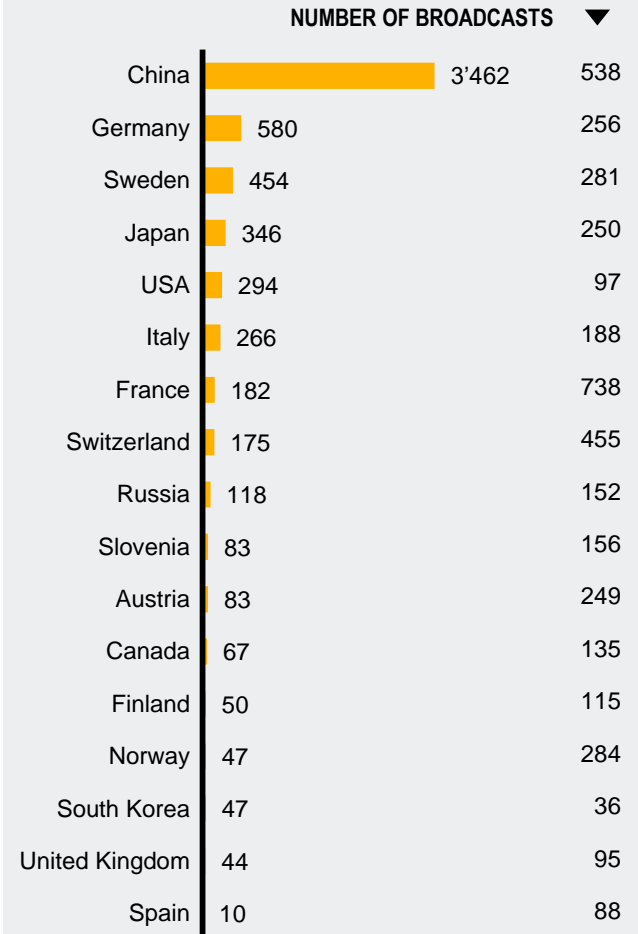
(M)



- Explaining the negative development as regards media impact can be done from two perspectives: analysing the markets, the starkest decreases can be registered in Germany (-552M) and Sweden (-225M). From an event perspective it is obvious that the positive evolution registered for Aerials events (+854M) has not been strong enough to fully compensate the huge decrease the Ski Cross event has undergone, which lost more than half of its media impact (-1.477M). The decrease for Ski Cross events must at least partially be attributed to the difficult weather conditions and the subsequent cancellations of events early in the season.
- The Ski Cross competitions now only represents 21% of the overall Ski Freestyle media impact, as opposed to 40% in the previous season.
- Leading by far the venue ranking by live audience, the Chinese winter sports resort Secret Garden distributes the live audience rather equally among the three hosted competitions – two aerials and one halfpipe competition. Not surprisingly, the home market with national free-to-air channel CCTV5 contributes most to this live audience.

MARKET RANKING – EVENT IMPRESSIONS

(M)

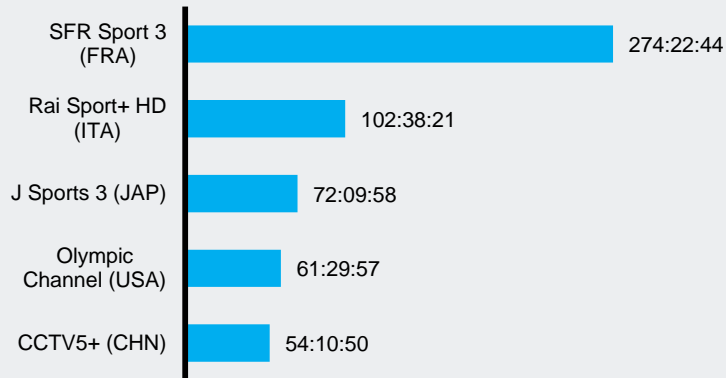


MANAGEMENT SUMMARY

Media Monitoring

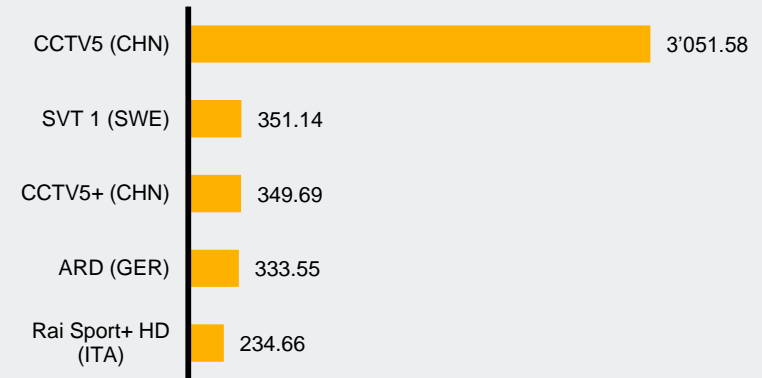
CHANNEL RANKING BY BROADCAST TIME (TOP 5)

(hh:mm:ss)



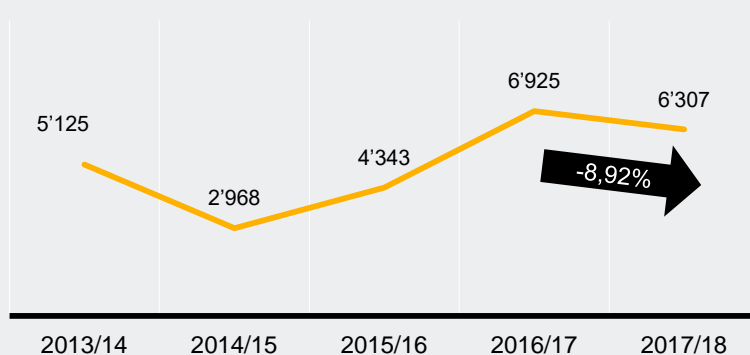
CHANNEL RANKING BY EVENT IMPRESSIONS (TOP 5)

(M)



WORLD CUP EVENT IMPRESSIONS TREND

(M)



- The country ranking by media impact shows the primordial importance of the Chinese market, where some Freestyle events capitalize on valuable broadcasts on national free-to-air channel CCTV5.
- Combining extensive live & delayed coverage on two distinct broadcasters (SFR Sport and Eurosport) and 166 features of secondary coverage, France can clearly be defined as a high potential market. However, the two aforementioned pay-tv broadcasters clearly lack to develop notable value.
- Another appreciable development can be observed in Japan, where secondary coverage exploded both in regards to the number of broadcasts, their total duration and subsequently also their media impact. Next to the home events in Tazawako, secondary coverage seems to show a clear focus on events on the American continent.

*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+/Estimations by Nielsen Sports

TV Media Evaluation - FIS Freestyle Ski World Cup 2017/18



RESULT PRESENTATION

- **Media Monitoring**
- Media Monitoring – Focus Ski Cross
- Media Monitoring – Focus Cross Alps Tour
- Sponsorship Analysis

MEDIA MONITORING

By Country

**FREESTYLE SKI
WORLD CUP**

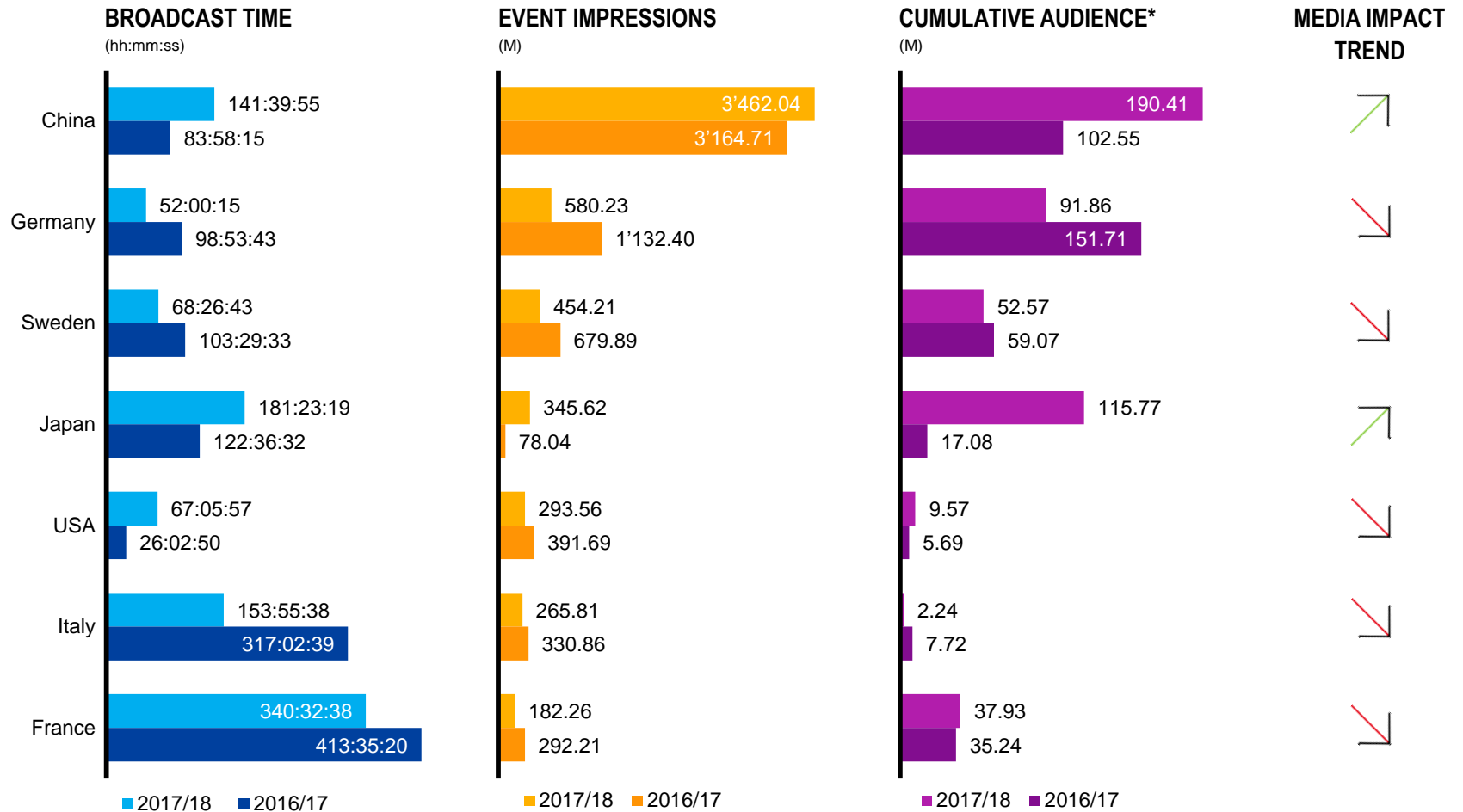
COUNTRY0	NUMBER OF BROADCASTS (#)	CUMULATIVE AUDIENCE* (M)	BROADCAST TIME (hh:mm:ss)	ACTUAL PLAYING TIME (hh:mm:ss)	EVENT IMPRESSIONS (M)
Austria	249	7,50	89:39:13	72:27:25	82,92
Canada	135	6,76	08:13:57	05:24:23	66,70
China	538	190,41	141:39:55	134:09:29	3.462,04
Finland	115	3,92	50:49:50	47:38:18	50,06
France	738	37,93	340:32:38	310:34:00	182,26
Germany	256	91,86	52:00:15	44:47:32	580,23
Italy	188	2,24	153:55:38	139:55:11	265,81
Japan	250	115,77	181:23:19	119:41:00	345,62
Norway	284	10,03	45:45:52	41:36:08	47,47
Russia	152	36,92	47:55:53	44:35:55	117,84
Slovenia	156	4,16	65:14:28	60:06:59	83,11
South Korea	36	13,46	12:37:38	11:07:10	46,52
Spain	88	4,17	37:58:56	36:04:06	9,97
Sweden	281	52,57	68:26:43	60:25:18	454,21
Switzerland	455	12,54	73:56:27	64:34:43	175,17
United Kingdom	95	4,29	44:56:22	42:29:00	43,70
USA	97	9,57	67:05:57	57:24:44	293,56
TOTAL	4.113	604,12	1482:13:01	1293:01:22	6.307,20

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

MEDIA MONITORING

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

**FREESTYLE SKI
WORLD CUP**



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

MEDIA MONITORING

By Country Trend

**FREESTYLE SKI
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	7,50	89:39:13	82,92	5,34	156:25:17	113,46
Canada	6,76	08:13:57	66,70	8,31	18:20:47	152,63
China	190,41	141:39:55	3.462,04	102,55	83:58:15	3.164,71
Finland	3,92	50:49:50	50,06	0,57	92:29:46	26,85
France	37,93	340:32:38	182,26	35,24	413:35:20	292,21
Germany	91,86	52:00:15	580,23	151,71	98:53:43	1.132,40
Italy	2,24	153:55:38	265,81	7,72	317:02:39	330,86
Japan	115,77	181:23:19	345,62	17,08	122:36:32	78,04
Norway	10,03	45:45:52	47,47	7,77	83:35:11	135,07
Russia	36,92	47:55:53	117,84	5,94	129:42:22	79,30
Slovenia	4,16	65:14:28	83,11	11,39	108:28:19	170,14
South Korea	13,46	12:37:38	46,52	-	-	-
Spain	4,17	37:58:56	9,97	0,41	108:26:56	12,74

MEDIA MONITORING

By Country Trend

**FREESTYLE SKI
WORLD CUP**

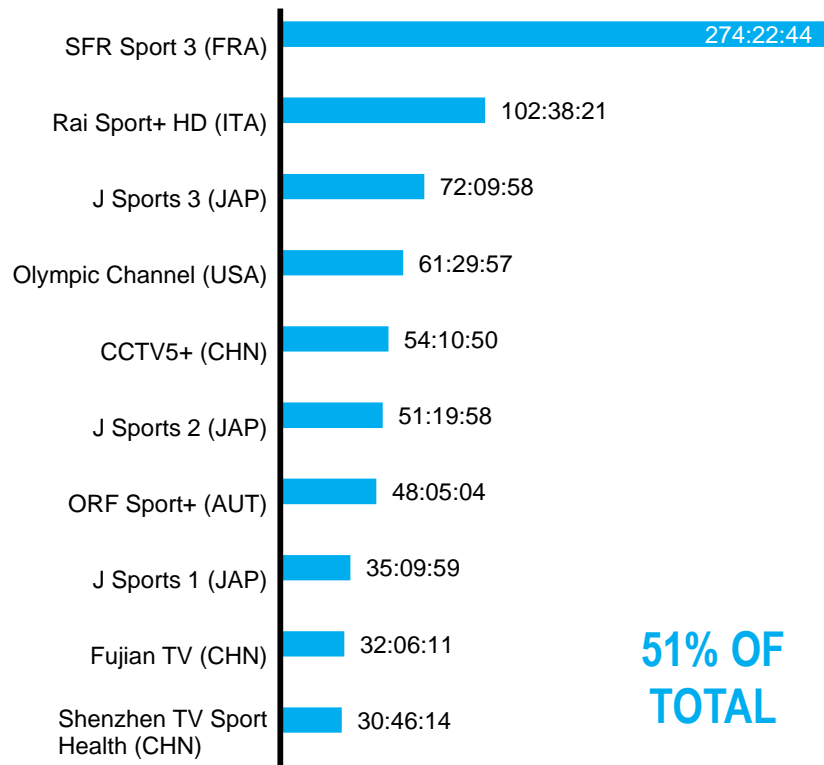
COUNTRY	2017/18			2016/17		
	CUMULATIVE AUDIENCE*	BROADCAST TIME	EVENT IMPRESSIONS	CUMULATIVE AUDIENCE*	BROADCAST TIME	EVENT IMPRESSIONS
	(M)	(hh:mm:ss)	(M)	(M)	(hh:mm:ss)	(M)
Sweden	52,57	68:26:43	454,21	59,07	103:29:33	679,89
Switzerland	12,54	73:56:27	175,17	17,01	94:22:28	131,34
United Kingdom	4,29	44:56:22	43,70	0,39	82:03:25	32,99
USA	9,57	67:05:57	293,56	5,69	26:02:50	391,69
TOTAL	604,12	1482:13:01	6.307,20	436,39	2040:06:00	6.924,70

MEDIA MONITORING

By Channel (Top 10)

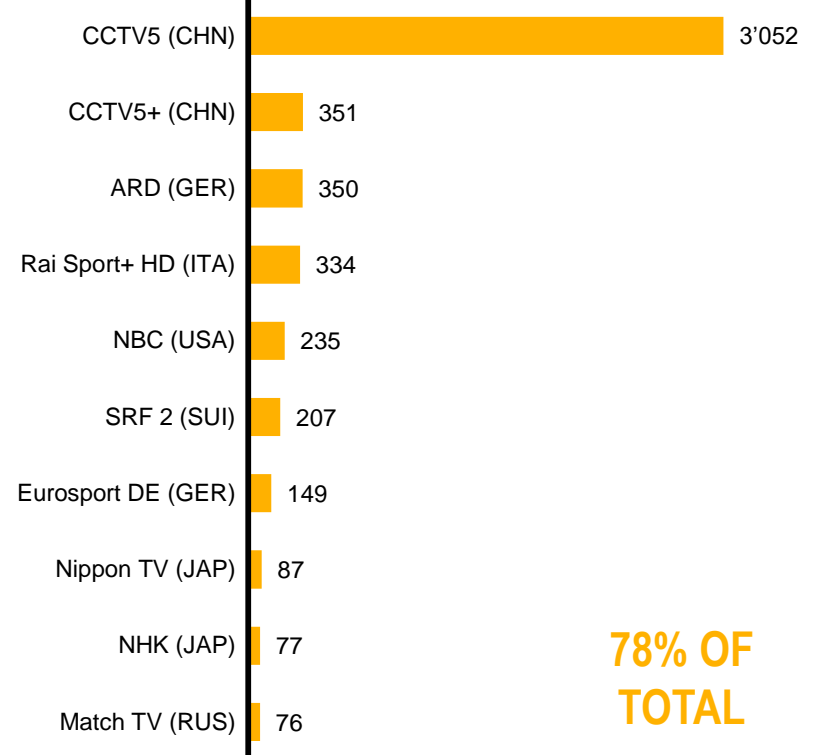
**FREESTYLE SKI
WORLD CUP**

BROADCAST TIME (hh:mm:ss)



**51% OF
TOTAL**

EVENT IMPRESSIONS (M)

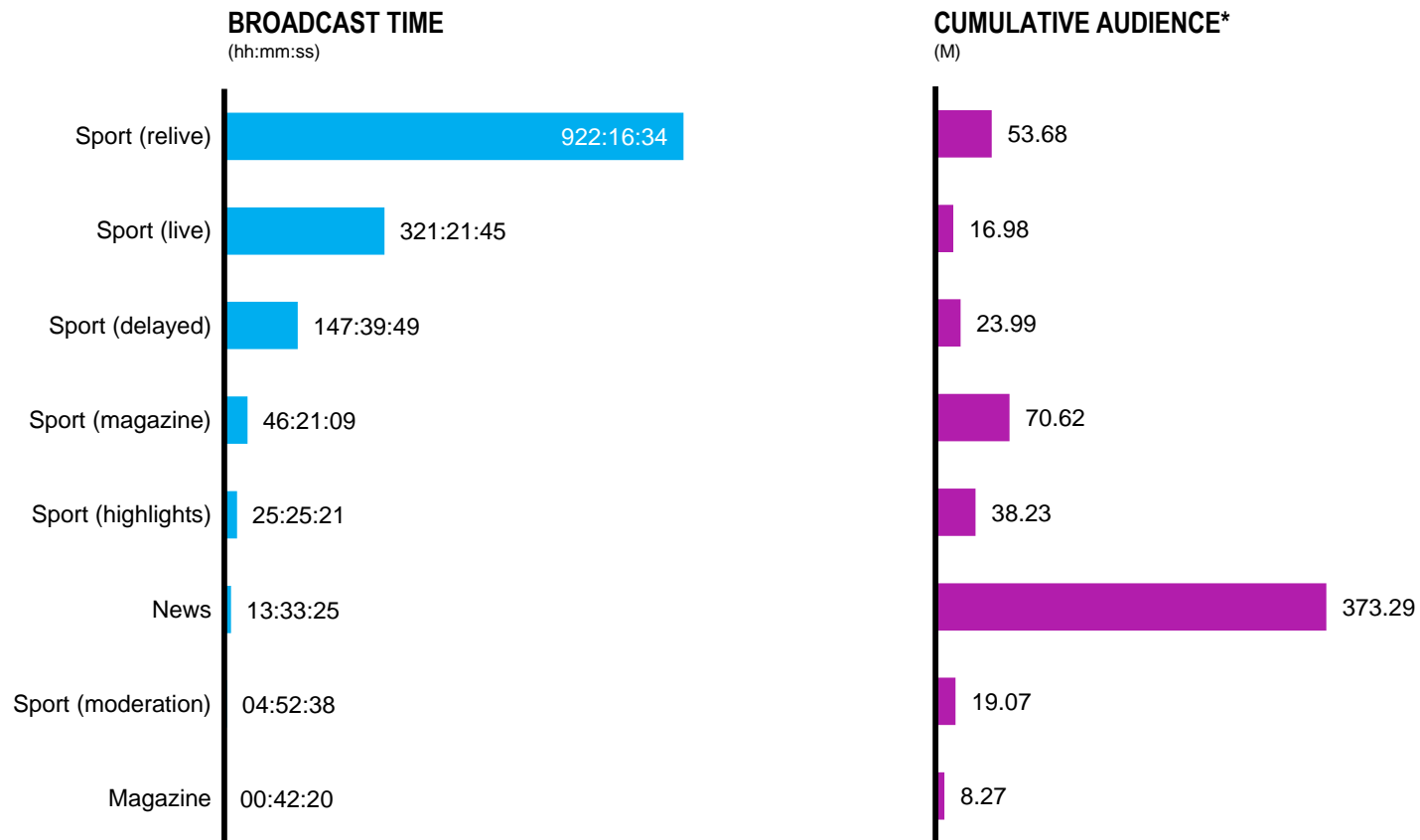


**78% OF
TOTAL**

MEDIA MONITORING

By Programme Type

**FREESTYLE SKI
WORLD CUP**

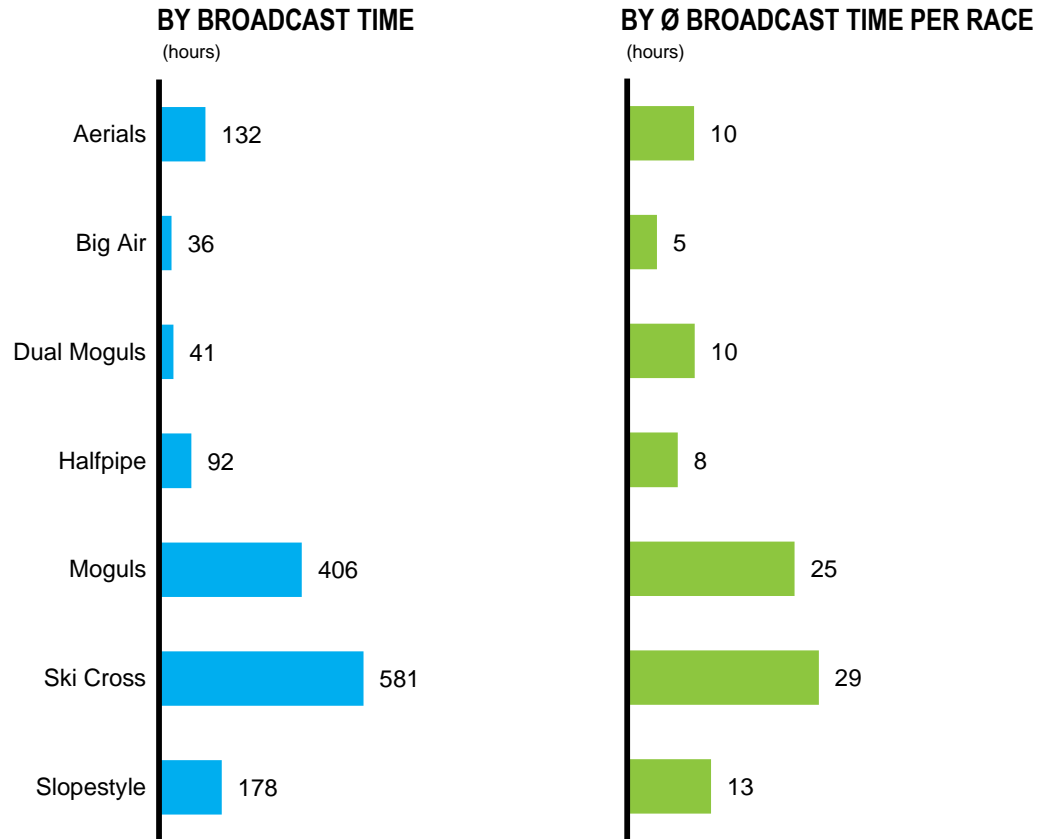


*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+/Estimations by Nielsen Sports
TV Media Evaluation - FIS Freestyle Ski World Cup 2017/18

MEDIA MONITORING

Ski Cross and Moguls are the dominating events by broadcast time and average broadcast time per race.

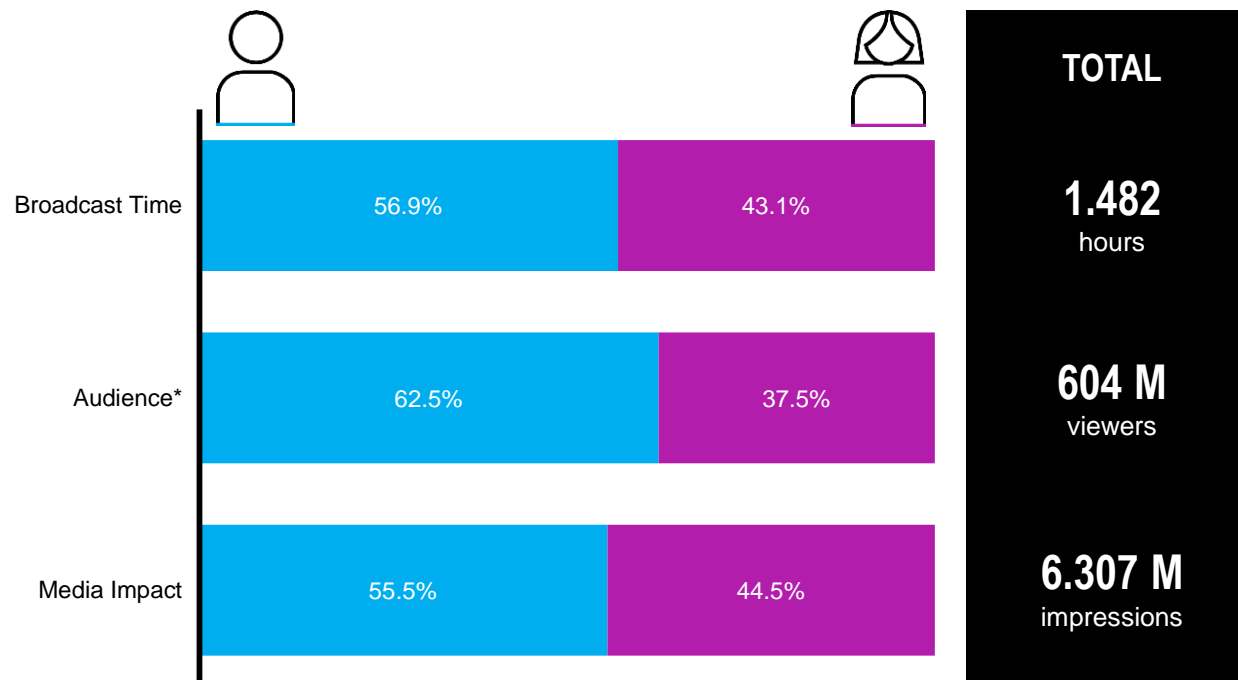
**FREESTYLE SKI
WORLD CUP**



MEDIA MONITORING

Comparison of Genders

**FREESTYLE SKI
WORLD CUP**

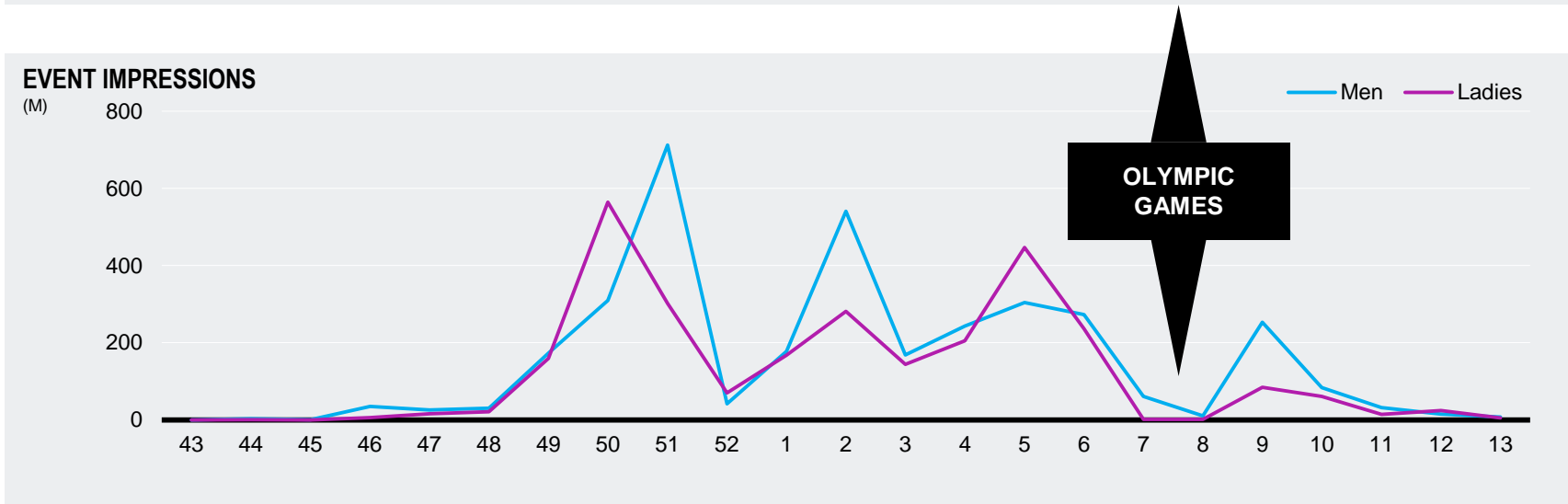
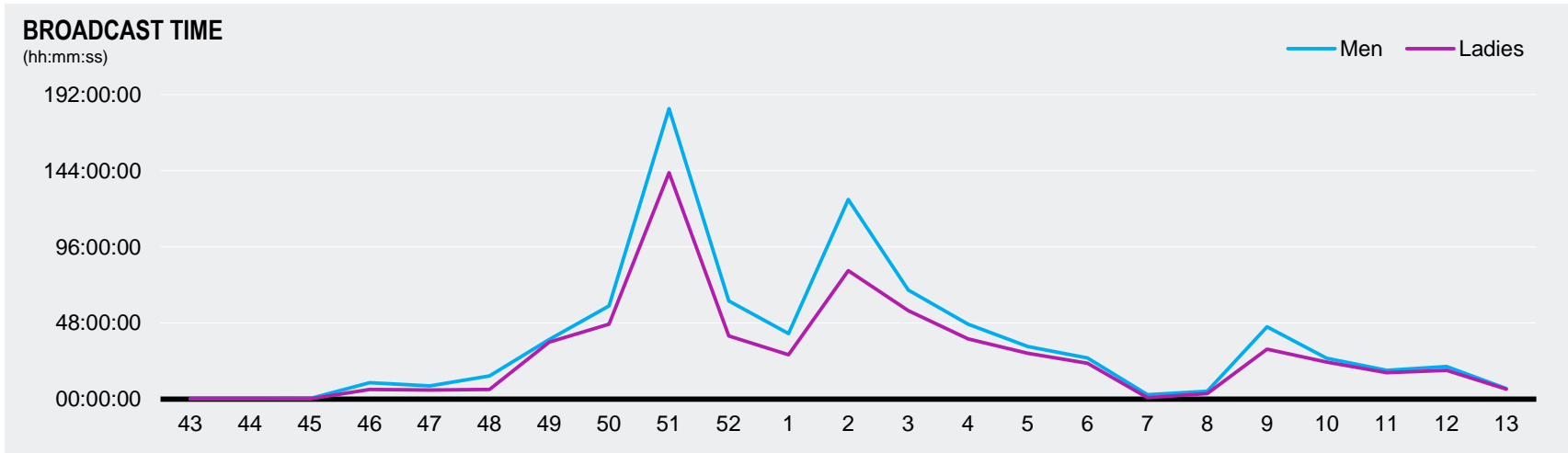


*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+/Estimations by Nielsen Sports
TV Media Evaluation - FIS Freestyle Ski World Cup 2017/18

MEDIA MONITORING

Coverage Trend by Week

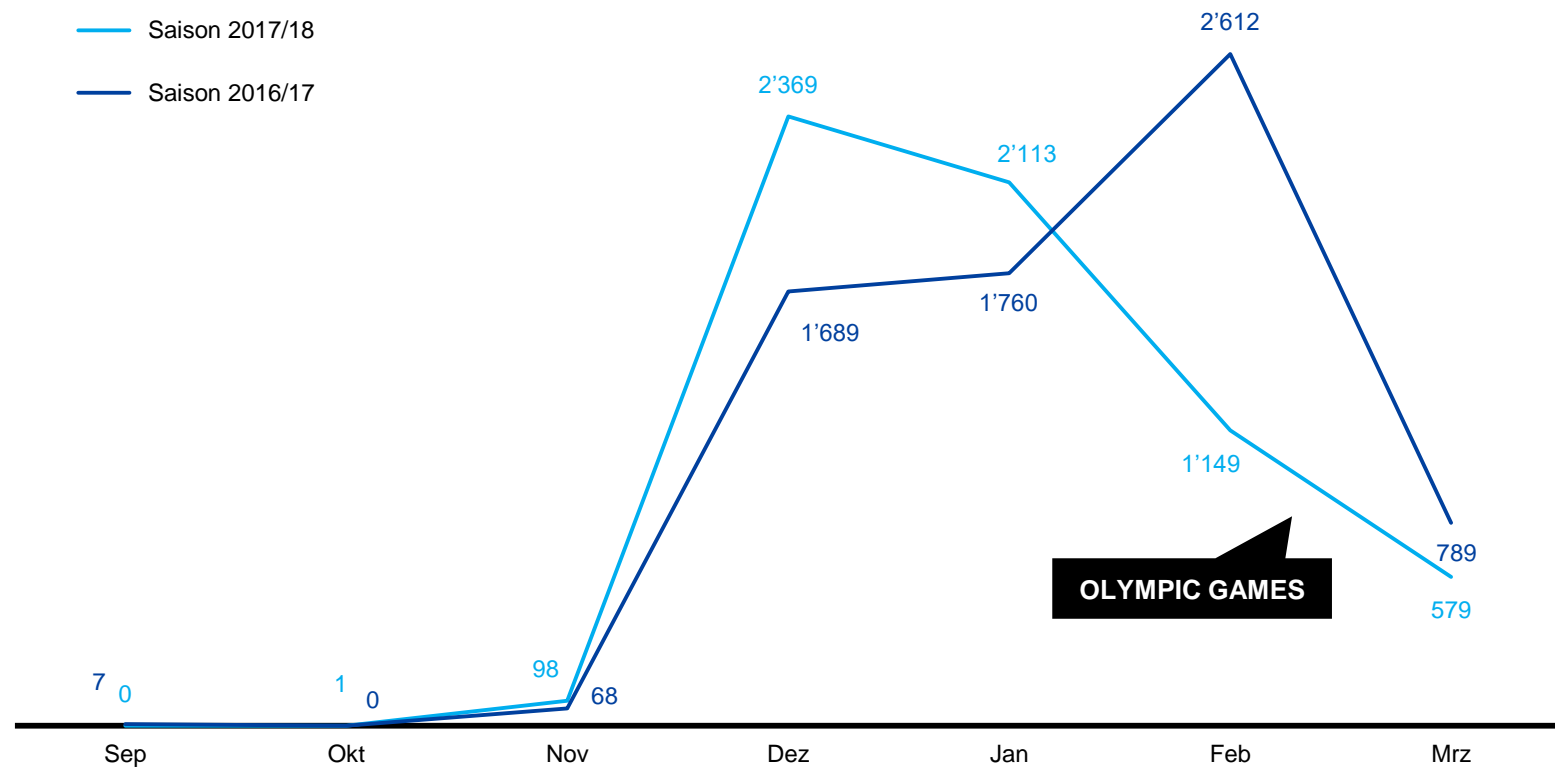
**FREESTYLE SKI
WORLD CUP**



MEDIA MONITORING

Season Comparison by Event Impressions

**FREESTYLE SKI
WORLD CUP**





RESULT PRESENTATION

- Media Monitoring
- **Media Monitoring – Focus Ski Cross**
- Media Monitoring – Focus Cross Alps Tour
- Sponsorship Analysis

MANAGEMENT SUMMARY

AUDI FIS Ski Cross World Cup



AUDI FIS SKI CROSS
WORLD CUP 2017/18

	LIVE	NON-LIVE	TOTAL
CUMULATIVE AUDIENCE* (M)	5,24	129,93	135,17
BROADCAST TIME (hh:mm:ss)	173:51:30	407:00:54	580:52:25
NUMBER OF BROADCASTS (#)	210	1.562	1.772
EVENT IMPRESSIONS (M)	589,82	733,14	1.322,96
VISIBILITY (hh:mm:ss)	79:10:33	178:17:42	257:28:15
NUMBER OF SEQUENCES (#)	47.879	108.016	155.895
SPONSORSHIP IMPRESSIONS (M)	252,50	297,75	550,25
100% MEDIA EQUIVALENCY (€)	6.052.079	3.689.871	9.741.950
QI MEDIA VALUE (€)	1.337.437	830.428	2.167.864
AVERAGE SEQUENCE DURATION (s)	5,95	5,94	5,95



MEDIA MONITORING

By Country

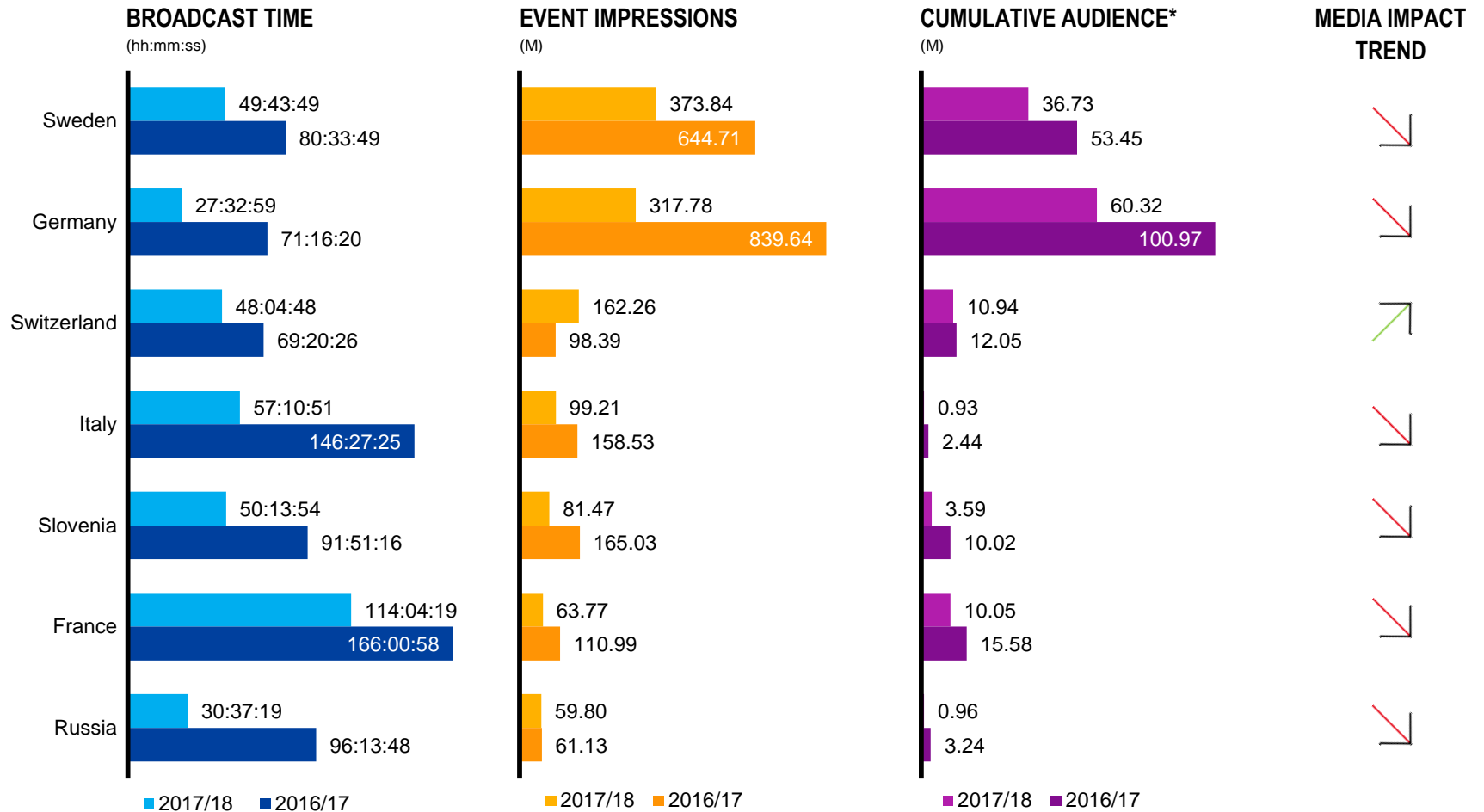


COUNTRY	NUMBER OF BROADCASTS (#)	CUMULATIVE AUDIENCE* (M)	BROADCAST TIME (hh:mm:ss)	ACTUAL PLAYING TIME (hh:mm:ss)	EVENT IMPRESSIONS (M)
Austria	140	4,05	45:52:14	39:54:36	46,25
Canada	30	1,84	01:01:20	00:55:57	2,89
China	92	3,22	21:51:00	20:44:17	54,49
Finland	69	0,05	33:14:44	31:34:47	3,31
France	291	10,05	114:04:19	101:18:56	63,77
Germany	132	60,32	27:32:59	24:32:05	317,78
Italy	88	0,93	57:10:51	53:03:51	99,21
Norway	92	1,12	31:28:15	29:28:48	31,58
Russia	64	0,96	30:37:19	28:26:50	59,80
Slovenia	120	3,59	50:13:54	45:57:56	81,47
South Korea	2	0,15	00:01:04	00:00:51	0,19
Spain	53	0,74	24:35:59	23:21:23	4,70
Sweden	181	36,73	49:43:49	44:47:55	373,84
Switzerland	333	10,94	48:04:48	43:05:35	162,26
United Kingdom	65	0,43	31:49:50	30:13:54	17,24
USA	20	0,05	13:29:59	12:49:29	4,18
TOTAL	1.772	135,17	580:52:25	530:17:12	1.322,96

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

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 Freestyle Ski World Cup 2017/18

MEDIA MONITORING

By Country Trend

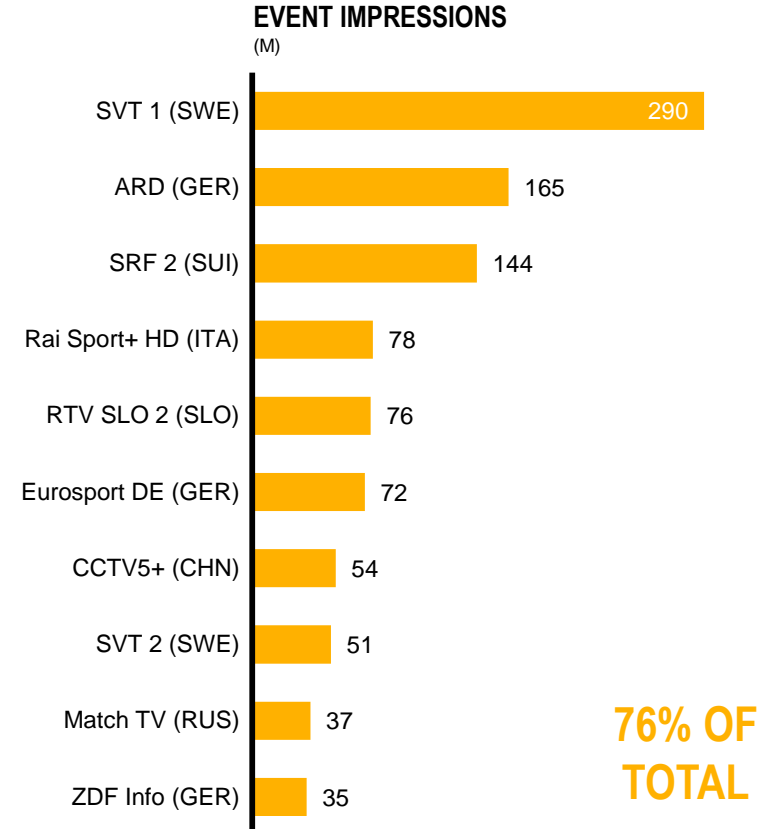
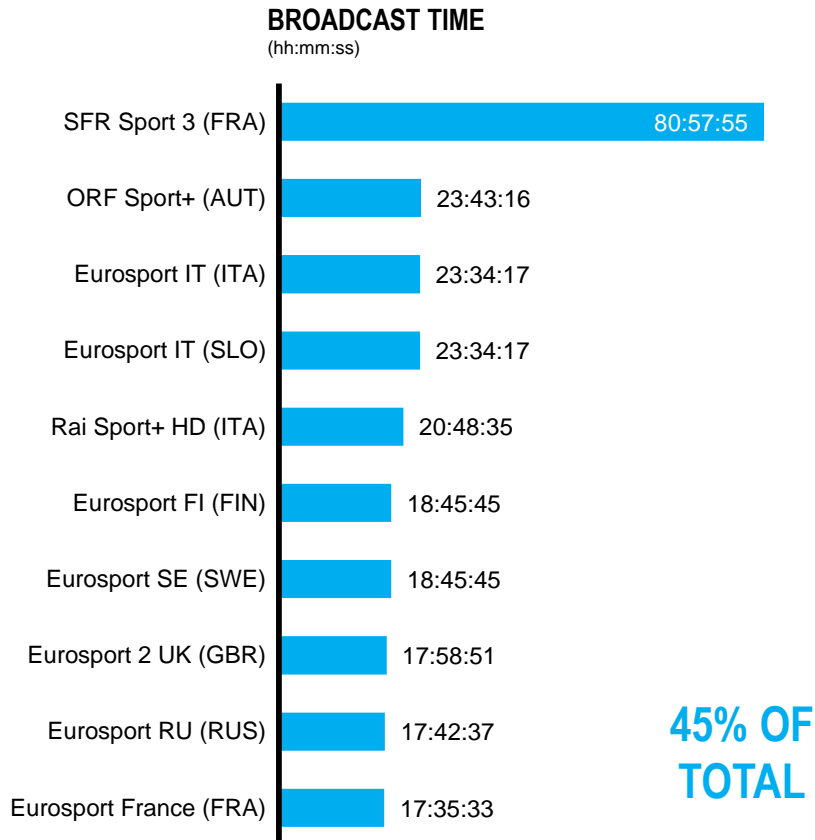


COUNTRY	2017/18			2016/17		
	CUMULATIVE AUDIENCE*	BROADCAST TIME	EVENT IMPRESSIONS	CUMULATIVE AUDIENCE*	BROADCAST TIME	EVENT IMPRESSIONS
	(M)	(hh:mm:ss)	(M)	(M)	(hh:mm:ss)	(M)
Austria	4,05	45:52:14	46,25	2,58	112:19:32	99,62
Canada	1,84	01:01:20	2,89	3,97	04:54:09	64,56
China	3,22	21:51:00	54,49	24,05	17:55:34	425,17
Finland	0,05	33:14:44	3,31	0,09	66:06:57	8,88
France	10,05	114:04:19	63,77	15,58	166:00:58	110,99
Germany	60,32	27:32:59	317,78	100,97	71:16:20	839,64
Italy	0,93	57:10:51	99,21	2,44	146:27:25	158,53
Norway	1,12	31:28:15	31,58	3,09	63:48:47	88,16
Russia	0,96	30:37:19	59,80	3,24	96:13:48	61,13
Slovenia	3,59	50:13:54	81,47	10,02	91:51:16	165,03
South Korea	0,15	00:01:04	0,19	-	-	-
Spain	0,74	24:35:59	4,70	0,16	85:14:37	8,84
Sweden	36,73	49:43:49	373,84	53,45	80:33:49	644,71
Switzerland	10,94	48:04:48	162,26	12,05	69:20:26	98,39
United Kingdom	0,43	31:49:50	17,24	0,30	60:09:57	25,51
USA	0,05	13:29:59	4,18	-	-	-
TOTAL	135,17	580:52:25	1.322,96	232,30	1132:14:29	2.799,71

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

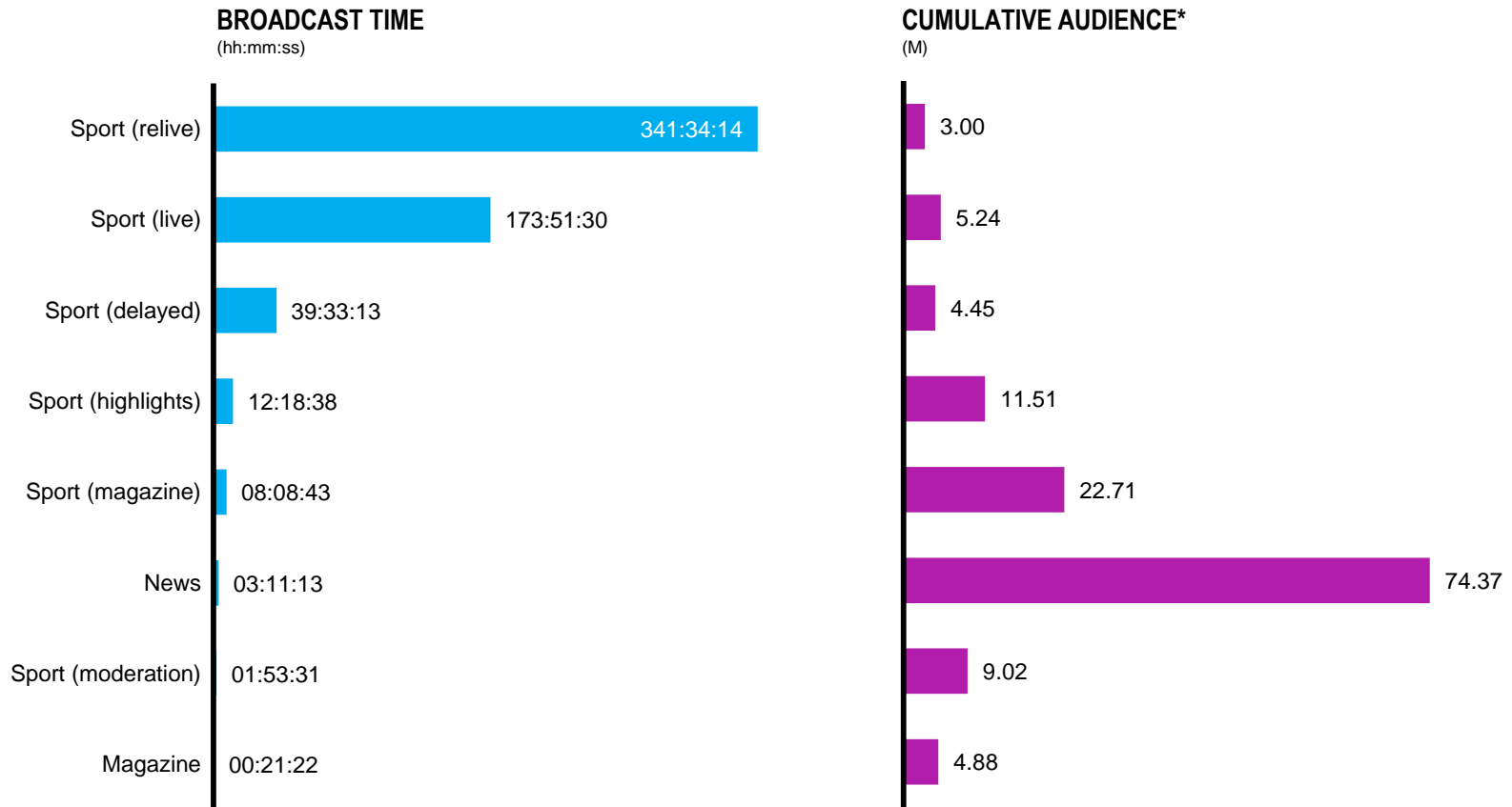
MEDIA MONITORING

By Channel (Top 10)



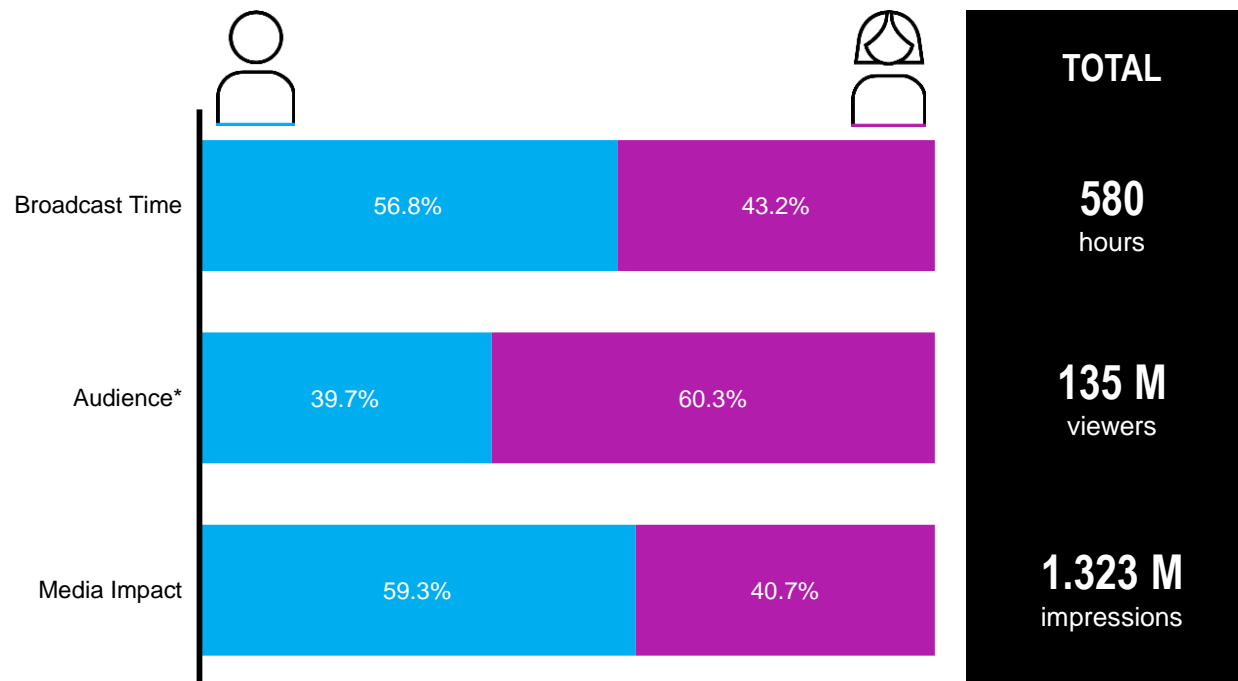
MEDIA MONITORING

By Programme Type



MEDIA MONITORING

Comparison of Genders



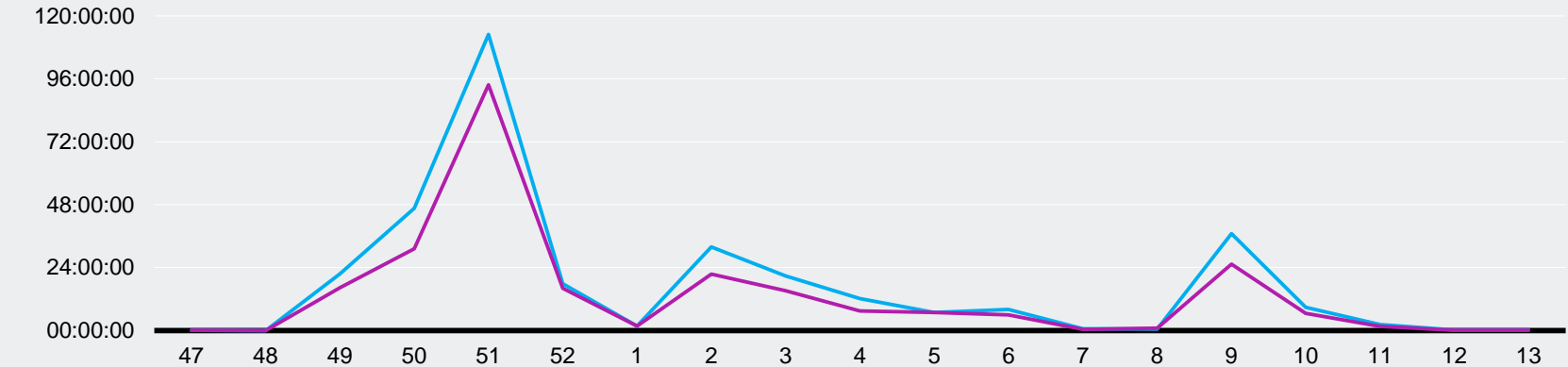
MEDIA MONITORING

Coverage Trend by Week



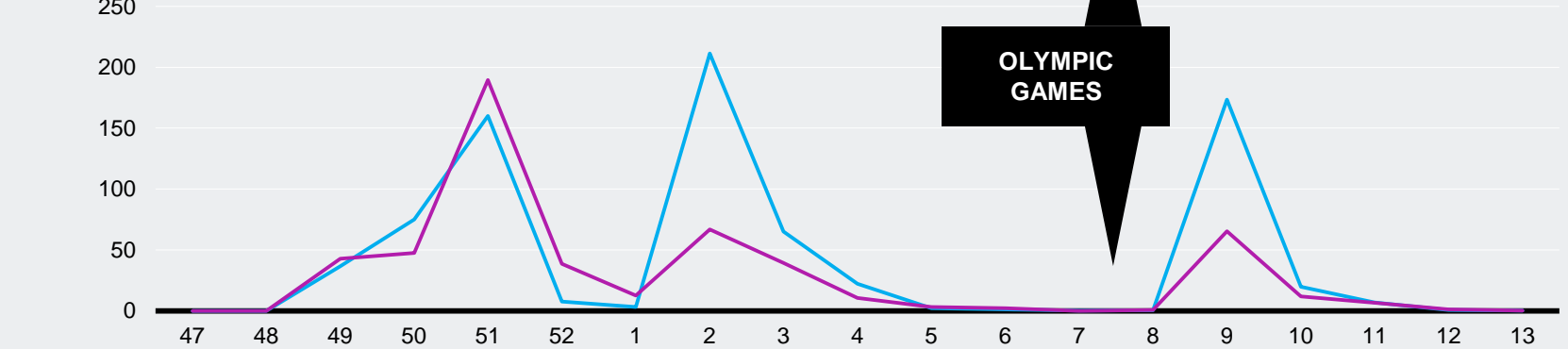
BROADCAST TIME

(hh:mm:ss)



EVENT IMPRESSIONS

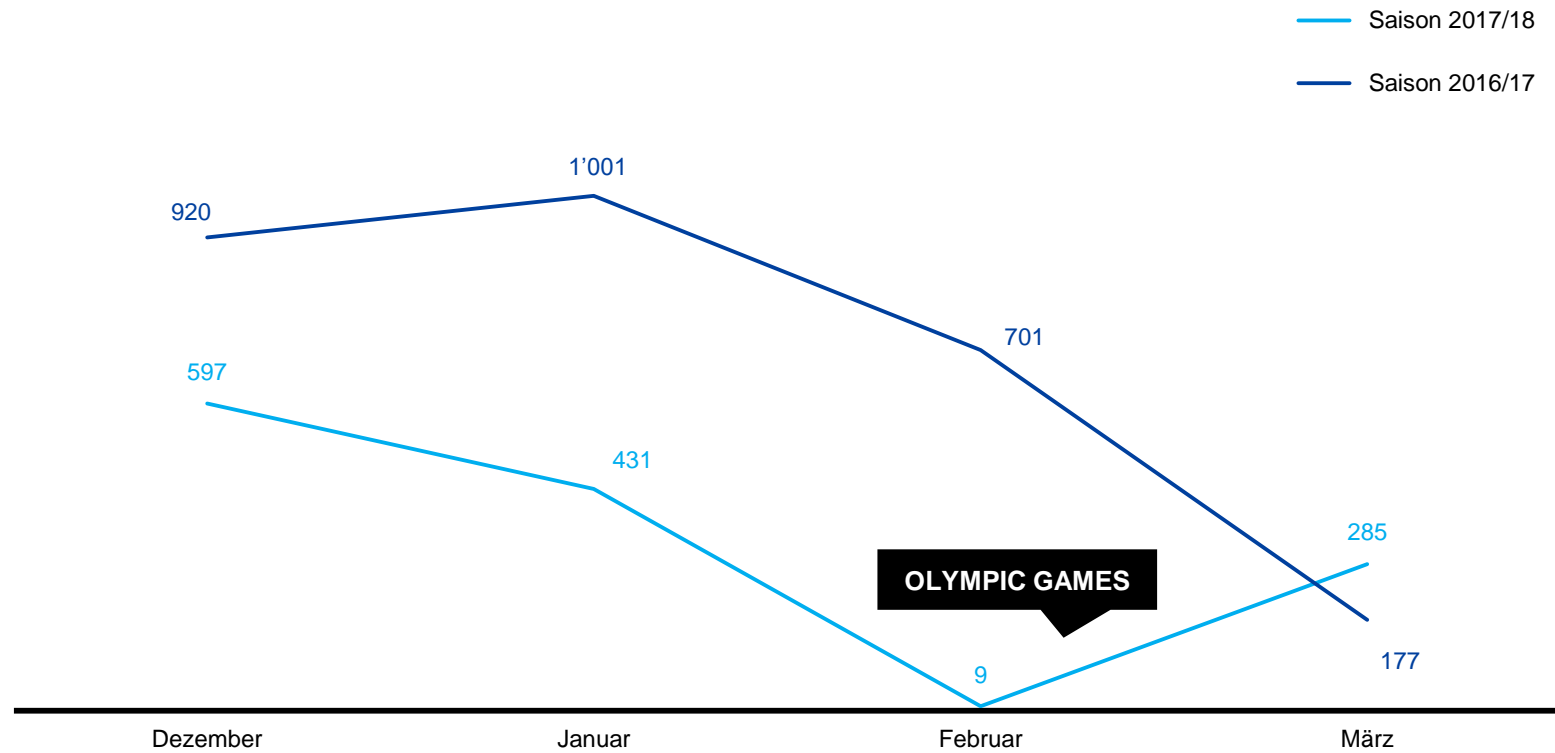
(M)



OLYMPIC GAMES

MEDIA MONITORING

Season Comparison by Event Impression



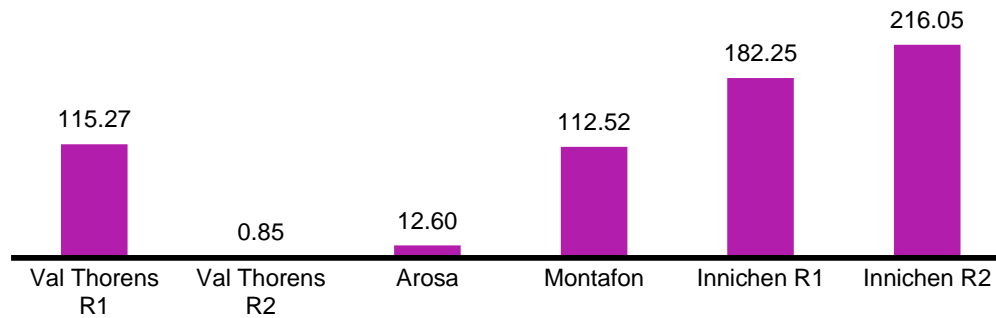
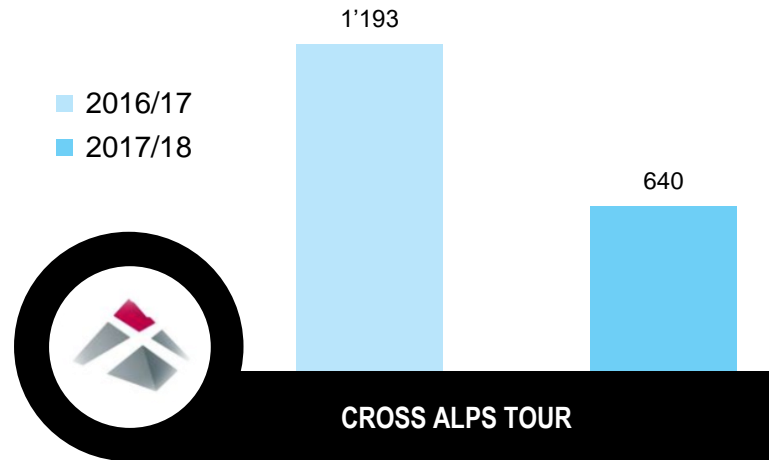
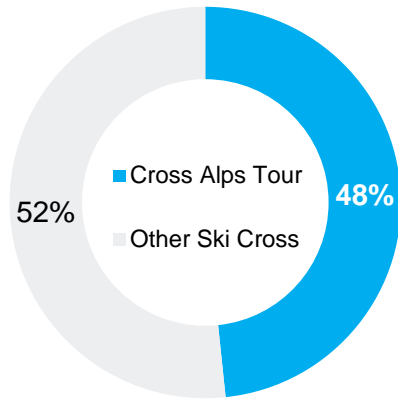


RESULT PRESENTATION

- Media Monitoring
- Media Monitoring – Focus Ski Cross
- **Media Monitoring – Focus Cross Alps Tour**
- Sponsorship Analysis

MEDIA MONITORING

Cross Alps Tour represents 48% of the overall Ski Cross media impact, the second round in Innichen contributes the highest share to the result.



Audi FIS Ski Cross World Cup Cross Alps Tour

4 RESORTS
6 RACES
14 DAYS

MEDIA MONITORING

By Country Trend



Audi FIS Ski Cross
World Cup
Cross Alps Tour



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	3,81	30:32:22	35,51	2,23	73:06:42	46,43
Canada	0,22	00:08:53	0,26	1,34	00:40:49	3,45
China	1,90	15:31:33	34,63	17,21	09:55:25	318,77
Finland	0,05	24:46:45	3,24	0,02	48:41:58	2,54
France	3,91	67:00:08	44,55	12,23	109:02:33	65,13
Germany	41,09	19:01:02	215,62	40,97	48:34:27	302,50
Italy	0,54	41:52:49	54,88	1,61	91:13:39	66,66
Norway	0,60	22:49:42	15,35	2,00	48:23:01	34,42
Russia	0,48	20:55:20	13,65	2,59	56:42:45	15,36
Slovenia	1,72	38:07:29	27,51	4,90	66:12:41	63,63
South Korea	0,15	00:01:04	0,19	-	-	-
Spain	0,73	18:00:29	3,90	0,07	62:54:15	6,60
Sweden	19,82	31:08:13	115,26	24,19	54:48:04	197,01
Switzerland	4,10	25:35:11	61,60	4,87	45:53:19	54,51
United Kingdom	0,32	18:27:46	10,09	0,19	42:14:58	15,79
USA	0,04	10:29:59	3,28	-	-	-
TOTAL	79,47	384:28:47	639,53	114,43	758:24:35	1.192,80

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

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