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FIS NORDIC COMBINED WORLD CUP 2017/18

TV Media Evaluation – Event Summary



Expertise by Nielsen Sports

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INTRODUCTION

STUDY BRIEF

| | |
|---------------------------|--|
| SPONSORS | Audi, Viessmann |
| ANALYSIS PERIOD | 2017/18 Season |
| EVENT | FIS Nordic Combined World Cup 2017/18 (M) |
| MARKETS | Austria, Finland, France, Germany, Italy, Japan, Norway, Russia, Switzerland, 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 Nordic Combined World Cup

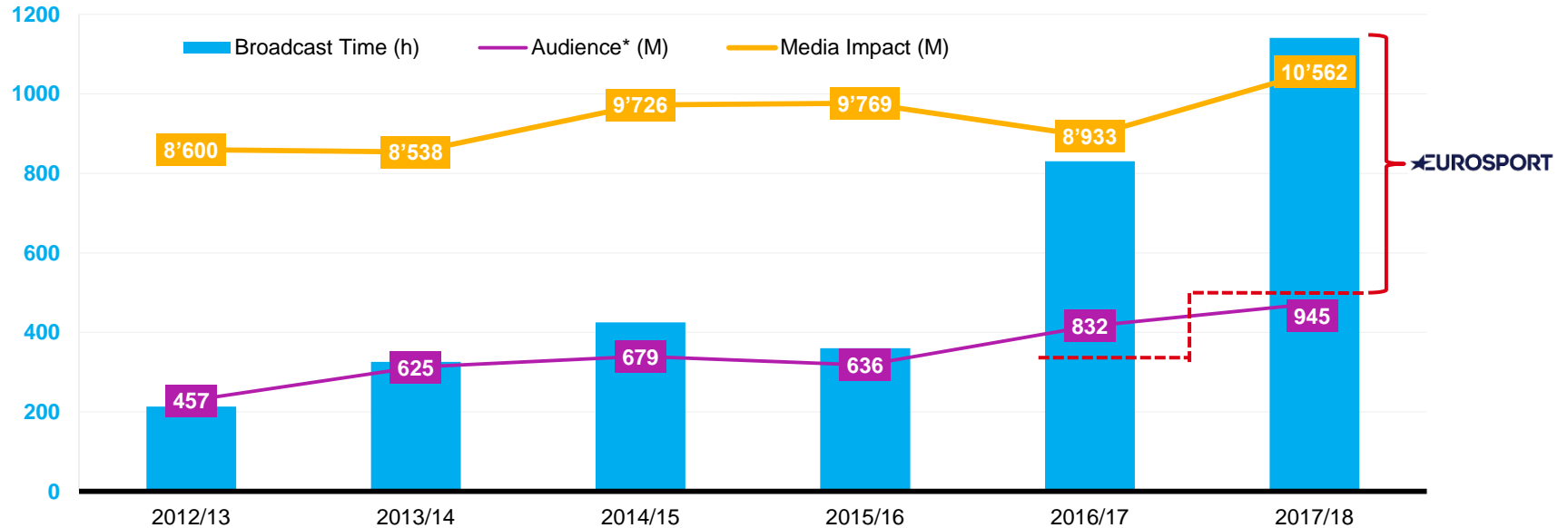


| | LIVE | NON-LIVE | TOTAL | |
|--|-------------------------------|------------|------------|------------|
| FIS NORDIC COMBINED WORLD CUP 2017/18 | CUMULATIVE AUDIENCE* (M) | 92,55 | 852,62 | 945,17 |
| | BROADCAST TIME (hh:mm:ss) | 350:42:00 | 790:18:42 | 1141:00:42 |
| | NUMBER OF BROADCASTS (#) | 398 | 3.056 | 3.454 |
| | EVENT IMPRESSIONS (M) | 6.141,70 | 4.420,71 | 10.562,41 |
| ALL FIS PARTNERS | VISIBILITY (hh:mm:ss) | 254:22:02 | 638:38:15 | 893:00:18 |
| | NUMBER OF SEQUENCES (#) | 162.825 | 381.575 | 544.400 |
| | SPONSORSHIP IMPRESSIONS (M) | 4.915,91 | 2.542,12 | 7.458,03 |
| | 100% MEDIA EQUIVALENCY (€) | 59.336.189 | 26.950.688 | 86.286.877 |
| | QI MEDIA VALUE (€) | 11.092.114 | 5.179.473 | 16.271.587 |
| | AVERAGE SEQUENCE DURATION (s) | 5,62 | 6,03 | 5,91 |

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

MANAGEMENT SUMMARY

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



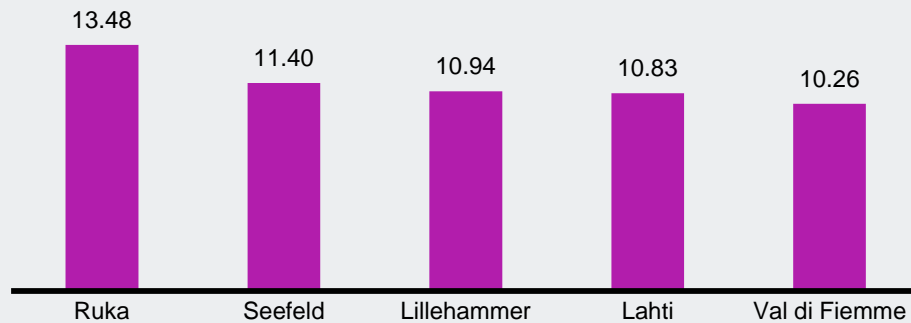
- All relevant TV media monitoring KPIs increased year-on-year and reached all-time highs in the 2017/18 season.
- Thanks to a broader coverage across the Eurosport network, broadcast time went up by 37% compared to previous season.
- Cumulative audience increased by 14%. Thanks to Akito Watabe breaking the dominance of German athletes, cum. audience in Japan sextupled year-on-year (+253M). This incredible development could even overcompensate for a loss of 150 million viewers in Germany.
- This sharp increase in audience resulted in a more than 7-times higher media impact in Japan compared to 2016/17. In addition, audience of dedicated coverage on ARD & ZDF in Germany increased by 44%, also having a positive impact on the overall development of media impact.
- Further markets with a positive trend in media impact are France (+24%), Finland (+21%), and Norway (+20%).

MANAGEMENT SUMMARY

Media Monitoring

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

(M)



- Ruka is the venue with the highest audience of live airings. One reason is that it is one of only three venues with three events (besides Seefeld and Val di Fiemme).
- Cross-Country and Ski Jumping events taking place simultaneously in Ruka possibly had a positive impact on the overall media coverage, too.
- With 7,01M viewers on ARD, the German public broadcaster accounts for more than half of Ruka's cumulative live audience. Finish YLE 2 (2,64M) and Norwegian NRK 1 (2,27M) are further major contributors.
- Although the dominance of German athletes was not continued during the 2017/18 season, Germany clearly ranks top again in terms of media impact, even increasing by another 8%.
- Norway comes second again (+20%) thanks to wider-reaching dedicated coverage on NRK 1 & 2, followed by Japan (+647%).

MARKET RANKING – EVENT IMPRESSIONS

(M)

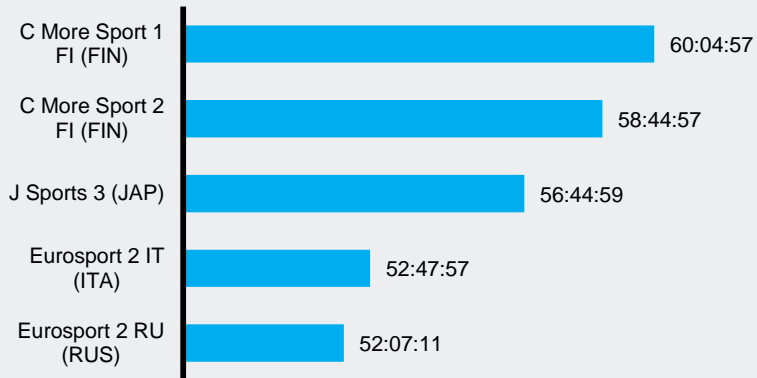


MANAGEMENT SUMMARY

Media Monitoring

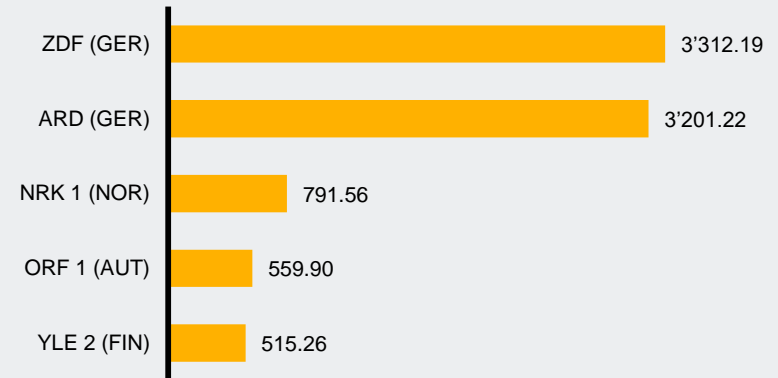
CHANNEL RANKING BY BROADCAST TIME (TOP 5)

(hh:mm:ss)



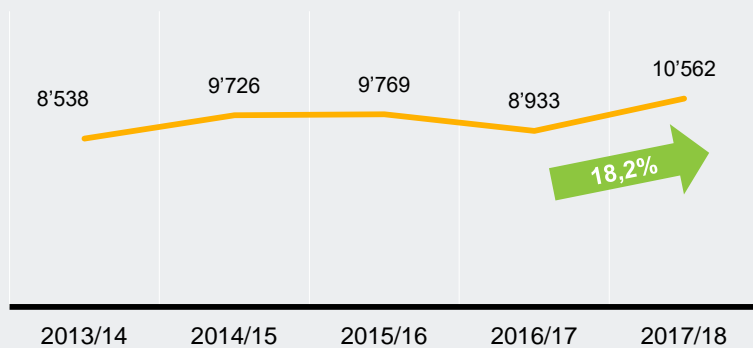
CHANNEL RANKING BY EVENT IMPRESSIONS (TOP 5)

(M)



WORLD CUP EVENT IMPRESSIONS TREND

(M)



- Similar to the previous season, Finnish pay-tv-channels C More Sport 1 & 2 account for the highest broadcast time.
- From a broadcaster perspective, Eurosport aired the broadest coverage (636h across the 8 European countries monitored), followed by Japanese J Sports (154h).
- German public broadcasters ARD & ZDF account for the highest media impact again, just switching their places compared to 2016/17. Despite a decline in wide-reaching news features, a higher audience of dedicated coverage pushed this positive development.
- A migration of viewership from Eurosport to ARD & ZDF could be observed in Germany. While media impact on Eurosport 1 & 2 declined by 16%, the public broadcasters gained 45% (dedicated coverage only).



RESULT PRESENTATION

- **Media Monitoring**
- Media Monitoring – Focus Seefeld Triple
- Sponsorship Analysis

MEDIA MONITORING

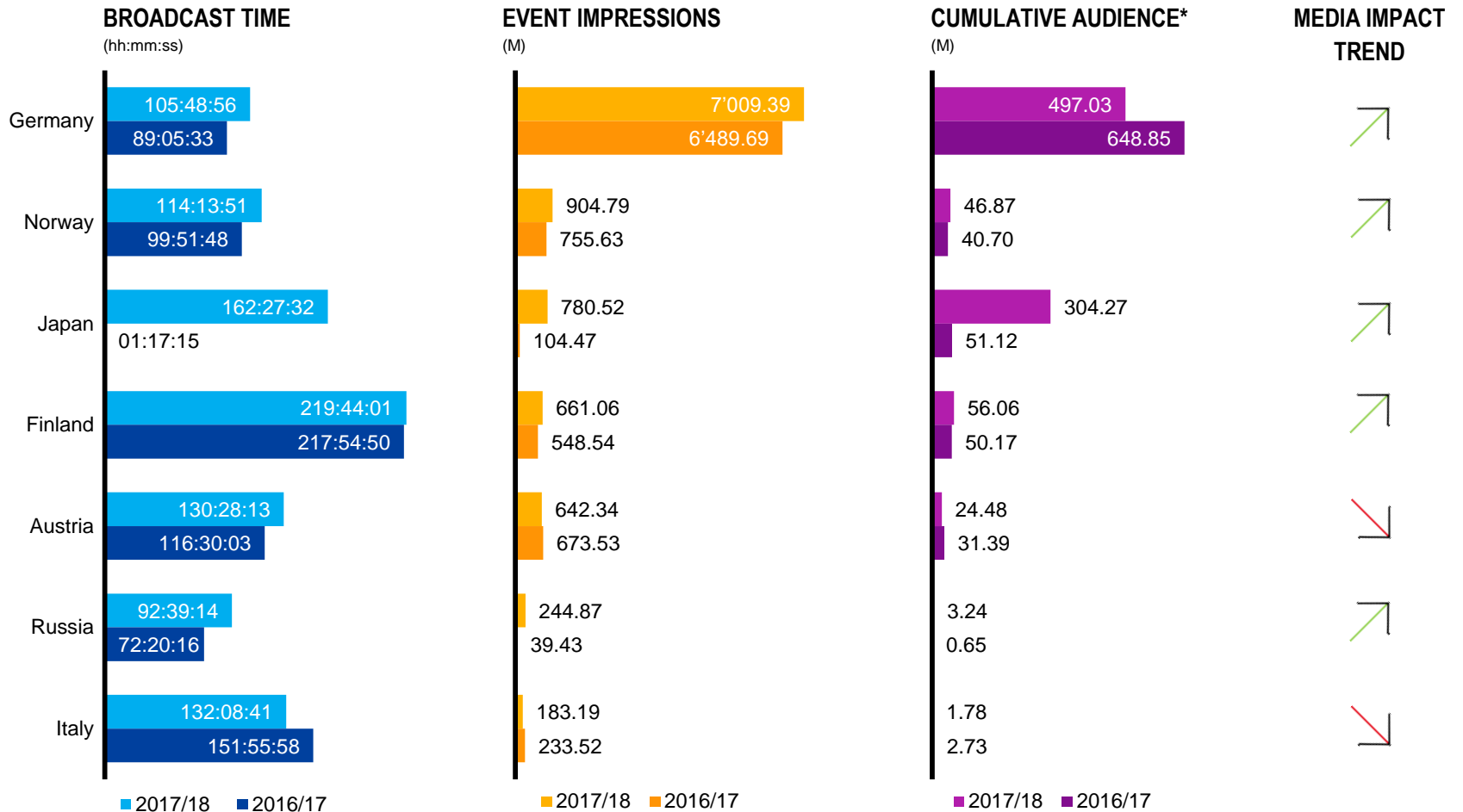
By Country



| COUNTRY | NUMBER OF BROADCASTS (#) | CUMULATIVE AUDIENCE* (M) | BROADCAST TIME (hh:mm:ss) | ACTUAL PLAYING TIME (hh:mm:ss) | EVENT IMPRESSIONS (M) |
|--------------|-----------------------------|-----------------------------|------------------------------|-----------------------------------|--------------------------|
| Austria | 443 | 24,48 | 130:28:13 | 108:55:58 | 642,34 |
| Finland | 425 | 56,06 | 219:44:01 | 204:34:55 | 661,06 |
| France | 315 | 9,97 | 104:49:04 | 92:21:02 | 108,52 |
| Germany | 682 | 497,03 | 105:48:56 | 88:54:22 | 7.009,39 |
| Italy | 179 | 1,78 | 132:08:41 | 125:11:46 | 183,19 |
| Japan | 350 | 304,27 | 162:27:32 | 60:34:55 | 780,52 |
| Norway | 645 | 46,87 | 114:13:51 | 103:49:21 | 904,79 |
| Russia | 151 | 3,24 | 92:39:14 | 87:53:31 | 244,87 |
| Switzerland | 260 | 1,45 | 74:41:11 | 65:49:03 | 26,83 |
| USA | 4 | 0,01 | 04:00:00 | 03:48:00 | 0,90 |
| TOTAL | 3.454 | 945,17 | 1141:00:43 | 941:52:54 | 10.562,41 |

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 Nordic Combined World Cup 2017/18

MEDIA MONITORING

By Country Trend



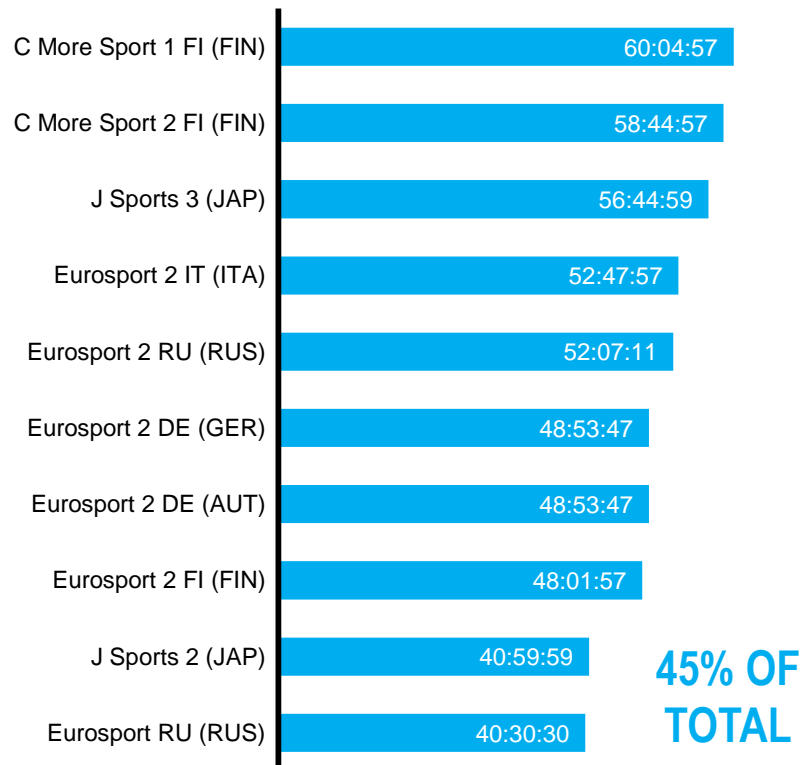
| COUNTRY | 2017/18 | | | 2016/17 | | |
|--------------|----------------------|-------------------|-------------------|----------------------|------------------|-------------------|
| | CUMULATIVE AUDIENCE* | BROADCAST TIME | EVENT IMPRESSIONS | CUMULATIVE AUDIENCE* | BROADCAST TIME | EVENT IMPRESSIONS |
| | (M) | (hh:mm:ss) | (M) | (M) | (hh:mm:ss) | (M) |
| Austria | 24,48 | 130:28:13 | 642,34 | 31,39 | 116:30:03 | 673,53 |
| Finland | 56,06 | 219:44:01 | 661,06 | 50,17 | 217:54:50 | 548,54 |
| France | 9,97 | 104:49:04 | 108,52 | 5,82 | 82:03:29 | 87,82 |
| Germany | 497,03 | 105:48:56 | 7.009,39 | 648,85 | 89:05:33 | 6.489,69 |
| Italy | 1,78 | 132:08:41 | 183,19 | 2,73 | 151:55:58 | 233,52 |
| Japan | 304,27 | 162:27:32 | 780,52 | 51,12 | 01:17:15 | 104,47 |
| Norway | 46,87 | 114:13:51 | 904,79 | 40,70 | 99:51:48 | 755,63 |
| Russia | 3,24 | 92:39:14 | 244,87 | 0,65 | 72:20:16 | 39,43 |
| Switzerland | 1,45 | 74:41:11 | 26,83 | 0,18 | 00:10:07 | 0,46 |
| USA | 0,01 | 04:00:00 | 0,90 | - | - | - |
| TOTAL | 945,17 | 1141:00:43 | 10.562,41 | 831,61 | 831:09:18 | 8.933,10 |

MEDIA MONITORING

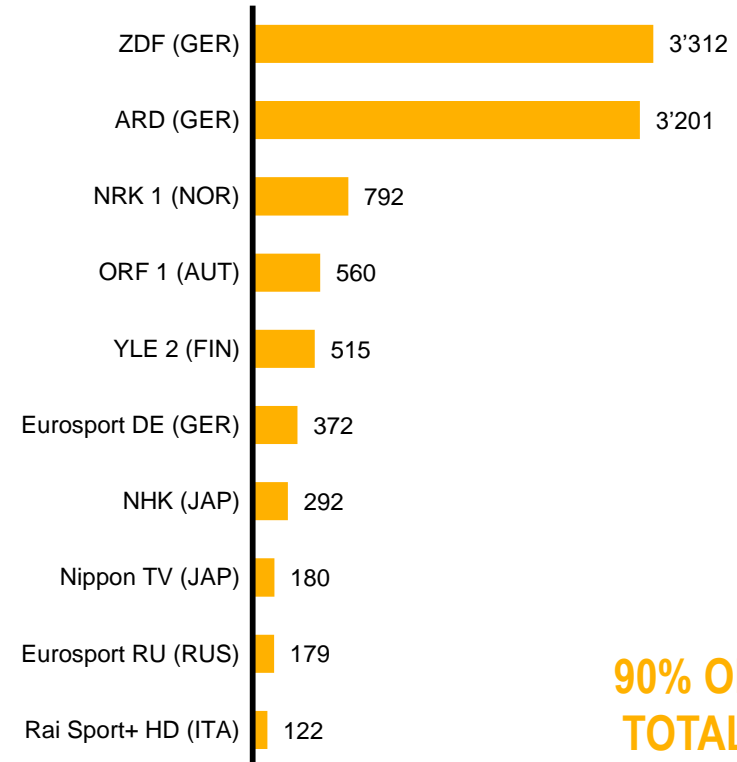
By Channel (Top 10)



BROADCAST TIME (hh:mm:ss)

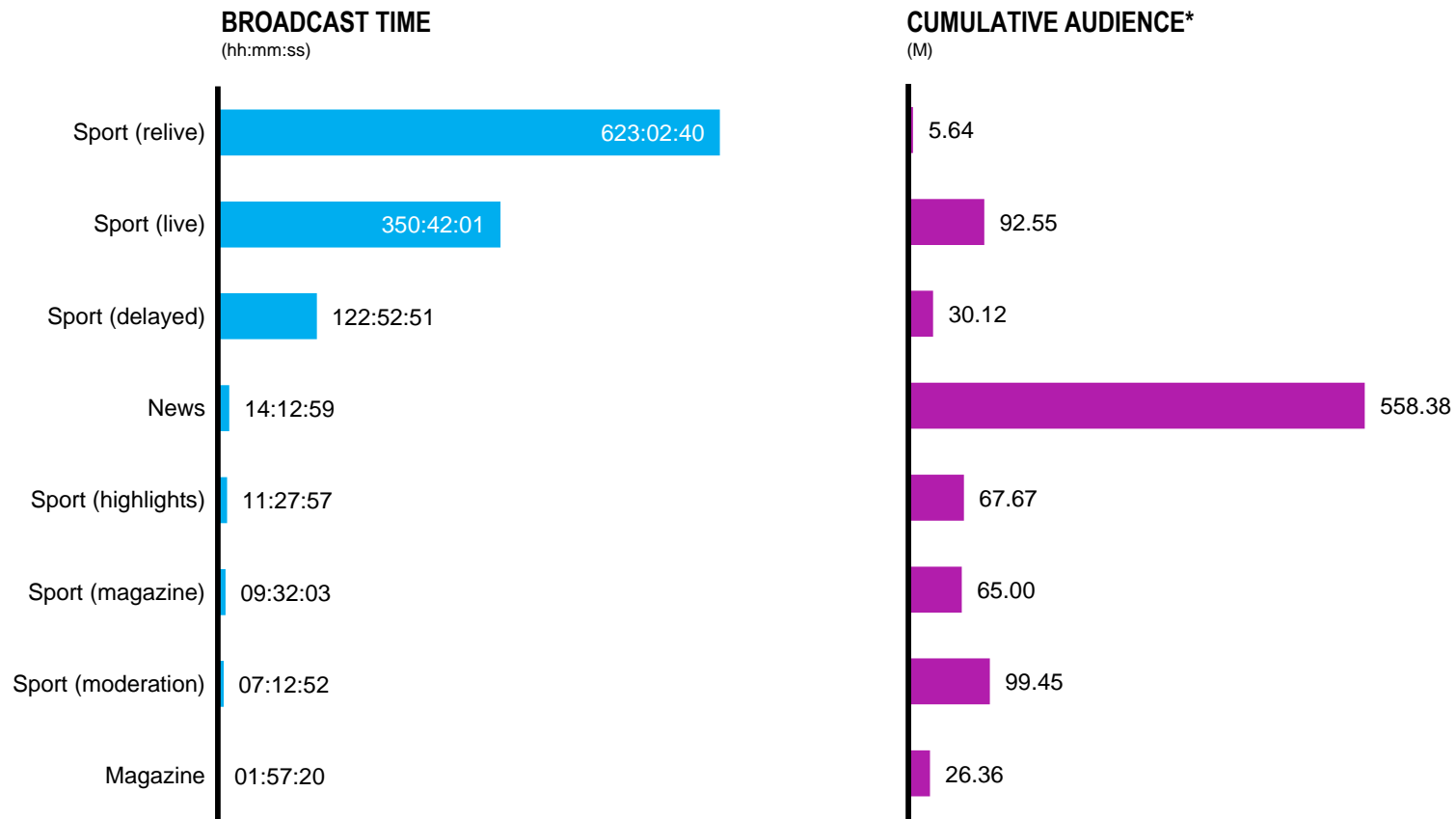


EVENT IMPRESSIONS (M)



MEDIA MONITORING

By Programme Type



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

Coverage Trend by Week



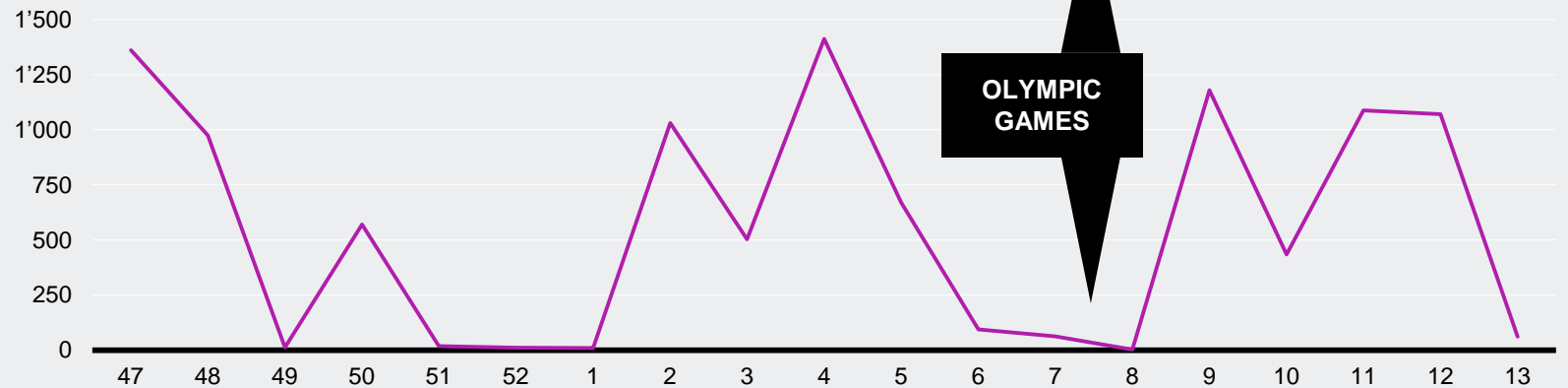
BROADCAST TIME

(hh:mm:ss)



EVENT IMPRESSIONS

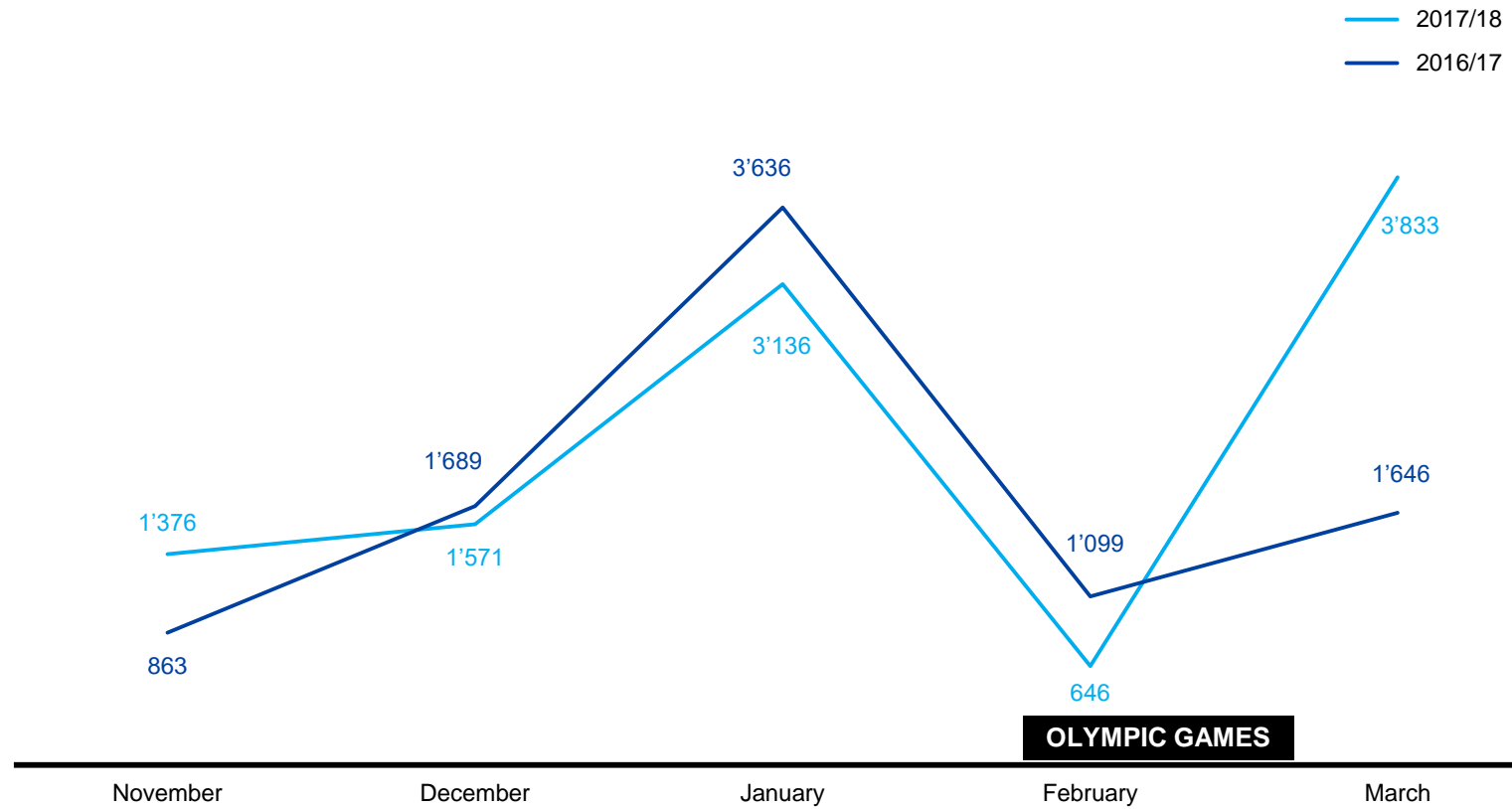
(M)



**OLYMPIC
GAMES**

MEDIA MONITORING

Season Comparison by Event Impression



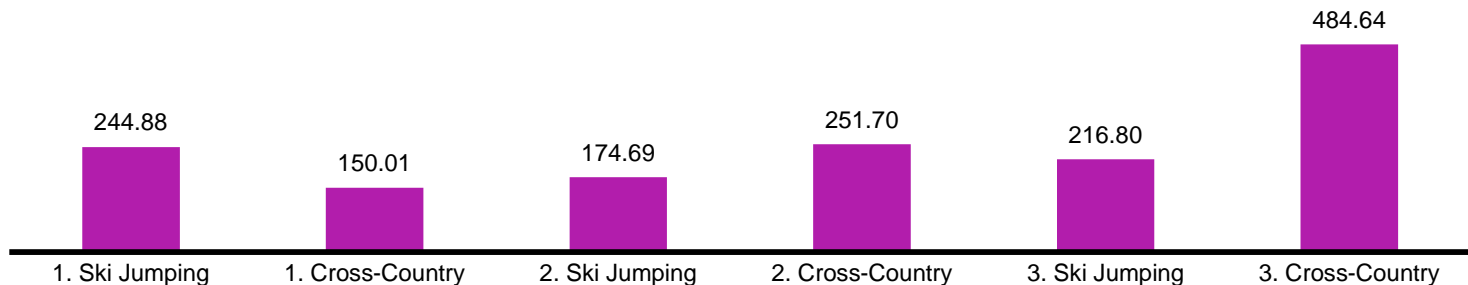
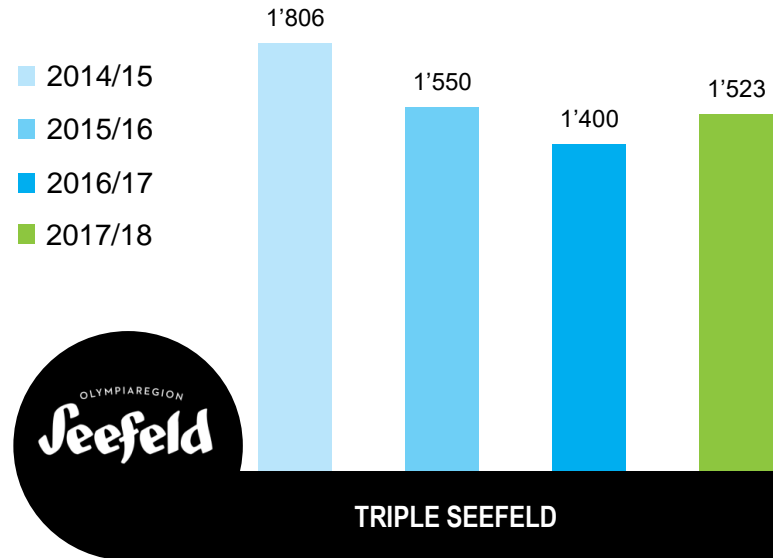
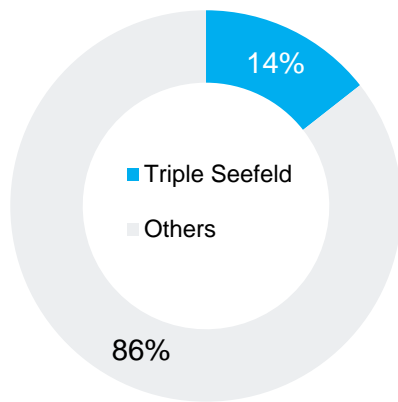


RESULT PRESENTATION

- Media Monitoring
- **Media Monitoring – Focus Seefeld Triple**
- Sponsorship Analysis

NORDIC COMBINED – FOCUS SEEFELD TRIPLE BY EVENT IMPRESSIONS

The World Cup in Seefeld represents 14% of the overall media impact, more than any other venue



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 | 5,14 | 36:14:14 | 122,34 | 8,16 | 28:45:27 | 188,46 |
| Finland | 6,98 | 31:45:47 | 19,59 | 5,18 | 19:16:52 | 31,67 |
| France | 0,21 | 34:13:35 | 19,33 | 0,12 | 23:19:40 | 12,54 |
| Germany | 45,11 | 18:24:16 | 973,18 | 93,58 | 05:26:39 | 1.074,71 |
| Italy | 0,27 | 23:06:16 | 32,95 | 0,44 | 09:31:30 | 43,52 |
| Japan | 121,47 | 21:12:34 | 186,06 | 0,40 | 00:04:57 | 0,90 |
| Norway | 6,64 | 16:43:10 | 137,62 | 2,89 | 08:58:45 | 45,87 |
| Russia | 0,36 | 19:18:03 | 27,61 | 0,03 | 05:00:00 | 2,63 |
| Switzerland | 0,05 | 12:48:36 | 4,05 | - | - | - |
| TOTAL | 186,23 | 213:50:24 | 1.522,73 | 110,78 | 100:23:48 | 1.400,30 |

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