

nielsen
.....

FIS SKI JUMPING WORLD CUP LADIES PRESENTED BY VIESSMANN 2017/18

TV Media Evaluation – Event Summary



Expertise by Nielsen Sports

Your contacts: Stephan Schröder, Akanimoh Umoh, Benedikt Neumayer, Markus Kreile

INTRODUCTION

STUDY BRIEF

SPONSORS	Audi, Viessmann
ANALYSIS PERIOD	2017/18 Season
EVENT	FIS Ski Jumping World Cup Ladies 2017/18 presented by Viessmann
MARKETS	Austria, China, Croatia, Czech Republic, Denmark, Finland, France, Germany, Italy, Japan, Netherlands, Norway, Poland, Romania, Russia, Slovakia, Slovenia, South Korea, Sweden, 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

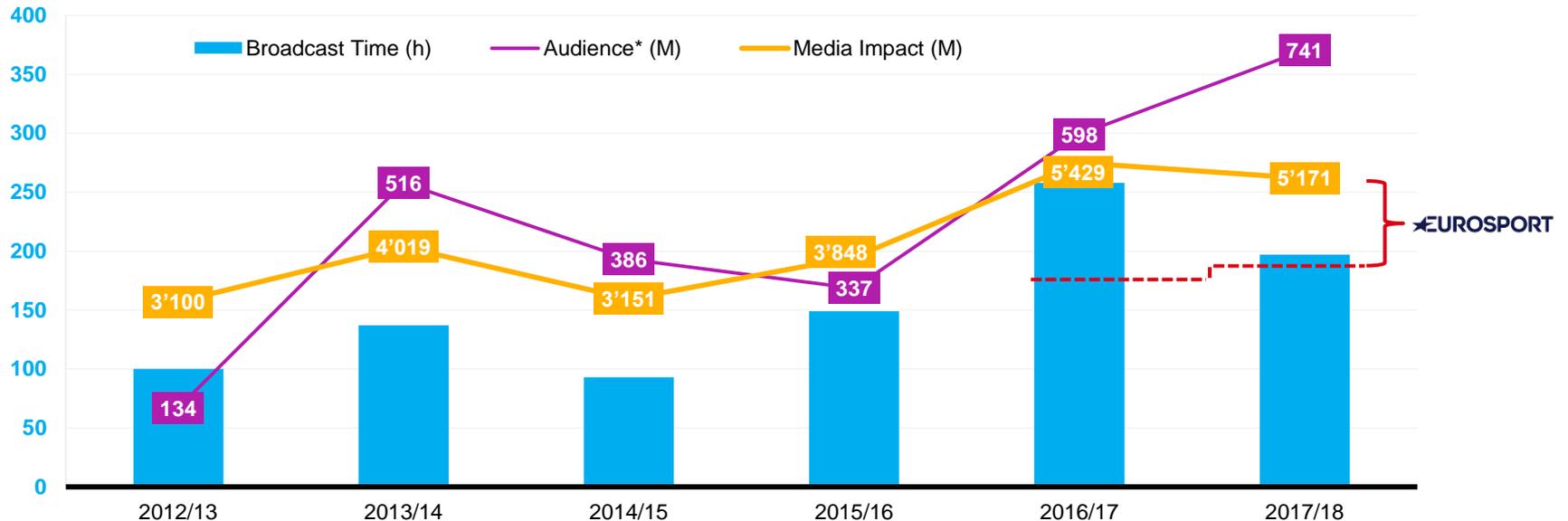
FIS Ski Jumping World Cup Ladies 2017/18



		LIVE	NON-LIVE	TOTAL
FIS SKI JUMPING WORLD CUP LADIES 2017/18	CUMULATIVE AUDIENCE* (M)	21,70	719,47	741,18
	BROADCAST TIME (hh:mm:ss)	71:25:22	125:42:05	197:07:27
	NUMBER OF BROADCASTS (#)	100	1.165	1.265
	EVENT IMPRESSIONS (M)	1.426,07	3.745,16	5.171,23
ALL FIS PARTNERS	VISIBILITY (hh:mm:ss)	41:55:35	67:10:04	109:05:39
	NUMBER OF SEQUENCES (#)	29.024	52.377	81.402
	SPONSORSHIP IMPRESSIONS (M)	870,03	1.613,59	2.483,63
	100% MEDIA EQUIVALENCY (€)	10.832.694	12.586.511	23.419.205
	QI MEDIA VALUE (€)	2.356.892	2.893.956	5.250.847
	AVERAGE SEQUENCE DURATION (s)	5,20	4,62	4,82

MANAGEMENT SUMMARY

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

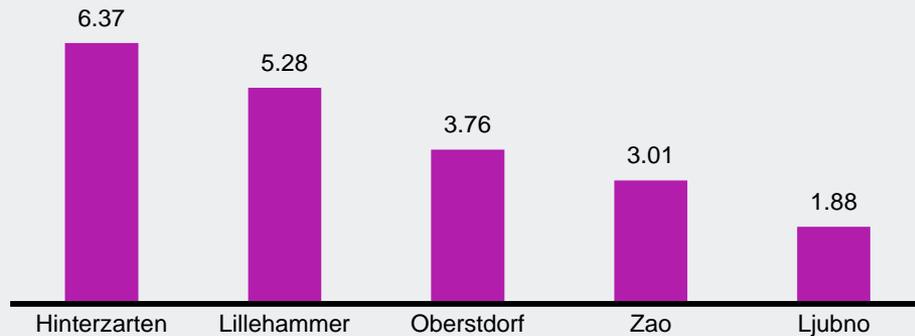


- Cumulative audience increased notably year-on-year (+24%), mainly thanks to wide-reaching news features on NHK and Nippon TV in Japan as well as on NRK 1 in Norway.
- Although Sara Takanashi and Yuki Ito did not finish this season as successful as the previous one, audience in Japan went up by 84 million (+21%). In Norway, home to newly crowned World Cup winner Maren Lundby, audience increased by 20 million (+122%).
- Yet, overall media impact declined compared to 2016/17. One reason is that Eurosport hardly aired any coverage this season, causing a decrease in broadcast time and media impact.
- Further reasons are a decline in audience of dedicated coverage on NHK BS-1 in Japan and less coverage on RTV SLO 2 (Slovenia), one of the top-5 channels last season. Except for Snowboarding, audiences on this channel decreased for all disciplines this year.

MANAGEMENT SUMMARY

Media Monitoring

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



- Live coverage of the second stage in Hinterzarten – hosting one team and one individual jumping – drew the most viewers of the 10 venues of this year's World Cup. With 5,18 million, the majority of audience stems from German public broadcaster ZDF.
- Zao is the event with the greatest overall media impact, mainly thanks to wide-reaching secondary coverage in host market Japan.
- Japan again ranks top in terms of media impact, despite a slight decline of 7% year-on-year. Together with Germany, which delivered comparable results to 2016/17, these two countries account for 84% of total media impact.
- Thanks to the sportive success of Maren Lundby, Norway overtook Slovenia and comes third in the country ranking.
- China, being part of the monitoring panel for the first time, also made some appreciable impact thanks to dedicated coverage on CCTV5 and CCTV5+.

MARKET RANKING – EVENT IMPRESSIONS (M)

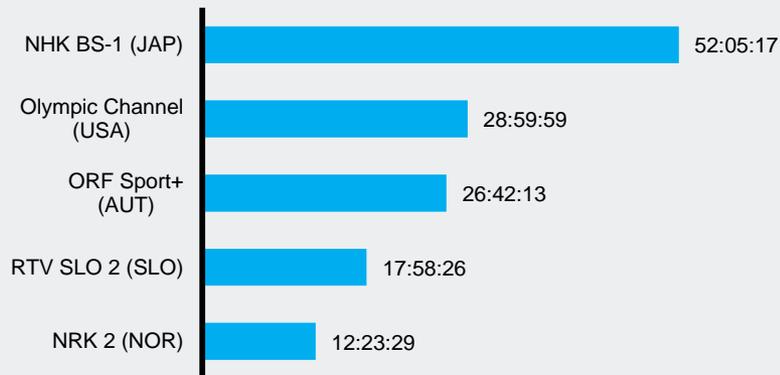


MANAGEMENT SUMMARY

Media Monitoring

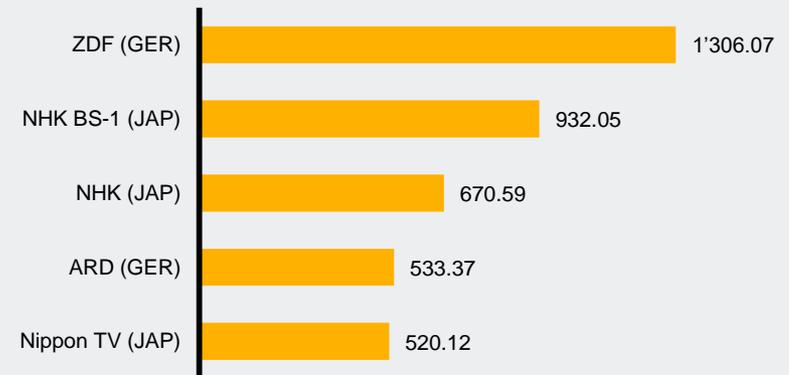
CHANNEL RANKING BY BROADCAST TIME (TOP 5)

(hh:mm:ss)



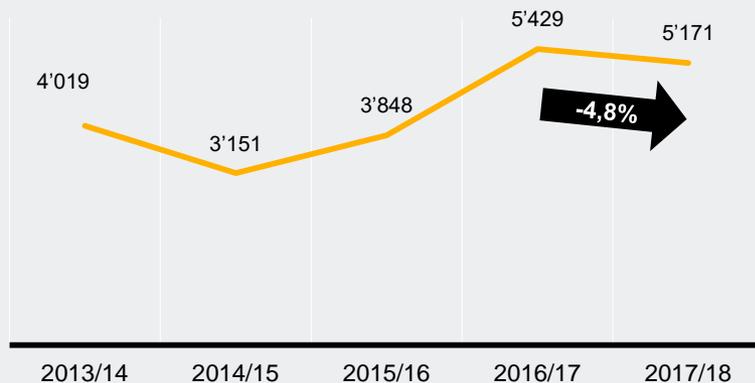
CHANNEL RANKING BY EVENT IMPRESSIONS (TOP 5)

(M)



WORLD CUP EVENT IMPRESSIONS TREND

(M)



- NHK BS-1 again ranks top of all channels in terms of broadcast time. Owing to a decline in broadcast time (-18%) and cum. audience (-51%), it was however replaced by German public broadcaster ZDF at the top of the media impact ranking.
- Thanks to wide-reaching news and sports magazine features, Nippon TV displaced RTV 2 SLO from 5th place so that German and Japanese channels dominate this season's media impact ranking.
- Olympic Channel, covering the ladies' Ski Jumping World Cup for the first time, aired dedicated coverage of 12 different competitions thus being the channel with the second highest broadcast time.
- For the first time since the 2014/15 season, total event impressions declined. Yet, this season achieved the second best performance in terms of media impact in the history of this World Cup and is still clearly above the average of previous years.



RESULT PRESENTATION

- **Media Monitoring**
- Sponsorship Analysis

MEDIA MONITORING

By Country



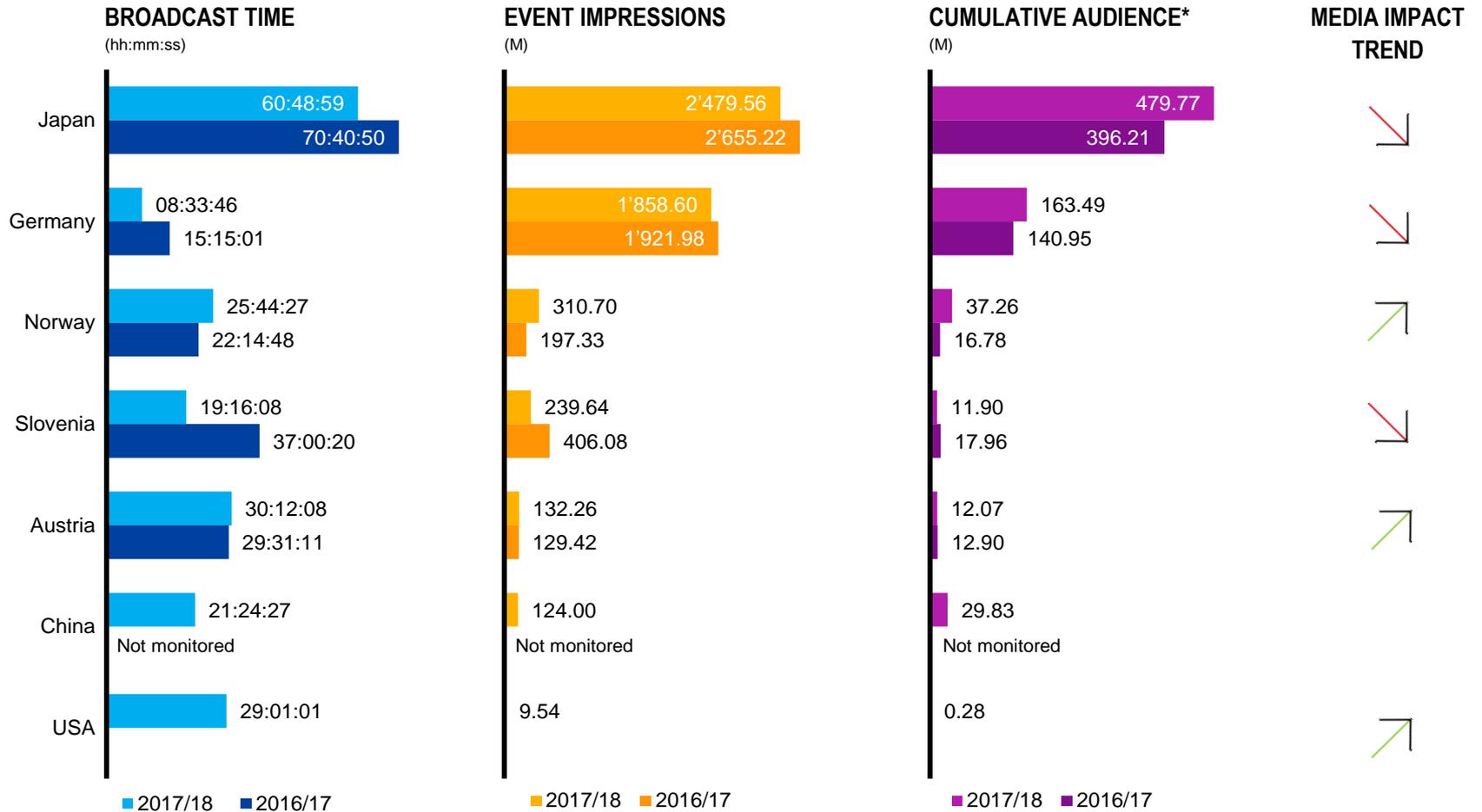
COUNTRY	NUMBER OF BROADCASTS (#)	CUMULATIVE AUDIENCE* (M)	BROADCAST TIME (hh:mm:ss)	ACTUAL PLAYING TIME (hh:mm:ss)	EVENT IMPRESSIONS (M)
Austria	91	12,07	30:12:08	26:10:34	132,26
China	48	29,83	21:24:27	19:38:34	124,00
Finland	1	0,06	00:00:31	00:00:00	0,06
France	3	0,01	00:00:46	00:00:20	0,01
Germany	123	163,49	08:33:46	06:38:54	1.858,60
Japan	414	479,77	60:48:59	47:09:14	2.479,56
Norway	391	37,26	25:44:27	20:52:01	310,70
Poland	5	2,56	00:04:05	00:00:00	1,82
Romania	7	1,05	00:06:26	00:03:08	2,03
Russia	1	0,11	00:00:26	00:00:00	0,10
Slovakia	2	0,40	00:00:52	00:00:34	0,35
Slovenia	137	11,90	19:16:08	16:15:42	239,64
South Korea	6	1,06	01:45:39	01:18:59	4,65
Sweden	2	1,23	00:04:46	00:00:00	7,49
Switzerland	4	0,10	00:02:58	00:00:20	0,43
USA	30	0,28	29:01:01	24:01:59	9,54
TOTAL	1.265	741,18	197:07:28	162:10:17	5.171,23

*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+/Estimations by Nielsen Sports
TV Media Evaluation - FIS Ski Jumping World Cup Ladies presented by Viessmann 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 Ski Jumping World Cup Ladies presented by Viessmann 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	12,07	30:12:08	132,26	12,90	29:31:11	129,42
China	29,83	21:24:27	124,00	-	-	-
Finland	0,06	00:00:31	0,06	1,81	03:30:51	3,73
France	0,01	00:00:46	0,01	0,31	11:17:15	6,06
Germany	163,49	08:33:46	1.858,60	140,95	15:15:01	1.921,98
Japan	479,77	60:48:59	2.479,56	396,21	70:40:50	2.655,22
Norway	37,26	25:44:27	310,70	16,78	22:14:48	197,33
Poland	2,56	00:04:05	1,82	9,73	03:23:01	46,51
Romania	1,05	00:06:26	2,03	-	-	-
Russia	0,11	00:00:26	0,10	0,10	18:19:38	13,40
Slovakia	0,40	00:00:52	0,35	0,02	03:30:00	2,31
Slovenia	11,90	19:16:08	239,64	17,96	37:00:20	406,08
South Korea	1,06	01:45:39	4,65	-	-	-
Sweden	1,23	00:04:46	7,49	0,02	03:16:00	1,99
Switzerland	0,10	00:02:58	0,43	0,02	03:30:00	2,10
USA	0,28	29:01:01	9,54	-	-	-
TOTAL	741,18	197:07:28	5.171,23	598,45	258:29:15	5.428,82

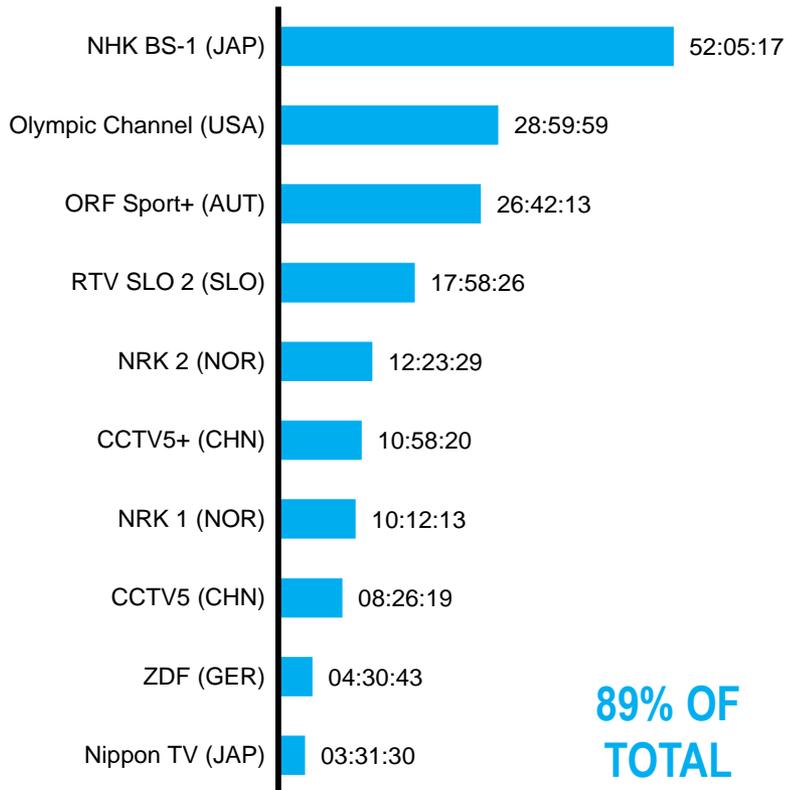
*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+/Estimations by Nielsen Sports
TV Media Evaluation - FIS Ski Jumping World Cup Ladies presented by Viessmann 2017/18

MEDIA MONITORING

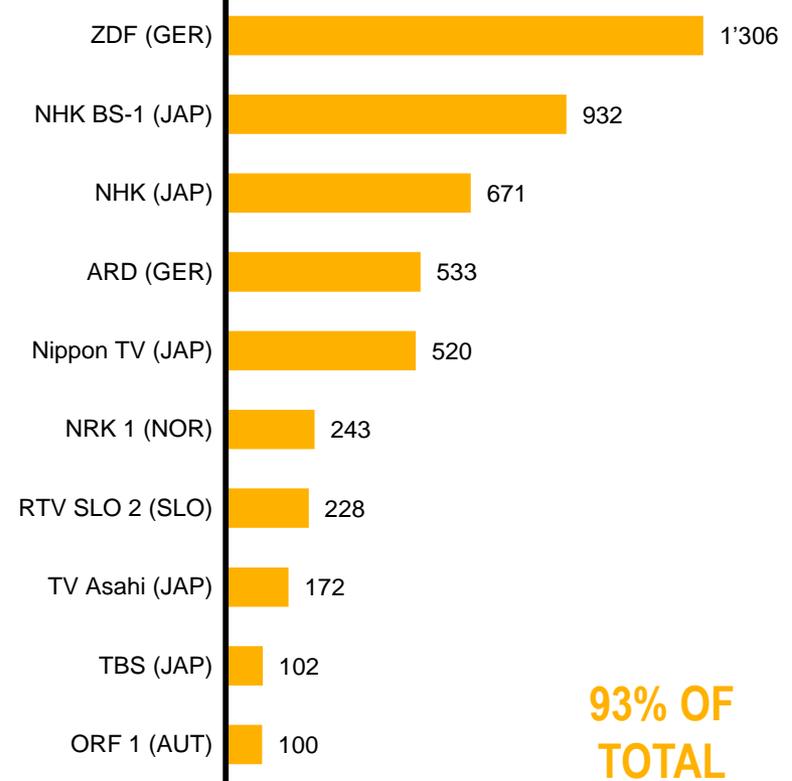
By Channel (Top 10)



BROADCAST TIME
(hh:mm:ss)

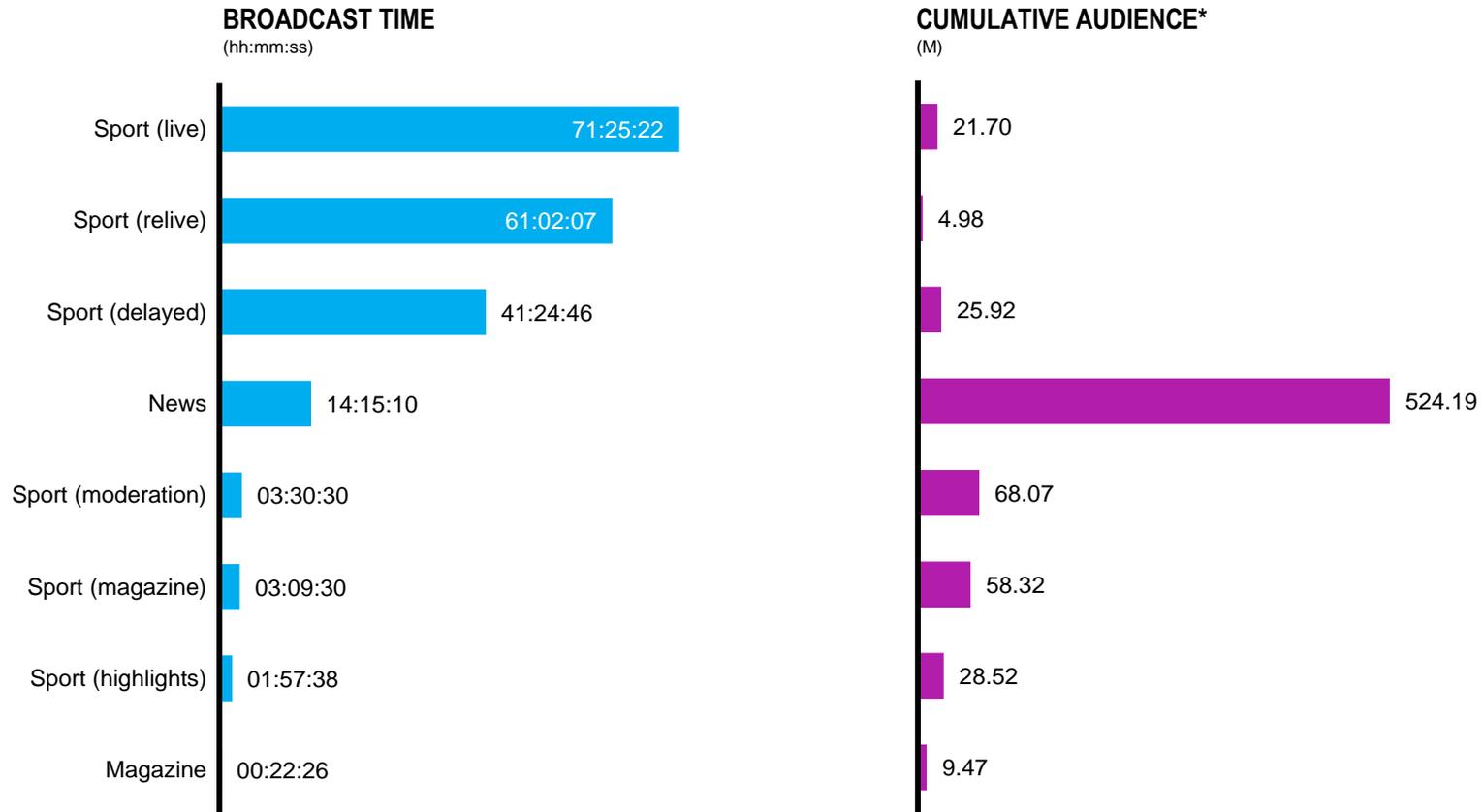


EVENT IMPRESSIONS
(M)



MEDIA MONITORING

By Programme Type



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

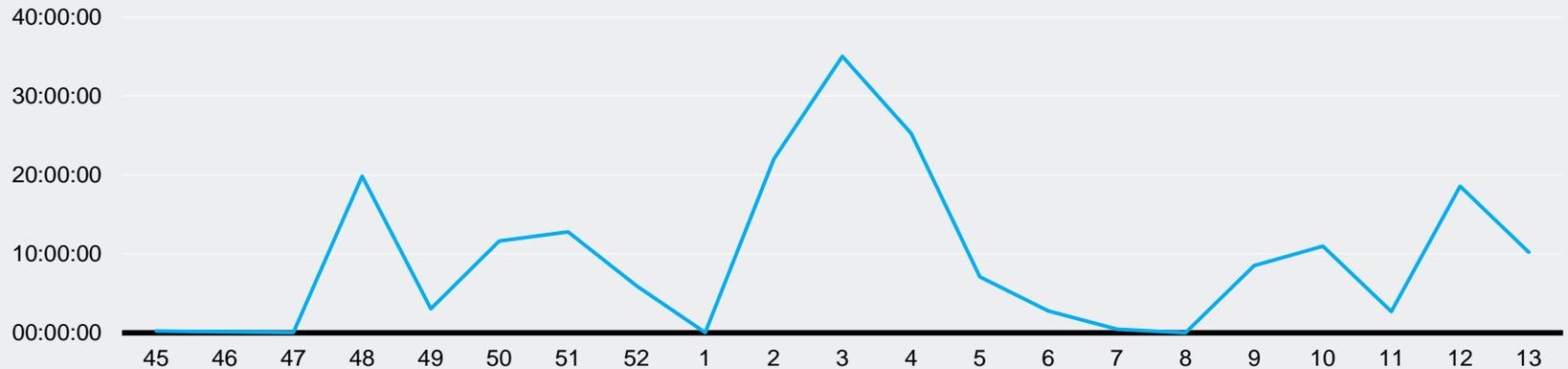
MEDIA MONITORING

Coverage Trend by Week



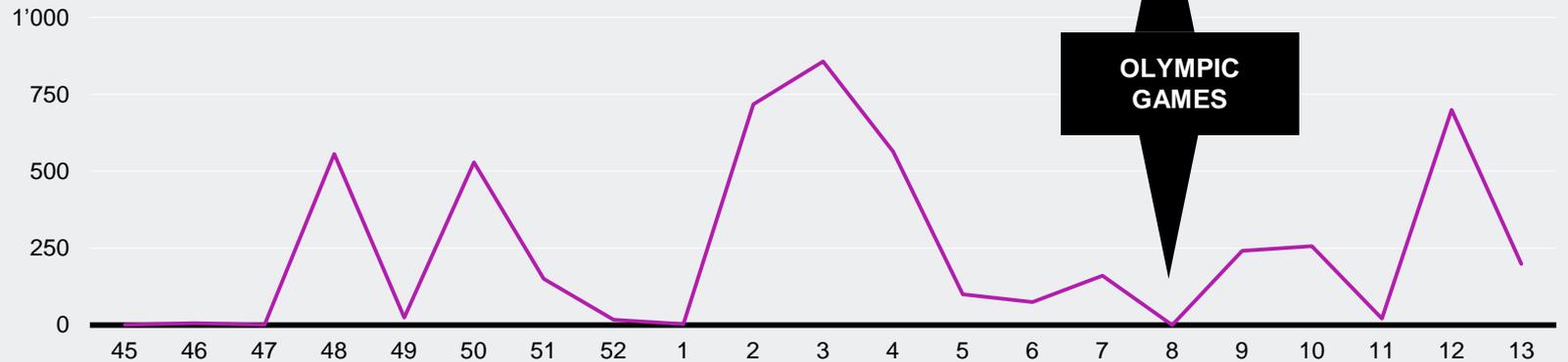
BROADCAST TIME

(hh:mm:ss)



EVENT IMPRESSIONS

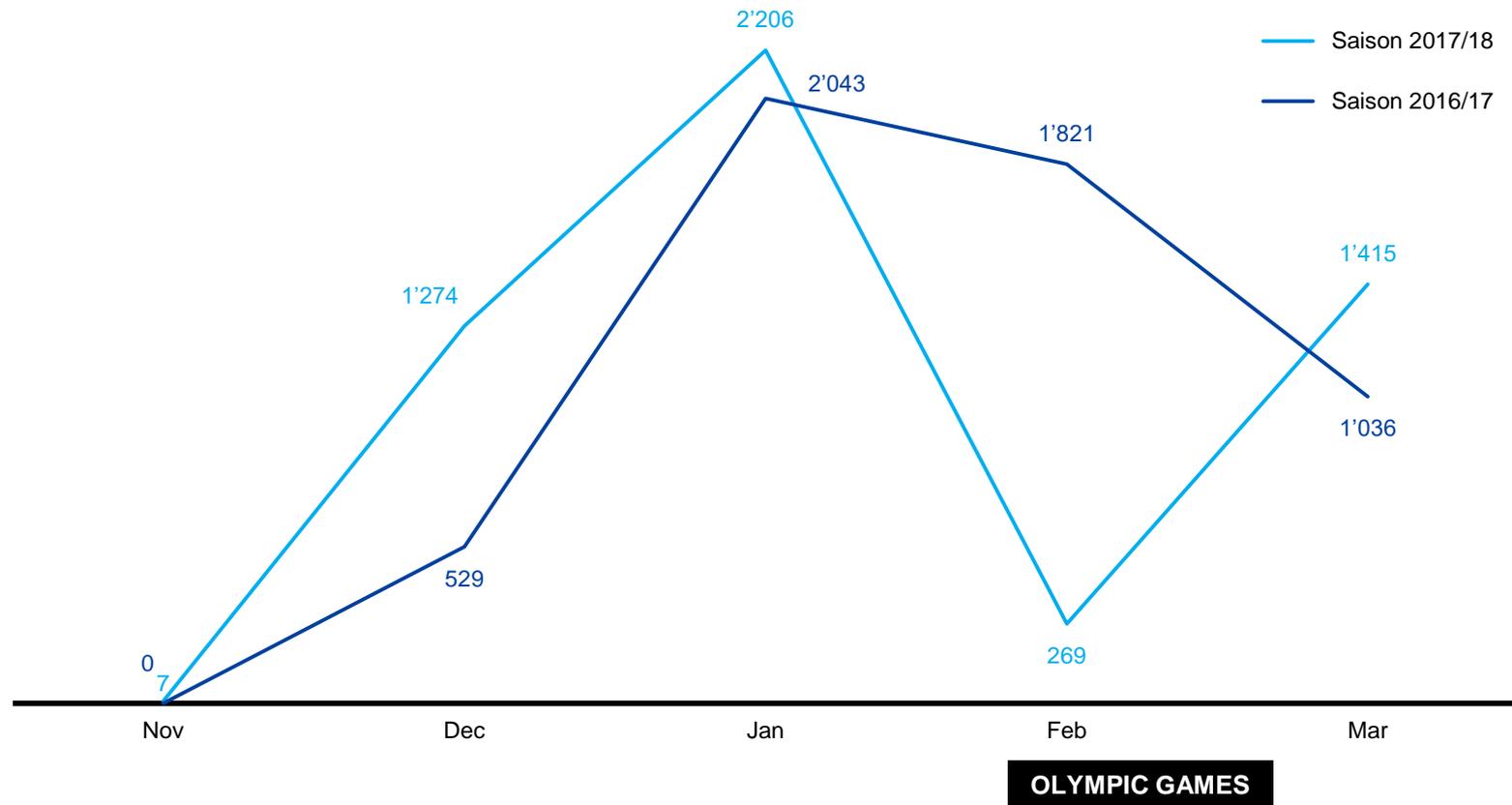
(M)



**OLYMPIC
GAMES**

MEDIA MONITORING

Season Comparison by Event Impression



nielsen

• • • • • • • •

Please note that this report is subject to copyright agreements. All rights are reserved by Nielsen Deutschland GmbH. In particular, copyright is reserved for the investigation design together with expert evaluations and assessment of the results, which are the intellectual property of Nielsen Deutschland GmbH. If it is intended that this study in full or excerpt will be published, prior written consent is required from the proprietors, Nielsen Deutschland GmbH.

Whilst proper due care and diligence has been taken in the preparation of this document, Nielsen Deutschland GmbH cannot guarantee the accuracy of the information contained and does not accept any liability for any loss or damage caused as a result of using information or recommendations contained within this document.

Apart from that our General Terms and Conditions, status as of June 2016 shall apply. Available at <http://niensensports.com/de/agb/>

Copyright ©2017 The Nielsen Company. Confidential and proprietary.