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FIS SKI JUMPING WORLD CUP MEN PRESENTED BY VIESSMANN 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 Ski Jumping World Cup Men 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 Men 2017/18 – TOTAL

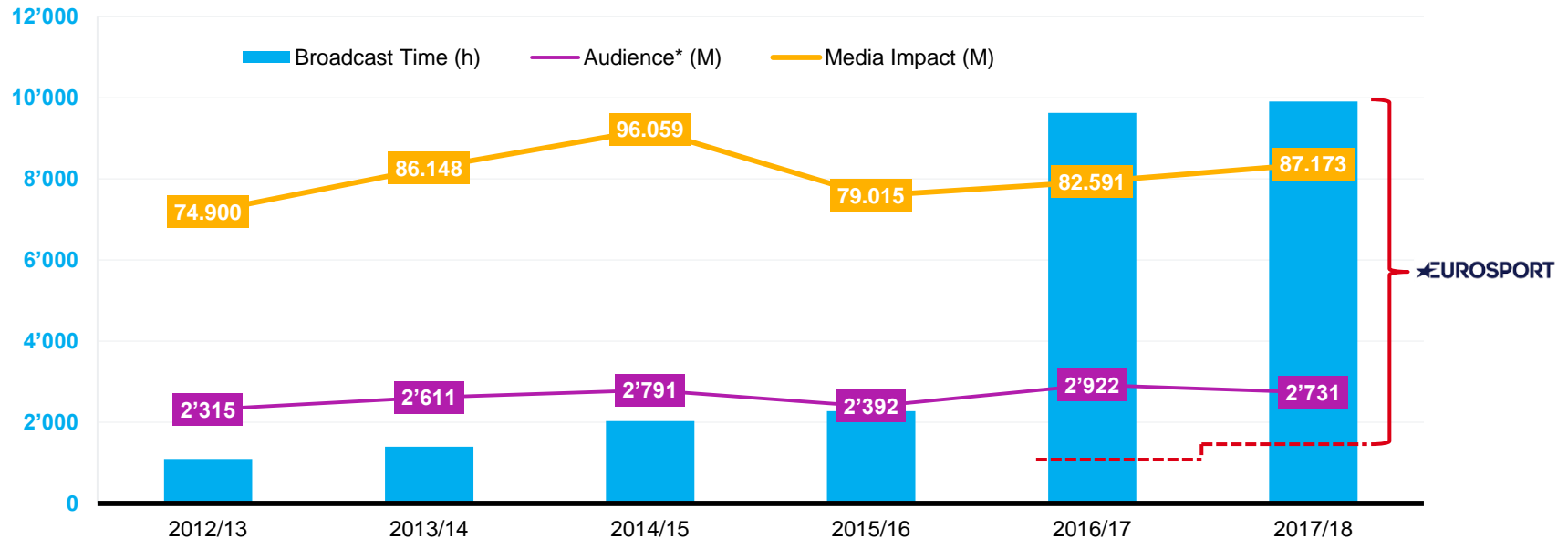


		LIVE	NON-LIVE	TOTAL
FIS SKI JUMPING WORLD CUP MEN 2017/18	CUMULATIVE AUDIENCE* (M)	444,82	2.285,68	2.730,50
	BROADCAST TIME (hh:mm:ss)	1732:13:21	8174:21:08	9906:34:30
	NUMBER OF BROADCASTS (#)	1.508	14.675	16.183
	EVENT IMPRESSIONS (M)	68.367,04	18.805,61	87.172,65
ALL FIS PARTNERS	VISIBILITY (hh:mm:ss)	1080:34:36	5235:53:25	6316:28:01
	NUMBER OF SEQUENCES (#)	936.141	4.550.589	5.486.730
	SPONSORSHIP IMPRESSIONS (M)	43.733,13	5.826,11	49.559,24
	100% MEDIA EQUIVALENCY (€)	221.528.435	59.295.075	280.823.510
	QI MEDIA VALUE (€)	50.866.243	13.799.104	64.665.347
	AVERAGE SEQUENCE DURATION (s)	4,16	4,14	4,14

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

MANAGEMENT SUMMARY

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



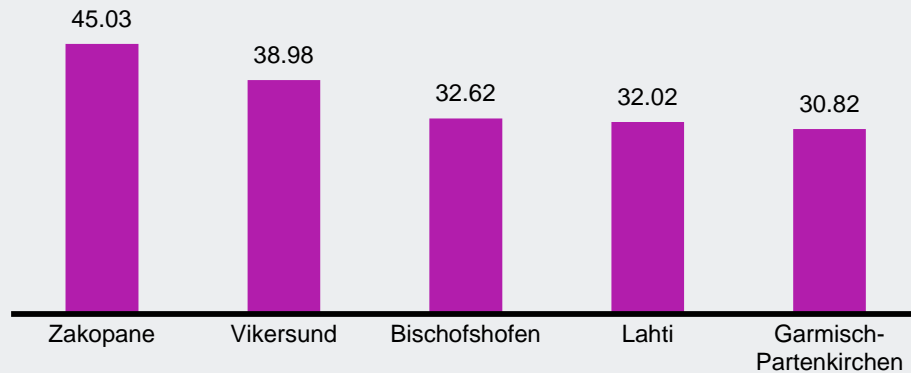
- Compared to the 2016/17 season, overall performance of TV coverage improved across the 21 markets monitored.
- Broadcast time increased moderately across various countries. With Poland, Germany and Austria, broadcast time went up in some of the most popular Ski Jumping markets.
- While cumulative audience increased in Germany (+37M), it declined in other markets such as Poland (-87M) and Japan (-57M). In line with a slight decline in number of events, there was less wide-reaching secondary coverage on public broadcasters TVP and NHK.
- In turn, audience of live coverage increased by 20M (+5%).
- This is also the reason for the rise in media impact. In Germany, for example, dedicated coverage on ARD & ZDF generated 15% more event impressions than in the previous season.

MANAGEMENT SUMMARY

Media Monitoring

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

(M)



- Thanks to wide-reaching coverage on TVP 1 in host market Poland, Zakopane outperforms all other World Cup stages in terms of live audience. Live airing of the jumping on Sunday reached 5,98M viewers with a market share of 38,7% on TVP 1.
- Vikersund, being the second last event of the season as well as the final of the Norwegian Raw Air, ranks second in terms of live audience. Live airing of the 1st run of the jumping on Saturday reached a market share of 65,4% on NRK 1 in Norway.
- Thanks to the sportive success of Polish athletes, Poland clearly leads the table in terms of media impact for the second consecutive year. Compared to 2016/17, event impressions (+1%) and number of broadcasts (+4%) increased again, but clearly not to the same extent as the year before.
- Media impact in Germany, which again ranks second, increased by 12% mainly thanks to a broader coverage on public broadcasters ARD & ZDF.

MARKET RANKING – EVENT IMPRESSIONS

(M)

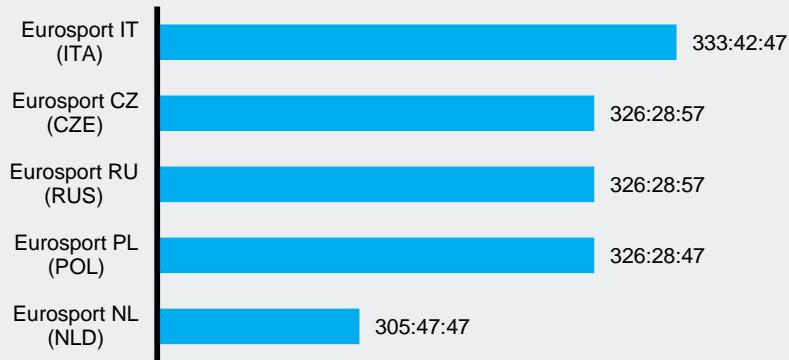
	NUMBER OF BROADCASTS	
Poland	46'219	2.187
Germany	26'674	1.859
Norway	3'059	1.798
Austria	2'985	1.405
Slovenia	2'063	1.287
Czech Republic	1'150	689
Slovakia	1'015	592
Russia	671	597
Romania	626	535
Finland	551	796
Netherlands	451	643
Italy	369	623
Switzerland	266	757
Sweden	231	559
Japan	223	204
Croatia	169	631
Denmark	154	422
France	137	480
China	116	40
USA	40	68
South Korea	4	11

MANAGEMENT SUMMARY

Media Monitoring

CHANNEL RANKING BY BROADCAST TIME (TOP 5)

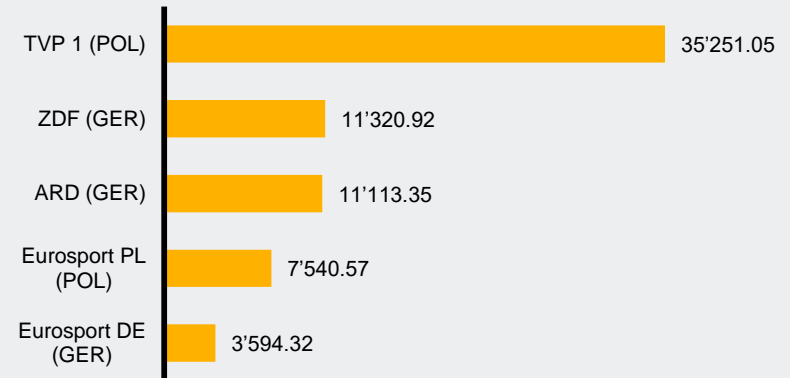
(hh:mm:ss)



Eurosport feeds only listed for their respective home markets

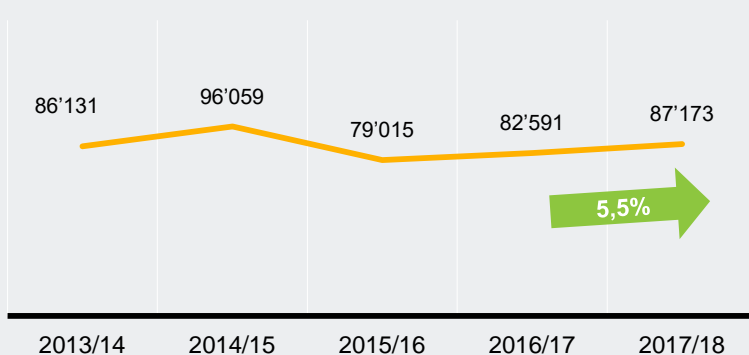
CHANNEL RANKING BY EVENT IMPRESSIONS (TOP 5)

(M)



WORLD CUP EVENT IMPRESSIONS TREND

(M)



- Coverage across the Eurosport network declined in comparison to the previous season which is partly due to a broader coverage of Alpine Skiing on Eurosport in the 2017/18 season.
- Still, Eurosport in Italy, Czech Republic and Russia contribute the largest share to total broadcast time.
- TVP 1 again is the channel with the greatest media impact, delivering almost exactly the same result as in 2016/17 (+0,9%).
- ARD & ZDF follow on rank 2 and 3, switching places compared to previous season. Together, the two German public broadcasters generated 15% more event impressions than in 2016/17.
- The positive trend in Germany is also the main reason for the third consecutive year-on-year increase in event impressions.



RESULT PRESENTATION

- **Media Monitoring**
- Media Monitoring – Focus Poland
- Media Monitoring – Focus 4HT & Raw Air
- Sponsorship Analysis

MEDIA MONITORING

By Country I



COUNTRY	NUMBER OF BROADCASTS (#)	CUMULATIVE AUDIENCE* (M)	BROADCAST TIME (hh:mm:ss)	ACTUAL PLAYING TIME (hh:mm:ss)	EVENT IMPRESSIONS (M)
Austria	1.405	111,00	685:47:26	580:36:56	2.984,65
China	40	8,16	20:28:52	19:23:20	115,77
Croatia	631	11,32	603:19:21	572:05:09	169,06
Czech Republic	689	24,61	591:53:48	559:31:29	1.149,55
Denmark	422	2,26	401:52:56	380:33:05	154,23
Finland	796	45,42	663:46:06	625:56:52	550,57
France	480	2,25	262:22:23	235:52:04	136,97
Germany	1.859	903,16	606:32:50	480:59:01	26.674,19
Italy	623	4,36	634:52:34	602:16:38	368,54
Japan	204	89,05	215:56:59	101:08:52	222,84
Netherlands	643	6,43	607:54:57	576:12:23	451,27

MEDIA MONITORING

By Country II

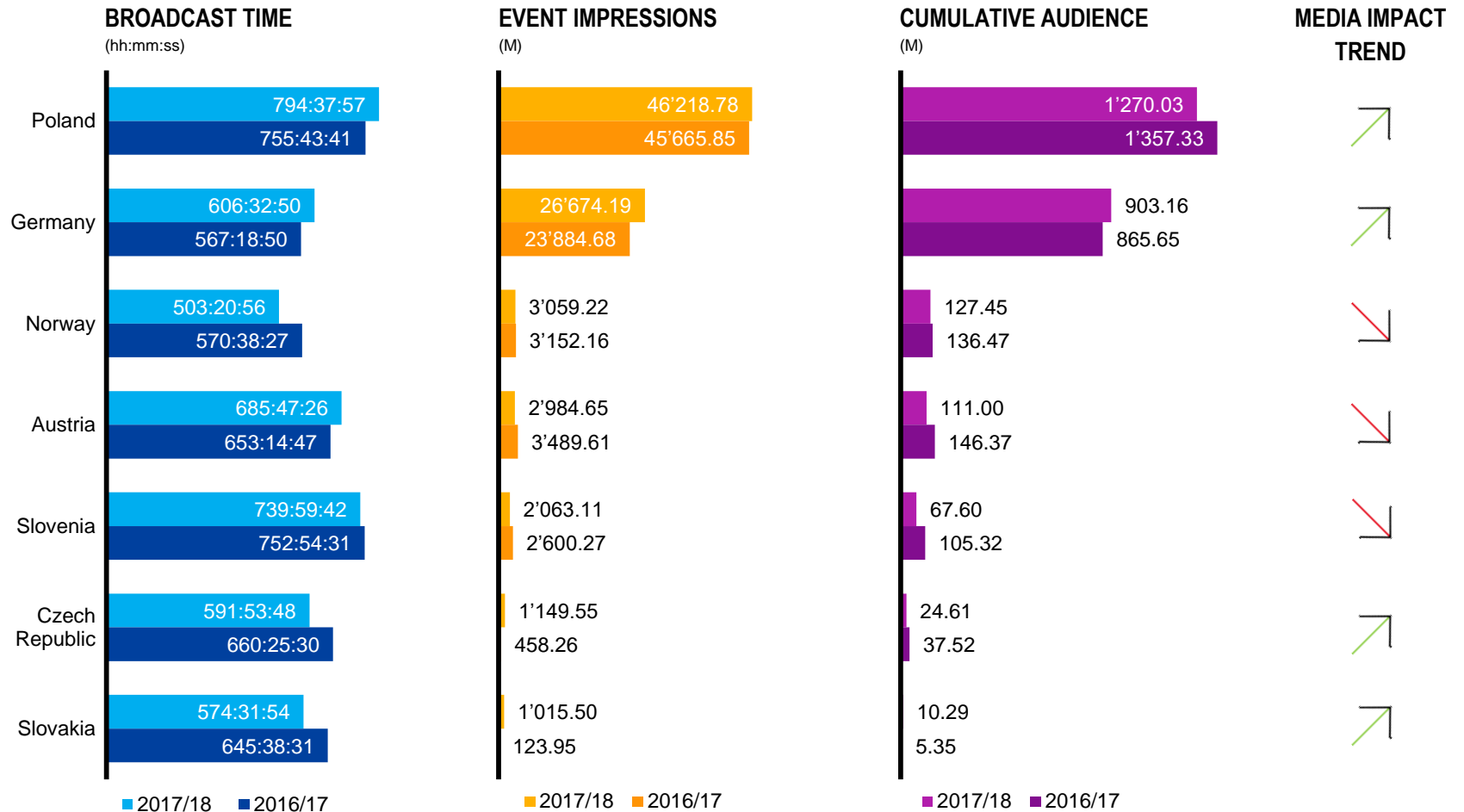


COUNTRY	NUMBER OF BROADCASTS (#)	CUMULATIVE AUDIENCE* (M)	BROADCAST TIME (hh:mm:ss)	ACTUAL PLAYING TIME (hh:mm:ss)	EVENT IMPRESSIONS (M)
Norway	1.798	127,45	503:20:56	449:48:39	3.059,22
Poland	2.187	1.270,03	794:37:57	697:44:57	46.218,78
Romania	535	7,28	545:03:37	495:13:06	626,32
Russia	597	8,21	577:37:12	546:43:45	670,98
Slovakia	592	10,29	574:31:54	544:06:44	1.015,50
Slovenia	1.287	67,60	739:59:42	682:14:14	2.063,11
South Korea	11	2,79	0:44:02	0:01:18	4,16
Sweden	559	7,33	508:06:54	480:48:03	230,68
Switzerland	757	14,37	281:12:55	250:25:24	266,06
USA	68	7,16	86:31:08	63:58:27	40,24
TOTAL	16.183	2.730,50	9906:34:30	8945:40:26	87.172,65



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 Men 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	111,00	685:47:26	2.984,65	146,37	653:14:47	3.489,61
China	8,16	20:28:52	115,77	-	-	-
Croatia	11,32	603:19:21	169,06	10,89	570:43:42	191,15
Czech Republic	24,61	591:53:48	1.149,55	37,52	660:25:30	458,26
Denmark	2,26	401:52:56	154,23	3,10	555:13:52	265,79
Finland	45,42	663:46:06	550,57	52,97	741:53:10	551,38
France	2,25	262:22:23	136,97	8,31	220:07:38	138,17
Germany	903,16	606:32:50	26.674,19	865,65	567:18:50	23.884,68
Italy	4,36	634:52:34	368,54	5,19	694:02:52	408,28
Japan	89,05	215:56:59	222,84	145,90	242:27:32	431,30
Netherlands	6,43	607:54:57	451,27	5,48	645:55:05	488,39

MEDIA MONITORING

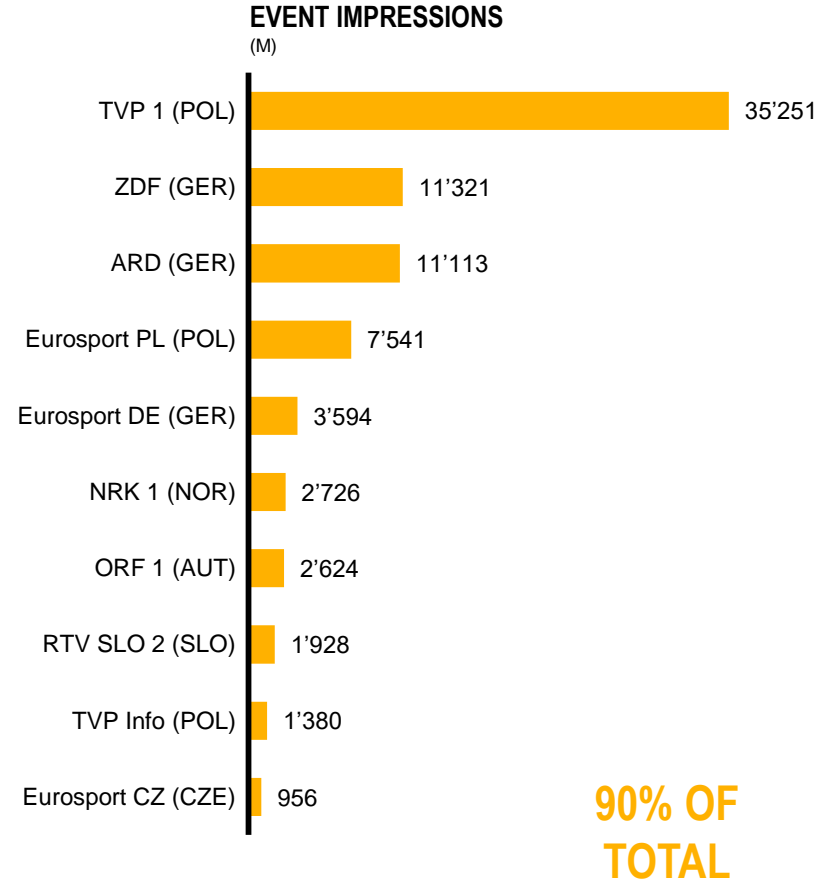
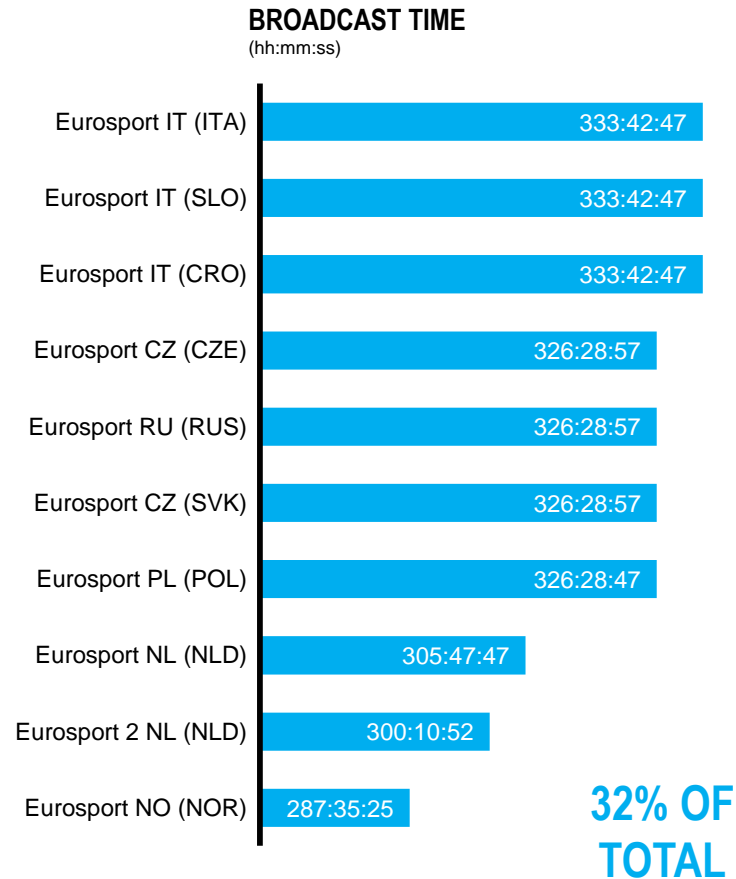
By Country Trend



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)
Norway	127,45	503:20:56	3.059,22	136,47	570:38:27	3.152,16
Poland	1.270,03	794:37:57	46.218,78	1.357,33	755:43:41	45.665,85
Romania	7,28	545:03:37	626,32	-	-	-
Russia	8,21	577:37:12	670,98	5,94	549:44:09	125,82
Slovakia	10,29	574:31:54	1.015,50	5,35	645:38:31	123,95
Slovenia	67,60	739:59:42	2.063,11	105,32	752:54:31	2.600,27
South Korea	2,79	0:44:02	4,16	-	-	-
Sweden	7,33	508:06:54	230,68	9,19	509:26:59	272,17
Switzerland	14,37	281:12:55	266,06	16,21	271:12:13	297,01
USA	7,16	86:31:08	40,24	0,32	4:57:47	37,19
TOTAL	2.730,50	9906:34:30	87.172,65	2.922,14	9625:40:11	82.591,26

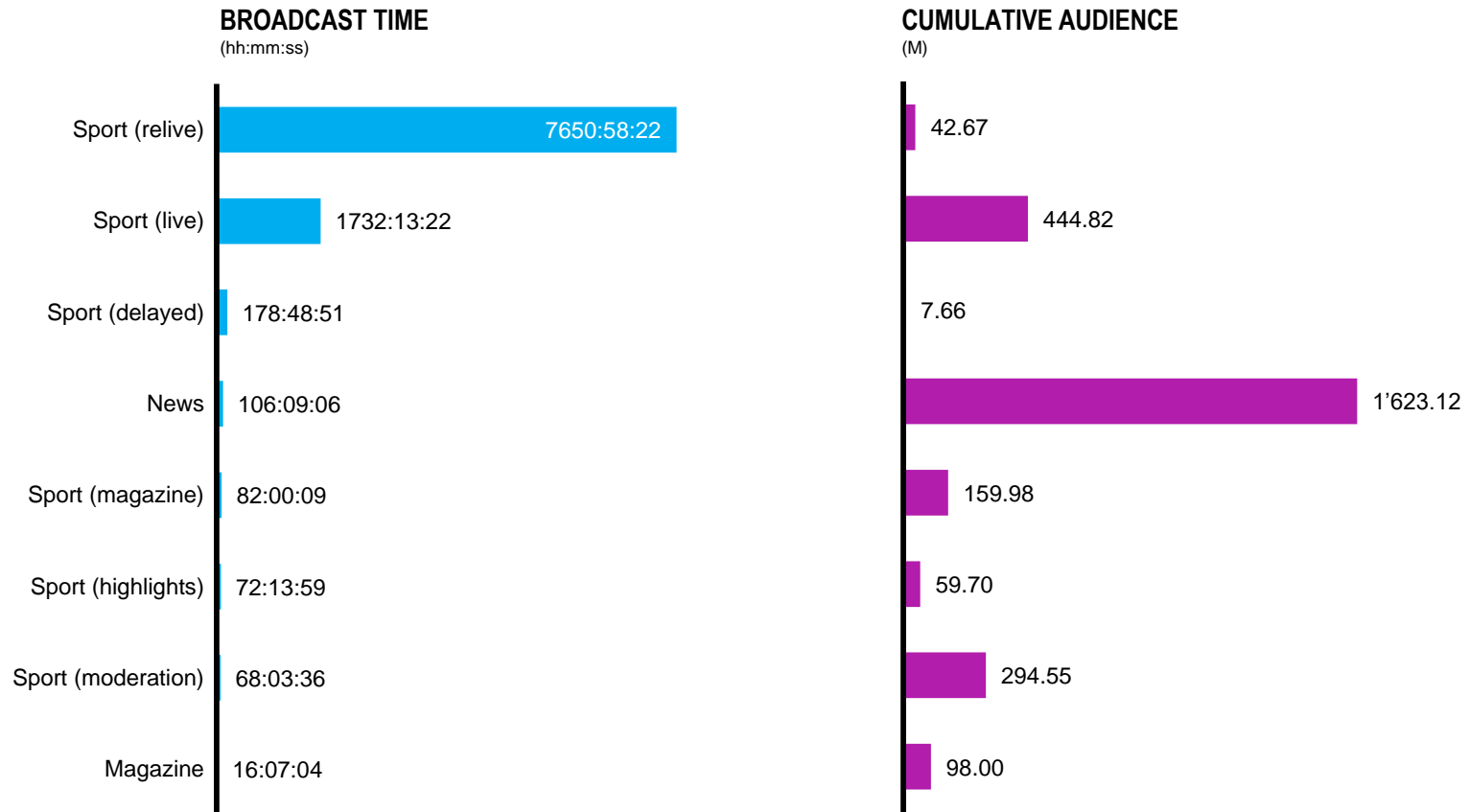
MEDIA MONITORING

By Channel (Top 10)



MEDIA MONITORING

By Programme Type



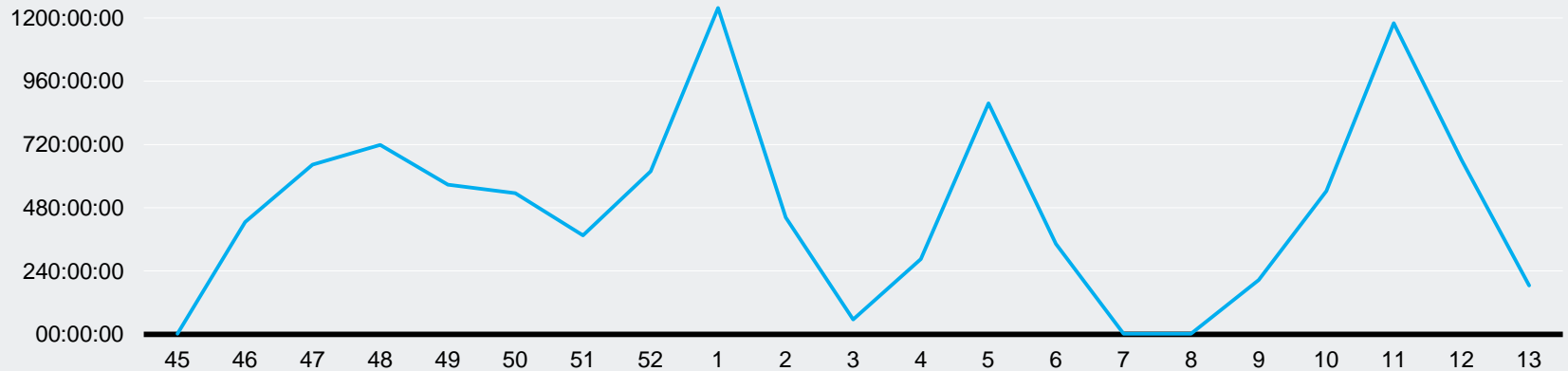
MEDIA MONITORING

Coverage Trend by Calendar Week



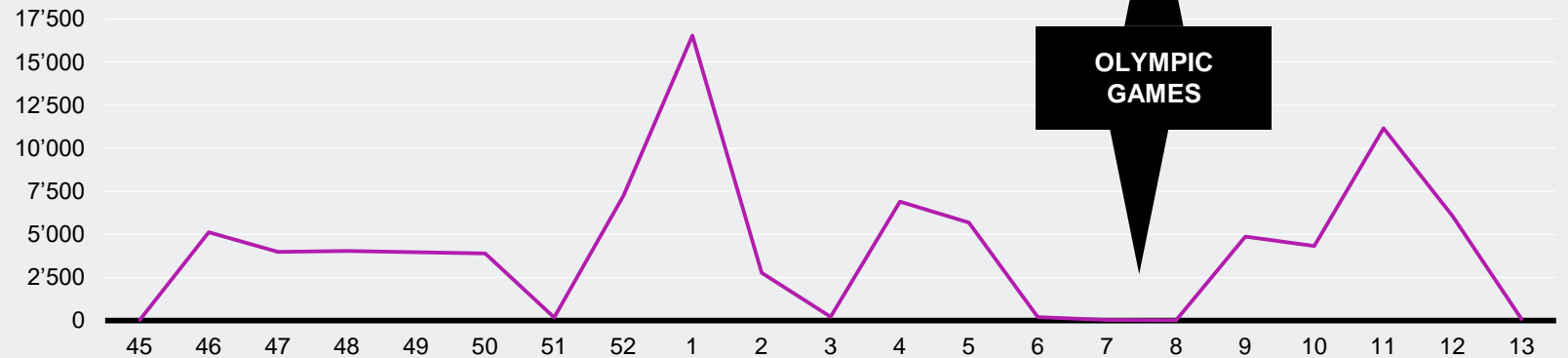
BROADCAST TIME

(hh:mm:ss)



EVENT IMPRESSIONS

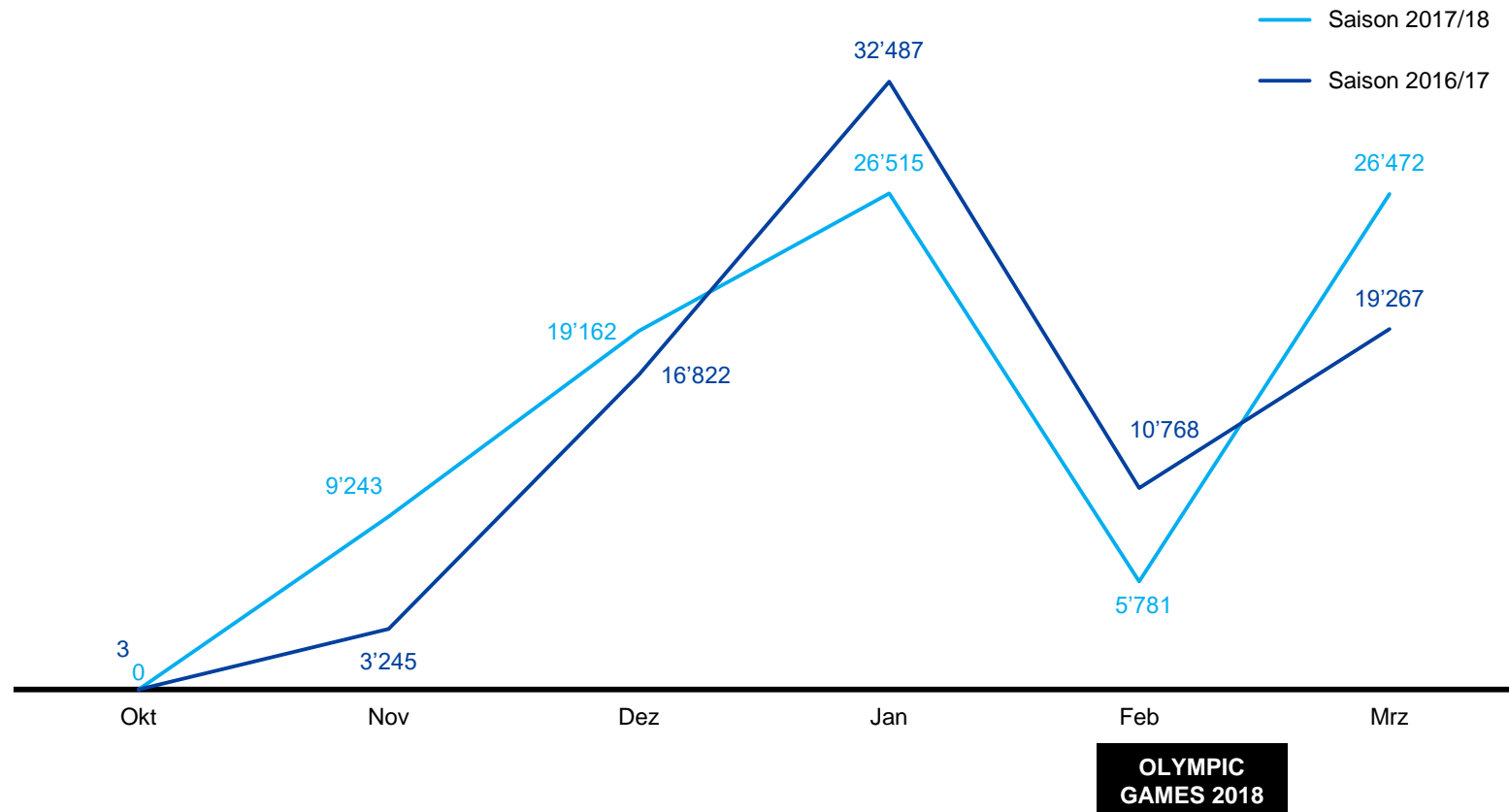
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**OLYMPIC
GAMES**

MEDIA MONITORING

Season Comparison by Event Impression



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