Medialization of CISM

CISM Symposium 2008 - Sofia

Mr. Holger Haas, 09/24/2008
Mission Analysis
Mission Analysis – Medialization of CISM

- intent
- specified and implied tasks
- constraints and restraints
- Has there been a fundamental change in the situation?
- conclusions
Analysis of the market environment
Circle

CISM

Sponsors

Media
Sports catches the public’s interest because of...

- heroes
- creating an event
- change of regulations
- identification
Criteria of a successful sport in the media

- hero
- sports fans
- tradition
- own experience
- clean sport (no doping)
- internationality
- sustainability
- positive image
Positive Image

the 3 aspects of a brand

- popularity
- image
- benefit
World of Red Bull

www.worb.tv
Factors to increase media presence

- creating an event
- play mode
- professional management
- media cooperation
- high quality TV - productions

media product
Media Product

Rights

Message

Distribution

Production

Media Product

Media Product

Rights

Distribution

Production

Message
Unique camera perspectives - Camera Moving Systems

Ski – Jumping

- Speed Cam
- Pylon Cam

Video
Premiere Sportportal

Optionskanäle
1 Fußball Stuttgart - Bielefeld
2 Eishockey Mannheim - Frankfurt
3 News Sport Infokanal

Es folgt
1 Fußball 17:30
Alle Spiele, alle Tore
2 Formel 1 18:45
Großer Preis von Bahrain

Bundesliga, UEFA Champions League und Formel 1 können Sie auch bei PREMIERE DIREKT bestellen. Mehr Infos auf dem Kanal PREMIERE DIREKT oder unter www.premiere.de/direkt
Made for Mobile

- **picture MMS**
  - picture and text slideshow

- **video MMS**
  - 10 sec. slow motion goal replay

- **video Stream**
  - 60 sec. highlight reel for each game
Evaluation of the competition in relation to the market environment
Popular sports with public interest
TOP 10 sports live* in 2006

Transmission period

<table>
<thead>
<tr>
<th>Sport</th>
<th>Sendedauer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Soccer</td>
<td>704:35:43</td>
</tr>
<tr>
<td>Cycling</td>
<td>323:19:32</td>
</tr>
<tr>
<td>Tennis</td>
<td>178:03:03</td>
</tr>
<tr>
<td>Track And field</td>
<td>165:24:08</td>
</tr>
<tr>
<td>Automotive Sports</td>
<td>140:54:27</td>
</tr>
<tr>
<td>Motorcycle Sports</td>
<td>111:30:57</td>
</tr>
<tr>
<td>Horseback Riding</td>
<td>91:01:29</td>
</tr>
<tr>
<td>Handball</td>
<td>83:24:06</td>
</tr>
<tr>
<td>Field Hockey</td>
<td>77:32:50</td>
</tr>
<tr>
<td>Biathlon</td>
<td>75:50:58</td>
</tr>
</tbody>
</table>

Quelle: IFM

* Basis: deutsches Free-TV, nur live, IFM-Standardsenderpanel, 01.01. - 30.09.2006, kumuliert, Zuschauer ab 14 Jahren
TOP 10 Sports live* in 2006

Media penetration in m.

<table>
<thead>
<tr>
<th>Sport</th>
<th>Media Penetration in m.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Soccer</td>
<td>1455,01</td>
</tr>
<tr>
<td>Automotive Sports</td>
<td>265,67</td>
</tr>
<tr>
<td>Cycling</td>
<td>152,09</td>
</tr>
<tr>
<td>Ski Jumping</td>
<td>102,84</td>
</tr>
<tr>
<td>Biathlon</td>
<td>100,94</td>
</tr>
<tr>
<td>Alpine Skiing</td>
<td>74,96</td>
</tr>
<tr>
<td>Boxing</td>
<td>67,50</td>
</tr>
<tr>
<td>Track And field</td>
<td>64,19</td>
</tr>
<tr>
<td>Nordic Combined</td>
<td>47,50</td>
</tr>
<tr>
<td>Cross-Country Skiing</td>
<td>39,09</td>
</tr>
</tbody>
</table>

Quelle: IFM

* Basis: deutsches Free-TV, nur live, IFM-Standardsenderpanel, 01.01. - 30.09.2006, kumuliert, Zuschauer ab 14 Jahren
Soccer dominates the national sports scene

<table>
<thead>
<tr>
<th>year</th>
<th>sportsformat</th>
<th>viewers in mio.</th>
<th>marketshare in %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1997</td>
<td>FORMEL I - GP EUROPA</td>
<td>15,41</td>
<td>68</td>
</tr>
<tr>
<td>1998</td>
<td>FB WM live: Deutschland - USA</td>
<td>24,37</td>
<td>70,1</td>
</tr>
<tr>
<td>1999</td>
<td>FORMEL 1 - GP BRASILIEN</td>
<td>13,69</td>
<td>41,9</td>
</tr>
<tr>
<td>2000</td>
<td>FB EM: Frankreich - Italien</td>
<td>20,43</td>
<td>64,2</td>
</tr>
<tr>
<td>2001</td>
<td>FB WM-Quali. Deutschland - Ukraine</td>
<td>18,13</td>
<td>52,3</td>
</tr>
<tr>
<td>2002</td>
<td>FB WM live: Deutschland-Brasilien</td>
<td>27,09</td>
<td>88</td>
</tr>
<tr>
<td>2003</td>
<td>Quali FB EM: Deutschland - Schottland</td>
<td>15,49</td>
<td>48,8</td>
</tr>
<tr>
<td>2004</td>
<td>FB EM: Portugal-Griechenland</td>
<td>25,4</td>
<td>68,5</td>
</tr>
<tr>
<td>2005</td>
<td>FB Confederation-Cup: Deutschland vs. Argentinien</td>
<td>13,09</td>
<td>44,5</td>
</tr>
<tr>
<td>2006</td>
<td>FB WM live: Deutschland – Italien</td>
<td>29,66</td>
<td>84,1</td>
</tr>
<tr>
<td>2007</td>
<td>Handball WM live: Deutschland – Polen</td>
<td>16,16</td>
<td>58,3</td>
</tr>
</tbody>
</table>
Costs of TV-rights – Is there an end?

Soccer World Cup

€ in Mio.


23.01 30.17 58.29 67.49 88.96 250.00 180.00

Premium Sports in Free- and Pay – TV not financially feasible through advertising only

* bis 1998 umgerechnet von DM in €
** 25 Spiele der WM 2002 + Option für WM 2006
Olympic Revenue Sources 2001 - 2004

- US$ 1459 million - sponsorships
- US$ 441 million - ticketing
- US$ 86.5 million - licensing
- Total: US$ 2229 million
Evaluation of the Friendly Situation in relation to the market environment
Goals of CISM

- very noble goals

- awareness level
- media tools
- quality of CISM events
- heroes (figureheads)
- no scientifically proven studies about the awareness level of CISM

media and public do not notice CISM
CISM

- military world games
- 25 word championships
- own sport – pentathlon
Comparison of Forces
### Leaders in TV - ratings are struggling

<table>
<thead>
<tr>
<th>Sports</th>
<th>Highest TV – ratings (year)</th>
<th>Viewers (m)</th>
<th>Current status</th>
<th>Viewers (m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tennis</td>
<td>1985</td>
<td>11,6</td>
<td>2007</td>
<td>0,77*</td>
</tr>
<tr>
<td>Boxing</td>
<td>1995</td>
<td>17,59</td>
<td>2005</td>
<td>7,78**</td>
</tr>
<tr>
<td>Formula 1</td>
<td>2001</td>
<td>9,65</td>
<td>2007</td>
<td>5,9</td>
</tr>
<tr>
<td>Ski jumping***</td>
<td>2002</td>
<td>10,5</td>
<td>2008</td>
<td>4,8</td>
</tr>
<tr>
<td>Cycling*****</td>
<td>2003</td>
<td>6,2</td>
<td>2007</td>
<td>0,82</td>
</tr>
</tbody>
</table>

*Wimbledon-Finale Roger Federer – Rafael Nadal
** WM-Kampf Nikolai Walujew - John Ruiz
*** Vierschanzentournee
**** Tour de France
Chance for “hidden champions”
Criteria of a successful sport in the media – table tennis

- hero
- sports fans
- tradition
- own experience
- clean sport (no doping)
- internationality
- sustainability
- positive image
PLAZAMEDIA and Contenthouse – strategic partners

Previous regulations | Adaption of regulation
---|---
4 players / Team | 3 players / Team
2 games played simultaneously | 1 Centrecourt (only one game at a time)
Bundesligasystem | Modified Olympic system
Playing time not calculable | Playing time planable
- internet/DSL account growing market
- IPTV – Future market
- „Free-TV“ online
- content available worldwide and 24/7 (live + on demand)

☞ TOP SPORTS in TOP QUALITY every time and everywhere
Multichannel advertising

Networked advertising

League – right to a name

Sports venues  Testimonial  TV  Mobile  Online – www.DTTL.tv

Integrated portfolio for marketing- and sponsoring-solutions!
Establishment and Comparison of Possible Friendly Courses of Action
Summary

- network – CISM (Sport), media, sponsors
- champions are struggling – Always a demand for new and attractive content in the sports world today
- CISM has extraordinary potential
- distribution through various channels (Internet, radio, print, mobile,...)
- lots of opportunities for a successful media product that is attractive for sponsors
Vision – CISM News 2010
Contact details

Thank you for your attention!

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