

**Professional MotorSport World Expo
Cologne, 7th November 2007**



**The current state of motor sports and
motor sports sponsorship
from a global media perspective**

Adrian Bach, IFM International

- 1. Introduction**
- 2. Top Sports: Status and potential of motor sports in different markets**
- 3. Media platform provided by selected series – key performance indicators**
- 4. Team sponsorships**
- 5. Conclusion**



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1. IFM – Profile



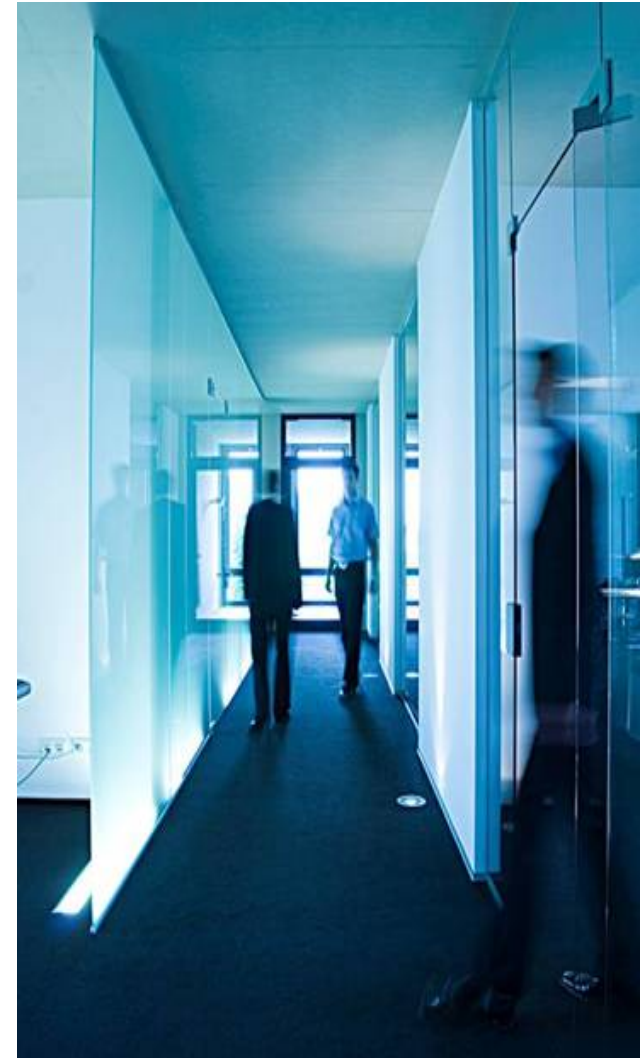
- **Since 1988 - one of the leading sports media analysts and service provider in sports communication**
- **Independent, quantitative and qualitative evaluation of sports TV broadcasts and sponsorship activities**
- **Unrivalled 24/7 recording and scanning of all TV programme formats with sports content (sports broadcasts, news, magazines etc.)**
- **Full digital analysis of sports related content**
- **Monitoring of more than 800 TV channels in 80 countries**
- **Broadcast and audience data for over 1200 channels worldwide**
- **Provides the global facts for: sponsors, series, teams, federations, governing bodies, agencies, TV networks, event organizers and rights holders**



1. _more than research! IFM Portfolio of Services

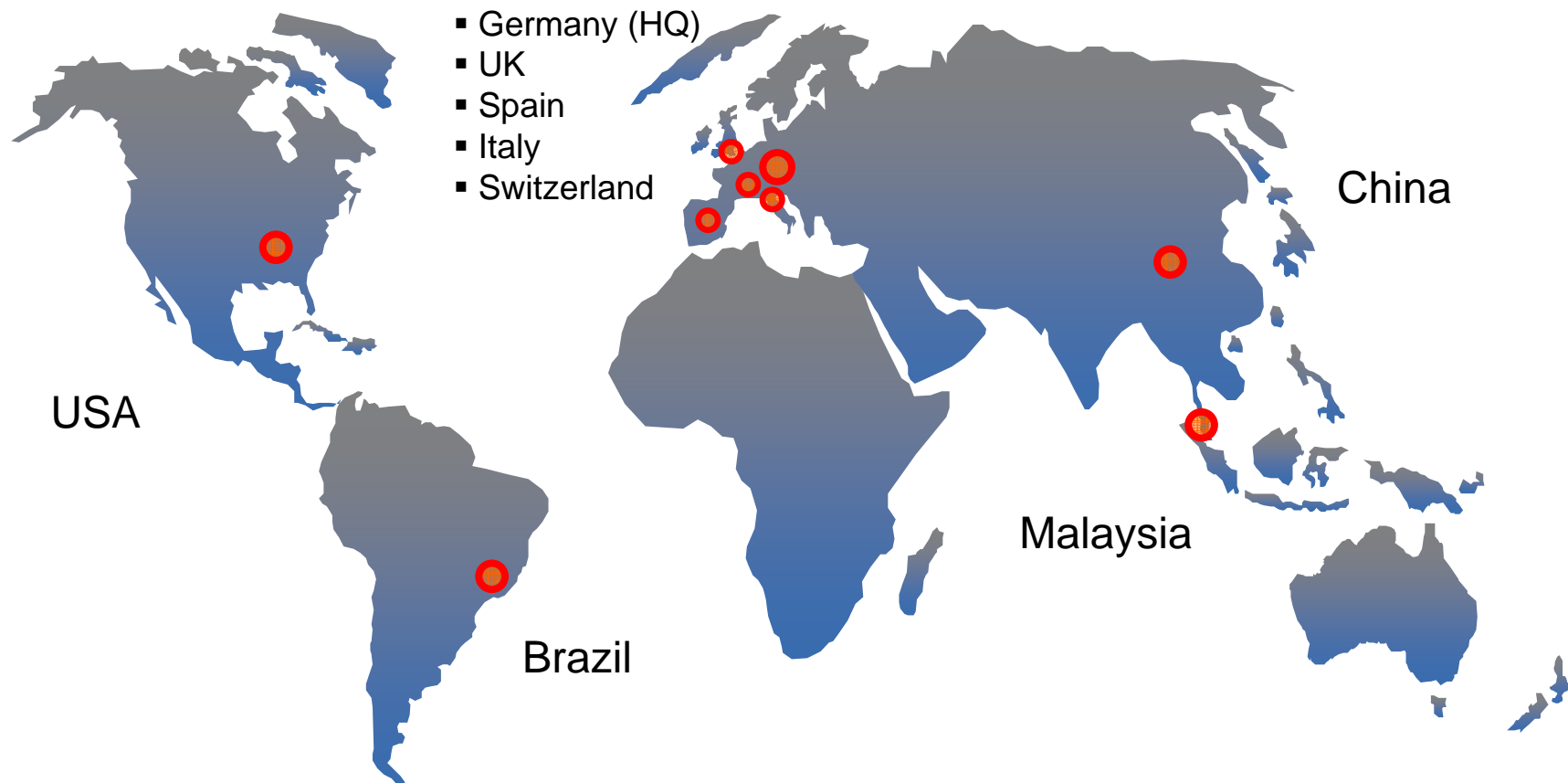


- **Broadcast & audience analysis**
- **Brand tracking & sponsorship evaluation**
- **Athlete's Analysis**
- **Benchmarking & strategic counsel**
- **Compliance monitoring**
- **Commercial screening**
- **Historical database**
- **Impact analysis**
- **Market and consumer research**
- **Pre-event analysis**
- **Press and internet monitoring**
- **Quick reporting & overnight analyses**
- **Rights valuation**
- **Target groups & socio-demographic profiles**



1. IFM – Global Network

- Independent and specialist know-how in all major markets around the world
- Affiliates in virtually every other market on all continents



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2. Top Sports



Top TV Sports: Top 5 + motor sports

Ranking based on IFM Event Index (i.e. broadcast duration and corresponding TV audience)

Country	Ranking of Motor Sports in Top 10 Sports on TV
France	5 (car racing)
Germany	3 (car racing)
Italy	2 (car racing) + 4 (motor cycling)
Spain	2 (car racing) + 4 (motor cycling)
UK	6 (car racing) + 10 (motor cycling)

Base: Dedicated coverage on free TV 2006, winter sports excl. icehockey, pub sports incl. darts, pool and snooker, equestrian incl. horse racing

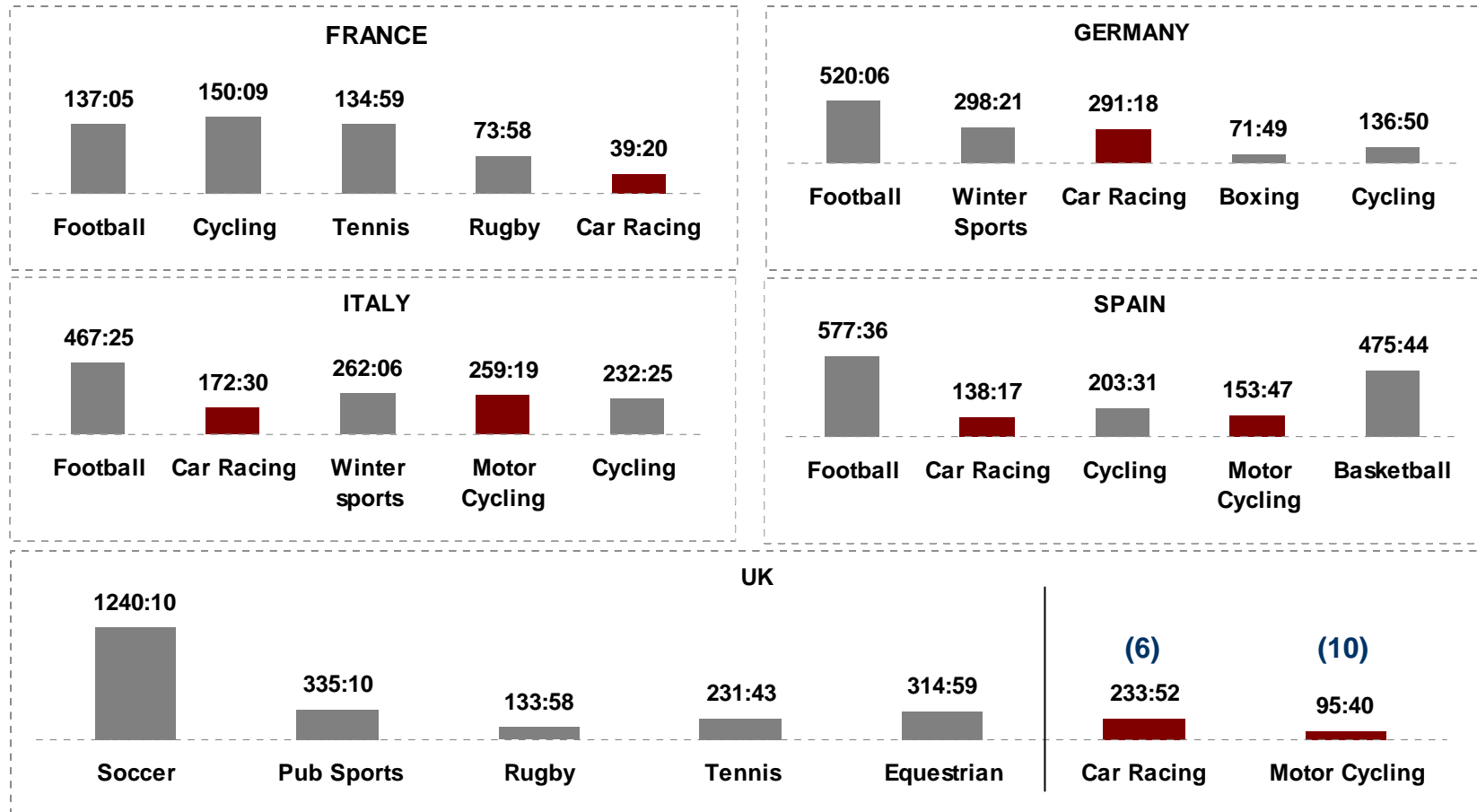
2. Top Sports



Top TV Sports: Top 5 + motor sports

Broadcast hours per sport

Ranking based on IFM Event Index (i.e. broadcast duration and corresponding TV audience)

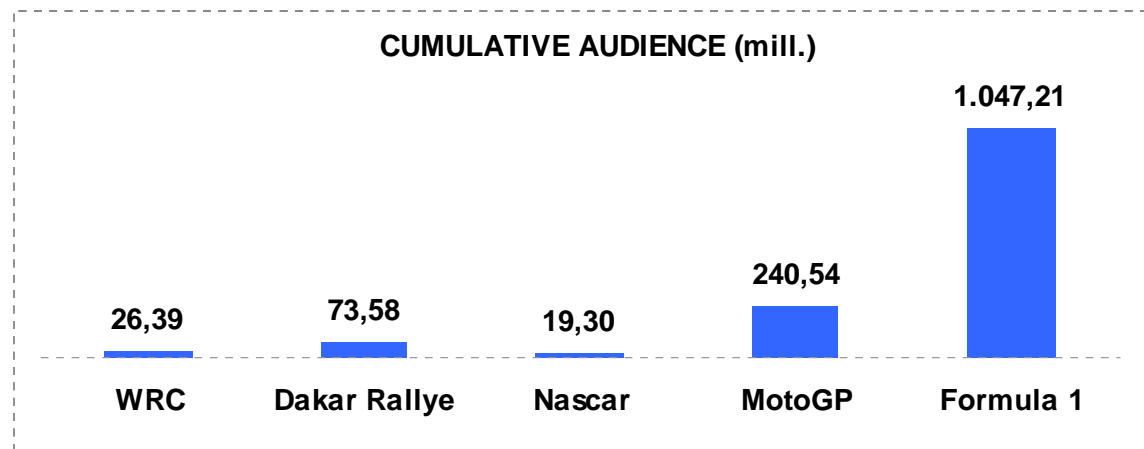
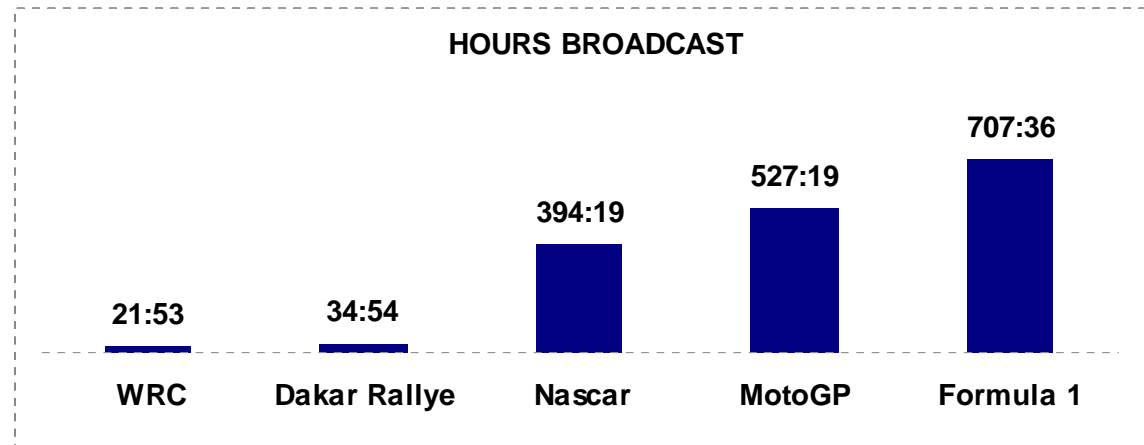


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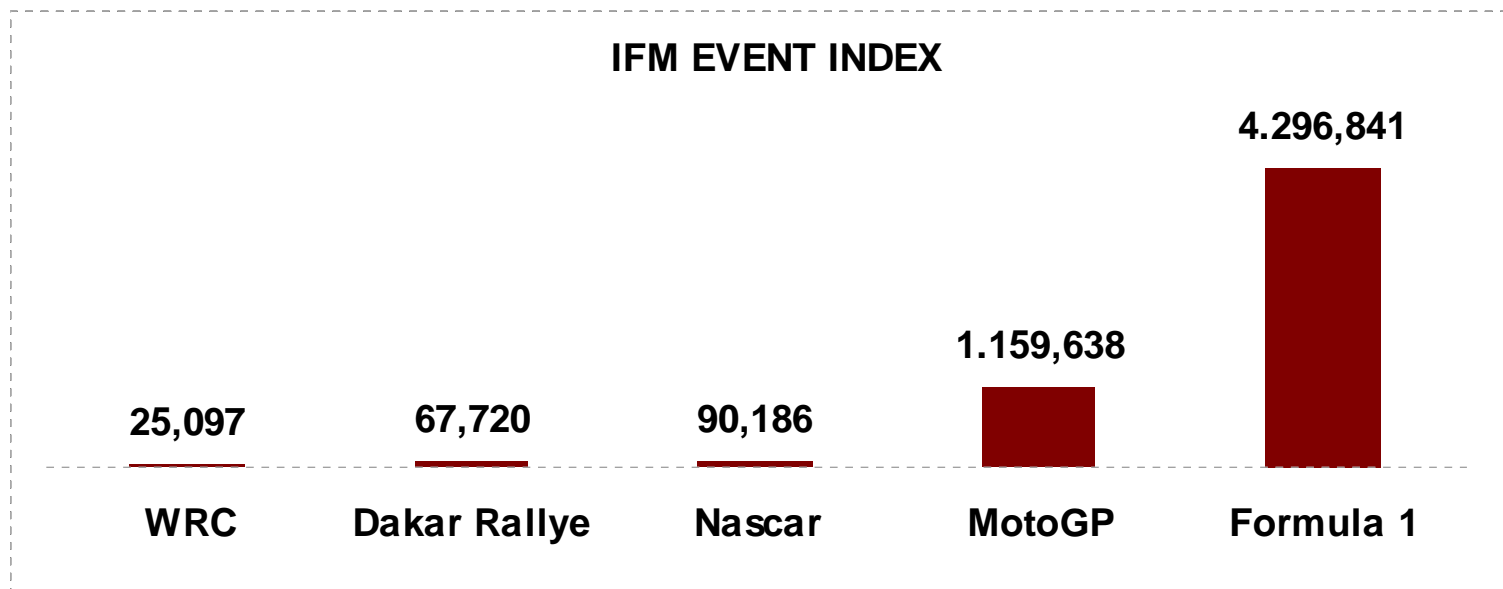
3. Media Platform



IFM Event Index - calculated per programme:
Duration of broadcast * average programme audience / 1000

Base: Dedicated coverage on free TV 2006/2007 in France, Germany, Italy, Spain and the UK

3. Media Platform



	WRC	Dakar Rallye	Nascar	Moto GP	Formula 1
France	1,741	54,789	54,28	0,004	488,29
Germany	1,824			1,709	1.324,61
Italy	0,841		24,35	665,002	1.175,00
Spain	2,945	12,931		420,201	764,86
UK	17,745		11,56	72,721	544,08

Base: Dedicated coverage on free TV 2006/2007 in France, Germany, Italy, Spain and the UK

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4. Team Sponsorships

General Situation Motorsport Sponsorship – Example Formula 1 and WTCC



Monte Carlo 2006: 97 sponsors with on-screen time -
83 at teams, 16 at the circuit



Sao Paulo 2006: 105 sponsors with on-screen time -
98 at teams, 18 at the circuit



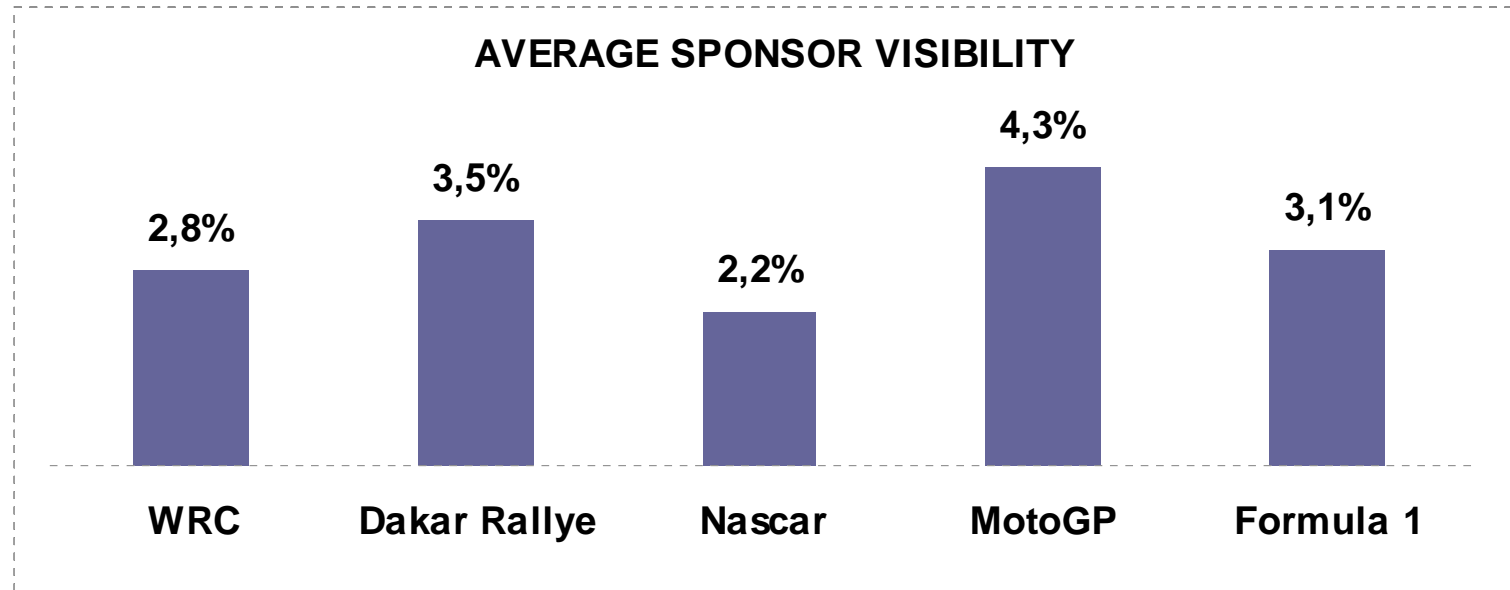
WTCC 2006:

Approx. total 40-50 sponsors
16 Event Sponsors
(Race cars and circuit)

4. Team Sponsorships



Average **on-screen share** team sponsor during race coverage:



On-screen shares may vary considerably within the same series conditional on:

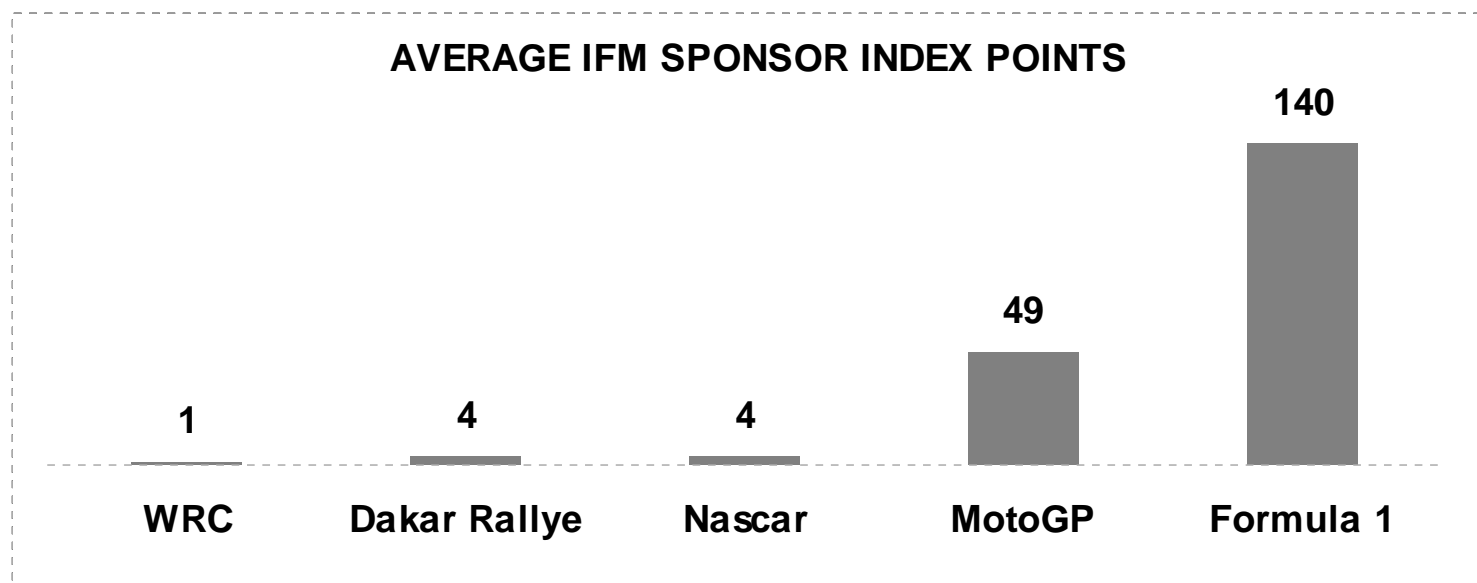
- Main camera / host broadcaster feed
- Design and prominence of sponsorship branding

Base: Dedicated coverage on free TV 2006/2007 in France, Germany, Italy, Spain and the UK

4. Team Sponsorships



Average IFM **Sponsor Index** team sponsor:



IFM Sponsor Index - calculated per programme:
Brand exposure * average programme audience / 1000

Base: Dedicated coverage on free TV 2006/2007 in France, Germany, Italy, Spain and the UK

4. Team Sponsorships

Average budgets - team sponsor p.a.



MotoGP
€8 mill.



Formula 1
€30 mill.



Nascar
€18 mill.



Dakar Rallye
€8 mill.

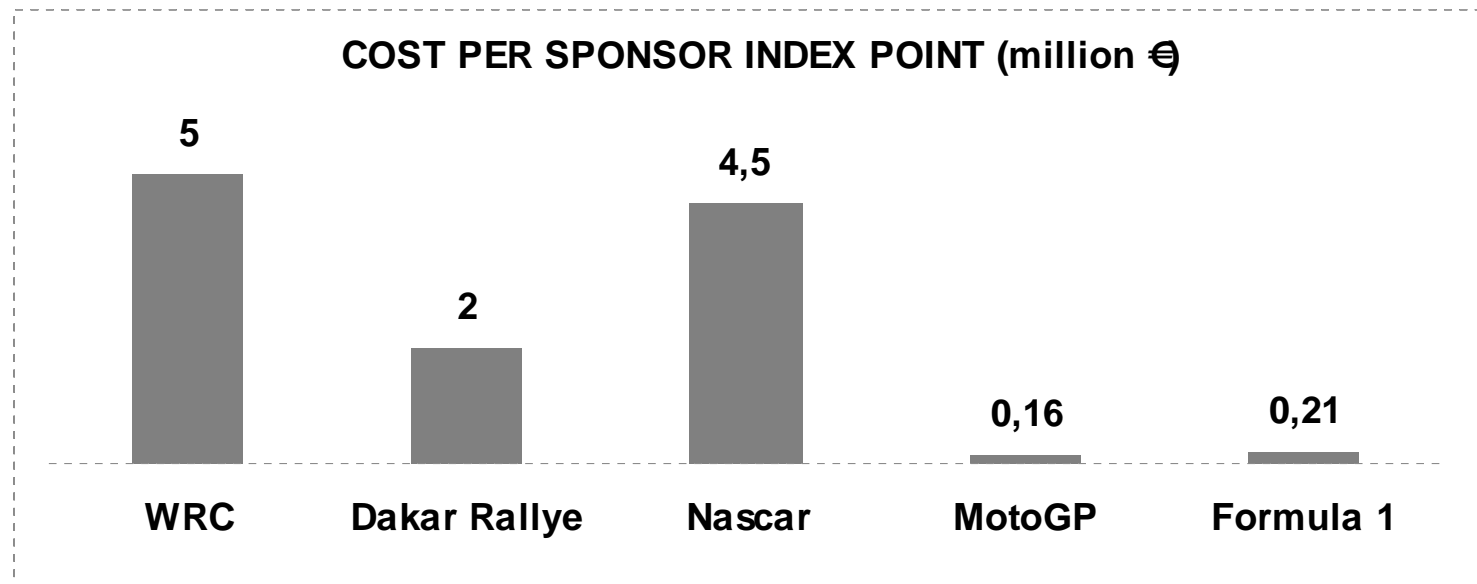


WRC
€5 mill.

4. Team Sponsorships



Average **cost** team sponsor per IFM Sponsor Index point:



Base: Dedicated coverage on free TV 2006/2007 in France, Germany, Italy, Spain and the UK

5. Conclusion

- Each Motor Sport media communication platform can be evaluated using objective criteria such as coverage duration, audiences, on-screen exposure
- Research and evaluation should be related to the requirements of the sponsors such as key markets and sponsorship communication goals
- A comparison of the efficiency of Motor Sports platforms be it on a non-financial or a financial way is key to decide on the right asset
- Television media exposure for the brand names vary a lot with the design of the logo, the prominence on-screen, the camera cuts and camera work of the host broadcaster but also on the performance of the team and the race action



THANK YOU FOR YOUR INTEREST