



EHF Competitions Conference - Media and Handball

SPORT+MARKT AG

19.04.2008

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SPORT+MARKT Company presentation

Interest levels of Handball in time and comparison to benchmarks

From EURO 2004 to EURO 2008

EHF Champions League 2005/06 to 2006/07

Consequences of international success for a national top league, an example

Conclusions

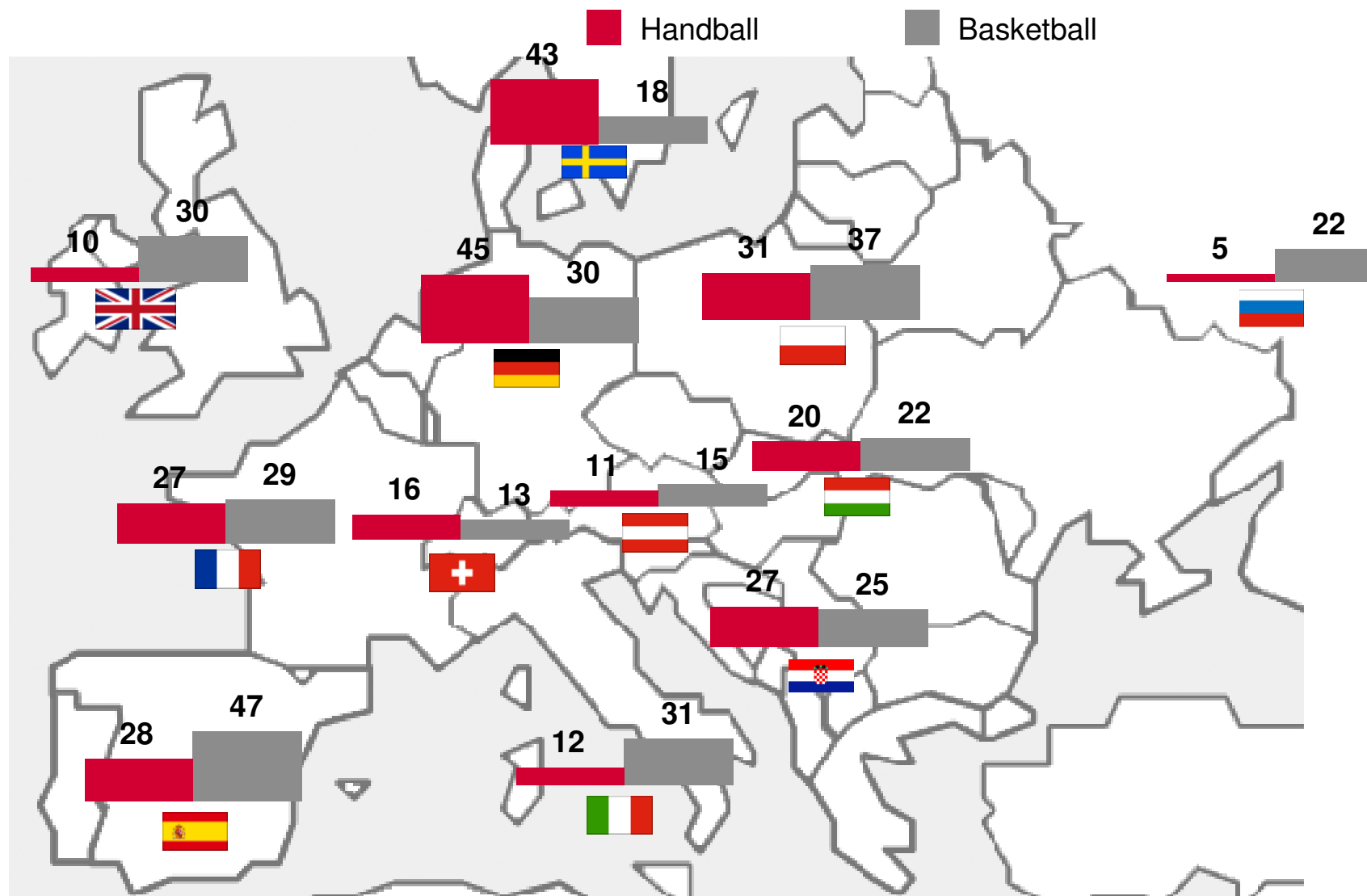
- Our goal: your success on the international sport, sponsorship and advertising markets
- Leading provider of sport marketing analysis, evaluation and consultancy
- Over 20 years' experience as a renowned partner of the top players on the market
- Client projects and references in over 120 countries worldwide
- Offices in six countries with over 500 employees
- Independent and impartial



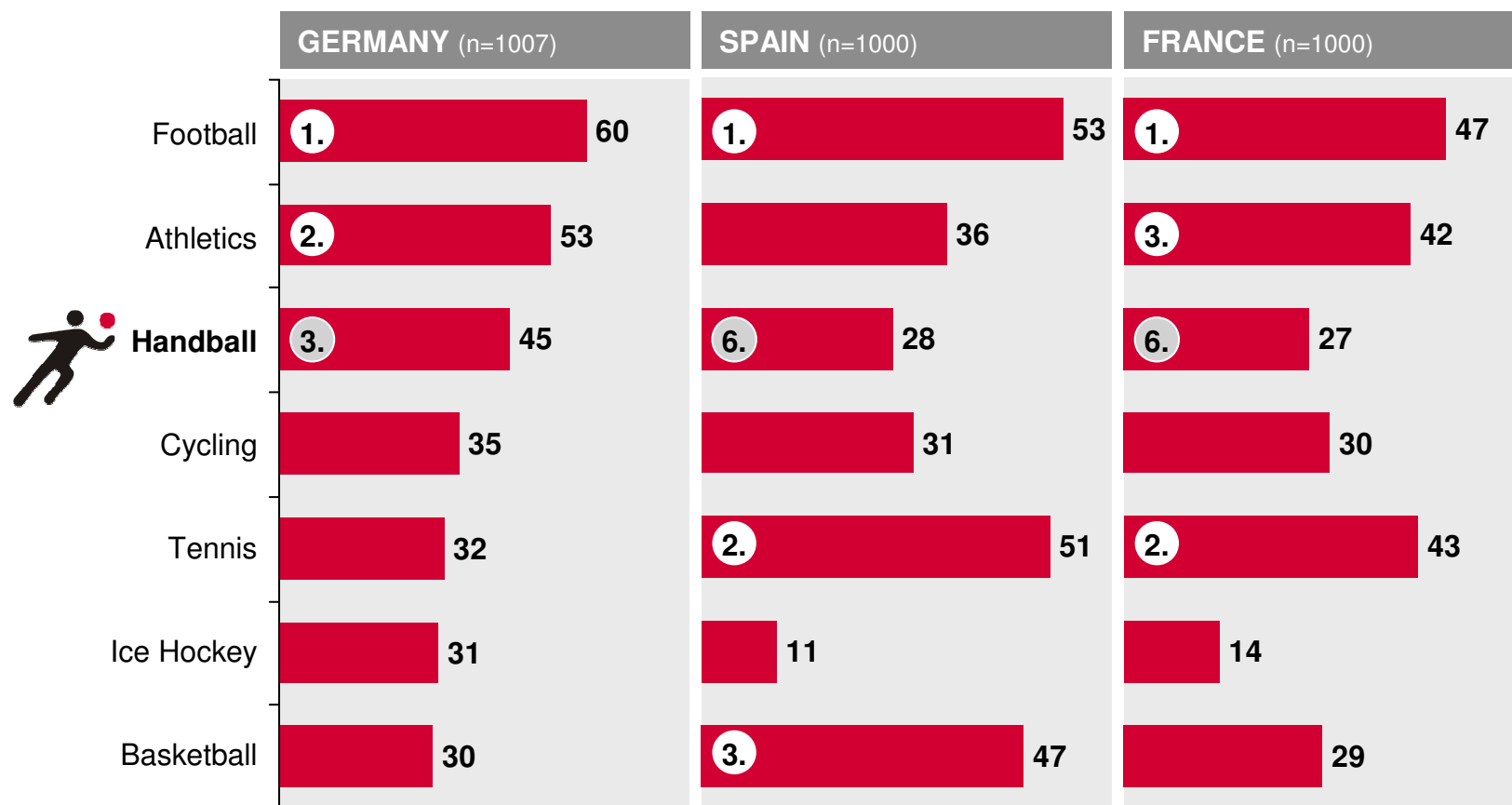
Interest levels of Handball in time and comparison to benchmarks

MR - Interest in Europe (very interested + interested)

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MR - Level of interest* in selected sports in selected countries

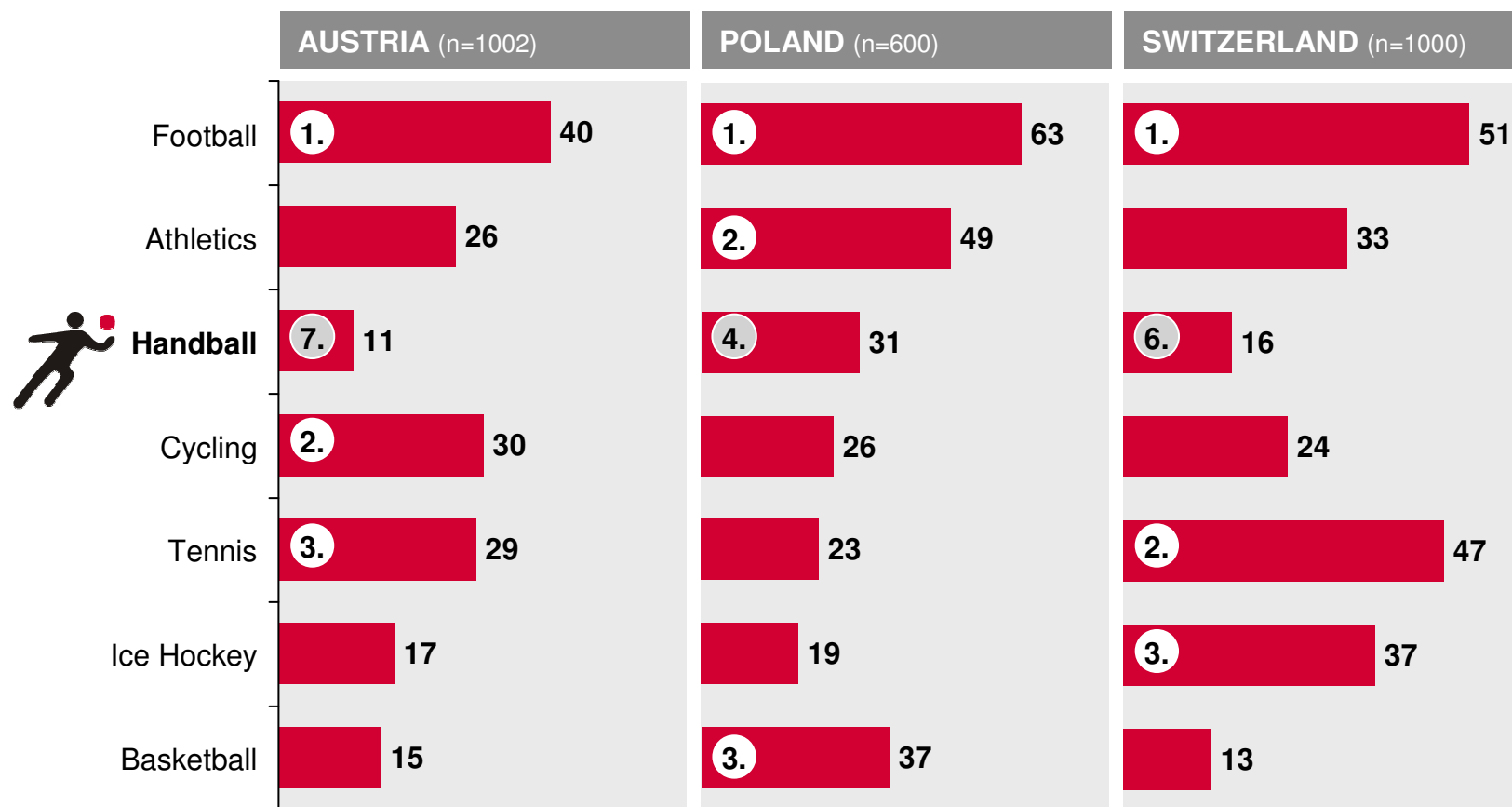


*Top-2-Box: "Very interested" + "Interested"

Source: Sponsoring 21+ 2007

Base: Representative citizens between the ages of 16-69 (Figures in %)

MR - Level of interest* in selected sports in selected countries



*Top-2-Box: "Very interested" + "Interested"

Source: Sponsoring 21+ 2007

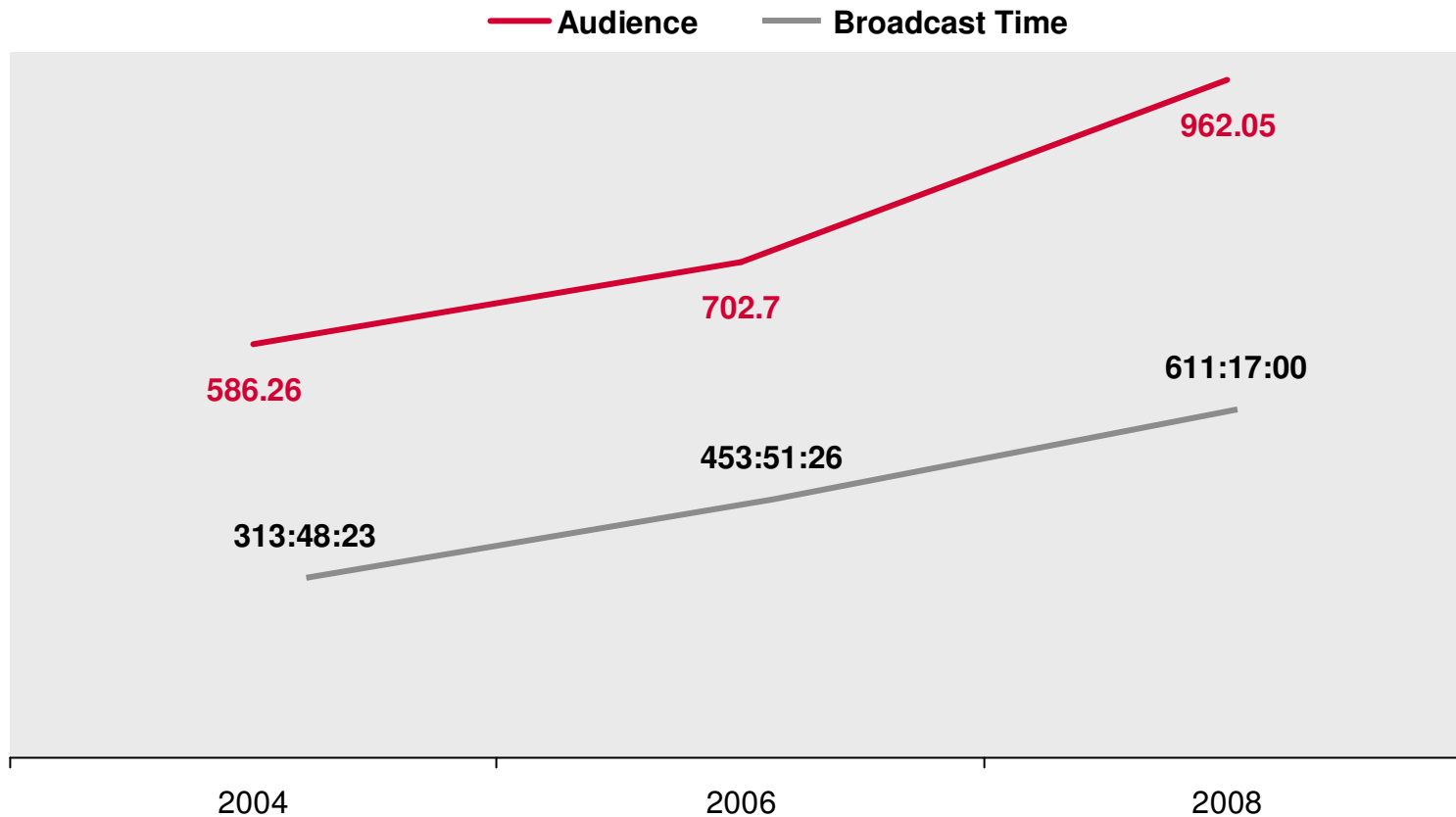
Base: Representative citizens between the ages of 16-69 (Figures in %)

From EURO 2004 to EURO 2008

Media Evaluation – EHF EURO in selected countries

Global trend

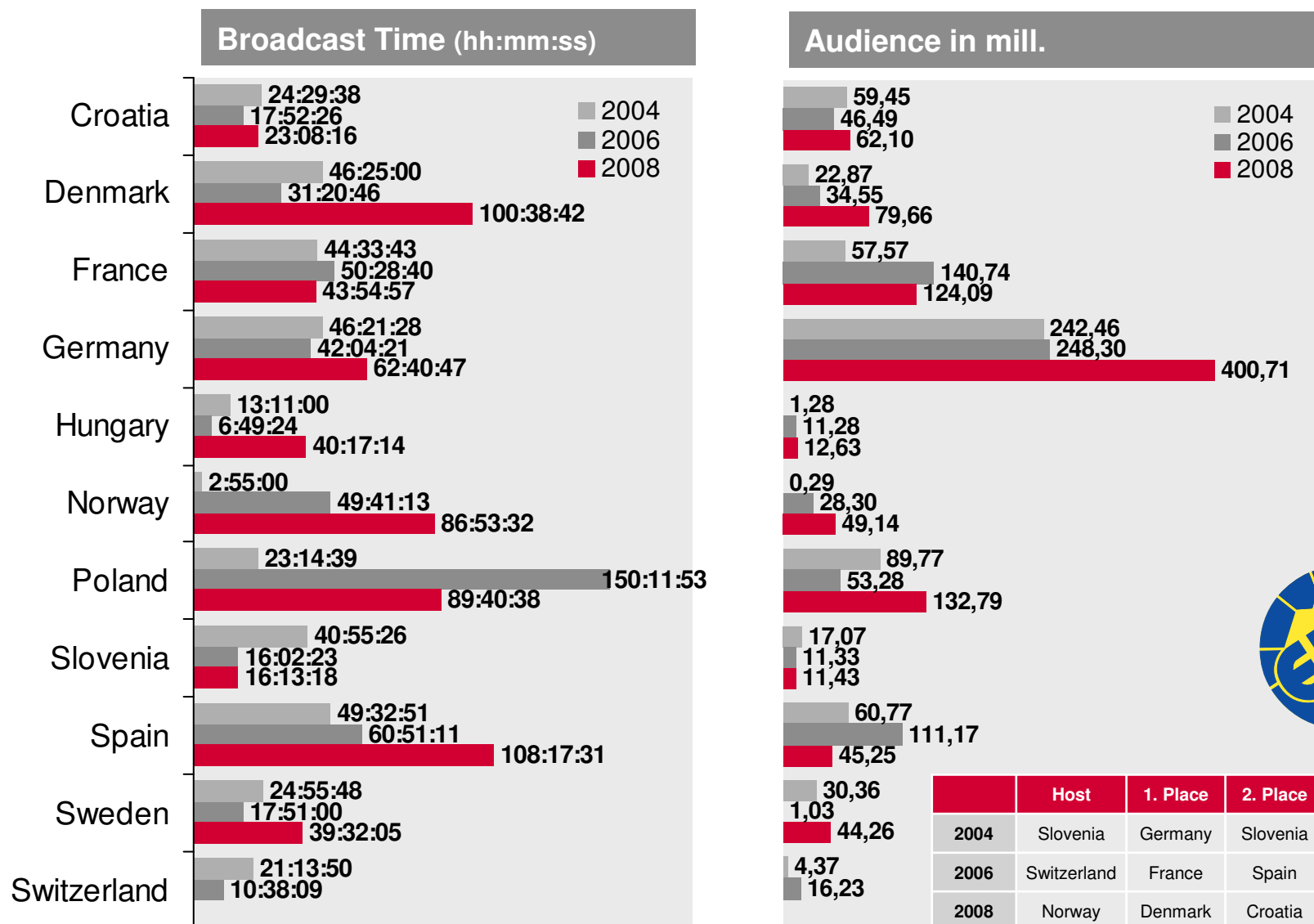
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ME - EHF EURO

Broadcast Time (hh:mm:ss) and cumulated Audience (in. mill.)

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EHF Champions League 2005/06 to 2006/07

ME - EHF Champions League

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	2004/05		2005/06		2006/07	
	Broadcast Time	Audience	Broadcast Time	Audience	Broadcast Time	Audience
Croatia	09:34:01	30.04	12:11:13	12.16	09:34:00	18.18
Denmark	24:32:03	27.26	24:34:26	22.36	22:54:19	14.65
France	61:27:31	48.69	35:48:46	32.26	43:30:36	28.02
Germany*	15:27:03	45.2	16:39:18	16.07	47:17:46	61.39
Hungary	23:24:37	27.34	33:30:06	37.01	29:59:25	10.88
Norway	02:38:47	3.51	02:49:39	0.02	03:51:09	0.06
Poland	37:31:57	21.51	13:13:41	13.77	n.n.	n.n.
Slovenia	44:30:30	32.97	40:29:35	16.43	31:53:27	6.42
Spain	127:16:37	77.59	157:38:44	46.46	107:21:03	32.75
Sweden	16:57:03	16.85	14:38:58	0	10:16:57	3.04
TOTAL	363:20:09	330.96	351:34:26	196.54	306:38:42	175.39



2005/06 Eurosport 2: BT 12:25:30

2006/07 Eurosport 2: BT 151:09:05

Source: EHF
*Including Eurosport

ME - EURO and EHF Champions League in selected countries

Broadcast Time (hh:mm:ss) and Audience in mill.

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Broadcast Time (hh:mm:ss)

Audience in mill.

2004 292:34:33

581,89

2006 443:13:17

686,47

2008 611:17:00

962,05

Season 04/05 363:20:09

330,96

Season 05/06 351:34:26

196,54

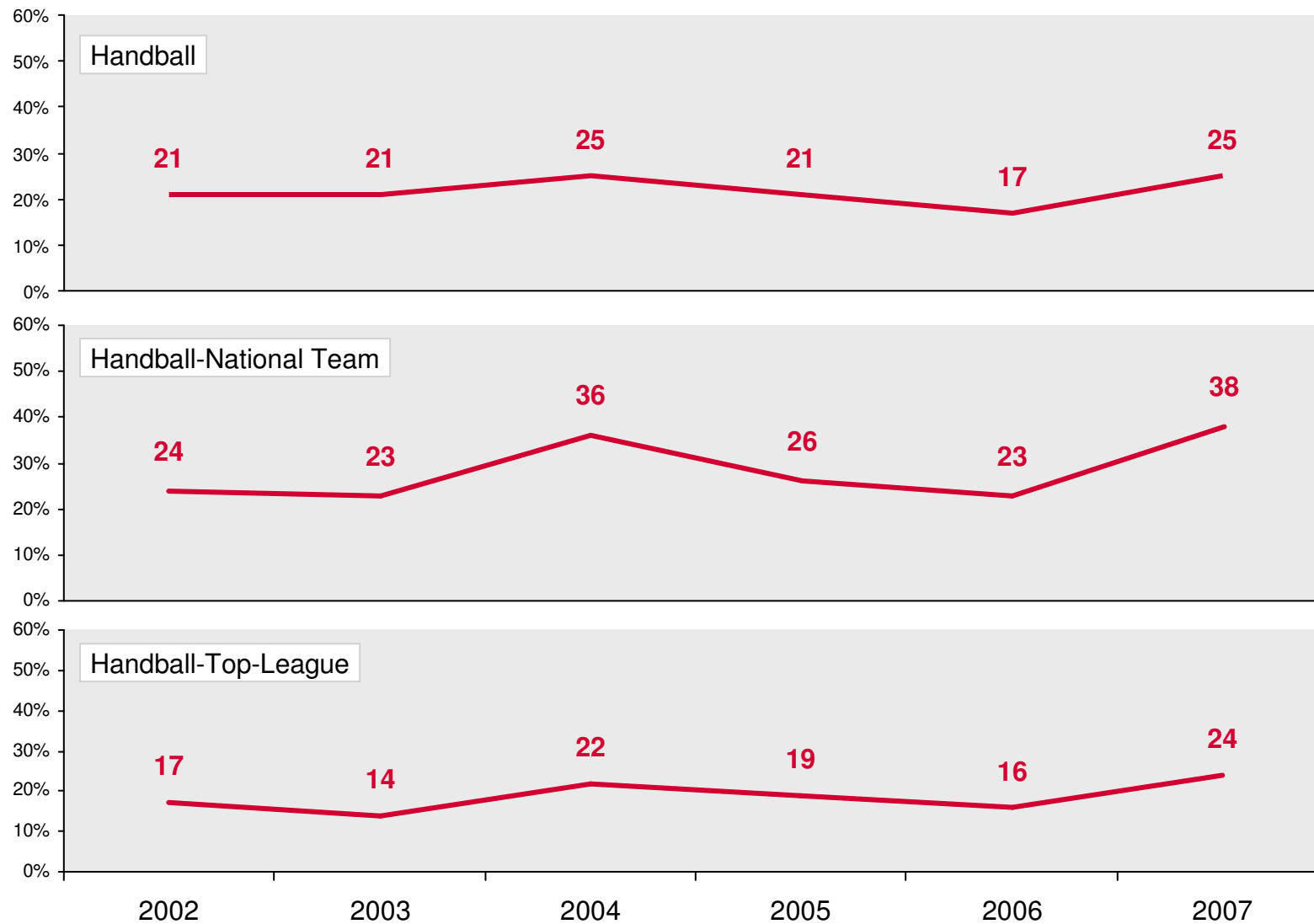
Season 06/07 306:38:42

175,39



Consequences of international success for a national top league, an example

MR - Fascination of handball after a successful World Cup competition



*Top-2-Box: "Very fascinating" + "Fascinating"

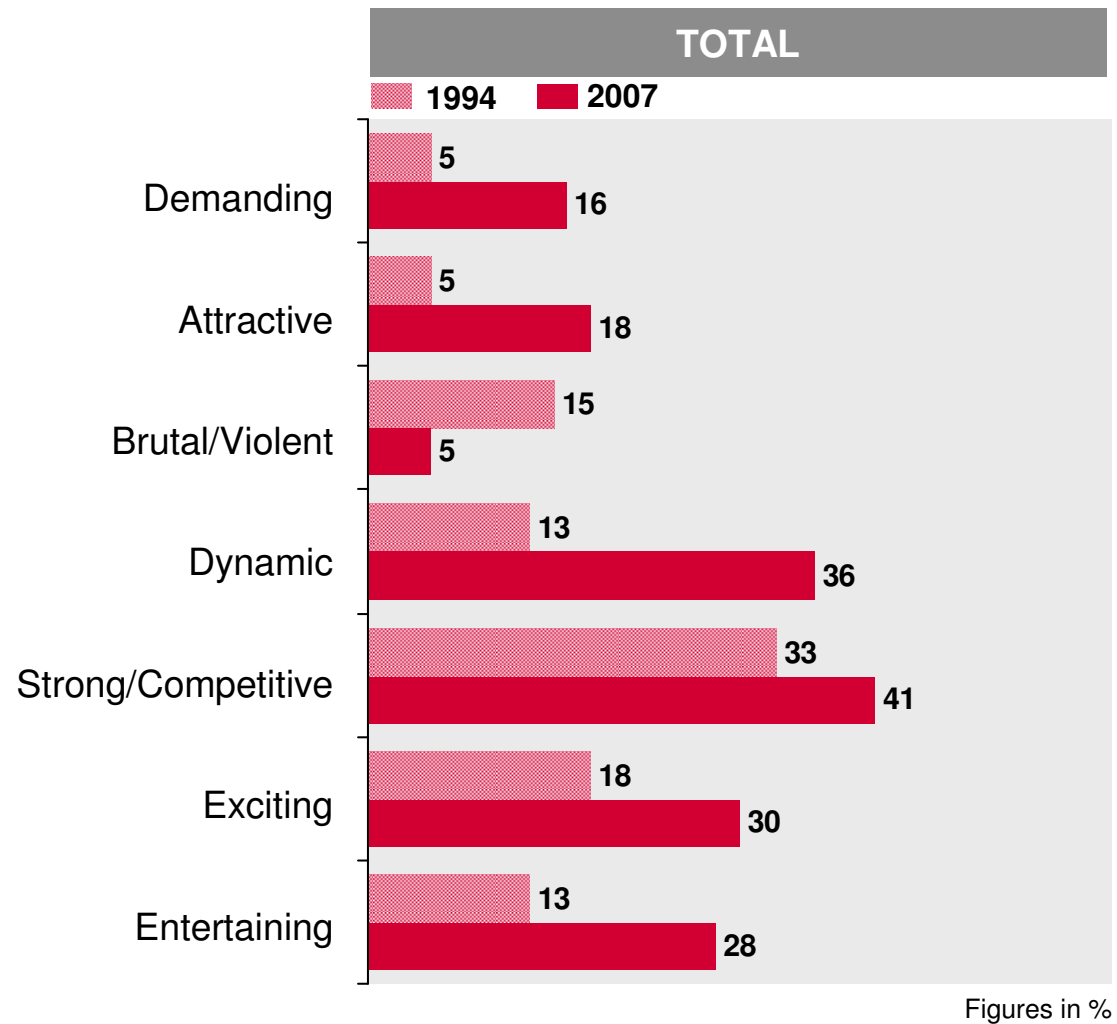
Source: Brands of Sport 2007

Base: Approx. 1000 citizens between the ages of 14-65 with an interest in sport on TV (Figures in %)

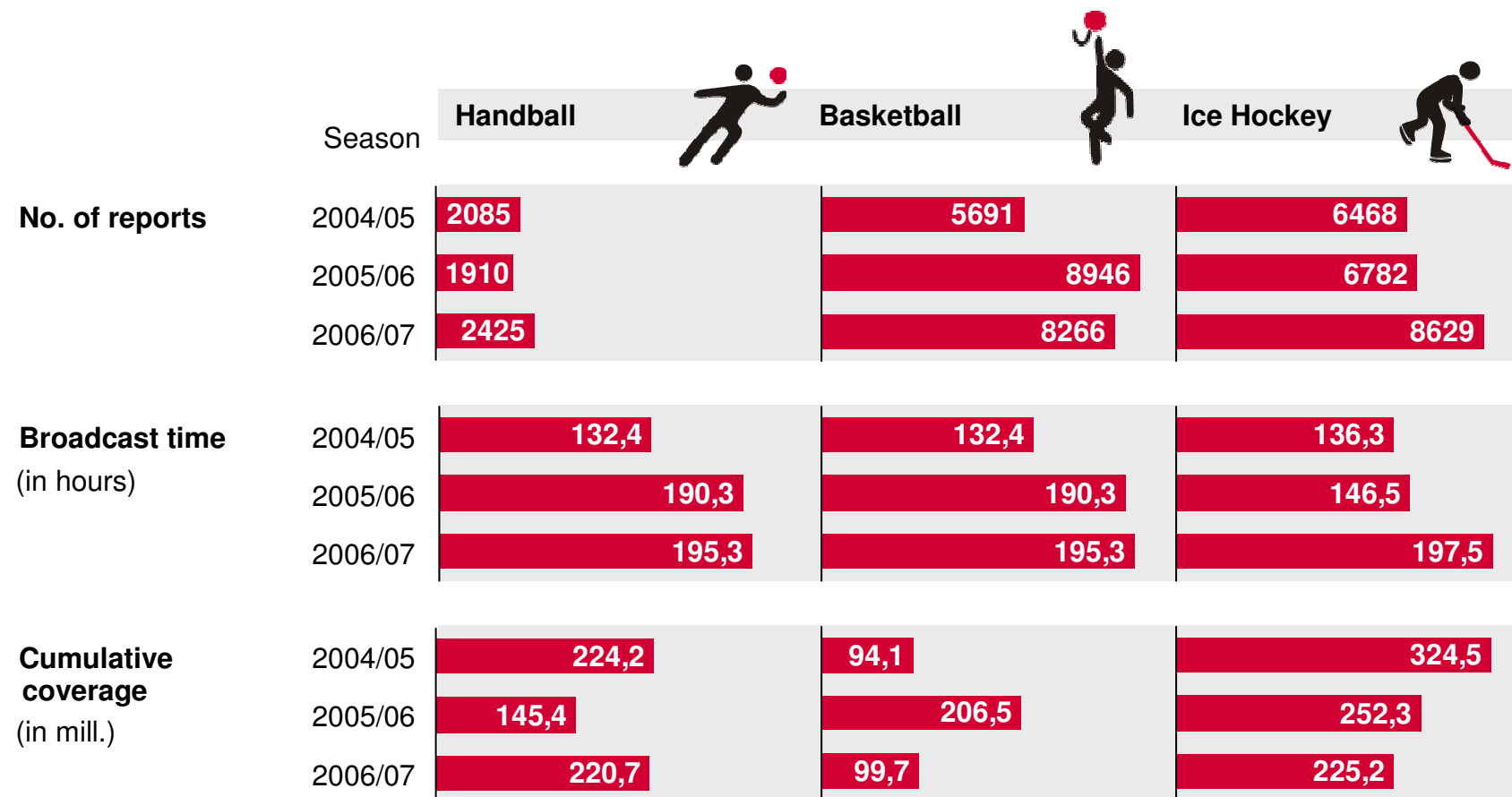
MR - The image profile of handball

Long term development

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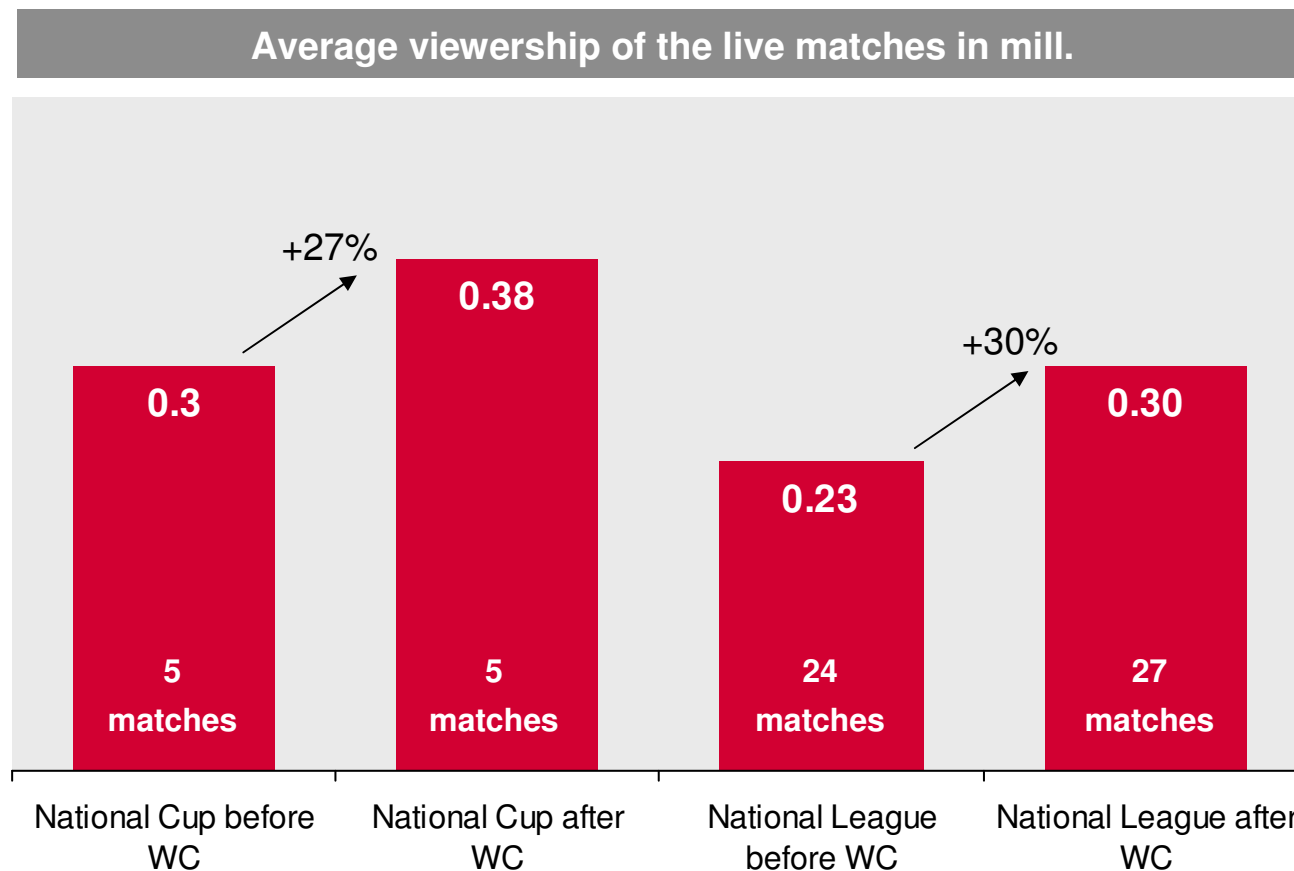
ME - A comparison of top leagues in selected sports on TV



*Number of games within the period of analysis (From match day 1 until 30. April 2007) → Basketball: 288; Ice Hockey: 401; Handball: 245

Source: Sponsors
Base: Complete coverage on Free-TV; audience share: TV viewers aged 14 and above

ME - Development of live TV audience figures after a successful World Cup competition



- In most european countries Handball in viewers' relevant set as an interesting TV sport
- Positive tendency in terms of popularity and fascination especially in markets with a strong national team
- The EURO has established itself as a top European handball event and has become popular in the course of the past years. Broadcasting countries profit from the competition as well as the countries whose teams perform well
- Regular TV-channels and regular programme formats are important for long-term success of European club competitions
- Top national leagues can benefit from the success of the national teams
 - positive tendency regarding ticketing
 - positive tendency for sponsorship deals
 - positive tendency for TV-ratings

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Thank you.