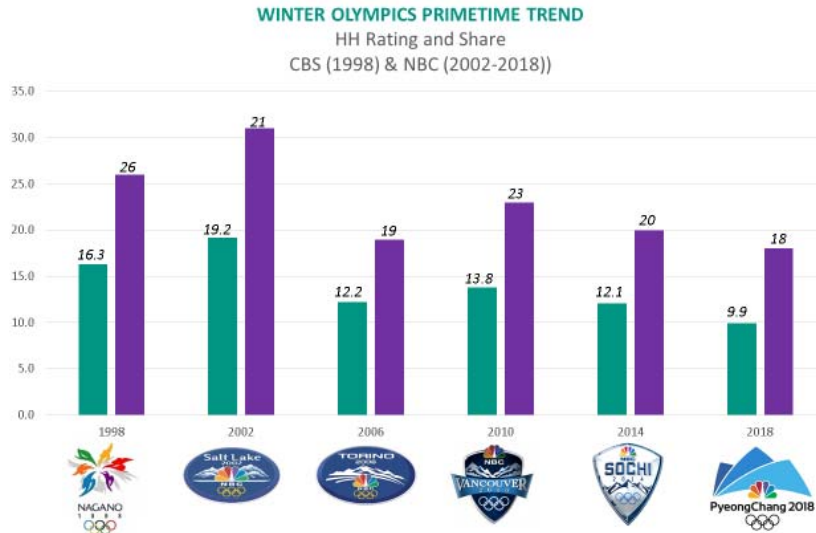


2018 WINTER OLYMPICS in PyeongChang on NBC Special Sports NTI and Social Edition 9 March 2018

From the lighting of the torch at the Opening Ceremony through the rituals of the Closing, the games from PyeongChang, South Korea averaged a 9.9/18 HH NTI in primetime, falling short of 2014 Sochi (12.1/20), 2010 Vancouver (13.8/23), 2006 Torino (12.2/19), 2002 Salt Lake City (19.2/31) and 1998 Nagano (16.3/26). PyeongChang also managed to turn in the lowest ratings since 1998 (the furthest back we tracked the Winter Olympics for this piece) in A18-34 (2.7/14), A18-49 (4.1/16) and A25-54 (5.3/17). Thanks in part to the home front advantage, it was Salt Lake City in 2002 which was the most viewed across the board of the past six Winter Olympics. If we go back even further, though with not as much data, it was 1994's Lillehammer which boasted the highest shares (30 and 40 shares and even up to 60 shares) in HH's, hitting a high 48.5/64 on one of the nights versus all Olympic games back to 1984's Sarajevo.



Source: Nielsen NMTV, LIVE+SD data, as dated.

While Lillehammer produced a true-crime drama played out over the Olympics with the Nancy Kerrigan/Tonya Harding controversy, PyeongChang only had its "scandal-lite" moments -- Shaun White's harassment allegations, Lindsey Vonn's and Adam Rippon's political issues with the current administration in Washington, the Russians doping and subsequent Olympic ban and North and South Korea putting their massive differences aside to march together in the opening ceremony. Unfortunately, these incidents did not bring the same curiosity and, in turn, audience to the games as it did back then. Viewers may have been more drawn to the actual crime that happened between the two female figure skaters versus wanting to get away from all the political issues of today that crept into the current games.

This **FLASH** includes:

- **INTRODUCTION & TAKE-AWAY HEADLINES**
- **OLYMPIC COVERAGE & MEDAL COUNT**
- **PYEONGCHANG VERSUS SOCHI – NTI Performance**
- **OLYMPIC BUZZ & SOCIAL CHATTER**

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TAKE-AWAY HEADLINES

- *The broadcast and cable networks and digital platforms of NBCUniversal "presented 2400+ hours of programming, the most in-depth coverage in Winter Olympics history" and it was live to all time zones.*
- *Though this year's Olympics did underperform, it was only marginally below the 2014 Sochi games across the board in primetime -- down -18%/-7% in HH rating and share (from a 12.1/20 to a 9.9/18), -24%/- in A18-49 (from a 5.4/16 to a 4.1/16) and -19%/- in A25-54 (from a 6.6/17 to a 5.3/17).*
- *The top competitive programming airing against the 2018 Olympics included repeats of THE BIG BANG THEORY and YOUNG SHELDON and original programming such as THE BACHELOR, BIG BROTHER and GREY'S ANATOMY. In 2014, AMERICAN IDOL came closest to delivering Olympic-sized ratings.*
- *While there were so many places and devices to watch the Olympics from, the NBC network boasted the highest rated performance on broadcast and cable television. NBC's total day average lead over CABLE's total combined rating/share performance was more than substantial, generating an advantage of +277%/+175% in HH's (4.9/11 vs 1.3/4), +171%/+100% in A18-49 (1.9/10 vs 0.7/5) and +257%/+100% in A25-54 (2.5/10 vs 0.7/5).*
- *Based on the question from Katz Media Group's OUR MEDIA panel "where did you watch the Olympic coverage", the results came back along the same lines as the ratings -- that the NBC broadcast network was viewed the most (92%), followed by NBCSN (36%), the NBC Olympic website (9%) and the NBC mobile app (3%).*
- *While online and mobile media advertising revenue continues to grow, digital and social content is a strategic imperative that creates important opportunities to engage audiences across screens and drive viewers to broadcast and cable throughout the games.*

OLYMPIC COVERAGE

According to NBC...

- *The broadcast and cable networks and digital platforms of NBCUniversal "presented 2400+ hours of programming across NBC (176 hours), NBCSN (369), CNBC (46), USA Network (40.5) and NBCOlympics.com/NBC Sports app (1,800+), the most in-depth coverage in Winter Olympics history". (Though the summer 2016 games had an unprecedented 6,755 hours of programming.)*
- *The 2,400+ hours of coverage were comparable to the past two Winter Games combined (Sochi; 1,600+) and Vancouver (835).*
- *It should be noted that on five nights NBC chose to air "sustaining programming" the first half hour of the events and on one night the first hour of events without any national commercials.*
- *We should also point out that the PyeongChang Olympics were aired live to all time zones.*

MEDAL COUNT

- *With Russia technically out of the picture, Norway (39), Germany (31), Canada (29), the United States (23) and the Netherlands (20) were the top countries to earn the most medals at the 2018 Winter Olympic games.*
- *The U.S earned the same number of gold medals (9) in 2018 as it did in 2014, brought home one more silver (8 vs 7) and earned only half the bronze (from 12 to 6).*

2018 Winter Olympics - Final Medal Count

	Gold	Silver	Bronze	Total
Norway	14	14	11	= 39
Germany	14	10	7	= 31
Canada	11	8	10	= 29
United States	9	8	6	= 23
Netherlands	8	6	6	= 20

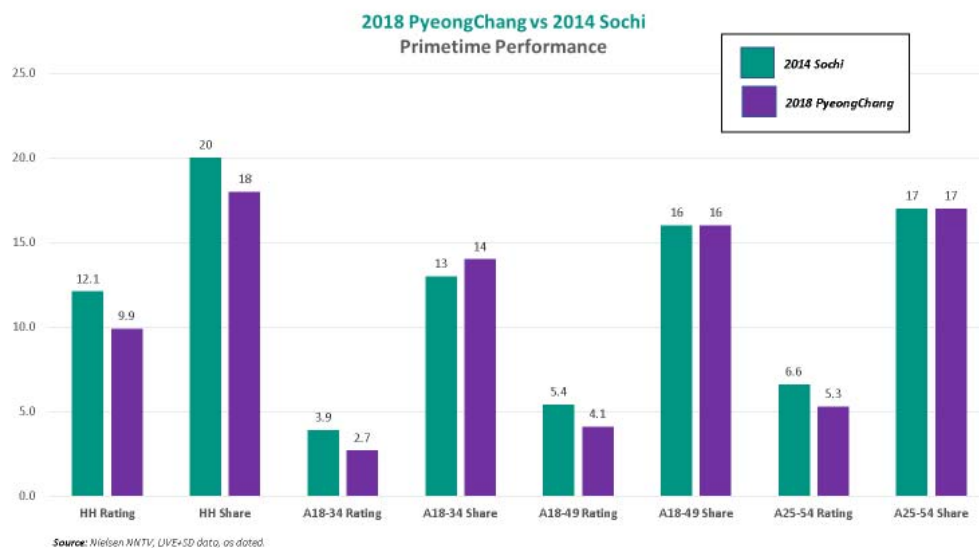
2014 Winter Olympics - Final Medal Count

	Gold	Silver	Bronze	Total
Russia	13	11	9	= 33
United States	9	7	12	= 28
Norway	11	5	10	= 26
Canada	10	10	5	= 25
Netherlands	8	7	9	= 24

PYEONGCHANG versus SOCHI – NTI PERFORMANCE

By DAYPART

- Though this year's Olympics did underperform, it was only marginally below the 2014 Sochi games across the board in primetime -- down -18%/-7% in HH rating and share (from a 12.1/20 to a 9.9/18), -24%/- in A18-49 (from a 5.4/16 to a 4.1/16) and -19%/- in A25-54 (from a 6.6/17 to a 5.3/17).
- Keeping in mind that this Olympic presentation was live to all time zones, aside from primetime, NBC was most consistent versus its 2014 daypart performance in M-F and Weekend prime plus (late night) and Mon-Sun total day where levels were flat-to-up or down a share point in HH's and key adults.
- M-F and Weekend daytime posted slightly higher losses of 2 to 3 share points from 2014 in HH's and key adults.
- HUTS and PUTS for traditional daytime (9AM-3PM) and the 3-5PM daypart where the Olympics ran were significantly down from 2014 in HH's and key adults 18-34, 18-49 and 25-54. HUTS and PUTS were also off versus the same time frame in 2017, but the margin of decline was much smaller. (See attached excel file for the daypart and HUT/PUT comparisons for further detail.)



PRIMETIME'S TOP NIGHTS

- The top 5 performing nights in primetime HH's (out of 18) belonged to Fri, 2/9 (14.7/27), Sun, 2/11 (12.4/22), Tue, 2/13 (11.8/21), Sat, 2/10 (11.6/22) and Mon, 2/12 (11.6/21) and the same held true among key adults 18-34, 18-49 and 25-54.
- The top viewing nights occurred in the first week where:
 - Katie Couric and Mike Tirico hosted the opening ceremony spectacular.
 - Mirai Nagasu became the first U.S. female competitor to land a triple axel in figure skating, leading the team to a bronze win.
 - Jamie Anderson won her second consecutive gold medal in slopestyle snowboarding.
 - Shaun White won gold in the snowboarding halfpipe after a less than stellar Sochi performance.
 - U.S. women's hockey team shut out the Olympic Athletes of Russia 5-0.
 - Chloe Kim took the gold in the snowboarding halfpipe and became the first female to land consecutive 1080s at the Olympics.
 - 17-year-old Red Gerard won the first U.S gold of the games in the slopestyle event.
- The lowest performing night (just above the OLYMPIC GALA and PYEONGCHANG GOLD) was Sat, 2/24 (6.7/13 HH) where the U.S. men's curling team swept their way to gold, defeating Sweden in the finals. While curling may not have had much of an audience on broadcast, it is a sport that is heavily followed online.

COMPETITIVE PRIMETIME PROGRAMMING

- Even with lower ratings for the PyeongChang Olympics overall, NBC was still gold in primetime. As past years, no other network program came close to NBC's delivery.
- Looking past NBC, the top shows (whether it was one episode or an average of two or three) on the primetime ranking during the Olympic time frame (2/8/18-2/25/18) came from CBS and ABC.
- CBS registered the most top ranked regular series competition of the other nets in P2+, HH's and A25-54 while ABC took the lead in A18-34 and A18-49.
- In HH's, 60 MINUTES (4.9/9), BIG BANG THEORY repeats (4.9/9), an original GREY'S ANATOMY (4.9/8), and encores of NCIS (4.6/8) and YOUNG SHELDON (4.5/8) were the winners.
- As expected, it was original programming such as GREY'S ANATOMY, THE BACHELOR, BIG BROTHER, the NBA on ABC and BIG BANG encores which scored highest among key adults.
- The premiere of NBC's A.P. BIO (1.4/6 A18-49 and 1.9/6 A25-54) leading out of the Closing Ceremony was also top ranked in the adult demos.
- 911 (R) and THE RESIDENT (R) led FOX's line-up with original episodes of DC LEGENDS OF TOMORROW and BLACK LIGHTNING topping the CW's.
- Looking back at Sochi and primetime in general in 2014, CBS took the silver in P2+ and HH's with series like BIG BANG and NCIS while AMERICAN IDOL 13 came closest to the primetime Olympic competition for FOX and overall, airing twice a week and then three times the final week of the games.
- The above-mentioned series in 2014 also all delivered double-digit shares.
- Overall, ABC, CBS and the CW remained the most stable versus the 2014 Olympic time frame with FOX posting the slightly larger declines without a show like IDOL on its roster.
- On the cable front, AMC's THE WALKING DEAD and THE TALKING DEAD, Turner's 2018 NBA ALL-STAR GAME and USA's WWE ENTERTAINMENT were the highest overall performing series versus the Olympics.

Primetime Daypart-Winter Olympics/PyeongChang
02/08/18-02/25/18

	P2+ (000s)	HH Rtg	HH Shr	P18-34 Rtg	P18-34 Shr	P18-49 Rtg	P18-49 Shr	P25-54 Rtg	P25-54 Shr
ABC	3,334	2.2	4	0.6	3	0.8	3	1.0	3
CBS	4,507	2.9	5	0.4	2	0.8	3	1.1	4
NBC	16,216	9.1	17	2.5	13	3.8	15	4.9	16
FOX	2,237	1.4	3	0.3	2	0.6	2	0.7	2
CW	922	0.6	1	0.2	1	0.2	1	0.3	1

Primetime Daypart-Winter Olympics/Sochi
02/06/14-02/23/14

	P2+ (000s)	HH Rtg	HH Shr	P18-34 Rtg	P18-34 Shr	P18-49 Rtg	P18-49 Shr	P25-54 Rtg	P25-54 Shr
ABC	3,850	2.5	4	0.8	3	1.0	3	1.3	3
CBS	6,211	4.0	6	0.7	2	1.1	3	1.7	4
NBC	20,573	11.8	19	3.8	13	5.3	15	6.4	16
FOX	4,690	2.9	5	0.9	3	1.4	4	1.8	4
CW	1,109	0.7	1	0.2	1	0.3	1	0.4	1

Source: Nielsen NMTV, Live+SD, as dated

NBC versus CABLE COVERAGE

- If we review NBC's total day performance compared to the cable networks of NBC (NBCSN, CNBC and USA), the NBC broadcast network benefitted from the most hours of coverage in the coveted primetime hours.
- While there were so many places and devices to watch the Olympics from, the NBC network boasted the highest rated performance on broadcast and cable television.
- NBC's total day average lead over CABLE's total combined rating/share performance was more than substantial, generating an advantage of +277%/+175% in HH's (4.9/11 vs 1.3/4), +171%/+100% in A18-49 (1.9/10 vs 0.7/5) and +257%/+100% in A25-54 (2.5/10 vs 0.7/5).
- Even looking at the cable nets individually, NBC posted low-teen shares across key adults versus cable's average 2 share total day performance with a 3 share in key men.

- Of the cable networks airing the Olympics, NBCSN banked the most number of hours, played across almost all dayparts and achieved the top overall cable performance in HH's and key adults.

2018 Winter Olympics in PyeongChang-Total Day Averages
NBC versus CABLE (NBCSN, CNBC & USA) Performance
(2/8/18-2/25/18)

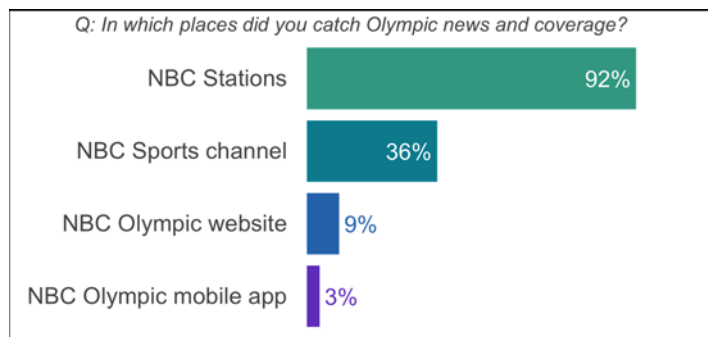
	P2+ (000s)	HH Rtg	HH Shr	A18-34 Rtg	A18-34 Shr	A18-49 Rtg	A18-49 Shr	A25-54 Rtg	A25-54 Shr
NBC	8,234	4.9	11	1.2	8	1.9	10	2.5	10
NBCSN	1,256	0.8	2	0.3	3	0.4	3	0.4	3
CNBC	604	0.4	1	0.1	1	0.2	1	0.2	1
USA	204	0.1	1	0.0	1	0.1	1	0.1	1
CABLE AVERAGE	1,096	0.7	2	0.2	2	0.3	2	0.4	2
CABLE TOTAL	2,064	1.3	4	0.4	5	0.7	5	0.7	5

Source: Nielsen NMTV, LIVE+SD, as dated.
NBCSN-Winter Oly Access Wkly, Day, Fringe Wkly and Wknd, Primetime, Late Night and Overnight dayparts.
CNBC-Winter Oly Access & Prime dayparts.
USA-Winter Oly Day and Overnight dayparts.

THE SURVEY SAYS...BROADCAST OVER CABLE FOR OLYMPIC COVERAGE

- In conjunction with the Winter Olympics' local and national ratings performance, Katz Media Group's OUR MEDIA launched a survey with its panel to see what the Olympics meant to them with a myriad of questions which included, but were not limited to:
 - Did you watch the Olympics?
 - How well did you think NBC covered the Olympics?
 - What was your favorite sport to watch?
 - Do you follow Olympic athletes on social media and if so, which ones?
 - Where did you watch the coverage?
- Based on the question "where did you watch the coverage?", the results came back from the panel along the same lines as the ratings – that the NBC broadcast network was where the Olympics was viewed the most. *Please see the chart below for the official findings.*

Viewers Tuned to Broadcast Over Cable for Olympic Coverage



Source: Our Media Survey, Feb 7-25, 2018.

OLYMPIC BUZZ and SOCIAL CHATTER

With each Olympics, NBC continues to commit more resources to digital and social media production, aiming to fully leverage its investment in the games and reach audiences across all platforms. In 2006, the network's small "web room" at the International Broadcast Center in Torino was staffed by producers that covered each sport to produce text and video exclusively for the web; at the time, the "digital pennies" generated by online advertising seemed merely a rounding error on the revenue generated by broadcast advertising. Online sponsorship opportunities were relatively limited and tied to advertisers' on-air campaigns.

Fast forward to 2018 and it's a whole new game.

- While online and mobile media advertising revenue continues to grow, digital and social content is a strategic imperative that creates important opportunities to engage audiences across screens and drive viewers to broadcast and cable throughout the games.
- NBC's social media "war room" in PyeongChang was reportedly staffed with dozens of social media producers tasked with identifying and producing content that was specifically appropriate to the different audiences and use cases on Facebook, Twitter, Instagram, Snap, and Pinterest.
- Several advertisers ran digital- and social-specific campaigns to connect with audiences beyond broadcast campaigns.

SOCIAL MEDIA STARS, BRANDING & ENGAGEMENT

While a must-have in today's media world, social media poses challenges and risks for producers and brands alike.

- With NBC heavily promoting high-recognition athletes like Shaun White (snowboarder) and Lindsey Vonn (skier), each arrived in South Korea with "baggage" that audiences addressed across social media, including ongoing harassment complaints against White and Vonn's criticisms of the current administration in DC.
- And, despite NBC's efforts to create "buzz" around Mikaela Shiffrin (skier) and Mirai Nagasu (figure skater), neither really connected with audiences across social media.
- At the same time, the first openly gay athletes to compete at the Winter Games, Gus Kentworthy and Adam Rippon, garnered new fans with their candor, openness, and good humor while their increased social media clout created new opportunities for NBC to feature both athletes on broadcast, including *TODAY SHOW* segments.
- Rippon was also offered a commentator role, which he ultimately declined.
- Snowboarder Chloe Kim emerged as the true superstar in the brave new world of sports and social media.
 - Before she earned a goal medal in her snowboarding event on Monday, 2/12, Chen had 15,000 Twitter followers. By the next morning, she had skyrocketed to more than 200,000 followers, a 1,260% jump.
 - By the time the games ended, Kim boasted close to 340,000 followers.
 - **Kim provides a potent model of how skill and personality are essential when trying to engage today's audiences.**
 - **Advertisers and marketers need to be mindful of this alchemy when identifying potential endorsement candidates and creating promotional activities.**



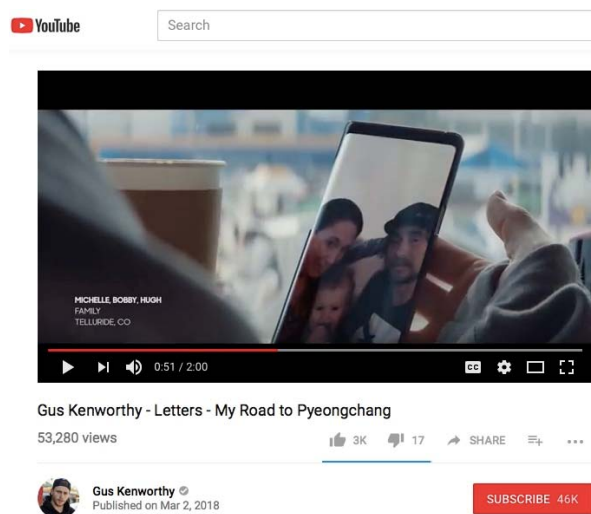
Our team tracked followers and "likes" across several platforms during the games and, while all platforms experienced increased traffic, we noted the greatest gains were on Twitter, which emerged as the "go to" for many fans, in part because of the immediacy and tone of the platform. Whereas Facebook and Instagram represent digital "bulletin boards," Twitter is the place for "conversation," which is what many fans crave — they want to be part of the experience while showing support for athletes.

BRAND SPOTLIGHT

Several sponsors developed digital strategies to extend their broadcast campaigns.

- Intel highlighted its virtual reality technologies through an "Are You Ready" campaign, inviting fans to experience the games in a new way.

- Samsung developed a series of “My Roots” and “My Letters” videos that featured athletes and the new ways they used technologies to stay connected to family and friends.
 - Samsung’s strategy was interesting because it enabled fans to find exclusive backstories about athletes, including Gus Kenworthy, who emerged as stars during the games.



- While some brands and programs attempted to capitalize on new and existing hashtag campaigns, including #SeeHer from Proctor and Gamble, Verizon, AT&T, and USAA as an effort to raise awareness of women in advertising and media, they likely did not explode in audience awareness because they lacked one or more key elements of a successful 360-campaign:
 - strong athlete personality,
 - sustained broadcast support,
 - and engaging or relevant social media content and conversation.
- #SeeHer saw modest upticks in traffic with an advertising “takeover” during primetime coverage on Tuesday, 2/13 and additional segments on *THE TODAY SHOW* the morning of Wednesday, 2/14, but we did not see additional content or sustained gains for the remainder of the meet.
- NBC also worked with Uber and Snapchat to produce new and exclusive content around the games. Unfortunately, the timing of Snap’s re-design launch and user defections presented a challenge for that partnership and, despite repeated attempts to experience Uber’s in-ride content through the app, we were unable to get a sense of the value developed on that front.

Digital and social media campaigns during the Olympics present a variety of challenges for marketers and advertisers, including restrictions on athlete participation from the IOC and media rights managed by broadcast partners and the IOC. While we’ve come a long way since the NBC’s early production of online content for the Torino games, there remains tremendous untapped and unexplored potential for what we can deliver for brands and our partners in Beijing come 2022.

KTG Content Strategy / Katz Television Group
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