



# FIS Snowboard World Cup 2022/23

TV Media Evaluation – Event Summary



Expertise by Nielsen Sports  
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# Introduction

## Study scope

<b>Object of investigation/event:</b>	FIS Snowboard World Cup (M/W)
<b>Monitoring period:</b>	2022-23 Season
<b>Sponsors:</b>	Swatch (only Park & Pipe World Cup)
<b>Markets*:</b>	Austria, Canada, China, Finland, France, Germany, Italy, Japan, Netherlands, Norway, Slovenia, South Korea, Spain, Sweden, Switzerland, United Kingdom, USA
<b>TV program types:</b>	Live, Delayed, Relive, Highlights, Sport Magazines, Magazines, News
<b>Sources of audience data:</b>	Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup   Adults 3+   Estimations by Nielsen Sports

\*Note: Russia had to be excluded from the analysis. Due to US sanctions against Russia Nielsen has withdrawn from the market.

# Presentation of results

# Global Overview

## FIS Snowboard World Cup 2022/23 – Men & Women

	Live	Non-Live	TOTAL	TOTAL 2021/22	
FIS Snowboard World Cup	<b>Cumulative Audience*</b> (M)	10.95	231.96	242.91	640.65
	<b>Number of Broadcasts</b> (#)	588	1,610	2,198	4,013
	<b>Broadcast Time</b> (hh:mm:ss)	585:26:33	779:42:20	1365:08:53	1930:03:20
	<b>Actual Playing Time</b> (hh:mm:ss)	440:19:29	556:00:29	996:19:58	1468:22:05
	<b>Event Impressions</b> (M)	973.07	2,232.05	3,205.12	6,393.82
Sponsorship Evaluation	<b>Visibility</b> (hh:mm:ss)	21:08:35	43:20:27	64:29:03	-
	<b>Sponsorship Impressions</b> (M)	18.76	74.97	93.73	-
	<b>100% Media Equivalency</b> (€)	440,397	1,245,986	1,686,382	-
	<b>QI Media Value</b> (€)	89,870	256,316	346,186	-
	<b>Average Sequence Duration</b> (sec.)	4.8	4.8	4.8	-
	<b>Ratio Visibility/Broadcast Time</b> (%)	3.6	5.6	4.7	-

\*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+ /Estimations by Nielsen Sports

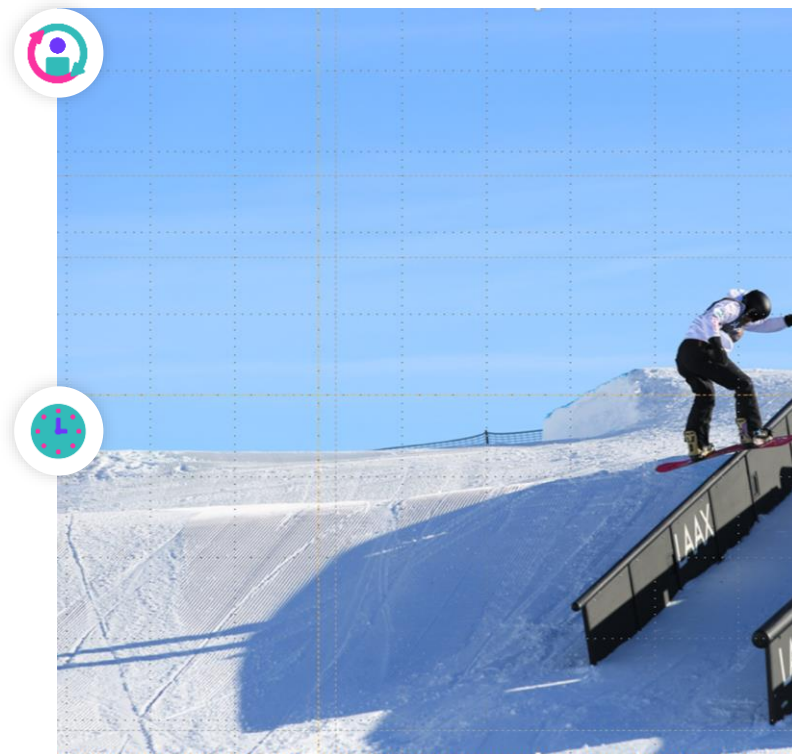
# Key Insights

## Cumulative Audience

- Audience decreased by 62% in comparison to 2021/22.
- Overall, there was a decline in all analyzed markets. Especially in Asia the audience declined significantly. The loss of audience in China (-82%), Japan (-83%) and South Korea (-95%) leads to a decrease of 320M.
- When excluding China, the decline in audience is less strong with a drop of 26%.
- With 114M, Germany ranks on the first place in terms of cumulative audience – followed by China (42M) and Austria (19M).
- News coverage was again responsible for most of the cumulative audience with 111M (45% of the total cumulative audience).
- While the overall audience decreased, the live audience doubled compared to the last season.

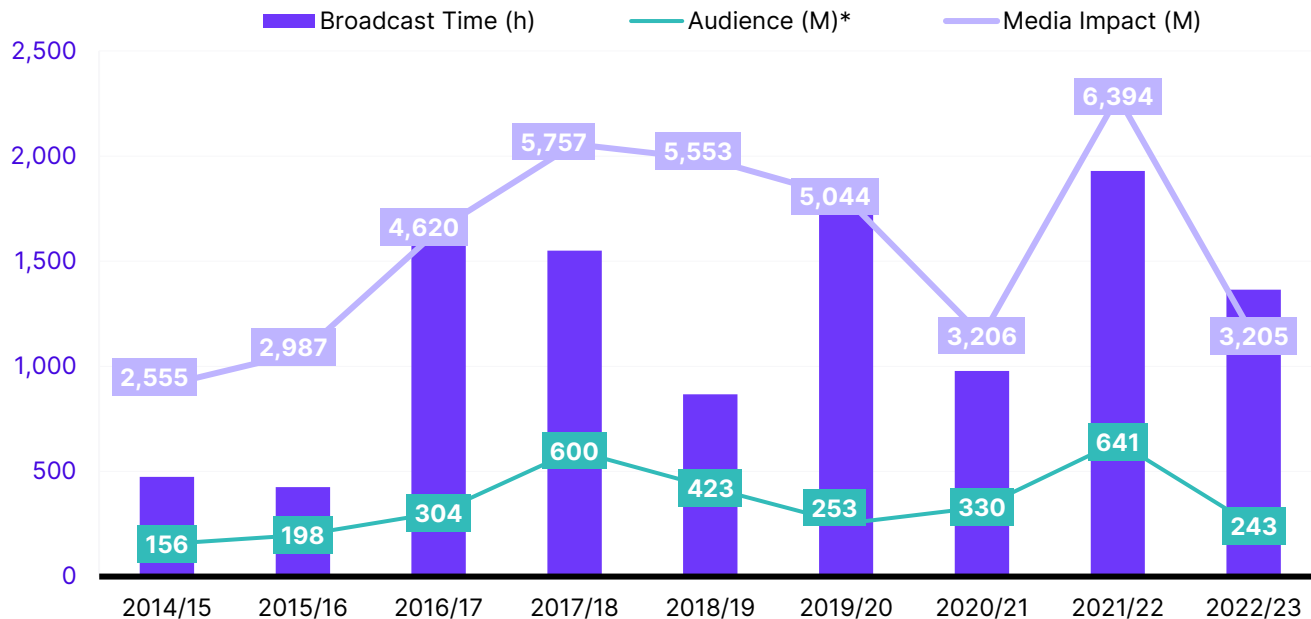
## Broadcast Time

- Total broadcast time decreased by 29% in comparison to 2021/22.
- With a focus on the markets, the development of broadcast time is various. While there was a big loss in South Korea (-99%), USA (-97%) and China (-79%), there was an increase in the Scandinavian countries - Norway (+83%), Sweden (+38%), Finland (31%).
- Most content was aired on the Eurosport channels and Viaplay (www). Together the channels are responsible for 42% of the total coverage.
- The Halfpipe competition in Copper Mountain enjoyed the broadest coverage with 117h, followed by the Big Air in Copper Mountain (100h).



# Key Insights

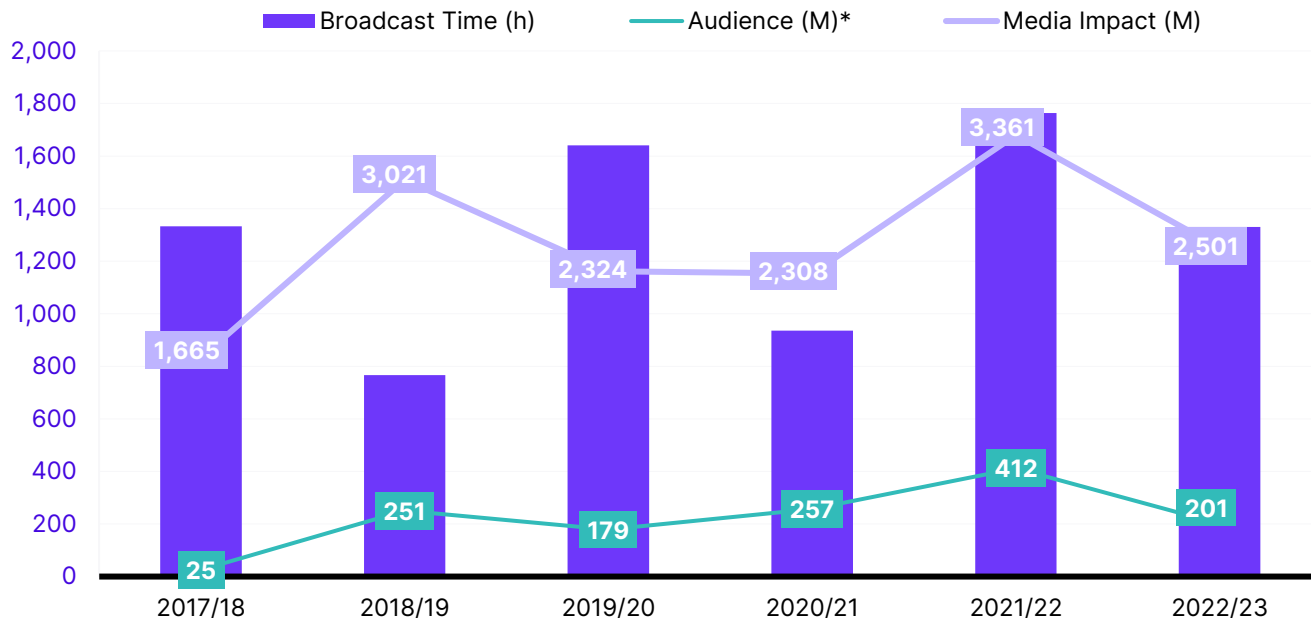
## Year-on-year development



- After the strong peak in 2021/22, values dropped again and the media impact ended up on a similar level as in 2020/21.
- Especially the values in China were particularly high in 2021/22 due to the euphoria surrounding the Olympic Winter Games 2022 in Beijing. Therefore, a decline was likely to occur in 2022/23.
- With a total amount of 1.1 billion, Germany ranks on the first place in terms of media impact. Main drivers in Germany were the live and delayed broadcasts on the free-to-air channels ARD and ZDF.

# Key Insights

Year-on-year development (excluding China)

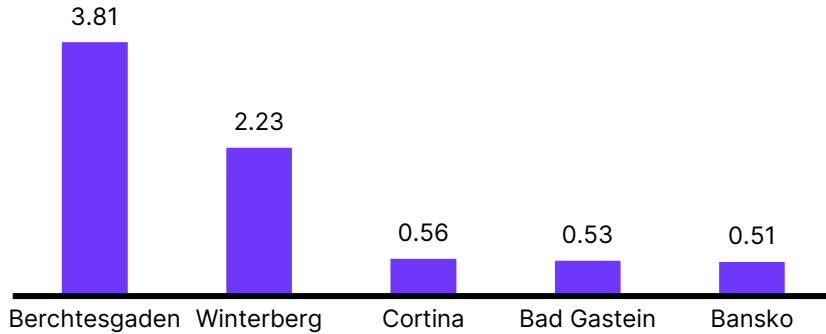


- When excluding China from the trend analysis, the values drop less strong in comparison to 2021/22.
- The main reasons for the drop are the exclusion of Russia and the decreasing impact of the Olympic Winter Games 2022 on the other Asian markets such as Japan and South Korea.
- Compared to 2019/20 and 2020/21 – years that have been highly impacted by the COVID-19 pandemic – the media impact in 2022/23 is on a higher level.
- Without China, the German market is responsible for 44% of the total media impact, followed by Italy (14%) and Austria (9%).

# Management Summary

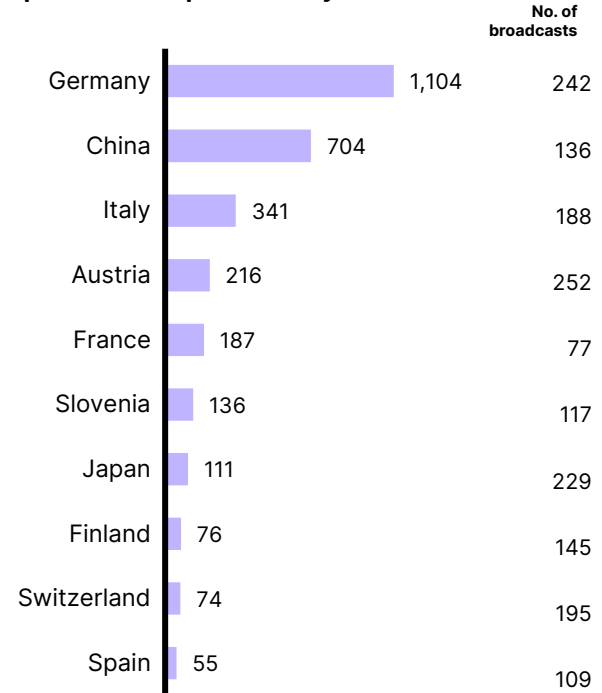
## Media Monitoring

### Top 5 Venues by Cumulative Live Audience (M)



- Like in 2021/22, Berchtesgaden achieved the highest cumulative audience through live coverage out of all venues again. The broadcasts on the German free-to-air channel ARD were responsible for 98% of the total live audience in Berchtesgaden.
- The Parallel Slalom, Parallel Slalom Team and Parallel Slalom GS are the most important disciplines in terms of cumulative live audiences. Together they made up 80% of the total cumulative live audience.
- Beside the background coverage, that can not be assigned to a specific event, the Halfpipe events account for most of the media impact in secondary coverage (21%), followed by Parallel GS (17%) and Snowboard Cross (13%).

### Top-10 Event Impressions by Market (M)

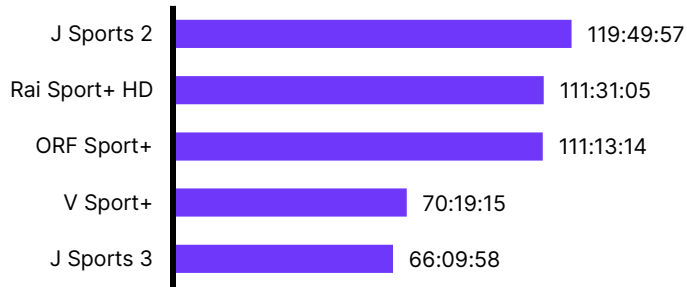




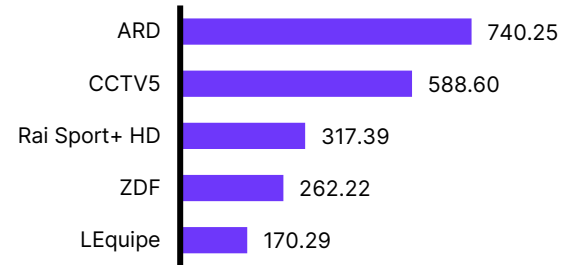
# Management Summary

## Media Monitoring

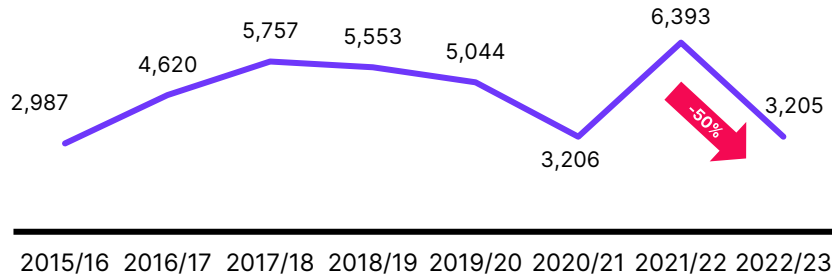
### Top 5 Channels by Broadcast Time (hh:mm:ss)



### Top 5 Channels by Event Impressions (M)



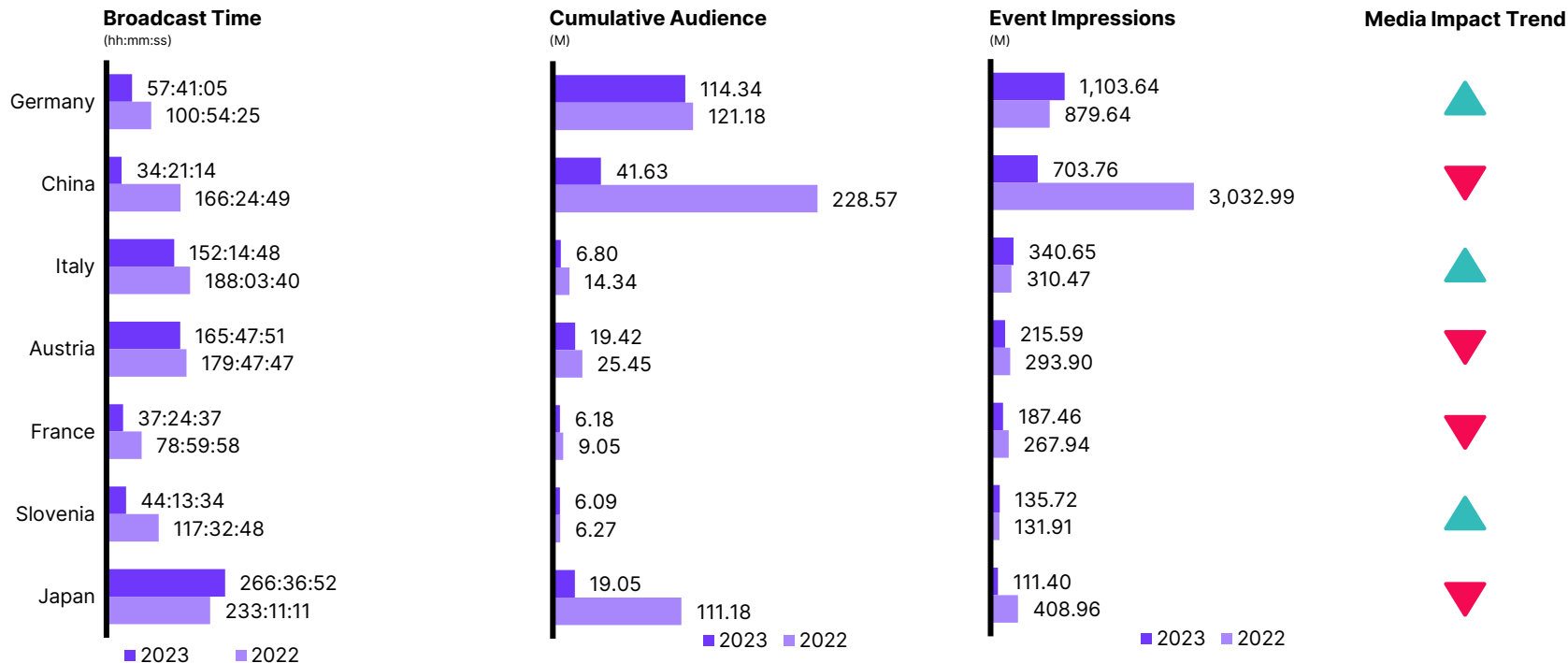
### World Cup Event Impressions Trend (M)



- In contrast to 2021/22, J Sports 2, Rai Sport+ HD and ORF Sport+ lead the ranking of the top channels by broadcast time. Nevertheless, if Eurosport is not split by country, the network is responsible for most coverage (387 hours).
- 2 out of the top 5 channels concerning the media impact are free-to-air channels from Germany.
- CCTV5 is again one of the most important channels but decreased significantly compared to 2021/22 (-67%).
- Media impact on ARD nearly doubles in comparison to season 2021/22 (+95%).

# Media Monitoring

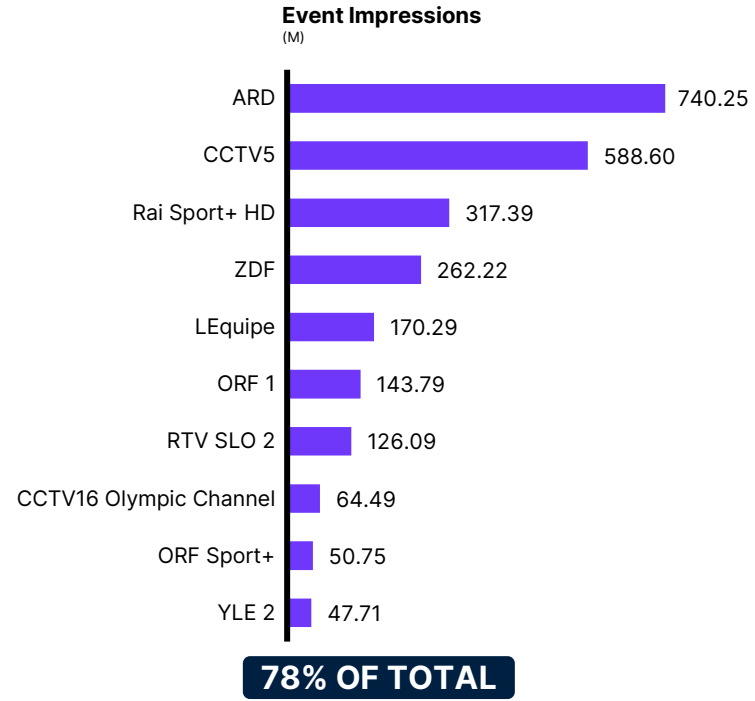
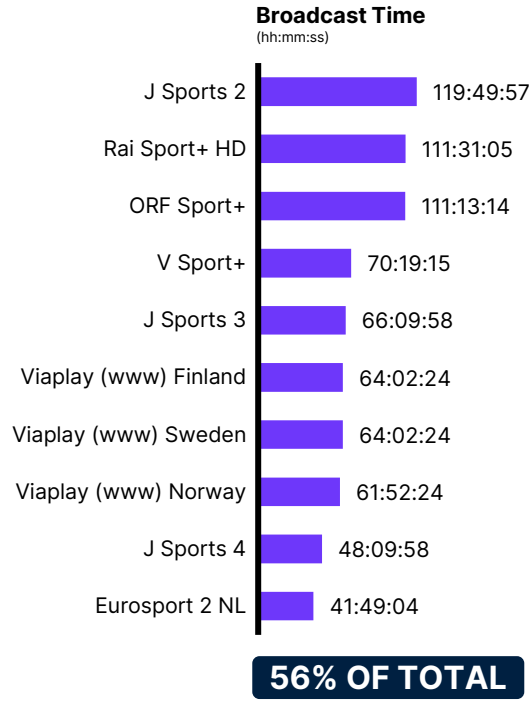
## Top 7 trending countries by Event Impressions



\*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+ /Estimations by Nielsen Sports

# Media Monitoring

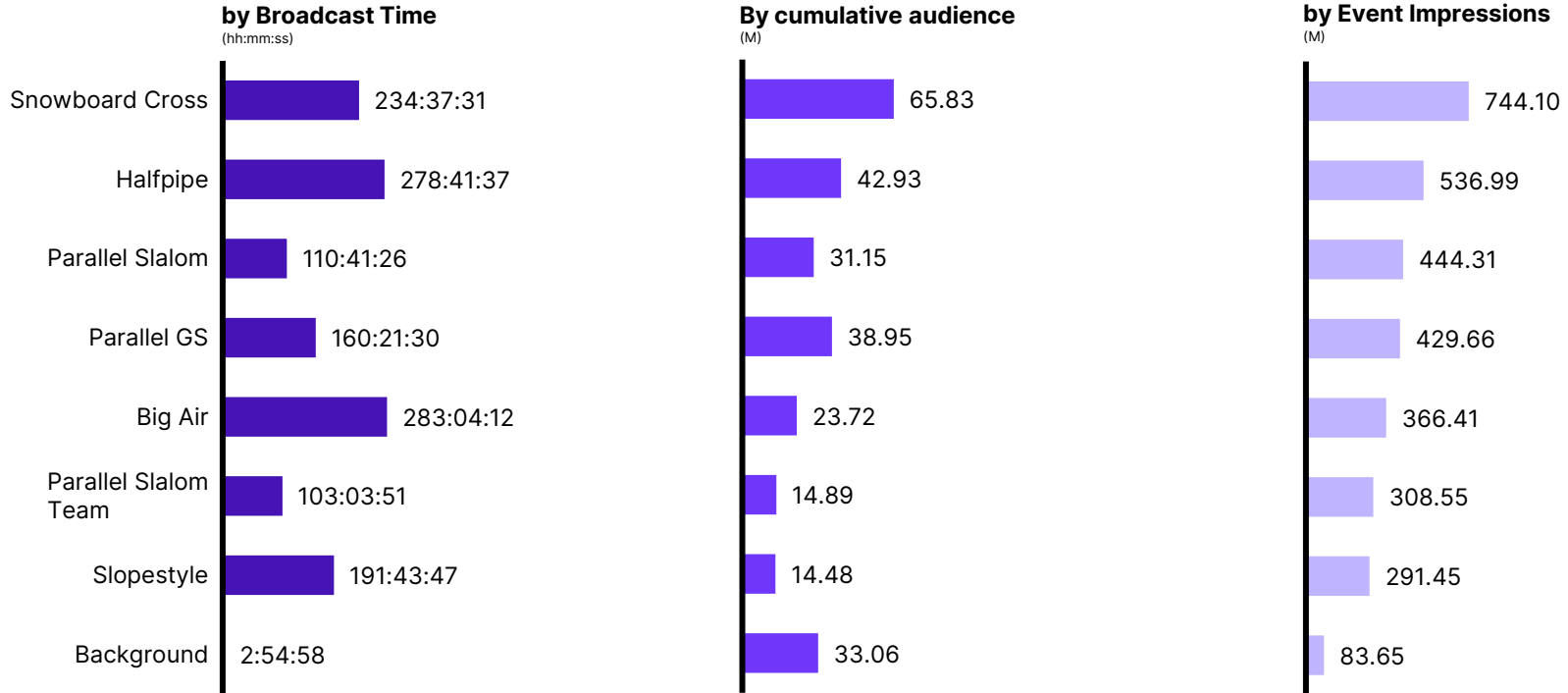
## Top 10 channels



\*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+ /Estimations by Nielsen Sports

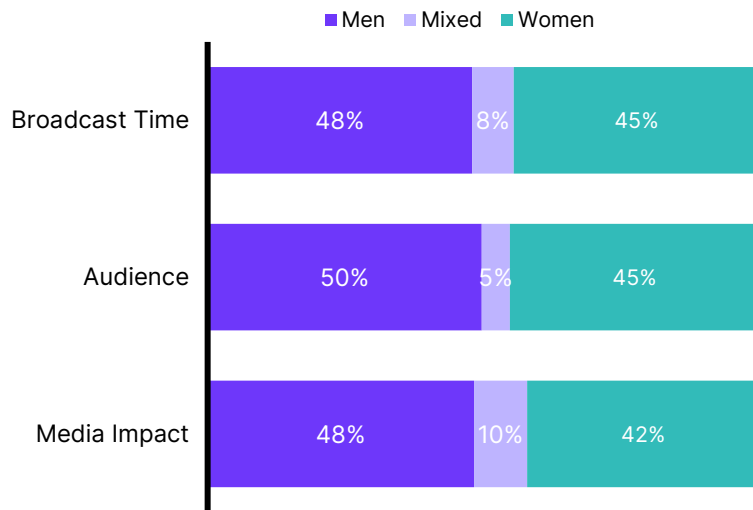
# Media Monitoring

## Event ranking by Event Impressions



# Media Monitoring

Gender comparison



**TOTAL**

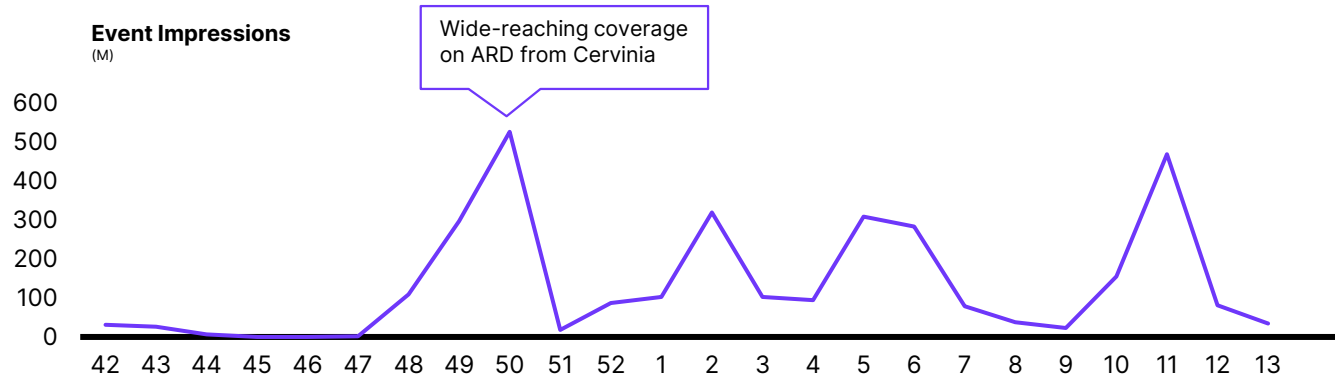
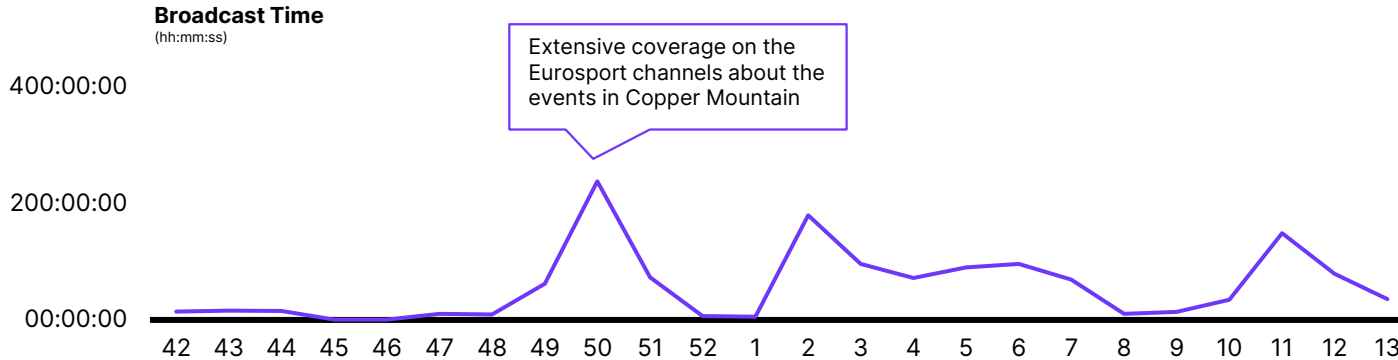
**1,365**  
hours

**243M**  
viewers

**3,205M**  
impressions

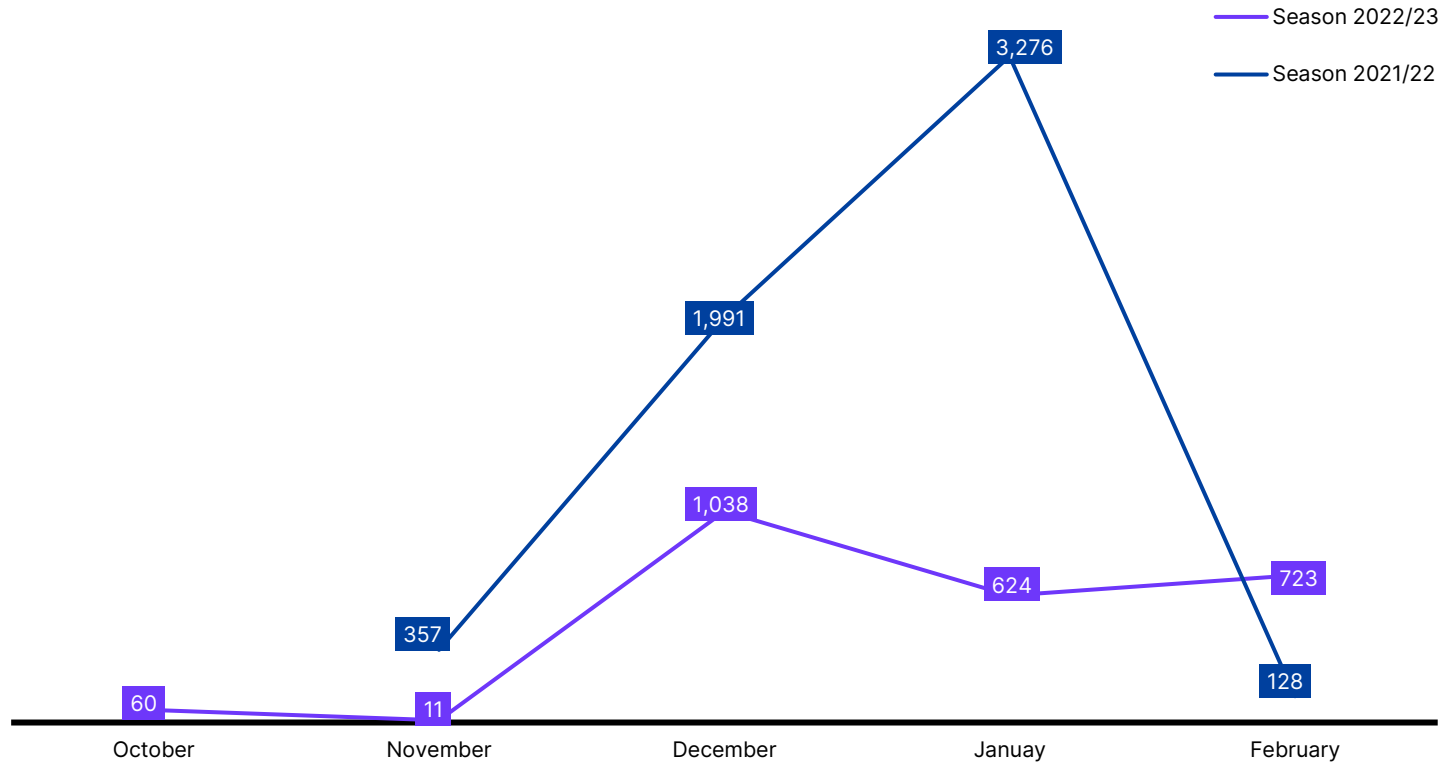
# Media Monitoring

## Weekly coverage trend



# Media Monitoring

Season comparison by Event Impressions



# Methodology



# TV Media Evaluation

## Media Monitoring

### Media Monitoring

Media monitoring refers to analyzing all relevant broadcast contents. This involves tracking of various program types covering a specific event, team, match day, or a particular World Cup venue, etc., and requires an actual recording of all those TV broadcasts.

### Broadcast Schedule Audit (BSA)

A TV channel's schedule is taken from online sources or compiled from broadcast data (audience ratings). Please note: This method of data collection only allows to map a specific event coverage, but no secondary coverage (news, etc.).

<b>Specific coverage</b> (primary broadcasting)	
<b>Live</b>	Live broadcasts
<b>Delayed</b>	First time-delayed broadcasts
<b>Re-live</b>	Re-broadcasting of a live or delayed content
<b>Highlights</b>	Sports broadcasts, which mainly show match synopses but also background information or interviews.
<b>Secondary coverage</b> (secondary broadcasting)	
<b>Magazine / Sportmagazine</b>	Programs that rarely feature sports content or general sports mix programs
<b>News</b>	Contributions in news broadcasts

### Zeitangaben

#### Broadcast Time (BT)

Broadcast time indicates the total amount of time during which the relevant event or club has been exposed.

#### Actual Playing Time (APT)

Actual Playing Time is a subset of Broadcast Time. It only includes those parts of broadcast showing competition scenes.

### Audience Evaluation

#### Broadcast Audience

Broadcast audience (also known as viewing figures or TV ratings) indicates how many viewers averagely watched a program during a certain period of time. In other words, the calculated figure shows how many viewers were reached during a specific time interval.

#### Cumulative Audience

Cumulative audience is calculated by adding up reaches of individual programs. Cumulative audience is always a gross reach, so a TV viewer who watched the news and then a live football match would be counted twice.

#### Market Share

The term market share stands for the percentage of a broadcast's average viewing audience among all TV viewers of all program types at a given time.

#### Audience Data Sources

Nielsen Sports has contracts with official rights holders about distribution of ratings. In Germany, it's the AGF/GfK agency. Internationally, we obtain data from the Eurodata TV/Médiamétrie agency, to name but one.

#### Estimated Audience

If some channels are not involved in any official audience measurement, Nielsen Sports applies its own estimation method. The following information is included in calculating an estimated audience: technical reach or number of viewers for a program's weekday and time of the day, program's content, level of interest in a sport discipline in the country of broadcast. Please note: The result is an approximation of TV viewing figures.

### Media Impact

#### Event Impressions

Event impressions are an essential metric in media tracking, since they allow to make conclusions about a sponsorship platform's media impact - be it an event, a sport, or a league, etc. When calculating impressions, it is important to remember that the length of a contribution in a program must be always

$$\frac{\text{Broadcast Time in secs} \times \text{Audience in M}}{30 \text{ secs}}$$



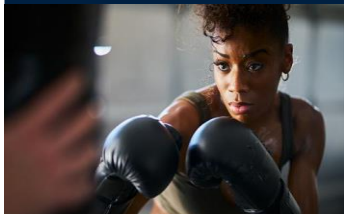
**Nielsen Sports** is the global leader in sports media valuation, data intelligence and research consulting.

We provide brands and rights holders the knowledge to identify and connect with the audiences that matter most to them.



# The depth of Nielsen Sports

## Trusted Data



Nielsen Sports is the reliable, independent source of truth that helps our clients make decisions with confidence.

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The global standard to quantify value and benchmark media performance in sports across multiple platforms & screens.

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The largest worldwide media monitoring network with unmatched accuracy & transparency.

## Comprehensive



Unparalleled access to Nielsen Ratings and the coveted suite of Nielsen media solutions.

## Innovative



Nielsen applies a unique combination of advanced machine analysis and people-powered research to provide clients a clear picture of the sports media landscape.

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leagues & events**

monitored by cutting-edge image detection & machine learning technologies



**7+ million  
hours**

of video content across TV, social & digital platforms captured annually by a global infrastructure



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brands**

with rich exposure data collected across the largest syndicated data platform in sports



**50+ Global  
markets**

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**Billions of  
data points**

created through algorithmic valuation and frame by frame video analysis

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