



Audi FIS Ski World Cup 2022/23

TV Media Evaluation – Event Summary



Audi
FIS Ski World Cup

Expertise by Nielsen Sports
Your contacts: Alexander Karduck, Pascal Klein



Introduction

Study scope

Object of investigation/event:	Audi FIS Ski World Cup
Monitoring period:	2022/23 Season
Sponsors:	Audi, Longines, Resort
Markets*:	Austria, Bulgaria, Canada, China, Croatia, Czech Republic, Denmark, Finland, France, Germany, Italy, Japan, Netherlands, Norway, Poland, Slovakia, Slovenia, South Korea, Spain, Sweden, Switzerland, United Kingdom, USA
TV program types:	Live, Delayed, Relive, Highlights, Sport Magazines, Magazines, News
Sources of audience data:	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 Due to US sanctions against Russia Nielsen has withdrawn from the market.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

Audi FIS Ski World Cup 2022/23

	Live	Non-Live	TOTAL	TOTAL 2021/22	
Audi FIS Ski WC	Cumulative Audience* (M)	347.64	1,868.74	2,216.38	2,379.88
	Number of Broadcasts (#)	3,690	18,096	21,786	25,213
	Broadcast Time (hh:mm:ss)	4695:47:36	9159:04:16	13854:51:52	14409:27:21
	Actual Playing Time (hh:mm:ss)	3554:36:53	7754:22:47	11308:59:40	12336:39:15
	Event Impressions (M)	44,400.08	13,805.30	58,205.38	60,312.98
Sponsorship Evaluation	Visibility (hh:mm:ss)	3798:10:27	7722:59:48	11521:10:15	11981:29:35
	Sponsorship Impressions (M)	35,490.50	9,233.93	44,724.43	45,791.31
	100% Media Equivalency (€)	526,093,213	152,290,608	678,383,821	739,443,967
	Q1 Media Value (€)	126,157,165	35,993,645	162,150,810	176,323,523
	Average Sequence Duration (sec.)	4.35	4.07	4.11	4.04
	Ratio Visibility/Broadcast Time (%)	80.88	84.55	83.16	83.14

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

Key Insights

Cumulative Audience

Declined by 163 compared to 2021/22 (-6%). While live audience remains almost unchanged, the number of news and magazine features has decreased. In Germany, the audience increased by 80M compared to last season (+16%).

Broadcast Time

Dropped by more than 500 hours mainly due to less relive broadcasts on Eurosport. In contrast, live coverage increased by 600 hours. Especially Slovakia (+298 hours) and Austria (183 hours) record a significant increase in broadcast time.

Visibility

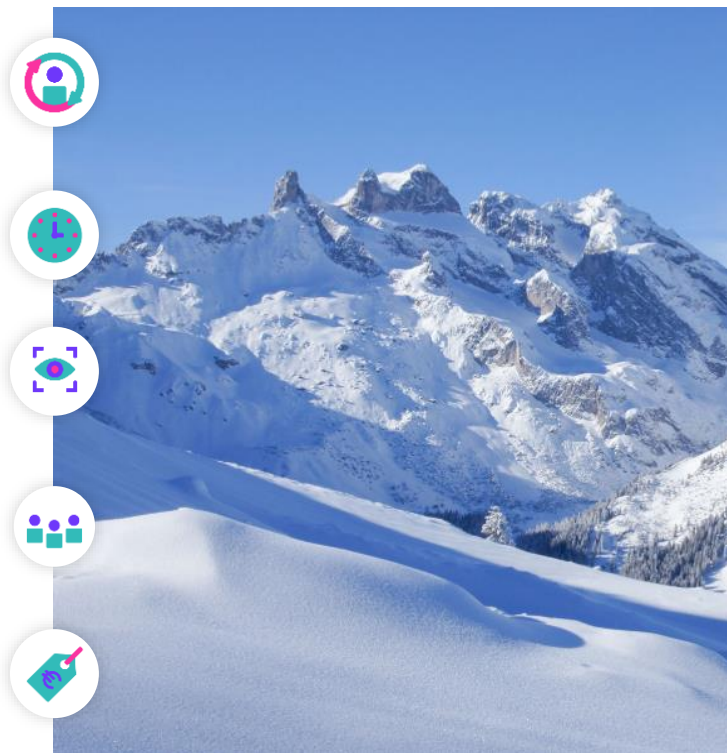
Combined all brands were visible for 11,500h which corresponds to a share of 83% in terms of broadcast time (-500h compared to 2021/22). All partners nearly achieved the same share of visibility. Resort accounts for 36% of the total visibility followed by Audi (33%) and Longines (31%).

Sponsorship Impressions

45bn sponsorship impressions mean a slight decline of 2% compared to the last season. Audi generated the highest impact with 16bn sponsorship impressions.

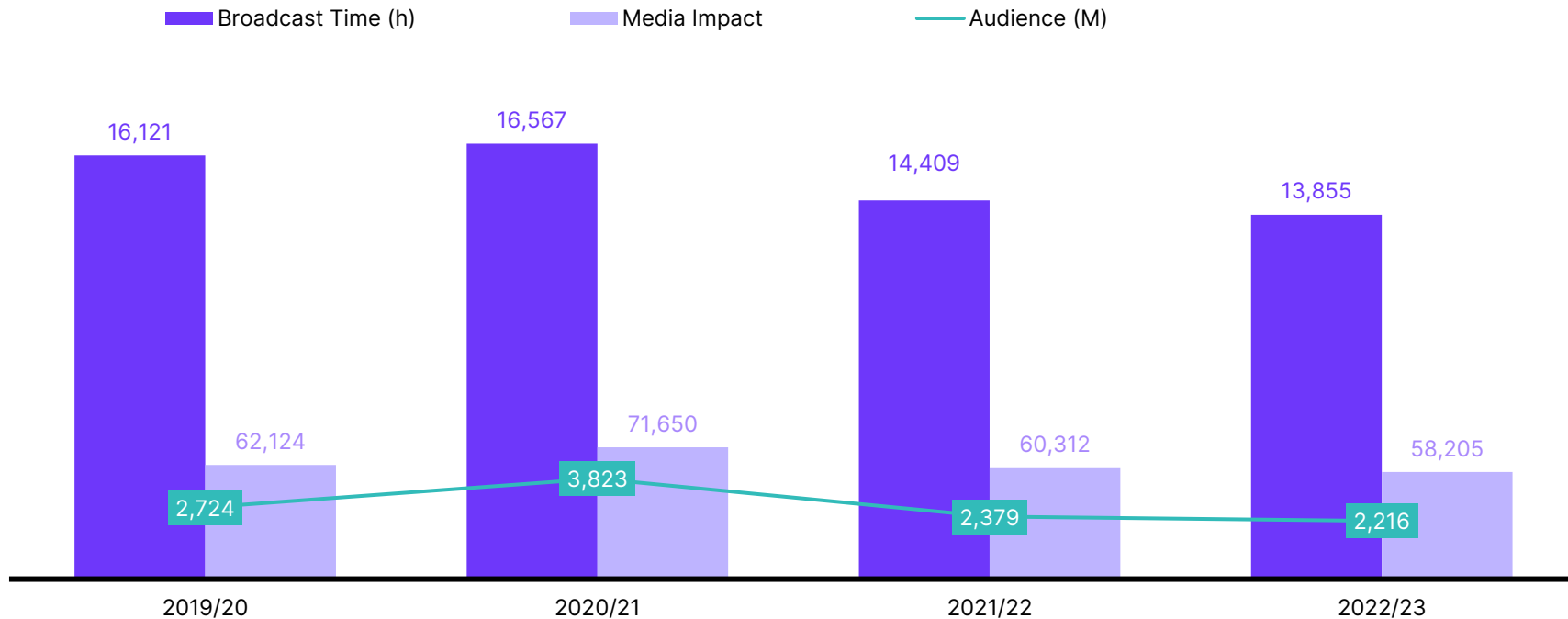
QI Media Value

Switzerland generated €39M and is thus responsible for 24% of the total generated Media Value. Compared to the previous season, total QI Media Value declined by 8%.



Key Insights

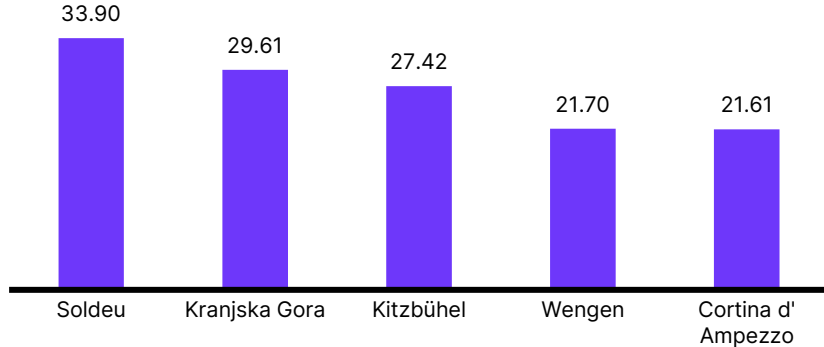
Year-on-year development



Management Summary

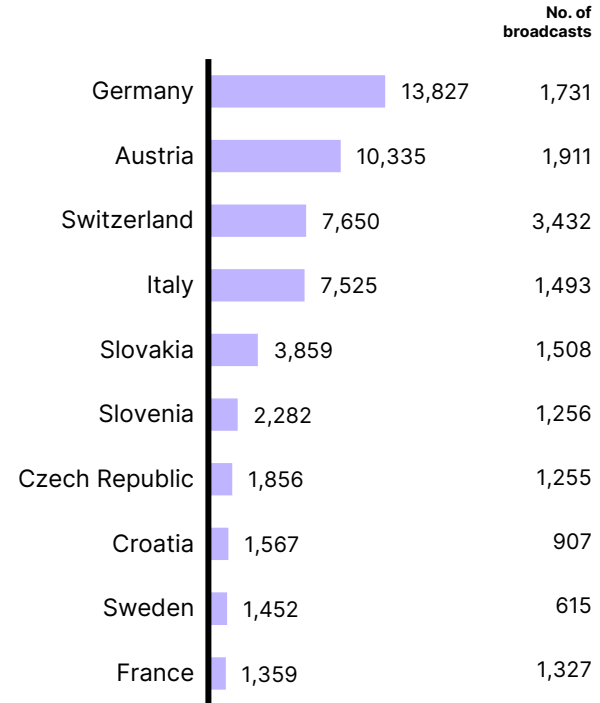
Media Monitoring

Top 5 Venues by Cumulative Live Audience (M)



- The season final in Soldeu traditionally was the venue with the highest cumulative live audience.
- Compared to the final in Courchevel/Meribel 2022, numbers declined by 2M.
- Kranjska Gora ranks second this year with an increase by more than 6M.
- The prestigious races in Kitzbühel and Wengen once again make it into the top 5 with the Slalom in Kitzbühel being the best performing race of the season.
- Germany and Austria remain the top two markets concerning the media impact even though Germany faces a decline of 1.4 billion impressions (-9%).

Event Impressions by Market – Top-10 (M)

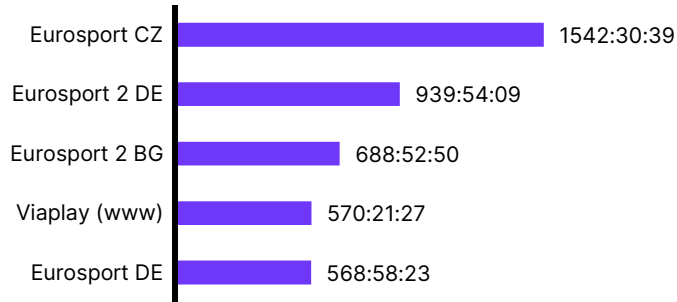


*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+ /Estimations by Nielsen Sports

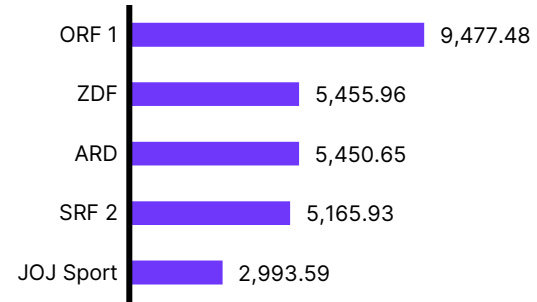
Management Summary

Media Monitoring

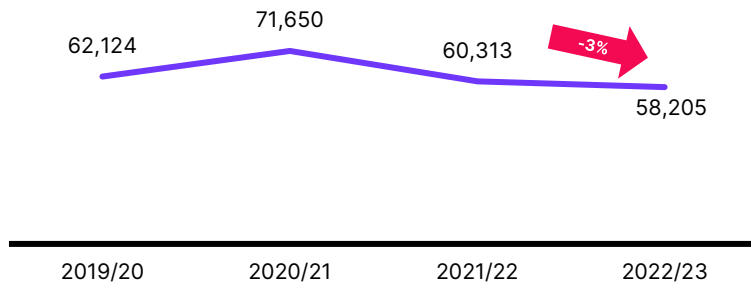
Top 5 Channels by Broadcast Time (hh:mm:ss)



Top 5 Channels by Event Impressions (M)



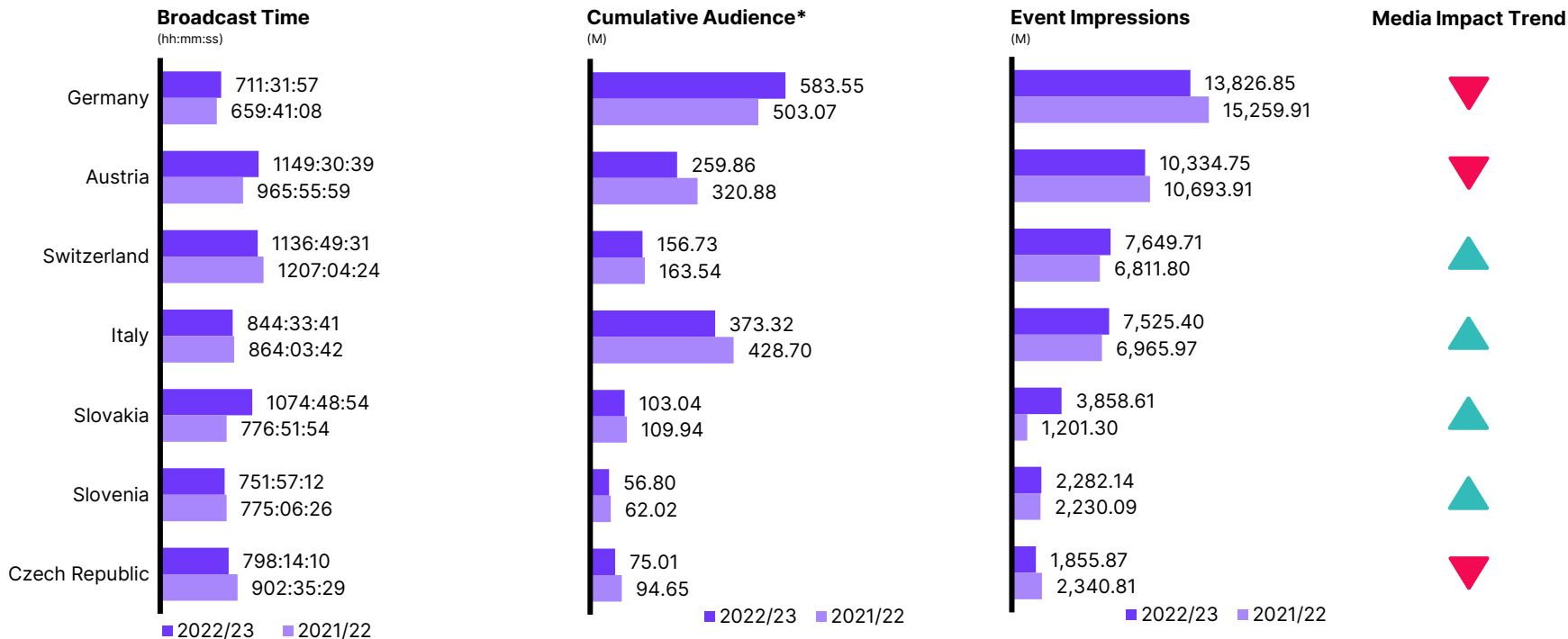
World Cup Event Impressions Trend (M)



- Eurosport provides 12 of the 15 channels with the highest broadcast time. Together, the Eurosport channels account for 67% of the total coverage.
- The broadcast time of the OTT channel Viaplay has more than doubled compared to the previous year.
- Apart from Rai Sport+ HD the top 5 channels in terms of media impact remain unchanged – together they accounts for 49% of the total media impact.
- ARD & ZDF together face a decline by 14% compared to last season.
- Slovakian channel JOJ Sport makes it into the top 5 for the first time thanks to extensive live coverage of the Alpine Ski World Cup.

Media Monitoring

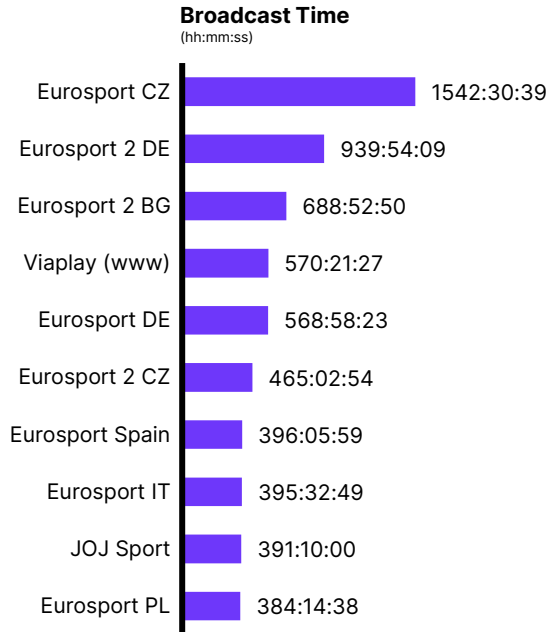
Top 7 trending countries by Event Impressions



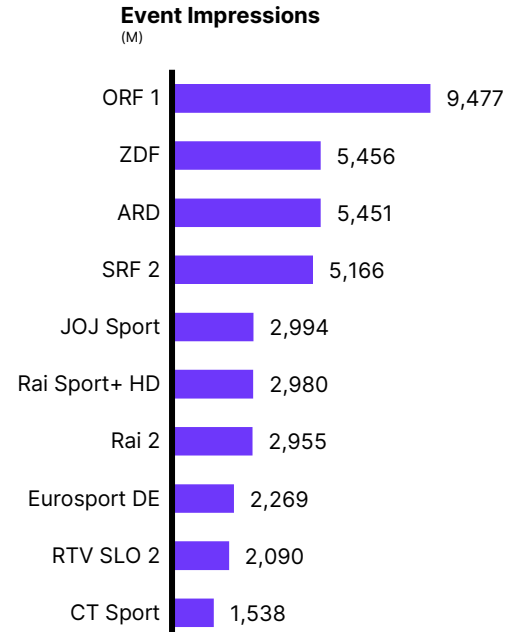
*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+/Estimations by Nielsen Sports

Media Monitoring

Top 10 channels



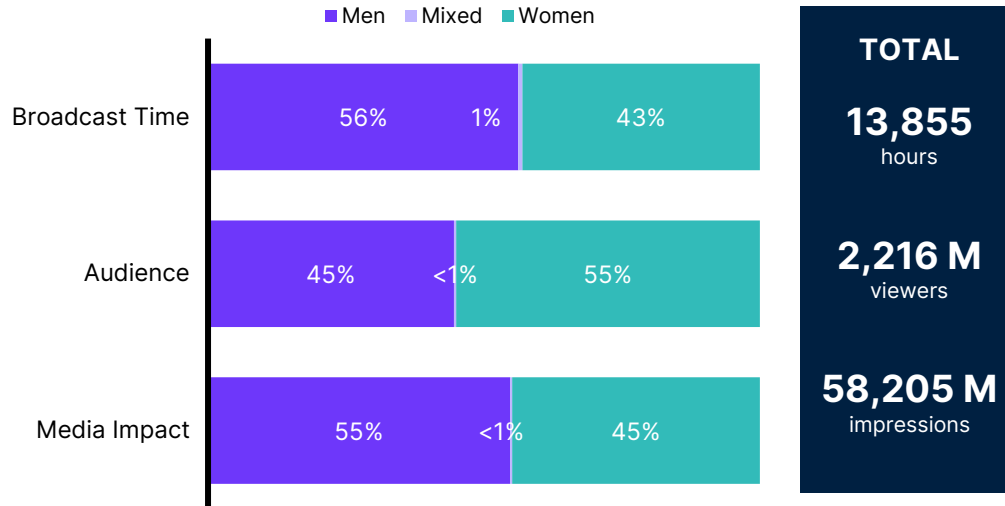
46% OF TOTAL



69% OF TOTAL

Media Monitoring

Gender comparison



Media Monitoring

Weekly coverage trend

Broadcast Time

(hh:mm:ss)

1000:00:00

750:00:00

500:00:00

250:00:00

00:00:00

42 43 44 45 46 47 48 49 50 51 52 1 2 3 4 5 6 7 8 9 10 11 12 13

Men Women

Cumulative Audience*

(M)

200

150

100

50

0

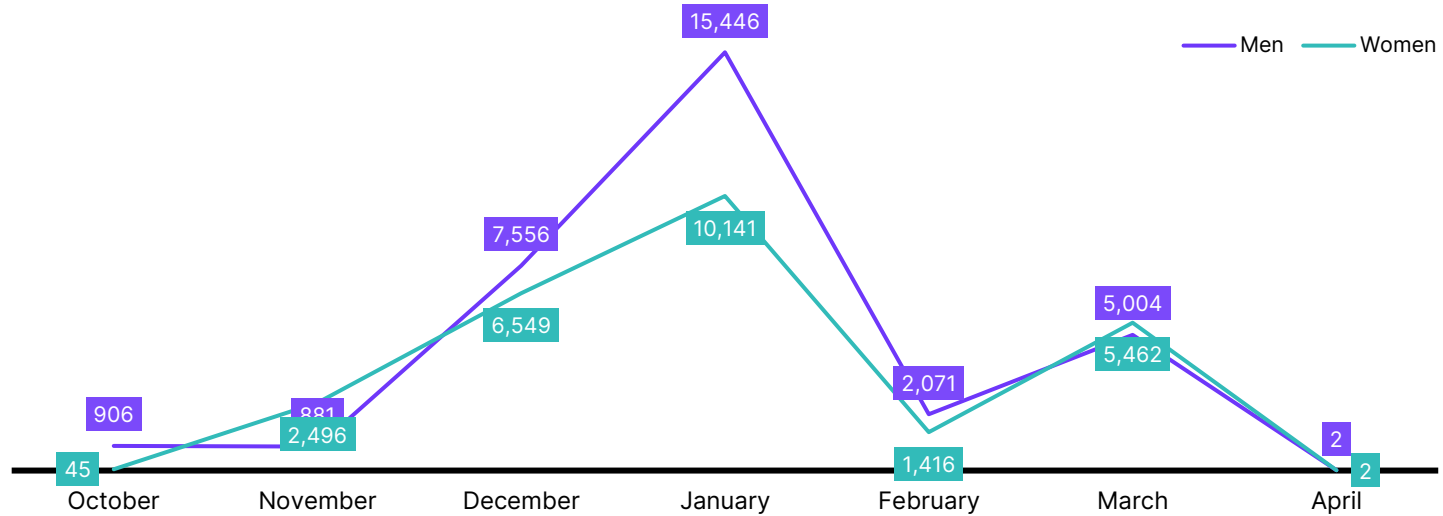
42 43 44 45 46 47 48 49 50 51 52 1 2 3 4 5 6 7 8 9 10 11 12 13

Men Women

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

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.).

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

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



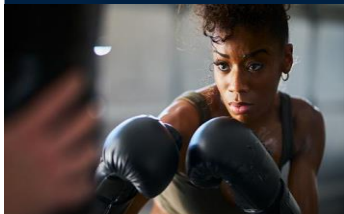
Nielsen Sports is the global leader in sports media valuation, data intelligence and research consulting.

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.

Gold standard



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

Global solution



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.

Nielsen expertise is unsurpassed

No other sports media valuation or research company has the depth and breadth of Nielsen Sport



**15,000+ teams,
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



**150,000
brands**

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



**50+ Global
markets**

of world-class audience measurement data, unique to Nielsen



**Billions of
data points**

created through algorithmic valuation and frame by frame video analysis

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