



Viessmann FIS Nordic Combined World Cup 2022/23

TV Media Evaluation – Event Summary



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



Introduction

Study scope

Object of investigation/event:	FIS Nordic Combined World Cup 2022/23 (Men, Women and Mixed)
Monitoring period:	2022/23 Season
Sponsors:	Viessmann, FIS App
Markets*:	Austria, Finland, France, Germany, Italy, Japan, Norway, Switzerland, 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 Due to US sanctions against Russia Nielsen has withdrawn from the market.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

FIS Nordic Combined World Cup 2022/23 – Men, Women & Mixed

	Live	Non-Live	TOTAL	TOTAL 2021/22	
FIS Nordic Combined WC	Cumulative Audience* (M)	87.33	296.15	383.48	489.24
	Number of Broadcasts (#)	588	966	1,554	1,646
	Broadcast Time (hh:mm:ss)	436:41:55	294:05:55	730:47:50	657:33:27
	Actual Playing Time (hh:mm:ss)	346:02:29	237:36:32	583:39:01	518:05:20
	Event Impressions (M)	5,277	1,940	7,217	8,531
Sponsorship Evaluation	Visibility (hh:mm:ss)	235:45:37	177:06:52	412:52:29	525:20:17
	Sponsorship Impressions (M)	3,122,40	997.44	4,119.84	6,945.38
	100% Media Equivalency (€)	40,705,354	15,693,457	56,398,811	84,922,924
	QI Media Value (€)	7,482,751	2,897,614	10,380,365	15,217,729
	Average Sequence Duration (sec.)	5.6	5.9	5.7	6.2
	Ratio Visibility/Broadcast Time (%)	54.0	60.2	56.5	79.9

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

Global Overview

FIS Nordic Combined World Cup 2022/23 – Men

	Live	Non-Live	TOTAL	TOTAL 2021/22	
FIS Nordic Combined WC	Cumulative Audience* (M)	68.90	236.79	305.69	439.24
	Number of Broadcasts (#)	401	796	1,195	1,325
	Broadcast Time (hh:mm:ss)	314:56:23	250:09:19	565:05:42	496:13:42
	Actual Playing Time (hh:mm:ss)	247:12:41	202:55:02	450:07:43	382:19:21
	Event Impressions (M)	4,449	1,466	5,915	7,616
Sponsorship Evaluation	Visibility (hh:mm:ss)	163:53:46	149:37:14	313:31:00	385:59:00
	Sponsorship Impressions (M)	2,486.45	703.82	3,190.27	6,199.27
	100% Media Equivalency (€)	32,276,376	12,156,522	44,432,899	75,445,782
	QI Media Value (€)	5,993,361	2,236,507	8,229,868	13,459,559
	Average Sequence Duration (sec.)	5.6	5.9	5.8	6.0
	Ratio Visibility/Broadcast Time (%)	52.1	59.8	55.5	77.8

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

Global Overview

FIS Nordic Combined World Cup 2022/23 – Women & Mixed

		Live	Non-Live	TOTAL	TOTAL 2021/22
FIS Nordic Combined WC	Cumulative Audience* (M)	20.97	106.02	126.99	68.84
	Number of Broadcasts (#)	199	255	454	432
	Broadcast Time (hh:mm:ss)	121:45:32	43:56:36	165:42:07	161:19:44
	Actual Playing Time (hh:mm:ss)	98:49:48	34:41:30	133:31:18	135:45:59
	Event Impressions (M)	827.71	474.30	1,302.01	915.58
Sponsorship Evaluation	Visibility (hh:mm:ss)	71:51:51	27:29:39	99:21:29	139:21:17
	Sponsorship Impressions (M)	635.95	293.63	929.57	746.00
	100% Media Equivalency (€)	8,428,978	3,536,935	11,965,913	9,477,141
	QI Media Value (€)	1,489,389	661,108	2,150,497	1,758,170
	Average Sequence Duration (sec.)	5.5	5.6	5.6	6.7
	Ratio Visibility/Broadcast Time (%)	59.0	62.6	60.0	86.3

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

Key Insights

- Broadcast time increases by 11% while media impact declines by 15% compared to the previous season
- Austria and Switzerland have positive media impact trends
- Women's World Cup reaches more than 1 billion event impressions

Cumulative Audience

declines by 22% compared to the previous season (-106M). The less sportive success of German athletes in 2022/23 led to fewer broadcasts, especially in news and magazine coverage. However, the country remains the top market in terms of audience, accounting for 70% of viewers.

Broadcast Time

increased by 73h (+11%) compared to 2021/22. Main reason is an increased coverage on Viaplay in Norway and Finland (+43h; +96%). As the Russian market has not been covered in the analysis for this season, Eurosport's total coverage goes down from 326h to 288h year-over-year.

Event Impressions (Media Impact)

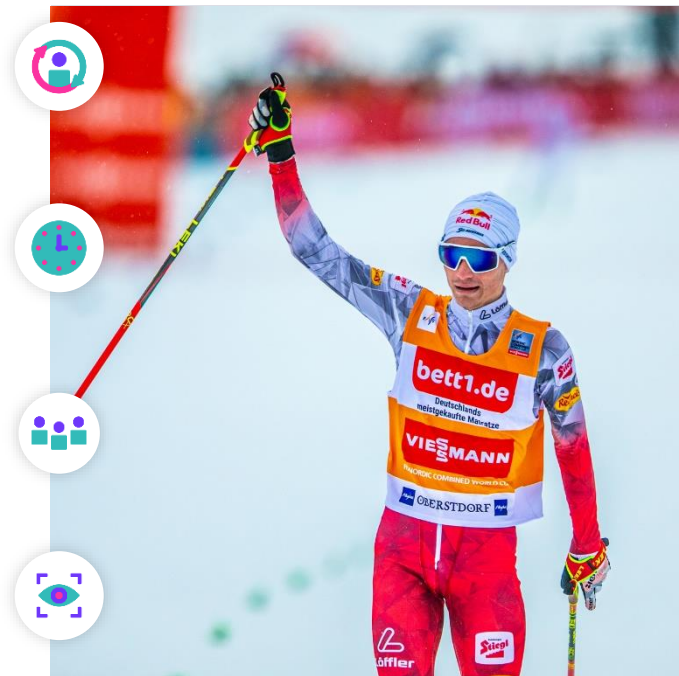
decreased by 15% compared to 2021/22. While the Men's World Cup declines by -22%, media impact of the Women's World Cup sees a huge increase (+69%) and reached more than 1 billion Event Impressions.

Austria, with its Men's World Cup winner Johannes Lamparter (+13%; +102M) and Switzerland (+96%) have positive trends in terms of media impact.

Sponsorship Visibility

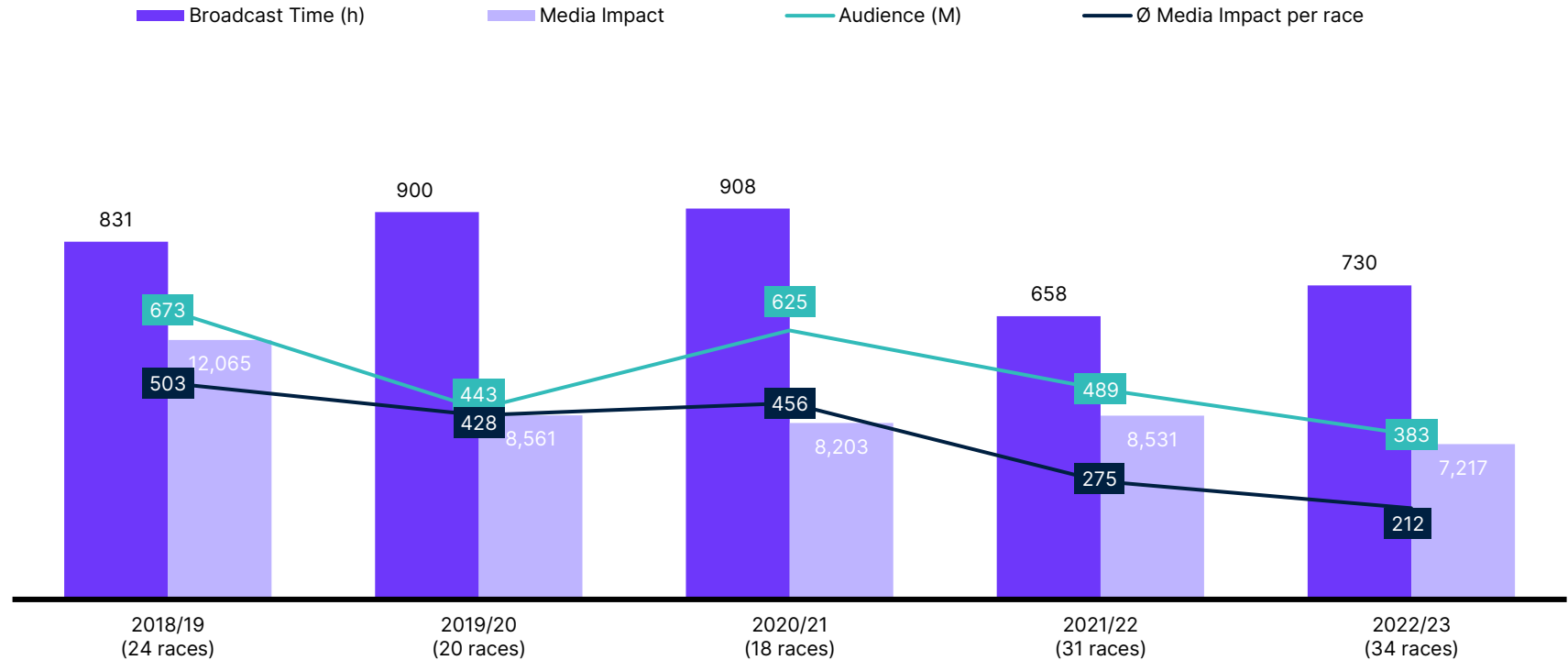
The Start Backdrop proved to be the most visible tool for the two FIS partners Viessmann and FIS App. With a total exposure time of 83h, it accounts for 20% of all advertising tools.

Cross-Country Skiing accounts for narrowly two thirds (64%) of partner visibility, Ski Jumping for one third.



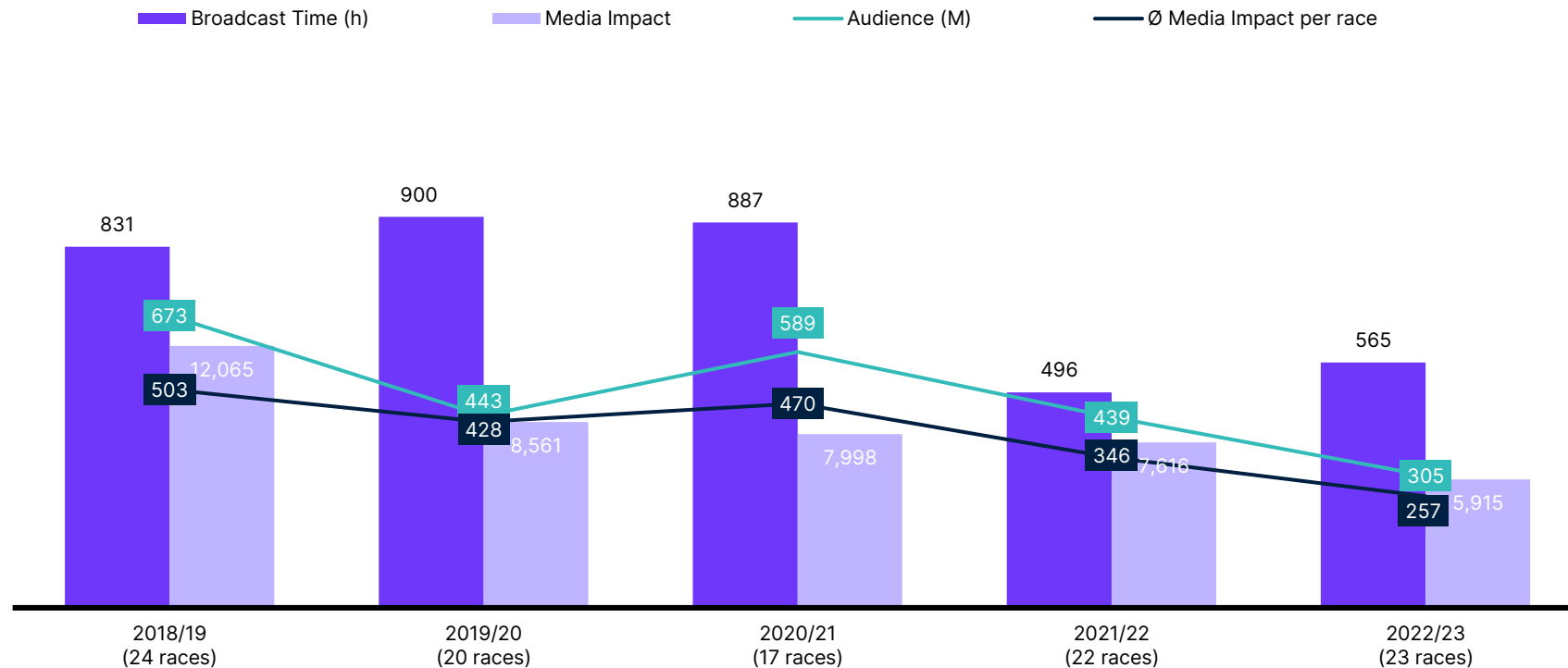
Key Insights

Year-on-year development (since 2020/21, including Women; since 2021/22, including Mixed)



Key Insights

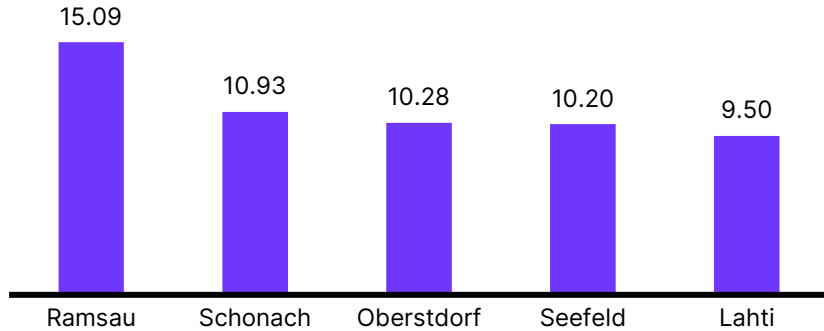
Year-on-year development (Men)



Management Summary

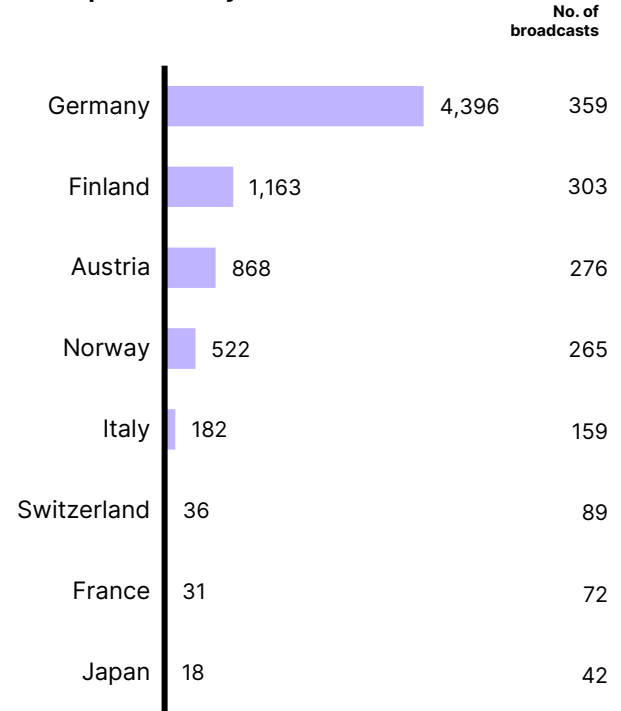
Media Monitoring

Top 5 Venues by Cumulative Live Audience* (M)



- Ramsau, prior to the Christmas break, ranks top in terms of cumulative live audience thanks to broad live coverage on ARD in Germany (9.6M) and ORF 1 in Austria (1.2M).
- Schonach, hosting two women's and men's competitions each, follows closely behind with notable coverage on German ZDF (9.5M) and ORF 1 (0.7M).
- The top 5 in the country ranking by media impact remain unchanged year-over-year. Switzerland (+15M Event Impressions) moves up from 9th to 6th place.

Event Impressions by Market (M)

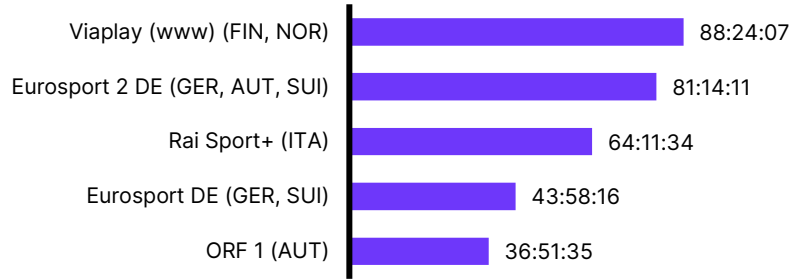


*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+ /Estimations by Nielsen Sports

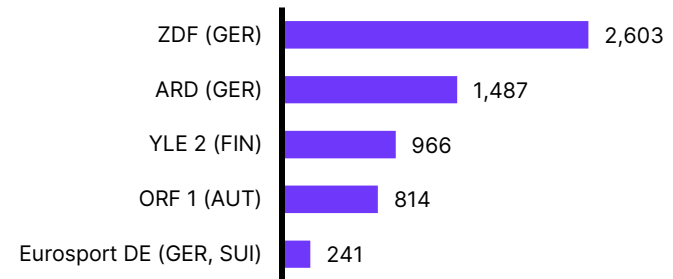
Management Summary

Media Monitoring

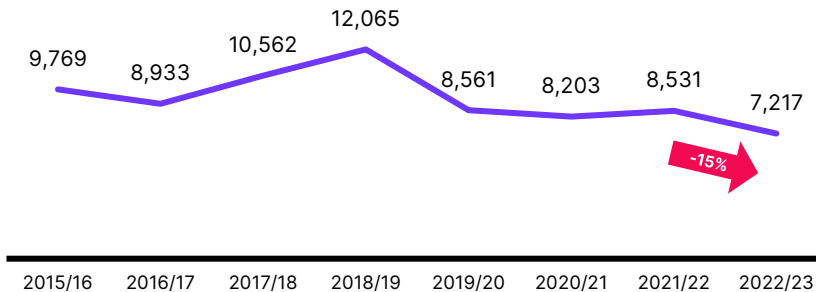
Top 5 Channels by Broadcast Time (hh:mm:ss)



Top 5 Channels by Event Impressions (M)



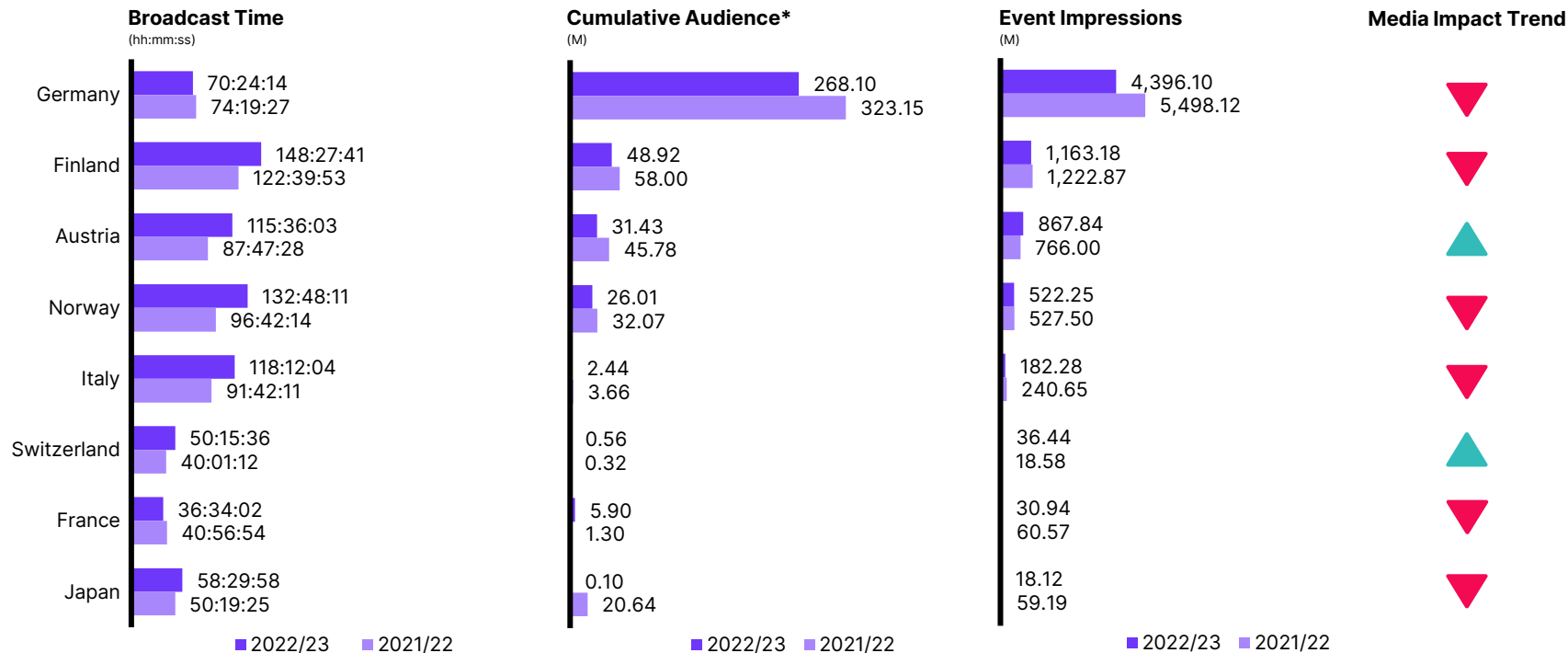
World Cup Event Impressions Trend (M)



- Eurosport covers 7 out of the top 15 channels in terms of broadcast time. In total, Eurosport was responsible for 39% of the total generated broadcast time.
- A major reason for the reduced domination of Eurosport with regards to broadcast time is the NENT group as the main broadcast partner in the Nordic region with its OTT platform Viaplay.
- NRK 1 lost its position in Top 5 channels by Event Impressions against Eurosport DE. Due to the right holder change in Norway two years ago, the public station lost another 130M Event Impressions.
- Together, these 5 channels account for 85% of total media impact.

Media Monitoring

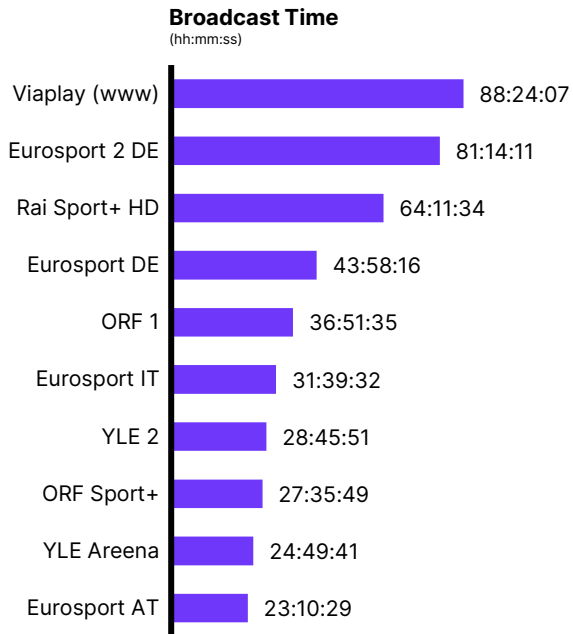
Top 8 trending countries by Event Impressions



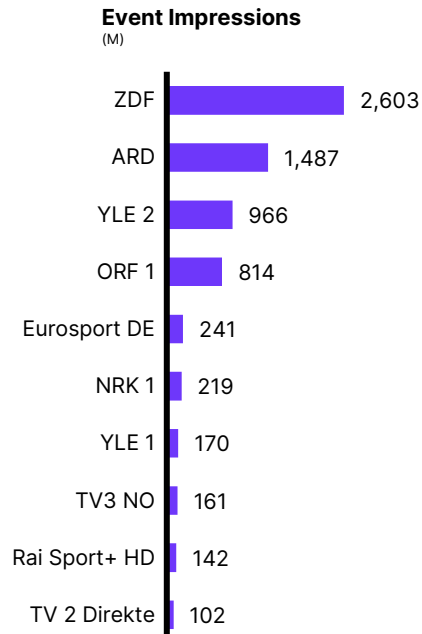
*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+ /Estimations by Nielsen Sports

Media Monitoring

Top 10 channels



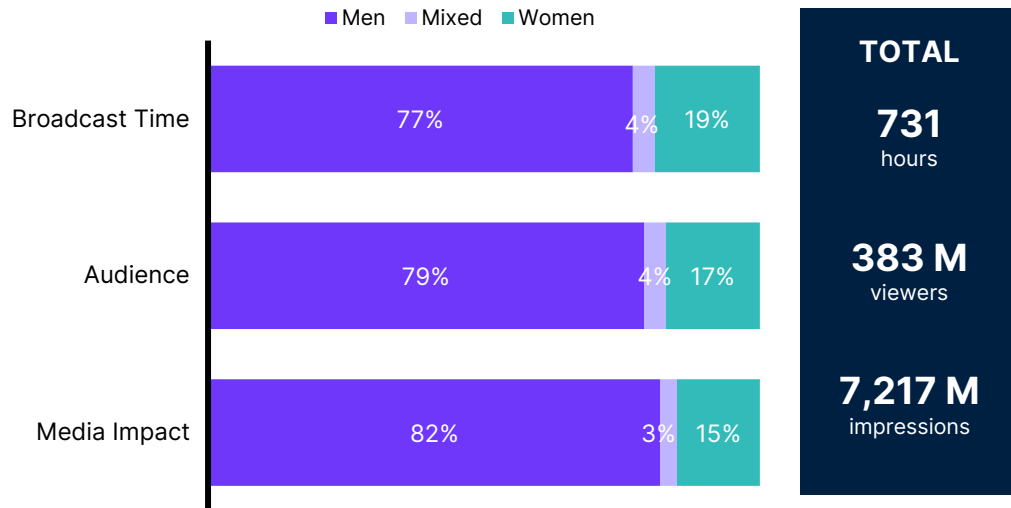
62% OF TOTAL



96% OF TOTAL

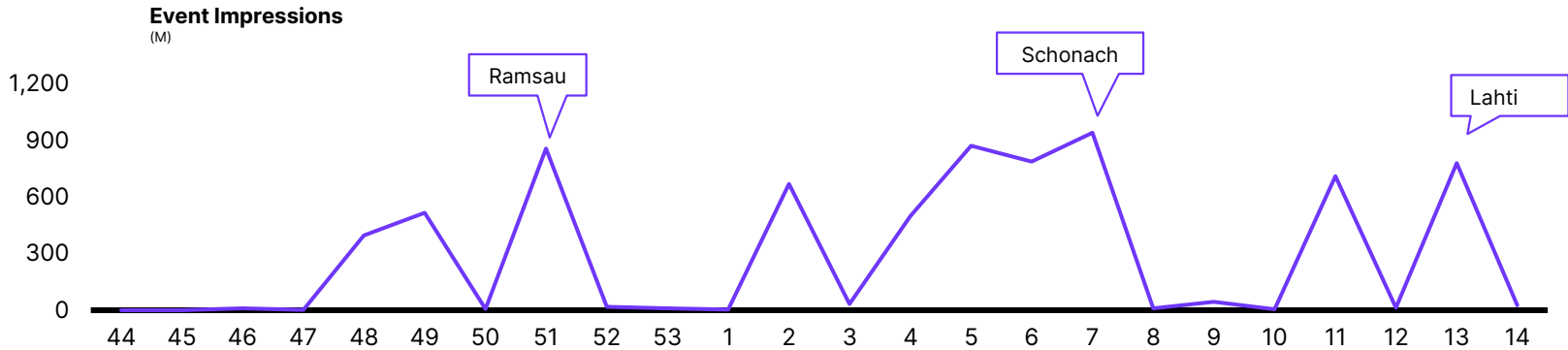
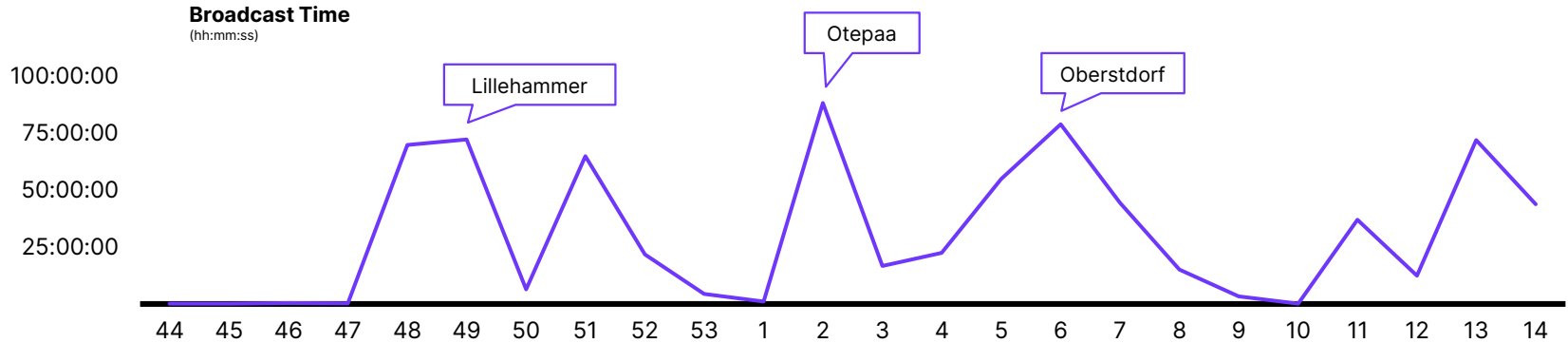
Media Monitoring

Gender comparison



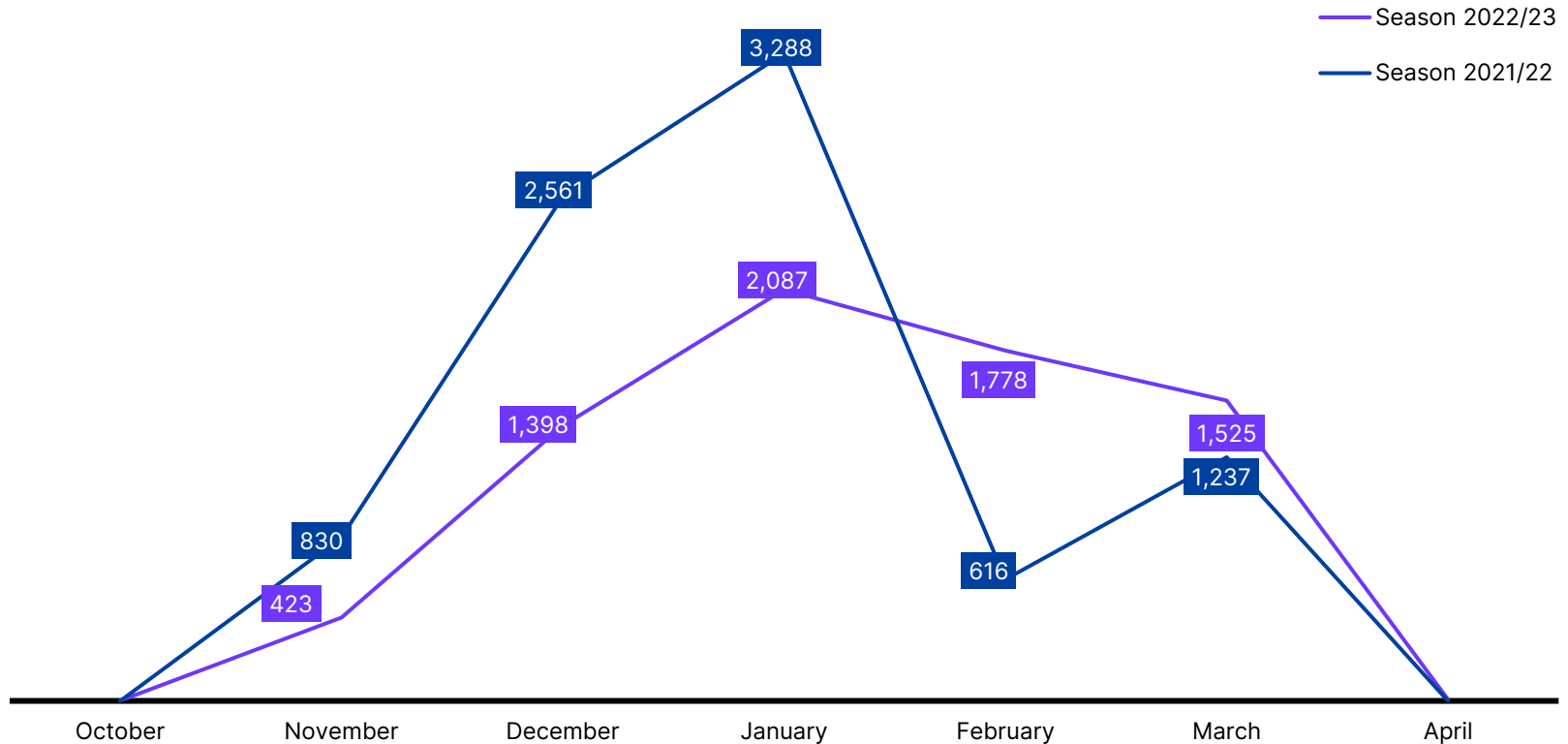
Media Monitoring

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.).

Program types

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.
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Secondary coverage (secondary broadcasting)

Magazine / Sportmagazine	Programs that rarely feature sports content or general sports mix programs
News	Contributions in news broadcasts

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 offset against the associated audience of that program.

Formula:

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



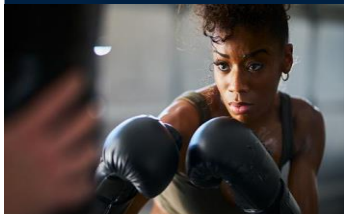
Nielsen Sports is the global leader in sports media valuation, data intelligence and research consulting.

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

Contact details



Alexander Karduck

Account Director
Nielsen Sports

Tel.: +49 221 430 73 638

alexander.karduck@nielsen.com



Pascal Klein

Project Manager
Nielsen Sports

Tel.: +49 162 1084043

pascal.klein@nielsen.com

Nielsen Sports Deutschland GmbH
Scheidtweilerstr. 17
50933 Köln
niensensports.com



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