



Coop FIS Cross Country World Cup 2022/23

TV Media Evaluation – Event Summary



Expertise by Nielsen Sports
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Source: https://www.fis-ski.com/en/competitions/cross-country/news-multi-media-delivered-21-22/the-season-2021-22

Introduction

Study scope

Object of investigation/event:	Coop FIS Cross Country World Cup
Monitoring period:	2022/23 Season
Sponsors:	Certina, Coop, Extra, FIS TikTok, Le Gruyère AOP, Würth
Markets*:	Austria, Canada, China, Czech Republic, Estonia, Finland, France, Germany, Italy, Norway, Poland, Slovenia, South Korea, 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 Due to US sanctions against Russia Nielsen has withdrawn from the market. However, there have been broadcasts of the 2022/23 season in Russia.

Presentation of results

Global Overview

FIS Cross Country World Cup 2022/23

	Live	Non-Live	TOTAL	TOTAL 2021/22	
FIS Cross Country WC	Cumulative Audience* (M)	105.64	584.71	690.35	932.50
	Number of Broadcasts (#)	1,312	4,696	6,008	5,818
	Broadcast Time (hh:mm:ss)	1405:53:33	1865:34:35	3271:28:08	2361:06:26
	Actual Playing Time (hh:mm:ss)	1143:44:02	1667:50:19	2811:34:21	2004:34:36
	Event Impressions (M)	13,030.34	4,701.31	17,731.64	21,423.73
Sponsorship Evaluation	Visibility (hh:mm:ss)	1889:08:49	2500:15:15	4389:24:04	4229:32:04
	Sponsorship Impressions (M)	17,386.01	4,734.48	22,120.49	34,744.71
	100% Media Equivalency (€)	202,492,567	67,836,874	270,329,441	312,589,351
	QI Media Value (€)	39,947,221	13,861,493	53,808,713	64,803,177
	Average Sequence Duration (sec.)	5.04	4.81	4.90	5.0
	Ratio Visibility/Broadcast Time (%)	134.37	134.02	134.17	179.1

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

Global Overview

FIS Cross Country World Cup 2021/22 – Men (excl. Mixed)

	Live	Non-Live	TOTAL	TOTAL 2021/22	
FIS Cross Country WC	Cumulative Audience* (M)	61.38	305.33	366.70	597.70
	Number of Broadcasts (#)	717	2,609	3,326	3,735
	Broadcast Time (hh:mm:ss)	654:24:49	851:56:56	1506:21:45	1304:10:08
	Actual Playing Time (hh:mm:ss)	530:22:49	767:41:38	1298:04:27	1095:25:39
	Event Impressions (M)	5,874.04	1,884.14	7,758.18	10,784.09
Sponsorship Evaluation	Visibility (hh:mm:ss)	900:27:31	1162:58:10	2063:25:41	2397:10:27
	Sponsorship Impressions (M)	7,857.37	1,890.74	9,748.12	17,839.33
	100% Media Equivalency (€)	94,854,535	29,010,651	123,865,185	159,618,946
	QI Media Value (€)	18,747,055	5,894,028	24,641,083	33,401,938
	Average Sequence Duration (sec.)	4.92	4.71	4.80	5.0
	Ratio Visibility/Broadcast Time (%)	137.60	136.51	136.98	183.8

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

Global Overview

FIS Cross Country World Cup 2021/22 – Women (excl. Mixed)

	Live	Non-Live	TOTAL	TOTAL 2021/22	
FIS Cross Country WC	Cumulative Audience* (M)	70.26	448.38	518.64	644.39
	Number of Broadcasts (#)	751	2,873	3,624	3,560
	Broadcast Time (hh:mm:ss)	710:22:54	927:27:09	1637:50:02	997:46:09
	Actual Playing Time (hh:mm:ss)	581:46:21	822:15:38	1404:01:59	857:14:47
	Event Impressions (M)	6,878.18	2,630.60	9,508.79	10,360.31
Sponsorship Evaluation	Visibility (hh:mm:ss)	962:00:33	1267:45:39	2229:46:12	1775:06:46
	Sponsorship Impressions (M)	9,312.80	2,691.69	12,004.49	16,706.79
	100% Media Equivalency (€)	105,709,462	36,724,231	142,433,693	151,110,862
	QI Media Value (€)	20,851,478	7,569,512	28,420,990	31,087,575
	Average Sequence Duration (sec.)	5.15	4.90	5.01	4.9
	Ratio Visibility/Broadcast Time (%)	135.42	136.69	136.14	177.9

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

Key Insights

- Overall values went down due to the exclusion of Russia from the analysis.
- Without Russia, media impact even increased by 27% compared to last season.
- However, the media impact per race still declined by 14%.

Cumulative Audience

declined by 242M (-26%) compared to the 2021/22 season. Main reason is Russia which contributed an audience of 271M last year.

In Germany, audience increased by 51% especially due to more wide-reaching news features on ZDF & MDR.

Broadcast Time

increased by 910 hours (+38%). Due to Covid-19 and the Ukraine war eight men's and women's races had to be cancelled in 2021/22. As a result, the live broadcast time increased from 883 hours to 1,406 hours. Italy was once again the market with the highest broadcast time (390 hours).

Event Impressions (Media Impact)

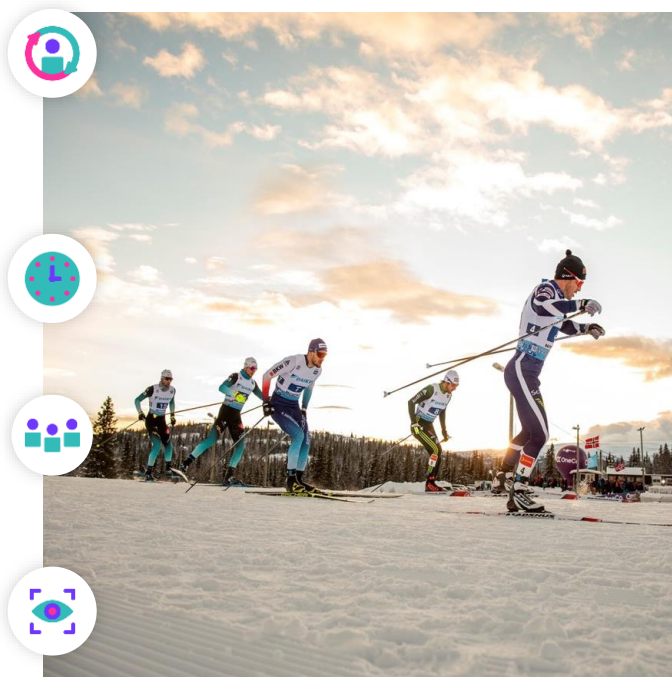
declined by 3.7bn (-17%) overall. Excluding Russia, impressions increased by 27% compared to last season due to 22 more races and thus a higher broadcast time. In contrast, the media impact per race decreased by 14%.

All seven top markets see a positive trend in terms of media impact – especially in Italy (+83%), Norway (+47%) and Germany (+33%) numbers went up.

Sponsorship Visibility

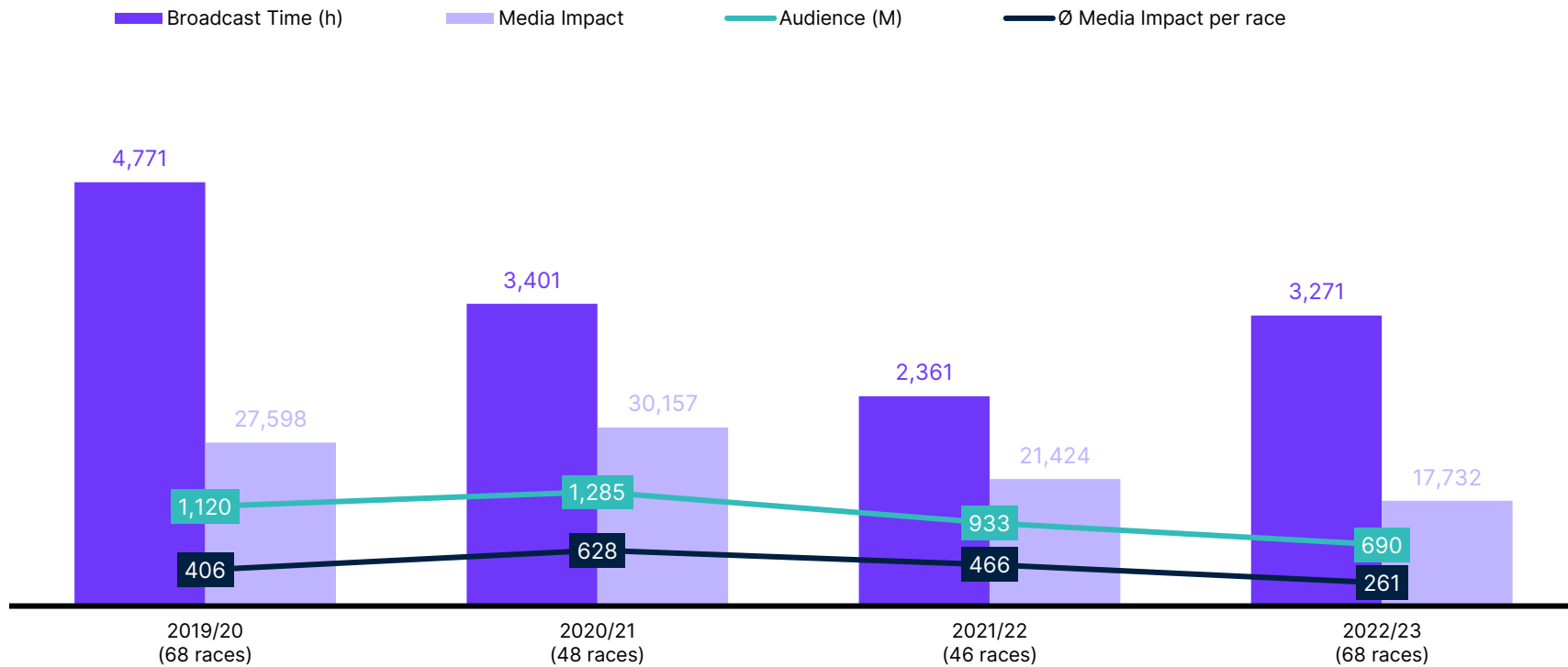
Title Sponsor Coop accounts for 67% of FIS World Cup partners' visibility. Further 18% were contributed by Le Gruyère AOP (replacing Audi as Presenting Sponsor).

The Banner Course is again the tool with the highest exposure time (679h) across all partners.



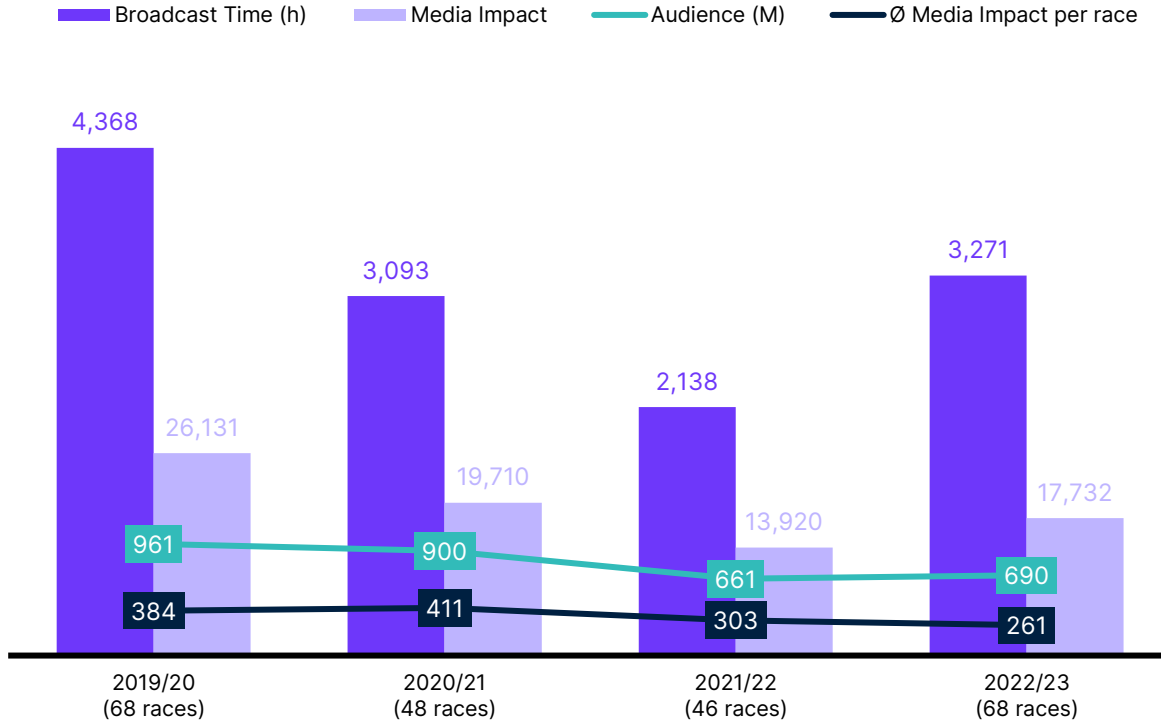
TV Coverage Trend

Year-on-year development



TV Coverage Trend

Year-on-year development (excl. Russia)



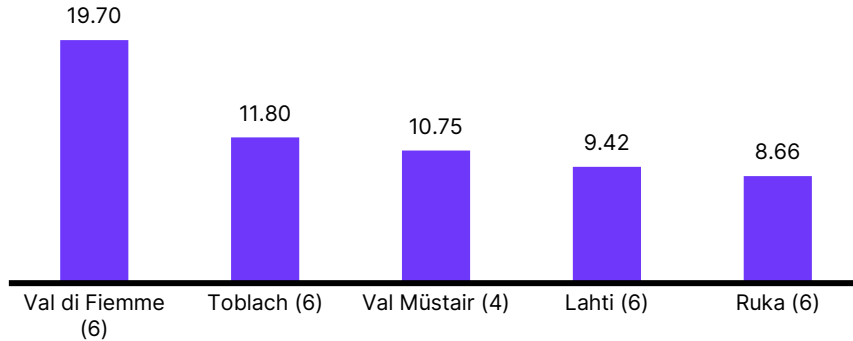
- Removing Russia from the year-on-year comparison, the media impact increased by 27%.
- The cumulative audience also went up, but at a comparatively low level (+4%).
- Russia was the top market in 2021/22 being responsible for 35% of the total event impressions and 29% of the total audience.
- Since there were 22 more races held in the 2022/23 season, the broadcast time increased by 53%.
- However, the media impact per race is around 14% lower than last season.

Management Summary

Media Monitoring

Top 5 Venues by Cumulative Live Audience (M)

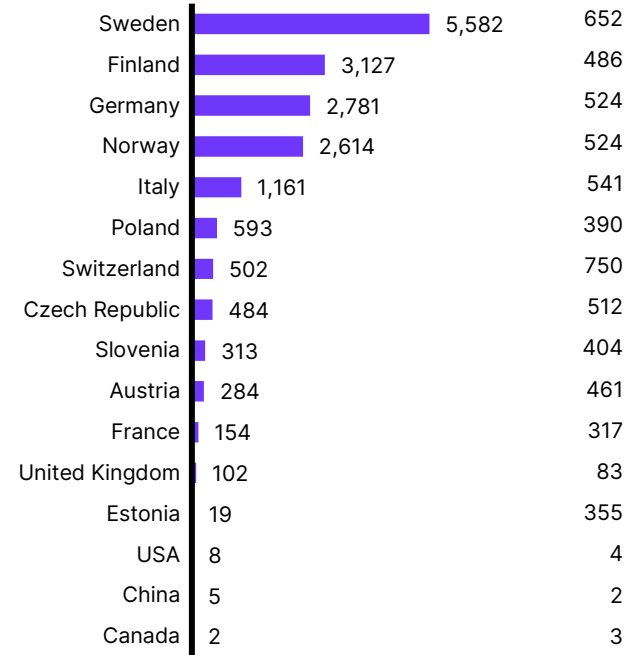
(x) = No. of races



- Val di Fiemme outperforms all other venues in terms of live audience. Compared to the previous season, live audience increased by almost 4M. Major proportion of this audience comes from German channel ZDF which aired 4 races live (6.68M). Furthermore, audience ratings on TV6 SE and YLE 2 were above average.
- Val Müstair ranks third despite of the lower number of races compared to the other top venues.
- Apart from Russia which had to be excluded from the analysis, the first 5 spots of the country ranking by media impact remain unchanged to the previous season.
- All top markets show a positive trend – especially Italy (+82%), Germany (+32%) and Sweden (+31%).

Event Impressions by Market (M)

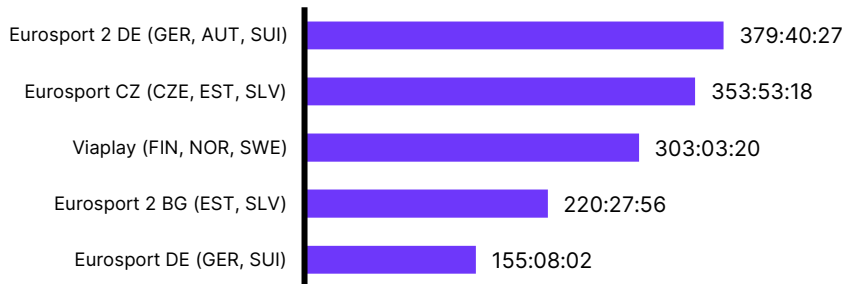
No. of broadcasts



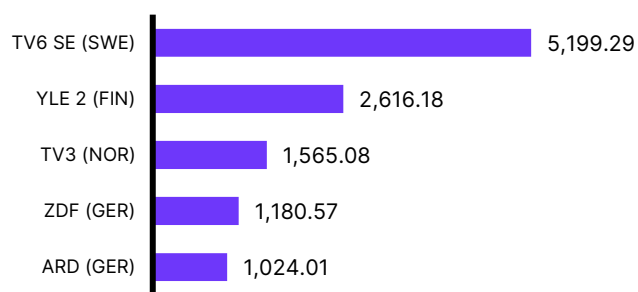
Management Summary

Media Monitoring

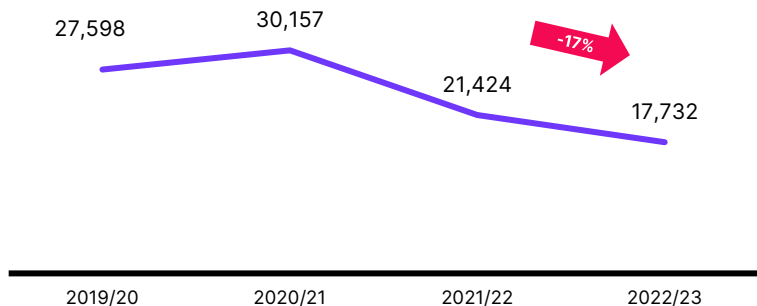
Top 5 Channels by Broadcast Time (hh:mm:ss)



Top 5 Channels by Event Impressions (M)



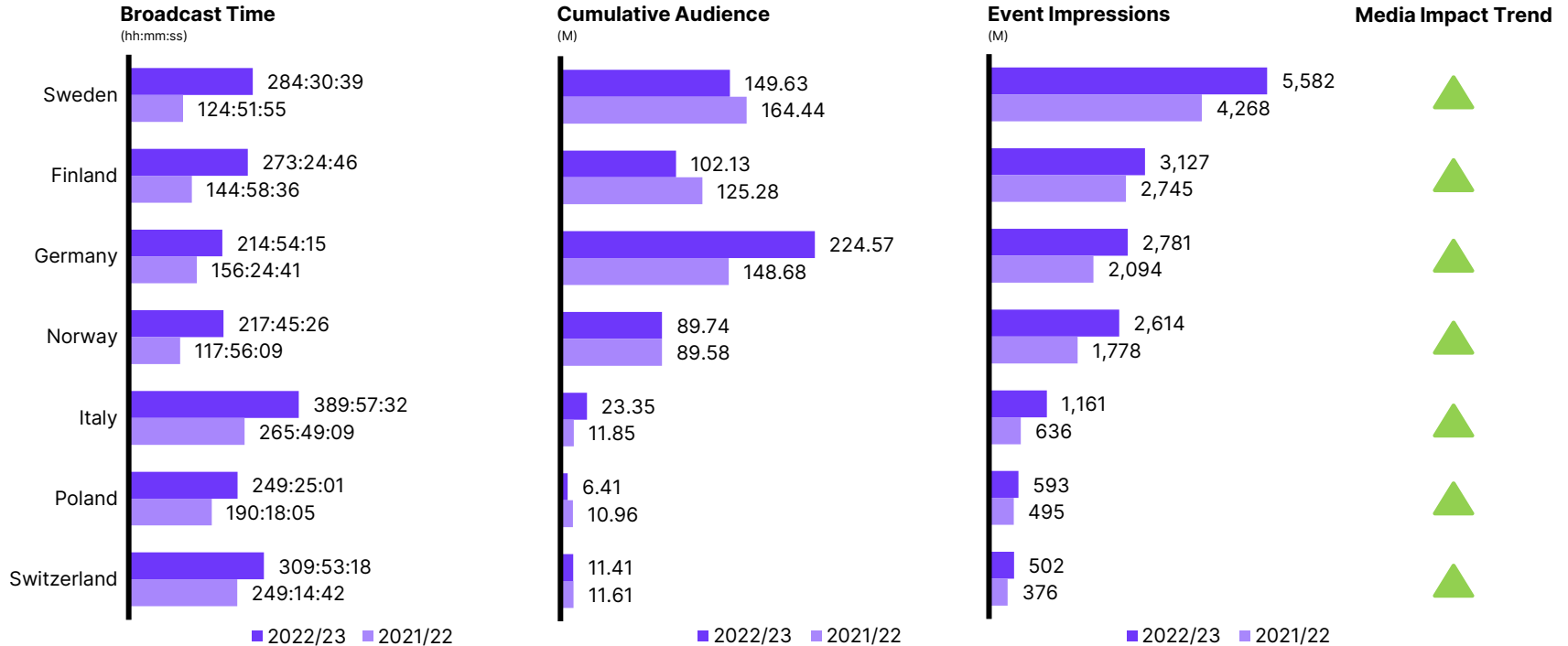
Event Impressions Trend (M)



- Although overall broadcast time increased, Eurosport's share is 3% lower than last year as Viaplay accounts for a higher share.
- Last year's second-placed channel TV6 SE took over the top position from the Russian channel Match TV and is responsible for 29% of the total media impact.
- Norwegian channel TV3 comes in third place thanks to a significant increase compared to last season (+800M).
- The German broadcasters ARD & ZDF round off the top 5, both also with an increase in event impressions (ARD: +64% / ZDF: +17%).

Media Monitoring

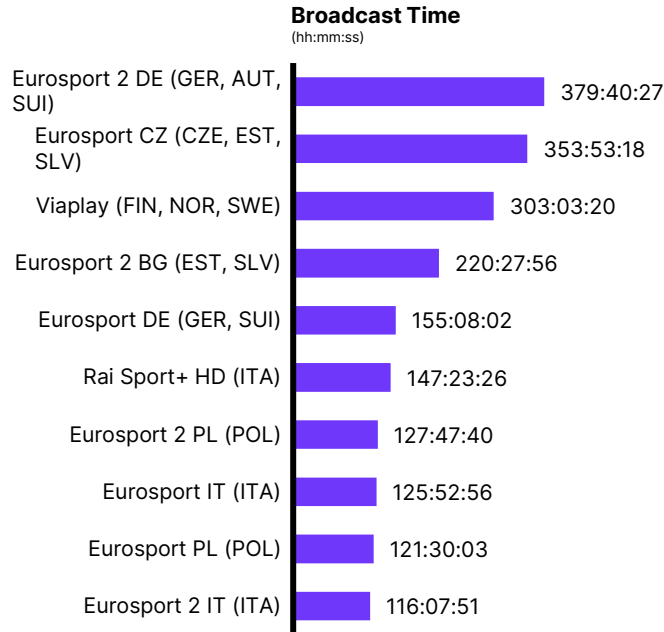
Top 7 trending countries by Event Impressions



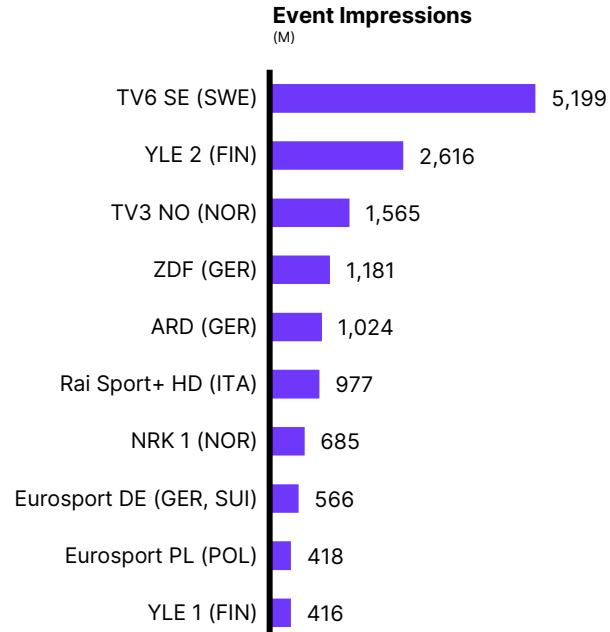
*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+ /Estimations by Nielsen Sports

Media Monitoring

Top 10 channels



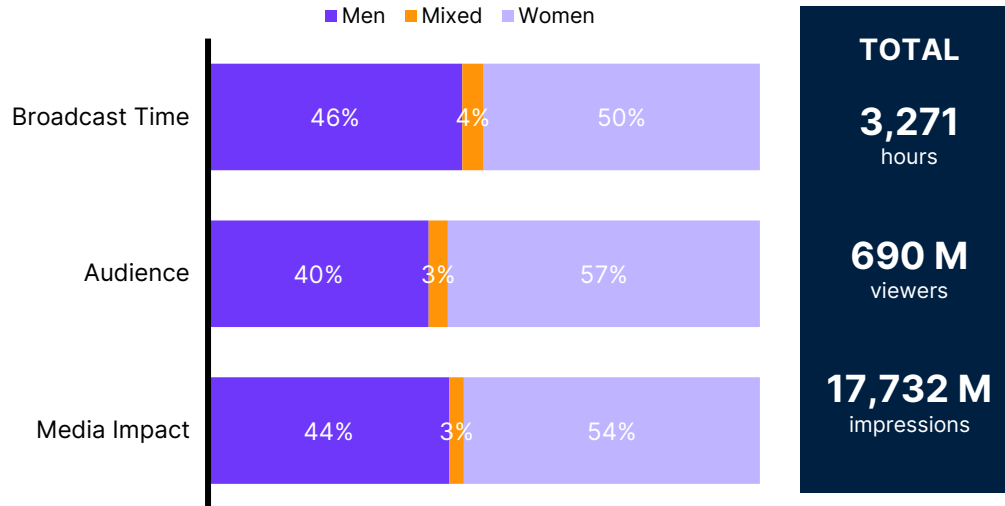
63% OF TOTAL



83% OF TOTAL

Media Monitoring

Gender comparison

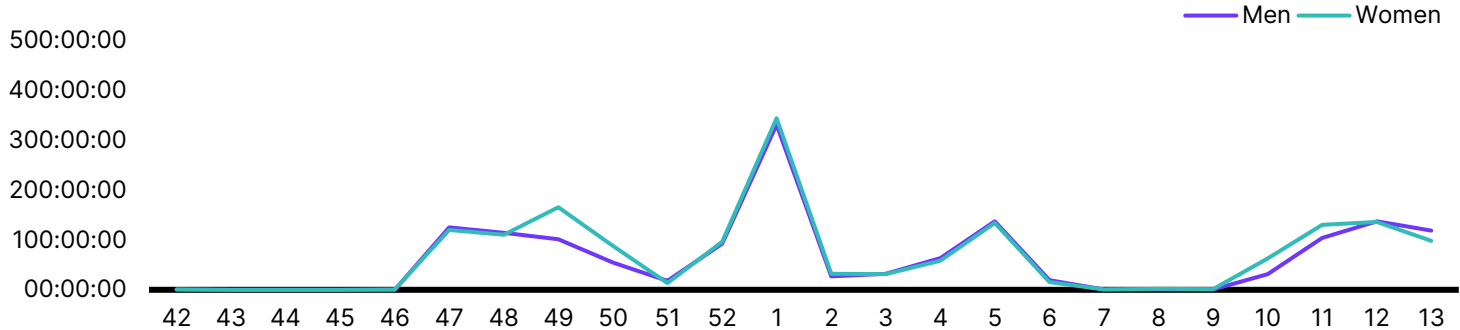


Media Monitoring

Weekly coverage trend

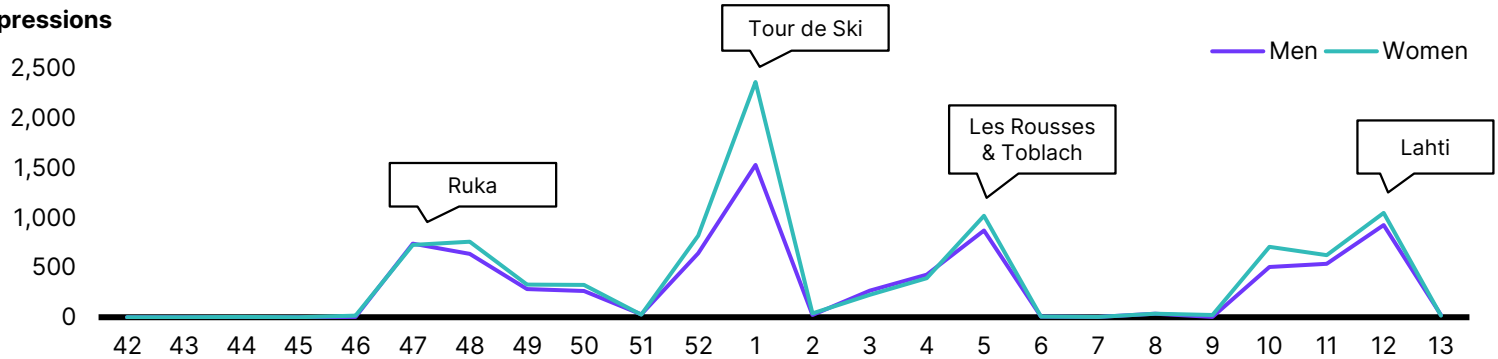
Broadcast Time

(hh:mm:ss)



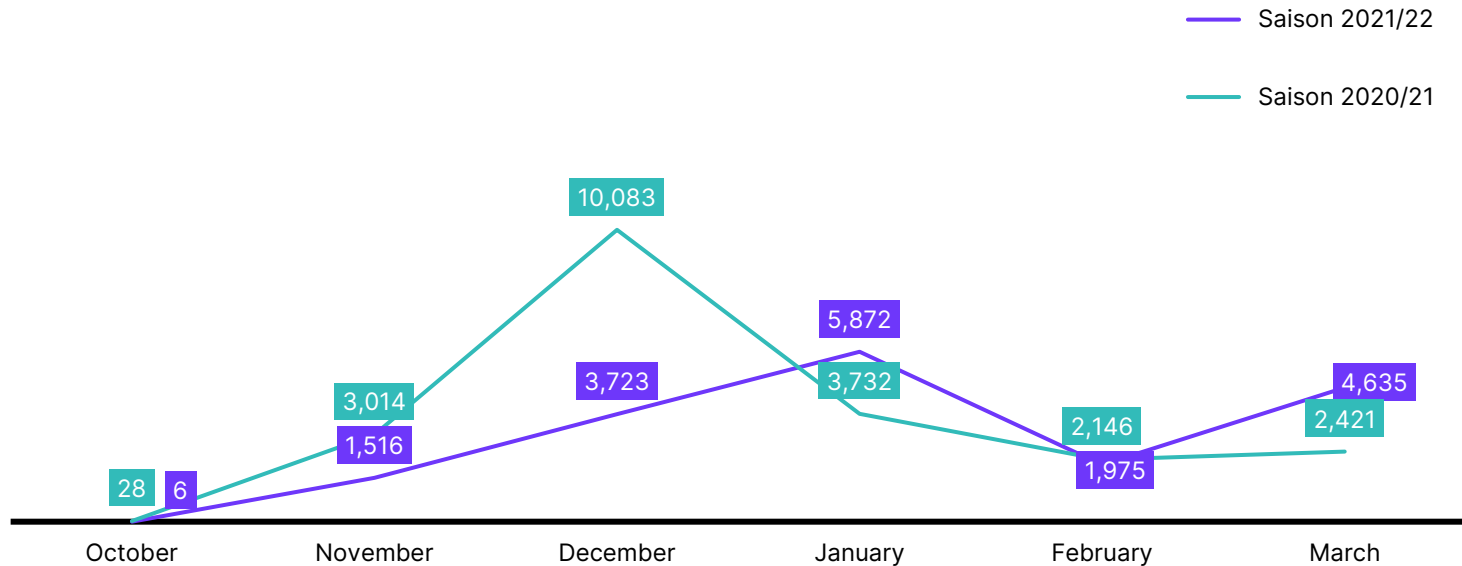
Event Impressions

(M)



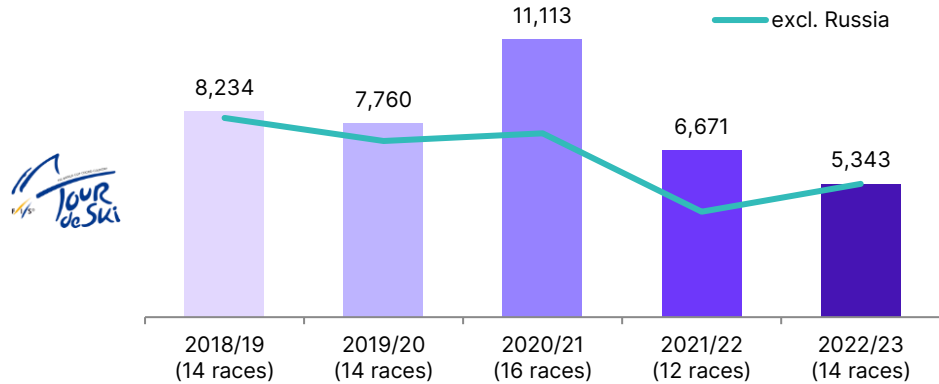
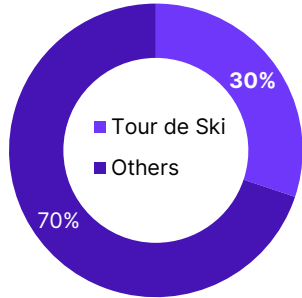
Media Monitoring

Season Comparison by Event Impressions

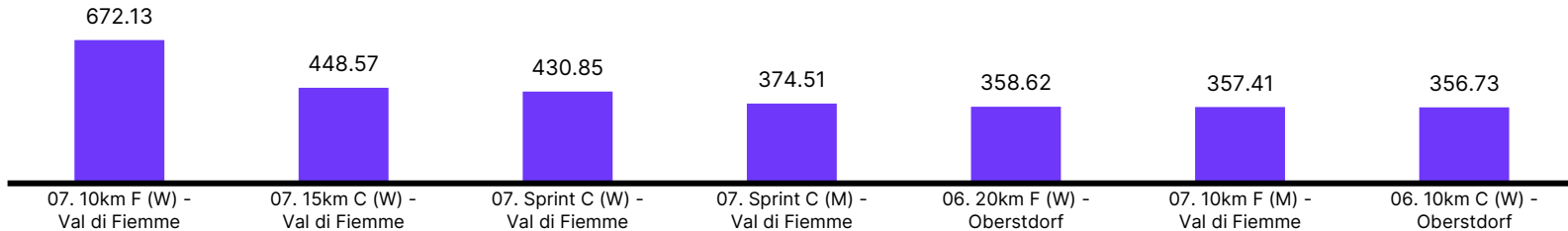


Media Monitoring

Focus Tour de Ski – Ranking by Event Impressions



Top 7 Races by Event Impressions (M)



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:

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



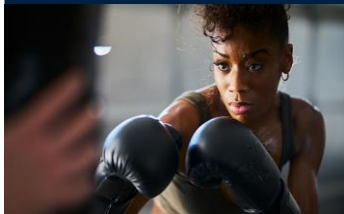
Nielsen Sports is the global leader in sports media valuation, data intelligence and research consulting.

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.

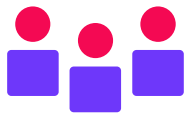
Innovative



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

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