



FIS Freestyle Ski World Cup 2022/23

TV Media Evaluation – Event Summary



Expertise by Nielsen Sports
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Introduction

Study scope

Object of investigation/event:	FIS Freestyle Ski World Cup (M/W)
Monitoring period:	2022/23 Season
Sponsors:	Swatch (only Park & Pipe World Cup)
Markets*:	Austria, Canada, China, Finland, France, Germany, Italy, Japan, Norway, 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 Due to US sanctions against Russia Nielsen has withdrawn from the market.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

FIS Freestyle Ski World Cup 2022/23 – Men & Women

	Live	Non-Live	TOTAL	TOTAL 2021/22	
FIS Freestyle Ski World Cup	Cumulative Audience* (M)	12.18	296.04	308.22	837.41
	Number of Broadcasts (#)	714	3,573	4,287	5,503
	Broadcast Time (hh:mm:ss)	703:17:38	1453:15:02	2156:32:40	2190:56:59
	Actual Playing Time (hh:mm:ss)	528:21:42	1090:59:33	1619:21:15	1746:58:01
	Event Impressions (M)	1,346.50	3,457.85	4,804.34	9,828.14
Sponsorship Evaluation	Visibility (hh:mm:ss)	42:19:23	87:56:33	130:15:56	-
	Sponsorship Impressions (M)	105.51	196.13	301.64	-
	100% Media Equivalency (€)	1,740,618	3,309,903	5,050,521	-
	QI Media Value (€)	352,794	684,519	1,037,313	-
	Average Sequence Duration (sec.)	5.1	4.9	5.0	-
	Ratio Visibility/Broadcast Time (%)	6.0	6.1	6.0	-

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

Key Insights

Cumulative Audience

decreased 63% compared to the previous season. Main drivers for the drop are China (-352M), Japan (-92M) and France (-34M).

Positive developments can be observed in Germany (+14%) and Norway (+25%).

Broadcast Time

remains overall stable across the analyzed markets. Negative trends can be observed in China (-47%) and USA (-96%). However, this is compensated by increased coverage in Norway (+161h), Sweden (+63h) and Finland (+55h).

With 668h, Ski Cross had the highest broadcast time of all disciplines. This represents a 33% increase compared to last season.

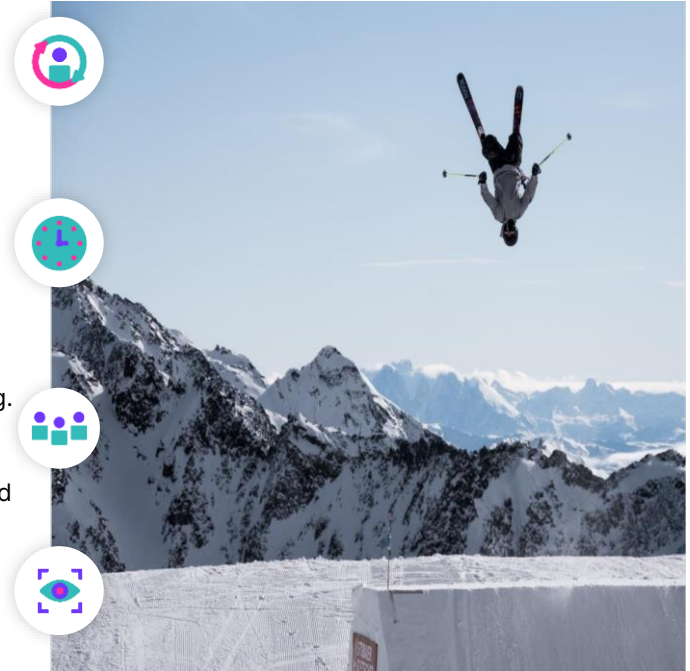
Event Impressions (Media Impact)

returned to values from 2020/21 (non-Olympic season). In 2021/22 the media impact was particularly high in China due to the excitement around the Olympic Winter Games 2022 in Beijing. Therefore, a decline was likely to occur in 2022/23. The market sees a decrease of -4,770M in terms of media impact.

Outside of China, event impressions declined by 6% - especially in Japan (-64%), USA (-43%) and France (-41%).

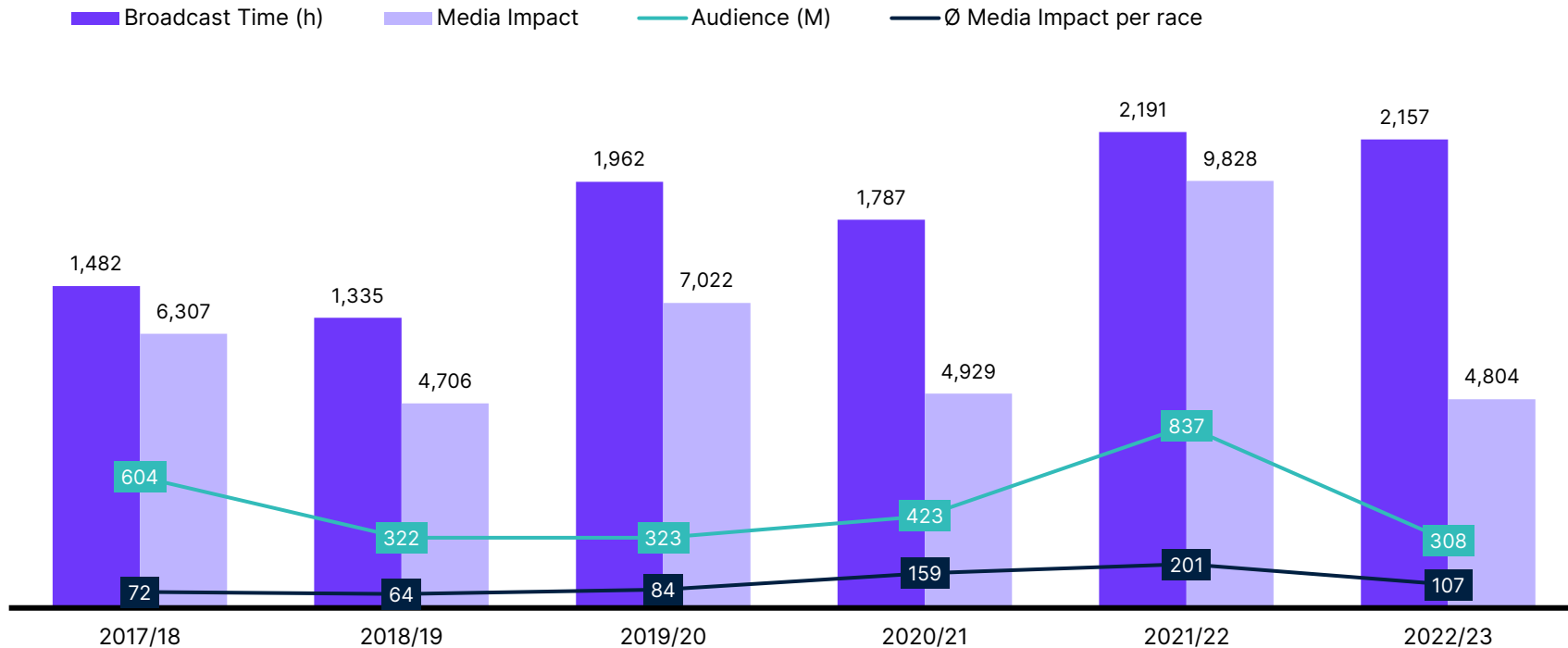
Sponsorship Visibility (Swatch @ Park & Pipe)

On Screen Graphic is the most visible advertising tool for Swatch and accounts for 70% of the 100% Media Equivalency.



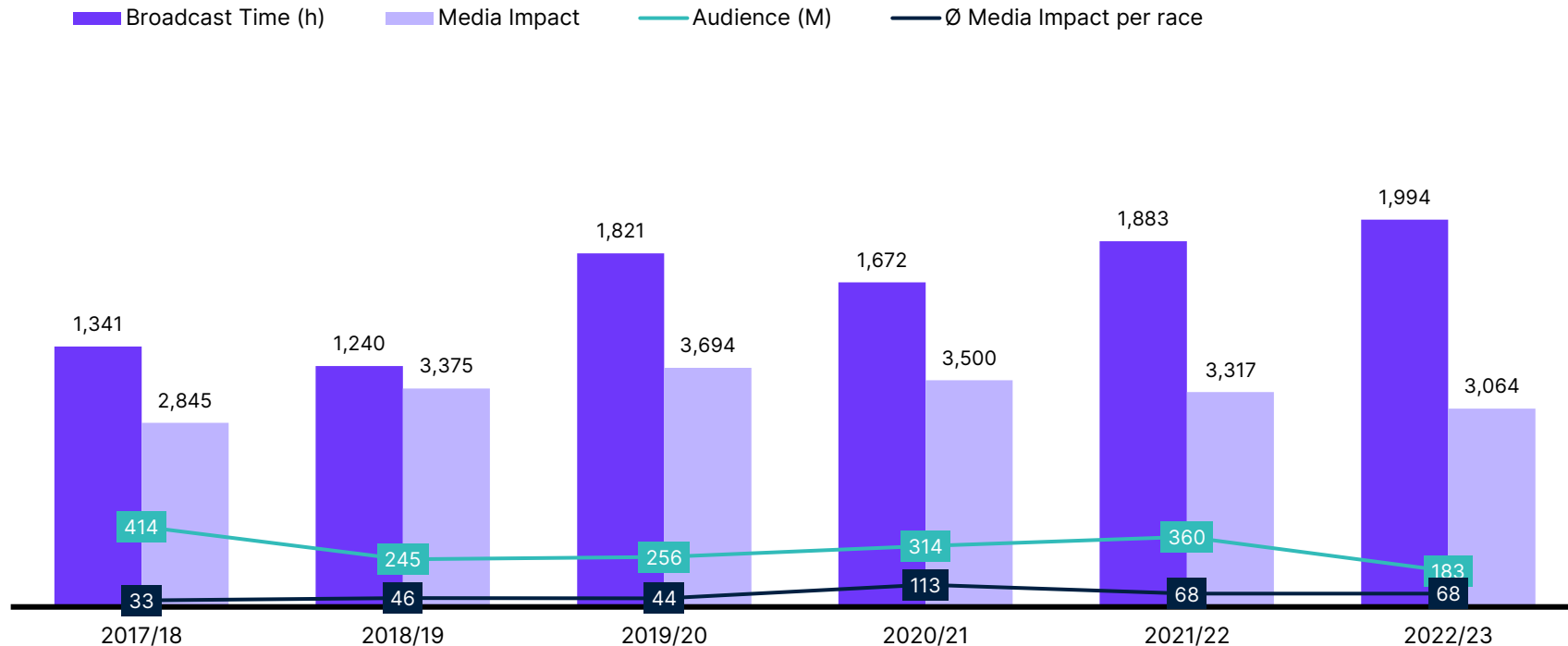
Key Insights

Year-on-year development



Key Insights

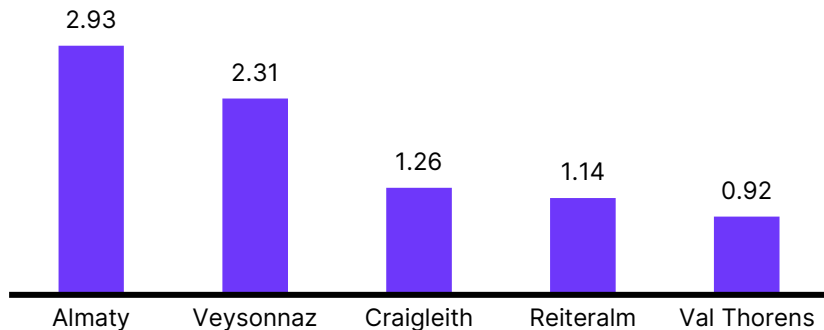
Year-on-year development (excluding China)



Management Summary

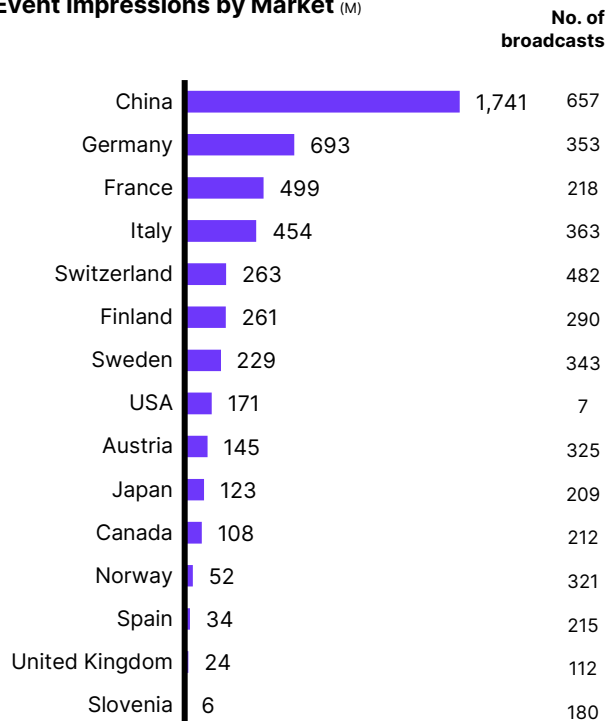
Media Monitoring

Top 5 Venues by Cumulative Live Audience* (M)



- Host of Aerials, Dual Moguls and Moguls, Almaty ranks top in terms of live audience thanks to coverage on major public broadcasters, e.g. CCTV (CHN) and SRF (SUI).
- From second to fifth place (Veysonnaz, Craigleith, Reiteralm and Val Thorens), the venues all hosted exclusively Ski Cross competitions.
- Like last season, live audience is comparably low across all venues since the majority of coverage in China and Germany was delayed or relive.
- China accounts for 36 % of total media impact. Halfpipe competitions proved to be most popular, accounting for 38% of media impact in China – followed by Aerials (22%) and Slopestyle (20%).

Event Impressions by Market (M)

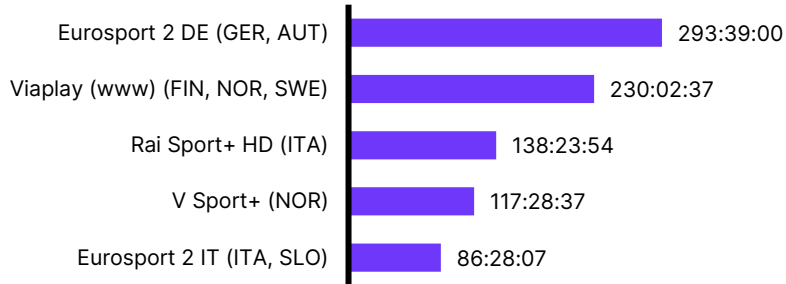


*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+ /Estimations by Nielsen Sports

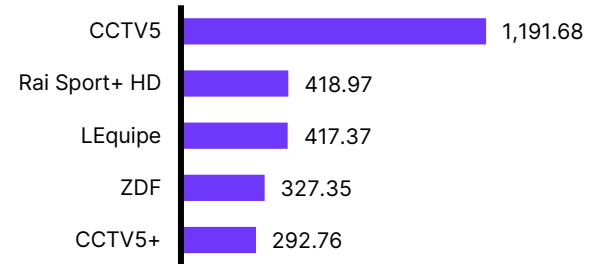
Management Summary

Media Monitoring

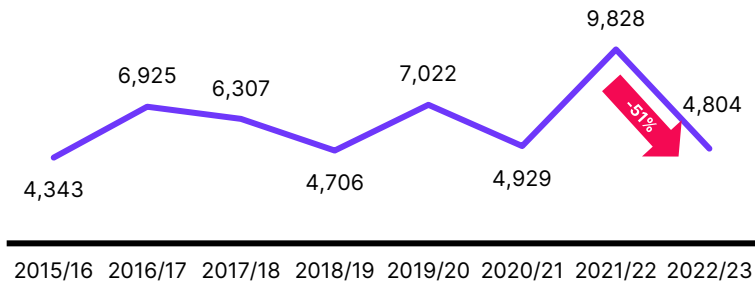
Top 5 Channels by Broadcast Time (hh:mm:ss)



Top 5 Channels by Event Impressions (M)



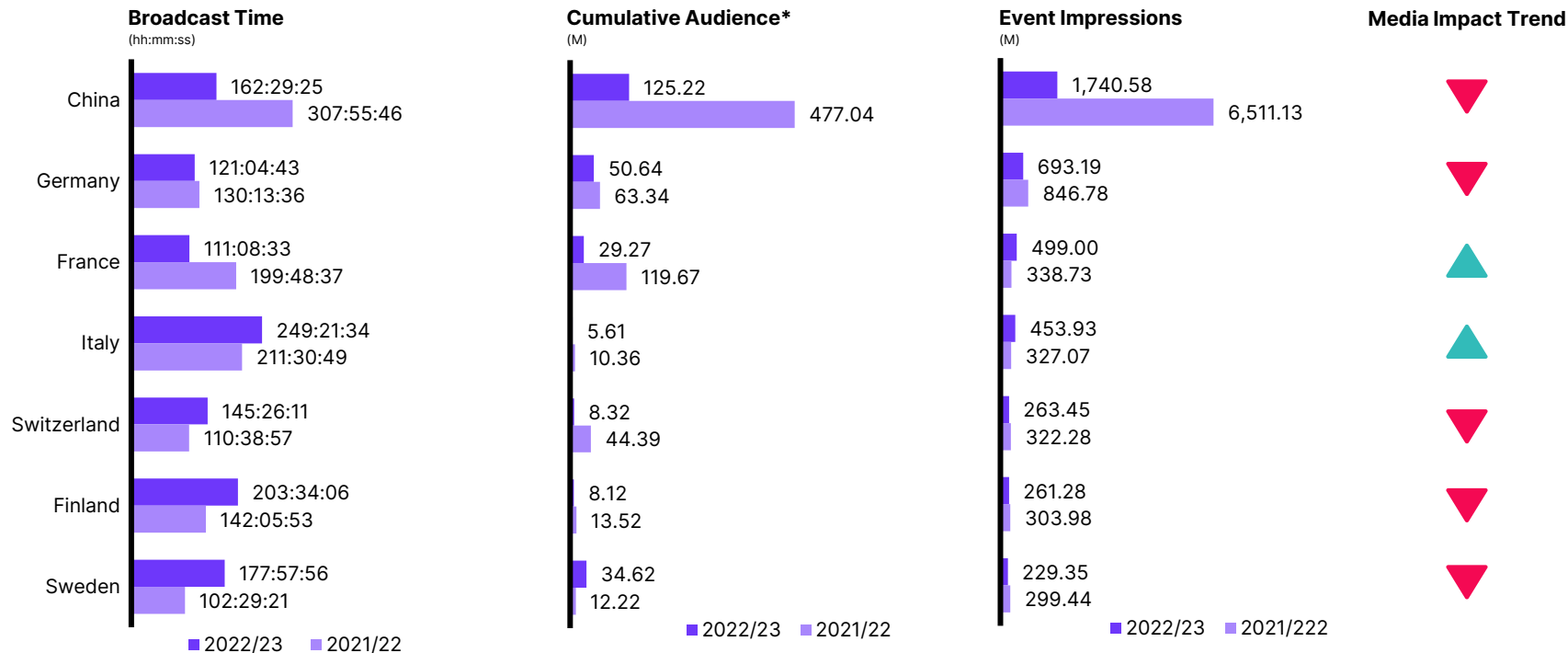
World Cup Event Impressions Trend (M)



- Overall coverage on Eurosport channels remains nearly stable compared to last season despite increased coverage on Viaplay.
- The broadcaster accounts for 44% of the total coverage (45% last season).
- The channel ranking by media impact continues to be led by the Chinese channel CCTV5, which is responsible for 25% of the media impact. Nevertheless, the media impact for CCTV5 declined by 70%.
- Rai Sport+ HD jumps into second place thanks to an increase of almost 140M event impressions.

Media Monitoring

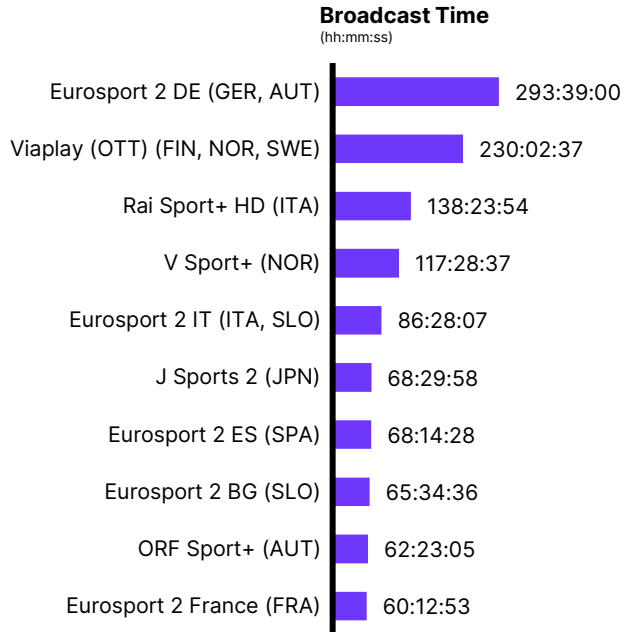
Top 7 trending countries by Event Impressions 2022/23



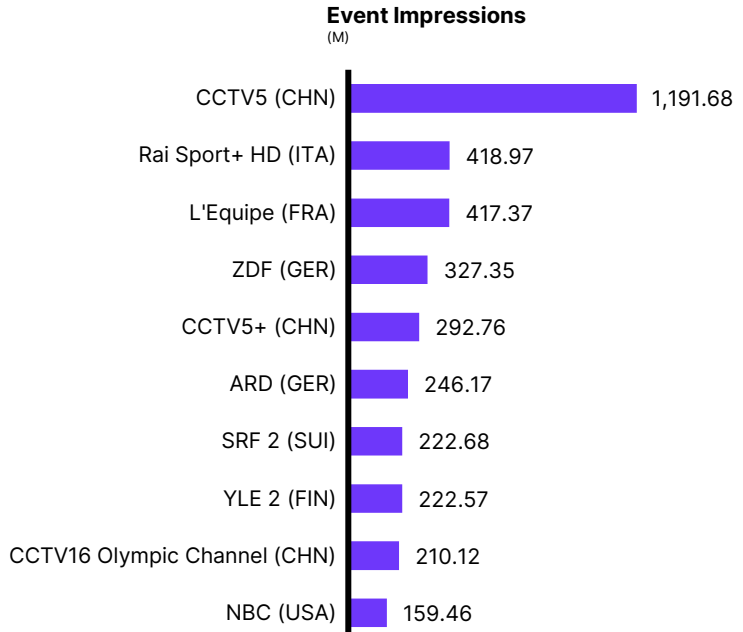
*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+ /Estimations by Nielsen Sports

Media Monitoring

Top 10 channels



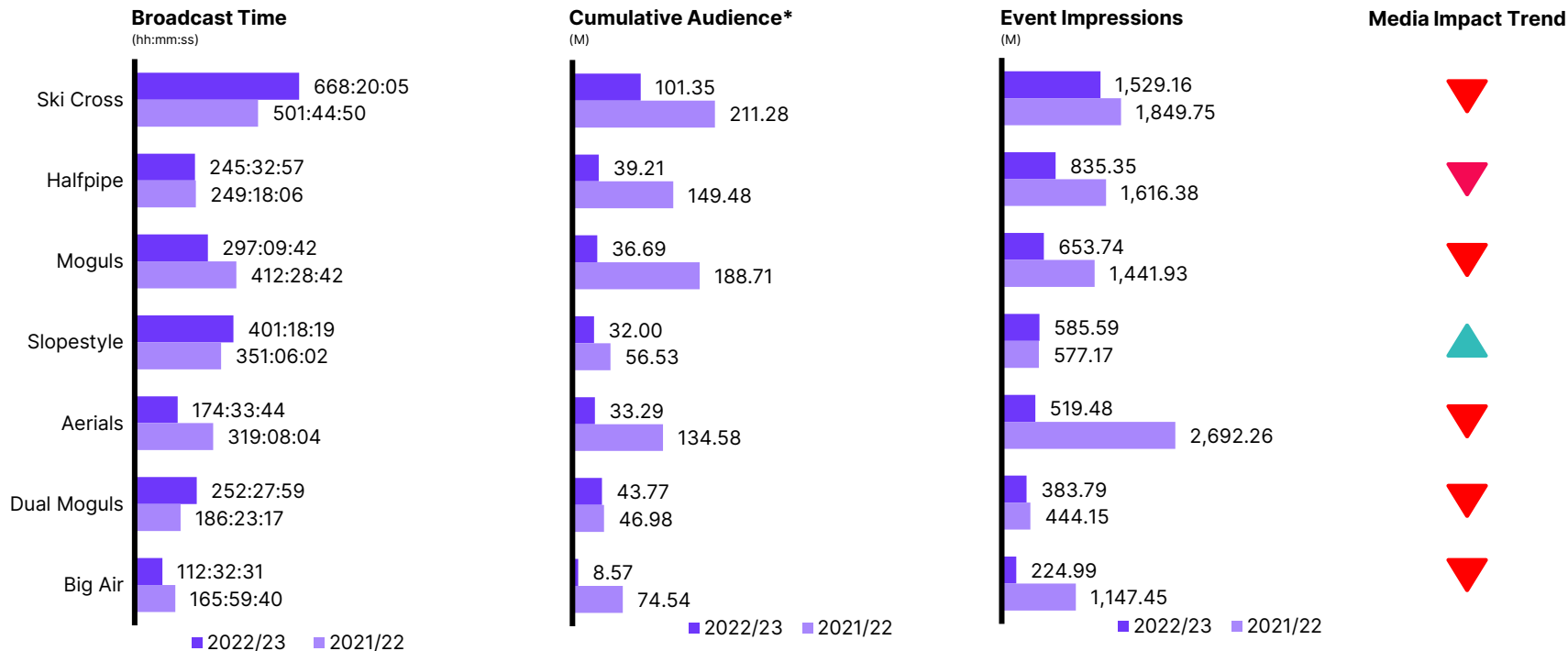
55% OF TOTAL



77% OF TOTAL

Media Monitoring

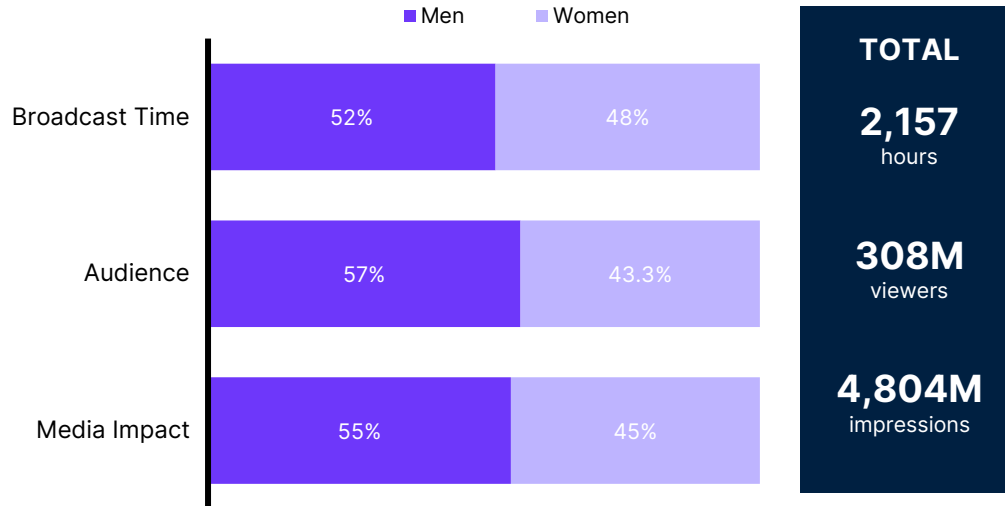
Discipline YOY (ranked by event impressions 2022/23)



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

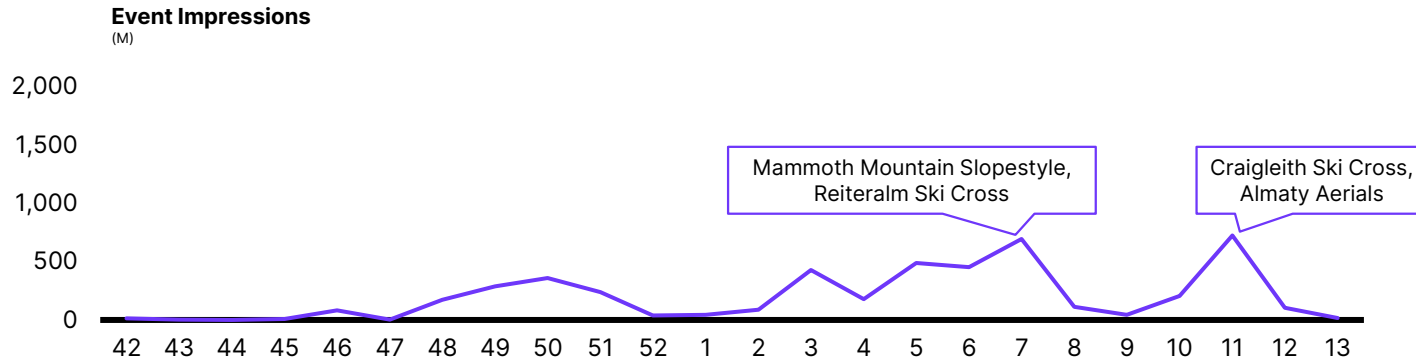
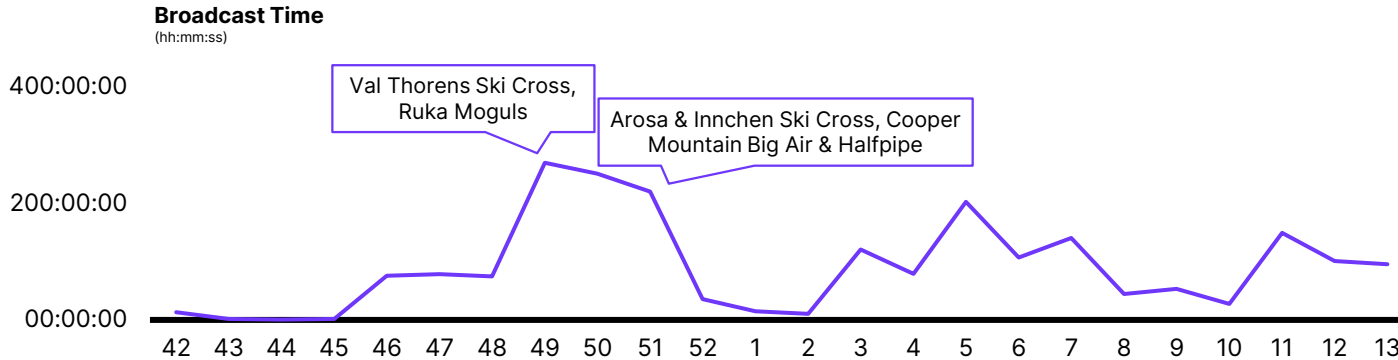
Media Monitoring

Gender comparison



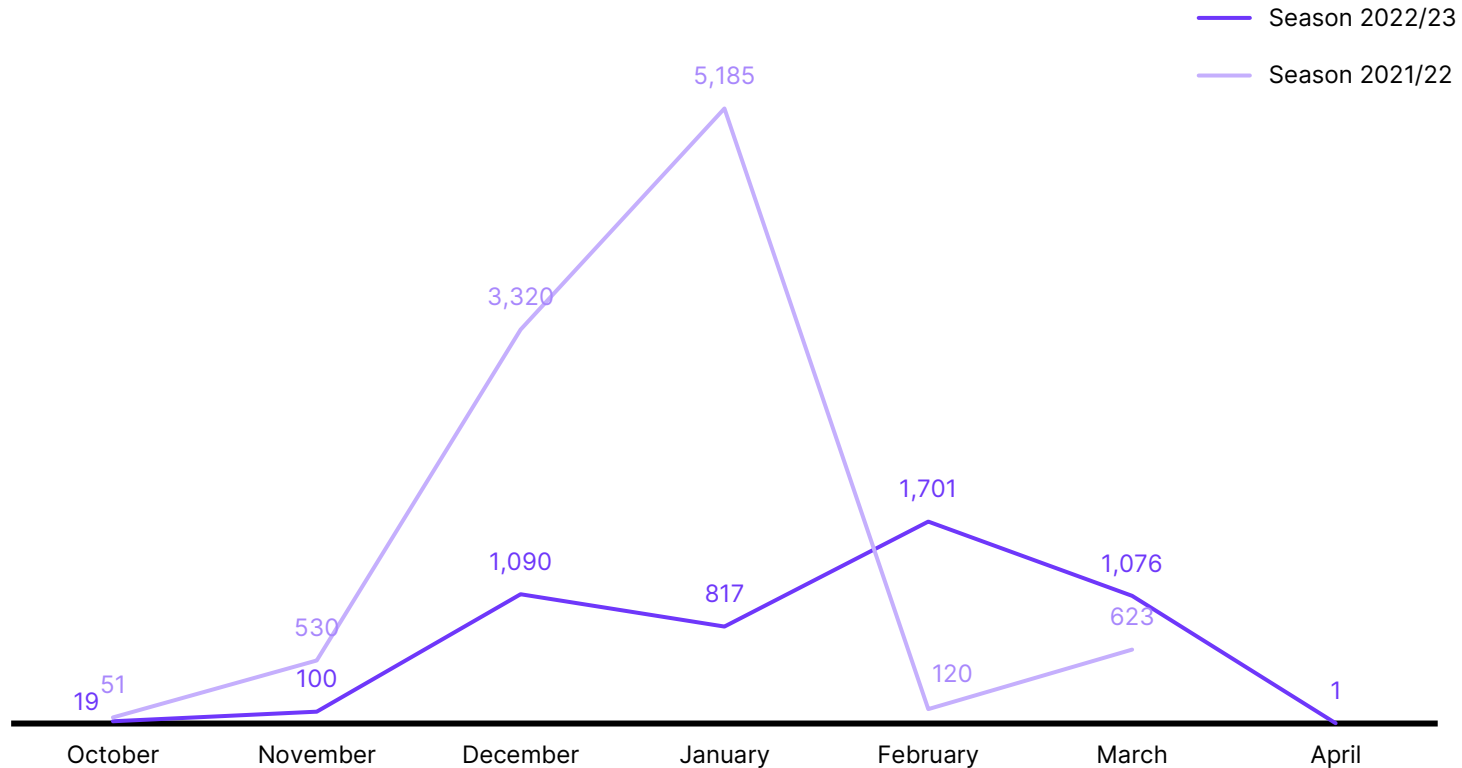
Media Monitoring

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:

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



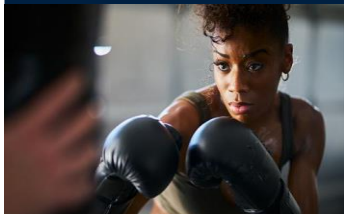
Nielsen Sports is the global leader in sports media valuation, data intelligence and research consulting.

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

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