



Viessmann FIS Ski Jumping World Cup Men 2022/23

TV Media Evaluation – Event Summary



Expertise by Nielsen Sports
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Introduction

Study scope

Object of investigation/event:	Viessmann FIS Ski Jumping World Cup (Men)
Monitoring period:	2022/23 Season
Sponsors:	Bergstern, FIS App, Viessmann
Markets*:	Austria, China, Croatia, Czech Republic, Denmark, Finland, France, Germany, Italy, Japan, Netherlands, Norway, Poland, Romania, Slovakia, Slovenia, Sweden, 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 Due to US sanctions against Russia Nielsen has withdrawn from the market.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 Ski Jumping World Cup 2022/23

		Live	Non-Live	TOTAL	TOTAL 2021/22
FIS Ski Jumping WC	Cumulative Audience* (M)	370.26	1,232.17	1,602.42	1,976.93
	Number of Broadcasts (#)	2,080	6,807	8,887	9,928
	Broadcast Time (hh:mm:ss)	2135:30:26	4229:05:59	6364:36:25	6092:57:50
	Actual Playing Time (hh:mm:ss)	1762:09:31	3331:30:51	5093:40:22	4897:41:25
	Event Impressions (M)	47,508.22	10,457.10	57,965.32	65,319.95
Sponsorship Evaluation	Visibility (hh:mm:ss)	808:16:59	1711:03:45	2519:20:44	3628:20:26
	Sponsorship Impressions (M)	17,900.38	1,870.72	19,771.10	34,970.71
	100% Media Equivalency (€)	117,244,883	23,649,458	140,894,341	249,286,794
	QI Media Value (€)	25,587,680	5,474,414	31,062,095	54,383,833
	Average Sequence Duration (sec.)	4.31	4.31	4.31	4.49
	Ratio Visibility/Broadcast Time (%)	37.85	40.46	39.58	59.5

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

Key Insights

- Overall media impact declines by 11% – exclusion of Russia as a main factor accounts for 59% of this loss
- Poland overtakes Germany and becomes the top market in terms of media impact
- Slovenia and Norway belong to the top markets with a positive media impact trend

Cumulative Audience

declines by 19% compared to the previous season (-375M). Germany (-184M) and Japan (-135M) see the biggest drop while especially Poland shows a positive trend (+50M).

Cumulative live audience declined from 426M to 370M (-13%).

The 4HT opener in Oberstdorf shows an especially positive trend (+34%).

Broadcast Time

increases by 272h (+4%) mainly due to more coverage on Viaplay (+133h). All Eurosport channels together account for 72% of total coverage this season, compared to 75% in the previous season.

Austria, Italy and Norway are markets with a positive trend in terms of broadcast time.

Event Impressions (Media Impact)

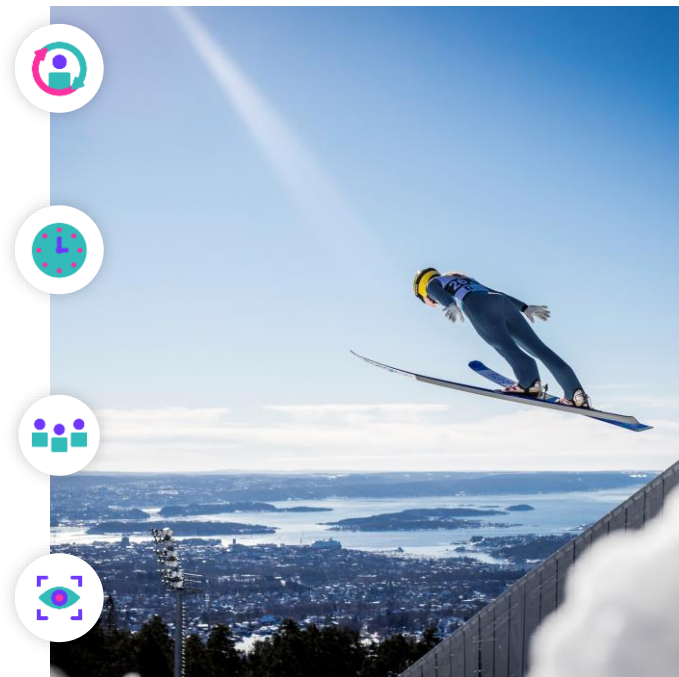
decline by 11% compared to 2021/22. In addition to the drop in Germany, Russia (6% of the media impact in 2021/22) had to be excluded from the analysis.

In Norway (+31%) and Poland (+15%), the sportive success of local heroes such as Halvor Egner Granerud led to an increase in media impact.

Sponsorship Visibility

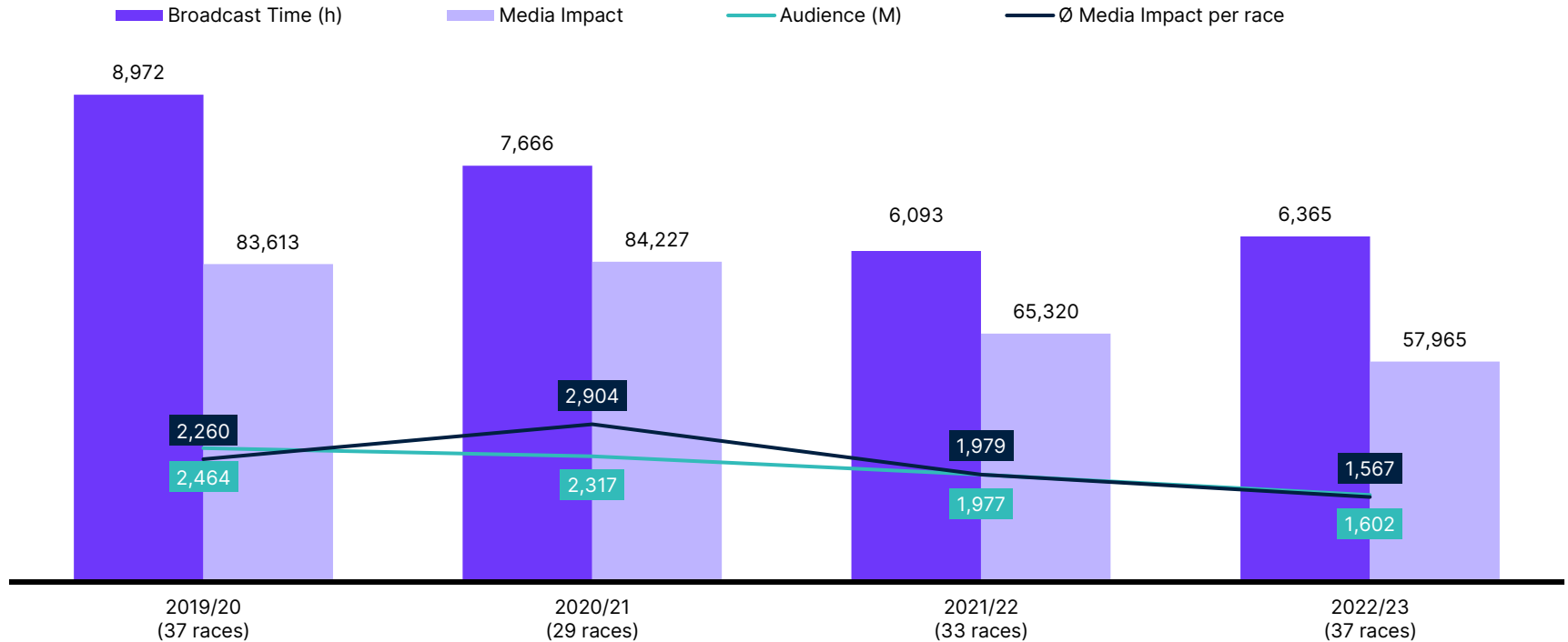
The Start Backdrop remains the most visible tool for the FIS partners Viessmann and Bergstern. With a total exposure time of 1,092h, it accounts for 43% of all advertising tools.

It is followed by the Viessmann's Platinum Circle with a visibility of 507h which equals to 20% of the total visibility.



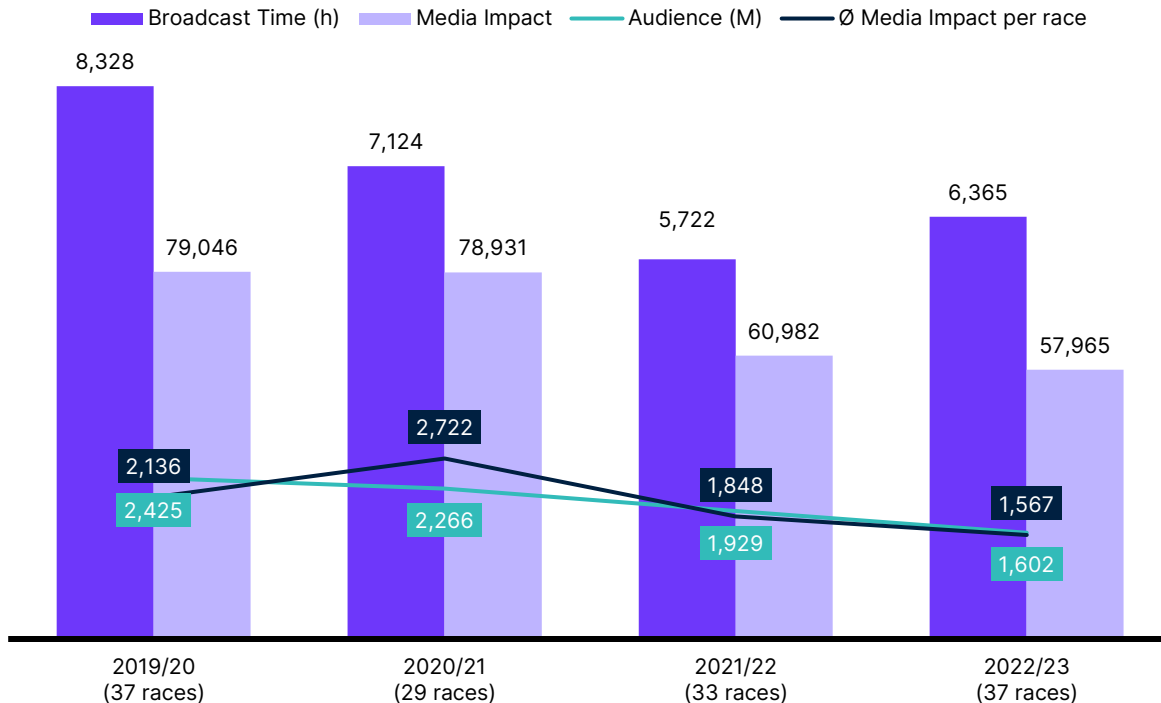
Key Insights

Year-on-year development



Key Insights

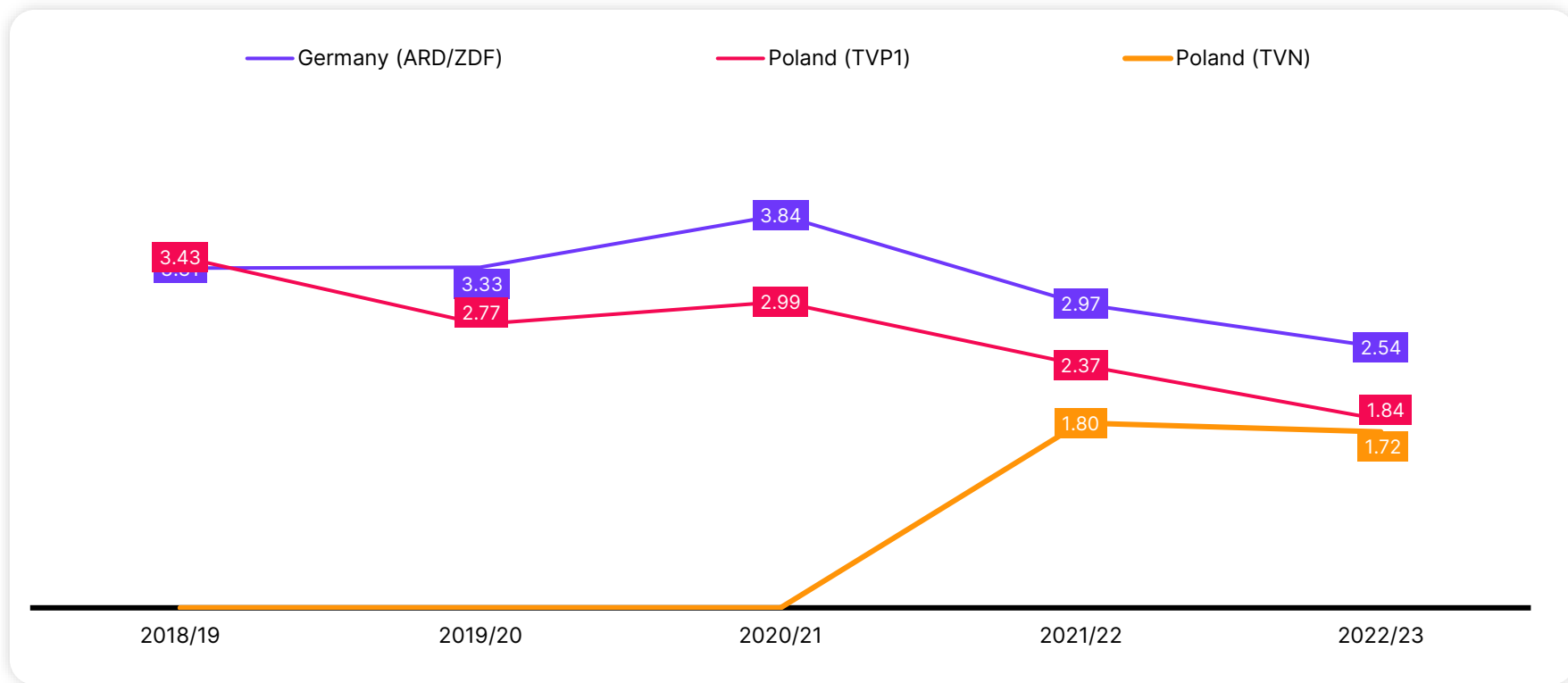
Year-on-year development (excl. Russia)



- Removing Russia from the year-on-year comparison, the decline in event impressions is only 5%.
- In the 2021/22 season, Russia was responsible for 6% of the total event impressions, making it the third most important country behind Germany and Poland.
- Looking at the audience, the decline without Russia is still 17% compared to last season mainly driven by less news and magazine features in Germany (-207M) and Japan (-135M).
- With four more competitions being held in 2022/23, the media impact per competition is around 15% lower than last year.

Management Summary

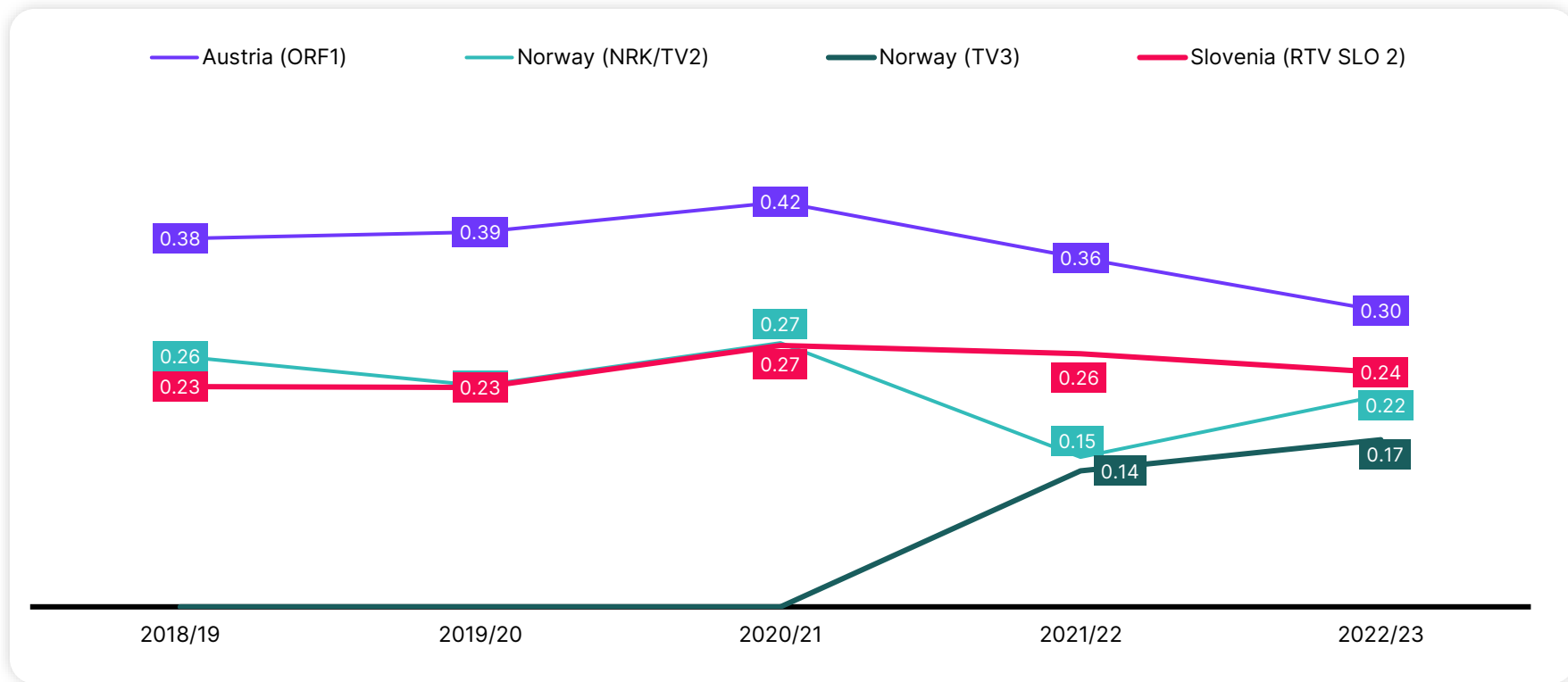
Short Aside: Development of average audience* per live airing (M) in core markets (1/2)



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

Management Summary

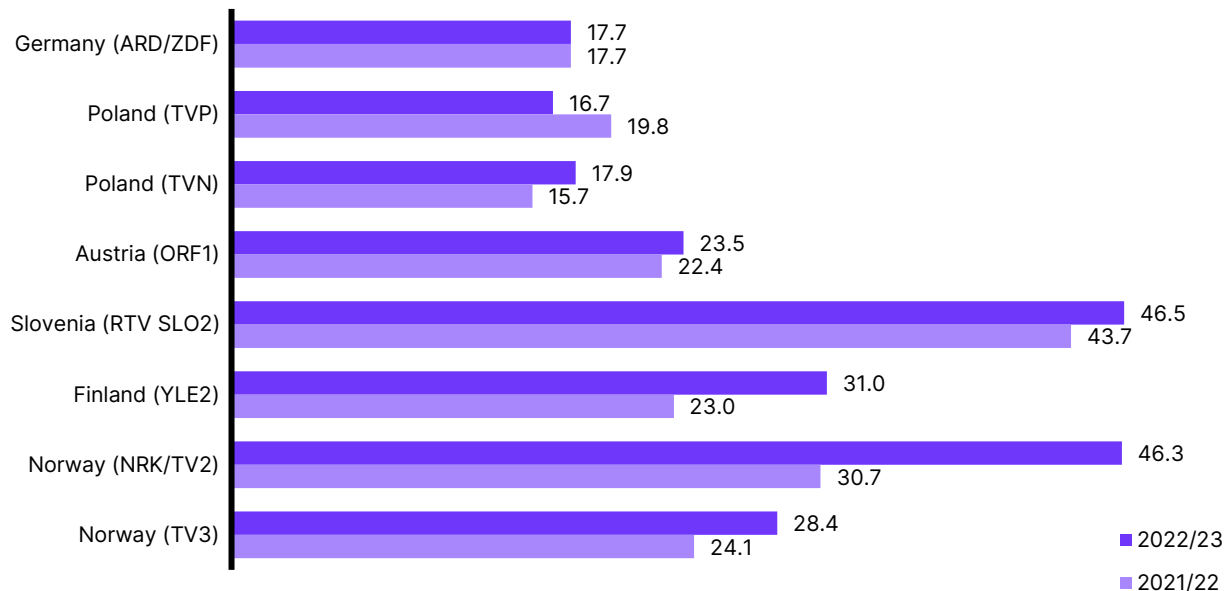
Short Aside: Development of average audience* per live airing (M) in core markets (2/2)



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

Management Summary

Short Aside: YOY comparison of average market shares* per live airing (%) in core markets



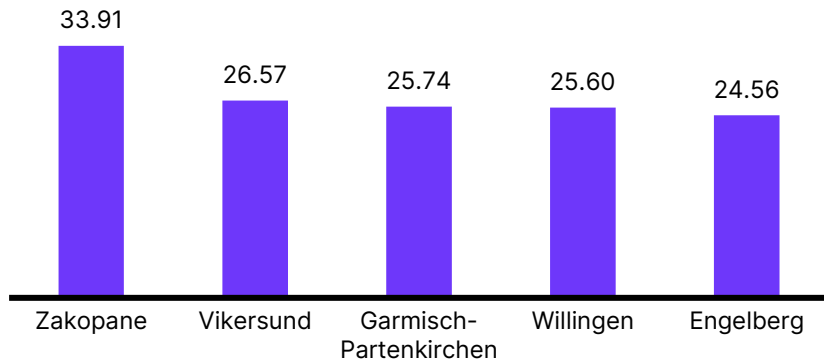
In Germany, avg. live market share remains stable despite lower live audience (-14%). In Austria, market share even increases despite lower audience.
→ Ski Jumping still enjoys a high level of interest among those watching TV – but fewer people were watching TV.

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

Management Summary

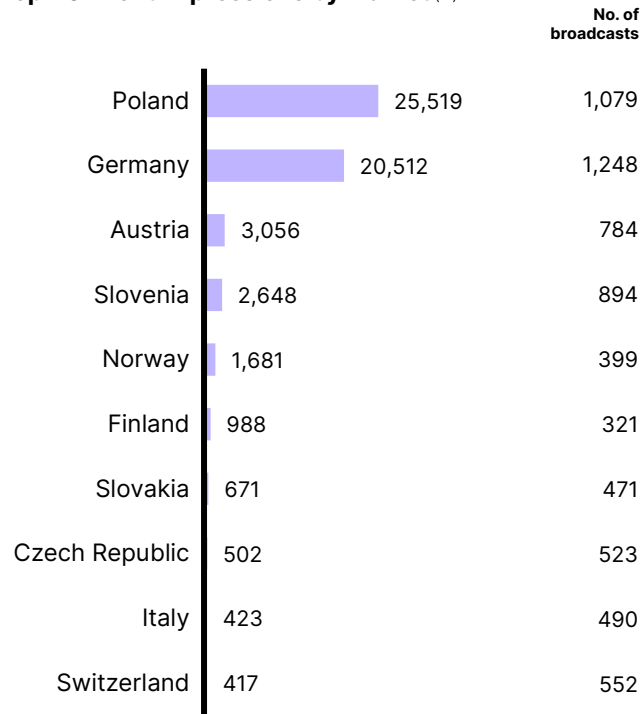
Media Monitoring

Top 5 Venues by Cumulative Live Audience (M)



- Of the Four Hills Tournament events, only Garmisch-Partenkirchen managed to make it into the top 5 in terms of live audience. The average of all World Cup events is 19.4M compared to 23.2M in the last season.
- For Zakopane, public broadcasters ARD (14M) and TVP1 (7M) account for 62% of the 34M – quite equally spread between the individual and the team competition.
- In the country ranking by media impact, Poland regains the top position from Germany.
- Russia, last year's third-placed country, had to be excluded from the analysis. Austria is now in third place, followed by Slovenia and Norway.

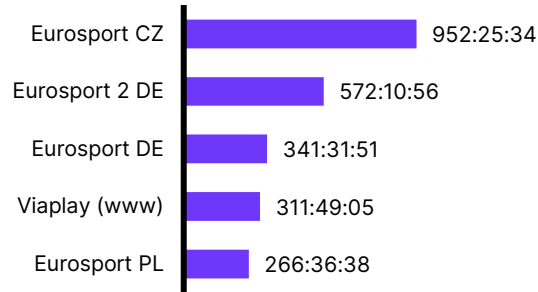
Top-10 Event Impressions by Market (M)



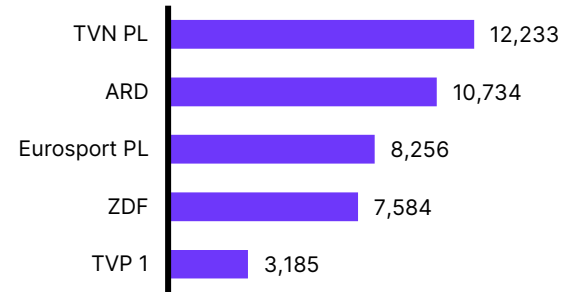
Management Summary

Media Monitoring

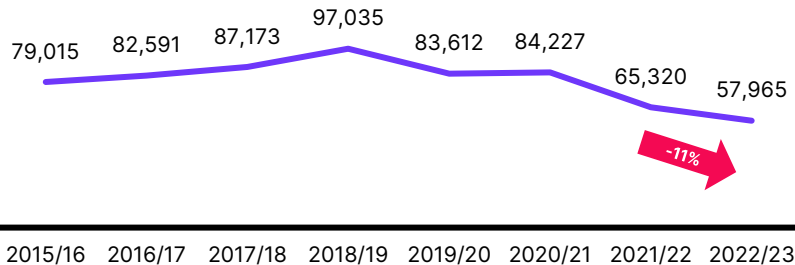
Top 5 Channels by Broadcast Time (hh:mm:ss)



Top 5 Channels by Event Impressions (M)



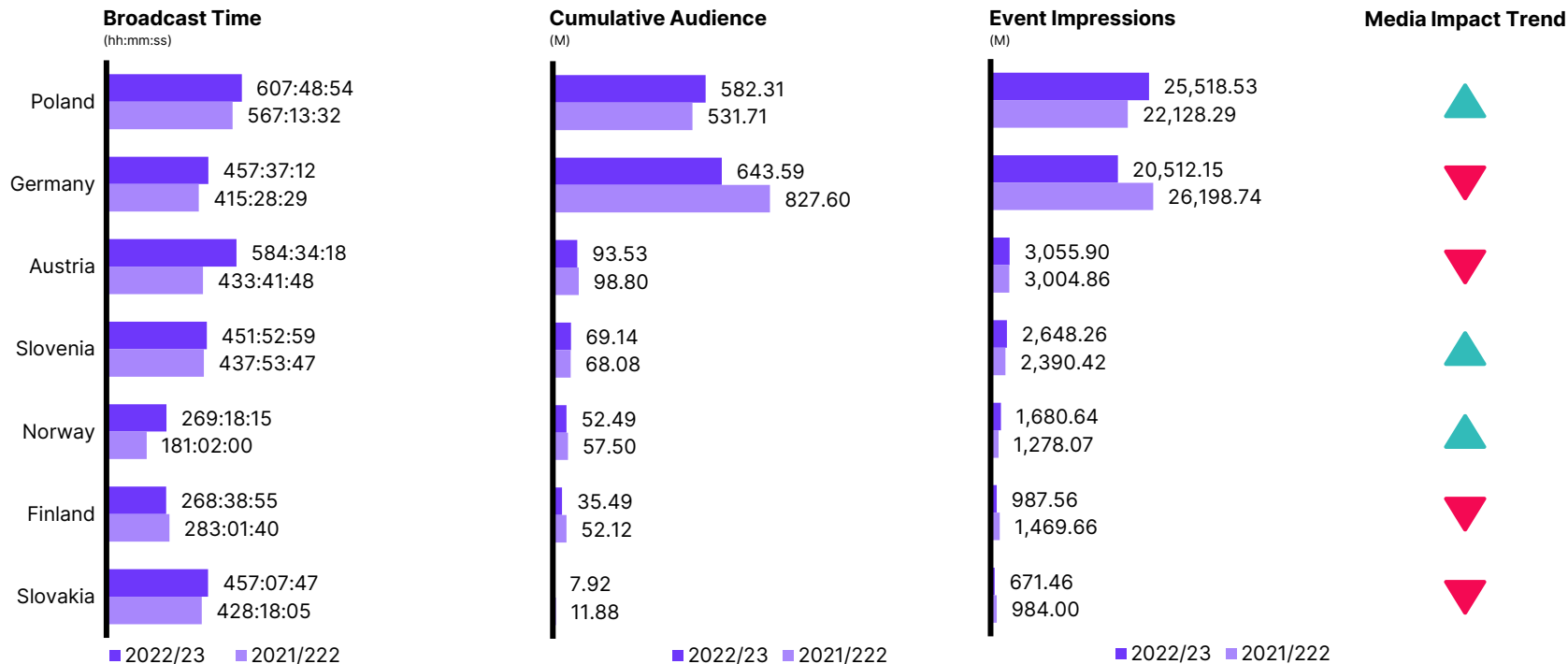
World Cup Event Impressions Trend (M)



- Overall, 16 of the top 20 channels by broadcast time are Eurosport channels.
- Eurosport was responsible for a total broadcast time of almost 4,600 hours. This corresponds to a share of 72%.
- The top 5 channels in terms of event impressions account for 42bn impressions which is around to 72% of the total media impact.
- While ARD (-20%) and ZDF (-25%) each achieve significantly less media impact, Eurosport PL and TVN PL show a positive trend. After the removal of Eurosport RU, TVP1 lands in the Top 5 channels for the first time.

Media Monitoring

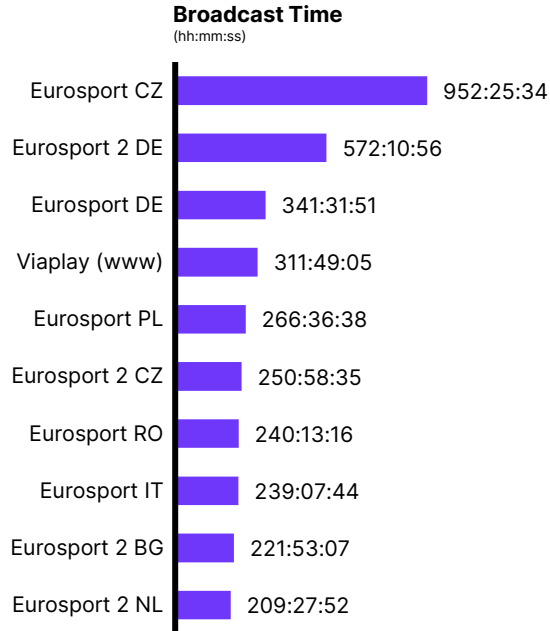
Top 7 trending countries by Event Impressions



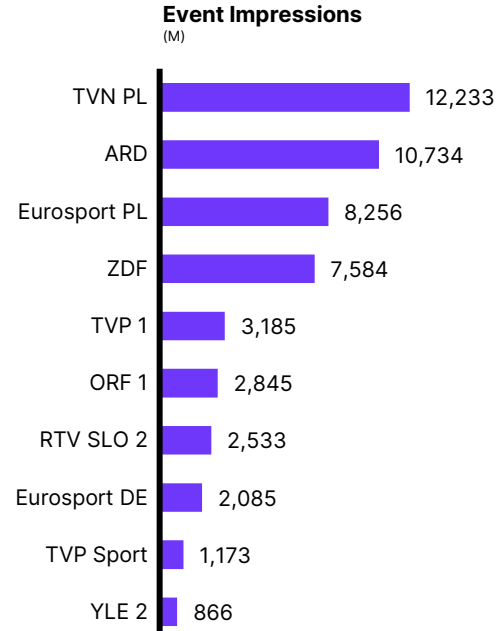
*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+ /Estimations by Nielsen Sports

Media Monitoring

Top 10 channels



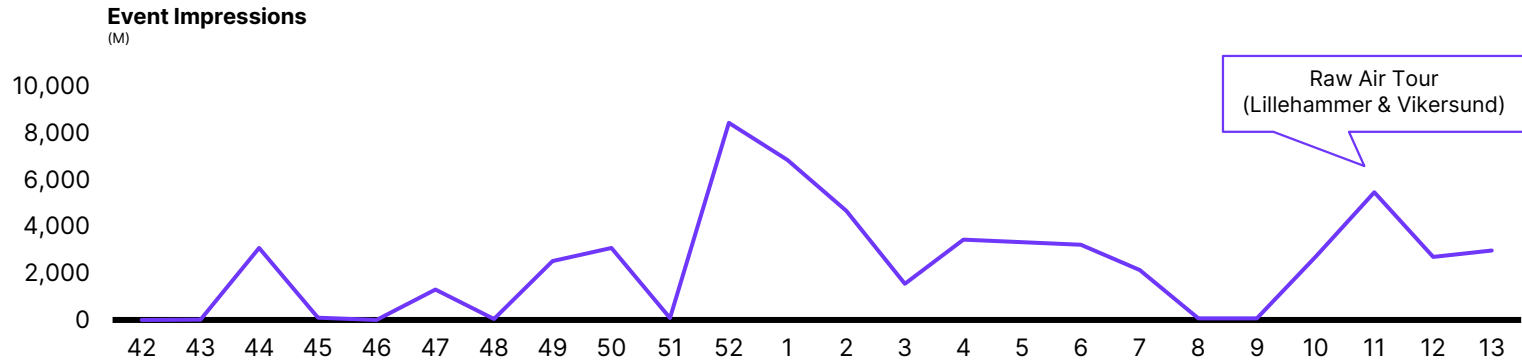
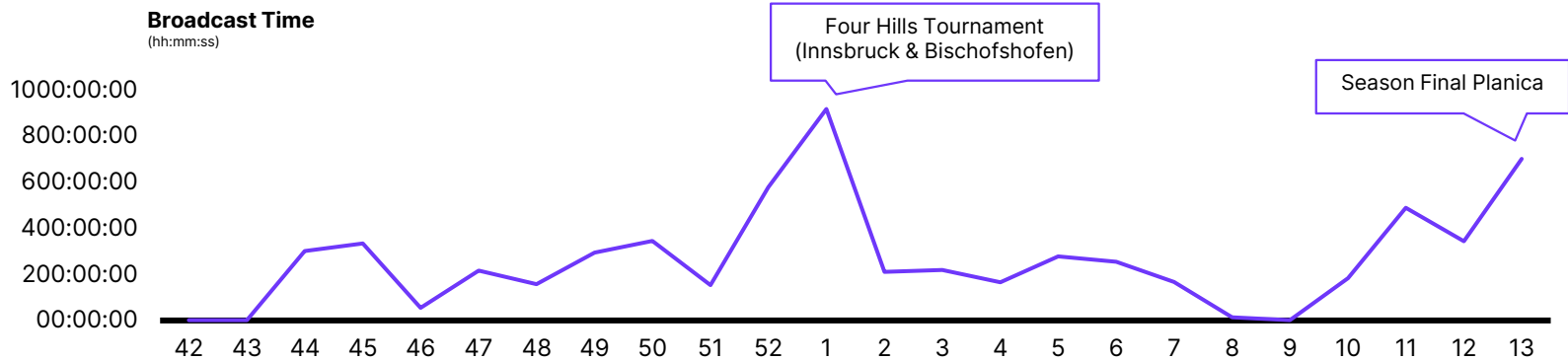
57% OF TOTAL



89% OF TOTAL

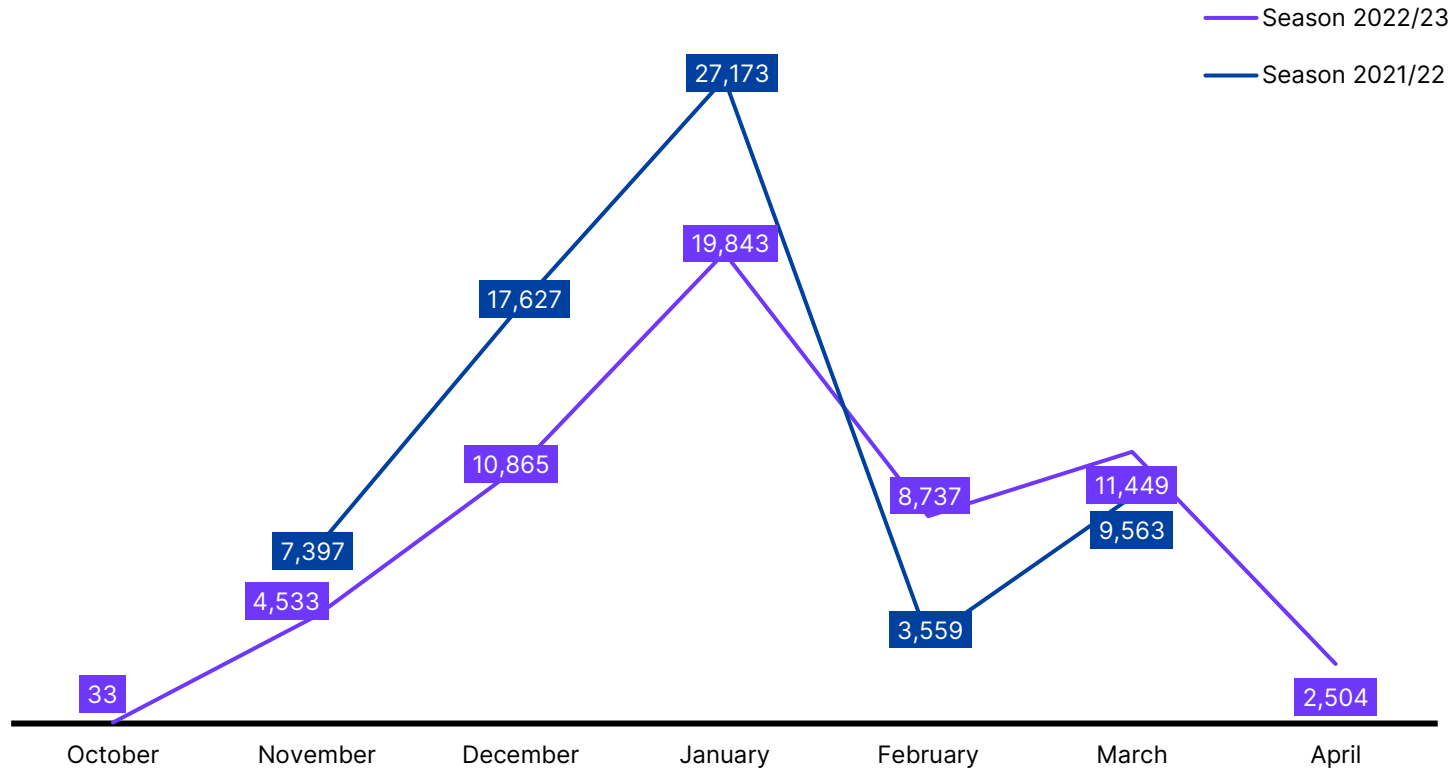
Media Monitoring

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.

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:

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



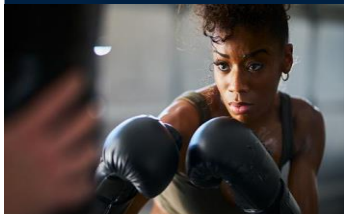
Nielsen Sports is the global leader in sports media valuation, data intelligence and research consulting.

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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