



Viessmann FIS Ski Jumping World Cup Women 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 (Women + Mixed) |
| Monitoring period: | 2022-23 Season |
| Sponsors: | Viessmann, Bergstern, FIS App |
| 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 Due to US sanctions against Russia Nielsen has withdrawn from the market.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 – Women & Mixed

| | Live | Non-Live | TOTAL | TOTAL 2021/22 | |
|------------------------|--|------------|------------|---------------|------------|
| FIS Ski Jumping WC | Cumulative Audience* (M) | 72,44 | 535,93 | 608.37 | 407.63 |
| | Number of Broadcasts (#) | 993 | 2.531 | 3,524 | 2,151 |
| | Broadcast Time (hh:mm:ss) | 904:27:07 | 1188:16:07 | 2092:43:14 | 1015:50:58 |
| | Actual Playing Time (hh:mm:ss) | 709:52:38 | 898:10:05 | 1608:02:43 | 880:38:32 |
| | Event Impressions (M) | 7.095,44 | 3.433,96 | 10,529.40 | 7,126.75 |
| Sponsorship Evaluation | Visibility (hh:mm:ss) | 328:52:30 | 454:55:31 | 783:48:01 | 596:19:12 |
| | Sponsorship Impressions (M) | 2,667 | 892 | 3,559 | 3,479 |
| | 100% Media Equivalency (€) | 27,414,434 | 8,864,732 | 36,279,166 | 33,315,361 |
| | QI Media Value (€) | 6,060,296 | 2,043,943 | 8,104,239 | 7,154,753 |
| | Average Sequence Duration (sec.) | 5.05 | 4.92 | 4.97 | 5.33 |
| | Ratio Visibility/Broadcast Time (%) | 36.4 | 38.3 | 37.5 | 58.7 |

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

Global Overview

FIS Ski Jumping World Cup 2022/23 – Women

| | Live | Non-Live | TOTAL | TOTAL 2021/22 | |
|------------------------|--|------------|-----------|---------------|------------|
| FIS Ski Jumping WC | Cumulative Audience* (M) | 64.72 | 487.59 | 552.31 | 356.55 |
| | Number of Broadcasts (#) | 923 | 2,129 | 3,052 | 1,902 |
| | Broadcast Time (hh:mm:ss) | 821:31:17 | 996:19:02 | 1817:50:20 | 842:09:50 |
| | Actual Playing Time (hh:mm:ss) | 649:13:37 | 734:48:59 | 1384:02:36 | 739:44:48 |
| | Event Impressions (M) | 6,038.28 | 2,976.80 | 9,015.08 | 5,198.67 |
| Sponsorship Evaluation | Visibility (hh:mm:ss) | 297:04:15 | 363:27:38 | 660:31:53 | 522:35:05 |
| | Sponsorship Impressions (M) | 2,204 | 773 | 2,976 | 2,691 |
| | 100% Media Equivalency (€) | 23,516,566 | 7,856,644 | 31,373,210 | 27,548,227 |
| | QI Media Value (€) | 5,191,907 | 1,812,845 | 7,004,752 | 5,900,457 |
| | Average Sequence Duration (sec.) | 5.15 | 5.28 | 5.22 | 5.54 |
| | Ratio Visibility/Broadcast Time (%) | 36.2 | 36.5 | 36.3% | 62.1 |

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

Global Overview

FIS Ski Jumping World Cup 2022/23 – Mixed

| | Live | Non-Live | TOTAL | TOTAL 2021/22 | |
|------------------------|--|-----------|-----------|---------------|-----------|
| FIS Ski Jumping WC | Cumulative Audience* (M) | 8.10 | 64.33 | 72.43 | 58.28 |
| | Number of Broadcasts (#) | 71 | 439 | 510 | 268 |
| | Broadcast Time (hh:mm:ss) | 82:55:49 | 191:57:05 | 274:52:54 | 173:41:08 |
| | Actual Playing Time (hh:mm:ss) | 60:39:01 | 163:21:06 | 224:00:06 | 140:53:44 |
| | Event Impressions (M) | 1,057.16 | 457.16 | 1,514.32 | 1,928.07 |
| Sponsorship Evaluation | Visibility (hh:mm:ss) | 31:48:15 | 91:27:52 | 123:16:07 | 73:44:07 |
| | Sponsorship Impressions (M) | 464 | 119 | 582 | 788 |
| | 100% Media Equivalency (€) | 3,897,868 | 1,008,088 | 4,905,956 | 5,767,134 |
| | QI Media Value (€) | 868,389 | 231,098 | 1,099,487 | 1,254,296 |
| | Average Sequence Duration (sec.) | 4.21 | 3.87 | 3.95 | 4.18 |
| | Ratio Visibility/Broadcast Time (%) | 38.4 | 47.6 | 44.8 | 42.5 |

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

Key Insights

- **The 2022/23 season generated the highest media impact in Women's Ski Jumping World Cup history**
- **Overall media impact (incl. mixed) increased by 48% despite of the exclusion of Russia from the analysis**
- **Number of competitions (incl. mixed) increased from 20 to 30 compared to the 2021/22 season**

Cumulative Audience

increased by 49% compared to the previous season (+201M). Germany (+192M) and Norway (+12M) see the biggest increase in absolute numbers while Finland (+345%) and China (+249%) have the highest relative increase.

Cumulative Live audience is up from 53M to 72M (+36%).

Broadcast Time

more than double YOY (+1076h). Coverage on Eurosport increased from 633h to 1440h compared to previous season.

Austria (191h) ranks top in terms of coverage with ORF Sport+ and Eurosport being the major contributors.

Event Impressions (Media Impact)

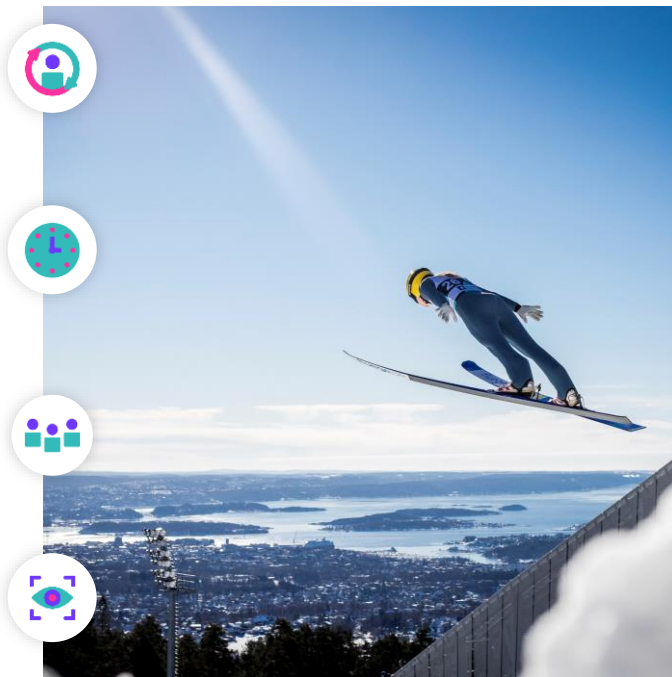
increase by 48% for the women's and mixed World Cup combined. Just for the women's World Cup, they increase by 73%.

15 out of the 20 markets analyzed this year see a positive YOY development, with Germany and Norway seeing the largest increase in absolute numbers and Switzerland and Slovakia in relative numbers.

Sponsorship Visibility

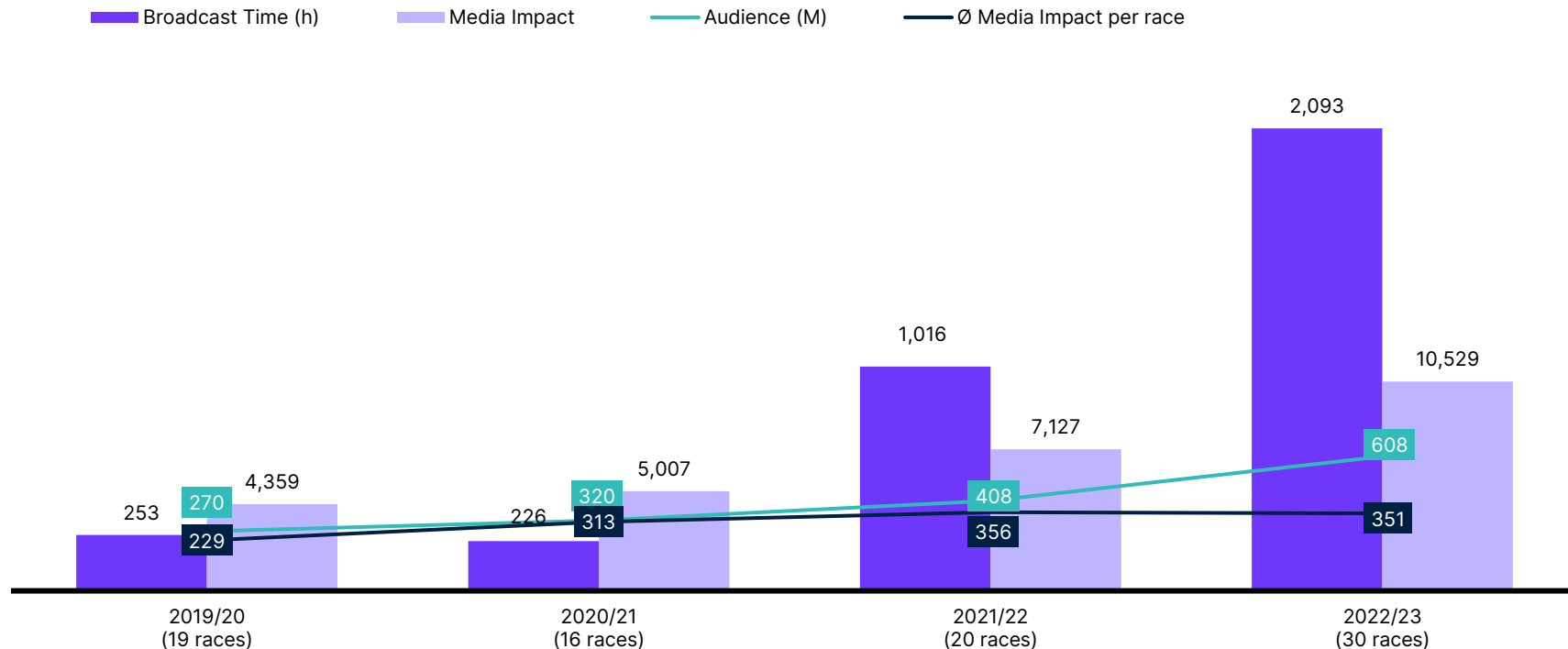
The Start Backdrop proved to be the most visible tool for the two FIS partners Viessmann and Bergstern. With a total exposure time of 319h, it accounts for 42% of all advertising tools.

It is followed by Viessmann's Platinum Circle with a visibility of 195h.



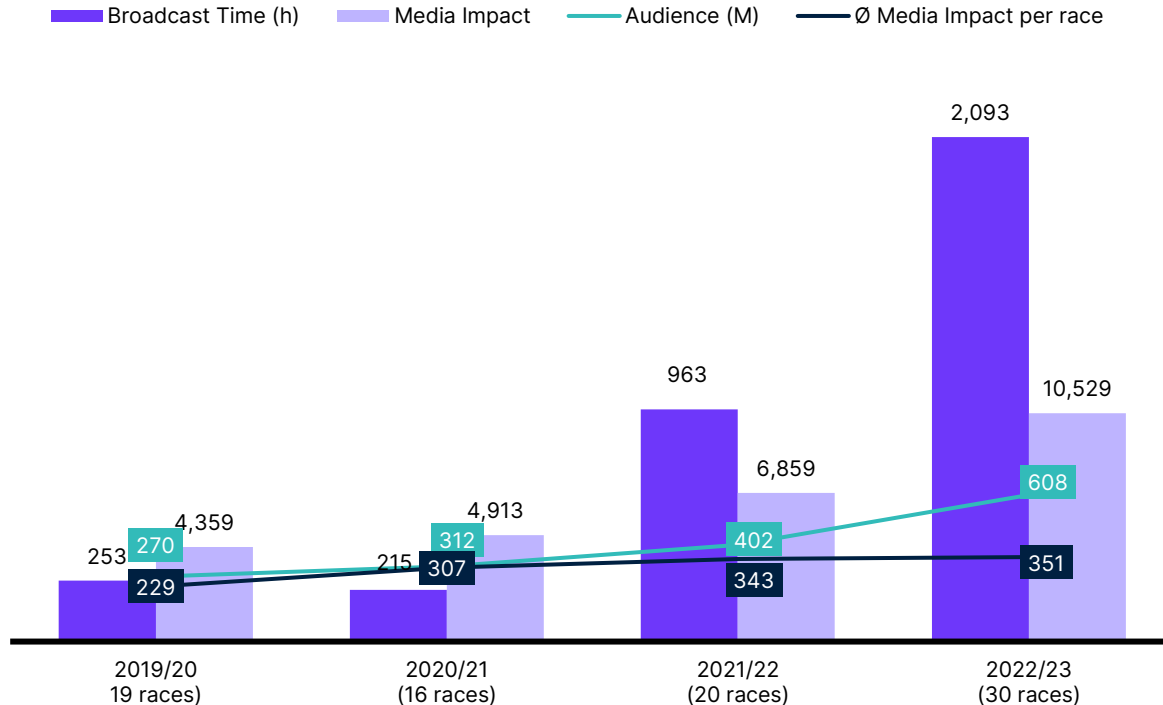
Key Insights

Year-on-year development Women's World Cup (from 2020/21 onwards also including Mixed)



Key Insights

Year-on-year development excl. Russia (from 2020/21 onwards also including Mixed)

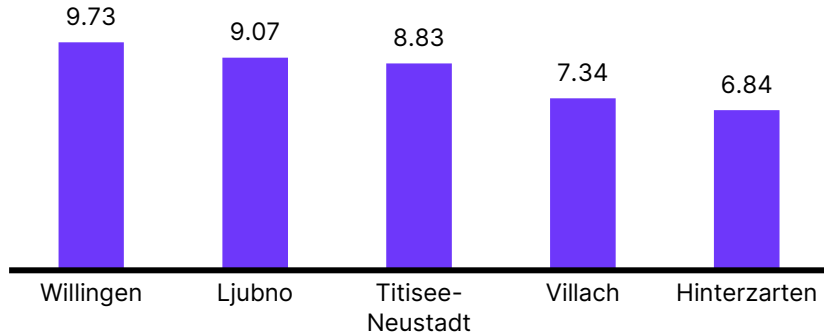


- The positive trend of recent years continues in the 2022/23 season. Excluding Russia, the increase in event impressions is around 53%.
- For the Women's World Cup only, the increase is even 79% with Germany being the main driver (+2,142M impressions).
- However, as 10 more competitions were held in the 2022/23 season, the media impact per competition is at the same level as in the previous season.
- Even though the live audience significantly increased, the live audience per broadcast went down from 0.82M to 0.59M in Germany.

Management Summary

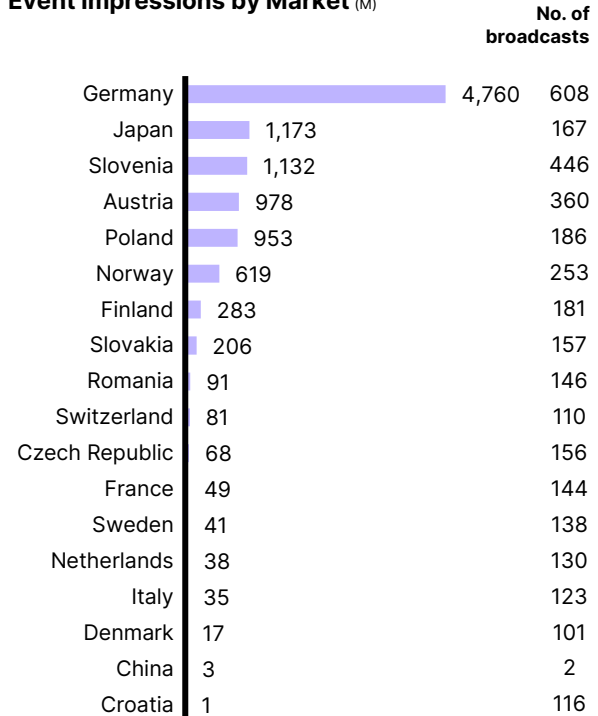
Media Monitoring (Women & Mixed)

Top 5 Venues by Cumulative Live Audience* (M)



- Willingen, staging two individual and one mixed team competition, ranks top in terms of cumulative live audience. ARD accounts for 5.8M (62%), followed by RTV SLO2 with 1.2M.
- After 40% increase compared to previous season, Ljubno jumps to rank 2 in this season with wide-reaching live airings on ARD (3.3M), host broadcaster RTV SLO2 (1.5M) and ORF 1 (1.4M).
- Cumulative numbers of the top 5 venues remain stable.
- Germany (+71%) and Japan (+9%) keep their top positions in the country ranking by media impact followed by Slovenia (+31%), Austria (+42%) and Poland (+38%).

Event Impressions by Market (M)

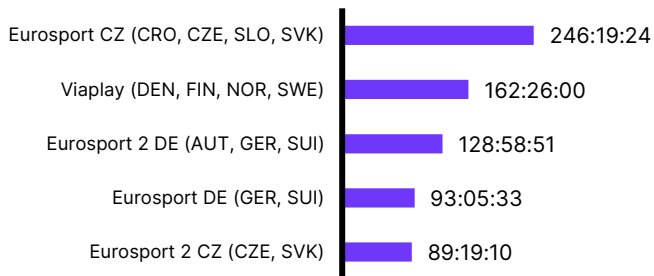


*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+ /Estimations by Nielsen Sports

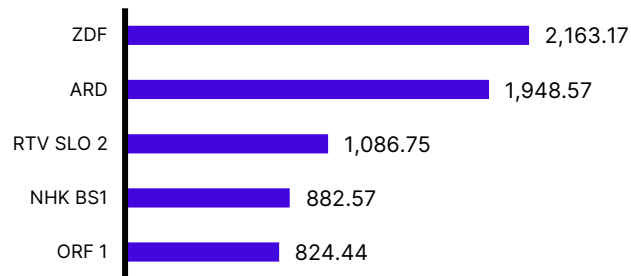
Management Summary

Media Monitoring (Women & Mixed)

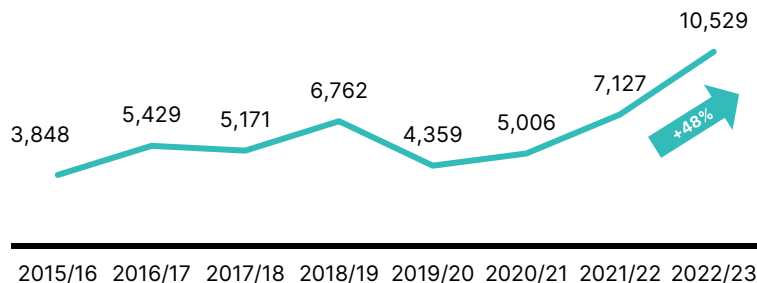
Top 5 Channels by Broadcast Time (hh:mm:ss)



Top 5 Channels by Event Impressions (M)



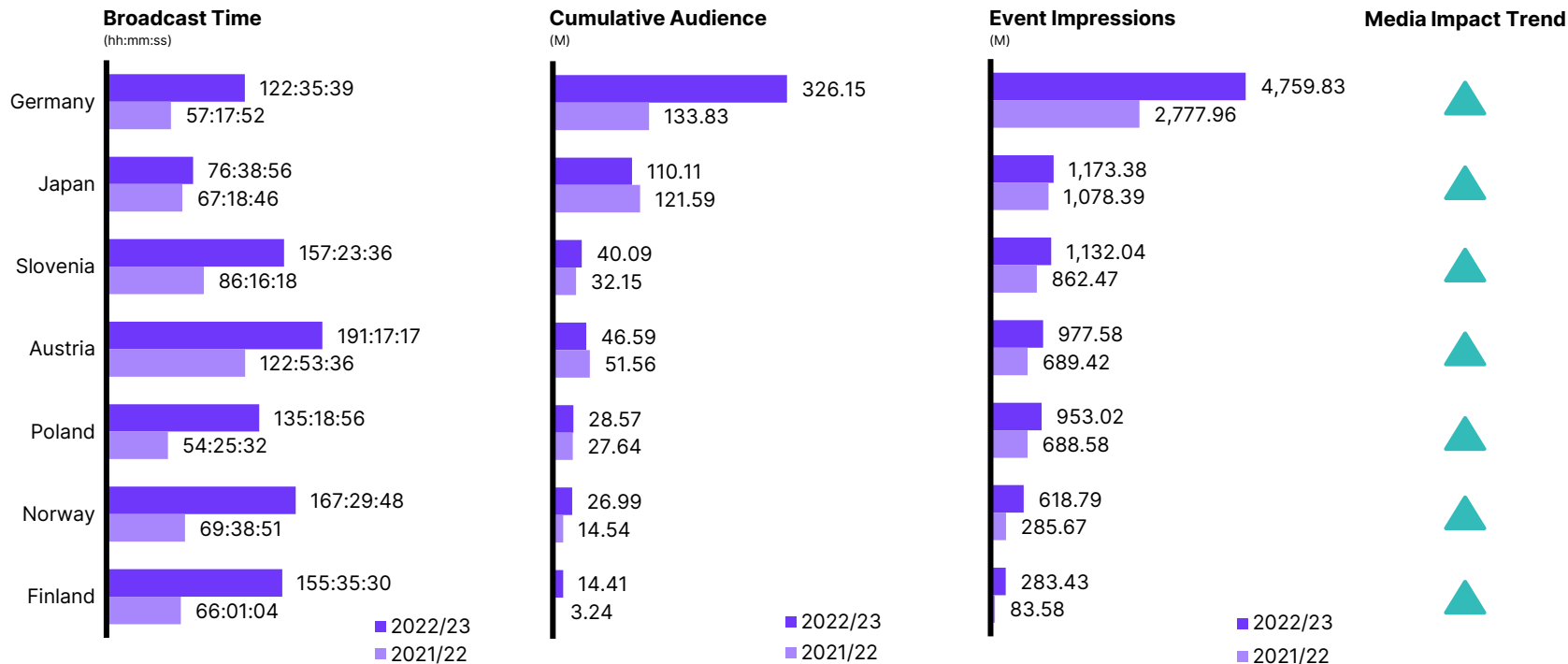
World Cup Event Impressions Trend (M)



- Eurosport appears four times in the channel ranking by broadcast time this season. Together, all Eurosport channels represent 69% of total coverage.
- Live coverage on Viaplay increased from 65h to 162h.
- German public broadcasters ARD & ZDF dominate the channel ranking by media impact. Combined they account for 39% of the total media impact.
- Though RTV SLO2 moves down from 2nd to 3rd place, the media impact generated by the channel increased in 33%.

Media Monitoring

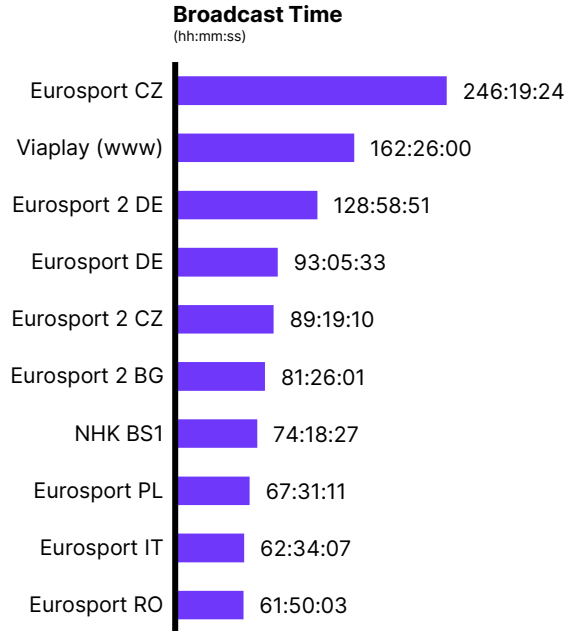
Top 7 trending countries by Event Impressions (Women & Mixed)



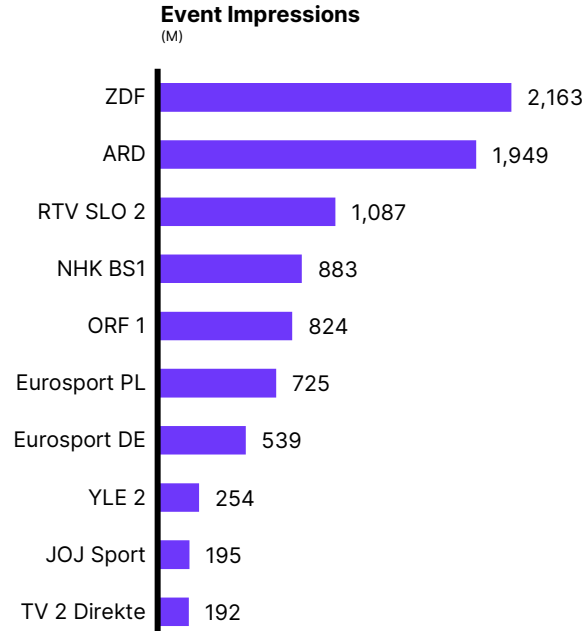
*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+ /Estimations by Nielsen Sports

Media Monitoring

Top 10 channels (Women & Mixed)



51% OF TOTAL

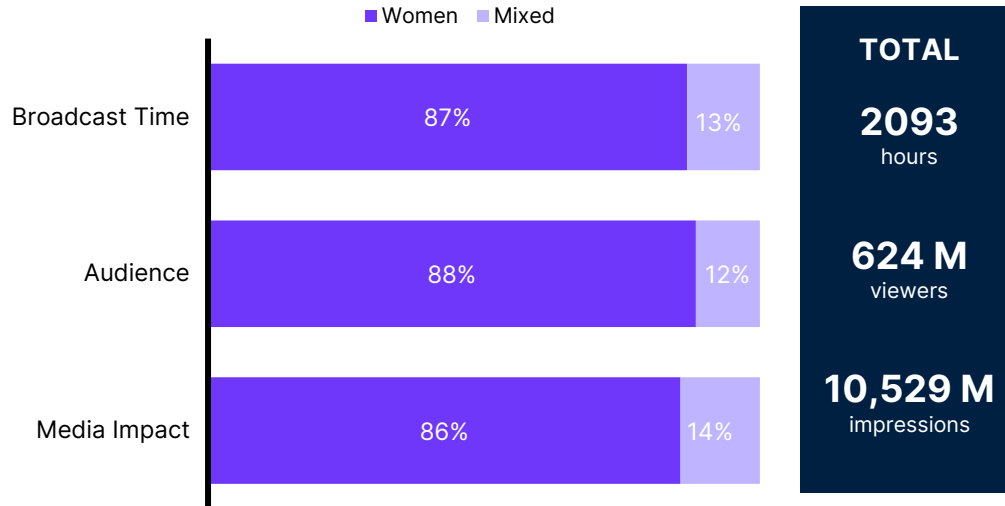


84% OF TOTAL

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

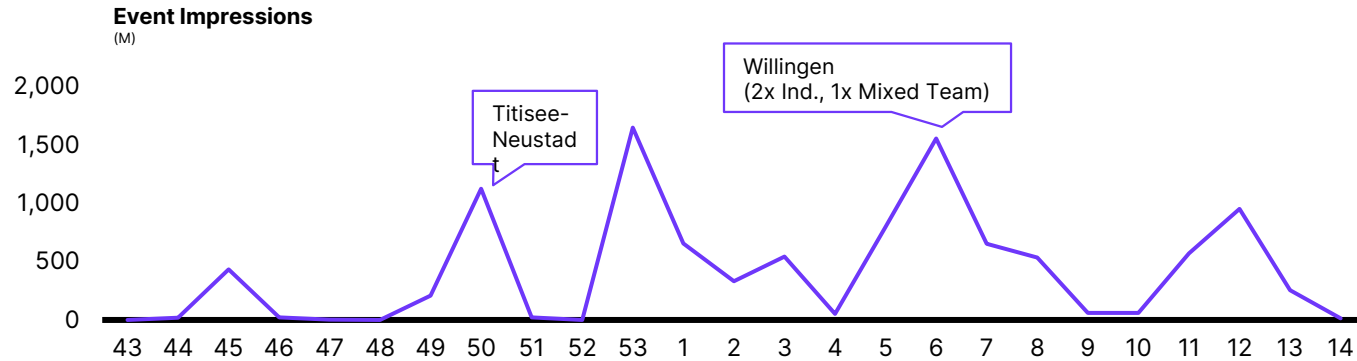
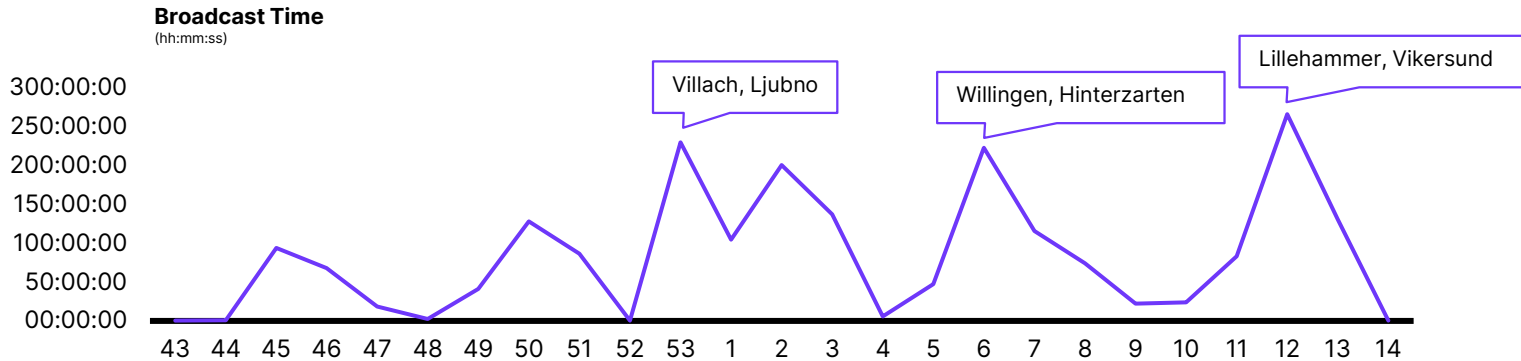
Media Monitoring

Gender comparison



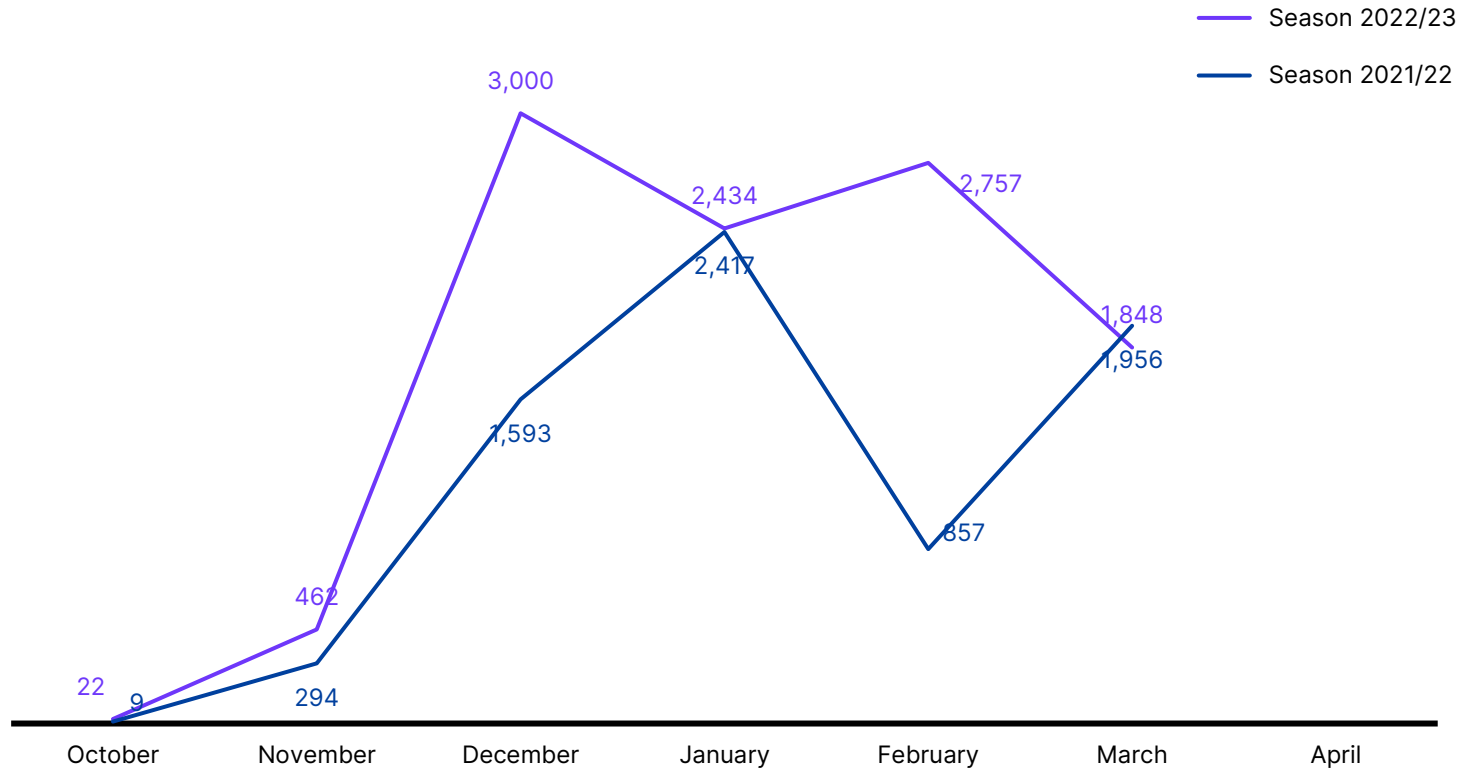
Media Monitoring

Weekly coverage trend (Women & Mixed)



Media Monitoring

Season Comparison by Event Impressions (Women & Mixed)



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:

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



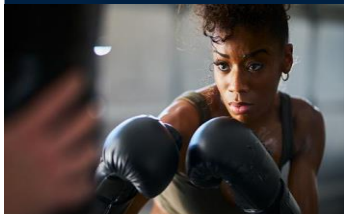
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We provide brands and rights holders the knowledge to identify and connect with the audiences that matter most to them.



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



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Global solution



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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

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leagues & events**

monitored by cutting-edge image detection & machine learning technologies



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hours**

of video content across TV, social & digital platforms captured annually by a global infrastructure



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brands**

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



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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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