



Audi FIS Ski World Cup 2023/24

TV Media Evaluation – Event Summary



Audi
FIS Ski World Cup

Expertise by Nielsen Sports
Your contacts: Alexander Karduck



Introduction

Study scope

Object of investigation/event:	Audi FIS Ski World Cup
Monitoring period:	2023/24 Season
Sponsors:	Audi, Longines, Resort
Markets*:	Austria, Bulgaria, Canada, China, Croatia, Czech Republic, Denmark, Finland, France, Germany, Italy, Japan, Netherlands, Norway, Poland, Slovakia, 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 is excluded from this year's analysis and has been so since the 2022/23 season. All multi-year comparisons are excluding the Russian market.

Presentation of results

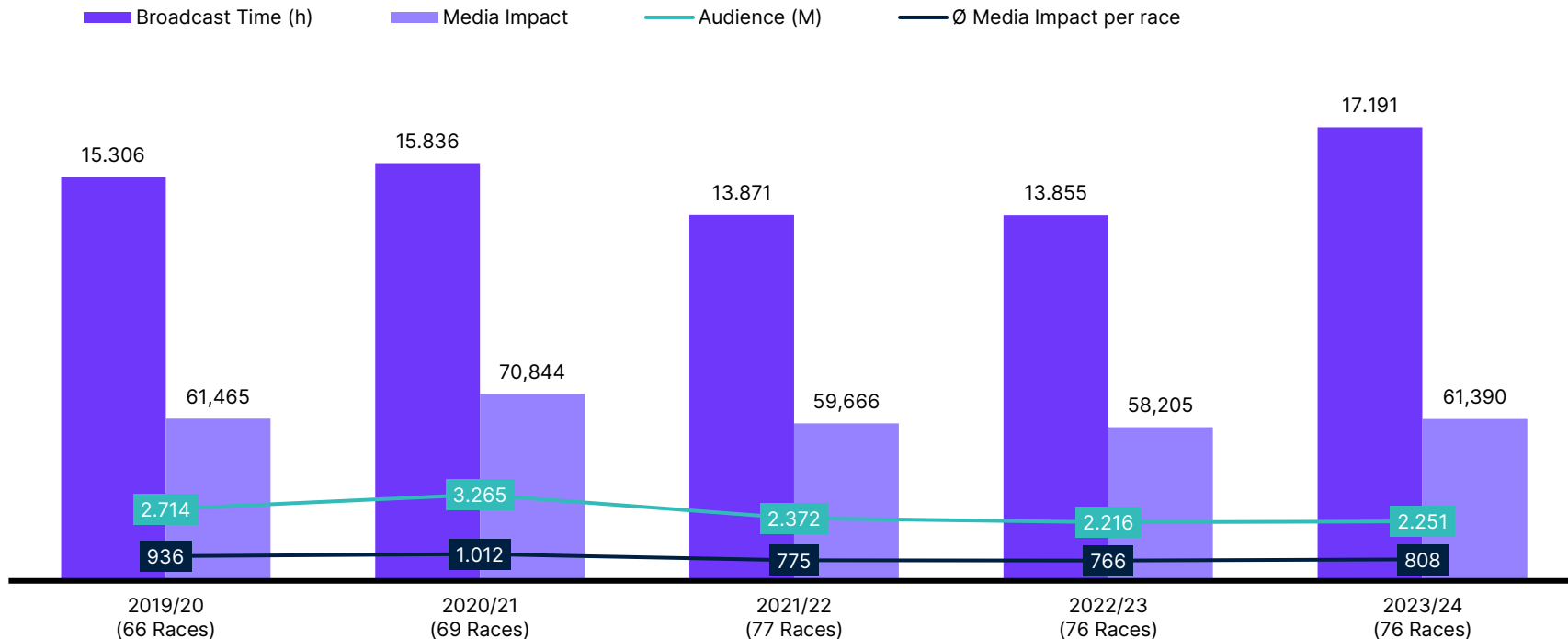
Global Overview

Audi FIS Ski World Cup 2023/24

	Live	Non-Live	TOTAL	TOTAL 2022/23	TREND	
Audi FIS Ski WC	Cumulative Audience (M)	376	1,875	2,251	2,216	+2%
	Number of Broadcasts (#)	3,745	23,020	26,765	21,786	+23%
	Broadcast Time (hrs)	4,780	12,411	17,191	13,855	+24%
	Actual Playing Time (hrs)	3,606	10,884	14,490	11,309	+28%
	Event Impressions (M)	46,095	15,295	61,390	58,205	+5%
Sponsorship Evaluation	Visibility (hrs)	3,655	9,618	13,273	11,521	+15%
	Sponsorship Impressions (M)	34,166	9,382	43,547	44,724	-3%
	100% Media Equivalency (M€)	502.2	150.0	652.2	678.4	-4%
	Q1 Media Value (M€)	122.7	34.8	157.5	162.1	-3%
	Average Sequence Duration (sec.)	4.5	4.2	4.3	4.1	+5%
	Ratio Visibility/Broadcast Time (%)	76.5	77.5	77.2	83.2	-7%

Season Comparison

FIS Alpine Skiing World Cup

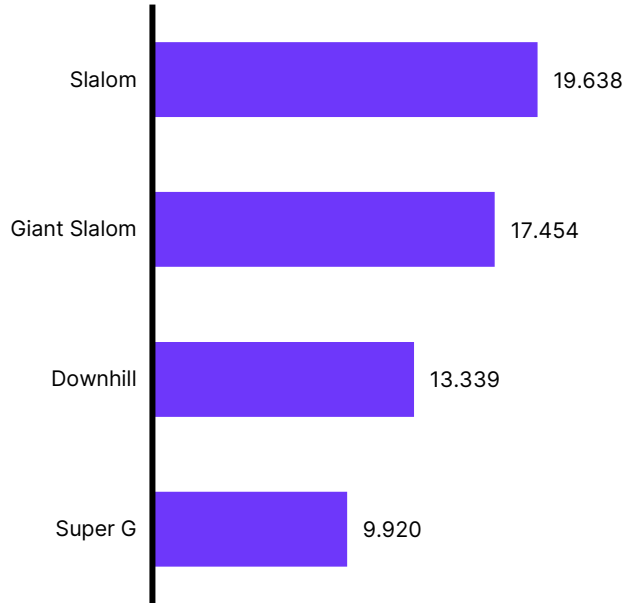


Management Summary

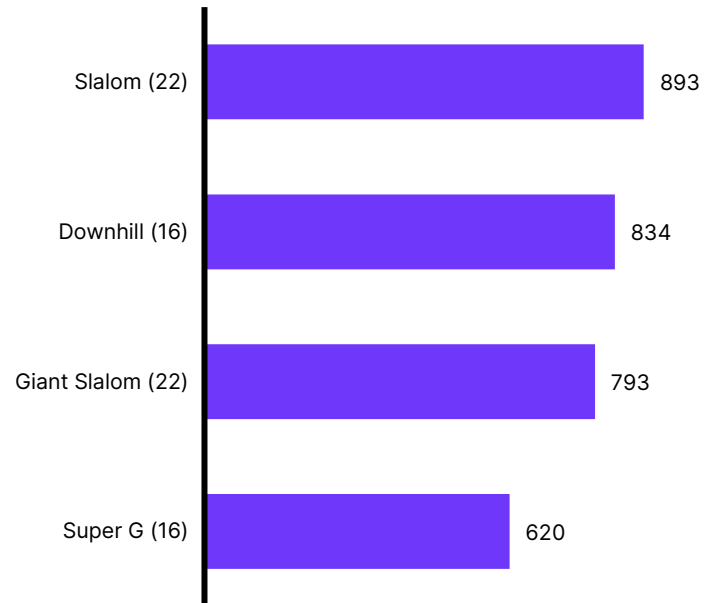
Event ranking

Excluding landmark events Kitzbühel & Wengen, DH races only generate 5% more media impact than Super G

Media Impact (M)

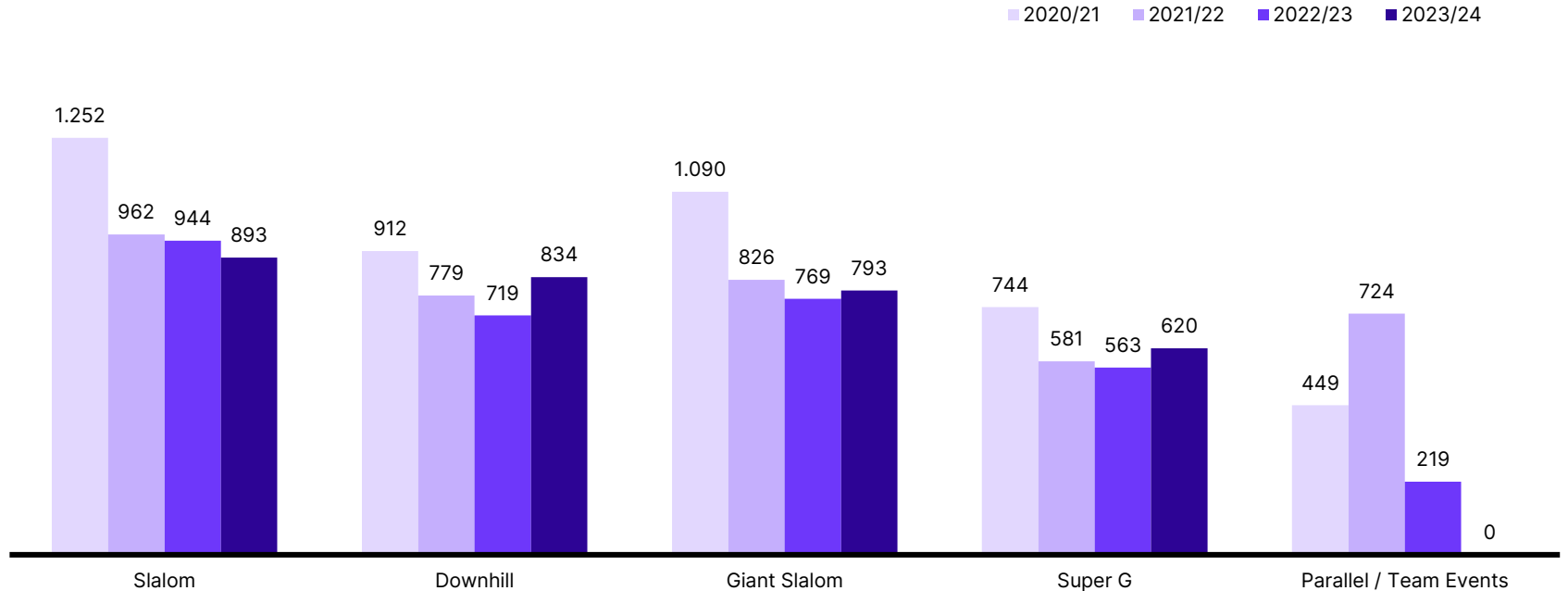


Ø Media Impact per race (M)



Management Summary

Average Media Impact (M) per Race & Discipline – Trend Chart



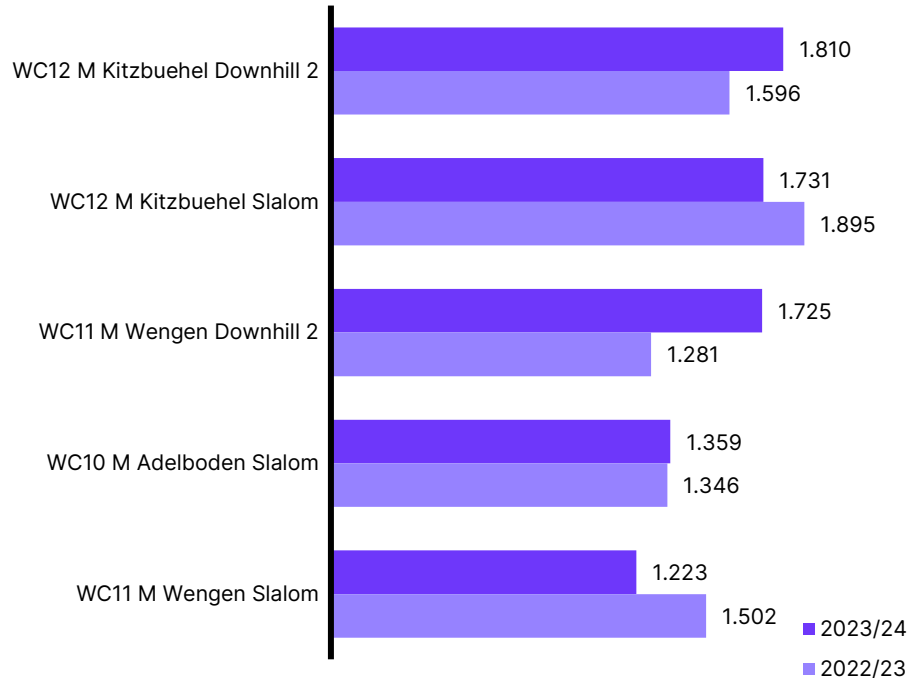
Management Summary

Key Insights

Key Takeaways

- In terms of media impact, this season is the most successful one in the past 3 years.
- Compared to the previous season, all media KPI increase: Broadcast Time +24%, Cumulative Audience +2%, Live Audience +8%, and Media Impact +5%.
- Although there was no major event (WCH / OG) taking place this season, number of concluded World Cup races remain stable compared to last year (76) and the year before (77).
- Among the top markets, media impact increases most notably in Italy (+13%), Czechia (+14%), Sweden (+24%), and France (+28%).
- In China, media impact quintuples thanks to coverage of the Women's Super G in Cortina d'Ampezzo and the Men's Giant Slalom in Val d'Isère on CCTV.
- In Slovakia, media impact declines by 40% overall and especially strong following Petra Vlhová's injury in Jasna.
- Saturday's Downhill in Kitzbühel takes over the media impact lead from Sunday's Slalom again. Top market remains Germany where ARD's live airing pulled in an average audience of 2.72M (2.44M on ZDF last year).

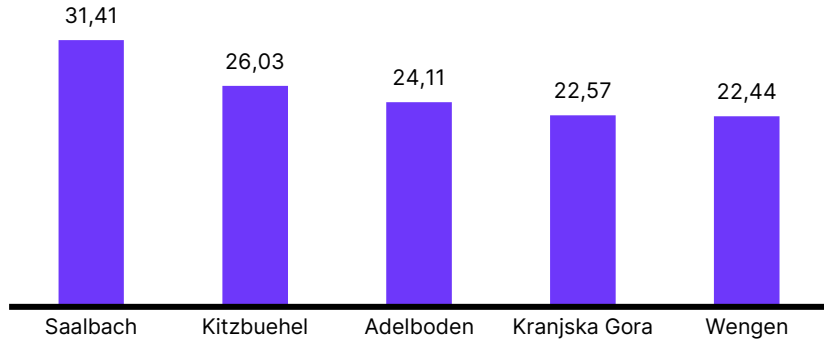
Top-5 Competitions by Media Impact (M)



Management Summary

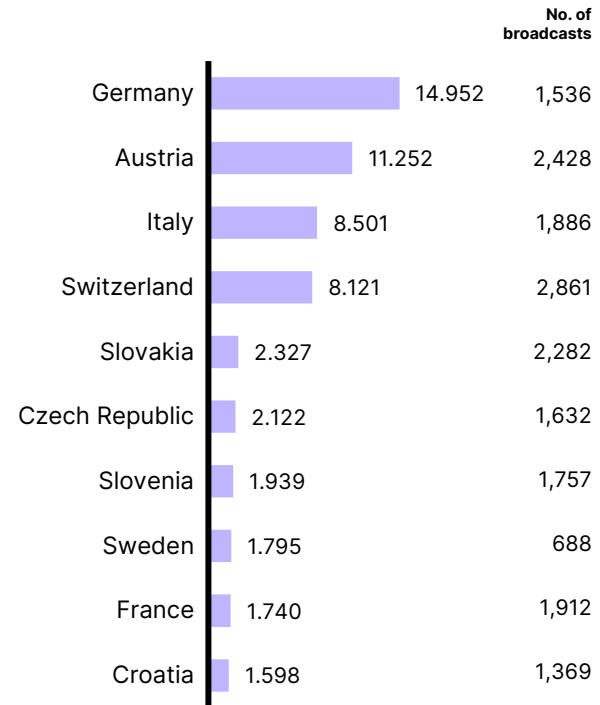
Media Monitoring

Top 5 Venues by Cumulative Live Audience (M)



- The season final – this year staged in Saalbach – traditionally ranks top in terms of cumulative live audience.
- Compared to Soldeu 2023, numbers decline by 2M (-5%). Considering the cancellation of the men's DH and the suspension of the Team Parallel event, avg. live audience per race goes up by 22%.
- Kitzbühel climbs up 1 spot in the ranking, overtaking Kranjska Gora, despite a 5% decline in cum. live audience YOY.
- Looking at the country ranking by event impressions, the top-4 all see a positive development YOY with Italy (+13%) and Switzerland (6%) swapping places.

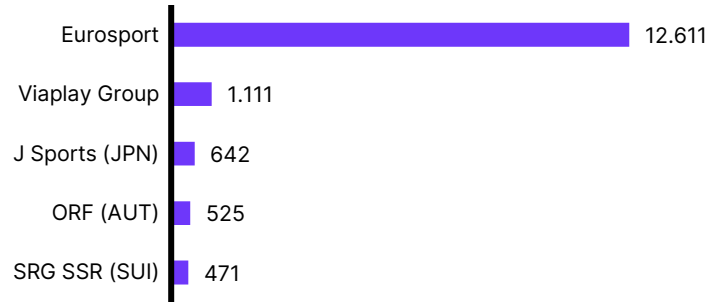
Event Impressions by Market – Top-10 (M)



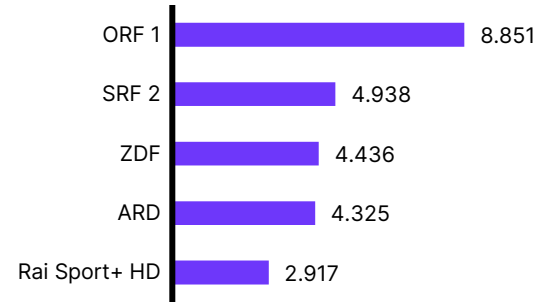
Management Summary

Media Monitoring

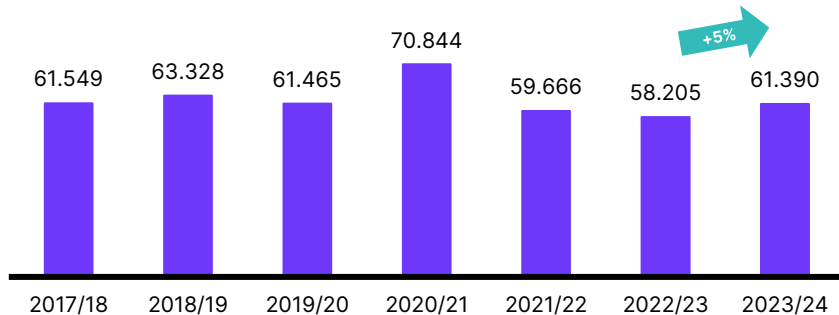
Top 5 Broadcasters by Broadcast Time (hours)



Top 5 Channels by Event Impressions (M)



World Cup Event Impressions Trend (M)



- With almost 13,000 hours of broadcast time, the various Eurosport feeds account for 73% of total coverage but only 3% of cumulative audience (81M) and 15% of event impressions (9.1bn).
- The top-4 channels in terms of media impact remain unchanged to the previous season, with Swiss SRF2 overtaking ARD & ZDF from Germany.
- Italian Rai Sport climbs up to 5th place again after being replaced by Slovakian JOJ Sport last year.
- Slovakia is the only market in the top-5 with a negative media impact trend owing to Petra Vihová injury in Jasna just halfway through the season.

Media Monitoring

By country (in alphabetic order) – (1/2)

Country	Number of Broadcasts (#)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Actual Playing Time (hh:mm:ss)	Event Impressions (M)
Austria	2,428	330.00	1353:01:47	1099:55:52	11,251.88
Bulgaria	1,367	17.30	1095:32:25	950:49:23	451.77
Canada	175	5.50	32:56:25	24:52:30	217.42
China	21	22.30	10:12:33	9:41:52	409.45
Croatia	1,369	58.51	977:39:11	863:27:42	1,597.87
Czech Republic	1,632	103.84	1010:30:27	897:07:04	2,122.08
Denmark	396	3.09	450:19:14	365:44:07	119.96
Finland	629	69.53	571:01:07	447:07:05	1,456.37
France	1,912	151.87	707:01:05	622:55:16	1,740.46
Germany	1,536	472.06	870:48:44	766:48:54	14,951.92
Italy	1,866	434.23	1112:17:32	971:02:06	8,500.67
Japan	365	2.24	642:15:27	276:00:45	201.64

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

Media Monitoring

By country (in alphabetic order) – (2/2)

Country	Number of Broadcasts (#)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Actual Playing Time (hh:mm:ss)	Event Impressions (M)
Netherlands	1,082	3.95	916:30:08	805:34:37	219.44
Norway	937	57.37	728:40:47	575:50:29	1,191.53
Poland	1,334	60.01	920:19:00	827:39:53	1,503.35
Slovakia	2,282	108.24	1353:14:27	1171:29:42	2,327.19
Slovenia	1,757	53.09	1011:49:09	889:46:32	1,938.78
South Korea	36	0.11	40:27:59	36:39:15	13.66
Spain	1,065	8.75	834:22:43	733:11:02	263.66
Sweden	688	81.60	513:30:40	395:51:44	1,795.02
Switzerland	2,861	194.02	1283:32:59	1083:07:42	8,121.05
United Kingdom	1,010	8.82	739:59:04	661:45:45	581.21
USA	17	4.45	14:58:56	13:12:12	413.95
TOTAL	26,765	2,251	17191:01:47	14489:41:29	61,390.32

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

Media Monitoring

By country (in alphabetic order) – Men (1/2)

Country	Number of Broadcasts (#)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Actual Playing Time (hh:mm:ss)	Event Impressions (M)
Austria	1,357	231.76	664:29:19	525:31:50	6,772.14
Bulgaria	766	14.63	619:52:31	528:48:15	273.60
Canada	40	1.98	7:55:24	6:45:48	50.23
China	7	5.87	4:36:51	4:22:59	111.49
Croatia	623	33.43	452:49:22	393:36:15	809.40
Czech Republic	702	41.44	459:39:29	402:22:12	821.73
Denmark	187	2.30	215:29:35	170:24:55	61.22
Finland	311	47.05	257:39:11	195:28:12	705.47
France	1,169	127.71	352:45:59	305:40:13	1,143.09
Germany	801	318.97	413:22:15	355:52:43	9,065.22
Italy	860	130.72	512:33:52	439:47:24	3,747.25
Japan	214	0.59	574:49:53	231:09:51	180.97

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

Media Monitoring

By country (in alphabetic order) – Men (2/2)

Country	Number of Broadcasts (#)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Actual Playing Time (hh:mm:ss)	Event Impressions (M)
Netherlands	482	1.72	416:48:35	364:15:16	109.34
Norway	565	42.84	391:13:52	303:55:17	736.09
Poland	594	28.67	436:47:57	386:26:17	736.99
Slovakia	963	29.71	614:10:42	530:50:22	531.44
Slovenia	877	31.20	469:51:25	406:45:37	938.88
South Korea	14	0.04	15:29:19	13:52:27	4.95
Spain	472	4.59	385:21:40	332:03:00	133.57
Sweden	303	34.20	227:24:29	170:16:00	637.78
Switzerland	1,520	120.25	613:07:35	508:50:43	4,629.13
United Kingdom	429	7.38	316:13:06	276:26:31	324.25
USA	14	3.45	11:39:24	10:24:06	271.41
TOTAL	13,270	1,260.49	8434:11:45	6863:56:13	32,795.63

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

Media Monitoring

By country (in alphabetic order) – Women (1/2)

Country	Number of Broadcasts (#)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Actual Playing Time (hh:mm:ss)	Event Impressions (M)
Austria	1,273	158.73	688:32:28	574:24:02	4,479.74
Bulgaria	641	7.60	475:39:53	422:01:08	178.17
Canada	150	4.50	25:01:00	18:06:43	167.20
China	14	16.43	5:35:42	5:18:53	297.96
Croatia	788	34.61	524:49:49	469:51:27	788.48
Czech Republic	1,017	85.48	550:50:58	494:44:52	1,300.35
Denmark	209	0.78	234:49:39	195:19:11	58.74
Finland	333	29.34	313:21:55	251:38:53	750.90
France	996	51.32	354:15:06	317:15:03	597.36
Germany	821	229.28	457:26:29	410:56:10	5,886.69
Italy	1,223	362.98	599:43:40	531:14:42	4,753.42
Japan	151	1.44	67:25:33	44:50:54	20.67

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

Media Monitoring

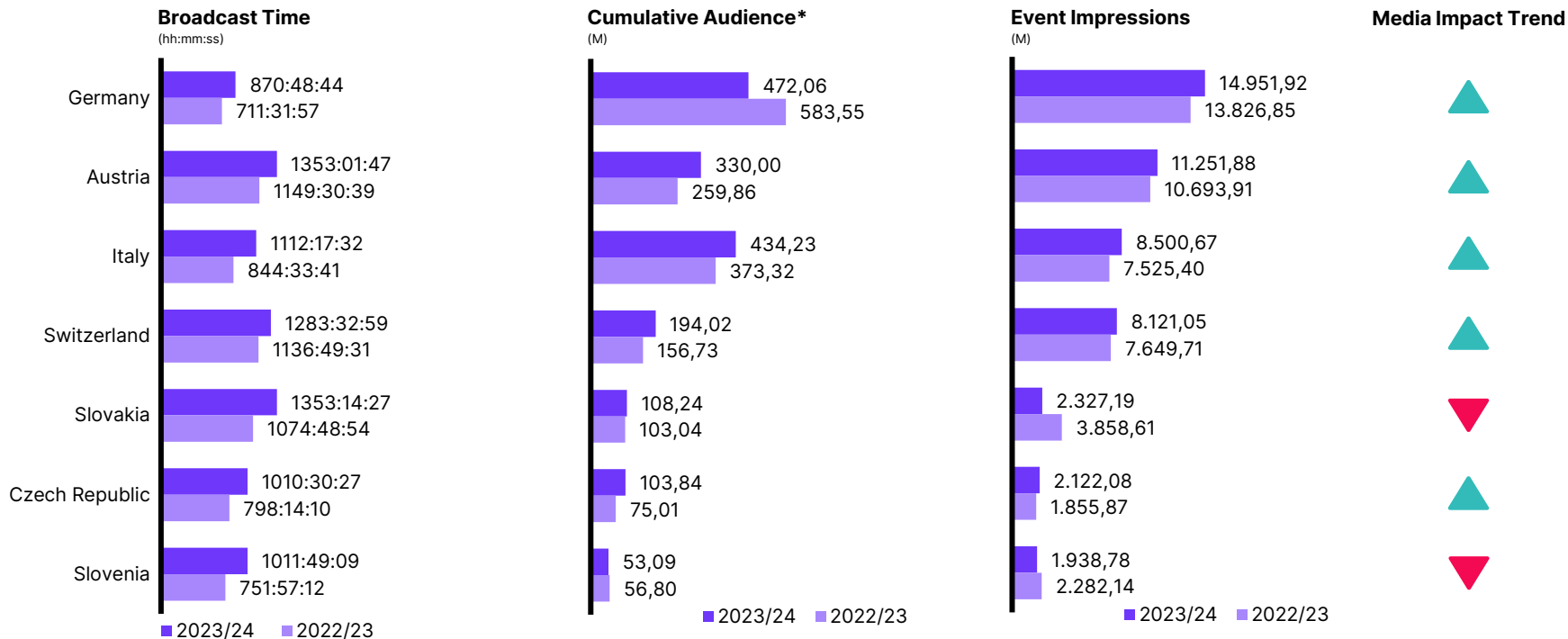
By country (in alphabetic order) – Women (2/2)

Country	Number of Broadcasts (#)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Actual Playing Time (hh:mm:ss)	Event Impressions (M)
Netherlands	600	2.23	499:41:33	441:19:21	110.09
Norway	449	23.94	337:26:55	271:55:12	455.44
Poland	769	40.64	483:31:04	441:13:35	766.35
Slovakia	1,410	90.36	739:03:45	640:39:21	1,795.75
Slovenia	1,041	33.17	541:57:44	483:00:55	999.90
South Korea	22	0.07	24:58:39	22:46:47	8.71
Spain	593	4.16	449:01:03	401:08:02	130.09
Sweden	438	61.79	286:06:11	225:35:44	1,157.24
Switzerland	1,678	104.42	670:25:25	574:16:59	3,491.92
United Kingdom	586	5.13	423:45:58	385:19:14	256.95
USA	6	2.58	3:19:32	2:48:06	142.55
TOTAL	15,207	1,350.97	8756:50:02	7625:45:17	28,594.68

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

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

Ranking by Top 15 trending country

Country	2023/24			2022/23		
	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Event Impressions (M)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Event Impressions (M)
Germany	472.06	870:48:44	14,951.92	583.55	711:31:57	13,826.85
Austria	330.00	1353:01:47	11,251.88	259.86	1149:30:39	10,334.75
Italy	434.23	1112:17:32	8,500.67	373.32	844:33:41	7,525.40
Switzerland	194.02	1283:32:59	8,121.05	156.73	1136:49:31	7,649.71
Slovakia	108.24	1353:14:27	2,327.19	103.04	1074:48:54	3,858.61
Czech Republic	103.84	1010:30:27	2,122.08	75.01	798:14:10	1,855.87
Slovenia	53.09	1011:49:09	1,938.78	56.80	751:57:12	2,282.14
Sweden	81.60	513:30:40	1,795.02	78.20	455:29:16	1,451.79
France	151.87	707:01:05	1,740.46	140.16	571:05:01	1,358.65
Croatia	58.51	977:39:11	1,597.87	44.08	677:46:58	1,566.65
Poland	60.01	920:19:00	1,503.35	50.76	687:55:00	1,337.74
Finland	69.53	571:01:07	1,456.37	56.16	567:09:59	1,243.48
Norway	57.37	728:40:47	1,191.53	64.20	518:15:40	1,327.63
United Kingdom	8.82	739:59:04	581.21	9.91	570:46:47	492.40
Bulgaria	17.30	1095:32:25	451.77	16.57	717:31:59	455.96
TOTAL	2,251	17191:01:47	61,390.32	2,216.38	13854:51:52	58,205.38

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

Media Monitoring

Ranking by trending country – Men

Country	2023/24			2022/23		
	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Event Impressions (M)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Event Impressions (M)
Germany	318.97	413:22:15	9,065.22	354.69	371:25:34	7,832.93
Austria	231.76	664:29:19	6,772.14	179.00	601:29:15	6,408.31
Switzerland	120.25	613:07:35	4,629.13	105.49	601:22:10	4,583.01
Italy	130.72	512:33:52	3,747.25	99.56	437:01:34	3,239.02
France	127.71	352:45:59	1,143.09	101.28	314:24:27	904.69
Slovenia	31.20	469:51:25	938.88	31.77	405:41:19	1,142.60
Czech Republic	41.44	459:39:29	821.73	37.82	432:46:49	884.41
Croatia	33.43	452:49:22	809.40	29.64	374:56:10	1,083.27
Poland	28.67	436:47:57	736.99	19.15	369:16:43	652.57
Norway	42.84	391:13:52	736.09	52.46	285:15:28	954.35
Finland	47.05	257:39:11	705.47	30.80	292:21:14	518.57
Sweden	34.20	227:24:29	637.78	25.52	236:35:11	534.53
Slovakia	29.71	614:10:42	531.44	33.53	515:53:35	1,608.13
United Kingdom	7.38	316:13:06	324.25	6.46	337:41:00	343.48
Bulgaria	14.63	619:52:31	273.60	10.17	630:13:58	294.00
TOTAL	1,260.49	8434:11:45	32,795.63	1,143.58	7791:31:52	31,866.63

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

Media Monitoring

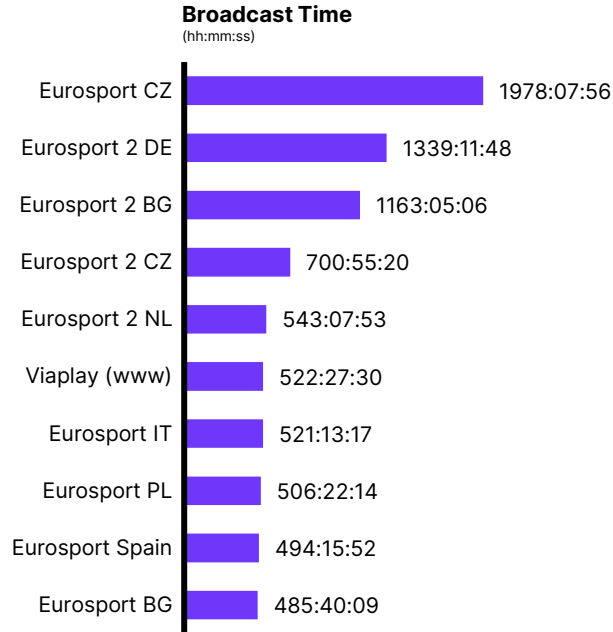
Ranking by trending country – Women

Country	2023/24			2022/23		
	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Event Impressions (M)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Event Impressions (M)
Germany	229.28	457:26:29	5,886.69	306.64	333:11:42	5,940.90
Italy	362.98	599:43:40	4,753.42	327.46	398:48:57	4,262.25
Austria	158.73	688:32:28	4,479.74	130.30	540:13:23	3,898.18
Switzerland	104.42	670:25:25	3,491.92	82.66	526:25:48	3,038.65
Slovakia	90.36	739:03:45	1,795.75	81.97	552:37:26	2,213.42
Czech Republic	85.48	550:50:58	1,300.35	52.26	360:22:59	963.87
Sweden	61.79	286:06:11	1,157.24	63.68	216:06:07	916.59
Slovenia	33.17	541:57:44	999.90	37.97	340:27:51	1,131.10
Croatia	34.61	524:49:49	788.48	20.51	297:03:52	476.69
Poland	40.64	483:31:04	766.35	36.54	314:22:19	679.51
Finland	29.34	313:21:55	750.90	31.54	271:11:00	706.61
France	51.32	354:15:06	597.36	77.97	253:38:54	451.80
Norway	23.94	337:26:55	455.44	21.10	229:40:48	371.82
China	16.43	5:35:42	297.96	17.61	00:19:32	56.51
United Kingdom	5.13	423:45:58	256.95	5.29	223:54:02	147.64
TOTAL	1,350.97	8756:50:02	28,594.68	1,412.70	5964:13:41	26,110.40

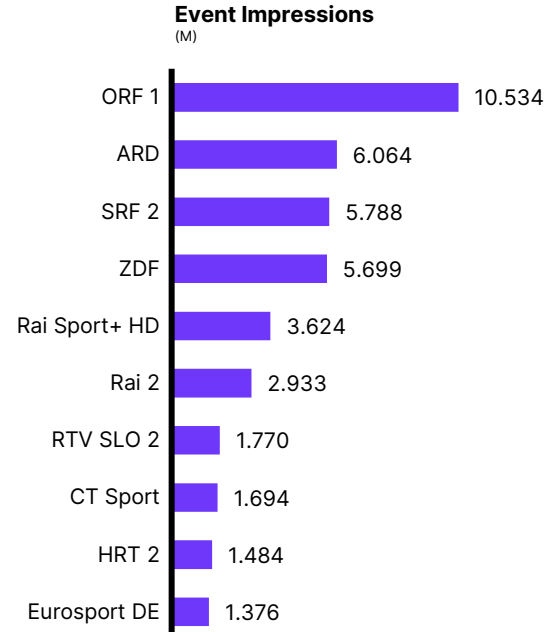
*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+ /Estimations by Nielsen Sports

Media Monitoring

Top 10 channels



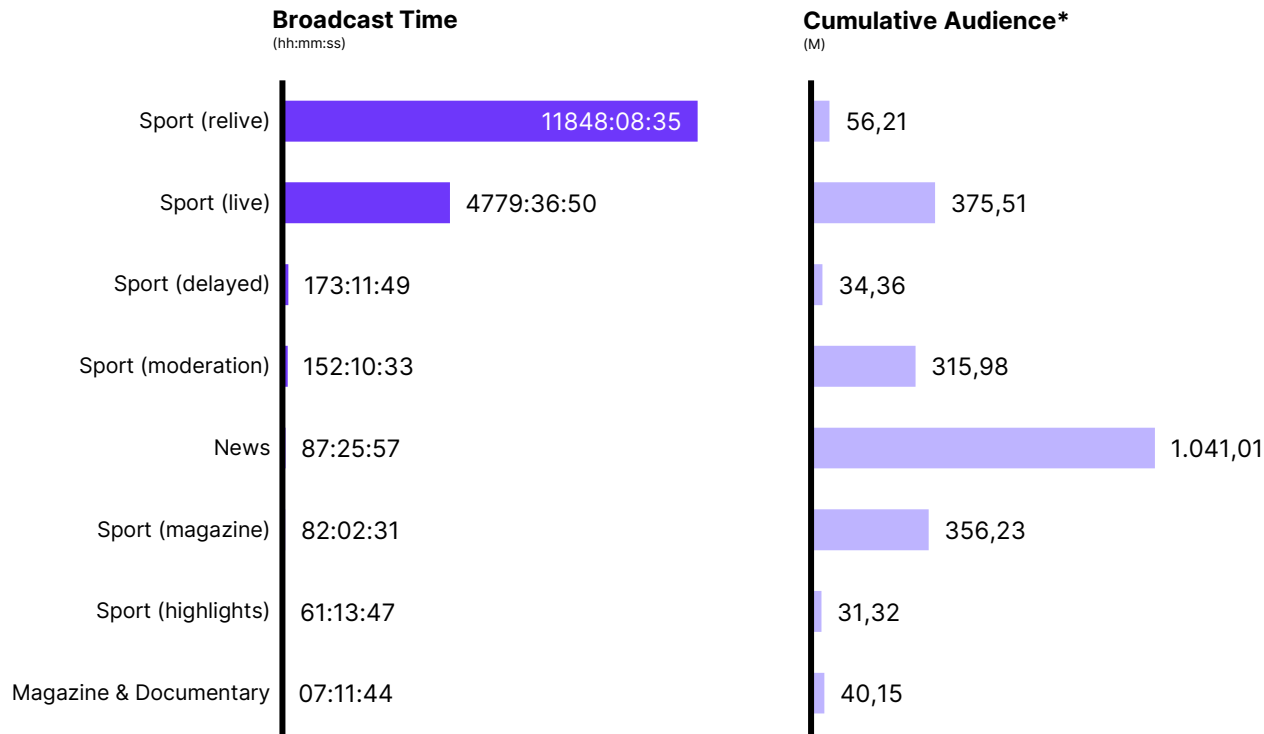
48% OF TOTAL



67% OF TOTAL

Media Monitoring

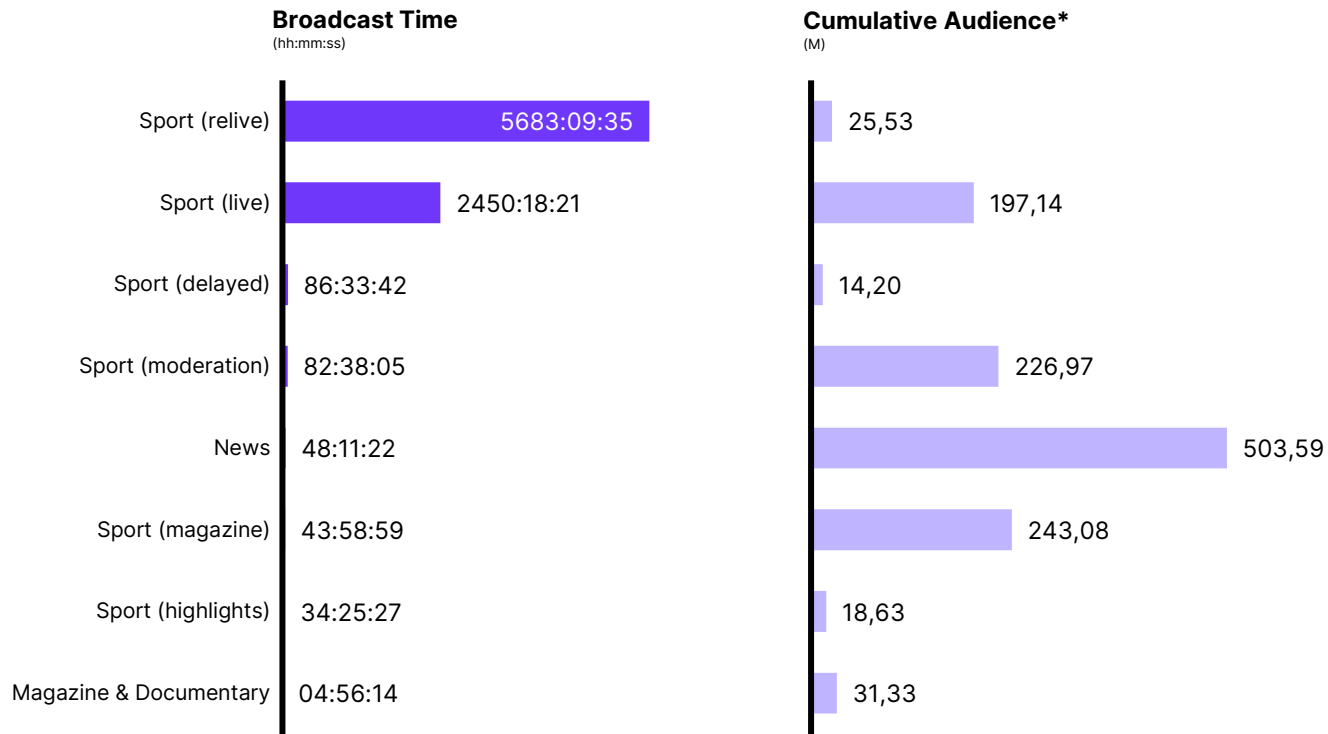
Ranking by program type



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

Media Monitoring

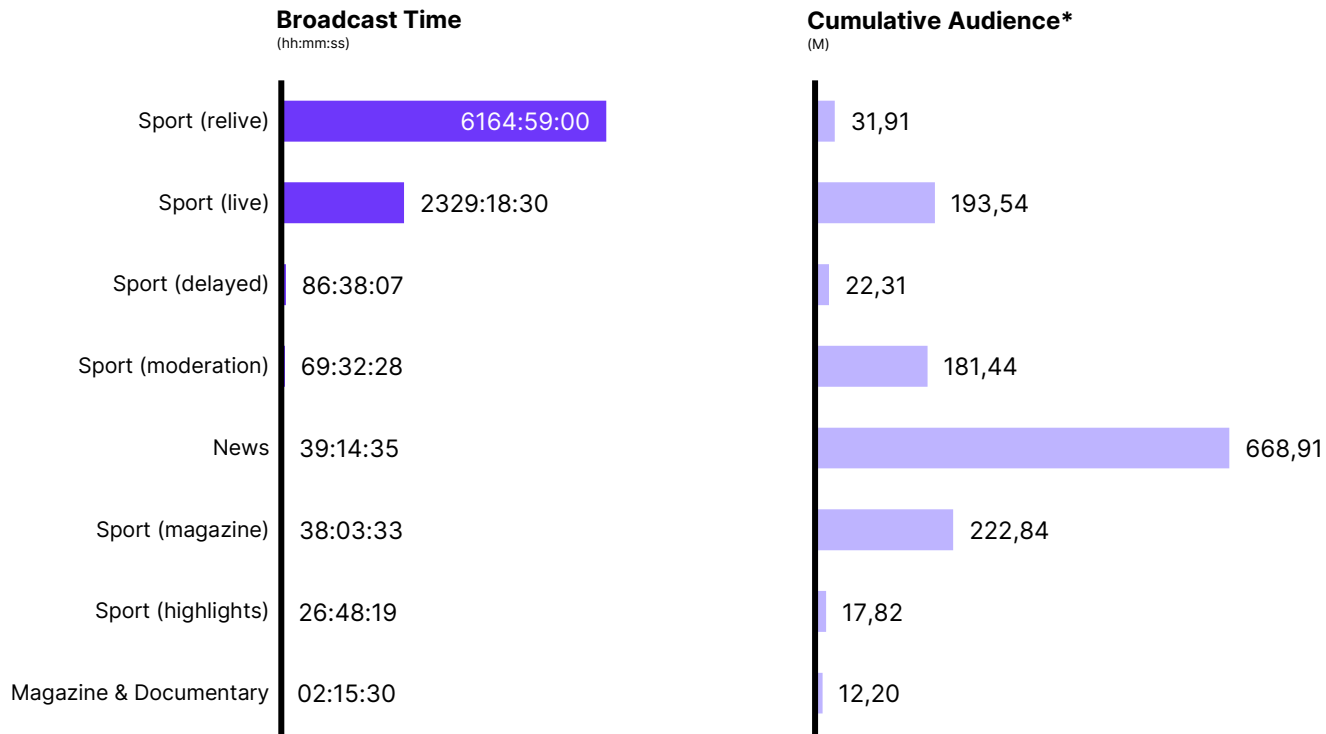
Ranking by program type – Men



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

Media Monitoring

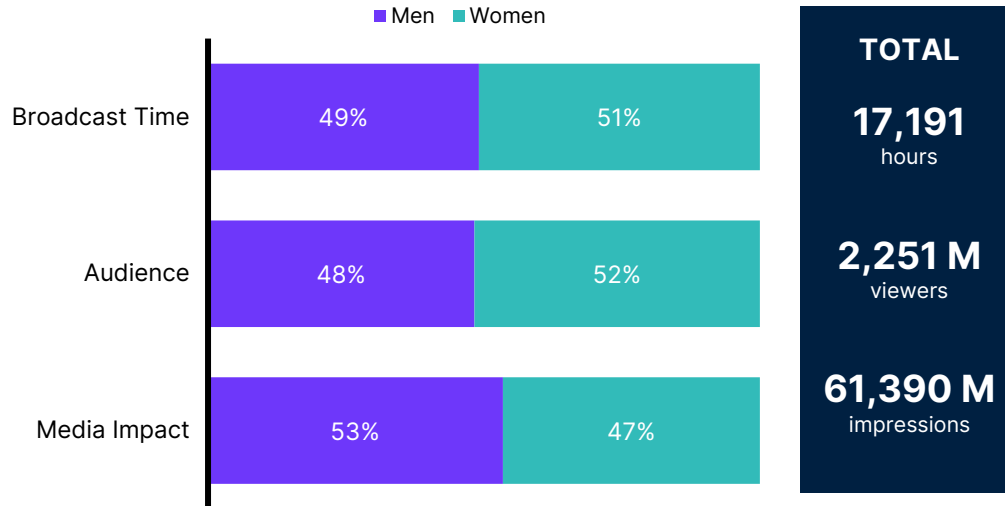
Ranking by program type – Women



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

Media Monitoring

Gender comparison

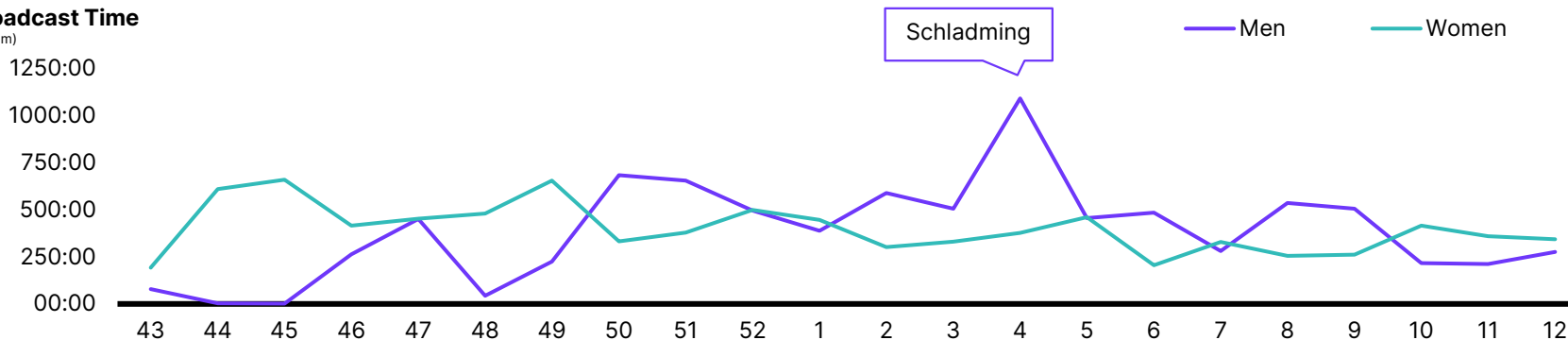


Media Monitoring

Weekly coverage trend

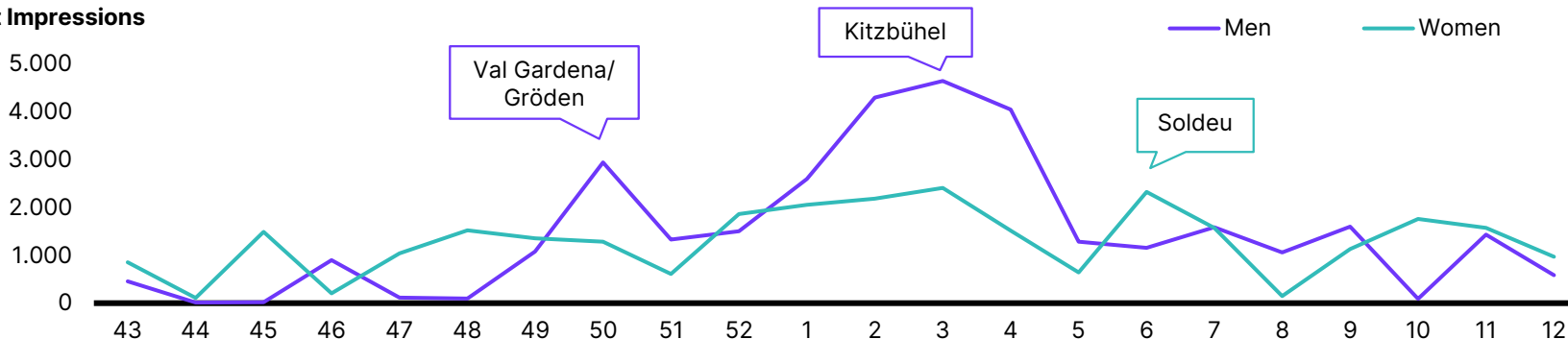
Broadcast Time

(hh:mm)



Event Impressions

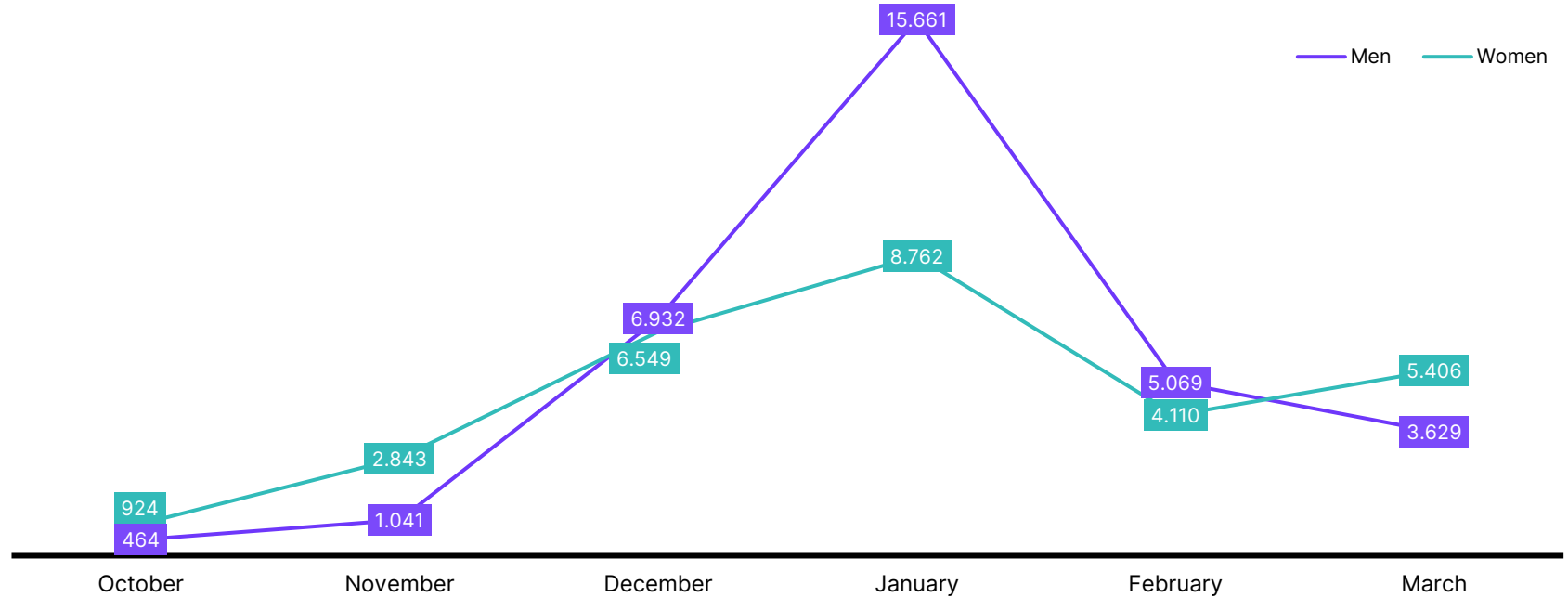
(M)



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

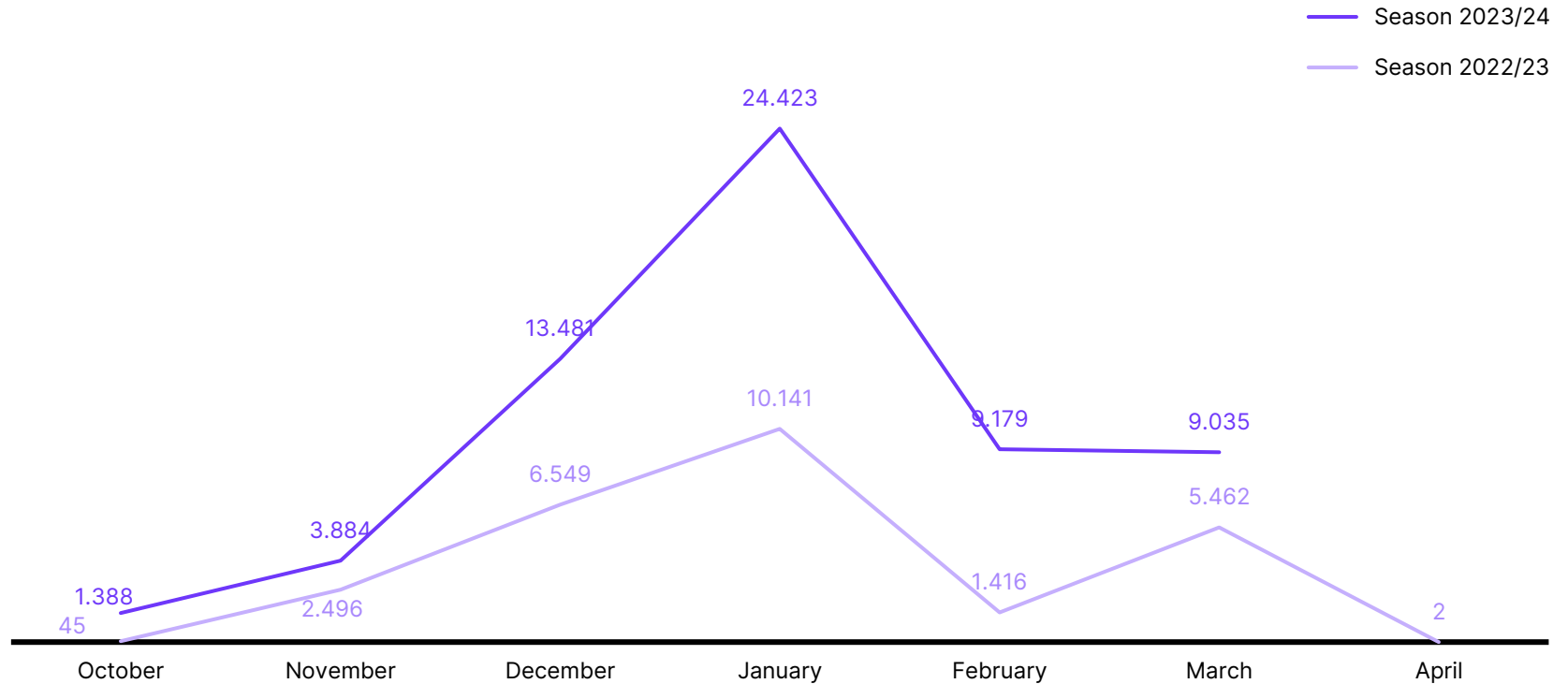
Media Monitoring

Gender Comparison by Event Impressions and Month



Media Monitoring

Season Comparison by Event Impressions



Methodology & Appendix

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.).

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:

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



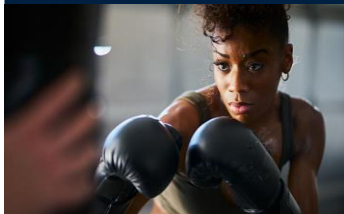
Nielsen Sports is the global leader in sports media valuation, data intelligence and research consulting.

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.

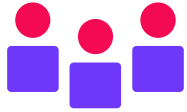
Innovative



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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