FIS Freestyle Ski World Cup 2023/24

TV Media Evaluation – Event Summary



Source: https://www.fis-ski.com/en/freestyle-freeski/freeski/news-multimedia/news-multimedia-news/park-pipe-european-cup-season-set-to-wrap-in-austria

Expertise by Nielsen Sports
Your contacts: Alexander Karduck

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Introduction

Study scope

Object of investigation/event:	FIS Freestyle Ski World Cup (M/W)
Monitoring period:	2023/24 Season
Sponsors:	Swatch (only Park & Pipe World Cup), FIS App (only Ski Cross 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 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.

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Presentation of results

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Global Overview

FIS Freestyle Ski World Cup 2023/24 – Men & Women

		Live	Non-Live	TOTAL	TOTAL 2022/23	TREND
FIS Freestyle Ski World Cup	**Cumulative Audience*** (M)	15	471	**486**	**308**	**+58%**
	Number of Broadcasts (#)	901	3,150	**4,051**	**4,287**	**-6%**
	Broadcast Time (hrs)	845	1,312	**2,157**	**2,157**	**+0%**
	Actual Playing Time (hrs)	688	1,138	**1,826**	**1,619**	**+13%**
	Event Impressions (M)	1,919	7,516	**9,435**	**4,804**	**+96%**
Sponsorship Evaluation	**Visibility** (hrs)	44	50	**94**	**115**	**-18%**
	Sponsorship Impressions (M)	116	205	**321**	**268**	**+20%**
	100% Media Equivalency (M€)	2.0	2.7	**4.7**	**4.5**	**+5%**
	QI Media Value (M€)	0.46	0.58	**1.04**	**0.94**	**+10%**
	Average Sequence Duration (sec.)	4.5	4.1	**4.3**	**4.6**	**-7%**
	Ratio Visibility/Broadcast Time (%)	7.8	6.1	**6.8**	**8.1**	**-16%**

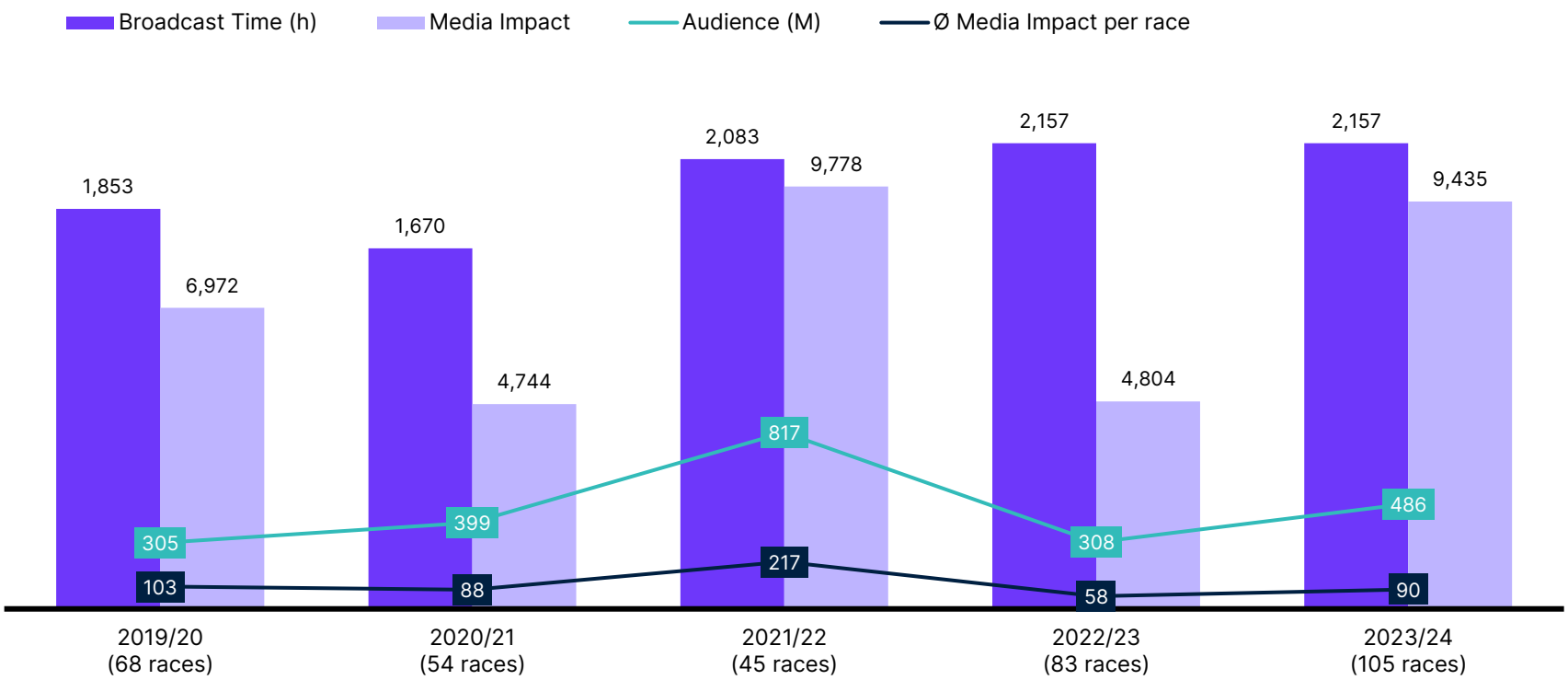
*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+/Estimations by Nielsen Sports

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Season Comparison

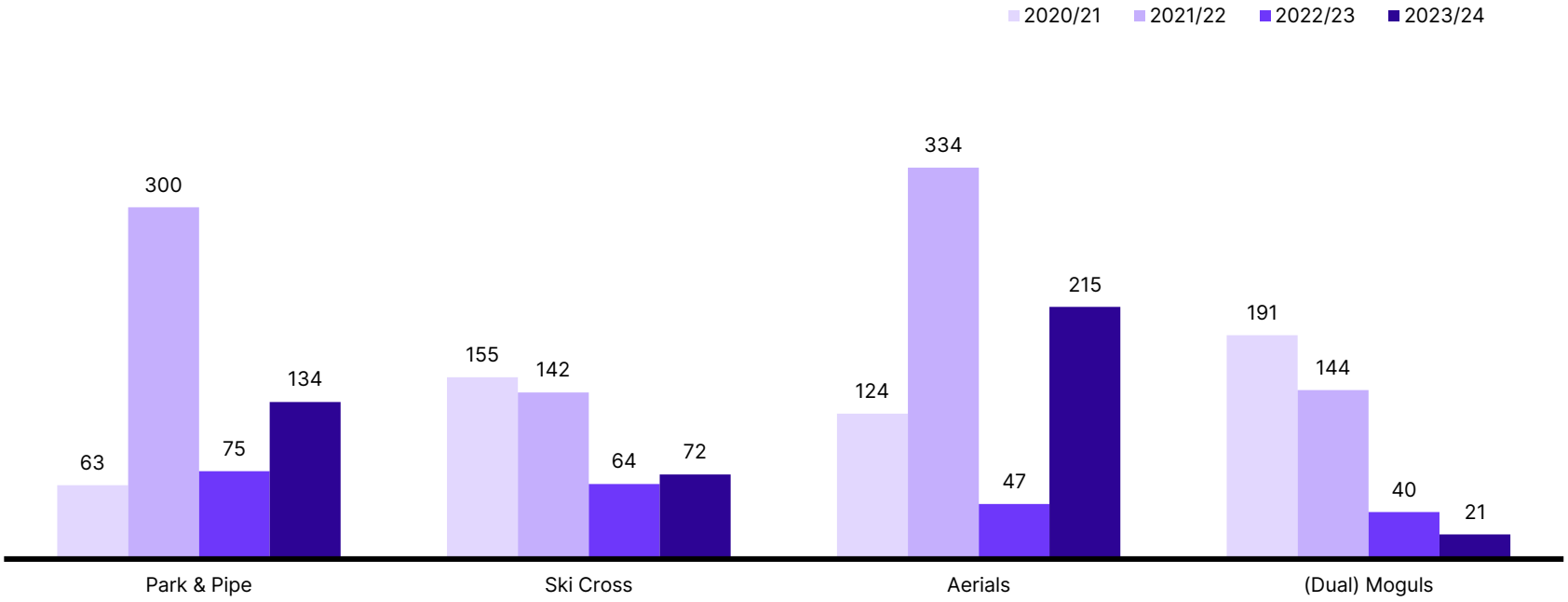
FIS Freestyle Skiing World Cup – Men & Women



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Management Summary

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

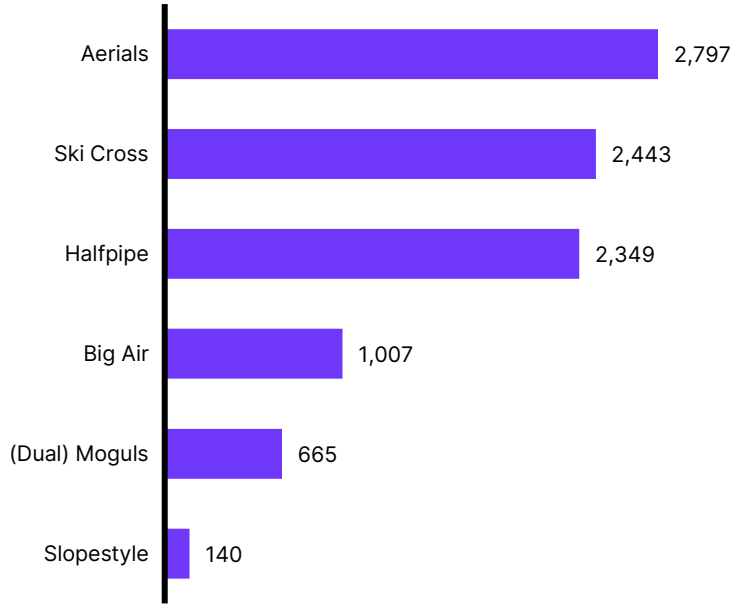


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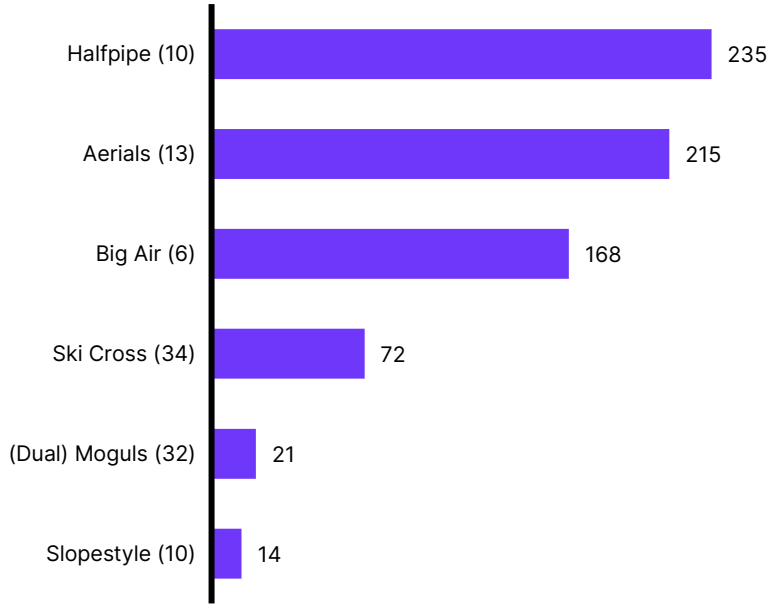
Management Summary

Event Ranking

Media Impact (M)



Ø Media Impact per race (M)



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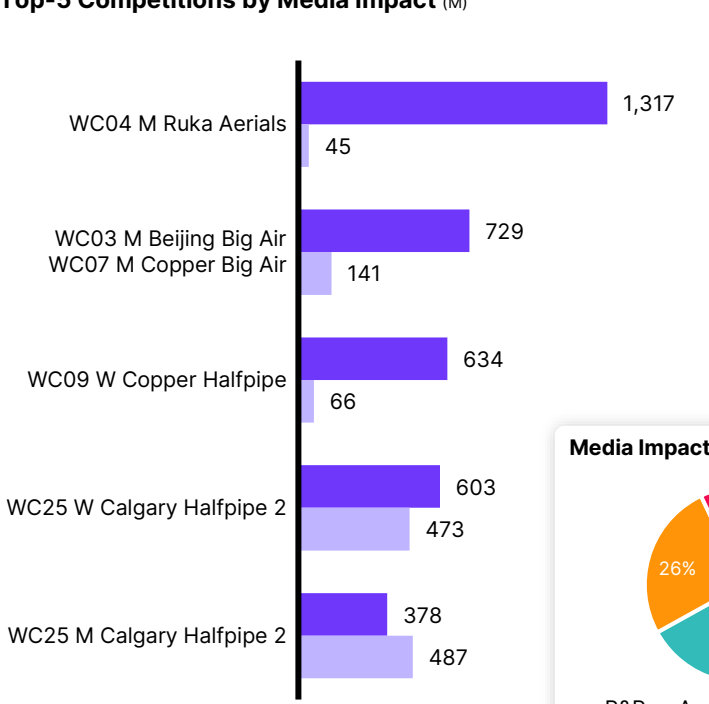
Management Summary

Key Insights

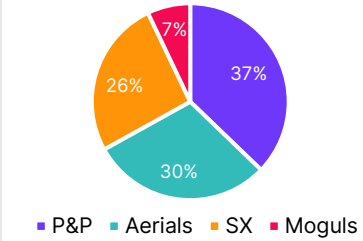
Key Takeaways

- Compared to the previous season, Cumulative Audience (+58%) and Media Impact (+96%) increase while Broadcast Time remains stable.
- Number of events increase from 83 to 105 (+27%).
- Thanks to the contribution of China (+232%), total media impact is the second highest in history and back on the level of the record 2021/22 Olympic season.
- Park & Pipe (+112%) and Aerials (+438%) competitions drive the positive overall development as they prove to be especially popular in China.
- China contributes 61% to the overall World Cup media impact while it accounts for 96% of the Aerials and 87% of the Park & Pipe media impact.
- Moguls (Italy 20% of the media impact, Japan 18%) and Ski Cross (Germany 37%, France 24%) are dominated by other markets and see a more balanced distribution.
- The Ruka Aerials event enjoyed presence in 101 programmes across China with a cum. audience of 48M.*
- For the Beijing Big Air event, it were 94 programmes across China with a cum. audience of 42M.*

Top-5 Competitions by Media Impact (M)



Media Impact by Discipline 23/24



*Men + Women, Beijing also incl. Qualification

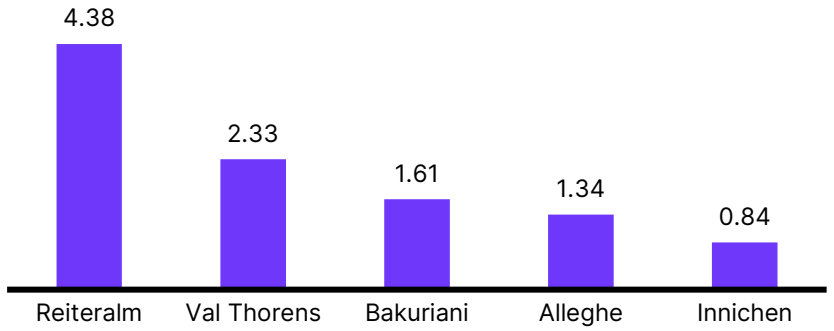
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Management Summary

Media Monitoring

Top 5 Venues by Cumulative Live Audience* (M)



- Reiteralm, hosting 2 Ski Cross events, ranks top in terms of live audience (up from 4th rank last year). German ARD covered both event days with a cum. live audience of 2.8M.
- All venues in the top-5 ranking hosted Ski Cross events. The 1.6M for Bakuriani are split into 1.3M for SX and 0.3M for the Moguls event.
- Germany, Switzerland and France rank top in terms live audience (each dominated by SX coverage), together accounting for 59% of the total.
- China ranks top in media impact (61% of the total). Since only a small proportion of coverage in China is live, the country does not appear high in the live audience rankings but generates most of its media impact with relives, highlights, and news.

Event Impressions by Market (M)

		No. of broadcasts
China	5,777	528
Germany	963	226
France	739	295
Italy	484	337
Switzerland	316	340
Sweden	285	357
Finland	221	279
Austria	170	349
Japan	129	270
Canada	126	206
USA	116	10
Norway	46	270
United Kingdom	24	163
Spain	17	166
South Korea	14	54
Slovenia	7	201

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

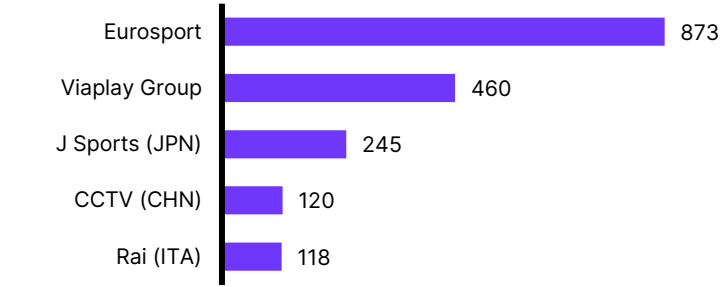
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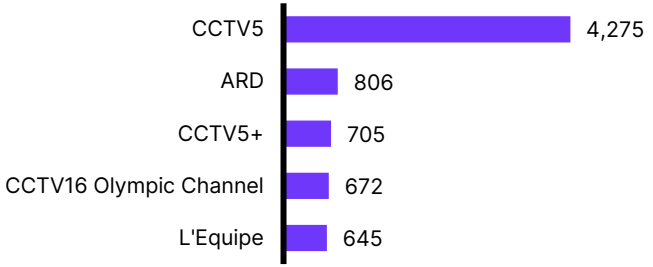
Management Summary

Media Monitoring

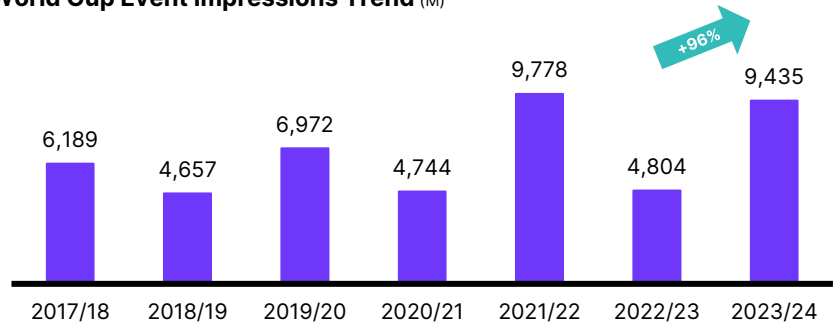
Top 5 Broadcasters by Broadcast Time (hours)



Top 5 Channels by Event Impressions (M)



World Cup Event Impressions Trend (M)



- With 873 hours of broadcast time, the various Eurosport feeds account for 40% of total coverage but only 1% of cumulative audience (4M) and 4% of event impressions (333M).
- In terms of media impact, CCTV5 leads the ranking again with 3.6 times the value compared to last season (1,192M).
- Aerials and Halfpipe events account for 84% of CCTV5's media impact with the Ruka event (Aerials) being the most popular one.
- While German public broadcaster ARD ranks 2nd in media impact, accounting for 9% of total numbers, fellow ZDF only comes in 25th (0.2% of the total).

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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	349	6.51	210:45:44	179:15:01	170.28
Canada	206	4.88	21:01:03	15:15:33	125.70
China	528	288.09	172:13:14	160:49:05	5,776.56
Finland	279	9.90	201:24:01	169:21:48	221.38
France	295	19.65	112:42:53	90:48:19	739.16
Germany	226	49.25	104:03:44	93:29:26	962.51
Italy	337	15.92	229:49:44	201:18:09	484.28
Japan	270	42.42	245:54:01	167:30:12	128.71
Norway	270	0.65	206:13:03	172:02:51	46.08

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

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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)
Slovenia	201	0.14	110:23:22	101:45:03	7.20
South Korea	54	0.19	33:01:42	31:23:54	14.38
Spain	166	2.49	85:42:56	78:55:48	17.39
Sweden	357	32.51	192:49:13	157:11:05	285.40
Switzerland	340	11.48	134:06:27	119:12:50	315.58
United Kingdom	163	0.48	91:24:10	83:00:21	24.33
USA	10	1.38	5:24:07	4:53:43	115.59
TOTAL	**4,051**	**485.93**	**2156:59:23**	**1826:13:09**	**9,434.54**

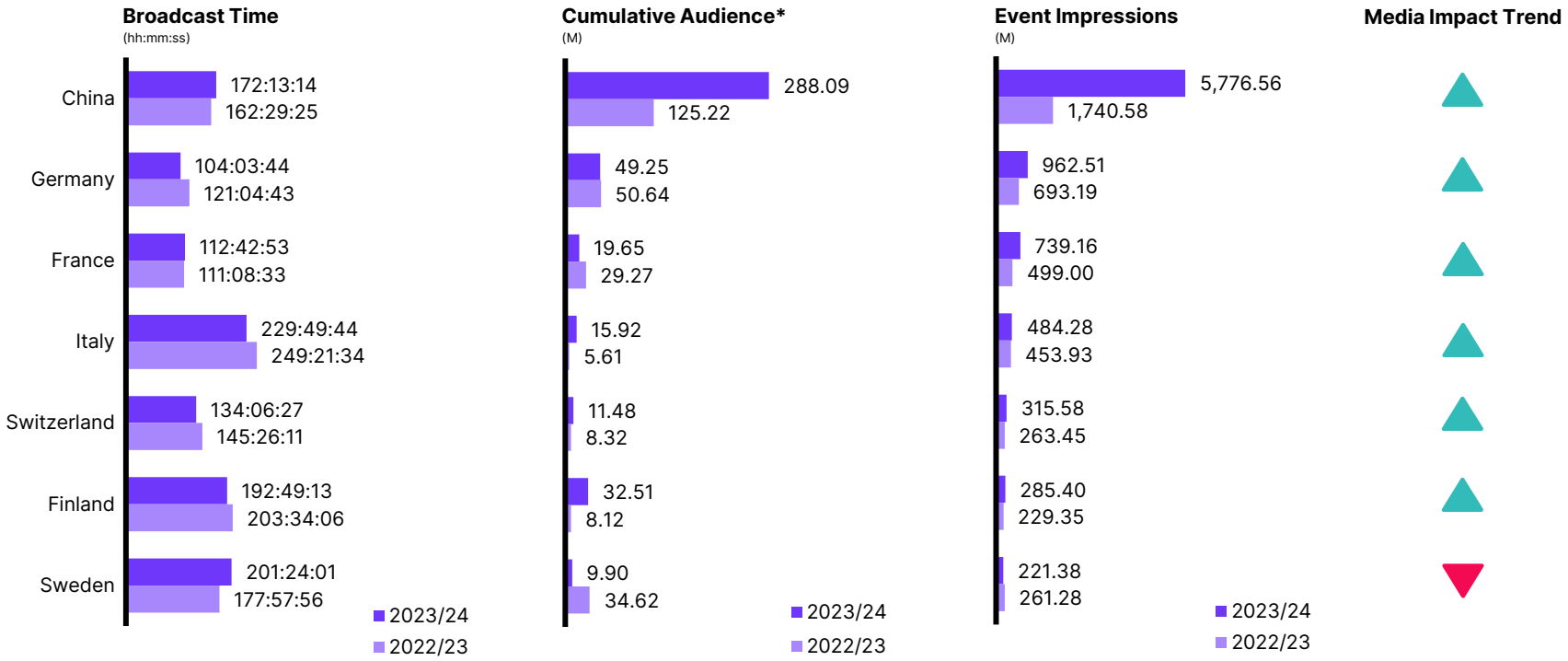
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Media Monitoring

Top 7 trending countries by Event Impressions 2023/24



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Media Monitoring

Ranking by trending country

	2023/24			2022/23		
Country	**Cumulative Audience*** (M)	**Broadcast Time** (hh:mm:ss)	**Event Impressions** (M)	**Cumulative Audience*** (M)	**Broadcast Time** (hh:mm:ss)	**Event Impressions** (M)
China	288.09	172:13:14	5,776.56	125.22	162:29:25	1,740.58
Germany	49.25	104:03:44	962.51	50.64	121:04:43	693.19
France	19.65	112:42:53	739.16	29.27	111:08:33	499.00
Italy	15.92	229:49:44	484.28	5.61	249:21:34	453.93
Switzerland	11.48	134:06:27	315.58	8.32	145:26:11	263.45
Sweden	32.51	192:49:13	285.40	34.62	177:57:56	229.35
Finland	9.90	201:24:01	221.38	8.12	203:34:06	261.28
Austria	6.51	210:45:44	170.28	6.69	184:15:53	144.70
Japan	42.42	245:54:01	128.71	27.64	213:21:31	123.18
Canada	4.88	21:01:03	125.70	3.66	51:35:37	108.12
USA	1.38	5:24:07	115.59	1.87	4:16:16	171.50
Norway	0.65	206:13:03	46.08	3.30	272:20:42	52.19
United Kingdom	0.48	91:24:10	24.33	0.33	66:20:50	24.38
Spain	2.49	85:42:56	17.39	2.83	103:31:44	33.92
South Korea	0.19	33:01:42	14.38	-	-	-
Slovenia	0.14	110:23:22	7.20	0.08	89:47:41	5.56
TOTAL	**485.93**	**2156:59:23**	**9,434.54**	**308.22**	**2156:32:40**	**4,804.34**

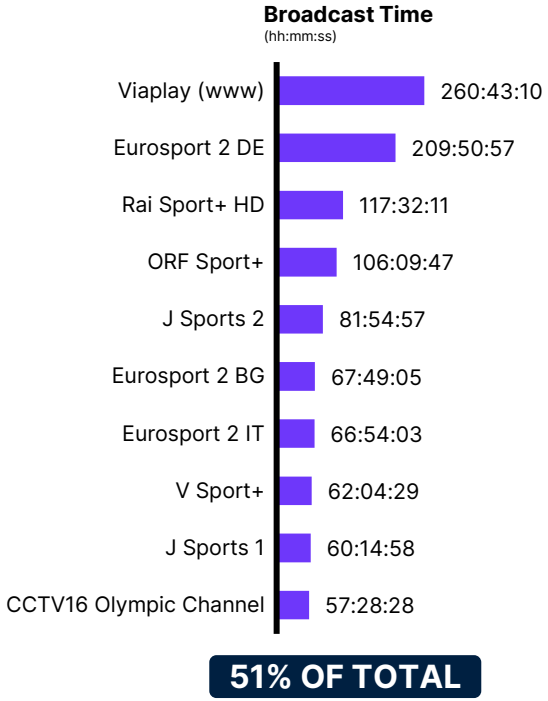
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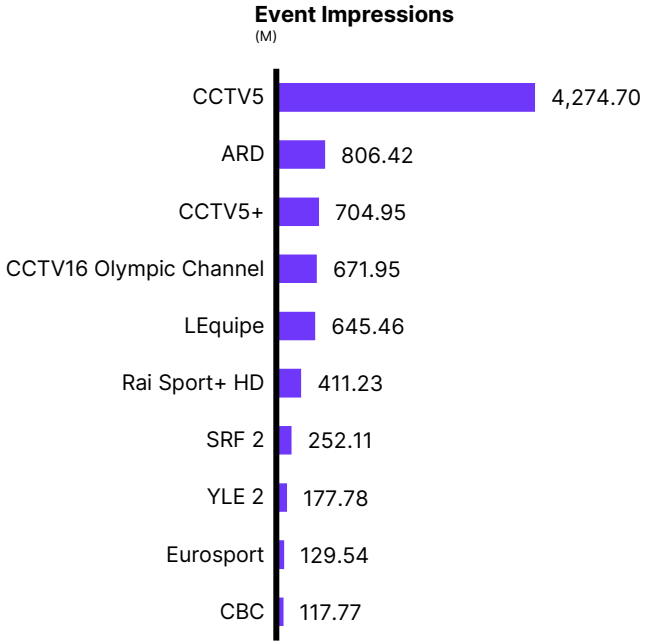
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Media Monitoring

Top 10 channels



51% OF TOTAL



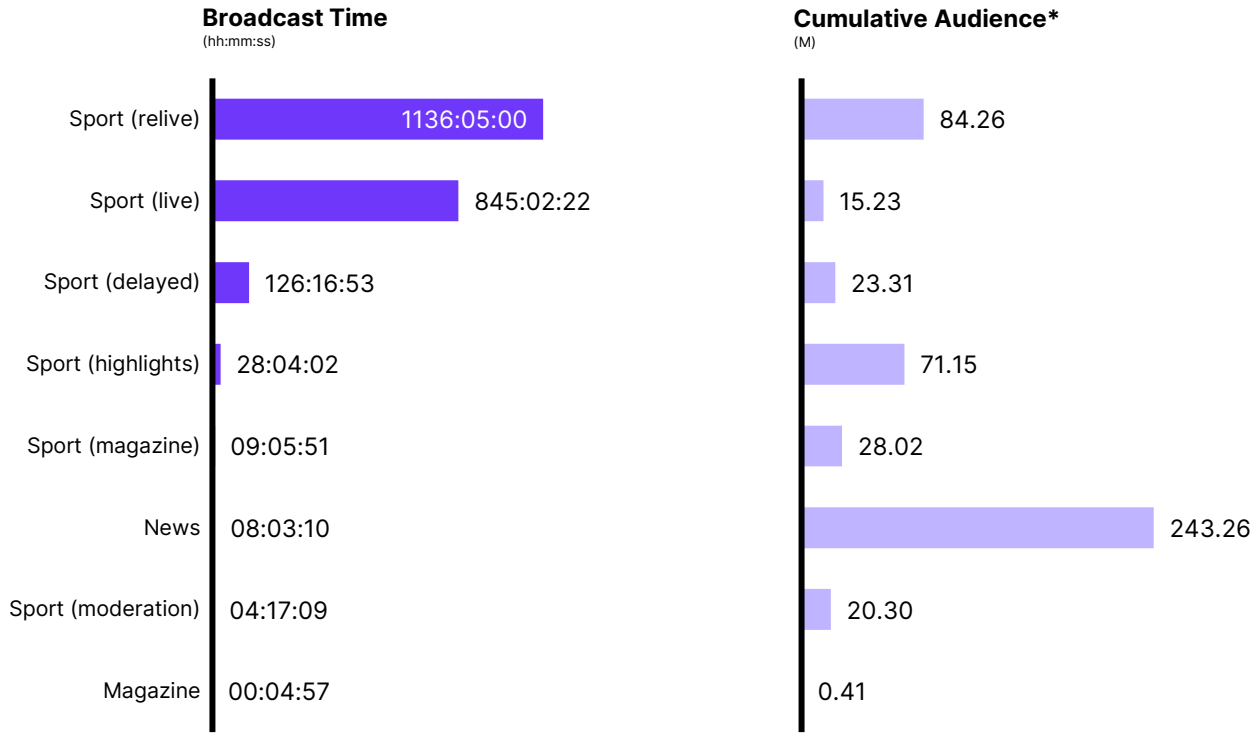
86% OF TOTAL

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Ranking by programme type

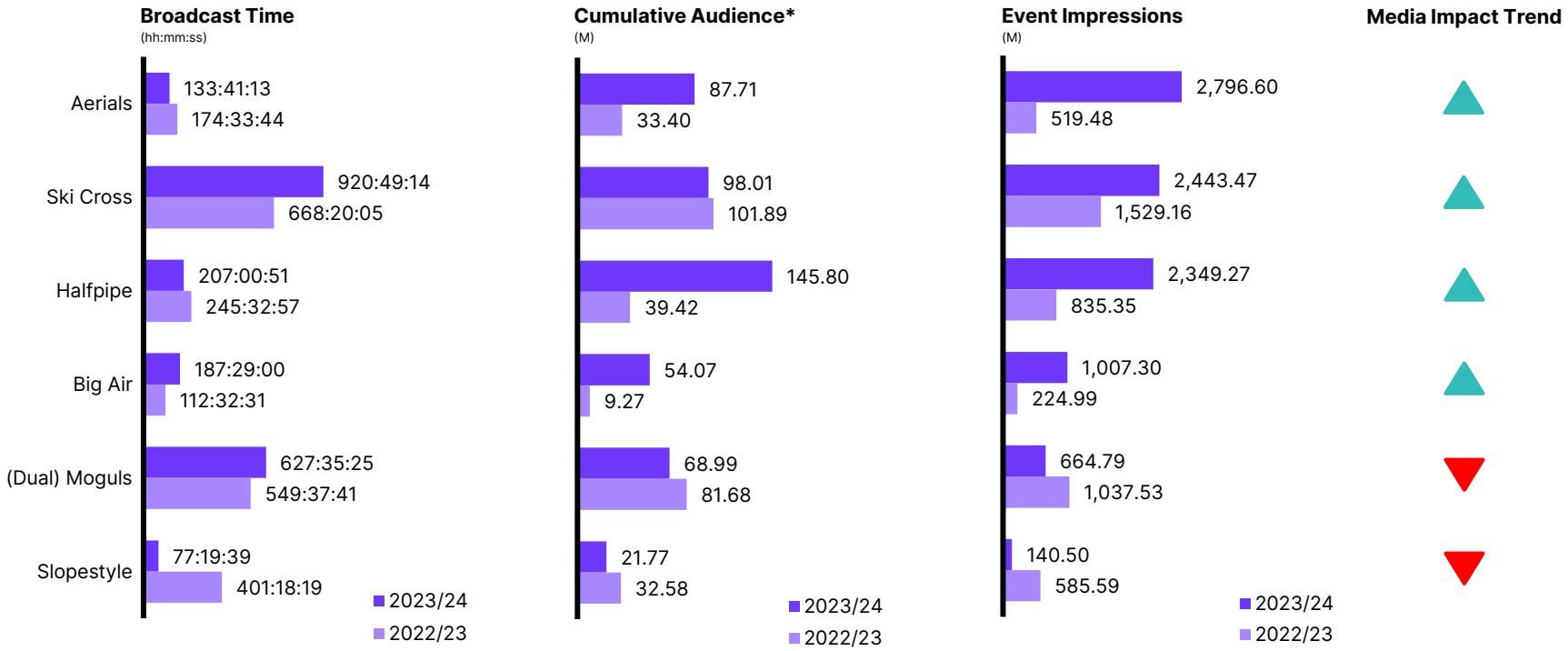


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Media Monitoring

Discipline YOY (ranked by event impressions 2023/24)



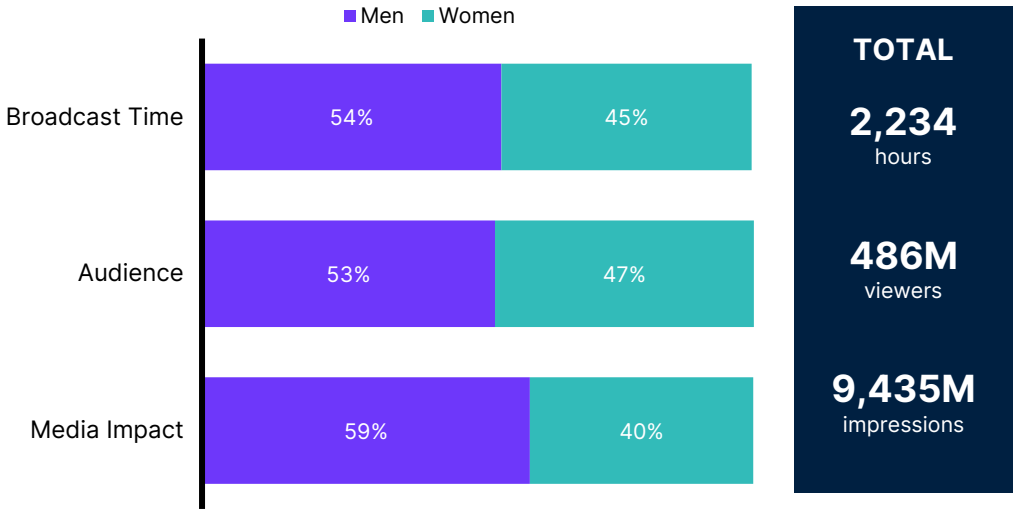
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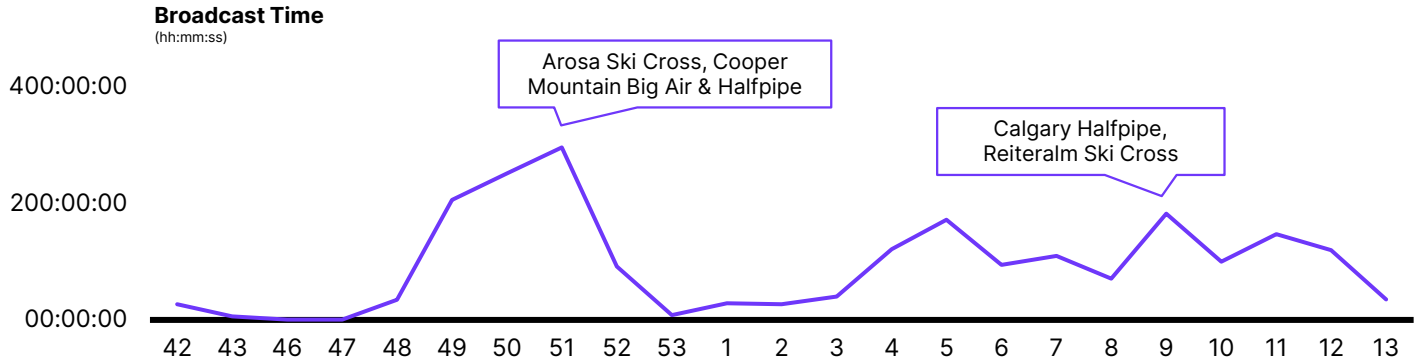
Gender comparison

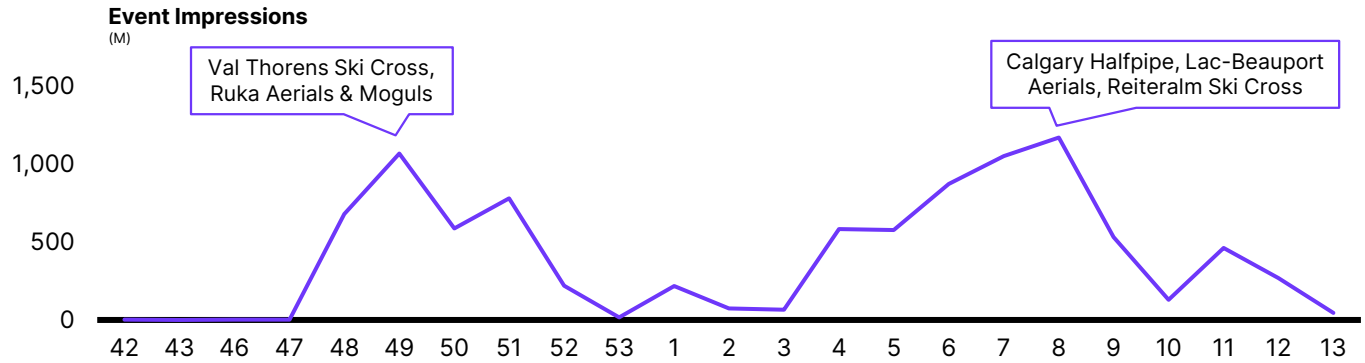


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Weekly coverage trend

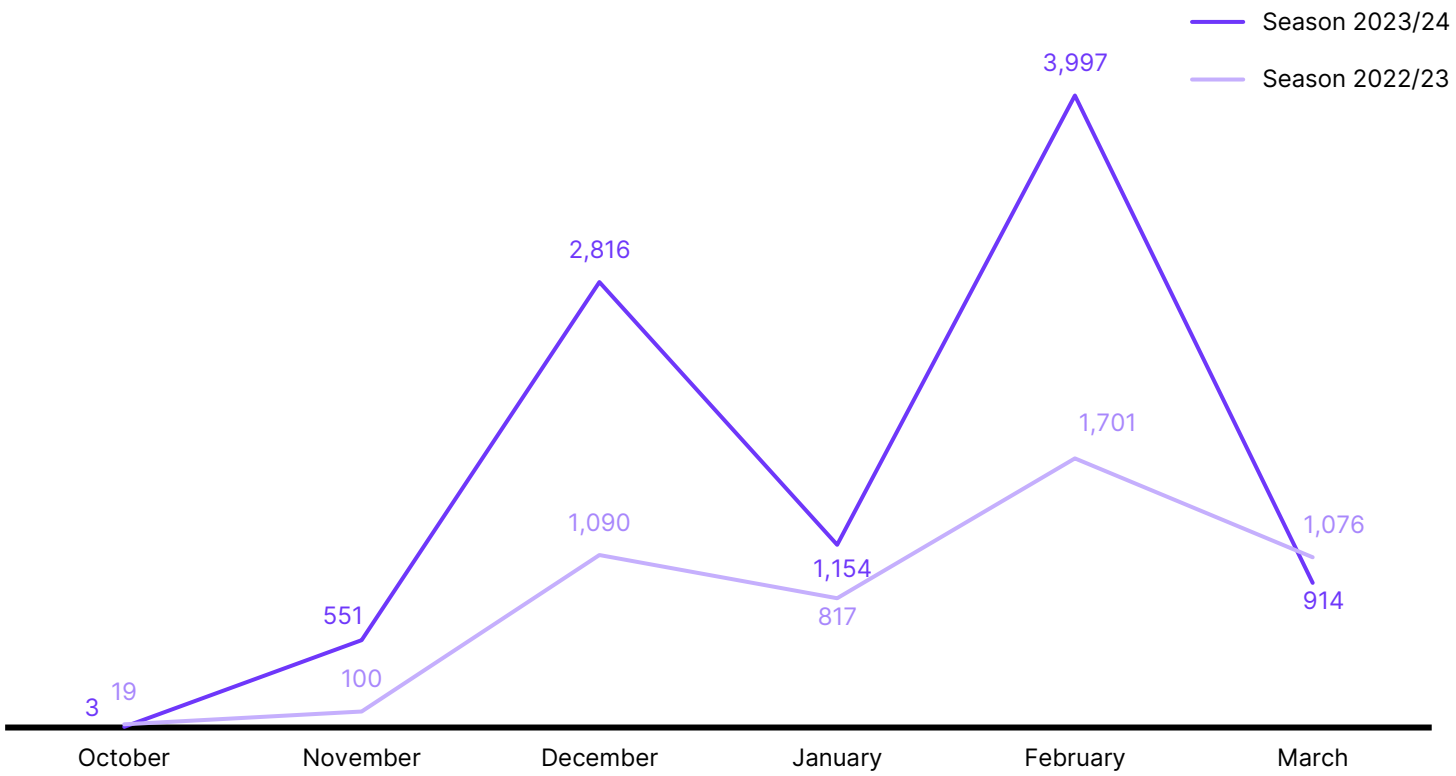




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Season Comparison by Event Impressions



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Methodology & Appendix

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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-broadcasing 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:

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

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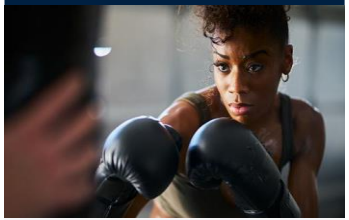
We provide brands and rights holders the knowledge to identify and connect with the audiences that matter most to them.



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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

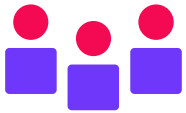


Nielsen applies a unique combination of advanced machine analysis and people-powered research to provide clients a clear picture of the sports media landscape.

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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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