



FIS Snowboard World Cup 2024/25

TV Media Evaluation – Event Summary



Expertise by Nielsen Sports
Your contacts: Alexander Karduck



Introduction

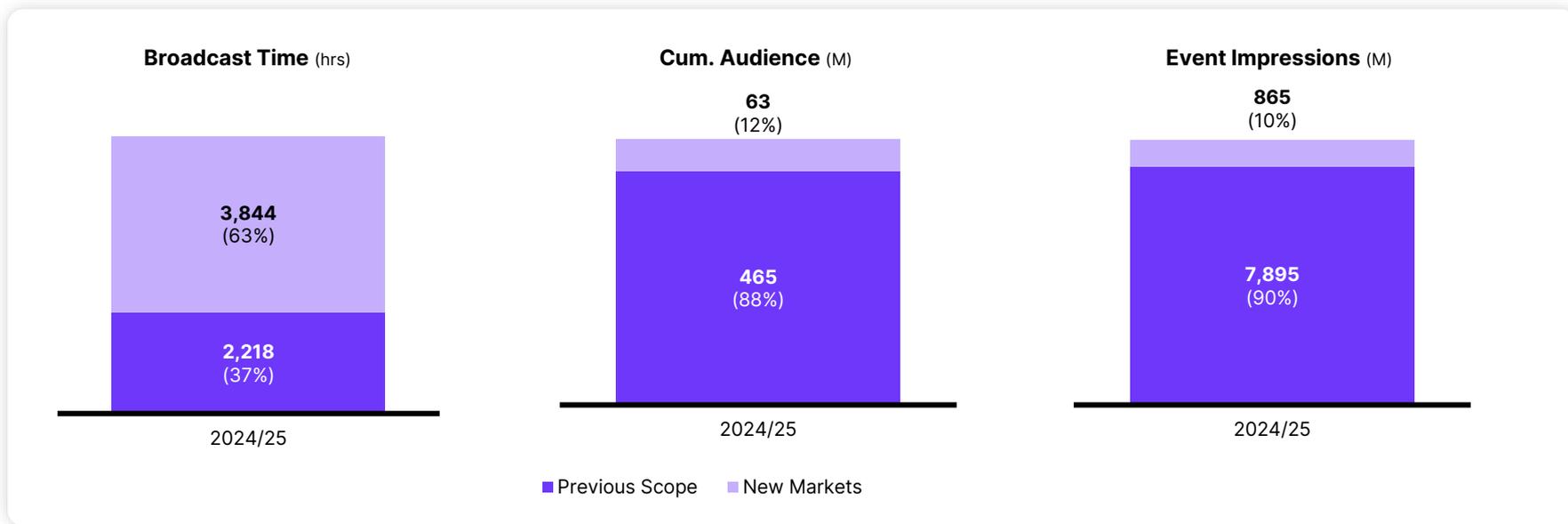
Study scope

Object of investigation/event:	FIS Snowboard World Cup (M/W)
Monitoring period:	2024-25 Season
Sponsors:	Swatch (Park & Pipe) Visa (SB Alpine)
Markets*:	Dedicated Coverage: Global broadcast partners Secondary Coverage: Austria, China, Czech Republic, Finland, France, Germany, Italy, Japan, Norway, Poland, Slovakia, Slovenia, Sweden, Switzerland, USA
TV program types:	Dedicated Coverage: Live, Delayed, Relive, Highlights Secondary Coverage: 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.

Changes in Study Scope

Impact of new markets in the media monitoring (extension from a pre-defined panel to all global rights holders)



New markets include:

- Markets previously only covered for selected disciplines (e.g. Bulgaria was only considered for Alpine Skiing)
- All European Eurosport territories previously not covered (e.g. Hungary, Turkey)
- Malaysia, Pan Asia (Eurosport Asia-Pacific), Pan Baltic (Go3 Sport), Pan-Latin America (Disney+)
- Streaming services (e.g. skiandsnowboard.live)

Management Summary

Global Overview

FIS Snowboard World Cup 2024/25

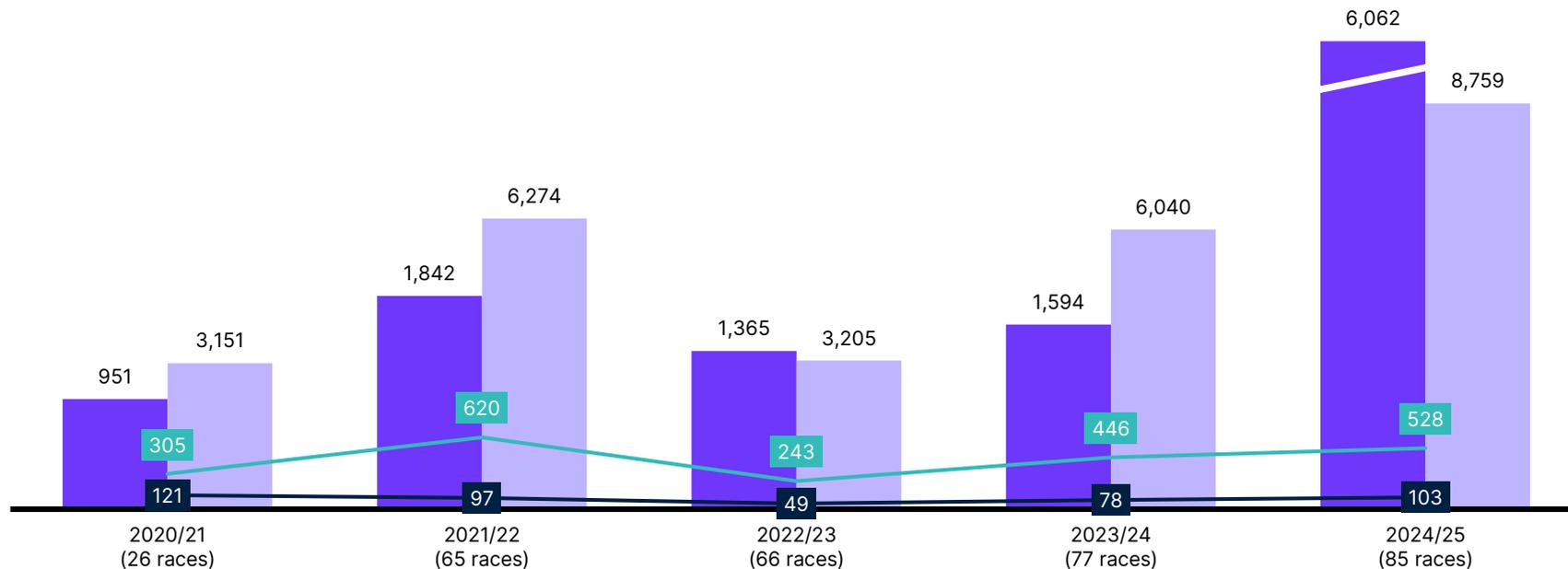
	Live	Non-Live	TOTAL	TOTAL 2023/24	TREND	
FIS Snowboard World Cup	Cumulative Audience (M)	43	485	528	446	+18%
	Number of Broadcasts (#)	2,355	8,291	10,646	2,816	+279%
	Broadcast Time (hrs)	2,119	3,943	6,062	1,594	+280%
	Actual Playing Time (hrs)	1,980	3,682	5,663	1,258	+350%
	Event Impressions (M)	3,122	5,637	8,759	6,040	+45%
Sponsorship Evaluation	Visibility (hrs)	395	826	1,221	55	+2120%
	Sponsorship Impressions (M)	779	1,050	1,892	280	+576%
	100% Media Equivalency (M€)	8.2	12.8	21.0	3.2	+556%
	QI Media Value (M€)	2.0	3.0	5.0	0.61	+720%
	Average Sequence Duration (sec.)	5.1	5.0	5.1	5.8	-12%
	Ratio Visibility/Broadcast Time (%)	18.6	20.9	20.1	7.3	+175%

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

Management Summary

Season Comparison

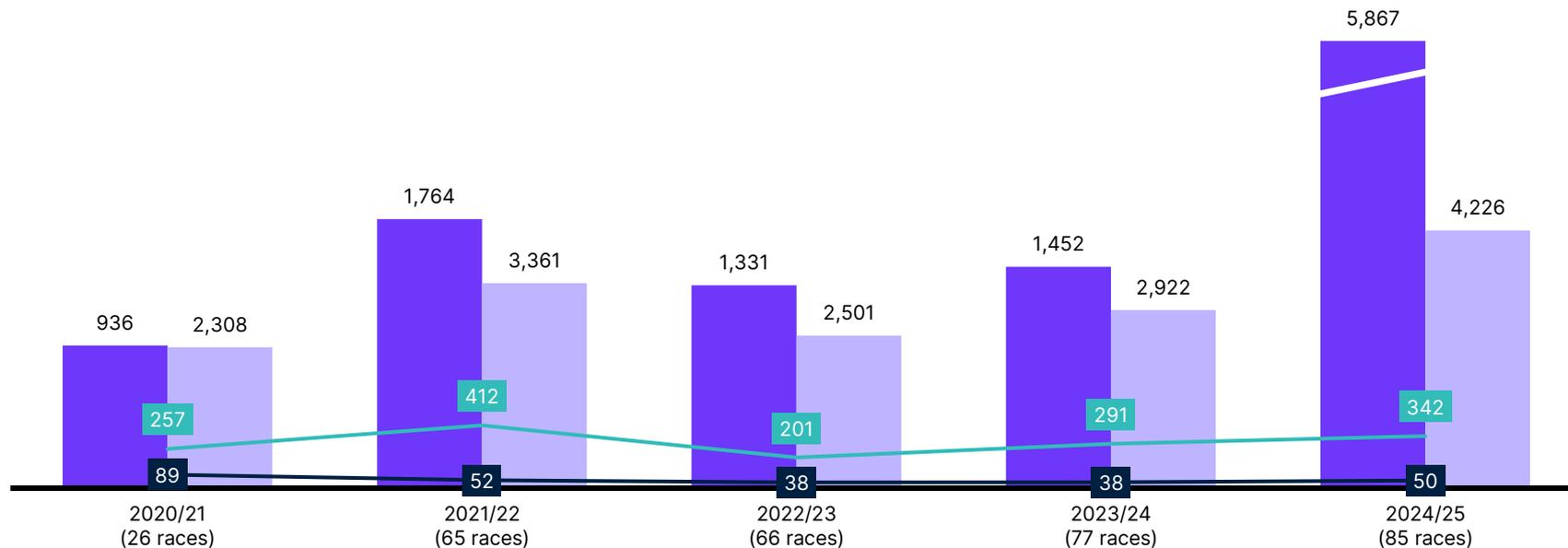
■ Broadcast Time (h) ■ Event Impressions (M) — Audience (M) — Ø Event Impressions per Race (M)



Management Summary

Season Comparison – excluding China

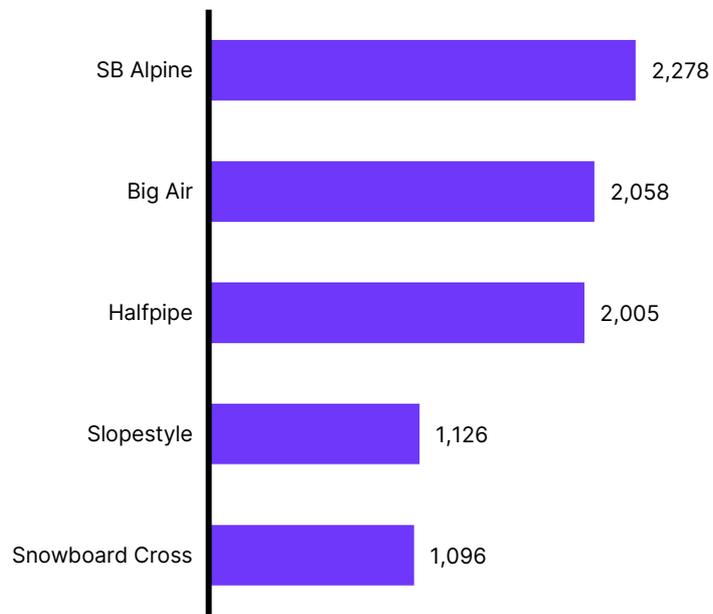
■ Broadcast Time (h) ■ Evenr Impressions (M) — Audience (M) — Ø Event Impressions per Race (M)



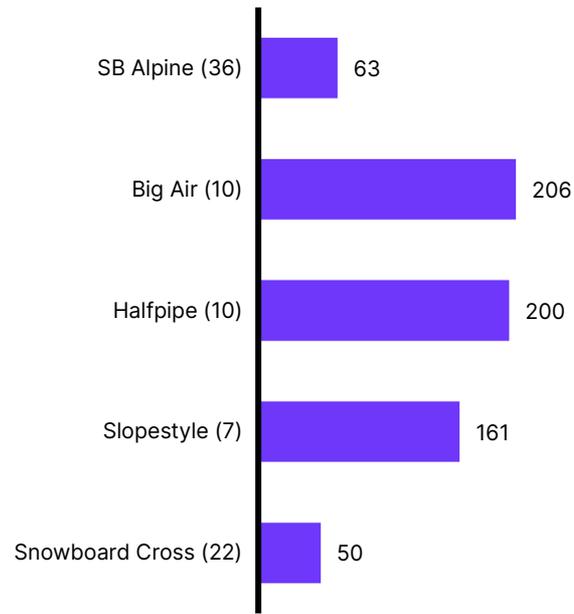
Management Summary

Event Ranking

Event Impressions (M)

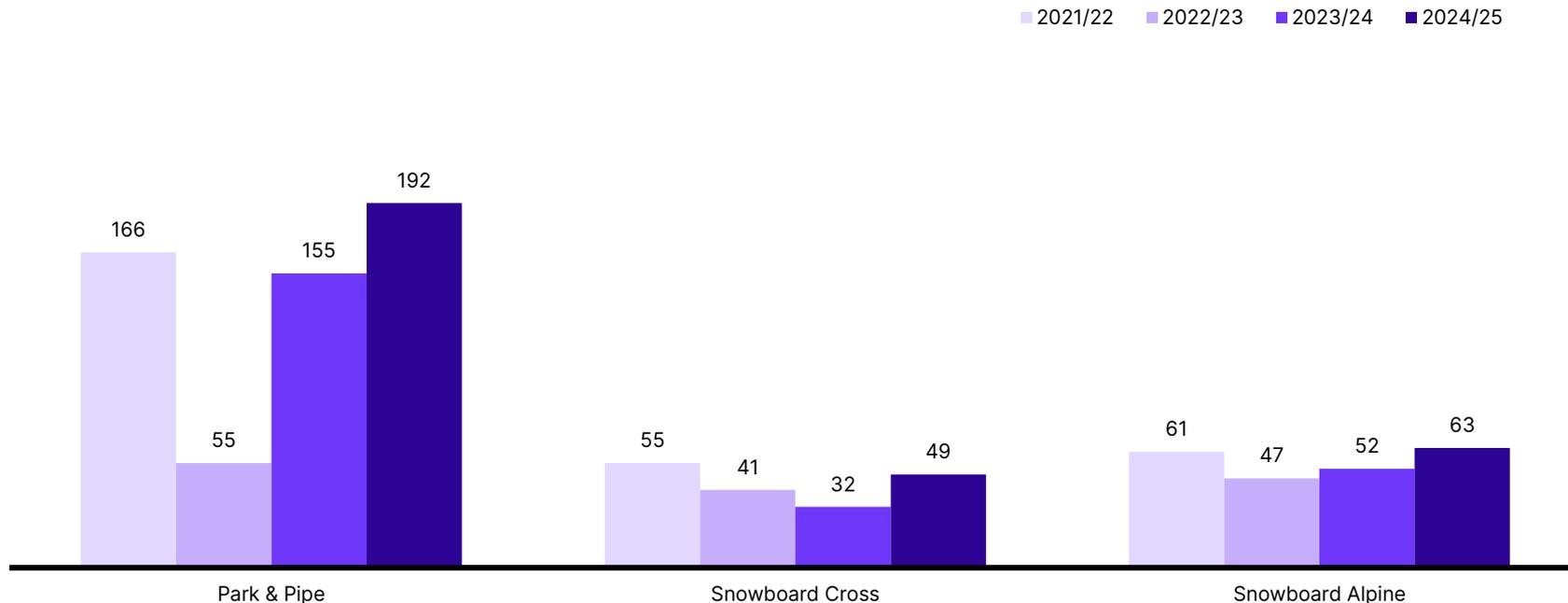


Ø Event Impressions per race (M)



Management Summary

Media Monitoring - Avg. Event Impressions (M) per Race & Discipline – Trend Chart



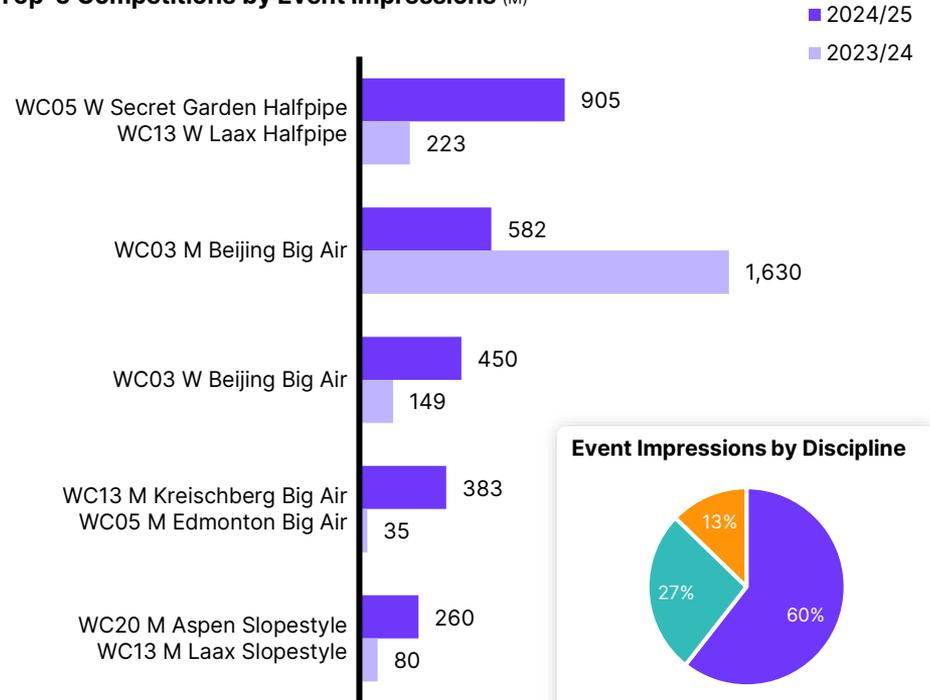
Management Summary

Key Takeaways

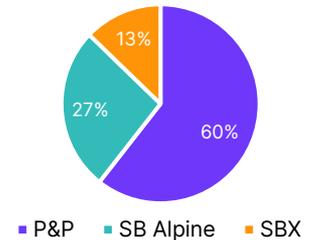
Key Takeaways

- For the second consecutive season, cumulative audience (+18%) and event impressions (+45%) increase.
- Number of competitions increase for the 4th time in a row, from 77 to 85 (+10%). Still, average event impressions per competition go up by even 31%.
- Thanks to the contribution of China (+45%), total event impressions reach an all-time high, even a quarter above the so-far record season 2021/22 (Beijing Olympics).
- Park & Pipe (+40%) competitions drive the positive overall development as they prove to be especially popular in China.
- China contributes 52% to the overall World Cup event impressions (last season: 52%) while it accounts for 79% of the Park & Pipe event impressions (last season: 85%).
- Chinese events* account for 35% of total event impressions.
- Besides P&P, SB Alpine (+63%) and SBX (+34%) also see positive event impressions trends.
- Germany is the top market for both SB Alpine (35%) and SBX (33%) event impressions, with the market also presenting a positive trend in terms of overall event impressions for all disciplines (+27%).

Top-5 Competitions by Event Impressions (M)



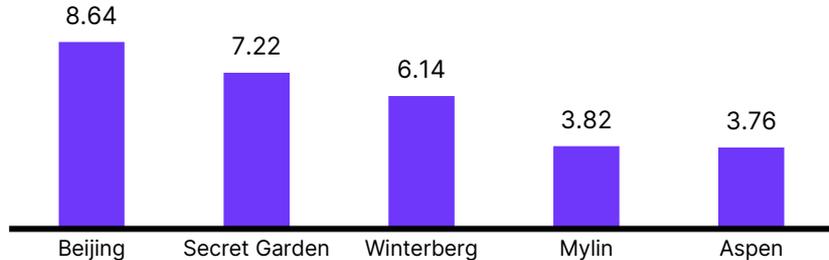
Event Impressions by Discipline



Management Summary

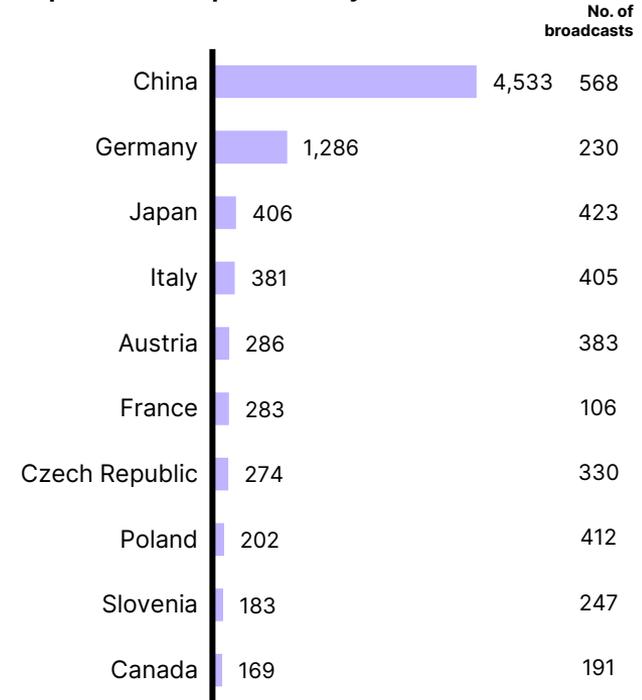
Media Monitoring

Top 5 Venues by Cumulative Live Audience (M)



- Live broadcasts of the P&P events in Beijing created the highest cumulative audience of all venues, with China accounting for 98% of the total live viewership for this World Cup.
- Thanks to China's contribution, Park & Pipe events drive the positive cumulative live audience trend, being responsible for 55% of the total (23M).
- When considering SB Alpine, the World Cup in Winterberg achieved the highest cumulative audience (3rd the overall ranking), with top 3 markets Germany, Slovenia and Austria being responsible for 96% of live viewership.
- Due to a very successful season, Japan overtakes three countries, landing on 3rd place in terms of event impressions. The market nearly doubles its media impact in comparison to the previous season.
- Poland and Czechia, newly added markets to the analysis scope, feature in the top-10 markets by media impact, together accounting for 6% of the total event impressions.

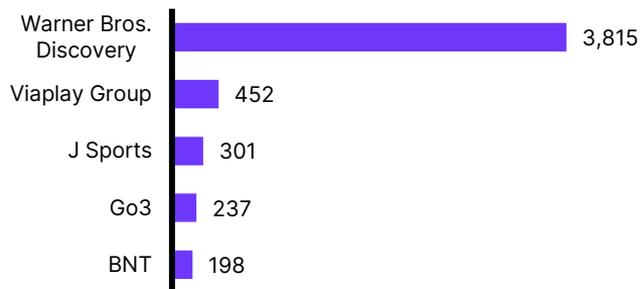
Top-10 Event Impressions by Market (M)



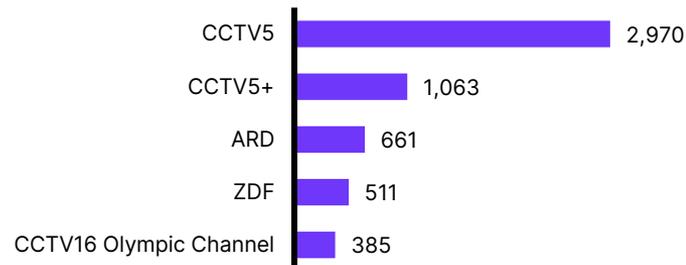
Management Summary

Media Monitoring

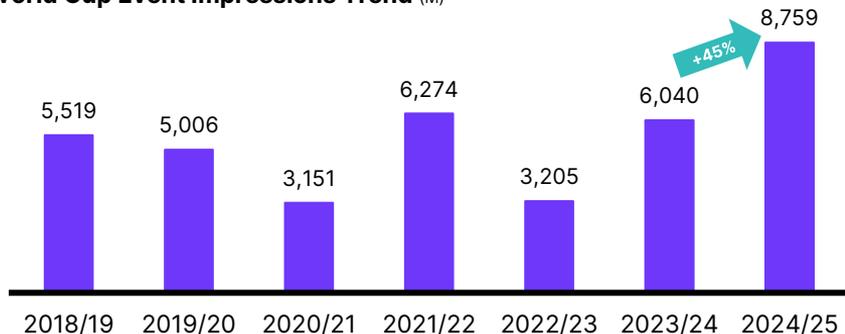
Top 5 Broadcasters by Broadcast Time (hours)



Top 5 Channels by Event Impressions (M)



World Cup Event Impressions Trend (M)



- With the Eurosport feeds being now accounted at a market level, the broadcaster WBD provided over 3,800 hours of coverage (63%), but only 1.5% of cumulative audience (7.8M) and 7% of event impressions (612M).
- With broad and wide-reaching coverage of the five home World Cups, the channel ranking by media impact is dominated by Chinese channels. Combined, the 3 channels generated 47% (+1.4bn) more event impressions than in 2023/24.
- With coverage of the domestic World Cup in Winterberg, German ZDF now occupy 4th place channel ranking (+68%).
- Streaming broadcasts – also new to the scope this season – account for 2% of the overall event impressions (166M), 0.3% of cumulative audience (1.3M) and 10% of broadcast time (585h).

Presentation of results

Media Monitoring

Media Monitoring

By country (in alphabetic order) – (1/4)

Country	Number of Broadcasts (#)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Actual Playing Time (hh:mm:ss)	Event Impressions (M)
Albania	173	0.08	89:20:15	84:51:25	6.28
Armenia	173	0.03	89:20:15	84:51:25	2.45
Austria	383	21.00	225:15:52	190:27:42	285.71
Azerbaijan	173	0.01	89:20:15	84:51:25	0.51
Belgium	351	0.30	191:32:19	181:57:18	23.39
Bosnia and Herzegovina	159	0.08	85:41:11	81:23:48	5.65
Bulgaria	482	1.30	287:07:46	272:44:35	67.44
Canada	191	2.74	132:52:52	126:14:08	169.17
China	568	185.28	195:34:06	185:43:38	4,533.24
Croatia	159	0.02	85:41:11	81:23:48	1.10
Cyprus	173	0.00	89:20:15	84:51:25	0.31
Czech Republic	330	31.94	163:49:11	142:39:19	273.81
Denmark	77	0.15	83:12:57	79:03:08	19.97
Estonia	159	0.04	85:41:11	81:23:48	2.99

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

Media Monitoring

By country (in alphabetic order) – (2/4)

Country	Number of Broadcasts (#)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Actual Playing Time (hh:mm:ss)	Event Impressions (M)
Finland	88	0.74	93:51:17	89:03:41	82.94
France	106	8.95	67:44:33	53:44:30	282.69
Georgia	173	0.05	89:20:15	84:51:25	3.66
Germany	230	97.08	98:00:38	90:09:37	1,285.99
Greece	173	0.03	89:20:15	84:51:25	2.36
Hungary	173	0.16	88:09:36	83:44:20	10.77
Iceland	173	0.00	89:20:15	84:51:25	0.08
Ireland	89	0.01	55:25:38	52:39:00	0.86
Israel	173	0.08	89:20:15	84:51:25	5.91
Italy	405	24.71	255:27:33	213:35:18	380.89
Japan	423	108.61	303:57:30	287:08:30	406.39
Kazakhstan	173	0.20	89:20:15	84:51:25	14.69
Kosovo	159	0.04	85:41:11	81:23:48	2.61
Kyrgyzstan	173	0.07	89:20:15	84:51:25	4.90

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

Media Monitoring

By country (in alphabetic order) – (3/4)

Country	Number of Broadcasts (#)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Actual Playing Time (hh:mm:ss)	Event Impressions (M)
Latvia	159	0.05	85:41:11	81:23:48	3.39
Lithuania	159	0.06	85:41:11	81:23:48	4.22
Malaysia	171	0.00	84:08:32	79:56:09	0.12
Malta	177	0.01	98:56:10	93:59:04	0.58
Moldova	175	0.04	90:29:23	85:57:11	3.03
Montenegro	159	0.04	85:41:11	81:23:48	2.84
Netherlands	229	0.32	113:25:11	107:45:01	16.87
North Macedonia	159	0.04	85:41:11	81:23:48	3.01
Norway	180	0.49	197:29:01	187:18:05	41.77
Pan-Asia	56	0.18	28:53:02	27:26:25	12.56
Pan-Baltic	195	0.37	236:31:52	224:41:44	61.50
Pan-Latin America	70	0.15	60:43:05	56:28:00	15.57
Poland	412	25.49	205:31:51	191:46:22	201.87
Portugal	201	0.21	125:34:28	119:17:23	16.48

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

Media Monitoring

By country (in alphabetic order) – (4/4)

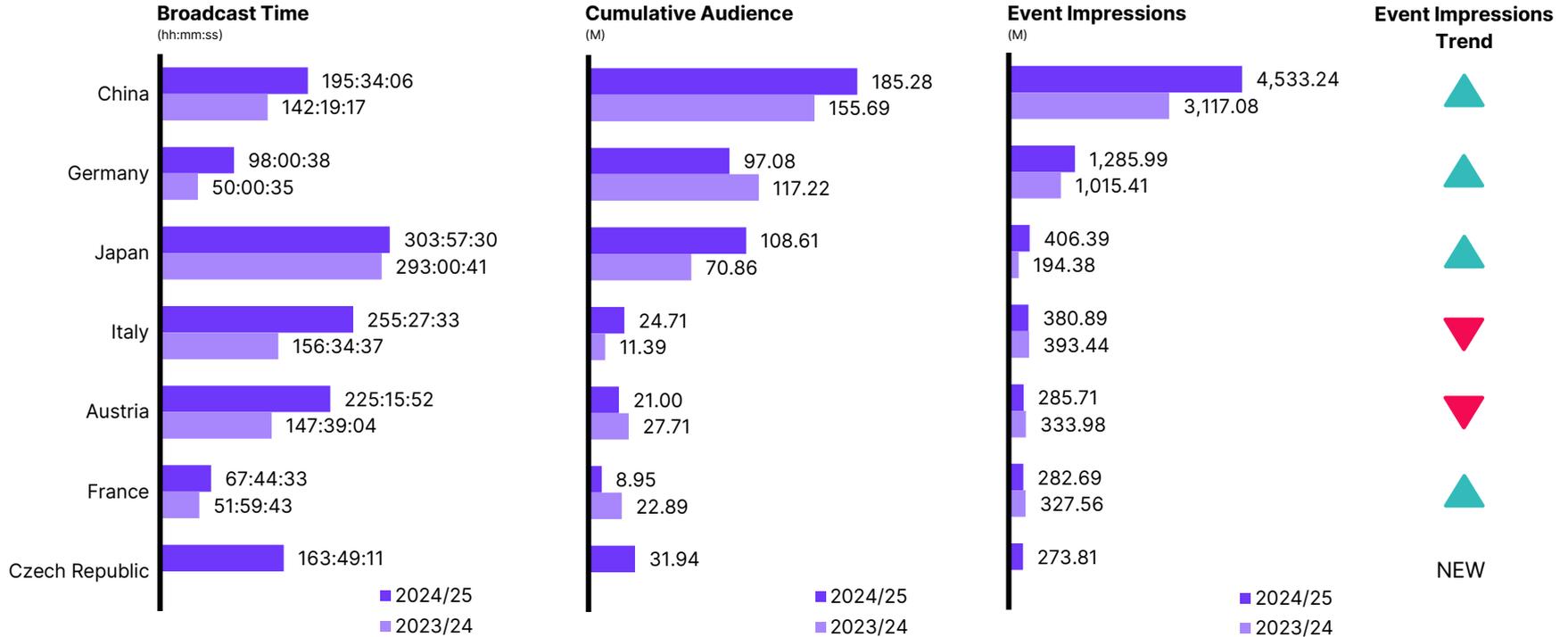
Country	Number of Broadcasts (#)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Actual Playing Time (hh:mm:ss)	Event Impressions (M)
Romania	175	0.52	90:29:23	85:57:11	38.05
Serbia	159	0.24	85:41:11	81:23:48	17.39
Slovakia	281	0.86	110:22:51	104:46:52	10.67
Slovenia	247	8.54	106:13:03	95:47:02	183.06
Spain	160	0.18	86:59:55	82:38:20	14.63
Sweden	95	0.48	86:58:24	81:54:18	40.97
Switzerland	209	4.14	98:30:40	91:02:58	102.50
Turkey	173	0.28	89:20:15	84:51:25	21.77
Ukraine	173	0.03	89:20:15	84:51:25	2.08
United Kingdom	133	0.35	97:16:59	92:24:35	28.58
USA	77	1.03	58:46:15	54:23:42	39.19
TOTAL	10,646	527.78	6062:35:29	5663:16:15	8,759.46

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

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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

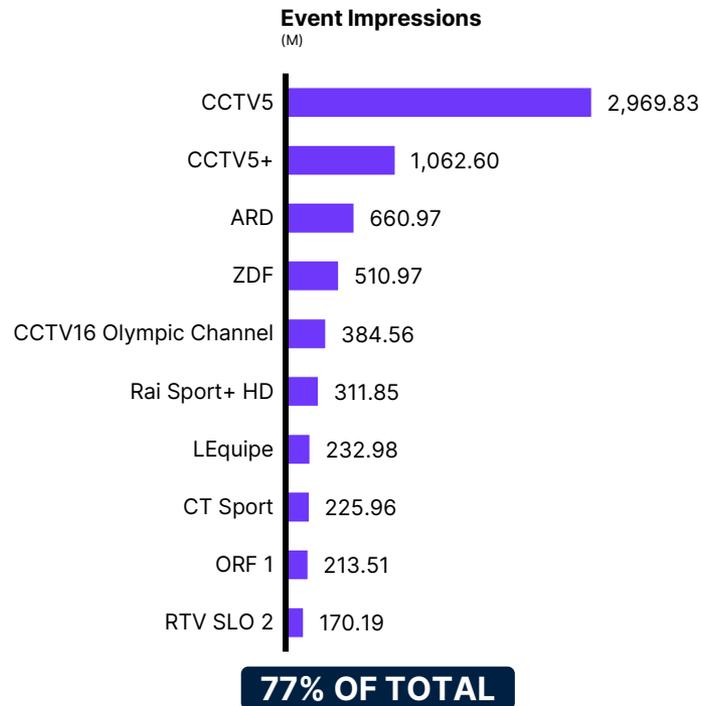
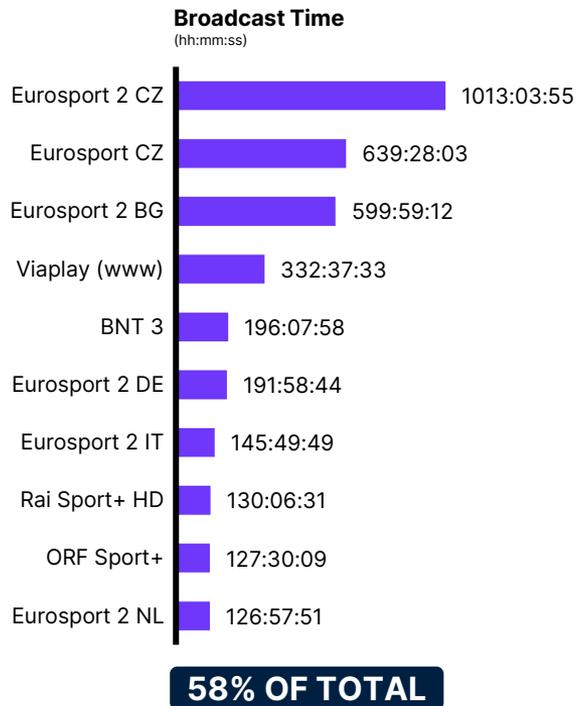
Top-15 markets by Event Impressions

Country	2024/25			2023/24		
	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Event Impressions (M)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Event Impressions (M)
China	185.28	195:34:06	4,533.24	155.69	142:19:17	3,117.08
Germany	97.08	98:00:38	1,285.99	117.22	50:00:35	1,015.41
Japan	108.61	303:57:30	406.39	70.86	293:00:41	194.38
Italy	24.71	255:27:33	380.89	11.39	156:34:37	393.44
Austria	21.00	225:15:52	285.71	27.71	147:39:04	333.98
France	8.95	67:44:33	282.69	22.89	51:59:43	327.56
Czech Republic	31.94	163:49:11	273.81	-	-	-
Poland	25.49	205:31:51	201.87	-	-	-
Slovenia	8.54	106:13:03	183.06	7.59	59:24:14	191.85
Canada	2.74	132:52:52	169.17	1.81	7:37:56	38.73
Switzerland	4.14	98:30:40	102.50	4.25	65:02:27	94.04
Finland	0.74	93:51:17	82.94	1.87	116:23:34	66.49
Bulgaria	1.30	287:07:46	67.44	-	-	-
Pan-Baltic	0.37	236:31:52	61.50	-	-	-
Norway	0.49	197:29:01	41.77	0.49	142:16:44	33.41
TOTAL	521.38	2667:57:46	8,358.96	421.75	1232:18:52	5,806.34

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

Media Monitoring

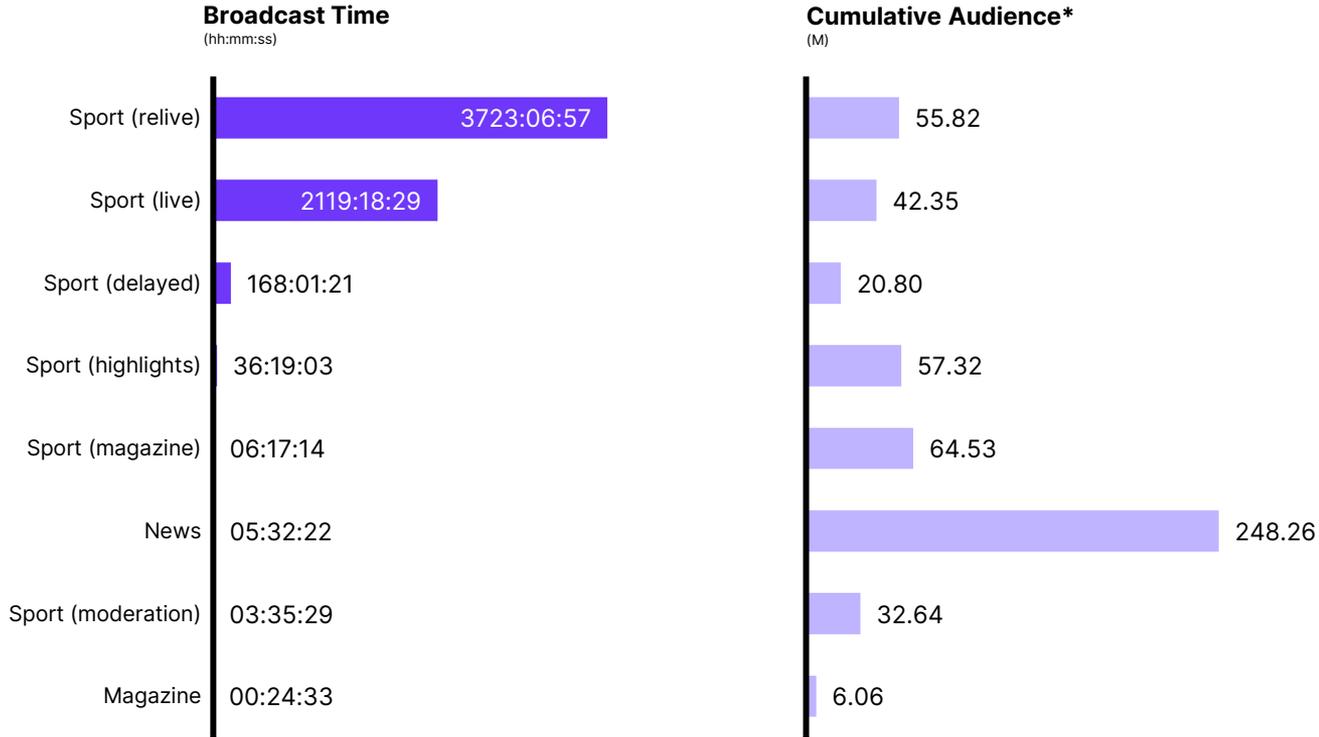
Top 10 channels



Eurosport CZ not only covers Czechia but represents a total of 28 markets

Media Monitoring

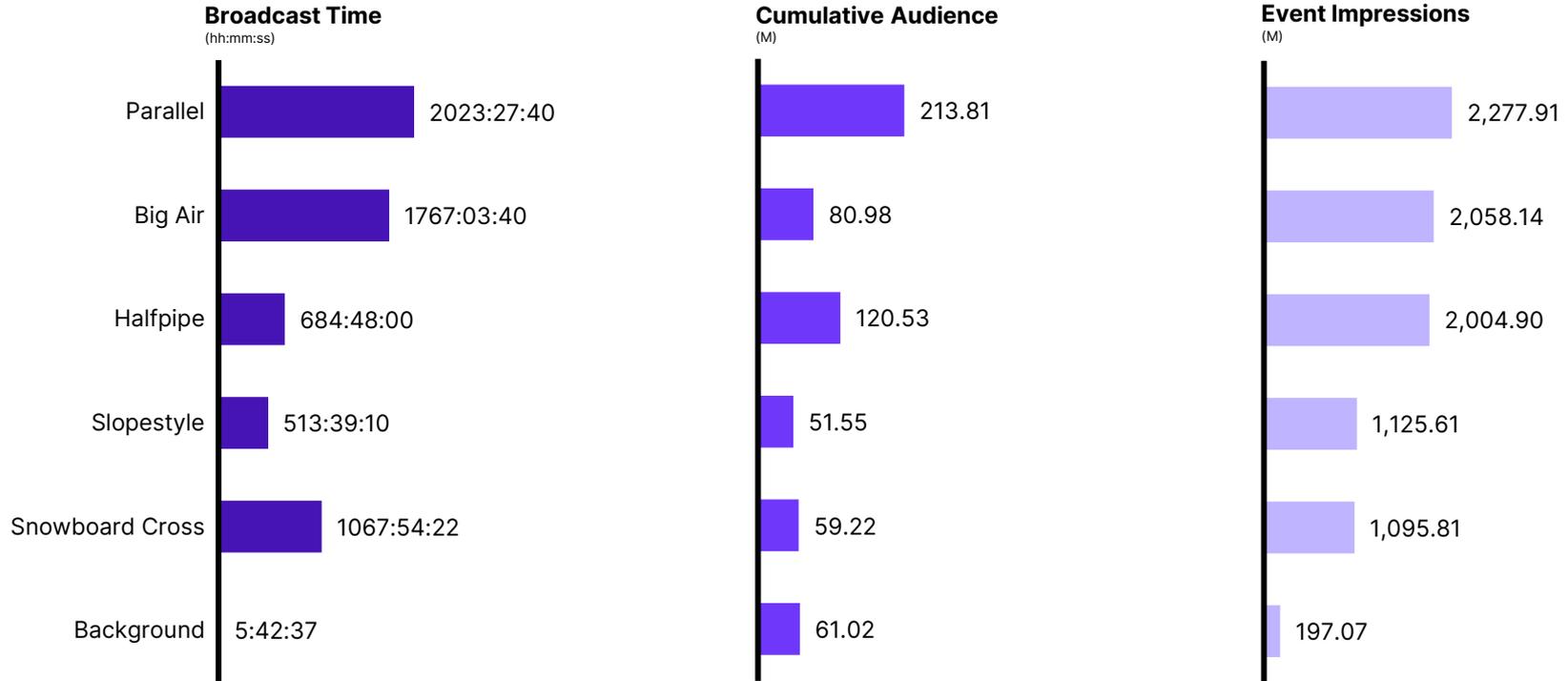
Ranking by program type



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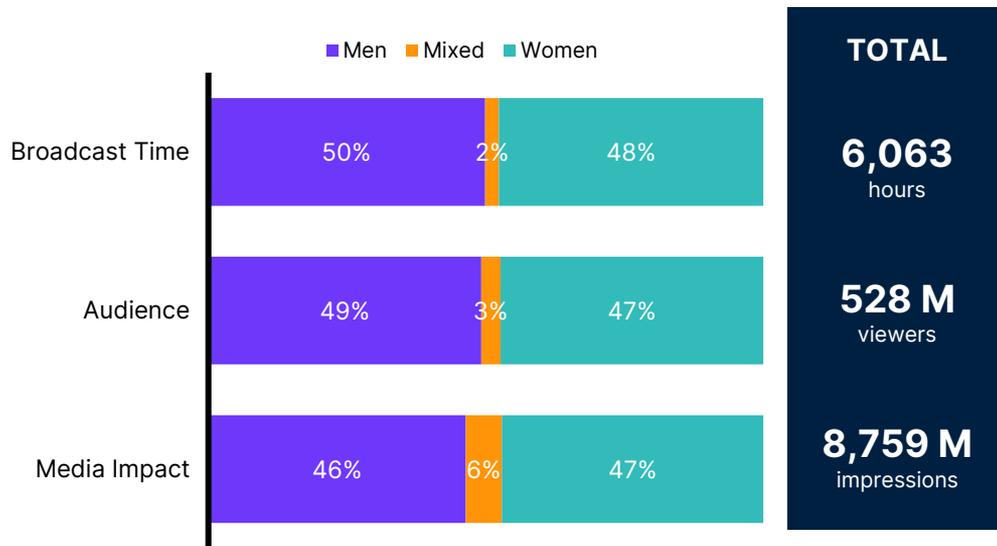
Media Monitoring

Discipline ranking by Event Impressions



Media Monitoring

Gender comparison

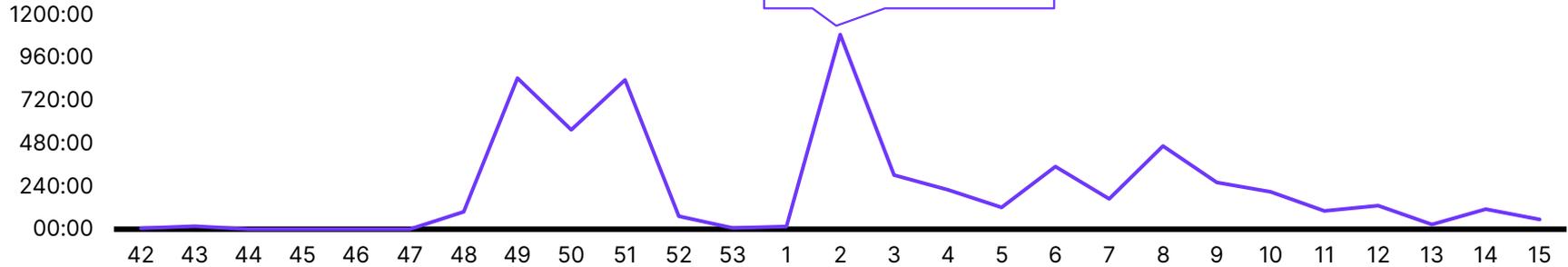


Media Monitoring

Weekly coverage trend

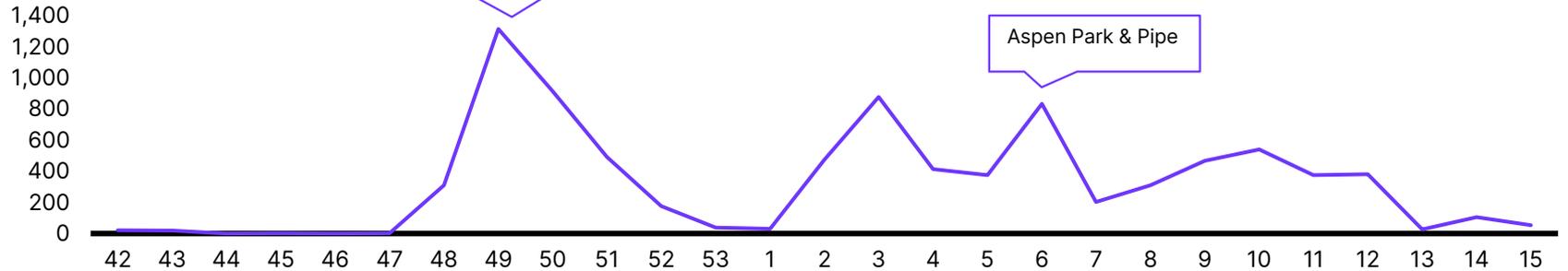
Broadcast Time

(hh:mm)



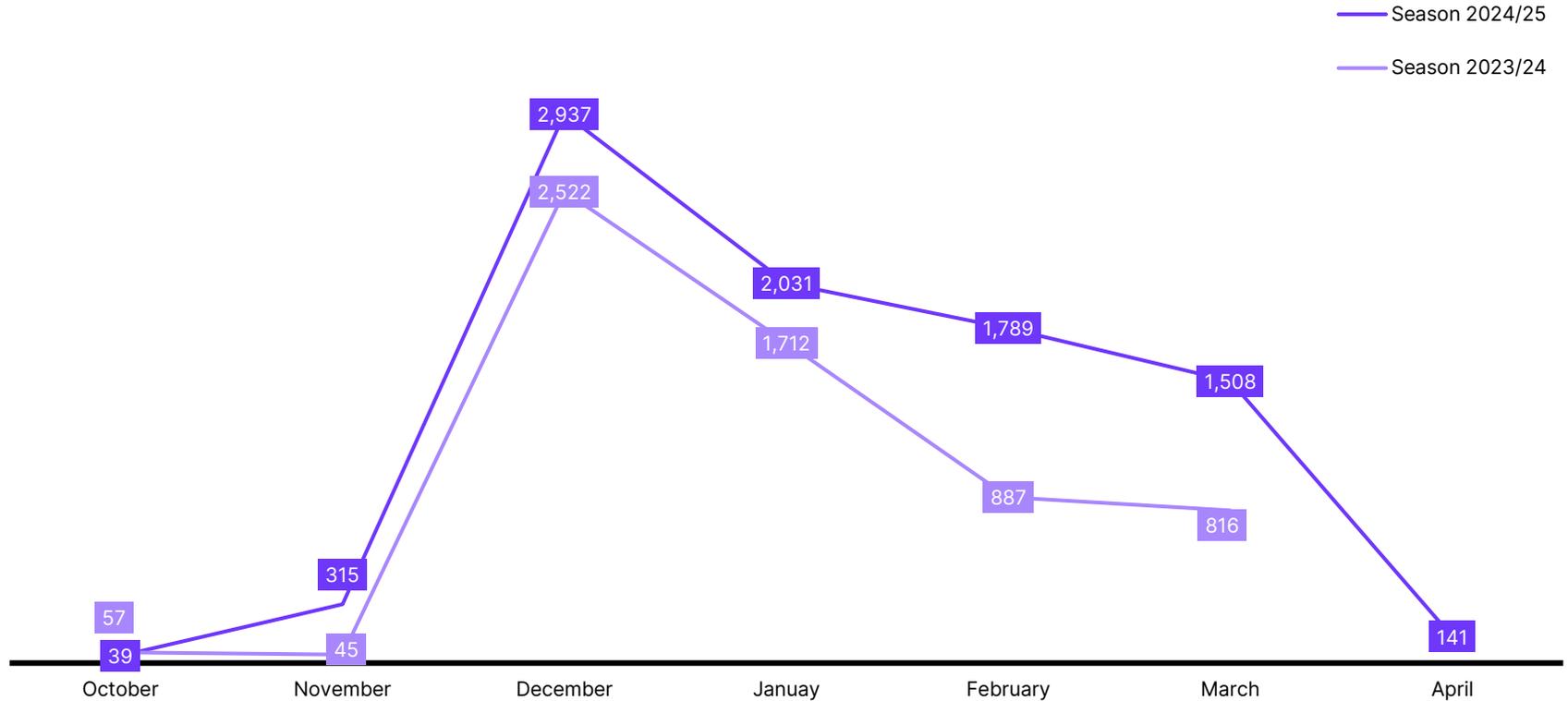
Event Impressions

(M)



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:

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



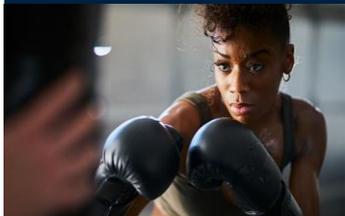
Nielsen Sports is the global leader in sports media valuation, data intelligence and research consulting.

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.

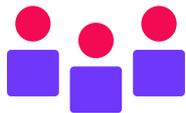
Innovative



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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