



Viessmann FIS Nordic Combined World Cup 2023/24

TV Media Evaluation – Event Summary



Expertise by Nielsen Sports
Your contacts: Alexander Karduck



Introduction

Study scope

Object of investigation/event:	FIS Nordic Combined World Cup 2022/23 (Men, Women and Mixed)
Monitoring period:	2023/24 Season
Sponsors:	Viessmann, FIS App
Markets*:	Austria, Finland, France, Germany, Italy, Japan, Norway, 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 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

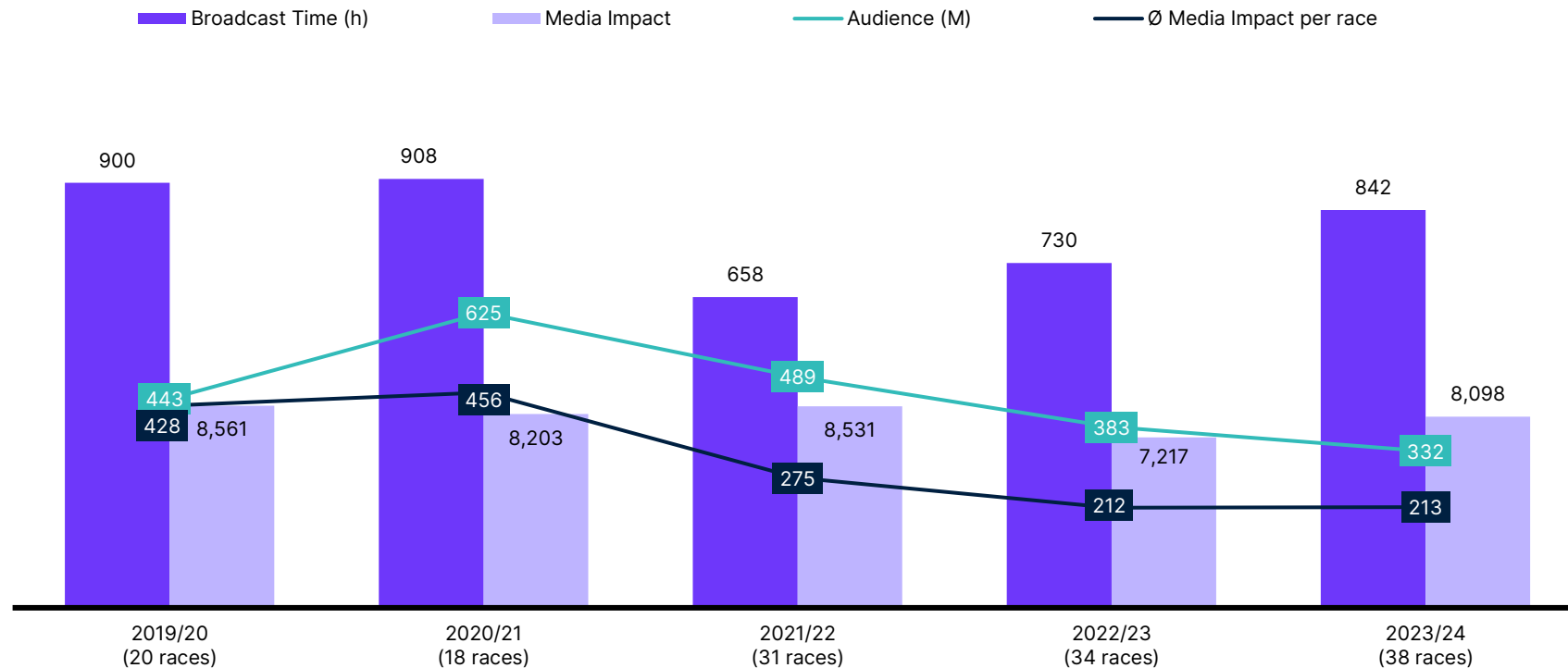
FIS Nordic Combined World Cup 2023/24 – Men, Women & Mixed

	Live	Non-Live	TOTAL	TOTAL 2022/23	TREND	
FIS Nordic Combined WC	Cumulative Audience* (M)	88	244	332	383	-12%
	Number of Broadcasts (#)	652	1,008	1,660	1,554	+7%
	Broadcast Time (hrs)	480	362	842	731	+15%
	Actual Playing Time (hrs)	389	276	665	584	+14%
	Event Impressions (M)	5,736	2,362	8,098	7,217	+12%
Sponsorship Evaluation	Visibility (hrs)	276	193	469	413	+15%
	Sponsorship Impressions (M)	3,784	1,359	5,143	4,120	+25%
	100% Media Equivalency (M€)	47.6	16.4	64.0	56.4	+14%
	QI Media Value (M€)	8.5	3.0	11.5	10.4	+11%
	Average Sequence Duration (sec.)	5.7	5.8	5.8	5.7	+2%
	Ratio Visibility/Broadcast Time (%)	57.6	53.3	55.8	56.5	-1%

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

Season Comparison

FIS Nordic Combined World Cup – Men, Women* & Mixed



*starting with the 2020/21 season; since the 2021/22 season also including mixed competitions

Global Overview

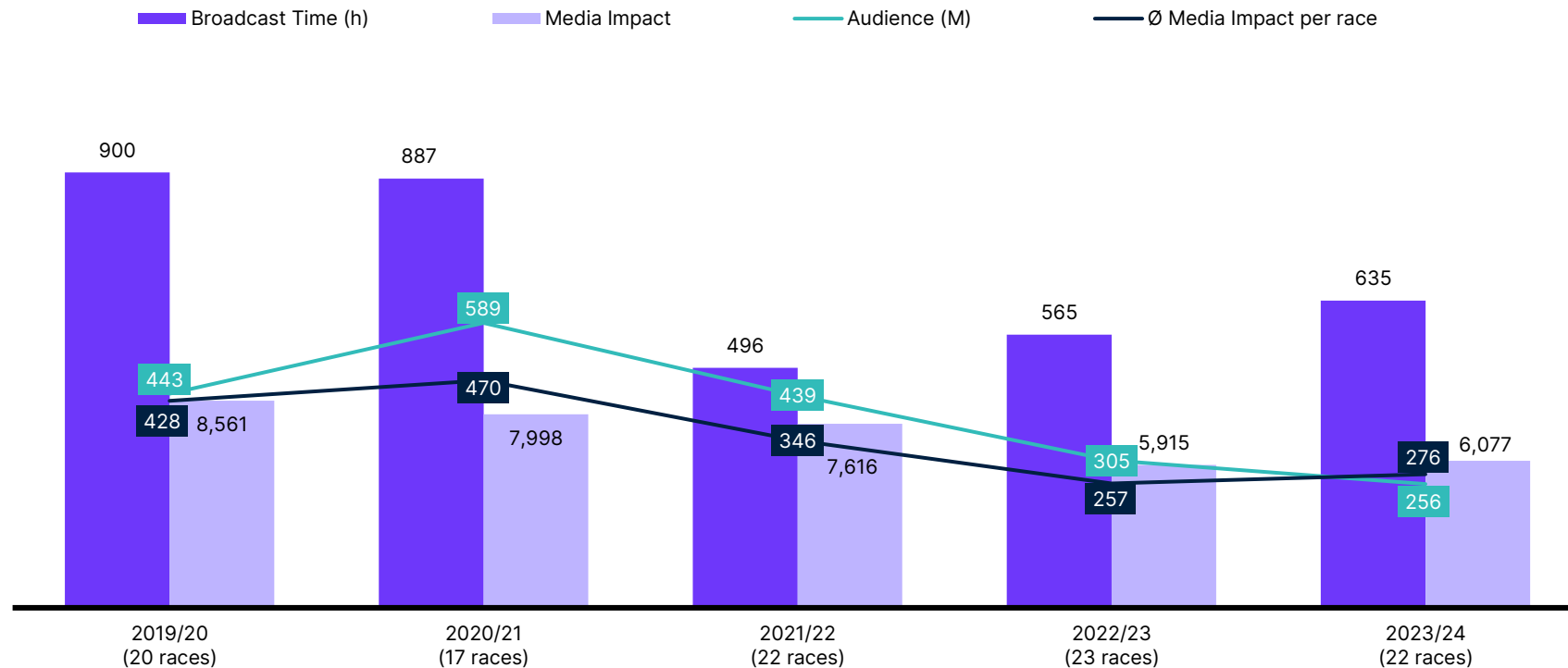
FIS Nordic Combined World Cup 2023/24 – Men

	Live	Non-Live	TOTAL	TOTAL 2022/23	TREND	
FIS Nordic Combined WC	Cumulative Audience* (M)	65	191	256	306	-16%
	Number of Broadcasts (#)	406	793	1,199	1,195	+0%
	Broadcast Time (hrs)	330	305	635	565	+12%
	Actual Playing Time (hrs)	264	230	494	450	+10%
	Event Impressions (M)	4,582	1,495	6,077	5,915	+3%
Sponsorship Evaluation	Visibility (hrs)	183	156	339	314	+8%
	Sponsorship Impressions (M)	2,910	824	3,734	3,190	+17%
	100% Media Equivalency (M€)	36.5	10.9	47.4	44.4	+7%
	QI Media Value (M€)	6.5	2.0	8.5	8.2	+4%
	Average Sequence Duration (sec.)	5.7	5.8	5.8	5.7	+2%
	Ratio Visibility/Broadcast Time (%)	55.5	51.1	53.4	55.5	-4%

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

Season Comparison

FIS Nordic Combined World Cup – Men



Global Overview

FIS Nordic Combined World Cup 2023/24 – Women & Mixed

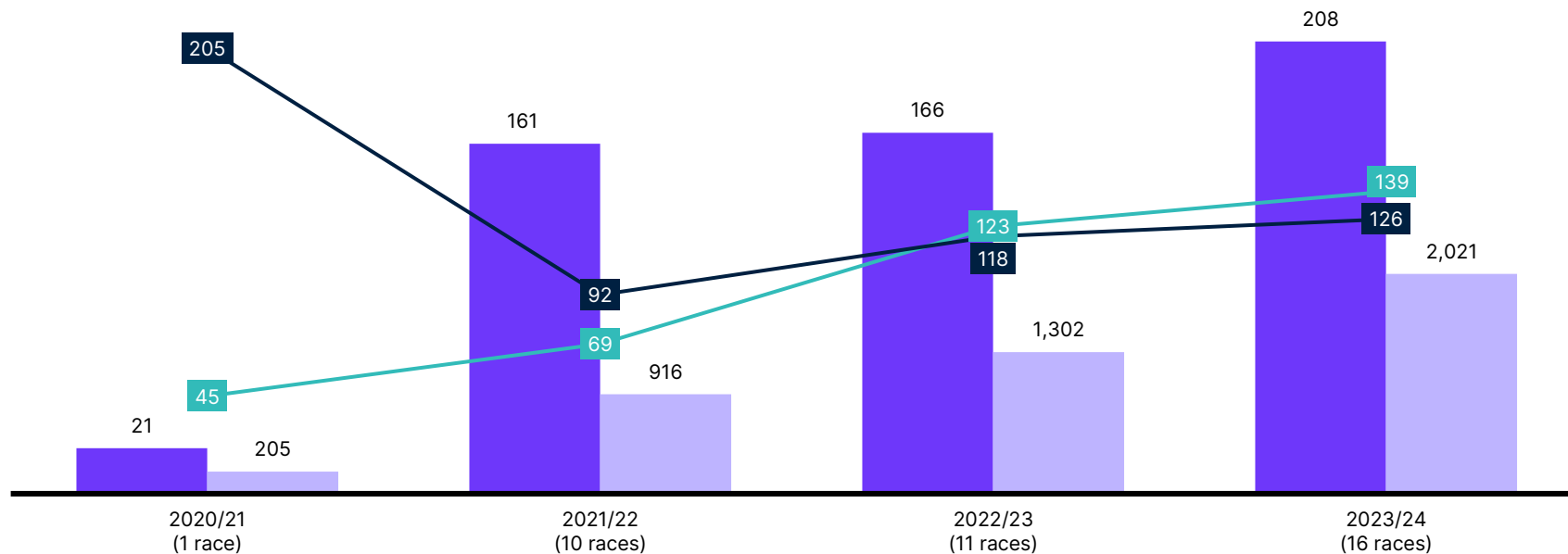
	Live	Non-Live	TOTAL	TOTAL 2022/23	TREND	
FIS Nordic Combined WC	Cumulative Audience* (M)	25	114	139	127	+9%
	Number of Broadcasts (#)	265	323	588	454	+30%
	Broadcast Time (hrs)	151	57	208	166	+25%
	Actual Playing Time (hrs)	126	46	172	134	+29%
	Event Impressions (M)	1,154	867	2,021	1,302	+55%
Sponsorship Evaluation	Visibility (hrs)	93	37	130	99	+31%
	Sponsorship Impressions (M)	875	534	1,409	930	+52%
	100% Media Equivalency (M€)	11.1	5.5	16.6	12.0	+39%
	QI Media Value (M€)	2.0	1.0	3.0	2.2	+40%
	Average Sequence Duration (sec.)	5.8	5.9	5.8	5.6	+4%
	Ratio Visibility/Broadcast Time (%)	62.1	65.2	62.9	60.0	+5%

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

Season Comparison

FIS Nordic Combined World Cup – Women & Mixed

■ Broadcast Time (h) ■ Media Impact — Audience (M) — ∅ Media Impact per race



Note: Only 1 women event took place in 2020/21 due to the Covid-19 pandemic.

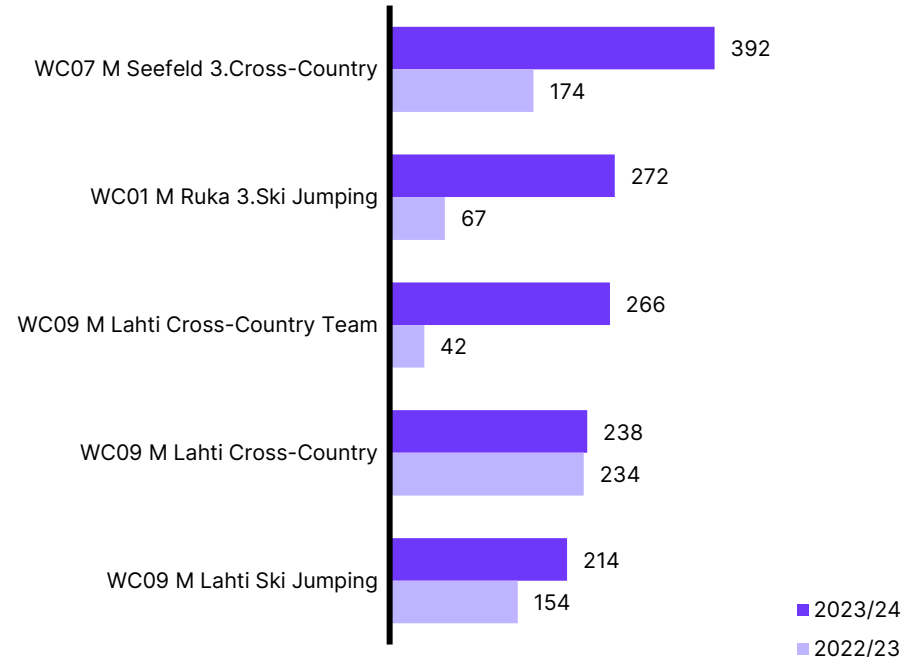
Management Summary

Key Insights

Key Takeaways

- Compared to the previous season, Broadcast Time (+15%) and Media Impact (+12%) increase while Cumulative Audience declines (-12%).
- There have been 4 events more than in 2022/23 so that average media impact per event increases by 1%.
- The drop in cumulative audience can be explained by fewer podiums of German athletes (3 vs. 19 in the previous season), leading to a reduced news coverage.
- Yet, media impact in Germany increases (+14%) as live/delayed coverage on ARD/ZDF doubles in broadcast time (but average audience declines from 2.0M to 1.5M).
- While media impact of men's competitions only increases by 3% (1 event less), women and mixed (5 events more) see a 55% increase.
- Looking at the top markets behind Germany, media impact also increases in Finland (+12%), Austria (+6%), and Norway (+15%) while Italy (-35%) is the only market with a decline
- Cross-Country races account for 60% of total media impact, Ski Jumping for the remaining 40% (last season: 63% / 36%).

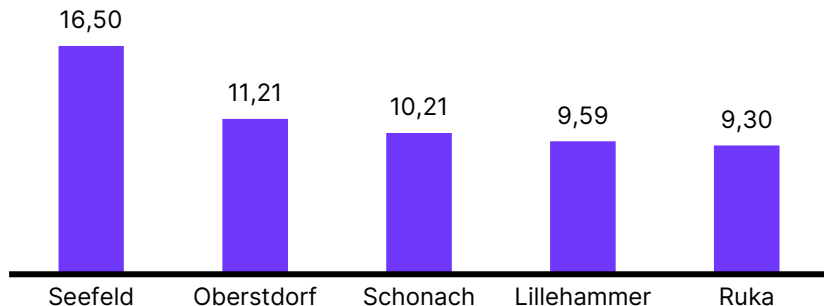
Top-5 Competitions by Media Impact (M)



Management Summary

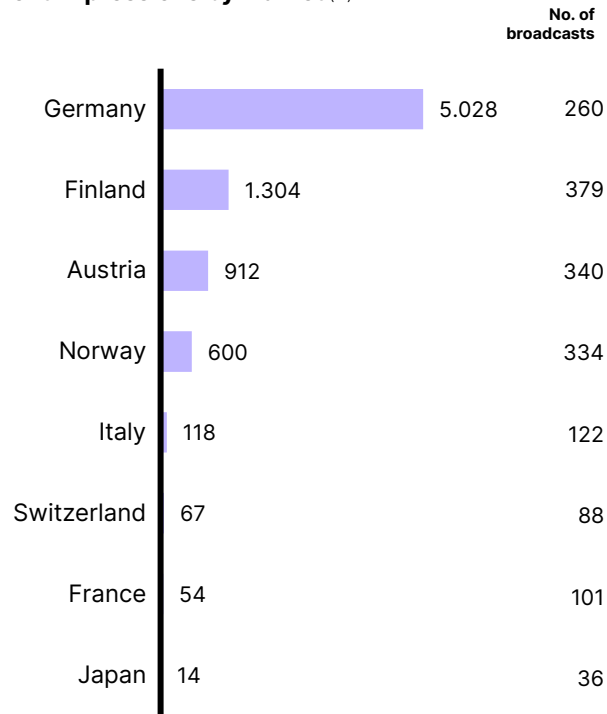
Media Monitoring

Top 5 Venues by Cumulative Live Audience* (M)



- Seefeld covers the top spot in terms of cumulative live audience, staging the traditional men's "triple" as well as 2 women's competitions. It is up from 4th rank in the previous season (10.2M live audience / +62%), having staged the same number of races.
- With a cum. live audience of 10.6M, German ARD accounts for two thirds of total numbers in Seefeld.
- Oberstdorf and Schonach swap places with very similar numbers compared to 2022/23, while last year's top-ranked venue Ramsau only comes in 9th this season.
- The country ranking by media impact keeps its order from the previous season. All markets except for Italy and Japan see a positive trend (+12% overall).

Event Impressions by Market (M)

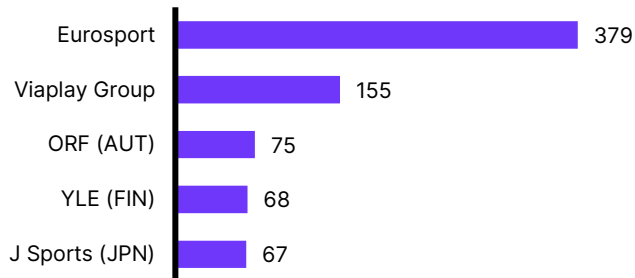


*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+ /Estimations by Nielsen Sports

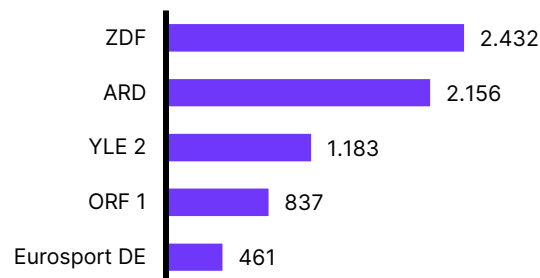
Management Summary

Media Monitoring

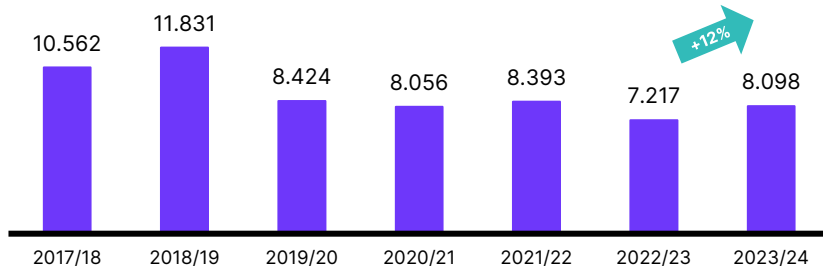
Top 5 Broadcasters by Broadcast Time (hours)



Top 5 Channels by Event Impressions (M)



World Cup Event Impressions Trend (M)



- With 379 hours of broadcast time, the various Eurosport feeds account for 45% of total coverage but only 2% of cumulative audience (8M) and 7% of event impressions (583M).
- The top 5 channels in terms of media impact keep their order from last season. German public broadcasters ARD & ZDF see a 12% increase in media impact, Finnish YLE 2 even 22%.
- While Austrian ORF 1 remains fairly stable (+3%), the German Eurosport feed almost doubles in media impact. Number of live broadcasts went up from 20 to 36 with an increase in average audience from 86k to 109k.

Media Monitoring

By country (in alphabetic order) – Men + Women

Country	Number of Broadcasts (#)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Actual Playing Time (hh:mm:ss)	Event Impressions (M)
Austria	340	36.74	132:47:54	106:16:46	912.22
Finland	379	61.58	199:48:28	163:12:33	1,304.43
France	101	1.23	44:13:06	37:36:10	54.11
Germany	260	202.06	84:39:13	69:48:49	5,028.05
Italy	122	1.47	82:00:58	73:06:43	118.03
Japan	36	0.07	66:54:59	26:29:14	14.35
Norway	334	28.58	173:47:24	139:27:16	600.02
Switzerland	88	0.75	57:21:54	49:20:48	66.90
TOTAL	1,660	332.48	841:33:55	665:18:18	8,098.11

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

Media Monitoring

By country (in alphabetic order) – Men

Country	Number of Broadcasts (#)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Actual Playing Time (hh:mm:ss)	Event Impressions (M)
Austria	227	29.42	88:17:36	70:18:25	670.28
Finland	282	50.96	149:24:18	121:19:10	1,048.59
France	78	1.05	32:39:37	28:37:33	44.21
Germany	186	151.43	60:37:22	50:49:11	3,720.08
Italy	98	1.37	68:31:07	61:02:44	111.60
Japan	36	0.07	66:54:59	26:29:14	14.35
Norway	235	21.06	127:34:25	101:11:53	415.60
Switzerland	57	0.51	40:18:09	33:42:06	52.27
TOTAL	1,199	255.86	634:17:33	493:30:15	6,076.97

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

Media Monitoring

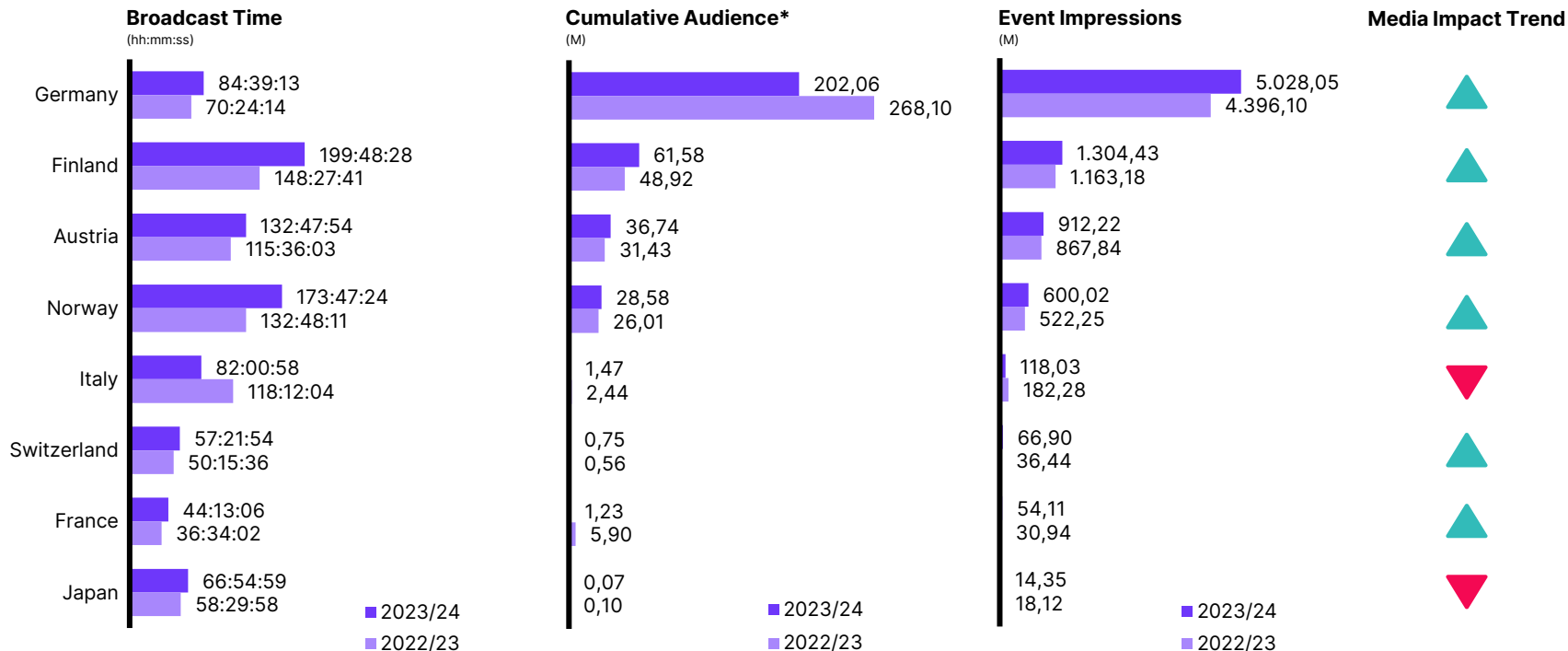
By country (in alphabetic order) – Women (incl. Mixed)

Country	Number of Broadcasts (#)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Actual Playing Time (hh:mm:ss)	Event Impressions (M)
Austria	132	12.12	44:30:18	35:58:21	241.94
Finland	122	19.00	50:24:09	41:53:23	255.85
France	33	0.37	11:33:29	8:58:38	9.89
Germany	106	90.98	24:01:51	18:59:38	1,307.97
Italy	24	0.10	13:29:51	12:03:59	6.43
Norway	140	16.01	46:12:59	38:15:23	184.42
Switzerland	31	0.24	17:03:45	15:38:42	14.63
TOTAL	588	138.82	207:16:23	171:48:03	2,021.14

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

Media Monitoring

Top 8 trending countries by Event Impressions



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

Media Monitoring

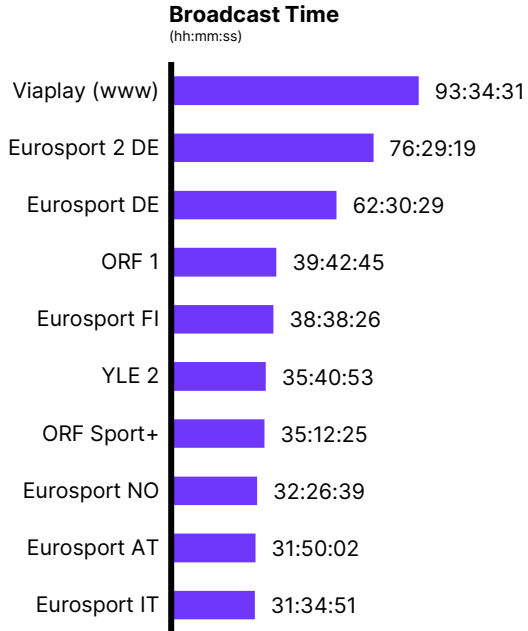
Ranking by trending country – Men and Women

Country	2022/23			2021/22		
	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Event Impressions (M)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Event Impressions (M)
Germany	202.06	84:39:13	5,028.05	268.10	70:24:14	4,396.10
Finland	61.58	199:48:28	1,304.43	48.92	148:27:41	1,163.18
Austria	36.74	132:47:54	912.22	31.43	115:36:03	867.84
Norway	28.58	173:47:24	600.02	26.01	132:48:11	522.25
Italy	1.47	82:00:58	118.03	2.44	118:12:04	182.28
Switzerland	0.75	57:21:54	66.90	0.56	50:15:36	36.44
France	1.23	44:13:06	54.11	5.90	36:34:02	30.94
Japan	0.07	66:54:59	14.35	0.10	58:29:58	18.12
TOTAL	332.48	841:33:55	8,098.11	383.48	730:47:50	7,217.16

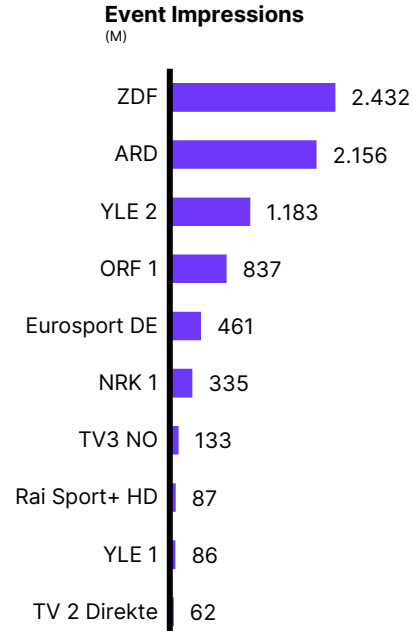
*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+ /Estimations by Nielsen Sports

Media Monitoring

Top 10 channels



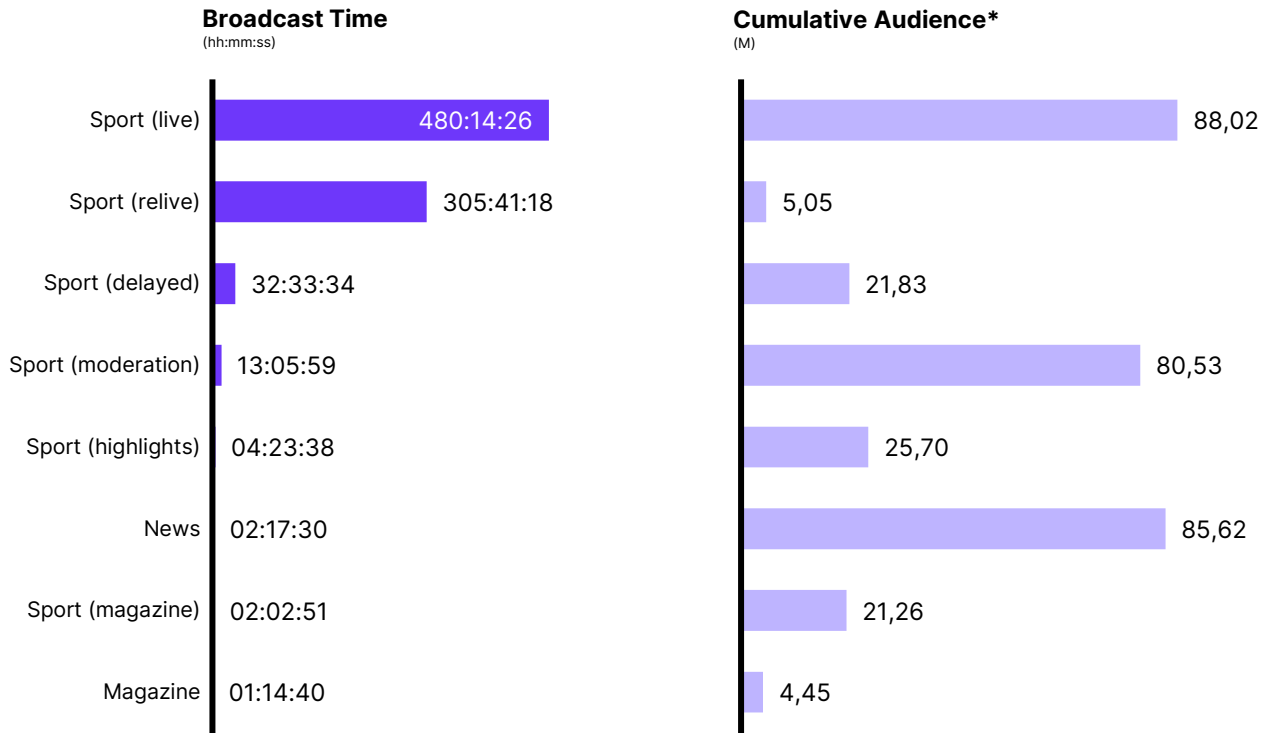
57% OF TOTAL



96% OF TOTAL

Media Monitoring

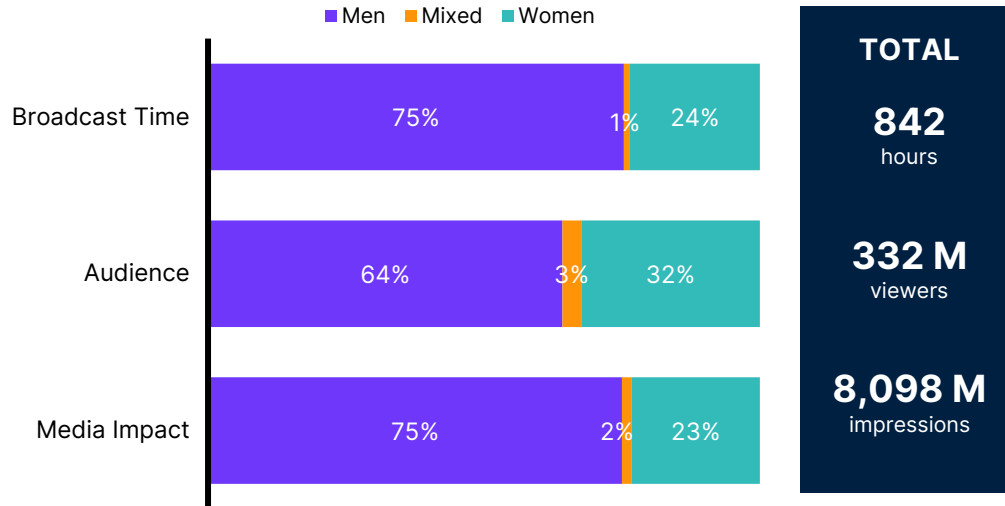
Ranking by program type



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

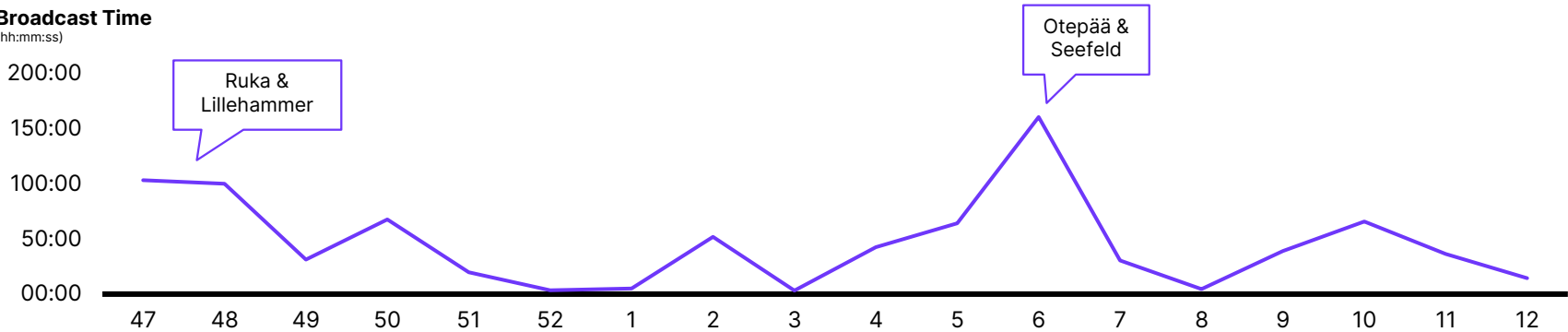
Gender comparison



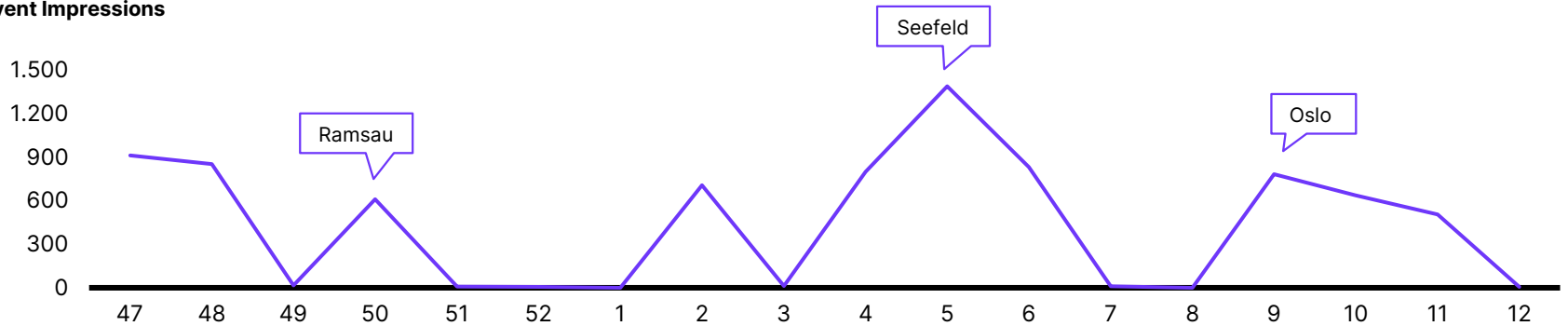
Media Monitoring

Weekly coverage trend

Broadcast Time
(hh:mm:ss)

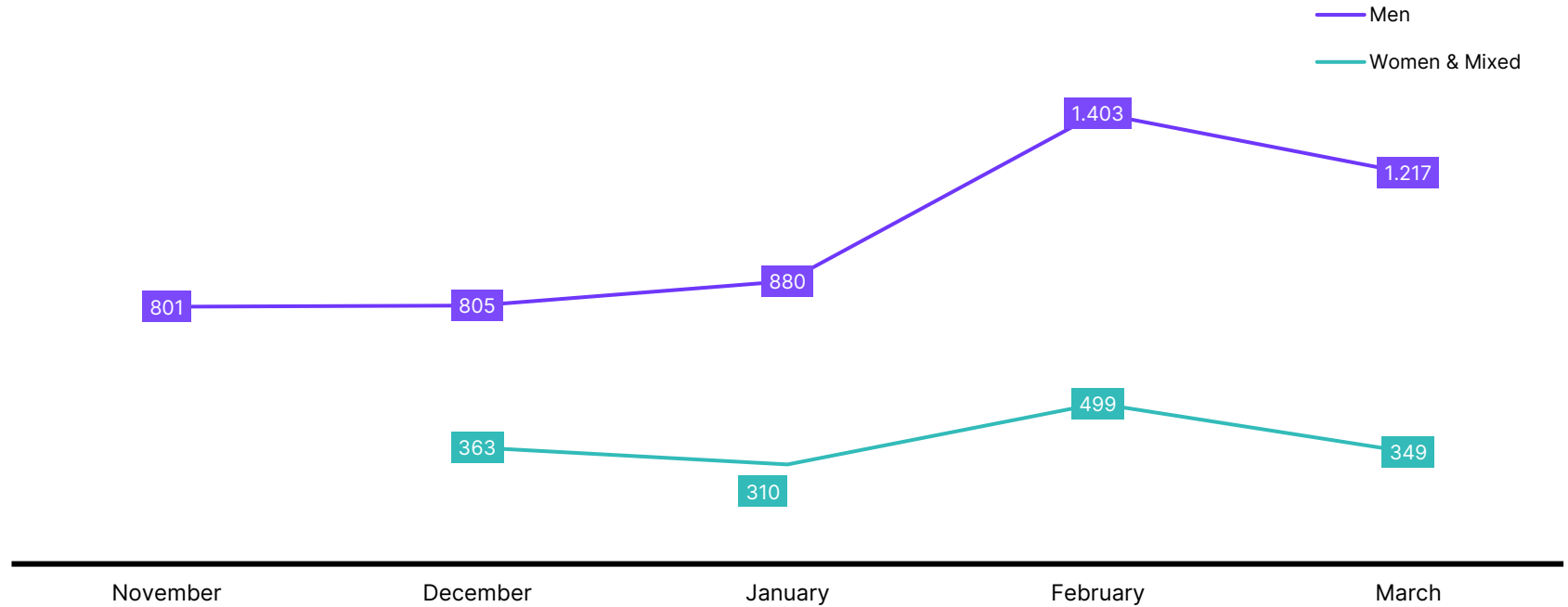


Event Impressions
(M)



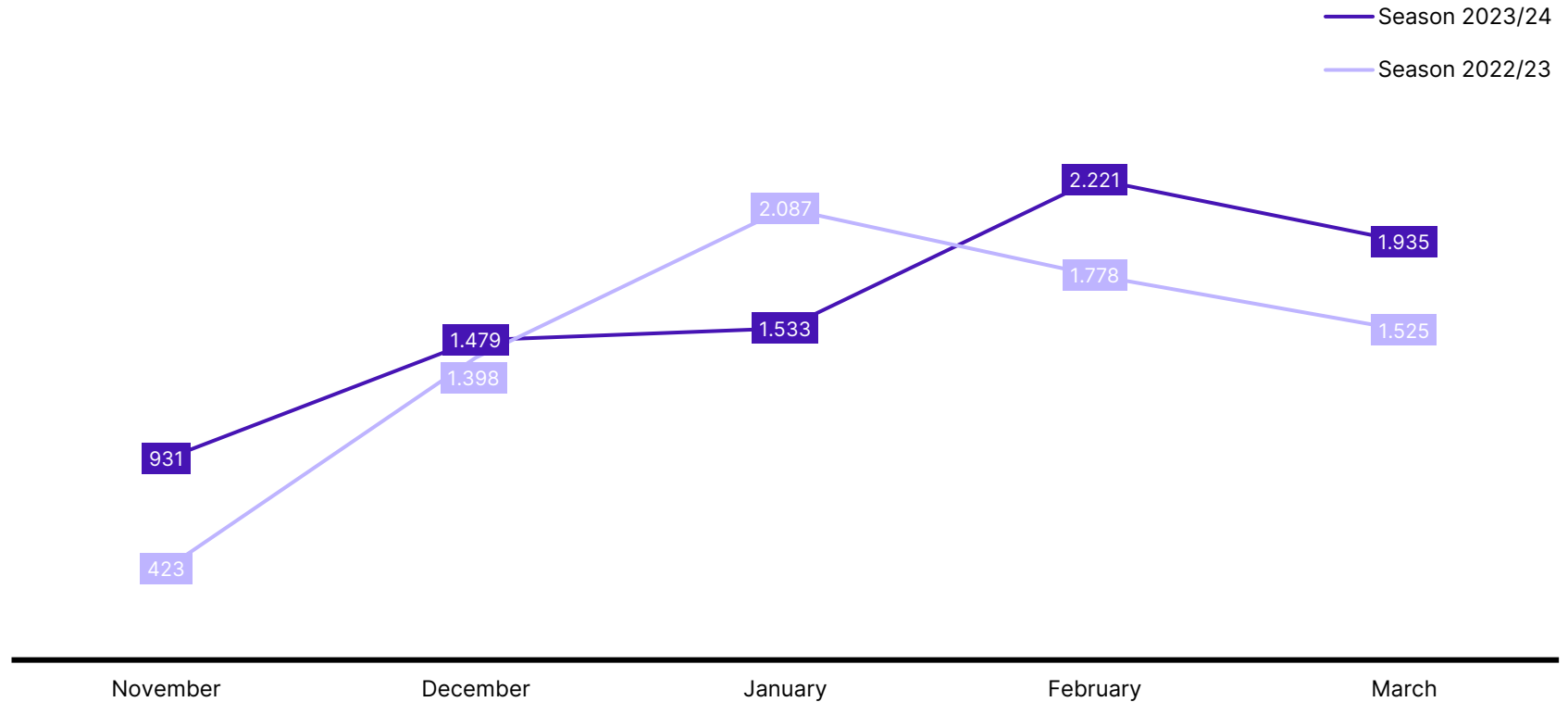
Media Monitoring

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:

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



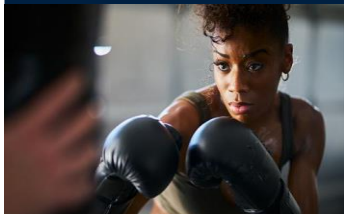
Nielsen Sports is the global leader in sports media valuation, data intelligence and research consulting.

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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