

Introduction

Study scope

Object of investigation/event:	Viessmann FIS Ski Jumping World Cup (Women)
Monitoring period:	2023-24 Season
Sponsors:	Viessmann, Hylo
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 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

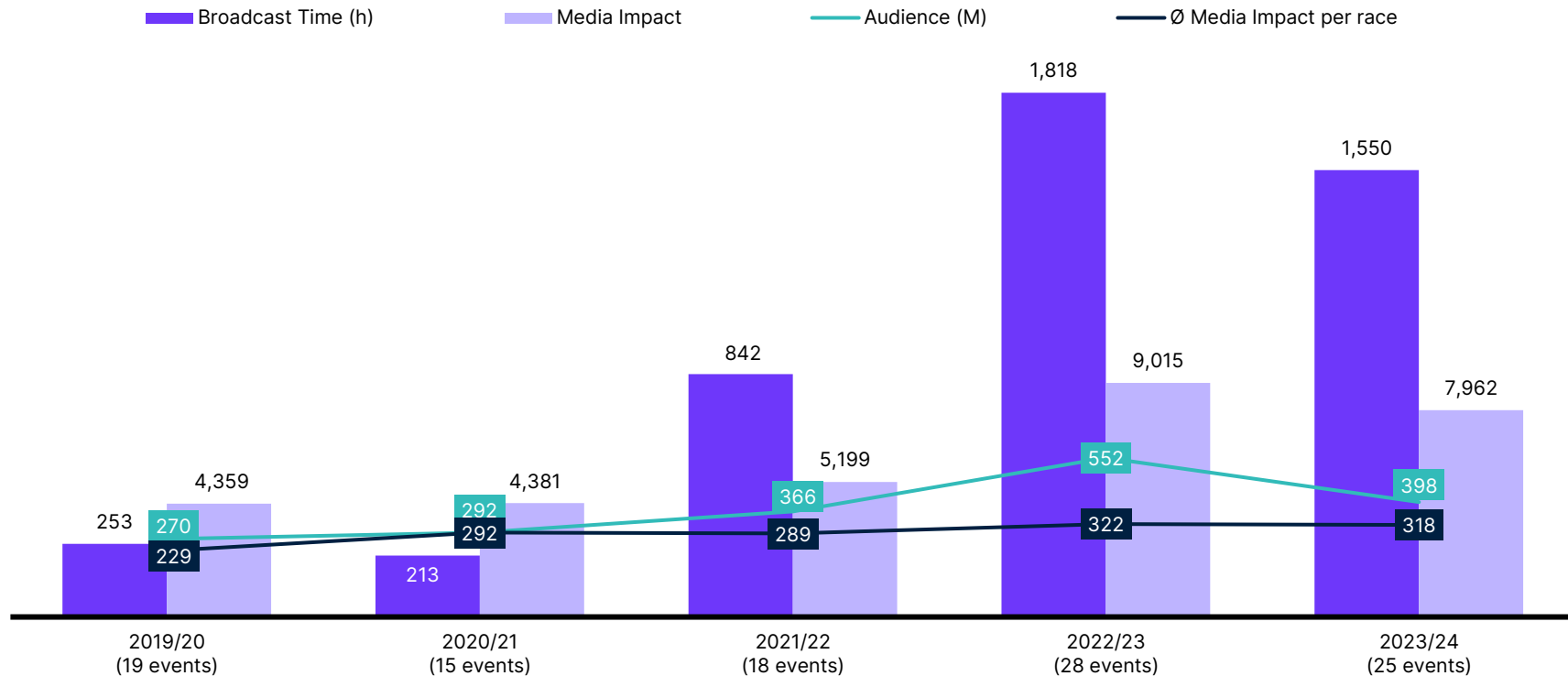
FIS Ski Jumping World Cup 2023/24 – Women

	Live	Non-Live	TOTAL	TOTAL 2022/23	TREND	
FIS Ski Jumping WC	Cumulative Audience* (M)	67	331	398	552	-28%
	Number of Broadcasts (#)	803	2,104	2,907	3,052	-5%
	Broadcast Time (hrs)	658	892	1,550	1,818	-15%
	Actual Playing Time (hrs)	550	657	1,207	1,384	-13%
	Event Impressions (M)	5,643	2,319	7,962	9,015	-12%
Sponsorship Evaluation	Visibility (hrs)	351	473	824	661	+25%
	Sponsorship Impressions (M)	3,099	625	3,724	2,976	+25%
	100% Media Equivalency (M€)	31.5	8.1	39.6	31.4	+26%
	QI Media Value (M€)	6.6	1.7	8.3	7.0	+18%
	Average Sequence Duration (sec.)	5.0	5.1	5.1	5.2	-2%
	Ratio Visibility/Broadcast Time (%)	53.4	53.0	53.2	36.3	+47%

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

Season Comparison

FIS Ski Jumping World Cup – Women



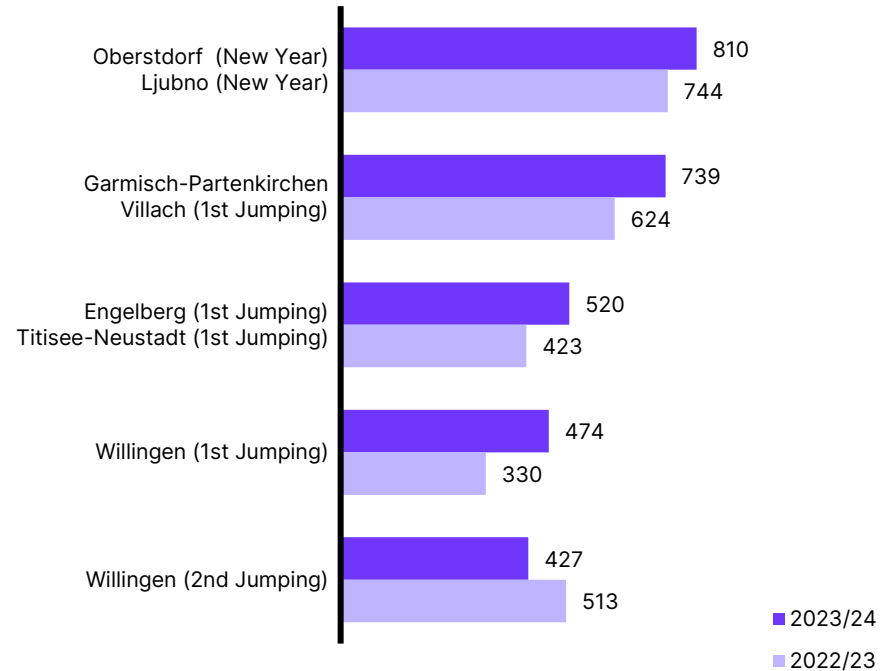
Management Summary

Key Insights

Key Takeaways

- After a record-breaking season 2022/23, all media KPI decline YOY but are still above the multi-year average.
- Overall media impact declines by 12%. Considering there were 3 events less than in the previous season, average media impact per event remains stable (-1%).
- While top markets Germany (+5%), Slovenia (+14%), and Finland (+47%) all see a positive media impact trend, numbers go down mainly in Japan (-47%) and Austria (-16%).
- In Japan, average live audience on NHK BS1 even increases from 112k to 117k but there was generally less coverage both in terms of live/relive and news/magazines.
- Similarly in Austria, average live audience on ORF1 increases from 202k to 226k but the decline in media impact comes from a reduced coverage (8h less live).
- Overall, cumulative audience declines by 28% mainly due to fewer news features on wide-reaching channels in Germany and Japan.
- The Two Nights Tournament proves to be successful in terms of media impact – the two events account for 20% of total numbers and their media impact is more than double the World Cup average.

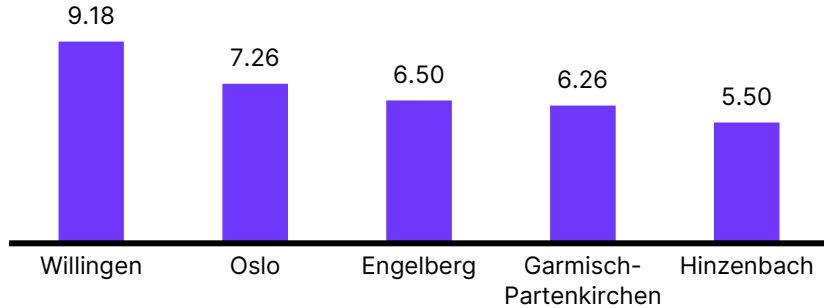
Top-5 Competitions by Media Impact (M)



Management Summary

Media Monitoring

Top 5 Venues by Cumulative Live Audience* (M)



- Willingen ranks top again in the venue ranking by live audience, only losing 6% compared to last year when there was an additional mixed event on top of the two individual women's competitions.
- With 6.5M, host broadcaster ARD accounts for 71% of Willingen's live audience. It is followed by Slovenian RTV SLO 2 (1.2M) and Austrian ORF 1 (0.8M).
- The other 4 venues are new to the top-5 compared to 2022/23. Last year's second ranked Ljubno only comes in 10th this season due to the lack of live coverage on ARD or ZDF in Germany (only highlights).
- The top 3 venues in the ranking all staged men's competitions on the same weekend.

Event Impressions by Market (M)

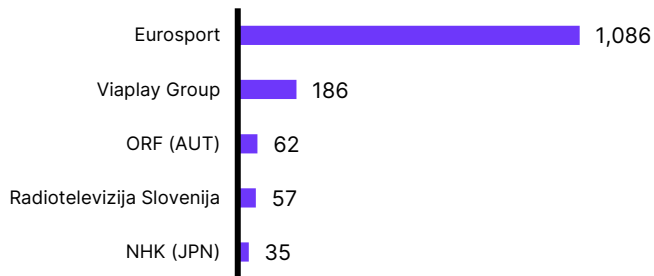
Market	No. of broadcasts
Germany	4,159
Slovenia	1,173
Austria	746
Japan	568
Finland	360
Poland	313
Norway	240
Czech Republic	121
Romania	87
France	65
Switzerland	52
Sweden	21
Italy	20
Slovakia	17
Netherlands	10
Denmark	9
Croatia	1

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

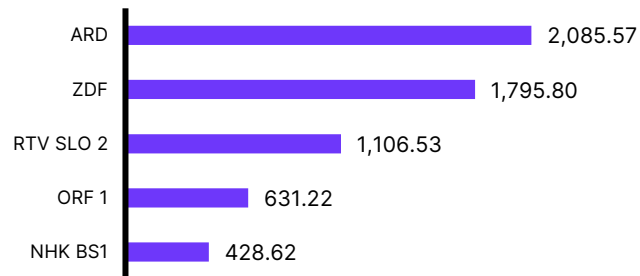
Management Summary

Media Monitoring

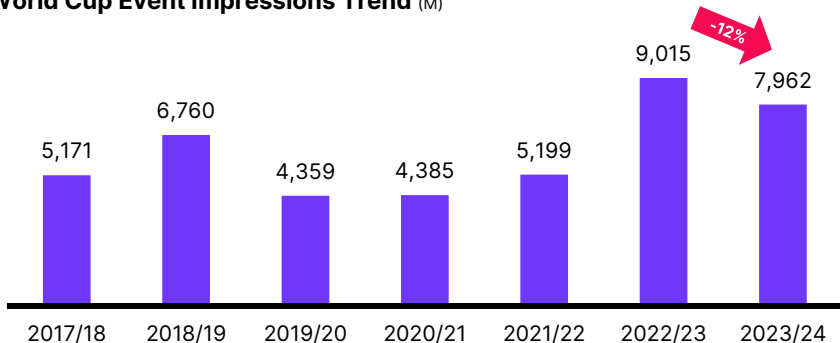
Top 5 Broadcasters by Broadcast Time (hours)



Top 5 Channels by Event Impressions (M)



World Cup Event Impressions Trend (M)



- With 1,086 hours of broadcast time, the various Eurosport feeds account for 70% of total coverage but only 2% of cumulative audience (9M) and 10% of event impressions (777M).
- German ARD and ZDF rank top again in terms of media impact with a 13% increase YOY.
- Slovenian RTV SLO 2 (+12%) keeps its third rank while Austrian ORF 1 (-16%) and Japanese NHK BS1 (-45%) swap places, based on previous year's results.
- Among the top channels, YLE 2 from Finland (+50%) is the one with the most positive development, ranking 6th in terms of media impact (up from 8th rank last season).

Media Monitoring

By country (in alphabetic order)

Country	Number of Broadcasts (#)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Actual Playing Time (hh:mm:ss)	Event Impressions (M)
Austria	299	40.00	138:28:40	105:12:39	745.93
Croatia	87	0.01	80:24:26	61:42:21	1.41
Czech Republic	180	15.06	112:02:14	89:06:37	121.46
Denmark	67	0.08	59:24:20	47:48:07	8.51
Finland	182	26.08	105:04:47	89:48:07	359.64
France	225	11.15	67:32:23	56:21:38	65.15
Germany	262	179.15	92:56:04	69:05:24	4,159.05
Italy	90	0.18	88:44:49	65:24:45	19.92
Japan	92	49.49	35:43:37	27:11:33	568.34

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

Media Monitoring

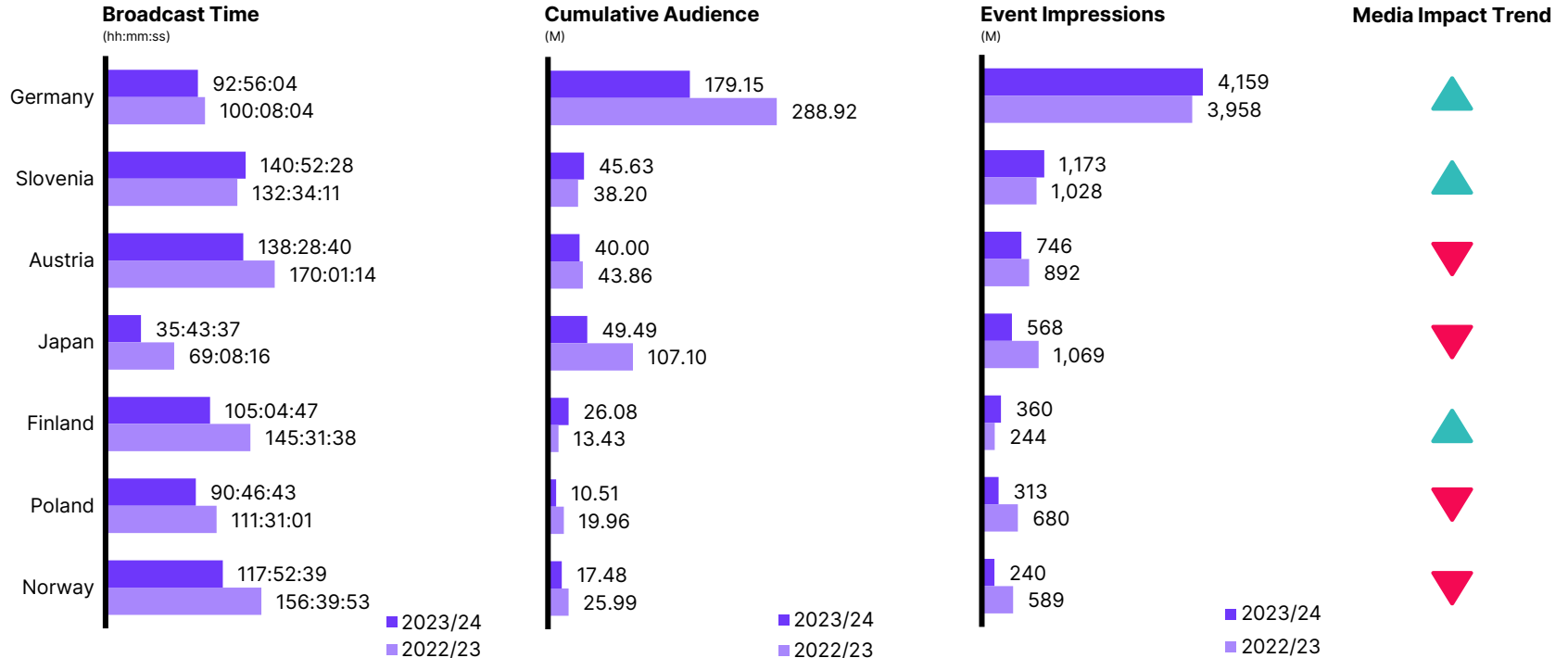
By country (in alphabetic order)

Country	Number of Broadcasts (#)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Actual Playing Time (hh:mm:ss)	Event Impressions (M)
Netherlands	93	0.10	82:26:34	65:05:43	10.13
Norway	232	17.48	117:52:39	96:29:18	239.82
Poland	116	10.51	90:46:43	69:40:32	312.66
Romania	96	0.81	87:16:55	66:37:45	86.73
Slovakia	103	0.15	96:43:56	72:27:53	17.40
Slovenia	580	45.63	140:52:28	102:44:56	1,173.04
Sweden	90	0.65	74:06:38	60:56:17	21.37
Switzerland	113	1.91	78:48:03	61:04:41	51.70
TOTAL	2,907	398.45	1549:15:16	1206:48:18	7,962.27

*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

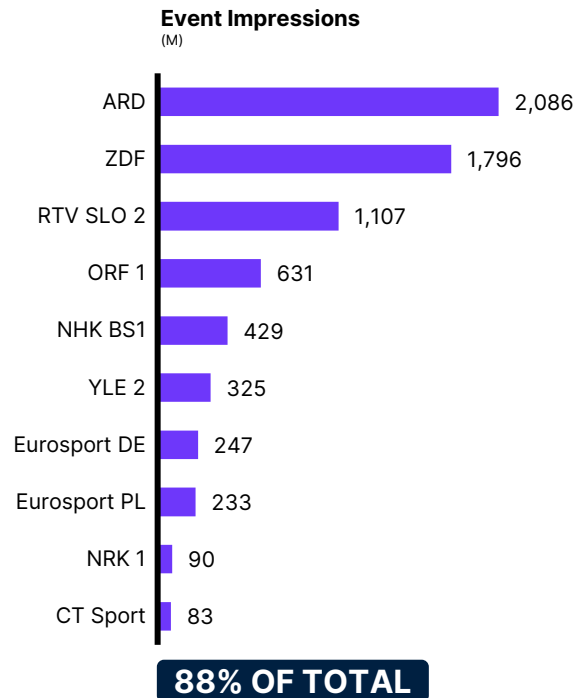
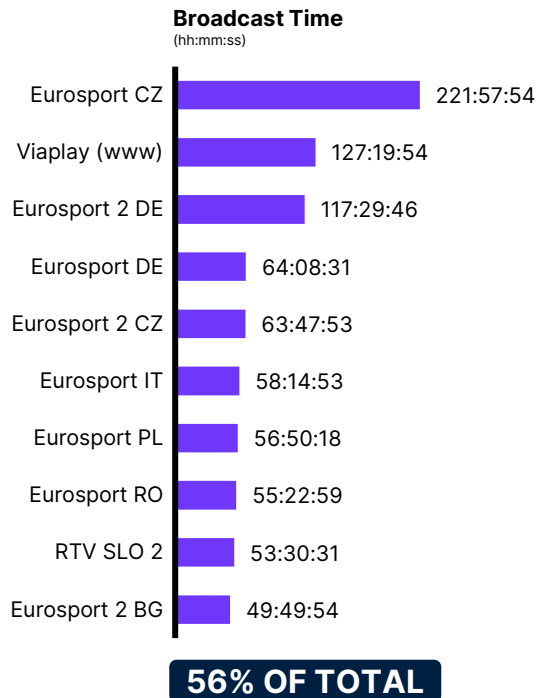
Ranking by trending country

Country	2023/24			2022/23		
	Cumulative Audience*	Broadcast Time	Event Impressions	Cumulative Audience*	Broadcast Time	Event Impressions
	(M)	(hh:mm:ss)	(M)	(M)	(hh:mm:ss)	(M)
Germany	179.15	92:56:04	4,159.05	288.92	122:35:39	4,759.83
Slovenia	45.63	140:52:28	1,173.04	38.20	157:23:36	1,132.04
Austria	40.00	138:28:40	745.93	43.86	191:17:17	977.58
Japan	49.49	35:43:37	568.34	107.10	76:38:56	1,173.38
Finland	26.08	105:04:47	359.64	13.43	155:35:30	283.43
Poland	10.51	90:46:43	312.66	19.96	135:18:56	953.02
Norway	17.48	117:52:39	239.82	25.99	167:29:48	618.79
Czech Republic	15.06	112:02:14	121.46	3.50	117:41:21	68.22
Romania	0.81	87:16:55	86.73	1.35	107:14:32	91.38
France	11.15	67:32:23	65.15	0.54	74:18:16	49.34
Switzerland	1.91	78:48:03	51.70	0.67	92:51:36	80.80
Sweden	0.65	74:06:38	21.37	2.94	135:54:38	41.49
Italy	0.18	88:44:49	19.92	0.27	108:13:28	34.53
Slovakia	0.15	96:43:56	17.40	2.21	135:20:23	206.32
Netherlands	0.10	82:26:34	10.13	0.34	106:08:17	37.68
Denmark	0.08	59:24:20	8.51	0.13	106:22:05	17.23
Croatia	0.01	80:24:26	1.41	0.01	102:17:51	1.09
China	-	-	-	2.90	0:01:07	3.23
TOTAL	398.45	1549:15:16	7,962.27	552.31	2092:43:14	10,529.40

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

Top 10 channels

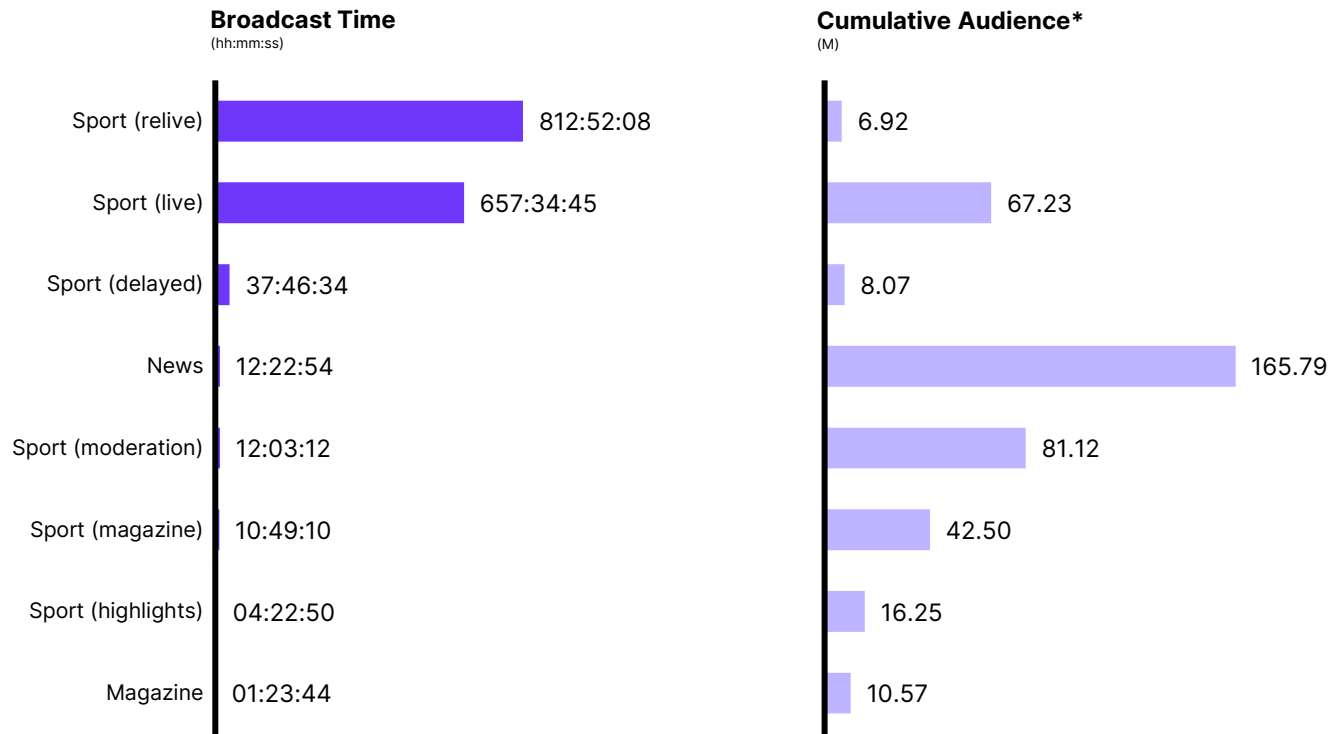


Eurosport CZ covers – besides the Czech Republic – Croatia, Slovenia, and Slovakia

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

Media Monitoring

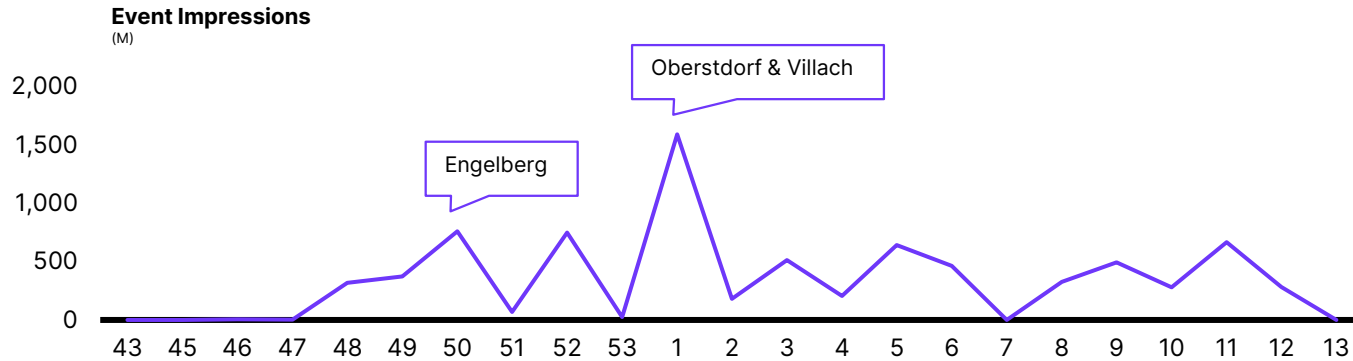
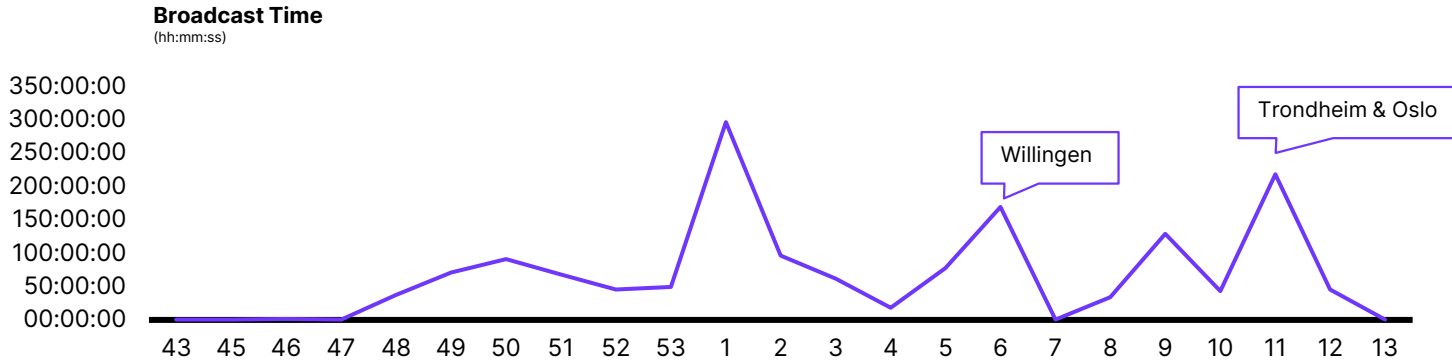
Ranking by program type



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

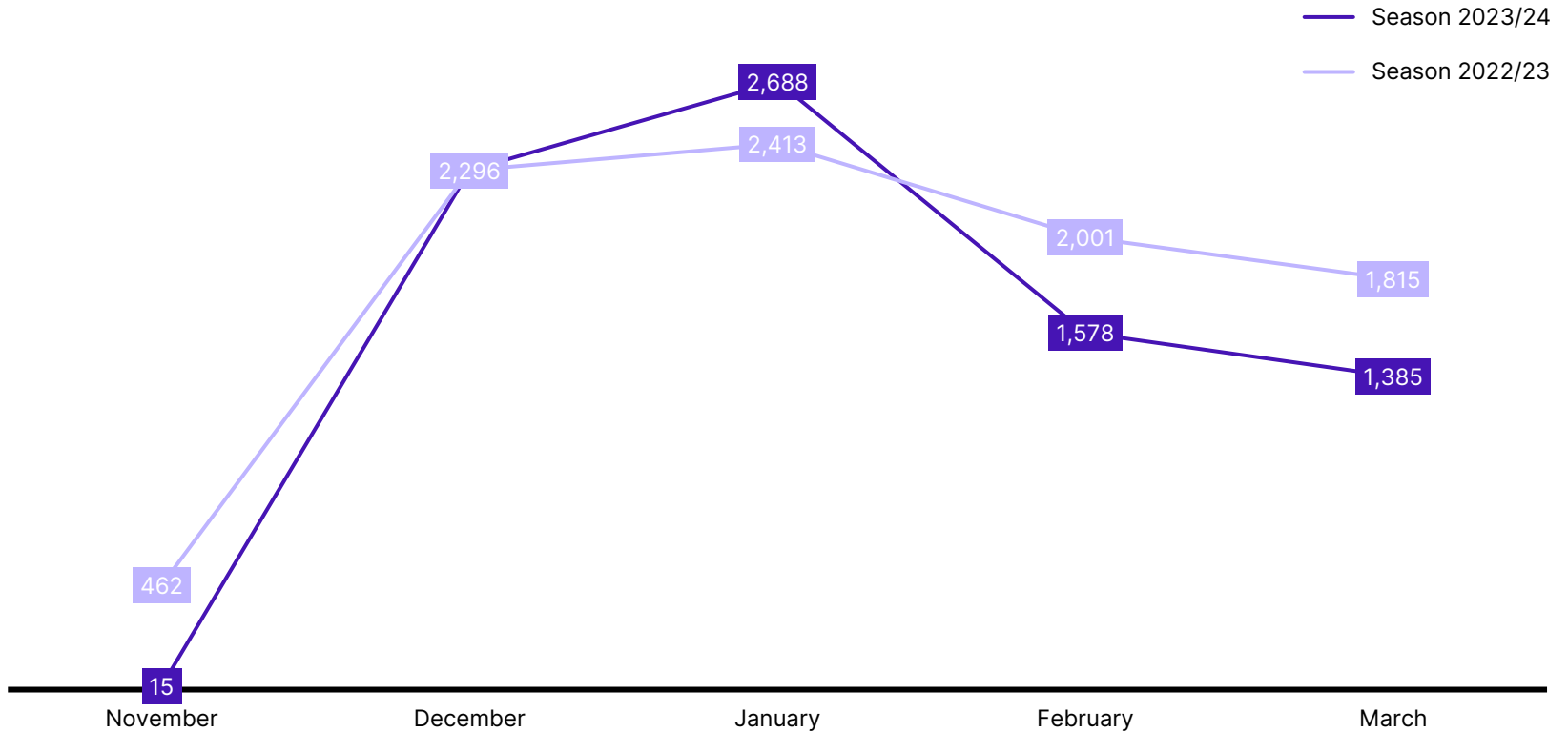
Media Monitoring

Weekly coverage trend



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:

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



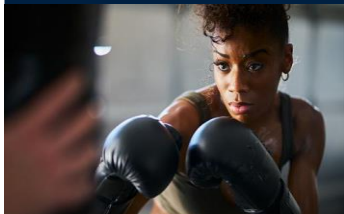
Nielsen Sports is the global leader in sports media valuation, data intelligence and research consulting.

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.

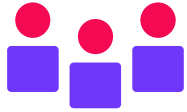
Innovative



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**

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**Billions of
data points**

created through algorithmic valuation and frame by frame video analysis

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