



Viessmann FIS Ski Jumping World Cup Men 2023/24

TV Media Evaluation – Event Summary



Expertise by Nielsen Sports
Your contacts: Alexander Karduck



Introduction

Study scope

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

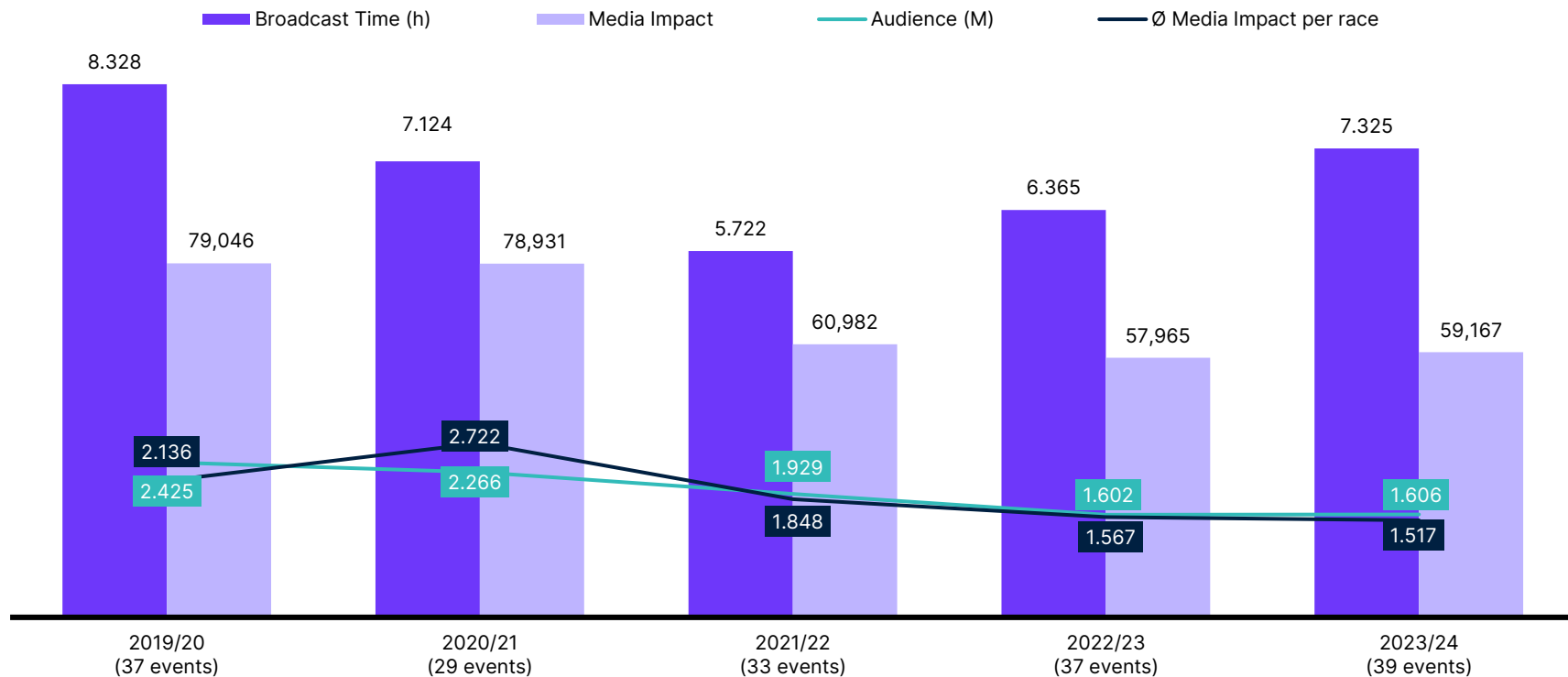
FIS Ski Jumping World Cup 2023/24

		Live	Non-Live	TOTAL	TOTAL 2022/23	TREND
FIS Ski Jumping WC	Cumulative Audience* (M)	378	1,228	1,606	1,602	+0%
	Number of Broadcasts (#)	2,033	8,308	10,341	8,887	+16%
	Broadcast Time (hrs)	2,173	5,152	7,325	6,365	+15%
	Actual Playing Time (hrs)	1,734	3,993	5,727	5,094	+12%
	Event Impressions (M)	48,802	10,365	59,167	57,965	+2%
Sponsorship Evaluation	Visibility (hrs)	1,028	2,518	3,546	2,519	+41%
	Sponsorship Impressions (M)	23,723	2,619	26,342	19,771	+33%
	100% Media Equivalency (M€)	165.8	34.2	200.0	140.9	+42%
	QI Media Value (M€)	34.4	7.8	42.1	31.1	+36%
	Average Sequence Duration (sec.)	4.9	4.8	4.9	4.3	+14%
	Ratio Visibility/Broadcast Time (%)	47.3	48.9	48.4	39.6	+22%

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

Season Comparison

FIS Ski Jumping World Cup – Men



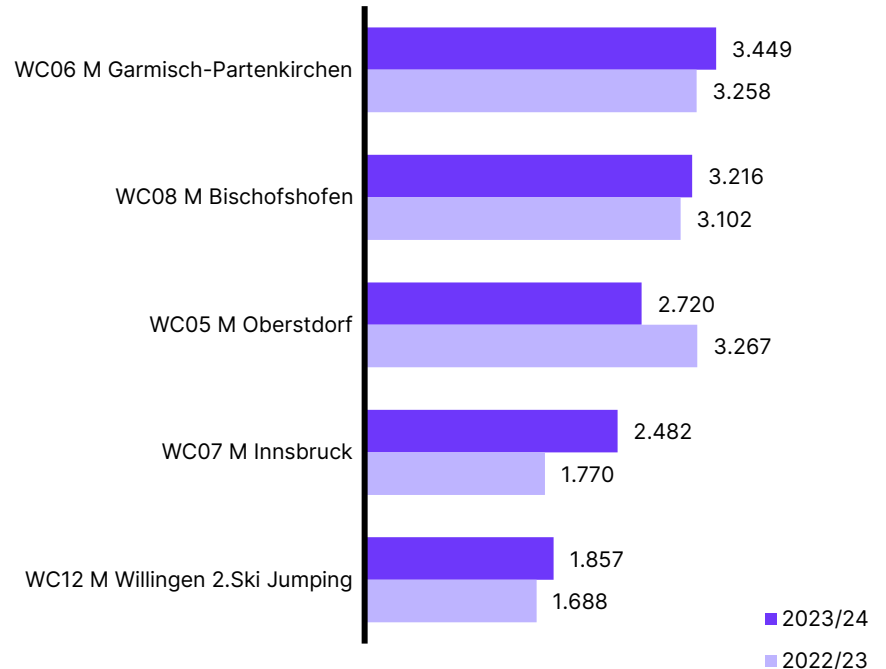
Management Summary

Key Insights

Key Takeaways

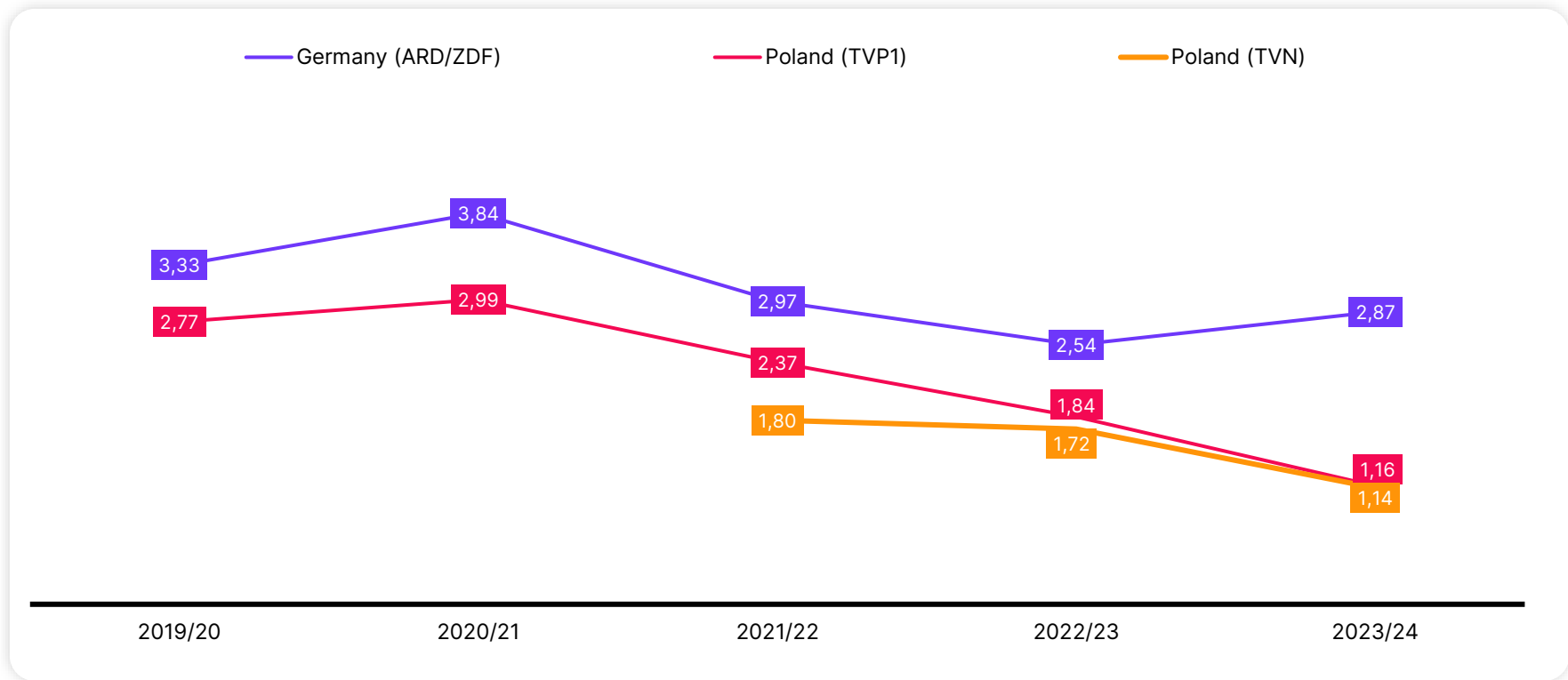
- Overall media performance is slightly stronger compared to the previous season: Broadcast Time +15% and Media Impact 2%, while Cumulative Audience remains unchanged.
- Germany (+28%) takes over the media impact lead from Poland (-21%) again, after Poland had claimed the top spot in 3 of the past 5 seasons.
- Taking both markets together, media impact remains stable (+1%). And so does the overall share they contribute to the total media impact (79% both this and last season).
- Average live audience in Germany (ARD/ZDF) increases from 2.54M to 2.87M YOY but slightly trails behind the 2021/22 numbers (2.97M).
- With only 2 podium finishes (both by Aleksander Zniszczoł), average live audience in Poland declines from 1.69M to 1.13M on TVN and from 1.92M to 1.30M on TVP1. On Eurosport, it remained stable (~0.6M).
- Among the top nations, Austria (+29%) and Finland (+13%) see the strongest increase in media impact while the trend in Norway (-36%) goes in the opposite direction.

Top-5 Competitions by Media Impact (M)



Management Summary

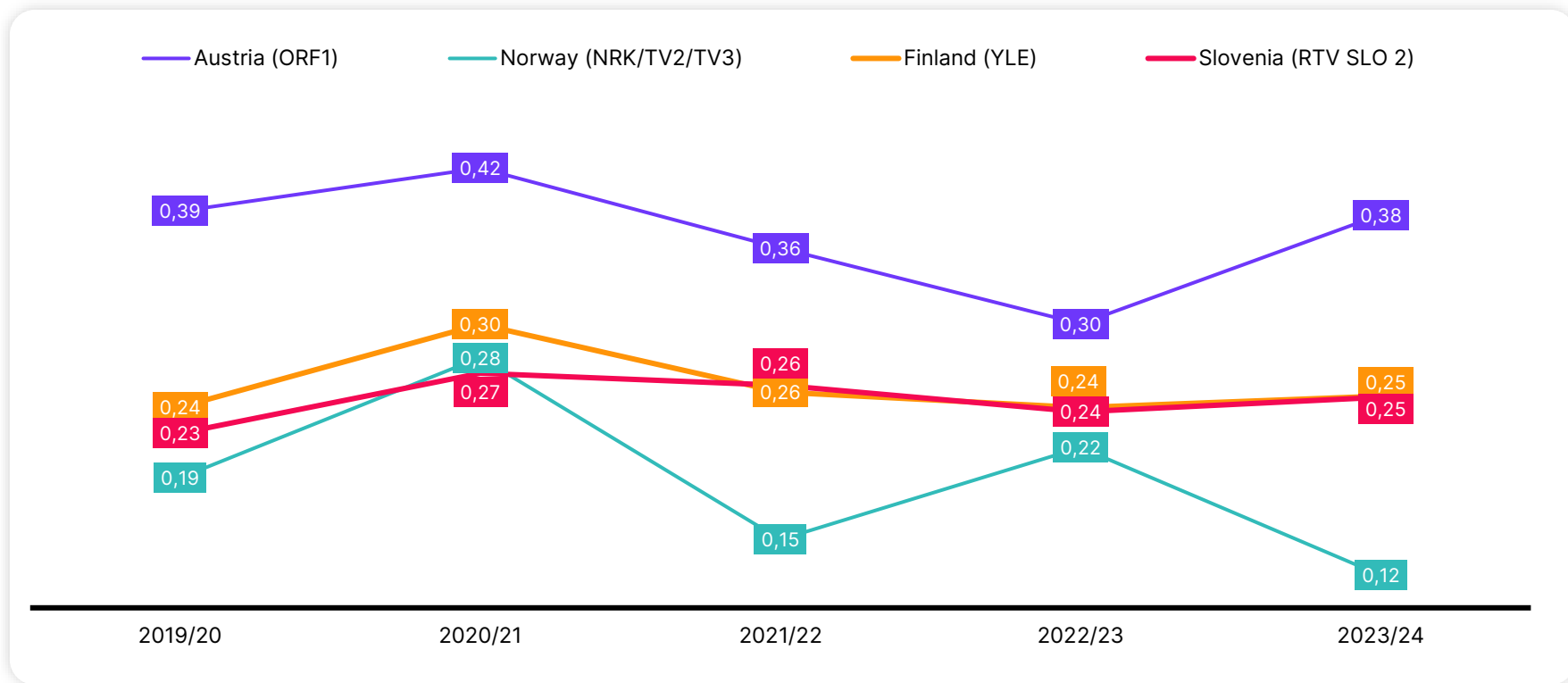
Short Aside: Development of average audience* per live airing (M) in core markets (1/2)



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

Management Summary

Short Aside: Development of average audience* per live airing (M) in core markets (2/2)



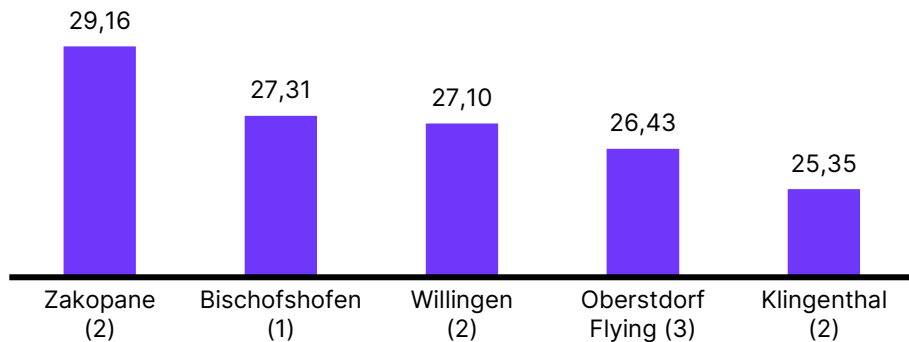
*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+/Estimations by Nielsen Sports

Management Summary

Media Monitoring

Top 5 Venues by Cumulative Live Audience (M)

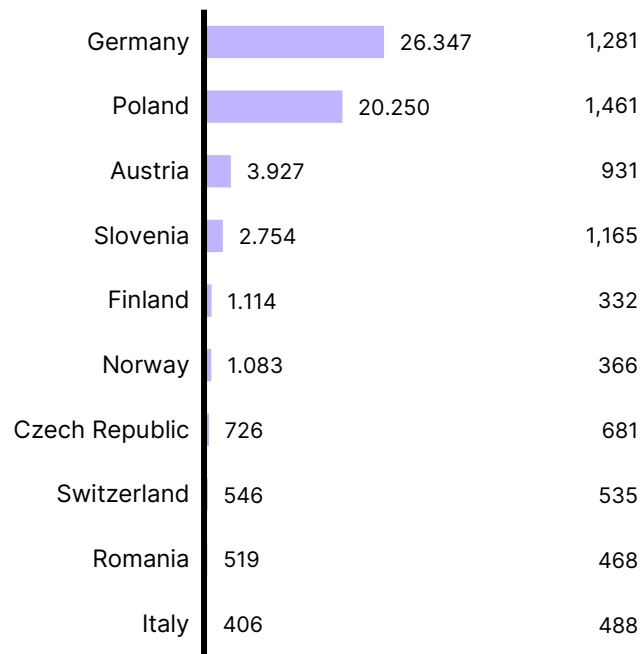
(#) = No. of events



- Zakopane again ranks top in terms of cumulative live audience despite a decline of 4.5M (-13%) compared to the previous season. Numbers in host market Poland are down from 11.8M in 2022/23 to 8.6M this season.
- Bischofshofen (+39%) replaces Garmisch-Partenkirchen (-23%) as the only 4 Hills venue in the ranking.
- 3 of the top-5 venues are located in Germany. Overall, cum. live audience figures on ARD/ZDF for domestic events are more than 50% above those for World Cups abroad.
- Romania is a new joiner in the top-10 ranking by media impact (up from 12th rank last season) thanks to broader coverage on Eurosport and slightly higher live audience (up from 20k to 24k).

Top-10 Event Impressions by Market (M)

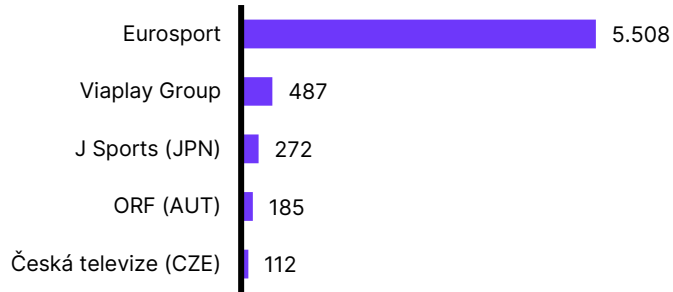
No. of broadcasts



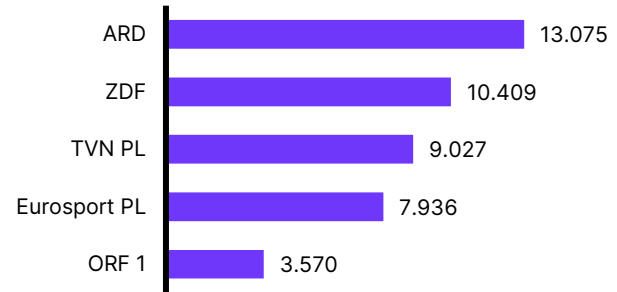
Management Summary

Media Monitoring

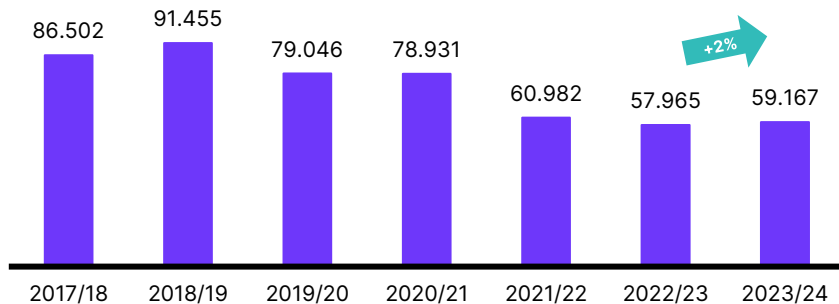
Top 5 Broadcasters by Broadcast Time (hours)



Top 5 Channels by Event Impressions (M)



World Cup Event Impressions Trend (M)



- With 5,508 hours of broadcast time, the various Eurosport feeds account for 75% of total coverage but only 6% of cumulative audience (101M) and 21% of event impressions (12.4bn).
- The channel ranking by media impact reflects well the overall trend in Germany and Poland: ARD (last year 2nd rank) and ZDF (4th) together generate a 28% greater media impact and take the top spots of the ranking.
- TVN PL (1st), Eurosport PL (3rd) and TVP 1 (down from 5th to 8th) together lose 19% of their media impact.
- Austrian ORF 1 climbs up one spot with a 38% increase in media impact YOY.

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	931	129.26	593:20:26	469:29:02	3,927.40
China	39	13.45	32:24:46	30:42:16	309.67
Croatia	441	3.01	448:26:07	357:28:15	123.20
Czech Republic	681	34.44	562:41:18	461:46:19	726.38
Denmark	125	0.21	166:00:02	109:16:36	30.93
Finland	332	47.22	282:36:33	212:14:53	1,113.65
France	613	5.60	294:25:41	249:50:19	281.40
Germany	1,281	741.37	486:18:09	375:55:33	26,347.19
Italy	488	3.25	513:06:10	419:21:04	405.92
Japan	215	50.82	275:51:56	134:07:19	305.07

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

Media Monitoring

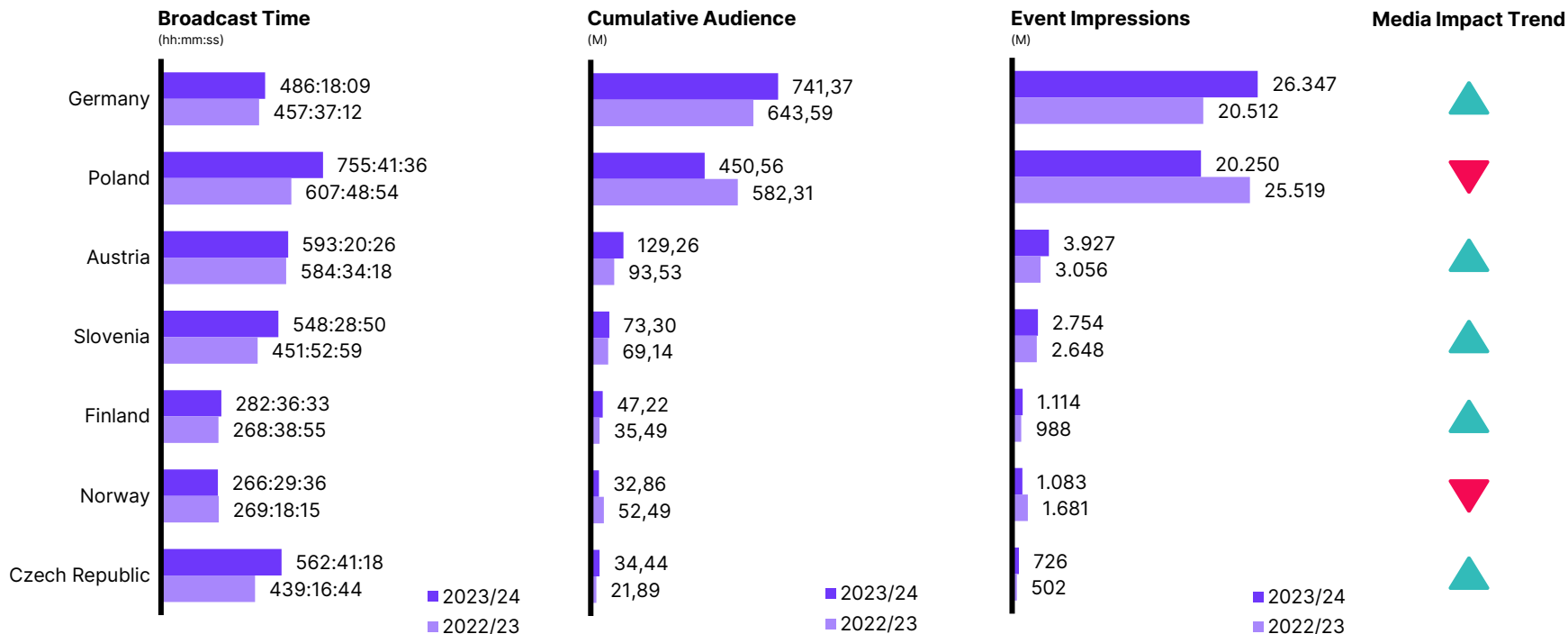
By country (in alphabetic order) – (2/2)

Country	Number of Broadcasts (#)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Actual Playing Time (hh:mm:ss)	Event Impressions (M)
Netherlands	456	4.12	451:30:13	364:59:22	204.99
Norway	366	32.86	266:29:36	190:43:35	1,082.98
Poland	1,461	450.56	755:41:36	619:38:57	20,249.69
Romania	468	4.28	449:01:19	366:17:09	518.57
Slovakia	578	1.85	562:10:23	440:26:00	126.36
Slovenia	1,165	73.30	548:28:50	426:44:38	2,754.03
Sweden	165	2.57	191:17:58	137:02:43	110.40
Switzerland	535	8.15	443:41:09	359:25:16	545.89
USA	1	0.03	0:59:00	0:55:00	3.30
TOTAL	10,341	1,606.35	7324:31:14	5726:24:18	59,167.02

*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

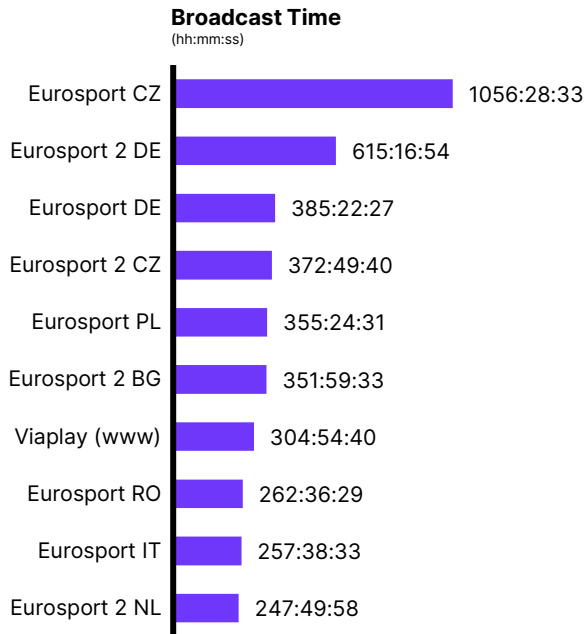
Ranking by trending country (by event impressions 2023/24)

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	741.37	486:18:09	26,347.19	643.59	457:37:12	20,512.15
Poland	450.56	755:41:36	20,249.69	582.31	607:48:54	25,518.53
Austria	129.26	593:20:26	3,927.40	93.53	584:34:18	3,055.90
Slovenia	73.30	548:28:50	2,754.03	69.14	451:52:59	2,648.26
Finland	47.22	282:36:33	1,113.65	35.49	268:38:55	987.56
Norway	32.86	266:29:36	1,082.98	52.49	269:18:15	1,680.64
Czech Republic	34.44	562:41:18	726.38	21.89	439:16:44	502.42
Switzerland	8.15	443:41:09	545.89	6.53	403:01:39	416.86
Romania	4.28	449:01:19	518.57	3.18	365:13:47	332.76
Italy	3.25	513:06:10	405.92	3.88	490:16:32	423.05
China	13.45	32:24:46	309.67	5.40	0:01:52	7.28
Japan	50.82	275:51:56	305.07	67.56	248:37:49	373.87
France	5.60	294:25:41	281.40	2.92	240:00:21	151.77
Netherlands	4.12	451:30:13	204.99	2.73	413:03:26	223.73
Slovakia	1.85	562:10:23	126.36	7.92	457:07:47	671.46
Croatia	3.01	448:26:07	123.20	2.96	357:48:32	326.64
Sweden	2.57	191:17:58	110.40	0.62	164:57:39	93.49
Denmark	0.21	166:00:02	30.93	0.23	144:20:43	31.30
USA	0.03	0:59:00	3.30	0.07	0:59:00	7.67
TOTAL	1,606.35	7324:31:14	59,167.02	1,602.42	6364:36:25	57,965.32

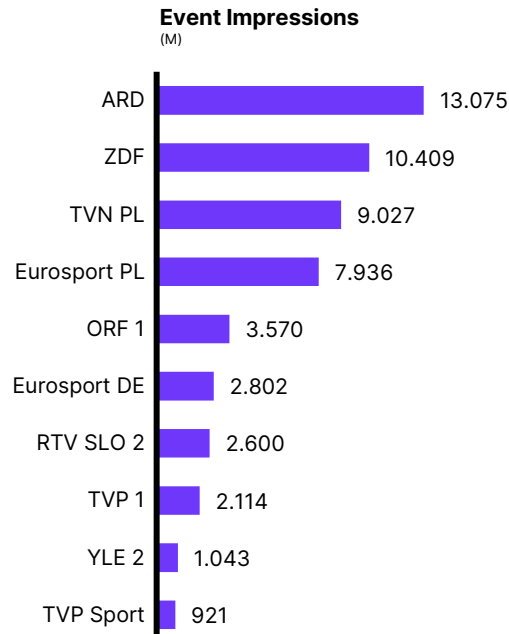
*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+ /Estimations by Nielsen Sports
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Media Monitoring

Top 10 channels



57% OF TOTAL

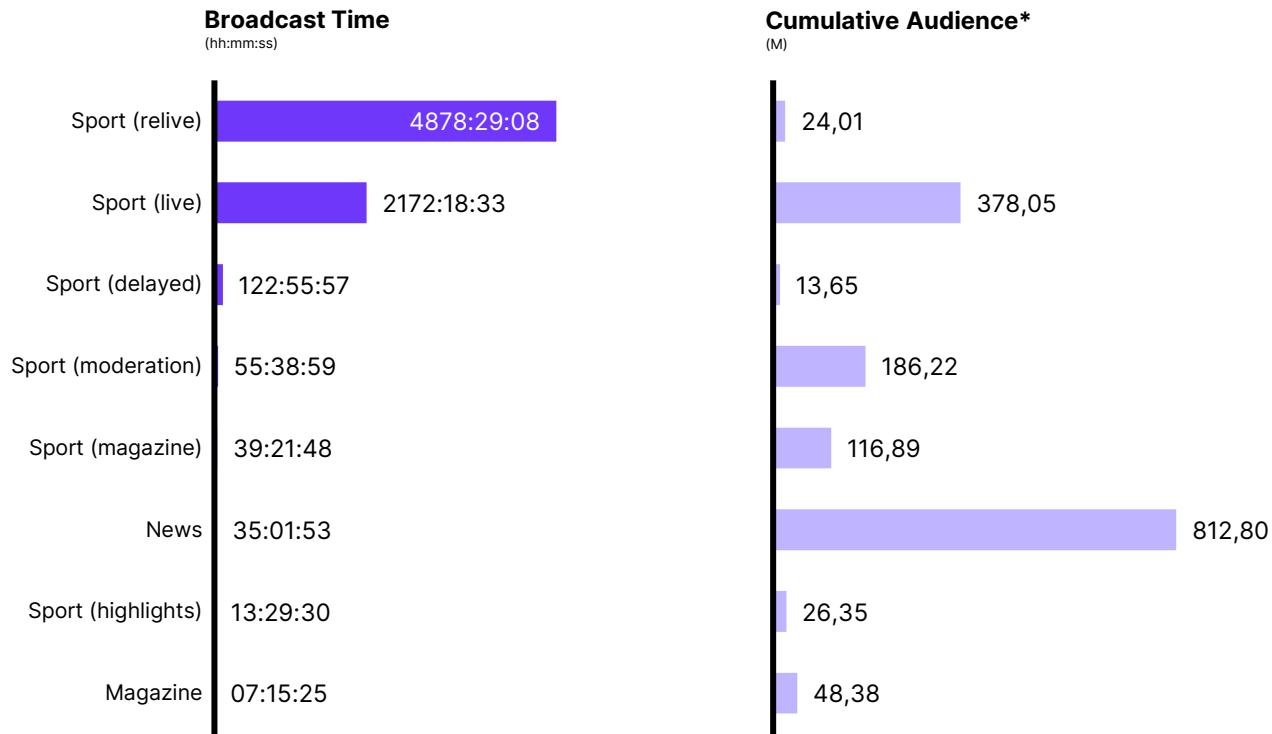


90% OF TOTAL

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

Media Monitoring

Ranking by program type



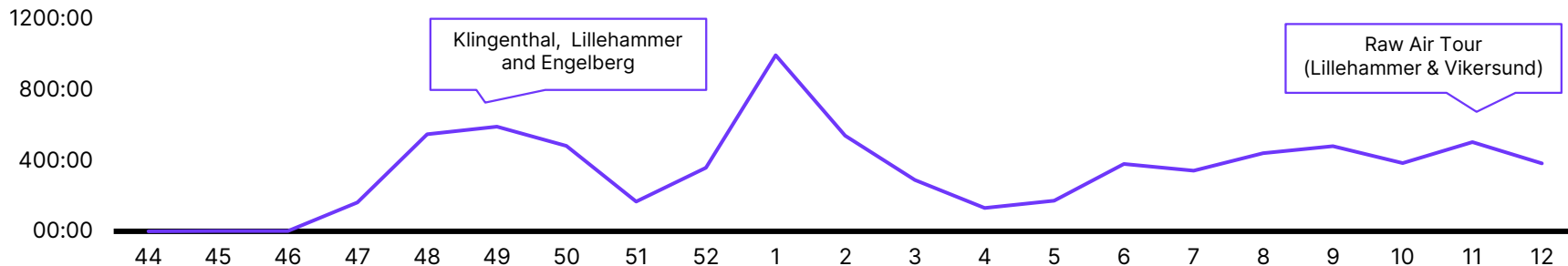
*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+ /Estimations by Nielsen Sports

Media Monitoring

Weekly coverage trend

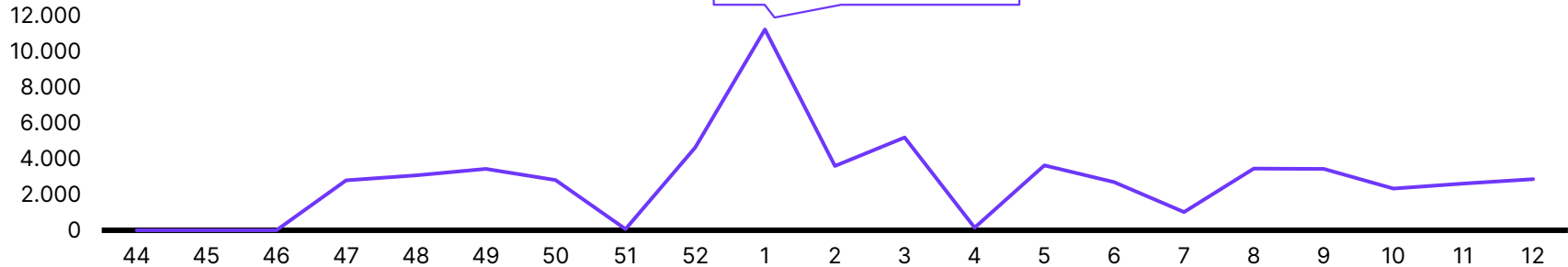
Broadcast Time

(hh:mm:ss)



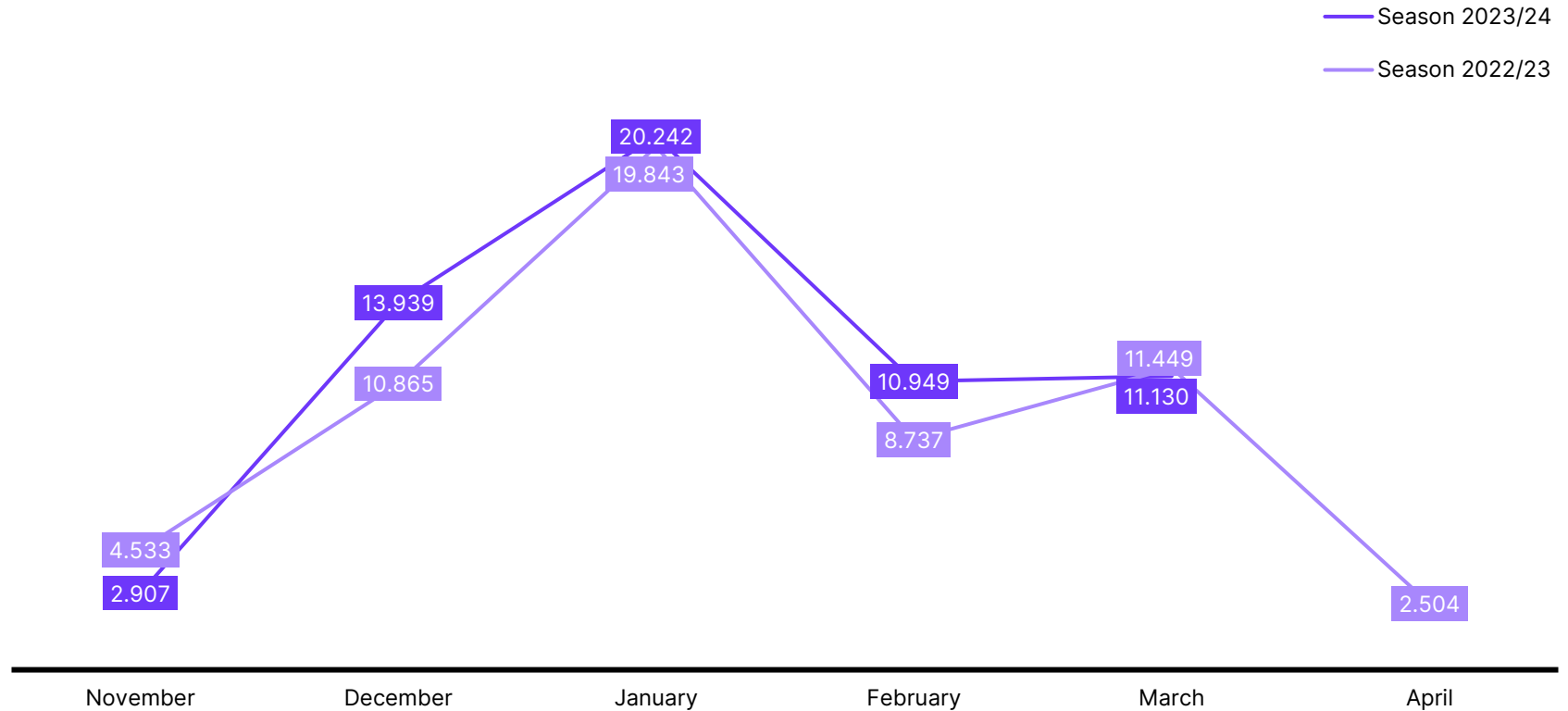
Event Impressions

(M)



Media Monitoring

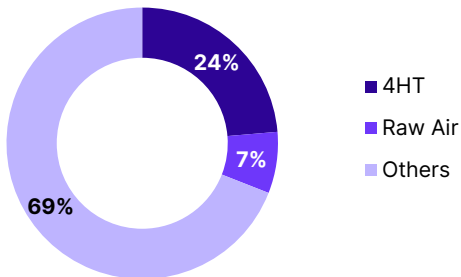
Season Comparison by Event Impressions



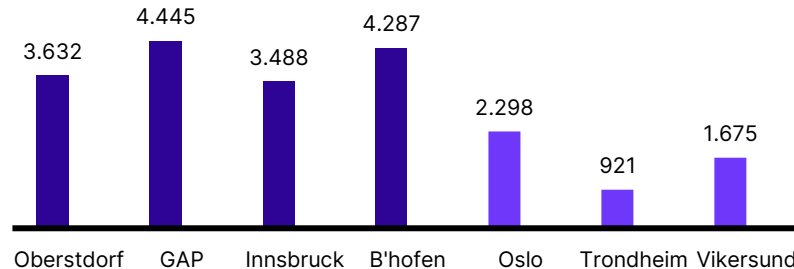
Media Monitoring

Focus on 4HT / Raw Air

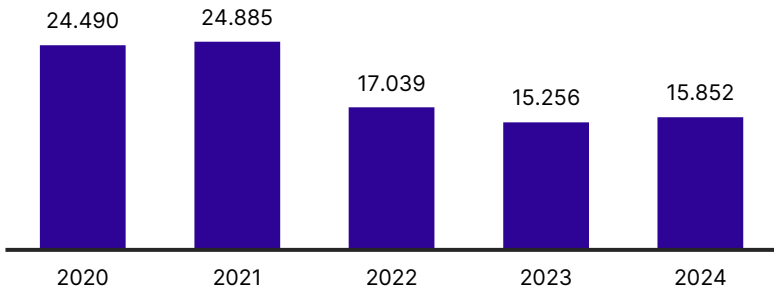
Event Impressions 2023/24 (M)



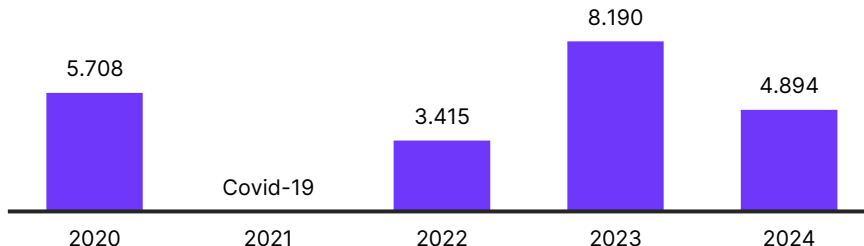
Event Impressions 4HT & Raw Air 2023/24 (M)



Event Impressions Timeline Four Hills (M)



Event Impressions Timeline Raw Air (M)



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:

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



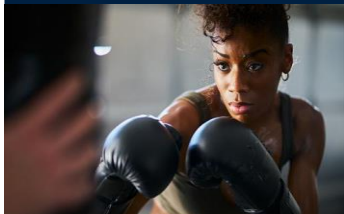
Nielsen Sports is the global leader in sports media valuation, data intelligence and research consulting.

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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