



FIS Freestyle Ski World Cup 2024/25

TV Media Evaluation – Event Summary



Expertise by Nielsen Sports
Your contacts: Alexander Karduck



Introduction

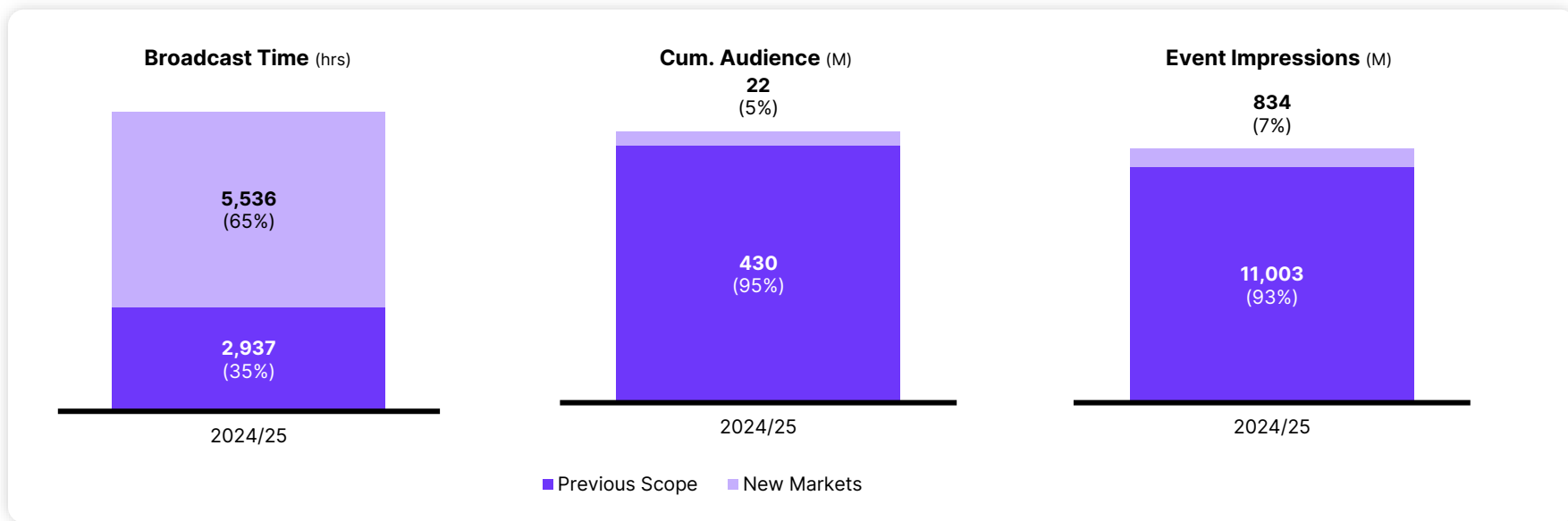
Study scope

Object of investigation/event:	FIS Freestyle Ski World Cup (M/W)
Monitoring period:	2024/25 Season
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 Freestyle Ski World Cup 2024/25

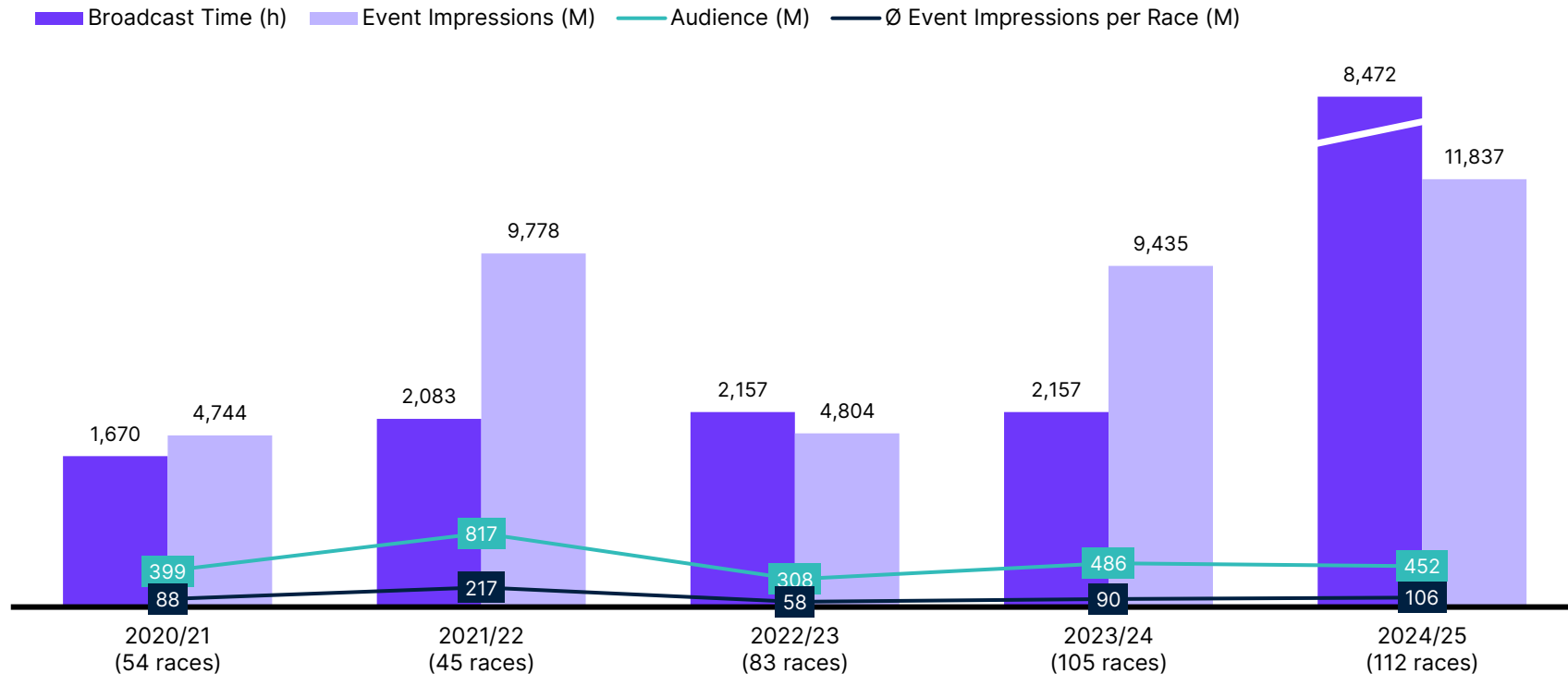
	Live	Non-Live	TOTAL	TOTAL 2023/24	TREND
Cumulative Audience* <small>(M)</small>	36	417	452	486	-7%
Number of Broadcasts <small>(#)</small>	3,480	10,804	14,284	4,051	+253%
Broadcast Time <small>(hrs)</small>	3,177	5,295	8,472	2,157	+293%
Actual Playing Time <small>(hrs)</small>	2,977	4,977	7,954	1,826	+336%
Event Impressions <small>(M)</small>	2,993	8,844	11,837	9,435	+25%

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

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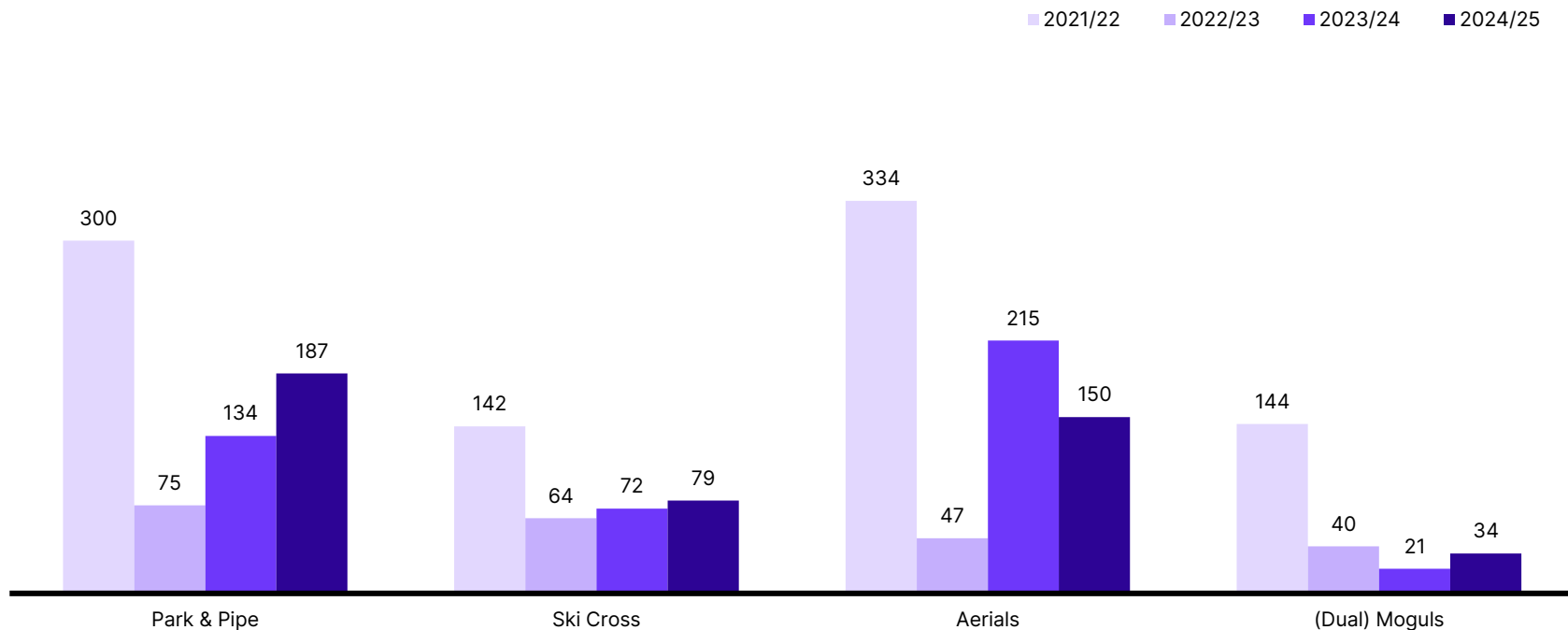
Management Summary

Season Comparison



Management Summary

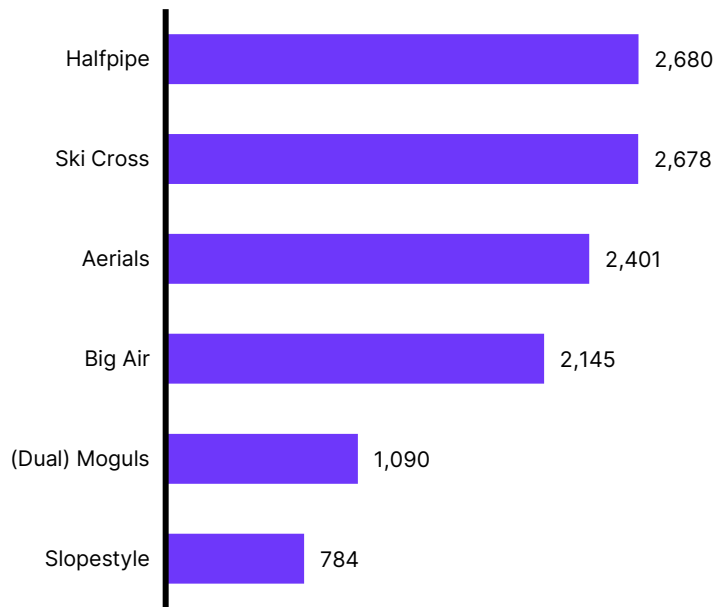
Avg. Event Impressions (M) per Race & Discipline – Trend Chart



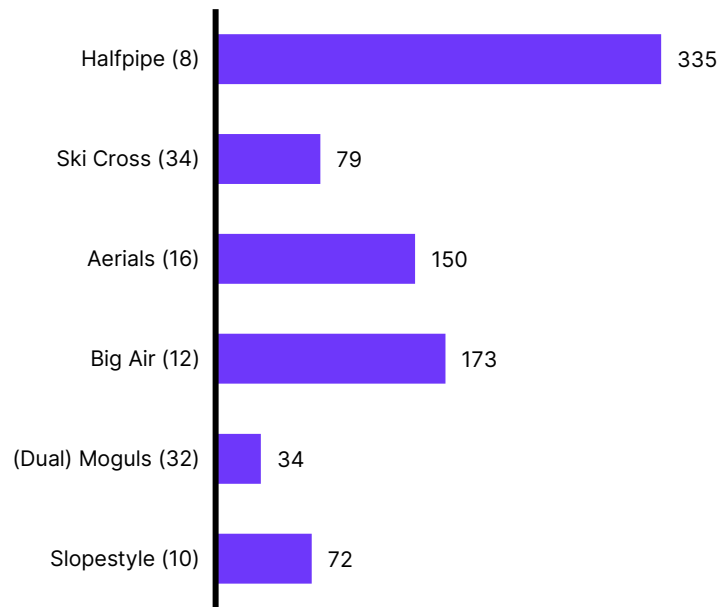
Management Summary

Event Ranking

Event Impressions (M)



Ø Event Impressions per race (M)



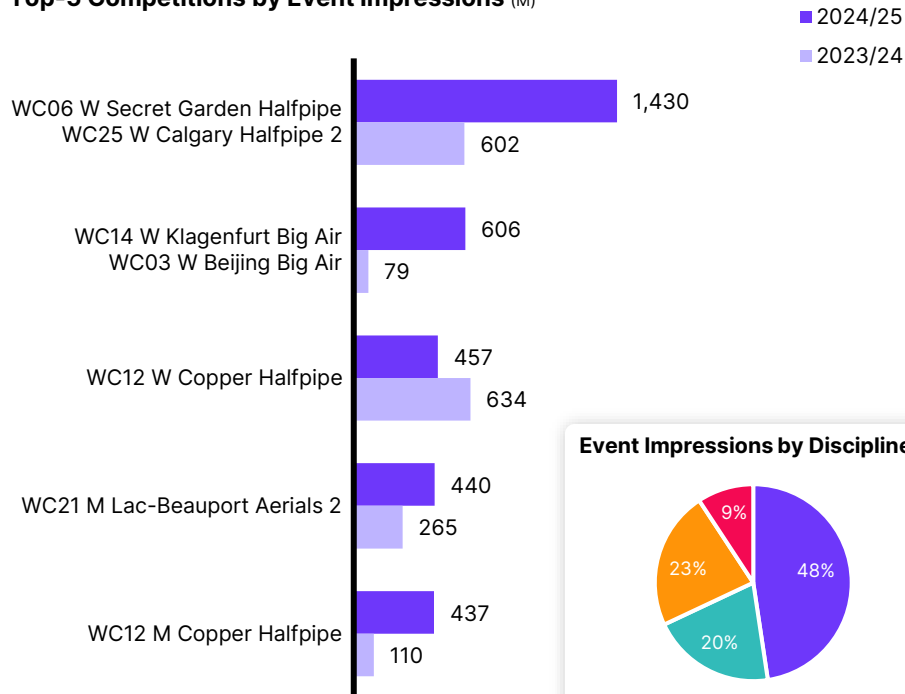
Management Summary

Key Takeaways

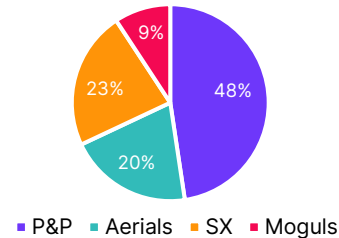
Key Takeaways

- Event impressions increase both overall (+25%) as well as on average per competition (+18%) compared to the previous season.
- Number of competitions increase for the third consecutive time, from 105 to 112 (+7%).
- Thanks to the positive development in top-markets China (+14%) and Germany (+56%), total media impact is the highest in history, even outperforming the 2021/22 Olympic season.
- Park & Pipe competitions prove to be especially popular (+60%) with China accounting for 78% of total numbers.
- China contributes 56% to the overall World Cup event impressions and even 91% when just looking at Aerials.
- Germany accounts for 46% of the Ski Cross media impact, well ahead of second placed France (13%). This discipline is also where Germany sees the greatest increase in event impressions YOY (+34%).
- Moguls remain the least popular discipline but its share of the total media impact increases from 7% to 9% YOY. France, Finland, and Italy are the top-markets here.

Top-5 Competitions by Event Impressions (M)



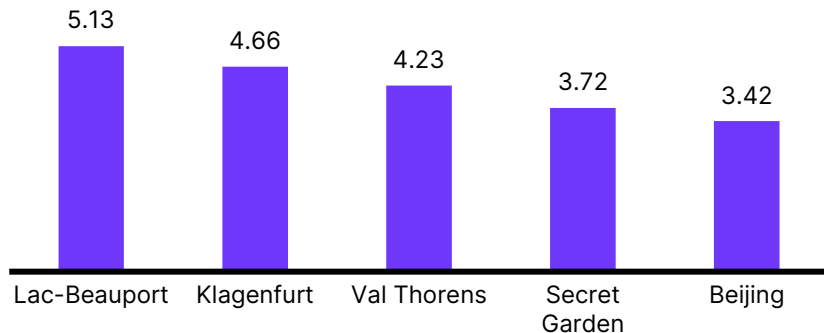
Event Impressions by Discipline



Management Summary

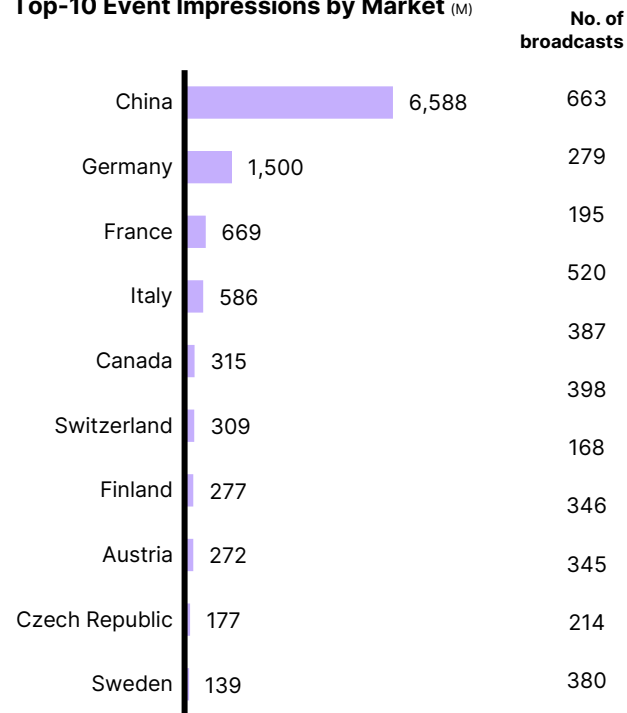
Media Monitoring

Top 5 Venues by Cumulative Live Audience* (M)



- Hosting two Aerials events this year, Lac-Beauport leads the ranking in terms of cumulative live audience (+4.97M). Broadcasts on Chinese CCTV5 are mainly responsible for this positive trends.
- Thanks to live coverage on ARD and ZDF, events in Klagenfurt (Big Air) and Val Thorens (SX) become the 2nd and 3rd most popular World Cups in the live viewership ranking.
- With broad and wide-reaching live coverage of Aerials and P&P, China is the top market in terms live audience (+12M). Dominated by SX coverage, Germany ranks 2nd, achieving 3.5M more live viewers than in the previous season.
- Czechia, newly added to the analysis scope, features in the top-10 markets by media impact, with Moguls & Ski Cross events being especially popular.

Top-10 Event Impressions by Market (M)



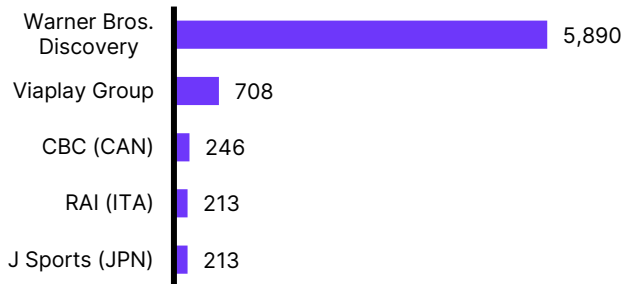
*Source: Mediametrie/Eurodata TV, The Nielsen Company, MMS, TNS Gallup /Adults 3+ /Estimations by Nielsen Sports

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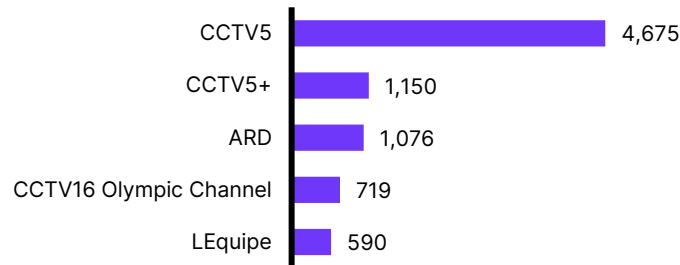
Management Summary

Media Monitoring

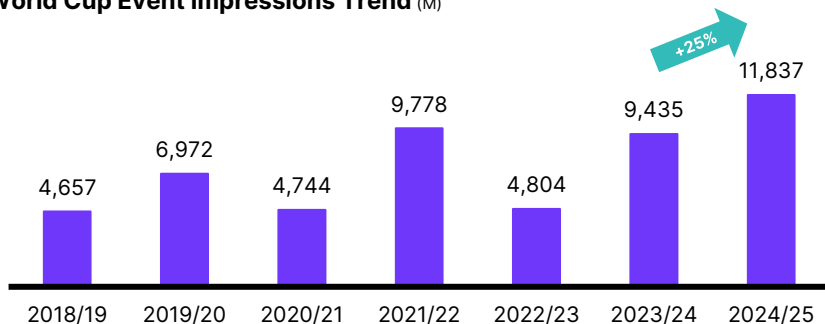
Top 5 Broadcasters by Broadcast Time (hours)



Top 5 Channels by Event Impressions (M)



World Cup Event Impressions Trend (M)



- With the Eurosport feeds being now accounted at a market level, the broadcaster WBD provided nearly 5,900 hours of coverage (70%), but only 2.5% of cumulative audience (11.4M) and 7% of event impressions (841M).
- Thanks to a broader coverage, CCTV5+ overtakes ARD and lands on 2nd in terms of event impressions. The Chinese channel generated 63% more media impact compared to previous season (+445M).
- Despite ranking 3rd this year, event impressions on German ARD increase by 33%, especially due to coverage of Ski Cross World Cups in Val di Fassa, Reiteral, Innichen and Veysonnaz.
- Streaming broadcasts – also new to the scope this season – account for 2% of the overall event impressions (230M), 0.4% of cumulative audience (1.9M) and 10% of broadcast time (837h).

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	271	0.15	142:50:58	135:41:14	10.11
Armenia	271	0.06	142:50:58	135:41:14	3.87
Austria	346	7.68	223:14:40	195:00:54	272.09
Azerbaijan	271	0.01	142:50:58	135:41:14	0.83
Belgium	565	0.38	304:09:17	288:56:10	23.42
Bosnia and Herzegovina	222	0.10	126:34:35	120:14:25	7.77
Bulgaria	231	0.34	130:06:52	123:36:04	26.81
Canada	387	4.73	247:05:19	234:42:02	315.07
China	663	231.89	282:41:53	268:29:29	6,587.92
Croatia	222	0.02	126:34:35	120:14:25	1.51
Cyprus	271	0.01	142:50:58	135:41:14	0.49
Czech Republic	345	9.44	210:28:11	190:27:46	176.74
Denmark	105	0.21	111:19:56	105:45:49	26.72
Estonia	222	0.06	126:34:35	120:14:25	4.16

*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	168	12.32	200:11:51	189:21:07	277.12
France	195	23.79	125:34:57	101:30:34	668.75
Georgia	271	0.09	142:50:58	135:41:14	5.87
Germany	279	75.27	129:23:37	116:54:32	1,499.68
Greece	271	0.06	142:50:58	135:41:14	3.72
Hungary	273	0.36	142:07:42	135:00:09	24.14
Iceland	271	0.00	142:50:58	135:41:14	0.12
Ireland	223	0.02	123:15:58	117:05:02	1.31
Israel	271	0.14	142:50:58	135:41:14	9.50
Italy	520	14.67	351:44:57	307:48:57	586.35
Japan	223	29.18	212:50:42	202:06:46	107.46
Kazakhstan	271	0.35	142:50:58	135:41:14	23.21
Kosovo	222	0.05	126:34:35	120:14:25	3.58
Kyrgyzstan	271	0.12	142:50:58	135:41:14	7.73

*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	222	0.06	126:34:35	120:14:25	4.79
Lithuania	222	0.08	126:34:35	120:14:25	5.84
Malaysia	232	0.02	130:48:29	124:15:57	1.88
Malta	263	0.01	147:14:33	139:52:21	0.60
Moldova	271	0.08	142:52:10	135:42:22	6.18
Montenegro	222	0.05	126:34:35	120:14:25	3.89
Netherlands	390	0.58	185:50:21	176:33:11	31.10
North Macedonia	222	0.06	126:34:35	120:14:25	4.14
Norway	265	1.25	302:57:45	287:28:03	58.33
Pan-Asia	122	0.41	67:11:53	63:50:14	30.73
Pan-Baltic	141	0.36	177:11:54	168:20:01	58.73
Pan-Latin America	101	0.22	86:22:08	80:19:22	22.23
Poland	380	5.49	225:59:56	214:33:14	126.04
Portugal	293	0.36	196:37:30	186:47:05	22.78

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

Media Monitoring

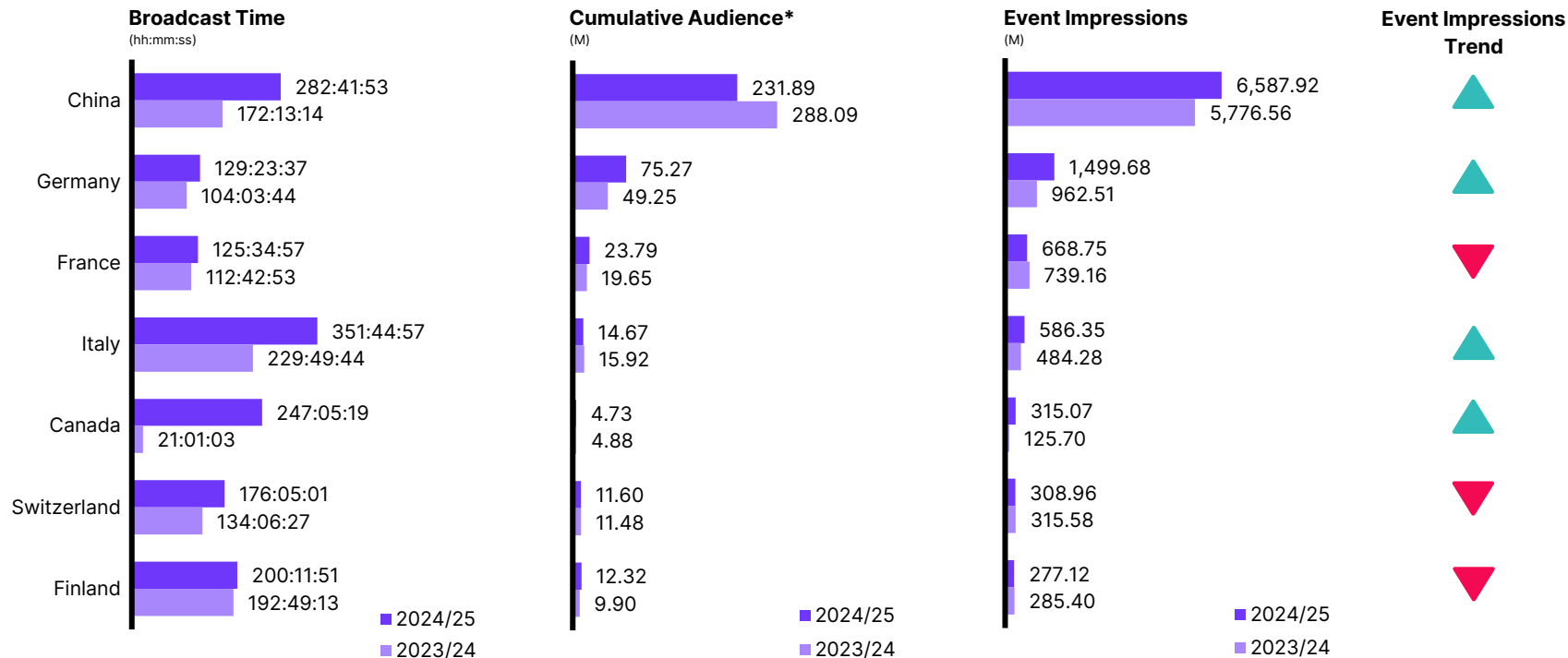
By country (in alphabetic order) (4/4)

Country	Number of Broadcasts (#)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Actual Playing Time (hh:mm:ss)	Event Impressions (M)
Romania	271	1.04	142:52:10	135:42:22	73.74
Serbia	222	0.32	126:34:35	120:14:25	23.83
Slovakia	325	0.78	157:47:25	149:52:40	16.93
Slovenia	218	0.25	125:36:37	119:14:43	16.42
Spain	216	0.17	119:54:43	113:54:02	12.34
Sweden	214	14.28	169:55:57	157:41:22	139.36
Switzerland	398	11.60	176:05:01	159:31:52	308.96
Turkey	271	0.51	142:50:58	135:41:14	35.27
Ukraine	271	0.05	142:50:58	135:41:14	3.35
United Kingdom	294	0.49	180:42:57	171:39:29	40.66
USA	117	2.36	88:46:57	81:45:20	112.49
TOTAL	14,284	452.37	8472:27:15	7954:13:37	11,836.68

*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 2024/25



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

Media Monitoring

Ranking by trending country

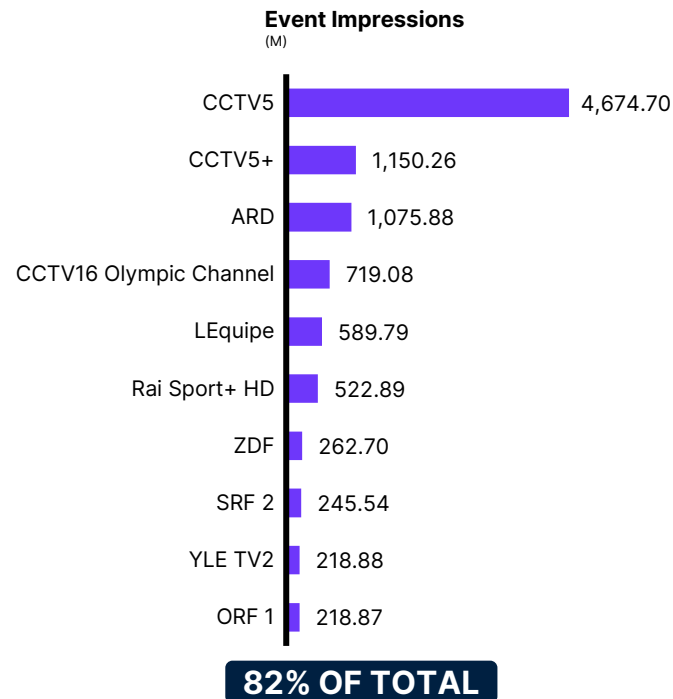
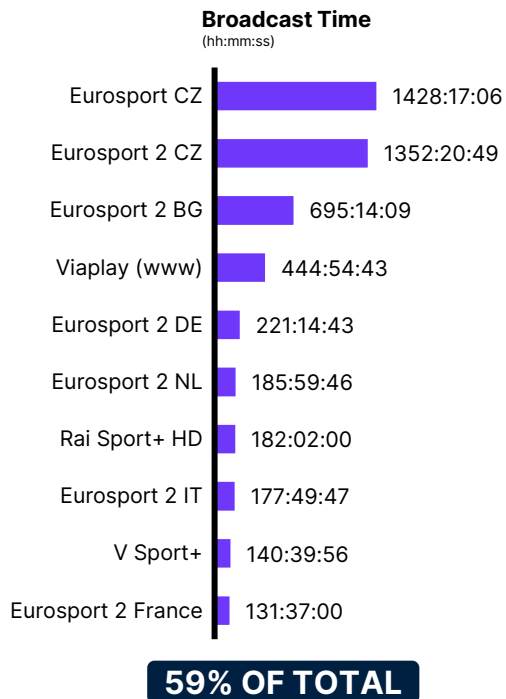
	2024/25			2023/24		
Country	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Event Impressions (M)	Cumulative Audience* (M)	Broadcast Time (hh:mm:ss)	Event Impressions (M)
China	231.89	282:41:53	6,587.92	288.09	172:13:14	5,776.56
Germany	75.27	129:23:37	1,499.68	49.25	104:03:44	962.51
France	23.79	125:34:57	668.75	19.65	112:42:53	739.16
Italy	14.67	351:44:57	586.35	15.92	229:49:44	484.28
Canada	4.73	247:05:19	315.07	4.88	21:01:03	125.70
Switzerland	11.60	176:05:01	308.96	11.48	134:06:27	315.58
Finland	12.32	200:11:51	277.12	9.90	201:24:01	221.38
Austria	7.68	223:14:40	272.09	6.51	210:45:44	170.28
Czech Republic	9.44	210:28:11	176.74	-	-	-
Sweden	14.28	169:55:57	139.36	32.51	192:49:13	285.40
Poland	5.49	225:59:56	126.04	-	-	-
USA	2.36	88:46:57	112.49	1.38	5:24:07	115.59
Japan	29.18	212:50:42	107.46	42.42	245:54:01	128.71
Romania	1.04	142:52:10	73.74	-	-	-
Pan-Baltic	0.36	177:11:54	58.73	-	-	-
TOTAL	444.11	2964:08:03	11,310.49	481.99	1630:14:11	9,325.15

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

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Media Monitoring

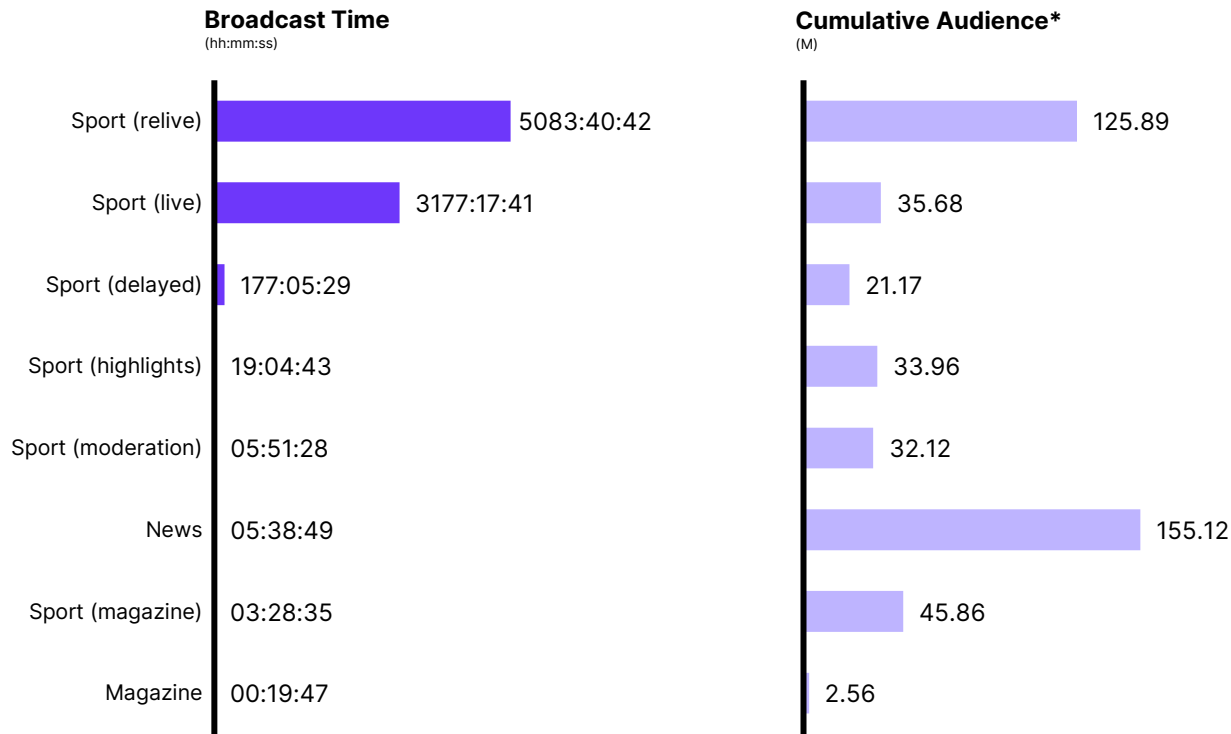
Top 10 channels



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

Media Monitoring

Ranking by programme type

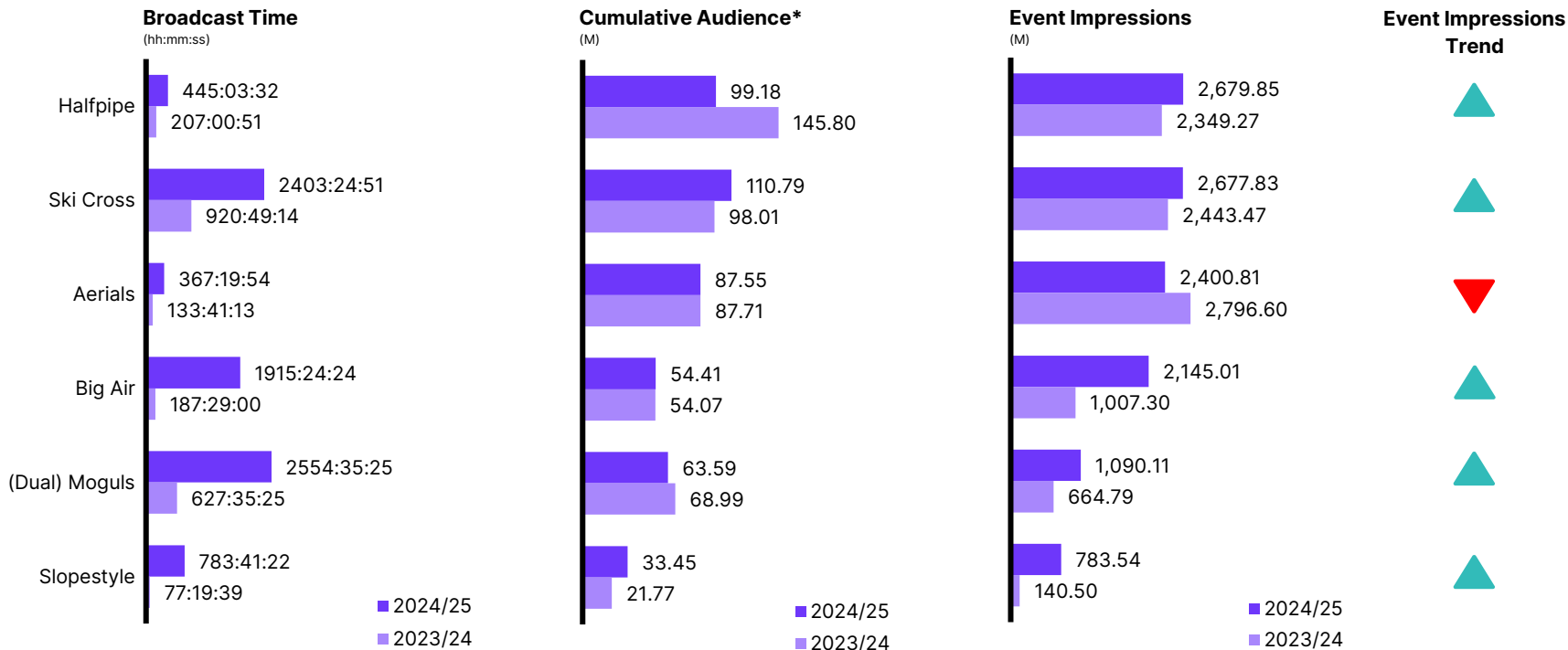


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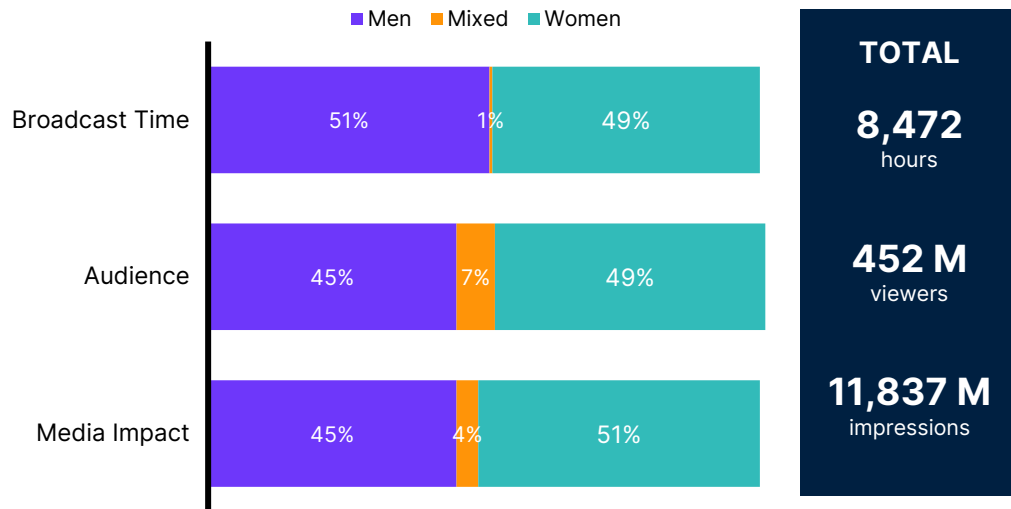
Discipline YOY (ranked by event impressions 2024/25)



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

Media Monitoring

Gender comparison

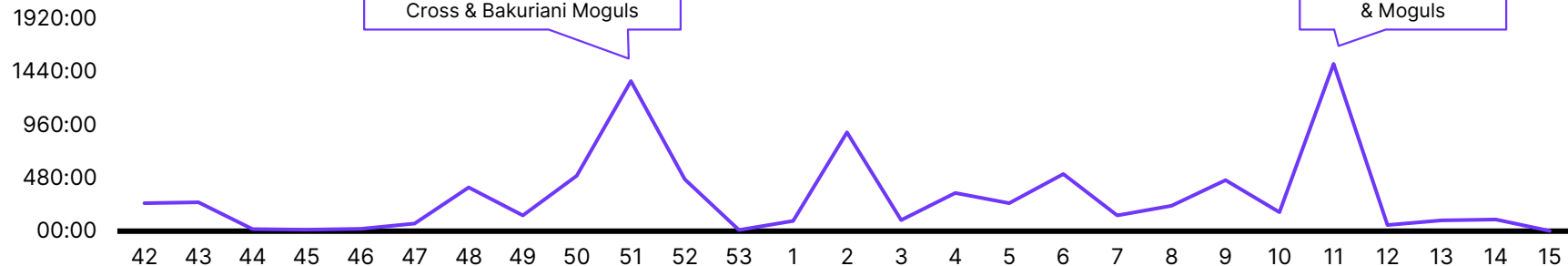


Media Monitoring

Weekly coverage trend

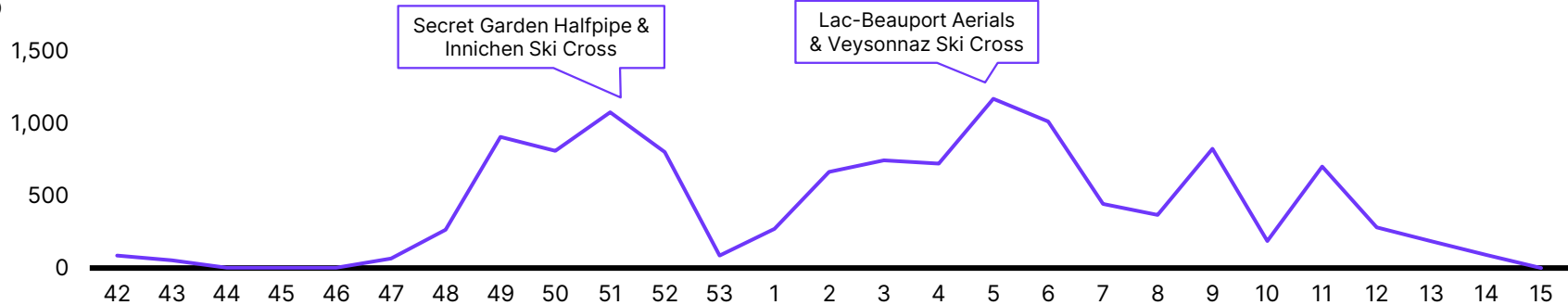
Broadcast Time

(hh:mm:ss)



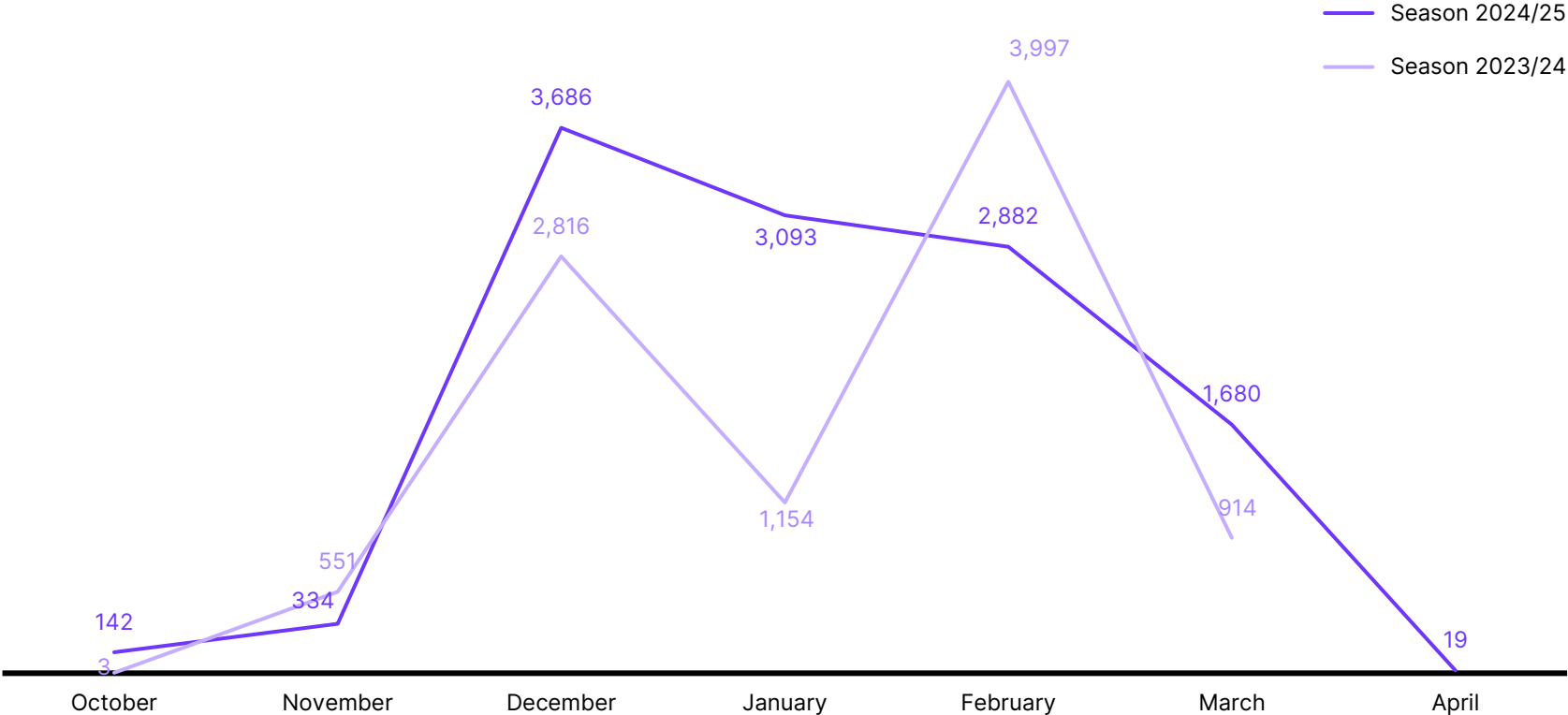
Event Impressions

(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.
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:

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



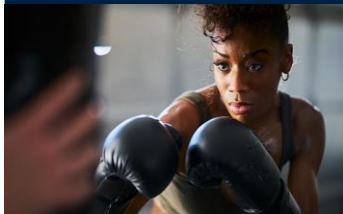
Nielsen Sports is the global leader in sports media valuation, data intelligence and research consulting.

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.

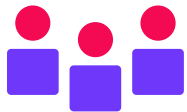
Innovative



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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