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## NAGANO OLYMPIC WINTER GAMES MARKETING PROGRAMME ANALYSIS

The 1998 Olympic Winter Games in Nagano, Japan, were declared to be the best-organised Winter Games in Olympic history by IOC President Juan Antonio Samaranch. Despite adverse weather conditions, the Organising Committee produced an exciting event, with seven new world records and eight Olympic records broken.

From a marketing and broadcast perspective, the Nagano Games were also a big success. The marketing programmes met all objectives and the Olympic television broadcast reached more countries than ever before.



“The Nagano Olympic Winter Games have been a perfect example of how the private and public sectors can work together,” said IOC Vice President and Marketing Commission Chair Richard W Pound. “The financial, technological and promotional support from sponsors and broadcasters has made an essential contribution to the success of these Games, providing an infrastructure without which it would not have been possible to stage the Games, without any form of commercial excess.”

### Broadcast

Preliminary analysis indicates that the Nagano Olympic Winter Games were broadcast in more countries and territories than ever before, and that the cumulative audience in 26 major markets was 9.2 billion, 13 percent greater than the 8.1 billion viewers in these markets for the 1994 Lillehammer Games. The global cumulative audience is expected to equal the 1994 total of 10.7 billion viewers, despite challenging time zone differences for the lead North American and European markets and event scheduling difficulties experienced as a result of bad weather. Total coverage was up, with hours broadcast increasing 55 percent over Lillehammer.

MAJOR MARKET CUMULATIVE AUDIENCE  
(IN MILLIONS)

	Nagano	Lillehammer	Difference
Japan	1,780.3	759.8	+134%
Canada	192.7	87.2	+121%
Australia	49.1	21.2	+132%
Korea	574.6	122.6	+368%
South Africa	7.2	1.5	+380%
Brazil	97.0	24.7	+293%
Mexico	95.5	21.1	+352%
United States	1,261.8	1,668.0	- 24%
Spain	19.9	16.2	+ 23%
France	299.2	435.4	- 31%
Norway	49.3	66.2	- 26%
Eurosport	205.7	60.0	+243%



Record audience levels in the Asia-Pacific region and in other regions where the Games were broadcast extensively for the first time made up for decreases in the United States and some European markets. Japan, Korea, Australia, New Zealand, South Africa, Brazil, Mexico, Canada, and European markets such as Spain are among the countries where record coverage and audience levels were set.

- Over 82 million Japanese viewers watched the Opening Ceremony – 69 percent of the total potential viewers (120 million), the highest audience figure.
- The Olympic Winter Games were broadcast live in Australia for the first time.
- Average prime-time rating in South Korea was up 20 percent to 19.7 from the 1994 16.5 rating average.
- Total cumulative audience in Canada more than doubled (+120 percent).
- In France, the figure skating highlights, broadcast on TF1 on February 22, was the highest-rated sports programme of the past year.

### Sponsors

The Nagano marketing programme was the most successful of any Olympic Winter Games to date. The programme generated over US\$300 million in revenues – three times that of the 1994 Lillehammer Games and close to five times the original bid forecast.

Sponsor product, service and personnel support helped ensure smooth Games operations, especially in the fields of technology, food service and spectator management. Additionally, the 11 worldwide Partner companies provided direct support to the 72 participating national Olympic teams.

Sponsor advertising and marketing programmes also served to help promote the Olympic Movement.

### Tickets and Spectators

The Nagano Games became the largest Winter Olympics ever, with 2,304 athletes and officials from 72 countries and regions participating in 68 events watched by 1,275,529 ticketed spectators. (Lillehammer competitors

totalled 1,739 from 67 countries competing in 61 events.) The Nagano ticket holders were joined by an additional 167,200 spectators to cheer on the medalists at the Award Ceremonies. A new record of 88.9 percent of tickets sold surpassed the 87.3 percent sold at Lillehammer.

	No. of Tickets Sold	% Sold
1998 Nagano	1,275 529	88.9
1994 Lillehammer	1,233,000	87.3
1992 Albertville	900,000	75.0

### Presences Marketing and Ambush Activity

The Organising Committee worked closely with city authorities and sponsors to develop a programme to complement the “Look of the Games” design. These initiatives focused on avoiding commercial excess while at the same time enhancing the “visual” experience for the spectator and television viewer.

Ambush activity in Nagano was virtually non-existent.

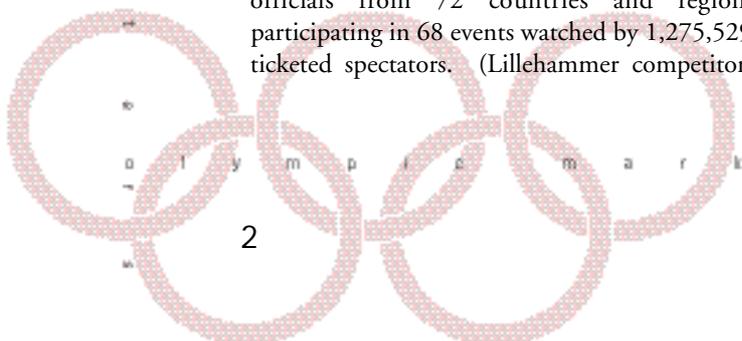
As USA Today (February 16, 1998) described: “The 1998 Games may be remembered as the first in a decade when ambush ad wars didn’t take center stage on site. These (were) the polite games.”

### Licensing

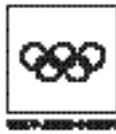
Licensed product sales were so strong that demand far exceeded supply. The “SNOWLETS” established themselves as the most popular and successful Olympic Winter Games mascots to date and became the hottest items in Nagano, with all stocks sold out early in the Games.

For the first time in the history of Olympic Games coverage, the IOC licensed the production of a large-format (70mm) film, “Olympic Glory,” which documents the Nagano Olympic Winter Games. The film will premiere in late 1998, in New York and Japan.

The Nagano coin programme generated more than US\$500 million for the Japanese government and contributed to the financing of the Games.



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## Internet and the Olympic Games

The NAOC website ([www.nagano.olympic.org](http://www.nagano.olympic.org)) was the first Olympic Winter Games to provide enthusiasts with a system for viewing real-time results and information, offering the largest, most comprehensive, most heavily-used Internet-based technology application in history. The site, produced and powered by IBM, handled a record 646 million worldwide hits over the course of the Games, with response time down to a fraction of a second. This is compared to the 187 million hits received by the 1996 Atlanta site.

A global Internet milestone of 103,429 hits per minute was set on Friday, February 20, at 9:00pm/21.00 (Japan Standard Time) during the simultaneous staging of two high-profile events: women's figure skating long programme and the semi-final ice hockey game between Russia and Finland. This surpassed the record set only three days earlier during the K120 ski jumping competition, won by Japan, when traffic soared to a then-record 98,224 hits per minute after the winning jump at noon.

The IOC unveiled its new website, [www.olympic.org](http://www.olympic.org), on February 6. This new website will serve as the focal point for Olympic related information and help promote the Olympic Movement worldwide. The website attracted immediate attention and in the first two weeks of operation was voted "Best Olympic Site" by Web Review magazine and "shocked site of the day" by Macromedia (awarded for web site design and development).

Traffic on the Internet in general increased substantially during the period of the Games, compared to the prior 16 days. CBS SportsLine had a 245 percent increase in its number of visitors, CNN/SI experienced a 190 percent increase and ESPN SportsZone visits were up 120 percent.

**[www.nagano.olympic.org](http://www.nagano.olympic.org)**

- **646 million hits during the Games**
- **Peak: 103,429 per minute on February 20**
- **Response time: less than one second**

### **Key Nagano Olympic Winter Games "Marketing Firsts":**

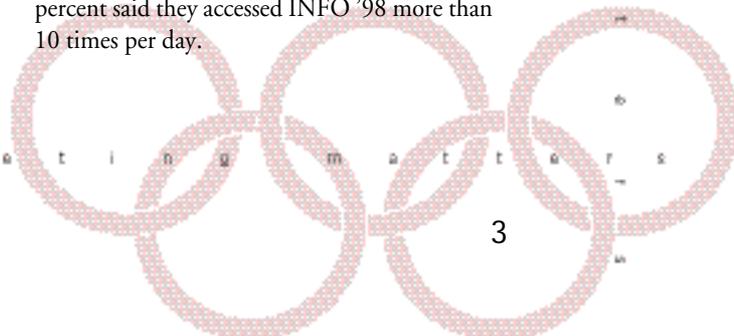
- Winter Games on Internet
- Television coverage throughout Latin America and Africa
- Increase in number of host broadcaster hours to 500
- Video-on-Demand of sports events
- Panasonic giant screen video display in every competition venue
- Large-format (70mm) film of a sports event
- Ticket sales reached 88.9 percent

## **SPONSOR PROGRAMMES: SUPERIOR TECHNOLOGY AND RESPECT FOR THE ENVIRONMENT ARE THE NAGANO LEGACY**

### Technology wins gold in Nagano

The success of the partnership between the Olympic Movement and the technology sponsors set the criteria for future Games. This consortium of sponsors offers state-of-the-art expertise in areas ranging from computers to telecommunications and provides a wide range of products and services. Some of the key technology contributions made by the sponsor companies at the Nagano Games include:

- The results system developed by NAOC and IBM processed over one terabyte (one trillion bytes) of data during the Games. This is more than five times the 200 million bytes processed in Lillehammer.
- Over six million information requests were logged on INFO '98, compared to two million in Lillehammer, including 1.8 million results viewed, 1.1 million biography hits, one million news articles viewed and 280,000 e-mails sent. INFO '98 was produced by IBM.
- In a survey conducted among journalists at the Main Press Centre in Nagano, over 90 percent said they received results data for their work from INFO '98 and over 60 percent said they accessed INFO '98 more than 10 times per day.





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- The Commentator Information System (CIS), developed by IBM, provided results and statistics from every event to 1,100 touch-screen displays used by thousands of journalists in the competition venues. The average response time was estimated at .35 seconds, with over two million messages processed.
- More than 1,500 athletes created personal home pages at the IBM Surf Shack in the Olympic Village. More than 250,000 good-luck messages from around the world were received by athletes via IBM's on-site program, FanMail.
- Kodak ran the world's largest photo lab during the Games and processed more than 2,700,000 images.
- Panasonic provided 20 giant video display screens for installation in all competition venues. This was the first time that these giant screens had been available for spectators at every Olympic Games sporting venue.
- Panasonic supplied 73 Video-on-Demand terminals at competition sites and 24 other locations. Visitors could select from 500 hours of sporting action from both the Nagano Games and the Olympic archives in French, English or Japanese.
- The entire broadcasting process – from acquisition and local transmission to production and international broadcasting – was digital, and Panasonic provided state-of-the-art high-definition broadcast and super-slow-motion equipment.
- The wireless communications technology supplied by Samsung and NTT provided communication access unavailable at prior Games. Over 10,000 digital cellular phones, high-speed flex pagers, personal handy phones and two-way radios were provided to officials, athletes, media, staff and volunteers.
- Xerox provided and serviced more than 2,000 fax machines, copiers, printers, and multifunctional (combination fax/copier/printer) machines. The multifunction machines were placed at 20 venues and 14 competition sites in response to space limitations.
- Timing equipment by Seiko captured results and new records at all sporting venues. Their

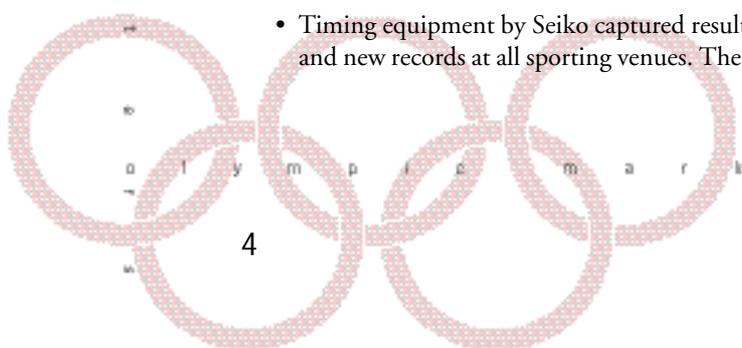
new "visual distance measuring system" aided officials by using high-speed colour cameras to provide images of ski jumpers at the rate of 100 frames per second. This yielded the fastest and most accurate performance reports, and the "split video" timing offered more excitement to the television viewer.

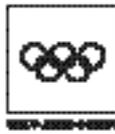
- Over 10,000 technical and service personnel from the Olympic Partners provided the support needed to ensure a smooth running of all the technology components during the Games.

Worldwide Olympic Partner	Category
The Coca-Cola Company	Non-Alcoholic Beverages
IBM	Information Technology/Computers
John Hancock	Life Insurance/Annuities
Kodak	Film/Photographics and Imaging
McDonald's	Retail Food Services
Panasonic	TV/Video/Audio Equipment
Samsung	Wireless Communications Equipment
Sports Illustrated/Time	Publications
UPS	Express Mail/Package Delivery Services
Visa	Consumer Payment Systems (credit cards, etc.)
Xerox	Document Processing

*"The critical challenge facing the Olympic Movement is to preserve the values associated with the Games while at the same time deriving revenue from business partners and returning value to the corporate sector."*

– IOC Marketing Director, Wall Street Journal (February 6, 1998)





## Sponsor Support Essential to Games Success

In addition to the technology support provided by TOP and Gold Partners, sponsor contributions in all areas greatly enhanced the success of the Nagano Games. The product, service and personnel support for NAOOC was the greatest ever for a Winter Olympic Organising Committee. Environmental concerns led to innovative solutions and product applications. And Partner marketing programmes were successful on all fronts.

Sponsor programmes impacted all facets of the Games:

- McDonald's served the athletes 25,000 meals.
- Kodak supplied X-ray film and medical imaging equipment to help speed medical treatment for injured athletes.
- Coca-Cola sponsorship helped present the Torch Relay to over 5.6 million people.
- Six million pins traded hands in Nagano during the Games, and more than 150,000 pins were sold at the Coca-Cola Pin Trading Center, double the number in 1994 and a record for the Olympic Winter Games.
- Mizuno provided the 32,579 volunteers with uniforms.
- Samsung invited 1,700 athletes to "Call Home" free. More than 2,500 calls were made to 43 countries.
- UPS supported sport development with an "Olympic Sports Legacy" Programme, which delivered sports equipment to underprivileged children on five continents prior to the Opening Ceremony, and an Athlete Training Assistance Programme (ATAP), which helped Olympic hopeful employees.
- Visa again supported the Cultural Olympics with the "Olympics of the Imagination" children's art competition, bringing the 26 winners to the Games.
- During the Games, the Wall Street Journal awarded medals for television advertising, giving Coca-Cola an "Individual Gold" for their "Ice Hockey" commercial and IBM the "Team Theme Gold" for their "Look for Me" campaign.

## Sponsor Programmes Support NAOOC "Pay Homage to Nature" Goal

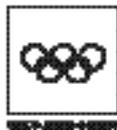
- All processing effluents were treated by Kodak to recycle the silver and cleanse chemicals before release.
- McDonald's employee uniforms were made from recycled plastic bottles, and sandwich wraps were made from a grass-based paper.
- Panasonic equipment was made with recycled parts and worked at decreased energy consumption levels.
- Xerox copiers used recyclable parts and wrapping materials.
- Mizuno used recycled materials in their uniforms: NAOOC fleece pullovers were made from PET bottles, and the polyester thread came from 240,000 recycled plastic bottles.
- Coca-Cola and McDonald's provided hundreds of container recycling bins for the Olympic venues.

## Sponsor business results reflected the success of their programmes:

- Kodak operated film and processing centres for spectators, experiencing a 375 percent market share increase during the Games.
- The Visa Service Centre provided services to athletes and spectators. According to preliminary assessments, Visa card payments in Nagano accounted for 20-40 percent of transactions with some merchants, against an average level in Japan of 2 percent. International ATMs in Nagano dispensed ¥175 million (US\$1.5 million) during the Games.

*"Since the 1993 announcement of (John) Hancock's Olympic sponsorship, 99 percent of all agencies have participated in Hancock's Olympic programmes and events... Aggressive (Olympic) advertising and public relations campaigns have helped strengthen the company's brand equity. That enhanced brand equity has translated into increased sales and a competitive edge in everything from promotional opportunities and client relationship-building to employee recruiting."*

— John Hancock 1997 Annual Report



# 1998 BROADCAST ANALYSIS REPORT: PRELIMINARY RESULTS

Results reported to the IOC by Sports Marketing Surveys indicate that the 1998 Nagano Olympic Winter Games were broadcast in more countries and territories than any other Winter Games, setting a new record for global coverage. The cumulative audience in 26 major market areas exceeded Lillehammer's record level by 13 percent, and global cumulative audience is expected to equal or exceed Lillehammer's 10.7 billion cumulative viewers. This is a remarkable achievement given the challenging time zone differences for the lead North American and European markets and the event scheduling difficulties as a result of bad weather.

Total global television coverage increased 55 percent. Latin America experienced the greatest increase in coverage hours (+1,244 percent versus Lillehammer) due to the expanded availability of the broadcast – more than 45 countries received the Winter Olympic Games for the first time.

GLOBAL TELEVISION COVERAGE

	1998 Nagano (total hours)	1994 Lillehammer (total hours)	Difference
Asia-Pacific	1,449	336	+331%
South America	242	18	+1,244%
North America	812	321	+153%
South Africa	276	29	+852%
Europe	3,362	3,239	+ 4%
<b>TOTAL</b>	<b>6,141</b>	<b>3,943</b>	<b>+ 55%</b>

## ASIA-PACIFIC

Significant audience increases and record viewership levels were experienced throughout the Asia-Pacific region.

### Japan

- For the first time, coverage was provided by the commercial broadcasters TBS, NTV, CX, ANB and TX, in addition to NHK.

- Total coverage of 506 hours was seven times that of Lillehammer (73 hours).
- Total cumulative audience increased to 1.8 billion viewers, up 135 percent (vs. the 1994 audience of 760 million).
- Highest-rated programme: NHK live coverage of the Opening Ceremony was the most-watched sports programme of the past year, with 43 million viewers (35.8 rating/60 percent share). Including rebroadcasts, over 82 million Japanese viewers watched the Opening Ceremony.

## South Korea

- Record coverage of 426 hours increased more than 200 percent over the 1994 coverage of 141 hours. Prime-time coverage increased dramatically, at 64 hours vs. four hours in 1994.
- Average prime-time ratings increased to 19.7, up 20 percent from the 1994 16.5 ratings average.
- Total cumulative audience was 575 million viewers, up 370 percent from the 122 million viewers in 1994. Cumulative prime time audience was 341 million viewers, vs. 23 million in 1994.
- Highest-rated programme was the men's 1,000m short track speed skating event which attracted 11.1 million viewers (24.0 rating).

## Australia

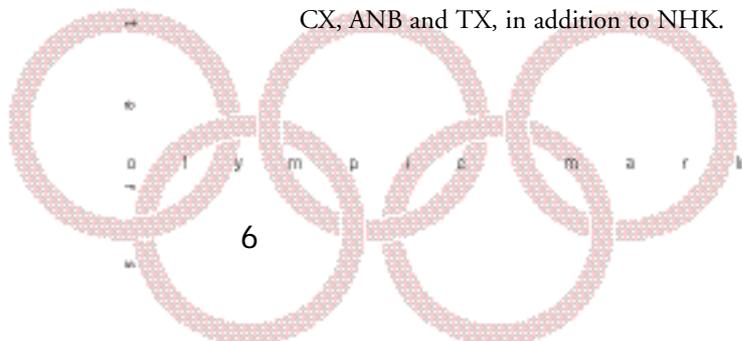
- Winter Games broadcast live for the first time.
- A total broadcast of 337 hours.
- Total cumulative audience increased 90 percent to 40 million, vs. 21 million viewers in 1994.
- Highest-rated programme was Opening Ceremonies, with 2.4 million viewers.

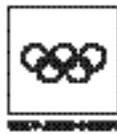
## China

- Preliminary information estimates the total cumulative audience at more than one billion viewers and over 100 hours of coverage.

## AMERICAS

Overall, the Olympic broadcast reached record levels in much of this region, with coverage available for the first time virtually everywhere in Latin America. Audience levels increased in many countries, and record ratings





occurred in Canada. In the United States, ratings declined from the exceptionally high levels achieved during the 1994 Lillehammer broadcast, although CBS did achieve their highest-rated sports programme of the past year.

**Brazil**

- Total cumulative audience was 100 million, vs. 25 million viewers in 1994.
- Highest-rated programme was Olympic Highlights (February 12), with 6.1 million viewers, vs. a high of 4.6 million in 1994.

**Mexico**

- For the first time, prime-time coverage was offered in Mexico with 24 hours of coverage.
- Total coverage increased to 228 hours (vs. 18 in 1994), with the addition of TV Azteca coverage to that of Televisa.
- Total cumulative audience was 270 million, vs. 21 million in 1994.
- Highest-rated programme was Opening Ceremonies, broadcast simultaneously on both Televisa and TV Azteca, which attracted 10.6 million viewers.

**Canada**

- Total coverage was 635 hours. Coverage by CBC totalled 284 hours, vs. 156 hours by CTV in 1994. Much of the sports coverage was live, and some programmes broadcast in the middle of the night drew strong audiences.
- Total cumulative audience more than doubled to 192 million viewers vs. 87 million in 1994 (+120 percent), despite time zone differences and event scheduling problems.
- The Canada-USA men's ice hockey match, broadcast after midnight on February 15, achieved an audience of 2.5 million viewers (CBC English), one of the highest-rated programmes of the Games (8.7 rating). The gold medal 1994 Canada-Sweden match achieved a rating of 12.8 and an audience of 3.2 million.

**US**

- Audiences were down (1.3 billion cumulative viewers) from the exceptionally high levels achieved in 1994 (1.7 billion cumulative viewers). However, the Nagano Games did rank as the third most-watched

television event in the US after the 1996 Centennial Olympic Games (205 billion cumulative viewers) and the 1994 Lillehammer Olympic Winter Games.

- The Olympic Games broadcast was the highest-rated programme for each of the 17 days. CBS was the highest-rated network during this period.
- Highest-rated programme was women's figure skating (February 20), with 59 million viewers (23.2 rating/38 percent share). This was also CBS's highest-rated sports programme of the past year.
- Over 70 percent of all television viewers watched some or all of the Olympic Winter Games coverage.

**US Unduplicated Audience  
(in millions)**

1998 NAGANO	184
1994 LILLEHAMMER	204
1992 ALBERTVILLE	184

“Broadcast coverage of the winter Olympics from Japan helped first-quarter profits at CBS beat analysts’ predictions and produced record operating results at the television and radio group’s stations ... Revenues rose 47% ... and the radio business, the biggest in the US, outperformed the rest of the industry during the quarter.”

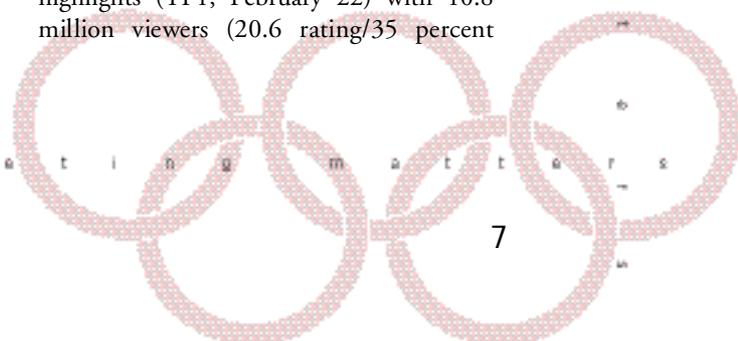
– Financial Times (May 1, 1998)

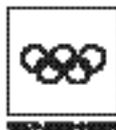
**EUROPE**

In Europe, live coverage could not be broadcast in prime time, due to time zone differences. As a result, cumulative audiences were projected to be substantially down from 1994. Preliminary results show, however, that in some markets, audiences and coverage were stronger than expected.

**France**

- Total coverage increased by 48 hours to 164 hours, versus 116 hours broadcast in 1994 (+41 percent)
- Highest-rated programme was figure skating highlights (TF1, February 22) with 10.8 million viewers (20.6 rating/35 percent





share). This programme was also the highest-rated sports programme in France over the past year. It also exceeded the audience for the World Cup 1998 Draw (10 million, 19.1 rating), which was the top rated programme of 1997.

### Germany

- Total coverage increased by 37 hours to 225 hours, vs. 188 in 1994 (+20 percent).
- Highest rated programme was "Olympia Live" (February 16), which attracted 5.8 million viewers (8.2 rating/22 percent share).

### Spain

- Cumulative audience was 20 million viewers, up 25 percent from 16.2 million in 1994.
- 52 hours of coverage were broadcast by LA2, versus 26 hours on TVE2 in 1994.

### Norway

- Total coverage was 284 hours, up 30 hours from the 254 hours broadcast in 1994.
- Television audiences were approximately 70 percent of their 1994 level, when Norway hosted the Games.

### Eurosport

- Eurosport provided over 17 hours of coverage per day, but this was down from the 24 hours broadcast from Lillehammer in 1994.
- Total cumulative audience was over 206 million viewers, vs. 60 million in 1994 (+243 percent).

### AFRICA

Through URTNA and M-Net, more countries in Africa received coverage of the Winter Games than ever before. As a result, total coverage and cumulative audiences are projected to reach record-breaking levels.

### South Africa

- Total cumulative audience on SABC was over 7.2 million people, versus 1.5 viewers in 1994 (M-Net).
- Coverage was up, at 276 hours compared to 29 hours in 1994.

## OLYMPIC GAMES BROADCAST COMPARISONS

There has been considerable media debate over the difference in broadcast coverage of the Olympic Games and the World Cup. The following is a breakdown of broadcast statistics for the two events. The research was compiled using similar measurement methodology and is based on official Olympic Games and World Cup broadcast analysis results.

<u>Event</u>	<u>Number of Countries Broadcasting</u>
1996 Olympic Games	214
1998 Olympic Winter Games	160 (est.)
1994 Olympic Winter Games	120
1994 World Cup	188
1990 World Cup	167

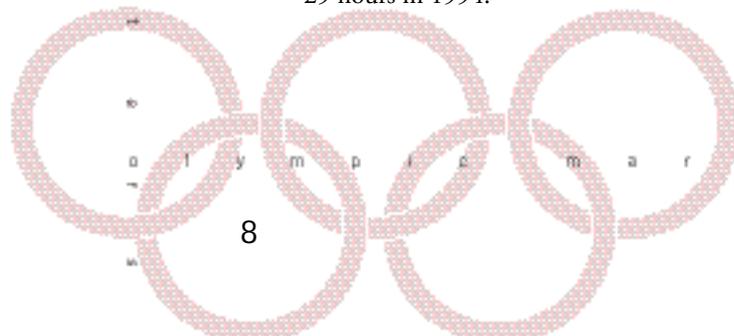
Source: SMS/SRi

### Broadcast Coverage

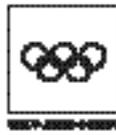
<u>COUNTRY</u>	<u>EVENT</u>	<u>HOURS</u>
Japan	1998 Olympic Winter Games	506
	1996 Olympic Games	220
	1994 Olympic Winter Games	73
	1994 World Cup	40
	1990 World Cup	44
Germany	1998 Olympic Winter Games	225
	1996 Olympic Games	520
	1994 Olympic Winter Games	188
	1994 World Cup	81
	1990 World Cup	83
UK	1998 Olympic Winter Games	100
	1996 Olympic Games	297
	1994 Olympic Winter Games	71
	1994 World Cup	102
	1990 World Cup	124
US *	1998 Olympic Winter Games	126
	1996 Olympic Games	170
	1994 Olympic Winter Games	164
	1994 World Cup	25
	1990 World Cup	52

\* Network coverage only. Does not include cable.

Source: SMS/SRi



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**Cumulative Audience in Major Markets  
(in Millions)**

	<u>1996 Olympic Games</u>	<u>1994 World Cup</u>
<b>EUROPE</b>	1,367	1,365
UK	327	304
France	315	175
Germany	298	354
Italy	264	390
Spain	163	142
<b>NORTH AMERICA</b>	2,630	228
US	2,515	212
Canada	115	16
<b>LATIN AMERICA</b>	3,416	3,218
Argentina	192	213
Brazil	2,384	2,417
Mexico	840	588
<b>ASIA</b>	2,915	564
Hong Kong	130	38
Indonesia	308	321
Japan	1,897	57
Korea (South)	302	93
Thailand	93	41
Australasia	185	14
<b>TOTAL</b>	<b>10,328</b>	<b>5,375</b>

Source: SMS/SRI

**AMBUSH MARKETING:  
UNDER CONTROL IN  
NAGANO**

The Nagano Olympic Winter Games have been referred to by many as the first ambush-free Games in recent years. Ambush marketing instances outside of Japan were few in number and resolved almost immediately. This increased level of effectiveness is a result of the IOC's long-term strategy of structuring its marketing programmes in a manner that limits the opportunities for ambush.

The lack of ambush activity during the 1998 Games is due, in part, to the close partnership between the Organising Committee and the City of Nagano, who worked together to

enforce a stringent anti-ambush plan. It is also due to the stronger partnership in the advertising arena between the official broadcasters and the Olympic sponsors.

*“Corporations have come to realise that ambush marketing activities bring more negative results than benefits. Ambush is more than an ethics issue. It has become a business decision. Parasite marketing must continue to be viewed as an unacceptable tactic by the media, the consuming public and business peers.”*

– Michael Payne, IOC Marketing Director

**RESEARCH RESULTS**

Research Shows Nagano Games a Success

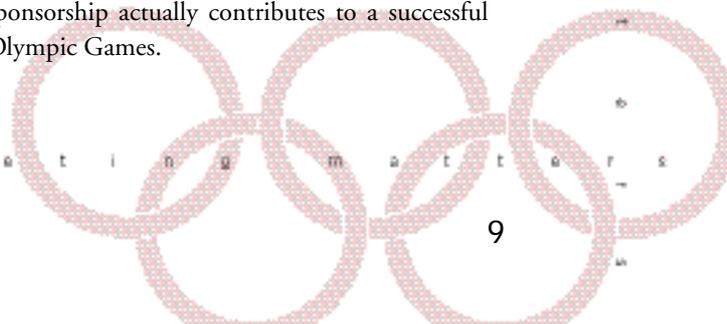
Recent research results among athletes attending the 1998 Olympic Winter Games and among the Japanese population show strong positive attitudes towards the Games.

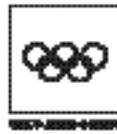
**ATHLETE RESEARCH**

Athletes responding to the research survey conducted during the 1998 Nagano Games expressed strong positive attitudes about the Olympic Winter Games and the role of sponsorship. 380 athletes from 34 countries participated in the study.

89 percent agreed that the Olympics are the “world’s top sporting event.” Almost three-quarters thought that the Olympic Games are the “most important moment of my sporting career so far” (72 percent).

There was also overwhelming support for the role that sponsorship plays and an understanding that “without sponsorship, the Games could not be held these days” (87 percent of athlete respondents were in agreement). There was also an 82 percent acceptance rate that sponsorship actually contributes to a successful Olympic Games.





Not only is sponsorship seen as essential for staging the Games, but almost eight in ten athletes (79 percent) also thought that sponsorship was important in their training. 78 percent thought that sponsorship was important to their National Olympic Committee and has helped to finance national Olympic teams. (The number of athletes with personal sponsorship agreements represented 40 percent of the total sample.) Only 19 percent agreed that "sponsorship has a detrimental effect on the Games and Teams." This is down from the 32 percent agreement among athletes at the 1996 Atlanta Games.

On a practical level, Olympic sponsors are seen to help support sport development (70 percent agreement) and athlete training needs (62 percent). While 72 percent agreed that Olympic sponsors are an important part of the Olympic Family, some athletes did question the goodwill of Olympic sponsors, with 10 percent agreeing strongly that they were "in it only for self-promotion." Overall, 88 percent were favourable towards sponsorship of the Olympic Games.

**ATTITUDES TOWARDS OLYMPIC SPONSORS**

	<u>% agree</u>
- Without sponsorship, the Games could not be held	87
- Sponsorship contributes greatly to a successful Olympics	82
- Sponsorship is important in my training	79
- Sponsorship is important to my NOC	78
- Sponsorship helps to finance the national teams at the Games	78
- Sponsorship has a detrimental effect on Games and teams	19
- Sponsorship helps support sport development	70
- Sponsorship helps athletes' training needs	62

Source: SRi

**JAPAN RESEARCH**

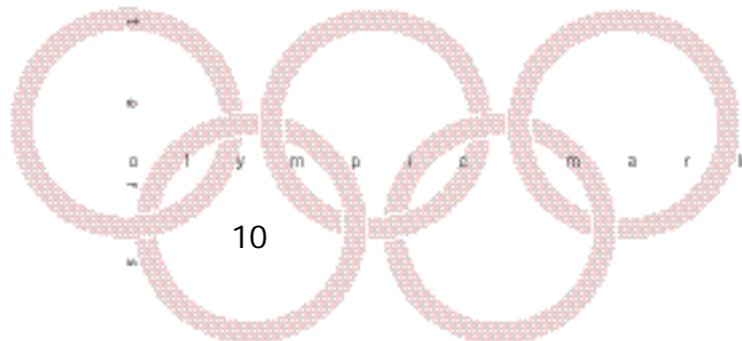
A study conducted by Dentsu Research Inc. directly after the Nagano Olympic Winter Games Closing Ceremony (February 22), revealed that 95 percent of the people surveyed considered the Nagano Olympics "a success." The research surveyed 600 men and women aged 13-69 living in Tokyo and in Nagano Prefecture.

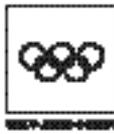
98 percent replied that the Games were "interesting," and 99 percent said that they had watched the Games on television. 85 percent saw the Olympics "every day."

	<u>% Tokyo</u>	<u>% Nagano</u>
<b>Q. Do you think that the Nagano Olympics were a success?</b>		
Yes	95.4	95.0
<b>Q. Did you watch the Olympic sports competition on television during the Nagano Games?</b>		
<input type="checkbox"/> Watched a number of times a day	45.2	51.0
<input type="checkbox"/> Watched once a day	39.6	38.0
<input type="checkbox"/> Watched some	13.8	10.0
<input type="checkbox"/> I did not watch Games on television, but I saw the results in the newspaper	1.0	1.0
<input type="checkbox"/> I did not watch Games on television, and I don't know the results	0.4	0.0
<input type="checkbox"/> Total percentage that viewed Games	98.6	99.0
<input type="checkbox"/> Total percentage that did not view Games	1.4	1.0

Source: Dentsu

The athletic events and performances at the Games were a major topic of conversation at home (68 percent), with friends and acquaintances (48 percent) and at school or work (41 percent). 76 percent of the respondents said they were "overcome with emotion" while watching the Games, with the top three "emotionally moving events" being the team ski jumping, men's 500-meter speed skating and the large hill ski jumping.





All the competitions included in the survey showed high rankings for having been watched through “live broadcasts,” “recorded programmes,” “news programmes,” “digest programmes” or “highlights shown the following day.” From this it can be deduced that many viewers watched events more than once, while others “channel surfed” to see the same scenes over and over. 53 percent of the respondents said they “watched the competitions on TV with their family,” indicating that the Games appealed to all ages and that both men and women watched the events. 50 percent said they “watched during work breaks” and 45 percent reported that they “watched different programmes from those they would normally.” 23 percent said they “bought newspapers other than those they would normally” (30 percent for males), indicating that many people watched the action on television and then read about it in the newspaper. 10 percent of the people in Tokyo and 31 percent in Nagano said they also “read about the Games action in newspaper extra editions.” 13 percent said they “bought a magazine that contained an Olympic special feature.”

## OLYMPIC UPDATES

### NOC Marketing Education Programme Launched By IOC

The IOC recently announced an educational programme of seminars and handbook/video materials to enhance the understanding and application of marketing by the National Olympic Committees. To date, seminars have been conducted at selected NOCs. The programme will be presented to all 198 NOCs at the ANOC meeting to be held in Seville in June.

### Olympic Television Rights

Recently, the IOC announced agreements with CBC and two cable networks in Canada for US\$160 million. The package encompasses both English and French language broadcasts and cable rights for the next five Games: 2000 - 2008:

### BROADCAST RIGHTS FEES: CANADA

Olympic Games	Total (\$US millions)
2000 Sydney	28
2004 Athens	37
2008 ?	45

### BROADCAST RIGHTS FEES: CANADA

Olympic Winter Games	Total (\$US millions)
1998 Nagano	16
2002 Salt Lake City	22
2006 ?	28

The African rights to the 2000 Sydney Olympic Games were sold to URTNA (SABC and M-Net) for US\$12 million.

With these deals concluded, the television rights fees generated for the 2000 Sydney Olympic Games total US\$1.3 billion.

### GLOBAL TELEVISION REVENUES \*

Olympic Games	Total (\$US millions)
1996 Atlanta	895
2000 Sydney	1,322.5
2004 Athens	1,476.5
2008 ?	1,690.8

\* Rights fees negotiated to date

### GLOBAL TELEVISION REVENUES \*

Olympic Winter Games	Total (\$US millions)
1998 Nagano	513
2002 Salt Lake City	748
2006 ?	833

\* Rights fees negotiated to date

### Correction –

The broadcast rights fees for Salt Lake City published in issue 12 of **Marketing Matters** was US\$726 million. Please note this figure is the gross – the total rights fees negotiated at that time for 2002. The correct figure for SLOC’s share is US\$447 million.



## ORGANISING COMMITTEE UPDATES

### Sydney Licensing Programme to be Extended Globally

As a result of the success of the Sydney licensing programme in the Australian market, the IOC and SOCOG have agreed to extend the programme on an international basis. This programme will be presented to the National Olympic Committees during the meetings in early June in Seville.

### Research shows Olympic Games impact tourism

Recent Australian Tourist Commission research, in which more than 2000 potential US

travellers were surveyed, shows that about 47 percent of respondents wanted to travel to Australia because Sydney was an Olympic host city.

### Economic Impact of 2002 Winter Games Projected

The Utah Governor's Office of Planning and Budget has recently released a report estimating that the 2002 Olympic Winter Games will contribute over \$3 billion to the state's economy and will create 23,000 jobs, with workers taking home \$970 million in Olympic-related wages. Additionally, local governments are projected to receive between \$80-140 million over the next five years.

## FOR MORE INFORMATION CONTACT

INTERNATIONAL OLYMPIC COMMITTEE	SYDNEY ORGANISING COMMITTEE FOR THE OLYMPIC GAMES	SALT LAKE ORGANISING COMMITTEE FOR THE OLYMPIC GAMES	ATHENS ORGANISING COMMITTEE FOR THE OLYMPIC GAMES
Château de Vidy 1007 Lausanne, Switzerland Tel: 41.21.621.6111 Fax: 41.21.621.6216	Sydney NSW Australia Tel: (61.2) 9297.2000 Fax: (61.2) 9297.2020	Salt Lake City USA Tel: (1.801) 212.2002 Fax: (1.801) 364.7644	Athens Greece Tel: (30.1) 324.0004 Fax: (30.1) 323.2004
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Fékrou Kidane <i>Director, Department of International Cooperation and Public Information</i>	Karen Webb <i>Marketing Communications</i>	Don Stirling <i>Marketing Director</i>	
Elizabeth McMahon <i>Marketing Services</i>		OPUS / USOC John Krinsky <i>Deputy Secretary General and Managing Director Business Affairs</i>	
		Tel: (1.719) 578.4640 Fax: (1.719) 319.9683	

### Internet Sites



IOC  
[www.olympic.org](http://www.olympic.org)



Sydney  
[www.sydney.olympic.org](http://www.sydney.olympic.org)



Salt Lake  
[www.SLC2002.org](http://www.SLC2002.org)



Athens  
[www.athens2004.gr](http://www.athens2004.gr)

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