

Sponsorship decisions, simplified.

Property Effectiveness Recap

Which brands owned the podium at Tokyo 2020?



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Methodology

3,500 consumer interviews conducted in four countries

TIMING

August 9 – August 16, 2021

SAMPLE

13- to 64-year-olds; representative of age, gender, region

SAMPLE SIZES



N=1,000



N=500



N=1,000



N=1,000

METHODOLOGY & DEFINITIONS

SponsorPulse's **Property Effectiveness Report** plus data from sponsorpulse.com platform.



ENGAGEMENT: % of people who have engaged with the property in the past 12 months.



INTENSITY: % of people who interact with the property on a weekly basis, among engaged.

Highlights and Key Findings

Major highlights



TURMOIL LEADING UP TO GAMES

With the Games delayed a full year and many in the host country concerned about hosting, Tokyo 2020 were an Olympics like no other.



NO FANS IN STANDS

An Opening Ceremony with a backdrop of empty seats meant cheers came only from teammates and coaches.



NEW EVENTS

Surfing, skateboarding, speed climbing, and the return of baseball and softball added new life to the lineup in 2020.



TOYOTA BACKS OUT

Concerns about hosting led worldwide IOC partner Toyota to pull home-country advertising a month before the Games began.

Top performing countries

1.		United States	39	41	33	113
2.		China	38	32	18	88
3.		Japan	27	14	17	58
4.		Great Britain	22	21	22	65
5.		ROC	20	28	23	71

The challenge for brands

The divisive decision to go ahead with the Games while consumer behavior was disrupted (or permanently altered) by the pandemic presented a challenge for worldwide IOC partners and national Olympic partners unique to Tokyo 2020.

Would long-standing partners be able to convert their equity to breakthrough? Would national partners be able to successfully activate after facing delays and disruption?

Sponsorship gold – who won in three key markets?



NIKE

Nike dominated the US sponsorship podium, not only on breakthrough, but also impact.

Runner-Up: Coca-Cola



ADIDAS

Adidas finished on the podium on virtually every metric, often just behind various UK brands.

Runner-Up: Samsung



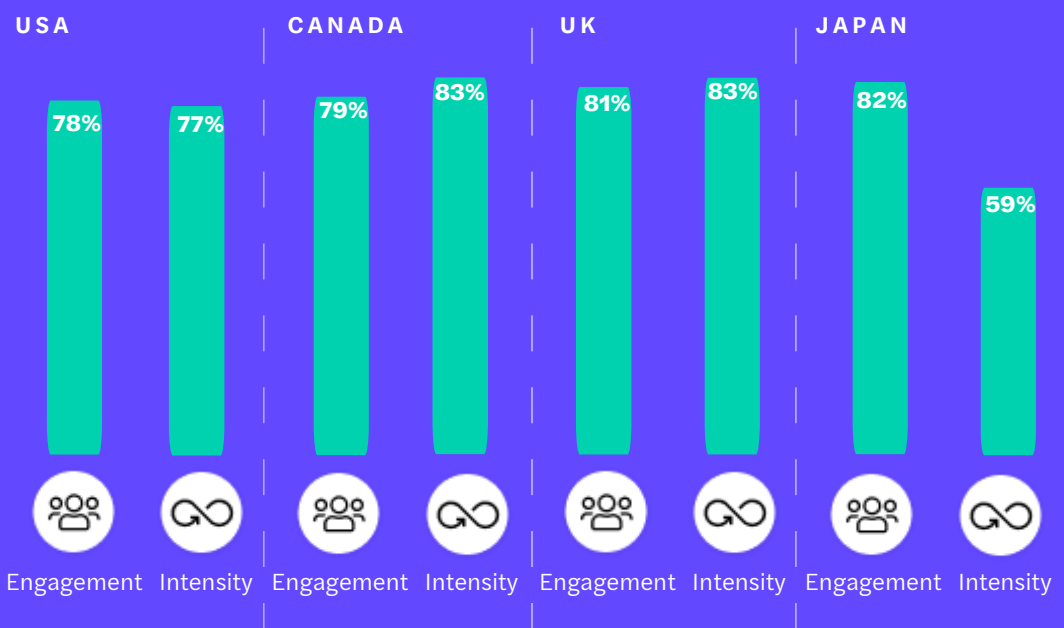
TOYOTA

Toyota's equity in Japan and with the Games delivered a podium finish on four-of-five brand metrics.

Runner-Up: Coca-Cola

The Power of the Olympic Games

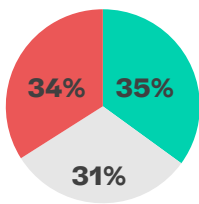
Engagement with the Tokyo 2020 Olympic Games was relatively high, with nearly 8 in 10 consumers engaging across all measured countries. Intensity followed suit but was far lower in the host country of Japan, where controversy remained.



Was it the Right Decision to Go Ahead?

The host country was still divided, even after the Games wrapped, while attitudes in other markets were more positive – though still far from consensus.

JAPAN



Only 35% of Japanese respondents agreed it was the right decision to host the 2020 Games.

■ Agree ■ Neither ■ Disagree

USA



CANADA



UK



How Did Worldwide IOC Partners Fare?



Competing with national partners, media partners, and brands without any official standing, Coca-Cola, VISA, and Toyota still broke through

Japan showed the strongest connection to worldwide partners, with both VISA and Toyota – despite pulled advertising – gracing the podium. Coca-Cola failed to grab gold in these three markets but is a ubiquitous presence in consumer’s minds when it comes to the Games.

Sponsor Breakthrough – Unaided Awareness



DNF: Did Not Finish. Too few unaided mentions to rank

Country Spotlight: USA

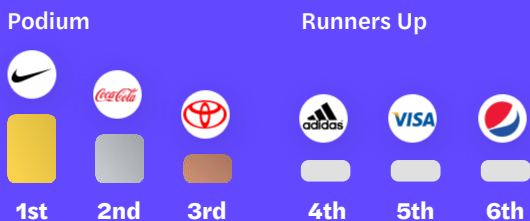


Nike takes home gold on four-of-five metrics, while many other brands have a strong showing

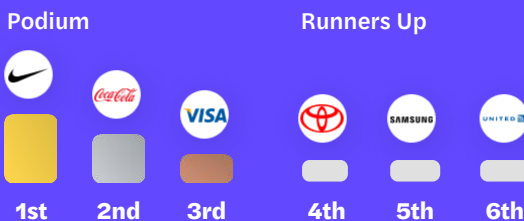
While Nike tops nearly every metric in the USA, several CPG brands (led by Coca-Cola) make the podium on impact among those aware. Even without the visibility of major IOC partners, brands like Hershey's and Milk Life succeeded at driving medal-worthy impact among those they reached.

Sponsor Breakthrough

UNAIDED AWARENESS

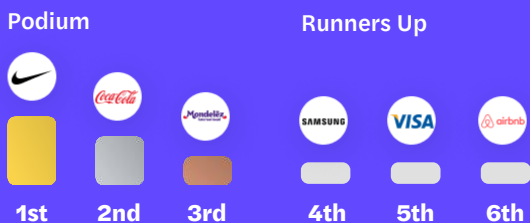


AIDED AWARENESS



Impact

IMPACT ON BRAND FAVORABILITY



IMPACT ON PURCHASE/USAGE



IMPACT ON BRAND IMAGE



Impact on brand image is an average of the impact on the following questions:

- Is the brand for people like me?
- Does the brand support my community?
- Is the brand getting better?
- Is the brand a leader?

Country Spotlight: United Kingdom

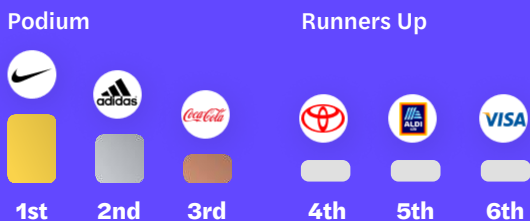


Nike and Coca-Cola share gold on breakthrough; British Airways, Samsung, and McVities earn top spot for various impact measures

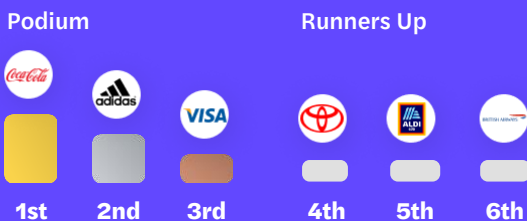
Major international partners like Nike, Adidas, Coca-Cola, Toyota, and VISA dominated breakthrough in the UK but several national partners broke through, including ALDI and British Airways. These UK partners (including McVities) also drove impact among those aware on par with IOC partners.

Sponsor Breakthrough

UNAIDED AWARENESS

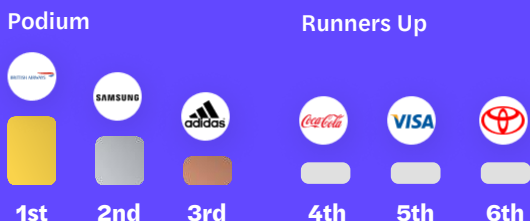


AIDED AWARENESS

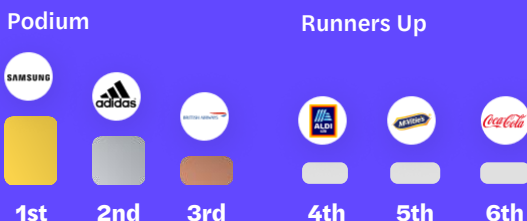


Impact

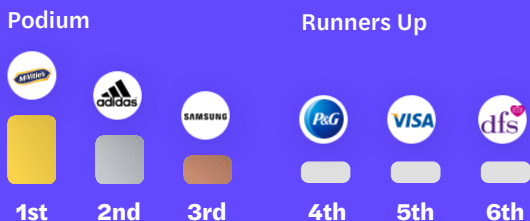
IMPACT ON BRAND FAVORABILITY



IMPACT ON PURCHASE/USAGE



IMPACT ON BRAND IMAGE



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Country Spotlight: Japan



ALDI joins major international sponsors with strong results

Major international partners dominated in Japan, with VISA, Coca-Cola, and Airbnb, joining Toyota with earning top marks. Impact was also strongest for these international partners, with the exception of NTT earning a bronze spot on impact on usage.

Sponsor Breakthrough



Impact



Impact on brand image is an average of the impact on the following questions:

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Digging Deeper: Ages, Categories, Brand Usage

Which brands over-performed amongst **millennials** on impact?

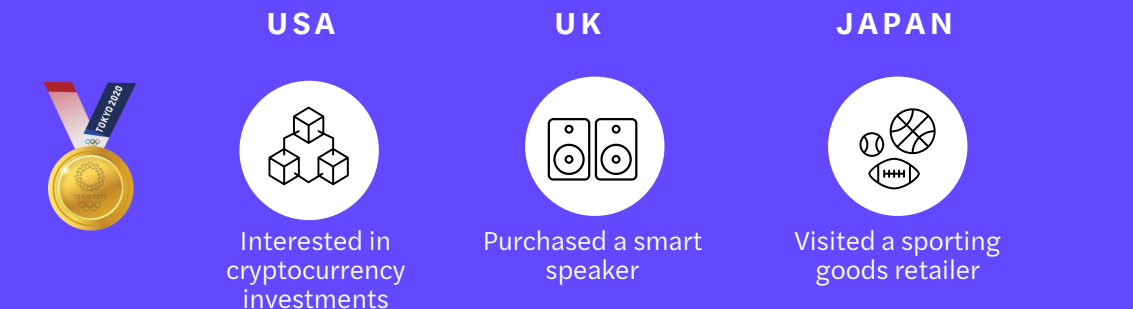
Comparing impact on favorability among millennials vs. general population.



Not all brands over-performed among millennials. In the USA, Polo Ralph Lauren, United Airlines, and Hershey's all received softer impact amongst this age group than the general population. In Japan, P&G and Coca-Cola both softened amongst millennials, despite strength in other countries.

Which **category users** most over-index with **Summer Olympics** engagement?

Across hundreds of purchase categories, which consumer segment tops the list?



Which **brands most over-index** for usage among **intensely engaged**?

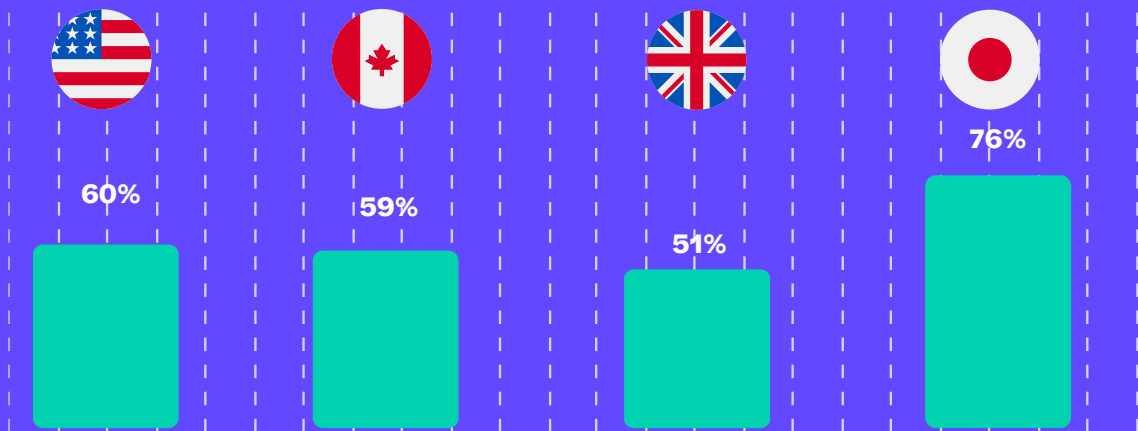


Looking Ahead to Beijing 2022

With the next Games right around the corner, are consumers ready?

2020 host country Japan leads the way with awareness of the upcoming games. In the USA, Canada, and the UK, a majority are aware of the next Games – which are less than six months away.

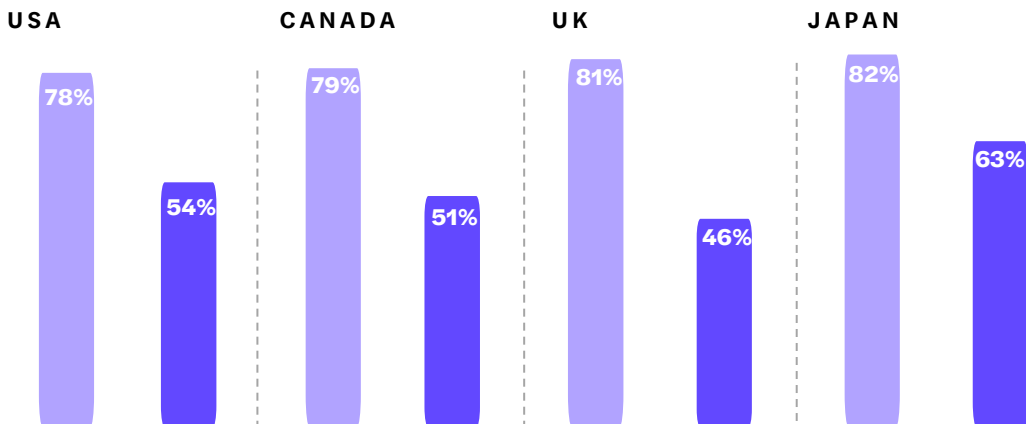
AWARENESS OF THE 2022 WINTER OLYMPICS IN BEIJING



Tokyo 2020 vs. Beijing 2022: Engagement

Post-2020, anticipated engagement with Beijing appears softer – but there’s still time for consumer interest to ramp up.

■ Tokyo 2020
■ Beijing 2022 (Anticipated)





TOKYO 2020



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19 million monthly data points. 2,000+ Properties. 18 Countries.

AUGUST 31, 2021