

INTERNATIONAL OLYMPIC COMMITTEE

London 2012 Olympic Games

FISA

January 2013



Context

- As per previous editions of the Olympic Games, the IOC has collected various data during the London 2012 Olympic Games.
- The first research presented “General public research” (slides 3 to 11) focuses on the general public’s perception of the Olympic Games in general.
- The second research presented “London 2012 key figures” (slides 12 to 62) provides detailed insights for Rowing.
- The third research presented “Spectator experience report” (slides to 63 to 75) focuses on the spectator experience at the Rowing events both before, during and after the Olympic Games.

Part 1: General public research - London 2012





General public research

General scope

1. Consumer research

Territories	UK, France, Germany, Italy, Spain, Russia, China, India, Japan, South Korea, Brazil, Canada, Mexico, USA, South Africa, Australia
Sample	36,000 respondents, covering 16 markets
Methodology	Online surveys
Age	8-65 year olds
When	Immediately Post Games

2. Broadcast measurement

Territories	220+
Channels	506
Sources	Global coverage hours and audiences via RHBs and official TV auditing systems

Service provider: Sponsorship Intelligence



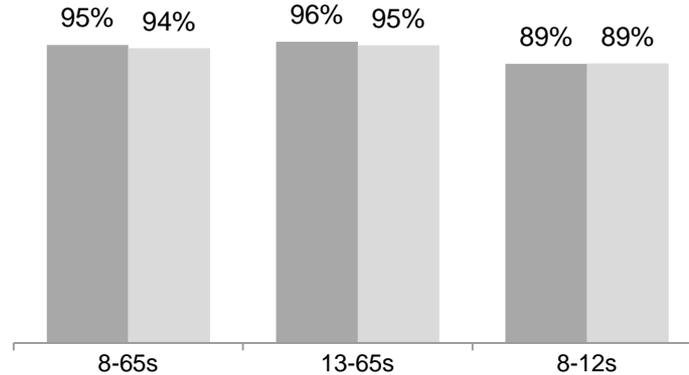
1. Consumer research

Evolution of correct identification of the Olympic Symbol between 2008 and 2012

- With 94% correctly identifying it, the Rings is still the most widely-recognised symbol

Games time research (16 territories – 750ppl/territory – age 8-65)

Correct Identification - 2008 2012



	8-65s	13-65s	8-12s
Rank 1			(92%)
Rank 2	(94%)	(94%)	



1. Consumer research

Rings performance compared to other symbols

- The Rings out-perform all other symbols for *Inspirational, Heritage & Tradition, Diversity, Optimistic, Excellence, Global, & Inclusive*



Inspirational (7.1)
Heritage & Tradition (7.9)
Diversity (7.3)
Optimistic (6.9)
Excellence (7.5)
Global (8.9)
Inclusive (6.7)

And compared to 2008, the Rings in 2012 are:

- More *Innovative* (5.0 to 5.6)
- More about *Heritage & Tradition* (7.4 to 7.9)
- But more *Commercial* (5.6 to 6.1)

Ranked according to Rings' advantage over next best



1. Consumer research

Rings performance compared to other symbols (cont'd)

- The Olympic Rings also performs well regarding *Authentic*, *Friendship*, *Respectful* & *Peace*, ranking 2nd in each case

Authentic	
	7.2
	7.1
	7.0
	6.9
	6.8
	6.6
	6.2
	5.7

Friendship	
	7.5
	7.1
	6.4
	6.4
	6.3
	5.6
	5.0
	4.8

Respectful	
	7.8
	7.1
	6.2
	6.0
	5.6
	5.1
	5.1
	4.6

Peace	
	8.0
	7.1
	6.2
	5.7
	4.6
	4.4
	4.3
	4.3



1. Consumer research

Rings performance compared to other symbols (cont'd)

Commercial	
	8.6
	8.4
	8.4
	7.8
	7.2
	6.1
	6.1
	3.9

Youthful	
	7.6
	7.3
	6.9
	6.9
	6.5
	6.2
	6.2
	4.3

Innovative	
	8.0
	6.6
	6.3
	6.0
	5.6
	5.6
	5.3
	4.7



1. Consumer research

Opinion on the Games

- Opinion on the Games has improved since 2008, most noticeably regarding their *relevance to the younger generation*

<i>Greatest positive shifts since 2008 (% agree):</i>	2008	2012
The Olympic Games is relevant to the younger generation	53%	63%
The Olympic Games is the pinnacle of all sporting events	63%	72%
The Olympic Games is as much about taking part as it is about winning	62%	71%
The Olympic Games helps me to appreciate different cultures	60%	68%
Olympic athletes inspire people to be the best they can be in their everyday life	62%	70%

<i>Among total population, youth-related statements show positive shifts since 2008 (% agree):</i>	2008	2012
The performances of Olympic athletes encourages children to participate in sport	72%	79%
Athletes at the Olympic Games provide good role models for children	70%	75%

<i>Greatest positive differences between the Total & Youth (% agree):</i>	Total	8 - 12s
There is no better achievement in sport than winning an Olympic gold medal	69%	77%
The Olympic Games are special as they happen only once in a while	76%	81%



2. Broadcast measurement

Broadcast research Key figures

- The potential audience of London 2012 television coverage was higher than the two previous Games.
- Over half of the population saw coverage.

	Beijing 2008	London 2012	Percentage of increase
RHBs	17	33	+94%
TV Channels	388	525	+35%
TV Broadcast hours	61,700	99,982	+62%
TV Potential RHB Audience	4.3bn	4.8bn	+12%
TV Actual Audience (1min)	3.5bn (77%)	3.7bn (75%)	+6%
Digital Broadcast Hours	10,000	81,541	+715%
Digital Video Views	> 670m	>1.9bn	+184%
Social Media Integration	-	Yes	-

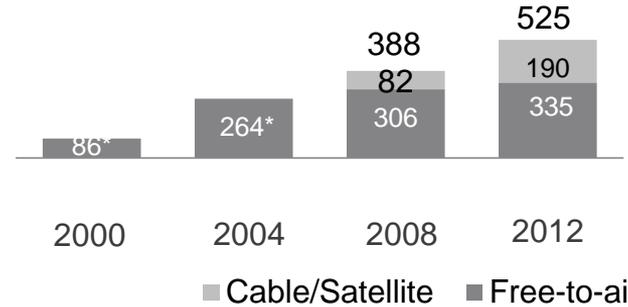


2. Broadcast measurement

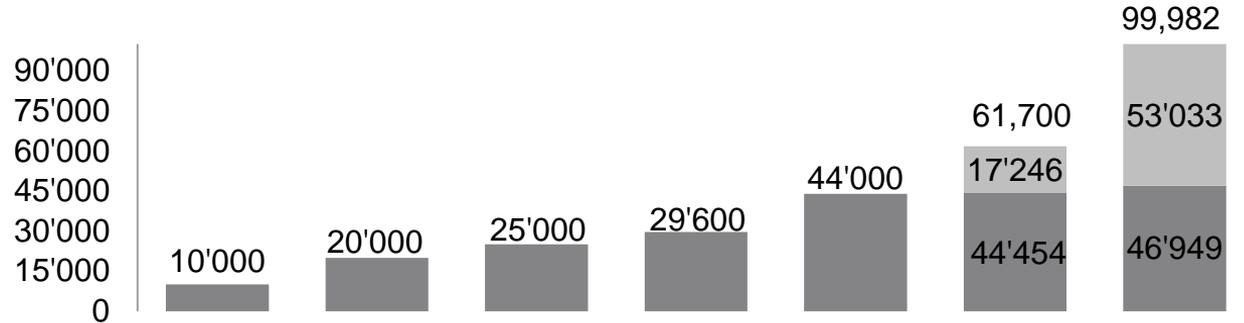
Hours of Olympic broadcast content

- Hours of Olympic broadcast content have continued to grow along with the number of channels.

TV Channels



Coverage hours



*Cable-Satellite TV breakdown of channels/hours not available before Beijing 2008

Part 2: Rowing - London 2012 key figures





Criteria and indicators

- This part uses the 'Evaluation Criteria for sports and disciplines – 2012' document that was approved by the 2011 IOC Session in Durban.
- Five criteria have been retained and are measured by 11 indicators.
- The following table outlines the criteria, their indicator(s) and the respective service providers.



Criteria and indicators (cont'd)

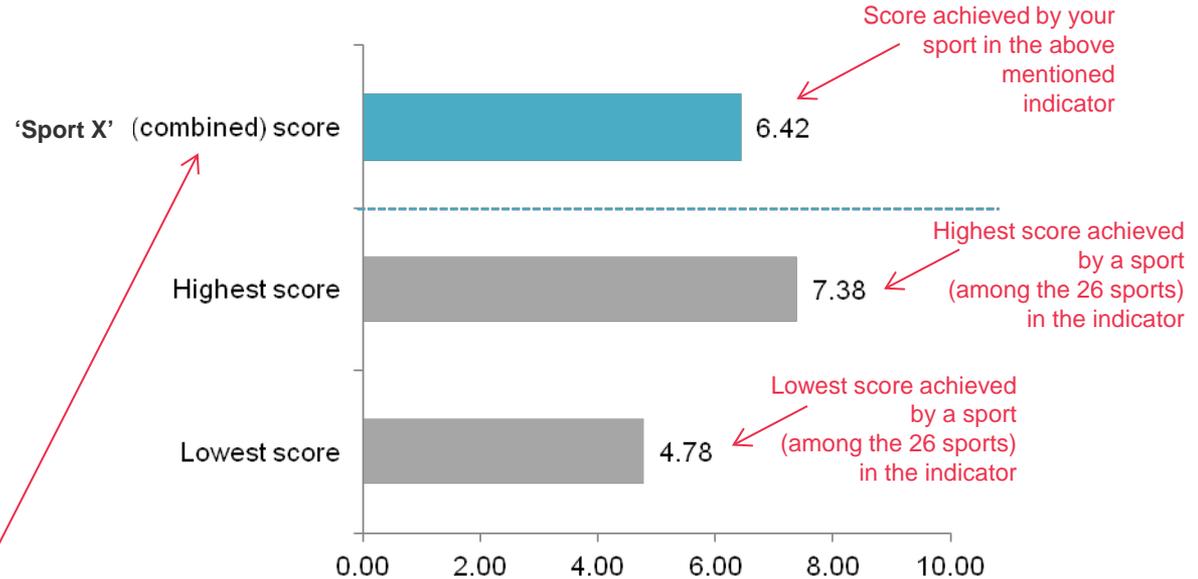
Criteria	Indicators	Service providers
1. Popularity - General public	1.1 Favourite sports among the general public	Sponsorship Intelligence
	1.2 Focus: favourite sports among the youth	Sponsorship Intelligence
2. Popularity - Spectators	2.1 Percentage of available tickets sold	LOCOG
3. Popularity - TV	3.1 Viewer hours	Sponsorship Intelligence
	3.2 Total maximum TV audience	Sponsorship Intelligence
	3.3 Average viewers per minute (AMR)	Sponsorship Intelligence
4. Popularity - Internet	4.1 Page views on most popular websites	Sponsorship Intelligence
	4.2 Page views on london2012.com	Digital Brand Services
	4.3 Video views on Youtube.com/olympics	Business & Decision
	4.4 Page views on olympic.org	Business & Decision
5. Popularity - Press	5.1 Number of press articles	TNS



Presentation of results

Fictitious example

'Sport X' appeal among general public (on a scale from 1 to 10)



If a sport includes more than one discipline and if data was available for each of them, the graph will show results for each discipline. If not, the graph will only show a "combined" result, as shown in this example.



Criteria 1: Popularity - General Public





Criteria 1: Popularity - General Public

Methodology

- Indicators:
 - 1.1 Favourite sport among the general public
 - 1.2 Focus: favourite sport among the youth (8 to 19 year olds)
- Service provider:
 - Sponsorship Intelligence



Criteria 1: Popularity - General Public

Methodology (cont'd)

- Method and scope:
 - 16 territories – all online interviews:
 - **Europe (6)**: UK, France, Germany, Italy, Spain, Russia
 - **Asia (4)**: China, India, Japan, South Korea
 - **Americas (4)**: Brazil, Canada, Mexico, USA
 - **Africa (1)**: South Africa
 - **Oceania (1)**: Australia
 - Samples:
 - 750 per territory, aged 8 to 65
 - 12,000 in total
 - Equal split by gender & across 6 age groups
 - No filters
 - Question asked:
 - *“Please state how interested you are in this sport, by using a scale from 1 to 10 where 1 means you have no interest and 10 means you are extremely interested.”*

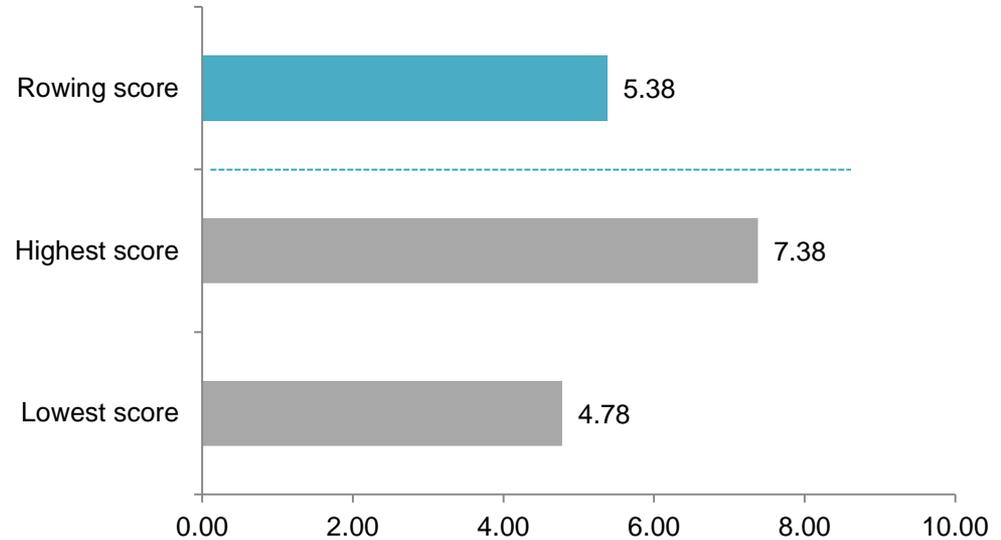


Criteria 1:

Popularity - General Public

Indicator:
**1.1 Favourite sport
among the
general public**

Rowing's appeal among the general public (on a scale from 1 to 10)



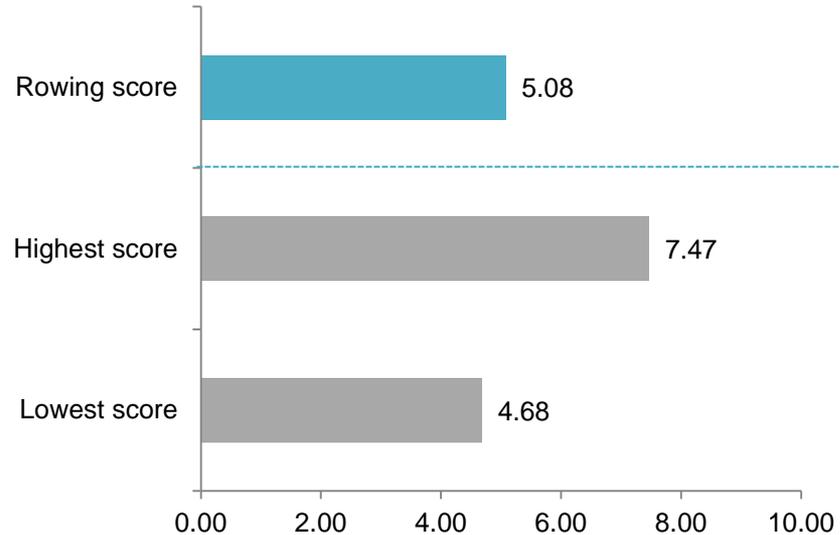


Criteria 1:

Popularity - General Public

Focus:
**1.2 Favourite sport
among the youth
(8 to 19 year olds)**

Focus: Rowing's appeal among the youth (on a scale from 1 to 10)





Criteria 2:

**Popularity –
Spectators**





Criteria 2:

Popularity – Spectators

Methodology

- Indicator:
 - 2.1 Percentage of available tickets sold
- Service provider:
 - LOCOG
- Method:
 - Ratio tickets sold / tickets available for sale

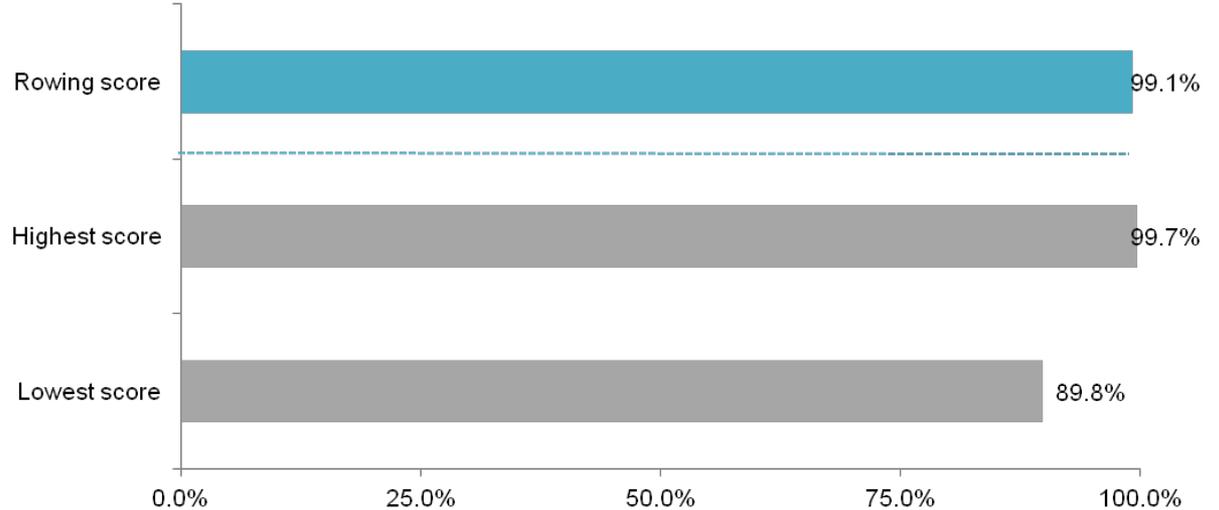


Criteria 2:

Popularity – Spectators

Indicator:
2.1 Percentage of available tickets sold

Rowing's ticket demand
(in percentage)



Discipline	Tickets available	Tickets sold	Percentage (in %)
Rowing	196,234	194,398	99.1



Criteria 3:

Popularity – TV





Criteria 3:

Popularity – TV

Methodology

- Indicators:
 - 3.1 Viewer hours
 - 3.2 Total maximum TV audience
 - 3.3 Average minute rating (AMR)
- Service provider:
 - Sponsorship Intelligence



Criteria 3:

Popularity – TV

Methodology (cont'd)

- General scope for all 3 indicators:
 - **70 territories:**
 - **Europe (36):** Armenia, Austria, Belarus, Belgium (Flemish part), Belgium (French part), Bosnia and Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Italy, Latvia, Lithuania, Macedonia, Netherlands, Norway, Poland, Portugal, Romania, Russia, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, United Kingdom, Ukraine
 - **Asia (13):** China, Chinese Taipei, Hong Kong, India, Indonesia, Israel, Japan, Kazakhstan, Malaysia, Philippines, Singapore, South Korea, Thailand
 - **Americas (14):** Argentina, Bolivia, Brazil, Canada, Chile, Colombia, Ecuador, Honduras, Mexico, Paraguay, Peru, Puerto Rico, United States, Venezuela
 - **Africa (2):** Egypt, South Africa
 - **Oceania (2):** Australia, New Zealand
 - **Pan Regional (3):**
 - Supersport, available in South Africa and all sub-Saharan African countries
 - Eurosport, available in Europe and overseas territories
 - DirecTV, available in Argentina, Chile, Colombia, Peru, Puerto Rico, Uruguay and Venezuela



Criteria 3:

Popularity – TV

Methodology (cont'd)

- Rowing's global television performance – key facts
 - Rowing coverage was aired in 47 of the 70 territories for which television audience data was broken down by sports.
 - From these territories there was a total of 552 hours of dedicated Rowing coverage.
 - 11.15% of all Rowing coverage from London 2012 was aired during primetime.
 - The total number of viewer hours for Rowing was 195,983 hours.
 - The territory to show the most Rowing coverage was Australia with 85 hours, whilst Canada showed the most FTA coverage with 26 hours.
 - The average minute of Rowing coverage (AMR 000's) was seen by 32.3 million viewers globally, with 34.47 million watching the average minute on FTA channels.
 - In the United States the AMR for Rowing coverage across all channels was 9.24 million viewers, the highest for any territory globally. China followed with the second highest AMR of 7.27 million viewers.

* FTA = Free to air



Criteria 3:

Popularity – TV

Indicator:

3.1 Viewer hours

- Specific methodology:
 - Viewer hours:

In this indicator, each TV programme is re-based to one hour:

- *Example 1:* A two-hour programme with a 4-million audience would get a Viewer hours figure of 8 million
- *Example 2:* A half-hour programme with a 4-million audience would get a Viewer hours figure of 2 million

The respective audiences for each sport (i.e. the hours viewed) are then added to produce a cumulated indicator: the Viewer hours

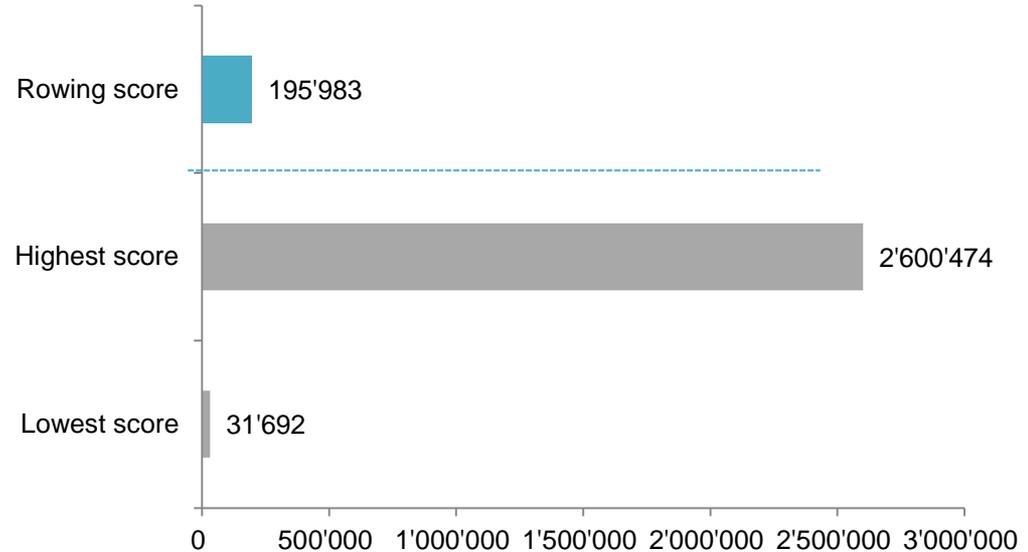


Criteria 3:

Popularity – TV

Indicator:
3.1 Viewer hours

Rowing's Viewer hours





Criteria 3:

Popularity – TV

Indicator:

3.2 Total maximum TV audience

- Specific methodology :
 - Total maximum TV audience

The highest audience generated by each sport at any given point in time in every territory are added to provide the total maximum audience per sport.

- Example:

- China: 20'000'000 (Event A)
- United States: 15'000'000 (Event B)
- Russia: 10'000'000 (Event A)
- Switzerland: 5'000'000 (Event C)

The total maximum audience would be 50'000'000.

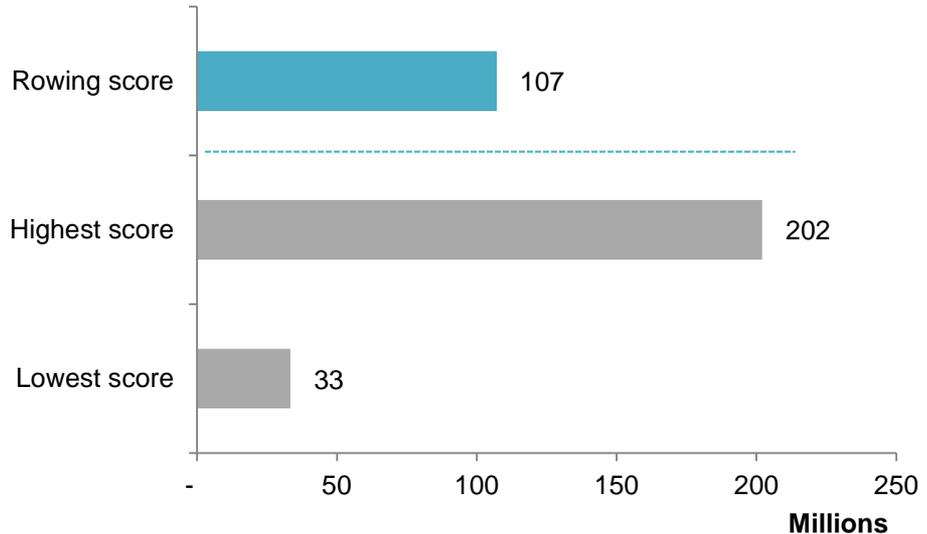


Criteria 3:

Popularity – TV

Indicator:
**3.2 Total maximum
TV audience**

Rowing's total maximum TV audience
(in millions)





Criteria 3:

Popularity – TV

Indicator: **3.3 Average Minute Rating (AMR)**

- Specific methodology:
 - Average Minute Rating (AMR):

An AMR is defined as the average number of viewers across the combined duration of a group of programmes. It is calculated according to the duration of each programme.

 - Example, take the following two programmes totalling 5 hours:
 - A one-hour programme (1/5) with an AMR of 10 million
 - A four-hour programme (4/5) with an AMR of 2 million

In that example a simple average would be 6 million. However, the majority of the coverage only achieved 2 million viewers. The weighted average gives a more realistic assessment of the situation. This means an AMR for that sport of 3.6 million [calculated as: $(1/5 \times 10 \text{ million}) + (4/5 \times 2 \text{ million})$].

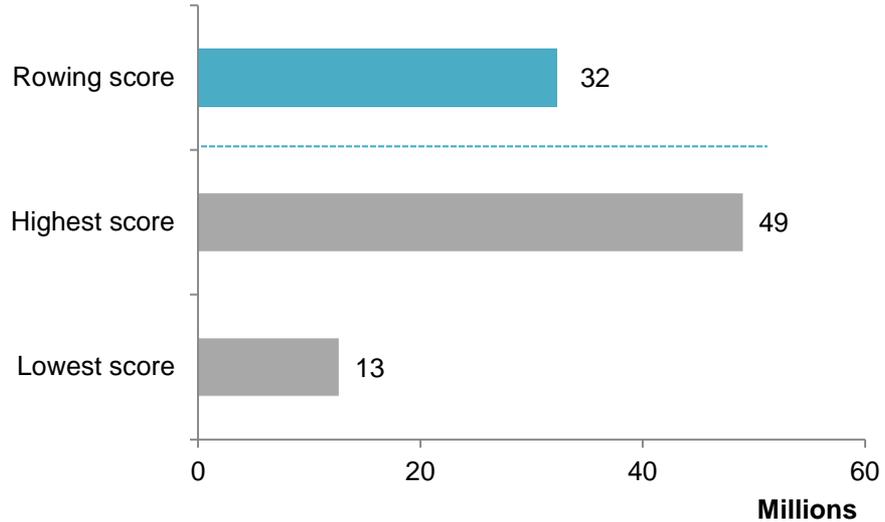


Criteria 3:

Popularity – TV

Indicator:
**3.3 Average Minute
Rating (AMR)**

**Rowing's AMR
(in millions)**





Criteria 3:

Popularity – TV

Indicator:
**3.3 Average Minute
Rating (AMR)**

Coverage and AMR (000's) by region:

Region	Platform	Total Coverage (Hrs, Mins, Secs)	Total AMR (000's)
Americas	FTA	31:02:51	9,371.10
	Other	25:00:00	98.30
Americas Total		56:02:51	9,469.40
Asia	FTA	8:28:44	9,001.57
	Other	69:32:43	1,233.62
Asia Total		78:01:27	10,235.19
Europe	FTA	173:14:04	14,111.68
	Other	103:58:32	1,242.83
Europe Total		277:12:36	15,354.51
Africa	Other	42:41:26	16.86
Africa Total		42:41:26	16.86
Oceania	FTA	21:21:18	1,990.00
	Other	76:48:00	48.47
Oceania Total		98:09:18	2,038.47
		552:07:38	



Criteria 3:

Popularity – TV

Totals

Market	Platform	Coverage (Hrs, Mins, Secs)	AMR (000's)	Market share in each country (%)	Maximum Audience (000's)	Total Viewer Hours	Prime Time	
							Coverage (Hrs, Mins, Secs)	AMR (000's)
Pan-Africa	Other	42:41:26	16.86	0.94	81.68	719.66	0:00:00	-
Bolivia	FTA	1:30:00	6.04	0.00	10.34	9.06	0:00:00	-
Brazil	Other	9:35:00	15.63	0.52	109.36	149.83	0:00:00	-
Canada	FTA	26:27:00	122.16	0.00	877.40	3,231.24	0:00:00	-
Canada	Other	13:01:00	69.97	0.00	199.60	910.78	0:00:00	-
Pan-Latin America	Other	2:24:00	12.70	1.19	12.70	30.47	0:00:00	-
United States	FTA	3:05:51	9242.89	0.00	25,488.90	28,629.86	0:06:53	23,618.69
China	FTA	6:00:30	7274.94	3.64	43,147.50	43,710.29	2:15:43	15,934.20
Chinese Taipei	Other	3:00:00	118.29	0.00	236.50	354.86	3:00:00	118.29
Hong Kong	Other	6:15:00	24.64	0.00	77.00	154.00	3:30:00	34.86
India	FTA	0:27:00	643.94	0.00	984.50	289.77	0:00:00	-
India	Other	6:01:00	601.90	0.00	2,159.02	3,621.43	0:00:00	-
Japan	Other	0:28:00	462.10	2.80	462.10	215.65	0:00:00	-
Malaysia	Other	52:50:00	2.71	0.13	10.00	143.37	1:53:00	2.00
Philippines	Other	0:58:43	23.98	1.30	23.98	23.47	0:00:00	-
Thailand	FTA	2:01:14	1082.68	10.10	2,797.00	2,187.62	1:03:48	1,159.00
Austria	FTA	2:36:56	122.00	22.14	172.00	319.10	0:00:00	-
Belgium (Flemish)	FTA	0:08:15	119.45	0.00	119.45	16.42	0:00:00	-
Belgium (French)	FTA	1:34:09	94.57	16.11	201.80	148.40	0:00:00	-
Bulgaria	FTA	3:56:00	173.57	16.38	239.00	682.70	0:22:00	186.00
Croatia	FTA	8:04:53	158.93	18.92	212.17	1,284.35	0:23:18	65.22
Cyprus	FTA	1:46:43	15.10	15.37	26.56	26.86	0:00:00	-
Czech Republic	FTA	3:12:55	262.01	23.53	628.00	842.44	0:00:00	-
Denmark	FTA	12:17:28	157.50	21.76	491.00	1,935.87	1:03:09	20.70
Estonia	FTA	9:46:36	16.36	12.78	24.00	159.93	0:00:00	-
Finland	FTA	3:30:30	172.76	43.30	224.00	606.08	0:00:00	-
France	FTA	1:44:20	3124.26	25.70	4,314.00	5,432.75	0:01:10	3,726.20



Criteria 3:

Popularity – TV

Totals (cont'd)

Market	Platform	Coverage (Hrs, Mins, Secs)	AMR (000's)	Market share in each country (%)	Maximum Audience (000's)	Total Viewer Hours	Prime Time		
							Coverage (Hrs, Mins, Secs)	AMR (000's)	
Germany	FTA	4:09:12	2524.68	28.91	3,600.00	10,485.85	0:00:00	-	
Greece	FTA	19:32:37	170.54	11.58	327.48	3,332.89	0:00:00	-	
Hungary	FTA	4:24:37	246.30	12.32	484.65	1,086.23	0:00:00	-	
Iceland	FTA	4:06:10	8.91	81.89	14.00	36.57	0:00:00	-	
Italy	Other	47:59:51	19.78	0.23	106.52	949.32	2:22:28	5.64	
Latvia	FTA	4:11:00	30.08	11.06	58.00	125.82	0:00:00	-	
Lithuania	FTA	24:37:47	20.22	5.87	62.40	498.04	0:00:00	-	
Netherlands	FTA	3:53:00	862.62	53.98	1,923.00	3,349.85	0:08:00	1,673.50	
Norway	FTA	2:28:54	146.65	40.80	346.00	363.94	0:00:00	-	
Pan-Europe	Other	8:33:12	1013.40	1.53	1,459.00	8,667.94	0:00:00	-	
Poland	FTA	4:15:00	1005.56	19.36	1,609.07	4,273.65	0:00:00	-	
Poland	Other	0:57:00	84.51	1.31	155.68	80.29	0:07:00	54.77	
Portugal	FTA	4:37:29	131.92	8.69	225.70	610.09	0:25:47	225.70	
Russia	Other	17:30:00	10.20	0.00	10.20	178.50	2:45:00	10.20	
Serbia	FTA	11:44:25	149.16	12.84	389.00	1,751.14	0:00:00	-	
Slovakia	FTA	2:00:17	38.13	9.50	71.00	76.44	0:00:00	-	
Slovenia	FTA	5:22:00	74.89	33.48	127.13	401.88	0:00:00	-	
Spain	FTA	0:31:09	918.20	8.41	974.37	476.70	0:00:00	-	
Sweden	FTA	2:19:00	139.96	17.02	575.00	324.25	0:00:00	-	
Switzerland	FTA	14:33:43	46.67	20.71	226.50	679.67	0:22:22	101.41	
UK	FTA	11:48:59	3180.67	0.00	8,308.00	37,584.06	0:21:38	5,658.91	
UK	Other	28:58:29	114.94	1.34	187.00	3,330.44	0:00:00	-	
Australia	FTA	8:17:18	1724.77	38.76	3,387.43	14,295.51	4:29:07	2,609.61	
Australia	Other	76:48:00	48.47	0.00	186.90	3,722.35	29:47:00	98.75	
New Zealand	FTA	13:04:00	265.22	24.34	521.50	3,465.58	7:08:00	301.85	
						552:07:38	195,983.22	61:35:23	



Criteria 4:

**Popularity –
Internet**





Criteria 4:

Popularity – Internet

Methodology

- Indicators:
 - 4.1 Page views on most popular websites
 - 4.2 Page views on london2012.com
 - 4.3 Video views on youtube.com/olympics
 - 4.4 Page views on olympic.org
- Service providers:
 - Sponsorship intelligence (indicator 4.1)
 - Digital Brand Services (indicator 4.2)
 - Business & Decision (indicators 4.3 and 4.4)



Criteria 4:

Popularity – Internet

Indicator:

4.1 Page views on most popular websites

- Scope:
 - Page views on most popular websites:
15 territories:
 - **Europe (6):** United Kingdom, France, Germany, Italy, Spain, Russia
 - **Asia (5):** China, India, Indonesia, Japan, South Korea
 - **Americas (3):** Brazil, Canada, USA
 - **Africa (0):** - *
 - **Oceania (1):** Australia

*Information not available



Criteria 4:

Popularity – Internet

Indicator:

4.1 Page views on most popular websites

- Methodology:
 - Page views on most popular websites:

The top ten websites per country that generate the highest traffic related to an Olympic content have been identified:
 - **Australia:** ninemsn Sports, Yahoo! Sports, ESPN, LONDON2012.COM, FOXSports.com on MSN, BBC Sport, USA Today Sports Media Group, Guardian Sport, BLEACHERREPORT.COM, FOXSPORTS.COM.AU
 - **Brazil:** Globo Esportes, UOL Esporte, Terra Sports, MSN Sports International, Yahoo! Sports, Estadao - Esportes Sites, LANCENET.COM.BR, Jornal Extra – Esportes, R7 Esportes, iG Esporte
 - **Canada:** Yahoo! Sports, CTVOLYMPICS.CA, FOXSports.com on MSN, TSN/RDS, LONDON2012.COM, ESPN, USA Today Sports Media Group, MSN Sports International, NBC Sports, Globe And Mail - Sports



Criteria 4:

Popularity – Internet

Indicator:

4.1 Page views on most popular websites

- Methodology:
 - Page views on most popular websites (cont'd):
 - **China:** QQ.COM Sports, SINA Sports, SOHU.COM Sports, 163.COM Sports, Yahoo! Sports, 500WAN.COM, ZHIBO8.CC, Xinhuanet Sports, TITAN24.COM, HUPU.COM
 - **France:** L'Equipe, Yahoo! Sports, Eurosport, Orange Sport, LONDON2012.COM, SPORT24.COM, SPORTS.FR, MSN Sports International, RMC.FR Sports, Le Figaro Sports
 - **Germany:** Sport1 online, Yahoo! Sports, SPIEGEL.DE Sport, SPORTSCHAU.DE, Sportal, Focus Online – Sport, MSN Sports International, LONDON2012.COM, FOXSports.com on MSN, ZDFSPORT.DE
 - **India:** ESPN, Yahoo! Sports, LONDON2012.COM, Sify Sports, MSN Sports International, NDTV Sports, FOXSports.com on MSN, BLEACHERREPORT.COM, BBC Sport, Guardian Sport



Criteria 4:

Popularity – Internet

Indicator:

4.1 Page views on most popular websites

- Methodology:
 - Page views on most popular websites (cont'd):
 - **Indonesia:** Yahoo! Sports, Detik Sport, Perform Sports, LIVESCORE.COM, VIVAbola, SPORTKU.COM, LONDON2012.COM, BOLANEWS.COM, FOXSports.com on MSN, MSN Sports International
 - **Italy:** Yahoo! Sports, GAZZETTA.IT, Mediaset – Sport, Gruppo SportNetwork, DIRETTA.IT, Libero.it Sports, TUTTOSPORT.COM, Repubblica.it Sport, Virgilio Sport, SPORTLIVE.IT
 - **Japan:** Yahoo! Sports, SPONICHI.CO.JP, NIKKANSPORTS.COM, SANSPO.COM, DAILY.CO.JP, JOC.OR.JP, iza News-Sports, SPORTSNAVI.COM, JSports.CO.JP, GORIN.JP
 - **Korea:** JoinsMSN Sports, Naver.com News – Sports, Daum.net Sports, SPORTSSEOUL.COM, Yahoo! Sports, SPORTALKOREA.COM, Nate.com News – Sports, Goal Sites, LONDON2012.COM, ESPN



Criteria 4:

Popularity – Internet

Indicator:

4.1 Page views on most popular websites

- Methodology:
 - Page views on most popular websites (cont'd):
 - **Russia:** SPORTBOX.RU, CHAMPIONAT.COM, RBC Sport, SPORT-EXPRESS.RU, SOVSPORT.RU, RSPORT.RU, Gazeta Sport, Eurosport, Rambler Sport, SPORT.RU
 - **Spain:** Marca Sites, AS.com Sites, Yahoo! Sports, Sport.es Sites, MUNDODEPORTIVO.COM Sites, ESPN, BBC Sport, LONDON2012.COM, Perform Sports, ESTADIODEPORTIVO.COM
 - **UK:** BBC Sport, Yahoo! Sports, LONDON2012.COM, Sky Sports, Guardian Sport, Mail Online – Sport, Sporting News On AOL, Telegraph Sport, MSN Sports International, ESPN
 - **USA:** Yahoo! Sports, FOXSports.com on MSN, ESPN, NBC Sports, USA Today Sports Media Group, CBS Sports, BLEACHERREPORT.COM, Sporting News On AOL, Turner Sports Digital, Sports Illustrated Sites

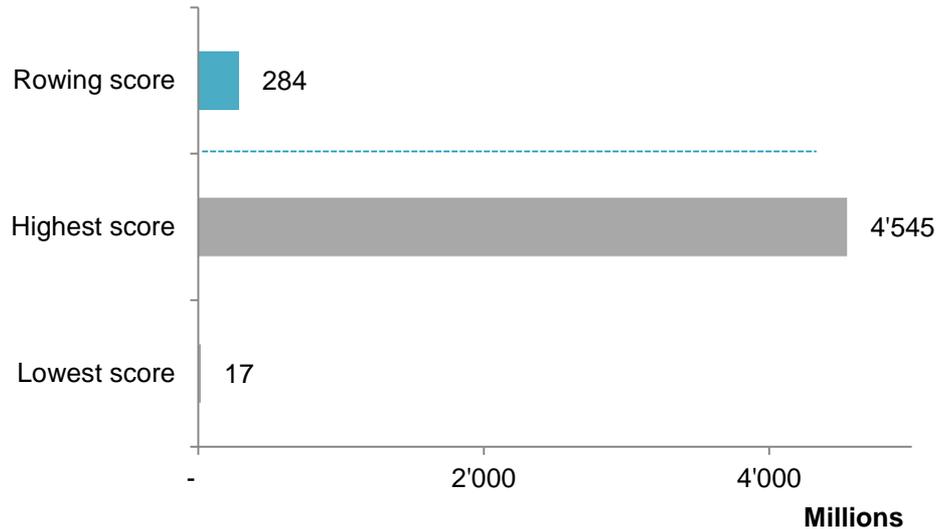


Criteria 4:

Popularity – Internet

Indicator:
**4.1 Page views on
most popular
websites**

Rowing's page views on most popular website
(in millions)





Criteria 4:

Popularity – Internet

Indicator:

***4.2 Page views on
london2012.com***

- Scope:
 - Page views on london2012.com:
The analysis was conducted worldwide.



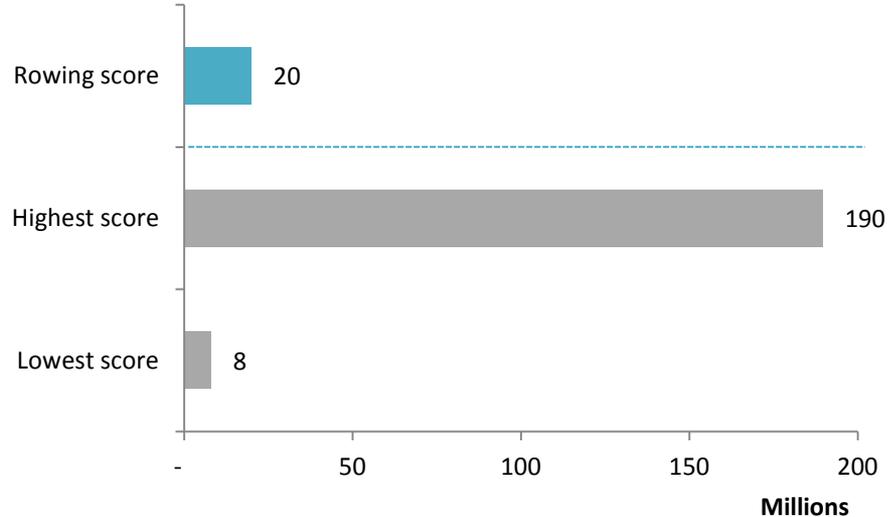
Criteria 4:

Popularity – Internet

Indicator:
**4.2 Page views on
london2012.com**

Rowing's page views on london2012.com
(in million)

('Games Time' from 27/07/12 to 12/08/12)





Criteria 4:

Popularity – Internet

Indicator:

4.3 Video views on youtube.com/olympics

- Scope:
 - Page views on youtube.com/olympics:

The London 2012 Olympic Games were broadcasted live and on-demand on Youtube in 64 territories (unsold territories in Asia / Sub-Saharan Africa for Internet and Mobile platforms). Video views were measured in these territories using Youtube analytics.



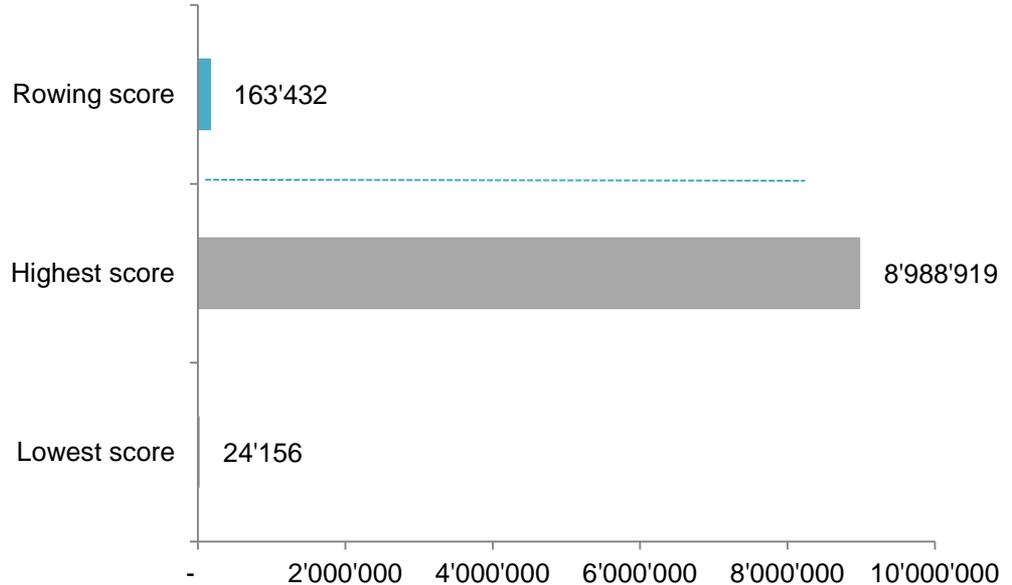
Criteria 4:

Popularity – Internet

Indicator:
**4.3 Video views on
youtube.com/olympics**

'Games Time' Rowing's page views on youtube.com/olympics

(from 27/07/12 to 12/08/12)





Criteria 4:

Popularity – Internet

Indicator:

4.4 Page views on olympic.org

- Scope:
 - Page views on olympic.org:
The analysis was conducted worldwide.

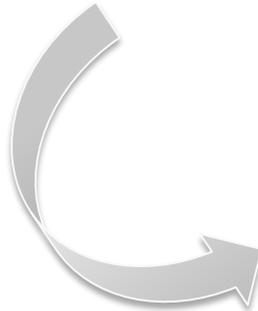
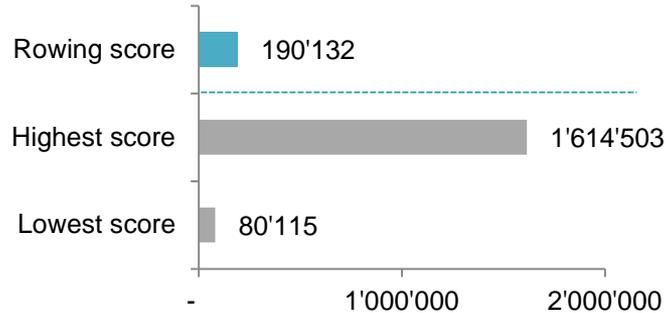


Criteria 4:

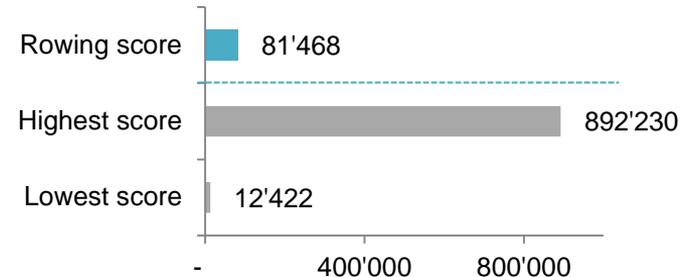
Popularity – Internet

Indicator:
**4.4 Page views on
olympic.org**

**'Year 2012' Rowing's page views on olympic.org:
(from 01/01/12 to 25/10/12)**



**'Games Time' Rowing's page views on olympic.org:
(from 27/07/12 to 12/08/12)**





Criteria 5:

**Popularity –
Press**





Criteria 5:

Popularity – Press

Methodology

- Indicator:
 - 5.1 Number of press articles
- Service provider:
 - TNS



Criteria 5:

Popularity – Press

Indicator:

5.1 Number of press articles

- Specific methodology and scope:

- Number of press articles:

This indicator looks at the total number of press articles published on each sport. The analysis was conducted in the following 49 territories:

- **Europe (21):** Austria, Belgium, Croatia, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Italy, the Netherlands, Norway, Poland, Portugal, Romania, Russia, Spain, Sweden, Ukraine and the UK
- **Asia (14):** China, Chinese Taipei, Hong Kong, India, Indonesia, Japan, Malaysia, Pakistan, the Philippines, Singapore, South Korea, Thailand, Turkey and Vietnam
- **Americas (7):** Argentina, Brazil, Canada, Chile, Guatemala, Mexico and USA
- **Africa (5):** Egypt, Kenya, Morocco, Nigeria and South Africa
- **Oceania (2):** Australia and New Zealand

Five leading print publications per country have been identified (five daily newspapers, one being a sport publication if available.)



Criteria 5:

Popularity – Press

Indicator:
**5.1 Number of press
articles**

List of publications: Europe

Country	Publications				
Austria	Die Presse	Kleine Zeitung	Kronen Zeitung	Kurier	Österreich
Belgium	De Standaard	Het Laatste Nieuws	Het Nieuwsblad	La Dernière Heure / Les Sports	Le Soir
Croatia	24 Sata	Jutarnji List	Slobodna Dalmacija	Sportske Novosti	Vecernji List
Czech Republic	Blesk	Lidové Noviny	Mlada fronta DNES	Pravo	Sport
Denmark	Berlingske Tidende	Ekstra Bladet	Børsen	Morgenavisen Jyllands-Posten	Politiken
Finland	Aamulehti	Helsingin Sanomat	Ilta Sanomat	Iltalehti	Turun Sanomat
France	Aujourd'hui en France	L'Équipe	Le Figaro	Le Monde	Libération
Germany	Bild / Bild am Sonntag	Die Welt / Welt am Sonntag	Frankfurter Allgemeine Zeitung / Frankfurter Allgemeine Sonntagszeitung	Süddeutsche Zeitung	Westdeutsche Allgemeine Zeitung
Greece	Eleftheros Typos	Ethnos	Kathimerini	Sport Day	Ta Nea
Hungary	Blikk / Vasárnapi Blikk	Magyar Nemzet / Képeslap	Nemzeti Sport	Népszabadság	Vas Népe
Italy	Corriere della Sera	Il Sore 24 Ore	La Gazzetta dello Sport	La Repubblica	La Stampa
Netherlands	Algemeen Dagblad	Dagblad de Limburger	De Telegraaf	De Volkskrant	NRC Handelsblad
Norway	Aftenposten Morgen	Bergens Tidende	Dagbladet	Dagens Næringsliv	Verdens Gang
Poland	Fakt Gazeta Codzienna	Gazeta Wyborcza	Przegląd Sportowy	Rzeczpospolita	Super Express



Criteria 5:

Popularity – Press

Indicator:
**Number of press
articles**

List of publications: Europe (cont'd)

Country	Publications				
Portugal	Correio da Manhã	Diário de Notícias	Jornal de Notícias	Público	Record
Romania	Adevarul	Cancan	Click!	Gazeta Sporturilor	Libertatea
Russia	Komsomolskaya Pravda	Moskovsky Komsomolets	Rossijskaya Gazeta	Sovetsky Sport	Vechernyaya Moskva
Spain	ABC	El Mundo	El País	La Vanguardia	Marca
Sweden	Aftonbladet	Dagens Nyheter	Expressen	Goteborgs Posten	Svenska Dagbladet
Ukraine	DEN	Ekspress	Gazeta po Ukrainski	Komanda	Komsomolskaya Pravda v Ukraine
United Kingdom	Daily Mail / The Mail on Sunday	The Daily Telegraph / The Sunday Telegraph	The Guardian / The Observer	The Sun / The Sun Sunday	The Times / The Sunday Times



Criteria 5:

Popularity – Press

Indicator:
**5.1 Number of press
articles**

List of publications: Asia

Country	Publications				
China	Guangzhou Daily	Information Times	People's Daily	Qilu Evening News	Yangtze Evening Post
Chinese Taipei	Apple Daily	China Times	Economic Daily News	The Liberty Times	United Daily News
Hong Kong	Apple Daily	Oriental Daily News	Sing Tao Daily	South China Morning Post	The Sun
India	Amar Ujala	Dainik Bhaskar	Dainik Jagran	The Hindu	The Times of India
Indonesia	Jawa Pos	Kompas	Media Indonesia	Pos Kota	Rakyat Merdeka
Japan	Mainichi Shimbun	Nihon Keizai Shimbun	The Asahi Shimbun	Tokyo Sports	Yomiuri Shimbun
Malaysia	China Press	Harian Metro	Sin Chew Daily	The Star (Malay)	Utusan Malaysia
Pakistan	Daily Express	Dawn	Jang	Nawa-I-Waqt	The News
Philippines	Abante	Abante Tonight	Bulgar	Filipino Star Ngayon	Remate
Singapore	Lianhe Wanbao	Lianhe Zaobao	Shin Min Daily News	Straits Times	The New Paper
South Korea	The Chosun Ilbo	The Dong-a Ilbo	The Hankyoreh	The JoongAng Ilbo	The Sports Chosun
Thailand	Daily News	Khao Sod	Kom Chad Luek	Matichon Daily	Thai Rath
Turkey	Fanatik	Feza Zaman	Hurriyet	Posta	Sabah
Vietnam	Cong An Thanh Pho Ho Chi	Nguoi Lao Dong	Thanh Nien	Thao Ngay Nay	Tuoi Tre



Criteria 5:

Popularity – Press

Indicator:
**5.1 Number of press
articles**

List of publications: Americas

Country	Publications				
Argentina	Clarín	Diario Popular	La Nación	Olé	Página/12
Brazil	Folha de S. Paulo	Extra	Lance!	O Estado de S. Paulo	O Globo
Canada	The Globe and Mail	La Presse	National Post	Toronto Star	The Vancouver Sun
Chile	El Mercurio	La Segunda	La Nación	La Tercera	Las Últimas Noticias
Guatemala	Diario de Centro América	La Hora	Nuestro Diario	Prensa Libre	Siglo 21
Mexico	El Gráfico	El Universal	Esto	La Prensa	Reforma
United States	Los Angeles Times	The New York Times	USA Today	The Wall Street Journal	The Washington Post



Criteria 5:

Popularity – Press

Indicator:
**5.1 Number of press
articles**

List of publications: Africa

Country	Publications				
Egypt	Al Ahram	Al-Akhbar	Al-Gomhuria	Al-Masry Al-Youm	Al-Shorouk
Kenya	Business Daily	The Star	Daily Nation	The People	The Standard
Morocco	Al-Massae	Assabah	L'Économiste	L'Opinion	Le Matin du Sahara et du Maghreb
Nigeria	New Nigerian	The Guardian	The Punch	The Daily Sun	This Day
South Africa	Daily Sun	Sowetan	The Citizen	The Star	The Times / Sunday Times



Criteria 5:

Popularity – Press

Indicator:
**5.1 Number of press
articles**

List of publications: Oceania

Country	Publications				
Australia	The Courier Mail / The Sunday Mail	The Daily Telegraph / The Sunday Telegraph	Herald Sun / Sunday Herald Sun	The Age / The Sunday Age	The Sydney Morning Herald / Sun Herald
New Zealand	The Dominion Post	The New Zealand Herald	Otago Daily Times	The Press	Waikato Times

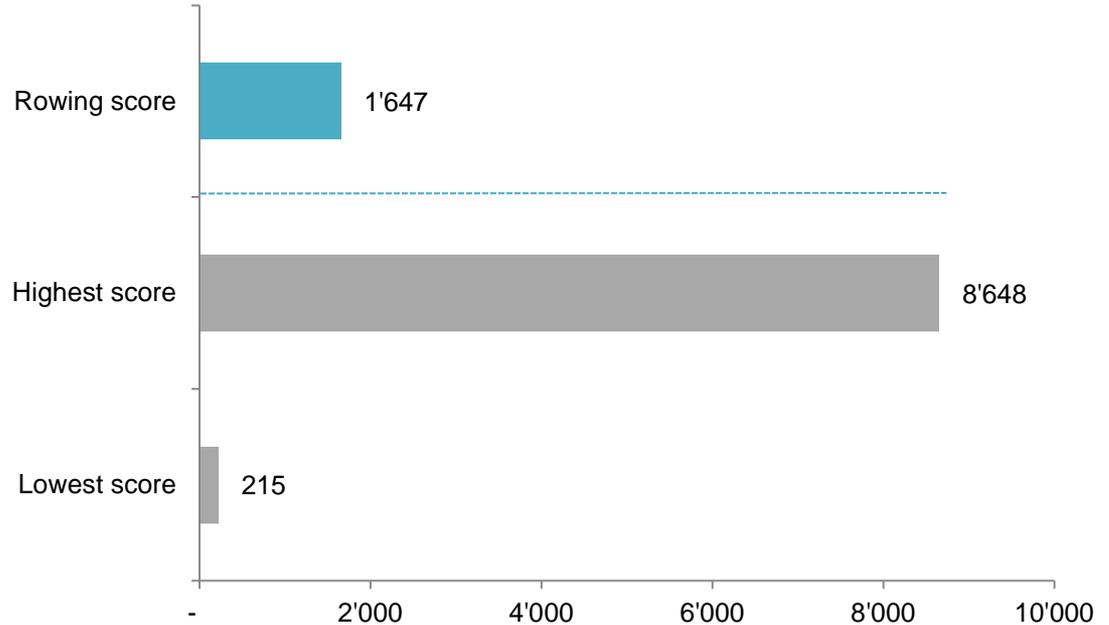


Criteria 5:

Popularity – Press

Indicator:
**5.1 Number of press
articles**

Rowing's number of press articles



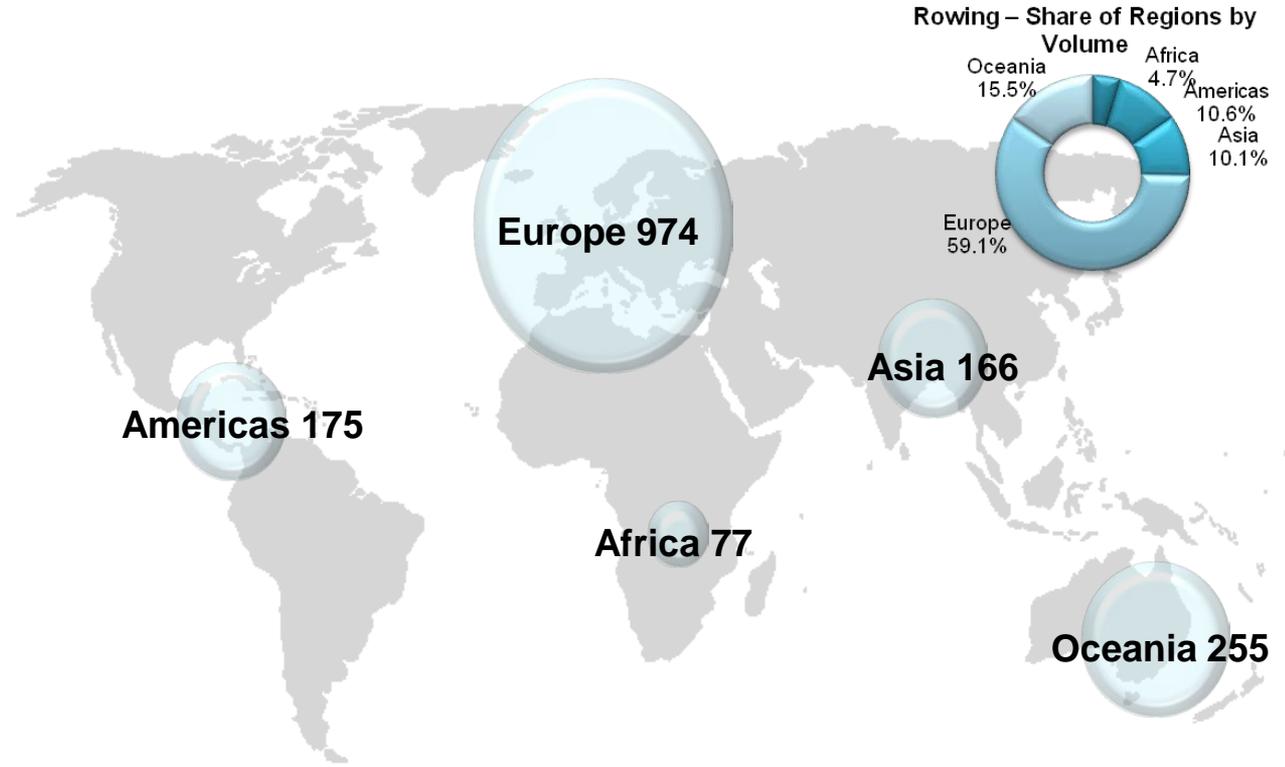


Criteria 5:

Popularity – Press

Indicator:
**5.1 Number of press
articles (per
continent)**

Rowing's number of press articles (per continent)





Criteria 5:

Popularity – Press

Indicator:

5.1 Number of press articles (per country)

Rowing's number of press articles (per country)

Country	Volume
United Kingdom	285
New Zealand	187
Croatia	111
Greece	74
Australia	68
Germany	68
Canada	66
Poland	55
South Africa	54
United States	51
France	49
Netherlands	47
Denmark	42
Czech Republic	37
Belgium	33
India	33
Portugal	29
Hungary	28
Thailand	26
Argentina	25
Pakistan	25
Japan	21
Romania	21
Italy	19

Country	Volume
Mexico	18
Austria	17
China	16
Norway	15
Sweden	14
Finland	11
Egypt	9
Malaysia	9
Brazil	8
Hong Kong	8
Spain	8
Vietnam	8
Nigeria	7
Russia	7
Chile	6
Kenya	6
South Korea	6
Turkey	5
Chinese Taipei	4
Ukraine	4
Indonesia	2
Singapore	2
Guatemala	1
Morocco	1
Philippines	1

Part 3: Spectator experience report - London 2012



Methodology

	Pre	During	Post
Survey type	Online quantitative survey via email		
The respondent	Purchaser of London 2012 Olympic Games tickets		
Interview length (minutes)	18	15	22
Fieldwork period	14 – 23 April	25 July – 16 August	21 August – 4 September
Number of completed Rowing attendee interviews	991	3,655	1,783
Mail out process	Emailed over 2 days	Emailed daily (x3) during the Olympic Games	Emailed over 2 days

Service provider: Nielsen

Rowing Specific Key Performance Scores

	Rowing			All Sports / Ceremonies		
	Pre	During	Post	Pre	During	Post
Excitement – Pre-wave expectations	%	%	%	%	%	%
• Extremely excited (8-10 out of 10)	69	-	-	69	-	-
• Not at all excited (1-3 out of 10)	5	-	-	5	-	-
• Mean score out of 10	8.0	-	-	8.0	-	-
Enjoyment – During/Post-wave experience						
• Enjoyed very much (8-10 out of 10)	-	93	96	-	88	88
• Not enjoyed at all (1-3 out of 10)	-	1	0	-	1	1
• Mean score out of 10	-	9.3	9.5	-	9.0	9.1
<i>Base size:</i>	991	3,655	1,783	23,870	95,924	47,770

Spectator Profile – Post-wave data

Ticket Purchaser

	Rowing	All Sports / Ceremonies
GENDER	%	%
• Male	56	61
• Female	44	39
AGE		
• 16-34 years old	24	32
• 35-54 years old	53	53
• 55+ years old	23	15
• Average age	45 years old	42 years old
REGION		
• Living in London	22	36
• Living in the rest of UK	78	64
ETHNICITY		
• White	93	87
• Black and minority ethnic	4	11
DISABILITY		
• Disabled / Long-term health condition	9	8
• Not disabled	91	91
HOUSEHOLD INCOME		
• Less than £22k per annum	5	7
• £22k – £37k per annum	11	15
• More than £37k per annum	68	62
JOIN IN APP		
• Downloaded	36	38
• Not downloaded	62	60

Base size:

1,783

47,770

Spectator Group / Party

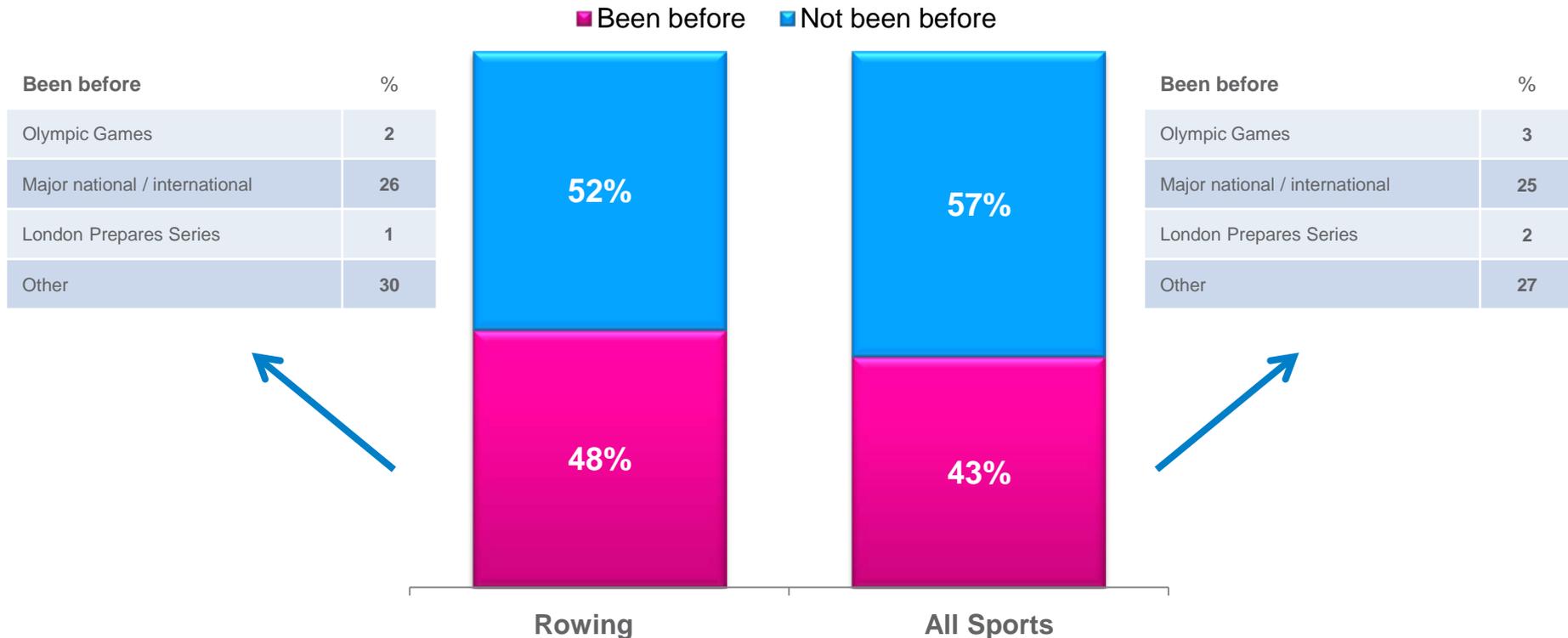
	Rowing	All Sports / Ceremonies
WHO IS IN THE GROUP?	%	%
• Going on their own	4	9
• Going with family	85	76
• Going with friends	20	21
CHILDREN IN GROUP?		
• Group with adults only	77	74
• Group with children under 16	23	26
Group with children under 5	8	4
Group with children 5-16	18	23
• Average size of group	3.0 People	2.8 People
DISABILITY		
• At least one disabled person in group	15	14
• No disabled people in group	84	85
AVERAGE AGE OF SPECTATORS	39 years old	36 years old
Base size:	1,783	47,770
GAMES MOBILITY SERVICE (During data)		
• Used	5	3
• Not used	94	97
Base size:	3,655	95,924

■ At least 4% higher than 'All Sports / Ceremonies'

■ At least 4% lower than 'All Sports / Ceremonies'

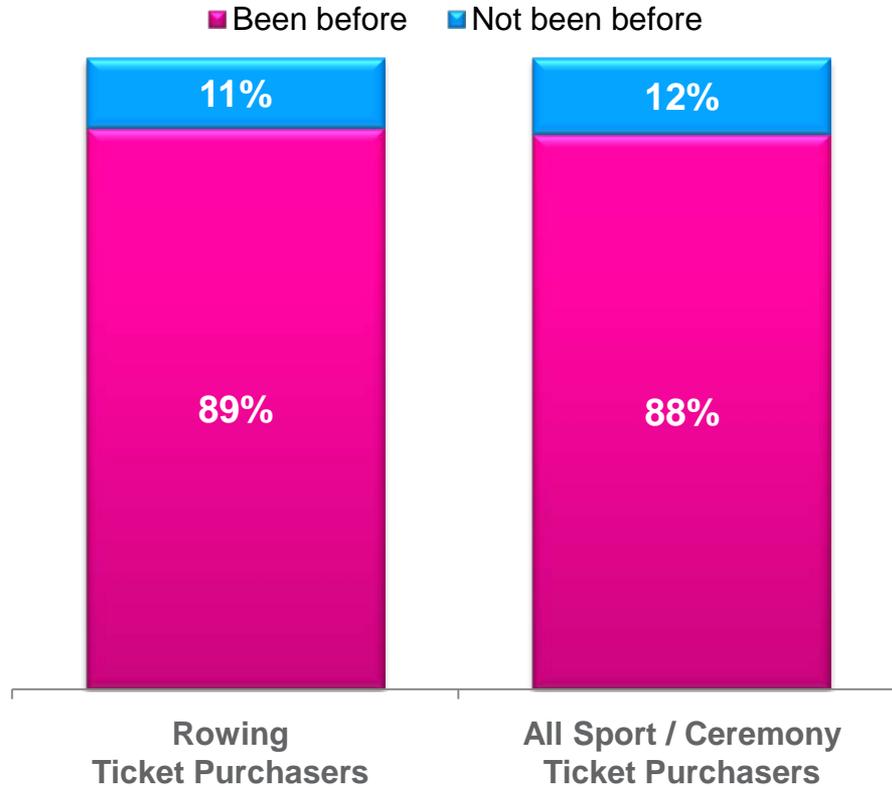
Been to a live Rowing event before? – Post-wave data

Q27. Have you ever been to a live Rowing event before?



Been to other major live events before? – Post-wave data

Q43. Have you ever attended any other major live events before?



Rowing expectations / experience rankings – Pre/During/Post-waves data

Q11. Overall, how excited are you about attending the London 2012 Olympic Games? *Scale 1-10. Mean shown*

Q39. Still thinking about Rowing, overall how much did you enjoy your attendance? *Scale 1-10. Mean shown*



	<u>Pre</u>	<u>During</u>	<u>Post</u>
Excitement – Pre-wave expectations	%	%	%
• Extremely excited (8-10 out of 10)	69	-	-
• Average excitement (4-7 out of 10)	25	-	-
• Not at all excited (1-3 out of 10)	5	-	-
Enjoyment – During/Post-wave experience			
• Enjoyed very much (8-10 out of 10)	-	93	96
• Average enjoyment (4-7 out of 10)	-	6	4
• Not enjoyed at all (1-3 out of 10)	-	1	0

Base size:

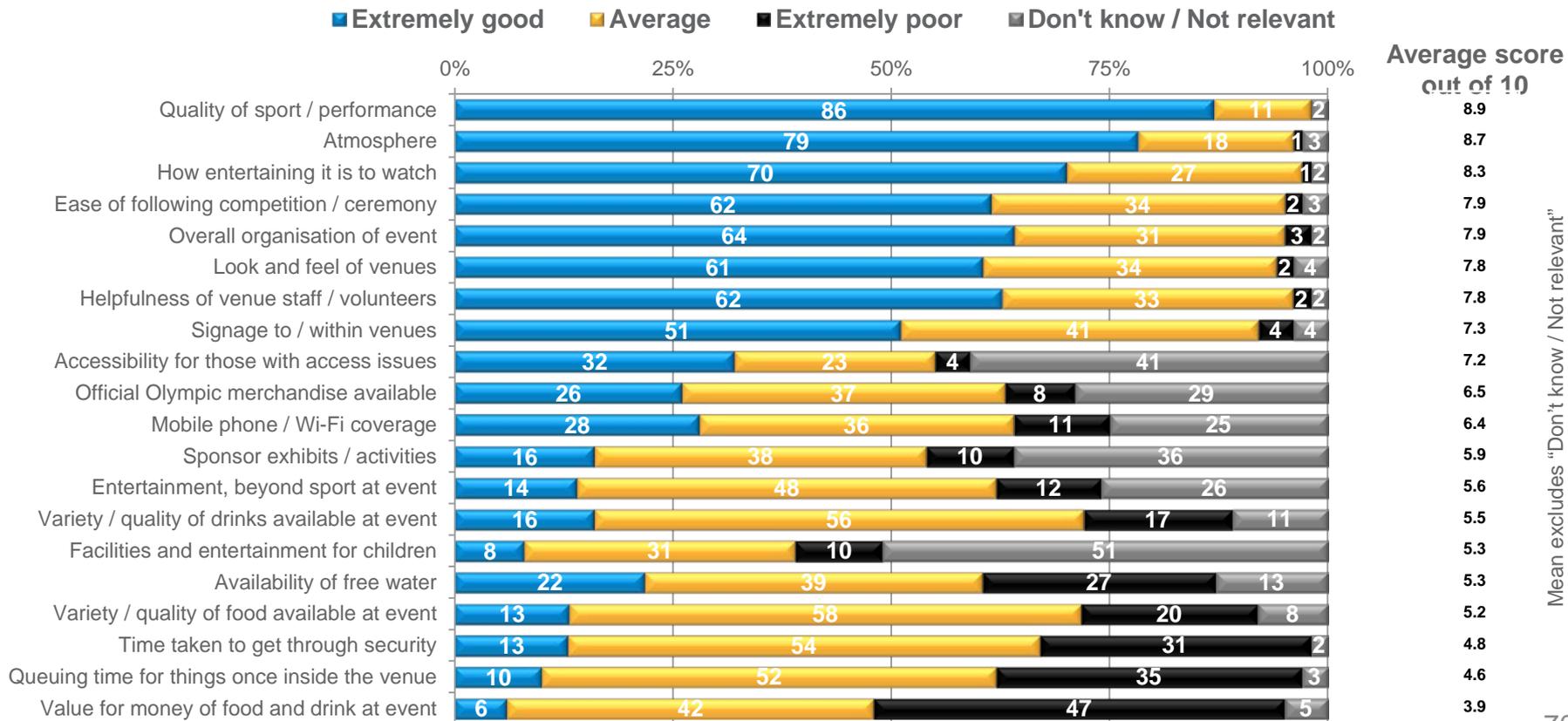
991

3,655

1,783

Expectations of Rowing – Pre-wave data

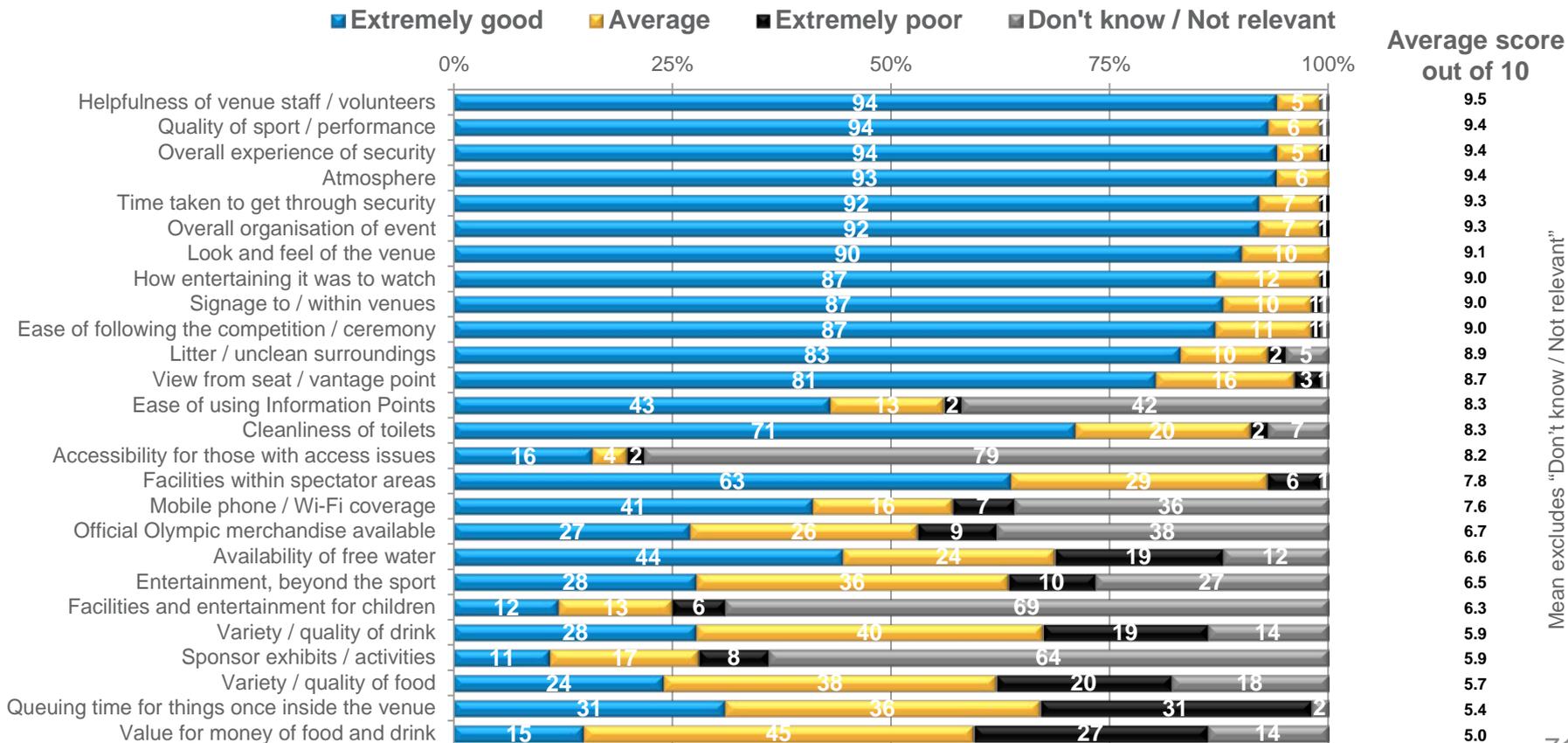
Q25. Regarding Rowing at Eton Dorney that you plan to attend at the London 2012 Olympic Games, how good do you realistically expect each of the following aspects to be? **Scale 1-10. Extremely good = 8-10; Average = 4-7; Extremely poor = 1-3**



Based on all spectators who attended the sport / ceremony for which they purchased a ticket

Aspect ratings of Rowing – During-wave data

Q25/Q26. Using a scale of 1 to 10 where 1 means "Extremely poor" and 10 means "Extremely good", please rate the following aspects of your attendance at Rowing at Eton Dorney. **Scale 1-10. Extremely good = 8-10; Average = 4-7; Extremely poor = 1-3**

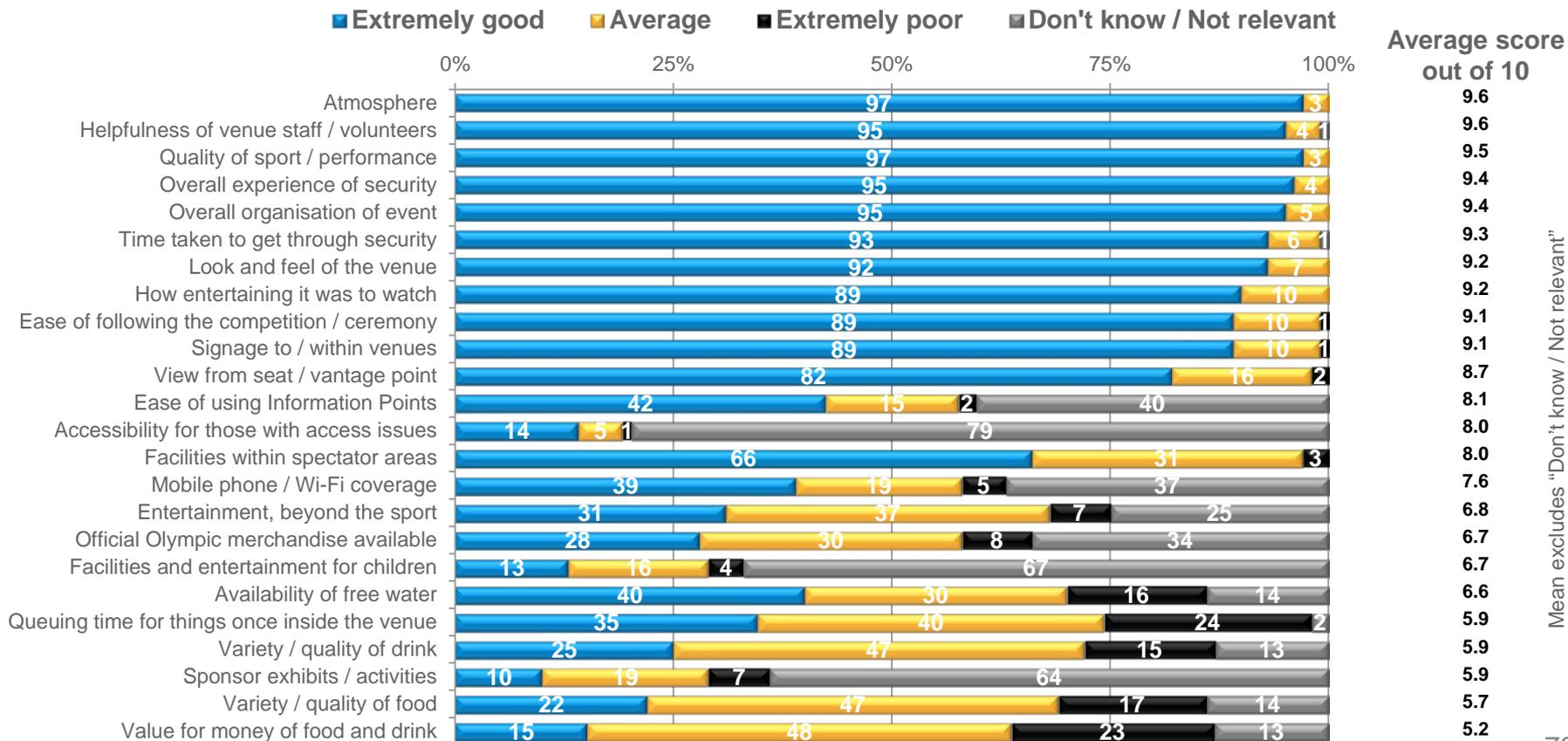


Mean excludes "Don't know / Not relevant"

Based on all spectators who attended the sport / ceremony for which they purchased a ticket

Aspect ratings of Rowing – Post-wave data

Q34/Q37. Using a scale of 1 to 10 where 1 means "Extremely poor" and 10 means "Extremely good", please rate the following aspects of your attendance at Rowing at Eton Dorney. **Scale 1-10. Extremely good = 8-10; Average = 4-7; Extremely poor = 1-3**



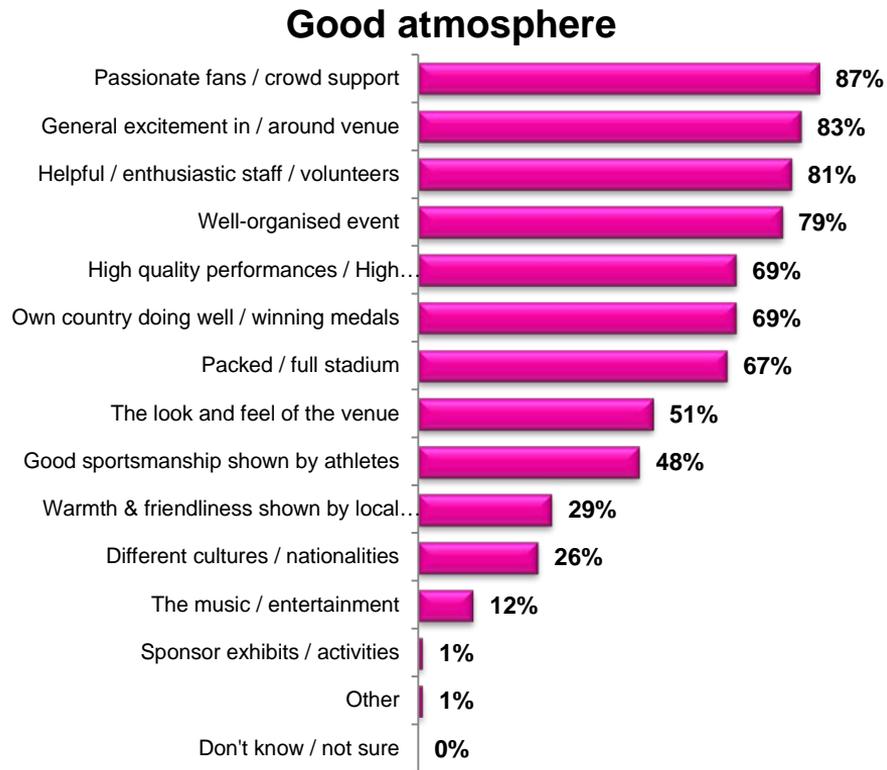
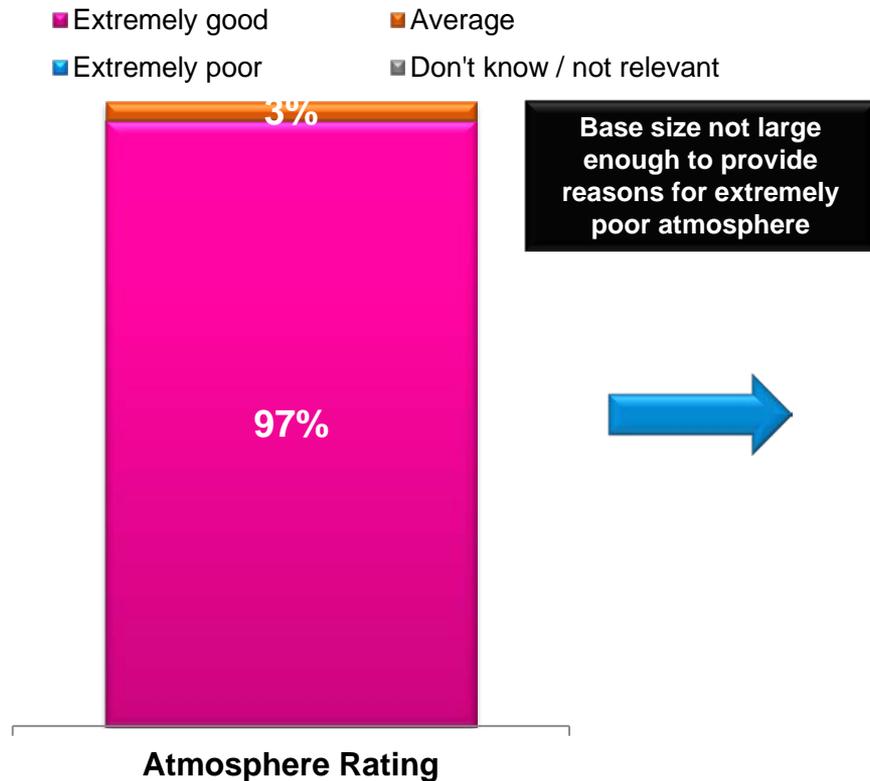
Mean excludes "Don't know / Not relevant"

Based on all spectators who attended the sport / ceremony for which they purchased a ticket

Atmosphere – Post-wave data

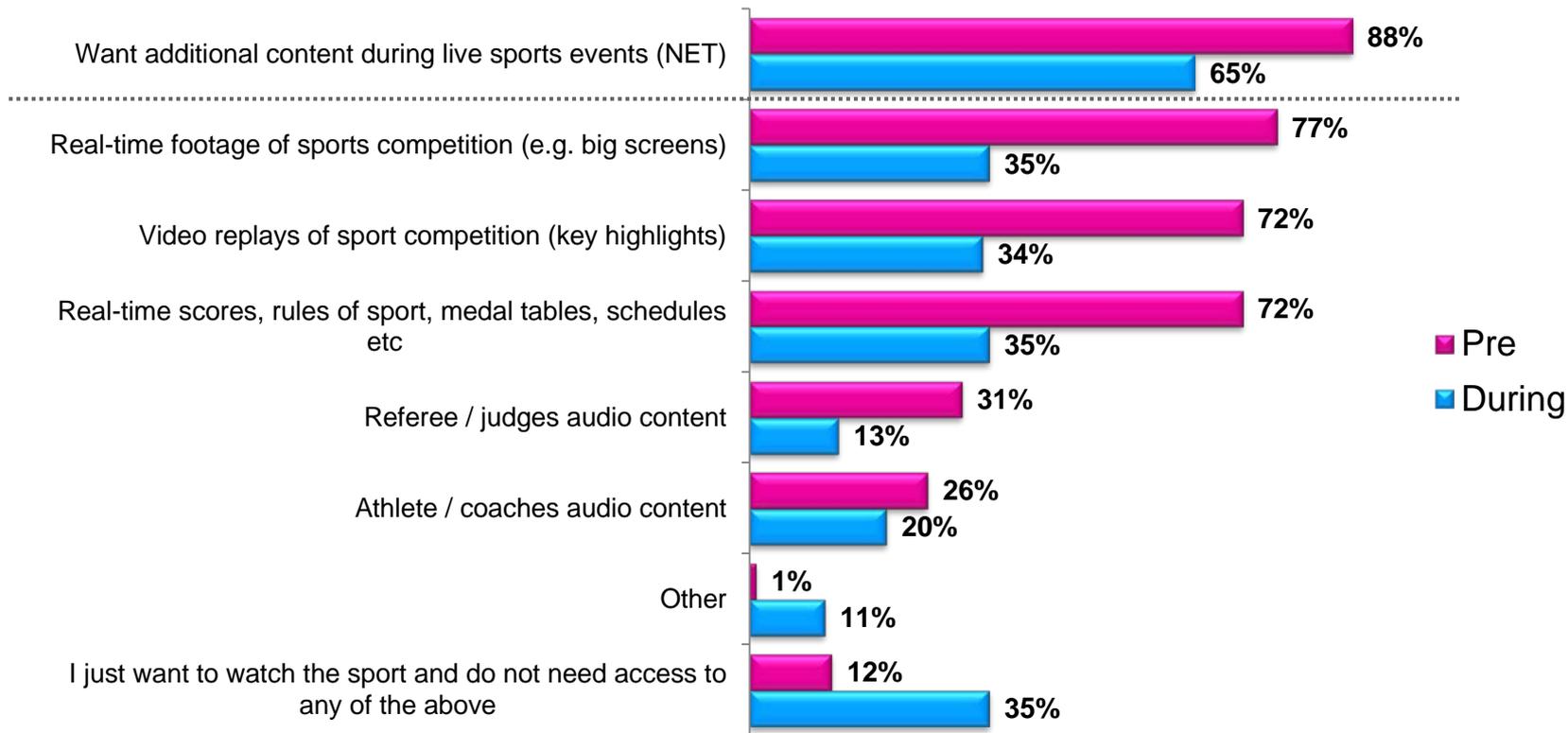
Q34/Q37. Using a scale of 1 to 10 where 1 means "Extremely poor" and 10 means "Extremely good", please rate the following aspects of your attendance at Rowing at Eton Dorney. **"The atmosphere at the event" Scale 1-10. Extremely good = 8-10; Average = 4-7; Extremely poor = 1-3**

Q35. What made the atmosphere at the event / ceremony good?



Other content types required at Rowing – Pre/During-wave data

Q26 / Q27. In addition to watching Rowing in person, what types of content, if any, would you have liked to access during competition?



Value for money at Rowing – Post-wave data

Q40. Which category of ticket did you have for Rowing?

Q41. Do you feel your ticket for Rowing was good value for money?

***Caution small base size**

****Ticket category not sold for the sport / ceremony**

All Sports / Ceremonies	Total Attending	Category AA	Category A	Category B	Category C	Category D	Category E
Good value for money	81	62	70	74	83	88	92
Not good value for money	14	33	24	22	13	9	5
Don't know	4	5	5	5	4	3	2
<i>Base size:</i>	47,770	1,509	6,742	6,234	6,188	6,038	3,985

Rowing	Total Attending	Category AA	Category A	Category B	Category C	Category D	Category E
Good value for money	86	80	82	84	86	92	89
Not good value for money	10	16	14	11	9	7	6
Don't know	4	4	4	5	5	1	4
<i>Base size:</i>	1,783	100	289	223	203	211	199

Thank you!

