

## Ambush marketing – ‘An Olympic event’

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### ABSTRACT

*Sponsorship has outperformed all other marketing communication tools in terms of growth throughout the 1990s. The Olympic Games with its huge audience is perhaps the premier place for companies to showcase their brand(s). But an increasing number of corporate contestants find themselves in a gruelling struggle against ambush*

*marketing attempts by their competitors. Ambush marketing is a growing option that has emerged on the heels of the rising costs for securing sponsorship rights. As sponsorship fees demanded by event owners increase, more marketers find the asking price to be outside the reach of their budgets and are forced to look for communication alternatives. Companies that cannot afford to buy sponsorship, or choose not to, may be attracted to an 'ambush' strategy for defensive as well as offensive reasons. Ambush marketing represents a way to try to blunt and perhaps even neutralise their competitor's investment. Especially, when the official sponsor is non-vigilant, there is growing case evidence of ambush marketing succeeding. So companies buying official sponsorships need to have a strong marketing plan for leveraging their sponsorship investments to minimise any windows of opportunity for would-be ambushers. To the extent that ambush marketing succeeds, it not only defeats the sponsoring company but also risks devaluing the future of corporate sponsorship of events. The Sydney 2000 Olympiad is the battleground for the next major war between sponsors and ambush marketers. The outcome will be important not only to competitors and sponsors but also to the marketing industry as a whole.*

### INTRODUCTION

The Olympic Games is arguably the world's biggest sporting and cultural event and is commonly referred to as 'the greatest show on earth'. Each fourth year as the Olympics approach, sponsorship assumes ever greater importance as a marketing communication tool for many companies. In parallel with growth in sponsorship has emerged the

practice coined ambush marketing by the former head of global marketing at American Express, Jerry C. Welsh.<sup>1</sup> Ambush marketing entails:

A planned effort by an organisation to associate themselves indirectly with an event in order to gain at least some of the recognition and benefits that are associated with being an official sponsor.<sup>2</sup>

'Ambushing' companies are usually the competitors of an official sponsor. Companies that cannot afford to buy a sponsorship, or choose not to, may be attracted to an 'ambush' strategy for defensive and not just offensive reasons. It represents a way to associate themselves with the event but it also represents a way to try to blunt and perhaps even neutralise their competitor's move in buying up the official sponsorship.

#### **Nike – an example**

Nike is considered the benchmark when formulating and implementing successful ambush marketing strategies for the Olympic Games. Nike has a history of 'ambushing' the Olympic Games since 1984. On each occasion, Nike has successfully associated itself with the popularity of the event and has liquidated its investment in ambush marketing activities via increased sales.<sup>3</sup>

Nike 'ambushed' Reebok's sponsorship of the 1996 Atlanta Olympics by strategically blanketing the city's billboards with its 'swoosh' symbol. Likewise, Nike employed this tactic in 'ambushing' Converse's sponsorship of the 1984 Los Angeles Olympics.

Given Nike's history, the Sydney Organising Committee for the Olympic Games (SOCOG) would have been working around the clock to devise strategies to combat Nike's anticipated 'ambush' tactics. However, the late and sudden withdrawal of Reebok from its \$10 million sponsorship of the Sydney 2000 Olympics has seen Nike transform itself from a potential Olympic villain to an Olympic sponsorship saviour.

In light of Reebok's decision, Nike was

quick to fill the void created by its competitor and become an official sponsor. Nike marketing executives would have undergone a complete turnaround from devising a comprehensive 'ambush marketing' campaign to planning value-added sponsorship leveraging activities. The prevention of Nike rejoicing in a successful 'ambush marketing' campaign for the fifth consecutive quadrennial is one less task Olympic authorities have to worry about.

#### **Ambush marketing: cost-effective alternative**

Ambush marketing is used by companies to intrude upon public consciousness surrounding a sports property.<sup>4</sup> Thus, ambush marketers avoid the cost of paying expensive sponsorship fees while gaining the benefits of associating with a sports property at the expense of the sponsor. This renders the practice of ambush marketing as a tempting and attractive alternative to sponsorship. Ambush marketing tactics allow a company to associate with a major sports property without large-scale investment in securing sponsorship rights, thereby, creating the opportunity to achieve brand awareness and brand image objectives at a low cost.<sup>5</sup>

In other words, successful ambushing strategies allow companies to circumvent competitors in achieving communication objectives. At the very least, ambush marketing creates confusion in the consumer's mind which may deny the legitimate sponsor recognition for its investment. The adoption of ambush marketing strategies by companies may be aligned to the perpetual rise of sports sponsorship fees, thereby rendering companies financially unequipped to secure the rights to a sports property.

The practice of ambush marketing came to prominence at the 1984 Los Angeles Olympic Games when Eastman Kodak employed 'ambush' tactics to attack Fuji's Olympic sponsorship. Kodak articulated an 'ambush' marketing campaign where it

became the broadcast sponsor of the Los Angeles Olympics and the 'official film' of the US track and field team.<sup>6</sup> Consequently, many consumers mistakenly believed that Kodak was the official sponsor of the Los Angeles Olympics. On a global scale, proactive ambush marketing efforts and debate are also ostensibly prevalent in the beverage (eg Coca-Cola and Pepsi), fast-food (eg Burger King, McDonald's and Wendy's), credit card (eg American Express, MasterCard and Visa) and sports apparel (eg Adidas, Nike and Reebok) industries.

#### The effects of ambush marketing

In quite a number of circles, ambush marketing is considered an unethical business practice. It is, therefore, not surprising that companies who execute successful ambush marketing campaigns are hesitant to publicly release information about campaign results. Nothing is gained by deliberately inviting the possibility of a public backlash. While some companies do not deny that they indulge in ambush marketing activity (eg Nike), others strongly object to this description and argue that the timing of their activity was just coincidence and not ambush. These are just some of the reasons why research on 'ambush marketing' is both sparse and difficult.

In addition, there are notable problems in evaluating the effects of sponsorship and hence in evaluating the bottom line effects of ambush marketing. It is generally acknowledged that the rapid growth of sponsorship has not been accompanied by a comparable increase in a systematic, coherent body of research<sup>7,8,9</sup> and the same can be said of 'ambush marketing'. In the research that has been conducted, a disturbing number of apparently effective cases of 'ambush marketing' have been revealed — enough to ring some early-warning alarm bells.

One study investigated the 1994 Winter Olympics using controlled testing to evalu-

ate sponsorship awareness effects on brand attitudes and brand purchase intention.<sup>10</sup> Ambush marketing efforts were reported to have a marked impact on respondents. Only one official sponsor out of four product categories tested demonstrated a significantly higher mean score in relation to the sponsorship's effect on brand attitude than its ambushing competitor. Moreover, three ambush marketers obtained higher levels of mean brand purchase intention than the official sponsors in their respective product categories.

In another study of the same event, the 'ambusher' in the fast food category, Wendy's, appeared to outperform the Olympic sponsor, McDonald's, in terms of consumer attitude toward advertising and the brand.<sup>11</sup> Although, at the same time in the credit card category, the official Olympic sponsor, Visa, appeared to successfully fend off 'ambusher' American Express, overall, the findings from those 1994 studies are worrying. They offer evidence that it may be cheaper and more cost-effective for a company to adopt ambush marketing practices than to purchase an official sponsorship package.

Much of the evaluation as to the impact of ambush marketing has been measured in terms of recognition and recall tests (ie sponsorship awareness). On such measures, the effects of ambush marketing appear to have been quite evident at the 1988 Winter Olympics in Calgary. Sandler and Shani<sup>12</sup> found that in only four out of the seven product categories studied, was the official sponsor able to achieve significantly higher levels of awareness than its ambush marketing competitor. These results are reinforced by another study<sup>13</sup> that revealed ambush marketers at the 1992 Albertville Winter Olympics were identified as 'sponsors' more often than official sponsors that failed to sufficiently associate themselves with the event.

A study that sampled more than 2,000 adults as to their awareness of sponsors of

the 1996 European Soccer Championship also cited evidence of ambush marketing effects.<sup>14</sup> Nearly a quarter of those surveyed identified Nike as an official sponsor, thereby, achieving for Nike a higher awareness response than five of the official sponsors of the tournament. Nike's 'ambush' campaign used international soccer players not selected to play in the tournament as well as national soccer teams that were eliminated in the early stages of the tournament.

### Caution

In cases like this, particularly where the 'ambusher' is the market leader, a major limitation arises with evaluating ambush marketing solely on the basis of awareness measures. *Incidental ambush* may be inherent in research findings because unpremeditated ambushing is frequently recorded due to inaccurate information processing by consumers, hence biasing research findings. This simply<sup>15</sup> refers to the situation where respondents incorrectly identify non-sponsors as official sponsors, despite these companies not participating in any ambush marketing activities. Responses may also be influenced by the market leader 'owning' the category itself.<sup>16,17</sup> This claim is supported by empirical evidence detailing that non-sponsors may be wrongly mentioned as official sponsors because of their status and position in a given product category.<sup>18</sup>

Nevertheless, on the basis of the limited findings that have emerged so far, the practice of ambush marketing must represent an undeniably, attractive, strategic option to many companies — especially for those who cannot afford sponsorship. So although it is a strategy that is overlaid with ethical questioning, it is clear that it is unlikely to be ignored or eschewed in the competitive battle of the survival of the brands.

### Sydney 2000 Olympics

In the lead up to the Sydney 2000 Olympics, ambush marketing issues have

been in the spotlight already. In Australia, Qantas and the National Australia Bank have been accused of ambushing Olympic sponsors and direct competitors, Ansett Australia and Westpac respectively.

Most of the criticism is levelled at these companies signing and using individual Olympic athletes in their advertising and promotion. By associating themselves with these athletes, there is a smudging of peoples' understanding of what is Olympic sponsorship and who is the official Olympic sponsor. To the extent that it does this and diverts public attention from the official Olympic sponsor, it can devalue the competitor's official sponsorship investment.

Importantly, these ambush tactics are well within legal parameters. The International Olympic Committee (IOC) does not own Olympic athletes and any legal threat from the IOC against the usage of Olympic athletes by non-sponsors would be deemed an infringement upon restraint of trade legislation.

Regardless of SOCOG's attempts to prevent it, outdoor advertising around Olympic venues provides a tempting opportunity for ambush marketers. Restricting ambush marketing at outdoor events (such as beach volleyball) is especially impossible to control as it is in the public domain. Despite a 'memorandum of understanding' with some major outdoor advertising companies outlining that prime outdoor sites be offered to Olympic sponsors before non-sponsors, SOCOG was unable to achieve a legally binding agreement enforcing that sponsors have first right of refusal. Furthermore, some major outdoor advertising companies explicitly advocated they would not give preference to Olympic sponsors over non-sponsors.

### Clutter problem

For official sponsors attempting to achieve a strong, clear association with the event, clutter makes it that much more difficult and

TABLE 1 SYDNEY 2000 OLYMPIC SPONSORS

TOP Partners	Team Millenium Olympic Partners	Supporters	Providers
<ul style="list-style-type: none"> <li>• Coca-Cola</li> <li>• Fuji Xerox</li> <li>• IBM</li> <li>• John Hancock</li> <li>• Kodak</li> <li>• McDonald's</li> <li>• Panasonic</li> <li>• Samsung</li> <li>• Sports Illustrated /Time Inc.</li> <li>• United Parcel Services</li> <li>• Visa</li> </ul>	<ul style="list-style-type: none"> <li>• AMP</li> <li>• Ansett Australia</li> <li>• BHP</li> <li>• Energy Australia</li> <li>• Holden</li> <li>• Fairfax</li> <li>• News Ltd</li> <li>• Pacific Dunlop</li> <li>• Seven Network</li> <li>• Swatch</li> <li>• Telstra</li> <li>• Westfield</li> <li>• Westpac</li> </ul>	<ul style="list-style-type: none"> <li>• 2UE / ABC Radio</li> <li>• Adecco Lyncroft</li> <li>• Arthur Andersen</li> <li>• Bonds</li> <li>• Bonlac Foods</li> <li>• Boral</li> <li>• CUB</li> <li>• Dunlop</li> <li>• Goodman Fielder</li> <li>• Goodyear</li> <li>• Nike</li> <li>• Perth Mint</li> <li>• Robert Timms</li> <li>• Royal Australian Mint</li> <li>• Shell Australia</li> <li>• Sleepmaker</li> <li>• Streets Ice Cream</li> <li>• TAFE NSW</li> <li>• Traveland</li> <li>• Tyco Int'l</li> </ul>	<ul style="list-style-type: none"> <li>• Avis</li> <li>• Balsam Pacific</li> <li>• Buspak</li> <li>• Cadbury</li> <li>• Cleanevent</li> <li>• Clipsal</li> <li>• Crown Lift Trucks</li> <li>• Diamond Press</li> <li>• Frazer-Nash</li> <li>• Generale Location</li> <li>• George Weston Foods</li> <li>• Gerard Industries</li> <li>• Great White Shark Enterprises</li> <li>• Harley Davidson</li> <li>• Lindemans Wines</li> <li>• Linfox</li> <li>• Mistral</li> <li>• Olex Cables</li> <li>• P &amp; O Services</li> <li>• Pacific Waste Management</li> <li>• Ramler</li> <li>• Rogen Australia</li> <li>• Saunders Design</li> <li>• Schenker Int'l</li> <li>• Show power</li> <li>• Speedo Australia</li> <li>• Surveyor-General's Dept of NSW</li> <li>• Val Morgan</li> <li>• Visy</li> <li>• Waste Services NSW</li> <li>• Woolcott Research</li> <li>• Woolmark</li> </ul>

that much easier for 'ambushers' to capitalise on the consumer's confusion. Sponsorship rights for the Olympic event are sold internationally and domestically via the IOC's exclusive sponsorship package — The Olympic Programme (TOP). Sponsorship

rights can be negotiated and purchased at four different levels:

- IOC;
- SOCOG;
- National Olympic Committees (eg the

- Australian Olympic Council);
- Individual sports-governing bodies (eg Athletics Australia).

Olympic promotions are undertaken by both individual sponsors (including co-operative sponsorship advertising) and the Olympic authorities such as the IOC and SOCOG. Table 1 details the companies that have bought sponsorship rights at differing levels for the Sydney 2000 Olympics.

With so many sponsors promoting their Olympic involvement simultaneously, there is high probability of confusion from clutter as well as an erosion of any perceived uniqueness from Olympic association in the minds of consumers. With so many companies in the mental equation, a kind of camouflage is created for the ambush marketers. The large number of deals may be inevitable given the funds that Olympic organisers need to raise but there are times when event organisers contribute to this confusion by allowing competitive companies to sponsor the same event. This happened, for example, with worldwide marketing rights for soccer's 1994 World Cup which were licensed to Canon for cameras and Fuji for film.<sup>19</sup>

#### **Ambush marketing strategies**

Meenaghan<sup>20</sup> identifies a variety of legal ambush marketing strategies which may be employed by companies in order to generate association with a sports property in the minds of consumers:

#### **1. Broadcast sponsorship of the event**

By sponsoring the broadcast on television or radio, the ambusher has the opportunity to associate itself with the event to a much larger audience than the on-site audience. (For example, three million spectators attended the 1994 World Cup soccer in the United States but the cumulative worldwide television audience was 32 billion.<sup>21</sup>)

During the 17 days of the Sydney 2000 Olympics, the cumulative global broadcast audience is predicted to reach 25 billion (compared to 19.6 billion for the 1996 Atlanta Olympics<sup>22</sup>). Moreover, the recent introduction of virtual signage (ie digital billboards) during particular sports telecasts provides another potential vehicle for marketers to ambush a sports property.

#### **2. Sponsor subcategories within the event and exploit this investment aggressively**

As exemplified by Kodak and Canon earlier, if a competitor has the major category sponsorship locked up, the ambusher may be able to sponsor a lesser category associated with the event and undertake intensive promotional activity to magnify the extent of its involvement.

#### **3. Purchase advertising time around relays of the competitor's event**

An ambusher can deny a competitor receiving the full benefits of their event or broadcast sponsorship by purchasing advertising time in the slots around television or radio relays of the event (eg commercial breaks).

#### **4. Engage in major non-sponsorship promotions to coincide with the Event**

Utilise mainstream media advertising and/or below-the-line promotions in order to achieve its marketing communications objectives during the course of the sports event.

#### **5. Other ambush strategies**

Ambushers may use other creative ambush marketing strategies to suggest involvement with a sports property such as:

- Executing advertisements wishing a particular athlete or team good fortune;<sup>23</sup>
- Giving away licensed souvenirs and free tickets to a sports event;
- Using photographs of famous sporting landmarks as background in

- advertising which coincides with the event; and
- Undertaking congratulatory advertising in the name of the ambusher for sporting identities sponsored by competitors.

### Strategies to combat ambush marketing

There are a number of ways for sponsors to minimise the opportunities and the impact of ambush marketers. Firstly, the sponsor should focus on effectively exploiting and leveraging its purchased association with the sports property. The most successful ambush marketing campaigns arise when a sponsor has left the door open by not properly leveraging its investment.<sup>24</sup> The benefits of properly leveraging sponsorship is reinforced by empirical research<sup>25</sup> which discovered that sponsors who exploited their sponsorship investment diminished the effects of ambush marketing, while those sponsors who did not leverage their investments witnessed ambush marketing efforts confuse consumers when attempting to identify official event sponsors.

Secondly, by sponsoring both the event and the broadcast of the event, the sponsor gains the dual benefit of communicating its sponsorship to both audiences and closes off the opportunity for ambush via the broadcast sponsorship. This may involve seeking a package where sponsorship of the sports property and the broadcast are bundled together,<sup>26</sup> as a single investment rather than two separate outlays and enabling the sponsor to have a direct contractual relationship with the sports property owner and the broadcaster.

In undertaking a broadcast sponsorship, sponsors should seek an arrangement with the broadcaster to prevent competitor advertising before, during and immediately after the event broadcast. However, as this activity attempts to reduce competitive activity, sponsors must be wary of violating restrictive trade practices prohibitions.

A future ambush marketing remedy might entail the design of an integrated sponsorship package which incorporates broadcast sponsorship and advertising. For example, instead of a television broadcaster paying for the television rights of the event, the event owner or the sponsor funds the television broadcast on behalf of the broadcaster in return for advertising space. This would enable the sponsor to gain exclusivity to both the event and the broadcast.

Official sponsors can sometimes bring pressure to bear on the event owners to introduce anti-ambush marketing campaigns. The IOC has introduced such a program. It now takes the practice of ambush marketing so seriously that guidelines, under which proposals are submitted by countries wishing to host the Olympics, must take into consideration the adequacy of the domestic law in guaranteeing the integrity of rights granted to the event sponsors.<sup>27</sup> The IOC's anti-ambush marketing campaign includes the following preventative measures:<sup>28</sup>

- Offering of product category exclusivity sponsorship packages;
- Contractually obligating the host city to discourage competitive sponsorship programmes, and ensure that the host National Olympic Committee monitors the activities of its member sports-governing bodies;
- The imposition of stringent legal restrictions in regards to the use of the Olympic insignia and associated trademarks via The Olympic Insignia Protection Act 1987;
- Threatening ambushing companies with legal action or negative publicity;
- Controlling Olympic imagery and official licensed products;
- Prohibiting third-party contracts to prevent non-sponsors from gaining Olympic association through joint promotions;

- Co-ordinating with broadcasters so that official sponsors have the first option to purchase broadcast sponsorship and advertising rights for the event in each of the relaying countries; and
- Controlling all forms of commercial activity highlighted by the creation of an advertising-free venue environment (i.e. no stadium signage is allowed) in addition to liaising with the host city to control the placement of billboard advertising near Olympic venues. (Special 'hit squads' are used to police ambush marketing activity at all Olympic venues. For example, the Atlanta Centennial Olympic Properties Sponsor Protection Department issued approximately 4,000 cease and desist letters to offending companies during the 1996 Atlanta Olympics.)

Finally, definite infringements upon sponsorship rights and intellectual property may be addressed or remedied by sports property owners/sponsors resorting to legal action against ambush marketers. Legal remedies, which vary from country to country, available to sports property owners/sponsors against some forms of ambush marketing are in the areas of trademarks, unfair competition and misappropriation of goodwill.<sup>29,30</sup>

### Exploding sports sponsorship

Recognition of sponsorship as a promotional tool added another dimension to the marketing communications mix. It was not until the 1984 Los Angeles Olympics that companies realised the necessity to give sponsorship separate status as a promotional tool in the marketing armoury.

This emergence of sponsorship as a promotional tool resulted from a trial and error process<sup>31</sup> with companies having to acquire corporate sponsorship 'know-how' or expertise through their own experiences. Success in sponsorship can therefore be correlated to a learning curve over time.

The growth in sponsorship led to the creation of sports marketing/sponsorship departments within large multinationals<sup>32,33,34</sup> and the emergence of a new profession — sports marketing/sponsorship consultants. Also, advertising and public relations agencies have taken to providing their clients with sponsorship advisory services and acquiring established sponsorship consultancies. (For example, the Interpublic Group, after acquiring Advantage International and API Sponsorship Ltd, recently placed the two sports marketing companies under a single division called Octagon which is accessible to clients of agencies within the Interpublic Group's global network.)

In the 1980s the sponsorship industry was said to be 'blowing out of proportion' with companies attempting to outbid one another in securing exclusive sponsorship rights. If marketers in the 1980s thought that sports sponsorship expenditure was getting out of hand, they would be in for a bigger surprise the following decade. Otker<sup>35</sup> implied that prices paid by companies to sponsor major sports properties had reached a premium in the 1980s and forecast that prices for major sponsorships in the future would stabilise or possibly decrease.

A decade later, that estimate has been shown to be highly inaccurate. From the early 1980s to the turn of the millennium, sponsorship has generated triple-digit and double-digit growth rates *vis-à-vis* other promotional tools.<sup>36</sup> The Olympic Games exemplifies the escalation. Individual sponsorship rights for this event have grown from a minimum of \$4 million for the 1984 Los Angeles Olympics to a record minimum of \$40 million for the 1996 Atlanta Olympics and the forthcoming Sydney 2000 Olympics.

The emergence of ambush marketing has followed closely on the heels of the ever-rising costs of securing sponsorship rights. As sponsorship fees demanded by event owners continue to increase, many marketers are forced to look for communication

alternatives if the sponsorship-asking price is not within reach of their promotional budgets. When put in this position, it should not surprise that ambush marketing makes it into the consideration set of a growing number of marketers.

### The ethical issue

Debate is perpetual whether ambush marketing is ethical, immoral, illegal, an acceptable competitive business practice or simply a creative form of competition. Interpretation of ambush marketing is obviously affected by whether you are a stakeholder in the outcome.<sup>37,38</sup> Typically, sports property owners and sponsors view the practice as being unethical, immoral and sometimes illegal. On the other hand, many companies unable to afford sponsorship fees will regard the practices involved as a legitimate form of defensive, competitive behaviour and perhaps even deny that what they are doing is ambush marketing.

There can be little doubt, however, that ambush marketing depreciates the value of the official sponsorship by reducing the benefits of the sponsor associating with that event. As such it poses a serious threat to the future of sports sponsorship. It is conceivable that it could financially undermine the future staging of some events if sports property owners find they are no longer able to guarantee the promised benefits to sponsors.<sup>39</sup> Without capital injection from sponsors, it is questionable whether the average taxpayer would be willing to finance many of the current sporting events. So this is a threat to sponsors and ambushers alike.

### CONCLUSION

As sport has become a central element of an emerging global culture, marketers have recognised sports sponsorship as an international communication tool of commerce<sup>40</sup> with the capability of providing a vehicle for firms to procure a sustainable competitive advantage.<sup>41</sup> Farrelly and Quester<sup>42</sup> go so far

as to suggest that sports sponsorship will become the optimal positioning tool for international marketers seeking to communicate global messages.

With sponsorship assuming both increasing importance and cost, it is likely that the presence of ambush marketing activity will not diminish but in fact increase in its application and level of sophistication.

Part of the rise in ambush marketing activity can be attributed to sponsors not being pre-emptive and failing to effect plans to maximise the leveraging capability of their sponsorship investment. In doing so, they leave windows of opportunity open for would-be ambushers.

The appeal of the Olympic Games and the audience it lures is a strong incentive for companies to attempt to showcase their brand(s) during this period, either as an Olympic sponsor or non-sponsor. Despite the IOC's comprehensive ambush marketing prevention programme, the practice of ambush marketing will not be eradicated but will hopefully be minimised.

The studies reported here, reinforce the argument that the practice of ambush marketing poses a serious threat to the longevity of sponsorship as a cost-effective promotional tool. To the extent that ambush marketing succeeds, it risks devaluing official, corporate sponsorships and could conceivably threaten the financial viability of sporting events that are highly dependent on successful sponsorship funding like the Olympics. The forthcoming Olympiad in Sydney is shaping up as the official battleground for the next major war between sponsors and ambush marketers. The outcome of that will not only be important to Olympic competitors and sponsors, but to the marketing industry as a whole.

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