

Theorizing Ambush Marketing in the Olympic Games

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Thesis submitted to the
Faculty of Graduate and Postdoctoral Studies
in partial fulfillment of the requirements
for the Doctorate in Philosophy degree in Human Kinetics

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Abstract

This research comprises three interconnected studies that, when considered together, attend to the dissertation's purpose of presenting an integrated conceptual framework for ambush marketing in the Olympic Games. This has been accomplished in two ways: (1) the use of institutional theory, supported by network theory, as a lens to view and understand evolutionary processes in Olympic sponsorship and ambush marketing and (2) the use of grounded theory to build a conceptual framework of ambush marketing from the findings. Broadly, the model suggests the evolution of ambush marketing is partially impacted by, and an outcome of, institutional forces and considerations.

Study I examines the process of institutionalization in the evolution of Olympic sponsorship during its most critical period of growth. It is argued that three key periods of change for sponsorship and two for ambush marketing exist during this time. Furthermore, these periods of change, most specifically concerning anti-ambush marketing practices, suggest the institutionalization of anti-ambush marketing legislation in the Olympic Games.

Study II examines how Olympic ambush marketing stakeholder power and transfer of sponsorship and ambush marketing knowledge has influenced institutional processes toward the state of anti-ambush legislation as institutionalized brand protection. Centrality measures suggest the International Olympic Committee and Organizing Committees for the Olympic Games demonstrate the greatest stakeholder influence within the Olympic ambush marketing network. It is further argued the influence

resulting from the structure of Olympic ambush marketing networks impacts the institutional processes of objectification and sedimentation.

Study III examines the contemporary state of Olympic sponsorship evidenced by institutionalized legislated brand protection. While direct marketing implications of anti-ambush marketing legislation are minimal, it is argued the practice represents a portion of a regime of brand protection and that public relations outcomes of legislated brand protection must be carefully managed as part of a brand management strategy. Similarly, proportionality and managing expectations are arguably important in the understanding and application of such laws. Finally it is suggested that while the Olympic Movement may be viewed as an early adopter of anti-ambush legislation in the mega-event field, the individual character of each Olympic Games will interfere with complete isomorphism.

Acknowledgements

There are no perfect words to express the deep gratitude I have for my family, friends, acquaintances, colleagues, and peers who all have a hand in the completion of this thesis. I am indebted to each and every one of you, as you have helped me along the way. It is important to know that while I will mention many people by name, there are countless others who have offered support, patience, and kindness to me during this process and they should be recognized even if there is no room to do so individually. I thank you and I hope that as I go forward I can provide a positive impact on the lives of others in the same way, and with the same kindness, that you have shown to me.

I would like to start by thanking those people who went out of their way to assist with my data collection, most notably, the staff at the Olympic Studies Centre and Archives in Lausanne, Switzerland and all my interviewees who took time out of their busy schedules to speak with me and share their wisdom and passion. Thank you.

I would also like to thank my colleagues at Laurentian University. You made a tough year manageable and more than that, you made it fun. I will always be grateful for your understanding and direction as I tried to finish this journey while starting a new one. Thank you.

Furthermore thank you to my thesis committee of Dr. Eileen O'Conner and Dr. Teresa Scassa. Your advice, expertise, and support through this process helped guide me to where I am today. I could not have done it without you. Thank you.

Becca, Tessa, Will, Steph, and so many others that I can't name you all; you are the friends and peers who have supported me through this process and beyond. You have

always been there to provide a helping hand, a reassuring word, a shoulder to cry on, a therapeutic glass of wine, or a laugh-a-minute. Thank you.

My deepest thanks go out to my co-supervisors Dr. Benoit Séguin and Dr. Milena Parent. Without your tireless guidance and encouragement I could never have done this. I thank you for believing in me even when I didn't believe in myself and providing me with opportunities that I would never have thought possible. It is because of all you've given me that count myself among the lucky few who can genuinely say I love what I do. From a personal and professional perspective it has been a pleasure to work with you both. Thank you.

Finally, the profound debt of gratitude owed to my family is related to so much more than this thesis. Mom, Dad, Dean, and the rest of my family who has been there for me past and present, you are the source strength that keeps me going and the drive behind everything I accomplish. If I mentioned all you have done for me and all that I'm grateful for, I could write 300 more pages so I will simply say, from the bottom of my heart, thank you and I love you.

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List of Abbreviations

Abbreviation	Full Name
ACOG	Atlanta Committee for the Olympic Games
COA	Canadian Olympic Association
COC	Canadian Olympic Committee
COJO	Le Comité Organisateur des Jeux Olympiques Montréal Montréal Olympic Organizing Committee
FINA	Fédération Internationale de Natation
HOC	Hellenic Olympic Committee
IOC	International Olympic Committee
ISL	International Sports Leisure Marketing Aktiengesellschaft
LAOOC	Los Angeles Olympic Organizing Committee
LOAR	London Olympic Association Right
LOGPGA	London Olympic Games and Paralympic Games Act 2006
OCOG	Organizing Committee for the Olympic Games
OCO'88	Olympiques Calgary Olympics '88
OGKM	Olympic Games Knowledge Management
OPMA	Olympic and Paralympic Marks Act 2007
NOC	National Olympic Committee
NSO	National Sport Organization

ROI	Return on Investment
SLOC	Salt Lake Organizing Committee
TOP	The Olympic Programme (Formerly) The Olympic Partners (Present)
USOC	United States Olympic Committee
VANOC	Vancouver Organizing Committee for the 2010 Olympic and Paralympic Winter Games
WIPO	World Intellectual Property Organization

Chapter 1: Introduction

General Context

As they have grown in scope and prestige, the Olympic Games as a global phenomenon have become a noteworthy area of diverse scholarly interest. There has notably been much attention paid to the impact of the Games on host cities. Scholarly research has focused on a number of themes including the social and economic impacts of the Games (e.g., Lenskyj, 2000; Preuss, 2004), tourism impacts (e.g., Nadeau, O'Reilly & Heslop, 2010; Solberg & Preuss, 2006), environmental impacts (e.g., Chappelet, 2008), legacy (e.g., Girginov & Hills, 2008; Leopkey & Parent, 2012), and urban development (e.g., Burbank Andranovich & Heying, 2001; Chalkley & Essex, 1999).

Another area of Olympic study has been the organizational aspect of the Games. The Olympic Games represent a unique form of organization. While a central governing body oversees them, the actual Games are managed by a group of ever-changing temporary organizations in varying locations. As such they offer the opportunity to examine organizational principles in an altered context. Within this field of study, the two most pertinent areas for the purposes of this dissertation are the use of stakeholder principles (networks) to examine organizing committees (e.g., Parent, 2008) and the management sub-discipline of marketing and sponsorship (e.g., Brown, 2000), specifically including ambush marketing (e.g., Séguin & O'Reilly, 2008). While these two aspects are independently recognized as important to the study of the Olympic Games, their interactions have rarely been examined. Although the study of Olympic

stakeholders is increasingly prevalent, it is argued that they do not work in isolation; rather, they are part of multiple, dynamic networks, which require deeper consideration. More precisely, the configuration of a network allows a researcher to observe the influences stakeholders have, not only on the focal organization, but also directly and indirectly, on each other. While networks are acknowledged as an important part of the marketing functions of an organization (Iacobucci, 1996; Iacobucci & Hopkins, 1992), it has been argued that there is a gap in the literature in relation to networks and sponsorship (Olkkonen 2001; Ryan & Fahy, 2012). As a result, there has been a call to further examine sponsorship-related phenomena, including ambush marketing or what is termed ‘counter-strategies’ of sponsorship, by applying ideas and concepts of network theory (Olkkonen, Tikkanen & Alajoutsijarvi, 2000). Recently an article by Pieters, Knoben, and Pouwels (2012) examined the impact of network embeddedness on corporate performance (as measured by sponsorship relationships). This, alongside research discussing sponsorship in the context of the larger sport network (e.g., Wolfe, Meenaghan & O’Sullivan 1997/98, 2002), and network management (e.g., Ryan & Fahy, 2012) represents an initial move towards research linking sponsorship and network theory, but much work remains to be done. Moreover, there has also been a call by Quatman and Chelladurai (2008a) for the increasing use of network theory specifically in sport management. While some progress has been seen in the areas discussed above and in the examination of the network relationships of the field of sport management itself (e.g., Love & Andrew, 2012; Quatman & Chelladurai 2008b), overall little advancement has been made in applying the tenets network theory in sport management research. In the Olympic marketing context, an examination of the relevant networks offers the

potential for valuable contributions to the field. There is much to be gained from the study of interactions between such groups as sponsors, Organizing Committees, and National Olympic Committees.

The practice of knowledge transfer is recognized by scholars and practitioners as important to marketing processes within the Olympic Games. From its inception, the lifecycle of an Organizing Committee for the Olympic Games (OCOG) is set within the boundaries of Olympic protocol; when the Olympics Games are completed, the OCOG ceases to exist shortly thereafter. However, while organizing committees are themselves temporary, their acquired marketing knowledge is not necessarily so. In 1998, the International Olympic Committee (IOC) created a program entitled Olympic Games Knowledge Management (OGKM), whose purpose is “to streamline the Olympic Games and to ensure that future Games organizers can apply successful practices to their own projects” (IOC, 2006a, ¶ 15-16). Therefore, as the Games evolved into the commercial enterprise they are today, various OCOGs contributed to their acquired knowledge relating to marketing, sponsorship, and ambush marketing. As a result, the current state of marketing within the Olympic Games is arguably a consequence of this longitudinal process of knowledge transfer between the networks of various Olympic Games. Furthermore, as marketing and sponsorship related strategies are proven successful and are shared between networks, they arguably become institutionalized, whereby they become part of the accepted norms, beliefs and values that assist the coordination of Olympic marketing and sponsorship. However, despite the apparent connections between networks, knowledge transfer and institutionalization, there are few studies explaining how these processes may occur within an Olympic sponsorship framework.

Ambush marketing, defined as “a planned effort (campaign) by an organization 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” (Sandler & Shani, 1989, p. 11), has become an important area of scholarship within marketing, sports marketing, and event studies for many reasons. While ambush marketing has typically been studied as part of sport marketing, the argument can be made that it is a marketing phenomenon that is merely best studied in the context of sport, as that is where it typically occurs. The study of ambush marketing is linked to other marketing concepts such as sponsorship valuation, sponsorship evaluation, activation, and brand protection. In addition to answering calls to widen the scope of research in the sport marketing field (Peetz & Reams, 2011) such links to other marketing concepts mean research in ambush marketing can also provide the opportunity to widen the scope of research and understanding in marketing and sponsorship generally. Ambush marketing is also an interesting and important area to study as it impacts a variety of stakeholders in a variety of ways. While it is beyond the scope of this dissertation to examine each of these in-depth, research in the area can provide contributions towards understanding these differing impacts and help to build a clear picture of the related outcomes and processes that affect organizational fields (i.e., the Olympic Games), groups (i.e., the International Olympic Committee) and people (i.e., the general public). Furthermore, ambush marketing is a genuine, practical issue that those working with mega-events all over the world deal with on a day-to-day basis. Learnings in this area have the potential for real practical value for those who work in marketing and sponsorship particularly where it might impact the ability to fund an event.

Sutton (2011) recently identified issues around the funding sources for mega-events as a major trend likely to be the focus of research in sport marketing over the next 20 years. From the Olympic perspective the increasing value of the Olympic Games as a sponsorship property has pushed the issue of ambush marketing to the forefront of the IOC's sponsorship concerns. Since the inception of the first integrated worldwide exclusivity-based sponsorship program called The Olympic Program (TOP) in 1985, Olympic sponsorship returns increased from \$96 million¹ (TOP I) to \$957 million in 2012 (TOP VII), providing the second largest contribution to IOC revenues after broadcasting rights (IOC, 2012a). There is a perceived need to ensure the protection of Olympic sponsors from ambush marketing in order to aid in covering the ever-increasing costs of hosting the Games. Most pertinently, recent attention has begun to focus on protecting the exclusivity of official sponsors, notably through anti-ambush legislation. However, while such legislation has not been entirely ignored in academic writing, for the most part, it is highly descriptive and examined in relation to judicial precedents or a description of the laws in place (e.g., Bean, 1995; Berger-Walliser, Williams, Walliser & Bender, 2012; Bhattacharjee & Roa, 2006; Hoek & Gendall, 2002; Kendall & Cuthroys, 2001; McKelvey & Grady, 2004; Moorman & Greenwell, 2005; Nish, 2003; Scassa, 2008). There are few studies that relate to: 1) the impacts of such legislation; 2) a more organizationally focused analysis of ambush marketing; and 3) the examination of legal issues in a management and marketing framework. Moreover, it will be argued here that such legislation represents the most contemporary outcome of Olympic ambush

¹ Unless otherwise stated all figures in this dissertation are noted in United States dollars.

marketing institutionalization processes, to the point where such legislation has moved from a value-added part of a host city bidding to an IOC bid requirement.

The progression of anti-ambush legislation from unsolicited benefit to bid requirement represents governments' willingness to grant legitimation to the strict brand protection strategies now put forward by the IOC as part of Olympic sponsorship practices and, as a result, of key learnings over time. Concern exists, however, for the potential consequences of taking such legislation one step further (Scassa, 2008; 2011). For example, the passing of extremely broad legislation for the London 2012 Olympic and Paralympic Games leaves the act of infringement very much open to liberal interpretation and creates an "association right" which moves beyond protecting the tangible trade-marks (*London Olympic Games and Paralympic Games Act*, 2006). As described by Scassa (2011) "an association can be created by implication, and such laws typically enumerate lists of rather ordinary words which, if present, might serve to suggest such an association [...] This right has grown from a prohibition on misleading consumers into believing there is an association to a prohibition on merely suggesting an association (pp. 362-363). In preparation for the London Olympic Games, a "right of association" was passed in the form of the London Olympic Association Right (LOAR). In New Zealand, another step was taken with the creation of the *Major Events Management Act* in 2007. This Act offers permanent protection for all major sporting events in New Zealand and can be invoked whenever an event is taking place (*Major Events Management Act*, 2007). This suggests that the isomorphic practice and legitimation of anti-ambush legislation could eventually lead to what may be termed 'mega-event martial law.' Such a 'martial law' would see governments worldwide enact

similar legislation providing permanent, arguably extreme protection, which can be invoked as required to serve the interests of any mega-event organizing committees and international governing bodies. While the above claims for legitimation, isomorphism, and ‘mega-event martial law’ in relation to anti-ambush marketing legislation can be inferred through coherent presupposition, analytic research is required in this area to support (or not), describe, understand, and explain such inferences.

In summary, there is a large amount of anecdotal evidence for the discussed trends, but no coherent framework to explain or understand them. While a respectable field of study in the area of ambush marketing has evolved over the last 20 years, there is by no means an extensive theoretically-grounded literature base for the topic of ambush marketing which one could use to explain and understand the current situation. Literature in the field, and arguably the larger disciplines of marketing and sport marketing, is still highly descriptive (Peetz & Reams, 2011; Pitts, 2002). Particular to sport marketing, although it has been noted in a recent content analysis of *Sport Marketing Quarterly* that there is now a greater variety of both and quantitative methodologies in sport marketing, it appears this has come at the cost of conceptual development within the field (Peetz & Reams, 2011). While there is evidence of theory-driven research in the sport marketing field (e.g., Berrett & Slack, 1999; Gladden, Milne & Sutton, 1998; McCarville & Copeland, 1994), it can generally be argued that little theory has been introduced into ambush marketing research either as a lens through which to examine the practice and further develop existing theories or through the creation of a specific ambush marketing theory itself. There has been a call to rectify such issues through the increased use of theory within the sport management field (Doherty, 2012; Slack, 1996; Zeigler, 2007).

Purpose

The overall purpose of this dissertation was to present an integrated conceptual framework for ambush marketing in the Olympic Games. This has been accomplished in two ways. The first involved the use of institutional theory, supported by other established organizational theories, as a lens through which to view and understand the evolutionary process that has taken place in Olympic sponsorship and ambush marketing. This was examined both as it happened in the past and as it is currently occurring. The second involves the use of grounded theory techniques (Charmaz, 2006; Glaser & Strauss, 1967) to build a conceptual framework of ambush marketing from the emergent findings. To serve this purpose and begin addressing the gaps identified above, this research project consisted of three interconnected studies that were then considered together in the general discussion in order to serve the dissertation's purpose.

The objective of the Study I was to examine the process of institutionalization in the evolution of Olympic sponsorship practices during their most critical period of growth. As such the following research questions were examined: (1) How have Olympic sponsorship and ambush marketing practices evolved over the last 35 years?; (2) What are the precipitating jolts, facilitators and barriers of this change? And; (3) How have they impacted processes and states of institutionalization?

The objective of Study II was to examine how Olympic ambush marketing stakeholder power and transfer of sponsorship and ambush marketing knowledge may have influenced institutional processes toward the state of anti-ambush legislation as institutionalized brand protection. This was addressed by examining the following research questions: (1) How does network positioning impact stakeholder power among

Olympic ambush marketing stakeholders?; (2) How does sponsorship and ambush marketing knowledge travel across the Olympic marketing network and; (3) How has this influenced Olympic sponsorship practice most notably related to ambush marketing institutionalization processes?

Finally, Study III examined the contemporary state of Olympic sponsorship as evidenced by institutionalized legislated brand protection. To attain this objective, the following research questions were addressed: (1) What are the marketing implications of such legislation?; (2) How might the effects of such legislation influence people and organizations? and; (3) What are the potential global precedents for future brand protection and sponsorship practice related to global isomorphism and ‘mega-event martial law’?

Each of these studies, when taken together, provided a foundation for theorizing ambush marketing in the Olympic Games. Study I allowed for an understanding of the way the practice has evolved over time and such an understanding of what happened in the past provides direction and context for the future. Study II allowed for an examination of the ‘who’ element of theory (Whetten, 1989). Through an understanding of those stakeholders who are involved in the ongoing evolution of ambush marketing, their ability to influence processes, and the tools that moderate this, greater insight was gained into how actors can influence the practice going forward. Finally, examining the contemporary state of ambush marketing provided an understanding of the current context and state of the issue in the Olympic movement offering a foundation from which to further discuss and theorize about its future development. All of this, in turn, enhances

the understanding of ambush marketing and continues to advance the use of theory in sport marketing research.

Dissertation Outline

This dissertation is organized in the monograph format and consists of nine chapters in total. Chapter One, the current chapter, provides the general context and rationale for the dissertation, discusses its purpose and objectives and outlines the anticipated contribution of the dissertation to theory, research and practice. Chapter Two offers a brief review of the significant literature on the topics of Olympic sponsorship, ambush marketing and anti-ambush marketing legislation. The theoretical and conceptual framework is outlined in Chapter Three and includes consideration of theory as a general concept, institutional theory, network theory, and relevant legal perspectives. Chapter Four describes the methodology of the dissertation, comprising of details related to the overall research design, case study settings, methods, data collection, data analysis, and research quality. Chapter Five consists of the results and discussion for Study I, investigating the institutionalization of Olympic sponsorship and ambush marketing. Chapter Six provides the results and discussion for Study II, an examination of network structures and knowledge transfer in Olympic sponsorship and ambush marketing, while Chapter Seven looks at the results and discussion for Study III, considering the impacts and implications of anti-ambush marketing legislation and institutionalized brand protection. Chapter Eight is the general discussion chapter providing an overview of the three studies and developing a conceptual framework for ambush marketing in the Olympic Games in addition to the dissertation's limitations and future research directions.

Chapter 2: Review of Literature

Brands, Olympic Sponsorship & Ambush Marketing

Brands and brand management.

The success of the Olympic marketing program is directly tied to the value and strength of the Olympic brand. At its foundation, a brand is described by Aaker (1991) as “a distinguishing name and/or symbol (such as a logo, trade-mark, or package design) intended to identify the goods or services of either one seller or a group of sellers, and to differentiate those goods or services from those of competitors” (p. 7). It is well recognized however that a brand is not just about a tangible image or a symbol, but also embodies a complex array of intangible associations. As Aaker notes in the above definition, a brand is a way for an organization to differentiate themselves from their competitors but it can also be used as a source of value and predictor of quality (Temporal, 2002). In the case of the Olympic Movement, although the five interlocking rings are the most powerful visual representation of the Olympic brand, it is the key associations of excellence, friendship and respect (IOC, 2006b) that help instill much of the value into the brand; so it is important to examine key elements of this concept and some of the literature surrounding it.

Looking generally at brand research in sport events, one area of study that recently emerged involves examining the creation of a sport event brands. Parent and Séguin (2008), using a case study of the 2005 FINA (*Fédération Internationale de Natation*) World Championships, developed a model of brand creation for international large scale sporting events. The purpose of the study was to examine how an organizing

committee might be able to “build their brand more effectively and efficiently” (p. 527). It was found that leadership, context and the nature of the event could, to varying degrees, have an important impact on brand creation. It was further suggested, however, that there were likely to be other factors in brand creation, specifically in varying sport contexts, and that future research should seek to examine this. This was followed by Parent, Eskerud and Hanstad’s 2012 study that examined brand creation in international recurring sports events. It used the model proposed by Parent and Séguin to examine case studies of two recurring event. From the findings, the authors expanded the original brand creation model to include core values, induced event experience elements, and institutional affiliations as factors that impact the event branding process.

While brand creation is an important element in the branding process, the ultimate goal of a strong brand should be to acquire positive brand equity. That is, a distinct set of intangible assets linked to the brand name or symbol that provide additional value to the consumer (e.g., confidence in purchase decision) and the organization (e.g., competitive advantage) (Aaker, 1991). These assets have been divided into five dimensions that represent the building blocks of brand equity: brand loyalty, brand awareness, perceived quality, brand associations and other proprietary brand assets (Aaker, 1991).

Brand loyalty is traditionally described by Aaker (1991) as the degree to which consumers feel an attachment to a brand, with high brand loyalty meaning a reduction in the likelihood that the actions of a competitor might have a negative impact on the brand, and a more predictable profit stream for the organization (Boone, Kochunny, Wilkins, 1995). Brand awareness is the second dimension of brand equity. The level of recognition and recall that consumers demonstrate for a particular brand within a product category is

indicative of its associated level of brand awareness. A high level of brand awareness contributes to the overall value of a brand in four keys ways: (1) acting as anchor to which consumers attach particular meanings and images to that brand in their mind, (2) providing a familiarity with the brand and its products which increases the comfort level of the consumer, (3) providing a sense that there is a reason for this awareness which signals it has a level of substance and commitment in its product and (4) increasing the likelihood of a brand being considered among an evoked set in a purchase decision (Aaker, 1991). The third dimension of brand equity is perceived quality, which is a judgment by the consumer of the attributes and advantages of a product relative to both its intended purpose and competitor alternatives (Aaker, 1991). The unique needs, wants, and expectations of individual consumers means that perceived quality of a product may differ from consumer to consumer making it difficult to objectively assess the overall perceived quality associated with a brand (Aaker, 1991). Nevertheless, those products with a generalized level of perceived quality are able to create value through such advantages as allowing for the option of premium pricing (Aaker, 1991). Brand associations are the fourth dimension of brand equity and represent anything that consumer has 'linked' to a brand in their memory (Aaker, 1991). The strength, favourability, and uniqueness of these associations are argued by Keller (2003) to be contributing factors in the ability of brand associations to impact brand equity. Finally, other proprietary brand assets simply refer to alternative ways the brand is able to protect itself from competitors doing damage to the brand, which may include such elements as patents, trade-marks and networks (Aaker, 1991).

In recent years, the application and expansion of the brand equity concept to sport marketing research has expanded. It has however, rarely been studied in an Olympic context. Early research in this area was undertaken by Gladden et al. (1998), who modified Aaker's brand equity framework in order to develop a framework for brand equity in Division 1 college athletics in the United States. They noted that various team, university, and market related antecedents impacted the creation of brand equity. They also outlined specific consequences of brand equity such as national media exposure and individual donations (Gladden et al. 1998). More recently, research involving brand equity in sport marketing has included examining how different elements of sponsorship impact brand equity (Henseler, Wilson & Westberg, 2011), further adapting a brand equity model for determining spectator-based brand equity (Ross, 2006), and empirically testing this model (Ross, Russell, & Bang, 2008).

Specifically looking at the brand equity of the Olympic Games in their book on Olympic marketing, Ferrand, Chappelet, and Séguin (2012) suggested that the Olympic brand has achieved a high level of brand equity. They argued that high renewal rates among sponsors and broadcasters, willing cities lining up to host the games, and ever-increasing ratings and tickets sales signal high level of brand loyalty. IOC brand research has also demonstrated the broad awareness of the Olympic brand worldwide with evidence that the Olympic rings are among the most recognized symbols in the world, with 98% awareness globally (IOC, 2006b). Furthermore, they reason that the Olympic brand can demonstrate a high level of perceived quality as the Olympic Games are highest level of competition in the world in many sports, attracting the best athletes in the

world, while TOP partners are leaders in their industries. Lastly, Ferrand et al. make the argument that the Olympic brand has strong, favourable, and unique associations.

Brand management is another important part of brand research and understanding. Keller (2003) defines strategic brand management as “the design and implementation of marketing programs and activities to build, measure, and manage brand equity” (p. 44). It is suggested that there are four steps in the process of brand management: (1) identifying and establishing brand positioning and values, (2) planning and implementing brand marketing programs, (3) measuring and interpreting brand performance and, (4) growing and sustaining brand equity (Keller, 2003). The first step, identifying and establishing positioning and values, refers to a process of determining what the brand should represent. What are those core values that exemplify the direction, principles and beliefs of the brand and organization? Positioning refers specifically to the way in which an organization or product is situated in the minds of consumers with respect to their competitors. Ideally, a brand would have a unique, superior, and valued place in the mind of consumers (Keller, 2003). Planning and implementing brand marketing programs involves building two key dimensions of brand equity, that is, using a variety of marketing and promotional strategies to develop greater brand awareness and create strong, favourable and unique associations (Keller, 2003). The third element of strategic brand management is important in order to understand the success of these marketing programs. Keller noted that measuring and interpreting brand performance could be accomplished by participating in a brand audit or use of a brand equity measurement system. A brand audit is defined as an “externally, consumer-focused exercise that involves a series of procedures to assess the health of the brand, uncover its sources of

brand equity, and suggest ways to improve and leverage its equity” (Keller, 2003, p. 162). Lastly, when brand equity has been achieved, strategic brand management is still important as a brand manager must grow and sustain the brand equity in order to realize long-term competitive advantage. There are various ways to accomplish this including: the development and management of brand extensions, enhancing brand equity over time through the reinforcement or revitalization of the brand, and establishing brand equity over various market segments through consumer behaviour research and adapted brand programs to meet the identified needs, wants and motivations of the new consumer segments (Keller, 2003).

As previously mentioned with regards to Olympic brand equity, despite its recognized power and value, academic research relating specifically to the Olympic brand is scarce. It is often discussed in the context of ambush marketing and brand protection (e.g., Ellis, Scassa, & Séguin, 2011b; Preuss, Gemeinder, & Séguin, 2008) but is rarely examined in its own right. Some articles that examine the Olympic brand specifically have done so from varying perspectives. For instance using a more sociological lens, Maguire, Barnard, Butler and Goulding (2008) examined paradoxical appropriation of the ‘Celebrate Humanity’ campaign as a method of building brand awareness by using the foundational Olympic values and global identities it seeks to promote as a marketing tool while Majid, Chandra and Joy (2007) sought to discuss the growing interest in the Olympic Winter Games, suggesting that the strength of the Olympic brand was, alongside experiential aspects of the Games, a primary theme in the development and growth of interest in the Olympic Winter Games. From a marketing-focused perspective, Séguin, Richelieu and O’Reilly (2008) examined corporate and

consumer perceptions of the Olympic brand, including, amongst other elements, the assets and liabilities of the brand from both perspectives. This information was then used to develop a suggested strategic Olympic brand management system that considers the role of varying stakeholders, including consumers, in achieving a high level of Olympic brand equity. Finally, Séguin and O'Reilly (2008) examined current issues facing the IOC with regards to its marketing programs through in-depth interviews with sponsors and senior Olympic marketing executives. They argued that ambush marketing and clutter were potentially having a negative impact on the Olympic marketing program by weakening the value of the Olympic brand and decreasing the effectiveness and efficiency of Olympic marketing programs. Like Séguin et al. they proposed a strategic brand management model. In this instance, however, the model focused specifically on managing the impact of ambush marketing and clutter. Their model outlined the role of the IOC, NOCs and sponsors in managing the Olympic brand and the possible outcomes for consumers if such management is undertaken. Although each of the articles discussed in the above section have contributed to the knowledge on the Olympic brand, more remains to be done.

Olympic sponsorship.

Ultimately ambush marketing is a product of the evolution of sponsorship. This is no different within the Olympic movement, and it has even been argued that ambush marketing is a practice that originated within Olympic sponsorship. As such it is important to make note of literature related to the concept of Olympic sponsorship when conducting a review of ambush marketing literature. Despite once being intimately connected to, or in some cases used interchangeably with, the concept of philanthropy,

sponsorship now represents a distinct type of relationship. As with many topics, a definition of sponsorship is not something that is easily agreed upon by scholars. A common definition however has been provided by IEG (2013) who identify sponsorship as “a cash and/or in-kind fee paid to a property (typically in sports, arts, entertainment or causes) in return for access to the exploitable commercial potential associated with that property.” One of the key aspects of any definition of sponsorship, and the vital element which separates it from philanthropy, is the concept of a mutually beneficial exchange. Inherent in any sponsorship agreement is the fact the property selling the sponsorship will receive money or products they need to operate in exchange for allowing the sponsoring company to link their own brand to that of the property and all it may signify, or the exposure it may bring.

Sponsorship within the modern Olympic movement is by no means a new phenomenon with current TOP sponsor Coca-Cola having been involved in some capacity since 1928. However prior to the 1970’s corporate involvement in the Olympic Games more closely resembled philanthropy than what is now identified as sponsorship. Nevertheless since the 1970’s the rise of Olympic sponsorship has been swift and lucrative. With the IOC’s realization that their dependence on broadcast rights fees as their sole source of income, in combination with the rapidly escalating cost of hosting the Games posed a threat to their existence, the impetus towards what is now considered to be Olympic sponsorship was set in motion. A definition of modern Olympic sponsorship can be put forth simply by narrowing the general definition of sponsorship outlined above. Therefore for the purposes of this research Olympic sponsorship is defined as a cash and/or in-kind fee paid to an official Olympic property (i.e., IOC, NOC, OCOG) in

return for access to the exploitable commercial potential of the Olympic movement, its symbols and associations. The current Olympic sponsorship program involves the TOP program a worldwide sponsorship program, managed by the IOC. The TOP Program offers a limited number of multi-national partners product category exclusivity with regards to the exploitation of their sponsorship globally. This includes partnerships with the IOC, all NOCs, and the OCOGs that exist during the four-year quadrennial represented by each version of TOP. Table 2-1 outlines the progression of the TOP program beginning with TOP I in 1985.

TABLE 2-1: The Evolution of the TOP Sponsorship Program 1985-2012

	TOP I 1985- 1988	TOP II 1989- 1992	TOP III 1993- 1996	TOP IV 1997- 2000	TOP V 2001- 2004	TOP VI 2005- 2008	TOP VII 2009- 2012
Number of Companies	9	12	10	11	11	12	11
Number of NOCs	159	169	197	199	202	205	205
Revenue generated in millions	96	172	279	579	663	866	957

(IOC, 2012a)

In addition to the TOP program, Olympic sponsorship also includes a domestic sponsorship program in the host country of each Olympic and Winter Olympic Games. Under the direction of the IOC, this program is managed by each OCOG who, as a requirement of the Marketing Plan Agreement, consolidates all marketing efforts in the host country with the local NOC (IOC, 2010). The domestic sponsorship program offers product category exclusivity, for those categories not covered under the TOP program, only within, and relating to the host country territory. For instance a domestic partner can use the official symbol of the OCOG but not the Olympic rings as a standalone. The

domestic program also covers multiple level of sponsorship including, but not limited to, sponsors, suppliers, and non-commercial partners. Table 2-2 offers an overview of domestic sponsorship programs beginning in 1996.

TABLE 2-2: Olympic Games Domestic Sponsorship Program Overview 1996-2012

Olympic Games	Number of Partners	Revenue and Support (million)
1996 Atlanta	111	426
1998 Nagano	26	163
2000 Sydney	93	492
2002 Salt Lake City	53	494
2004 Athens	38	302
2006 Turin	57	348
2008 Beijing	51	1,218
2010 Vancouver	57	688
2012 London	44	1,078

(IOC, 2012a; Rogers, 2012)

As the figures in Tables 2-1 and 2-2 show, Olympic sponsorship programs now generate huge amounts of revenue. As a result, they have become vital in ensuring the long-term sustainability of the Olympic Games, and have captured the interest of marketing and sponsorship scholars. The next section will briefly outline some of the research that has taken place specifically with regards to Olympic sponsorship.

As with any field of study, there has been a descriptive base of literature for Olympic sponsorship that focuses on the evolution of the practice and emerging trends, issues and challenges faced by those involved in Olympic sponsorship. Giannoulakis, Stotlar and Chatziefstathiou (2008) for instance provided a broad overview of Olympic sponsorship from its origins until the period just before Vancouver 2010 including some projections for Vancouver and London 2012. They also went into greater detail when discussing what they found to be the significant challenges facing Olympic sponsorship.

They concluded by noting those issues and strategies they felt pertinent to Olympic sponsorship in the 21st century. These were suggested to be: the escalating price of TOP sponsorship, the dangers of perceived over-commercialization on the nature of the Games, the financial dependence on sponsorship for Games feasibility, a cluttered sponsorship structure, ambush marketing, and as described by the authors, a need for “affiliating with sponsors that do not simply create ‘noise’ but with those sponsors who create ‘meaning’” (Giannoulakis et al., 2008, p. 267). Also looking at emerging issues for Olympic sponsorship, a more focused study by Brown (2000) specifically examined the lead up to the Sydney 2000 Games and the role of the local tourism industry in realizing a successful sponsorship program. He suggested several emerging challenges for host cities in this area including: the increasing importance of marketing stakeholder relationships, the need for OCOGs to engage in complimentary promotions with local tourism boards, the creation of strategies for linking tourism development with the communications of sponsors, a greater understanding on the needs and wants of sponsor hospitality guests, and further research on the outcome of integrated brand promotions (i.e., Olympic brand, sponsor brand and host city/country brand).

A second area of Olympic sponsorship research has been an examination of sponsor strategies and objectives. For instance with regards to Olympic sponsor activation strategies, Davis and Tsiantas (2008) proposed a model that seeks to evaluate the optimal activation strategies for National Olympic sponsors. Examining national sponsors from the 2004 Athens Games, they suggested sponsors with high involvement products (much time and effort goes into product choice) should develop a relationship oriented activation strategy focusing on image and knowledge enhancement, while those

sponsors with a low involvement product (emotional and impulsive purchases) should focus on a sales oriented approach such as running promotions and point-of-sale co-branded advertisements (Davis & Tsiantas, 2008). Research on sponsorship objectives, specifically evaluation strategies, has also been undertaken by Ludwig and Karabetsos (1999). With regards to sponsor objectives they found that exclusivity, increased public awareness and image benefits were most sought after by sponsors of the 1996 Games in Atlanta. That same group of sponsors was also found to each have their own evaluation process related to these objectives with pre and post Games benchmarks to compare, while also focusing on hospitality, media and sales outcomes (Ludwig & Karabetsos, 1999; O'Reilly & Madill, 2009).

The most concentrated focus of research in Olympic sponsorship appears to be around measuring various sponsor impacts and outcomes (e.g., Farrell & Frame, 1997; Kinney & McDaniel, 1996; Papadimitriou & Apostolopoulou, 2009; Sandler & Shani, 1993; Stipp & Schiavone, 1996; Stotlar, 1993; Wally & Hurley, 1998). Sponsor's corporate image and reputation is one area where impacts of Olympic sponsorship have been measured. Both Wally and Hurley and Stipp and Schiavone found that involvement in Olympic sponsorship provided positive benefits in these areas. It is surprising to note, however, that Wally and Hurley also found such benefits do not seem to be dependent on the sponsor's level of monetary involvement or the length of their association with the Olympic Games. Another area of interest is the ability of Olympic sponsors to achieve competitive advantage as a result of their Olympic involvement. Barney (1991) defined competitive advantage as "when [a firm] is implementing a value creating strategy not simultaneously being implemented by any current or potential competitors" (p. 102).

Papadimitriou and Apostolopoulou (2009) used a multi-case study method to examine how sponsors of the 2004 Athens Olympic Games may have leveraged their investment to achieve competitive advantage and found that those companies who took an active approach to activation, using the sponsorship as a strategic resource, worked harder to gain the potential competitive advantage offered by the property. They suggested that infusion of additional tangible assets (i.e., money for activation on top of the initial sponsorship fee), utilizing available intangible assets (i.e., Olympic brand equity and global reach), and a recognition of the importance of organizational capabilities in sponsorship and marketing, as business activities which can perhaps create a position of competitive advantage for Olympic sponsors (Papadimitriou and Apostolopoulou, 2009). A last example of an area of research related to impacts and outcomes of Olympic sponsorship, deals with consumer recall, recognition, and response (Sander & Shani, 1993; Stotlar, 1993). For example, examining the consumer reactions to Olympic sponsorship, Sandler and Shani (1993) found that the activation of Olympic sponsorships was required in order for a sponsorship to be truly effective with regards to sponsor recall. Importantly however, while consumers tended to approve and appreciate the practice of Olympic sponsorship, it did not seem to affect their purchasing decisions. The authors note that this suggests importance should be placed on corporate objectives such as image transfer, over those related to measurable return on investment (ROI) (Sandler & Shani, 1993). Another study in the area of consumer considerations was more specifically focused on the impact of the structure of Olympic sponsorship programs on consumer understanding. Stotlar measured levels of consumer awareness of TOP sponsors and USOC sponsors at the Winter Olympic Games. It was found that while

Coca-Cola had a recall rate of 50.2% other sponsors fared much worse, with the next highest rate of recall being Visa at 15.5% (Stotlar, 1993). General conclusions also noted that consumers were unable to differentiate between the TOP partners and the national sponsors. Finally, this study seemed to contradict Sandler and Shani's (1993) seminal finding that purchase behaviour is unaffected by sponsorship as 66% of respondents indicated that Olympic sponsorship positively impacted their purchasing habits and only 28% indicating it did not (Stotlar, 1993).

Finally, a key area of Olympic sponsorship research, which has been described as "a sub-field of growing significance to sponsors" (Brown, 2000, p. 72), is ambush marketing. As this is the focus of this research project, ambush marketing and its related literature is discussed in greater detail below.

Ambush marketing.

As the amount of money invested in event sponsorship increases, so too will the efforts of organizers and sponsors to protect that investment. At the same time, as the global appeal of mega-events like the FIFA World Cup continues to expand in size and diversity, with new technologies and activation opportunities emerging, those companies without official sponsorship rights are devising new and resourceful ambush marketing campaigns. For this reason ambush marketing represents an area of ever-increasing interest in the marketing and event management literature. Ambush marketing is a relatively new area of study with its roots traced to the late 1980's when famous ambush campaigns, such as Kodak versus Fuji and Visa versus American Express, brought the practice to the attention of marketing scholars. To begin, it is important to understand what is meant by the term ambush marketing; this is, however, more easily said than

done. While numerous definitions have been presented since the late eighties, there continues to be serious divergence in the understanding and definition of the practice (e.g., Crow & Hoek, 2003; McKelvey & Grady, 2008; Meenaghan, 1994). As with many other divisive concepts, the tone and breadth of the definition, in many cases, depends on the personal circumstances and experiences of the person responsible for that definition. For the purposes of this dissertation, the definition of Sandler and Shani (1989) will be put forward, as it is among the first from academic sources and is still widely used in literature today. They define ambush marketing as “a planned effort (campaign) by an organization 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” (1989, p. 11). Crompton (2004) put forth seven categories of ambush marketing techniques that cover the most often used practices. These include: (1) sponsorship of the broadcast of the event, (2) purchasing advertising time in and around event broadcasts, (3) sponsorship entities other than the organizing body (i.e., teams and athletes), (4) purchasing advertising space at locations that are in close proximity to the event venue, (5) thematic advertising and implied allusion, (6) creation of a counter attraction, and (7) accidental ambush. It is also important to note, however, an additional category taken from Meenaghan (1994) entitled miscellaneous strategies. This category speaks to the difficulty researchers and those fighting against ambushers experience in attempting to cover all types of ambush marketing. The increasing diversity of platforms for communication and the creativity of marketers mean that new practices that could be classified as ambush marketing appear on such a frequent basis that an exhaustive list of such practices is nearly impossible. However, moving forward from Meenaghan (1994)

and Crompton's discussions of these broadly categorized forms of ambush marketing, there has been minimal further examination of the exact elements within these categories used to portray an association between the ambusher and the event. While Preuss et al. (2008) presented a general categorization of traits representing thematic Olympic advertising for the purposes of data collection and Kent and Campbell Jr. (2007) outlined a specific subset of ambush marketing they termed 'freeloading', such detailed categorizations have been taken no further.

While much literature in ambush marketing focuses on the above topics of defining and describing the practice (e.g., Crompton, 2004; Ettorre, 1993; Meenaghan, 1998; Payne, 1998; Tripodi & Sutherland 2000; Sandler & Shani, 1989), four other central research areas can also be identified, they are: consumer perception and response to ambush marketing, ethical issues, fighting and preventing ambush marketing, and legal issues. Research in each of these areas will be outlined below.

Consumer perception and response to ambush marketing.

Questions around consumer perception and response to ambush marketing have been among the most studied topics in ambush marketing research (e.g., Koenigstorfer & Groeppel-Klein, 2012; Lyberger & McCarthy, 2001; MacIntosh et al., 2012; Mazodier, Quester & Chandron, 2012; McKelvey & Gladden, 2006; Pitt, Parent, Berthon & Steyn, 2010; Quester, 1997; Sandler & Shani 1993; Séguin, Lyberger, O'Reilly, McCarthy, 2005; Shani & Sandler 1998) and there has recently been an attempt to look at the perception of athletes as well (McKelvey, Sandler & Snyder, 2012). That ambush marketing ultimately leads to consumer confusion and/or deception is a key claim made

by those opposed to the practice. For instance, it has been described by former International Olympic Committee (IOC) marketing director Michael Payne (1998) as ‘a deliberate attempt to deceive the consuming public’ (p. 325). While such claims for confusion and deception on the part of ambushers are extensive (McKelvey & Gladden, 2006), the actual perception of consumers is much less clear-cut. In examining the literature in this area, it becomes clear that this is an unresolved issue stemming from highly contradictory evidence that can be used to support either side of the argument (Crompton, 2004).

In general, it can be argued that much of the literature shows feelings of indifference by consumers towards the practice of ambush marketing (Lyberger & McCarthy, 2001; Moorman & Greenwell, 2005; Sandler & Shani, 1993; Shani & Sandler, 1998). Sandler and Shani (1993) and Shani and Sandler (1998) specifically noted apathy on the part of respondents towards ambush marketing. Lyberger and McCarthy (2001) reported similar findings in their research on the Super Bowl, showing largely nonchalant consumer attitudes towards ambushing. Their results indicated that while 54% thought it was unfair to mislead consumers, only 38% felt it was unethical, and even fewer, just 20%, were annoyed by the practice. In their study, Moorman and Greenwell (2005) specifically examined consumer perception of thematic advertising as a form of ambush marketing. Akin to the previously mentioned studies, their respondents did not feel such ads were dishonest, misleading, illegal, unique or unethical. In fact such campaigns were described as typical business practice with a clear distinction being drawn between the idea of suggestive advertising and deceptive advertising.

Conflictingly however, some of the same studies and others have also shown that in certain instances consumers may in fact perceive ambush marketing to be unacceptable (Moorman & Greenwell, 2005; Shani & Sandler 1998; Séguin, Lyberger, O'Reilly, McCarthy, 2005). In an international study covering three countries, Séguin et al, (2005) reported that respondents were “slightly opposed” (p. 224) to the practice of ambush marketing. They noted that respondents felt it was unfair for a company to pretend they were associated with the Olympic Games if they were not and they found the practice of ambush marketing generally unacceptable and unethical (Séguin et al., 2005). Also, the results of Shani and Sandler’s (1998) article, which was discussed above as demonstrating general apathy towards the use of ambush marketing, do show an instance where a more negative feeling towards the practice is expressed. They found respondents to be in strong agreement with the statement “non-sponsors should not lead consumers to believe that they are official sponsors of the Olympic Games” (p. 379). Finally Mazodier and Quester (2010) argued that when companies were exposed as an ambusher it had a negative impact on perceived integrity, affective response, and purchase intention.

A key notion to both sides of the argument around positive or negative consumer perception is the concept of confusion. While much of the literature demonstrates that sponsorship confusion relating to events such as the Olympic Games and the Super Bowl is widespread, the attribution of blame to ambush marketing practices is less straightforward. Séguin et al. (2005) found that consumers had general lack of awareness around the practice of ambush marketing. This is concerning for event organizers and official sponsors as even if consumers view ambush marketing in a negative way when asked about it, ambush marketing will continue unabated as long as consumers are

confused about what it is and therefore do not recognize it when they see it. In their study on the impact of ad recency and gender on consumer response to ambush marketing, McDaniel and Kinney (1998) revealed that consumer recall of advertising and sponsorship may be based more on recency of ad exposure than any other factor. This means that if the last ad they watched was that of an ambusher, they would be more likely to identify that organization as an official sponsor. They argued that “awareness of official sponsorships is fleeting, especially in a highly cluttered or ambush-prone event environment” (McDaniel & Kinney, 1998, p. 400), thus increasing the chance of consumer confusion in this area. Finally, multiple scholars recognized the biggest cause of event sponsorship confusion as general confusion around the rights and guidelines related to sponsorship categories. As each event produces its own hierarchal system of official sponsorship, partnership and licensing agreements, consumers are noted to be constantly confused or unaware about particulars such as how the system works, which rights are bestowed upon sponsors at each level, and exactly what corporations designated as an official sponsors are entitled to (Hoek & Gendall, 2002; Lyberger & McCarthy, 2001; Shani & Sandler, 1998; Séguin et al., 2005).

Ethical issues.

One of the most divisive debates surrounding the concept of ambush marketing is that of ethics (e.g., Crompton, 2004; Doust, 1997; Ettorre, 1993; Farrelly, Quester and Greyser, 2005; Meenaghan, 1994, 1996; O’Sullivan & Murphy, 1998; Schmitz, 2005; Séguin et al., 2005). This debate is heated and frequently contested (O’Sullivan & Murphy, 1998) between those who argue that ambush marketing is immoral and those who consider it an imaginative business practice (Meenaghan, 1994). Like the definition

of ambush marketing itself, it is noted that the ethics of ambush marketing are often considered through varying lenses based on the individual stakeholder's role in the outcome (Doust, 1997). Those who argue ambush marketing is unethical base their convictions on many factors. IOC member and Past President of the World Anti-doping Agency, Dick Pound explains the stance of the IOC by likening ambush marketing to stealing. He claims that the practice is unethical because ambusher has taken something that was not theirs for the taking (as cited in Ettorre, 1993). Séguin et al. (2005) found that in many cases consumer perceptions mirror those of the IOC. Their reasoning however seems to be based more on consumer truths with 58% of respondents (n = 2570) believing that organizations that were not official sponsors should not lead consumers to believe that they are. In contrast, another study by Farrelly, Quester and Greyser (2005) considered the opinions of a panel of experts who "did not consider the regular use of sport imagery by non-sponsors as blatant or unethical" (p. 341). Similarly Crompton (2004) argued, "competitors have no ethical obligation to make sure an official sponsor's investment is successful. The obligation lies with the sponsors and event owners to remove or minimize ambushing opportunities" (p. 11). Other authors have applied ethics theories to the debate in an attempt to come to a theoretical conclusion, but even using this method has led to contrasting opinions. O'Sullivan and Murphy (1998) applied four ethical theories to the concept of ambush marketing and were left with mixed results. The first theory they used was utilitarian theory that claims that the decision that brings the most good to the most people is the ethical decision. In the case of O'Sullivan and Murphy they state that ambush marketing may be seen as ethical "in the spirit of financial 'utilitarianism', as the greatest financial good is gained by offering multiple, even

competing, organizations an opportunity to sponsor some aspect of a sports event” (p. 359). However, using the same theory, it is argued by Meenaghan (1996) that ambush marketing is unethical since the ambusher is not thinking of the greater good of sport, but only of themselves when they engage in an ambush marketing campaign. The second theory applied by O’Sullivan and Murphy and others (Meenaghan, 1996) was stakeholder theory. At a very basic level this theory examines the impact of ambush marketing on all those who are, in some way, invested in the outcome. In relation to stakeholder theory, ambush marketing is most often portrayed as not only an ethical practice, but it is also suggested that in the best interests of stakeholders it might be seen as a required exercise (Meenaghan, 1996; Crompton, 2004). This point is argued by Crompton (2004) who states that “managers have a moral obligation to maximize returns to the stockholders for whom they work. Provided actions are lawful and in the company’s best long-term interests, they should be pursued” (pp. 10-11). The next ethical theory examined by O’Sullivan and Murphy was duty-based ethics. The premise of this theory is that the ethical nature of a situation is determined not by how the outcome impacts those involved, but rather by the intentions of the decision maker. In the case of ambush marketing if a competitor decided to run an ambush campaign as a way to intentionally hurt their rivals it would be considered unethical, on the other hand if their reasoning was based on doing what they felt was best for their organization it could be viewed as ethical. The difficulty with applying such a theory lies in determining the true reasoning behind an organization’s decision-making. Only the decision-maker knows the true reasons behind their choice and so only they would be able to evaluate the ethics of their situation. The final theory that has been applied to the ethical question of ambush

marketing is virtue ethics. This theory places more emphasis on how something will impact an individual or organization rather than on the ethics of the decision itself (O'Sullivan & Murphy, 1998). Accordingly, O'Sullivan and Murphy argue that in the case of ambush marketing that may seek to confuse and mislead consumers, a company who subscribes to virtue ethics would be unlikely to engage in the practice, as it would be seen as "counter-productive" to the objectives of the organization. The use of varying theories does not seem to aid the attempts to define ambush marketing as either an unethical or ethical practice.

Fighting ambush marketing.

The vast majority of literature on fighting ambush marketing involves descriptive outlines of practices that have either already been used with perceived success, or are suggested to aid sponsors and other stakeholders in fighting against ambush marketing. While no two studies list the exact same strategies, there is much overlap among those strategies suggested. The concept of managing is one that frequently appears. This applies to a variety of circumstances and elements of sponsorship relationships. Authors have suggested that in order to fight against ambush marketing, property owners need to manage such areas as the sporting venues themselves (e.g., Townley, Harrington and Couchman, 1998), sponsorship and broadcast structures (e.g., Burton & Chadwick, 2009; Crow & Hoek, 2003; Meenaghan, 1996; Séguin & O'Reilly, 2008), and stakeholder interests and involvement (e.g., Townley et al., 1998, Séguin & O'Reilly, 2008). Prevention is a second blanket concept that describes several strategies noted for fighting ambush marketing. Ensuring transparency in the drafting of sponsorship rights (Crow & Hoek, 2003; Hartland & Skinner, 2005), consumer and sponsor education programs (e.g.,

Crow & Hoek, 2003, Séguin & O'Reilly, 2008), and sponsorship recognition programs (e.g., Séguin & O'Reilly, 2008) are among the preventative strategies suggested in the literature. But, arguably most importantly, it is noted that sponsors must do their own jobs well and 'claim the space' (Séguin & O'Reilly, 2008). This refers to ensuring that they not rest on their laurels but activate their sponsorship strategically (Meenaghan, 1996; Séguin & O'Reilly, 2008), ensure full brand integration between their own brand and that of the property (Farrelly et al., 2005; Séguin & O'Reilly, 2008), and integrate the sponsorship within the full range of their marketing and communications mix (Hartland & Skinner, 2005; Séguin & O'Reilly, 2008). Another concept that covers several strategies for fighting ambush marketing is reacting. Reactive strategies include employing people as ambush police during the event to find and stop incidents of ambush marketing, and naming and shaming an ambusher in the public eye (Meenaghan, 1996). Although it is important at this point to note that Humphreys, Cornwell, McAlister, Kelly, Quinn, and Murray (2010) argued such public communications strategies for fighting ambush marketing may in fact have the opposite intended effect, whereby strengthening the consumer's memory of ambusher-event relationships. Lastly the ability of property owners to fall back on legal protection as a reaction to ambush marketing has become an ever present strategy in research and in practice. While the creation of such legislation is arguably proactive, it is also used in a reactionary way when its measures are enforced against an offending ambusher. Such protections take various forms from carefully drafted contracts to both general trade-mark protection and specific anti-ambush marketing legislation. Some form of legal protection, however, is typically a vital part of any fight against ambush marketing as outlined by various authors (Crow & Hoek, 2003;

McKelvey & Grady, 2008; Meenaghan, 1996; Séguin & O'Reilly, 2008; Townley et al., 1998). This will be discussed in more detail in the following section, as it is particularly relevant to this research study.

Legal issues.

For the most part, research in the area of legal aspect of ambush marketing can be divided into three areas: (1) descriptions of anti-ambush measures (e.g., Berger-Walliser et al., 2012; Bhattacharjee & Rao, 2006; Bean, 1995; Crow & Hoek, 2003; Hoek & Gendall, 2002; McKelvey, 2003; Moorman & Greenwell, 2005; Palomba, 2011; Wall, 2002); (2) discussions on the effectiveness of such measures (e.g., McKelvey & Grady, 2008; Kendall & Curthoys, 2001) and; (3) impacts, issues and critiques (e.g., Ellis, Gauthier & Séguin, 2011a; Ellis et al., 2011b; Grady, McKelvey & Bernthal, 2010; Misener, 2002/2003; Scassa, 2011; Schmitz, 2005).

Within the descriptions of anti-ambush measures, articles cover both descriptions of various anti-ambush laws in multiple countries (e.g., Berger-Walliser et al., 2012; Bhattacharjee & Rao, 2006; McKelvey & Grady 2004) and those specific to one country, including the USA (e.g., Bean, 1995) and Great Britain (e.g., Palomba, 2011). Other studies which provide descriptions of anti-ambush measures tend to look more generally at how other applicable legal frameworks, for instance the laws of 'passing off' and unfair competition, are relevant in the fight against ambush marketing (e.g., Hoek & Gendall, 2002; McKelvey, 2003; Moorman & Greenwell, 2006).

The effectiveness of legal measures in fighting ambush marketing is the second area that has received some scholarly attention (e.g., Ellis et al., 2011b; Kendall &

Curthoys, 2001; McKelvey & Grady, 2008). McKelvey and Grady for instance, evaluated various legal remedies as one aspect of larger sponsorship protection programs when examining the effectiveness of event organizers in protecting their sponsors. As a result of their examination they suggested that organizers should be cautious in accepting legal strategies as the ultimate solution to ambush marketing as there are many variables (i.e., judicial understanding, nature of the event, interpretations of commercial pragmatism, and potential negative backlash) that will impact the effectiveness of such measures.

The third and final area of research evident in literature on legal aspects of ambush marketing looks at issues, impacts and critiques related to legal strategies for brand protection. For example, Ellis et al. (2011a) specifically examined how one stakeholder, Canadian NSOs, view and are impacted by anti-ambush marketing legislations. They also called for more research in this area to continue examining the perspectives of other Olympic stakeholders. From a broader, critical perspective Grady et al. (2010) examined how the rights and interests of stakeholders are considered with regards to the legal framework of ambush marketing protections and its intersection between public policy and marketing rights. They argued that such measures require a delicate balancing act to ensure the rights of all public parties are respected in attempts to meet the needs and requirements of OCOGs, the IOC and sponsors, but that this is not currently the case, particularly with regards to the aforementioned ‘right of association’. Similarly, Ellis et al. (2011b) questioned the placing of ambush marketing in a legal framework for protection when business measures seem to provide a more comprehensive, albeit perhaps more resource intensive, option. Nevertheless, the move

towards legislated sponsor protection within the Olympic Movement has been swift and is outlined briefly below.

Olympic anti-ambush marketing legislation.

Legislation has recently emerged as a required aspect of all OCOG sponsorship protection programs. As early as the bid process, potential host cities are now required to provide a written guarantee from themselves and their government that legislation specifically covering ambush marketing will be passed in the event of their being chosen to host the Games. While protection of Olympic marks is not a new concept, as discussed below, it is the specific protection against the ambush marketing practices which differentiates current forms of legal protection.

Despite the 1981 enactment of the *Nairobi Treaty on the Protection of the Olympic Symbol* by the World Intellectual Property Organization the task of protecting Olympic intellectual property falls to NOCs. In fact while the *Nairobi Treaty* was created in the hopes of securing some level of worldwide protection, it holds no authority unless ratified and, in some cases, implemented in each individual country; and only 50 countries have done so, none of whom represent major commercial markets for Olympic marketing. On the other hand, it is the responsibility of all NOCs to ensure that the Olympic marks are protected under their national trade-mark laws to the best of their ability. In Canada, the Olympic symbols have long been afforded special status as 'Official Marks'. Such recognition is given to organizations that meet a set of three criteria to demonstrate they are a 'public authority'. The organization must perform public duties, for public benefit (not profit), and under significant government control (Corbett, Findlay, & Lech, 2008). Once an organization has been recognized as a public

authority they can attain protection for their name and logos as official marks. This offers benefits such as: no procedures for opposition, it is not possible for two organizations to use the same official mark for different services (unlike trade-marks), and they do not have to specify what wares or services will be associated with the marks (Corbett et al., 2008). In addition to general trade-mark protection for Olympic marks, those countries hosting the Olympic Games are also responsible for securing protection of the Games specific symbols. The Sydney Games of 2000 are often noted as being the first Olympic Games to include specific protection aimed at targeting ambushers, rather than just those illegally using Games symbols. Since that time, there has been a rapid increase in the number of legislations and amendments dealing with ambush marketing protection in various recent and future host countries². Most recently, what has been termed a ‘right of association’ such as the London Olympic Association Right (LOAR) has emerged as the newest form of legislated measures. This continues to broaden those ambush practices that are being covered with legislation by outlawing ever more abstract connections to the Olympic Games rather than just words and symbols. It should be noted, however, that such measures are not without their critics (e.g., Palomba, 2011; Scassa, 2011); and this research seeks to continue looking at these issues alongside the overall evolution of such measures within the Olympic movement.

² For example: *Sydney 2000 Games (Indicia and Images) Protection Act 1996*; *Sydney 2000 Games (Indicia and Images) Protection Amendment Act 1997*; *Ted Stevens Olympic and Amateur Sports Act 1998*; *Protection of Olympic Symbols and Signs Law 2598/1998*; *Italian State Law 167/05*; *Protection of Olympic Symbols Regulations*; *The Olympic and Paralympic Marks Act 2007*; *London Olympic Games and Paralympic Games Act 2006*; *Federal Law No. 310-FZ: On the Organization and Holding of the XXII Olympic Winter Games and the XI Paralympic Winter Games 2014 in Sochi* (Stuart & Scassa, 2011).

As noted earlier, while the topic of ambush marketing has grown as a field of study over the last 25 years, the above review of literature shows that it is still a highly descriptive field that lacks a clear theoretical direction. It is with this understanding that this dissertation seeks to contribute to advancing the field, beginning with the application of the theoretical and conceptual framework described in the next chapter.

Chapter 3: Theoretical and Conceptual Framework

One of the stated goals of this research project was to increase the use of theory in relation to the study of ambush marketing. With this in mind, it is important to begin by outlining what is meant by theory and to discuss those theories, concepts and perspectives which have been used as a lens for this dissertation: institutional theory, the network concept, and the legal perspective.

Theory

Within qualitative research, the role of theory is two-fold. Theory can provide both the lens that guides the direction of the study, such as taking a network approach, or it may represent the end product of a qualitative study, as is the case in grounded theory building (Creswell, 2003). Individuals who claim to use or develop theory must articulate their own understanding of the concept. While theory is often described as “a statement of relations among concepts within a set of boundary assumptions and constraints” (Bacharach, 1989, p. 496), Bacharach stated that this covers only the explanation of phenomena. This dissertation, however, follows the understanding of Whetten (1989), who identified theory as both describing and explaining phenomena. To accomplish this, theory is argued, for the purpose of this dissertation, to consist of three fundamental elements and five related researcher questions. First is the *domain* or *subject* that provides a description by asking the questions ‘what’ and ‘how’. The ‘what’ question outlines the set of factors that should be considered in explaining the phenomenon under study, while the ‘how’ question examines how these identified factors are related (Whetten, 1989). Second are the *assumptions* that offer explanations by asking the question ‘why’. The addition of the ‘why’ question seeks to discover the “underlying psychological,

economic, or social dynamics that justify the selection of factors (i.e., *what*) and the proposed causal relationships (i.e., *how*)” (Whetten, 1989, p. 491, emphasis added), thereby incorporating Bacharach’s description of theory. Finally, the third is the *context* and *boundaries* that are discovered by asking ‘who’, ‘when’, and ‘where’. The importance of these questions lies in their ability to describe the theory’s capacity for representativeness and in placing limitations on the propositions to be generated from the theory (Whetten, 1989).

Dubin (1978) argued that within the social and behavioural sciences, theory seeks to attain the separate but compatible goals of understanding and predicting social phenomenon. Expanding upon this, he asserts that the focus of *prediction* is on *outcomes* while the focus of *understanding* is on *interactions* (emphasis in original). While these two goals are compatible, they can be, and often are, accomplished separately (Dubin, 1978). With this in mind, this dissertation focuses on gaining an understanding of interactions rather than predicting outcomes.

Institutional Theory

The key to institutional theory is its focus on elements within the external environment and their impact upon an organization. Institutional theory outlines the process of institutionalization in relation to an organization with institutionalization being defined as “the processes by which social processes, obligations, or actualities come to take on a rule like status in social thought and action” (Meyer & Rowan, 1977, p. 341). The basis of institutional theory is that organizations will adopt practices and structures based on social expectations of specific norms, beliefs, and values within their external organizational field. However, ironically, Tolbert and Zucker (1996) noted that within

institutional theory, there is very little institutionalization. That is, there are no widely accepted definitions, concepts, measures, or methods, but rather numerous interpretations. With such divergence over the topic, it is important to outline the understanding of the subject that informed its use in this dissertation.

While institutional theorists see an organization as adapting its structure, processes, and procedures in order to meet the expectations of its external environment, an institutionalized organization is at the same time constrained and conformed by its external environment; and the success and/or survival of the organization depends on its ability to meet these social expectations and prove its social worthiness (Oliver, 1991). In an effort to gain legitimacy, an institutionalized organization typically follows the widely accepted social norms, values, and beliefs that define the given organizational field, regardless of internal differences. The parameters that institutionalize an organizational field are often the product of numerous external sources such as the public, academia, the law, social prestige, and other stakeholder interests (Meyer & Rowan, 1977).

Once an organizational field has been institutionalized, the inevitable result is isomorphism, which can also be called homogenization. DiMaggio and Powell (1983) noted that isomorphism might be seen as both a process and a state. As a process, organizational isomorphism is defined by DiMaggio and Powell (1983) as “a constraining process that forces one unit in a population to resemble other units that face the same set of environmental conditions” (p. 149). As a state, isomorphism is defined by Deephouse (1996) as “the resemblance of a focal organization to other organizations in its environment” (p. 1024). Isomorphic organizations can be homogenous in terms of

their structure, practices, strategies (Deephouse, 1996), and/or organizational vocabulary (Meyer & Rowan, 1977).

In a similar vein to isomorphism, Deephouse (1996) argued that legitimacy is both a state and a process. While all organizations seek to gain legitimacy, only specific actors within a given external environment are able to bestow legitimacy upon an organization. These actors can include the media, the government through legislation, and the public (Deephouse, 1996; Meyer & Rowan, 1977). The institutionalization of organizations is brought about by the belief that isomorphism ultimately leads to legitimacy. Deephouse (1996) concurs and argues “evidence suggests a positive relationship between strategic isomorphism and multiple measures of legitimacy, even when age, size and performance are included” (p. 1033). There are those who possess power and are thereby able to confer legitimacy, or there are those who have amassed enough power to go against the grain and buck the institutionalization of their organizational field and either succeed by being different or start a new ‘trend’ of institutionalization (Scherer & Lee, 2002). It is therefore argued that power is a concept that is deeply intertwined with many aspects of institutional theory (e.g., Lawrence, 2010).

Processes of institutionalization.

The seminal work generating theoretical discussion of the process of institutionalization comes from Tolbert and Zucker (1996). Their model identifies three stages in the institutionalization process: the pre-institutionalized stage, the semi-institutionalized stage and the fully institutionalized stage. The development of a practice from one stage of institutionalization to the next corresponds with its movement through

a series of sequential processes, starting with the processes of innovation and habitualization, moving to the process of objectification, and finally progressing through the process of sedimentation. Finally, it is noted that in moving through these processes towards institutionalization, there several key causal forces that must be considered. The three components of Tolbert and Zucker's process of institutionalization (the stages, processes and causal forces) and their interactions, will be discussed in more detail in the rest of this section.

Pre-institutionalization stage.

The processes of innovation and habitualization correspond to the pre-institutionalization phase. In moving through these first two processes, a practice or structure is set on the path towards institutionalization. Tolbert and Zucker argue that innovation is typically the result of an organization reacting to an emergent problem created by causal factors such as technological changes, legislation or market forces. Habitualization is a continuation of this practice as a way to solve a recurring problem. It might also involve imitation of the practice by other organizations, typically those who are similar in structure and circumstance to the innovating organization. However, at this stage, the way in which the practice is understood and approached in each of these organizations may vary significantly as it is independently implemented with little centralized understanding of its true value (Tolbert & Zucker, 1996). Furthermore, there is a high rate of failure for practices at this stage; relatively few will go on to the next stage of institutionalization.

Semi-institutionalization.

According to Tolbert and Zucker (1996), the movement of a practice from the stage of pre-institutionalization to semi-institutionalization is facilitated by inter-organization monitoring and theorization, and is evident in the process of objectification of the practice. Objectification is the process by which a practice becomes more widespread and permanent among organizations in a specific field as a result of growing agreement about the value of that practice; however, there is yet to be a fully normative base for its diffusion (Tolbert & Zucker, 1996). Although at this stage there is increasing diversity with regard to the structures and characteristics of the organizations that adopt the practice, there is a declining variance in the manner in which the practice is implemented within these organizations. It is important to note that the semi-institutionalization of a practice is not a guarantee of its long-term survival. At this stage, the independent verification of its value in each organization, rather than a quest for legitimacy in spite of effectiveness and efficiency, will continue to determine its survival (Tolbert & Zucker, 1996).

Tolbert and Zucker (1996) suggest that the basis of objectification, the facilitation of an increased consensus about the value of a practice, is aided specifically by the causal factors of inter-organization monitoring and theorization. Inter-organization monitoring refers to the tendency of organizations to monitor the actions of their competitors in order to establish the practices and/or structures they should adopt to maintain competitive advantage (Tolbert & Zucker, 1996). Rather than dealing with the risks of innovation, this offers organizations a chance to implement pre-tested practices based on the successes of other organizations. Theorization refers to ability of a “champion” to clearly

define the problem at hand and offer justifications for the current practice as a logical solution (Tolbert & Zucker, 1996). Through inter-organization monitoring and theorization, the practice is given a greater chance of being adopted by organizations outside of those directly connected to innovators; and as a result, the objectification of that practice is more likely.

Full institutionalization.

A practice can be said to be fully institutionalized when it has achieved a level of exteriority, that is, when a practice or structure comes to possess its own reality within a field, and that reality is understood by decisions-makers as incontrovertible fact (Berger & Luckman, 1967; Tolbert & Zucker, 1996). In order to achieve exteriority, a practice must go through sedimentation, the final process in Tolbert and Zucker's model. Sedimentation refers to the process by which a practice comes to acquire both width (complete diffusion of the practice) and depth (survival of the practice across many generations) within a field, as the motivation for diffusion of the practice has developed a normative base. At this stage, the practice has come to be entirely diffused throughout the field and thereby throughout a heterogeneous group of organizations. These organizations implement the practice with little variation in strategy, and there is a low failure rate for practices that reach this stage (Tolbert & Zucker, 1996).

Like the previous stages, the move to full institutionalization of a practice through the sedimentation process is subject to causal factors that influence the diffusion (width) and retention (depth) of that practice (Tolbert & Zucker, 1996). To begin, the greater the ability of a practice to demonstrate identifiable positive outcomes towards solving the

associated problem, the more likely it is to achieve full institutionalization. Furthermore, promotion of the practice by advocacy groups is argued to positively shape the ability of the practice to achieve exteriority through sedimentation. On the other hand, active resistance to the practice by other interest groups is suggested to lessen the chances of diffusion and retention and therefore sedimentation and institutionalization (Tolbert & Zucker, 1996).

The use of institutional theory in sport management has gathered pace in recent years (e.g., Kikulis, 2000; Phelps & Kent, 2010; O'Brien & Slack, 1999; Skille, 2011; Washington, 2004; Washington & Ventresca, 2008); but to date, its interaction with both the Olympic Movement generally and Olympic sponsorship specifically has not been fully examined. Using Tolbert and Zucker's (1996) framework, this dissertation seeks to take a first step towards integrating the concept with the study of marketing within the Olympic Games.

Network Concept

Knoke and Yang (2008) described a network as “a structure composed of a set of actors, some of whose members are connected by a set of one or more relations” (p. 8). In this understanding an actor is an individual or an organization (formal or informal), and a relation is a directed or non-directed tie, link, or connection. A seminal article on the development of network theory is the article by Rowley (1997) entitled, *Moving Beyond Dyadic ties: A Network theory of Stakeholder influences*. In this article, he describes network theory as a ‘handmaiden theory’ because of its propensity to be used to “support

the elaboration of other theories...but rarely [is it] the focus of its own development” (p. 888). He states: “the purpose of a network analysis is to examine relational systems in which actors dwell and to determine how the nature of relationship structures impacts behaviours” (pp. 893-894). One key for this dissertation is Rowley’s discussion of the idea that network analysis may offer an alternative to resource dependence theory as a way to determine sources of power or influence. He argues that network analysis “examines structural constraints and opportunities for accessing other players as another source of power” (p. 907). The main arguments around this are that the density of a stakeholder network and an organization’s centrality within that network will have an impact on the power or influence of that organization. For informational purposes, Rowley describes density as: “a characteristic of the whole network which measures the number of ties in the network; it measures the relative number of ties in the network that link actors together” (p. 896). Centrality is defined as: “an individual actor’s position in the network relative to others” (Rowley, 1997, p. 898). The concept of centrality can be further broken down into degree, closeness, and betweenness centrality. Degree centrality refers to: “the number of ties he or she has with other actors in the network” (Rowley, 1997, p. 899). Closeness centrality can be defined as: “an actor’s ability to access independently all other members of the network” (Rowley, 1997, p. 899). Finally, betweenness centrality “measures the frequency with which an actor falls on the geodesic paths between pairs of other actors” (Rowley, 1997, p. 899). More information on network theory is provided in Table 3-1 that outlines its basic principles and assumptions. While previous studies in sport have used network theory (e.g., Erickson & Kushner, 1999; Olkkonen, 2001; Cousens & Slack, 1996), or examined sport event networks

generally (e.g., Shonk & Bravo, 2010). Work remains to be done, and there have been continued calls (e.g., Quatman & Chelladurai, 2008a) to increase its use given the numerous interesting networks present in the field of sport management and marketing that might benefit from closer examination.

TABLE 3-1: Basic Principles and Assumptions of Network Theory

Principles	Assumptions
Behaviour is interpreted in terms of actual structural constraints on activity rather than in terms of inner forces within units.	Actors and their actions are viewed as interdependent rather than independent autonomous units.
Analysis should focus on relations between units.	Relational ties (linkages) between actors are channels for transfer or 'flow' of resources (either material or non-material).
A central consideration is how the pattern of relationships among multiple actors jointly affects network members' behaviour.	Network models conceptualize structure (social, economic, political and so forth) as lasting patterns of relations among actors.
Analytical methods deal directly with the patterned relational nature of social structure.	Observed behaviours can be further understood through an examination of structural relations.
Network analysts seek to uncover sets of theoretical mechanisms by which social relations affect social entities and to identify the conditions under which specific mechanisms operate.	Social networks affect perceptions, beliefs, and actions through a variety of social mechanisms that are socially constructed by relations among entities.
Structural relationships should be viewed as continually changing through interactions among people, groups and/or organizations.	

(Adapted from Knoke & Yang, 2008; Rowley 1997; Wasserman & Faust, 1994; Wellman, 1988)

Legal Perspective

The law is an extremely complex entity to attempt to review; but for the purposes of this research, it is important to offer a basic understanding of fundamentals, such as the purpose of law and the process of creating legislation. Laws can be equated with rules that have been put in place by a central authority to which citizens, be they individuals, groups or organizations, have a duty to adhere; and if they fail to do so, they will pay a penalty (Chapman, 1965). In Canada, all citizens live within a framework of governmental laws. It is a system of rules and regulations outlining their full duties and rights, and the means by which they are able to ensure the protection and maintenance of their rights (Chapman, 1965). While there can be numerous identified reasons for the creation of laws, Sussmann (1976) provided a basic understanding of the purpose of law in stating that “first and foremost [the purpose of law is] to maintain the order necessary for social life – to preserve that order without which any organized society [...] would break down” (p. 3).

Lawmakers in Canada serve two core functions: first, they create statutes to form new laws, and second, they create statutes to amend existing laws. The creation of a new law in Canada entails specific steps which Sussmann (1976) briefly outlined as follows: a proposed law, also called a Bill, is brought before the legislature by either a member of government who is a member of parliament, or in some cases, a member who may not be a member of the government. When it is first brought before parliament, the Bill is considered, questioned, and perhaps modified through rounds of discussion. It is passed into an act when, and if, it can be agreed upon by a majority of members in parliament. Following this, for federal laws, the Governor General must provide royal assent. Upon

achieving royal assent, some laws become effective immediately, while others become effective for a set time period or only when ‘proclaimed’ by the government (Sussmann, 1976). While the subject matter, which can act as an impetus for new legislation, is broad and almost unlimited, such things as public pressure, events of the day, federal-provincial relations and international agreements are examples of prominent sources of pressure for the creation of new legislation (Sussmann, 1976). It should also be noted however that Canada is a common law country, this means in addition to the process described above, laws can be created and will develop over time as judges decide different cases. Very generally Corbett et al. (2008) describe this process as follows “as new fact situations arise and new cases are decided, the existing principles are broadened, exceptions are developed, and the case law is expanded” (p. 2). For discussions of ambush marketing in particular this is relevant as it applies to associated torts such as ‘passing off’ which will be described later in this section.

The element of Canadian law that is of interest for this study is the area of intellectual property rights, and in particular, trade-mark law. Section 2 of the *Trade-marks Act* defines a trade-mark as: “a mark that is used by a person for the purpose of distinguishing or so as to distinguish wares or services manufactured, sold, leased, hired or performed by him from those manufactured, sold, leased, hired or performed by others” (1985, ¶ 7). A trade-mark can be a word, a grouping of words, initials, numbers, designs, and even sounds or a combination of these things (Hagen et al., 2013). There are several goals of trade-mark law. From a consumer protection perspective trade-mark law seeks to ensure that consumers are not confused as to the source of a product or service, while also helping to protect them from being misled as to the quality of the goods or

services they may be purchasing (Hagen et al., 2013). Alternatively, from the perspective of the trade-mark owner, trade-mark law protects the goodwill built by a company towards their trade-mark from the potential for weakening of the link in consumer minds between their product and the marks and/or the potential for products of a lower quality to damage the good reputation associated with their marks (Hagen et al., 2013).

When examining the Olympic trade-marks, the concept of official marks is also pivotal. The Canadian Olympic Committee (COC) was found to be a ‘public authority’ in 1981 (*Canadian Olympic Assoc. v. Canada*, 1981); and as such, public notice was given of the status of Olympic trade-marks as ‘official marks’. This special status has numerous advantages including no opposition to the adoption of the marks, no expiry on their protection, and the adoption of marks even if they are already in use by someone else at the time (Vaver, 2011).

Finally, in addition to the *Trade-marks Act*, elements of unfair competition are also dealt elsewhere such as under the *Competition Act*, the *Criminal Code* and provincial tort law. Tort law refers to an area of private law, where the plaintiff initiates legal action and may be awarded direct compensation (The Canadian Encyclopaedia, 2009). In the context of anti-ambush marketing legislation, one of the most significant elements of unfair competition covered by both tort law and the *Trade-marks Act* is ‘passing off.’ Passing off is described as “a cause of action which arises where there is consumer deception as to the *source* of wares or services” (Scassa, 2008, p. 52, emphasis added). In the past, passing off has been used to argue specifically against the practice of ambush marketing but with little success (e.g., *National Hockey League v. Pepsi Cola Canada*,

1992). This is arguably because a ‘right of association’ is not something that can be recognized as either a tort such as passing off or under trade-mark law.

Link between theoretical framework, objectives and purpose

Each of the theories and concepts discussed in the theoretical framework are used as a lens within the three studies of this dissertation. Institutional theory is the overarching theory that guides the three studies, while network theory contributes to meeting the objectives of the Study II, and the legal perspective is used to provide direction with regards to the objectives of Study III. In answering the objectives of these three studies, the researcher has sought to meet the greater purpose of the dissertation: to present an integrated conceptual framework for ambush marketing in the Olympic Games. Table 3-2 outlines how the research questions, theories, and concepts identified in the methodology might be used to determine the various aspects of theory, that is the what, who, how, when, where and why, of ambush marketing.

TABLE 3-2: Theory

Theoretical element	Aspect of Theory	Description	Explanation (theory/concept/variable)
Domain or subject	What	Set of factors considered in explaining the phenomenon under study.	• Terms related to growth of Olympic sponsorship • Terms related to growth of ambush marketing • Network relationships that show relevancy • Network structures that are evident • Key knowledge transfer tools. • Challenges and issues faced by Olympics transfer of knowledge programs • Potential marketing implications of anti-ambush marketing legislation • Potential legal implications of anti-ambush legislation
	How	Examines how identified factors explaining the phenomenon are related.	• Links between the evolution of ambush marketing legislation and the processes of institutionalization • Links between stakeholder control and influence and institutionalization • Links between knowledge transfer and to the process of institutionalization • Continued evolution of Olympic anti-ambush marketing legislation • Impact of institutionalization on current practices and global isomorphism within OCOGs • Impact of the evolution of legislation institutionalization on the mega-event field

Assumptions	Why	Underlying psychological, economic, or social dynamics that justify the selection of factors and the proposed causal relationships.	• Reasons for ambush marketing's evolution to its current point • Reasons for stakeholder power/control/influence • Importance of these stakeholder relationships for understanding the evolution of ambush marketing legislation • Importance of the institutionalization of legislation for examining the future evolution of ambush marketing
Context and boundaries	Who	People and/or organizations affected by or affecting the studied phenomenon.	• Stakeholders who affected change and institutional processes • Key ambush marketing network stakeholders • Key influencers • Additional stakeholders who may play a role in the continued evolution of ambush marketing
	When	The time period affected by or affecting the discussed aspects of phenomenon.	• Time period over which the described evolution of modern Olympic marketing takes place and ambush marketing has taken place • Time period over which the described institutionalization of ambush marketing legislation taken place • Beginning of formal transfer of knowledge programs in the Olympic movement
	Where	The countries affected by or affecting the discussed aspects of phenomenon.	• Countries who could be most affected by the continuing evolution of ambush marketing

Chapter 4: Methodology

The following section outlines the research design, case settings, and methods- including data collection and analysis techniques, used for this dissertation. In addition, a discussion of how research quality has been ensured is also included.

Research Design

Case studies.

Study I and II used a holistic multi-case study design (Yin, 2013). Gratton and Jones (2004) stated that case studies are “based upon the argument that understanding human activity requires analysis of both its development over time, and the environment and context within which the activity occurs” (p. 97). A key aspect of the case studies highly emphasized by researchers is its unrivalled ability to examine naturally occurring phenomena within its own setting as opposed to an artificial state (Denscombe, 2007; Eisenhardt & Graebner, 2007; Yin, 2013). Case studies are recognized as providing researchers with the ability to answer the ‘how’ and ‘why’ questions to provide both understanding and explanation for complex social and organizational phenomena (Yin, 2013), which have been outlined above as important in the definition of theory. In addition, by offering multiple options for sources of data (e.g., archival material and interviews) and various perspectives, a multiple case study method offers advantages to enhance the trustworthiness of the conclusions (Eisenhardt & Graebner, 2007). The approach to these case studies is also historical in that it “attempt[s] to systematically recapture the complex nuances, the people, meanings, events and even ideas of the past that have influenced and shaped the present” (Berg, 2001, p. 210-211).

Study III involved a single, contemporary holistic case study design examining the Vancouver 2010 Olympic and Paralympic Winter Games. The period of data collection for this study partially took place during the 2010 Vancouver Olympic and Paralympic Winter Games offering the researcher direct experience with the phenomenon and a rare and unique opportunity to examine the realities of ambush marketing during an Olympic Games. Each of the individual Olympic Games that provided a case setting for this dissertation is outlined in the next section.

Case study settings³.

Selection.

Each case study setting was selected for its importance/significance in the evolution of Olympic sponsorship and ambush marketing during a critical stage of growth. This dissertation explicitly examines those Games from Montréal 1976 to Vancouver 2010 that have made a major contribution or provided a turning point in the history of modern Olympic sponsorship and ambush marketing. While the concept of Olympic marketing certainly did not begin with the Montréal Games of 1976, this was chosen as a starting point for the dissertation because the financial fall-out, which resulted from these Games, is often seen as critical in heralding a new era of Olympic sponsorship, similar to the impact of television in relation to the more general concept of commercialization (O'Reilly & Séguin, 2009). Following the financial disaster of Montréal, Los Angeles was the only city to bid for the 1984 Games, but then went on to

³ Some additional information on the Olympic Games discussed in these case settings (1976-2002) can be found in the following references: Chappelet, (2002); Gold & Gold, (2007b); Payne, (2006); Pound, (2004); Preuss, (2004); Séguin & O'Reilly, (2009); Toohey & Veal, (2007).

prove to the world that the Games did not need to be a drain on financial resources of the host city and/or country. The Los Angeles Olympic Organizing Committee (LAOOC) implemented a new program of Olympic sponsorship that later influenced the creation of the IOC's TOP sponsorship program that is still used today. The Calgary Olympic Games of 1988 also provided a pivotal moment for modern Olympic marketing with the negotiation of unprecedented broadcasting fees, the incorporation and management of the Olympic Torch relay as a sponsorship property and the launch of the first cycle of the TOP sponsorship programme. The 1996 Games in Atlanta were nicknamed the 'Coca-Cola' Games as a relentless over-commercialization of the Games ensured that they were remembered more for the sponsorship and commercial issues than the athletic competition. The 2002 Salt Lake City Games were embroiled in scandal that resulted from the disclosure of information that IOC bid committee members had been accepting gifts in exchange for votes. This led to a brand crisis, testing both the capacity for Olympic sponsors and consumers to see the positive elements of the Olympic movement despite the exposed corruption, and Olympic brand managers' ability to protect their property. Finally, Vancouver 2010 provides an example of a move towards over-protection with the enactment of anti-ambush marketing legislation as an implicit requirement of the bid process. Each of these settings is discussed in more detail below.

Montréal 1976 Summer Olympic Games.

With his statement that "the Games could no more have a deficit than a man could have a baby" (as cited in Ludwig, 1999, p.164), Montréal's Mayor Jean Drapeau demonstrated a naïve understanding of the size of the task involved in hosting the Olympic Games, and provided a quote which would still be repeated with incredulity

over 35 years later. In the years leading up to the Games, the metropolitan population was more than 2.7 million (Ville de Montréal, 2007); and until 1976, Montréal was the largest city in Canada before it was surpassed by Toronto. Montréal was awarded the 1976 Summer Olympic Games in 1970. The Games took place from July 17 to August 1, 1976 and involved 92 nations and 6,084 athletes (IOC, 2009a). Having previously failed in a bid to host the Games in 1972, the city defeated both Los Angeles and Moscow in being awarded the hosting rights.

The original estimate of the cost to host the Games cited a figure of \$120 million. By the time the Games occurred, the actual cost had been inflated to \$1.6 billion. By the time it was paid off in 2006, this resulted in a \$1 billion deficit for the taxpayers of Montréal (Toohey & Veal, 2007). At this point, the use of sponsorship as a major source of revenue to finance the Olympic Games was in its relative infancy; and for Montréal, a ‘more the merrier’ approach was adopted with 42 official sponsors and 628 sponsoring companies in total being granted access to associate themselves in some capacity with the Games. However, despite the large numbers, sponsorship only generated \$5 million in cash and \$12 million in-kind, which represented just 2% of the receipts for the Games (Payne, 2006). Yet, this was far from the only problem. An official inquiry sought to investigate the city and the organizing committee for corruption in relation to the excessive cost. The inquiry report provided many reasons, including: (1) the Mayor and OCOG used the Games as a way to consolidate their own political power and showcase the city of Montréal despite all costs; (2) hold-ups with federal funding meant that construction projects were behind schedule and workers were eventually paid double, and sometimes triple, overtime in order to have the venues complete on time; and (3) many

contracts were awarded without the standard bidding process (Toohey & Veal, 2007). In addition, the decision of the Mayor not to tie the Canadian Government into a financial commitment as a way to gain their support for the bid, as well as the insistence that the successful hosting of Expo 67 was the only proof needed of Montréal's ability to host the Olympic Games, may have also contributed to the disaster (Latouche, 2007). Despite the inquiry and what is perceived to be common knowledge, the actual deficit from Games-related costs in Montréal is still being debated (e.g., Preuss, 2004). Nevertheless, as Michael Payne (2006) noted, the Montréal Games "cast a shadow that remained over the Olympics for decades" (p. 9). The experiences of Montréal made cities wary of hosting the world's largest sporting event; and when the time came to choose a host for the 1984 Games, only one city stepped forward to take up the challenge of reviving the financial reputation of the Olympic Games.

Los Angeles 1984 Summer Olympic Games.

At the time of the 1984 Games, Los Angeles was the second biggest city in the United States with a metropolitan population of 7.96 million (Target Science, 2000). Having previously hosted the Olympic Games in 1932, but having failed in bids for the 1976 and 1980 Games, Los Angeles was announced as host of the 1984 Summer Olympic Games by the IOC in May 1978. The Games took place between July 28th and August 12, 1984 with the involvement of 140 nations and more than 6,800 athletes (IOC, 2009b).

After the financial disaster of Montréal, Los Angeles officials organized what was termed the first "private enterprise Games" (Toohey & Veal, 2007, p. 270) in order to

relieve the government and taxpayers of any financial burden should the Games follow a similar path to those in Montréal. In the end, it was reported that Los Angeles not only avoided the taxpayer debt of Montréal but actually experienced a financial surplus of \$225 million (Toohey & Veal, 2007). Gold and Gold (2007) partially attributed the surplus to four main factors that were imperative in reducing expenditures: (1) the use of large numbers of volunteers at all levels of the organization's hierarchy; (2) the use of mostly pre-existing facilities; (3) the selling of corporate sponsorship and naming rights for the four new buildings that were completed; and (4) using university campuses as the athletes' villages. While the Games were certainly not without their issues, the overall ability of the organizers to manage the needs of the Games within the financial realities of the city and its citizens through the introduction of a balanced, organized, and innovative system of raising private funding dramatically altered the way Games were to be hosted in the future. Gruneau (1984) explained, "the 1984 Games are best understood as a more fully developed expression of the incorporation of sporting practice into the ever-expanding marketplace of international capitalism" (p. 2). The perceived success of the Los Angeles Olympic Games, both as an athletic contest and as a platform for global exposure, re-ignited interest in hosting the Olympic Games and provided a framework for future Games in two ways. The first was as a catalyst for the IOC to develop and implement an integrated worldwide sponsorship program (TOP) to ensure substantial sponsorship revenues for host cities, as well as recognizing and increasing the value of the Olympic Brand. The second was that is served as a framework for the organization of the Games in a way that is described by Gold and Gold (2007a) as "adding fine-tuned

commercialism to cost-consciousness” (p. 38). Los Angeles acted as the ultimate template for all Games that were organized following 1984.

Another pertinent feature of the 1984 Games was the increasing prevalence of ambush marketing, with the most famous case being Kodak versus Fuji (Sandler & Shani, 1989). The creation of increased value for the Olympic brand amplified the stakes involved in official sponsorship: non-sponsors began to see creativity as their only limit in creating an association with the Games, while official sponsors became more aware and concerned about the potential damage of such tactics towards their investment. It put rival businesses at odds over Olympic associations even after the official rights had been allocated, and was only the beginning of a phenomenon that would quickly become deeply entrenched in Olympic marketing.

Calgary 1988 Olympic Winter Games.

Calgary, Alberta, Canada hosted the 1988 Winter Olympic Games after being awarded the Games on September 30, 1981 at the IOC session in Baden Baden. Having previously failed with bids in 1964, 1968 and 1972, Calgary beat out competition from Falun, Sweden and Cortina d’Ampezzo for the rights to host the Winter Games in 1988. When the Games came to town, Calgary had a population of 657,118 (The City of Calgary, 1997). Taking place from February 13, 1988 until February 28, 1988 the Calgary Winter Games marked the extension of the festival to 16 days. In 1984 in Sarajevo, the Games took place over the course of only 11 days. Over this time, the city welcomed 1,423 athletes from 57 NSOs in 46 events (IOC, 2009c).

The creation of the TOP sponsorship program in 1985, after Los Angeles, meant that Calgary represented the first Olympic Games to take place under the TOP program. The first cycle of the program generated \$96 million, and as part of the program, Calgary had nine TOP sponsors in addition to 12 national sponsors, 37 official suppliers and 40 license holders (Chappelet, 2002). As Olympic marketing was evolving so too was ambush marketing; and the Calgary Games was the target of several ambush campaigns. With Visa as an official sponsor, a back and forth ambush campaign between themselves and American Express was the best example from these Games, while K-mart and Audi both caused ambush controversy as well (Graham, 1997).

As part of the national sponsorship with Petro Canada, Calgary continued the commercialization of the Olympic Torch Relay that had begun with its sponsorship by AT&T in coordination with the Los Angeles Games. In Calgary, the “Share the Flame” program sponsored by Petro Canada, offered Canadians the opportunity to carry the Olympic torch for one kilometre of its journey across the country. The organizing committee received 6,624,582 nominations for 6,525 positions in the relay (Payne, 2006); and the promotion went a long way towards building a more positive relationship between the petrol company and Albertans disillusioned with the gas industry. This positive relationship combined with the overwhelming interest of Canadians from all provinces has led to this being described by Olympic marketing experts as one of the most successful sponsorship programs ever (Payne, 2006). It is important to note, however, that while the program was very successful, Petro Canada was a competitor of Shell, who was an official sponsor of the Games. Such situations would come to be recognized as a form of ambush marketing in future Games.

Finally, the broadcast rights negotiated by the IOC for the Calgary Olympic Winter Games symbolized another turning point. A bidding war among American television networks led to the rights being sold for an unprecedented amount, well beyond their actual value (Payne, 2006; Slater, 1998). United States network rights fees from the Olympic Winter Games in Sarajevo just four years earlier brought in only \$91.5 million while the U.S. rights to Calgary sold for a remarkable \$309 million (Chappelet, 2002). Many factors including the date of the Games (during advertising sweeps week), the tactics of the IOC, and the determination and ego of the network executives can be used to explain the sudden increase (Payne, 2006). However, this enormous jump proved to be the exception rather than the rule when the following two Winter Games in Albertville and Lillehammer each brought only \$243 million and \$295 million respectively (Chappelet, 2002). Despite their status as the exception, the Calgary broadcast fees provided important financial learnings for the IOC. Following Calgary, the IOC conducted workshops on appraising the value of the Games for broadcasters, and reviewed their policies and procedures for the negotiation of broadcast contracts. From a marketing perspective, when the Calgary broadcast rights were negotiated in 1984, there was an increasing recognition of the dangers faced by the IOC in depending so heavily on television for its revenue. With escalating cost of the Games and the instability of the television markets, the importance of sponsorship as a secondary source became increasingly clear, and arguably contributed to the creation of the TOP program following the Los Angeles Games.

Atlanta 1996 Summer Olympic Games.

Atlanta was chosen to host the 1996 Summer Olympic Games in September 1990 at the IOC session in Tokyo, beating out competition from Toronto, Manchester, Belgrade, Melbourne and, the sentimental favourite, Athens. The Games were held from July 19th to August 4th 1996 and involved over 10,000 athletes from 197 countries (IOC, 2009d). Atlanta is the capital and largest city in the state of Georgia. At the time of the Olympic Games in 1996, the metropolitan population was estimated at 3.5 million inhabitants (Demographia, 2009). Significantly, it is also the headquarters for some of the biggest corporations in the world, such as Coca-Cola, AT&T, and Delta Airlines. Following the 1984 Summer Games in Los Angeles, the Olympic Games experienced a strong period of growth in all areas. From a marketing perspective, the IOC had used Los Angeles as a template and established the TOP sponsorship program, which was in its third phase during the Atlanta Games. See Table 2-1 (p. 19) for a detailed outline of the evolution of the TOP program.

The bidding by Atlanta for the 1996 Games was carried out by a purposely-created, independent and private body, which morphed into the organizing committee upon winning the bid. As was the case for Los Angeles in 1984, the Atlanta Games were a similarly private sector driven endeavour, which relied on broadcasting and sponsorship and had no endorsement of financial support from any level of government (federal, state, or local) (Toohey & Veal, 2007). However, as the Games approached, two critical problems pushed the Games towards over-commercialization. The first was a severe lack of funds. With governments playing no real role in financing the Games, the Atlanta Committee for the Olympic Games (ACOG) eventually began to realize it would need to

secure much more funding to stage the Games. As the organizers became more desperate, they began making sloppy last minute supplier arrangements, which the IOC and media believed undermined the very ideals of the Olympic image (Payne, 2006). This arguably would have not only hurt the Olympic brand itself, but also lessened its worth for those major sponsors who had paid significant money for the right of association (see Séguin & O'Reilly, 2008). The second problem was a severely dysfunctional relationship between the Atlanta city government, the ACOG, and the Metropolitan Atlanta Olympic Games Authority, in which the city was described as the “weak third party” in the Tri-Party agreement (Burbank et al., 2001, p. 88). The City was contractually negated from having to be responsible for any financial liabilities that may have resulted from the Games (Burbank et al., 2001). However, the city was determined to raise as much money as they could for themselves; as a result, they set up a program to rent out street property to vendors and anyone else wanting a platform for promoting their product or message to the Olympic crowds, essentially ambushing the Games taking place in their own city (Payne, 2006). This gave the city the feel of a chaotic and tacky capitalist carnival that was roundly condemned by world media (e.g., Halbfinger, 1996; Letts, 1996). Payne (2006) recalls Olympic Historian Bob Barney describing the scene as “roving street hawkers and frenzied vendors preying on residents and Olympic tourists like a horde of locusts” (p. 174).

In addition to the IOC and the ACOG being ambushed by the City of Atlanta through the street vending and other programs, Atlanta was also the setting for another landmark incident of ambush marketing involving Nike. In addition to sponsoring high profile athletes and their equipment, Nike engaged in a series of advertising campaigns

and other activities, which made a thinly veiled association to the Games and effectively ambushed the official partner, Reebok (Payne, 2006). This provided additional impetus, on top of the damage done by over-commercialization, for the IOC to re-examine their measure of brand control and protection. Payne (2006) claimed the experiences of Atlanta to be a “major wake up call for the IOC and a watershed moment for the Olympic movement” (p. 178). As a result of the problems in Atlanta, a 30-page list of marketing conditions was produced by the IOC in relation to the management of the Olympic property and ushered in a new era of brand protection for the future.

Salt Lake City 2002 Olympic Winter Games.

Salt Lake City, Utah played host to the 2002 Olympic Winter Games from February 8th to 24th, 2002. Seventy-seven nations participated with a total of 2,399 athletes competing (IOC, 2009e). It had been previously unsuccessful with bids for the 1972 and 1998 Games, but was elected as host city in June 1995 after beating out bids from Quebec City, Ostersund, and Sion. Salt Lake City is the Utah state capital and the biggest city in the state with the 2002 metropolitan population estimated at over 910,000 (City Data, 2009). The Salt Lake City Games reportedly realized a profit of \$52 million and fell under the fifth version of the TOP program, recognizing 10 official TOP sponsors and 53 local partners (Chappelet, 2002). The importance of the Salt Lake City Games for the evolution of Olympic sponsorship and ambush marketing is a consequence of global external environmental factors rather than anything specifically Games-related. When the Games began on February 8th 2002, they were the first Games to take place after the September 11th terrorist attacks on the United States. That they took place within the United States was a coincidence, but it would ensure the utmost attention was paid to

security concerns. Toohey and Veal (2007) argued that the Olympic Games have what they refer to as “increased terrorism capital” (p. 110). This is because they offer a global stage with much media attention and symbolise such concepts as peace, capitalism, and a global community. This potentially provides terrorists with the perfect means to make a major statement to the world through their actions. As a result of the increased threat, a massive overhaul of security procedures was undertaken at great cost to ensure the safety of participants and spectators. It is estimated that the overhaul increased the cost of security by \$70 million, bringing the total cost of Games security to around \$500 million (Kennelly, 2005 as cited in Toohey & Veal, 2007). Among the measures taken to enhance safety was the use of 15,000 personnel from 60 different federal, state and local organizations (Toohey & Veal, 2007). More specifically, the airspace surrounding the Games was restricted, airports were closed to commercial traffic during the opening and closing ceremonies, baggage was screened for explosives, vehicles were prohibited within 300 feet of any venue, and organizers purchased 15,000 anti-anthrax tablets (Toohey & Veal, 2007).

While the connection to the evolution of Olympic sponsorship and marketing is not as overt in this setting as is it in the others, it is no less important. The increasing costs of security put tight restrictions on an already strained budget for Salt Lake City, and that trend has continued beyond 2002. Additional revenues must balance the additional cost if organizers are to continue claiming profits. This increases the dependence of organizers on revenue from sponsorship unbalancing the power relationship between the IOC, OCOGs and the sponsors, making brand protection

measures even more important and ultimately leading to policies of suggested over-protection through legislation.

Vancouver 2010 Olympic Winter Games.

From February 12th to 28th 2010, Vancouver and Whistler hosted the Olympic Winter Games. With a metropolitan population that was estimated at 2.389 million in 2010 (Statistics Canada, 2013), Vancouver is the largest city in the province of British Columbia, the third largest city in Canada, and the biggest city ever to play host to the Olympic Winter Games. A large part of the Games costs was financed by sponsorship. There were nine TOP sponsors, six national sponsors, 10 official supporters, and 32 official suppliers (VANOC, 2009). Domestic sponsorship raised \$688 million and the TOP program is estimated to have contributed a further CDN\$200 million for total that represents a record high for sport marketing in Canada (IOC, 2012a; VANOC, 2008).

With such vast sums of money implicated in Olympic sponsorship, the increasing cost of hosting the Games, and the numerous threats to the Olympic brand, the IOC and OCOGs have moved into an era of strict brand protection in order to preserve the advantages offered to Olympic sponsors. This is evident in the enactment of anti-ambush legislation in Canada. In preparation for the 2010 Olympic Winter Games in Vancouver, the Canadian government passed Bill C-47, now known as the *Olympic and Paralympic Marks Act* (OPMA). This legislation provided extreme protection for official sponsors over and above what was already provided by the *Trade-marks Act*. Specific provisions in Schedules II and III were directly linked to fighting ambush marketing and only came into effect for a period of time around the Vancouver Games. They included protection

for words, and pictures directly relating to the 2010 Games such as ‘Whistler 2010’ and ‘Sea to Sky Games’ (OPMA, 2007). On the other hand, provisions in Section I protected other Olympic marks (i.e., the words ‘Olympic Games’ and ‘Faster Higher Stronger’) and are in place indefinitely (OPMA, 2007). The *Olympic and Paralympic Marks Act* was created as a response to the IOC’s requirements for host cities to protect official sponsors. The *Olympic and Paralympic Marks Act* “provides for the protection of Olympic and Paralympic marks and protection against certain misleading business associations between a business and the Olympic Games, the Paralympic Games or certain committees associated with those Games” (*Olympic and Paralympic Marks Act*, 2007, ¶ 2). OPMA specifically listed certain words and phrases such as Olympia and *Jeux olympiques*, as protected, and paved the way for the court to grant injunctions against those thought to be in violation of the legislation without having to meet the burden of proof which would otherwise be required. Many questions were raised over the necessity, scope, and justification for such measures (Geist, 2007; Scassa, 2008), but little in-depth research has been conducted. Canada is certainly not the first country to bring a formal legislation into place which seeks to fight against those attempting to ambush the Olympic Games (e.g., *London Olympic Games and Paralympic Games Act*, 2006); but, it does represent the opportunity to examine the impacts and consequences of this legislation as it happens. It also marks the beginning of a period where such legislation is an implicit or explicit requirement for the bid city in order to be considered as a host city.

Methods

Grounded theory building.

The dissertation's discussion seeks to answer its overarching purpose of theorizing ambush marketing in the Olympic Games using grounded theory building methods. Like case studies, grounded theory building was developed to assist researchers in understanding the complex phenomena that make up the social world (Suddaby, 2006). Glaser and Strauss (1967) are credited with providing the foundation for grounded theory methods. In its most basic form, they described it as "the purposeful, systematic generation [of theory] from the data of social research" (p. 28). A more detailed description, and that which is used for the purposes of this research, is provided by Charmaz (2005), who explained that: "grounded theory methods are a set of flexible analytic guidelines that enable researchers to focus their data collection and to build inductive mid-range theories through successive levels of data analysis and conceptual development" (p. 507).

Grounded theory can arguably be described as having five distinctive characteristics. The first, and perhaps most important, is the simultaneous collection and analysis of data (Charmaz, 2001). While it is acknowledged that the researcher will bring their individual interpretive frame of reference to their analysis, the essence of grounded theory building is that the codes, themes, and concepts, which will define the phenomenon, inductively emerge from the data as they are collected and are simultaneously categorized by the researcher. As the process of grounded theory building continues, the new data will then be used to help determine avenues for further data collection. This also relates to theoretical sampling that is explained below. A second

feature is the reliance on comparative methods. This denotes the strategy of constant comparison between each source of data and the emerging codes that have been identified by the researcher. This strategy helps move towards developing the properties of emergent categories and their relationships with each other (Charmaz, 2006). A third feature is the early development of categories. Many grounded theorists agree that the majority of categories emerging from the data will do so early in the research project (Charmaz, 2001; Glaser & Strauss, 1967; Martin & Turner, 1986) and then only require confirmation and elaboration through additional data collection and analysis. A fourth distinctive feature of grounded theory building is the use of intermediate analytic writing between coding and writing (Charmaz, 2001). This is described by Charmaz (2001) as memo writing. Its importance lies in forcing the researcher to code and analyze their data early in the process so as to keep the researcher involved in the data collection (Charmaz, 2006). By memo writing, the researcher is forced into the simultaneous collection and analysis of the data and the constant comparison of data, codes and categories as described above. The final feature of grounded theory building is the use of sampling for developing ideas (Charmaz, 2001), which is also called theoretical sampling (Charmaz, 2006; Glaser & Strauss, 1967). Simply put, theoretical sampling is where the “process of data collection is *controlled* by the emerging theory” (Glaser & Strauss, 1967, p. 45, emphasis in original). It involves the researcher examining the codes and categories, which have emerged from the data, and seeking to find further data that can fill identified gaps or lend further credibility to a concept, category or theme that has not reached saturation (Charmaz, 2006).

Data collection.

The use of multiple methods within a case study is called triangulation, where varied sources are combined to help confirm and justify the researcher's interpretation of the data (e.g., Creswell, 1994, 2003; Miles & Huberman, 1994). Miles and Huberman (1994) suggested that the researcher should pick triangulation sources that offer "different biases [and] different strengths so they can complement each other" (p. 267). For the purposes of this research, archival material, books, documents, and interviews were used to collect data. The archival material and documents are used as the principal data source, while the interviews serve to further compliment, elaborate, clarify, and corroborate the data from the archival material, specifically with regards to collecting contemporary data.

Archival material.

The understanding of archival material as it is presented in this dissertation combines two of Yin's (2013) methods of data collection: archival records and documentation. According to Yin, documentation includes such material as administrative documents, evaluations, and media clippings, while archival records include organizational, service and personal records, as well as survey data. The strength of these types of data lie in their stability, unobtrusive nature, exact details, broad coverage, and specifically in the case of archival material, the precise nature of the information presented (Yin, 2013). It is important to note, however, that the researcher must ensure they are aware of the context in which the data was created; specifically, the audience and purpose of the material must be considered (Yin, 2013). For this research, a total of 54 folders, containing 232 files were examined resulting in the collection of

approximately 2,300 pages of material for analysis specifically from the historical archives. In addition, other documentation that was used included, but was not limited to, books, bid documents, final reports, minutes from IOC sessions, as well as documents such as sponsor handbooks, IOC Marketing Message Reports, OGKM bulletins and other such material.

Interviews.

Interviews played a vital role in this research as they are among the most important sources of information within case studies (Yin, 2013) and are closely associated with grounded theory methods (Charmaz, 2001). Interviews are essential in instances where: (1) the phenomenon is highly episodic and infrequent (Eisenhardt & Graebner, 2007); (2) the researcher must understand and/or reconstruct something they did not experience; (3) historical information is required to fill gaps (Creswell, 2003; Rubin, & Rubin, 2005); (4) the researcher needs to be in control of the questioning (Creswell, 2003); and (5) how and why things change is being examined (Rubin & Rubin, 2005). This dissertation involves many of these areas thus making interviewing important.

Semi-structured interviews were conducted using a series of opened-ended questions. The semi-structured nature allowed the researcher to approach each interview with a general focus, as well as set questions, ensuring that important topics are covered but also allowing for flexibility within the interview process, specifically towards the order of questioning, the breadth of answers and the further development of points of

interest (Denscombe, 2007). Each interview was digitally recorded and transcribed to ensure accuracy and aid in data analysis (Rubin & Rubin, 2005; Yin, 2013).

Interviews took place with 12 individuals and were conducted in person, if possible, or via telephone. Please see Table 4-1 for more detailed information on the interviewees. It should also be noted that while their main affiliation is identified in Table 4-1, many of the interviewees have held, or currently hold, various other positions and affiliations within the Olympic marketing network which also informed their discussion.

The interviews lasted between 45 and 105 minutes given the availability of the interviewee and their knowledge on multiple subject areas. Due to the fact that the interviews complimented the archival sources and documents, the number of interviews conducted was dependent on the necessity for corroboration and further explanation, which emerged from the data, as well as the level of data saturation achieved. Glaser and Strauss (1967) describe saturation as the point when no new information or codes emerge from new data. Purposive sampling was used, and interviewees were chosen based on meeting the requirements set out by Rubin and Rubin (2005) who argued that interviewees with first-hand knowledge and experience, and who represent a variety of perspectives would add credibility to the results. In this research, those interviewees who worked directly on Olympic marketing, sponsorship, and brand protection at the highest, or close to the highest, level within their organization were interviewed.

TABLE 4-1: Interviewees

	Organization	Position*	Stakeholder Affiliation**	Interview Method	Identifier
1	International Olympic Committee	Member of Marketing Commission	IOC (NOC)	In person	IOC1
2	International Olympic Committee	Managing Director of Television & Marketing Service	IOC	In person	IOC2
3	International Olympic Committee	Marketing & Television Legal Services	IOC	In person	IOC3
4	International Olympic Committee	Director of Legal Affairs	IOC	Telephone	IOC4
5	International Olympic Committee	Legal Officer	IOC	In person	IOC5
6	International Olympic Committee	(Former) Director of Marketing	IOC (Agency)	Telephone	IOC6
7	ISL Licensing AG	Executive Vice President and Chief Executive	Agency	Telephone	AGN1
8	Meridian Management	Senior Vice President – Marketing and Sponsor Servicing	Agency (Sponsor)	Telephone	AGN2
9	Canadian Olympic Committee	(Former) Executive Director of Marketing and Communications	NOC	In person	NOC1
10	Salt Lake City Organizing Committee	Managing Director of Sponsorship Sales	OCOG	Telephone	OCOG1
11	Vancouver Organizing Committee for the 2010 Olympic and Paralympic Winter	Director of Commercial Rights Management	OCOG	Telephone	OCOG2

Games

12	TOP Sponsor	President	TOP Sponsor	Telephone	SPO1
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** Positions and stakeholder affiliations are reflective of the interviewee's involvement in the Olympic marketing network and may not reflect their current position.*

*** Bracketed stakeholder affiliations identify other positions held by the interviewee within the Olympic marketing network that have informed their knowledge.*

The interview guide (see Appendix A for a sample interview guide) focused on the key themes of each study, and themes that emerged out of the archival materials. For Study I, some key themes included precipitating jolts, facilitators, and barriers to change in Olympic sponsorship and ambush marketing; for Study II, the focus was on network positioning, power, and transfer of knowledge; finally, the aspect of the interview guide related to Study III addressed impacts of the Olympic and Paralympic Marks Act (experienced and projected, negative and positive, local, national and international).

Data analysis.

Data analysis for this research involved the use of content and network analysis, as well as principles of grounded theory building. Four guiding principles underscored the study. They were: (1) the conclusions which are drawn were rooted in the data; (2) the researcher's explanations emerged from methodical and thorough reading of the data; (3) the use of preconceptions was avoided as much as possible and; (4) the analysis was an interactive process which involved moving back and forth between the data and the codes and categorizations that emerged (Denscombe, 2007).

For all three studies, general content analysis of archival material and interview transcriptions was aided by the use of ATLAS.ti computing software but much of the

coding of archival material was done manually. The regulations of the Olympic Studies Centre do not permit original archival material to be photocopied in an effort to protect it from damage. As a result, a digital camera was used to photograph relevant archival documents page by page using a special setting for photography copying. The resulting files were created in a JPEG format that was not compatible with conversion to alternate file types, or recognition by the ATLAS.ti software. It is for this reason that much of the archival material was printed and coded manually. Alternatively, photocopied documents from the archives and other non-electronic documents were also coded manually as they too could not be uploaded to ATLAS.ti. Other forms of electronic data however (e.g., PDFs and Word documents) were converted into text files and uploaded to ATLAS.ti. Furthermore, all interviews were transcribed into Microsoft Word and uploaded into ATLAS.ti. According to Miles and Huberman (1994) “coding is analysis” (p. 56). Coding involves the organization of data into abstract categories beyond their descriptive meaning and provides initial structure to the data (Gratton & Jones 2004; Miles & Huberman, 1994). While coding for the overall purpose (theorizing ambush marketing in the Olympic Games took a more ‘grounded’ approach to creating codes (Strauss & Corbin, 1990), the three studies used what Miles and Huberman (1994) refer to as a “start list” (p. 58). This provides the researcher with an initial group of codes as they approach the fieldwork. This preliminary group is based on the defined objectives, research questions and theoretical framework among other things (Miles & Huberman, 1994). Examples of “start list” descriptive codes for each objective are outlined in Table 4-2.

TABLE 4-2: “Start List” for Open Coding

Study	Examples of Descriptive Codes
One	Brand protection Value creation Barriers to chance Precipitating jolts
Two	Power Knowledge flow/transfer Density Centrality
Three	Freedom Isomorphism Impacts Precedents

The creation of a ‘start list’ is the first of four steps involved in the coding process. While they are described as ‘steps’, it is important to note that movement between the steps was not unidirectional, and the researcher moved back and forth between the steps as the analysis progressed. Step two used the “start list” as a departure point when embarking on a careful reading of the archival material and transcribed interviews. In what is termed open-coding, the researcher examined the data and assigned either one of the identified starting codes or a new code or wider category that may emerge from the data to all statements identified as relevant to the research question (Gratton & Jones, 2004). During this process, the research also used memo taking as described earlier. This ensured that all of the researcher’s thoughts and interpretations of the data were considered in the analysis no matter when they were conceptualized (Miles & Huberman, 1994). This included the creation of new codes and categorizations. The third step in data analysis involved going back to the data after open-coding and re-examining it using all of the codes and categories identified during the first reading. Also termed axial-coding, this

step was more analytical than the first two, and involved the recognition of patterns, relationships, and explanations that threaded the data together (Corley, 2004; Miles & Huberman, 1994). As opposed to steps one and two, step three was inferential rather than descriptive (Miles & Huberman, 1994) and involved the creation of higher-order themes (Corley & Gioia, 2004). The fourth and final step was selective-coding consisting of the researcher returning to the data, codes, and categories to find illustrative cases of the outlined relationships or explanations from axial-coding. It also offered the opportunity to examine the data for other relationships that may have been missed in the initial stage of axial-coding (Gratton & Jones, 2004).

In addition to the above analysis, the second article included network analysis completed using UCINET network analysis computer software. Interconnected with network theory as outlined in the theoretical framework above, network analysis provides the tools for completing an examination of the relational data which connects one actor to another (Quatman & Chelladurai, 2008a; Scott, 2000). Fundamentally, network analysis “consists of a body of [...] measures of network structure” (Scott, 2000, p. 3). This included such measures as direction, distance, value, adjacency, density, centrality, cliques, and circles (Scott, 2000). These measures provided the researcher with the opportunity to (1) understand and explain interactions among various actors within the network; (2) determine the context and conditions which led to the establishment of such patterns; and (3) ascertain how the identified structures impacted upon the outcomes of the phenomena being studied (Quatman & Chelladurai, 2008a). The network analysis involved two key approaches, the visualization and quantification of network data. The use of these two approaches together ensured the researcher remains close to the data

despite a high level of complexity and abstraction offered by some of the measures (Quatman & Chellidurai, 2008a). The visualization aspect offered a visual mapping of the ties between actors within and across networks (Quatman & Chelladurai, 2008a). This provided the researcher the ability to observe obvious network structures. The second approach calculated various structural properties of the organizing committee networks (Quatman & Chelladurai, 2008a). This allowed the researcher to examine the relationships among actors within the network to determine how the network properties may have influenced power and transfer of knowledge (Quatman & Chelladurai, 2008a). Specifically, measures such as density and centrality were calculated and examined.

Finally, data from the three studies was analyzed for the discussion using the grounded theory methods outlined above. Coding took a ‘grounded’ approach with codes, categories, themes and relationships emerging from the data as they were simultaneously collected and analysed (Charmaz, 2001, 2006; Glaser & Strauss, 1967).

Research Quality

Each researcher must conform to those principles that best represent their personal assumptions. For this dissertation, the concept of ‘trustworthiness’ as originally presented by Guba (1981) is used to gauge research quality as it is a concept which is supported by the researchers theoretical perceptive as outlined in Appendix B.

Trustworthiness can be judged according to the presence of four factors which “increase the probability” (Guba, 1981, p. 88) of trustworthiness. The first is credibility, which is attained when the researcher has considered context (Guba 1981), makes sense, and presents an “authentic portrait” of the phenomenon (Miles & Huberman, 1994). The second is transferability, attained through a recognition and explicit discussion by the

researcher of the suitable parameters of generalization from the research (Guba, 1981; Miles & Huberman, 1994). The third is dependability, which refers to the necessity for uniformity in the process over time, researchers, and methods (Guba 1981), thus protecting against the potential for the instability of data (Miles & Huberman, 1994). The fourth is confirmability. Quality research offers a transparent path between the data and findings (Meyrick, 2006). Researchers must recognize the potential impact of their biases and offset this risk with a shift towards the confirmability of data and interpretation using methods such as triangulation (e.g., Creswell, 1994; Miles & Huberman, 1994). Table 4-3 provides a more detailed outline of the concept of trustworthiness and how it was approached in this study.

TABLE 4-3: Trustworthiness

Trustworthiness (increase the probability)	Explanation	Researcher Actions
Credibility	Attained when the research has considered context, the research conclusions make sense to researchers and those studied, and presents an “authentic portrait” of the phenomenon	• Prolonged engagement in field and with participants • Triangulation using multiple sources of data to enhance data collection • Used member checking by sending transcripts back to interviewees to ensure they accurately reflect their feelings. • Ensured the account rings true, makes sense, and seems convincing
Transferability	Attained through a recognition and explicit discussion by the researcher of the suitable parameters of generalization from the research.	• A section in Chapter 9 discussed the understood limitations on generalizations for this study
Dependability	Refers to the necessity for uniformity in the process over time, researchers and methods thus protecting against the potential for the instability of data.	• Data was collected across a full range of appropriate settings, times, respondents etc. and according to research questions. • Triangulation using multiple sources of data to enhance data collection and analysis • The researchers role and theoretical perspective are described in Appendix B
Objectivity	Offers a transparent path between the data and findings. The researcher must recognize the potential impact of their bias, and offset this risk with a shift towards the confirmability of data and interpretation	• Methods and procedures are clearly described • Appropriate sequence of data collection, and analysis • In providing a description of the researchers theoretical perspective the impact of those assumptions on the

using methods such as triangulation.

- research is noted.
- Triangulation using multiple sources of data to enhance data collection and analysis.
-

Chapter 5: Study I – The Evolution of Olympic Sponsorship and Ambush Marketing

Results and Discussion

This study suggests the evolution of Olympic sponsorship during its most critical period of growth can be broadly described as an overall sophistication of sponsorship attitudes, structures and relationships. In examining the data, there appears to be three individual, yet interconnected, phases of evolution that can be identified. It is important to note that such phases are not entirely clear cut; rather, each phase shows a general trend that builds on the previous phases and are shaped in relation to the barriers, facilitators, and precipitating jolts of change experienced during each particular time period. That is to say, although the phases have been generally grouped according to their adherence to the six Olympic Games selected as case studies, sponsorship and ambush marketing characteristics within one phase may have begun to emerge during an earlier phase. In addition, the changes that take place during each phase act as a facilitator for the changes that emerge in the following phases. The first phase identified took place prior to the creation of the IOC's TOP marketing program. It emerged around the Montreal 1976 Games, and lasted until the time of the Los Angeles's Games in 1984. This phase will be described as 'development of the Olympic property' and specifically includes evolution in areas such as the increasing attention towards, and changing views on, Olympic emblem use, and a shift in attitudes around commercialization and the Olympic Games. The second phase identified is described as the 'sophistication of Olympic sponsorship'. This happened roughly over the period between the Los Angeles Games in 1984 until the Atlanta Games in 1996, and involved changes in the recognition

of the need for mutually beneficial relationships, the creation and control of the sponsorship environment, and increasing sponsorship formalization and complexity. Finally the third phase, from the Atlanta Games in 1996 to Vancouver 2010 is identified as the time of ‘the Olympic brand’, and involved the recognition, management, and protection of the Olympic brand alongside continued increases in formalization and complexity of Olympic sponsorship. Alongside the latter two phases of sponsorship evolution, the practice of ambush marketing also progressed specifically with regards to the Olympic Movement’s recognition and understanding of the practice and the tactical sophistication both of ambushers and those fighting the practice. This evolution along with each identified phase is discussed in more detail below.

Developing the Olympic property: Montreal 1976 – Los Angeles 1984.

Prior to the 1970s, commercialization and the Olympic Games were viewed by those within the Movement as entirely incompatible despite the long-term involvement of sponsors with OCOGs, including Coca-Cola who had sponsored the Olympic Movement since 1928. By the mid-late-1970s, however, a begrudging, though still suspicious, acceptance of the unavoidable nature of commercialization began to take hold within the leadership of the Olympic Movement. The most notable aspect of the changes toward sponsorship at this time were evidenced in the slightly shifting attitudes towards the concept of the Olympic Games as a commercial property given benefits of, and need for, general commercialism, and the related need to enhance overall control over the Olympic symbol on an international scale. In this section, these early barriers and shifting attitudes towards commercialism are examined, together with as the movement towards increased emblem control that also took place during this period.

Early barriers and shifting attitudes.

The general attitude towards commercialization within the Olympic Movement prior to the late 1970s was one of resistance and discomfort. Many IOC members felt that the commercialism of the Olympic symbols (i.e., the Olympic rings, motto, flag, etc.) would be contradictory to the ideals and values of the Olympic Movement. For instance, Monique Berlioux, an IOC employee since the 1960s and the director of the IOC from 1970 to 1985, provided enduring opposition to commercialization, and was never entirely comfortable with such practices even after they became more commonplace. Some attribute this to her unwillingness to give up power to outside sources (Payne, 2006; Pound, 2004). Similarly, many NOCs were vehemently against the commercialization of the Movement. The Hellenic Olympic Committee (HOC) went so far as to suggest that the Games be permanently hosted in Greece, a country that they believed valued the Olympic ideals above all else, as a way to fight against the onslaught of “vain ostentations and advertising techniques that are inevitably tied with financial interests” (IOC, 1977, p. 71). While the idea that commercialism was evil and potentially ruinous to the Movement was evident in the opinions of NOC representatives, some NOCs rejected the commercialization of the Olympic symbols based on their own needs. For many, the small commercial programs they engaged in within their own territory using their Olympic marks, were among their only sources of revenue for the NOC. This was discussed at the Prague IOC session in June 1977. It was noted in the minutes as part of this discussion that some IOC members “stressed the importance for the NOCs to have complete control of the marketing in their countries, since many of them relied almost exclusively on commercialization of their emblems for their income, as they received no

funds from their governments.” As a result, it was felt that the international proliferation of Olympic commercialism might infringe on their territorial rights to exploit their own marks and therefore support the Olympic Movement in their country.

Despite such resistance and barriers, the period after Montreal began to see a shift in the attitudes towards a relationship between the IOC and commercial projects. That is not to say that all were onboard with such shifts, but gradually those in favour, or willing to tolerate such change, began to outnumber and outrank those unequivocally opposed. While some NOCs had made their opposition to commercialization unmistakably obvious to the IOC, the organization began to solicit the opinions of all NOCs on the matter, trying to feel out how advancement in this area would be received by the majority of the NOCs around the world. In asking questions on the state and future of the Olympic Movement, the topic of commercialization was approached rather indirectly but with a view to understanding a greater proportion of attitudes. While the response was varying, it was noticeable that those opposed continued to be louder in their condemnation if not greater in number. Despite the continued voices of dissent, the IOC was sufficiently encouraged to make moves towards commercialization. The creation of the New Sources of Finance Committee in 1981, and the formalization of discussions around the creation of what would become the TOP sponsorship program in 1983 marked the clearest indications that the overall attitudes of the IOC, or at least those with the greatest influence, had shifted and become much more favourable towards the idea of commercial relationships. It was a realization that the correct answer to changing times and needs might be the closely guarded management of an IOC led program rather than a total avoidance of commercialism.

Emblem control.

The shifting attitudes of the Olympic Movement towards commercialism were mirrored in the way the IOC approached emblem control in the years following the Montreal Games. The IOC Emblems Commission was formed in the 1950s to be guardians of the Olympic symbol, but their role was further complicated as the aforementioned shifting attitudes towards commercialization began to take hold. The Commission, and by extension the IOC Executive Board, was increasingly drawn into an overt and active role with regards to discussions and decisions on emblem protection and eventually commercial issues. As a result of the move towards a focus in emblem protection, the Emblems Commission was disbanded in 1977 as its responsibilities were mostly taken over by the IOC Judicial Committee and the IOC's legal advisors. This is noted in the minutes of the 77th IOC session in Prague from June 1977. The move towards emblem protection rather than simple guardianship is reflected in the changes made to the Olympic Charter during this period. The newest version of the Olympic Charter in 1978 expressly placed responsibility for the international protection of Olympic symbols on the shoulders of the IOC, with the By-law to Rule 6 of the Olympic Charter changed to read: "[The IOC] shall take every appropriate step possible to obtain their legal protection on a national and international basis. [The IOC] shall also lend its support to efforts the NOC must make to obtain the protection of the Olympic flag, symbol, and motto for the IOC within their country" (IOC, 1978a, p. 41). Prior to this change, the Charter had only formally mentioned the roles of NOCs in this area. Furthermore, by the 1980 version of the Olympic Charter, the IOC was living up to this responsibility by yet again amending the By-law to Rule 6. This amendment encouraged

NOCs to seek protection for the words “Olympic” and “Olympiad” in their own countries on behalf of the IOC, marking the first real step towards IOC involvement, albeit indirect, in widespread global protections. The bylaw to Rule 6 was amended to read: “it [an NOC] shall also endeavour to secure for the IOC, protection for the terms "Olympic" and "Olympiad" (IOC, 1980, p.36).

At the same time, another example of development in the IOC’s approach to their emblems was exhibited in its seeking out an international treaty for the protection of Olympic symbols through the World Intellectual Property Organization (WIPO)⁴. This can be noted in the IOC session minutes from 1978 that stated, “a certain amount of progress has recently been made in the question of international protection of the Olympic symbol (the five interlaced rings)” (IOC, 1978b). The minutes go on to list various approaches acknowledged by the IOC (e.g., the use of the Madrid arrangement, initiatives taken on by Tunisian and Kenyan NOCs) eventually noting that the IOC had expressed, to the WIPO, an interest in what was going on in Kenya (Nairobi) and Tunisia. The resulting Nairobi Treaty was signed in 1981, but only ratified by a handful of countries and NOCs, none of which represented what could be considered the ‘major’ commercial players in the Olympic Movement (i.e. the USOC, COA, BOA, etc.) (See Appendix C for a list of contracting parties). Nevertheless, the IOC likely viewed the treaty as another step forward, and the change was again evident in the Olympic Charter published in 1982 when the following passage was added to the first point of the By-law to Rules 6 and 53: “The NOCs must do their utmost to take the necessary steps to ensure

⁴ The WIPO is an agency of the United Nations whose mission is “to lead the development of a balanced and effective international intellectual property (IP) system that enables innovation and creativity for the benefit of all” (World Intellectual Property Organization, 2013, ¶1)

that their countries become party to the treaty concerning the protection of the Olympic symbol” (IOC, 1982 p. 36). While not specific to the period following the creation of the Nairobi treaty, such requests for NOCs came alongside continued offers of support from the IOC with regards to protecting the Olympic marks. Those NOCs that did not have the capacity to lobby government or examine the possibility of such protection in their own countries’ legal system were given unambiguous opportunities to seek the advice of the IOC on such matters; although those willing to take it were limited. This showed the increasing concern of the IOC for such matters and the escalating involvement in how its emblem is used and protected around the world. This change, however, highlighted two key interconnected barriers the IOC faced in the enhanced protection of their emblems: (1) its own lack of legal territory and international sway; and (2) its resulting reliance on NOCs that oftentimes lacked knowledge, and were inexperienced and ineffectual in these areas.

The final example of a shift in the approach to Olympic emblems took place with regards to use of the Olympic symbol for commercial and publicity purposes. As mentioned in the section above, by 1983, there was a formalization of discussions around the creation of what would become the TOP sponsorship program. As a result, the Olympic Charter-defined rules of the IOC that governed the use of the emblems were changed in order to accommodate such an endeavour. By-law 7 to Rules 6 and 53 of the 1983 Olympic Charter read: “The use of the Olympic flag, symbol, flame, and motto for commercial and publicity purposes of any kind is strictly forbidden **except by the IOC**” (Emphasis added, IOC, 1983, p. 36). With the addition of the four words “except by the IOC” the Olympic Movement essentially declared itself ready to commercialize its

emblems. Like its attitude towards general commercialization, there was recognition that tight, internally controlled commercialization of Olympic emblems within the closely guarded management of an IOC-led program was the way forward.

Overall, it can be argued that the need for tighter controls over Olympic emblems and the overt shift in the approach to emblem use for publicity or commercial purposes demonstrated an increasing recognition of their potential commercial value, the evolving place of commercialism in the Movement, and the corresponding need to shift the attention of the IOC to challenges related to the development of the Olympic Games as a commercial property during this period.

Why this change?

The shifting attitudes and approach to emblem control that characterized the early development of the Olympic property can be attributed to any number of elements; but there are three areas that have been identified as important to the changing attitudes. The first was the fact that, going into the 1980s, the IOC found itself in an increasingly precarious financial situation. Its revenue was almost entirely based on television rights fees. Although this had sustained the Movement for many years, boycotts, terrorist attacks, and the increasing cost of hosting the Games were undermining the foundation of the Olympic Movement and straining the resources of the IOC. In fact, it has been acknowledged that, in the early 1980s, the IOC was close to bankrupt. Former Director of Marketing Michael Payne noted that, at one point, the IOC had “less than \$200,000 in liquidity and just \$2 million in assets” (Payne, 2006, p. 9). The need to diversify revenue sources was obvious to those within the Olympic Movement who had an understanding

of business matters, and it was directly out of this concern that the New Sources of Finance Committee was formed in an effort to research and report on how such diversification might be accomplished.

Similarly, in the period immediately following the 1976 Games in Montreal, the willingness of cities and governments to take on the task of financing the Olympic Games began to evaporate. The aforementioned increasing costs of hosting so clearly demonstrated by Montreal served as a warning to other cities. As a result, there were only two cities that bid for right to host the 1984 Games: Tehran and Los Angeles. When Tehran dropped out of the race for internal political reasons, the choice became Los Angeles or no Games at all. This caused great concern among the IOC members, as, unlike other cities, Los Angeles was unable to provide any assurance of government funding, and as a result, would be required to finance the Games entirely through private enterprise. Despite protestations of potential damage to the Olympic Movement through the evils of commercialization, there was really little choice but to allow Los Angeles to host the Games ‘their own way’. Although their reports to the IOC stressed their desire to keep the commercialization of the 1984 Olympics to a minimum, describing them as “among the least commercial of the modern Olympics” (IOC, 1984, p.4), the private funding of the Games made many in the IOC nervous about such a precedent. The commercial program created by the LAOOC would prove to be very successful, generating more than \$123 million through greatly limiting the number of sponsors but increasing the amount each company paid and creating a program selling ‘exclusive’ rights to one sponsor within a defined product category including cash and value in-kind sponsorships. At a time when the IOC was itself creating a comprehensive sponsorship

program, the LAOOC's approach acted as a general guide for structuring the IOC program while at the same time demonstrating how commercialism could be made to work within the confines of the Olympic realities.

The last key to the developments made in Olympic sponsorship during this period was the arrival of individuals, who recognized the need of the Movement to embrace commercialisation rather than hide from it, into key positions of power and decision-making within the IOC. These individuals were not afraid to stand up against the opposition they felt along the way and served to create the foundation of stability so greatly needed in the uncertain financial situation in which the IOC found itself. The most influential of these people was Juan Antonio Samaranch who took over the IOC presidency in 1980. From early in his presidency, Samaranch took an active interest in building and controlling the commercial side of the Olympic Games, creating the New Sources of Finance Commission, amending the Olympic Charter to allow the IOC to use their own emblems for commercial purposes, and commissioning the creation of the TOP program. At the same time, he surrounded himself with those knowledgeable in marketing matters who shared his views on Olympic commercialism, including close friend and Olympic outsider Horst Dassler of adidas and Dick Pound, a Canadian lawyer and IOC member who would go on to chair both the Television Negotiations Commission and the eventual Marketing Commission, as well as serving as Vice-President for most of Samaranch's term as IOC President. As such, pro-commercialization individuals began to inform the IOC leadership; some of those who opposed commercialism began to lose their grip on power. As Director of the IOC from 1970-1985, Monique Berlioux's influence on the Olympic Movement was almost

unparalleled until the arrival of Samaranch. In fact it was argued that: “with a succession of largely absentee presidents, she quickly consolidated her power. Many regarded her as the *de facto* IOC President. In the 1970s, she ran the IOC like the headmistress of a Swiss finishing school” (Payne, 2006, p. 25). While the absence of the previous IOC President Lord Killanin from the office in Lausanne allowed Ms. Berlioux to consolidate her power, the presence of President Samaranch and his conflicting views on both her authority and the issue of commercialization, among other things, would lead to her declining control and eventual ‘retirement’ from the Olympic family in 1985. A powerful voice against commercialization was silenced, while those who supported it grew in number, influence, and knowledge. This is a trend that would continue into the next phase of Olympic sponsorship’s evolution that is discussed in the next section.

The sophistication of Olympic sponsorship: Los Angeles 1984 – Atlanta 1996

The attitudes to commercialism and the use of the Olympic emblems and marks continued to soften, hence facilitating the general sophistication of Olympic sponsorship though the creation and success of the TOP program. The major changes that took place in this period involved the creation and control of the sponsorship environment, an increasing recognition of the need for mutually beneficial relationships, and the enhancement of expertise and capacity in the area of Olympic sponsorship. Furthermore the practice of ambush marketing surfaced and recognition of the practice by the Olympic Movement marked the beginning of proactive and reactive anti-ambush strategies.

Creation and control of the sponsorship environment.

Like most identified changes in Olympic sponsorship, the creation and control of the sponsorship environment served as a facilitator of change as well as an evolution in and of itself. This is particularly true with regards to the most important aspect of the creation and control of the sponsorship environment that was the formation of the TOP sponsorship program. The first three sets of sponsor for TOP I, TOP II and TOP III, existed during the period between Los Angeles 1984 and Atlanta 1996, for details on each edition, see Table 2-1 (p. 19). An in-depth discussion of the entire program and its evolution is beyond the scope of this section; still, its influence in the development of Olympic sponsorship is seemingly enormous, shaping all changes that have taken place in the years following its inception. The basic key components of TOP rested in its granting of exclusivity to a limited number of world-wide partners facilitated by the signing of agreements with NOCs around the world. Prior to the creation of the TOP program, NOCs had singular control of the sponsorship environment in their country; and OCOG sponsors wishing to advertise in a particular country had to seek permission and/or develop another relationship with each individual NOC, thus making a truly global connection to the Games unrealistic for even the most multi-national of sponsors. This represented one of the main barriers to the evolution of Olympic sponsorship, as negotiations with many NOCs, most importantly the USOC, were difficult and caused much anxiety. In the first TOP version, the USOC participated but under their own conditions. A letter from Howard Stupp to Juan Antonio Samaranch in December 1985 notes that:

Although the USOC has signed an agreement with ISL to participate in the TOP program, the USOC has reserved the right to itself enter into agreements directly with TOP Program Sponsors (i.e. “USOC/SPONSOR Agreement”). In this way, the USOC need not enter into an agreement with a sponsor for any particular product category if it (the USOC) is not satisfied with the consideration it would receive for such product category. As a consequence of such a set up, the USOC receives its share, pursuant to the TOP program directly from the sponsor. (p. 2)

As a result of receiving no government funding, being home to many wealthy multinational corporations, and strong public interest in the Games, the USOC, unlike many of the smaller NOCs, had a well-developed sponsorship program that supported the Olympic Movement in the United States. This meant there was little incentive for them to sign an agreement with the IOC that they felt would benefit others while taking away from their ability to raise funds. Many of those companies that would become TOP sponsors were current or potential sponsors of the USOC; so it took a series of tense and drawn out negotiations before the USOC agreed to fully join the TOP program. In the end, their cooperation was only secured by giving them a significantly larger proportion of the revenue from the TOP program than any other NOC. In fact, for many years, they received the same percentage of revenue from the TOP program as all other NOCs combined. With the eventual cooperation of the USOC in 1985, the creation of the TOP program essentially produced the first global Olympic sponsorship environment and developed the measures for controlling such an environment at the IOC level. The program provided each company with the assurance that they would be the only company in their product category to be able to use the, hereto unusable, Olympic rings in

worldwide marketing activations while limiting the overall number of worldwide product categories demonstrating that the key controls within this environment providing value for the IOC were arguably based on the vital and complicated principals of exclusivity, scarcity, and global reach. In controlling these elements, it is argued that the IOC regulates Olympic sponsorship and, by extension, the growth of commercialism in the Movement. This is important as documentation such as personal correspondence from IOC and NOC members shows anti-commercial sentiments had not been totally eradicated at this time; however, it was largely practical questions (i.e., taxation on sponsorship money, managing the amount/type of commercial association) rather than purely ideological questions which tended to be raised. Similarly, while some ideological objections were noted, they seemed to recognize that commercialism was moving forward while at the same time suggesting this should be done carefully and with ideological principles in mind. In a letter from Mr. Masaji Kiyokawa (IOC member in Japan) to Juan Antonio Samaranch that was included in the 1984 Session minutes, he argued that:

We all noted the excessive commercialism in the Games in Los Angeles. Perhaps the activity that still remains in our memories is the issue of the US\$3000 charge for the torch relay runners. Our Greek colleagues and people in Olympia raised sharp voices against the LAOOC concept. I feel that in future Games, the IOC should regulate commercialism in accordance with our fundamental principles.

(Kiyokawa, 1984)

This perhaps suggests such tightly controlled commercialism could, perhaps, manage anti-commercial attitudes and continue to move Olympic sponsorship forward.

While the need for the IOC to secure relationships with NOCs around the world in order to make the TOP program possible was one step in the control of the sponsorship environment. Later in this period (the late 1980s), there was an increasing recognition that joint marketing programs between the NOC and OCOG of a host country were also important. As the IOC entered the sponsorship mix, it began to recognize that there were too many stakeholders wanting to cash in on the Olympic Games in a host territory; so it began insisting upon joint marketing agreements in an attempt to avoid clutter, over commercialisation, ambush marketing, and, ultimately, the dilution of IOC and OCOG sponsorship program value. Since Calgary, joint marketing programs began to emerge with the revenue shared by both parties with the program managed by the OCOG. By the early 1990s, recommendations that such an agreement (in some form) would exist before the city's election had become part of the IOC bid manual. The IOC Bid Manual for the 2000 Olympic Games which was released in 1992 stated that:

In order to deliver a “clean – exclusive” marketplace for the single joint marketing program the OCOG/NOC must combine all of their marketing rights into a single centralized programme. This has been standard practice since Calgary 1988- however experience would indicate that many problems can be avoided if agreement is reached before a city's election. (IOC, 1992, p. 36)

While this would be further expanded to include other stakeholders, including the host city itself, in the years following the Atlanta Games, the desire of the IOC to unite national (NOC and OCOG) marketing programs was yet another step in the control of the Olympic sponsorship environment early in its existence.

Given the previously discussed reluctance of some in the Olympic Movement to totally embrace commercialism, even as it was becoming a successful part of Games funding, part of the creation and control of the Olympic sponsorship environment was the ‘marketing of Olympic sponsorship.’ This refers to the IOC’s efforts to sell the concept of Olympic sponsorship and its importance to the Olympic family as well as the public. This was accomplished by using media sources to explain why such funding was required and how exactly the sponsorship money went towards funding the Movement while protecting and enhancing the values central to the Games. For example, in the early and mid-1990s, magazines such as *Forbes* and *Sports Illustrated* included pull-outs explaining to the public the dynamics and importance of Olympic sponsorship. Similarly, the 1989 and 1996 issues of the IOC publication *Olympic Message* focused directly on informing and educating the Olympic family on matters relating to Olympic marketing and sponsorship. Specifically, the 1989 *Olympic Message: Marketing and Olympism* included articles entitled: *Sport and Industry*; *The National Olympic Committees and Marketing*; and *Sponsorship and the Olympic Games*. The 1996 *Olympic Message: Source of Financing for Sport* included such articles as: *The Importance of Commercialism for the Olympic Movement*; *The Evolution of Olympic Commercial Partnerships*; *Olympic Marketing in the New Millennium*; and *Sponsorship and Television*. Without the continued support of those in the Olympic Movement and the consuming public, the Olympic sponsorship environment would no longer provide any value to potential sponsors; so such ‘marketing of sponsorship’ was key.

The emergence of ambush marketing during this period was also reflected in the way the IOC began to control the sponsorship environment. As already mentioned, the

Look of the Games and Clean Venue programs were part of this; but other protections against ambush also emerged. Although the more specific anti-ambush tactics will be discussed in the ambush marketing section below, the important point for this section is that the IOC recognized and acted on the need to control the practice as part of creating the best environment for sponsorship.

Finally, the creation of the sponsorship environment during this period was also furthered by the introduction of supplementary sponsorship programs that could offer differentiation for sponsors. This shows the IOC's recognition that it needed to continue developing the sponsorship environment in order for it to grow despite criticisms of over commercialization. One example of this can be found in the Torch Relay. Despite enduring and strong protestations, particularly from the HOC who went so far as threatening to cancel the official lighting ceremony at Olympia in advance of the Los Angeles Games because of their opposition to any link between the Olympic flame and money or commercialization, by Calgary in 1988, the IOC was more supportive of the Olympic Torch Relay as a valuable sponsorship property. The sponsorship of the 1988 Relay by Petro Canada was hugely popular and successful with the organizing committee receiving 6,624,582 nominations for 6,525 positions in the relay (Payne, 2006). Similarly, Coca Cola, who was already a TOP sponsor of the Games, also sponsored the Torch Relay in the lead up to the 1996 Games in Atlanta, giving them the opportunity to differentiate themselves by expanding their sponsorship program beyond that of other TOP sponsors. In the final report for the Atlanta Games, it was noted that:

On February 1995, The Coca-Cola Company contracted with the ACOG to expand its Olympic sponsorship and become the presenter of the 1996 Olympic

Torch Relay. After much negotiation, the presenter was given specific marketing rights and allowed to select 2500 torchbearers and 2500 escort runners.

Additionally, The Coca-Cola Company was the only entity allowed to create Torch Relay-related advertising. (ACOG, 1997, p.490)

This might be viewed as another movement towards the creation of a sponsorship environment around the Olympic movement.

This concept of differentiation further links to the next major change that took place within this phase of Olympic sponsorship evolution that is discussed in the following section.

Increasing recognition of the need for mutually beneficial relationships.

As the sponsorship environment became more complex and controlled, so too did the sponsorship arrangements themselves. There was an increasing recognition of the importance of mutually beneficial relationships between rights holders (sponsors) and property owners (IOC, OCOGs). As the level of investment required on behalf of sponsors increased, it became ever more important that those responsible for the sponsorship were able to present a 'business case' which justified the investment to others in their organization. The need for an ROI meant a move away from the emotion-based decision-making that was in many cases characteristic of Olympic sponsorship. No longer was the emotional attachment of a marketing manager a good enough reason to spend millions of dollars to associate with the Games, there would now be an emphasis on how this association would benefit the business-side of a potential sponsor. In an

article written for the 1989 *Olympic Message*, then IOC marketing director Michael Payne wrote:

Sports sponsorships today must be seen as partnership where both parties can receive benefits. Sponsorship is no longer a donation from a benevolent party; to treat it as such is to considerably limit the potential benefits that sport can gain from working with industry. (p. 37)

In making the case for sponsorship from a business perspective, the breadth of sponsorship benefits expanded. These changes were required in order to meet increasing expectations of sponsors and ensure Olympic property owners were able to offer more than just the opportunity to feel good about contributing to a worthy cause or the “eyeballs things”, referring to an amalgamation of sponsor brands and the Olympic rings in commercials and advertisements where the only exposure of consumers is to a picture of the two brands used in combination. An example of the expanded breadth of sponsorship to meet these expectations can be identified in the way the IOC developed its sponsor hospitality, sponsor recognition and sponsor servicing programs during this time, essentially giving sponsors more tangible returns for their investment. For example, an ISL document shows the agenda for a TOP Sponsor Workshop in 1990 that included such events as presentations by upcoming OCOGs, a review of the sponsor handbook, one-on-one meetings, tours of the IOC Museum, and a gala dinner hosted by Juan Antonio Samaranch. While it was difficult to put a numerical value on such returns, sponsors required to demonstrate the value of Olympic sponsorship could make the argument for such brand-based benefits.

Finally, the term ‘mutually beneficial’ implies that benefits go both directions; this was the case with the evolution of Olympic sponsorship. While the above paragraph discussed the increasing benefits for sponsors, the first and most obvious benefit for the Movement was the money or value in-kind it received from sponsors. During this period, however, there was also an increasing recognition that beyond the money sponsors also offered the Olympic Movement its most valuable form of marketing. In activating their sponsorships through the use of Olympic symbols and themes, sponsors likely served to put the Olympics in the mind of consumers and helped build excitement about the Games and Movement. In the *Marketing Message* article discussed above, Payne noted: “there is a very simple maxim in sports sponsorship – the more sport gives to industry the greater the benefit it will receive in return” (1989, p. 137). It was important for the continued success of the Games that both sponsors and the IOC recognized this and exploited the opportunity to advance the Movement through activations. In ensuring that sponsors were taking full advantage of the rights they had purchased, they would therefore be providing increased benefits for both contracting parties.

Enhancement of expertise and capacity in the area of Olympic sponsorship

A third area which speaks to the increasing sophistication of Olympic sponsorship during the period between the 1984 Olympic Games in Los Angeles and the 1996 Olympic Games in Atlanta was the enhancement of expertise and capacity in the area of sponsorship within the Olympic Movement. As with many of the other areas, this was a facilitator for the evolution of sponsorship as well as a change itself. This process began with the previously closed organization of the IOC opening itself up to advice and assistance from outside sources with greater knowledge of marketing and sponsorship. It

was previously discussed that President Samaranch had a working and personal relationship with Horst Dassler of adidas; it was through this connection that much outside influence began to impact the evolution of Olympic sponsorship. Despite the creation of the New Sources of Finance Committee with the intention of looking into matters of commercialization, the actual level of knowledge within the IOC about marketing and sponsorship was extremely limited prior to the mid to late 1980s. As one interviewee noted: “there was almost a quaintness in the IOC approach to sponsorship. They called themselves the New Sources of Finance Committee” (AGN2). In 1983, amid early discussion of what would be the TOP program, the IOC Executive Board authorized the signing of a preliminary contract with an agency called ISL, of which the Dassler family was the primary stakeholder. It was not until the 28th of May 1985, however, that a contract was signed and ISL was formally a representative of the IOC. In bringing ISL aboard, the IOC instantly and substantially increased its marketing and sponsorship expertise and capacity. The contract even noted:

Whereas ISL’s associated companies have experience in merchandising, marketing, promotion and sport marketing and ISL wishes to enter into an agreement with the IOC whereby ISL shall be the IOC’s worldwide exclusive agent with respect to certain commercial opportunities available to the latter; and whereas, the IOC recognizes the potential contribution to the achievement of its objectives which ISL is in a position to make. (ISL/IOC, 1985, pp.1-2)

ISL provided the IOC with the resources to carry out a worldwide sponsorship program providing support, human resources, focused essential knowledge, and experience that was desperately lacking among the IOC membership and employees. Initially, ISL was

responsible for developing the program structure from the ground up and selling the concept of the TOP program to NOCs and OCOGs on behalf of the IOC. As the program evolved and came to fruition, their responsibilities moved towards selling and servicing TOP sponsorships as can be seen in such examples as the sponsor workshop put on by ISL as discussed above.

While the external involvement of ISL was the first step towards enhancing Olympic sponsorship and marketing expertise within the IOC, it was only logical that as the TOP concept was seen as successful, it would create a need for the development of an internal organizational structure for increased capacity in the area of sponsorship. This was accomplished in 1989 when the Marketing Department of the IOC was created to oversee all marketing activities from the IOC headquarters in Lausanne. The Department was headed by Michael Payne who became the IOC's first-ever Director of Marketing when he joined the IOC from ISL, having already worked on the creation of the TOP program. Prior to his arrival, the legal department had typically dealt with marketing matters at the IOC staff level with guidance from ISL and members of the New Sources of Finance Commission, such as Dick Pound. As noted by an interviewee:

A challenge that we also faced in the IOC was that they had absolutely no structure whatsoever in place to run such a program and, in fact, in the early stages believe it or not the only day to day counterpart we [ISL] had at the IOC was Howard Stupp...the General Council for the IOC. (AGN1)

The creation of the Marketing Department and the appointment of Michael Payne clearly demonstrated the rising level of expertise and capacity with regards to Olympic

sponsorship within the IOC, and speak to the overall sophistication of Olympic sponsorship that took place during this period.

Why this change?

The sophistication of Olympic marketing which took place during the period between the 1984 Los Angeles Olympics and the 1996 Atlanta Olympic Games came about as a result of numerous factors; but two decisive influences or precipitators of change will be discussed; the increasing amount of money involved and the influence of sponsors. It is important to note, however, that events that took place in the previous period (Montreal to Los Angeles) may also have been key in creating the foundation for change during this period (Los Angeles to Atlanta), particularly the success of LAOOC sponsorship program and the discussed changing attitudes towards commercialization.

During this the period between Los Angeles and Atlanta, the first precipitator of change is argued to be the increasing amount of money involved with the Olympic Games. Although the IOC was more financially stable, the cost of hosting the Games, the value of television rights, and sponsorship all continued to drastically increase during this period; as a result, the IOC was forced to professionalize the ‘business’ of Olympic Sponsorship. With such large sums of money being requested and required, it became increasingly important for the IOC to develop and control the sponsorship environment in which it operated, while at the same time demonstrating to all stakeholders that it had the expertise and capacity to manage the task with a business-like approach. Similarly, in order to ensure the continued support of sponsors and therefore the continued financial viability of the Games, the IOC was required to meet the growing expectations of

sponsors with regards to ROI. Ultimately, big money equals big business, and the IOC was forced to increase the sophistication of its sponsorship program over a short period of time to meet the demands of an increasingly business-like approach.

The second decisive influence that helped bring about Olympic sponsorship sophistication was the influence of sponsors. Major long-term supporters of the Olympic Games, specifically Coca-Cola, actively encouraged the IOC to create a program that offered worldwide rights and implement a business structure to support it. Michael Payne (2006) noted that earlier “Gary Hite, Coke’s sports chief marketing chief at the time, explained to Samaranch that, although Coke believed in the Olympic movement and its marketing potential, the IOC had to find an easier way for companies to get involved (p. 79). As large global corporations, the ability to leverage an association with the Olympic Games in countries around the world would provide great value. However, the logistics of arranging permission to do so from each individual NOC was too complex and time consuming to be realistic. As a result, the sponsors were convinced the Olympic Movement was doing itself a disservice in not providing a global rights package. Furthermore, before the creation of the TOP program, it was oftentimes noted that many companies that had purchased the right to sponsor an OCOG were unaware of the territorial and category limitations of such support. The IOC and the OCOG were continually dealing with sponsors who overstepped their boundaries and stakeholders who were unhappy such incidents were occurring. It seemed such sponsors were unclear (or unwilling to understand) exactly what rights they were buying and the territory in which they could use them. One example is a series of letters between the IOC, and OCO’88 discussing concerns surrounding the ability of Air Canada to make claims about

their designations as an OCOG level partner that Federal Express felt to be infringing on their exclusivity as a TOP partner. Ultimately, these sponsor issues and concerns, in combination with other factors, were important in shaping the IOC's approach to the creation and sophistication of Olympic sponsorship.

Problematizing ambush marketing: Los Angeles 1984 – Atlanta 1996.

Alongside the sophistication of Olympic sponsorship, increasing attention was paid to what would become known as ambush marketing. In this section, the growth of ambush marketing that took place during this period is outlined. More specifically, the problematization of the practice, its status as a mostly opportunistic tactic, and the increasing reactive surveillance and enforcement that characterized this period is discussed below.

Problematizing ambush marketing.

Although it existed in some form prior to this period, the creation and control of the Olympic sponsorship environment also set the stage for the creation of a more open environment for ambush marketing. Those who were now in charge of sponsorship within the Olympic Movement began to focus on problematizing the practice. This meant the creation of definitions, naming the practice, and approaching it with the intent of placing it in a negative light (as an antithesis to the Olympic ideals and a morally unjust practice). In problematizing ambush marketing, the most important element was to outline for NOCs, bid cities, and OCOGs the dangers that the IOC felt ambush marketing created for the Movement and its sponsorship program. The arguments that it would create clutter in the sponsorship environment, create consumer confusion, and ultimately

dilute the value of sponsorship were highlighted in order to stress the importance of protecting the Games. Part of problematizing ambush marketing can be seen in the name itself. Although the practice has taken place in the past, it was typically examined in the context of counterfeiting or was discussed as an infringement. It was not until the late 1980s that the term ambush marketing, or parasite marketing in some cases, began to appear in the Olympic context. As late as 1988, there was no discussion of ambush marketing in the Calgary Final Report; however, the term had been coined and was seen in an academic publication in 1989 (Sandler & Shani, 1989) while the 1992 Manual for Candidate Cities discussed ambush marketing. In using such a name, there was an automatic connection to negative connotations that further reinforced the problematizing.

Opportunity.

During this time, it was evident from interviewees and in documentation that most ambush marketing campaigns were opportunistic. As one interviewee noted, however, such ambush was likely inevitable as “it would be like sitting there and watching Christmas happen and saying - let’s not bother doing a Christmas promotion this year” (OCOG2). Some examples included (1) the general increased presence of a company (e.g., more billboards) in the city hosting the Games, even if they did not indulge in Olympic themed advertising; (2) prior to the required joint marketing contract between the host NOC and the OCOG, there was prominent activation of the host country Olympic team sponsors; and (3) attempts to include oversized corporate identification on uniforms and equipment (athlete, coach etc.). The clear use of Olympic trade-marks and overtly strategic ambush marketing campaigns with a well-defined goal to undermine their competitors or confuse consumers were in the minority but it was during this period

that the problematization of ambush marketing began to take hold. As a result, attitudes towards perceived ambush, purposeful or not, were increasingly severe.

Surveillance and enforcement.

In dealing with the practice of ambush marketing, the strategies used during this period were mainly reactive. As the IOC was still learning about sponsorship, it was also learning about ambush marketing; as a result, it was playing catch-up with clever ambushers. In reactively dealing with ambush marketing, most of the strategies that existed during this time were linked to surveillance and enforcement. From a surveillance perspective, the main tactics involved the creation and deployment of venue management and control teams responsible for ensuring that all athletes, coaches, officials, and spectators were observing the clean venue guidelines. For instance, it was noted in the final report from Atlanta that by this time, surveillance was extensive with:

...A venue marketing team [...] at each of the 31 competition venues during every competitive session. Teams worked with security to prevent items from entering the venues, and with Venue management to ensure no orchestrated ambush activity occurred during the competitions. Such activity could potentially occur through numerous means such as flags, placards, visors, and seat cushions. (ACOG, 1997, p. 270)

From an enforcement perspective, it was also their responsibility to confiscate any such advertisements and/or ensure that they were appropriately covered or in some, more extreme, cases deny the potential ambusher access to the venue. Surveillance was also carried out through the media with the use of television broadcast monitoring. This tactic

involved organizers systematically scrutinizing multiple broadcast sources around the world to ensure no advertisements appeared which either infringed on Olympic trademarks or were felt to be so close as to potentially involve passing off or unfair competition offences. Reactive enforcement tactics during this period typically involved providing a warning that OCOGs hoped would make the ambushers think twice about their own approach. One such tactic was the use of letters from the legal departments of the OCOG and in some cases the IOC. These letters likely served to provide a first opportunity for an ambusher to back down by showing the lack of tolerance on behalf of organizers for such practices. In many cases, an opportunistic ambusher may not have even realized that what they were doing was wrong; this strategy acted as a method of information as well as enforcement. In addition to letters, personal contact was used in some cases to fight ambush marketing. In personally making the objections of the IOC and/or OCOG known to an ambushing corporation, it was hoped that a mutual understanding about the perceived dangers of such practices to the Olympic Movement would appeal to the 'ethics' of the organization and as a result they would stop what they were doing. In cases when an initial letter to marketing personnel had not been successful, this strategy seemed to be targeted towards marking the case at the executive level of the ambushing corporation, through a personal connection. Finally, the use of a technique called "naming and shaming" also became an important reactive technique for fighting ambush marketing. This involved the OCOG or IOC coming out in the media to place a negative spotlight on the ambusher by highlighting how their campaign was damaging the Olympic Movement in general and athletes more specifically. In his book

Inside the Olympics, IOC member Dick Pound (2004) recalled the story of such tactics being used against American Express. He wrote:

In 1992, I had personally ceased to use my American Express card for anything, but continued to carry it around with me and made it widely known that, if Amex undertook a single further ambush program I would call a news conference in front of whatever media we could attract (which, if we stated the purpose of the conference, would have been extensive), I would publically cut my card in half saying that I could not countenance doing business with an organization that was associating itself improperly with the Olympics but was doing nothing whatsoever to support either the organization of the Games or the athletes who were training for them. (p. 152)

It was hoped that such negative publicity or the threat of such publicity would be enough to have the ambusher cease their campaign.

While there was not a particularly proactive approach to fighting ambush marketing, expectations from this period showed that bidding cities were required to have a plan in place to deal with ambush marketing. It must be noted however that such plans were typically focused on legal protections for trade-marks and Clean Venue assurances. From a legal perspective at this time, the focus was on protection offered through already existing business law frameworks, such as trade-mark and copyright protection, passing off, and unfair competition.

Why this change?

The simplest, but most important, factor in the change to ambush marketing was the parallel evolution of sponsorship. As the value of Olympic sponsorship and the sophistication of the practice within the Olympic Movement increased, the number of companies who wanted to benefit from this association increased as well. The Games began to offer a commercial environment with a global reach, which was progressively harder to resist for both sponsors and competitors. For competitors, however, the increased cost of the Olympic sponsorship may not have always been viable, so ambush marketing was likely seen as a more feasible solution. Consequently, the IOC responded to the threat in order to ensure it was meeting the increased expectations of its partners, and maintaining its control of the Olympic sponsorship environment.

Secondly, the development of ambush marketing was partially a result of granting exclusivity to sponsors. In doing so, the IOC put itself in a position where it was required to recognize ambush marketing and face it head on in order to protect its sponsors. This left little choice for competing companies wishing to take advantage of the perceived opportunity resulting from hosting of the Games. Some Many make the argument that it is just good business sense for an organization to do whatever it feels it must, within the confines of the law, in order benefit their bottom-line, it is a duty to shareholders. Jerry Welsh, an executive with American Express during the 1980s was noted by Michael Payne (2006) to argue that:

There is a weak-minded view that competitors have a moral obligation to step back and allow an official sponsor to reap all the benefits from a special

event...they have not only a right, but an obligation to shareholders to take advantage of such events. All this talk about unethical ambushing is so much intellectual rubbish and posturing by people who are sloppy marketers. (p. 153)

Therefore, the very structure of the Olympic sponsorship program as well as its sophistication and success were the key forces in advancing the problematization of ambush marketing during this period.

The Olympic brand: Atlanta 1996 – Vancouver 2010.

The increasing sophistication of Olympic sponsorship and ambush marketing as outlined above continued to play a role in the changing Olympic marketing landscape, while at the same time facilitating the move into the next era of Olympic sponsorship in the years following Atlanta. The need for mutually beneficial relationships; the creation and control of the sponsorship environment; and the recognition and enhancement of expertise and capacity in the area of Olympic sponsorship were generally still part of the evolution of sponsorship. However, the most important advancement during this time was the emergence and development of branding principles and practices within the management of Olympic sponsorship. As will be discussed in the following section, the emergence and development of branding principles and practices was arguably most evident during this period through: the growing recognition of the Olympic Games as a brand generally; the increasing application of brand management as part of Olympic sponsorship; and the emergence of brand protection strategies beyond straightforward Olympic marks and emblem protection.

Brand recognition.

The recognition and understanding of the Olympic Games as being a brand⁵ was arguably a slow process for the IOC. This was not surprising given the organisation's initial reluctance to embrace commercialisation and its lack of knowledge and expertise in that area. By the Atlanta Games of 1996, discussions of the Olympic brand began to emerge. In fact, prior to this period, the concept of the Movement being a brand was a step too far for most; and it was argued that 'the Olympic Movement was not a brand' despite increasing commercialization. The continued evolution and sophistication of Olympic sponsorship and those involved in it began to require a more informed and realistic view of the Movement from a business perspective. As a result, explicit discussion and recognition of the Olympic Movement as a brand (the Olympic brand) began to take place.

As the IOC's comfort level with the idea of the Olympics as a brand began to increase, their comfort was reflected in their continued expansion of commercial activities and the supportive infrastructure to grow such activities. With regards to the Olympic brand, this was demonstrated in their move towards defining and understanding what the Olympic brand was and what it meant to consumers. This was first done through a fortuitous arrangement with VISA, whereby the IOC was able to take advantage of the opportunity to have a brand audit. The benefits of this were described by an interviewee as:

⁵ Please note that the Olympic Brand refers the brand elements of the larger Olympic Movement. However, when discussing a specific Olympic Games, it may also refer to specific Games brand elements that were created by OCOGs.

...An ability to articulate what the brand was and if you have that, it does two things: one is that it helps you when you approach a sponsor say, here is what we bring to the party and here's what we think an alignment with your brand would do and you try and make the case that the whole would be greater than the sum of the parts. That's on the positive. On the negative side, it tells you what kind of associations would not be good for your brand. (IOC1)

Following the basic brand audit, it was during this period that the IOC began to really invest in further Olympic brand research. Through the IOC's research, it sought to build a greater understanding of how Olympic stakeholders and consumers viewed its brand; results typically showed positive images and associations that could be leveraged to provide sponsors with added benefits and value. Multiple studies in countries across the world took place over the course of this period, each further informing the IOC and its partners and advancing its approach to sponsorship. During 1998-2000 for example, the IOC created the Olympic Image Research and Communications Project. The purpose of this project was to identify and promote the core attributes of the Olympic Image using qualitative and quantitative measures in up to 11 countries (IOC, 2000a). This type of brand-related research continued throughout this period (e.g., IOC 2006b; 2008a).

The recognition of the Olympic Games as a brand, as well as commissioning such brand research, demonstrated an explicit realization by the IOC that there is more to the value of the Olympic sponsorship than the tangible intellectual property. The images, identity, reputation, and associations made by consumers also contributed to the value of Olympic sponsorship; therefore, in order to make the TOP program as valuable and

prosperous as it can be, the IOC and OCOGs must understand and exploit the value of the intangible and tangible aspects of the Olympic brand.

Brand management.

Given the emergent brand recognition discussed in the above section, the management of the Olympic Games as a brand also became important. This was demonstrated in various ways, the first of which was the creation of independent marketing company by the IOC that would serve to meet its developing needs in this area. Despite the continued involvement of ISL and the development of an in-house Olympic marketing team, the IOC set up Meridian Management AG in 1996 to serve this purpose until 2004 when brand related matters became internal. While the two former organizations had managed the Olympic sponsorship program prior to 1996, the understanding of the Games as a brand required additional assistance. It was noted by a former Meridian executive that while ISL was a successful sponsorship selling and servicing organization, the purpose of Meridian was much broader and encompassed the creation of a full corporate marketing plan developed out of an understanding of the larger concept of the Olympic brand and the needs of sponsors. The interviewee noted:

...I think that was a huge change from the predecessor ISL that was basically a sales organization. We saw ourselves as a marketing organization. We literally tried to help sponsors, because I used to be the one to help sponsors understand the property, understand the IOC's marketing strategy, and help them get a return on that investment. So I think understanding the sponsorship, that sponsorship is not philanthropy, it is a cogent decision by a...usually a publically-traded company to

invest money into something to get a return on it and that we had a role in helping them do that. Up until those days, sponsorship wasn't really seen as anything other than, I don't know, almost patronage as opposed to an investment. And again, I think we brought distinct clarity to that and tried to develop tools, especially brand tool to help sponsors achieve those commercial goals, whatever they may be.

(AGN2)

As part of this larger understanding, Meridian was not just in charge of assisting in sponsorship sales, but rather, among other things, defining the Olympic brand, developing brand strategy, and conducting brand research in order to continue to grow and professionalize Olympic sponsorship. As noted by the Olympic Marketing Guide put out by the IOC marketing Commission in 1999, Meridian's job, among other things, was to "assist the IOC in the development and implementation of a strategic marketing plan." (p. 3.10)

A second demonstration of increasing brand management during this period was in the development of brand consistency through expanded sponsorship formalization. Slack and Parent (2006) described formalization as "the extent to which mechanisms such as rules and regulations, job descriptions, and policies and procedures govern the operation of a sport organization" (p. 67). In linking formalization to Olympic brand management, it can be argued that the practice helped the IOC monitor each OCOG from afar and ensure it lived up to the standards and needs of the Olympic brand. It allowed the IOC to have as much control as possible over its brand when the structure of the Olympic system depended on the IOCIOC entrusting it to various OCOGs who were acting as caretakers of the brand during the course of their existence. The increasing formalization

was demonstrated in a variety of ways. To begin, there were an increasing number of IOC requests that had to be completed and/or guaranteed by host cities in the bid phase with regards to marketing, sponsorship, and ambush marketing. Some of these included the further extension of joint marketing programs, preparing the Olympic sponsorship environment, and brand protection measures. For instance, the first inclusion of a required signed guarantee related to “legislation concerning ambush marketing” is noted in the *Manual for Candidate Cities for the XXI Olympic Winter Games 2010*. Another demonstration of formalization was in the proliferation of marketing, sponsorship, and brand-related job descriptions within OCOGs. The increased responsibilities of the OCOGs in these areas required more experienced, specifically assigned, and focused personnel to manage them. This was particularly visible in the organizational structure of the SLOC that had detailed and focused positions in these areas. For example, the SLOC had a brand protection function that included such jobs as Brand Protection Function Manager, Brand Protection Venue Area Managers, and Brand Protection Anti-Ambush Specialists (Volunteers) among others. Formalization was also apparent in the mounting documentation provided by the IOC and OCOGs as a guide for how things should or would be done. For example, the IOC published and distributed such documents as the *Ambush Prevention and Clean Venue Guidelines Manual (1999)*, and manuals pertaining to the Sponsor Presence and Sponsor Recognition Programs, while OCOGs created and disseminated documents such as *Protecting the Olympic Brand: The fight against ambush marketing (2001)* which was given to sponsors to explain how their rights were being protected by the SLOC.

A final example of the increasing importance of brand management in Olympic sponsorship between Atlanta 1996 and Vancouver 2010 can be identified in the direct links that emerged between the long-running Look of the Games Program and the Olympic brand. Previously, the Look of the Games was identified as serving the purpose of fostering a sense of celebration within the host city, and essentially turning the entire city into a host venue. Eventually, this was expanded to include sponsor marks and designations outside of actual competition venues as the sophistication of sponsorship programs and the expectations of sponsors grew. In this final phase, however, it was taken another step further; the Look of the Games served not only to enhance the festive atmosphere of the Games but also to project a consistent and coherent visual brand identity for the Games. Although in practice it can be argued that the Look of the Games had always accomplished this, it is the explicit discussion of the link between the Look of the Games and the overall Olympic brand that developed in this period. It became ever more important for the IOC and OCOGs to understand, emphasize, and support this link as part of a complete brand management strategy.

Brand protection.

The emergence of brand protection practices beyond straightforward Olympic marks and emblem protection was the final area of brand development that characterised this era of Olympic marketing, and a continued focus on this area is arguably where Olympic sponsorship currently finds itself. The general idea behind the concept of brand protection was not new prior to this period; rather, it was the link between protecting the integrity of the Olympic Movement and the concept of the Olympic brand, the expansion into dealing with issues related to ambush marketing, and the explicit naming of the

practice as brand protection which were new. During this period, brand protection evolved within the Olympic Movement as a two-pronged concept. The first related most specifically to the general idea of protecting both the tangible (i.e., words, symbols, the Olympic motto etc.) and intangible aspects (image, values, reputation etc.) of the Olympic brand. The protection of tangible aspects of the brand was clearly evident in the ever-increasing number of words, phrases, and marks to be protected, as well as the ever more severe and inflexible requirements expected of host and bid cities by the IOC in this area. Protection of the intangible aspects, however, was much more complicated. It was during this period that the IOC realized the actions of all those associated with the Movement would not just impact its integrity but also potentially the image and value of the brand. Through such means as the Olympic Charter and sponsorship contracts, the IOC had always tried to ensure that the actions of outside individuals involved with the Games were befitting of the ideals of the Movement, not for the commercial value of such behaviour, but for ideological reasons. However, as the commercial value of the Olympic Movement was highlighted, the IOC arguably realized that in protecting the image of the Movement, it was protecting its brand as well. It was especially important that the IOC monitored its own actions and the way it conducted its business with its stakeholders. As such, it would be held up to scrutiny. Therefore, the IOC members assume personal responsibility for protecting the brand. Also key was the recognition that over commercialization of the Games could be detrimental to the Olympic brand. Although, for the most part, the consuming public and Olympic family had embraced the relationship between the Olympic Movement and commercialism over the previous decade, such acceptance was still conditional on ensuring the ideological principles were

not overtly threatened or overshadowed by the involvement of commercial partners. As such, a vital part of protecting the commercial value of the Olympic brand became tied up in moderating the level of commercialization associated with it. This was forcefully brought to the attention of the IOC by Steve Jones (then head of marketing at Coca-Cola), who, when asked about the potential to allow sponsor signage on the Olympic field of play remarked: “if the IOC ever introduced Stadium Advertising, Coca-Cola would withdraw from their Olympic sponsorship as you would have fundamentally changed what made the Games so special” (Jones as cited in Payne, 2006, p. 144). He expanded on this by sending a letter to François Carrard (then Director General of the IOC) in 2000 in which he stated:

There is no valid loss of revenue argument when the risk is loss of brand equity. The Coca-Cola Company may be better known for field of play signage than any other company. We consider the signage and presence to be a core Coca-Cola equity. But I think that we (and other sponsors) derive more associative value with strong Olympic branding created by a clean field of play than we do sharing signage on the Olympic field of play. (Jones as cited in Payne, 2006, p. 162)

The second and interconnected area of brand protection that developed during this period was directly tied to the practice of ambush marketing. During the Salt Lake City Games, it was the Brand Protection Division that was responsible to prepare for, and deal with, incidents of ambush marketing. To this day, protection against ambush marketing has become linked to protecting the Olympic brand, and is increasingly sophisticated and strictly controlled. Further discussion of this element of brand protection will take place in the section below on the tactical sophistication of ambush marketing.

An interviewee described modern brand protection strategies as consisting of “distinctiveness, consumer acceptance, quality of the product or service, goodwill, institutional faith within the organization, creative promotion, and availability of legal remedies to prevent encroachment by third parties” (IOC1), thus providing an example of how those within the Olympic Movement view the concept of brand protection where both the general concept of brand protection and the ambush marketing specific aspects are recognized as important and dealt with in an ever increasing and formalized manner. As a result, the concept of brand protection has developed into arguably one of the most important issues within Olympic sponsorship.

Why this change?

Although the evolution of Olympic sponsorship is arguably built on the foundation of the changes that came before (i.e., shifting attitudes to commercialization and sponsorship sophistication), there are a few additional reasons, or events, that can be identified as also impacting the changes that took place during this period.

The increasing sophistication and knowledge of agencies, IOC marketing personnel, and sponsors all contributed to the emergence and development of branding principles and practices within the management of Olympic sponsorship. Sponsors who were increasingly concerned about their own brand management practices expected the same from the Olympic Movement, given that they were linking their carefully managed brand so closely with the Games’ brand. As described by an interviewee, sponsors began to make the argument to the IOC that:

[...] ‘Hey, you know, we are spending a quarter of a billion dollars every four years; you guys might want to give us some marketing plans because you guys might want to think about what your commercial platform is supposed to achieve, you might want to give us a promotional plan, we might want to understand what the brand is all about.’ And that really kind of had a lot to do with it in that time frame, with changing the IOC’s perspective and perception of what sponsors really need. (AGN2)

In developing Meridian Management and recruiting top professionals in the marketing and sponsorship field to join that organization, the IOC likely believed they would suitably advance their sponsorship program to the next level to meet these needs and expectations.

Another precipitating jolt of change is arguably the results of the 1996 brand audit and research on the public opinion of the Olympic Games. As one interviewee noted:

...Up until then, we had been working on kind of a wing and a prayer, in the sense that we think we know what we stand for, but we have no data whatsoever to know whether we are just breathing our own exhaust or whether the consuming public shares those views. (IOC1)

The research demonstrated that not only was there high level of interest in the Games and Olympic ring recognition globally, but also that the public had very strong positive opinions about the image and values of the Games. Given the enhanced expertise of those involved with Olympic marketing at this time, this likely signalled to them the value of the Olympic Games as a brand. As a result, they sought to align their strategy with brand

management principles (i.e., brand protection and growing brand equity) to ensure the greatest value for the Games and for sponsors.

From the brand management and protection perspectives, two key events arguably had the greatest influences on evolution in this area. The first was the 1996 Games in Atlanta that many people, rightly or wrongly, remember as the most over-commercialized Games in Olympic history. This was likely due to the actions of the City of Atlanta which took advantage of the Games being held in their city by selling vendor licenses to any company willing to pay for them, thereby turning public spaces into something resembling a trade fair. This was clearly noted by one interviewee who remarked:

...The big thing in Atlanta was that the city of Atlanta, not the Organizing Committee, not the Olympic people, but the city, turned the thing into a cheesy trade fair. I mean it looked like something out of a MASH set and it was tawdry.
(IOC1)

For this reason the need to closely manage the sponsorship environment and the Olympic brand resulted in the expansion of joint marketing agreements between host cities, host NOCs, and OCOG. From a brand protection perspective, the over-commercialization of Atlanta arguably threatened to harm the image of the Olympic Games and, therefore, the value of the Olympic brand. As a result, what happened in Atlanta served to reinforce the need to protect the Olympic Movement from over-commercialization as part of any brand protection strategy.

The Salt Lake City bid scandal was the second event that arguably impacted the changes that took place during this period. When it was discovered in late 1998 that

several IOC members had accepted bribes in exchange for their votes for Salt Lake to become the 2002 host city, it brought an unprecedented level of negative media scrutiny upon the IOC and its members. The reaction of sponsors was strong and swift. Some such as John Hancock, publically relayed their concerns to the IOC and went as far as threatening to withdraw their support. This event marked one of the first, and perhaps clearest indications that the actions of IOC members could damage the Olympic brand and consequently the commercial viability of the Olympic Movement. As one interviewee noted:

I certainly think the Salt Lake City bid scandal crisis in 1999 shocked the IOC into the realization that, you know, what they did, and what they did on a daily basis was interesting to the world and important to the world and that they frankly had a responsibility to conduct themselves in a fiduciary manner, as brand stewards, and I think that unfortunate exercise brought a lot of change into the organization. (AGN2)

It was the reaction of the public, media, and most importantly sponsors to this scandal that forced the IOC members to realize that an important part of protecting its brand was the ability of its members to regulate their own conduct and public image.

The sophistication of ambush marketing: Atlanta 1996 – Vancouver 2010.

Alongside the development of Olympic brand practices and principles during the time between Atlanta 1996 and Vancouver 2010, ambush marketing also continued to develop. This evolution can best be described as the sophistication of ambush marketing. The most notable aspects of change with regards to the sophistication of ambush

marketing were evidenced in the increasingly complexity of ambush marketing strategies and opportunities, the formalization of anti-ambush marketing strategies, and an increasingly proactive approach to fighting ambush marketing, most notably through education and legislation. Each of these aspects will be discussed in more detail below. It should be noted that, as ambush marketing became a mounting issue in Olympic sponsorship, the evolution of ambush marketing became increasingly entrenched in the general evolution of Olympic sponsorship. As a result, some of the practices and changes are noted in both the following section and the previous section on the Olympic brand.

Complexity.

While there can be no dispute that much ambush marketing during this period was still opportunistic, it can be argued that there was also an increasingly strategic approach for many large ambush campaigns. The increased complexity of ambush marketing was evident in the ways in which opportunities for ambushing were generated. In general, ambush marketing could be said to have gotten increasingly clever, subtle, and targeted. Part of this relates to the fact that, by this time, most purposeful ambushers really understood the value of using intangible brand associations to link themselves to the Games while not contravening laws protecting emblems, words, and other symbols, making it more difficult for OCOGs and the IOC to shut them down.

Another area where there was greater complexity was in the clear differentiation of product categories. The Olympic sponsorship program was built on the concept of product category exclusivity; but as many organizations began diversifying their businesses to cover additional product categories, the potential for ambush marketing in

this area increased. It became the case that a sponsor in one product category might also offer the products and services of another category where a competitor was a sponsor, thus increasing the complexity of managing the program and ensuring sponsor activations adhered to the boundaries of their own product category. For instance, one interviewee noted:

...You get into some funny things where you have like Panasonic that has, well you think Panasonic, Samsung and Bell, the Canadian example, it becomes very hard to understand where one sponsorship ends and another one starts. And as the lines get blurred between what the difference between a mobile device, what's a computer, what's a service provider it becomes, a) you have to think of your sponsorship very differently, now thank God I am in a very straight forward category, [...] but even then you can get into some funny discussions (SPO1).

Complexity was also evident in the complications created by the need to understand the realities of a local marketplace in managing and understanding ambush marketing. Local laws, expectations, belief systems and the business environment all impact how ambush marketing might be carried out, fought against, and perceived. The ability of the IOC and each OCOG to properly understand and adapt to these realities became a key part of anti-ambush program development.

The proliferation of digital media added great complexity to ambush marketing during this period. As sponsors gained a new platform through the Internet for activations and communications so too did ambushers. Websites, athlete blogs, social media sites and so forth expanded the area in which ambushers were able to create association

between themselves and the Olympic Games while also increasing their ability to directly engage consumers in interactive ambush marketing campaigns. Furthermore, the speed with which an ambush campaign can spread across the Internet is unparalleled when compared to traditional media. Even before those fighting ambush marketing become aware of a campaign's existence, it can potentially be seen by millions of people. Finally, like product category exclusivity, the distinct separation of national and international territories is a foundational component of the Olympic sponsorship program. TOP sponsors are the only sponsors who are given the right to advertise their association globally. The internet, however, has no such territorial boundaries, leaving open the opportunity for national and local sponsors and suppliers to leverage their association world-wide, consequently committing ambush marketing through over-extending their given rights.

The complexity created by the pace at which digital media changes the realities of the sponsorship environment also highlights a structural barrier within the Olympic sponsorship program that impacted its ability to evolve to fight ambush marketing. The general structure of the IOC, as well as their sponsorship program, is founded on the premise of long-term contracts. Host City Contracts are signed seven years in advance, and those guarantees that will be required are determined and presented even earlier. Similarly, joint marketing agreements are signed several years in advance, while TOP sponsorship agreements are signed for a four-year Olympic quadrennial. As a result, expectations and strategies laid out in such documents were often out-of-date by the time the Games arrived, limiting the value of such contractual agreements in entirely proactively protecting sponsors from the latest evolutions in ambush marketing.

Lastly, increasing complexity in ambush marketing was also partially brought about by the more detailed proactive approaches to education and legislation that will be discussed later. For this section, however, it is important to note that in creating laws and education programs that spell out exactly how ambush marketing will be interpreted and understood by an OCOG, such complexity may have aided in shrinking the amount of ‘grey-area’ that surrounded the practice in a given context. Although, it could be argued that this was a positive step, this also left open the opportunity for serious ambushers within big corporations to purposefully design programs with the advice of a legal team to ensure that it comes right to the edge of actionable. Though this did not protect such campaigns from reactive defense strategies like naming and shaming, it did allow them to approach the practice from a position of greater legal strength.

Formalization.

Like Olympic sponsorship, the fight against ambush marketing also became increasingly formalized during this period. As discussed above, there were an increasing number of manuals, guidelines, and rules that were developed in an effort to fight against the practice such as the aforementioned *Ambush Prevention and Clean Venue Guidelines Manual* and the requirement that bid cities guarantee the creation of anti-ambush marketing legislation that will be discussed in more detail later in this section.

There was also a vertical and horizontal fragmentation of responsibilities for managing ambush marketing within the Olympic Movement. It became the task of all Olympic marketing stakeholders to contribute to fighting and preventing the practice. From a horizontal perspective within OCOGs, although there was an increasingly focused

group that dealt with the practice, typically under the larger heading of marketing, the realities of fighting against ambush marketing meant there was a requirement for some level of ‘cross-functional integration.’ This refers to the fact that ambush marketing departments with an OCOG required assistance and knowledge from numerous other OCOG departments, for instance departments or divisions such as legal, broadcasting, public relations and volunteering. Such integration, however, provided some challenges for OCOGs, especially early in this period, as it was noted by the SLOC Brand Protection Team in the final report, that impressing upon other, non-related departments, the importance of brand protection practices was difficult at times. In the Salt Lake City Final Report under the heading of Issues and Challenges, it was noted that: “the main challenge initially was gaining internal support and cooperation on Brand Protection matters. Brand Protection was a small function often viewed internally as not being critical to the operation of the Games (SLOC, 2002, p. 484). The vertical fragmentation of ambush marketing responsibilities on the other hand consisted of the need for all external and internal members of the Olympic family to play a role in fighting against the practice. For example, sponsors needed to fully activate their rights and own the marketplace in order to help avoid consumer confusion and give ambushers little room in which to try and create a confusing association. Concurrently OCOGs created proactive and reactive programs of anti-ambush tactics, and through signing joint marketing agreements, OCOGs became responsible for negotiating and managing all sponsorship rights in their territory in the years leading up to and during the Games. While these are just a few examples of the responsibilities of various parties, it became obvious that the

formalization of roles and responsibilities for fighting ambush marketing applied to more than just the OCOG.

Not only was such quantity of documentation and the of job titles increasing, but also in their direct and explicit approach to ambush marketing and brand protection. This was further seen in the way the practice was discussed in final reports and bid documents, showing that it had become very much a part of the formalized dialogue and expectations surrounding Olympic sponsorship.

A proactive approach.

While this section primarily deals with the increased emergence of proactive approaches to fighting ambush marketing, it is important to recognize that reactive approaches still played an important role in anti-ambush tactics. One interviewee described the approach of an OCOG during this time as “being as proactive as you possibly can within the confines of the law...to be able to do that but at the same time taking a SWAT team like approach and being reactive whenever we heard of anything or they brought something to our attention” (OCOG1). During this period, the most important characteristics of reactive tactics were identified as the speed, power and aggressive nature of the response, and the expansion of the area that was closely monitored and controlled.

The ever more proactive approach to fighting ambush marketing during this period became a focus of Olympic anti-ambush marketing strategies and was demonstrated in several ways. The first was the evolution and expansion of anti-ambush marketing education programs. The programs began to expand in breadth, detail, and

importance. For instance, VANOC created an online brochure consisting of several fictional situations and showing potential ambushers exactly how they would view each in the context of their brand protection program and mandate. Other education strategies included brand protection staff giving talks to increase awareness and understanding on the topic and the IOC and OCOGs, taking out media advertisements to help form opinions and build knowledge on the issue and what is at stake. In addition to the expansion of education strategies, the number of stakeholders targeted by education programs also increased. Once again, using the example of VANOC, they created individualized programs to meet the specific needs of a large number of stakeholders. For instance, they had brochures targeted to such groups as the public, the corporate sector, and community groups. The purpose of these education programs was not only to act as a deterrent, but also to inform. Earlier in this chapter it was mentioned that many cases of ambush marketing are committed by organizations that do not realize that what they are doing is considered ambush marketing. In providing education to these groups, this kind of information contributed to limiting the risk of such an ambush occurring.

Linked to education was the increased recognition of the need for a balanced approach. Part of this balanced approach included ensuring the OCOGs and the IOC created and enforced ambush campaigns that took into consideration the desire of the community at large (the public and businesses) to engage in the Olympic Games. Not only was this their right as taxpayers in that city but also it was key to creating the festive and inclusive atmosphere that the Games seek to create. The need for balance was also linked to a need for proportional response. While different OCOG anti-ambush marketing frameworks may have defined what is allowed and what is not, the need to take into

consideration the level of harm being done by the ambusher in judging the appropriate response was chosen over a blanket approach where the same response fits all cases of ambush. As one interviewee explicitly noted: “you have to look behind what is intended and then balance. So balance what is proportionate in terms of how much damage is there potentially being done and how serious was this” (IOC 2).

A third aspect could be seen in the realization of the importance of managing expectations. As discussed earlier, the granting of exclusivity to Olympic sponsors might be viewed as a precipitating jolt for the evolution of ambush marketing; hence, protecting this exclusivity drove the need to fight ambush marketing. At this time however, there seemed to be an escalating understanding by OCOGs and the IOC that expectations with regards to the boundaries and limitations of exclusivity must be carefully managed. In previous years, one interviewee noted that perhaps OCOGs and the IOC had overpromised on the level to which they would be able to enforce exclusivity:

I think over the years the industry has tended to...not overpromise...yes I guess it is overpromise to some extent by implication, overpromise on what exclusivity means, you know you sit there and say and your relationship to this event will be completely exclusive so in the minds of the buyer, if you take those words at face value, their company will be the only one in its product category who has absolutely anything to do with the [it] which of course is absurd in the real world, but it starts with that position. (AGN1)

However, the importance of defining what exclusivity realistically meant and the extent to which it was something that was entirely protectable had become part of a proactive

approach to meeting sponsor expectations with regards to ambush protection. The management of expectations required an increasing capacity towards communication, dialogue, and honesty between OCOGs, the IOC, and their sponsors. It was noted that the approach of “under promising and over-delivering” (OCOG1) was a key in managing such expectations.

Finally, and most importantly, the creation of brand protection through legislation that specifically deals with the practice of ambush marketing, rather than just straightforward marks protection, was an important example of the evolution of proactive ambush protections, as well as the importance placed on the issue. Prior to this period, the need to deal with ambush marketing was acknowledged and accomplished; but following the lead of the Sydney Games and then Salt Lake City, which the IOC identified as “establish[ing] a benchmark for protecting the Olympic image and the rights of partners” (IOC, 2012b), the use of legislation began to attempt to specifically cover broader ambush activities. The clearest example of the developing expectations in this area can be seen in the evolution of the guarantee files related to bidding for the Games. Potential host cities had long been asked in their bid books to “describe the measures in force on the basis of which preventative steps can be taken against ambush marketing” (IOC, 1994, p. 40) and provide a government guarantee that “if not already protected [...] it will obtain adequate and continuing legal protection for the Olympic symbol, the terms Olympic and Olympiad and the Olympic motto to the satisfaction of the IOC” (IOC 1994, p.39). Following the 2000 Sydney Games, a description of the steps to be taken against ambush marketing was no longer enough. At this point, bid cities were now required to provide a guarantee from “competent authorities” (IOC, 2000b, p. 125) on the

subject of the creation of legislation concerning ambush marketing. By 2004 in the bids for the 2012 Olympic Games, relevant government authorities in each potential host country were required to supply a guarantee stating “Guarantee(s) confirming that the legislation necessary to effectively reduce and sanction ambush marketing, eliminate street vending, control advertising space and air space during the period of the Olympic Winter Games, will be passed no later than 1 January 2012” (IOC, 2004, p. 251). As part of the move towards ambush marketing specific legislation some important changes appeared. At a basic level, the number of words, phrases, pictures, etc. that fell under such protections, greatly increased and became broader. For instance, OPMA (2007) protected against the use of such words and phrases such as Games City, Vancouver, 2012, gold, and medal in specific contexts and combinations. Another element of ambush marketing specific legislation was the need to legislate for immediate injunctive relief. This meant creating the ability to stop the alleged ambush marketing campaign before a full trial determined the facts of the case. This speaks to the need for a quick and powerful reactive strategy that was discussed earlier in this section. Finally, the move towards including legislative protection that covers intangible brand elements (i.e., associations) in addition to the tangible (i.e., words marks, etc.) was also identified as part of anti-ambush specific laws during this period. The London Olympic Association Right (LOAR), which was discussed in the review of literature, provides an example of this evolution.

Why this change?

As previously noted, the simplest factor leading to changes in ambush marketing during this period was the parallel evolution of sponsorship. For instance, as sponsorship

formalization increased in response to a growing need for brand consistency, so too did the formalization of methods and structures for protecting the Olympic Games from ambush marketing as a part of the more general change to sponsorship. Similarly, as brand protection practices became a key area of Olympic sponsorship, it precipitated an increasing interest in, and understanding of, ambush marketing, and highlighted the importance of a proactive approach as well as the need for increasingly rigid structures and guidelines through formalization.

In a similar fashion to how the evolution of ambush marketing is impacted by the evolution of sponsorship, the general tactical sophistication of those fighting against ambush marketing evolved in response to the tactical sophistication of ambushers and vice versa. As more proactive and stronger reactive measures were developed by the IOC to fight ambush marketing, the ambushers continued to evolve their own strategies that circumvented or find a loophole in such measures. The cycle is then perpetuated with the next changes to anti-ambush tactics reflecting the need close the exploited loopholes.

Finally, the increasing expectations of sponsors have had a large impact on the way in which anti-ambush marketing programs have evolved. It was noted by a sponsor that:

As investment levels go up, your expectations go up in terms of the legal framework and the framework of the contracts ...the lack of protection may make a difference to the value of the property long term. In other words, without that protection it would be very hard for the IOC to say ok you are going to sign for the

next 20 years, a sponsor like us would come back and say, yes but the value has just gone down if you can't protect us. (SPO1)

This quote clearly indicates that the expectations of sponsors with regards to protection, specifically in a legal framework, were directly tied to their valuation of the property. As a result, the increasing breadth of, and obligations for, anti-ambush marketing legislation developed, at least partially, out of a need to meet these expectations to ensure the financial stability of the Movement. Once again, however, this relationship can be described as cyclical. As the protections offered by an individual OCOG became more encompassing, the expectations of sponsors also increased. For instance, the development of required guarantees for ambush marketing specific legislation arguably grew out of increased sponsor expectations developed by the comprehensive brand protection programs and legal frameworks of Sydney and Salt Lake City.

The institutionalization of brand protection.

Given the above results, it can be argued that the evolution of sponsorship and ambush marketing within the Olympic Movement demonstrates a trend of dynamic and ongoing institutional processes and institutional states. In the context of this study, institutionalization refers to certain practices becoming a taken for granted part of actions and strategies within the field of Olympic sponsorship and ambush marketing. Although it will be argued later in this section that the current outcome is the institutionalization of legislated brand protection within the Olympic Movement, it is important to note that such a state has been built on a foundation of varying institutional elements as identified within the above discussion. Throughout the three periods of evolution identified in this study (i.e. the development of the Olympic property, the sophistication of Olympic

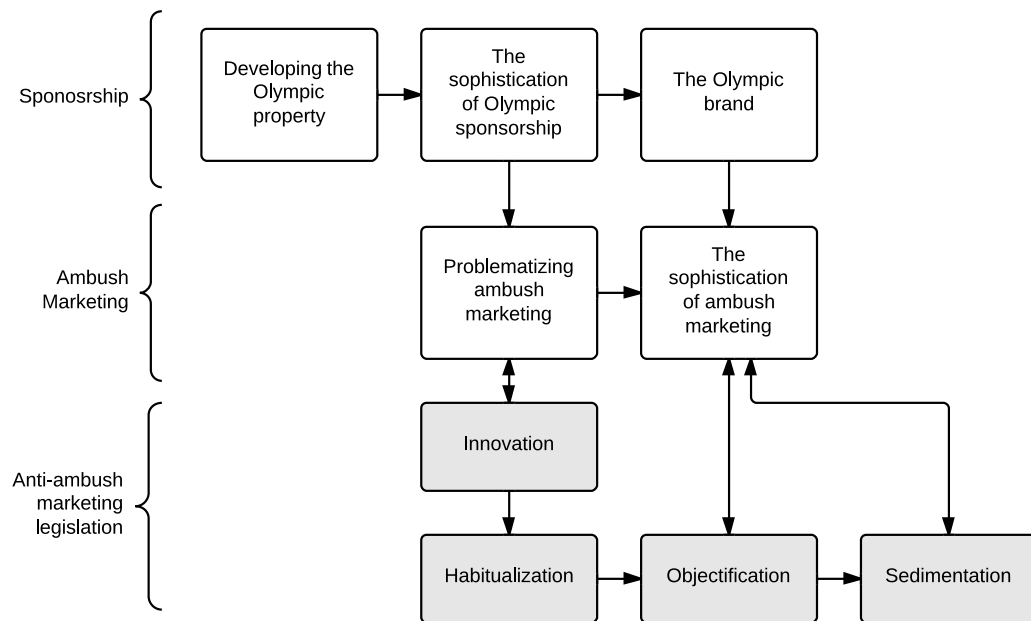
sponsorship and the development of the Olympic brand), the Olympic movement became “big business”, and the concepts of commercialization and sponsorship became taken for granted norms or institutionalized practices. This is demonstrated in the fact that despite protests by some key figures in the Olympic Movement, sponsorship practices evolved to become increasingly sophisticated and structured as evidenced through the increasing formalization and standardization of strategies and expectations.

Institutional theorists argue that organizations adhere to institutional practices in an attempt to seek legitimacy and ultimately survival within their organizational field (Meyer & Rowan, 1977). From the perspective of the IOC and the Olympic Movement as a whole, this is evident in the way in which a previously closed organization felt compelled to open itself to the sponsorship knowledge of the outside world through the use of agencies and the input of sponsors, and therefore develop and enforce a more structured and institutionalized program from Games to Games. This assisted the IOC in ensuring the survival of the Movement and the overall legitimacy of their organization and its sponsorship program among the world of “big business”. Similarly, OCOGs conformed to the institutionalization sponsorship structures of the IOC in order to attain legitimacy from this organization and the Olympic family. It can also be argued that the search for legitimacy within OCOGs started as early as the bid phase with many guarantees (i.e., clean venue promises, joint marketing agreements, etc.) being made to meet or exceed institutional expectations in order to ensure a bid committee’s survival as an eventual OCOG.

Within this study, the most interesting and pertinent area that demonstrates the trend of institutionalization is anti-ambush marketing legislation. As the above results

section indicates, the most recent evolution of Olympic sponsorship and ambush marketing has focused on the development, promotion, and protection of the Olympic brand. From an ambush marketing perspective, the move towards legislated forms of anti-ambush marketing protection has been a key development. Its move from added value feature to required expectation provides a clear example of the process of institutionalization unfolding within Olympic sponsorship and ambush marketing. This process of institutionalization can be best understood using Tolbert and Zucker's (1996) framework describing the movement from pre-institutionalization to semi-institutionalization and finally to full institutionalization of a practice as described in Chapter Three. A basic visual representation of this process as it relates to this study is outlined in Figure 5-1 and explained in this section.

FIGURE 5-1. The Institutionalization of Anti-Ambush Marketing Legislation



Pre-institutionalization.

In the pre-institutionalization stage, the processes of innovation and habitualization are evident. The increasing spread of ambush marketing and recognition of its potential dangers, which began during the sophistication phase of Olympic sponsorship and continued to expand into the Olympic brand development phase, provided the required market forces to initiate innovations of various methods for fighting and preventing the practice. One such innovation was the creation of specific legislative provisions to protect from ambush marketing in addition to the already established laws to protect Olympic intellectual property and the existing legal measures which might be applied to issues of ambush marketing (i.e., passing off, unfair competition). Following the initial unsolicited innovation of such specific legislation in Australia for the 2000 Sydney Olympic Games, the practice began to develop towards what Tolbert and Zucker (1996) described as habitualization or patterned problem solving behaviour. For instance, such an approach was not mandated or argued to be an absolute necessity by the IOC; in fact, such measures seemed to be taken merely as a precaution given that ambush marketing had previously presented few problems. Despite such sentiments, imitation was evident in the approach of Salt Lake City, the next host city, which amended existing legislation to include more specific anti-ambush marketing measures, and candidate cities, some of which began to include planning for such measures among their candidature files as a key element in their marketing and pro-active brand protection strategies. As a result, although certainly encouraged by the IOC at this point, the choice to enact such legislation was largely an independent decision on behalf of the individual OCOG or bid committee to go to such lengths.

Semi-institutionalization.

The practice of developing anti-ambush marketing legislation quickly moved into a semi-institutionalized stage, which lasted approximately from the end of Atlanta Games in 1996 up to, but not including, the Vancouver Bid in 2002. In line with Tolbert and Zucker's (1996) framework, this phase was evident through the process of objectification facilitated by both inter-organization monitoring and theorization.

Inter-organization monitoring, or in this case inter-Movement monitoring, involved new bid cities recognizing the success of previous bids that promised anti-ambush legislation, as well as the positive response of the IOC to such efforts being promised in bids and/or enacted by host cities (i.e., Sydney). This facilitated an easier adoption of similar practices by new bid committees and eventual OCOGs in an effort to reap the same rewards through 'recycling' or imitating perceived successful structures. Inter-organization monitoring and competitiveness are arguably particularly significant in the context of the Olympic Games. Bid cities are constantly examining previously successful OCOG and bid committee practices to aid in developing the most competitive and attractive management structures in an effort to win the ultimate prize of being named as a host city. The sense of competitiveness, and therefore likelihood for movement towards objectification, should consequently be enhanced given that each bid organization is fighting for its very existence as an OCOG.

At the same time, as inter-organization monitoring was affecting practices, the general evolution of Olympic sponsorship was realizing Tolbert and Zucker's (1996) two tasks of theorization: explicitly defining the problem of ambush marketing, and beginning to justify anti-ambush marketing legislation as an appropriate solution. The definition of

the problem of ambush marketing during this time was evident in the ever increasing recognition of the IOC, sponsors, and OCOGs that ambush marketing was in fact a major issue with regards to overall brand protection. This came about as a result of several factors including the Olympic brand audit and the aftermath of ambush marketing at the Atlanta Games. The most overt and public indication of the IOC's definition of ambush marketing as a major threat for the Olympic Movement could be seen in an article written by the then Director of Marketing for the IOC, Michael Payne. Printed in an academic journal in 1998, his article titled *Ambush Marketing: The Undeserved Advantage* clearly portrayed the IOC's definition of ambush marketing as an acute problem for Olympic sponsorship, and a threat to the Movement as a whole. The second task of theorization, justifying anti-ambush marketing legislation as an appropriate solution, was linked to the IOC's message of the potential dangers of ambush marketing to the Olympic Movement and the Olympic brand. It was the IOC's argument that if it could not adequately protect the rights of their sponsors, it would not be able to demand premium prices for sponsorship rights. As Michael Payne (2006) argued:

The Olympic Movement survives in large part because of its value proposition and the financial support it receives from the business community. If the IOC did not robustly defend that value proposition or the exclusive rights of its partners, there would be no basis or logic for anyone to invest in or become a partner. (p. 142)

As the value of the TOP program and the cost of staging the Games continued to grow so too did the IOC and OCOG's dependence on sponsorship monies. With this in mind, the justification for anti-ambush marketing legislation was the need to adequately protect

sponsors. Specifically, such exceptional measures were argued to be the best way to protect Olympic sponsorship in response to the need to keep up with the increasing tactical sophistication of ambushers, protect the more intangible elements of Olympic associations, and to answer a need to move towards proactive strategies rather than merely reactive strategies. It can be argued that a perceived lack of major ambush marketing damage in Sydney and Salt Lake City may have been used as justification for the argument that such measures were effective, despite the difficulties of attribution given the additional measures also undertaken to fight ambush marketing.

Facilitated by inter-organizational monitoring and theorization, the process of objectification drove anti-ambush marketing towards the stage of a semi-institutionalized practice. The justification of the practice as outlined above demonstrated a degree of consensus among decision makers (i.e., IOC, sponsors, OCOGs) about the value of the structure (Tolbert & Zucker, 1996). This was shown in the increasing importance and attention the subject was given and the more specific and encompassing expectations in this area (i.e., in the bid phase). As expected during the objectification process, the implementation or promise of anti-ambush marketing legislation became more widespread and permanent with all host cities providing some measure of enhanced legislation directly addressing issues related to ambush marketing, and all bid cities promising they too would do so if selected. However, although such a response was highly advised by the IOC, it was not yet an explicit requirement necessitating a guarantee in the bidding stage. As a result, though there was a move from imitation as the main impetus for the enactment of such anti-ambush marketing legislation, the evolution to a fully normative practice was not yet complete.

Full institutionalization.

The use of anti-ambush marketing legislation as a key form of Olympic sponsorship protection arguably entered the stage of full institutionalization in the early part of the 2000s and continues in this state to the present. In alignment with Tolbert and Zucker's (1996) model, the move into this stage manifest through the process of sedimentation. Progression to this stage was aided by a suitable alignment of the circumstances that Tolbert and Zucker noted as key factors affecting the diffusion of a structure and therefore a move from the process of objectification to sedimentation. As discussed above, in outlining the justification for such measures, there was a continued belief among Olympic marketing stakeholders of the positive relationship between the anti-ambush marketing legislation and its desired results (i.e., actively and reactively fighting against ambush marketing). As a result of these beliefs, stakeholders such as sponsors and the IOC, essentially acting as Tolbert and Zucker's advocacy groups, provided the required support and promotion for the continuation of such measures. Finally, there was little, if any, resistance and questioning of such measures evident within the Olympic Movement or among external groups, such as the governments or the general public.

This combination of factors was vital in allowing for the sedimentation process to occur and drive the practice of anti-ambush marketing legislation towards full institutionalization. Beginning with bids for the 2010 Winter Olympic Games, there was a move by the IOC to require bid cities to provide a signed guarantee from their government that anti-ambush marketing legislation would be enacted in the event they were chosen to host the Games. This led to a complete diffusion of the practice among all

OCOG's which demonstrated that the practice had met the requirement of width that Tolbert and Zucker (1996) argue is a fundamental characteristic of the process of sedimentation. The second fundamental characteristic of the process of sedimentation is depth that suggests the survival of the anti-ambush marketing legislations across numerous generations. While this measurement taken with regards to temporal measurement (i.e., number of years) is perhaps not overly suggestive of its long-term existence, the argument can be made that each bid committee is representative of a new generation of the Olympic Movement. As such, the practice had already survived across five generations before the 2002 bids for the Winter Olympic Games in 2010. Given this understanding of depth, it is apparent that the use of specific legislation as a strategy for fighting and preventing ambush marketing demonstrated the sedimentation process key characteristics of width and depth. As a result, the practice moved into the fully institutionalized stage demonstrating the quality of exteriority and a normative impetus for adoption.

Reflections on institutional theory.

The above examination of the institutionalization of Olympic anti-ambush marketing legislation using Tolbert and Zucker's (1996) model provides two key areas of reflection regarding this framework and institutionalization in the context of the Olympic Movement: (1) the concept of depth and (2) variances in implementation.

The Concept of Depth.

Within the context of the process of institutionalization as outlined by Tolbert and Zucker (1996), the idea of depth is a key characteristic of sedimentation that is linked to

the concept of time. The concept of time in a very general sense has long been identified as requiring special consideration in the context of temporary organizations (e.g., Lundin & Söderholm, 1995; Porsander, 2000), that is, those organizations that have a fixed and pre-determined lifespan (Parent, 2005) as is the case for individual OCOGs despite the permanence of the Olympic Movement. It was noted that if the measurement of depth is taken purely with regards to temporal measurement (i.e., number of years), it is perhaps not overly suggestive of long-term existence of a structure with the Movement. The argument can be made, however, that each bid committee is representative of a new generation of the Olympic Movement, and as such, a measurement of depth taken purely with regards to such generations (defined as OCOGs) and outside, or in combination with, physical time (as was the case in the above discussion) would be more representative. While Tolbert and Zucker define depth with regards to generation, its interconnection to extended physical time is implicit. This suggests that in examining the process of institutionalization within temporary organizations, perhaps a more specific definition of the notion of depth, with regards to the diffusion of a practice, is required which overtly recognizes a potential disconnect between the conceptualization of a generation and physical time. A temporary organization in the form of an OCOG arguably offers a microcosm of the entire lifecycle of an enduring organization; as such, the conceptualization of time-based considerations within organization theory used to examine temporary organizations should reflect this.

Variances in implementation.

The second area of reflection within institutional theory is related to understandings of the level of variance in implementation of institutional norms within

organizations. Tolbert and Zucker (1996) stated that, when a practice becomes institutionalized, the amount of variance in implementation among individual organizations within the field is low; that is, each organization's application of the practice is very similar to every other organization. Like the concept of depth, this study suggests that perhaps the understanding of variance in implementation is more complicated within the context of temporary (Olympic) organizations. Results suggest that, at a macro level, the variance is indeed low as suggested by Tolbert and Zucker. For the last 10 years, all OCOGs and their country's governments have, without question, guaranteed in the bid phase that they will introduce specific legislation as a key strategy in fighting ambush marketing, and all have followed through with those promises when selected. This demonstrates that the practice of using such legislation in the Olympic Movement is fully institutionalized with minimal, if any, variance in implementation at the level of the Olympic Movement (i.e., macro level).

It can also be argued that, at the macro level, the use of such minimally variant practices is perhaps even more important within temporary Olympic organizations. OCOGs essentially begin from a bare bones framework, and must develop their structure and practices from the example of those that existed before them and the direction of the IOC. As temporary organizations, they also have exaggerated time constraints under which they must develop their structures and practices in a way that gains legitimacy and allows for a successful Olympic Games. Therefore, it can be suggested that institutionalized norms are the understandable best choice for developing new structures as they provide a labour effective and time efficient way to adopt new structures based on those which are already socially accepted as leading to the required positive outcomes

(i.e., institutionalized). In an organization that has limited time to develop from nothing and will disappear after the Games (i.e., limited time to create a structure, attain legitimacy, and be successful), such shortcuts are seemingly necessary. Dacin (1997) found that institutions are particularly important in organizations at the time of founding, as the “conformity to norms takes on greater significance when establishing the legitimacy of non-existent organizations” (p. 74). Given that OCOGs start as non-existent organizations, and the fact that they are constrained by a shortened lifecycle in which the need to gain legitimacy is required even before the formalization of the organization (i.e., in the bid phase), this would seem particularly pertinent to temporary Olympic organizations. In the case of anti-ambush marketing legislation, the normative nature of the practice means that from its founding, the OCOG already has a clear foundation for how it will be able to protect the Olympic brand and the individual Games brand and the investment of sponsors. Macro-level institutions can therefore be understood as valuable tools that aid OCOGs in achieving legitimacy and success under unique constraints.

On the other hand, what can be termed the micro-dynamics of the institutionalized practice (Weber & Dacin, 2011) at an OCOG level demonstrates much more variance. That is to say that while the practice of promising and enacting specific anti-ambush legislation has become an institutionalized practice within the Olympic movement, the way in which this is done at an OCOG level sees a higher level of variance in implementation than might be expected. This can potentially be explained by the importance of two key considerations of temporary Olympic organizations: (1) competition, and (2) culture.

Competition.

Each OCOG is selected as a host city through a bidding process in which a certain level of competitiveness is enhanced by the fact that each bid organization is fighting for its very existence as an OCOG. Arguably, such extreme competitiveness has an impact on the variance in implementation of institutionalized practices at the micro-level. While the use of legislation as a key measure to fight ambush marketing has become institutionalized within the Olympic Movement, the understanding, breadth, and structure (i.e., micro-dynamics) of such measures varies between many OCOGs. Part of this variance can be understood as developing out of the competitive nature of the bid process. Each bid committee wants to ensure that it offers the IOC the best and most attractive options, so although all bids contain guarantees for the normative practice of legislating against ambush marketing, increasingly sophisticated levels of legislative protections are outlined to set bids apart from each other. Thus, when a host city is selected, it will adopt the macro-level normative structure of anti-ambush marketing legislation, but there will likely be greater variation in the micro-dynamics (i.e., breath, structure, form) of the institutionalized practice based on the specific promises they made in the bid phase. As a result, though an institutionalized practice provides an important framework for a new structure like an OCOG, the competitive nature of temporary Olympic organizations means, at the level of the institutional micro-dynamics at least, the level of variance is greater than suggested by Tolbert and Zucker (1996).

Culture.

By nature, every Olympic Games forms and operates within the context of a different set of national cultural values and understandings. This study suggests that even within an institutionalized practice such as anti-ambush marketing legislation, culture may partially explain greater variance in the implementation of institutional micro-dynamics at the OCOG level. Since the institutionalization of the practice, all OCOGs have passed legislation that explicitly provides protection against ambush marketing; but variance in such legislation at a micro level in accordance with cultural conditions is demonstrated in a variety of ways. For instance, the cultural beliefs, perceptions, and expectations about the concept of ambush marketing (e.g., Preuss, Gemeinder & Séguin, 2008) might impact the way infringements are defined and evaluated, while government powers and legislative frameworks may limit or expand the breadth of protections, potential remedies, and involved stakeholders. Such an understanding of the role of culture is supported by Weber and Dacin (2011) who recently emphasized the “cultural construction of organizational life” (p. 287) as a key area of study within organization theory. Most relevantly, they noted that: “a more nuanced focus on the micro-dynamics of institutions will yield rich insights for culture and its role in institutional creation, maintenance and change” (p. 295). The present study supports this by highlighting the interaction between culture, institutional micro-dynamics, and the variance in implementation of institutionalized structures. Thus, in the context of Tolbert and Zucker’s (1996) framework, culture is presented as a potential modifier of the suggested low level of variance of implementation within fully institutionalized practices.

Overall, the above reflections demonstrate that within temporary Olympic organizations, the level of variation in implementation of an institutionalized practice may be increasingly moderated by such factors as competition and culture at the micro-level (i.e., OCOG) while continuing to experience low variance in implementation at the macro-level (i.e., Olympic Movement). This suggests that recognition of the need for distinctions between the macro and micro level institutional processes in temporary Olympic organizations with regards to variance in implementation is important and should be considered. Future research should expand this line of inquiry, particularly as it interacts with the concepts of isomorphism and legitimacy.

Reflections on literature.

The above discussion expands our understanding of how and why Olympic sponsorship and ambush marketing have evolved in the modern era of commercial growth. It examines both the individual evolution of Olympic sponsorship and ambush marketing and how their interaction with each other influenced their development. In examining the results with regards to the literature in the field, these findings are largely supportive and reflective of the themes, trends, and perceptions of literature and practice in these areas. Additionally, there are some key areas where this study adds insight, such as the incorporation of the evolution of ambush marketing and a developed understanding of the importance of exclusivity as well as presenting a way forward in research given the suggested institutionalization of anti-ambush marketing legislation. These will be discussed below.

The evolution of ambush marketing.

One key area of differentiation between this study and previous literature is the incorporation of an examination of the parallel evolution of sponsorship and ambush marketing. While a call for such an examination was made (Barney, Wenn, & Martyn, 2004) and the subject has been discussed in passing within other studies of Olympic sponsorship evolution (i.e., Barney et al., 2004; Giannoulakis et al., 2008), the present study offers a more comprehensive look at the evolution of ambush marketing as a key part of Olympic sponsorship. When examining the phases of ambush marketing evolution as they correspond and interact with the evolution of sponsorship, it becomes obvious that the factors that make Olympic sponsorship programs a success are also those that create an environment that nourishes and promotes ambush marketing. At the same time, the evolution of ambush marketing forced changes in the evolution of sponsorship with a need for greater control, increasing complexity and formalization resulting from the fight against ambush marketing. One of the key areas argued to be important in both the evolution of ambush marketing and sponsorship in the Olympic Movement was exclusivity.

Exclusivity.

The role of exclusivity is a founding principle and key element in the value for Olympic TOP sponsorship suggests its importance in shaping the evolution of related practices. The development of worldwide exclusivity meant that the IOC was able to both create and control the sponsorship environment in which their brand would be used, offering the chance, in theory at least, to control clutter by limiting the number of

available opportunities. In providing exclusivity, the IOC was also able to provide greater value for its corporate partners through the scarcity and global reach of official partnership. However, in doing so, it also created a sponsorship environment that fostered and encouraged the development of ambush marketing by limiting access to a valuable and powerful property. It is an interesting paradox that, by using exclusivity to create value in the Olympic property, the IOC also created a threat to that value which would bring about the need to create programs to protect exclusivity at all costs. Further along in the development of sponsorship and ambush marketing, exclusivity continued to have an impact via the increasing complexity involved with clearly demarcating product categories. As the large, often multi-national, companies who tend to be Olympic sponsors continue to broaden the scope of their industries, it became more difficult to separate them into clearly delineated product groupings, confusing the marketplace even further and adding other sponsors to the list of organizations who represented potential ambushers. Lastly, in more recent considerations of ambush marketing, exclusivity has become key in proactively managing the potential damage of the practice. This is evident in the suggestion that the expectations of sponsors in this regard must be carefully managed. That is to say, an OCOG or the IOC must be upfront and open with sponsors about exactly what they are able to accomplish in this area, ensuring there are realistic expectations for the level of ambush marketing protection and surveillance the property owners are capable of.

Moving research forward.

Given the suggested understanding of anti-ambush marketing legislation as an institutionalized practice, there are several pertinent issues that arise and should be

considered going forward. There have been a growing number of articles that examine the subject of such legal protections. In fact, it was noted in the literature review that, in recent years, the majority of articles on ambush marketing have related directly to the use of legislation (e.g., Ellis et al., 2011a; Grady et al., 2010; Palomba, 2010; Scassa 2011). The institutionalization of ambush marketing legislation suggests that it will continue to be implemented on the basis of its status as a taken-for-granted norm of the field that provides sought-after legitimacy. However, the argument can be made that the institutionalization of the anti-ambush marketing legislation does not preclude continuing questioning about its true value and the perception that it is automatically a good thing. Going forward, this study suggests that providing an understanding of the exact value, if any, of anti-ambush marketing in fighting against ambushers will be an important research objective from a practical and academic point-of-view. Furthermore, with regards to the assumption of its merit, on-going research should continue to question the practice rather than join the taken-for granted assumption that it is a good thing.

Chapter 6: Study II - Network Structures and Knowledge Transfer in Olympic Ambush Marketing

Results and Discussion

There has been increasing call for the use of network theory within the field of sport management generally and sponsorship more specifically (Olkkonen, 2001; Walliser, 2003; Wolfe, Meenaghan & O'Sullivan, 1997/98). In this study, there is a move towards that goal through an examination of the Olympic ambush marketing network and its potential impact on stakeholder influence. Overall, this study examines how Olympic ambush marketing stakeholder power and transfer of sponsorship and ambush marketing knowledge may have influenced institutional processes toward the state of anti-ambush legislation as institutionalized brand protection. This is addressed by examining the following research questions: (1) How does network positioning impact stakeholder power among Olympic ambush marketing stakeholders?; (2) How does sponsorship and ambush marketing knowledge travel across the Olympic marketing network? And; (3) How has this influenced Olympic sponsorship practice most notably related to ambush marketing institutionalization processes? The following sections will examine the Olympic ambush marketing network, the transfer of Olympic ambush marketing knowledge and networks, knowledge transfer, and institutional processes.

The Olympic ambush marketing network.

As noted by Wasserman and Faust (1994) “the restriction to a *finite* set or sets of actors is an analytic requirement [of network analysis]. Though one could conceive of ties extending among actors in a nearly infinite group of actors, one would have great

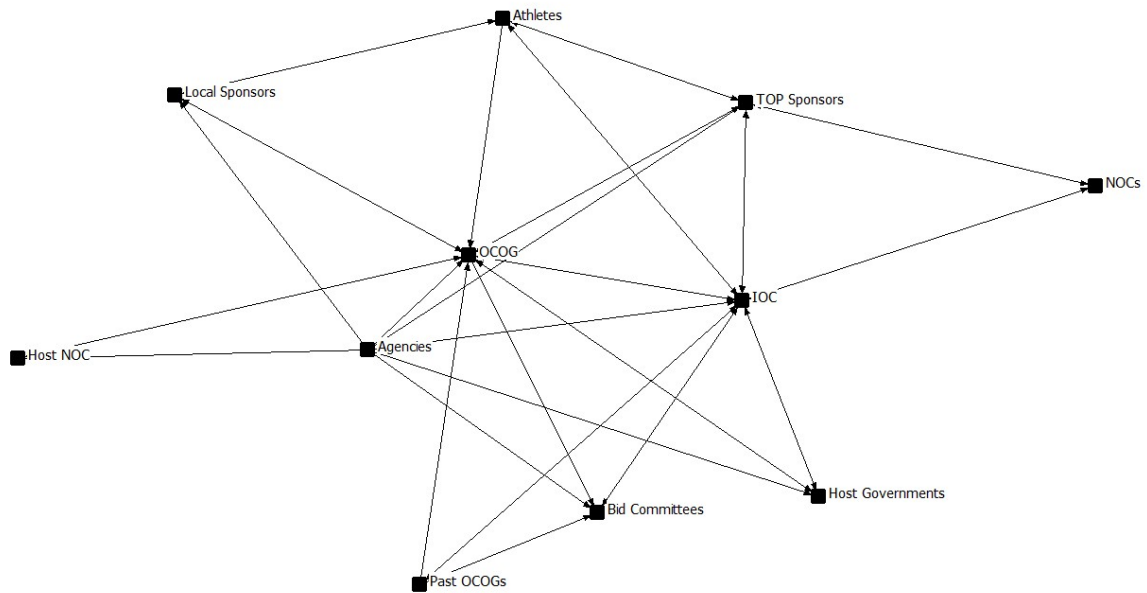
difficulty analyzing data on such a network” (pp. 19-20). With this in mind the network boundaries for this study were defined as follows: During the hosting and organization of a generic Olympic Games in a given country, the most primary Olympic ambush marketing stakeholders involved in ambush marketing processes through formal relationships (i.e., contracts, agreement, guarantees). As a result of the stated boundaries, the network of actors related to the issue of ambush marketing within the discussed context of the Olympic Games is relatively small. The sociomatrix provided in Table 6-1 presents a list of the 11 key network actors identified as having direct involvement with the issue of ambush marketing within the Olympic Games. This sociomatrix provides a basic representation of the existence or non-existence of a directed relationship between each of the actors around the issue of ambush marketing in a given Games. Figure 6-1 takes this information a step further and provides visual representation of these relationships, that is, the Olympic Games ambush marketing network, in the form of a sociogram. Although these alone tell us little about the network, they provide an indication of the actors and relationships which exist and serve as the basis for the density and centrality measurements that provide greater insight into the relationship between this network structure and stakeholder power and influence.

TABLE 6-1: Directed Olympic Ambush Marketing Stakeholder Relationships (Non-valued)

	IOC	OCOGs	Past OCOGS	Host Governments	Host NOCs	NOCs	TOP Sponsors	Local Sponsors	Bid Committees	Athletes	Agencies
IOC	1	1	1	1	0	1	1	0	1	1	0
OCOGs	1	1	0	1	1	0	1	1	1	0	0
Past OCOGS	1	1	1	0	0	0	0	0	1	0	0
Host Governments	1	1	0	1	0	0	0	0	0	0	0
Host NOCs	0	1	0	0	1	0	0	0	0	0	0
NOCs	1	0	0	0	0	1	1	0	0	0	0
TOP Sponsors	1	1	0	0	0	1	1	0	0	1	0
Local Sponsors	0	1	0	0	0	0	0	1	0	1	0
Bid Committees	1	0	0	0	0	0	0	0	1	0	0
Athletes	1	1	0	0	0	0	1	1	0	1	0
Agencies	1	1	0	1	1	0	1	1	1	0	1

Note: In the above chart, 1 refers to the presence of a connection between stakeholders while 0 refers to the lack of a connection.

FIGURE 6-1. Network Illustration of Olympic Ambush Marketing Stakeholders (Non-valued)



Centrality.

Centrality measures are among the most widely studied tenants of network analysis and are recognized as offering a way to examine the importance and influence which may result from the position of actors within their network (Degenne & Forse, 1999; Freeman, 1977; Ibarra, 1993; Rowley, 1997; Wasserman & Faust, 1994). As Rowley (1997) noted “centrality refers to power gained through the network’s structure, as opposed to power gained through individual attributes” (p. 898). With this in mind, degree centrality, betweenness centrality, and eigenvector centrality have been measured to provide insight into the determination of stakeholder (actor) power and the potential for knowledge transfer within the Olympic ambush marketing network. Each of these results are discussed below.

Degree centrality.

In its simplest form, degree centrality refers to the number of ties between actors within a network and therefore the connectedness of each actor. In the case of a directed graph, both in-degree centrality and out-degree centrality are measured. In-degree centrality is the total number of ties that an actor has directed towards it, while out-degree centrality is the total number of other actors to which an actor's own ties are directed (Scott, 2000). Table 6-2 outlines the in-degree and out-degree centralities of the actors in the Olympic ambush marketing network.

TABLE 6-2: In-degree and Out-degree Centrality in the Olympic Ambush Marketing Network

	In-degree	Out-degree
IOC	8	7
OCOG	8	6
Past OCOGs	1	3
Host Governments	3	2
Host NOCs	2	1
NOCs	2	2
TOP Sponsors	5	4
Local Sponsors	3	2
Bid Committees	4	1
Athletes	3	4
Agencies	0	7

High in-degree centrality is argued to be indicative of one type of power and importance which can result from an actor's place within a network. The three actors that are found to have the highest in-degree centrality are the IOC (8), OCOGs (8) and TOP sponsors (5). As a result of the greater number of ties directed towards them, network theory suggests that these three actors likely have greater access to information from

multiple and varying sources which they can access with ease (Degenne & Forse, 1999). It may also be easier for them to set up alliances with other actors and approach the management of important issues with a greater knowledge base supporting them (Degenne & Forse, 1999).

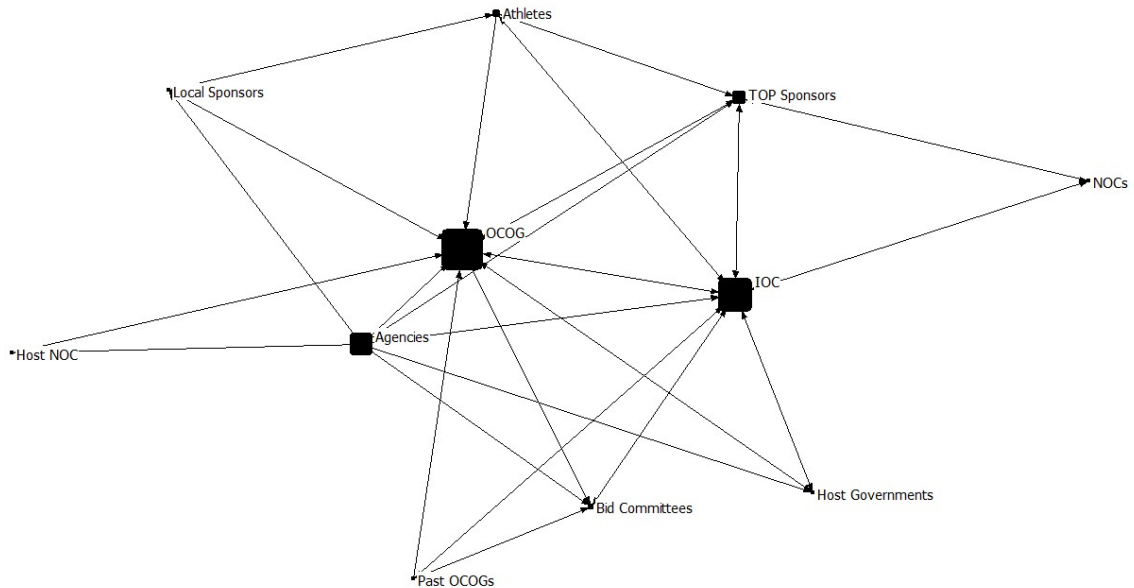
The IOC (7), agencies (7), and OCOGs (6) are the three actors found to have the greatest out-degree centrality in the Olympic ambush marketing network. The fact that they possess the largest number of ties that are directed towards other actors in the network suggests that their knowledge and opinions will be more widely dispersed across the network (Degenne & Forse, 1999). As a result, the IOC, agencies, and OCOGs will have the largest influence on the understanding of, and approach to, the issue of ambush marketing within the Olympic Movement.

Overall, actors with a high degree centrality are understood to represent the place “where the action is” within a network (Wasserman & Faust, 1994). The results suggest that with regards to Olympic ambush marketing, the IOC and OCOGs are the stakeholders around that such action revolves, with TOP sponsors and agencies each involved to a lesser extent. As a result, each of these actors gain power, influence, and importance from their connectedness within the network structure, and play an important role in the transfer of ambush marketing knowledge within the Olympic Movement (Degenne & Forse, 1999; Freeman, 1987; Ibarra, 1993; Rowley, 1997; Wasserman & Faust, 1994).

Betweenness centrality.

Betweenness centrality is described by Knoke and Yang (2008) as the “extent to which other actors lie on the geodesic (shortest) path between pairs of actors in the network” (p. 67). Figure 6-2 demonstrates the calculated betweenness centrality for the Olympic ambush marketing network outlined in Figure 6-1. In Figure 6-2, the larger the size of the node, the greater the betweenness measure of the actor related to that node. Figure 6-2 demonstrates that OCOGs and the IOC are the actors with by far the greatest betweenness centrality, with agencies and TOP sponsors falling behind the top two but still significantly ahead of all other actors.

FIGURE 6-2. Actor Betweenness Centrality in the Olympic Ambush Marketing Network



High betweenness centrality is arguably very significant as an indication of importance and influence in knowledge transfer, as betweenness centrality is particularly indicative of an actor’s potential ability to control information and communication flows

across the network (Borgetti & Everett, 2006; Freeman, 1977; Knoke & Yang, 2008; Prell, Hubacek & Reed, 2009; Rowley, 1997; Scott, 2000). As a result, those actors, in this case the IOC and OCOGs most specifically, which have high betweenness centrality, are described as network brokers or gatekeepers (Rowley, 1997; Scott, 2000). As ‘gatekeepers’, network theory suggests these actors have the ability to control and influence information and communication flows in a variety of ways. For instance, it is argued that given their betweenness centrality, OCOGs and the IOC have a greater ability to facilitate exchanges (Freeman, 1977), mobilize exchange measures, and diffuse information (Prell et al., 2009) across the Olympic ambush marketing network when compared to other identified actors. The gatekeepers are also able to exert greater control over the content and timing of these communication flows (Knoke & Yang, 2008). On the other hand, given their high betweenness centrality, it may be easier for OCOGs and the IOC to manipulate the information that is being transferred across the network. They may be able to bias, impede, or altogether prevent knowledge flows (Freeman 1977; Rowley, 1997).

In addition to allowing a greater potential for control, high betweenness centrality may also allow OCOGs and the IOC to link together segments of the network which might otherwise be isolated (Prell et al., 2009). In doing so, they may be able to increase their power as the less central actors may become dependent on these ‘gatekeepers’ in order to stay connected to the network and involved in the flow of information (Scott, 2000).

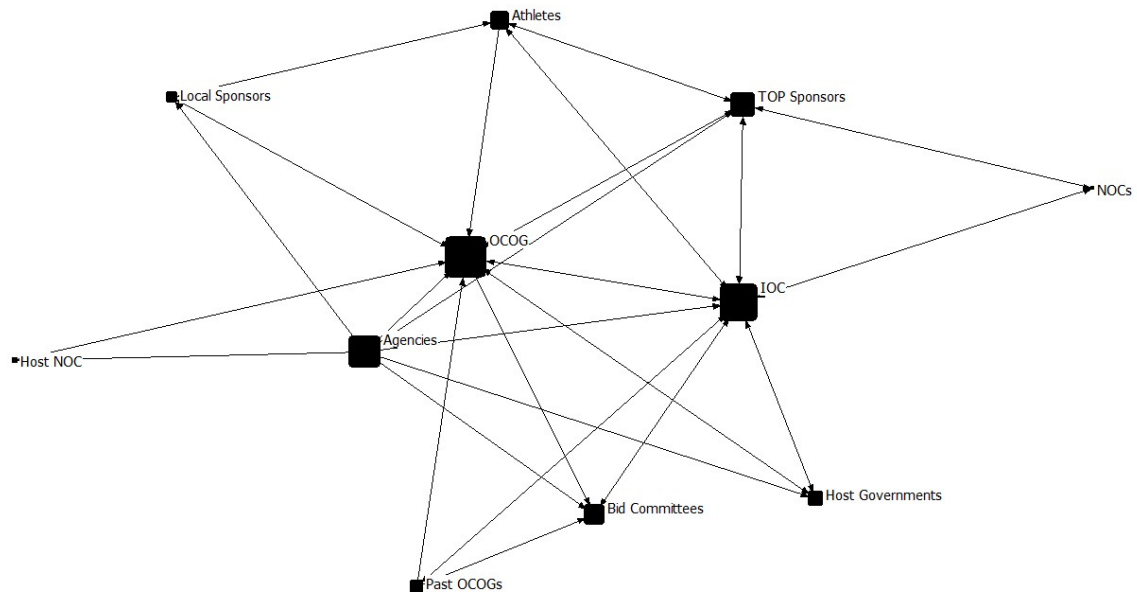
Eigenvector centrality.

Eigenvector centrality is a measurement where the “centrality of each vertex is [...] determined by the centrality of the vertices it is connected to” (Borgatti, Everett & Freeman, 2002, ¶ 2). The calculation of eigenvector centrality takes into account direct and indirect ties, weighting each contact according to its own centrality, and thus considering the network pattern as a whole (Bonacich, 2007). Eigenvector centrality is noted by Bonacich to be particularly insightful in circumstances where “a low-degree individual is connected to high degree others (his [eigenvector] centrality will be relatively high) or in which a high-degree other is only connected to low degree others (his [eigenvector] centrality will be relatively low)” (p. 561). Simply understood, the importance of those with high eigenvector centrality is partially derived from their ties to important others (as demonstrated by other centrality measures). Bonacich and Lloyd (2001) argued that this makes sense as, for instance, status rubs off on an actor’s associates or, the more knowledgeable one’s source of information is, the more it adds to one’s own knowledge.

In order to ensure the robustness of the eigenvector centrality measure, the eigenvalues were calculated and the pertinent results are reported in Table 6-3. According to Bonacich (1972), the ratio of the largest eigenvalue to the next largest should be at least 1.5 and preferably 2.0 in order to demonstrate the robustness. As shown in Table 6-3, the largest eigenvalue is 5.374 while the second largest is 1.337 for a reported ratio of 4.018, thus demonstrating Bonacich’s required ratio for robustness.

TABLE 6-3: Eigenvalues for the Olympic Ambush Marketing Network

Factor	Value	Ratio
1	5.374	4.018
2	1.337	1.090
3	1.227	1.819
4	0.675	4.842
5	0.139	
6	-0.323	
7	-0.684	
8	-1.129	
9	-1.472	
10	-2.350	
11	-2.795	

FIGURE 6-3. Eigenvector Centrality in the Olympic Ambush Marketing Network

Similar to the reported betweenness and degree centrality measures, results show OCOGs and the IOC, followed by agencies and TOP sponsors, as having the greatest eigenvector centrality. This is demonstrated by the network sociogram in Figure 6-3 where, once again, the larger node size denotes the greater centrality measure. Compared

to degree and betweenness centrality, eigenvector centrality is not as widely used as a suggestive measure of power and influence among network actors. It can be argued, however, that it is significant in contributing to an understanding of how network structures may impact stakeholder power and influence through what it tells us about the importance of network actors. Given the above understanding of eigenvector centrality, it can be argued that OCOGs and the IOC in particular not only have power and influence through high degree and betweenness centralities but also importance demonstrated through high eigenvector centrality. These results also suggest that degree centrality is fairly representative of those actors whose network positions offer the potential for influence within that network, as even after taking into account direct and indirect ties and weighting them, similar results have been produced.

It is argued that these results have shown, unsurprisingly, the IOC and OCOGs demonstrate the greatest stakeholder power and influence within the Olympic ambush marketing network as a result of their positions within that network. In-degree and out-degree centrality measures suggest they are highly connected within the network, and as such have greater access to information and knowledge as well as the ability to spread their own knowledge and opinions. Betweenness centrality measures suggest the IOC and OCOGs, as ‘gatekeepers’ have the greatest ability to exert control over information and communication flows across the network. Finally, eigenvector centrality measures indicate that the IOC and OCOGs can be considered as the most important network actors given their centrality with regards to their ties to other important actors. Overall, their positional status as the network actors with the greatest connectedness, control, and importance arguably suggests they are the most powerful and influential stakeholders

with regards to Olympic ambush marketing. Moreover, the centrality measures indicate an important role for agencies and TOP sponsors in the ambush marketing process.

Although this can be described as a more external influence that is not as strong as that of the IOC and OCOGs, they are arguably still able to exert some influence and control in the ambush marketing decision-making.

Density.

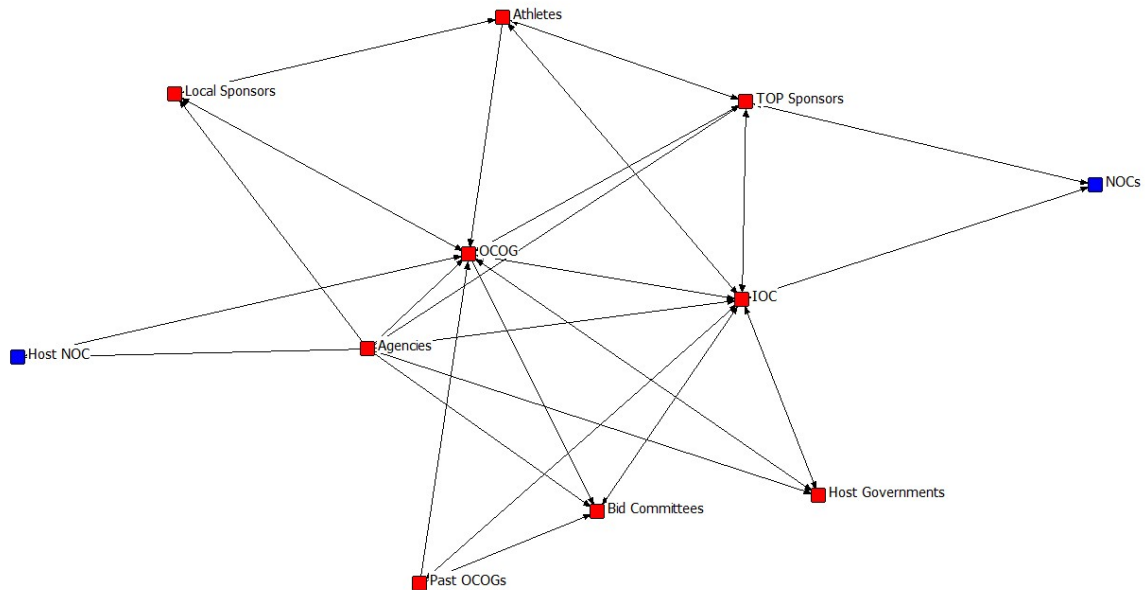
Density in the context of network analysis is a measure that refers to the structure of the entire network rather than individual actors or groups. It is defined by Scott (1988) as “the ratio of the actual number of lines in the graph to the number which would be present if all points were connected to all others” (p. 114). It is important to note, however, that the mathematical properties of density must not be considered outside of actual structural considerations of the network (Scott, 1988). Specifically, the size of the network must be considered as density is inversely related to network size. This is described by de Nooy, Mrvar and Batagelj (2005) who noted “the larger the social network, the lower the density because the number of possible lines increases rapidly with the number of vertices, whereas the number of ties which each [actor] can maintain is limited” (p. 63). As a result, a density that might be generally interpreted as low, when understood as a straightforward percentage, may actually be high given the size of the network. As a guide, Scott (2000) suggests that a network with a density of 1 (i.e., all actors are connected to every other actor) is extremely rare, and given the constraints on the ability of actors to maintain relationships with so many other actors in a large network, it is even unlikely that a network density would be greater than 0.5.

The density of the Olympic ambush marketing network as pictured in Figure 6-1 (p. 159) when calculated as an undirected network was found to be 0.355, with 39 of a possible 110 ties existing in the network. Given the size of the network, which is arguably small, and the above understanding about considerations in judging density, it can be argued that this represents a moderately high network density. It is suggested that the greater the density of a network, the easier it is to facilitate the exchange of information across that network. As actors have a greater number of connections to each other, the movement of information and knowledge across that network is increasingly efficient (Rowley, 1997). As a result of this efficient movement, the diffusion of norms becomes more widespread and the homogeneity of network actors is enhanced. The moderately dense Olympic ambush marketing network is suggestive of a situation where knowledge and understanding about the issue of ambush marketing is spread with relative ease among most members of the network, but is perhaps not without some difficulties. It also suggests that, within the network, there is likely to be a coordinated set of beliefs and understandings about the practice, for instance related to the potential damage it might do if left unchecked (i.e., confuse consumers, damage the value of Olympic sponsorship etc.) and/or the ways in which it might be prevented (i.e., legislation, education, shaming etc.), but there are also likely to be issues and concerns which have a greater level of variance in understanding and approach among network actors.

K-Core.

The K-core measure of a social network is “a sub-graph in which each node is adjacent to at least a minimum number, k , of the other nodes in the sub-graph” (Wasserman & Faust, 1994, p. 266). An examination of K-cores is argued to be an

important compliment to other density measures (Scott, 2000). While K-cores are not necessarily representative of fully organized subsets of the network, they are able to help highlight areas of the graph that contain general ‘clique-like’ configurations (Borgatti et al., 2002). The k-core of the Olympic ambush marketing network is illustrated in Figure 6-4. While it is not unusual for small networks to have few cliques or clique-like structures (Knoke & Yang, 2008), it can be argued that this sociogram simply shows that the majority of network actors in the Olympic ambush marketing network are connected to at least three other actors, while NOCs and Host NOCs are outside of this clique. Therefore, rather than telling us much about the majority of actors, the key finding of this measure suggests that NOCs and Host NOCs are perhaps less integrated into the network. As a result, the flow of information and resources to NOCs and host NOCs is likely to be less efficient and effective. For instance, during the Games when quick reactions are needed their opinions may not be sought and/or they may not be kept abreast of what is happening in the fight against ambush marketing. Furthermore when they are making decisions they might be more likely to have less information about the situation than other stakeholders within the organizational field. This is something that should be considered in future research.

FIGURE 6-4. Olympic Ambush Marketing Network K-Core Illustration

Transfer of Olympic ambush marketing knowledge.

Alongside network structure, this study also sought to examine the tools and techniques and unique challenges related to the transfer of Olympic ambush marketing knowledge. While the above results and discussion indicated that the network structure would play a role in determining individual actor's success, efficiency, and ability to control or manipulate this process, in this section, the tools, techniques, and unique challenges will be examined, while the links between knowledge transfer and the network structure will be discussed more explicitly in the concluding section of this study.

It was found that the transfer of Olympic ambush marketing knowledge was accomplished using both formal and informal tools and techniques. For the purpose of this study, formal Olympic ambush marketing knowledge transfer tools are defined as those which are officially cited as making up part of the knowledge base for the OGKM program. Typically, this involves data and resources that the IOC requires stakeholders,

including itself, to produce, present and/or submit, and whose written manifestations, if they exist, are available to stakeholders through the OGKM extranet, among other methods. The informal Olympic ambush marketing knowledge transfer tools are defined as those that are sought and/or offered independently by stakeholders outside of the OGKM program. Such tools tend to be comprised of the sharing of tacit knowledge as much, or more so, than explicit knowledge. The specific tools and techniques used to transfer Olympic ambush marketing knowledge are outlined in Table 6-4 and will be briefly discussed below.

Formal knowledge transfer tools.

The Olympic Games Knowledge Management program is the formal system created and managed by the IOC beginning in 2000 that collects and transfers official knowledge about all aspects of the Olympic Games. Ambush marketing is just one small topic that is covered under this program; as a result, there are few, if any, specific formal processes in place that relate directly to transferring ambush marketing knowledge. Rather, it is part of each aspect of the OGKM.

The first, and most important, formal Olympic ambush marketing knowledge transfer tool is the OGKM extranet. This is referred to as the “primary working tool of the programme” (IOC, 2006c, p. 2). It is an online repository and distribution system for all the information that is collected through the OGKM program. It allows pertinent stakeholders to access the collected information at any point, including as early as the bid stage. Within the OGKM, stakeholders are able to access function-specific (e.g., marketing, brand protection) documents, official games reports, debriefing reports,

technical manuals, and more. Within this section on formal knowledge transfer tools, each of the other, more specific tools discussed are each accessible to stakeholders via the OGKM Extranet.

A second formal knowledge transfer tool for Olympic ambush marketing, described as the key piece of knowledge transfer by the IOC (2009f), is the technical manual. The technical manual is the first item of knowledge delivered by the IOC to new Games hosts, and is an extension of the host city contract that is signed by all host cities at the time of their election (IOC, 2007). The functions of host cities are divided into many areas, each of which has its own technical manual. Knowledge about ambush marketing is found in the brand protection technical manual that states its purpose as:

Assist[ing] the Olympic Candidate Cities and Organizing Committees for the Olympic Games in planning and preparing for the Olympic Games by illustrating what the OCOGs must do to *(a)* protect Olympic intellectual property, including marks and imagery, by preventing and confronting infringement, *(b)* protect the rights of Olympic marketing partners by preventing and confronting ambush marketing, *(c)* protect the image of the Olympic Games by maintaining clean venues and a controlled and balanced host city commercial environment. (IOC, n.d., p. 6)

Essentially, the technical manual is a ‘how to’ guide which sets out the requirements, practices, and policies that should guide the new host city in planning and staging the Games (IOC 2007).

TABLE 6-4: Olympic Ambush Marketing Knowledge Transfer

Knowledge Transfer Tool	Formal/Informal	Provider	Receiver
Extranet	Formal	IOC OCOGs	OCOGs Sponsors (TOP & Local) NOCs Bid Cities
Technical Manual	Formal	IOC	OCOGs Sponsors (TOP & Local) NOCs Bid Cities
Official Debriefing	Formal	IOC OCOG	OCOGs Sponsors (TOP & Local) IOC NOCs Media Public
Official Observer Program	Formal	IOC OCOGs	OCOGs Sponsors (TOP & Local) NOCs Bid Cities
Seminars/Workshops	Formal	IOC OCOG	OCOGs Sponsors (TOP & Local) NOCs Bid Cities

Final Reports	Formal	OCOG IOC	Publically available
Research Reports	Formal	IOC	IOC OCOGs Sponsors (TOP & Local) NOCs Bid Cities
Other Documents	Formal	IOC OCOGs	IOC OCOGs Sponsors (TOP & Local) NOCs Bid Cities
OCOG presentations/other	Informal	Past OCOGs	OCOGs
Sponsor information	Informal	TOP sponsors	IOC OCOGs NOCs
Agencies (i.e., consultancy information and advice)	Informal	Agencies	IOC NOCs OCOGs Sponsors (TOP & Local) Bid Cities Governments
Olympic Gypsies	Informal	Past OCOGs	OCOGs Bid Committees

For instance there are two clear sections in a technical manual: one focusing on ambush marketing and the other on clean venue guidelines. In the ambush marketing section the technical manual discusses, among other things, coordination among numerous groups (i.e. the Olympic family, sponsors, government), communication and education of key audiences, and the creation and use of legislation (IOC, n.d.). The clean venue section discusses, among other things, general clean venue obligations, information on coordination with venue owners, designers and managers, protocol for enforcing provisions, and standard operating procedures (IOC, n.d.). In addition the appendix offers examples of legislation, sample letters, examples of incidents of ambush marketing, and sponsor marketing incident report forms. At the end of each Games, the technical manuals are reviewed and, if needed, updates are added based on the learnings from the Games. It is important to note, however, that the brand protection technical manual represent a very core set of policies and procedures, and, as such, is only a foundation for the brand protection program which will exist for each individual Games. Given the variety of cultural and legal frameworks in which the Games take place, it would be difficult to provide rigid and overarching guidelines about exactly what an OCOG must do with regards to a function such as brand protection.

The official debrief is another way that Olympic ambush marketing knowledge is transferred. The debrief is a series of lectures, meetings and sessions which take place over multiple days, 4-6 months after the conclusion of an Olympic Games. Organized by the IOC and presented by IOC employees, and senior management of the outgoing OCOG, the debrief is based on themes and challenges which are important going forward, and tries to provide key learnings for many areas of hosting (IOC, 2006d). The

sessions are open to future OCOGs, sponsors, NOCs, and invited guests but, as was the case for the Vancouver 2010 debrief, most of the participants seem to be from the OCOG for upcoming Games.

The official observer program represents the opportunity for future OCOGs to attend the Olympic Games and live, learn, and experience them live (IOC, 2008b). This opportunity was described by an interviewee from an OCOG as:

A tremendous learning experience for me because I got to see firsthand their policies and procedures enacted in real-time so that allowed me to go back and look at my policies and procedures and judge whether or not they are realistic, strengths and weaknesses etc. so that was probably my single biggest learning opportunity.
(OCOG1)

The ability of the OCOGs to experience the way those that came before them approached it within the pressures and constraints of Games time would seem to be an important method of knowledge transfer in this area.

Seminars and workshops are also a part of Olympic ambush marketing knowledge transfer. Sponsor workshops have been part of Olympic marketing since the beginning of the TOP program and have evolved alongside it. The workshops tackle such topics as operational issues, the best way to activate rights, and, as it has become more important, brand protection and anti-ambush marketing strategies. Such workshops have been organized by the IOC's affiliated marketing agencies, ISL and Meridian, in the past, but are now a function of the IOC marketing department. There are also OGKM specific workshops that are focused on providing knowledge to OCOGs. On average, a host city

organizes 10-15 workshops a year based around different functions and/or themes (IOC, 2009f). The workshops are individually designed and given by IOC designated advisors, and must be requested by the OCOG to address particular needs (IOC, 2009f).

Final reports are also considered part of the OGKM program, although they were a tool of knowledge transfer long before the OGKM existed. The final reports consist of a wrap-up of all the important information and outcomes from the Games, and this includes information and learnings related to ambush marketing. Although all information contained in a final report could be considered part of the knowledge transfer process, some organizing committees format their report to draw greater attention to specific learnings. For instance, at the end of each section, the 1996 Atlanta Games final report has a subsection entitled “Conclusions and Recommendations.” Similarly, the Salt Lake City final report offered subsections on “Lessons” as well as “Challenges and Issue Resolution.” Within the brand protection section of the Salt Lake City report, lessons included:

Brand protection devised a labour plan that identified risk or exposure areas by venue and function. Twenty-seven areas of exposure were identified in connection with the Olympic Winter Games. Brand Protection specified the desired operational response for each function within the venue and cross-trained people. (SLOC, 2002, p. 484)

These reports are publically available; as a result, the information they possess is generally surface information, but an important part of knowledge transfer nonetheless.

The OGKM also contains a database of research related to Olympic topics. This includes research that has been specifically conducted by, or on behalf of, the IOC as well as independent academic studies of interest. The IOC began to undertake its own brand and marketing related research in the mid to late 1990s, and have continued to add to their knowledge about their brand and consumers since that time. Research on sponsorship recall, the Olympic brand image, identity and recognition, and consumers attitudes towards ambush marketing are among the topics which provide important learnings for knowledge transfer related to ambush marketing.

Finally, in addition to the above specific documents that are required to be part of the OGKM program, any other important documentation that is seen as pertinent by the IOC and OCOGs can be added to the database. In the context of ambush marketing, such documents include, among other things, sponsor handbooks, and the Ambush Prevention and Clean Venue Guidelines.

Informal knowledge transfer tools.

The informal knowledge transfer tools, for the most part, exist as a result of the independent efforts of stakeholders rather than the requirements of the IOC. As a result, they are inconsistent from Games to Games, with some stakeholders contributing and benefitting more than others. That said, the informal tools still play an important role in ensuring Olympic stakeholders have what they need to make Games brand protection a success.

In some cases, OCOGs, or even just certain people or groups within an OCOG, will go out of their way and beyond expectations to ensure that future OCOGs are able to

benefit from their knowledge. This might be through presentations, extra documentation, or simply being available to answer questions long after an OCOG has ceased to exist in a formal way. This was evident with some OCOGs in regards to ambush marketing knowledge, specifically Salt Lake City and Vancouver. For instance, one interviewee linked to Vancouver's anti-ambush marketing program noted that:

I am still exchanging information with my peers in London and Sochi on a periodic basis. At this point now, it is voluntary I guess [...] The fact that [the IOC] have done more to establish [a network in their thinking to keep that in mind] makes us all more favourably inclined to receive those phone calls and emails and things, and keep offering standing information. (OCOG1)

This quote shows that while the transfer of knowledge is taking place outside of the IOC's expectations, the OGKM program is still having somewhat of an impact on the knowledge transfer process. It also shows that even after the official expectations of the OGKM have been met, there is a desire by some to continue to supplement the official knowledge transfer while there is an obvious appetite for that knowledge on behalf some OCOGs.

Another method of informal ambush marketing knowledge transfer comes from the experience of longstanding sponsors. Some have been around since before the beginnings of the TOP program, and as a result, have years of accumulated knowledge and experience. Given that OCOGs have a lifetime of only seven years, this experience is vital; and they recognize their role in providing this information to those who need it. When asked about the transfer of sponsorship and ambush marketing knowledge, one

interviewee stated, “at the end of the day we are the oldest sponsor [...] the wisest sponsor, because we have been at it the longest; and therefore we tend to play a role and we are very connected with just about every player” (SPO1).

While some former OCOG employees still make themselves available when they can in order to answer questions and provide guidance, others take a more direct role in transferring knowledge by taking a job with a new OCOG. This method of knowledge transfer is indirect but once again very important in an organization with such a limited lifecycle. These employees have become known as Olympic gypsies or groupies; and the knowledge and experience they bring with them from OCOG to OCOG is an important aspect of knowledge transfer. As simply described by one interviewee, “some transfer of knowledge [...] comes from the fact that there are a whole bunch of Olympic groupies that kind of move around the circuit so they have been there and done that” (IOC1).

Another noted that:

They [OCOGs] [have] the benefit of someone there [...] who has years and years of accumulative experience and the access and benefits of that because issues always arise and questions always arise and they probably have arisen before in a previous Games and there is probably a reasonable answer for it, or solution.

(AGN2)

There have been such employees within many functional areas of OCOGs including within sponsorship and brand protection, and the ‘been there done that’ experience of everyday employees offers a different focus to the knowledge they bring with them than the policy and procedure based formal OGKM tools.

Finally, agencies/consultants seem to play a role in helping to transfer sponsorship and ambush marketing knowledge. Many former employees of the IOC, sponsors, OCOGs, etc., have gone on to set up their own agencies and consultancy companies based on their many years of high-level experience as part of the Olympic Movement. From an ambush marketing perspective, these organizations might offer knowledge about how to go about passing anti-ambush legislation, how to best answer the IOC's expectations with regards to clean venues in a bid, or insider knowledge about the tactics which may be employed by ambushers. These companies specialize in providing their knowledge, advice, and guidance to many stakeholders within the Olympic family including governments, bid cities, and OCOGs. Unlike other informal methods of knowledge transfer, there is a formal aspect to the knowledge provided by such agencies. They are paid for this knowledge; as a result, it is the product around which their organization is based. That said, however, it is still sought by stakeholders at their own behest and is entirely supplemental to anything provided by OGKM.

Knowledge transfer challenges and issues.

While there was a sense that general knowledge transfer within the Olympic movement, including that related to ambush marketing, had improved greatly in recent years, there still appears to be some challenges and issues to overcome. These were found to be related to trust, coordination, international context, and breadth of focus.

Much of the Games specific information that is transferred between stakeholders is provided by the IOC and received by the OCOG. It was noted, however, that there seems to be some issues around trust between the two parties. It is argued that the

OCOGs can be somewhat reluctant to take guidance and advice from a central body like the IOC despite what would seem to be an obvious basis for a close relationship. As described by one interviewee when discussing knowledge transfer:

To be equally frank, most organizing committees didn't want to hear about it because they, most organizing committees, beg the IOC to give them this event, and as soon as they have got the event, they see the IOC as the enemy. (AGN1)

While the view of the IOC as the enemy may be somewhat hyperbolic, this quote highlights the fact that there seems to be a tense relationship between OCOGs and the IOC. This lack of trust is also evident in other ambush marketing stakeholder relationships and much of it seems to stem from differences and suspicions with regards to common purpose and goals between the stakeholders. In discussing the knowledge transfer relationship between the IOC and OCOGs, one respondent commented that “there is this inherent suspicion between the organizations, a feeling perhaps that there wasn't common purpose and because of that they would tell us as little as possible and we would pour out our hearts” (AGN 1). With suspicion about the reason why one stakeholder is passing on certain knowledge, it makes sense that another stakeholder might be reluctant to accept or seek out such advice. Results also suggested that suspicions about reasons behind knowledge transfer potentially being self-serving might impact the chances of it being taken into consideration despite the potential useful nature of the information. Such findings imply knowledge transfer within the Olympic movement may be as much about strengthening relationships as developing formal tools and techniques.

Closely related to the potential issues caused by a lack of trust, there also appeared to be some issues with overall coordination between stakeholders. Beyond the formal coordination required by the OGKM, stakeholders noted that in some cases despite their efforts other stakeholders were uninterested in voluntarily gathering and passing on the knowledge they had acquired during the course of previous Games. For instance, when asked about the informal knowledge transfer relationship between a current OCOG and previous OCOGs, one interviewee laughed at the suggestion that they had been able to go back to the previous brand protection team and learn from them stating “yeah, I can’t put a finger on exactly why, and maybe if I had jumped up and down, and pleaded with them to give me contacts [...] it might have happened” (OCOG2). On the other hand, it was also noted that some stakeholders did not care to seek out or receive such information, as they did not believe that other stakeholders would have the knowledge necessary to assist them within their own set of circumstances. Frustration with such reasoning was clearly demonstrated by an interviewee from the IOC who felt that “organizing committees who have never done anything in their lives think that they know everything, and anything that the IOC tells them is European dog turd and ‘what do they know from Switzerland?’” (IOC1). The interviewee argued that this attitude was a barrier to the transfer of ambush marketing knowledge. While their participation in the OGKM program ensured that stakeholders always had access to policies and procedures related to ambush marketing, there is much information still to be gathered through the informal channels discussed in the above section. While some OCOGs were felt to be excellent at offering their time and expertise, it is in this area that the need for autonomous coordination is important and the inability

or lack of desire for participating in such coordination by some might be harmful and a key challenge for stakeholders.

The international context that is inherent in all aspects of the Olympic Movement offers another challenge for the transfer of ambush marketing knowledge. While the ability to pass on information is not in danger due to the international context, it is the usefulness of that knowledge that can be questioned at times. Particularly with regards to ambush marketing knowledge, the differences in local feelings towards the practice, the legal frameworks of various countries and the openness of the commercial marketplace mean that knowledge and learnings will need to be carefully adapted to each market. This was supported in the literature by Parent, MacDonald, and Goulet (2013) who suggested that knowledge tailoring was a vital, but often overlooked, element of knowledge transfer. They argued “knowledge tailoring was necessary for a more effective acquisition, and, therefore, a higher likelihood of application [of knowledge]” (p. 11). For instance Preuss et al. (2008) noted that in China consumers tend to be more socialized in a system that operates under an assumption of shared belonging. Applying tactics to name and shame ambusher marketers in such a context is unlikely to garner the same response as in another country with a more sensitive approach to individual ownership. At the same time however it is recognized that previous knowledge should not be discounted just because of difference in contexts in which it is applied. It is also suggested that in addition to requiring an adaptation to each specific market the idea of an overdeveloped knowledge transfer program might take away from the unique flavour of the Games. It is suggested that part of the global nature of the Olympics is born out of the fact that every Games and every approach to hosting is different rather than applying a

‘cookie-cutter’ method. In discussing ambush marketing knowledge transfer, this sentiment was best described by one interviewee who argued that:

The Olympics is not like the World Cup with identical presentation and structure each time. Part of the strength comes from bringing out the local character, style, flavor, and energy of the host country, and it is a marriage of the depth and history of the Olympic brand with the new dynamic of the host country. (IOC6)

This suggests that, although a lack of knowledge transfer might certainly be recognized as a problem, it must be tempered with an understanding that the unique character of the host country and Games is also vitally important; the IOC and OCOGs should be equally vigilant in ensuring that overly rigid structures and expectations are not the result of an intensive knowledge transfer program. As noted by Parent et al. (2013) knowledge tailoring to ensure that stakeholders are receiving the information they can best understand and apply in their context, would enhance the likelihood that the knowledge will actually be applied.

The final issue that was recognized with regards to ambush marketing knowledge transfer was that despite all the increased time and effort involved in the OGKM program, there was still felt to be a lack of knowledge transfer to stakeholders other than OCOGs. Most specifically, it was felt that the NOC to NOC and IOC to NOC knowledge transfer was lacking. While NOCs have access to official debriefs and all the information on the OGKM extranet, there was little effort to encourage or develop a transfer of knowledge program which specifically benefitted the NOCs and met their specific needs.

This lack of quality knowledge transfer for NOCs was lamented by one respondent who argued that:

Formally, the NOC to NOC transfer is weak, and the IOC should be doing a lot better making sure that happens [...] I just don't think there is a structure in place that if it is really Games to Games focused versus, you know, there is a lot of tangible and intangible ways the NOCs are affected, and some of it for the NOC is the feelings of alienation and not being viewed as important. (NOC1)

This sense of isolation for NOCs is arguably visible in the network structure when we refer back to Figure 6-4 (p. 170). The network analysis shows that NOCs and host NOCs exist outside the main network “clique” which would suggest they are not as connected to the rest of the ambush marketing actors. With this in mind, it is not surprising that there is a perceived issue with regards to the amount of knowledge transfer that takes place for NOCs. Given that NOCs are permanent organizations within the Olympic Movement, it seems to make sense that knowledge transfer should be just as important for them to help ensure the smooth operation of the Olympic Games. While ambush marketing is an issue that is most pertinent in periods right around the Games, it is also an issue that NOCs may have to deal with at other times and should therefore be prepared for. Consequently, meeting the needs of the NOCs, some of which require more assistance and outside knowledge than others, can arguably be recognized as a challenge for the IOC OGKM going forward.

Networks, knowledge transfer and institutional processes.

Within the literature, there seems to be a rational link between some elements of institutional theory and network concepts (e.g., DiMaggio & Powell, 1983; Meyer & Rowan, 1977; Oliver, 1991; Owen-Smith & Powell, 2008; Rowley, 1997). Most pertinent for this study, Owen-Smith and Powell (2008) noted that “networks generate the categories and hierarchies that help define institutions and contribute to their efficacy. Thus, any effort to understand institutional processes must take networks into account” (p. 594) This section seeks to discuss how the Olympic ambush marketing network may have impacted the processes of institutionalization within Olympic sponsorship and ambush marketing specifically related to anti-ambush marketing legislation. According to Tolbert and Zucker’s (1996) framework, described in Chapter Three and applied in Study I, the movement of a practice into the stages of semi-institutionalization and institutionalization are dependent on its undergoing the processes of objectification and sedimentation respectively. It is argued here that the structure of the Olympic ambush marketing network (i.e., centrality and density) suggests certain stakeholders, and the network as a whole, have been able to impact these institutional processes of objectification and sedimentation through their ability to influence institutional logics and the diffusion and acceptance of norms across the Olympic ambush marketing network. These relationships are demonstrated in Figure 6-5 and 6-6 and are explained in greater detail below.

FIGURE 6-5. Relationship Between Networks and Objectification

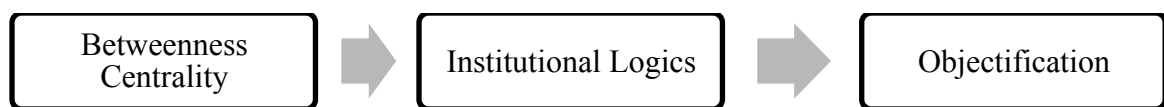
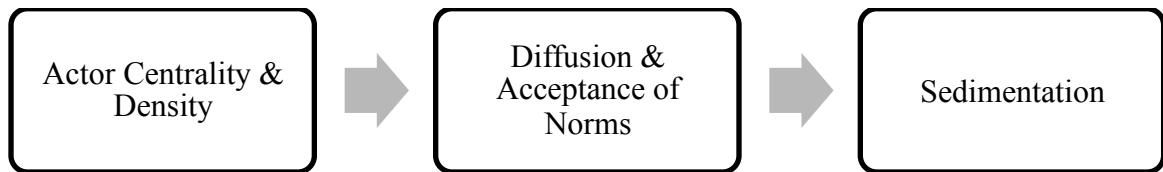


FIGURE 6-6. Relationship Between Networks and Sedimentation***Networks, institutional logics, and objectification.***

Institutional logics are defined by Owen-Smith and Powell (2008) as:

The constellation of beliefs and associated practices [...] that a field's participants hold in common. These packages of beliefs and practices are organizing principles and recipes for action [...] providing a means for expectations and regulations to exert force upon the participants in a field. (p. 600)

It can therefore be argued that institutional logics can be impacted by network centrality. Specifically, network theory suggests that betweenness centrality is indicative of a stakeholder's ability to influence and manipulate information, knowledge, and opinions in the network. Actors with high betweenness centrality as network 'gatekeepers' have the greatest ability to bias information that is passed on through the network (Freeman, 1977; Scott, 2000; Rowley, 1997). This suggests that they can shape the beliefs and approaches of other network actors by manipulating the information in a way that suits their own objectives, therefore promoting their opinions and practices to become the dominant institutional logic on a given issue.

Overall, it is suggested that stakeholders with high betweenness centrality will have the power to influence institutional logics given their ability to impact the understandings, beliefs and approaches of other stakeholders. Through this influence on institutional logics, the stakeholders are arguably able to also influence the process of objectification. Tolbert and Zucker's (1996) characterization of objectification stated that it is a result of the "development of some degree of social consensus among organizational decision-makers concerning the value of a structure and the increasing adoption by organizations on the basis of that consensus" (p. 182). This description suggests that objectification is, in part, the process of influential stakeholders forming and validating institutional logics. Given the above argument that those stakeholders who demonstrate betweenness centrality will influence institutional logics; it can be argued that, through this influence, they also impact the process of objectification.

In the context of the Olympic ambush marketing network and the institutionalization of anti-ambush marketing legislation, the above suggests that given their high betweenness centrality in the ambush marketing network, the IOC and OCOGs had the greatest ability to impact the objectification stage of institutionalization of anti-ambush marketing legislation through their influence on the institutional logics surrounding the issue. This is further supported by the recognition that, as noted in Study I, the prevailing institutional logics which underpinned the objectification process were the IOC and OCOGs' opinions and arguments that ambush marketing was dangerous to the Olympic brand in general, that without drastic action it threatened the entire Olympic Movement, and that anti-ambush marketing legislation was an appropriate and essential tool for fighting against it. Their ability to use their network position to give credibility to

these ideas among other network actors such as governments, NOCs, bid cities, and athletes is indicative of their power and ability to shape the institutional processes at play through network centrality.

Networks and sedimentation.

There is a clear link in the literature between actor centrality, network density, and the diffusion and acceptance of norms across the network. From a network-wide perspective, the argument is made that the greater the density of a network the more efficiently knowledge and beliefs can be passed across the network, and therefore behaviours of those in the network become more homogenous (Rowley, 1997). As Oliver (1991) explains:

Interconnectedness facilitates the voluntary diffusion of norms, values and shared information [...]. Because highly interconnected environments provide relational channels through which institutional norms can be diffused this tends to create more implicit coordination and collectivization in a given environment, more consensus on diffused norms, and greater ubiquity of institutional effects. (p. 171)

Similarly, with regards to individual actors' out-degree centrality, betweenness centrality and eigenvector centrality, all speak to the ability of actors to influence the diffusion and acceptance of norms across the network. Actors with high out-degree centrality are argued to be highly connected to the network, this makes it easier for them to ensure their knowledge and recognized norms are widely dispersed throughout the network (Degenne & Forse, 1999). Actors with high betweenness centrality have an ability to control the information and communication flows across the networks

facilitating the diffusion of norms (Borgetti & Everett, 2006; Freeman, 1977; Knoke & Yang, 2008; Prell et al., 2009; Rowley, 1997; Scott, 2000). While the importance implied by high eigenvector centrality (Bonacich, & Lloyd, 2001), alongside the power and influence gained from betweenness and degree centrality fosters, acceptance of the norms. As demonstrated in Figure 6-6, this suggested ability of certain actors and the network structure to ease the diffusion and acceptance of norms in turn facilitates sedimentation and ultimately full-institutionalization.

Sedimentation is understood as the final process in the institutionalization of a practice (Tolbert & Zucker, 1996). It involves the dissemination of norms and practices across the entire applicable network, and Tolbert and Zucker (1996) argued “identification of the factors that affect the extent of diffusion [...] is thus key to understanding the process of sedimentation” (p. 184). With this in mind, the link between the outcomes of network structures (i.e., density and centrality) and sedimentation is clear: it is those actors who demonstrate centrality and the density of the network which arguably affect the extent of diffusion.

Once again in the context of the institutionalization of anti-ambush marketing legislation, the above suggests that the ambush marketing network structure has provided the IOC and OCOGs (both of which were found to have high centrality measures on all counts) the platform to not only form the institutional logics related to the practice but also ensure that they are widely diffused and accepted throughout the network thus ensuring their full institutionalization. It also suggests that given the moderately high density of the network such diffusion is possible with little difficulty. Going forward, this may imply that there is little indication or likelihood of success for a backlash from

within the network that might question the use of such measures and therefore the continued escalation of legal measures of control is likely. Going back to the literature on legal approaches to ambush marketing, it can be noted that some scholars have questioned both the necessity and effectiveness of framing the fight against ambush marketing in a rigid legal context (e.g., Ellis et al., 2011b; Kendall & Curthoys, 2001; McKelvey & Grady, 2008) and the potential dangers of taking such stringent action with regards to the rights and responsibilities of other stakeholders (e.g., Grady et al., 2010; Palomba, 2011; Scassa, 2011). This discussion therefore indicates that network structure is at least partially responsible for the power and ability of the IOC and OCOGs to bring about the institutionalization of anti-ambush marketing legislation despite such potential issues and concerns.

Institutionalized brand protection and knowledge transfer.

In this study, it was noted that there are both formal and informal knowledge transfer tools that allow for the movement of practices and understandings about sponsorship and ambush marketing across the Olympic marketing network. Linking this to the above understanding of the suggested relationships between actor centrality, network density, and the process of institutionalization, it can be argued that the discussed knowledge transfer tools are the practical vehicles that facilitate diffusion of institutional logics and norms across the network. That is to say diffusion and acceptance of institutional logics and norms throughout the Olympic marketing network is, at least partly, accomplished using identified tools such as technical manuals, debriefing sessions, and observer programs. It can thus be suggested that the strength and usefulness of these formal and informal tools will moderate (i.e., facilitate or impede) the formation

and diffusion and therefore institutionalization of a practice during both the objectification and sedimentation processes.

Furthermore, the above study notes several issues and challenges that may impact knowledge transfer, they are: (1) a lack of trust stemming from differences in purpose and goals among stakeholders; (2) a lack of interest in coordination for informal knowledge transfer purposes; (3) the indication that knowledge must be understood and applied in an international context that may limit its usefulness; and (4) a poor breadth of focus for knowledge transfer programs with some stakeholder, particularly NOCs, getting very little, that may impact the transfer of Olympic ambush marketing information across the network. It is argued that through their potential influence on the transfer of knowledge in the Olympic marketing network these challenges may also, indirectly, impact the processes of objectification and sedimentation. For instance, if the beliefs and practices favoured by influential stakeholders, such as the IOC and OCOGs, are tempered by a lack of trust in their goals, it may impact the way in which the information is passed on by the provider and/or understood and considered by the receiver thereby affecting its ability to become an institutional logic among these stakeholders.

Visualizations of the relationships discussed in this section are outlined in Figures 6-7 and 6-8 as an extension of Figures 6-5 (see p. 187) and 6-6 (see p. 188). The issues and challenges that have been identified are shown as potentially impacting the transfer of knowledge while formal and informal knowledge transfer is shown as moderating the relationship between betweenness centrality and institutional logics, and actor centrality, network density, and the diffusion and acceptance of norms.

FIGURE 6-7. Relationship Between Networks, Objectification, and Knowledge Transfer

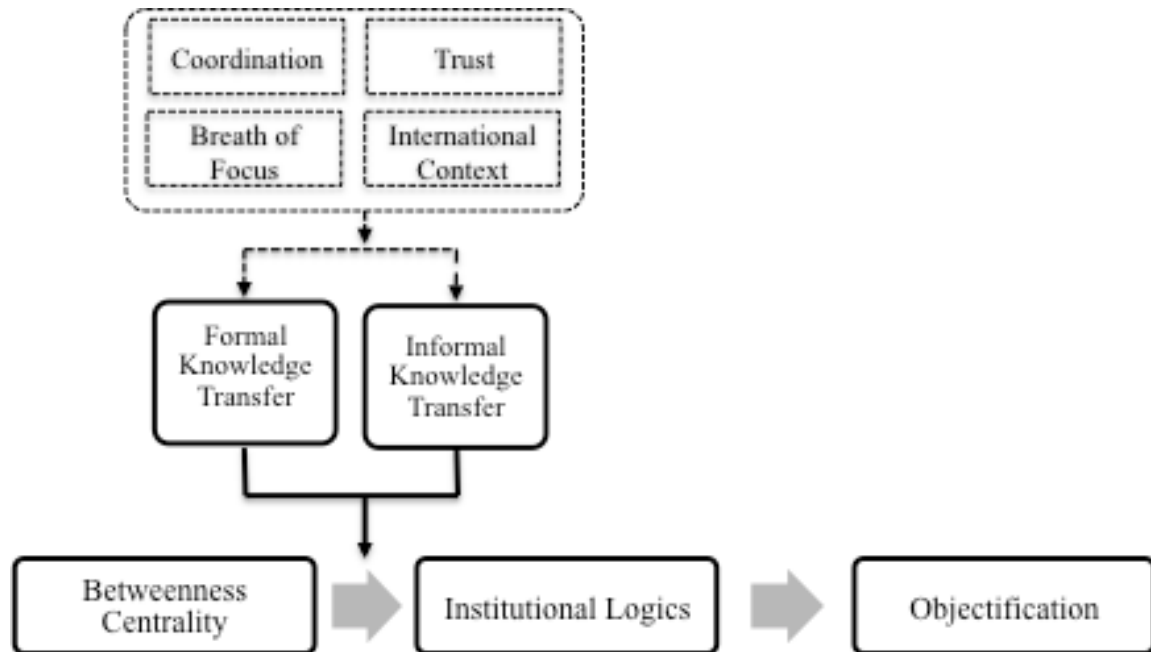
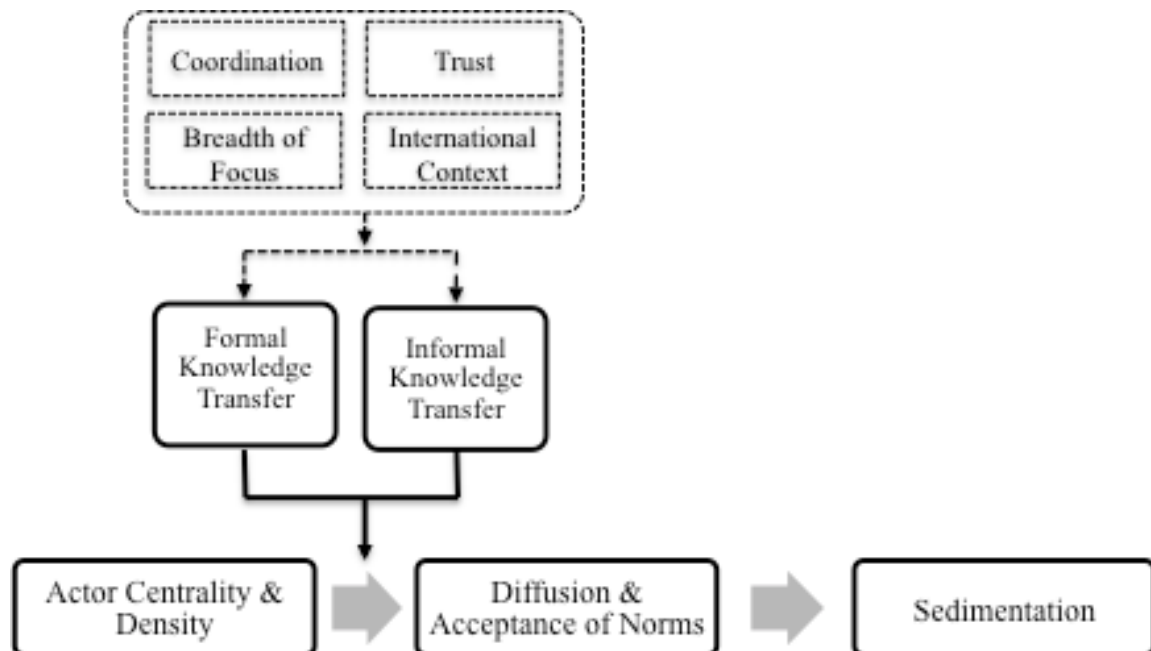


FIGURE 6-8. Relationship Between Networks, Sedimentation, and Knowledge Transfer



Chapter 7: Study III - Anti-Ambush Marketing Legislation and Institutionalized Brand Protection: Impacts and Implications

Results and Discussion

The institutionalized use of anti-ambush marketing legislation is now a reality within the Olympic Movement. With this in mind, it is important to take a closer examination of what this might mean for the Olympic Games, sponsors, other mega sporting events, and the people and organizations which impact, and are impacted by, the hosting of the Olympic Games. This section took a contemporary approach to this issue and examined the practice most specifically with regards to the Vancouver Games and the Olympic and Paralympic Marks Act (OPMA), while also looking forward. The following research questions were addressed: (1) What are the marketing implications of such legislation? (2) How might the effects of such legislation influence people and organizations? (3) What are the potential global precedents for future brand protection and sponsorship practice related to global isomorphism and ‘mega-event martial law’?

Marketing implications of anti-ambush marketing legislation.

Two main marketing implications of anti-ambush marketing legislation were evident in the data. The first was that legislation plays a role as a piece of a larger regime of Olympic marketing and protection practices, rather than as a standalone strategy; and secondly, that the public relations implications of such measures must be considered.

Legislation as part of a larger brand protection regime.

When looking at the direct impact of anti-ambush marketing legislation on the marketing and sponsorship practices of Olympic marketing stakeholders, it was observed

that, for the most part, there was no perceived impact. That is, there was nothing that directly changed within the planning and implementation of marketing programs as a result of the existence of such protection. As one interviewee noted when asked if their marketing practices were affected by the legislation: “I mean it makes one realize that there is ostensibly a greater level of protection then one would normally get but in terms of relaxing and thinking you are not going to get screwed, no” (AGN2).

It is important to note that, although there was argued to be no direct implications for marketing practices, there seemed to be agreement about the general importance of such legislation with it described as “necessary for the commercial success of the Games” (OCOG2) and “the only way to control full protection for the eventual Games” (IOC6), among other descriptions. It was also suggested that perhaps, despite the success of VANOC’s brand protection program, the OPMA did not go as far as some within the IOC and NOC feel to be required given its perceived importance. While the LOAR, which is discussed in Chapter Two, perhaps addressed some of these perceived inadequacies, the continuing need to develop and strengthen legislative means for brand protection provides further confirmation that, among many Olympic marketing stakeholders (as described in the previous chapter) at least, anti-ambush marketing legislation is felt to be very important, despite its limited direct impact on overall marketing practices, and as a result cannot be overlooked.

In order to understand why it is felt to be so important despite little direct impact on marketing practices, it can be argued that most stakeholders considered the impact of anti-ambush marketing legislation with regards to its integral role within a larger brand protection regime rather than its individual impact. Results suggest that anti-ambush

marketing legislation was felt to contribute specifically to the speed of response, deterrence, value support, and education programs, which is discussed further below.

Speed of response to ambush marketing threats.

The nature of the Olympic Games (both winter and summer) as a biannual event lasting little more than two weeks ensures that there is a definitive period of time in which both the risks and rewards of ambush marketing are at their height. The window of opportunity for ambushers looking to link their company or product to the event coincides with the period of time in which the Olympic brand is in the forefront of public consciousness and therefore at its most vulnerable for unofficial associations to be made. With this in mind, it is unsurprising that results showed there was a perception that anti-ambush marketing legislation was a key tool in allowing for ambush marketing issues to be dealt with in an extremely timely fashion. The importance of speed in responding to ambush marketing is highlighted by one interviewee who explained that:

A good thing is that there can be quick action to close down any of these ambush marketing cases because, if this happens during the Games and it take you two weeks, the Games are over and the damage is done so the key element is that you want some mechanism...so that if there is a case it can be heard immediately and an injunction can be put into effect or other action can be taken immediately to put a stop to some of this ambush marketing activity. So that is a key, a key, a very key element. (IOC4)

This perception of anti-ambush marketing legislation as a vital mechanism for speed of response against apparent infringements suggests that part of the marketing implication

of such legislation is to reinforce the abilities of the OCOGs rather than replace other efforts or act as a primary tool.

Deterrence.

Deterrence was the second identified contribution of anti-ambush marketing legislation. Olympic marketing stakeholders, including sponsors and the host NOC, noted that, although not the sole purpose of the legislation, part of the success of VANOC's commercial rights management program could be attributed to the deterrence provided by the knowledge that such legislation exists in combination with their other program elements. As discussed in Chapter Five, there has been a move towards a proactive approach to fighting ambush marketing in the Olympic movement. The fundamental concept of a proactive approach is deterrence, and so it is unsurprising that anti-ambush marketing legislation has become an institutionalized practice given its perceived role as a deterrent. It can be argued that the key implication of such deterrence for Olympic marketing practices is that such legislation can potentially help avoid incidental ambush marketing or sway the judgments of those companies who are considering the practice despite apprehensions and therefore decrease the number of ambush incidents. Consequently, the argument can be made that this may help not only avoid marketplace clutter and potential commercial harm, but also free up resources, both human and economic, to fight against those ambush cases which are more sophisticated, and therefore more likely to pose a commercial threat to sponsors and the Olympic brand.

Property value.

As part of a larger protection program, anti-ambush marketing legislation was also felt to provide support for the long-term value of the Olympic property both in the

context of the Games and in the support of NOC initiatives and related national support for athletic programs. From the perspective of the Games (i.e., the value of Olympic TOP sponsorship), it was suggested that in order for the property to retain and continually increase its value, the level of protection offered also needs to continually increase. Anti-ambush marketing protections are arguably demonstrative of this continued commitment to enhance the level of protection offered. For instance a sponsor stated:

Without that protection it would be very hard for the IOC to say ‘ok, are you going to sign for the next 20 years?’ A sponsor like us would come back and say ‘yes, but the value has just gone down if you can’t protect us.’ (SPO1)

The capability of the IOC and OCOGs to demonstrate to sponsors their commitment to protection through such stringent measures as legislation helps support the long-term global value of the Olympic property. Similarly, at the national level, it was argued that the marketing implications of such legislation related to the value of the Olympic property extend beyond the life of the legislation. When discussing sponsor protection, one respondent noted that it was important for organizations such as NOCs to “help to establish a framework that is favourable to corporate support of amateur sport” (OCOG2) in their own country. For instance, the ability of NOCs and OCOGs to demonstrate that they are willing to work with the government to lobby for legislation in order to protect sponsors, as demonstrated by the required government guarantees in candidature files, is something that could then positively impact their ability to recruit and retain sponsors in the future.

It must be noted that, although expectations for continually increasing, levels of protection may, and theoretically should exist, in practice, it will likely become more and more difficult for the Olympic property to meet these needs. Beyond using the law, there is little the IOC or an OCOG can do to force ambushers to comply with their guidelines and expectations. As a result, the argument could be made that rather than increasing the level of protection pledged and made available, it will force the Olympic movement to go back to the basics of protection (i.e., education, naming and shaming, crowd surveillance). That is, placing greater emphasis on other, more manageable and flexible, strategies which have been proposed in the literature (e.g., Séguin & O'Reilly, 2008), such as education programs to increase the knowledge and understanding of the general public and business community, increased activation, integration and cooperation, managing sponsorship program structure, and sponsor recognition programs. This furthers the argument that legislation is, but one of the pieces in a larger regime that will continue to increase in size rather than the big solution to the problem of ambush marketing. This is further demonstrated in the next section, as with regards to education at least, there is still a high awareness of the importance of other such strategies.

Education.

The final role of anti-ambush marketing legislation as part of the larger regime of Olympic marketing and protection practices rests with its seeming value as an educational tool (i.e., though the creation and communication of clear guidelines using brochures, conferences, letters etc.). The importance of education as a part of a comprehensive anti-ambush marketing campaign has been noted in the literature (e.g. Ellis, et al, 2011b, Séguin & O'Reilly, 2008) and was evident in the results. However,

the further function of anti-ambush marketing legislation as an educational tool provides the greatest interest in the context of this discussion. The results suggested that legislation was viewed as a significant way to educate the marketplace (i.e. local businesses, community organizations and the public) about the expectations and approach to ambush marketing that would be taken, as well as to simply make them aware that what they are doing might be against the law rather than just harmless opportunism. For example, one interviewee noted its use for educating the public arguing “it gives you the ability to firstly educate the market...and often that is the biggest part, that people just don’t know” (IOC2), while when talking about local businesses another stated: “another key thing [with regards to anti-ambush marketing legislation] is education...you have to say ‘hey you know you don’t have this right, it doesn’t go with the territory, these rights belong to the OCOG’” (IOC4). The value of anti-ambush marketing legislation as an educational tool in some countries is further supported by the literature. In a study by Ellis et al. (2011a), Canadian NSOs suggested legislation was important in teaching them what they could and could not do in the lead up to the Vancouver Games. Furthermore, the potential for legislation to facilitate the creation of other education materials was also mentioned. In the case of OPMA, one benefit of the legislation was described as “catalytic towards developing those public marketing guidelines, which was great” (OCO2). It must be noted, however, that it is important to consider context in such instances. For example, depending on their respective systems of government some countries, such as Canada, are more likely to promote and utilize education as a tool for fighting ambush marketing, while others may take a more autocratic approach. The importance of such contextual differences will be discussed in more detail later in this study.

Overall, the recognized importance of anti-ambush marketing legislation as merely one part of a broader system for protection, as discussed above, reinforces suggestions in the literature (e.g., Ellis et al., 2011b; McKelvey & Grady, 2008) that it is important for the IOC, OCOGs, and bid cities going forward to recognize that, despite stringent protection offered by legislation, there is still much to be done outside of the legal framework to protect the Olympic brand.

Public relations backlash.

The second marketing implication of anti-ambush marketing legislation that emerged from the results relates to an understanding of the need to consider and manage the public relations concerns that might arise from the creation and application of such legislation. In consideration of such concerns, it was noted that OCOGs and others who are interpreting and applying legislative restrictions must avoid a black and white approach. In a subject area like ambush marketing, which is defined by grey areas, the interpretation of such laws should be demonstrative of a similar flexibility in application if they are to stay clear of negative public perceptions. This was clearly stated by one respondent who argued that:

A fair amount of this needs to be driven by common sense. If you have an overzealous legal ambush team trying to close down the local Greek restaurant called Olympic that has been called Olympic for the last 40 years you will never ever win the public relations, public support battle. (IOC6)

This quote shows that, rather than creating an environment in which OCOGs and the IOC can rest on their laurels, it was felt that, within an effective and fair protection regime

(i.e., a regime which achieves its stated goals while taking a utilitarian approach in meeting the needs of the greatest number of stakeholders without alternatively significantly constraining or providing greater benefit to one over another), anti-ambush marketing legislation should create an increased need to monitor and consider the actions taken in the case of potential infringement. Arguably, the greatest danger in engaging in such a public support battle is that the OCOG and IOC risk negative public relations as a result of appearing to be bullies. This is particularly pertinent with regards to dealing with small businesses. As one respondent explained “throw a cease and desist at them and you end up looking like a bully sometimes, particularly if they are small companies who just kind of go ‘why can’t I do that?’ and they go to the press all the time” (NOC1).

The argument can therefore be made that, as part of the key marketing implications of anti-ambush marketing legislation, the need to manage public relations is evident. This was evident in practice during the Games. It was suggested by one respondent that, despite what they felt to be good work by VANOC with regards to commercial rights management, there was a feeling that, as the Games wore on, VANOC began to “abdicate” (NOC1) from their ambush related duties in order to avoid potentially negative public relations consequences. Although, as will be discussed below, it might be argued that this was sensible in the context of the Olympic and OCOG brand image, it was noted that, as a result, an issue may arise for those who must deal with sponsors on a more long-term basis (i.e., NOCs, NSOs, etc.). As with the above discussion of property value, this issue is arguably an illustration of the segregation which is suggested within the Olympic ambush marketing network outlined in Chapter

Six, which might indicate an isolation of NOCs (host and otherwise) and their resulting lack of position and power in the network and its decision making considerations.

The proper management and consideration of the public relations issues surrounding the use of anti-ambush marketing legislation is important because public relations is an important part of managing a brand (Aaker, 1991; Keller, 2003) and the overall acceptance and success of any anti-ambush marketing program (O'Reilly & Séguin, 2008). The importance of this is demonstrated as a stated goal of VANOC's brand protection program was to "return the brand in better shape than when we started with it" (Cooper, 2009, p. 8). Furthermore, in a moderately dense network, such as the one that characterizes Olympic marketing, the potential for negative public relations and brand consequences to affect many stakeholders through network diffusion is greater. Such concerns are important as this could potentially damage stakeholders' own brands and/or their willingness to be connected to the Olympic brand. With this in mind, the introduction of such legislation arguably places increased importance on managing and considering this area of the marketing function.

Effects of anti-ambush marketing legislation on people and organizations.

There has been much discussion about the potential impacts of ambush marketing legislation on the rights and freedoms of people and organizations (e.g., Grady & McKelvey 2010; Scassa, 2008, Geist, 2007). This study argues that Olympic marketing stakeholders felt the answer to such issues might rest with the need to strike a delicate balance in understanding, interpreting, and applying the law with respect to the rights and expectations of sponsors, the IOC, the corporate community, the public, and the media among others. This is discussed in more detail below.

Finding the balance.

Two key elements were noted with regards to finding the right balance in understanding, interpreting, and applying anti-ambush marketing legislation: the need to ensure the proportionality of response and the importance of managing expectations.

Proportionality.

Proportionality refers to the need for OCOGs to use their own reasoned judgment in applying anti-ambush marketing legislation. As was discussed in the section on public relations, the black and white nature that is typical of law is the antithesis of the predominantly grey area that makes up ambush marketing. The concept of proportionality suggests that the ambush marketing decisions made by OCOGs should take this grey area into effect and not judge an instance outside of its larger context specifically with regards to intentions and the potential for commercial harm. One respondent summed this up very well:

It means reacting in a proportionate way to the ambush, so I mean clearly sometimes there are...there may be things...that don't warrant a, kind of, full legal response...So I think you have to kind of look behind what is intended and then balance. So balance what is proportionate in terms of how much damage is there potentially being done and how serious was this, you know, how kind of planned and serious was this and what sort of risk does this represent to us in the event and then after you have to consider that in the context of the world we live in, which is marketing. (IOC2)

This quote demonstrates the concept of proportionality and what it means. Implicit in this understanding is the need for those interpreting legislation to assess the risk and likelihood of commercial harm resulting from the alleged ambush. It is perhaps the case that a small business engaging with the Games in a manner which might be an infringement, if one follows the most strict letter of the law with regards to anti-ambush legislation such as OPMA, does not offer any sort of threat to confuse the consumer about their association with the Games. In such cases, it is contingent upon the OCOG (or the concerned party) to recognize this fact and consider if further action is necessary or, alternatively, if it might be more harmful given potential negative public relations and the resources required to further pursue a claim against the infringer. It was suggested in the results that VANOC was successful in their program because they understood and applied such considerations in dealing the problem. It was also suggested by VANOC that this was a key piece of advice that they would give to other OCOGs, exclaiming:

That is my leading sound bite when I speak to London and Sochi and Rio, and it will continue to be my sound bite, that just because ...you have put a law in place that might give you the right to, or you might list a whole bunch of trade-marks over words like gold, silver and bronze you don't defend them just because you trade-marked them, you defend them because you should. (OCOG2)

Belief in this principle was also evident in the VANOC documentation that shows the considerations that were to be taken when carrying out an appraisal of potential commercial harm. In the first step of a two-step process, VANOC would determine if indeed an infringement had occurred in violation of OMPA. If it was found that such an infringement had occurred, the next step was to make an assessment of the need for

enforcement. The major themes that guided such an assessment were: (1) factually accurate use (i.e., for those that have the rights to use the marks determining if they were factually accurate in their use); (2) relevant use (i.e., were the marks used as part of a larger story rather than as an overtly commercial focal point); (3) commercially neutral (i.e., use has no association to business interests); (4) undue prominence; (5) general use of Olympic or Paralympic visuals (i.e., have they been used); and (6) unauthorized association (i.e., consider marks used in combination with other factors such as timing and placement) (VANOC, 2010a). This demonstrates that, in their intentions at least, VANOC paid attention to the wider context in which Olympic marks might be used; that is, they chose assessment over automatic enforcement. Given that technical manuals and other knowledge documents and process are updated after each Games, it is suggested that such a framework could be provided as a learning and may be adapted for use in future Games.

Expectations.

The management of expectations was the second element argued to be an important part of the balanced use of anti-ambush marketing legislation. It was felt that by providing many stakeholders with a clear understanding of OCOGs expectations, there would be less room for ignorance and discontent when the program was put into place. VANOC attempted to accomplish this by being proactive in their education and communications programs. These programs included specific guidelines for the media, community institutions, the local business community, and the general public which were distributed and published on the VANOC website in combination with information sessions. The management of sponsors' expectations was also noted to be important in

ensuring the balanced use of anti-ambush marketing law within VANOC's approach. Members of the IOC, the OCOGs, and the sponsors themselves noted the increasing level of sponsor expectation. With this in mind, VANOC determined that their ability to set and outline to sponsors a set of realistic expectations for what the OCOG could and could not do in protecting the sponsors' investment was key. Specifically, they sought to: provide clarity to the market and set realistic expectations among partners" (Cooper, 2009, p. 13), thus ensuring partners would not be surprised at their approach, or under the impression that the regime would carry out its function in any other way. Balancing the needs of the sponsors, the wishes of the community, and the desire to institute a fair and sensible program therefore was felt to rest on proactive education and the communication of these realistic expectations.

Ongoing concerns.

Despite the approaches outlined above, there continues to be concerns about the nature of anti-ambush marketing legislation and the potential negative consequences for people and organizations. Despite the argued recognition by the IOC and OCOGs that proportionality and the management of expectations are important for ensuring a fair and balanced use of anti-ambush marketing legislation, the main reason for concerns still existing is that, ultimately, the understanding and application of balance is purely dependent upon the subjective goals, character, and beliefs of the OCOG. In the case of Vancouver, it was argued that part of their marketing legacy "was their sense of understanding that there are some, kind of, broader or overarching national themes that are important, and then secondly, how to work out well-intentioned marketing campaigns, how they can be worked out to make sure there is no overlap" (IOC2). As this

suggests and as VANOC went to lengths to promote, it was felt among Olympic stakeholders that VANOC took a fair approach to the issue. However, not all OCOGs may operate in the same manner as VANOC. The fact that the application and interpretation of the law within each country is solely dependent on the OCOG ensures that there will be varying levels of balance and restraint displayed. Perhaps some future OCOGs will take a similar approach to Vancouver, but the concern lies with those who do not feel the same sense of duty to ensure that the rights of all stakeholders are considered. There may be those who apply the legislation to its utmost restrictiveness, as is their right. Related to this, questions should be asked about how, and by whom, those who are making such decisions are trained. While, as discussed in the previous chapter, there is an element of knowledge transfer related to such topics, the details of interpretation and application are seemingly left to the individual initiative of those in charge of brand protection. If they want and/or care about what the previous OCOG did, and why, they must seek out that information on their own. If they choose not to do so, there are few checks and balances in place to ensure they have sufficient competence in the subject matter and appreciate the need for a level of balance. Perhaps these questions suggest that a future direction for the increased protections sought in the above section on property value might lie with greater control over such matters coming from an IOC level. When television broadcasting was felt to be too disjointed from OCOG to OCOG, the IOC took total control over its production. Conceivably, a similar situation could arise with regards to brand protection, whereby the IOC specifically trains OCOG personnel and is directly involved in the creation of the OCOG brand protection programs. This may help ensure an increasingly uniform approach to the application and interpretation of

anti-ambush marketing legislation from Games to Games, but may also jeopardize the contextual considerations that are so important. For now however, as long as the interpretation and application of such legislation remains a subjective exercise, two of the major concerns outlined below must be considered with regards to the nature of anti-ambush marketing legislation and the potential negative consequences for people and organizations.

Engagement and atmosphere.

The danger of impinging upon the ability of the local business community and the citizens of a host city to engage with the Games is a real possibility. Engagement in the Games by such stakeholders is arguably part of what makes the atmosphere in the city celebratory and may contribute to the positive brand image of the Games. It was noted, “we really need these mega events to be beneficial to the local community, if you don’t have a fair and reasonable intellectual property regime then they are not beneficial to the local community” (OCOG2). No matter how diligent VANOC might have been in seeking to “balance excitement about the Games and Games related activities with the needs of communities and businesses while ensuring responsible stewardship of the Vancouver 2010 brand” (VANOC, 2010b, p.89), the reality of the situation is that the host city people and businesses are arguably the life of the Olympic party; they should not be forced into silence based on a lack of understanding and fear of legal costs. Related to this is the danger that the celebratory atmosphere in the host city, that does exist, becomes staged and overly commercial. That is, without the impulsive engagement of the community, the atmosphere in the host city might be entirely determined by the stories created and designed by those who have paid to associate themselves and their

own brand identity with the Games, the sponsors. Although such themes as 'Go World' as was put forward by Visa in Vancouver are positive and relatable, it can be argued that the true richness of the Olympic brand and surrounding atmosphere is greatly enhanced by the spontaneous feelings and spirit of the Games which emerges organically from the experience and is demonstrated in the local neighbourhoods and streets. If this is lost, so too is the true core of the Olympic brand, and perhaps the ability of the general public to relate to it in such a real and emotional way.

Impinging on freedoms.

Concern about the potential impact of anti-ambush marketing legislation on the basic freedoms of people should also be considered. This is not something that has escaped the notice of some within the Olympic movement. For example, an OCOG respondent specifically noted that:

Immediate injunctive relief, which is probably the hardest thing to get through, [is] about the most unpalatable piece of the legislation for everyone. Having been close to this area of business for years, for someone involved in advertising, or civil liberties or whatever it might be, that would probably be the piece of the legislation that caused them [someone involved in advertising or civil liberties] the most nervousness coming into it. (OCOG2)

Despite this understanding, however, this particular assertion was made as part of a statement that highlighted the perceived importance of this aspect of the legislation. This demonstrates that, for the moment at least, the importance of stringent protection has overridden such concerns in the mind of the Olympic stakeholders. This is further

enforced by the suggestion of one respondent who noted that “they [anti-ambush marketing legislation] go far and maybe too far...but in the lead-up and during the Games, it is legitimate to enact such type of laws or regulations because, otherwise, there could be severe damage, prejudice done to the marketing programs of OCOGs” (IOC4). These attitudes suggest that those OCOGs that feel the need to apply legislation in a more heavy-handed manner, may well find support within the IOC for such restrictive actions. Overall, this implies that the balanced approach of VANOC, while praised, is perhaps a suggested best practice rather than a certainty; and as a result, concerns will continue to exist about the dangers of restrictive anti-ambush marketing legislation on the freedoms of people and organizations.

Institutionalized brand protection going forward.

In Chapter Five, the suggestion was put forth that the use of legislation as brand protection has become institutionalized within the Olympic Movement. Looking forward to future brand protection practices, the argument can be made that although the complete global isomorphism of brand protection programs among OCOGs is unlikely given the individual character of the Games, the Olympic Movement can perhaps be described as an early adopter in the field of legislated brand protection in the larger mega-event field. The following sections will discuss why the individual character of an Olympic Games is a hindrance to complete isomorphism and explain the role of the Olympic Games as an early adopter with regards to the institutionalization of anti-ambush marketing legislation.

Individual character.

Given the institutional nature of Olympic anti-ambush marketing legislation, the potential for the global isomorphism of OCOG brand protection programs would seem to be a likely outcome. As discussed in Chapter Three, the state of institutional isomorphism is defined as “the resemblance of a focal organization to other organizations in its environment” (Deephouse, 1996, p. 1024) and is typically demonstrated by the appearance of similar forms, shapes, and structures within the organizations of a given field. Institutional researchers argue that isomorphism is the natural outcome of institutional processes and has been shown to be an important contributor to legitimacy (Deephouse, 1996). Results of this study suggest, however, that in the case of the Olympic Movement, complete global isomorphism of brand protection programs among OCOGs is unlikely given the prominent and valued individual character of each Olympic Games. Although the structure of each organization in this regard may be homogenous, through the fact that all brand protection programs will consist of specific and wide-ranging anti-ambush marketing legislation in the host country, the exact practices associated with it will likely continue to vary. The argument that institutional understandings such as isomorphism may not apply in the same manner within Olympic organizations given their international character also provides further support for the assertion in Chapter Five that more consideration must be given to the level of variances in implementation at the fully institutionalized stage when discussing Olympic organizations. This individual character is a result of both the nature of the Games and the nature of each country, in which it is hosted, as will be discussed below, and these

elements have an impact on the interpretation and application of anti-ambush marketing legislation.

Nature of the Games.

Nature of the Games refers to the fact that each country's individual character, image and identity is unique (i.e., Vancouver is known as a laidback, outdoorsy, mountainous place, while Rio de Janeiro is known for Latin flavour, beaches and Carnival). These associated images reveal the persona of the place and its people, and are typically reflected in the atmosphere and approach to the Games. Results suggested that the Olympic Games were felt to be unique, even from other sport events in their back-of-house composition (e.g., OCOG structure, policies, and procedures) and thematic flavour (e.g., the individual identities of host countries for each Games). They are not felt to be a 'cookie cutter franchise' type of event, and the international reach combined with local personality is what makes them truly special. This was best described as follows:

The Olympic is not like the World Cup with identical presentation and structure each time. Part of the strength comes from bringing out the local character, style, flavour, energy of the host country, and it is a marriage of the depth and history of the Olympic brand with the new dynamic of the host country. (IOC6)

With this in mind, it is unsurprising that an approach that might work in one country will not have the same effect in another. Furthermore, attempting to apply isomorphic practices may threaten to suppress the local flavour that defines and differentiates each Olympic Games between each other and from other mega-events.

Nature of each country.

Within each host country, the approach of the OCOGs, the public perceptions of such measures, and the authority and desire of the government to create a structure of control through legislation, are suggested to be impacted by the nature of each country, defined by the particular social and legal frameworks in place. From a legal perspective, this might refer to the way in which the division of powers within a government can impact their capacity and degree of control over Olympic property protection. Ellis et al. (2011b) suggested this is evident in the difference between the approach of the Canadian Government to OPMA and the British Government to the London Olympic Games and Paralympic Games Act (LOGPGA). From the perspective of social frameworks, the position of the marketplace with regards to intellectual property rights protection, and the culture, attitudes, and knowledge of the general public were elements which emerged as having an impact on the approach taken to the creation and implementation of anti-ambush marketing legislation. For instance, it was mentioned that in “China, the market was a bit different simply because there was a different culture and a different approach to rights and trade-mark rights” (SPO1). This supports the conclusions of Séguin et al. (2008) who found that culture plays a role in the perception of ambush marketing; but more specifically, it suggests that the potential for isomorphism among all OCOGs on this matter may be negatively influenced by the nature of each host country.

The IOC as an early adopter of anti-ambush marketing practices.

It has been suggested within institutional theory that the role of early adopter is typically taken on by an organization within a field that has the prestige and legitimacy to deviate from standard practices and innovate (Scherer & Lee, 2002). In doing so, the

organization then legitimizes the practice for others within that same field, thus bringing about the institutionalization of the practice (Scherer & Lee, 2002). Despite the fact that the institutionalization of anti-ambush marketing legislation may not fall into the standard model of institutionalized practices with regards to isomorphism, results of this study suggest that it does fill a role as the early adopter. That is, although as noted in Study I, the practice has become institutionalized within the Olympic Movement, the Olympic Games have served, and will continue to serve as a leader in this regard within the greater mega-event management field. The introduction of similar types of brand protection legislation for other major events in recent years, including the FIFA World Cup, the Commonwealth Games, the Cricket World Cup and the Rugby World Cup, might suggest that the prestige of the IOC and the perceived success of their program has been noticed and has influenced the practices of others in the major event field. Results indicate that the role of the Olympic Movement in furthering the advancements in this area was important in two ways. The first has been to provide organizing committees with precedent that can be communicated to their own governments to help in securing their support. One respondent suggested that “you can go back and look at past legislation and you can see that there is a history of getting things done which I think makes governments more comfortable with it” (AGN1). It also serves to provide guidelines about how such legislation can be drafted in a way that is enforceable without a “tumultuous change to national law” (OCOG2).

The second role is that it has provided a template for understanding what is required to host and finance a mega-event that is fluid to adapt locally. This was described by one interviewee as “more the concept of a broader understanding of what it

takes to privately finance the staging, or, you know, the private commercial component of the staging of large-scale events” (IOC 2). The expectations of Olympic sponsors and the way in which the IOC and OCOGs have evolved in order to meet them demonstrates for others what may be expected of them, or what they can be doing in order to advance their own sponsorship program. From the perspective of sponsors, it might also serve to show them what is possible, and as a result, raise their expectations for protection forcing the hand of mega-event organizers.

Next phase of protection.

The concept of “mega-event martial law” seems to offer the next step in the evolution of Olympic ambush marketing protections. In New Zealand, the *Mega-Events Management Act 2007* (MEMA) was passed in order to protect the sponsors of both the Cricket and Rugby World Cups. This Act is different from previous anti-ambush marketing efforts as it does not cease to exist after the event; rather, it is put aside to be brought back to the forefront for the next mega-event, similar to the way ‘martial law’ is evoked in situations that require it. While some dangers of such an approach were identified, for instance the chance that it would not meet the changing requirements of mega-events over time and would therefore limit the ability to pass a law which actually answered to the organizing committee’s needs, generally it was suggested that such an approach was a good idea. It shows a serious commitment on the part of governments to ensure protection of mega-event sponsors as noted by one interviewee:

I think that is a great idea. I mean to have an Act on the shelf to get down when you need it, if they can do it, is great...It means you have a good starting point, a really

good starting point at the very least. If not then you have just got to reinvent the wheel each time (IOC4).

Although this quote suggests some within the IOC feel such a legal option is a good idea, there are potential concerns with such an approach that must be noted. For instance, if such a pre-existing law was available, the proper consideration might not be given as to whether or not it is truly needed in all circumstances. Different circumstances and expectations for different events means that not every mega-event might require a law in order to provide an effective anti-ambush marketing program. In such cases, the use of legislation could be seen as contrary to the idea of using the law because it is needed rather than because it exists. As one interviewee suggested: “don’t protect because you can but because you should, and if you find that you should, then defend it in a manner commiserate with the case at hand” (OCOG2). Another concern with the creation of ‘mega-event martial law’ is that it may lessen some of the advantages of such legislation that have been noted. For instance, the use of legislation as an educational tool, as discussed in this study and in the literature (e.g., Ellis et al., 2011b), is partly dependant on the publicity given to the passing of such measures. Finally, and also related to publicity, is the danger that mega-event martial law will be able to hide, or at least make the measures less visible and therefore make the process less transparent. Permanent laws might suggest an acceptance by governments that the need for such measures is beyond doubt. This limits the opportunity for public consultation and the questioning of such measures by opposition groups by circumventing the consultation phase each time such measures are argued by organizing committees to be required. Despite these concerns, although the initial concept may not have originated within the Olympic Movement, the

suggestion can be made that if the IOC adopts a similar structure as the way forward, which would seem probable, it is likely that the institutionalization of this program with the Olympic Movement would see the IOC once again act as the early adopter in the institutionalization of the practice within the larger mega-event field.

Chapter 8: Discussion and Conclusions

The overall purpose of this dissertation was to present an integrated conceptual framework for ambush marketing in the Olympic Games. This has been accomplished in two ways. The first involved the use of institutional theory, supported by other established organizational theories, as a lens through which to view and understand the evolutionary process that has taken place in Olympic sponsorship and ambush marketing. This has been examined both as it happened in the past and as it is currently occurring. The second involved the use of grounded theory techniques (Charmaz, 2006; Glaser & Strauss, 1967) to build a conceptual framework of ambush marketing from the emergent findings. To serve this purpose, this dissertation consisted of three interconnected studies that will be considered together in this discussion.

Study I

The objective of Study I was to examine the process of institutionalization in the evolution of Olympic sponsorship and ambush marketing practices during their most critical periods of growth. As such the following research questions have been examined: (1) How have Olympic sponsorship and ambush marketing practices evolved over the last 35 years?; (2) What are the precipitating jolts, facilitators and barriers of this change? and; (3) How have they impacted processes and states of institutionalization?

Answering to the first two research objectives above, three key periods of change for sponsorship and two for ambush marketing were identified. With regards to sponsorship, the practice was initially argued to go through a period where the Olympic property was developed as a result of shifting attitudes and an increasingly stringent approach to Olympic emblem control. This set the foundation for the growth of a

commercialised sponsorship program. The precarious financial situation of the Olympic Movement and the decreasing willingness of cities and governments to take on the financial risk of hosting the Olympics made such changes to the Games imperative to their survival. These issues coupled with an influx of individuals who recognized the importance and value of commercialising the Games in key decision-making roles within the IOC and associated Olympic field, allowed for this period of Olympic property development. The second phase of Olympic sponsorship advancement involved a sophistication of the practice. This was evidenced through a growing desire to create and control a sponsorship environment around the Olympic Movement, an enhancement in expertise and capacity of the area of Olympic sponsorship, and an increasing recognition of the need for mutually beneficial relationships between sponsors and the IOC, OCOGs, and NOCs. These changes came about largely as a result of the increasing money involved with the movement (i.e., financial stability of IOC, mounting cost of staging the Games, rising sponsorship investment, and large television revenues) as well as a strengthening influence of sponsors on the marketing practices of the IOC. Finally, it was suggested that the third stage in the evolution of Olympic sponsorship saw a period where the concept of an Olympic brand was realized. Early in this phase, this was evident in the explicit discussion and recognition of the Olympic Games as brand. This was swiftly followed by the implementation of brand management and brand protection practices as key functions of Olympic marketing. Precipitating jolts of this change were found in the increasing sponsorship knowledge and sophistication of the IOC, agencies, and sponsors alongside three key events: (1) a brand audit; (2) the over-commercialization of the Atlanta Games; and (3) the Salt Lake City bidding scandal.

Alongside the evolution of sponsorship, and key for the rest of this dissertation was a discussion of the two phases of ambush marketing evolution. The first phase was termed problematizing ambush marketing. It was noted that, during this phase, ambush marketing was positioned as a danger to Olympic sponsorship. It was also noted that it was typically the result of opportunity presenting itself to non-sponsors rather than part of a larger strategy, and that surveillance and the enforcement of anti-ambush strategies became part of the marketing function. The reasoning behind this evolution was felt to be the general parallel evolution of sponsorship and, more specifically, the granting of exclusivity to sponsors. The second phase of ambush marketing evolution took place alongside the development of the Olympic brand and signalled a sophistication of ambush practices. This is demonstrated in a variety of ways: increasing complexity of ambush marketing strategies and opportunities; the formalization of anti-ambush marketing strategies, and an increasingly proactive approach to fighting ambush marketing. These changes were brought about as a result, once again, of the parallel evolution of sponsorship, the tactical sophistication of both ambushers and those fighting ambush marketing, and increasing expectations from sponsors who want to protect their investment.

To answer the research question about how this is related to institutionalization, the focus moved specifically to anti-ambush legalisation. Using Tolbert and Zucker's (1996) framework outlining the process of institutionalization, it was argued that these stages corresponded to the evolution of sponsorship, ambush marketing, and, most importantly, anti-ambush marketing practices (as outlined in Figure 5-1 on p. 140). This relationship will be further discussed in the conceptual model to be presented later in this

chapter. Additionally, reflecting on institutional theory, specifically Tolbert and Zucker's framework and institutionalization in the context of the Olympic movement, two areas of interest were identified: the concept of time and variance in implementation. The typical notion of time was recognized as being incompatible with the realities of a temporary organizing committee. It was suggested that an organization such as an OCOG represents a microcosm of the entire lifecycle of a non-temporary organization; and as such, within organization theory, any conceptualization of time-based considerations applied to temporary organizations should reflect this. With regards to variance in implementation of an institutional process, it was noted that this might be increasingly moderated by factors such as competition and culture at the micro-level while continuing to experience low variance in implementation at the macro level. This suggests a need to make the distinction between micro and macro level institutional processes in temporary Olympic organizations.

Study II

The objective of the Study II was to examine how Olympic ambush marketing stakeholder power and transfer of sponsorship and ambush marketing knowledge may have influenced institutional processes toward the state of anti-ambush marketing legislation as institutionalized brand protection. This was addressed by examining the following research questions: (1) How does network positioning impact stakeholder power among Olympic ambush marketing stakeholders?; (2) How does sponsorship and ambush marketing knowledge travel across the Olympic marketing network; and (3) How has this influenced Olympic sponsorship practice most notably related to ambush marketing institutionalization processes?

To determine how network positioning impacts stakeholder power among Olympic ambush marketing stakeholders, network theory was applied. Centrality measures showed that the IOC and OCOGs demonstrated the greatest stakeholder power and influence within the Olympic ambush marketing network as a result of their positions within that network. In-degree and out-degree centrality measures suggested they are highly connected within the network, and as a result, have greater access to information and knowledge as well as the capacity to spread their own knowledge and opinions. They also have the greatest ability to exercise control over information and communication flows across the network, as demonstrated by betweenness centrality measures. Lastly, measures of eigenvector centrality indicated that the IOC and OCOGs could be considered as the most important network actors given their centrality with regards to their ties to other important actors.

The transfer of Olympic sponsorship and ambush marketing knowledge was recognized as being impacted by the above network structures and resulting control and flow of information. In addition, the tools and challenges of knowledge transfer were also examined to help determine how sponsorship and ambush marketing knowledge travel across the Olympic marketing network. While their effectiveness varies it was found that there are eight formal tools of knowledge transfer (i.e., extranet, technical manuals, official debriefing, official observer programs, seminars and workshops, final reports, research reports, and other documents) and four informal tools of knowledge transfer (i.e., OCOG presentations, sponsor information, agencies, and Olympic gypsies). It was also found that there were several unique challenges and issues with regards to the transfer of Olympic ambush marketing knowledge, namely trust and coordination

between stakeholders, the changes provided by the international context of the Games, and an imbalanced distribution of knowledge.

To conclude this study, the way in which network structures and knowledge transfer influenced Olympic sponsorship practice, most notably related to ambush marketing institutionalization processes, were examined. It was argued, using Tolbert and Zucker's (1996) framework as a guide, that the structure of Olympic ambush marketing networks impacts the institutional processes of objectification and sedimentation. The impact on objectification arises from the ability of certain stakeholders with high betweenness centrality to influence institutional logics. The effect on sedimentation results from the ability of stakeholders with high actor centrality and a network that displays both high centrality and high density to influence the diffusion and acceptance of norms. Lastly, the formal and informal knowledge transfer tools, as well as the challenges and issues faced in this area, arguably act as moderators for the above discussed relationships.

Study III

Study III examined the contemporary state of Olympic sponsorship as evidenced by institutionalized legislated brand protection. To attain this objective, the following research questions were addressed: (1) What are the marketing implications of such legislation?; (2) How might the effects of such legislation influence people and organizations?; and (3) What are the potential global precedents for future brand protection and sponsorship practice related to global isomorphism and 'mega-event martial law'?

This study used a contemporary lens to examine the institutionalized practice of anti-ambush marketing legislation. To begin, while the direct marketing implications of anti-ambush marketing legislation were argued to be minimal, it was felt that the practice represented a piece of a larger regime of protection practices rather than a standalone strategy. It was further noted, however, that the public relations outcomes of creating and implementing legislated brand protection must be carefully considered and managed as part of a larger brand management strategy for the OCOG and Olympic Games. The effects of anti-ambush legislation on people and organizations were also examined. It was suggested that Olympic marketing stakeholders felt proportionality and managing expectations was key to interpreting and applying anti-ambush marketing legislation in a way that limits its negative impact on people and organizations. That said there are ongoing concerns in this area. The fact remains that the interpretation and degree of implementation of such legislation are still subjective and dependent upon the objectives, character, and beliefs of the OCOG. There also continues to be concern about how strict legislation might impact community engagement and the atmosphere around the Games, as well as impinging on the freedoms of individuals.

Finally, applying the institutional lens and looking forward to the future of Olympic brand protection practices, it is anticipated that the individual character of each Olympic Games, particularly the nature of the Games and the nature of the country, will prove a hindrance to complete isomorphism of the practice. Despite this departure from standard institutional practices, the argument was also made that the Olympic Movement does fill the institutional role of an early adopter. It has been, and will continue to be, a leader in the mega-event field when it comes to anti-ambush marketing.

Conceptualizing Ambush Marketing

Emerging from the findings of this research project is a conceptualization of the ongoing evolution of ambush marketing in the Olympic Games. This is described as a conceptual framework in Figure 8-1 (p. 239). Firstly however, a theoretical summary is provided to briefly outline the way in which key researcher questions have been satisfied to advance the thinking around such a framework. This is followed by the developed framework, an explanation of the interactions suggested by the framework, and reflections on the future of ambush marketing in this context.

Theoretical summary.

The understanding of theory presented in the theoretical framework and suggested by Whetten (1989) argues that theory is both a describing and explaining phenomenon. Accordingly, there are three fundamental elements and five related researcher questions that should be considered when describing ambush marketing in accordance with the emergence of the presented conceptual framework. These are outlined in Table 8-1 to provide an overview of the how each area of the conceptual framework aids in developing these aspects of theory.

The framework.

A conceptual framework of the ongoing evolution of ambush marketing is presented in Figure 8-1 (p. 239). The framework offers a synthesized visual representation of the interactions and outcomes of the core results from each study of this dissertation. Broadly, it suggests the ongoing evolution of ambush marketing is, at least partially, impacted by, and an outcome of, institutional forces and considerations. In developing the model, each study was first considered in isolation and imagined as a

generalized figure representing the processes, relationships, outcomes and/or moderators as outlined in that study. In two cases, elements of this figure were presented as part of the results and discussion (i.e., Figure 5-1 from Study I and Figures 6-7 and 6-8 from Study II). When these individual understandings were considered collectively, the suggested interactions began to emerge and the framework took shape. This section provides an overview of the individual elements of the framework while the following section provides a discussion of interactions that emerged from the results.

TABLE 8-1: Ambush Marketing Theory

Aspect of Theory	Explanation (theory/concept/variable)	Results and Discussion
What	Terms related to growth of Olympic sponsorship.	Attitude; resistance; emblem control; finances; sophistication; mutually beneficial relationships; sponsorship environment; expertise; capacity; financial stability; influence; the Olympic brand; brand management; brand protection; brand consistency; complexity; formalization
	Terms related to growth of ambush marketing.	Problematizing; opportunistic; surveillance; enforcement; parallel evolution; commercial environment; exclusivity; tactical sophistication; complexity; formalization; fragmentation of responsibilities; proactivity; expectations; education; brand audit; over-commercialization; scandal; brand image; balance; institutionalization
	Network relationships that show relevancy	In-degree centrality; out-degree centrality; betweenness centrality, eigenvector centrality
	Network structures that are evident	- Small network size - Moderately high network density - K-core demonstrates single clique with two external actors
	Key knowledge transfer tools	- Extranet; technical manuals; official debriefing; official observer program; seminars/workshops; final reports; research - Reports; other documents; OCOG presentations; sponsor information; agencies; Olympic gypsies
	Challenges and issues faced by Olympics transfer of knowledge programs	- Lack of trust between OCOGs and the IOC - Long-term goals versus short term

goals

- Uneven desire and ability in autonomous coordination between stakeholders (to transfer or receive knowledge)
- International context negatively impacts the ability to generalize information from knowledge transfer
- Breadth of focus beyond OCOG as target for knowledge sharing is poor

Potential marketing implications of anti-ambush legislation

- No direct implications for marketing practices
- Legislation merely part of the regime for fighting ambush marketing
- Legislation felt to make significant contribution to: speed of response, deterrence, value of the Olympic property and education programs
- Increased need to consider and manage public relations backlash

Potential legal implications of anti-ambush legislation

- Need to strike a delicate balance in understanding, interpreting, and applying the law with respect to the rights and expectations of sponsors, the IOC, the corporate community, the public and the media among others
- Proportionality required in interpreting and applying legislation. Taking into consideration risk and likelihood of commercial harm
- Clear delineation of OCOG expectations to all stakeholders leaves less room for claims of ignorance and discontent.
- Ongoing concerns around the fact that the understanding and application of a balanced approach is purely subjective based on the goals, character, and beliefs of each

		individual OCOG
		• Also danger of impinging on the ability of the local business community and citizens of a host city to engage in the Games and create a celebratory atmosphere
How	Links between the evolution of ambush marketing legislation and the processes of institutionalization.	• The processes of innovation and habitualization are demonstrated as the required market forces were in place to initiate innovation of various methods for fighting ambush marketing, one of which was specific legislation, and almost immediately, imitation of this approach was evident among OCOGs and candidate cities despite there being no formal requirements for such measures. This represented the pre-institutionalization stage • The objectification process was evident in the fact that a degree of consensus among decision makers about the value of anti-ambush marketing legislation appeared to form and as a result implementation, or the promise of it became more widespread and permanent, indicating semi-institutionalization • Eventually the IOC became more explicit in their requirement of specific anti-ambush legislation in the bid phase. This led to complete diffusion of the practice among OCOGs, characterizing the sedimentation process and full institutionalization stage
	Links between stakeholder control and influence and institutionalization	• The structure of the Olympic ambush marketing network (i.e. centrality and density) suggests certain stakeholders, and the network as a whole, have been able to influence the institutional processes of objectification and

sedimentation through their ability to influence institutional logics and the diffusion and acceptance of norm across the Olympic ambush marketing network. This ensures the beliefs, knowledge, opinions, and practices that are most favourable to meeting the objectives of influential stakeholders are most likely to be those that become institutionalized

Links between knowledge transfer and to the process of institutionalization

- Formal and informal knowledge transfer tools are the practical vehicles through which the beliefs, knowledge, opinions, and practices of those actors with influence are transferred to the rest of the network that facilitates them becoming institutional logics, their diffusion through the network and acceptance as norms. Knowledge transfer therefore contributes to the move towards full institutionalization through mediating factors (i.e. institutional logics; diffusion and acceptance of norms) in the processes of objectification and sedimentation

Continued evolution of Olympic anti-ambush marketing legislation.

- Need to consider anti-ambush marketing legislation as part of a larger regime of brand protection, specifically contributing to the speed of response, acting as a deterrent, supporting the value of the brand, and assisting with education programs
- The IOC and OCOGs need an integrated brand management strategy to account for and manage any public relations backlash that may occur as a result of these measures
- The interpretation and implementation of anti-ambush

legislation is still subjective and dependent upon the individual OCOG

- Continued apprehension about how strict legislation might impact community engagement and the atmosphere around the Games, as well as impinging on the freedoms of individuals
- The key is finding the right balance in the interpretation and application of anti-ambush marketing legislation, specifically the need to ensure the proportionality of response and the importance of managing sponsor and other stakeholder, expectations

Impact of institutionalization on current practices and global isomorphism within OCOGs

- While there is arguably isomorphism with regards to the enactment of anti-ambush marketing legislation among OCOGs, the full global isomorphism of brand protection programs among OCOGs is unlikely. This is arguably a result of the individual character of the Games as defined by cultural, social, and legal identities of the varying host cities

Impact of the evolution of legislation institutionalization on the major sport event field

- It is suggested that given the institutionalization of anti-ambush marketing legislation in the Olympic Movement, the IOC may perhaps be described as an early adopter in this area. That is, the introduction of similar types of legalized brand protection for other mega-events in recent years might indicate that the prestige of the IOC and the success of their program has been noticed and has influenced the practices of others in the mega-event field

Why	Reasons for ambush marketing's evolution to its current point	• At various points over the course of its evolution, several events, people, issues etc. have facilitated the evolution of ambush marketing, including: the parallel evolution and sophistication of sponsorship; an increasingly commercial Olympic environment; the expanding global reach of the Games; the granting of exclusivity to sponsors; the formalization of methods and structures for protecting the Olympic Games from ambushers; the tactical sophistication of ambushers; increasing expectations of sponsors • The process of institutionalization itself is arguably provides an explanation of why ambush marketing has evolved to its current point. Through a desire to attain legitimacy, bid committees began to make promises that met or, in many cases, exceeded formal and expectations with regards to measures of protection in order to enhance their chance of survival as an eventual OCOG. In response to the perceived positive impact of these measures, decisions makers began to advance their thinking with regards to what should be required and use of such measures became more widespread, rather than innovative. Eventually anti-ambush marketing legislation became a taken for granted norm that every bid must explicitly guarantee and every OCOG must implement in order to ensure their survival and legitimacy
	Reasons for stakeholder power/control/influence	• Those stakeholders with high in degree centrality have a greater number of ties directed towards them and as a result they have

greater access to information from multiple and varying sources that they can easily access. It is also easier for them to set-up alliances with other actors

- Those stakeholders with high out degree centrality possess the greatest number of ties that are directed towards others in the network. As a result this suggests their opinions and knowledge will be more widely dispersed across the network
- Those stakeholders with high betweenness centrality have the greatest potential ability to control information and communication flows across the network. As 'gatekeepers' these stakeholders also have a greater ability to facilitate exchanges, diffuse information and exert greater control over the content and timing of the communications. Furthermore it may be easier for these stakeholders to manipulate, bias, impede, or prevent knowledge flows
- Certain stakeholders are able to derive importance from their ties to important others, as measured by eigenvector centrality as they have direct access to knowledgeable sources of important information

Importance of these stakeholder relationships for understanding the evolution of ambush marketing legislation

- The position of certain stakeholders and the resultant power and influence means they have the greatest ability to shape and control those ideas, practices, beliefs, and values that will go on to become institutionalized norms in a way that best suits their own goals and objectives and ultimately will become the standard for legitimacy in the organizational field. This

suggests the evolution of anti-ambush marketing legislation to an institutionalized practice is likely the result of influential stakeholders (i.e. the IOC and OCOGs) promoting its value and shaping perceptions about the concept in the way that most benefits their own goals and objectives

Importance of the institutionalization of legislation for examining the future evolution of ambush marketing

- Forthcoming phases of evolution will be built on the identified contemporary implications and considerations outlined in the model namely: legislation and other strategies as merely a piece of the regime; the need to negate, or prepare for and manage possible public relations backlashes as part of a larger brand management strategy; the need to find a balance with regards to proportionality and managing sponsor expectations; recognizing the challenges of subjective implementation; and the possibility of impinging on personal freedoms
- It is further suggested that network structures, stakeholder power, the transfer of ambush marketing knowledge, and other environmental influences will impact the development of institutional practices within the next phases of ambush marketing evolution. As a result, there will continue to be a legacy of modified isomorphism among OCOGs with regards to ambush marketing practices

Who

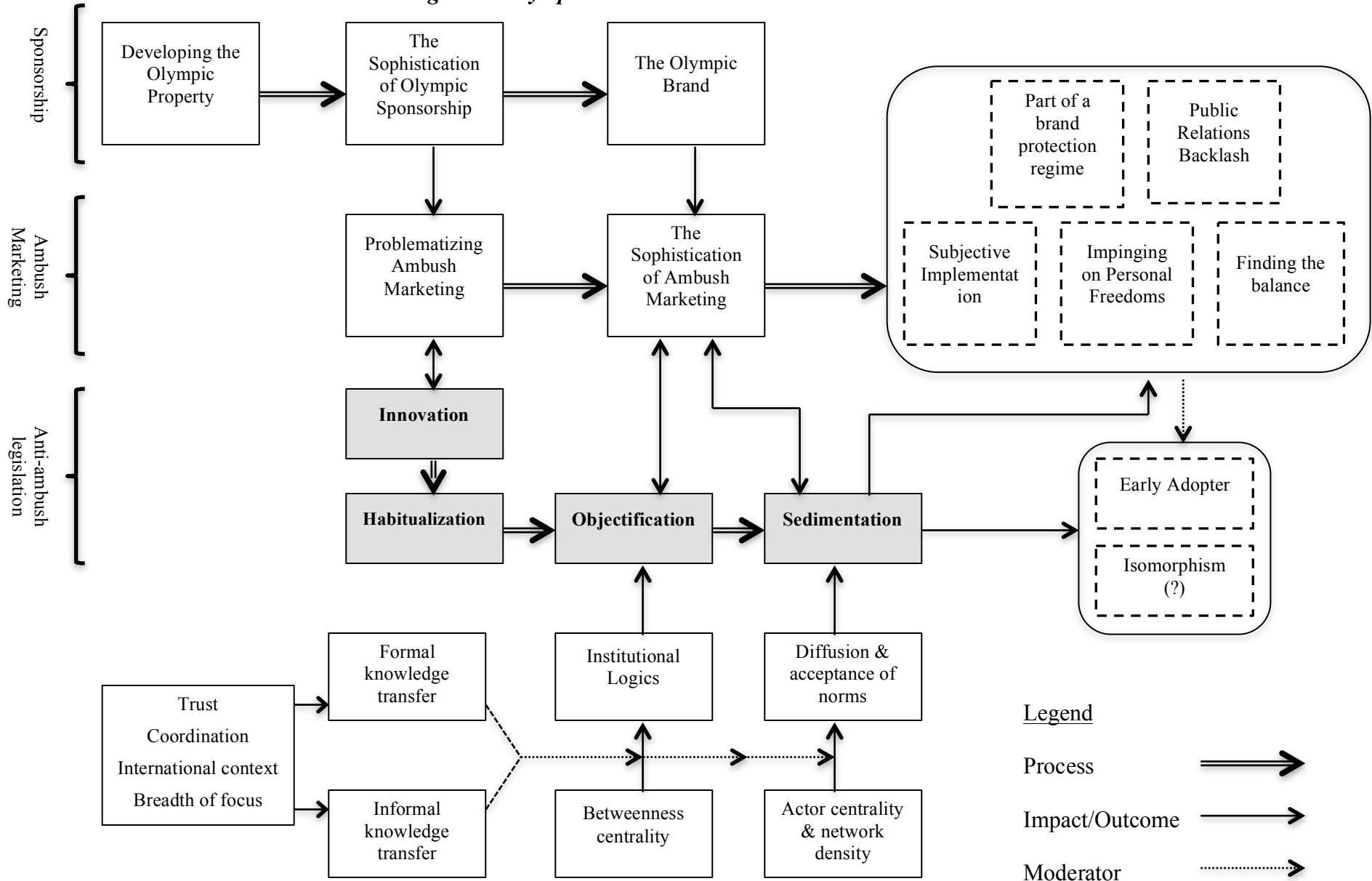
Stakeholders who affected change and institutional processes

- The IOC; its individual members and employees; WIPO; USOC; other NOCs; sponsors; past OCOGs; bid cities; host country governments; Horst Dassler

		(adidas); ISL; Meridian Management AG; ambushers
	Key ambush marketing network stakeholders	• The IOC; OCOGs; past OCOGs; host governments; host NOCs; NOCs; TOP sponsors; local sponsors; bid committees; agencies
	Key influencers	• The IOC and OCOGs are key influencers in the Olympic ambush marketing network • TOP sponsors and agencies are also influencers but to a lesser degree
	Additional stakeholders who may play a role in the continued evolution of ambush marketing.	• Citizens of host cities; host city businesses; host community organizations; members of host city legal communities who interpret and implement law (e.g., judges, lawyers etc.); global and local media; other mega-events and their related stakeholders (e.g., FIFA World Cup)
When	Time period over which the described evolution of modern Olympic marketing took place and ambush marketing took place.	• Development of the Olympic property (i.e. shifting attitudes; enhanced emblem controls): 1976 to 1984 • The sophistication of Olympic sponsorship (i.e. creation and control of the sponsorship environment; developing need for mutually beneficial relationships; enhancement of expertise and capacity in Olympic sponsorship): 1984 to 1996 • Problematizing ambush marketing (i.e. opportunistic tactics; surveillance and enforcement): 1984 to 1996 • The development of the Olympic brand (i.e. emergence and development of Olympic branding principles; application of brand management; emergence of brand protection): 1996-2010

	Time period over which the described institutionalization of ambush marketing legislation took place	• The sophistication of ambush marketing (i.e. increasing complexity; increasing formalization; development of a proactive approach): 1996-2010 • Pre-institutionalization stage (processes of innovation and habitualization): Began during the sophistication of Olympic sponsorship stage and continued to expand into Olympic brand development stage (i.e. Late 1980s to late 1990s) • Semi-institutionalization stage (process of objectification): Began during early Olympic brand development stage up to, but not including the Vancouver bid in 2002 (1996- early 2000s). • Full institutionalization stage (process of sedimentation): Began during middle of Olympic brand development stage and lasts to the present day (early 2000s to present)
	Beginning of formal transfer of knowledge programs in the Olympic movement	• Following the lead of the Sydney Games in 2000
Where	Countries which could be most affected by the continuing evolution of ambush marketing	• In the immediate future: Sochi, Russia; Rio de Janeiro, Brazil; PyeongChang, Republic of Korea; Istanbul, Turkey; Madrid, Spain; Tokyo, Japan. • At the very least the 204 member nations of the IOC • Potentially any city/country with the potential to host a sport mega-event

FIGURE 8-1. Ambush Marketing in the Olympic Games



Study I.

The core results from Study I are visually represented by portraying the stages of the evolution of sponsorship, ambush marketing and, most importantly, anti-ambush marketing practices as they arguably correspond to the processes of institutionalization outlined by Tolbert and Zucker (1996). As noted in the summary section above, within each broad stage of sponsorship and ambush marketing evolution, there are several, more specific elements and precipitating jolts that characterize this evolution. However, for the purpose of this framework, it is the link between institutional processes and these evolutionary stages that was most pertinent in the framework.

As suggested in Study I and shown in Figure 5-1 (p. 140), during the sophistication of Olympic sponsorship and the problematizing of ambush marketing, Tolbert and Zucker's (1996) processes of innovation and habitualization were evident in the development of anti-ambush marketing legislation. That is, the required market forces were in place to initiate innovation of various methods for fighting and preventing ambush marketing, one of which was various uses of legislation; and almost immediately, imitation of this approach was evident among OCOGs and candidate cities despite no formal requirement for such measures. This is evident in the framework as the sophistication of Olympic sponsorship and the problematizing of ambush marketing are shown as impacting the innovation and habitualization of anti-ambush marketing legislation. In addition, it must be noted that, as displayed in the framework, the innovation and habitualization of anti-ambush marketing legislation also arguably impacted the problematizing of ambush marketing. The early development and acceptance of such stringent measures provided further negative contextualization, and

therefore justification, for the problematization of the practice and the need for surveillance and enforcement.

Following on from this, Study I suggests the Olympic brand and sophistication of ambush marketing stages of evolution corresponded with the objectification and sedimentation stages of the institutionalization of anti-ambush marketing legislation. During these stages of sponsorship and ambush marketing evolution, a degree of consensus among decision-makers about the value of the anti-ambush marketing legislation appeared to form, with, for example, the IOC highly recommending such measures to bid cities and OCOGs. As a result, the implementation and/or promise of specific anti-ambush marketing legislation became more widespread and permanent despite no formal and explicit requirements that such measures be implemented, thus suggesting a process of objectification. Moving forward, but still during the sophistication of ambush marketing phase, the IOC became more explicit in its requirement of specific anti-ambush marketing legislation, necessitating a signed guarantee of such measures in the bid phase. This led to complete diffusion of the practice among OCOGs, characterizing the width Tolbert and Zucker (1996) argued to be observable in the sedimentation process. Furthermore, given that the practice had already endured through at least five ‘generations’ of the Olympic Games, the argument could also be made that it had achieved a level of depth reflective of the sedimentation process. The width and depth of the practice of implementing anti-ambush marketing legislation combined with widespread acceptance of the positive relationship between legislation and its desired results among pertinent stakeholder at that time suggests the practice was, at that point, fully institutionalized. These links between objectification and

sedimentation, and the sophistication of ambush marketing, are shown in the framework by the arrows representing the impact of the sophistication of ambush marketing on the objectification and sedimentation of anti-ambush marketing legislation. Like the previous relationship, there is also a reciprocal impact of semi and fully institutionalized anti-ambush marketing legislation on the evolution of the sophistication of ambush marketing. Two elements identified in the results as signifying the sophistication of the ambush marketing were the tactical sophistication of the practice and the expectation sponsors have regarding their protection from it. The widespread, and required, implementation of anti-ambush marketing legislation, as a result of its semi or fully institutionalized standing, lent itself to an increase in both elements.

Study II.

The core results from Study II are visually represented in the framework by showing the interconnection of network principles, institutional concepts, and elements of knowledge transfer. The described relationships from Study II are evident in the framework as both betweenness centrality, and actor centrality and network density are shown in the framework as impacting their respective factors in the institutional processes, that is, institutional logics and the diffusion and acceptance of norms. Moreover, the identified formal and informal knowledge transfer processes are shown as mediating these interactions, while the issues and challenges of knowledge transfer are presented as impacting upon the knowledge transfer process. These relationships are further described below.

Based on principles associated with network theory, it was argued in Study II that stakeholders with high betweenness centrality measures would be able to influence, bias, and manipulate information, knowledge, and opinions across the network. Given this ability, and in accordance with the understanding of institutional logics as the beliefs and practices a field's stakeholders hold in common, it is suggested that those actors with high betweenness centrality in a network are able to influence the institutional logics of their field by manipulating the content and flow of information across that network to suit their own objectives and promote their own practices to become the dominant institutional logic on a given issue.

Furthermore, it was argued that the diffusion and acceptance of norms required of the process of institutionalization could be impacted by actors who have power and influence as a result of centrality measures, and also by network density measures that can be suggestive of a network structure that facilitates such diffusion. With regards to centrality measures, those stakeholders with high out-degree centrality are highly connected to the network, and as a result, are able to ensure their knowledge is passed widely through that network. Those actors with high betweenness centrality facilitate the diffusion of norms through their ability to control information and communication flows across the network. Finally, the importance that is inferred by high eigenvector centrality together with the influence gained from betweenness and out-degree centrality promotes acceptance of the diffused norms by other network actors. Additionally, the impact of network density is seen alongside that of centrality and, as indicated by network theory, suggests the denser the network, the more efficiently knowledge and beliefs are passed

over that network. This allows for greater diffusion of those norms and the increased homogeneity of that network field.

The second part of the visual representation of Study II relates to the depiction of knowledge transfer tools, the impact of certain challenges and issues, and their mediation of the relationship between network structures and institutional processes. In Study II, it was noted that there are both formal and informal tools for the transfer of ambush marketing knowledge. It is suggested that these tools are the practical vehicles through which the beliefs, knowledge, opinions, and practices of those actors with influence as a result of network centrality, are transferred to the rest of the network that facilitates their becoming institutional logics and their diffusion through the network and acceptance as norms. It is noted, however, that the identified challenges and issues impact the effectiveness of such tools and that the particular tools of knowledge transfer are likely to evolve.

The above relationships are outlined in the framework. The dotted arrows connecting informal and formal knowledge transfer tools to the connections between the network principles and the institutional factors depicts the mediating function of these knowledge tools on the suggested relationships. The impacts of the identified issues and challenges are also demonstrated in the framework with arrows representing an impact going between the issues and challenges and both formal and informal knowledge transfer tools.

Study III.

The core results from Study III are visually represented in the framework by the inclusion of two boxes containing the key elements noted with regards to perceived implications of legislation on marketing, people, and organizations as well as potential precedents for future brand protection and ambush marketing practices.

The potential marketing implications are shown in the framework together with the suggested implications of anti-ambush marketing legislation for people and organizations. They are presented as a group representing the practical elements that may comprise the next evolution of ambush marketing. As described in the results and shown in the framework, the major marketing implications were felt to be two-fold. The first was the need to consider anti-ambush marketing legislation as part of a larger regime of brand protection measures. In this regard, it was felt to specifically contribute to the speed of response, act as a deterrent, support the value of the brand, and assist with education programs. The second suggested marketing implication is the need for the IOC and OCOGs to account for and manage public relations backlash that may occur as a result of these measures, as part of an integrated brand management strategy.

The potential implications for people and organizations are represented by three boxes, and indicated some areas of ongoing concern. The understanding and application of anti-ambush legislation is still subjective and dependent upon the OCOG and its interpretation and implementation. There also continues to be apprehension about how strict legislation might impact community engagement and the atmosphere around the Games, as well as impinging on the freedoms of individuals. Generally, however, it was

felt that the key in this area was finding the right balance in the interpretation and application of anti-ambush marketing legislation. Specifically, this speaks to the need to ensure the proportionality of response and the importance of managing expectations, both those of the sponsors and those of other stakeholders, ensuring they are well aware of OCOG expectations and how they would be applied.

The potential precedents for future brand protection and ambush marketing practices are shown in the framework as a group of two representing the potential theoretical outcomes of the institutionalization of ambush marketing legislation. The first is related to the institutional concept of isomorphism. The argument is made that complete global isomorphism of brand protection programs among OCOGs is unlikely. Rather, as discussed in Studies I and III, the existence of specific anti-ambush marketing legislation in all OCOGs is reflective of their homogeneity at primarily the macro level with some variance in implementation characterizing the practice at the micro level. This is a result of the individual character of the Games as defined by cultural, social, and legal identities of the varying host cities. The second precedent relates more widely to the mega-event field with the insinuation that the Olympic Movement can perhaps be described as an early adopter in the field of legislated brand protection perhaps leading to ‘mega-event martial law’.

The connection between the two aspects of the ongoing evolution of ambush marketing discussed in Study III is shown in the chart as a possible moderating relationship whereby the discussed implications are suggested to moderate the future precedents. This is demonstrated in the chart by a dotted arrow connecting the two elements of this chapter. The argument is made that, in addition to other factors, the

strategies and abilities of future OCOGs to manage the potential implications will help determine the likelihood and complexity of the suggested institutional precedents. It should also be noted that each of the boxes around the perceived implications and potential precedents are dotted. This speaks to the recognition that, although these outcomes are anticipated, they are still only reflective of what might be to come

Although this section examined the individual elements of the framework, the specific interactions between the three studies will be explained in more detail below.

Interactions between institutionalization, network structures, and impacts and precedents.

As depicted in the framework, the first interaction between the three studies conceptualizes the link between network concepts and the process of institutionalization. Arrows representing impacts/outcomes are shown as leading to objectification from institutional logics, as well as leading to sedimentation from diffusion and acceptance of norms. Support for these interactions comes directly from Tolbert and Zucker's (1996) framework for institutional processes. It was argued in Study II that actors with high betweenness centrality, potentially moderated by knowledge transfer tools and challenges, are able to influence institutional logics given their ability to impact the understandings, beliefs, and approaches of other stakeholders. Tolbert and Zucker's framework includes institutional logics as one element in the process of objectification. They suggest objectification is, at least partly, about powerful stakeholders shaping and validating institutional logics. This clearly rationalizes a link between the process of objectification as is happening within ambush marketing legislation and the network

concept of betweenness centrality, through the formation and impact of institutional logics.

It was also argued in Study II that both network density and actor centrality, were able to influence the diffusion and acceptance of norms with knowledge transfer tools and challenges suggested to moderate this relationship. High network density allowed from more efficient knowledge transfer and therefore greater homogeneity, while actors with betweenness, out-degree and/or eigenvector centrality possess the required network positioning to control information and communication flows across the network and foster acceptance of norms. Given Tolbert and Zucker's (1996) assertion that "identification of the factors that affect the extent of diffusion [...] is thus key to understanding the process of sedimentation" (p. 184), the theoretical support for an interaction between these network structures and sedimentation is therefore apparent. Overall, these outlined interactions suggest that the process of institutionalization is perhaps moderated and facilitated by network structures, stakeholder power, and knowledge transfer as shown in the framework.

The second interaction between the studies, as depicted in the framework, brings all three together. Three arrows portray this interaction, one denoting a continuing process of evolution and two outlining a key impact of institutionalization. The first interaction sees a double-lined arrow between the last identified phase of the evolution of ambush marketing, the sophistication of ambush marketing, and the grouped implications. This arrow signifies the proposition that this group of implications represents the next evolution of ambush marketing.

The second interaction sees a single-lined arrow between sedimentation (i.e., full institutionalization) and the theoretical ‘next steps’, that is, the IOC as an early adopter and the modified isomorphic consequences of institutionalization suggesting these elements are an outcome of sedimentation. It was noted in Study III that the complete global isomorphism of anti-ambush marketing legislation was unlikely and perhaps a modified version of the concept is to be expected. On the other hand, the argument is made that the IOC fills the role of an early adopter for the practice, serving as leader in anti-ambush marketing legislation among the mega-event field. The depiction of these two elements as the next steps in a post-sedimentary institutionalized environment is logical given that they are suggested to be key concepts in institutional theory. This is supported by Deephouse (1996) who suggested isomorphism is the natural outcome of institutional processes and a key contributor to legitimacy. Furthermore Sherer and Lee (2002) described an early adopter as an organization with prestige who is able to innovate and legitimate a practice thereby facilitating its institutionalization in field.

Finally, the full institutionalization of anti-ambush marketing legislation will have an impact on the future implications for marketing, people, and organizations going forward. This is outlined in the framework by an arrow showing sedimentation, the final process towards full institutionalization, impacting the grouped implications.

Conclusions

The overall purpose of this dissertation was to present an integrated conceptual framework for ambush marketing in the Olympic Games. This has been accomplished in two ways. The first involved the use of institutional theory, supported by other established organizational theories, as a lens through which to view and understand the

evolutionary process that has taken place in Olympic sponsorship and ambush marketing. The second involves the use of grounded theory techniques (Charmaz, 2006; Glaser & Strauss, 1967) to build a conceptual framework of ambush marketing from the emergent findings. This section will discuss the contributions of this dissertation, to theory, literature, and practice as well as the limitations to be considered, and the future areas of research that have been identified.

Contributions.

The three studies and conceptual framework outlined in this dissertation offer several contributions to theory, ambush marketing, Olympic, sport, and event marketing and management literatures, and practice. These are discussed below.

Contribution to theory.

This section discusses the contributions of this study to organization theory resulting from the uniqueness of temporary organizations considerations for temporary organizations as well as additions to the understanding of interactions between network theory and institutions.

Considerations for temporary organizations.

One contribution to theory rests in the discussion of how the unique context of a temporary organization might impact principles of organization theory. This manifested in two ways in Study I. To begin, it is argued that in examining the process of institutionalization within temporary organizations, specifically with regards to the diffusion of a practice, perhaps a more expansive definition of the notion of depth is needed which explicitly recognizes a potential disconnect between the conceptualization

of a generation and physical time. It is suggested that an OCOG, as a temporary organization, offers a microcosm of the entire lifecycle of a non-temporary organization; as a result, the conceptualization of time-based considerations within organization theory used to examine temporary organizations should more closely reflect this.

Secondly, when discussing the variation in implementation of institutionalized practices, it could be argued that within temporary Olympic organizations, this level of variance may be highly moderated by factors such as competition and culture at the micro-level (i.e., OCOG) while continuing to experience low variance in implementation at the macro-level (i.e., Olympic Movement). This suggests that recognition of the need for distinctions between the macro and micro level institutional processes in temporary Olympic organizations, and perhaps other temporary organizations, with regards to variance in implementation may be important and should therefore be considered. Special consideration should be given to addressing the interaction of temporary organizations with the institutional concepts of isomorphism and legitimacy.

Networks and institutions.

While there has always been an understanding that powerful actors influence institutional processes (DiMaggio & Powell, 1983), this dissertation contributes to the growing research agenda that seeks to bring together principles of network theory and institutional theory to discuss and examine their direct interactions (e.g., Owen-Smith & Powell, 2008). More specifically, it is argued in Study II that actor centrality and network density measures may be suggestive of those network actors and structures that provide the platform to not only form the institutional logics related to a practice but also to ensure that they are widely diffused and accepted as norms throughout the network, thus

ensuring their full institutionalization through the facilitation of objectification and sedimentation processes. This suggests a relationship between the network concepts of actor centrality and network density and the institutional concepts of objectification and sedimentation via their argued influence on institutional logics and the diffusion and acceptance of norms. This research suggests that an examination of the power and influence that some actors can arguably gain through their particular positions in the network and the way in which the network is then structured to transfer the preferred practices and understandings of these powerful actors may aid our examination of which practices and beliefs become institutionalized among all network stakeholders. This follows with Owen-Smith and Powell's (2008) contention that "core concepts in institutional and network theory are analytically richer and more useful when they take each other into account" (p. 599).

Contribution to literature.

While the specific contributions of this dissertation are most prominent in the area of ambush marketing, which will be discussed in the second half of this section, this dissertation's findings also contribute more broadly to the Olympic, sport, and event marketing and management literatures.

A particular contribution involves outlining an initial understanding of the importance and role of agencies in shaping and influencing the evolution of sponsorship and ambush marketing practices in the Olympic Games. Specifically, in Study II, marketing and management agencies were suggested to be a network actor whose high out-degree centrality and moderately high eigenvector centrality indicated their opinions

and knowledge would be widely dispersed and respected among the network. Following network theory, this is potentially indicative of their ability to have significant influence on the understanding of, and approach to, ambush marketing within the Olympic sponsorship network. Furthermore, agencies themselves were suggested to be important informal tools for sponsorship and ambush marketing knowledge transfer across the network. With many former employees of the IOC, OCOGs, sponsors, and ambushers starting their own consulting agencies, the knowledge gained through experience is then passed on to their Olympic clients (i.e., the IOC, OCOGs) providing knowledge on such topics as how to aid the passage of anti-ambush legislation and how to meet IOC expectations. Although the importance of agencies is discussed in this research as a function of the Olympic ambush marketing network, the argument can be made that perhaps the role of agencies as an influence in sport management and marketing more generally should be scrutinized in greater detail, as this is a subject that has been, until now, relatively unexamined.

On a more general level, further contributions to the sport and event marketing and management literatures were also made. For instance, within the sport context, there has long been a call for more qualitative methods in sport management (e.g., Silk, Andrews & Mason, 2005; Slack 1996) and sport marketing (Smith & Stewart, 2001). This dissertation contributes towards answering this call to provide a richer description and understanding of phenomena in these areas. Moreover, this dissertation also adds another facet to the growing application of organizational theory in a sport context (e.g., Friedman, Parent & Mason, 2004) through the use of network and institutional theory.

This is especially true with regards to the area of ambush marketing literature, which is discussed in more detail below.

Ambush marketing literature.

One key contribution of this research to the study of ambush marketing is an explicit recognition of the significant role played by the concept of exclusivity in the evolution and emergence of Olympic sponsorship and ambush marketing. To begin, there is a somewhat paradoxical relationship between exclusivity and the evolution of Olympic sponsorship and ambush marketing. While exclusivity is key in providing value to the Olympic property, its existence also creates an environment in which ambush marketing is a viable and useful tool, thereby necessitating the need to create programs that protect exclusivity. It was also suggested that exclusivity has added complexity to Olympic sponsorship by highlighting the need to determine clearly distinguishable product categories in a marketplace where this is becoming more difficult as large global corporations continue to expand their holdings into various industries. Finally, exclusivity has become recognized as an important part of proactively managing ambush marketing. It was argued that if OCOGs and the IOC are able to manage the expectations of sponsors with regards the level of realistic protection that can be offered for exclusivity, they will be better prepared to meet sponsor needs in this area.

From a broader perspective, this research adds a new dimension to the body of work that has been conducted in the field of ambush marketing. While the current body of descriptive studies have contributed to our understanding of ambush marketing, they are limited in their theoretical scope. This dissertation takes the discussion and analysis of ambush marketing to the next level, initiating this advancement through the use of theory

(i.e., institutional theory and network theory) as a lens for research and the development of a conceptual framework as an end product of the research. Building on this, it is the conceptual framework itself that offers the last, and most important, contribution of this dissertation.

The conceptual model presented in Figure 8-1 (p. 239) and explained earlier in this chapter, seeks to help explain the evolution of ambush marketing in the Olympic Games. It is proposed that forthcoming phases of evolution will be built on the identified contemporary implications and considerations outlined in the model namely: legislation and other strategies as merely a piece of a larger brand protection regime; the need to negate, or prepare for and manage possible public relations backlashes as part of a larger brand management strategy; the need to find a balance with regards to proportionality and managing sponsor expectations; recognizing the challenges of subjective implementation; and the possibility of impinging on personal freedoms. It is further suggested that network structures, stakeholder power, the transfer of ambush marketing knowledge, and other environmental influences will impact the development of institutional practices within the next phases of ambush marketing evolution. As a result, there will continue to be a legacy of modified isomorphism among OCOGs with regards to ambush marketing practices, and the IOC will continue to be identified as an early adopter of said practices within the mega-event field. The model suggests that these considerations should be taken as we move forward in examining the approach to ambush marketing in the Olympic movement.

Contribution to practice.

In providing a conceptual framework for ambush marketing, this dissertation offers practitioners a model for developing a deeper awareness and understanding of the phenomenon, thus allowing them to approach the issue from a position of greater strength going forward. They will hopefully be able to be more efficient and effective in their proactive attempts to protect themselves and their sponsors from ambush marketing in way that also protects the integrity of the Olympic celebration in a host city, and the rights and freedoms of all parties. This research also discussed several specific impacts, concerns, and implications of anti-ambush marketing legislation. As the practice becomes more prevalent, it will be important for all Olympic stakeholders to have a clear understanding of what such restrictions may mean for them. For instance, if forthcoming phases of evolution are built on the identified contemporary implications and considerations outlined in the model, it provides them with key understandings as they go forward with regards to how they may be negatively, or positively, impacted by such measures, and how their response might be tailored to meet these considerations in a way that is most beneficial for the greatest number of stakeholders.

Finally, OCOGs will be able to scrutinize how networks may be arranged to put them in a position of power relative to other members of their network, which may increase their ability to accomplish goals and attain resources. Furthermore, it offers numerous Olympic stakeholders the opportunity to gain a better understanding of how the innovative practices of some stakeholders grow to become accepted norms, while others, in spite of proven efficiency or effectiveness, may never take hold. As such, this research suggests to them that one key for stakeholders who wish to promote a practice or concept

in the field of ambush marketing appears to rest with either their own positions in a network or their ability to convince those in advantageous network positions to lend support to their idea.

Limitations.

It is important to recognize and account for the limitations of this study in order to ensure the findings are considered in their appropriate context. A brief discussion of these limitations is provided below.

Generalizations.

Given my position as a constructionist (see Appendix B), it is my assumption that Olympic marketing stakeholders have created the ‘object’ that is ambush marketing; and in studying this area from the perspective of these groups, I have come to understand what ambush marketing is and what it means in the context of the Olympic Games. With this in mind, it is important to explicitly indicate that this study does not seek to generalize beyond the context of the Olympic Movement. However, it should also be noted that in understanding the Olympic Games as a mega-event, and OCOGs as temporary organizations, it is hoped that elements of this study may be analytically generalizable to institutional theory and perhaps network theory as it applies to other temporary organizations and mega-event organizing committees. Future research may seek to determine if this is the case, while also taking it to the next level and attempting to use the conceptual framework developed in this study as a foundation for examining the evolution of similar practices in other mega-event fields such as the FIFA World Cup

or the Commonwealth Games. It is hoped that there is a level of transferability (Guba, 1981; Miles & Huberman, 1994).

Retrospective memory.

The limitations of retrospective accounts in organizational research have been previously documented in the literature. It is argued that some accounts may not offer a wholly accurate representation of past situations due to imperfect memory or attempts to cast past conduct in a more constructive light (Golden, 1992). It is therefore important to acknowledge that interviewees in this research might have portrayed reflections on past strategies and decisions in a more positive light than might otherwise have been applied. As such, in addition to this acknowledgement of the limitations of retrospective accounts, additional steps were taken to ensure that their impact in this study was minimal. Specifically, further methods identified by Golden, such as the use of multiple sources of data (both retrospective and archival) and the use of multiple respondents from an organization to examine the viewpoint of those in varying organizational roles, were employed.

Access to data.

An important source of data for this dissertation was archival documents from the official archives of the IOC in Lausanne, Switzerland. Although over 2,300 pages of documentation were copied and analyzed, access rules place a 20-year embargo on marketing materials, correspondence, contracts, and other confidential material, while the minutes of the Executive Board meetings are placed under a 30-year embargo. With these restrictions in place, materials were only available up to 1990 and 1980 respectively at

the time of data collection. Furthermore, while the researcher applied for access to the OGKM extranet system she was unable to get permission to view its contents (e.g., full debriefing reports and other knowledge documents). However, this study used multiple sources of data to enhance data collection and triangulation for the periods covered by the embargo. More specifically, interviewees were identified through purposive sampling to ensure they focused on the periods where the embargo impacted the availability of archival documents. In addition, there were numerous other official documents that were important to this study, but did not fall under the embargo. Final reports, bid manuals and evaluation reports, minutes of the IOC sessions, a technical manual and publicly available OCOG materials, among others, were used alongside the interviews to provide the required understanding of the more contemporary aspects of Olympic sponsorship and ambush marketing.

Future research.

Given the limitations of this study, as well as boundaries on the scope of the dissertation, suggestions for future research that evolved out of the analysis and discussion are presented below.

Extension of theoretical lens.

Although the use of institutional theory and network theory represents an initial contribution to the literature in ambush marketing and Olympic sponsorship, an extension of the theoretical lens in these areas will be important going forward. Some directions for accomplishing this are discussed in this section.

Deinstitutionalization.

Though I argue that the practice of passing anti-ambush marketing legislation in Olympic host cities is currently institutionalized, the argument can also be made that, in a dynamic context like the Olympic Games and particularly given such considerations as those taken with regards to differences in macro and micro level isomorphism, the potential for deinstitutionalization of the practice might also be an interesting area of future study. Oliver (1992) referred to deinstitutionalization as “the erosion or discontinuity of an institutionalized activity or practice” (p. 563). Specifically, she argued that political, functional, and social pressures at both the organizational and environmental levels may act as antecedents for the deinstitutionalization of practices (Oliver, 1991). For instance, changing power dynamics within the Olympic ambush marketing network, a declining recognition of the instrumentality of legislation as a deterrent for ambush marketers, or increasing social outcry and concern about overzealous protection might cause the stability of the institution of Olympic anti-ambush marketing legislation to falter. Further understanding and examination of such conceivable issues guided by Oliver’s framework offers the potential for noteworthy future study.

Power.

In this dissertation, the concept of power, as an aspect of organization theory, is superficially approached through its integration with network theory, and by extension, institutional theory. Although it was beyond the scope of this study to examine it in great detail, a major element in the discussion of power involves articulating the sources of both individual and organizational power. Like most other aspects of the concept, how

and why people or organizations come to acquire power in a given context, and how the use of that power impacts a given situation, is complex. In furthering the examination of the relationships outlined in this dissertation, researchers should take a more in-depth approach to these elements of the concept of power. Numerous organization theories attempt to provide a guide to, among other things, the acquisition, possession, circulation, and/or use of power by organizations (e.g., Lukes, 1974, Mitchell, Agle & Wood, 1997; Pfeffer & Salancik, 1978). Using such frameworks to discuss the interaction of power with the concept of ambush marketing would be another step forward for the research in this area

Knowledge transfer.

Although there are a few exceptions (e.g., Beis, Loucopoulos, Pyrgiotis & Zografos, 2006), knowledge transfer is a relatively untouched area of academic research within Olympic studies as it relates to marketing knowledge. As it continues to expand as a research topic within organizational theory, its application to unique contexts such as sport, temporary organizations, and marketing can only serve to strengthen the literature base. Argote, Ingram, Levine and Moreland (2000) identified four questions whose answers comprise the base understanding of the concept of knowledge transfer. Simply put, these questions include: (1) How is knowledge transferred?; (2) What factors act as a facilitator or barrier to this transfer?; (3) How can the structure of an organization be designed to promote knowledge transfer?; and (4) What are the economic performance implications of knowledge transfer? Though this study began to examine the first question, much more can be done going forward in an effort to speak to the other

questions and gain a better understanding of the transfer of Olympic marketing knowledge.

Furthermore, the integration of Olympic knowledge transfer and network concepts that was started in this study provides a very general platform for further research in this direction. As noted by Inkpen and Tsang (2005), in organization theory, there is a thriving body of research that recognizes and examines the linkages between the transfer of knowledge and networks. Networks are both a conduit for knowledge and a focal point for the creation of new knowledge (Podolny & Page, 1998). Future consideration of both the Olympic ambush marketing network and the transfer of Olympic marketing and ambush marketing knowledge should therefore provide a deeper examination of how networks formulate and/or channel vital Olympic marketing knowledge. Such research would also further contribute to the goals of integrating organization theory into the study of sport and event marketing and management.

Other areas of future study.

In addition to the extension of the theoretical lens, several other areas of interest emerged from the analysis and warrant further study. These are discussed below.

Examine socio-political elements.

The political and power considerations at play within the Olympic movement, and by extension in the practices around ambush marketing, offer the opportunity to study the phenomenon with a sociological lens in addition to the marketing and organization theory lens which have been applied in this dissertation. One approach could be to apply the lens of critical theory. Alvesson and Deetz (1996) define critical theory as:

All works taking a basically critical or radical stance on contemporary society with an orientation towards investigating exploitation, repression, unfairness, asymmetrical power relations, (generated from class, gender, or position), distorted communication, and false consciousness (p. 192).

This view might be examined as it applies to the institutionalized practice of anti-ambush marketing legislation and to the Olympic Movement more generally. For instance it is noted that the demographics of those individuals with power in the Olympic Movement are generally narrow. It is suggested that affluent, Caucasian males seemingly continue to dominate decision-making positions within the Olympic Movement and as a result exercise the greatest control over the response to issues such as ambush marketing.

While the importance of international context was discussed in this dissertation it is also an area for further study from a socio-political perspective. The political systems and related cultural norms of varying international contexts are suggested to impact upon the way in which ambush marketing is approached by various stakeholders, including governments, and the public. A deeper examination of the role of such varying contexts in the development of ambush marketing could be a beneficial addition to the literature base.

Finally, the increased involvement of governments in aiding the protection of Olympic sponsors through anti-ambush marketing legislation arguably goes against the IOC's claims that the Olympic Games are wholly separated from politics. Further examination and critique of this political connection offers an interesting area for future study.

Examine additional stakeholders.

The essence of the stakeholder approach is recognition of the importance of all stakeholders with a view to the need for managers to develop and understand strategy for dealing with each individual stakeholder (Freeman, 1984). It is noted that while this study sought to examine the involvement of primary stakeholders in the issue of ambush marketing in the Olympic Games, as defined by the network boundaries of Study II, there are other stakeholders whose involvement in the Olympic Games might see them impacting on, or impacted by, ambush marketing in some way. Arguably among the most important of these stakeholders are the ambushers themselves and the general public. To begin future research should seek out those companies who engage in ambush marketing, specifically those who do so as a matter of strategy, rather than just opportunism. Such research could aid in gaining an understanding about, among other things, motivations, expectations, impacts of legislation, and, perhaps, best practices among ambushers. In doing so it would also help provide further insight into the way in which ambush marketing has evolved from an opposing perspective, adding further depth to the presented framework.

There is also much to be considered with regards to the general public as a stakeholder in ambush marketing. While consumer knowledge and perceptions of ambush marketing strategy has been examined extensively (i.e., Koenigstorfer & Groeppel-Klein, 2012; MacIntosh et al., 2012; Mazodier, Quester & Chandron, 2012; Pitt, Parent, Berthon & Steyn, 2010; Séguin, Lyberger. O'Reilly, McCarthy, 2005), the perception of the general public (not just consumers) towards anti-ambush marketing legislation has not been comprehensively considered. For instance, research relating to

the perception of the public in regards to the breath, scope, interpretation, and implementation of anti-ambush marketing legislation warrants further study.

In addition, Study III discussed the need to consider and manage public relations concerns that might arise from the creation and application of such anti-ambush marketing legislation. Further research examining causes, impacts, and management of such a public backlash offers the opportunity for further insight into understanding and managing the phenomena of ambush marketing. For instance perhaps the stakeholder action (mobilization) framework (Rowley & Moldoveanu, 2003) could be used to examine the potential for action on the part of angry citizens in relation to concerns around the scope or interpretation of anti-ambush marketing legislation.

Examine the role of agencies

As discussed in the above section on contributions of this research, this dissertation has suggested that the role of agencies in the evolution and institutionalization of practices related to sponsorship and ambush marketing is perhaps worthy of further study. In examining the literature, there seems to be no studies that focus directly on this particular stakeholder and their role in shaping the practice specifically, and the field more generally. Further research examining their role and accounting for their influence could add a valuable dimension to the study of the Olympic Games and sport management and marketing stakeholders.

Examine the role of exclusivity.

The concept of exclusivity in Olympic sponsorship and ambush marketing, although widely acknowledged as fundamental, has never, itself, been an area of intense

study and scrutiny. Similar to the above discussion of agencies, the importance of exclusivity was highlighted in the results of this dissertation. It is suggested here that although this study offers an initial contribution towards understanding the important role of exclusivity, further research to highlight and understand this role in-depth seems a logical way forward.

New media and brand protection.

Outside the subjects and theories approached directly in this dissertation, the role of new media in the evolution of sponsorship and ambush marketing in the Olympic Games was a topic that was continually emerged when talking about the future of ambush marketing in the analysis of interviews. The analysis seems to suggest that, in moving forward with Olympic brand management and protection, careful consideration must be given to how new media provides both threats and opportunities in this area. Further research that explicitly examines the role of new media in Olympic sponsorship and ambush marketing is a logical step forward in this regard.

Extend/modify theories and conceptualization for other events.

Given the discussed issues of limited transferability with regards to this study, as well as the suggestion that the IOC may perhaps be described as an early adopter in the area of legalized brand protection for mega-events, it seems logical to suggest that future research should examine the role the conceptual framework developed in this dissertation may have in explaining or contributing to the understanding of other mega-event contexts (i.e. FIFA World Cup, Commonwealth Games etc.), specifically examining if similar processes of institutionalization are taking place, and if so, how are they impacting the evolution of anti-ambush marketing practices in those contexts. Furthermore, how, if at

all, might network structure influence the evolution of such practices in other mega-events? Finally, in discussing the special considerations that were argued for temporary organizations with regards to intuition theory (i.e., time and variance in implementation), are these applicable in other mega-event settings, or what might other settings be able to contribute to our knowledge about the special considerations for temporary organizations with regards to institutional theory?

Deeper focus on outcomes.

Finally, while some legal outcomes have been examined to a certain extent in the literature there is room for deeper analysis of the outcomes of implemented anti-ambush marketing programs in varying countries. This might provide insight into how anti-ambush marketing laws have been interpreted and used, their experienced and perceived effectiveness, as well as further supporting, developing, expanding the potential outcomes suggested in the conceptual framework.

Concluding remarks.

In conclusion, the purpose of this dissertation was to present an integrated conceptual framework for ambush marketing in the Olympic Games. Through the use of institutional theory and network theory, and the application of grounded theory building techniques, a conceptualization has emerged which seeks to provide a deeper understanding and suggested explanations for the evolution and current state of ambush marketing in the Olympic Movement. As the Olympic Games continue to grow in stature, cost, and sponsor expectations for exclusivity and protection, a deeper understanding and explanation of ambush marketing offers both practical and theoretical contributions. This

dissertation answers this growing need and provides a foundation for research in this area going forward.

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Appendix A

Sample Interview Guide

1. General Information

A. Name, title and number of years with organization?

2. Olympic Marketing and Sponsorship

A. How do you define sponsorship?

B. Do you believe Olympic sponsorship has changed over the years?

If yes:

- i. How has it changed?
- ii. Why do you believe it has changed?
- iii. When has it changed?
- iv. Have any major events impacted its evolution?
- v. Who (people and organizations) has been involved in the evolution of Olympic marketing and sponsorship?
- vi. Do you see any facilitators and/or barriers to this change?

Prompt for:

- Social
- Political
- Economic
- Technological

- vii. Are there any values, norms and/or beliefs which guide your organization's decision making in relation to Olympic marketing and sponsorship?
- viii. How have changing/evolving values, norms and/or beliefs within your external environment impacted your organization's view and/or actions related Olympic sponsorship and marketing?
- ix. How have the values, norms and/or beliefs associated with the field changed or evolved?

3. **Ambush Marketing**

- A. Are you aware of ambush marketing?
- B. If yes, how do you define ambush marketing?
- C. Do you have any experience:
 - i. As an ambusher? If yes can you expand on this?
 - ii. Being ambushed? If yes can you expand on this?
 - iii. Both? If yes can you expand on this?
- D. Do you believe ambush marketing has changed over the years?

If yes:

 - i. How has it changed?
 - ii. Why do you believe it has changed?
 - iii. When do you believe it changed?
 - iv. Have any major events impacted its evolution?

- v. Who (people and organizations) have been involved in the evolution of ambush marketing?
- vi. Do you see any facilitators and/or barriers to this change?

Prompt for:

- Social
 - Political
 - Economic
 - Technological
- vii. Are there any values, norms and/or beliefs which guide your organization's decision making in relation to ambush marketing?
 - viii. How have changing/evolving values, norms and/or beliefs within your external environment impacted your organization's views and/or actions related to ambush marketing?
 - ix. How have the values, norms and/or beliefs associated with the field or ambush marketing changed or evolved?

4. Closing Remarks Sponsorship and Ambush Marketing

- A. Is there anything else you would like to mention in regards to the evolution of Olympic sponsorship and ambush marketing?

5. Networks

- A. Can you please describe your organization's role as an Olympic marketing stakeholder?
- B. How did your organization become involved in this network?

- C. Did your involvement changed over time?
 - i. If so how and why?
- D. Did the network change/evolve over time?
 - i. If so how and why?
- E. Who is involved in this network?
- F. Where do you see yourself in this network?
- G. How much power do you feel your organization had in its Olympic marketing network relationships?
 - i. Where did this power come from?
 - ii. How did an organization in this network attain power?
- H. How did power affect the Olympic marketing network?
- I. How did legitimacy affect this network?
- J. What opportunities, if any, were you afforded by this network?
- K. What barriers/limits, if any, were placed on your organization by this network?
- L. Did your position or the position of others within the network impact interactions among stakeholders?
 - i. If yes, how?

Prompt for:

- Density (number of connection between actors in network)
- Centrality (comparative position in network)
- Strength of ties (how close actors to each other in a network)
- Bridging (a network tie that connects two separate groups of ties)

M. How did social economic, political conditions impact network structure?

6. Knowledge Transfer

A. How was marketing and sponsorship knowledge communicated over this network?

i. By your organization?

ii. To your organization?

B. What factors acted as a facilitator to this transfer?

C. What factors acted as a barrier to this transfer?

D. What were the indicators that a transfer of marketing knowledge had taken place?

E. Do you believe organizational structure promotes knowledge transfer?

i. If so, how?

F. Was/is the transfer of Olympic sponsorship and ambush marketing information viewed as important in your organization?

i. Why or why not?

G. Within your organization who was responsible for:

i. The acquisition of Olympic marketing/sponsorship/ambush marketing knowledge from the network?

ii. The transfer of Olympic marketing/sponsorship/ambush marketing knowledge to others in the network?

H. When did your organization first become involved in Olympic marketing/sponsorship/ambush marketing knowledge transfer (formally and informally if applicable)?

7. Closing Remarks Networks and Knowledge Transfer

- A. Is there anything else you would like to mention on the Olympic marketing, sponsorship and ambush marketing networks?
- B. Is there anything else you would like to mention on the transfer of Olympic marketing, sponsorship and ambush marketing knowledge from or to your organization?

8. Anti-Ambush Marketing Legislation

- A. Are you aware of anti-ambush marketing legislation?
 - i. If yes what do you know about it?
 - ii. Has your organization had experience with such legislation (i.e. as a lobbyist, consultant, ambusher, company being ambushed etc.)?
 - iii. What is your understanding of why it came to be?
- B. What, if any, do you believe to be the marketing implications (positive and negative) of such legislation?
 - i. For your own organization?
 - ii. For other Olympic stakeholders?
 - iii. Why do you think each implication you mentioned is positive or negative?
- C. What, if any, do you believe to be the legal implications (positive and negative) of such legislation?
 - i. For your own organization?
 - ii. For other Olympic stakeholders?
 - iii. Why do you think each implication you mentioned is positive or negative?

D. What do you foresee in the future for such measures?

i. Why do you believe this?

Prompt for:

- In your country?
- Around the world?
- In relation to the Olympics?
- In relation to other mega-sport events?
- On sponsorship practices?
- For your organization and other stakeholders?

E. Was your organization involved in the law-making process?

i. If yes, what was your role?

ii. If no, do you know other Olympic marketing stakeholders who were? If yes who and what was their role?

F. Was your organization required to make any promises in regards to anti-ambush legislation during the bid phase?

i. If yes can you describe the details of this promise?

Prompt for:

- Explicit promise or implicit understanding
- Parties in the agreement
- Reasons given for necessity
- Talking points provided

- Dangers if not fulfilled

9. Closing Remarks for Anti-Ambush Marketing Legislation

- A. Is there anything else you would like to mention in regards to anti-ambush marketing legislation?

Appendix B

Theoretical Perspective

Silk et al. (2005) recently noted that the “history of research design has been plagued by (an almost redundant) quest by various groups of scientists to prove that their way of conducting research is the correct, and thereby only, way to investigate the matter at hand” (p. 6). As such, it is important to begin by qualifying this section with the recognition that what is outlined represents my personal theoretical perspective and is not intended to make a statement about what is a ‘right’ or ‘wrong’ way to pursue research. As Miles and Huberman (1994) stated, there are still people much more qualified and experienced than myself still trying to sort out these issues; therefore, this section intends only to provide a picture of my particular stance and assumptions which underlie the research design of this dissertation. It is important to provide an understanding of the underlying theoretical assumptions for this research as they played an important role in framing which type(s) of data were collected, the methods by which data was collected, the way the data was interpreted, and ultimately the type of conclusions that are drawn (Gratton & Jones, 2004). While there is much debate and confusion over the definition, categorization, and interactions of the elements of one’s theoretical perspective (e.g., Burrell & Morgan, 1979; Denzin & Lincoln, 2005; Guba, 1990), I will follow those laid out by Crotty (1998). He separates the basics of one’s theoretical perspective, that is, their assumptions about reality and the resulting impact on research design, into five interconnected elements: epistemology, ontology, theoretical perspective, methodology, and methods (Crotty, 1998).

In the simplest terms, one's epistemology outlines, "how we know what we know" (Crotty, 1998, p. 8). It serves the philosophical questions that cover the arguments around the possibilities and boundaries to what humans can know (Rawnsley, 1998) and the connection between the knower and known (Silk et al., 2005). Crotty outlined three broad epistemological views, objectivism, subjectivism and constructionism, each of which also offers a host of variations. Objectivism can be described in three main tenants. To begin, an objectivist believes truth and meaning exist within an object, making it a "meaningful entity"; this is connected to the belief that there is an ultimate truth to arrive at, and it is possible to get there through proper research techniques; and finally, the belief that the ultimate truth and meaning of an object exists completely apart from individual consciousness or experience (Crotty, 1998). Subjectivists, on the other hand, reject the notion of objects as inherently meaningful entities. Rather, they believe that that the meaning of an object is entirely imposed on it by the subject examining it. In short, they do not believe there is a universal truth as every person constructs reality differently. Finally, the constructionist view, under which I fall, engages elements of both objectivism and subjectivism (Crotty, 1998). Objects are not understood as inherently 'meaningful entities'; rather, the meaning that is given to them by the subject is an artefact of social construction. Crotty (1998) described the object and subject as partners in the creation of meaning allowing for one object to attain different meanings to different people based on their individual engagement with the world. With this in mind, the existence of universal truth is disputed; but how an individual or group has constructed that which is 'real' can be studied by researchers. My position as a

constructionist is evidenced in this research by my assumption that the actors within the Olympic ambush marketing network have created the ‘object’ that is ambush marketing; and that by studying the views and properties of these networks, I will come to an understanding of what ambush marketing is and what it means in the context of the Olympic Games.

Fundamentally, ontology refers to questions about “what is” (Crotty, 1998, p. 10). Furthering this, it can be described as assertions about the nature and structure of reality, being and/or existence (Crotty, 1998; Fleetwood, 2004; Rawnsley, 1998). In conjunction with epistemology, a researcher’s ontology informs their theoretical perspective and, in turn, the methodology and methods. I identify myself as being from a critical realist ontology that asserts the belief that all knowledge is a product of both history and society; events are ‘real’ but their understanding and interpretation is based on history and the social context of the researcher (Bhaskar, 1989). With this in mind, however, it is important to note that while each individual may experience a different reality, not all claims of understanding may be considered equally valid (Groff, 2004). Critical realists accept the fallibility of human knowledge and recognize the existence of rational grounds to argue for a ‘better’ answer or understanding in regards to human phenomena (Bhaskar, 1989; Judd, 2003). Among other things, my identification as a critical realist qualifies my use of the concept of trustworthiness (Guba, 1981). In my mind, when judging research quality, the word validity suggests something of a black and white final correct truth, while the more modest term ‘trustworthiness’ suggests something that is much more a grey area, not the one and only answer but rather a best and most convincing

interpretation of reality. It is my belief that questions about reality are not black and white on either end of the paradigm spectrum. In the fashion of a critical realist, I believe that, in some cases, there may be one ‘objective’ truth, while in others the truth is much more subjective and open to multiple interpretations. With the above in mind, I use the term of ‘trustworthiness’ as the measure of research soundness based on its origin as an anti-positivist term, but I continue to use the original measures of trustworthiness, that is credibility, transferability, dependability and confirmability, given my place in the paradigm spectrum, which sees me closer to positivism, signifies my belief in the possibility, providing rational grounds for one explanation over another rather than the belief that reality is entirely socially constructed.

Following on from this, a theoretical perspective is “our view of the human world and social life within that world” (Crotty, 1998, p. 7). A clear statement, by researchers, of their individual assumptions on these matters is imperative, as these assumptions will explain and justify the methodology to be used in a given study. There are numerous theoretical perspectives which a researcher may espouse including, but not limited to, positivism, post positivism, interpretivism, critical inquiry, feminism, and postmodernism (Crotty, 1998). Post positivism, where I situate myself, was born out of the rejection of traditional positivists’ views, who believe that there is one ‘real’ truth which a researcher is able to capture through their work and then predict and control (Guba, 1990). Post positivists, on the other hand, are critical of the idea of what Firestone (1990) referred to as “certain knowledge” (p. 111). They believe that, rather than attempting to find and articulate a ‘real’ truth, the elements of our complex social world are best examined using

a theoretical and experience based lens to make inferences about socially constructed interpretations of reality.

Methodology is the next step in examining my theoretical perspective. A study's methodology describes the strategy or plan of action for the research project, governs the choice of methods and links the chosen methods to the conclusions (Crotty, 1998). There are numerous types of methodologies that may be used for a study depending on the researcher's theoretical perspective and the purpose of the study; these methodologies include, but are not limited to: survey research, ethnography, experimental research, grounded theory, heuristic inquiry, action research, discourse analysis, case studies, and phenomenological research. As described in the body of this proposal, both a grounded theory (Charmaz, 2006; Glaser & Strauss, 1967) and case study (Yin, 2013) methodology were used for the dissertation.

In keeping with the case study methodology, I used multiple methods to gather data (Yin, 2013). Denzin and Lincoln (2005) stated that the strategy of using "multiple methods, or triangulation, reflects an attempt to secure an in-depth understanding of the phenomenon in question" (p. 1). Methods refer to the specific practices or activities the researcher will engage to both collect and analyze data (Crotty, 1998). Like methodologies, there are numerous methods for a researcher to choose from based on their specified methodology including: questionnaires, observation, interviews, focus groups, narratives, statistical analysis, cognitive mapping, document analysis, content analysis (Crotty, 1998). For the purposes of this research project, archival analysis (including documents), interviews, and network analysis were used.

Appendix C

Contracting Parties of the Nairobi Treaty

TABLE C-1: Contracting Parties of the Nairobi Treaty

Contracting Parties/Signatories	In Force
Algeria	1984
Argentina	1986
Austria	Signed 1981 – not in force
Azerbaijan	2010
Barbados	1986
Belarus	1991
Benin	Signed 1983 – not in force
Bolivia	1985
Bosnia and Herzegovina	2012
Brazil	1984
Bulgaria	1984
Chile	1983
Columbia	Signed 1983 – not in force
Congo	1983
Côte d'Ivoire	Signed 1981 – not in force
Croatia	2004
Cuba	1984
Cyprus	1985
Czech Republic	Signed 1982 – not in force
Democratic People's Republic of Korea	Signed 1983 – not in force

Egypt	1982
El Salvador	1984
Equatorial Guinea	1982
Estonia	2006
Ethiopia	1982
Ghana	Signed 1981 – not in force
Greece	1983
Guatemala	1983
Hungary	2008
India	1983
Indonesia	Signed 1981 – not in force
Israel	Signed 1981 – not in force
Italy	1985
Jamaica	1984
Kazakhstan	2011
Kenya	1982
Kirgizstan	1984
Madagascar	Signed 1983 – not in force
Mexico	1985
Mongolia	2002
Montenegro	2006
Morocco	1993
New Zealand	Signed 1982 – not in force
Oman	1986
Peru	Signed 1983 – not in force

Poland	1986
Portugal	Signed 1981 – not in force
Qatar	1983
Republic of Moldova	1991
Romania	2005
Russian Federation	1986
San Marino	1986
Senegal	1984
Serbia	2000
Slovakia	Signed 1982 – not in force
Slovenia	1998
Spain	Signed 1981 – not in force
Sri Lanka	1984
Switzerland	Signed 1981 – not in force
Syrian Arab Republic	1984
Tajikistan	1991
Togo	1983
Trinidad and Tobago	Signed 1981 – not in force
Tunisia	1983
Uganda	1983
Ukraine	1998
Uruguay	1984
Zambia	Signed 1982 – not in force

Note: As of April 2013

(WIPO, 2013)