

NETWORKED INSIGHTS ANSWERS YOUR QUESTIONS

PYEONGCHANG 2018

WHAT **IMPACT** DO THE OLYMPICS HAVE ON BRANDS + CULTURE?



PREPARED AND PRESENTED BY

SABINA BHASIN / MITCHELL GRUNIN
MARKETING MANAGER/ CLIENT SOLUTIONS ANALYST

ABOUT NETWORKED INSIGHTS



WHO ARE WE AND WHAT DO WE DO?

We answer tough questions and solve problems for marketers, product teams and executives.

With 12 years of individual-level consumer data, and 30,000 attributes including emotions and sentiment, we work with brands, agencies and product teams to provide audience insights for targeting, activation or content strategy.

Our data and insights help ensure the right content is reaching the right people for the right results.



TABLE OF CONTENTS

IDENTIFY THE TOPIC, NOTE THE TIMEFRAME, AND FLIP TO THE PAGE(S)

TOPIC	TIMEFRAME	PAGE
BRAND ENGAGEMENT BEFORE, DURING AND AFTER	FEB. 8-FEB.26	4, 5, 6
AUDIENCE ENGAGEMENT BEFORE, DURING AND AFTER	FEB. 8- FEB. 26	7, 8
FEMALE ATHLETES + PAY MORE GOLD MEDALS THAN MEN + GREATER ENGAGEMENT	2014-2018	9, 10, 11, 12
UNIQUE SPORTS' INTEREST WHO, WHAT SPORTS AND WHY?	DEC. 28 - FEB. 28	13, 14
NORTH KOREA + OLYMPICS WORLDWIDE PERCEPTION BEFORE, DURING AND AFTER	FEB. 8 - FEB. 26	15, 16, 17, 18



TABLE OF CONTENTS

IDENTIFY THE TOPIC, NOTE THE TIMEFRAME, AND FLIP TO THE PAGE(S)

TOPIC	TIMEFRAME	PAGE
CYBER ATTACK + RUSSIA HOW RUSSIA MADE AN IMPACT ON THE GAMES	FEB.8 - FEB. 29	19
SUMMARY OVERALL INSIGHTS	—	20
GET IN TOUCH HOW TO REACH US	—	21

BRAND ENGAGEMENT

THE BRANDS SPONSORING OR SIPHONING ENGAGEMENT + THE VALUE.



With big games comes big spend and this year was no different.

Brands like Toyota, Intel, and Ralph Lauren are investing in the Olympics to not only support the athletes and their core values, but they also leveraged the use of having a captive, engaged international audience as a way to speak about their brand.

From sponsorship deals to promotions to just having the chance to build brand campaigns using the Olympics audience, most of the six brands Networked Insights analyzed are seeing a positive impact from their efforts. But, two brands are actually facing backlash, suggesting their spend and effort on the world's stage may not be worth it.

When seeking to understand if the spend is worth the bottom line engagement for brands associated with the Olympics,

Networked Insights looked at audience emotions. A positive lift for the brand with increased engagement meant the spend and effort were worth it.

The six brands Networked Insights focused on are as follows:

Toyota, campaign with athletes under #TeamToyota

Intel, who during the opening ceremony conducted a light show with drones, a move that broke a world record.

Ralph Lauren, which made the coats for team USA.

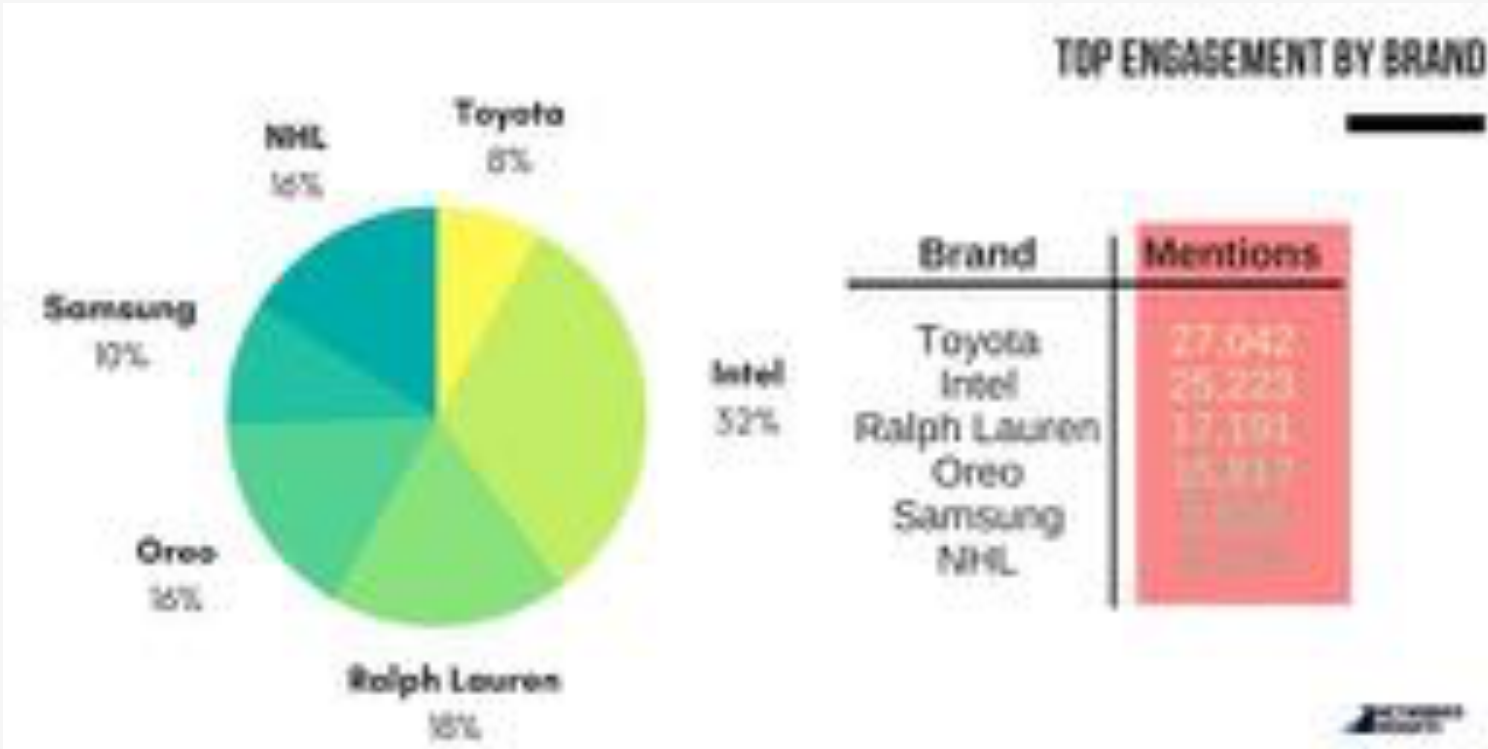
Oreo, which is heavily leveraging social media and even some of the Team USA uniforms.

Samsung, a Korean company made the phones for all the athletes, except Iran because of international sanctions.

NHL, which wouldn't allow their players to participate in the winter Olympics.

BRAND ENGAGEMENT

AUDIENCE ENGAGEMENT ON SOCIAL MEDIA



FROM THE OPENING CEREMONY TO TODAY, INTEL HAS STILL GENERATED THE GREATEST ENGAGEMENT.

This means Intel’s status as a “Worldwide Olympics Partner” and a spend of at least roughly \$100 million per four-year Olympic cycle, according to Reuters, may have been worth it.

For that hefty price tag, sponsors, of which there are 13, receive top billing and a chance to showcase their services to spectators at the games and on television. And that’s exactly what Intel did.

Using their technology, spectators are able to engage in real time with the winter games via virtual reality.

Also, Intel provided a 5G demonstration, drones, artificial intelligence platforms and various gear for use during the games. In-and-Out Burger is successfully capitalizing on the Olympics momentum without having to pay for it.

After two athletes, Adam Rippon and Mirai Nagasu were seen eating at the west-coast burger joint while watching the Sochi Olympics four years ago, their moments in the PyeongChang games is exciting sports reporters.

Finally, the NHL remains a primary conversation topic because the organization refused to let their players attend the games because of potential losses to the league. What this means for the NHL’s long-term brand perception remains to be seen, but it's not looking favorable.

BRAND ENGAGEMENT

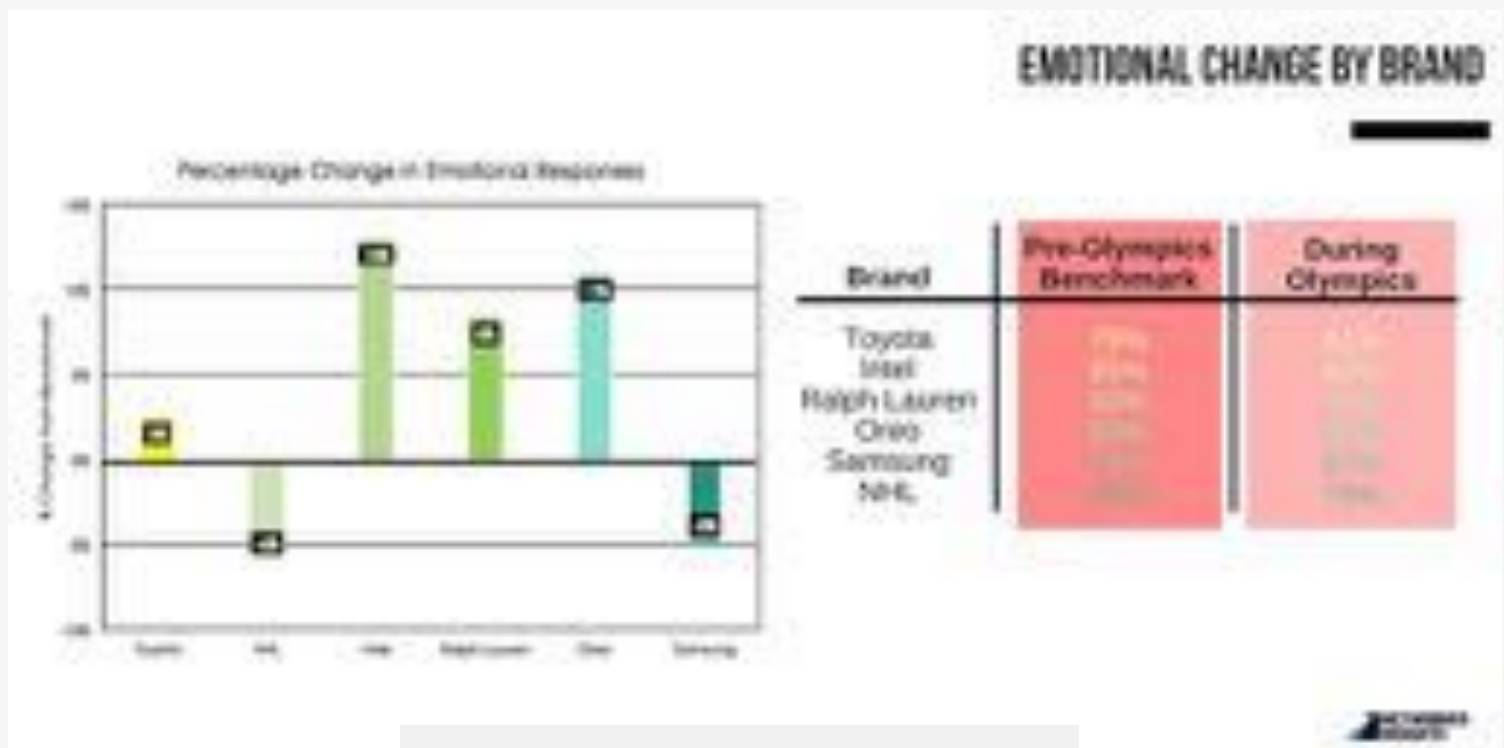
EMOTIONAL CHANGE BY BRAND

Two of the six brands Networked Insights is analyzing are experiencing a drop in positive audience emotion.

Because of the NHL's choice to not allow its players to participate, the organization is seeing a 5.88 percent drop in positive audience sentiment.

Samsung is also experiencing a drop in positive audience sentiment. Before the Olympics, audience sentiment was 83 percent positive and now it is 79 percent positive, a 5 percent drop in positive sentiment.

Networked Insights found the drop in sentiment to be mostly due to the brand's choice to not provide phones to Iran.



Takeaway:

Question: For what brands involved with the Olympics, was the juice worth the squeeze?

Answer: Intel, Ralph Lauren, and Oreo.

AUDIENCE ENGAGEMENT

WHO, WHAT SPORTS, WHY?

Audiences didn't just watch the Olympics, **they engaged with the games.**

From hosting their own viewing parties, to actively commenting on events via social platforms, there was no question. The world was watching.

Networked Insights was able to isolate who was watching, what sports garnered the most attention and what kept them engaged.

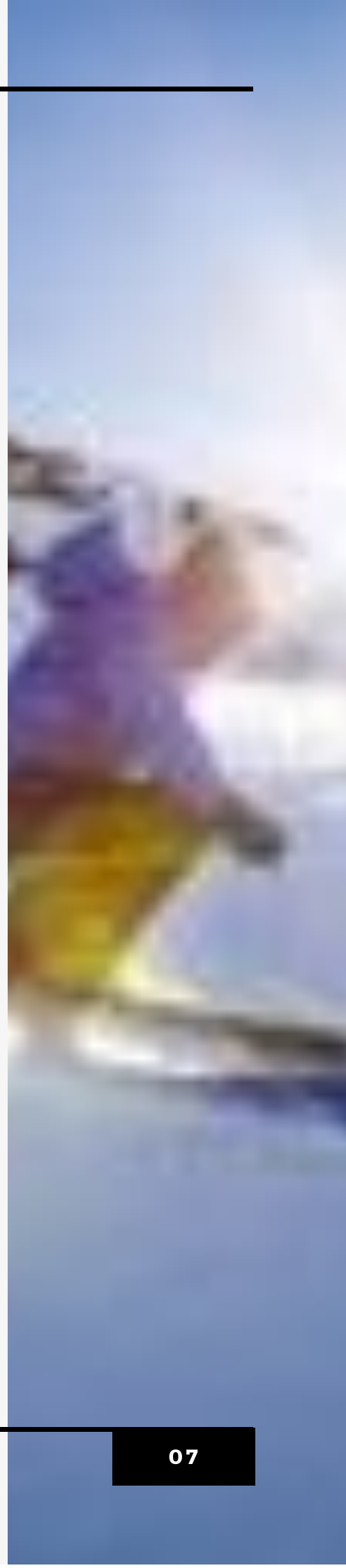
After analyzing the more than 7 million conversations around the Olympics during a one-month time frame (Jan. 16 to Feb. 15), Networked Insights found that men are the most engaged Olympic audience.

The 51 percent male audience also share a nearly 3 times greater affinity for the Olympics than the general consumer with the highest affinity for speed skating at 2.78 times the general consumer.

Additionally, the Olympics audience shares an interest in business and finance, they're generally politically active and could be retirees who are also tech enthusiasts.

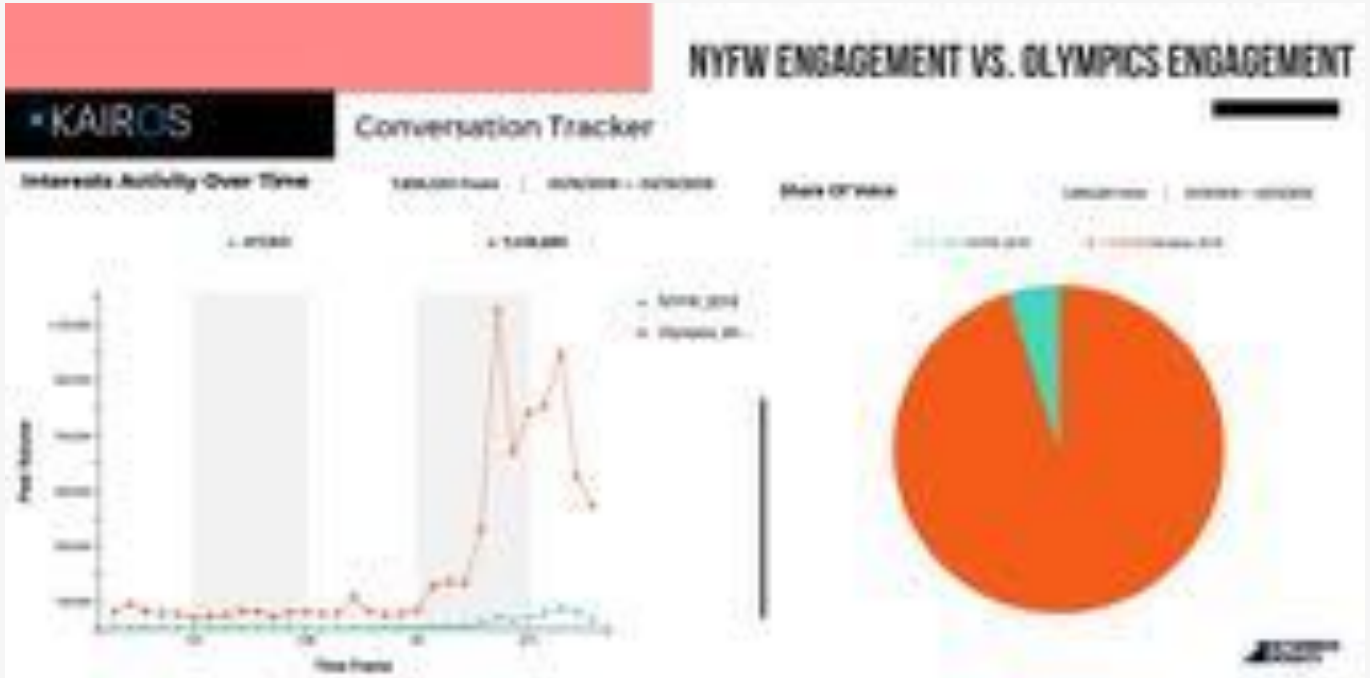
So to reach the Olympics audience, it's best to also include topics and content that also appeals to these groups of audiences.

If we compare that to New York Fashion Week, which was running concurrently with the Olympics, the premier fashion event of the year only claimed 7 percent of the Olympics conversation, and even less when compared to the total conversations around both events during that period.



AUDIENCE ENGAGEMENT

NYFW AUDIENCE COMPARED TO OLYMPICS AUDIENCE



Even with the use of celebrity influencers, the NYFW audience engagement was no match for the Olympics audience. In total, there were 310,000 conversations around NYFW but during the same time frame, there have been more than 4 million conversations around the Olympics.



FEMALE ATHLETES + PAY

GOLD MEDALS + ENGAGEMENT IS UP, SHOULD WOMEN EARN MORE?



MEN MAY DOMINATE THE CONVERSATION, BUT WOMEN HOLD THE GLORY.

Despite earning less per year, and garnering fewer athletic-focused sponsorships, female athletes dominated in Olympics' audience engagement and in gold medals – both domestically and internationally.

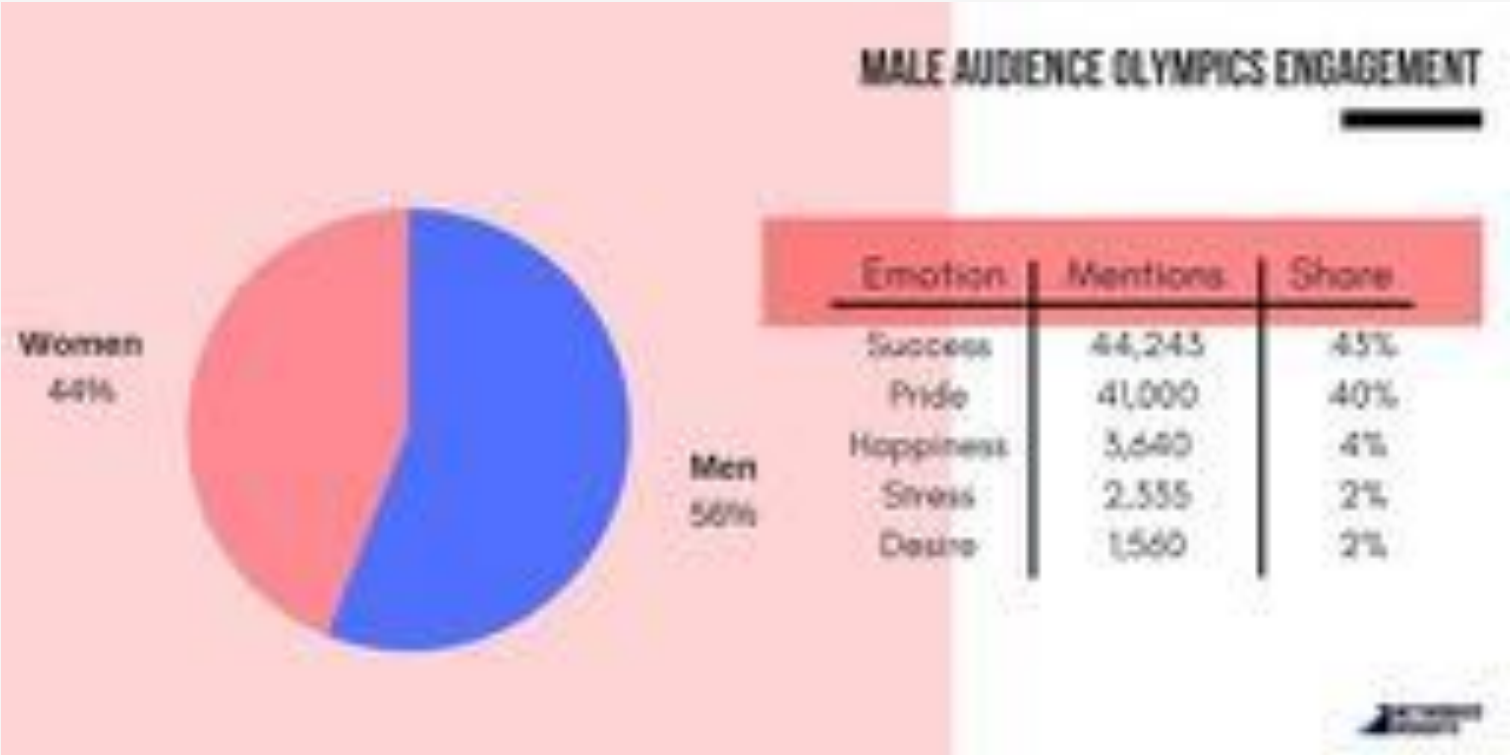
So, Networked Insights wanted to find out, should female athletes be earning more than they are, simply based on the increased audience interest and success they're experiencing?

To answer this, Networked Insights quantified the emotions, sentiments, and volume of engagement for both male audiences and female audiences during the Olympics and benchmarked against the total conversation.

The findings were clear and finite: women ruled and it could mean better sponsorship opportunities for brands.

FEMALE ATHLETES + PAY

THE FINDINGS



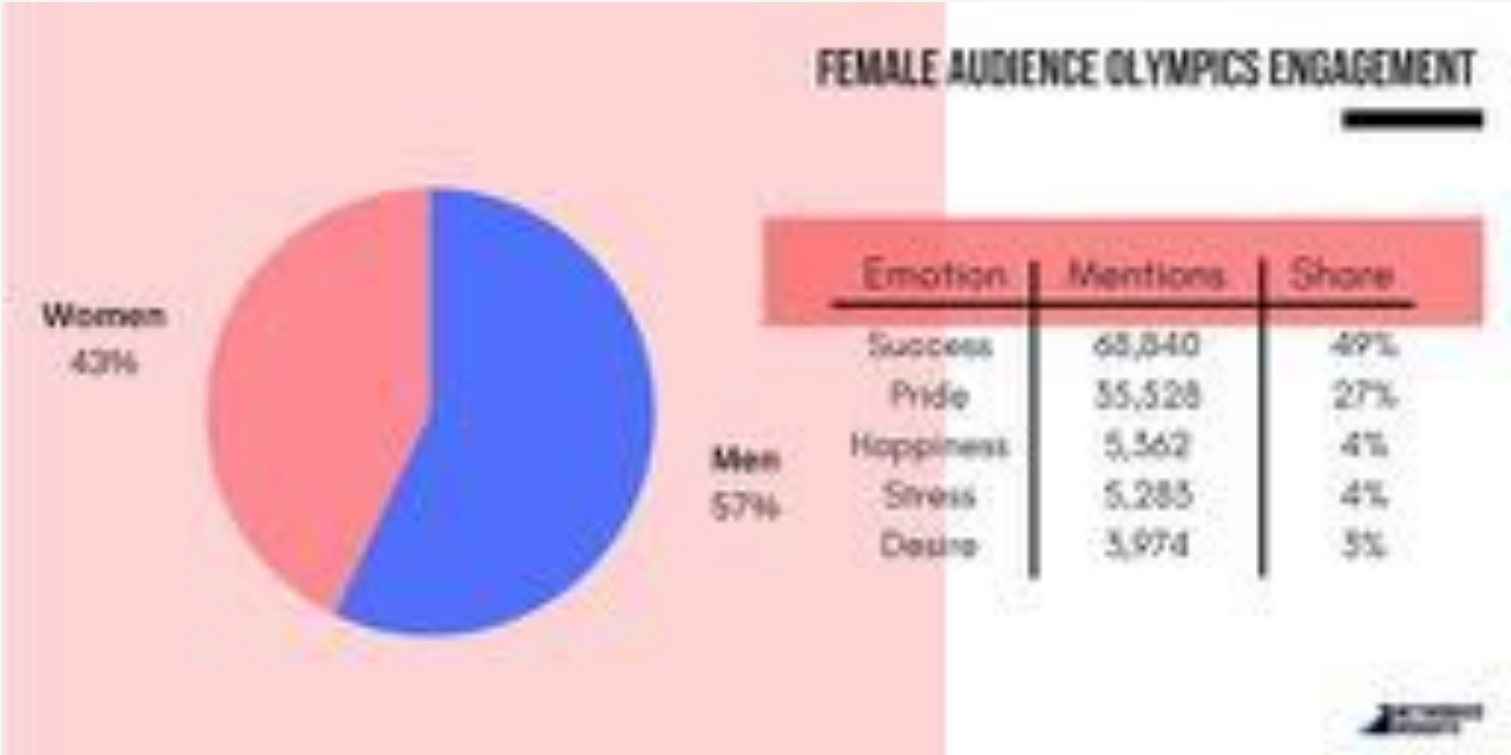
Men and women talked about women’s events more than they talked about men’s events, and the margins were significant.

The conversation was mostly positive. Networked Insights found that of the total conversations, 43 percent related to success and 40 percent were bursting with pride for the athletes and for the country.

NEARLY 60 PERCENT OF THE CONVERSATION DURING WOMEN’S EVENTS WAS HELD BY MEN.

FEMALE ATHLETES + PAY

THE FINDINGS



Women, too.

As women got their turn to compete in the various Olympic events, more than half of the engaged audience was male and conversations were mostly positive, too, also focusing on the success and pride of the win and the value to the country.

The most exciting gold medal earned by women was in hockey. The nail-biting shootout in the U.S. versus Canada game uprooted a four-time winning streak and broke a 20-year record. The last time the U.S. beat Canada in women's hockey was in 1998, the first year the event was introduced to the winter games.

WOMEN HAVE WON 12 OF THE 23 U.S. MEDALS, AND FIVE OF THE NINE U.S. GOLD MEDALS.

FEMALE ATHLETES + PAY

SHOULD AUDIENCE ENGAGEMENT TRANSLATE TO SALARY?

The hockey win is especially thrilling for women because it comes after a hard fought fight for female financial fairness. Just one year ago, women claimed that USA Hockey wasn't paying them a living wage. Some also said they had to work multiple jobs in addition to training and competing, despite being on a nationally recognized team.

After asking for a \$68,000 salary and the same treatment men receive like being able to bring a guest to competitions, flying business class and have disability insurance. Women boycotted, the league threatened to bring in replacement players and the feud continued to become uglier before ultimately relenting in favor of the athletes. The final agreement was never publicly disclosed.



Most concerning the feud is just how far the ugliness spread. The women's arguments drew support from other major player associations like the NFL, NBA, MLB, and NHL. It was also at the same time the national women's soccer team was fighting for their own financial equality.

The battle for financial fairness isn't limited to hockey or soccer.

Women earn 77 percent of what men earn and it's even more pronounced in other sports. Adelphi University found in 2014 that athletes in the WNBA earn 1.6 percent of a male athlete in the NBA. In golf, women earn 16.6 percent of what men earn and in tennis, women earn 54 percent of what men earn.

Bottom line, it was a fight that women won for the longevity of major associations. And now with engagement up, trampling men, should an increased salary be implemented across the board?

Conclusion

If more than half of the Olympics audience, which is male-dominated, is engaging with women's events more than men's sports, it raises an opportunity for brands to **better align themselves with female Olympic athletes.**

UNIQUE SPORTS' INTERESTS

WHO, WHAT SPORTS AND WHY?



THE OLYMPICS ARE ABOUT MORE THAN ATHLETIC TALENT.

They're about exposure to new cultures, new athletes and new sports, too.

Networked Insights set out to determine which sports that are unique to the Olympics are garnering more attention than standard winter sports, and if that presents an opportunity for brands to connect with this audience.

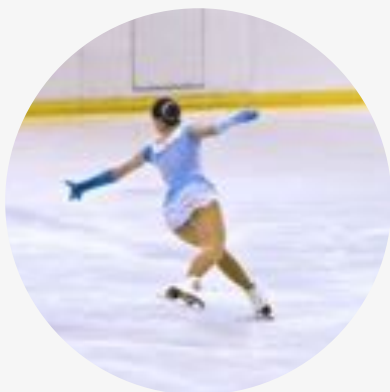
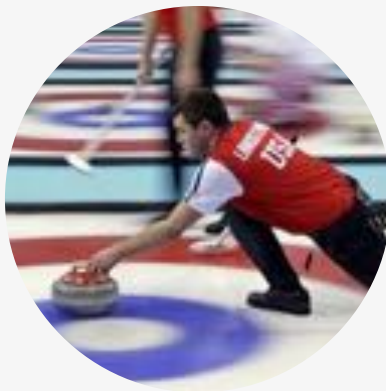
To answer this, Networked Insights pulled up a two-month time frame and noted the events, the sport and the athletes gaining attention and causing an emotion like curiosity, interest, love or excitement. Networked Insights also analyzed conversation content to ensure it specifically correlated with the event.

What Networked Insights found is that the Olympics stick to their core values and affect positive connection in areas that aren't typically known, too.



UNIQUE SPORTS' INTERESTS

WHO, WHAT SPORTS AND WHY?

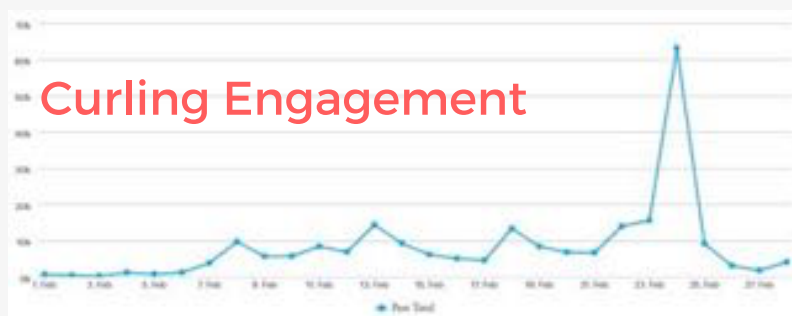


Biathlon:

There was only minimal activity until the Olympics and then once the games began, there was a huge surge interest and once the games ended, the engagement went back to normal.

Curling

Leading up to the winter games, the interest in sport began to grow, but it was nothing like the spike during the games. Networked Insights found that before the Olympics, there were on average 8K conversations. Though minimal, it's still more than luge, skeleton and Biathlon. But in one day, during the games, it blows out all other events.



WORLDWIDE PERCEPTION BEFORE, DURING, AND AFTER

It's a dramatic shift that audiences believe to be owed almost entirely to the Supreme Leader Kim Jong Un's actions during the first few days of the PyeongChang Games. Instead of nuclear war, conversations focused on the efforts toward reconciliation.



NORTH KOREA + OLYMPICS 2018

Methodology + Results

Using Kairos, Networked Insights' audience intelligence platform, we analyzed more than 9 million conversations around North Korea that occurred during the last three months. Of those conversations, almost 60 percent of the audience felt negative about the country, with stressful topics, like nuclear war and nuclear threats being discussed in 17 percent of conversations.

AUDIENCE EMOTIONS ABOUT NORTH KOREA + OLYMPICS: 11/13-2/13



But when Networked Insights isolated the conversations to opening day to February 13, Kairos pulled up more than 1.5 million conversations, and nearly 60 percent of the audience felt positive about North Korea and the Olympics. And instead of stress, 17 percent of the conversations mentioned keywords relating to pride.

AUDIENCE EMOTIONS ABOUT NORTH KOREA + OLYMPICS: 2/6-2/13



NORTH KOREA + OLYMPICS 2018

This incredible shift in conversation, Networked Insights found, is mostly because of the DPRK's recent actions.

When former Supreme Leader Kim Jong Il's only sister, Kim Yo Jong, arrived at the PyeongChang Games straight from Pyongyang and proudly stood behind U.S. Vice President Mike Pence, audiences understood the act to be a sign that warmer relations are on the horizon, at least from the DPRK.

Without speaking, Kim Yo Jong momentarily arrested the power of an athletic gold-medal win. With only a flash of a smile, she completely shifted entrenched opinions of a country riddled with innumerable human rights violations. With only a brief visit to her rival city, standing behind her U.S. adversary, she conveyed the only message DPRK wanted to be heard: we come in peace; you don't.

As messages of reconciliation and peace dominated the opening weekend's visit, Pence remained seated during the opening ceremonies, and audiences spoke out.



The move aligned with Pence's no-nonsense approach toward the DPRK, but the choice interfered with the US-backed South Korea's ultimate desire for reunification and improving inter-Korean relations. Pence also didn't attend a pre-opening ceremony dinner, where both Moon and Kim were in attendance—further driving the point that the U.S. is not backing down, to the chagrin of South Koreans.

Audiences caught-on to the should-be Olympic sport of political charades and most didn't support, however, there were plenty (more than 40 percent) who were vocal about the "obvious attempts at propaganda."

One Tweeter wrote, "The media praising North Korea and their Olympic appearance is sickening. You're essentially saying you support Kim Jong-Un (sic) and his regime."

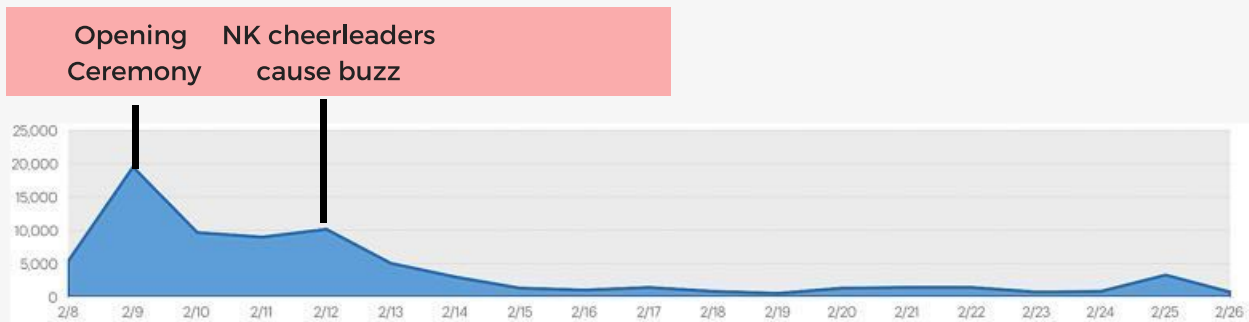
Another, like Jake Tapper, took the moment to re-educate the supportive public about the crimes against humanity.

Even so, just as the North Korean cheerleaders ignited shock and awe as they rallied with bright smiles throughout the first-ever joint North and South Korean women's hockey team, Kim Jong Un's choices were a win for attention.

NORTH KOREA + OLYMPICS 2018

SUMMARY

NORTH KOREA TREND LINE SUMMARY

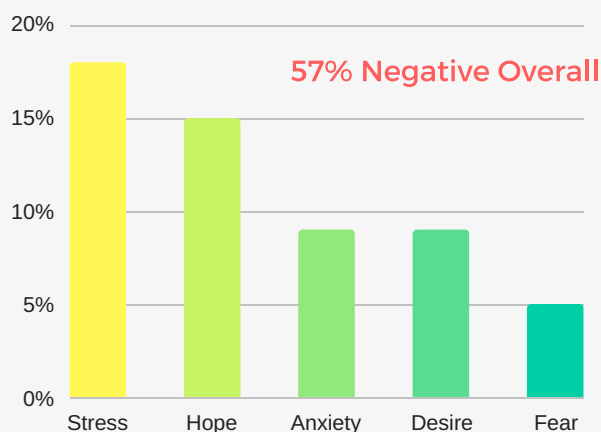


Despite the initial swing in favor of the DPRK, the engagement quickly faded, though perceptions remained positive as discussions of thawing tensions continued.

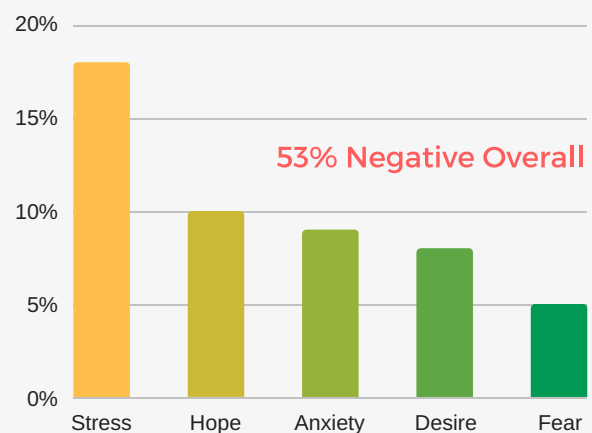
After the cheer squad rallied during some events and the lack of medal wins, their presence became mostly symbolic and didn't affect conversational trends much.

Also, the initial spike could be attributed to the conversations around the Donald Trump and Kim Jong Un impersonators.

Before Olympics



During Olympics



CYBER ATTACK + RUSSIA

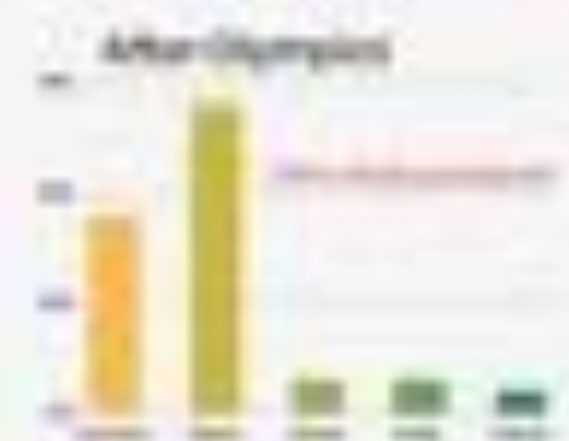
How did the Russian government and its allies use cyberattacks to influence the 2016 US Presidential election?

How did the Russian government and its allies use cyberattacks to influence the 2016 US Presidential election?



How did the Russian government and its allies use cyberattacks to influence the 2016 US Presidential election?

How did the Russian government and its allies use cyberattacks to influence the 2016 US Presidential election?



SUMMARY

How will the company manage its declining resources?

Revenue from the company's
operations is declining

Revenue
from
operations
is declining

Revenue

Revenue
from
operations
is declining

Revenue from the company's
operations is declining

Revenue from the company's

Revenue from the company's
operations is declining

Revenue from the company's
operations is declining

Top 5 Revenue



NETWORKED INSIGHTS

ANALYTICS AND CONSULTING



**THE NETWORKED
INSIGHTS**

ANALYTICS AND CONSULTING

ANALYTICS AND CONSULTING

ANALYTICS AND CONSULTING

ANALYTICS AND CONSULTING

ANALYTICS AND CONSULTING

ANALYTICS AND CONSULTING

ANALYTICS AND CONSULTING

ANALYTICS AND CONSULTING

ANALYTICS AND CONSULTING

ANALYTICS AND CONSULTING

ANALYTICS AND CONSULTING

ANALYTICS AND CONSULTING