

Post Games – What got China engaged?

Some surprising brands, stars and sports made significant local impact

- **Official sponsors move ahead of most ambush players**
- **Li Ning awareness up 127%, lighting people's emotions**
- **Guo JingJing number one with women, Phelps and Bolt make local impact**

BEIJING – October 2008 – Marketing Consultancy R3 and their partner CSM Media Research, have recently announced the results of their first post Olympics research into China's consumers and their Olympic preferences. "Through aggressive marketing, several companies gained significant leverage from the last two years" said Greg Paull, Principal of R3. "With the right blend of traditional, digital and activation, they've laid a platform for their future in this country" he added.

R3 and CSM's Olympic research is uniquely face to face, interviewing over 1,500 Chinese consumers in the ten most important cities. "We've now sat down with over 16,000 different people every three months basis to track changes in their views – and to link that with media viewership and expenditure data to close the loop" said Matt Brosenne, International Client Service Director at CSM Media Research in Beijing.

Olympic satisfaction rated at record high 8.88 out of 10

There was a high local satisfaction across all of China's cities with greater details on some specific areas "Chinese consumers responded most strongly to Gymnastics (25%), Table Tennis (25%) and Diving (15%)" said Mr Paull. "This was one of the drivers of Li Ning's success in this wave with their sponsorship of two of these teams, helping them to a prompted awareness of 71%, second only to Coca-Cola" he added

New Stars Emerge – from home and away

While Yao Ming and Liu Xiang still continue to lead popularity, a new group of players have come forward for potential leverage – "Chinese heroes such as Zhang Yi Nin, Wang Nan and Yang Wei all won gold and increased 420% in mentions in our study" said Mr Brosenne. "At the same time, international heroes such as Phelps, Kobe and Bolt increased 360%, proving that China is recognizing and supporting the world's best" he added.

A new leader – from the diving pool

While Liu Xiang still has a loyal fan base (48% singled him out this wave) he still lost 16% of his popularity this wave, and diva diver Guo JingJing became the most popular athlete ranked by women on China, as well as leading the poll with 25% in terms of the most 'satisfying athlete' from the games.

Coca-Cola – A case study for the ages

Despite a record number of competitors and ambush players, no brand was more consistent and dominant in the end than Coke. "Coca-Cola leveraged all of its assets, experience and stars in the most compelling way with the greatest consistency – and have reaped not only returns in our study, but in the marketplace with increased preference and volume" said Mr Paull. "Over 50% of respondents mentioned the brand spontaneously, and each person recalled an average of 2.3 Coke promotions, more than the second and third ranked companies combined" he added. The three stars of Coke's "Dream Team", Yao Ming, Liu Xiang and Guo JingJing were also strongly associated with the beverage brand.

Sports Brands Get Strongest Games Benefit

Amongst Li Ning's success, adidas and Nike were two of the top five brands to move up this wave. "All three brands did an excellent job of leveraging the turf they created" said Mr Brosenne. "adidas increased by 56%, with some exceptional activations and branding on 1.2 million volunteers and China medal winners – and Nike increased 41% despite stiff competition from the usual suspects as well as Puma and Usain Bolt" he added

What's Next – Engagement Matters

The Olympics has dramatically changed the marketing landscape in China for the better according to R3 and CSM.

China's consumers are now looking for brands they love, not just brands they know.

"You have to first remember, the marketing industry is just twenty years old in China – countries like India have a sixty year head start in terms of development" said Mr Paull. "That said, there's been more developments in the last few years that the previous decade – standards towards sports and athlete exploitation, onground activation and increasing consumer sophistication have generated much more professional and more targeted thinking" he added.

"Our research also shows massive changes in consumer behavior in two years"

said Mr Brosenne. “Internet daily usage has moved from 1.4 hours to 2.0 hours a day, not to mention the huge increases in the total online population. 40% of respondents accessed IPTV and Mobile TV as vehicles for Olympic updates – so marketers need to migrate their thinking to serve this digital community” he added

WAVE 10 TOP FIVE SPONSORS

1. Coca-Cola
2. Yili
3. Lenovo
4. Li Ning
5. adidas

WAVE 10 CSM-R3 TOP TEN LOCAL COMPANIES

1. Yili
2. Lenovo
3. Li Ning
4. China Mobile
5. Mengniu
6. Bank of China
7. Arawana
8. Haier
9. Yanjing
10. Tsingdao

Methodology

Unlike other research, CSM and R3 employ a face-to-face approach interviewing 1,500 consumers in ten Chinese cities every three months – allowing for more indepth discussions and the testing of visual stimulus. Fieldwork is conducted for one month every three months, with increased frequency around the games

About R3

R3 is an independent marketing consultancy whose aim is to improve the efficiency and effectiveness of Asian marketers and their agencies. Founded in 2002, it works with more than ten of the Olympic sponsors on analyzing and improving their sponsorship return on investment. For more information , visit www.rthree.com or write to emma@rthree.com - +8610 6552 5269

About CSM Media Research

Part of a global group, CSM Media Research manages China's largest ongoing media research in China, reaching 224 cities and 54,000 homes on an ongoing basis. Founded in 1997, it is a joint venture between TNS, the world's largest custom market research company and CTR, China's leading market research company

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