



## First Wave of R3/TNS Sport Research draws global exposure

### 胜三/TNS 体育调查第一波获得全球披露

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## Beijing Olympics Present Hurdles for Marketers

Costs, Competition, May Prove Vexing; Three Official Beers

By GEOFFREY A. FOWLER and WENDY LEE

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In Chinese ads, viewers can see Olympic hurdler Liu Xiang racing with kangaroos to pitch Visa cards to the nation's yuppies, who like their Australian vacations.

They can also see Mr. Liu with a can of Coke. And drinking Yili milk, and wearing Nike shoes, and hawking China Mobile cellphone services. For Beijing Olympics advertisers, it may be hard to be heard above all the noise.

Olympians usually win contracts to pitch just one or two products after they bring home the gold. That 23-year-old Mr. Liu already has marketing deals with Visa International, [Coca-Cola](#) Co., Yili Group and [Nike](#) Inc., plus several others, reflects both the allure and the challenge of advertising with China's 2008 Olympics.

The Beijing Games are catnip to marketers. By now it has become a truism that China's economy is red-hot and boasts 1.3 billion consumers. [Johnson & Johnson](#), never an Olympic sponsor before, has climbed on board as a partner in the 2008 Games. Sir Martin Sorrell, chief executive of marketing heavyweight [WPP Group](#) PLC, reckons that by the time the Games come along, China could be the world's second-largest advertising market. Sir Martin has said it is "difficult to think of any sporting or cultural event in the world that could be bigger."

But in some ways, it may be too big. Thirty-six companies have by now snapped up marketing rights to the 2008 Games, and the Beijing Organizing Committee, or Bocog, is still at it, choosing a final round of suppliers. Already, travelers on Beijing's ring roads see the 2008 logo splashed across billboards for dozens of different companies. Computer maker [Lenovo Group](#) Ltd. sells special-edition USB memory sticks featuring the Games' five cute mascots at a premium price. To launch its new Sagitar model, Volkswagen China Group, which coordinates the activities of [Volkswagen](#) AG and its two joint ventures in China, made a splash over several months by giving away a new Sagitar to every Chinese gold medalist at the Torino games this past winter in Italy.

"If anybody starts now, it's a bit too late," says Sheng Li, Visa's head of marketing in China, who began his Beijing Olympics campaigns in 2004.

It hasn't been cheap, either. Beijing-specific endorsements in some categories have, atypically, cost advertisers as much as they would usually pay to be international sponsors of more than one Olympics.

In the hotly contested car category, Volkswagen China Group eventually put in the winning bid of about \$100 million in cash and kind, according to people familiar with the matter. The group's director of Olympic marketing, Anthony Laver, estimates that in the 12 months before the Games, official sponsors will spend up to \$2 billion on advertising.

With the Beijing Olympics acting as China's coming-out party, Chinese companies were under pressure to bid, keeping prices high for the already-coveted event, people familiar with the matter say. Eight of the 11 Beijing Olympic partners are Chinese companies, including utility and energy companies such as State Grid Corp., [China Petrochemical Corp.](#), or Sinopec, and China National Petroleum Corp. In addition to the sheer number of messages jostling one another in consumers' minds, advertisers face a raft of problems unique to China, where sports marketing is still a nascent industry.

The Olympics traditionally are home to one official brand of credit card, one computer, one wristwatch. But the 2008 Games are already home to three official beers: Tsingtao, Yanjing and Budweiser. The decision was rare, and required special permission from the International Olympic Committee.

"One beer cannot cover all China," says Liu Jun, Bocog's deputy director of marketing. Each of the beer companies established a different target audience, Mr. Liu says.

"Our point of view is this is the first time that China will conduct the Olympics," says a Tsingtao Brewery Co. representative. "We believe it is a great thing that many Chinese brands and businesses are able to participate."



Clockwise from top left, Olympic hurdler Liu Xiang with kangaroos in Australia in a Visa ad; before the Athens Olympics, he was picked by Coca-Cola China for the Beijing leg of the International Olympic Torch Relay; and in an ad for Yili milk.

In China, sports marketers can find the rug pulled out from under them. For example, the nation's "diving prince," Tian Liang, who won a gold and a bronze medal in Athens in 2004, was kicked off the Chinese national team after he did too many commercials.

Then there is the case of the omnipresent hurdler/hawker, Liu Xiang. When Mr. Liu recently broke the world record in a competition in Lausanne, Switzerland, Nike – which isn't an official sponsor of the Games – made him a T-shirt featuring his 12.88-second time to wear as he stepped off the plane back home. Nike says it was one of the fastest campaigns it ever produced. Yet one of Mr. Liu's other sponsors, dairy brand Yili, soon launched its own campaigns touting the 12.88 figure.

Chinese consumers find all this confusing. A survey to be released Tuesday by **Chinese marketing consultancy R3 and research firm TNS Sport, a division of CSM Media Research**, found that, without prompting, Chinese consumers associated Mr. Liu with no fewer than 19 brands.

"Few companies are succeeding right now in building unique associations," says R3's principal, Greg Paull. There is "tremendous potential for star associations to be 'overcooked,'" he says.

Visa is dealing with Mr. Liu's overexposure partly by featuring him in unconventional settings, like with the Australian marsupials. In addition, since 2004, Visa has sponsored the low-key national women's field-hockey team. The company's marketing manager, Mr. Li, says ads featuring the team underscore Visa's commitment to sporting, not just celebrities.

In China, it is coaches, not professional agents, who usually manage the careers of athletes. So Volkswagen provides its own media training to all the athletes it works with. "We let them understand what role they play and how that links to our connections with the Games," Volkswagen's Mr. Laver says.

Bocog has established a sort of sponsors' club, offering conferences at which companies gather to discuss shared problems and coordinate marketing activities when they can.

International brands seem to be off to a slower start than their local rivals, though marketing experts disagree on exactly when and how brands should use their Olympic association. Eight of the top 10 brands that Chinese consumers associate with the Olympics are local, according to the R3 and TNS survey, even though only one of 11 world-wide IOC Olympic partners is Chinese.

Many of the Games' international sponsors, such as [McDonald's Corp.](#), have relied on their long-term associations with the Games to build goodwill. But Chinese media have been closed to foreign content for so long that few consumers in China get the connection. In the survey, McDonald's ranked 27th among brands that Chinese people associate with the Olympic rings. The fast-food giant came in right after Chinese textile maker Heng Yuan Xiang.

Donald Chan, the China national managing director of [Publicis Groupe SA's Leo Burnett](#) ad agency, is advising some of his clients, which include McDonald's, to start planning – but wait on delivering ads until the second half of 2007. "Local brands are now trying to build a competitive presence against multinationals," he says. "But in terms of Olympic experiences, there is nothing going on right now. A lot of multinationals were using the World Cup to stay engaged instead."

The multinationals and Chinese brands may be on different schedules because they are looking for very different results from their expensive marketing rights. "The message for the multinationals is that, 'We are here in China, and we are going to be part of this transformation that is taking place,'" says Scott Kronick, president of WPP Group's Ogilvy public-relations agency in Beijing. "The message for local companies is that, 'We are a famous Chinese company that has the potential to be a global brand.'"

Yili, whose corporate goal is to become a global brand by 2010, has been one of the most aggressive Olympics advertisers since it announced its sponsorship of the Games in November 2005. "Sports resources are limited, and whoever strikes first prevails," says Yili's brand director, who declined to be named. The company tried to sign up athletes before Yili had won the official sponsorship.

And China's record with intellectual-property rights has left some brands nervous about "ambush marketing," or *fu ji shi ying xian*, in which brands either steal the Olympics logo or find ways to work Olympic images into their ads. "It's a very tough job for Bocog. We must protect rights at the same time, so many companies in China want to be associated with us," says Bocog's Mr. Liu.

The group has already shut down some unauthorized use of its logo and is considering launching educational campaigns on state TV to inform the public about the phenomenon. The campaigns may even feature hurdler Liu Xiang.



## 北京奥运成为市场主的跨栏比赛

巨额花费，复杂竞争使人苦恼；三家啤酒赞助商

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在广告中，观众们可以看到奥运跨栏选手刘翔和袋鼠赛跑，把信用卡抛向享受着澳大利亚假期的中国游客。他们还能看到刘翔举着可口可乐，喝伊利牛奶，穿耐克鞋，使用中国移动的手机服务的场景。

对于北京奥运的广告主来说，要在这众多的干扰中让自己的声音给人留下印象，恐怕不是件容易的事。

奥运会运动员在夺金之后一般只会同一到两家公司签约，代言其产品。但是23岁的刘翔已经与Vasia国际，可口可乐公司，伊利集团，耐克公司再加上其他数家公司建立了合作关系。由此可见，中国2008奥运会当中吸引力和挑战性并存。

北京奥运对于市场主来说是一剂兴奋剂。可见的事实是，中国的经济飞速发展，并且拥有13亿人口的巨大消费市场。强生公司从未赞助过以往任何一届奥运会，但是对于2008年北京奥运，他们也成为了众多合作伙伴中的一员。广告业界重量级的WPP集团的首席市场执行官Martin Sorrell认为，当比赛到来的时候，中国将成为世界第二大广告市场。Martin先生说：“很难想象世界上还有比奥运更大型的体育或文化盛事。”

但是在某种程度上来说，或许这比赛有些过大了。到目前为止已经有36家公司获得2008奥运的营销特权，北京奥运会组委会(BOCOG)仍在对最后一批供应商进行筛选。在北京环路上穿行的人们已经可以看到带有2008北京奥运标志的十数家不同公司的宣传牌。电脑制造商联想集团以高价出售印有5个可爱的奥运吉祥物的特别版USB记忆棒。为了其最新的速腾轿车的发布，中国大众汽车集团与德国大众汽车公司及其在中国的两家合资公司一起，在几个月以前，向在意大利都灵冬奥会夺金的中国运动员每人赠送一辆全新的速腾轿车。

参与这项活动，价钱不便宜。北京奥运中某些领域的赞助费，比通常成为一个奥运会国际赞助商的价钱更高。在激烈竞争的汽车领域，据知情人士透露，大众中国集团最终以大约1亿美金的现金以及一些附加物中标。

大众集团的奥运市场总监Anthony Laver认为，在奥运开始前的12个月，众赞助商在广告上的花费预计将达到20亿美金。

北京奥运成为中国的初入国际市场的一次盛会，知情人士说，中国公司对比赛充满热情，纷纷参与竞标，使这个已经让人垂涎的盛会继续保持高价。北京奥运的11个合作伙伴中的8个是中国本土公司，包括大型能源公司如国家电网公司，中石化，中石油等。

由于信息太多，各种广告已经开始在消费者脑海中互相冲撞，除此以外，广告主还面对一些中国特有的问题。在中国体育营销还是一个新生事物。



左上：奥运跨栏选手刘翔与袋鼠在澳大利亚的 Visa 广告；右下：雅典奥运之前，刘翔被可口可乐中国选为国际奥运竭力北京站接力选手；左下：伊利牛奶广告中的刘翔。

传统上奥运会的官方赞助商中包括一个信用卡品牌、一个电脑品牌和一个腕表品牌。但 2008 奥运会的官方赞助商中已经有 3 个啤酒品牌了：青岛，燕京和百威。这样的决策比较少见，而且需要得到国际奥委会的特别批准。

“一种啤酒不可能覆盖整个中国，”北京奥组委的营销副总监刘军这样说。刘军认为每个啤酒公司都建立了其独特的目标客户群。

青岛啤酒的负责人说：“我们认为这是中国第一次运作奥运会。我们相信能够参与其中对许多中国品牌和公司来说都是一次绝佳的机会。”

在中国，借体育营销的市场主也有失策的时候。比如说，中国的跳水王子“田亮”，曾在 2004 年雅典奥运会上赢得一金一铜，因为做了太多商业广告而被中国国家队开除。

还有无处不在的刘翔，既是跨栏运动员又是个推销小贩。当刘翔最近在瑞士洛桑的比赛上打破世界记录后，耐克 – 并非该赛事的官方赞助商 – 特别给他定做了一件显著标明 12.88 秒新成绩的 T 恤，刘翔走出归国的飞机时就穿着这件 T 恤。耐克自己也说这是他们动作最为迅速的一次活动。刘翔的另一个赞助商，乳品品牌伊利，也即将启动以数字 12.88 为招牌的活动。

中国的消费者对这一切感到十分困惑。根据一项即将在星期二发布的调查（由中国营销顾问胜三公司以及 TNS 体育（中国）/CSM 媒介研究体育与媒介研究部共同进行）显示，在没有提示的情况下，中国的消费者将刘翔与多于 19 个品牌联系在一起。

“很少有公司现在能够成功建立独特的联系。”胜三公司总裁 Greg Paull 先生这样说，“建立品牌与明星的联系还有很大潜力有待挖掘。”

Visa 正在某种程度上通过反常规的环境背景等来应付刘翔曝光率过高的问题，比如让他和澳大利亚袋鼠赛跑。而且，Visa 自从 2004 年以来一直赞助低调的国家女子曲棍球队。公司的营销经理李先生说赞助球队其实意在突出 Visa 支持体育，并非仅仅关注名人。

在中国，通常是教练而并非专业的经纪公司来运作运动员的职业生涯。所以大众汽车为所有一起工作的运动员提供它自己的媒介训练。“我们让他们更好地理解自己的角色以及如何与我们、与赛事相联系，”大众的 Laver 先生这样说。

奥组委已经建立了一个赞助商俱乐部，组织会议让赞助公司坐在一起讨论共同遇到的问题，并且在可能的时候协作进行营销。

国际品牌似乎比他们本土的竞争对手起步慢半拍，尽管营销专家对品牌在何时、如何运用与奥运会的关联持不同意见。根据胜三和 TNS 的调查，一提到奥运会中国的消费者首先想到的 10 个品牌里 8 个都是中国本土品牌，尽管在 11 个国际奥委会的合作伙伴里只有 1 个是中国的。

奥运会的众多国际赞助商，如麦当劳公司等，依靠他们与奥运之间的长期关联来建立亲切感。但是中国的媒体对国外的信息已经封闭了很久，因此在中国，很少有消费者能够感受到这种关联。调查显示，中国人认为在与奥运五环相关性一项中，麦当劳在所有的品牌里排名第 27。这个快餐业巨头，排名在中国纺织制品制造商恒源祥之后。

阳狮集团中国区经营总监 Donald Chan

新加坡李奥贝纳广告公司建议其包括麦当劳在内的一些客户开始进行计划—但是要到 2007 年的下半年再开始发布广告。“本土品牌现在正在试图建立与跨国公司之间的竞争优势。”他说，“但是从奥运经验的角度来看，没有发生什么。许多跨国公司反而是在依靠世界杯来保持其市场参与性。”

跨国公司和中国品牌可能会依照不同的时间表，因为他们要从这一昂贵的营销特权中寻求的结果不同。WPP 集团北京奥美公关公司总裁 Scott Kronick 说：“跨国公司要传递的信息是：‘我们现在在中国，我们将要成为正在发生的转型中的一部分。’而‘对于本土公司的信息则是：‘我们是一家著名的中国公司，我们有潜力成为全球品牌。’”伊利集团的目标是到 2010 年成为全球品牌，自 2005 年 11 月宣布成为赞助商以来，他们的表现使他们成为最有闯劲的奥运广告主之一。“体育资源很有限，先到者先得。”一位不愿透露姓名的伊利品牌主任说。伊利公司在获得奥运赞助权之前曾经试图与运动员签约。

中国的知识产权纪录让一些品牌对于“伏击式营销”感到紧张，这些“伏击者”或者盗用奥运标志，或者另寻他路来将奥运形象加入其广告之中。奥组委刘先生说：“对于奥组委来说是很艰巨的任务。我们同时必须对于权利进行保护，诸多的中国公司都希望与我们相关联。”

奥组委已经制止了对奥运标志的一些未授权的使用，并且在考虑在全国电视台播放宣传片来教育大众抵制这种现象。宣传片的主角可能会是刘翔。