

YILI, COCA-COLA, adidas LEADING THE RACE TO BEIJING

伊利、可口可乐、阿迪达斯引领北京奥运长跑

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BEIJING, January 2007 - The release this week of R3's second wave of the proprietary "OP" or Olympic Performance" Index, shows improvement in marketing efforts from nine of the top ten sponsors, with dairy giant Yili now a surprise leader.

北京 2007 年 1 月 - 本周公布的胜三 OP 指数或称奥运表现指数 (专利) 第二轮

结果显示, 得分位居前十的赞助商中有九位的市场营销表现取得明显进步, 乳业

巨头伊利公司出人意料的成为当前奥运赞助的领跑者。

OP INDEX WAVE 2

	WAVE 2	% CHANGE
		Vs WAVE 1
Yili	111	+26%
Coca-Cola	91	+3%
China Mobile	81	+32%
Lenovo	75	+8%
adidas	59	+72%
Li Ning	57	+42%
Haier	32	+20%
Mengniu	31	+13%
Nike	24	-24%
McDonald's	23	+32%

"Yili's communication has done an excellent job building association with Liu

Xiang and emphasizing performance – and what’s more, they have supported it with a host of integrated marketing initiatives” said Greg Paull, co-founder and Principal of R3, based in Beijing. “For sure, success leading to 2008 won’t come from 30 second advertising alone” he added

“伊利的宣传活动非常出色，与代言人刘翔有效建立起密切的关联，其表现令人惊喜 - 更重要的是，他们组织、发起多种整合营销活动来对其宣传进行支撑。”常驻于北京的胜三公司创始人兼总裁包贵革先生说，“可以肯定的是，要将成功持续至 2008，绝不是一朝一夕或一条 30 秒的广告就能够实现的。”包先生说。

The OP Index forms part of an ongoing benchmarking research that R3 is producing in China in conjunction with TNS Sport. As the games draw closer, it will involve over 16,000 face to face interviews in ten Chinese cities. To perform well on the OP Index, a company needs to achieve high awareness of their Olympic association, strong purchase intent because they are a sponsor, excellent promotional impact, and a close association with the Olympic values. These results are the second in a series of eleven rounds of benchmarking culminating in the 2008 Beijing Olympics. And already there are some significant shifts.

OP 指数是胜三与 TNSsport 中国共同开展的一项奥运调查中的一部分，该调查为持续性衡量基准调查，至 2008 年北京奥运时共将完成 11 轮。随着奥运赛事的临近，该调查将在中国 10 城市中进行超过 1 万 6 千次面对面访问。为了能够获得较高的 OP 指数得分，一家公司需要拥有高度的奥运关联认知，强大的购买倾向（由于其赞助身份），出色的宣传影响力与良好的奥运理念契合度。文章前面提到的数字是业已完成的调查第二轮的结果。从中已经可以观察到一些明显的起伏变化。

Global sponsors Coca-Cola, Lenovo and McDonald’s all maintained their spots in the top ten brands. Vincent Cheung, head of the project at TNS Sport

commented “Coke still dominate in terms of promotional impact as they did in the first wave. Few companies have invested as much into insights in China, and at this stage, it is paying off” he added.

全球奥运赞助商可口可乐、联想、麦当劳仍位列前十。TNS Sport 公司该项目的负责人张荣辉先生说：“本轮中可口可乐公司在宣传影响力等方面继续保持领先。他们投入大量资金来获得对中国市场更为深入的理解，很少有其他公司能够做到这一点。而现在，这种投资得到了丰厚的回报。”

Sports brands hold down three of the top ten spots, even though only one (adidas) is an official sponsor. “adidas is the fastest mover in the top ten this month because it drove strong promotional impact, mostly at the expense of Nike” said Mr Paull. “This whole category continues to be the most dynamic of the ones we are measuring” he added.

体育品牌也在前十名中获得三席，虽然这三家公司之中，只有阿迪达斯一家是奥运官方赞助商。“阿迪达斯在本轮调查前十名中进步最大，可见的是它的宣传影响力大大提高。而竞争对手耐克则没有这么好的运气，”包先生说，“整个体育品类仍为我们测量的所有品类中最为活跃的一支。”

Nike, Li Ning and Mengnui, all ‘non-sponsors’ of the Olympics performed better than 30 other multinational and local brands in this research. Vincent Cheung of TNS Sport explains “There’s an expectation from the Chinese consumers that these brands are either so big or so integral to sport, that they *should* be a sponsor. This kind of confusion will be a challenge for all. It also suggests that ambush marketing may well be something we see more of in the coming months”

耐克、李宁、蒙牛这三家公司并非奥运赞助商，但是他们在调查中的表现甚至优于其他 30 家国际或本土赞助品牌。张荣辉解释说：“中国的消费者有一种心理期待，

他们认为这三家公司或者实力雄厚或者与体育密切相关，他们理应是奥运赞助商。

对于所有官方赞助商来说，这样的混乱将会成为一种挑战。这样的结果也提供给我们一些建议，在今后的数轮调查中我们将更多的注意这些伏击营销行为。”

MORE ON THE OP INDEX

The OP Index is an equally weighted benchmark of four core measures tracked every three months through 1,500 interviews in ten Chinese cities. It balances brand performance in awareness (brand correctly mentioned as sponsor), purchase intent (brand is more likely to be purchased as a result of sponsorship), promotional impact (brand's Olympic messages have made a positive impact) and brand association (brand is appropriately aligned with the Olympic ideals). The benchmark is weighted from the first wave of research conducted in July 2006.

The next wave of results will be complete April 2007 . **For more information**

contact Greg Paull at greg@rthree.com.cn

关于 OP 指数

OP 指数是对四个核心因素进行等权重计算得出的一种衡量基准，这四个因素来自胜三 TNS Sport 奥运调查项目。该调查每三个月进行一次，访问中国 10 城市中 1500 名被访者。它对品牌在认知度（正确指出品牌为赞助商）、购买倾向（由于品牌赞助行为而更有可能购买该品牌）、宣传影响力（品牌奥运信息传递产生积极影响）和理念契合度（品牌与奥运理念合理契合）几个方面的表现进行平衡打分。调查第一轮（2006 年 6 月）的结果被视为基线。下一轮结果将在 2007 年 4 月公布。

欲知更多信息，请联系包贵革先生 greg@rthree.com.cn

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 six of Asia's top twenty marketers, providing third party counsel on marketing services.

For more information , visit www.rthree.com

关于胜三

胜三是一家独立的营销顾问公司，目标是帮助亚洲市场主以及他们的广告代理公司提高其效率和效力。公司初创于 2002 年，目前与亚洲顶尖的 20 家企业中的 6 家合作，提供其第三方的独立营销咨询服务。

欲知更多信息，请浏览 www.rthree.com

About TNS Sport China

TNS Sport China was established in 2003, in a partnership between CSM Media Research and TNS Sport Global, tapping into the former's eight years of China insights and the latter's ten years of global sports research leadership. Already TNS Sport has proven case studies working with the NBA, CSL, EPL, F1 and CBA

For more information, visit www.tnssport.com

关于 TNS Sport 中国

TNS Sport 中国创建于 2003 年，是索福瑞媒介研究和 TNS Sport 全球在中国的合资企业。它继承了前者在中国地区 8 年的从业经验和后者 10 年全球体育调查的领先技术。TNS Sport 中国已经通过与 NBA，中超，英超，F1 and 中国篮球联赛合

作的成功案例证明了他们的实力。

欲知更多信息，请浏览 www.tnssport.com

About CSM Media Research

CSM Media Research manages TNS Sport in China, in addition to running China's largest ongoing media research in China, reaching 143 cities and 41,300 homes on an ongoing basis.

For more information, visit www.csm.com.cn

关于 CSM 媒介研究

CSM 媒介研究拥有目前中国最大的媒体调查网络，该调查网络覆盖中国 143 个城

市，一共有 41,300 个样本户。TNS Sport 中国为其下属公司。

欲知更多信息，请浏览 www.csm.com.cn

