



Press Information

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TNS' Holistic Approach Shows Olympic Games Sponsors Go for Gold in Beijing

New York, NY, August 21, 2008 – As the Olympic Games come to a close, TNS Custom and TNS media combined their extensive research surrounding advertising during the Beijing Olympic Games. The research mainly focuses on six top advertisers picked from worldwide and US sponsors of the Games: AT&T, Bank of America, Coca-Cola, Lenovo, McDonald's and VISA.

Among the key findings, TNS found that brand marketers leveraged the widespread international attention for the Olympic Games to tap into high-running emotions and feelings of national and international unity. With the US in particular, consumers had favorable reactions to those brand messages, and interestingly, had equally favorable reactions to the quirky humor of Lenovo, whose TV advertising was loosely connected to the Games.

The following outlines top-line findings, including analyses of creative messaging, ad effectiveness and recall, consumer chatter generated in social media and online traffic.

Creative messaging – from traditional to offbeat

TNS media intelligence analyzed six weeks of advertising creative messaging through the opening weekend of the Games using AdScope, its multimedia creative monitoring solution.

Global unity: a theme that united (most) worldwide sponsors

“Global unity is *the* quintessential Olympian theme, and it proved very popular among worldwide Olympic sponsors,” said DeWitt Mallary, chief operating officer, AdScope, TNS media intelligence. Coca-Cola, VISA and McDonald's, longtime Olympic advertisers, all featured some variation of the world coming together for the Olympic Games.

In contrast, Lenovo's messaging stood out by its indirect connection to the Olympic games. Lenovo's ads prior to the opening ceremony didn't include any sports messaging except for the Olympic Rings logo. During the opening ceremony, Lenovo introduced one sports-themed ad featuring Japanese sumo wrestlers as well as the Olympics Rings logo. This approach was met with mixed consumer reactions as unaided ad recall rated low in the TNS custom study and had mixed effectiveness.

U.S. diversity: the message for domestic sponsors

“The US' ethnic diversity was the common theme for both Bank of America and AT&T, although each brand emphasized different aspects in their creative executions,” said Mallary. Bank of America's TV campaign “hometown hopefuls” described the aspirations of ethnically-diverse athletes, linking their opportunity in America and their sponsorship by Bank of America. Interestingly, Bank of America was the only advertiser studied to directly promote its user-generated and social media elements through online advertising – inviting America to cheer for an athlete.

AT&T also showcased multicultural and multi-generational characters and athletes, but overall its spots – especially before the opening ceremony – placed a heavier emphasis on product performance and price compared to other sponsors monitored.

Media allocation: TV is still king

While NBC embraced a multi-platform distribution strategy for the Beijing games, AdScope's analysis shows that marketers still rely most heavily on TV (with twice as many TV creatives as compared to other media). This ties in with recent historical trends as these marketers significantly increased their TV spending between the 2000 and 2004 Olympics (with the exception of Lenovo/IBM due to the ownership change).

Total US TV* advertising expenditures during summer Olympic games programming

Advertiser	1996 (Millions)	2000 (Millions)	2004 (Millions)	% Change '96 vs. '00	% Change '00 vs. '04
AT&T	\$21.5	\$40.8	\$83.6	89.5%	105.1%
Bank Of America	\$0.9	\$13.0	\$21.6	1329.3%	65.6%
Coca-Cola	\$53.6	\$27.9	\$41.2	-48.0%	47.8%
IBM	\$28.7	\$33.7	\$0.0	17.2%	-100.0%
Lenovo					
McDonald's	\$42.0	\$21.6	\$32.8	-48.5%	51.6%
VISA	\$25.2	\$29.4	\$49.4	16.8%	68.0%
Advertiser Total	\$172.0	\$166.4	\$228.5	-3.3%	37.4%

* Network and Cable TV only.

Most memorable ads

TNS Custom's study for the first week of the Games revealed a significant gap between the top three brands and all other advertisers for unaided ad recall. Coca-Cola, McDonald's and VISA far outstripped the other brands mentioned. The next significant grouping who fell a long way behind in recall numbers, included Budweiser, Nike, Chevrolet, Home Depot, GE and United Airlines.

Top 3 marketers in unaided brand recall

	Unaided recall for Olympic viewers	Recall for those very interested in the Olympics	Recall for those with little or no interest in the Olympics
Coca-Cola	21%	33%	9%
McDonald's	15%	21%	7%
VISA	11%	17%	4%

During the first week of viewing, unaided brand awareness for ads seemed surprisingly low with over 52 percent of Olympic viewers surveyed unable to recall any brands advertised during Olympic programming. Recall was highly dependent on level of interest in the Olympics; 32 percent of people surveyed said that they were highly interested and 37 percent had little or no interest in the Olympics.

Lenovo scored low for unaided ad recall (1%), but its "Sumo" ad fared much better in aided recognition tests even compared to Coca-Cola's "Birds Nest" creative. TNS Custom's Kirsten Zapiec, SVP Brand and Communications commented, "the Lenovo ad was interesting because it fared so poorly in unaided awareness but after viewing the ad, a relatively high level of people were able to recall seeing it (39% of total viewers and 58% for highly interested viewers). The creative clearly stood out amidst the other Olympic advertising but consumers are having a difficult time linking the ad to the Lenovo brand."

Coca-Cola, McDonald's and VISA are all long term sponsors with strong sponsorship recognition. The high unaided ad recall for Coca-Cola, McDonald's and VISA and sponsorship recognition suggest that these three brands have been the most successful in creating a strong synergy between Olympic sponsorship and their marketing efforts.

Methodology: The Olympic Games Viewing Study was conducted amongst 1147 US adults from August 14th to 17th 2008. The study was administered using an online survey of the TNS 6th Dimension Access Panel.

What's the buzz?

As part of the study, TNS Cymfony analyzed the level of discussion in social media for these six Olympic sponsors.

"Lenovo had a particularly strong finish, coming back from a modest Volume Index¹ of discussion before the Games (indexing at 64 in June and July), to tie the leader, McDonald's with a 145 index during the games," said Jim Nail, chief strategy and marketing officer, TNS Cymfony. Discussion around Lenovo was also the most positive among this group of sponsors, with a Favorability Index² at a positive 186, almost

twice as favorable as the average. While Lenovo's efforts resonated with online communities, it only represented 3.6 percent of all discussion about Olympic sponsorship.

McDonald's, Coca-Cola and VISA were by far the most discussed brands. Interestingly, all three had experienced above-average levels of discussion since June:

- McDonald's stayed flat during the game, yet favorability was positive and on par with other sponsors (at 100 favorability index).
- VISA dropped slightly during the games (with positive index of 115).
- Coca-Cola dropped a significant amount, though still staying above the average for all the sponsors (with a positive index of 98).

Bank of America and AT&T were runners-up for the bronze medal: Bank of America got the lowest coverage of all these sponsors (volume index of 20) and AT&T was next (63).

¹ Volume Index: Indexes the number of posts each advertiser receives to the median number of posts for all advertisers.

² Favorability Index: Represents the ratio of posts which reflect positive to negative sentiment toward the ad. A 100 index would indicate an even split between positive and negative.

Online visitor traffic surges

With the summer Olympic games well underway, visitors to NBC's Olympic site (www.nbcolympics.com) has doubled from 4.7 million during the first full week of the Games to 10.8 million during the week of August 10. In comparison, Yahoo!'s heavy promotion of the Olympics on its home page captured 15.9 million visitors the week beginning August 10.

"While Nbcolympics.com is clearly an Olympic hub, other online channels are benefiting from Americans' heightened interest in following the Games. Yahoo! Sports coverage of the Games is capturing nearly one in 10 US internet users. In addition, VISA's Go World site has seen a 437% increase in traffic and Lenovo's Olympic sites have seen a 59% increase." said Matt Pace, Director at Compete.

About TNS media

Established in more than 30 countries, TNS media explores all the media - print, radio, TV, Internet, social media, cinema and outdoors worldwide, 24 hours a day, seven days a week, and offers a full range of insights, analyses and audience measurement services.

TNS media combines the deepest expertise in the industry to provide media and marketing intelligence including advertising expenditure monitoring, advertising creation monitoring, audience measurement, market influence analytics, online consumer behavior tracking, news monitoring, sports sponsorship evaluation and more. The TNS media companies track more than 3 million brands and provide vital market intelligence to 16,000 customers in the world.

About TNS

TNS is a global market information and insight group.

Its strategic goal is to be recognized as the global leader in delivering value-added information and insights that help its clients make more effective business decisions.

TNS delivers innovative thinking and excellent service across a network of 80 countries. Working in partnership with clients, TNS provides high-quality information, analysis and insight that improves understanding of consumer behavior.

TNS is the world's leading provider of customized services, combining sector knowledge with expertise in the areas of Product Development & Innovation, Brand & Communications, Stakeholder Management and Retail & Shopper. TNS is a major supplier of consumer panel, media intelligence and audience measurement services.

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