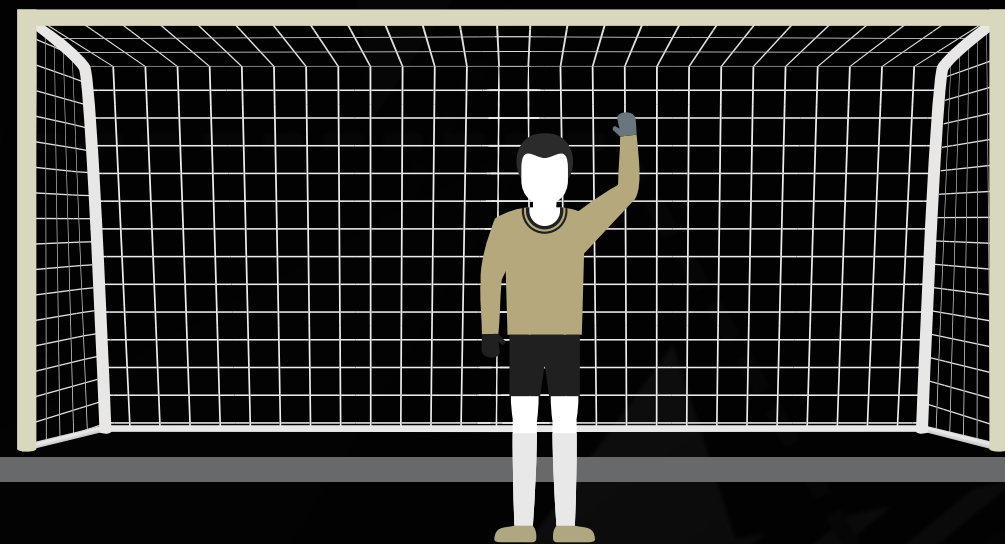


**RED
CARD
2019**

CHINA DIGITAL FOOTBALL AWARDS



Published by



MAILMAN





Foreword

Welcome to the Red Card 2019 report, now in its 8th year of publication.

The report identifies the number one European Football Club, League and Player online in China according to 8 metrics. The Red Card also includes the ‘China Digital Football Awards’ voted for by a panel of independent judges.

The last 12 months have seen consistent growth in the football industry. Sports IPs no longer simply target brand awareness online, the challenge has been to balance this with digital ROI. Brands started to develop new mediums in 2018, including Mini Programs, apps, branded content, and online/offline partner activations, to generate this return.

The online landscape has become more competitive with a third tier of football clubs launching. Their focus on peak moments throughout the season has been successfully adopted to create headlines through original video production, major campaigns and new platform launches. Content producers such as COPA90 are also using their unique ‘for the fans’ approach to build a football medium fan base.

For one of the first times ever, we’ve seen an ‘East to West’ movement with Douyin’s international version ‘Tik Tok’ becoming one of the world’s most downloaded apps, providing opportunities for football IP to establish themselves with new audiences.

The 2018 FIFA World Cup was a key catalyst for Chinese fans to follow football, claiming record viewing figures and online consumption. FIFA’s newly launched digital channels brought the event to life online with a unique approach to this market.

We hope that you enjoy this report and congratulations to everyone in supporting the growth of football in China.

Andrew Collins, CEO

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Judging Panel



Andrew Collins
CEO
Mailman Group

Andrew is the CEO of Mailman, China's leading sports digital agency and marketing platform. After acquiring Mailman in 2006, Andrew has transformed the company to become a global leader in China digital strategy, now supporting the world's best sports properties.



Godfrey Zeng
Executive Vice President Of PP Sports Media
Suning Sports

Godfrey is an experienced practitioner of the internet, sports and entertainment industry, and has been driving the growth of sports event operations, content production and platform management. He has accumulated rich experience in IPTV content operations and new media services.



Yu Hang
Executive Director
DDMC Fortis Limited

Yu Hang oversees all operations of DDMC Fortis' global sports businesses. He joined DDMC Group in June 2017 and is in charge of strategy for the entire DDMC sports sector. His previous roles include COO of LeSports and Director of Partnerships at Sina Sports.



Richard Ayers
Founder & CEO
Seven League

Richard is founder of the leading European sports digital marketing agency Seven League. Originally a BBC journalist who launched BBC News online, Richard has spent most of his career in media. His first sports business role was as Manchester City's first Head of Digital in 2011.



Li Shuangfu
Founder & CEO
Lanxiong Sports

Li Shuangfu is the co-founder and CEO of sports business media company Lanxiong Sports, a former NBA Reporter, and the first Chinese NBA reporter to visit the White House. He has published two books in Chinese: 'David Stern's Biography' and 'NBA and Business'.



Zhou Tianyi
Director of Operations
Weibo Sports

Tianyi joined Weibo in 2014 and led the construction of Weibo's sports vertical community. She established partnerships with sports networks including CCTV 5 and sports IP including the NBA. She has also led digital campaigns around major sports events.



The Winners



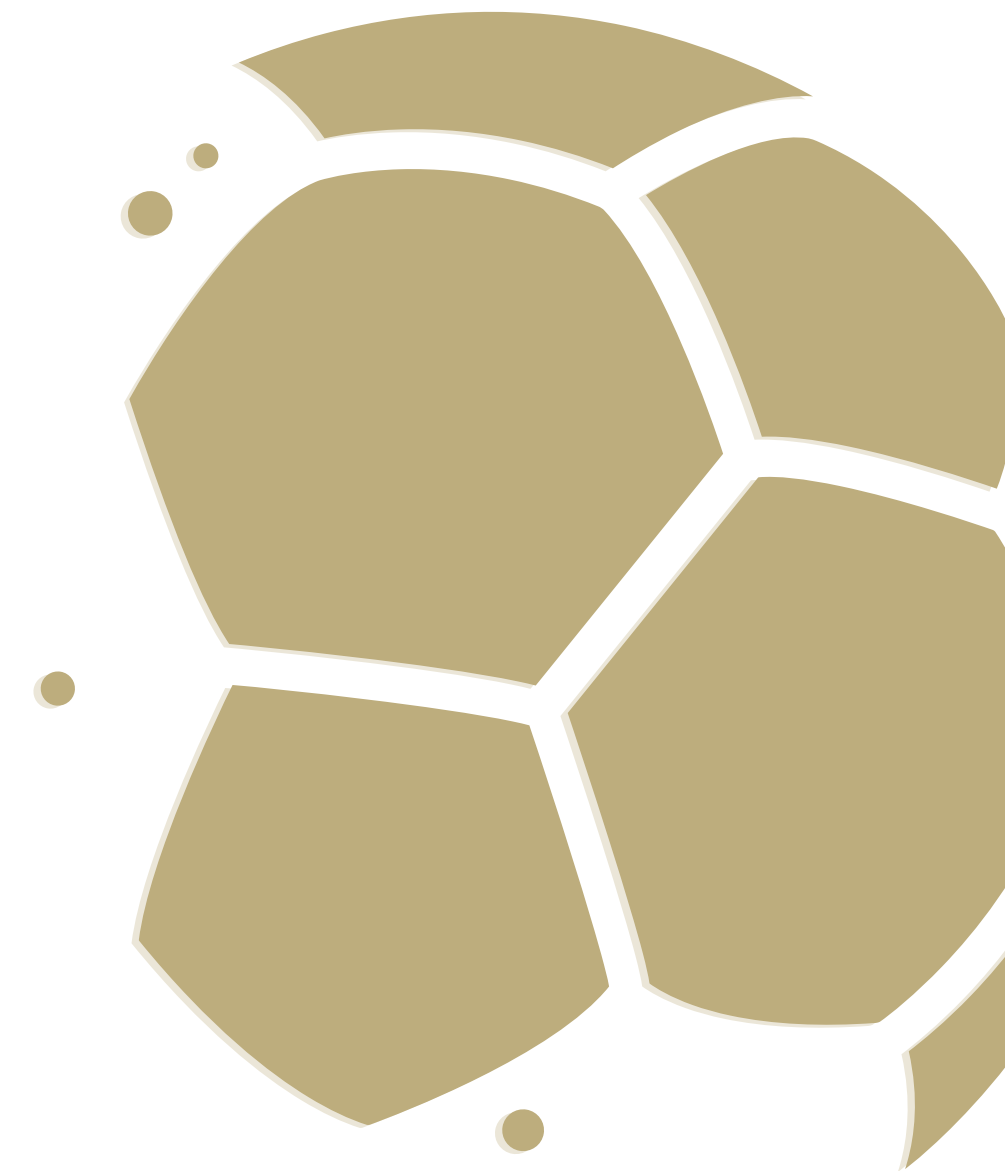
**No.1
Football Club
Online in China**
**Real
Madrid**

CR7

**No.1
Football Player
Online in China**
**Cristiano
Ronaldo**



**No.1
Football League
Online in China**
**Premier
League**



**Best
Digital
Campaign**
Arsenal

COPA90

**Best
Original
Content**
COPA90

FIFA

**Best
Sponsor
Activation**
FIFA



**Best
China
Innovation**
Juventus



**Best
O2O
Activation**
FC Bayern



**Digital
Development of
Football**
CFA



No.1 Club Online in China Real Madrid C.F.



Real Madrid's Winning Year

The most followed club on Douyin and Toutiao, part of the Bytedance ecosystem, with **around 1 million total followers**

The second fastest growing club across all platforms with **over 1.2 million new followers**

This was despite a net loss of **around 8,000 followers** following the Ronaldo transfer to Juventus

Extensive activation of the **partnership with the Weibo platform** through content and advertising

Over 50 million Weibo reads around their 13th Champions League success

“We’re delighted to be named as the number 1 club online in China and receive the Red Card 2019 award. Without a doubt, China represents an increasingly important scenario for all European football clubs. We worked hard to innovate and move with the fast-changing landscape and this is reflected in our digital growth and commitment. The club’s relationship with its fans in China is extremely important and we’re glad we can repay their faith in the team by staying engaged with them across all digital channels.”

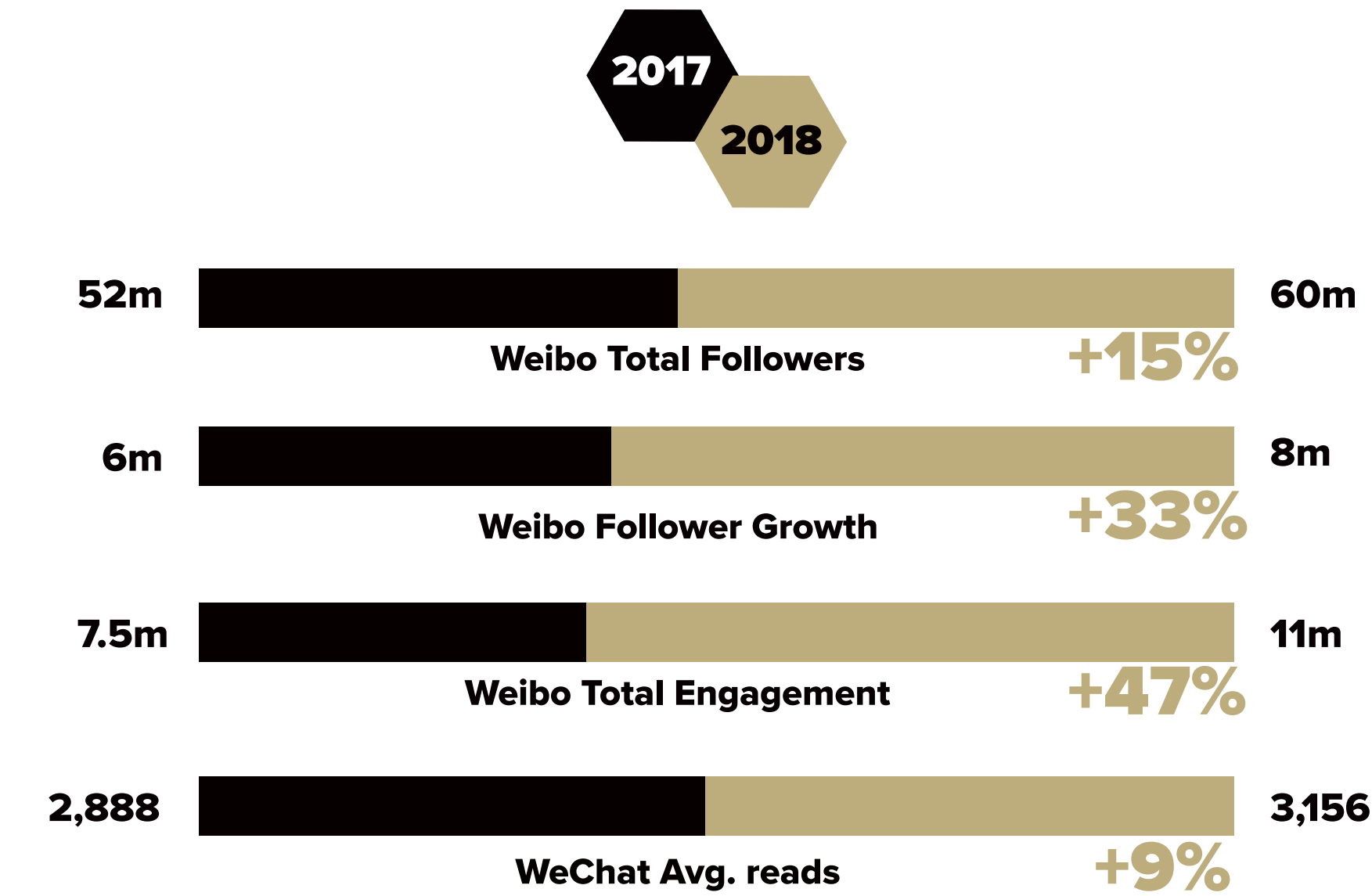
Real Madrid C.F.





European clubs’ digital strategy has shifted as the traditional presence including Weibo, WeChat and a website has become outdated. Websites are now redundant as user behaviours adjusted and new platforms emerged to serve this mobile-centric audience. WeChat is heavily driving this development with its Mini Program growth, able to replace apps and websites. Many clubs have recognised the difficulty in driving users to owned channels and have therefore invested in these newly established platforms. Douyin has become a major player in driving brand awareness in China, whilst Dongqiudi, Toutiao and owned platforms such as WeChat Mini Programs have become a prerequisite for all European clubs with ambitions to succeed in China.

European football clubs continued to grow in popularity in 2018, reaching 60 million total Weibo followers by the end of 2018. This included a cumulative 8 million new followers, a 33% higher YoY growth rate compared to 2017.



There are now over 70 teams online, and this year’s report has produced an even clearer divide amongst the European elite and challenger clubs. The **top 15 have on average 8.5x more followers** than the next 15 clubs, with **90% of the total Weibo engagement** generated by the top 15.

Real Madrid, FC Bayern München and Manchester United, **this year’s top 3**, and winners of the last 6 editions of the Red Card report, represent almost 50% of total WeChat reads, the most common representative of a club’s **die hard fans**. Meanwhile the top 10 clubs, including Juventus, Barcelona, Liverpool, Arsenal, Chelsea, Manchester City and PSG, are responsible for over 50% of total fan growth on Weibo.

The top 15 clubs in the Red Card 2019 report read almost identically to those who comprise the Deloitte Football Money League 2018, whilst the clubs’ positioning within both tables bear a close correlation. The high positive correlation (0.68) between the club revenue chart and the Red Card 2019 rankings indicate that a club’s **financial power and level of available investment has a direct impact on their popularity online in China**.

Deloitte Football Money League 2018		Red Card 2019
	1	
	2	
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	11	
	12	
	13	
	14	
	15	

Top 5 Club Posts in 2018

108K
Real Madrid:
Zinedine Zidane’s Resignation

102K
Manchester United:
Alexis Sánchez
Transfer Announcement

91K
PSG:
Fashion Designer
Collaboration Giveaway

24K
Juventus:
Cristiano Ronaldo
Transfer Announcement

21K
FC Barcelona:
Lionel Messi
Injury Announcement



No.1 Player Online in China Cristiano Ronaldo



Cristiano Ronaldo's Winning Year

Visited China as part of a Nike tour, coinciding with the launch of his limited edition China-specific boots

Original China content resulted in him becoming the **only player to reach 2M total annual Weibo engagement**

Became the brand ambassador for Chinese automotive brand, Wey; promoting their premium SUV models

Juventus gained over 126,000 followers following his transfer, with content focused on him 280% more engaged

Leveraged his online popularity to launch a Nike lifestyle collection exclusively in China

"I'm very happy to win the Mailman Red Card award for Best Player online in China. I have been lucky to visit the country several times over the last few years, so building a relationship with my Chinese fans is very important to me."

Cristiano Ronaldo



2.
Neymar Jr



3.
Lionel Messi



4.
Thomas Müller



5.
Mesut Özil



2018 was the year of the athletes online in China. Fans have become more obsessed with individuals, as players have almost 30% more combined followers than their clubs. The FIFA World Cup was a clear driving force behind this increased following, with over **97% of the annual follower growth generated after this tournament**. This icon market phenomenon is even more important for sports IP to understand and leverage. From a digital performance perspective, **Cristiano Ronaldo's average Weibo engagement is around 70x higher than Real Madrid**, meanwhile his transfer to Juventus has been integral to their digital growth, as the club climbed six places to fourth in the Red Card rankings.

Player accounts grew by 56 million total followers in 2018, 11x higher than the previous year and 7x higher than club accounts. This social growth was evident across every tier of athletes, however, the interest from mainstream fans is still heavily concentrated around elite level athletes. This was proven by the fact that Cristiano Ronaldo was able to win back his status as the number one player online, as well as the top 5 posts of the year being published by **Cristiano Ronaldo, Lionel Messi and Neymar Jr.** This is yet another indication of the dominance of these three players, as the 3 accounts **account for 75% of total engagement** of all players online in China.

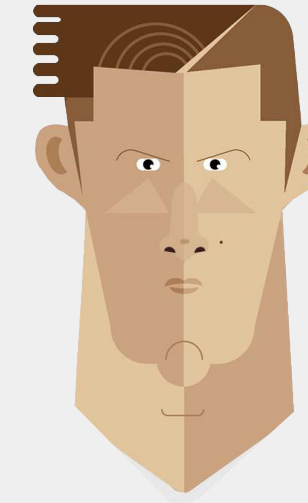
We have also seen a gradual growth in the number of players launching an official presence on Douyin, with Thibaut Courtois being one of the first. He has since been followed by several other players including Paul Pogba and legends such as Ronaldo on the platform. Neymar Jr was the most recent player to launch online, highlighting his dedication to the Chinese market, and going some way to explaining his success in overtaking the Red Card 2018 winner Lionel Messi.

Despite the huge follower growth of the players, many are still missing a clear digital strategy in China. **Less than 5% of the total social content output from players is created uniquely for China**, with the rest being localised from global channels. Many die-hard Chinese fans have access to these global platforms, including Instagram, Facebook and Twitter through VPN services, which as a result leaves many fans without any value-add from their Chinese presence. This will be a major challenge for the athlete digital landscape in 2019.



The Year of the Players

Cristiano Ronaldo's Average Weibo Engagement is Around 70x Higher Than Real Madrid



97%

Annual Follower Growth Generated After The World Cup

Weibo Player Accounts Grew By 56 Million Followers

11x

Higher Than The Previous Year

7x

Higher Than Club Accounts

Top 5 Player Posts in 2018

495K

Lionel Messi: Thanks Chinese fans for support at the FIFA World Cup

172K

Neymar Jr.: Thanks Chinese fans for support at the FIFA World Cup

133K

Neymar Jr.: Reflection on the FIFA World Cup

127K

Lionel Messi: Happy Birthday post

108K

Cristiano Ronaldo: Car giveaway featuring Wey



No.1 League Online in China Premier League



Premier League's Winning Year

First European league to launch an official Chinese App

Strengthened its existing Mutual Cooperation Agreement with the CSL by increasing support for youth, coach and referee development in China

First football league to launch on Douyin and Toutiao, with the **highest engagement and total follower base**

Audio rights were made available through a deal between talkSPORT and Ecosports, the Chinese media company

Higher WeChat reads than all other European leagues combined

"The Premier League and our clubs have a loyal and passionate fanbase in China and it is a great honour to receive this Red Card award. The Premier League is committed to delivering more and better localised content in Mandarin, which is demonstrated by the recent launch of our official Chinese app and introduction of a local editorial team.

"Our digital strategy for China supports our live events and the work of our broadcast partners to create even more ways to engage with fans. We look forward to continuing to develop our digital presence and bringing the Premier League closer to the millions of supporters in China."

Richard Masters, Premier League Interim Chief Executive



2.
Bundesliga



3.
La Liga



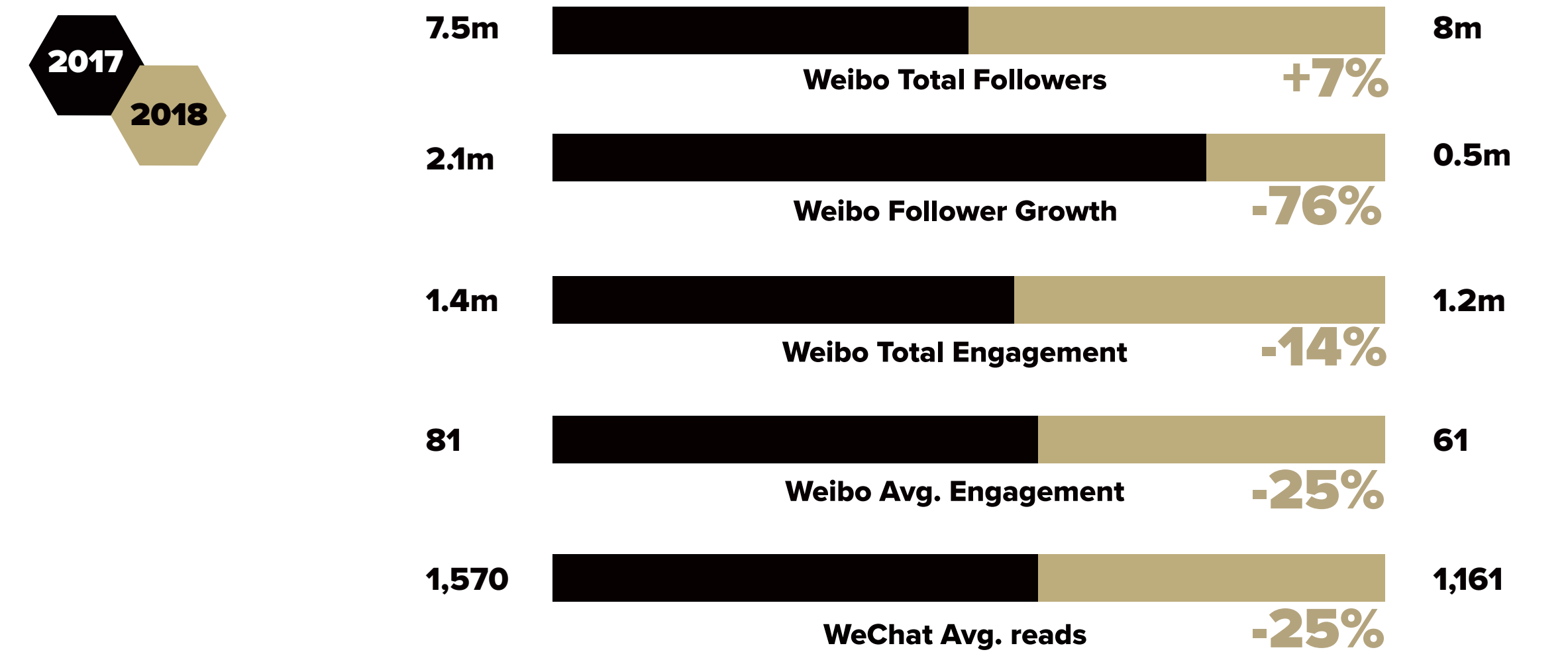
4.
Ligue 1



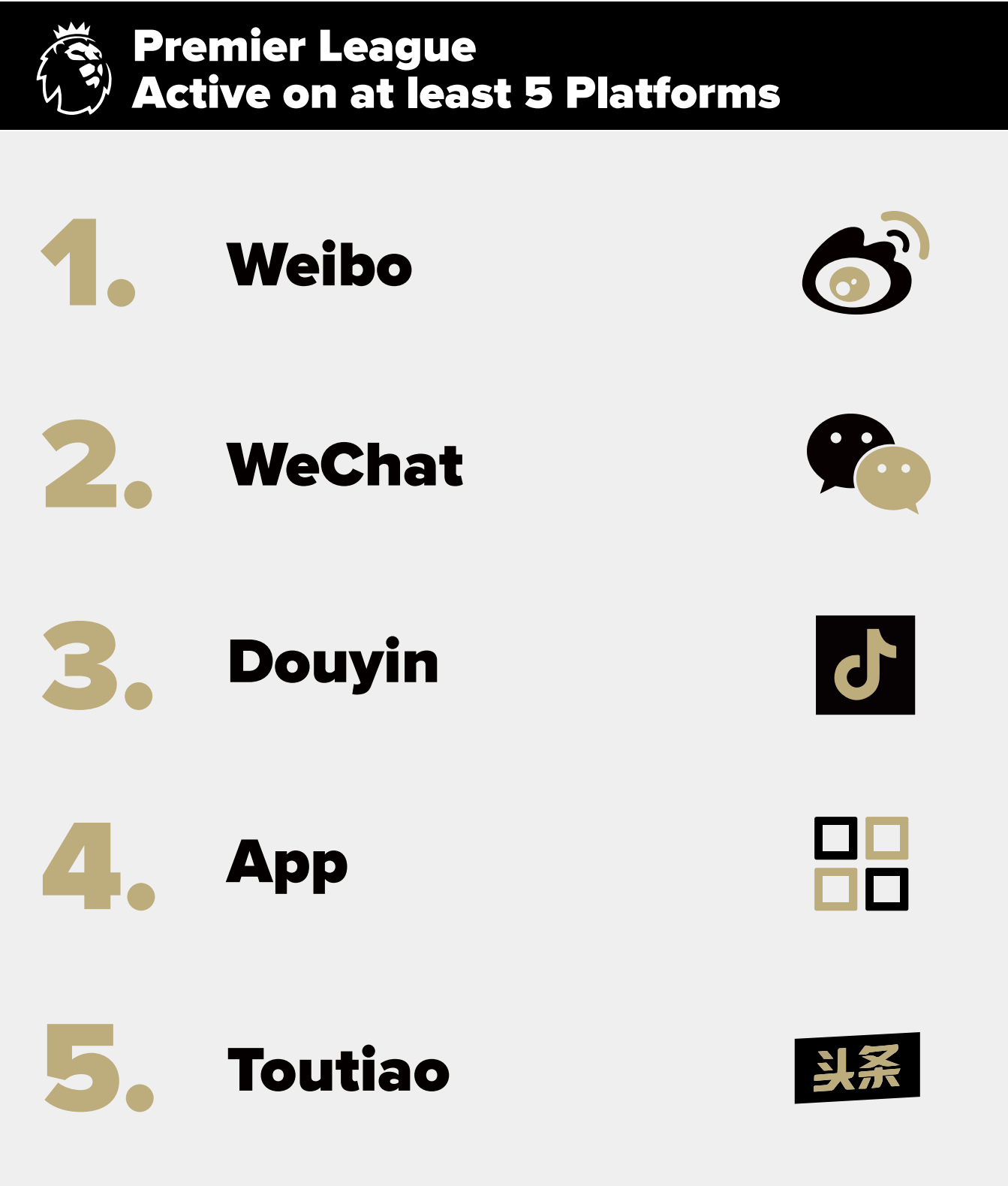
The Premier League was announced as the number one league online for the first time in the Red Card report. This year, leagues were challenged to diversify their digital presence on emerging platforms to reach new audiences with new content. The rise in the digital rankings for the Premier League is mainly due to this factor, with the league active on a minimum of 5 total platforms, including Weibo, WeChat, Toutiao, Douyin and their own local platform, the Chinese App. Three of these platforms were launched in 2018, creating new value for their fans.

The **Chinese app** was one of the most innovative digital launches of the year, becoming the **first football league** to do so and following only a small number of clubs. Nonetheless, 2019 will demonstrate whether a stand-alone iOS / Android app is the optimum way to reach and engage fans instead of developing a Mini Program, which has the benefit of existing within the WeChat ecosystem. The innovation and commitment from the league though is clear to see, and this digital product will further enhance the growth of the industry. The league’s launch on Douyin was also highly successful, yielding one of the highest levels of engagement of all football brands.

There were no new competitors to the four European football leagues online in China, with Serie A and others yet to make a move in market. There was however competition from federations, as FIFA launched online in early 2018, becoming the most followed football organisation, and UEFA relaunched their accounts after around 12 months of inactivity.



In a FIFA World Cup year, there was large disconnect between Chinese football fans and European leagues. Compared to the growth of clubs and players, the leagues have struggled to grow across key performance indicators on traditional platforms. The **Bundesliga was the only league to experience significant growth on Weibo**, with around **250,000 new followers**. The attention of the fans moved away from domestic competitions and towards the national teams, clubs and more importantly, the athletes. Rebuilding this relationship will be key for 2019.





RED CARD 2019 **CHINA DIGITAL FOOTBALL AWARDS**



Best Digital Campaign Arsenal



Digital Campaigns provide football IPs the opportunity to tackle a challenge they're facing with an innovative response, or leverage a Chinese fan insight to develop a creative response. Digital campaigns provide peak moments around the foundation content, becoming the stories that are shared online and offline between fan groups. An outstanding digital campaign includes emotion, and combines club values with a local story.

Campaign Results

19 Million Page Views

16 Million Video Plays

50,000 interactions

On Arsenal's Official Weibo and WeChat.

Winner China Profile

Fourth most followed team on Weibo

Sports bar and restaurant established in Shanghai

Second most read European club account on WeChat

The campaign #MerciArsene was voted as the Best Digital Campaign. Original China content was created and published across Arsenal's official digital platforms in China using the hashtag #MerciArsène (#谢谢你阿尔塞纳#) to make the Chinese fans part of the coach's final moments. The club worked with Total Soccer, the leading weekly football show on CCTV Sports, to broadcast four #MerciArsène China episodes at the end of the Premier League season.

"The announcement that Arsène Wenger was to leave Arsenal after 22 years in 2018 was a huge moment to celebrate globally. The #MerciArsène campaign integrated rich content in various forms, which was distributed and shared across and beyond Arsenal's own digital architecture in China. Active interaction, facilitated discussions and localised user generated content contributed significantly to the success of this campaign. Through the fantastic results, over 160 pieces of content were produced, 50 million page views and 16 million video views - we were glad to witness again the scale of Arsenal's huge and passionate fanbase in China, and how we were able to reach and engage a much larger audience. We are very proud to have the #MerciArsène campaign recognised by the Red Card 2019 China Digital Football Award."

Charles Allen, Head of Marketing

Notable Mention: Paris Saint-Germain



Results:

Over 11 Million total video views, 160K new followers

PSG leveraged its local digital reach with a series of creative original content pieces during its Asia Tour, in which players met different aspects of the Chinese culture. In addition, PSG utilised the popularity of their new female Chinese superstar Wang Shuang to produce exclusive content for China. One of the giveaway campaigns, a collaboration with a Singaporean local designer, reached over 93,000 engagement on a single post, becoming the third most popular Weibo post in 2018. The club also launched two new social platforms, DQD and Douyin, around this.



Best China Original Content

COPA90

COPA90

Chinese online fans now demand content produced solely for them. This has become a major trend in the last 12 months with numerous football brands creating original China content. Such content can come via a number of different mediums, including video production, live stream shows, technical development and H5 programs. The winner of this award has shown an exceptional creative concept that is suited to the local values and culture.

Campaign Results

The two episodes reached over

1 Million Total Views.



Winner China Profile

First football media business to launch in China

Gained 1.1 million followers, becoming one of the fastest growing football accounts online

32.7m total video views since launch in June 2018

COPA90 was awarded the Best China Original Content for their Derby Days video series with Beijing Guo'an and Shanghai Shenhua.

COPA90 produced their first original video content for the Chinese market with the bold aim of a 2-part documentary. The 'Derby Days' concept followed the fixture between Shanghai Shenhua and Beijing Guo'an, one of China's longest running and most intense football rivalries. COPA90 spent one week with a group Shanghai and Beijing fans prior to the derby to discover the history of this fixture and how the clubs lives on through their everyday life. The 2-part series also explored how the dynamics of the fan groups have changed over the years. On the day of the game, the team was present in the stadium to capture the best moments from the home and away reactions. This video was then launched across all COPA90 China digital channels.

We are absolutely honoured to have received this award for Best China Original Content. At COPA90, we pride ourselves on telling the most incredible stories from the world of football and this piece on China's oldest and most storied footballing rivalry - the China Derby - is the tip of the iceberg for us in terms of the potential for stories that we feel exist in the region. Looking ahead to 2019, expect more original productions from the COPA90 China team, exploring all angles of both the Chinese and global game.

Ross Whittow-Williams, Chief Operating Officer

Notable Mention: Southampton FC



Results:

The 18 part series reached 68 million total impressions across platforms.

Southampton FC took a unique approach to China digital by producing a viral video concept around the journey from Beijing to Southampton. Two Chinese celebrities were joined by two club coaches as they travelled for 12 days by train through China, Russia and Europe. The production team on hand were able to record the best moments from each day, as well as live stream content as the group arrived in Southampton for a match at St Mary's Stadium.



Best Sponsor Activation

FIFA

Digital sponsor activation can deliver a number of benefits for football brands, partners and Chinese fans if activated correctly. This is a growing part of the China digital monetisation phenomenon, a large focus of European football IPs in China to drive ROI from their marketing spend. This award recognises sponsor activations that were authentic, innovative and localised to appeal to the unique tastes of Chinese football fans.

Campaign Results

66

Million Total Impressions

#1

Sponsor Digital Activation
From FIFA in China



30,000
submissions

Fan Dream Team
Campaign

Winner China Profile

Launched online in China
in March 2018 ahead of
the FIFA World Cup

Most followed football
organisation with over 9.4
million followers across

Most engaged football
account of 2018

The FIFA World Cup Fan Dream Team by Hisense won the Best Sponsor Activation

The FIFA World Cup Fan Dream Team activation was launched with a bespoke H5 game developed for Chinese users. The H5 game was hosted on the FIFA China microsite, with traffic driven from all social platforms. Hisense was integrated throughout the product with logo exposure in the H5 game, as well as LED boards in the team selection process. On social channels, the FIFA World Cup and Hisense accounts published branded content, including videos and motion graphics to encourage fans to select their team and update throughout the stages. At the end of the tournament, Hisense was able to select 5 Chinese Grand Prize winners to win an LED TV.

"The FIFA World Cup was about bringing FIFA's fan community together and celebrating the FIFA World Cup as never done before. By launching the Fan Dream Team, we were able to create a real value add for the Chinese fans online, as well as further integrating Hisense, one of our China FIFA World Cup Sponsors, to the tournament. We're looking forward to launching new innovative digital sponsored programs in 2019, deepening our connection with the fans and our commercial partners in China."

Christian Volk, Head of Digital Marketing

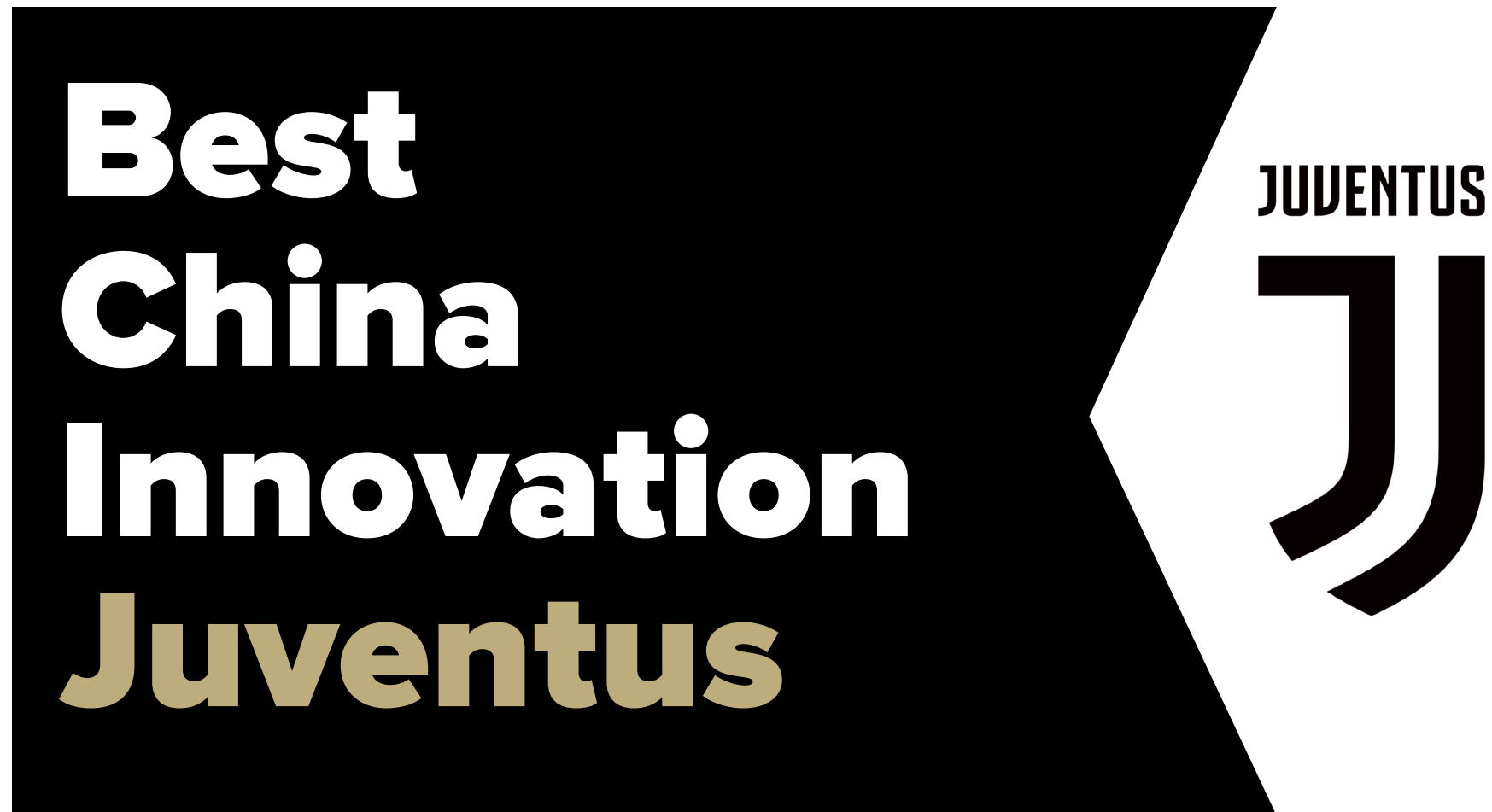
Notable Mention: Tottenham Hotspur



Results:

WeChat: 2.5m+ impressions,
6,300 entrants, 763,000 clicks

In a bid to capitalise on the increasing popularity of mini games within the WeChat ecosystem, Tottenham Hotspur's 2018 Chinese New Year campaign centred around a WeChat optimised H5 game. Central to this activation was the support and exposure of two major Club sponsors, AIA and Leagoo, both incorporated into the game and providing exclusive prizes. The Club partnered with Tencent to live stream the final training session before the North London derby, promoting the club's CNY activations throughout.



As the Chinese sports market is becoming increasingly saturated, it is more important than ever to stand out from the competition with new digital innovations. The winner of this award has shown dedication in China to find a new creative way to engage with current and potential fans.

Campaign Results

2 Million Video Views

400,000
total followers
by the end of the year

Winner China Profile

Juventus were the highest moving club in the Red Card 2019 top 15 club

#C罗转会尤文#, reached 200M hashtag reads, celebrating CR7's arrival to Juventus

Second fastest growing European team on Weibo in 2018 with around 650,000 new followers

The club won the Best Innovation award as they became the first European football club to successfully launch on Douyin.

The launch on the platform coincided with the club's Champions League Quarter Finals against Real Madrid. In the two week launch phase, Juventus' account published daily 15-second videos around the best moments between Real Madrid and Juventus as well as a second layer of original content, including club mascot Jay dancing to the latest Chinese pop music. This launch follows the club's 'be first' reputation after their VR app, club TV channel and app in China. By the end of 2018, 11 of the top 15 clubs in the Red Card rankings had launched an official Douyin account, following the example set by Juventus' successful launch. Douyin was the most downloaded app in 2018 with 500 million MAUs.

"With the launch of a Douyin account, Juventus continues the process it began in 2017 with the release of the Juventus VR app. The club is always open to looking at new digital platforms it can use to share engaging content for fans in China. Juventus' aim is to create a digital experience for Chinese fans which makes them feel close to the team and involved in the world of the Bianconeri."

Giorgio Ricci, Juventus FC Chief Revenue Officer

Notable Mention: Borussia Dortmund



Results:
200 avg. engagement,
5th most popular account
compared to European football clubs

Based on fan feedback from a market survey, BVB decided to launch an independent account for its mascot EMMA in China. This enables the club to tap into new target audiences and develop a new owned KOL. The Weibo account allows the club to communicate in a more informal tone with a different target group. For the announcement of the new mascot account, BVB arranged a 'mock' press conference that was published online.



Best O2O Activation FC Bayern



Offline events allow sports brands to directly engage with Chinese fans and their culture. Digital amplification plays a crucial role in opening the event up to the rest of the country who are not able to attend. The winner demonstrated an exceptional understanding of how to maximise digital engagement whilst in China by translating offline events to their online platforms. online platforms.

Notable Mention: Manchester United



The objective of the event was to launch a major fan event that could also drive mass media exposure and provide commercial value for Club partners in their key market. #ILU Beijing is an integrated campaign that encompasses O2O activation, partner integration, tech innovation and in-market fan engagement. Over 1,100 fans attended with 3,400+ ticket applications, an oversubscription rate of 396%.

Results:

10.7 million social media reach,
Coverage from 60+ media networks, 118 partner activations

Winner China Profile

Moved into the top 2 of the Red Card 2019 rankings with a strong holistic digital presence

Highest average engagement of all football clubs on Weibo

One of only two clubs to reach the Red Card top 3 for eight successive years

The German Champions won the Best Offline to Online activation with their China Youth Music Competition.

FC Bayern München demonstrated its commitment and support to the cultural exchange between China and Germany with the China Youth Music Competition in cooperation with Tongji and Tsinghua University. Top talent from both countries were invited to visit the Allianz Arena and sing the club anthem with the club's youth players during a concert at the team museum. FC Bayern München also supported the activation at Pudu Temple in Beijing and at the ceremony for the FC Bayern Tongji Scholarship.

“We are delighted to hear that our cooperation with CYMC has been selected as the Best O2O Activation. It reinforces again the specialty of FC Bayern’s strategy in China compared with other clubs. We stick to our commitment to the intercultural exchange between China and Germany. As here for example with an event-format which took place in the Allianz Arena in Munich which is our home, in Pudu Temple in Beijing with a history of almost 400 years, and at our partner Tongji University in Shanghai, where we grant FC Bayern Munich Scholarship every year. From online to offline, we have achieved a media reach of over 53 million.”

Zhang Li, Head of Media Relations

Notable Mention: Bundesliga



Results:

23 million hashtag reads,
2,200 attendance (all events sold out),
56k+ total engagement

Bundesliga created the “Bundesliga Fan Festival” with three fan viewing parties held in major Chinese cities, bringing together supporters from all Bundesliga clubs to follow the German national team. Bundesliga leveraged the leagues and clubs’ digital influence to inspire football fans all over China to support the German team and join the event, promoted by the hashtag - #在一起,德五星# (“together for the 5th German star”) and an H5 game for digital sign ups.



Digital Development of Football in China



The development of football is a key mission of the association, with several initiatives being launched by global and domestic football IPs to support this growth. According to a fan survey, around 60% of football fans never play football, meaning that there is often a lack of understanding around the game and its rules. This problem is rooted in the Chinese culture with the challenge starting from home and the previous generations' access to the game.

Campaign Results

300 Million Total Video Views

525 Million Total Impressions

The focus from the association in solving this problem is to target this younger generation to grow participation throughout the country. As this millennial audience is most easily reached through online platforms, especially via mobile devices, digital initiatives are the most efficient to educate the wider population and inspire a new generation of football players and fans.

During the FIFA World Cup 2018, the Chinese Football Association (CFA) launched a nationwide campaign to introduce the sport and educate around the technical side of the game. The CFA produced a 20-part cartoon series that was broadcast both on digital and TV networks while partnering with Xinhuanet to grow exposure of the concept throughout the media ecosystem. The original videos supported in delivering key football educational messages as well as conveying the spirit and culture of football. This was all communicated through an animated video format featuring Chinese elements such as pandas and local food.

The Red Card China Digital Football Awards is recognising this outstanding digital performance in developing the understanding and accessibility of football. The CFA showed how to successfully use digital platforms and new content formats to inspire this younger generation and grow football from a top-down perspective in China. This will also indirectly support the growth of the whole industry, including opportunities for the European football IPs.



"Through combining the world's most popular sport of football with one of China's most synonymous and cultural icons the Panda, we are able to deliver educational and entertaining content to football fans across China."

Huang Shiwei, Director of Media and Public Relations of the Chinese Football Association



ANNUAL INDUSTRY TAKEAWAYS AND OUTLOOK

FIFA World Cup China Digital Arrival

This 2018 FIFA World Cup Russia™ was the most successful in China so far. Despite the national team not participating, Chinese fans followed the tournament closer than ever with record viewership and interaction on the newly launched FIFA digital channels.

FIFA launched 5 local platforms, becoming the first football organisation with a Mini Program. Meanwhile, the launch on Weibo was celebrated with a ‘Pass The Ball’ viral H5 game which accrued **over 20 million ‘passes’**. During the tournament, FIFA produced original video content around 12 Chinese celebrities visiting the host cities and attending matches. Fan engagement activities were also developed including the Bracket Challenge by Wanda and Fan Dream Team by Hisense. These digital initiatives resulted in around 2 million new followers during the tournament, **8x higher than the NBA’s growth during the NBA Finals**. This growth has continued since the end of the tournament with Chinese coverage of the other FIFA events resulting in around 9.5 million total followers by the end of the year.

The FIFA Effect



FIFA’s digital arrival in China was not only beneficial for the Chinese fans, but also started ‘the FIFA effect’ as European football leagues, players, platforms and brands all experienced peak growth periods. European players had the largest digital impact, **with 50x higher Weibo follower growth** during the tournament compared to the previous period. This wasn’t limited to players at the tournament either, showing that the FIFA effect was widely felt. Leagues and clubs also benefited, with the Bundesliga experiencing **2x higher follower growth**, and Chelsea growing over 1 million followers.

The Weibo platform also benefited with a 48% year on year increase in advertising and marketing sales, thanks in part to the FIFA World Cup. A number of global brands also invested heavily on promoting the tournament and their relationship on Chinese digital platforms.

Member Association Rankings

There are a number of Member Associations active on Weibo and other social platforms, including Argentina becoming the first national team on Douyin. The FIFA World Cup was a peak period for the national teams, with several securing lucrative partnerships with Chinese brands. Despite Germany being knocked out early, they were the number one national team on Chinese social media with their existing popularity generating huge engagement around each match. England became known for their **‘happy football’ playing style** and their young football stars. Leveraging this popularity of the individual English stars will be an opportunity for each club now.

1.		Germany	50 points
2.		England	43 points
3.		France	30 points
4.		Brazil	20 points
5.		Portugal	16 points



Digital Commercialisation

2018 was a turning point for football clubs online in China. There was a shift in mindset from increasing brand awareness to generating new revenue streams out of this market. While sponsorship deals remain the largest source of revenue, digital commercialisation has increasingly become a core objective of European clubs in China.



Apps

Apps that offered content for free until 2017, started to include additional content behind a paywall. Juventus VR app added pay-per-view videos on top of its free content package. A multiple tiered product, from free to paid, has proven to be the most efficient way to convince Chinese fans to pay for content. Sports accounts, however, still have a long way to make the most of the existing Chinese digital landscape.



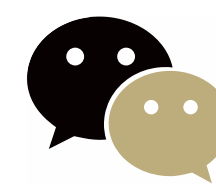
Douyin

Douyin Despite its growth in China with around 150 million DAUs on the platform, Douyin was not leveraged by sports accounts for delivering branded videos. The largest short-video platform in China will also become a popular resource for e-commerce in 2019, thanks to the possibility of linking branded accounts to a Taobao store as well as its own native e-commerce system.



Online Stores

Online stores continue to represent another major challenge for most European football clubs in China. Often, China e-commerce is tied into global e-commerce deals without taking into account this unique local landscape. At the end of 2018, only six European clubs had a local e-commerce presence in China. As a result, fans often have to pay large delivery fees and wait up to four weeks for their order to arrive. Clubs are missing out on the opportunity of increasing sales by being active on customer sites, such as Taobao, JD or TMall, and offer locally suited merchandise and prices.



WeChat

WeChat with its rich ecosystem of Mini Programs and payments remained relatively under-leveraged by football brands for what will become the platform with the highest rate of conversion. Products such as the digital memberships developed by Arsenal and Manchester City proved that offering a membership package tailored for Chinese fans within an existing China ecosystem have higher chances of conversion compared to the traditional global memberships.



Weibo

Weibo was the number one platform in terms of branded content in 2018. Chinese New Year and Double 11 were the two most popular events to be leveraged with each of the top 15 clubs publishing branded content. In addition, the top 5 teams collaborated with at least one of their partners to celebrate a club milestone in 2018. In both scenarios, China original short-form videos, typically under 2 minutes, were the most popular format.





What To Expect in 2019?

1. Douyin #1 Growth Platform

Internationally known as 'Tik-Tok', Douyin became one of the world's most downloaded non-game apps. Coinciding with the rise of short-form videos in China, Douyin reached more than 150 million DAUs within its first year and more than 500 million MAU's internationally by July 2018. We predict this surge in popularity to continue through 2019 with more clubs and athletes opening accounts. Douyin recently rolled out its mini-program feature allowing users to access various services without leaving the app.

2. E-commerce Growth

More clubs and athletes will open stores on e-commerce platforms in a bid to monetise their IP and merchandise. The online shopping industry, as demonstrated by Alibaba's Singles' Day, continues to grow each year. Consumers need to be met on their phones, and with the continuation of Mini Programs replacing apps, this will be the most popular destination for clubs and athletes to meet their fans buying merchandise.

3. Content Producers

A proliferation of fan-centric football media companies grew in popularity in 2018, with COPA90, Dugout and 90min all seeing opportunities and growth in China. All three opened official Weibo accounts, with COPA90 reaching 1 million followers within 6 months of launching. Fans are becoming more demanding of content 'outside of the pitch' with greater access to their idols. 2019 will see these platforms producing more localised content for the China market and dedicated contributors located across the country.

4. Rise of Women's Sports

The 2019 FIFA Women's World Cup presents a realistic opportunity for China's Women's national team to go far in a FIFA World Cup competition. Spearheaded by AFC Women's Player of the Year, Wang Shuang, the summer tournament will inspire the nation to follow the tournament again and grow a new generation of female football fans. Women's sports teams in China generally do better than the men's, therefore we expect to see China as a nation come together to support their country in France.

5. Summer of Football

In 2018, there was a noticeable lack of European football clubs touring China, mainly due to the International Champions Cup (ICC) not scheduling any games in mainland China. Southampton FC and Schalke 04 came to play matches in China, whilst the majority of European clubs opted for pre-season tours in America and Singapore. In 2019, we expect the European teams to return to China to grow their fan base and fulfill sponsor requests. How they amplify these tours online will be a key metric in determining their success.



			TOTAL	Weibo Followers	Weibo Follower Growth	Weibo Total Engagement	WeChat avg. reads	Douyin Followers	Toutiao Followers	E-Commerce	Club App	Change to Red Card 2018
1		Real Madrid C.F	75	3,470,462	5	19	20	10	4	5	5	▲ +1
2		FC Bayern München	61	3,795,003	4	20	12	7	0	5	5	▲ +1
3		Manchester United FC	58	9,318,276	1	12	20	0	0	3	3	▼ -2
4		Juventus FC	52	827,435	7	20	6	8	1	3	5	▲ +6
5		FC Barcelona	48	5,950,462	3	20	5	0	0	5	3	▲ +2
5		Liverpool FC	48	2,501,651	2	18	17	0	0	5	0	— 0
7		Chelsea FC	40	4,257,054	10	7	3	4	1	3	3	▲ +5
7		Arsenal FC	40	4,784,016	2	13	8	0	1	3	3	▼ -3
9		Manchester City	37	8,312,536	1	8	6	1	1	3	0	▼ -1
10		Paris Saint-Germain	36	1,512,629	3	14	3	6	0	3	3	▲ +5
11		Borussia Dortmund	32	1,777,784	2	13	4	3	0	3	3	▼ -3
12		Tottenham Hotspur	31	1,965,355	5	7	4	2	0	5	3	▼ -2
12		Inter Milan	31	1,036,385	5	8	4	2	1	3	5	▲ +1
14		AC Milan	29	1,169,784	4	9	9	0	1	3	0	▼ -9
15		Atletico Madrid	23	482,448	2	6	2	5	1	3	3	▼ -1

Methodology: The online performance were assessed according to eight different metrics. The data analysed was collected between January 1st 2018 - December 31st 2018. The platforms selected for analysis were determined according to their relevance in connecting with Chinese football fans and their popularity in China’s current digital landscape. The full methodology is available on request.

ABOUT MAILMAN

Est. 1999, Mailman is China's leading sports digital marketing agency. Headquartered in Shanghai, Mailman has over 120 exports across China, South East Asia, US and UK, powering many of the world's largest sports proprietries building a successful business in China.

Our services include:

Digital Strategy
Content Production
Technology
Social Media
PR & Brand Activation
Sponsorship
E-Commerce



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