

RED
CARD

RED CARD 2024

ASIA DIGITAL
PERFORMANCE INDEX



ONE SIXTY/NINETY



MAILMAN
A 160over90 Company

ENDEAVOR ANALYTICS

FOREWORD

Welcome to the 13th edition of the Red Card: Asia Digital Performance Index, a report that recognizes the digital performance of European football teams, leagues, and players online in China and the wider Asia region.

This year, we've expanded our usual China-only report to include key countries across Asia, where European football teams are investing more, namely in Indonesia, South Korea, Japan, and Thailand. Whilst China remains the most active region for European teams, leagues, and players, the other regions are growing in importance and impact, as highlighted by the growing number of teams launching official accounts and engaging fans on social media.

This year is also the first time we've collaborated with our colleagues at Endeavor Analytics to help bring further insights and data to the report.

Regarding China, firstly, a huge congratulations to Manchester City for winning the Red Card's most popular European football team online for the first time. The club had a stellar year on the pitch, including a treble, as well as an active 12 months in China and across Asia, fitting in a summer tour to Japan and South Korea.

Congratulations to the English Premier League, who remain top of the China digital league table thanks to their consistently impressive digital content, high output, and creative ideation. As for individual players, Cristiano Ronaldo remains an ever-present and pips Lionel Messi to this report's most popular player award.

In Indonesia, South Korea, Japan, and Thailand - we were excited to see more European football teams launch official X accounts, double down on region-specific content, and actively engage with their growing Asian fanbases.

Looking ahead to this year, UEFA EURO 2024 has every football fan excited, and it's great to see more and more brands from Asia, particularly China, partnering with the tournament.

I hope you all enjoy reading the report and find the insights and takeaways valuable.

Finally, a massive thank you to the team behind the Red Card report, who have once again outdone themselves.

Regards,
Gavin Hadley.
Vice President, 160over90



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#1 MANCHESTER CITY

Red Card 2024

Image Credit To CFP

CLUB WINNERS 2024

Real Madrid

500k+
New Followers On Douyin

4m+
Total Douyin Followers



Paris Saint-Germain

450k+
New Followers On Weibo

3.4m+
Total Douyin Followers












Manchester City

9m+
Total Weibo Followers

567k
Total Bilibili followers

CLUB RANKINGS

			TOTAL	Weibo Followers	Weibo Growth	Weibo Engagement	Mini Program / App	Douyin Followers	Douyin Growth	Douyin Engagement	Ecommerce	Social Ecommerce	Bilibili Followers
01		3 [↑]	62	7	2	11	5	5	5	11	5	5	6
02		5 [↑]	51	4	4	9	0	11	6	14	0	0	3
03		2 [↓]	45	3	5	7	0	9	2	11	5	0	3
04		2 [↓]	40	8	5	7	5	9	0	4	0	0	2
04		1 [↑]	40	4	2	8	5	5	2	5	5	0	4
06		1 [↓]	36	8	2	7	5	4	1	4	0	0	5
06		2 [↑]	36	3	3	4	5	4	1	4	5	5	2
08		3 [↑]	34	3	5	2	5	3	2	2	5	5	2
09		2 [↑]	32	4	2	3	5	3	3	2	5	5	0
10		7 [↓]	30	8	1	5	0	8	1	7	0	0	0
10		1 [↓]	30	4	2	4	5	2	1	2	5	5	0
12			29	3	3	3	0	3	2	3	5	5	2
13			27	3	2	4	0	4	1	4	0	5	4
14			24	3	2	2	0	6	4	5	0	0	2
15		2 [↑]	18	1	3	1	5	2	0	1	5	0	0

*Data collected from January 1st - December 31st, 2023. A full methodology is available on request.



LEAGUE AND PLAYER RANKINGS

League Rankings

	TOTAL	Weibo Followers	Weibo Growth	Weibo Engagement	Douyin Followers	Douyin Growth	Douyin Engagement	Bilibili Followers	Kuaishou Followers	App/Mini Program
01 	76	13	18	9	15	9	4	8	0	0
02 	53	14	12	5	8	5	2	2	0	5
03 	33	4	11	2	5	2	2	2	0	5
04 	27	3	18	1	1	1	1	0	2	0
05 	22	8	2	4	3	2	2	1	0	0

ENGLISH PREMIER LEAGUE HIGHLIGHTS:

- 1m+ new followers on Weibo
- 600k+ new followers on Douyin
- 750k+ new followers on Bilibili
- 1.7m in total Weibo engagement
- 11.8m in total Douyin engagement

The English Premier League has taken the top spot again, for the sixth year in a row. For Chinese New Year, the league innovated with Chinese Opera stars to produce original songs to celebrate the occasion. They also lead amongst football accounts on Bilibili, with the original content series 'How could you not like the EPL' dominating most viewed content against competitors.

Player Rankings

	TOTAL	Weibo Followers	Weibo Growth	Weibo Engagement	Douyin Followers	Kuaishou Followers
01 CR7	27	9	0	8	0	10
02 Neymar Jr	18	8	0	4	6	0
03 Lionel Messi	17	9	1	7	0	0
04 Thomas Mueller	11	8	0	2	1	0
05 Paulo Dybala	11	2	6	1	1	1

CRISTIANO RONALDO HIGHLIGHTS:

- 1.5m in total Weibo engagement
- Most followed footballer on Kuaishou

Ronaldo's social performance continues to be boosted by a fruitful official partnership with Kuaishou, alongside original messaging to Chinese fans around important festivals. Ronaldo's post for Chinese New Year reached over 5m views on Weibo.



WINNERS' ACTIVATIONS



The club's first drop of its Chinese New Year (CNY) special edition kit with PUMA, in the Year of Rabbit, got its fans excited globally with the kit selling out in just 24 hours.

The club also collaborated with the China Lunar Exploration Program in producing a CNY-related short film to elaborate the story of the kit design, which was to commemorate the 10th anniversary of China's first space equipment landing on the moon.

The club's treble-winning trophy tour in China brought the Champions League, Premier League, and FA Cup trophies, as well as the Super Cup, to City fans across Hong Kong, Beijing, Shanghai, Hangzhou, Zhengzhou, and Tianjin.



During the Year of the Rabbit, Real Madrid collaborated with Chinese table tennis legend Fan Zhendong. In the CNY video, Antonio Rüdiger and David Alaba engaged in a series of table tennis challenges, and at the final moment, they introduced Fan Zhendong in an "asking-for-help" manner. The video garnered a total of 2.11m views and over 70k engagements on Real Madrid's social media platforms.



This cross-disciplinary collaboration marks the first interaction between Real Madrid and Chinese table tennis athletes, contributing to the further enhancement of Real Madrid's influence in China. It also fosters mutual understanding and respect between Eastern and Western sports cultures, which is conducive to strengthening unity and cooperation in the international sports community.



PSG organized a special live-streamed dinner event to celebrate CNY featuring several KOL guests such as musician Guo Gan and Douyin star Chef Bao. The guests were joined by PSG Féminine player Li Mengwen, who completed her loan in Paris in the summer.

Taking advantage of a rare case of distribution rights for the UEFA Women's Champions League, PSG offered a live stream of the PSG Féminine match against Manchester United in the UWCL qualifiers on both Bilibili and Douyin. The result was a huge hit, with over 300k fans tuning in to watch PSG advance in the tie.



Throughout 2023, PSG leveraged the use of their dedicated host for China XiaoFei for a series of pre-match live streams and on-the-ground content, providing a direct outlet for fans in China to engage in the teams. Live streams were conducted for all Asia-friendly kick-offs.

REAL MADRID #2 in Red Card 2024

Image Credit To CFP



PLATFORMS MATTER

Weibo 605m MAU



The platform continues to shape public opinion, influence discussions, and take center stage during major sporting events, driving trending topics and serving as a vital partner for rights holders. Despite this, Weibo does face challenges in competing with other platforms growing in impact, including those involved in broadcast rights, live commerce, and short videos. Weibo's introduction of a new AI assistant allows sports fans to send private messages to athletes or celebrities, mimicking their style and tone to increase interaction.

微博粉丝突破



Douyin 750m DAU



Douyin is transforming from a platform primarily focused on short videos to a super app encompassing live streams, e-commerce, daily life services, and much more. It's also elevating sports media rights by acquiring premium tournaments, seamlessly integrating them with live commerce. Douyin is introducing a pay-per-view (PPV) feature that requires users to watch sports matches by making a payment. Additionally, the platform has formed partnerships with sports media rights holders such as Shinai Sports.



PLATFORMS MATTER

RED (XiaoHongShu) 260m MAU

小红书

As a lifestyle platform with a majority Gen Z and Millennial audience, RED excels in a wide range of industries, such as travel, beauty goods, and services. Well-known in China as a platform for research products and first-hand referrals, RED has the highest skew to female users of all platforms at 68%. As a lifestyle-sharing platform, RED has been placing significant effort into attracting more and more sports content, particularly during big sporting events. Several football clubs have accounts on the platform, and we expect to see more this year as football x lifestyle collaborations grow.



Bilibili 341m MAU

bilibili

Bilibili has diversified its content categories beyond ACGN, encompassing a broader range of lifestyle, sports, and entertainment content. The platform is implementing changes in viewer metrics, now indicating the accumulated length of time users have spent watching each video rather than showing the actual number of views. Known for its vibrant and creative user-generated content culture, Bilibili is recognized and embraced by the younger audience. It stands as the hub for the most diverse UGC and PGC on various topics.



STANDOUT MOMENTS OF THE YEAR

PARIS SAINT-GERMAIN
巴黎圣日耳曼

VS

利雅得全明星

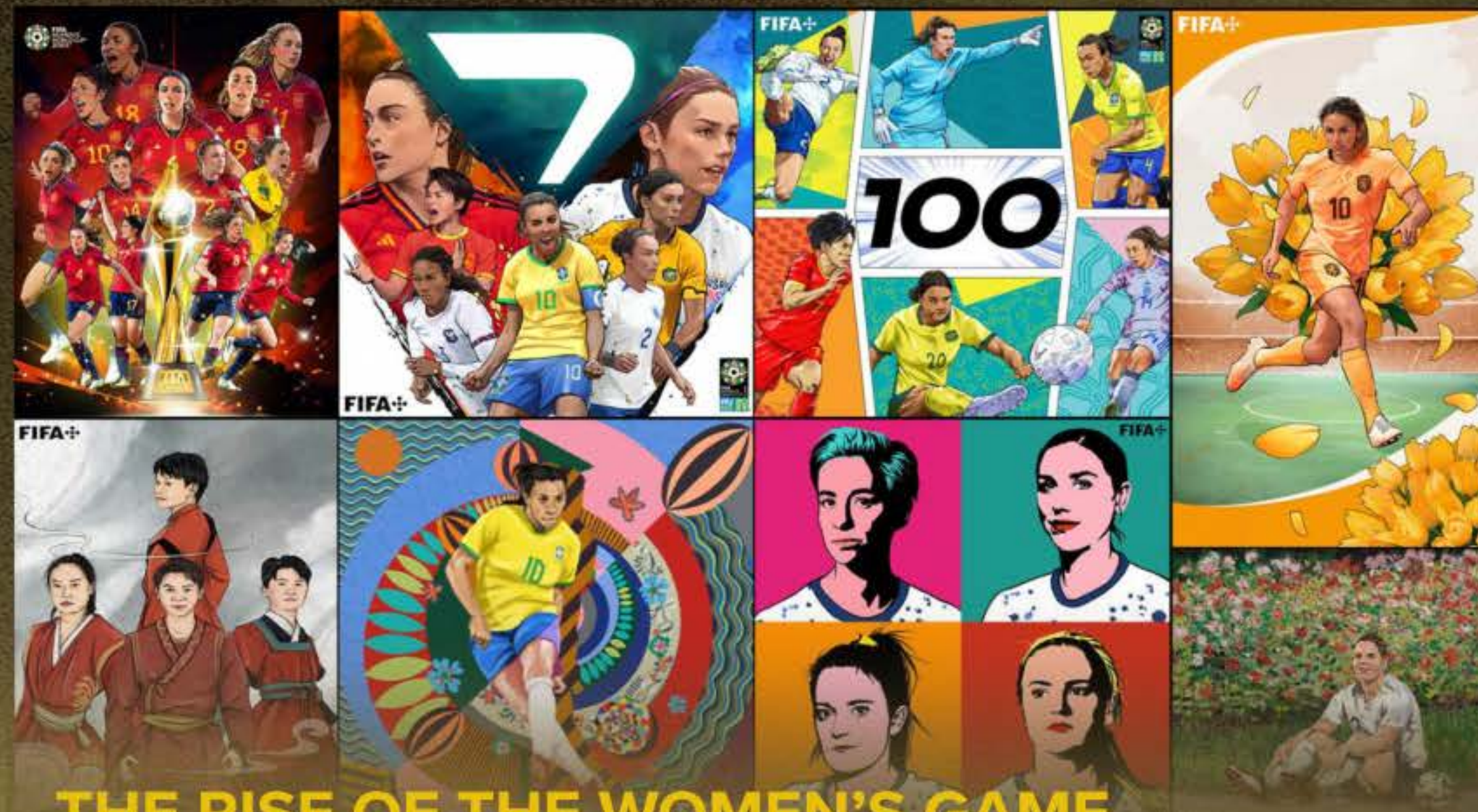
Riyadh Season Team
فريق موسم الرياض

1月20日 凌晨1:00

抖音独家直播

MESSI V RONALDO PAY-PER-VIEW SUCCESS

Messi and Ronaldo's head-to-head in the 'PSG v Saudi All-Star' friendly in January 2023 was dubbed as their final-ever meeting on the pitch, catching the imagination of Chinese fans. The game was placed behind a paywall on Douyin, with fans paying 5 RMB (\$0.72) to access the game. Although the game kicked off at 1 am local time, it attracted over 11M unique viewers, with almost a million fans paying to watch the full game. PSG also attracted 500k new followers to their Douyin account through the game.



THE RISE OF THE WOMEN'S GAME

China recorded the highest TV audience for a single game at a FIFA World Cup in 2023, with 53.9 million tuning in for their loss to England. This record was matched by the team generating higher-than-ever commercial success off the pitch. Ahead of the World Cup, the General Administration of Sport of China and the Chinese FA also released the "China Women's Football Reform and Development Plan (2022-2035)", stating their intention to bid for the hosting rights of the 2031 FIFA Women's World Cup, whilst putting actionable plans in place to elevate the status of the game in the country.

STANDOUT MOMENTS OF THE YEAR



Image Credit To CFP

WORLD CUP WINNERS ARGENTINA IN CHINA

Fresh from winning the FIFA World Cup in Qatar, the Argentinian men's national football team touched down in China to play a friendly match against the Australian men's national football team, creating a frenzy online and offline, mainly due to Messi's popularity in China. There were popular live streams, offline partner activations, players launching new Chinese social accounts, and a packed-out newly-built Workers' Stadium in Beijing, of which 90% were wearing blue and white Argentina shirts with Messi's name on the back.



Image Credit To CFP

SAUDI FOOTBALL FEVER

The Saudi Pro League (Roshn Saudi League) caught the attention of Chinese football fans with the move of Cristiano Ronaldo in early 2023. The league launched its official accounts on Weibo and Douyin in China later that year and soon amassed over 200k followers, with engagement performing better than well-established league rivals. This added to a range of broadcast deals struck with leading platforms Bilibili, Migu, Tencent, and Zhibo8.

2024 PREDICTIONS

FOOTBALL CLUBS PRIORITIZE DIGITAL INVESTMENT INTO DOUYIN

International sports accounts are now choosing Douyin as their launch platform in China, with Weibo being seen more and more as a supporting platform. The opportunity for football properties is through relating their content to these platform trends and functions to reach this huge audience. Douyin's reach and engagement dwarfs any of its competitors. When looking at the top 15 clubs on each platform we saw Douyin engagement 3x higher than Weibo, and even further ahead of any other platform.



DIGITAL PLATFORMS TO MAKE MIGRATION OF FANBASE CROSS-PLATFORM EVEN HARDER

Migrating users across platforms in China's social network is increasingly challenging. Platforms are inward-focused, creating features internally and sidelining external applications, meaning it is still very difficult to drive from social to owned platforms. In 2023, we saw Douyin introduce a food delivery service within its app, bypassing collaboration with industry leaders Meituan and Eleme.



Image Credit To CFP

2024 PREDICTIONS

CHINESE CREATORS AND BRANDS RUSH TO MAXIMIZE EURO ATTENTION

This year's major international football tournament is once again expected to dominate the attention of the Chinese public. We expect to see a record number of Chinese content creators descend on Germany, creating for their own channels as well as in collaboration with domestic and international brands. More Chinese brands than ever are official partners with the tournament. Hisense, Alipay, vivo, BYD, and Aliexpress are all Chinese brands that want to use their partnership with the tournament as a springboard to growing their global market share whilst influencing the Chinese market.

Image Credit To CFP



DIGITAL COLLECTIBLES CONTINUE TO FIND THEIR GROOVE IN CHINA, FAR AWAY FROM NFTS

China's Digital Collectibles (DC), a variant of NFTs, stand out due to their non-tradability, influenced by local crypto regulations. This deviation shifts their focus towards utilitarian purposes, such as novelty prizing, announcements, and event ticketing. The success and durability of this business model, despite significant investments, remain open for debate.



REST OF ASIA

For the first time in the 13-year history of the Red Card report, we've decided to expand the analysis and rankings from China only to four more Asian countries, bringing Indonesia, Japan, Thailand, and South Korea into the fold. These four regions have become increasingly important for European football clubs' digital engagement with fans, with the primary communication channel being X. Each region has its own unique culture, ecosystem, and language, meaning fans in each region consume and engage with their favorite clubs and players in very different ways.

To help shed some light and identify which clubs are leading the way in each country, we've ranked and analyzed which European football clubs are leading the way on X, and we also provide guidance and insights on what makes these fans tick, as well as what to avoid.



INDONESIA

Rankings:

1. Manchester United 2. Chelsea FC 3. FC Barcelona

Team	Followers	Follower Growth	Engagement	Total
Man United	12	7	27	46
Chelsea FC	24	0	5	29
FC Barcelona	7	4	3	14
Liverpool	3	2	6	11
Man City	2	3	5	10
FC Inter	2	1	5	8
PSG	2	2	1	5
Arsenal	2	1	2	5
Spurs	1	1	1	1

What worked & insights:

• Serie A side Juventus was the most-tailored and localized European football club on social media in Indonesia throughout 2023. The club consistently created highly cultural content, especially in the popular cartoon format. Juventus remains aware of the digital trends by regularly posting geo-targeted local content on the two main platforms in Indonesia currently - Instagram & TikTok. The club's biggest success was their well-received, on-the-ground event - the J Village - which was held over three consecutive days in Jakarta, with around 5k visitors & 2.5k attending a viewing party.

Islamic Culture:

• Indonesia has the largest Muslim population in the world (229m based on Statista 2023), and Islamic culture significantly influences social media content and discussions.

Region insights:

- Population: 277.5m · GDP per capita: \$5,147
- Active social network penetration: 60.4%



Source: Euromonitor, Statista

Best Local Practices:

HIGHLY LOCAL BUT FUN:

• Clubs' local content which is fun and tends to be simple works well. "Less is More" applies here, as graphic/cartoon content or short videos that are fun/funny, work much better to reach the audience, than valuable/inspirational-focused content.

DIFFERENTIATE OFFICIAL CLUB ACCOUNT & FAN CLUB ACCOUNT:

• Apart from avoiding obvious things such as discrimination, politics, etc., the delivery of a club's official account must also be clear that this is an official account and not a fan club account.

• Several cases occurred where club accounts posted provocative things with provocative words, which then led to backlash from the opposing fans and even their fans. Things that fan-club accounts usually do but are not for official club accounts.

CHEESY CONTENT:

• Something that should be avoided to maintain the club's dignity. Several cases have occurred in Indonesia, where there is cheap content such as giveaways that are too frequent or content that is out of context. Sometimes it works, but the club's brand will be looked down upon and only attract audiences that have no sense of loyalty.



JAPAN

Rankings:

1. Manchester City 2. Liverpool 3. FC Barcelona

Team	Followers	Follower Growth	Engagement	Total
Man City	2	5	19	26
Liverpool	2	3	15	20
FC Barcelona	4	1	14	19
Real Madrid	5	2	11	18
PSG	2	1	5	8
Man United	2	1	4	7
FC Inter	1	1	4	6
BVB	1	1	1	3

What worked & insights:

- Real Sociedad has been growing in the Japanese market thanks to their local superstar Takefusa Kubo. In less than 18 months, their local X account has gained over 100k followers. Along with their localization efforts, they have been working with local KOLs like Kohaloon - a local YouTuber involved in five online activations that consisted of live coverage of their matches. Adding to this, Real Sociedad JP localizes its banners and account logos to fit the market.
- LINE, a unique communication platform for the country that has expanded overseas, is where most of the Japanese population is (70%). The main purpose of the platform is to text and chat (WhatsApp), therefore, is currently not a platform for fans to follow club news.
- Other social media platforms such as YouTube, X, Instagram, and TikTok are gaining more popularity in the market.

Region insights:

- Population: 124.4m · GDP per capita: \$36,769
- Active social network penetration: 74.4%



Source: Euromonitor, Statista

Best Local Practices:

NATIONAL PRIDE & REACTIVENESS TO LOCAL EVENTS:

- It's important to celebrate key local dates such as New Year and Golden Week with date-themed assets and adhere to cultural nuances.
- Be reactive to locally relevant events and incidents that take place in the country, such as national football team matches, key incidents, and trending topics.

COLLABORATING WITH INFLUENCERS:

- Local influencers with their communities bring together a fresh outlook to activities online and offline, leading to a growth in followers and engagement.

GIVEAWAYS:

- As with any other market, starting a giveaway campaign gathers the attention of the market. In Japan, keeping it simple gives the best practice for the campaign and its effectiveness. The best-performing items are signed items from the most well-known players of the team.
 - Avoid targeting campaigns in which users have to expose themselves. Japanese don't like to reveal their identities easily, therefore creating campaigns or posts with CTA characters may result in a poor participation rate.

SOUTH KOREA

Rankings:

1. Tottenham Hotspur 2. Paris Saint-Germain 3. Manchester City

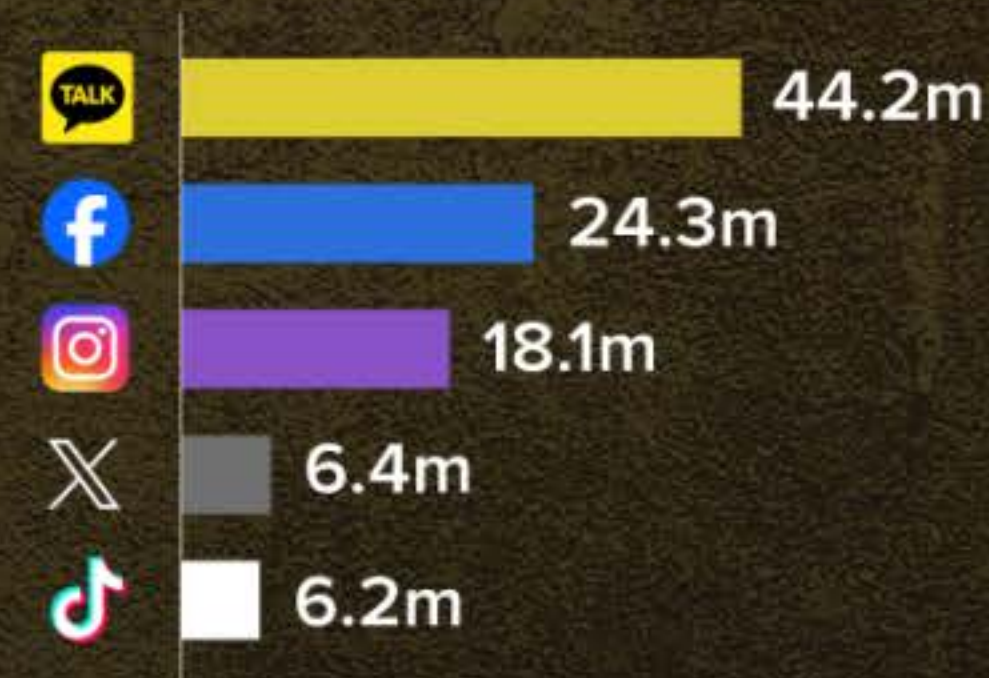
Team	Followers	Follower Growth	Engagement	Total
Spurs	6	10	11	27
PSG	3	7	6	16
Man City	3	3	1	7

What worked & insights:

- PSG was the most successful throughout 2023 in terms of local events and content in South Korea.
- With their signing of popular Korean player, Lee Kang-In, there was plenty of South Korea-dedicated content on the club's channels such as the Hangeul Kits, Korea Tour, and hyperlocal content (ie. Chuseok and Seollal content, Hangeul Day, writing in Korean, etc.).
- Although most people are on Instagram, it's harder to grow on this platform than other platforms, because Koreans tend not to follow accounts on Instagram with their accounts.
- On the other hand, Koreans are not on X a lot, but in terms of going viral, it is easier to go viral on this platform, which can eventually lead to growth..

Region insights:

- Population: 51.5m · GDP per capita: \$35,589
- Active social network penetration: 92%



Source: Euromonitor, Statista



Best Local Practices:

NATIONAL PRIDE:

- Any content regarding the nation's current trends and events performs well across most social platforms. These include but are not limited to trending music, TV shows and movies, the national team playing, and local holidays.

VIRALITY:

- It's easy for content to go viral for the South Korean audience. Once something goes viral and word spreads, it tends to blow up faster than other regions. X is the platform where this is the easiest to do, usually through K-pop content as most K-pop fans are mostly on X.

POWER OF K-POP AND K-DRAMAS:

- Trends can be mostly found in the entertainment industry, specifically K-Pop and K-Dramas/movies in South Korea. Therefore, the fastest way for content to go viral is by connecting them to trending K-pop and K-dramas.

- Any sensitive topics relating to history or any content/graphics that can be considered "Japanese-like" or "Chinese-like". Although both are Asian countries, Koreans can be very sensitive to being associated with a different country's culture.

THAILAND

Rankings:

1. Liverpool 2. Chelsea FC 3. Chelsea FC

Team	Followers	Follower Growth	Engagement	Total
Liverpool	8	1	6	15
Chelsea FC	6	0	1	7
Man City	1	2	1	4
Spurs	1	2	1	4

What worked & insights:

- Fans in Thailand are constantly creating and producing events, they do it out of love and loyalty to the club which results in regular marketing activities.
- However, other football clubs such as Tottenham Hotspur, Bayern Munich, and Manchester City have also begun to build stronger publicity in Thailand. Considered an important country in the ASEAN region, football fans have the potential and can come together to create good activities.

Region insights:

- Population: 71.8m • GDP per capita: \$7,571
- Active social network penetration: 72.8%



Source: Euromonitor, Statista

Best Local Practices:

THAI CULTURE INTEGRATED INTO CLUB CONTENT:

- Thailand's most important and cultural days are becoming increasingly important content opportunities for leading European football clubs. Whereas in previous years clubs have tended to stay away from these moments out of not culturally understanding them, we're seeing more confidence and learnings which show the stronger connections between clubs and the region.

NEW THAI TRENDS ARE BEING USED TO FURTHER OUR SUCCESS:

- Popular music and new social media trends have become a go-to for clubs to reach new audiences and show that they understand what's currently popular and being talked about online.

ON-GROUND ACTIVITIES:

- Clubs like PSG created marketing activities, allowing them to attract many fans in the heart of Bangkok, whilst Tottenham Hotspur also successfully visited Thailand and did joint activities, helping to establish strong relationships with fans by frequently giving away souvenirs from the club, and organizing meet-and-greet activities.

PARTICIPATE IN NATIONAL MATTERS:

- Through supporting important figures of the country in various events helps improve relationships with fans, such as athletes in the Olympics, the Thai national football team in high-level competitions, or important events of the masses in a positive light.

SPEAKING OF ROYAL CONTENT:

- Even though the world has entered a new era, this matter is still a sensitive matter for more than half of Thai people.



ABOUT

ONE SIXTY/NINETY

160over90 is an award-winning cultural marketing agency that elevates brands by creating ideas for the world to obsess over and sharing moments where people feel something real. With 800+ thinkers, doers, and makers across every cultural corner of the globe, the agency offers a full-service, channel-agnostic approach and a deep connection to the people, places, and properties that drive the conversation of tomorrow. Turning fans into fanatics for companies of all sizes, 160over90 works with leading brands including AB InBev, Audi, DP World, Marriott International, USAA, and Visa. 160over90 is part of global sports and entertainment company Endeavor.



Founded in China in 1999, Mailman has evolved to become one of Asia's leading sports digital agencies. We are digital marketers who help sports rights holders enhance their local brand equity and create sustainable presences. We exist at the intersection of digital & technology, helping the world's biggest sports, entertainment & lifestyle brands build successful businesses in international growth markets. Mailman is part of 160over90, Endeavor's global cultural marketing agency.

ENDEAVOR ANALYTICS

Endeavor Analytics brings action to insight and provides comprehensive intelligence to clients on a global scale. As part of Endeavor, they pulse the marketplace, leverage insight and provide solutions to unique challenges. Utilizing best-in-class data resources and expertise, Endeavor Analytics fuels what matters to your consumers, audience, and fans. Endeavor Analytics supports a range of categories, including; entertainment, sports, fashion, culinary, brands and the arts.

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